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Carlton Health Forum

Opportunity and Community Engagement Report



May 2025



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Executive Summary | Background

Background

Strategic Outcomes Planning Model

In August 2022, Gedling Borough Council (GBC) agreed to undertake a Strategic Review of Community Facilities, based on Sport England's Strategic Outcomes Planning Model (SOPM).

The purpose of the review was to understand 'why', 'where' and 'how' local physical activity, leisure, sport, wellbeing and community services can be continued to be delivered in a sustainable manner.

Max Associates acted as lead consultants on behalf of the Council for the development of the SOPM and an Indoor Built Facilities Strategy.

The SOPM is developed through 4 stages:

1. **Outcomes:** Develop shared local strategic outcomes for your place.
2. **Insight:** Understand your community and your place
3. **Interventions:** Identify how the outcomes can be delivered sustainably.
4. **Commitment:** Secure commitment to a strategic approach and delivery of outcomes

This work was based on Sport England guidance and frameworks to ensure it is robust to inform future business planning, resource allocation and applications for external resource.

The strategic need for investment into the Boroughs physical activity, leisure, sport, wellbeing and community services has been set out in this strategy.

In November 2023, GBC adopted the Strategic Outcomes Planning Model Stage 1 Vision and Outcomes and the Playing Pitch and Outdoor Sport Strategy.

The Stage 1 Strategy identified the following vision statement:

"Gedling is a healthy borough with its people more active, more often, and promotes health equality across our communities."

Facility Interventions and Indoor Built Facility Strategy

A separate Indoor Sport Built Facility Strategy (IBFS) has been produced and its recommendations have informed the facility interventions of the SOPM. This has considered future needs and requirements for:

- Swimming pools
- Sports halls
- Health and Fitness
- Studios
- Squash
- Indoor Bowls
- Indoor Tennis
- Gymnastics

The facility intervention recommendations include:

Carlton

Replace Carlton Forum Leisure Centre with a new facility on the Richard Herrod Centre site, incorporating an 8-lane swimming pool, teaching pool, gym, studios, multi court sports hall, community space and assisted exercise suite. This would consider the need for future indoor bowls provision on that site and any wider community health and wellbeing hub activity.

The Council has consulted with leading leisure development experts Alliance Leisure Services Limited (ALS) to review the scope and opportunities for this new centre through an initial Feasibility approach with potential for follow-on RIBA stages to be instructed in continuation.

Carlton Forum Leisure Centre

Due to the aging infrastructure of the existing Clifton Forum Leisure Centre, which, despite past refurbishments, is no longer considered fit for purpose.

Carlton Forum currently acts as the flagship site in terms of participation and financial performance but is at the highest risk in terms of asset management due to the building and its infrastructure being over 50 years old. This site is managed under a joint use agreement with Nottinghamshire County Council and Redhill Academy Trust and not owned by Gedling Borough Council. Therefore, asset management is a joint responsibility of the respective joint use partners.

Richard Herrod Centre site is owned and maintained solely by Gedling Borough Council but has the highest subsidy of all its leisure facilities. With a combination of future capital receipts and borrowing the Council can only afford to build new on one of its existing sites. Due to these factors the priority need for future leisure facility investment by the Council is the development of a new Carlton centre on the current Richard Herrod site.

Executive Summary | Needs & Demand

Optimising the Programme

Develop programmes catering to middle-aged and older adults, while maintaining offerings for youth to encourage future engagement. Core activities such as fitness, swimming and sports hall provision will ensure sustainable revenue and participation. Consideration should also be given for targeted provision to ensure the facility remains inclusive and accessible for the community.

Fitness

Fitness gyms are a core provision within leisure centres as they attract a wide audience, provide a consistent revenue stream, and support public health by promoting physical and mental well-being. They complement other facilities like swimming pools and sports halls, encouraging social engagement and member retention.

With relatively low operational costs and year-round usage, gyms maximise space efficiency and contribute to the financial sustainability of the new leisure centre, making them essential for both community health and sustainable operations.

Latent demand analysis suggests a new CFLC could attract c3,600 fitness members, approximately +1,100 compared to existing.

Group Exercise

Attracting new customers and motivating your existing ones, can all be enhanced by high quality innovative design features within the group exercise spaces.

Creating a fun, welcoming, and inclusive environment can leave a lasting impression and keep participants coming back for more.

Swimming

Swimming pools are essential within leisure centres as they provide inclusive, low-impact exercise suitable for all ages and abilities. They support public health by improving cardiovascular fitness, strength, and mobility, especially for older adults and those with disabilities or injuries. Pools encourage water safety education, offering swimming lessons that are vital life skills for children and adults alike. They also serve as hubs for social engagement, hosting family activities, aqua fitness classes, toddler splash play and competitive swimming.

Active Ageing

Active ageing fitness programs enhance mobility, strength, and heart health while reducing fall risk and managing chronic conditions. They support cognitive function, reduce stress, and improve sleep. Social benefits include reducing isolation and boosting confidence. Overall, these programs promote longevity, independence, and a better quality of life.

As of the 2021 Census, Gedling Borough had a population of approximately 117,300 people. Of these, about 25,300 individuals were aged 65 and over, representing 21.6% of the borough's population. This proportion is higher than the national average for England, where 18.4% of the population were aged 65 and over in 2021.

Between 2011 and 2021, the number of residents aged 65 to 74 in Gedling rose by approximately 2,400, a 21.7% increase.

In summary, Gedling Borough has a higher proportion of older residents compared to the national average, with a notable increase in the 65 to 74 age group over the past decade.

Active Play

Active play solutions can significantly improve the health of a local population by promoting physical activity in an engaging and accessible way.

A play solution not only offers these benefits to children within the community, but it also helps turn the facility into a family destination, which increases dwell time, and adds further revenue potential and commercial gain for the facility.

Family play provision can provide a wide of range of economic and social value. Play is essential to children's physical, mental and social development, health and well-being.

1. Encourage Movement – Playful environments motivate children and adults to be more active, helping combat sedentary lifestyles.
2. Improve Physical Health – Regular activity improves cardiovascular fitness, muscle strength, coordination, and overall well-being.
3. Support Mental Well-being – Active play reduces stress, anxiety, and depression, enhancing mood and cognitive function.

The borough has an over-representation of 0–14-year-olds and 15–24 year olds relative to the rest of England.

Children aged 0 to 14 years made up approximately 17.7% of Gedling Borough's population. This is slightly higher than the national average for England, where 17.4% of the population were in this age group.

Executive Summary | Product & Programming

Product and Programming

The report concludes with a product directory of some of the latest innovations and trends that could be considered if investment was available in the future.

Unique User Experiences

Creating memorable experiences involves going beyond traditional workouts to engage participants on a deeper level. This can include incorporating innovative training techniques, music, lighting, and social activities that foster a sense of community and connection among participants.

Creating a fun, welcoming, and inclusive environment can leave a lasting impression and keep participants coming back for more.

Innovative Product Solutions

Innovative product solutions can attract users from a larger catchment and provide a differential from the competition.

Product solutions that appeal to user groups such as active ageing, families or group exercise enthusiasts can have a transformative impact on the social value and commercial return of the facility.

- ◆ Family entertainment solutions
- ◆ Active ageing products
- ◆ Experience/signature exercise studios
- ◆ Inspirational gym design
- ◆ Multi-purpose solutions such as 360 projection

10 reasons why unique experiences and product innovation should be considered

1. Competitive Differentiation

Unique products will help Carlton Forum Leisure Centre (CFLC) stand out as a service and within competitive markets such as Inverness. With many national operators, gyms and fitness facilities offer similar services, therefore having distinctive products attracts attention and creates a unique identity.

2. Increased Member Engagement

Innovative products, such as specialised equipment, gamified workouts, or wellness technology, keep members motivated and engaged. This novelty can enhance the overall experience, encouraging long-term commitment.

3. Attracting Niche Markets

Unique products allow operators to target specific demographics, such as reformer Pilates enthusiasts, strength trainers, Padel tennis lovers, or tech-savvy individuals who value wearable fitness devices and smart training solutions.

4. Enhanced Highlife Brand Value

Offering something exclusive elevates the perceived value of CFLC. Members associate the gym or studio with innovation and quality, increasing brand loyalty.

5. Revenue Growth Opportunities

Unique products, such as immersive exercise studios, boutique classes, age focused equipment such as Innerva or play, can open additional revenue streams beyond standard membership fees.

6. Improved Retention Rates

Providing unique and tailored experiences helps build a stronger emotional connection with members. This reduces churn and boosts retention, as customers feel their needs are being uniquely met.

7. Social Media and Word-of-Mouth Marketing

Uncommon or exclusive offerings generate buzz and social media shares, attracting new members through organic exposure. People are more likely to talk about and recommend a fitness operator that offers something different.

8. Catering to Trends and Technology

The fitness industry constantly evolves with new trends (e.g., functional fitness, virtual reality workouts). Unique products will keep CFLC current and/or ahead of the curve, appealing to tech-forward or trend-conscious individuals.

9. Encouraging Personalisation

Products that cater to individual preferences, such as customised nutrition plans or AI-driven training schedules, make the experience more relevant for members, leading to higher satisfaction and better results.

10. Building a Community

Unique offerings, like exclusive events, challenges, or signature classes such as Box12 or Immersive Spin, foster a sense of belonging among members. A vibrant community encourages participation and strengthens loyalty.

Introduction

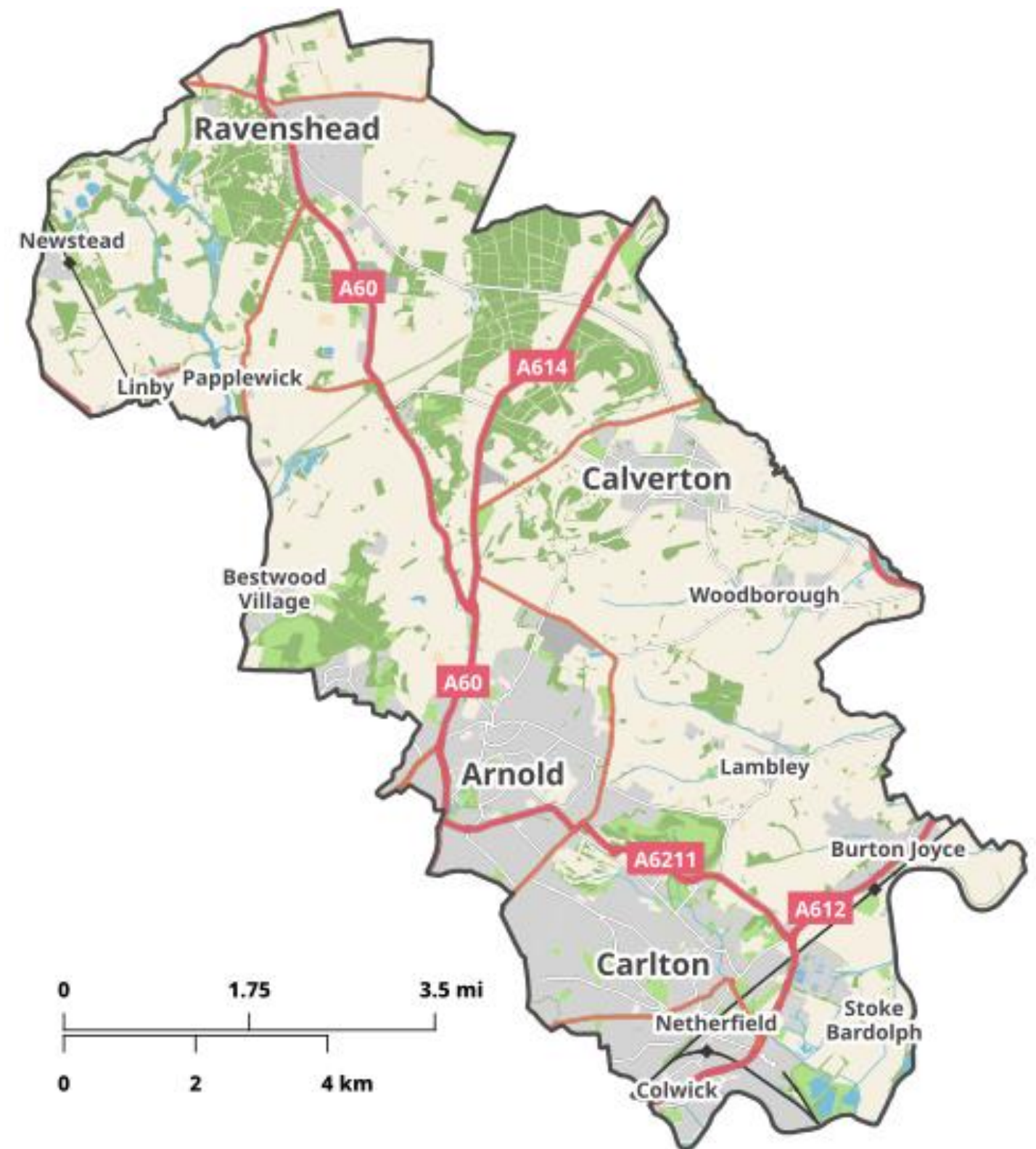
2.1 Borough of Gedling

Gedling Borough Council

Gedling is a local government district with borough status in Nottinghamshire, England. The council is based in Arnold. The borough also includes Carlton along with villages and rural areas to the north-east of Nottingham.. According the latest census, the borough has a population of 117,298 residents (2021).

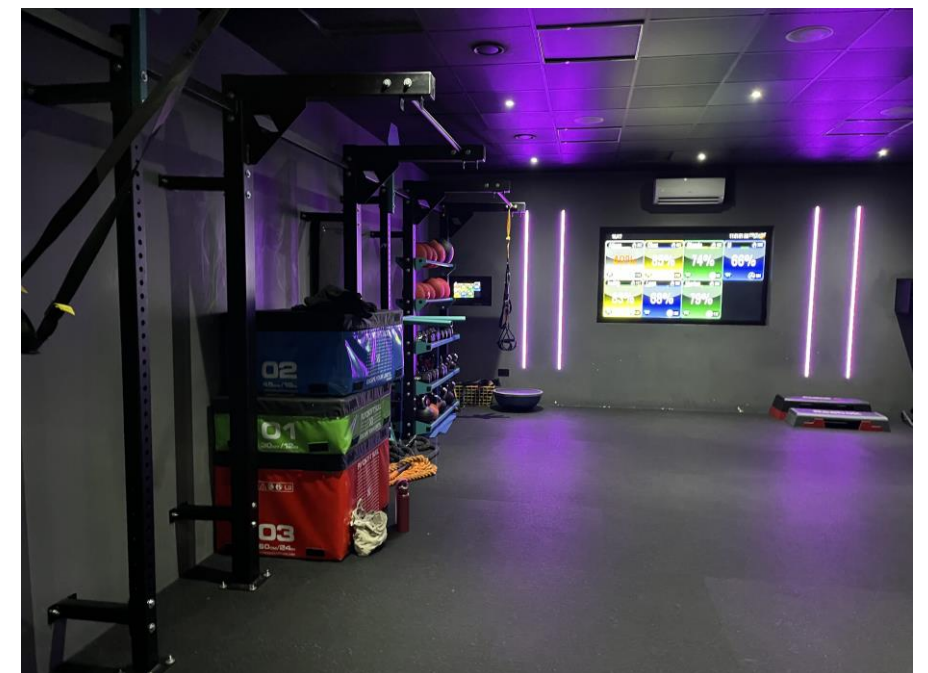
Carlton Health Forum

Carlton Forum Leisure Centre, located on Coningswath Road in Carlton, Nottingham (NG4 3SH), is a comprehensive community facility managed by Gedling Borough Council. The centre comprises of a 25m main pool, teaching pool, 5-court sports hall, c85-station gym, exercise studios, steam/sauna.



