



## State of the Market Survey 2018

### Sports and Leisure



**Briefing 18-43**

**November 2018**



The state of the market survey was conducted by Rob Bailey, APSE Principal Advisor with assistance from Garry Lee, Research and Coordination Officer.

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## Sports and Leisure

### State of the Market 2018

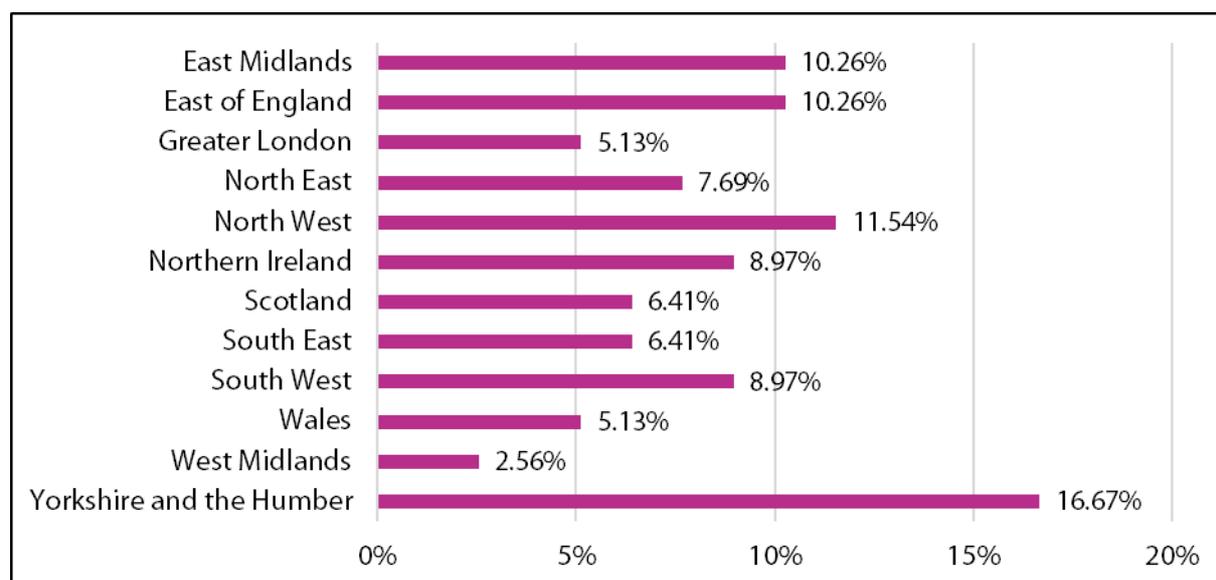
APSE conducted an online survey between May and June 2018. A series of questions were asked covering a range of issues of interest to those officers and councillors responsible for Sports and Leisure services.

State of the Market surveys are an attempt to understand perceptions of the market amongst people directly involved in delivering services.

There were 78 respondents from local authorities to this survey. None of the questions were mandatory, so the total amount of responses differs from question to question. Individual details of respondents have been kept confidential. Results of the survey should be treated as a snapshot of current opinions of those working in sports and leisure services rather than a thorough analysis of change over time.