Site Context and Existing Facilities

3.1 Existing Facility Mix | Carlton Forum Leisure Centre



Public and Stakeholder Engagement

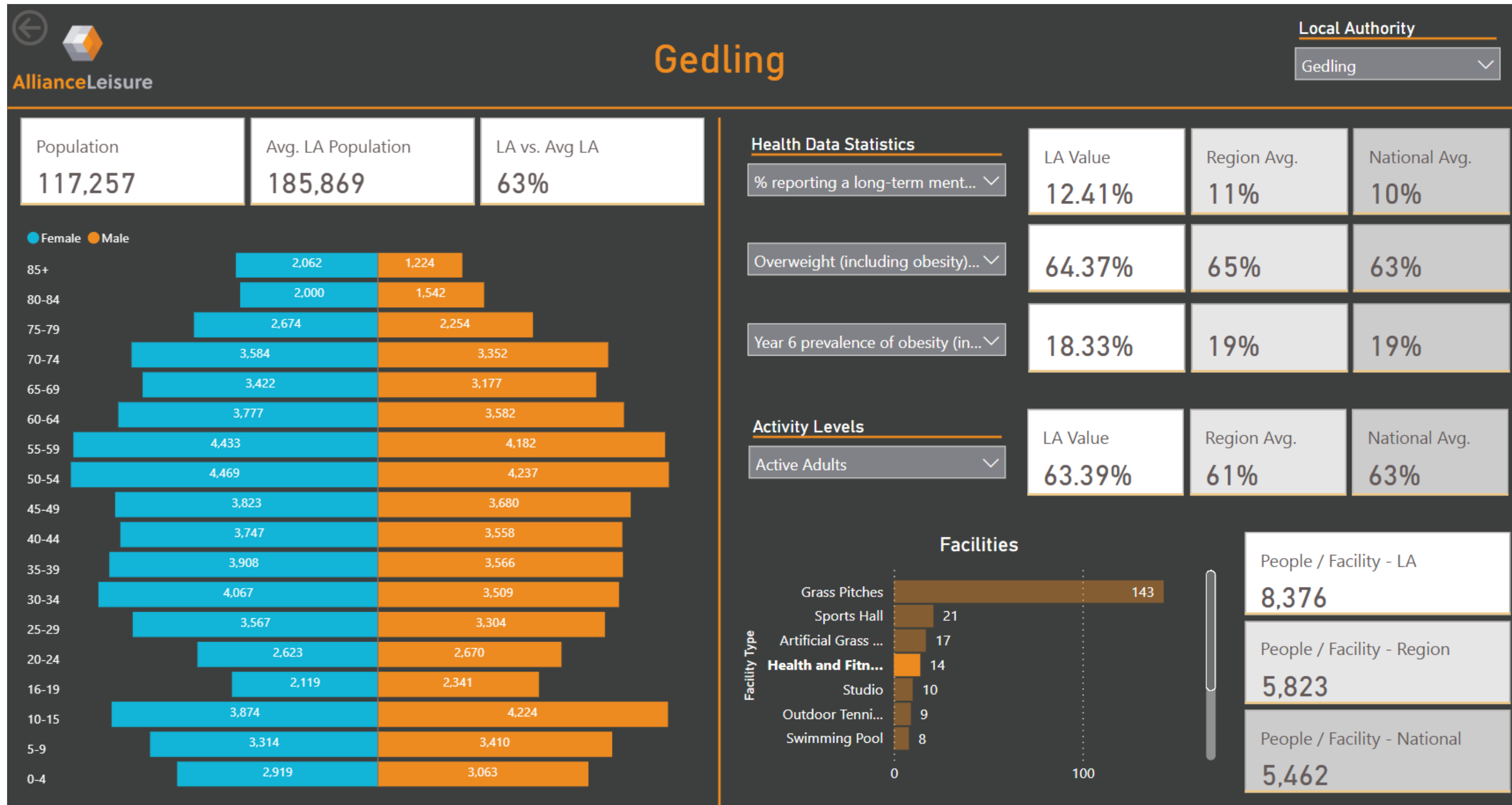
4.1 Surveys

Public and Stakeholder Engagement

4.2 Focus Groups

Demographics

5.1 Population | Gedling Snapshot



Catchment and Demographics

5.2 Catchment | 15 -minute drive time

Catchment (based on a 15-minute drive time)

This “catchment” spans across Carlton, Netherfield, Colwick, Burton Joyce, parts of Nottingham city—roughly a 5-mile radius by road network during off-peak traffic.

Geography & Key Communities

1. Carlton & Gedling

Primarily residential suburbs with pockets of retail and light industrial parks. High concentration of family-oriented neighbourhoods around Carlton Hill and Victoria Retail Park

2. Netherfield & Colwick

Mix of older Victorian terraces and newer housing estates. Colwick Country Park is a major green space.

3. Burton Joyce & Lowdham

(outer edge)Semi-rural villages along the River Trent, higher average incomes, commuter belt into Nottingham.

4. Nottingham City Fringe

Areas such as Sneinton, The Meadows, and St. Ann’s fall into the 15-minute drive, bringing denser urban populations, student accommodation, and regeneration zones like the Waterside.



Catchment and Demographics

5.3 Catchment Summary | 15 -minute drive time

Catchment (based on a 15-minute drive time)

Total population: ~323,121

The population of Gedling in Nottinghamshire was around 117,300 in 2021.

Residents Age Profile

- 0–14 yrs: 18%
- 15–29 yrs: 22% (including UoN and NTU students in city areas)
- 30–49 yrs: 28%
- 50–64 yrs: 17%
- 65+ yrs: 15%

Household Composition

- Families with children: ~45%
- Single-person households: ~30% (higher in city fringe)
- Couples without children: ~25%

Socio-Economic & Lifestyle Insights

Employment & Income

- Median household income: ~£32K p.a. (below national average of £36K)
- Key employment sectors: retail (Carlton), manufacturing & logistics (Gedling), public sector (Nottingham city), education & health.

Car Ownership

- 1+ cars: 75% of households
- No car: 25% (predominantly in urban Nottingham fringes)

Home Ownership

- Owned outright or with mortgage: ~65%
- Private rented: ~20%
- Social rented: ~15%

Facilities & Activity Drivers

Sports and Leisure

Carlton Forum itself (swimming, gym, classes) + nearby venues: Nottingham Tennis Centre, Gedling Country Park, Colwick Athletics Stadium.

Retail Hubs

Victoria Retail Park (DIY, supermarkets), Netherfield Retail Park, Carlton High Street.

Schools and Universities

Several primary & secondary schools feed into the catchment—The Carlton Academy, Richard Waterhouse Centre—and easy access to Nottingham Trent University campuses.

Transport Links

- A52 “Ring Road East” for east–west routes
- A612 towards Nottingham city centre
- Tram stops at Nottingham Road and Netherfield (Line 1)

Participation Potential

Primary target segments

1. Families with children (Swim lessons, soft play, splash play, sensory play, imagination play)
2. Young adults/students (gym memberships, group fitness classes, sports)
3. Older adults (Active ageing, aquarobics, low-impact classes, low impact sports)

Secondary Segments

1. Commuters (early-morning/late-evening gym and group exercise visits)
2. 5. Active retirees (casual swims, walking sports/groups, active ageing activity, bowls)

Summary

The 15-minute drive catchment around Carlton Forum is a blend of suburban family communities, urban fringes with younger adults, and semi-rural villages. Family-focused households and student groups are key, supported by good car-ownership levels and transport links.

Leisure provision can be tailored towards core activities such as fitness, group exercise and swimming inclusive of lessons. Additionally, family focused activities such as adventure play should be considered.

Fitness Catchment and Latent Demand

6.1 Latent Demand | 12-min Drive Time Catchment

Refined Catchment Area

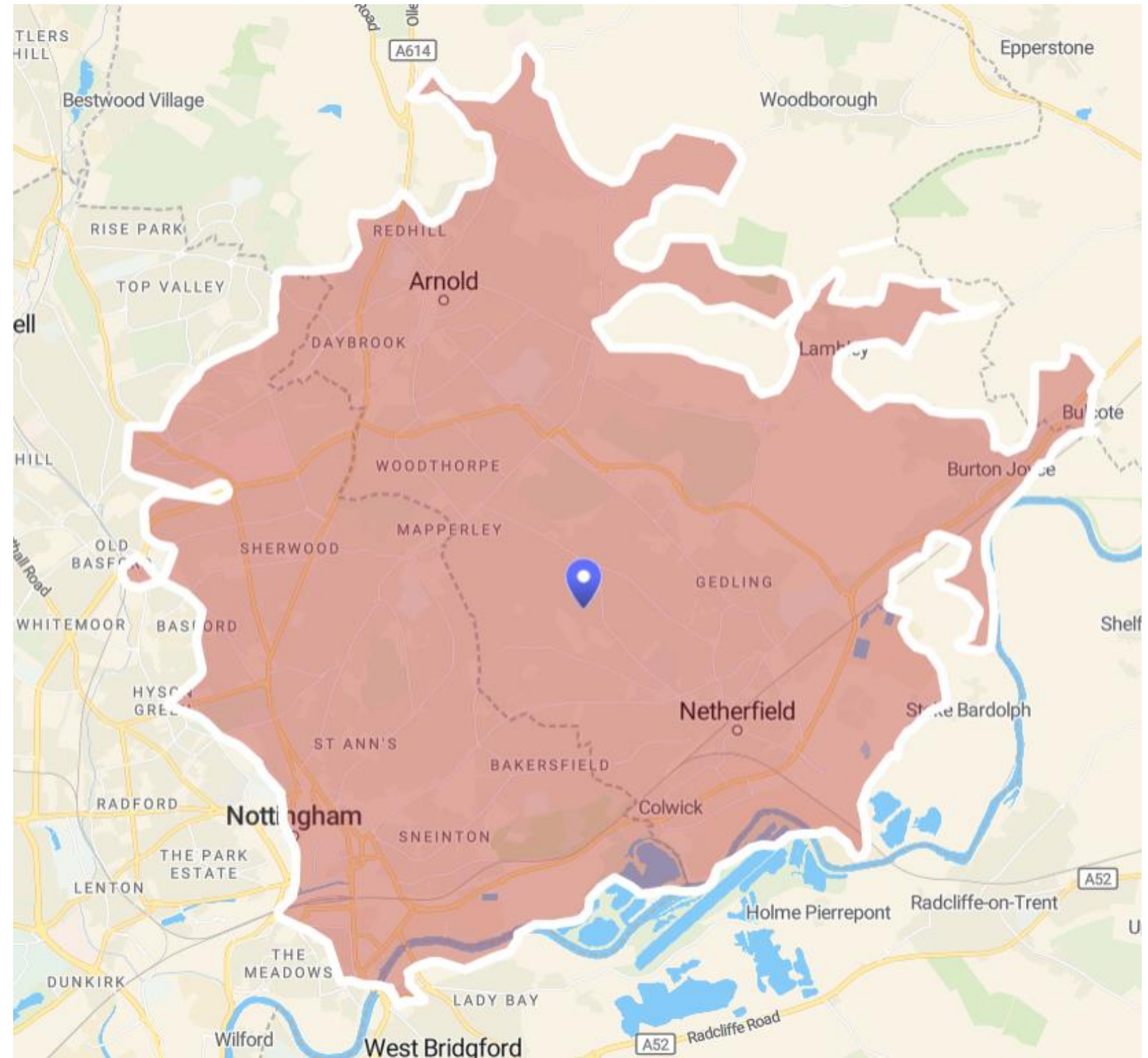
To estimate the latent demand for fitness membership, we have reduced the catchment to focus on a 12-minute drive time. Due to the competition, it is unlikely that people from the west of the city will travel to the Carlton Forum LC and this adjusted catchment reflects that.

The total population within a 12minute drive time is 196,424.

82% are aged 15+ resulting in a total catchment of 161,068.

The table below reflects the key postcodes within the catchment and the % of coverage.

District postcode	% of coverage
NG3	98
NG4	81
NG1	66
NG5	51
NG2	23
NG14	8
NG7	6



Fitness Catchment and Latent Demand

6.2 UK Fitness Market | National Context

UK Fitness Market | Total

According to the [State of the UK Fitness Industry Report](#) 15.9% of the UKs population is a member of a gym.

Public Sector

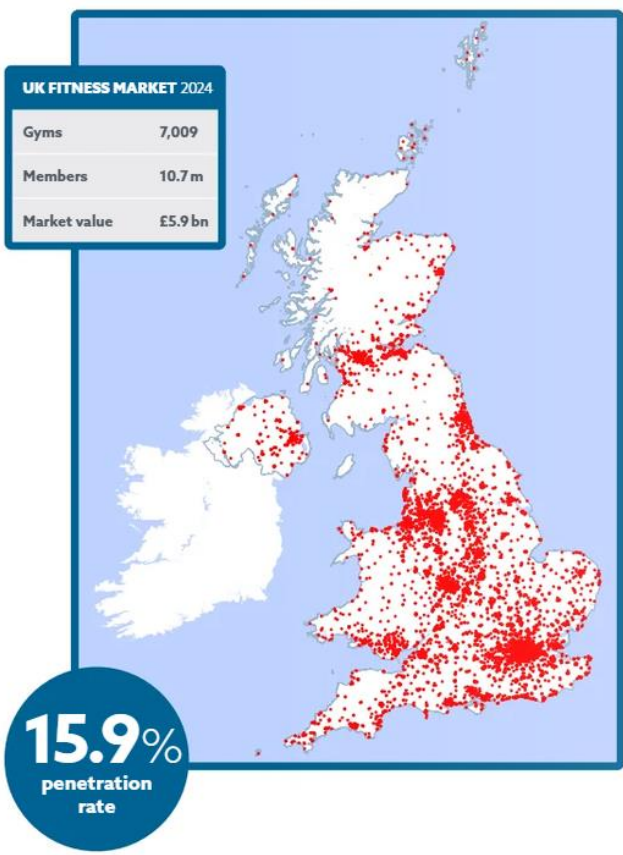
5% of the UKs population is a member of public sector gym.

East Midlands

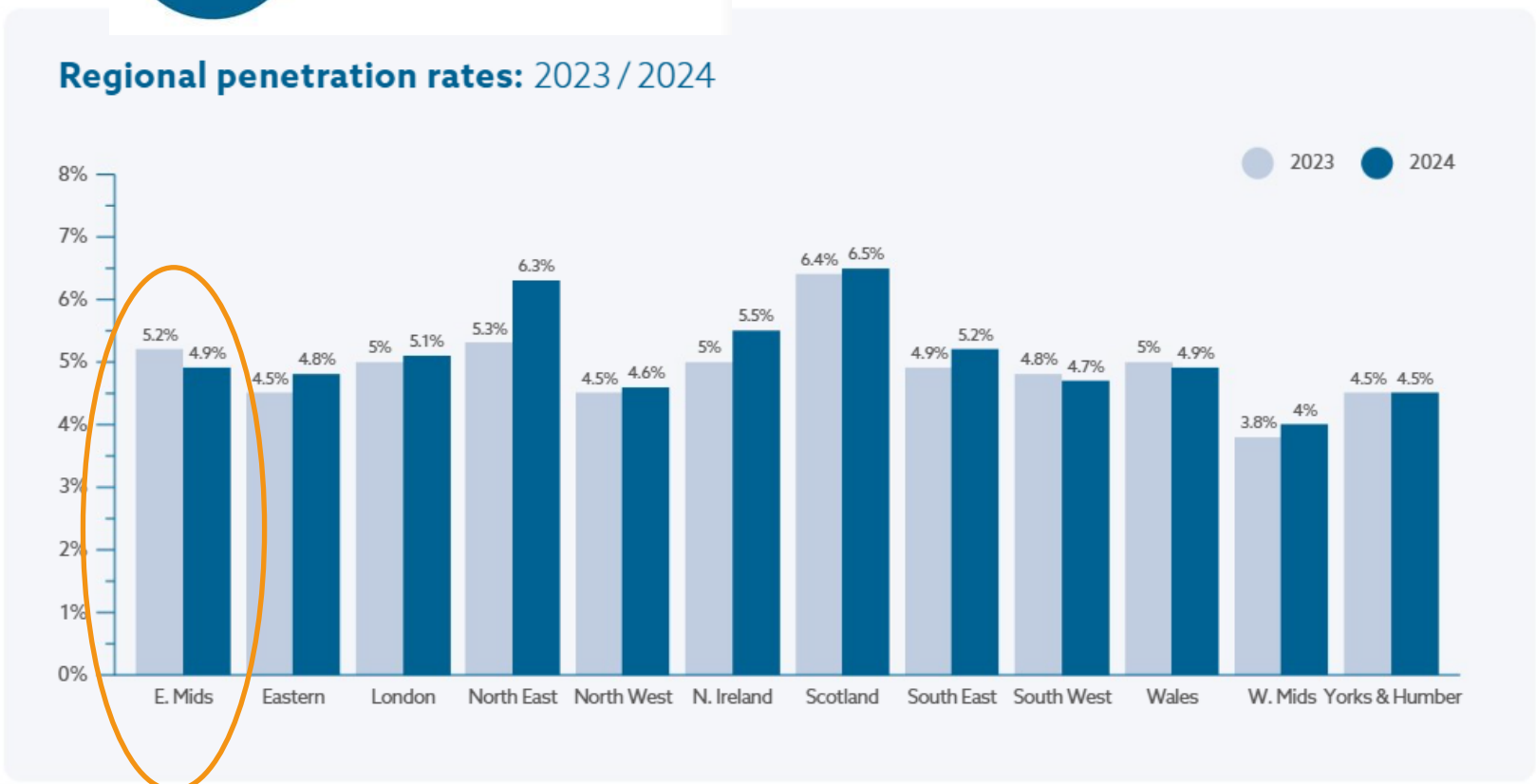
4.9% of the E.Mids regions population is a member of a public sector gym.

Pricing

The ‘2024 UK state of the Industry Report’ highlights that the average headline monthly fee for UK public sector gyms is £32.07, with the E.Mids reported as £31.31.



Regional breakdown			
Region	Gyms	Members	Average fee
East Midlands	168	242 k	£31.31
Eastern	214	303 k	£33.45
London	246	453 k	£37.87
North East	118	167 k	£29.89
North West	259	341 k	£30.06
Northern Ireland	79	105 k	£28.27
Scotland	339	359 k	£28.54
South East	315	484 k	£36.27
South West	240	273 k	£32.75
Wales	171	153 k	£32.92
West Midlands	183	237 k	£29.32
Yorkshire & Humber	164	246 k	£29.29



Fitness Catchment and Latent Demand

6.3 Fitness | Latent Demand



Penetration rate for East Mids

The 2024 fitness penetration rate for the East Mids is 13.9%, meaning that 13.9% of the E.Mids population has a health club membership. The E.Mids penetration rate for local authorities is 4.9% for public sector facilities and 9% for private facilities.

Catchment Population for Carlton Forum LC

The total population for people aged 15+ is 161,068 in 2024.

This is based on a 12 min drive time.

This equates to (13.9%) 22,388 people within the catchment having a gym membership.

We have made a small allowance for the population growth of c1% per year and an estimated completion time of +2years.

Competing Provision

We have reduced the penetration rate for public sector by -1.5% to reflect the proximity of Redhill Leisure Centre within the catchment.

In Nottingham, the estimated private sector penetration rate is estimated to be higher than the national average due to the volume of good quality private operators. As such, we have applied a 40% decay on penetration rates to reflect the competing provision within the private sector.

Estimated Latent Demand

Total Population within 12-minute drive: 161.068 + 2% population growth = 164,289

Total fitness members within catchment (13.9%): 22,838

Target penetration for Carlton Forum LC (4.9% - 1.5%) 3.9% of 129,606 = 5,586 members

Deduct 40% to reflect enhanced private sector provision. - 2,235

New Catchment: 3,352

Add in 5% for people joining outside of the catchment + 279

Total Demand: 3,631 members (2.2% penetration rate)

Current Carlton Health LC membership (15+): -2,500 members

Latent demand +1,131 members.

Membership Fee (Average Yield)

The average yield for public sector gyms in the East Midlands was reported as £31.31 in 2024.

We have made a -£2 allowance to reflect the deprivation within the area.

Proposed average yield: £29.31

Gym Size

NGBs recommend 4.5m2 per gym station.

Members-Per-Station


The UK leisure industry uses a member-per-station indicator across a range of facilities and products. This provides a benchmark when considering user experience and commercial opportunity.

Typically, a public leisure centre offering would target a members per station of between 25-35.

Stations	Space (m2)	Members	Penetration Rate	Annual Revenue
75	337.50	2250	1.37%	£791,370
100	450.00	3000	1.83%	£1,055,160
125	562.50	3750	2.28%	£1,318,950
150	675.00	4500	2.74%	£1,582,740
175	787.50	5250	3.20%	£1,846,530

Fitness Catchment and Latent Demand

6.4 Latent Demand | Fitness



Site & Catchment Selection

Carlton Forum LC (12 mins)

Catchment

161,068

Drivetime

12 mins

Est. Comp. Facs

14

Est. Comp. LA Facs

6

Region

East Midlands

Adj. Total Pen. Rate

0.00%

Adj. LA Pen. Rate

-1.50%

% Decay & Competition

40.00%

% Members Outside

5.00%

Adj. Curr. Membership

2500

Fitness Pen. Rate

13.90%

Pen. Rate for LA

3.40%

Members Lost

2,235

Outside Members

279

Current Membership

2,500

Fitness Catchment

22,838

Catchment (LA Members)

5,586

New Catchment

3,352

Total Demand

3,631

Fac. Latent Demand

1,131

Annual Pop. Growth

1.00%

Years to Completion

2.00

Pop. Adjustment

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Station Range

75

175

Mems / St.

30

Adj. Mem Fee

-£2.00

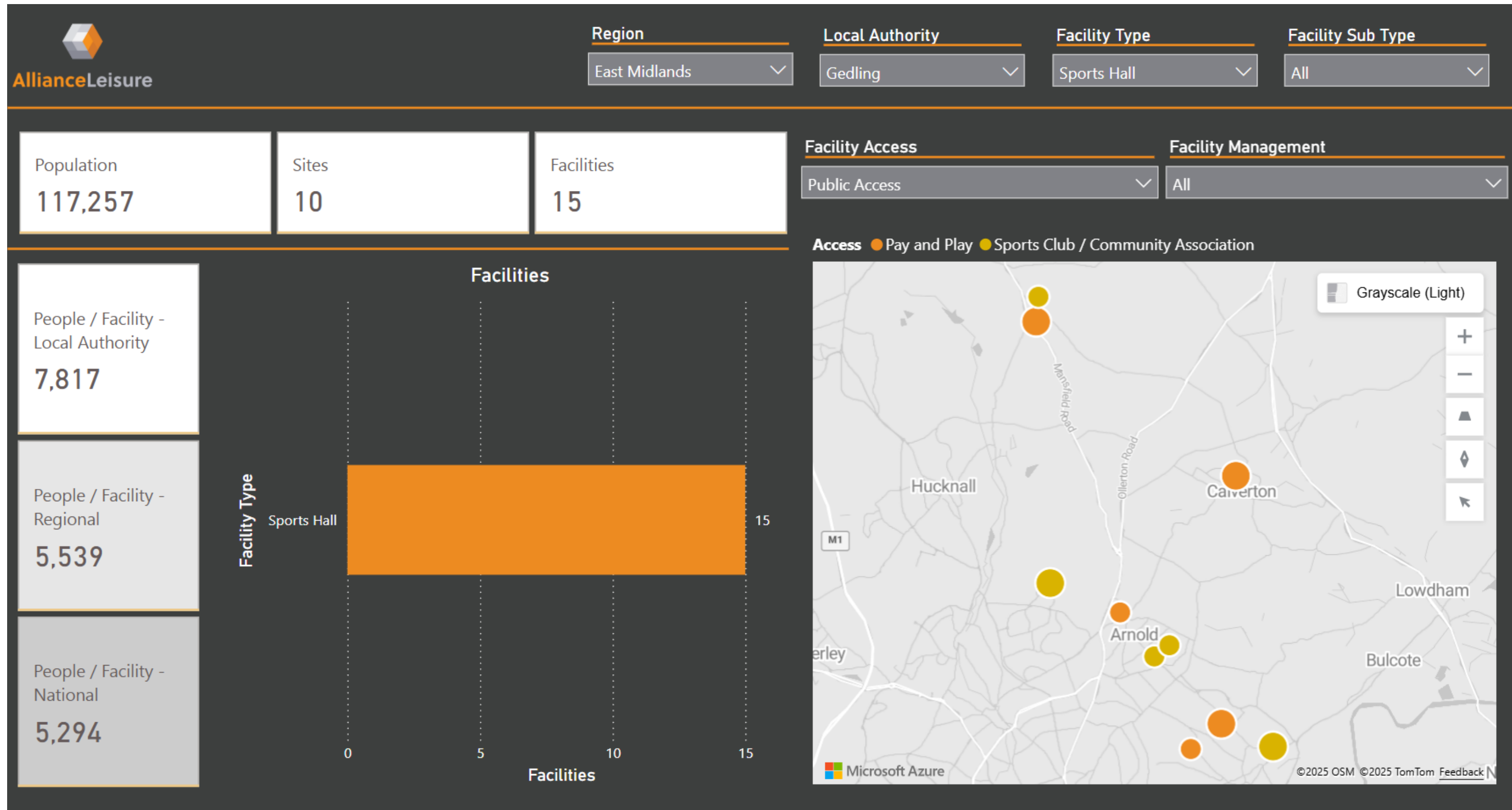
Mem. Fee

£29.31

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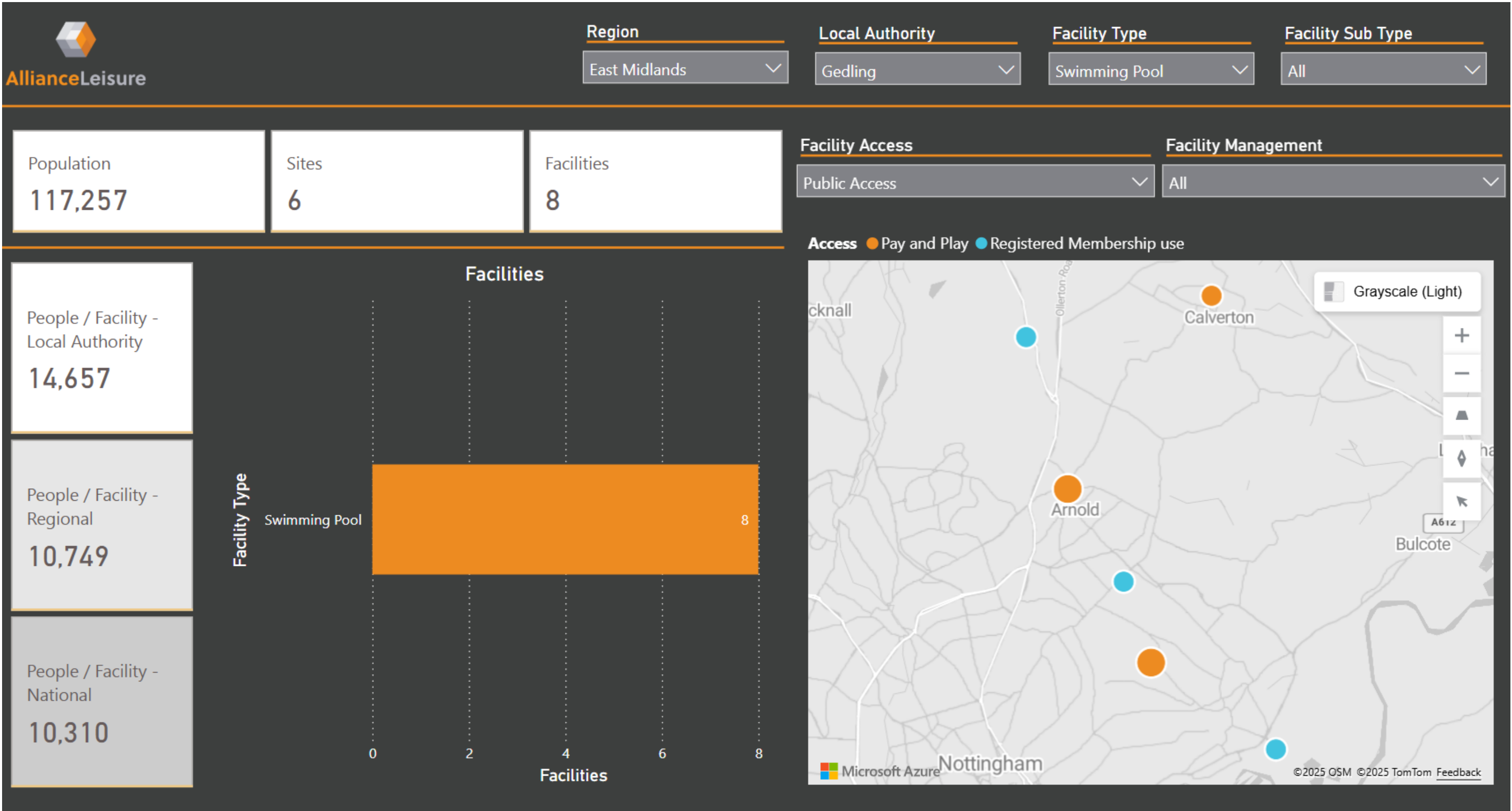
Facilities Provision