### Results from the survey

#### 1. Where in the United Kingdom do you work?

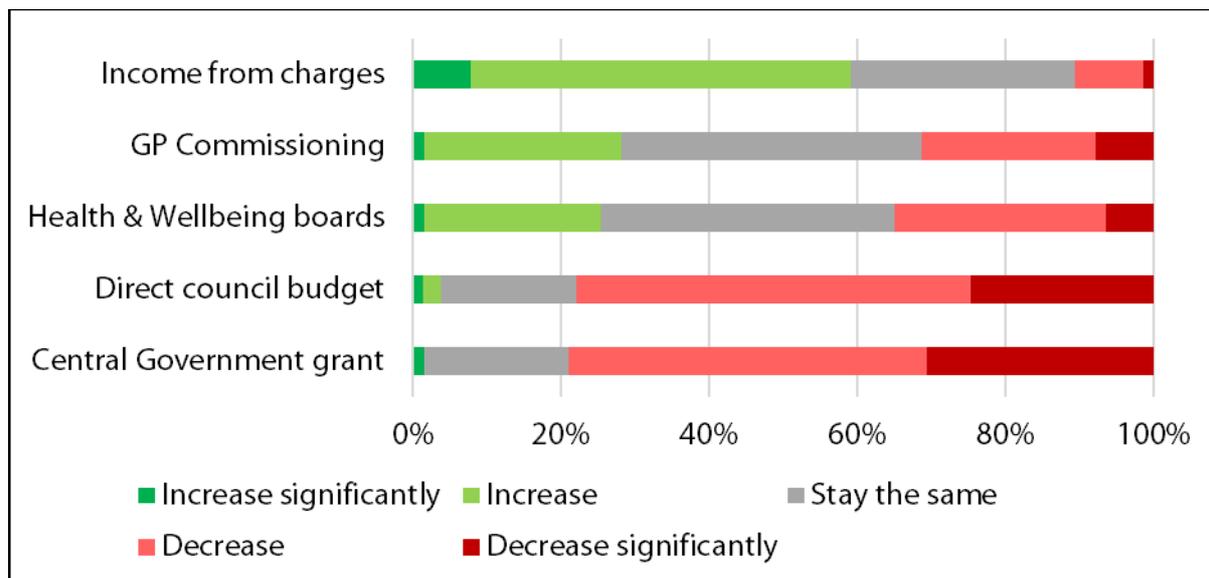


The total sample size was 78, with 62 from England, 7 from Northern Ireland, 5 from Scotland and 4 from Wales.

#### 2. How do you expect the workload of the leisure section to change over the next 12 months?

Of the 78 people that answered this question, 63 (80.77%) believe that their workload will increase during the next year. Only 3 (3.85%) believed that their workload would reduce over the same period.

### 3. How do you expect leisure funding to change over the next 2 years?

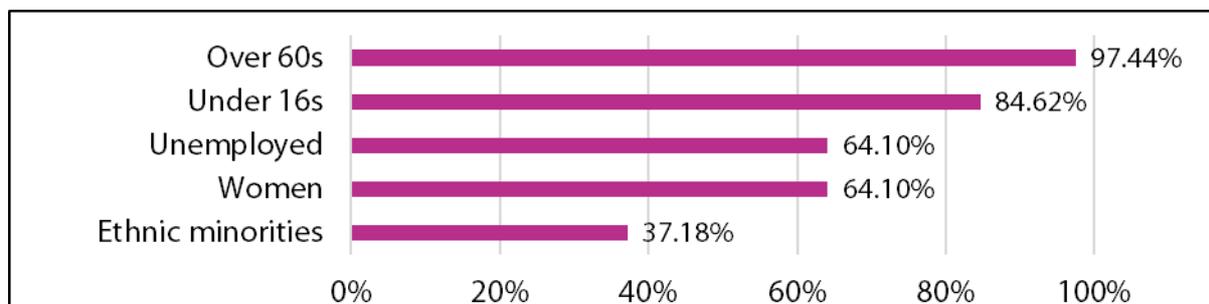


Income from charges was the only area where the majority of respondents (59.21%) expect leisure funding to increase over the next 2 years. 28.13% expected increases in GP Commissioning funding and 25.40% expected increases in funding from Health & Wellbeing boards.

There was a clear majority of respondents that believed the Central Government grant (79.03%) and direct council budget (77.92%) will decrease over the next 2 years. 34.92% also expected decreases in funding from Health & Wellbeing boards and 31.25% expected decreases from GP Commissioning.

The results above suggest that respondents are generally expecting a move away from the traditional mechanisms of funding local government, and a move towards self-reliance from commercialising council sports and leisure services.