7.1 Sports Hall | Public Access



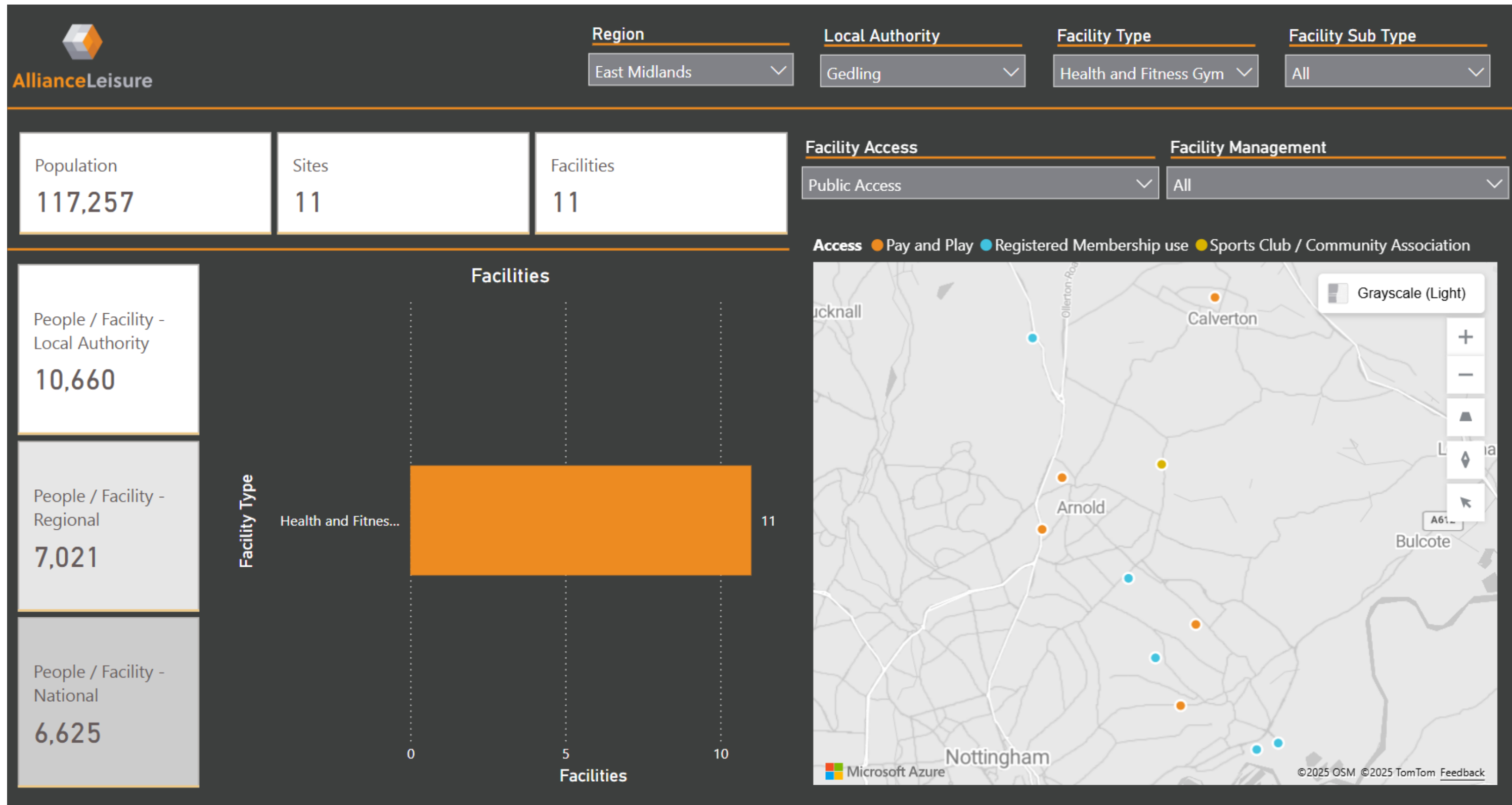
Facilities Provision

7.2 Swimming| Public Access



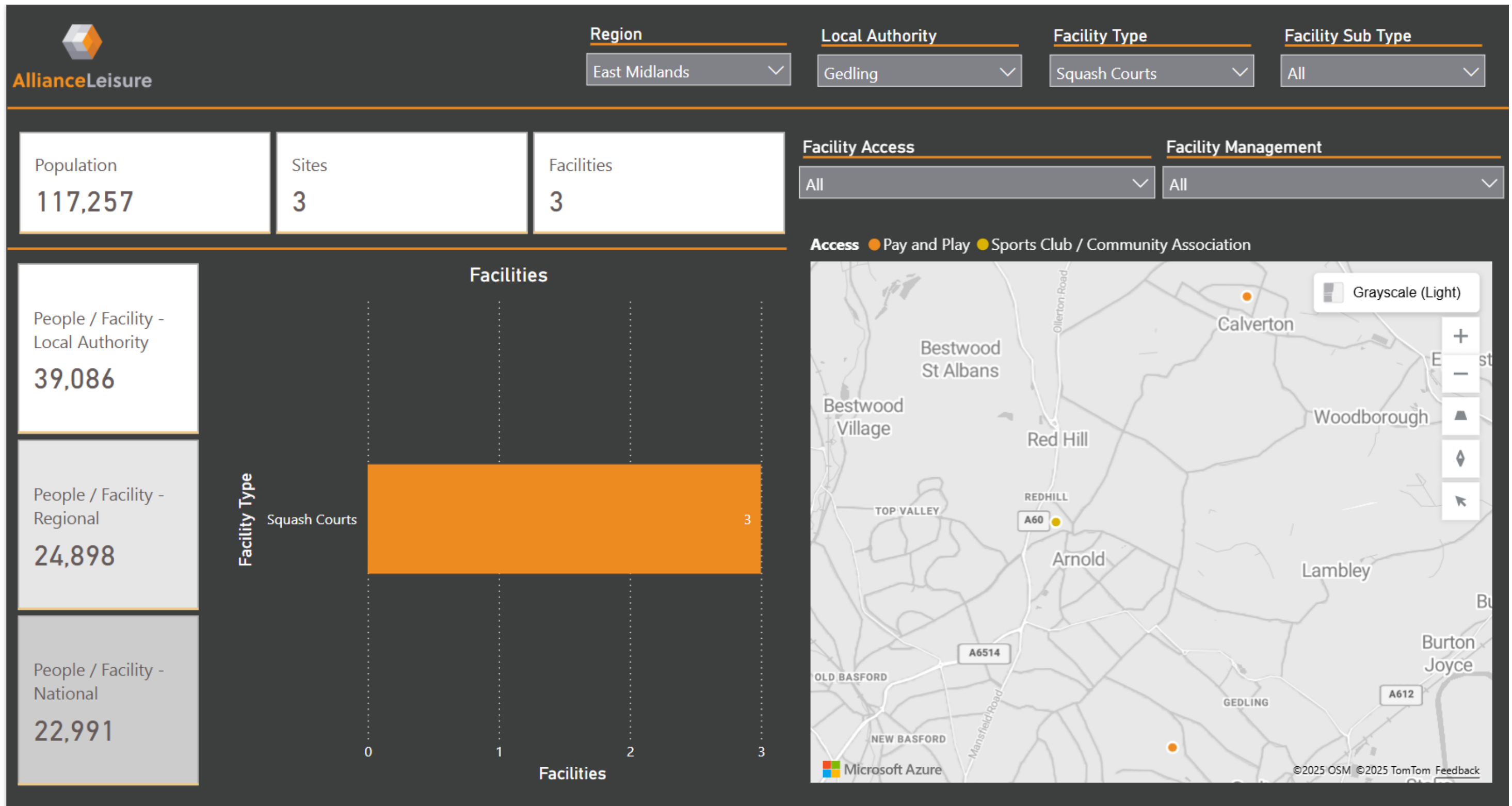
Facilities Provision

7.3 Health and Fitness Gym | Public Access



Facilities Provision

7.4 Squash | Public Access

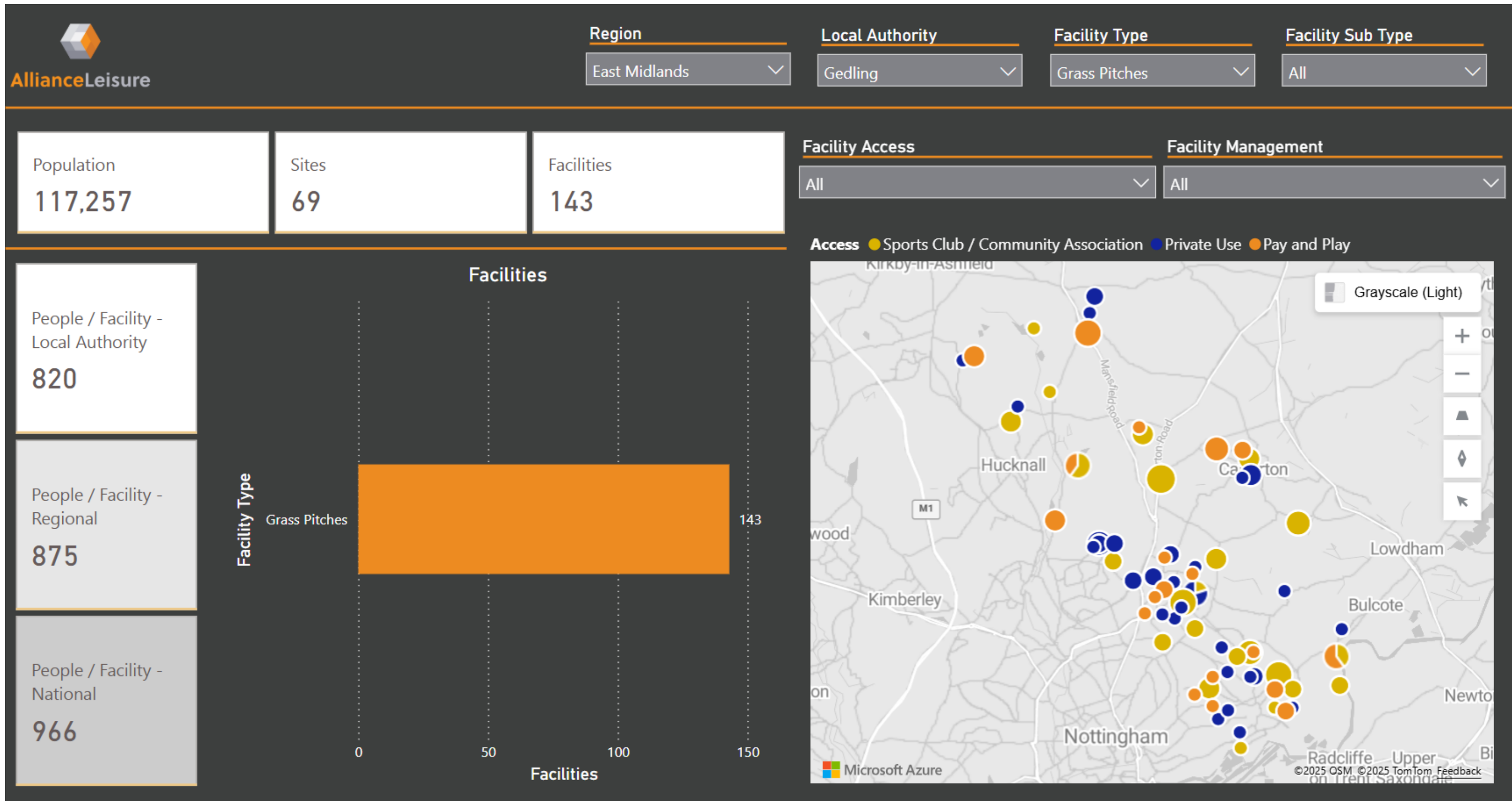


Facilities Provision

7.5 Grass Pitches | Public Access



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Fitness

There are **30 other fitness and leisure facilities within a 20-minute drive (approx. 3–4 miles)** of Carlton Forum Leisure Centre, offering a mix of budget gyms, personal training studios, public leisure centres, and premium health clubs.

This includes **PureGym Nottingham Colwick**, a low-cost gym open 24/7 and priced at **£29.99 per month**, offering a large gym space, classes, and free parking. **Gym Group Nottingham Sherwood** and **Gym Group Nottingham City** are also low-cost providers nearby, both priced at **£15.99 per month**.

In the mid-market bracket is **Everlast Gym**, offering a large multi-zone gym, three studios, a pool, sauna, and steam room for **£45.00 per month**. Other similarly priced private gyms include **Real World Fitness (£45.00)**, **Paradigm Gym (£44.99)**, and **TGS Nottingham (£35.00)**. There are a number of **independent personal training facilities** including **TBH Bootcamp**, **TLB Fitness Studio**, **Witness the Fitness**, and **Cannoville Gym** — all of which focus on small group sessions and 1-1 coaching, with prices generally ranging between **£26.00 and £65.00 per month** where listed, or available upon request.

Premium facilities in the catchment area include **Virgin Active Nottingham** at **£79.99 per month**, offering extensive group exercise timetables, a pool, spa, and multiple fitness zones, alongside **Nuffield Health Nottingham** at **£83.00 per month**, which also includes a pool, sauna, steam room, and wellbeing services.

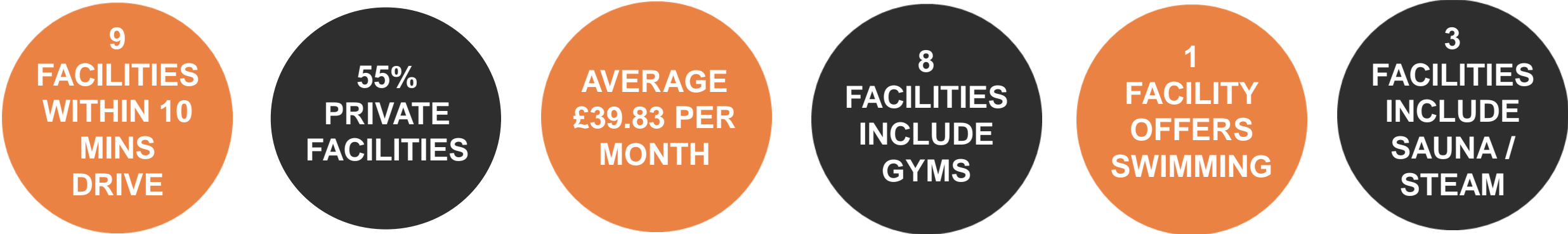
The public leisure provision includes **Victoria Leisure Centre (£37.99)**, **Djanogly Leisure Centre (£37.99)**, and council-run facilities such as **Arnold, Carlton, Calverton, and Redhill Leisure Centres**, typically priced around **£36.00 per month**. These venues offer access to gyms, pools, and group exercise classes but tend to be more limited in gym size and premium services compared to private health clubs.

Competition Analysis

8.2 Overview of the local market | Fitness

The below table highlights Carlton Forum Leisure Centre's closest competitors (by drive time).

Site Name	Facility Type	Drive time (minutes)	Monthly Membership Fee	Gym	Group Ex Studio	No. of Group Ex Studios	Dedicated Group Cycle Studio	Swimming Pool	Sauna / Steam
TBH Bootcamp	Personal training club	6	Price available upon request	No	Yes	2	No	No	No
Nuffield Health Nottingham	Private facility	7	£83.00	Yes	Yes	2	Yes	Yes	Yes
TLB Fitness Studio	Personal training club	7	Price available upon request	Yes	No	0	No	No	No
KK Sports and Leisure Centre	Private facility	7	£30.00	Yes	Yes	1	No	No	Yes
Witness the Fitness Nottingham	Personal training club	8	Price available upon request	Yes	Yes	1	No	No	No
Gym Group Nottingham Sherwood	Private facility	9	£15.99	Yes	No	0	No	No	No
Fitness 4 Women	Private facility	9	£49.99	Yes	No	0	No	No	Yes
Winners Gym	Personal training club	10	£26.00	Yes	No	0	No	No	No
PureGym Nottingham Colwick	Private facility	10	£29.99	Yes	Yes	2	No	No	No



Competition Analysis

8.3 Competitors - Fitness

TBH Bootcamp

Personal training facility – 6 mins drive from CFLC

- ◆ Price depends on PT package
- ◆ Group ex only – no open-access gym
- ◆ 2 group ex studios
- ◆ No dedicated group cycle studio, swim or sauna / steam



Nuffield Health Nottingham

Private facility – 7 mins drive from CFLC

- ◆ £83 per month
- ◆ Includes gym, swim, group ex and sauna / steam
- ◆ Dedicated group cycling studio
- ◆ 2 group ex studios



TLB Fitness Studio

Personal training facility – 7 mins drive from CFLC

- ◆ Price depends on PT package
- ◆ Includes gym and group ex
- ◆ No dedicated group ex or group cycling studio
- ◆ No swim or sauna / steam



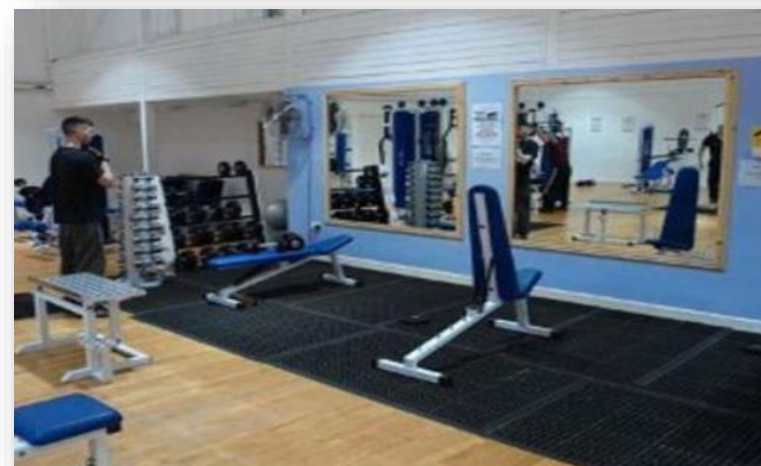
Competition Analysis

8.4 Competitors - Fitness

KK Sports and Leisure Centre

Private facility – 7 mins drive from CFLC

- £30 per month
- Includes gym, group ex and sauna / steam
- 1 group ex studio
- No swimming



Witness the Fitness Nottingham

Personal training facility–8 mins drive from CFLC

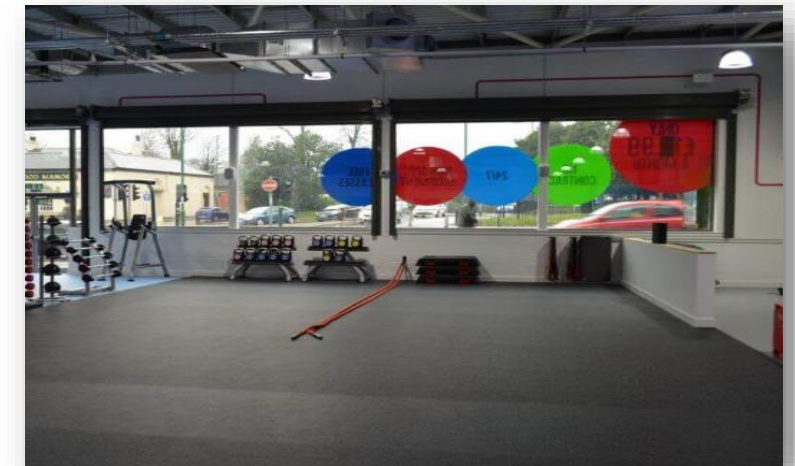
- Price depends on PT package
- Includes gym and group ex
- 1 group ex studio
- No dedicated group cycle studio, swim or sauna / steam



Gym Group Nottingham Sherwood

Private facility – 9 mins drive from CFLC

- £15.99 per month
- Includes gym and group ex
- No dedicated group ex or group cycling studio
- No swim or sauna / steam



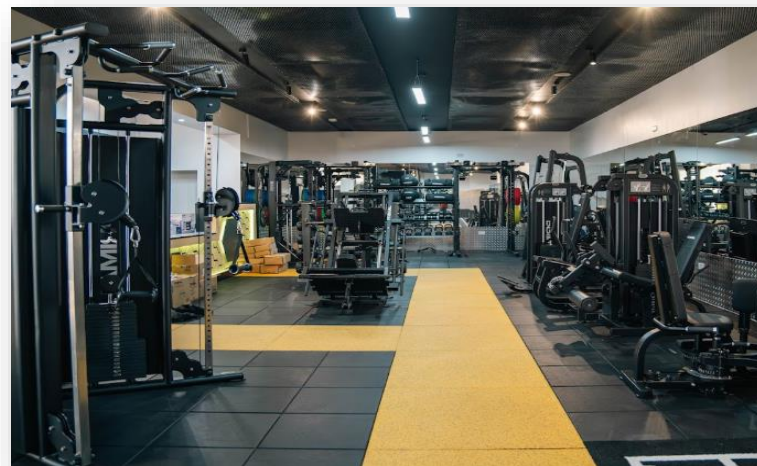
Competition Analysis

8.5 Competitors - Fitness

Fitness 4 Women

Private facility – 9 mins drive from CFLC

- ◆ £49.99 per month
- ◆ Includes gym, group ex and sauna
- ◆ No dedicated group ex or group cycling studio
- ◆ No swim



Winners Gym

Personal training facility – 10 mins drive from CFLC

- ◆ £26 per month
- ◆ Includes gym and group ex
- ◆ No dedicated group ex or group cycling studio
- ◆ No swim or sauna / steam



PureGym Nottingham Colwick

Private facility – 10 mins drive from CFLC

- ◆ £29.99 per month
- ◆ Includes gym and group ex
- ◆ 2 group ex studios
- ◆ No dedicated group cycling studio, swim or sauna / steam



Play

There are **15 indoor play, leisure and activity centres within a 25-minute drive** of Carlton Forum Leisure Centre, offering a range of family entertainment options, from bowling alleys to soft play centres, trampoline parks and climbing walls.

Notably, **three bowling alleys** operate within the catchment:

- **Disco Bowl Nottingham (12 mins)** offers bowling from **£9.50 for adults** and **£8 for juniors**, with additional activities including mini golf and karaoke.
- **Roxy Lanes (15 mins)** provides a social gaming experience with bowling priced around **£10**, alongside American pool, batting cages, karaoke and basketball courts.
- **Tenpin Nottingham (21 mins)** offers bowling from **£9.25** and also features an arcade, karaoke, and an escape room experience.

Slightly further afield is **Hollywood Bowl Derby (42 mins)**, a popular regional destination with adult bowling from **£7.30** and amusements.

For indoor climbing, **three climbing centres** serve the area:

- **Depot Climbing (10 mins)** offers sessions from **£11 for adults**.
- **Nottingham Climbing Centre (16 mins)** provides a more traditional climbing gym set-up, with prices from **£12**, and amenities like an equipment shop and training courses.
- **Clip 'n' Climb Nottingham (22 mins)** appeals to families and groups with prices around **£16 per session** and options for school and fitness events.

The **soft play and role-play market** is well served, however **locally to Carlton Forum Leisure Centre** is lacking.