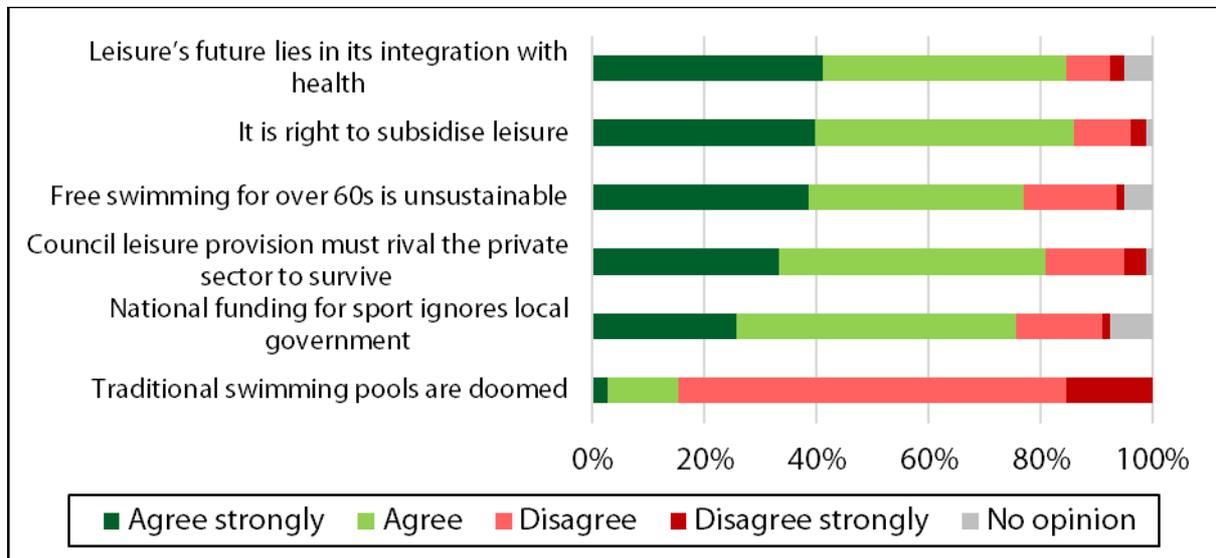
### 4. Do you actively encourage participation from particular groups within the community? e.g. promotions, reduced charges, specific closed sessions etc (please tick all that apply)



The largest group targeted by survey respondents were the Over 60s with a near unanimous result (97.44%). Other groups not identified in the choices above that were

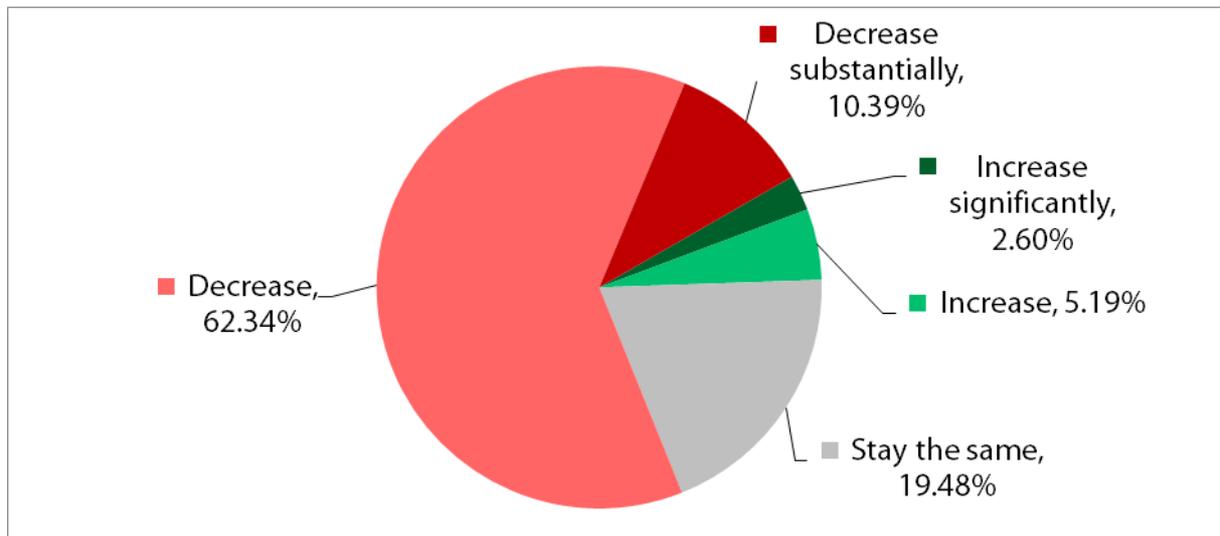
targeted include the disabled, Armed Forces veterans, carers and those with long-term medical conditions. One respondent noted that this activity heavily depends upon the funding pots available to the local authority to do this.

**5. Please give your opinion on the following statements**



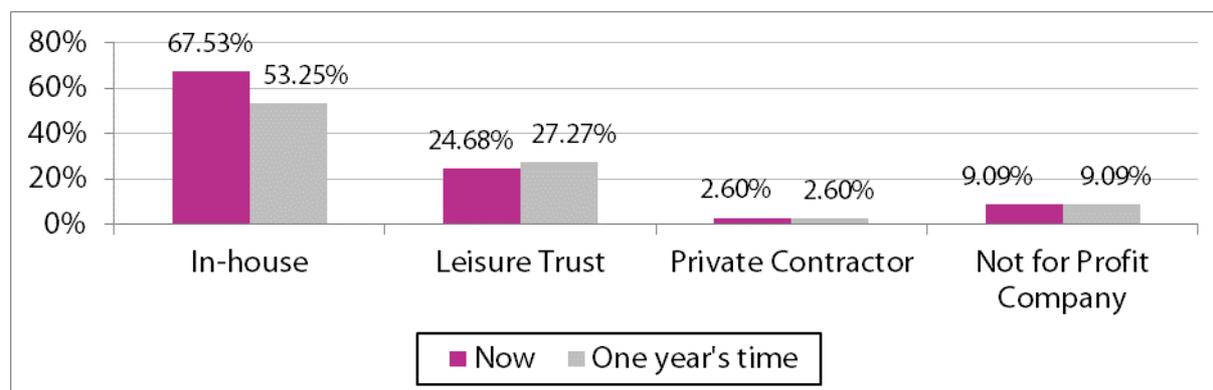
All of the statements above were broadly agreed with by respondents except for 'Traditional swimming pools are doomed'.

**6. Overall, how do you expect the leisure budget to change next year?**



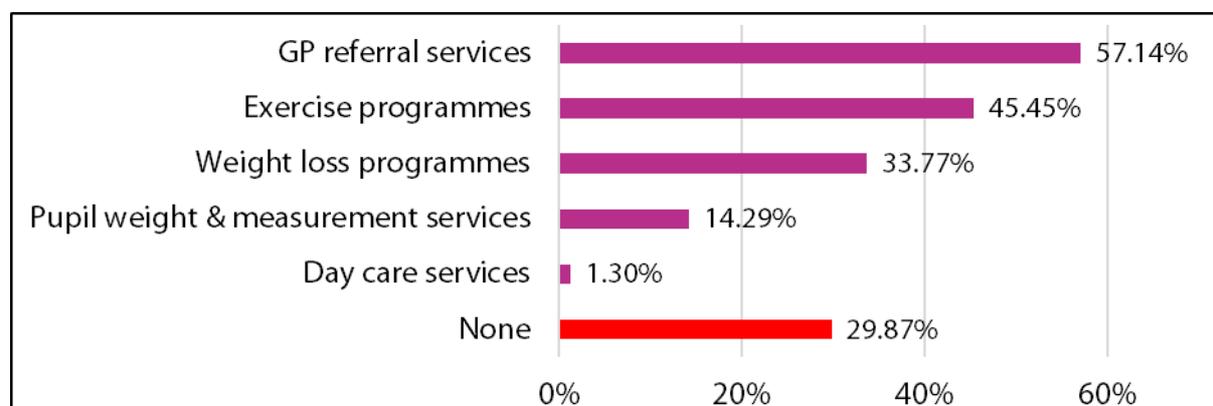
Expectations for next year's leisure budget was poor with 72.73% expecting it to either decrease or decrease substantially. Only 7.79% expected the budget to increase. This was to be expected with the results of question 3 showing that the majority of respondents expected the Central Government grant and direct council budget to decrease or decrease significantly.

## 7. Who manages leisure now and who do you expect to manage it in 12 months time?



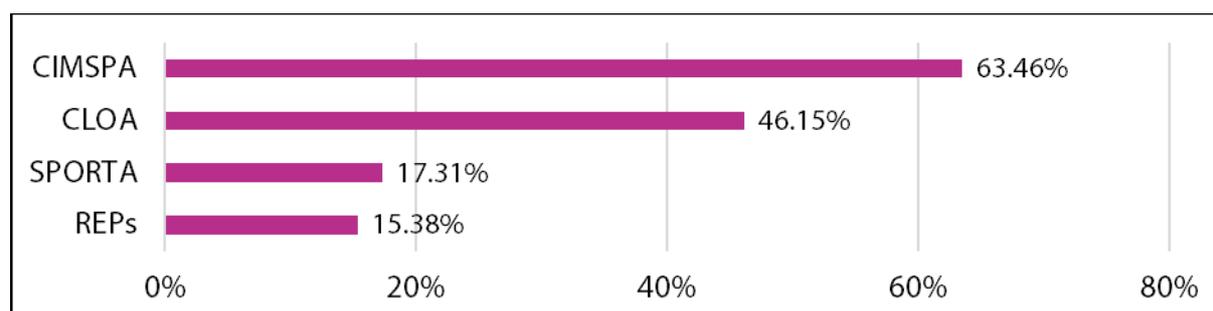
While 67.53% of respondents leisure service is currently managed in-house, 14.28% less people expect it still to be managed in-house in 12 months time. Two respondents commented that this would likely change to a shared service model with a neighbouring authority.