- **Planet Bounce Inflatable Park (13 mins)** provides inflatable play sessions for children and adults from **£16.00**, with SEN sessions available.
- **Tiny Town Adventures (16 mins)** offers role-play experiences for children aged 1–7 at **£6.50 per child**.
- **Tumble Town Play Centre (11 mins)** offers combined soft play and roleplay options from **£4.75 to £10**, with wheelchair access.
- **Fun Valley Nottingham (9 mins)** and **Pirates Play, Party & Laser Centre (13 mins)** also serve this market with pricing from **£1–£11.20**, both offering baby changing, SEN sessions, and character events.

Additional options include **Laser Tag Nottingham (11 mins)** at **£6 per person**, **RedKangaroo Trampoline Park (25 mins)** with varied session pricing around **£16**, and **Mousetrap Soft Play (19 mins)**, offering toddler and junior areas at **£7.50 per child**.

Competition Analysis

8.7 Overview of the local market | Play

The below table highlights Carlton Forum Leisure Centre's closest play competitors (by drive time).

Site Name	Address	Distance (minutes)	Facility type	Admission fee	Children's parties	Tag Arena / Laser tag	Bowling	Additional features	F&B
Fun Valley Nottingham	Unit 11-14 Armitage, Business Park Private road No3 Nottingham NG4 2BA	9	Soft play centre	Adults £1.50; 0-4 years £8.70; 5+ years £11.20; Under 12 months £3.75 or free with paying sibling	Yes	No	No	Free parking Free wifi Baby changing	Yes
Depot Climbing Nottingham	4 King Edward Street Nottingham NG1 1EU	10	Climbing centre	Adults £11; Under 18 £8; Under 5's free	No	No	No	Training sessions Equipment hire Equipment shop	No
Laser Tag Nottingham	22 Cranbrook Street Nottingham NG1 1ER	11	Laser tag centre	£6 per person	Yes	Yes	No	Private arena hire	No
Tumble Town Play Centre	107b High Street Arnold Nottingham NG5 7DS	11	Soft play and role play centre	Soft play only 6 - 23 months £4.75; Soft play only 2-8 years £7.50; Soft play and roleplay up to 6 years £10; Babies £1; Adult £1.75	Yes	No	No	Wheelchair accessible	Yes
Disco Bowl Nottingham	Belward Street Nottingham NG1 1JZ	12	Bowling alley	Adult £9.50; Junior £8	Yes	No	Yes	Mini golf Karaoke	Yes
Planet Bounce Inflatable Park	153-155 Huntingdon Street Nottingham NG1 3NL	13	Inflatable amusement park	Under 1 year free; 5 years and under £7.50; Under 8 years £16; 8-15 years £16.00; 16+ years £16.00	Yes	No	No	SEN sessions	Yes
Pirates Play, Party & Laser Centre	41 Rowley Drive Nottingham NG5 1GD	13	Soft play centre	Under 6 months £1; 6 months - 3 years £5.50; 4 - 11 years £6.50; Adults £1	Yes	Yes	No	Build-a-bear style facility; Adults only events; Baby and toddler sessions; SEN sessions; Baby changing; Wheelchair accessible	Yes
Roxy Lanes	The Pod 12 Bottle Ln Nottingham NG1 2HL	15	Bowling alley	Prices vary depending on session; Bowling £10	Yes	No	Yes	American pool tables Batting cage Basketball Karaoke Tech darts	Yes

Competition Analysis

8.8 Competitors - Play

Fun Valley Nottingham

Soft play centre – 9 mins drive from CFLC

- Adults £1.50; 0-4 years £8.70; 5+ years £11.20; Under 12 months £3.75 or free with paying sibling
- Offers children's parties and F&B
- Offers free parking, free wifi and baby changing



Depot Climbing Nottingham

Climbing centre - 10 mins drive from CFLC

- Adults £11; Under 18 £8; Under 5's free
- No children's parties or F&B
- Offers training sessions, equipment hire and equipment shop



Laser Tag Nottingham

Laser tag centre – 11 mins drive from CFLC

- £6 per person
- Offers children's parties
- No F&B
- Offers private arena hire and equipment shop



Competition Analysis

8.9 Competitors - Play

Tumble Town Play Centre

Soft play and roleplay centre – 11 mins drive from CFLC

- 6-23 months £4.75; 2-8 years £7.50; Babies £1; Adult £1.75
- Offers children's parties and F&B
- Wheelchair accessible



Disco Bowl Nottingham

Bowling alley – 12 mins drive from CFLC

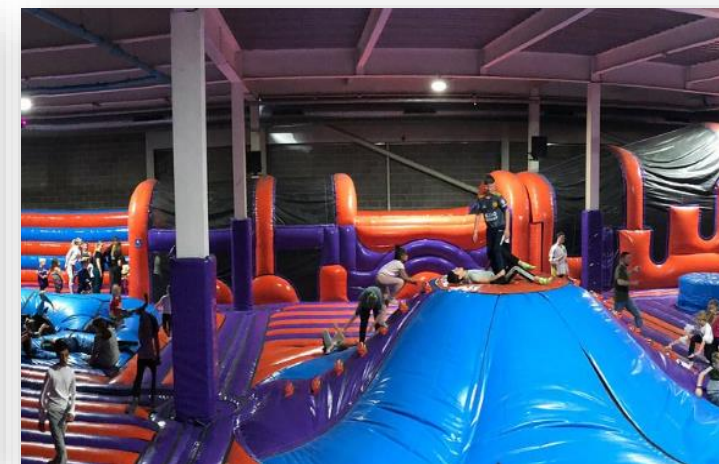
- Disco Bowl Nottingham
- Offers children's parties and F&B
- Offers mini golf and karaoke



Planet Bounce Inflatables Park

Inflatable amusement park – 13 mins drive from CFLC

- Under 1 year free; 5 years and under £7.50; Under 8 years £16; 8-15 years £16.00; 16+ years £16.00
- Offers children's parties, F&B and SEN sessions



Competition Analysis

8.10 Competitors - Play

Pirates Play, Party & Laser Centre

Soft play centre – 13 mins drive from CFLC

- Under 6 months £1; 6 months - 3 years £5.50; 4 - 11 years £6.50; Adults £1
- Offers children's parties, F&B and laser tag
- Offers numerous additional facilities



Roxy Lanes

Bowling alley – 15 mins drive from CFLC

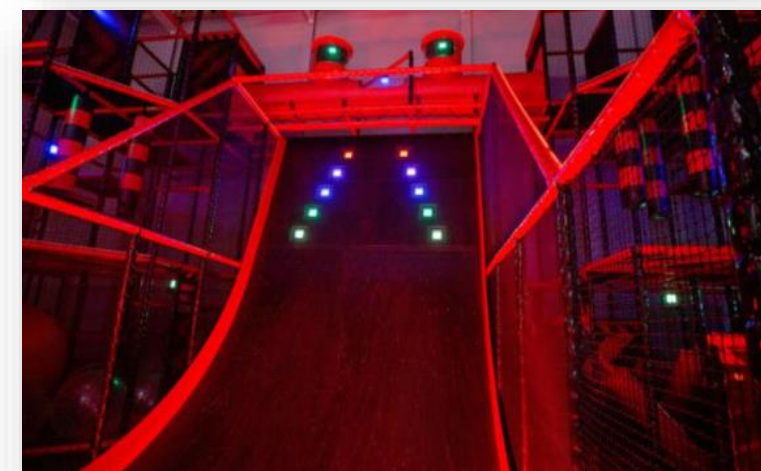
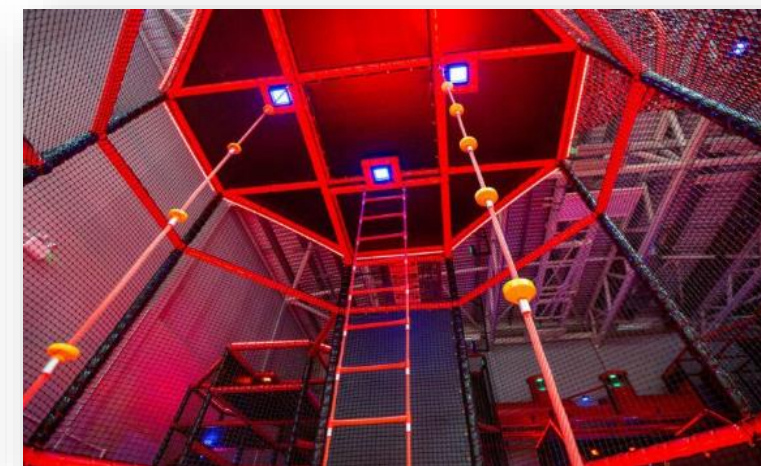
- Prices depend on session – approx £10 per person
- Offers children's parties and F&B
- Offers numerous additional facilities



TAGactive, Lammas Leisure Centre

Leisure centre – 35 mins drive from CFLC

- £6.25 per person
- Offers children's parties and F&B
- Various other facilities in Leisure Centre



Competition Analysis

8.11 Competitors - Padel

Nottingham Padel Centre

13 mins drive from CFLC

- ◆ £24 per court
- ◆ 4 courts available
- ◆ Kit hire available on-site



We Are Padel Derby

38 mins drive from CFLC

- ◆ Approx £50 per court
- ◆ 11 courts available
- ◆ Kit hire available on-site

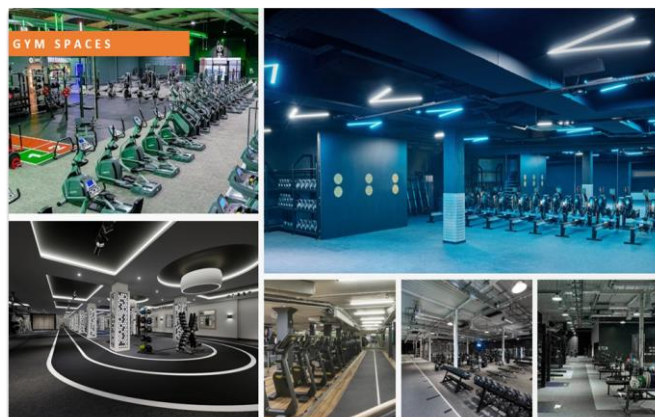


The Opportunity

9.2 Suggested CORE Product Mix | New Carlton Forum Leisure Centre

CORE FACILITIES

130 Station Gym



Studio (45 person)



Studio (30 person)



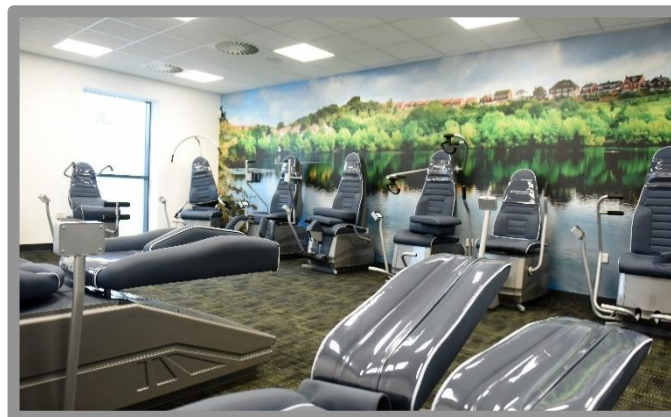
Cycling (20 person)



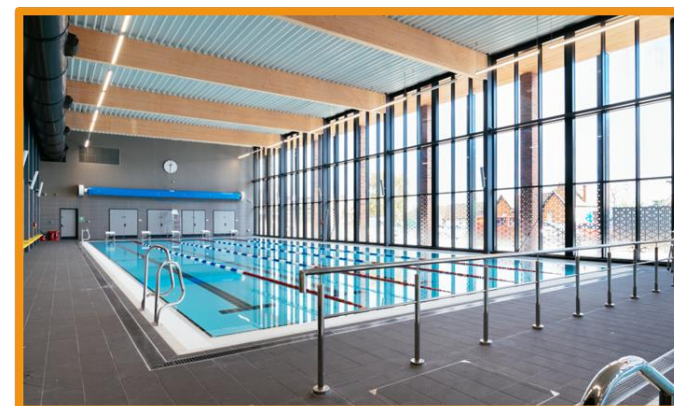
Café linked to reception



Power Assisted Exercise (Active Ageing)



8 lane x 25m main pool



8m x 10m learner pool



Community Room

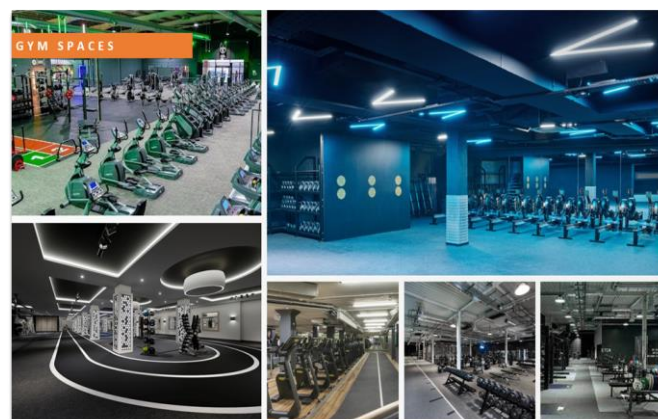


The Opportunity

9.3 Suggested CORE PLUS Product Mix | New Carlton Forum Leisure Centre

CORE FACILITIES

130 Station Gym



Studio (45 person)



Future Studio (30 person)



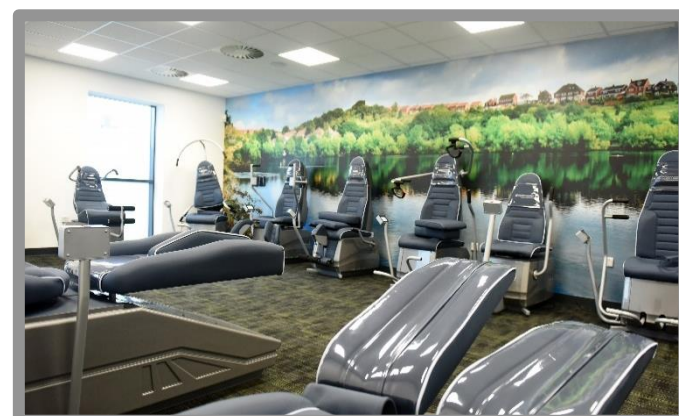
Immersive Cycling (35 person)



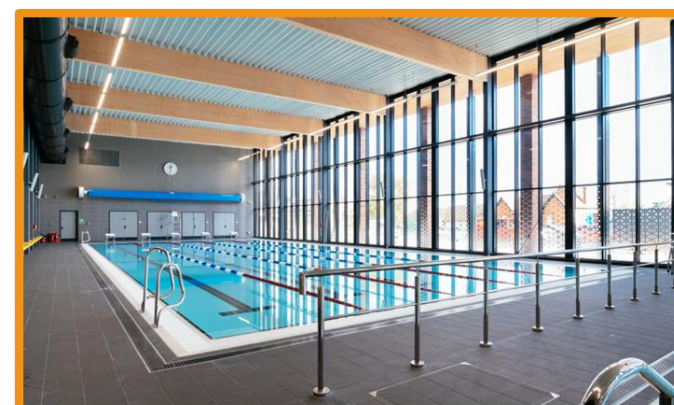
Café linked to reception



Power Assisted Exercise (Active Ageing)



8 lane x 25m main pool



Vario Pool (Moveable floor, splash pad and teaching pool)



Community Room



Soft Play



Padel



Product Solutions

10.1 Product Solutions | Gym

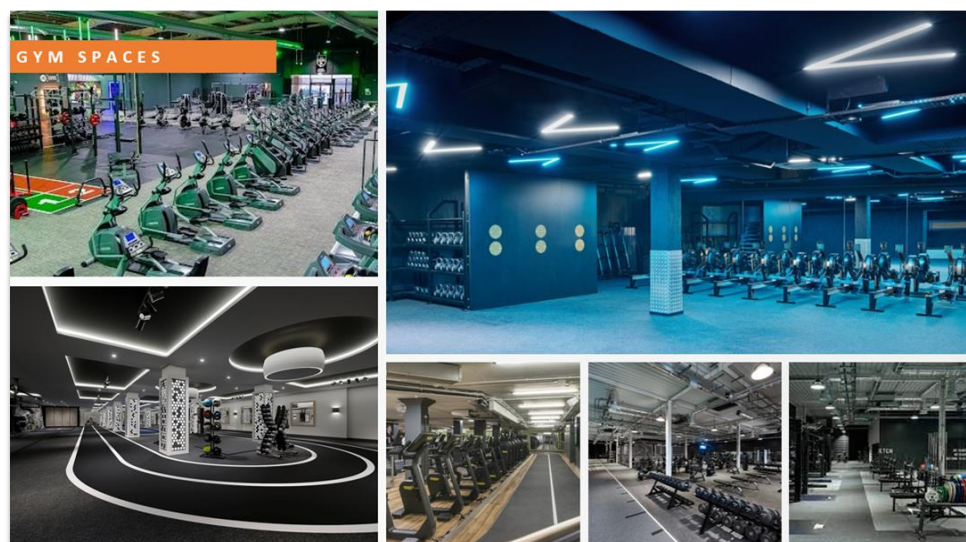
Gym

Developing a modern, fit-for-purpose fitness space is more than choosing an equipment supplier and picking some free weights. Creating a welcoming environment with the appropriate levels and types of equipment will see happier customers achieving their fitness goals.

Gym spaces can be zones to accommodate a variety of users with a variety of training needs, from boxing stations and functional spaces to more traditional cardio and strength equipment.

Based on the research and analysis detailed within this report we would recommend the following considerations for any future development of the Fitness offering at Carlton Forum Leisure Centre.

We would recommend a c130 station/space offering to protect current levels and support with total member level opportunity of around 3,600. This equates to 35 members per station/space based on full membership capacity) This allows an increased capacity from existing provision and space to grow membership while maintaining sufficient space for a quality exercise experience.



example station/zone mix could look something like

Cardio - 30% of total space

- Include self-powered equipment to minimise energy costs and increase flexibility on layout
- Include performance/connected ranges

Strength – 40% of total space (broken down into)

- Pin operated strength, 40%
- Plate loaded strength, 20%
- Cables ,10%
- Platforms/racks, 10%
- Free weights, 10%

Functional/ HIIT zone - 15% of total space

- Used as gym floor class space as well as free use
- Functional Rig
- Small equipment
- Track/sled track
- Instructional Digital Screens

Boxing zone - 5-10% of total space

- Punchbags
- Box 12 Pods

Stretch/Core/Recovery – 5-10% of total space

- Fixed matting
- Small mobility/core equipment
- Exercise Guidance

Consultation/member areas

- Consultation space
- Body composition scales
- Member notice board
- Hydration/Sanitation stations



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Cardio



Strength



Functional



Boxing



Recovery



Consultation

Product Solutions

10.2 Fitness Members-Per-Station

Members-Per-Station

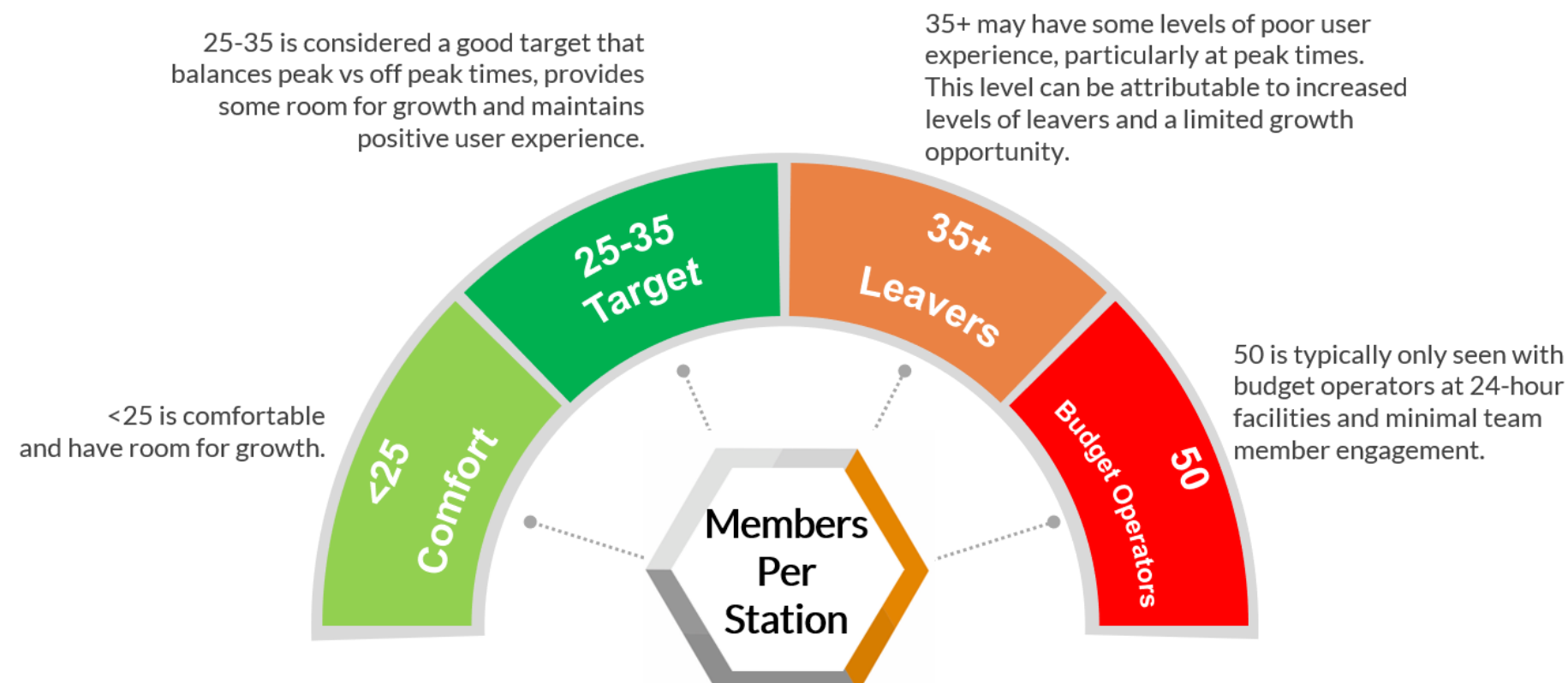
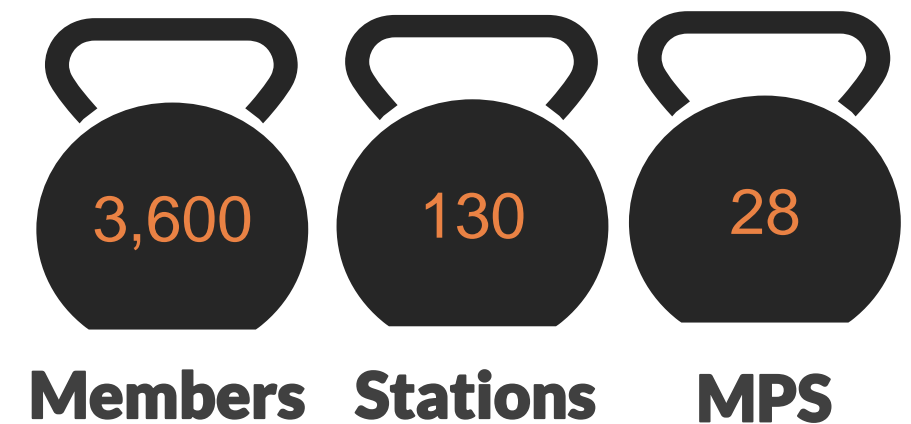
The UK leisure industry uses a member-per-station indicator across a range of facilities and products. This provides a benchmark when considering user experience and commercial opportunity.

Typically, a public leisure centre offering would target a members per station of between 25-35.

Based on the fitness demand assessment and ALS expectation, we would suggest gym stations of c130 to meet the expectation and cater for future growth opportunities.

Opportunity

Based on the fitness demand assessment and ALS expectation, we would suggest gym stations of c100 to meet the expectation and cater for future growth opportunities.



Product Considerations

10.3 Gym Design

Functional Fitness

Functional fitness areas are spaces designed for individuals to perform exercises that target multiple muscle groups and improve overall physical performance. These areas typically include equipment such as kettlebells, medicine balls, resistance bands, rigs, and TRX suspension systems.

Understanding your target audience will help decide how much floor utilisation is required for your functional training space.



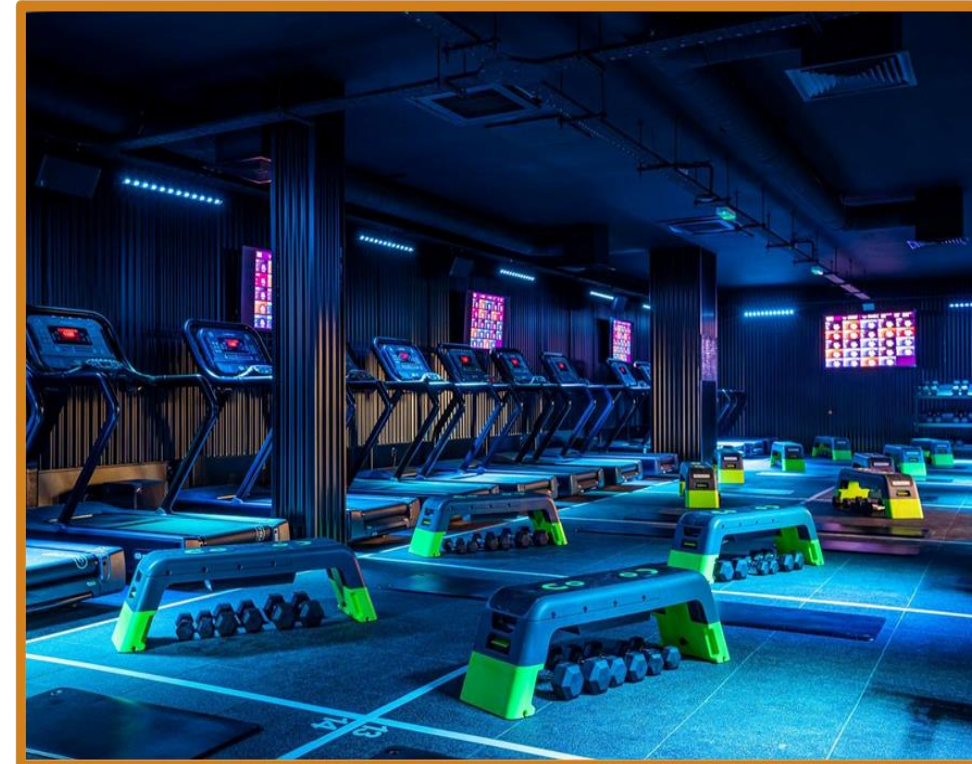
Boutique Fitness

Boutique fitness studios have become increasingly popular in the UK, offering a more personalized and upscale fitness experience compared to traditional gyms.

These studios typically specialize in specific exercise disciplines such as yoga, Pilates, or high-intensity interval training. They offer a more intimate and exclusive atmosphere, with smaller class sizes, specialized equipment, and highly trained instructors.

While often more expensive than traditional gym memberships, boutique studios cater to a growing demand for high-quality fitness experiences.

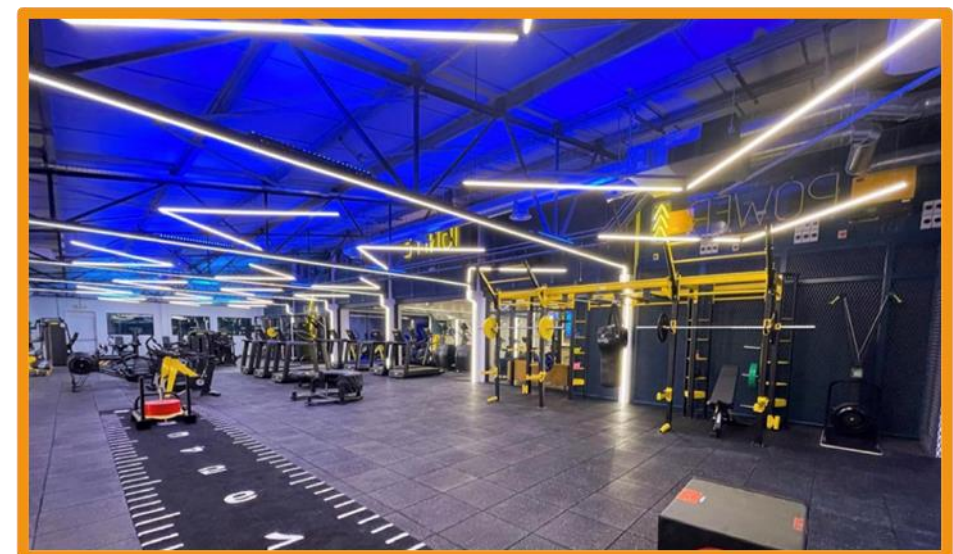
UK-based examples include Trib3, Barry's, Graft Haus, Cave Fit, Blok Box Clever, F45 and 1Rebel.



Innovative Design

Attracting new customers and motivating your existing ones, can all be enhanced by high quality innovative design features. This can include lighting features, clever use of floor space, wall art and projection graphics.

But good quality design shows through when all areas complement each other to emphasise the organisation's brand and values.



Product Considerations

10.4 Studio Spaces

Creating Innovative Studio Spaces

Attracting new customers and motivating your existing ones, can all be enhanced by high quality innovative design features within the group exercise spaces.

This can include lighting features, clever use of floor space, wall art and projection graphics.

Memorable Experiences

Creating memorable fitness experiences involves going beyond traditional workouts to engage participants on a deeper level. This can include incorporating innovative training techniques, music, lighting, and social activities that foster a sense of community and connection among participants.

And this goes beyond design and physical features to also include personalised attention, encouragement, and positive reinforcement from instructors.

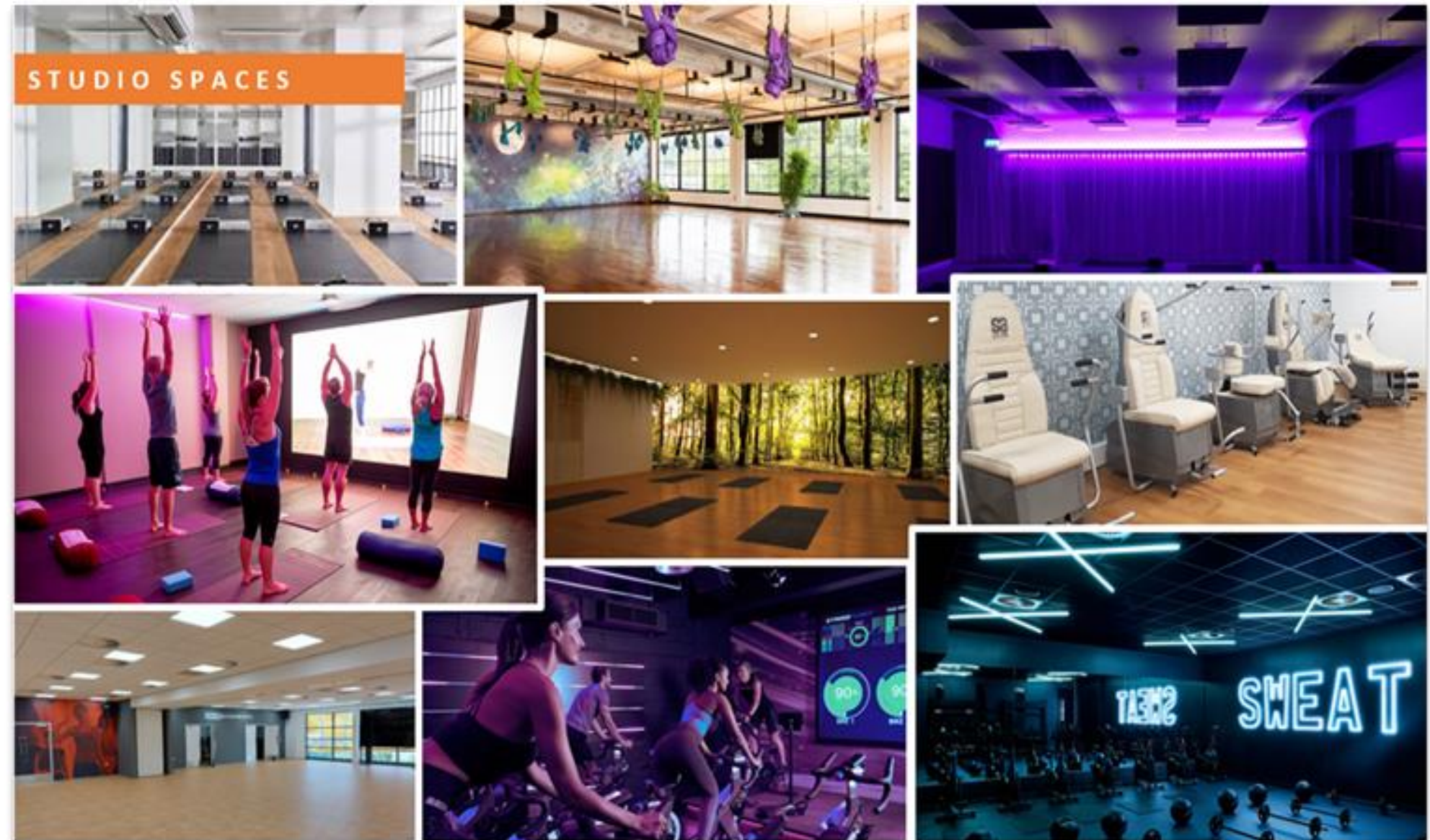
Creating a fun, welcoming, and inclusive environment can leave a lasting impression and keep participants coming back for more.

Welcoming Environments

Often creating a more intimate and community-oriented atmosphere than traditional gyms, your studio spaces can offer something to all users from yoga and Pilates to indoor cycling and HIIT workouts.

Studios can either be a dedicated space created around a specific genre, or they can be multi-functional allowing a variety of activities to take place

DEMAND MEETS INNOVATION



Product Considerations

10.5 Product Solutions | Future Studio



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Immersive Feature Studio (Future Studios)

Future Studios is a 360 immersive studio experience. You can turn your space into anywhere, a dojo for martial arts classes, a chilled-out forest for yoga or a high intensity body pump class! You can even Host kids' birthday parties with animated balloons or transform it into an old ballroom to support local dementia patients and charities.