## 8. Have you been commissioned by your local Health Board (CCG or Health & Wellbeing Board etc) to provide any of the following?



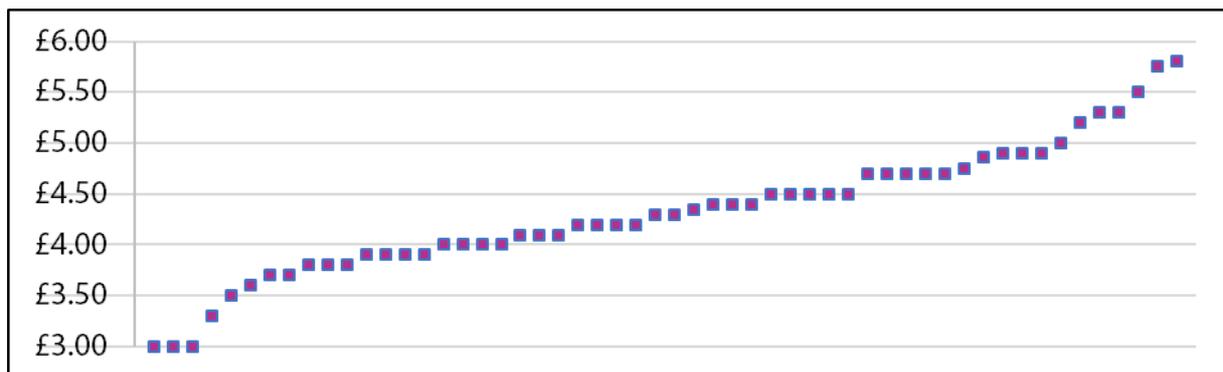
GP referral services (57.14%) were the most commissioned by local health boards, followed by exercise programmes (45.45%) and weight loss programmes (33.77%). Other services mentioned in the comments were for social prescribing, people living with diabetes, falls prevention, stroke rehabilitation and men's weight management.

## 9. Are you a member of any industry governing bodies? (Tick all that apply)



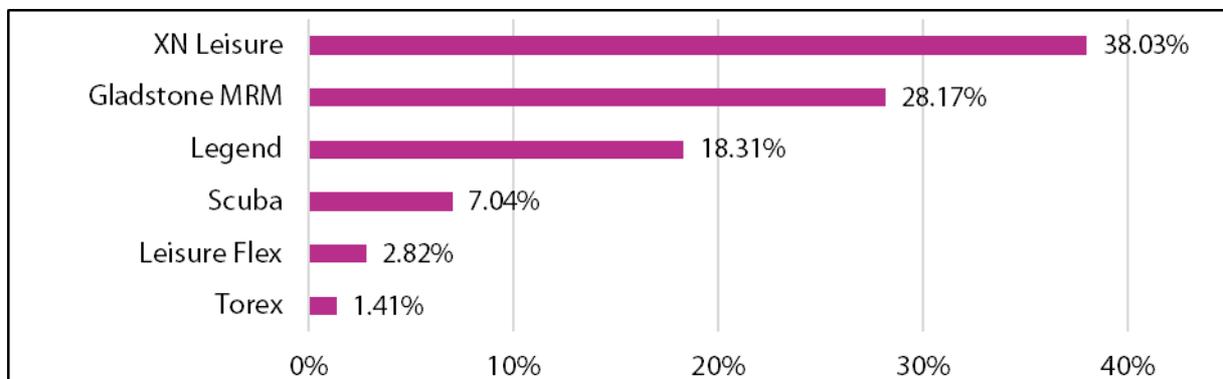
The most common body that respondents were a member of was the Chartered Institute for the Management of Sport and Physical Activity (CIMSPA, 63.46%), followed by the Chief Cultural & Leisure Officers Association (CLOA, 46.15%), SPORTA (17.31%) and the Register of Exercise Professionals (REPs, 15.38%). Other bodies included VOCAL, the Institute of Swimming, Swim England and the Royal Life Saving Society UK.