- Exercise classes
- Community events
- Meeting/corporate events
- Birthday parties
- Arts and Crafts
- Merchandise area
- Birthday parties
- Bespoke events
- Immersive art experiences
- Martial arts
- Dance workshops
- Ballroom for dance (Dementia friendly)
- Sensory rooms (SEN Children)

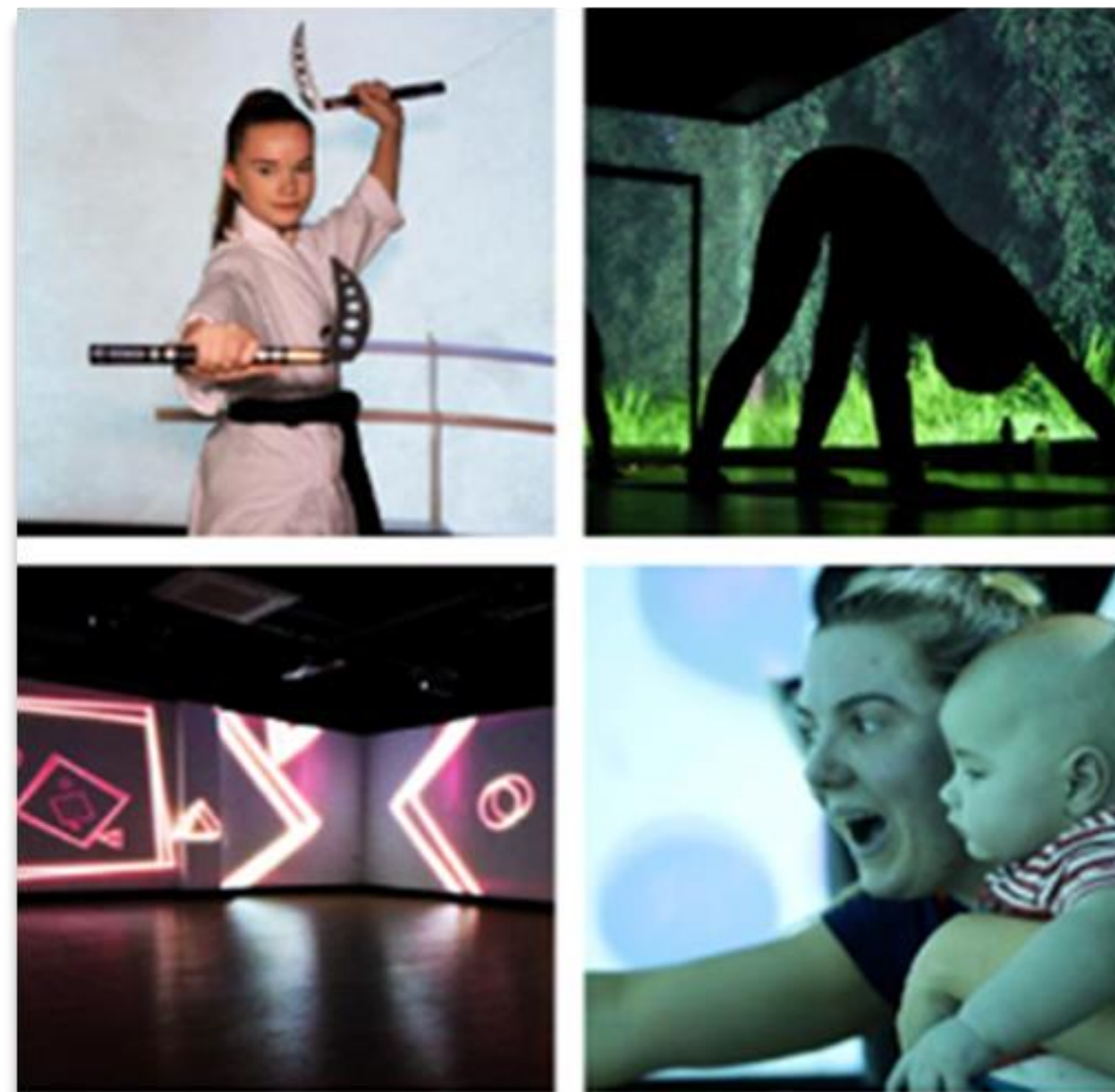
Inclusive and Immersive Experiences

This technology creates all-inclusive experiences for as many different communities as desired.

Utilising large and often underused spaces we work with not only the active community, but as many different people across a multitude of demographics to captivate them to visit our facilities/



Flexible
Space



Innovative
Solution

Product Considerations

10.6 Product Solutions | Studios

BOX12

BOX12 is a 36-minute workout consisting of 12, 3-minute rounds that combine boxing and functional fitness exercises.

Sessions are guided by staff who will inspire members to achieve and learn the basics of fitness boxing combined with functional exercises.

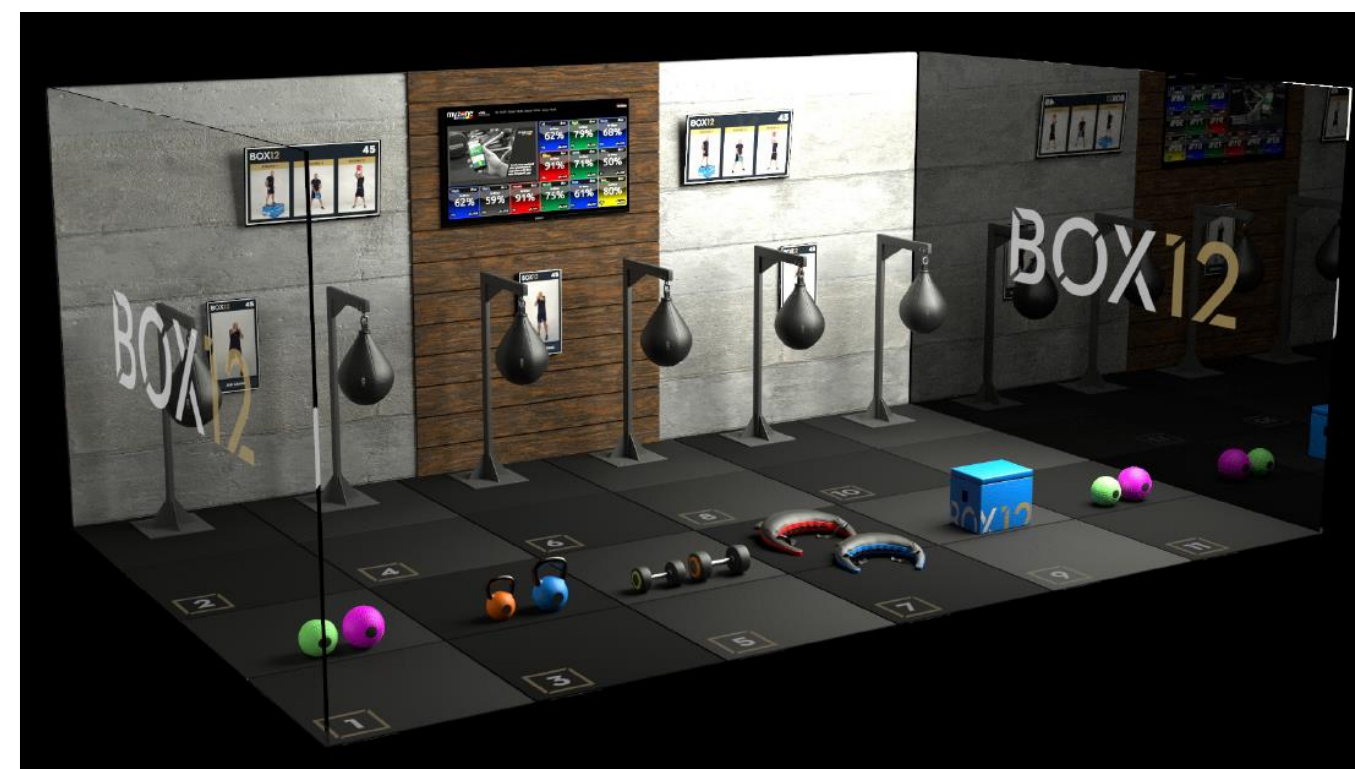
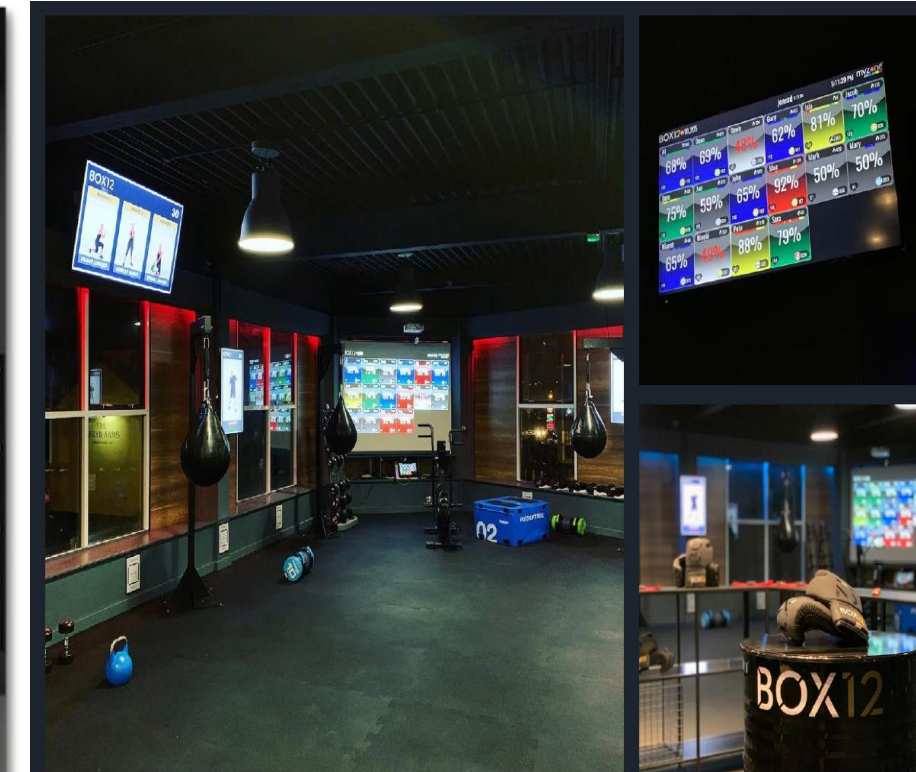
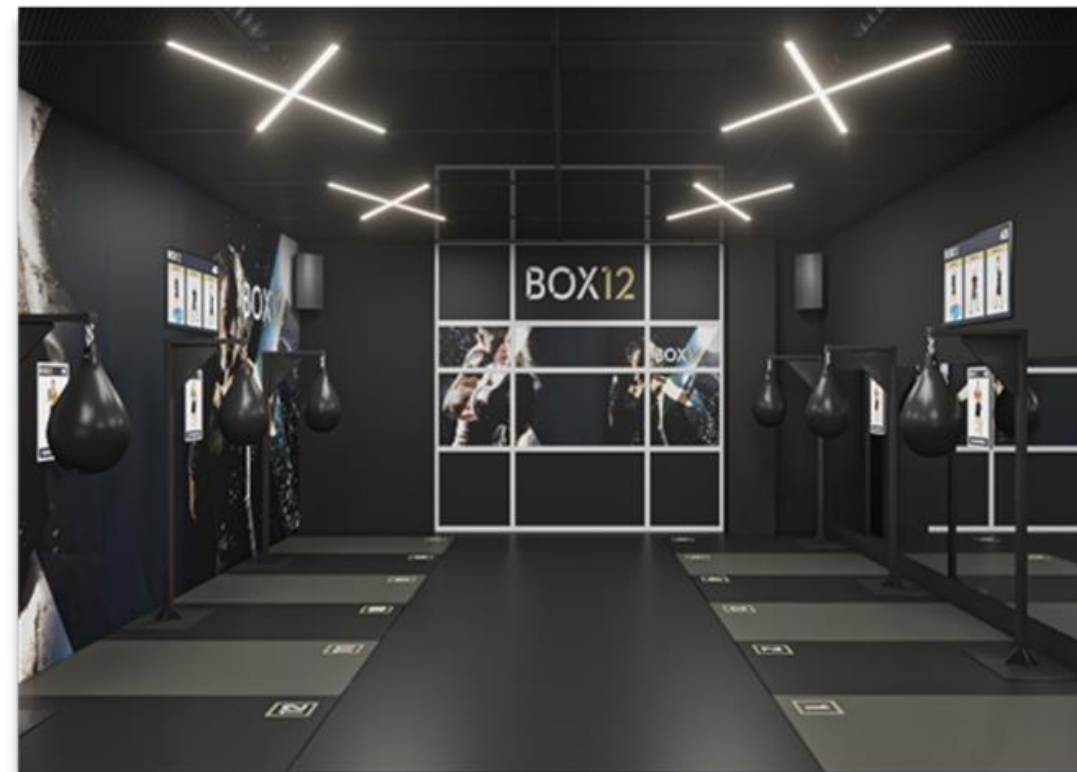
Workouts are tailored to various fitness level using integrated and wearable Myzone technology, providing real-time feedback.

Typical User

- Gender Ratio
 - 51% males, 49% Females
- Average age: 38.5
- Fitness Experience – Average
- Boxing Experience – Negligible

Requirements

- Space requirement is 80sqm for circuit
- 110sqm for circuit and small group training
- BOX12 has a clear focus on delivering a high quality experience and varied, effective workouts
- Lean staffing model and low running costs make the in club model highly profitable
- BOX12 in club model is designed to provide the operator with a tech-focussed circuit based fitness boxing offering that will supersede and therefore remove the competition of 9Round and 12RNDs.



Male & Female Appeal

Product Considerations

10.7 Product Solutions | Reformer Pilates

Reformer Pilates

Reformer Pilates is a full-body workout that combines traditional Pilates movements with the use of a specialized machine called the Reformer.

The reformer is a brilliant way of developing a strong core, strengthening muscles in your hips, quads, glutes, and shoulders. It's also great for building power, flexibility, balance and better posture. It's a low-impact full-body workout to build a more functional and efficient engine, and regular practice can even improve the quality of other workouts like strength training.

Typical User

- Gender Ratio
 - 20% males, 80% Females
- Age 24-59
- Fitness Experience – Suitable for first time users
- Affluence: Generally higher level of affluence

The Reformer

A bed-like machine with a flat platform called the carriage, springs, ropes, and a foot bar. The carriage rolls back and forth on wheels within the frame and is attached to one end by springs. The springs can be adjusted to increase resistance and suit your fitness level.

Benefits

Reformer Pilates can help improve strength, flexibility, balance, posture, and coordination. It can also help you



Growing
Demand

Product Considerations

10.8 Studios | Feature Studios

Immersive Cycling studio

Experience a world of ice glaciers, jungles and underwater caverns with group cycle class The Trip™ by Les Mills.



See it in action
CLICK HERE

The Trip™ is an innovative cycling fitness class, perfect for thrill-seekers, fun-lovers and anyone that loves a creative approach to exercise. This 40-minute multi-peak cycling workout features a journey through digitally-created worlds, thanks to a cinema-scale screen and cutting-edge sound system.

With ever-developing technology the range of immersive experiences is expanding and can offer more in your studio than just indoor cycling...

Innovative
Solution



HIIT Boutique Studio

- Feedback technology such as Myzone
- Consider unique products like Box 12

Boutique fitness studios have become increasingly popular in the UK, offering a more personalized and upscale fitness experience. These studios typically specialize in specific exercise disciplines such as yoga, Pilates, or high-intensity interval training. They offer a more intimate and exclusive atmosphere, with smaller class sizes, specialized equipment, and highly trained instructors.

Growing
Demand



Product Considerations

10.9 Active Ageing Studios

Active Ageing

Power assisted exercise technology provides a ‘helping hand’ in a low impact, full-body workout circuit for exercisers who demand to work smart and effectively.

Power assisted exercise solutions attracts older adults, those living with long term conditions and also people who are intimidated by a traditional gym environment to leisure and rehabilitation centres. Power assisted exercise is safe for all age groups and abilities, as users do not need to provide the motive force to overcome inertia.