### 10. What is the charge (if applicable for a single adult swim)?



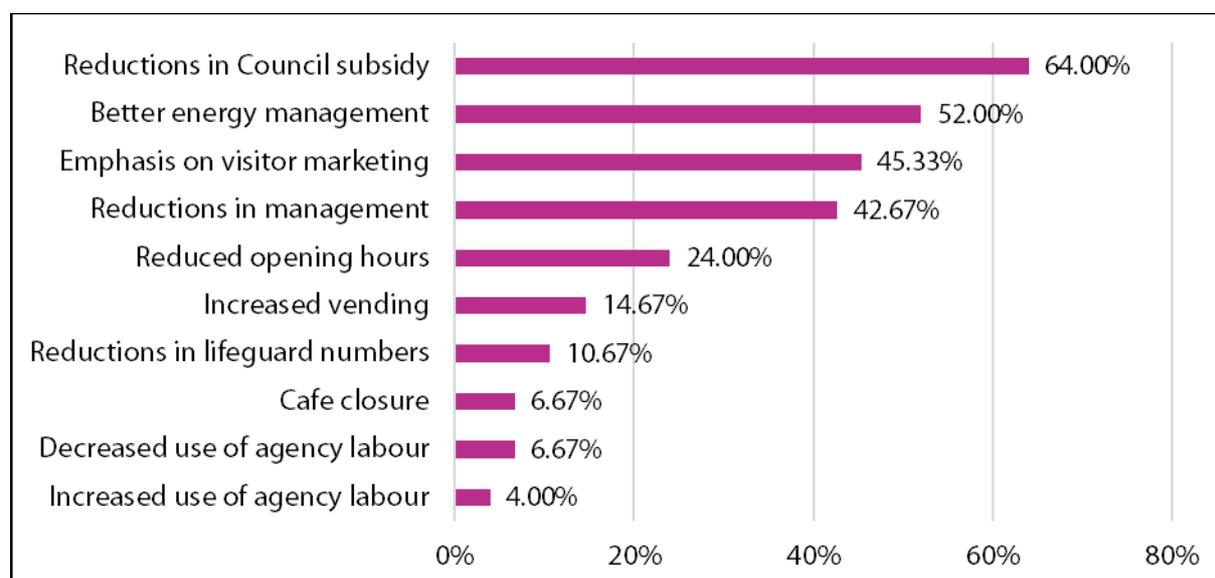
The average cost of a single adult swim is £4.32. The highest cost of a single swim was £5.80, and the lowest was £3.00.

### 11. Which software package do you use for managing leisure?



The majority of respondents (27 out of 71, 38.03%) said they used XN Leisure, closely followed by Gladstone MRM at 28.17% and Legend at 18.31%. Other packages not listed above but mentioned in the comments include Clarity, Sportsoft, EZ Runner, Fidelity, Specrix and Artifax.

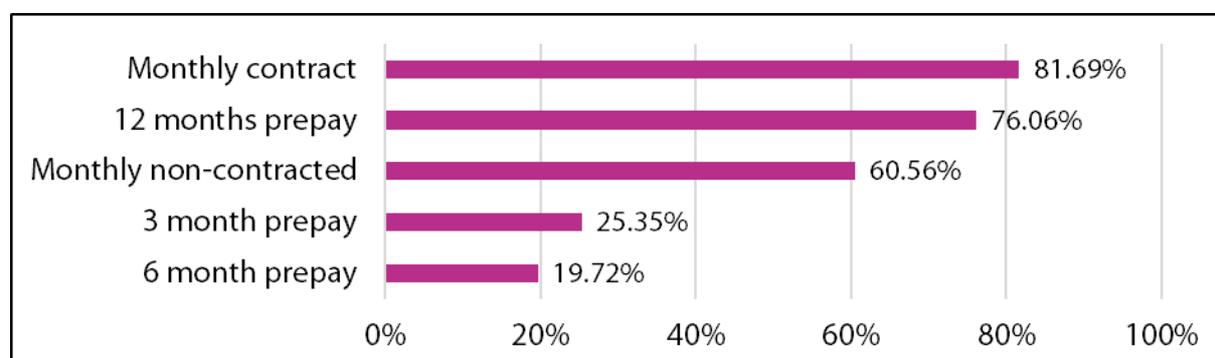
**12. With the continuing pressures on value for money and productivity, how do you expect the service to change over the next year? (Tick all that apply)**



Of the 75 responses to this question, 48 (64.00%) expected reductions in the subsidy given the council. There were also many respondents that expected the service to have better energy management (52.00%), emphasis on visitor marketing (45.33%) and reductions in management (42.67%).