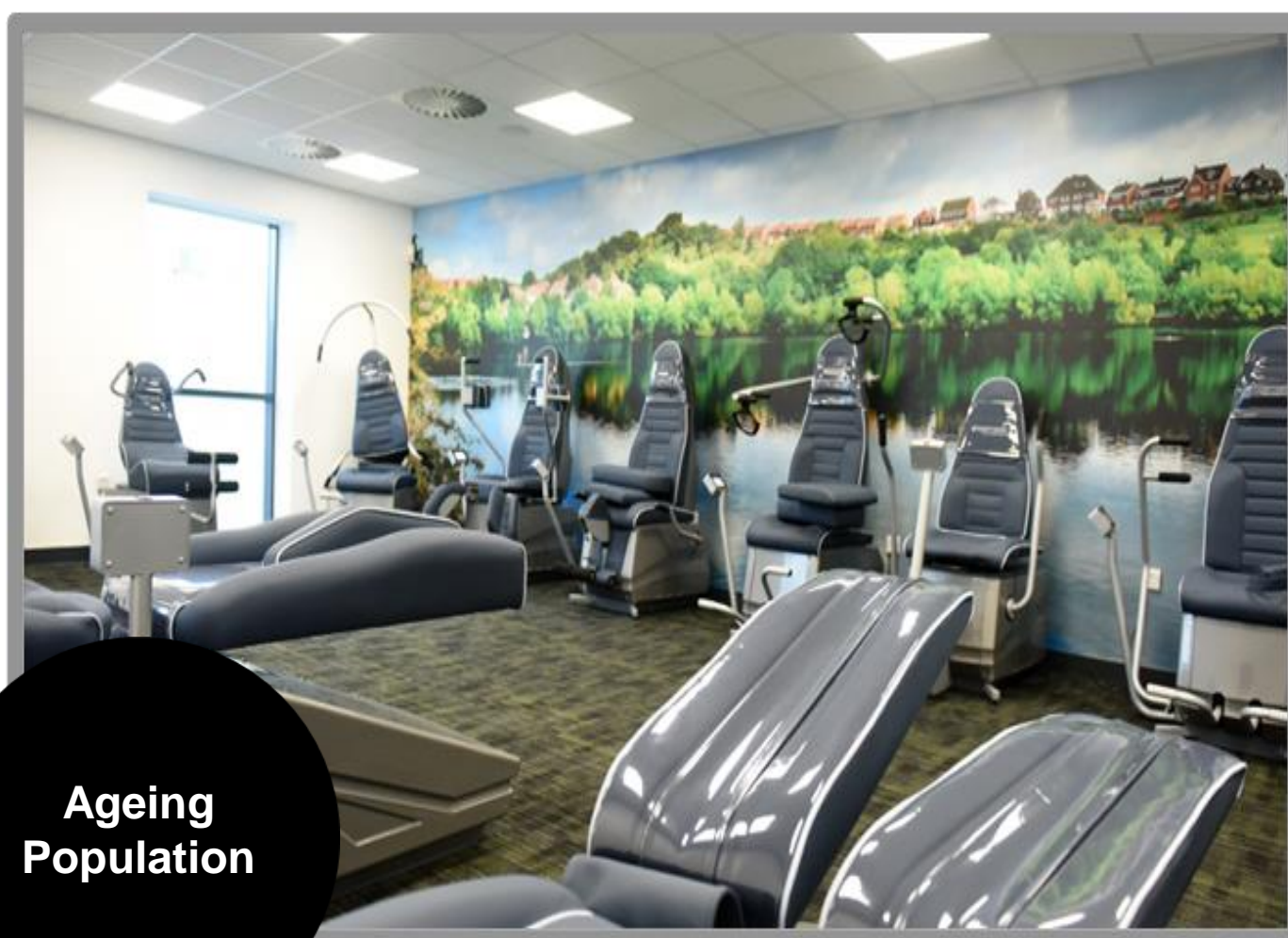
A power assisted wellness suite could provide the development with revenue opportunities in addition to aligning with wider social value objectives.

Target Users

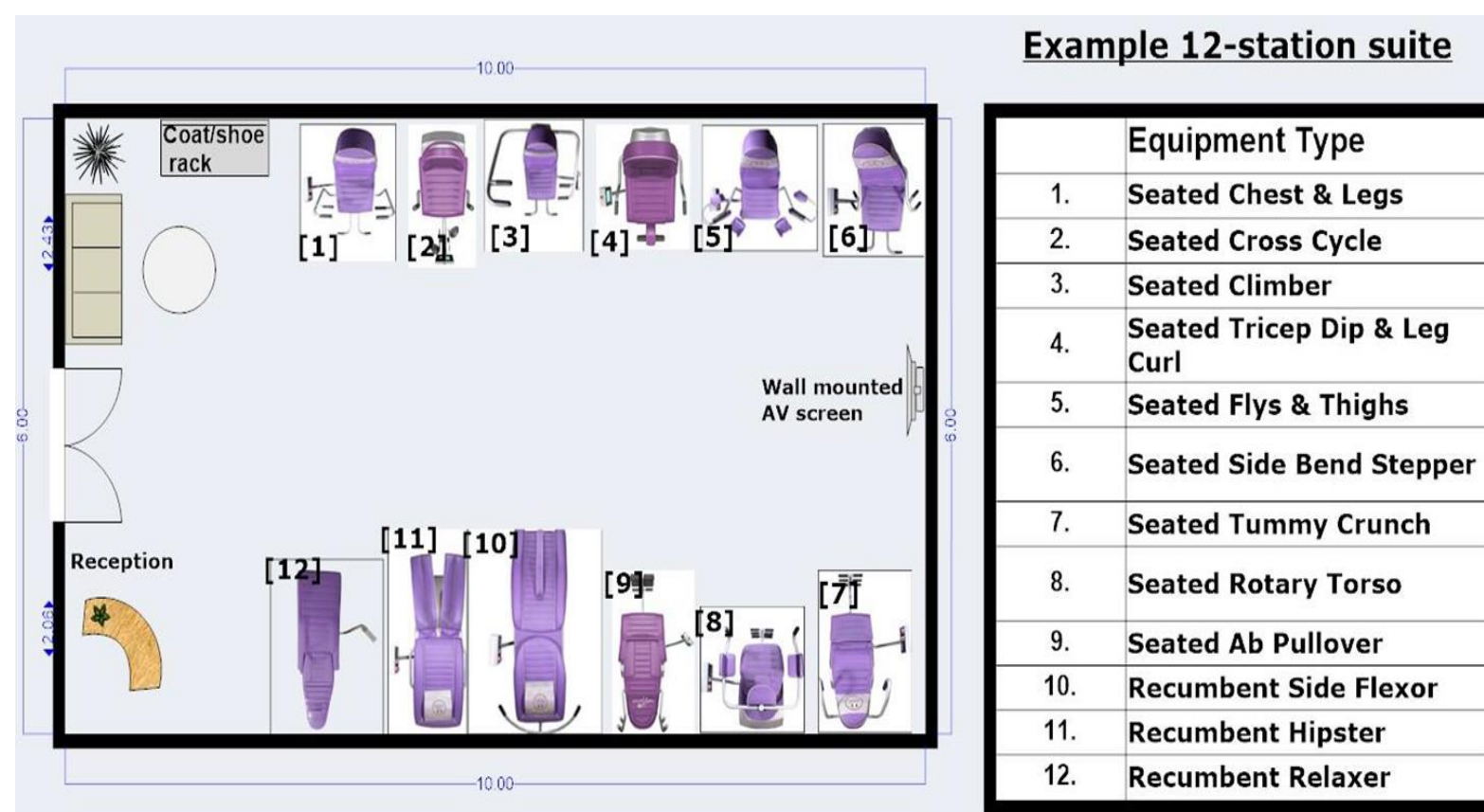
- The over 60s – the active ageing market
- People living with disabilities, poor mobility or long-term health conditions
- Anyone who feels intimidated by a traditional ‘gym’ environment and wants to try a different and fun way to exercise

Benefits Include

- Health – Physical & Mental, building a future resilience
- Longer term independence for older adults –improved mobility, balance and confidence
- Reduces social isolation and improves quality of life



Ageing
Population



Product Considerations

10.10 Product Solutions | Young Children

Soft Play

An imperative part of the consideration when developing Family Entertainment Concepts is the consideration of multi-child families. Whilst it may not be considered a 'primary concept' due to existing supply against demand, having some form of attraction for all ages is a staple of an inclusive family offering.

A play solution not only offers these benefits to children within the community, but it also helps turn the facility into a family destination, which increases dwell time, and adds further revenue potential and commercial gain for the facility.

Family play provision can provide a wide of range of economic and social value. Play is essential to children's physical, mental and social development, health and well-being.



Toy Town – Imagination Play

For families and young people, a dedicated Toy Town area filled with inspirational and imaginative playrooms that entertains the younger ages,

Play is essential to children's physical, mental and social development, health and well-being.

Role play is not just a source of amusement; it plays a vital role in your child's development. It nurtures confidence, creativity, communication, physical growth, and problem-solving skills, making it an invaluable experience.

Rooms could include a Police Station, Fire Station, Vets, Doctor's Surgery, Safari Adventure, Salon, Construction Area, Shop, Café, Park Area and a car garage.



Sensory Rooms

A Multi Sensory Environment is specifically designed to cater for various diversities, including Asperger's, Autism, ADHD, Cerebral Palsy, Down Syndrome and many more. A sensory room is not only a beneficial activity for the local community but improves the wider offering of the facility to help create a destination and provides additional revenue opportunities.



Product Considerations

10.11 Product Solutions | Sports

Padel

Padel is one of the fastest-growing sports in the world.

Padel's an innovative form of tennis that's fun, easy to learn and extremely sociable. Played on an enclosed court about a third the size of a tennis court, groups of mixed ages and abilities can play together.

A padel court is a rectangle that is 10 meters wide and 20 meters long. It is surrounded by walls made of concrete, glass, or wire mesh. The flooring can be made of cement, concrete, wood, or artificial turf. A net with a maximum height of 33cm in the middle and 92 cm at the edges divides the court into two. The service area is within 3 meters from the back wall.

Indoor courts with all four walls made of glass are becoming popular but generally use the same materials as outdoor courts.



Product Considerations

10.12 Product Solutions | Aquatics

Aquatics Innovation

A brand-new development in the design of movable pool floors. These floors increase the profitability of swimming pools by allowing multiple target groups to make use of the pool at the same time.

Movable floor

One of the most important ways to make pools suitable for a variety of target groups is a movable floor that can be set to the required pool depth. It can be used across the entire pool surface or just cover part of the pool. With a movable floor, the pool is transformed into a highly versatile pool surface suitable for a variety of purposes.

Examples include anything from pool exercise for seniors to swimming lessons for toddlers and pre-schoolers. The desire to make the swimming pool more versatile led to the idea for turning swimming pools into recreational areas at will. With this technology, several 25-meter pools with a movable floor can easily be transformed into a recreational landscape or used as a pool for a specific target group to expand an area for toddlers and pre-schoolers, for instance.

Interactive swimming pool floor

Turn your swimming pool into an interactive playground for young and old. The options range from water games to fountains that spray upwards in response to actions from the various games available.

This allows the visitor to interact with the various

designs projected onto the pool floor, drawing them into the game. The pool floor is elevated to about 10 cm below the water surface, after which the projection can begin. A very powerful projector equipped with 3D tracking cameras is placed above the pool, mounted in a special housing.

Innovation through years of development

Area H2O is operated by means of a touch screen located on the poolside.

The system is easy to operate and the games can be started in quick succession. The 3D tracking camera analyses the users' movements and jumps. The game will respond to this and project the image of the game onto the movable floor. As a result, Area H2O comes to life!



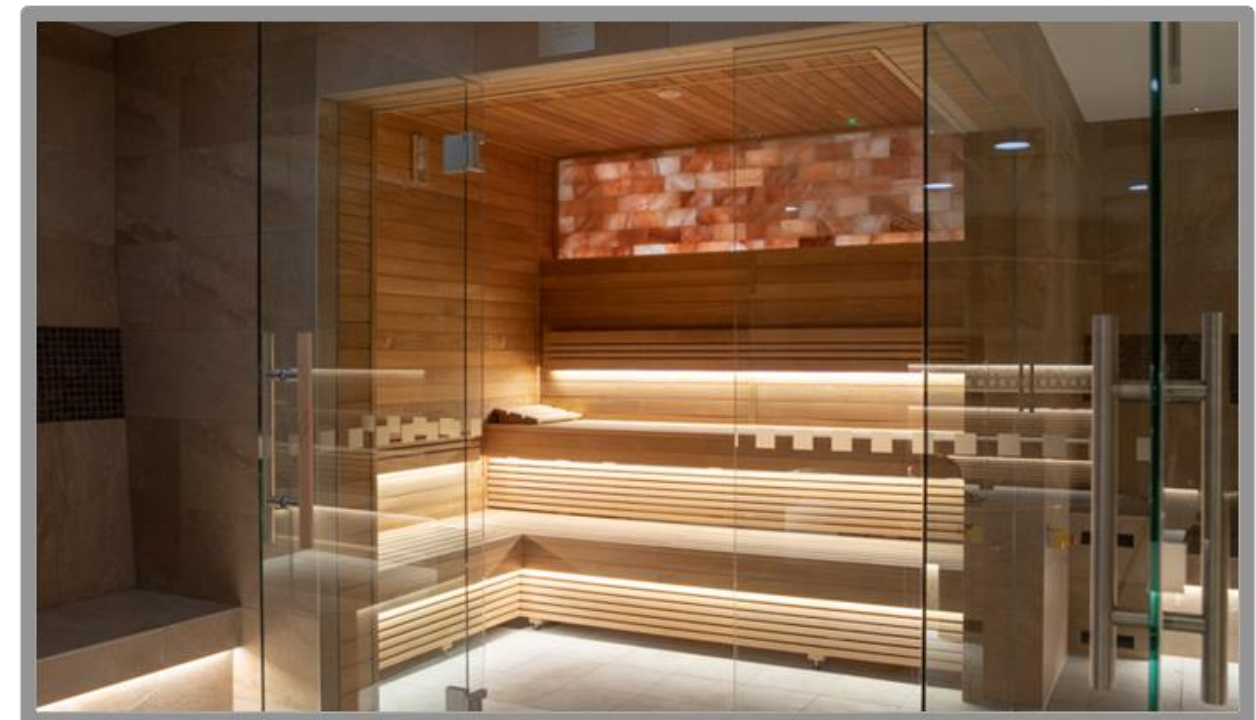
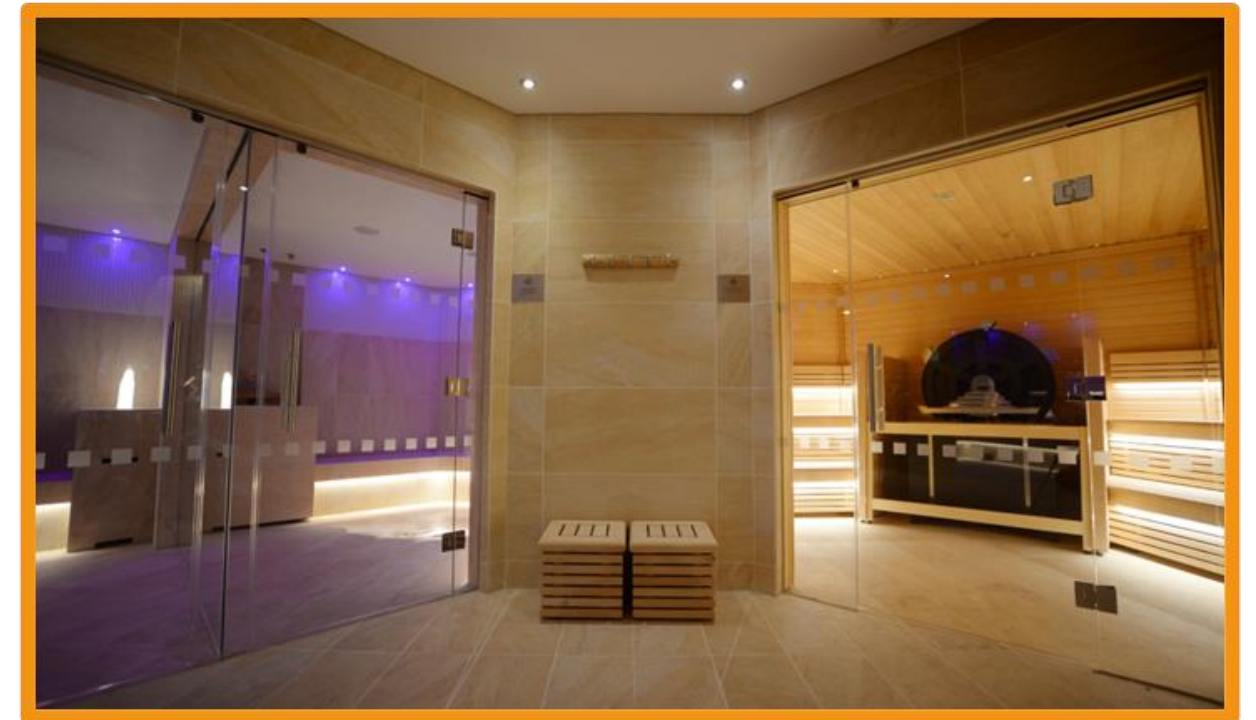
**Unique
Innovation**

Product Solutions

10.13 Product Solutions | Sauna and Steam

Sauna and Steam

Saunas and steam rooms are heat therapies that have been used for centuries to promote relaxation and health. They both involve exposing the body to high temperatures but differ in the way they produce heat. Saunas use dry heat while steam rooms use moist heat. Both can help to improve circulation, relieve muscle tension, and promote detoxification.



Product Considerations

10.14 Product Solutions | Food and Beverage

Food and Beverage

To compliment the indoor leisure solutions, a good F&B offering is vital to maximise on foot traffic, dwell times and increased secondary spend.

Catering options can vary from small serving pods that might specialise in hot beverages and snacks, through to full restaurants offering table service.





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