Other expected changes for the service included a shift to a more commercial focus, increasing fees, reducing back office staff, reallocating opening hours, opening new facilities and closing older ones, reducing the focus on sports and community development, improving programming of activities and classes and potentially closing creches.

**13. What membership payment types do you offer? (Tick all that apply)**



Of the 71 respondents to this question, 58 (81.69%) offer a monthly contract, 54 (76.06%) offer 12 months prepay and 43 (60.56%) offer a monthly non-contracted payment option. 3 month and 6 month prepay options were less common.



#### 14. Typical monthly membership fee

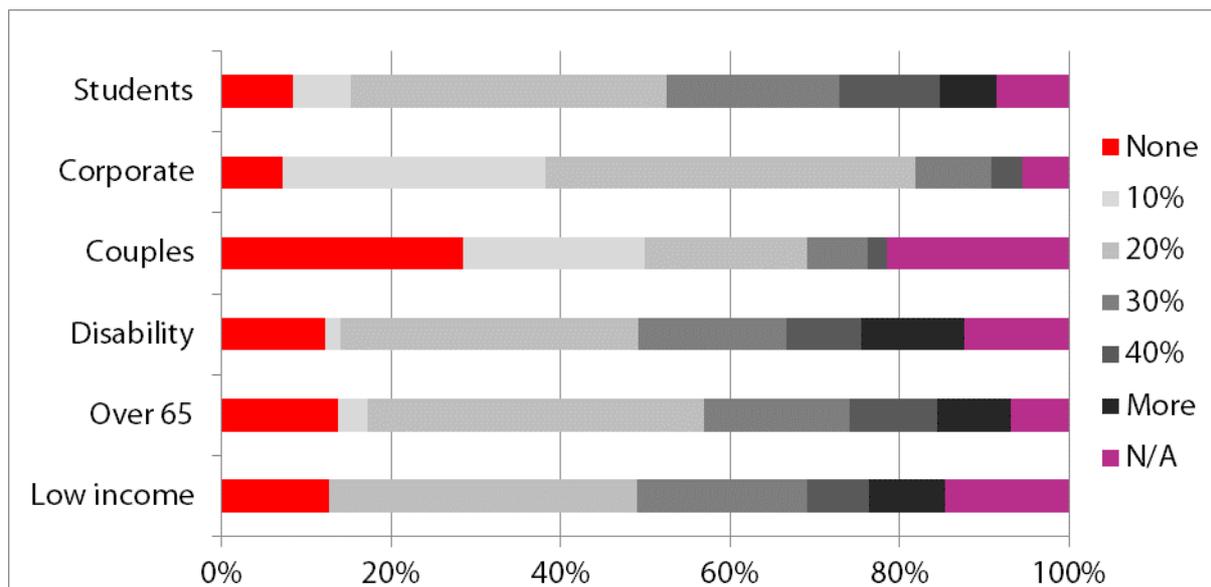
The average monthly full membership fee is £34.06, with the average off-peak membership fee being £25.11, swim only being £24.78, gym only being £25.62 and fitness classes membership being £26.90. The lowest and highest membership

|         | Full membership | Off Peak | Swim only | Gym only | Fitness classes |
|---------|-----------------|----------|-----------|----------|-----------------|
| Average | £34.06          | £25.11   | £24.78    | £25.62   | £26.90          |
| Lowest  | £22.50          | £18.00   | £16.00    | £17.99   | £21.00          |
| Highest | £49.00          | £35.00   | £36.35    | £47.00   | £36.00          |

#### 15. Do you have a joining fee?

40.85% of respondents do have a joining fee for their leisure facilities; the average cost is £21.19 and the most common answer was £20.00.

#### 16. Membership package discounts offered



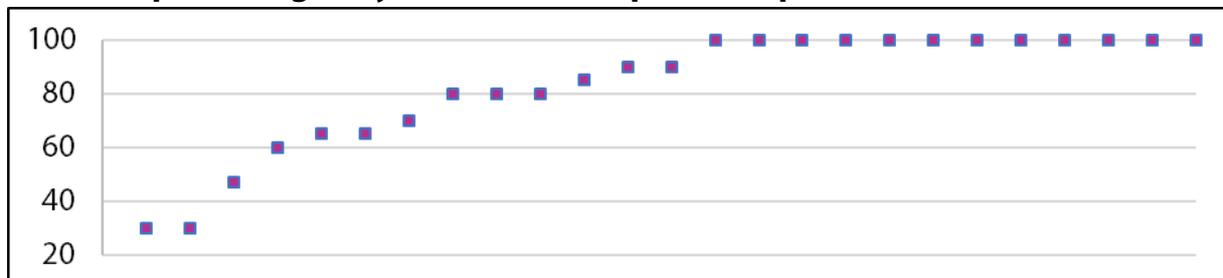
60 people responded to this question. The following number of respondents offered:

- **Any level of discount** - Students (49), Corporate (48), Over 65 (46), Disability (43), Low income (40), Couples (21).
- **No discount** – Couples (12), Over 65 (8), Low income (7), Disability (7), Students (5), Corporate (4)
- **More than 40% discount** – Disability (7), Over 65 (5), Low income (5), Students (4), Corporate (0), Couples (0)

#### 17. Who manages the direct debit administration and chases debtors?

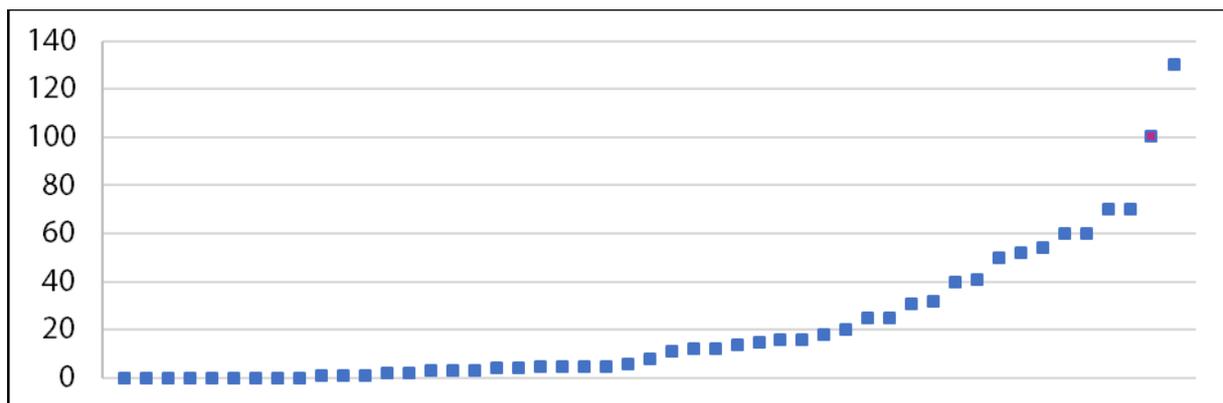
Both direct debit administration and debt chasing was likely to be handled internally (79.10% and 73.77% respectively). Chasing debt was the more likely of the two to be handled externally, with 22.95% of responses.

**18. What percentage of your membership base is 'peak'?**

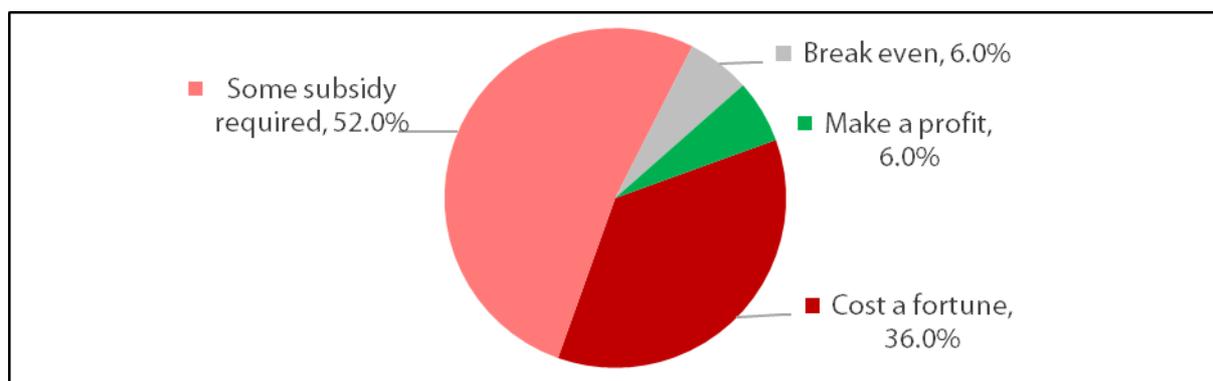


Of the 25 responses to this question, only 3 respondents had more off-peak membership than peak. 18 respondents said that their peak membership base was at least 80%.

**19. How many sports pitches (rugby, cricket, football etc) do you maintain?**

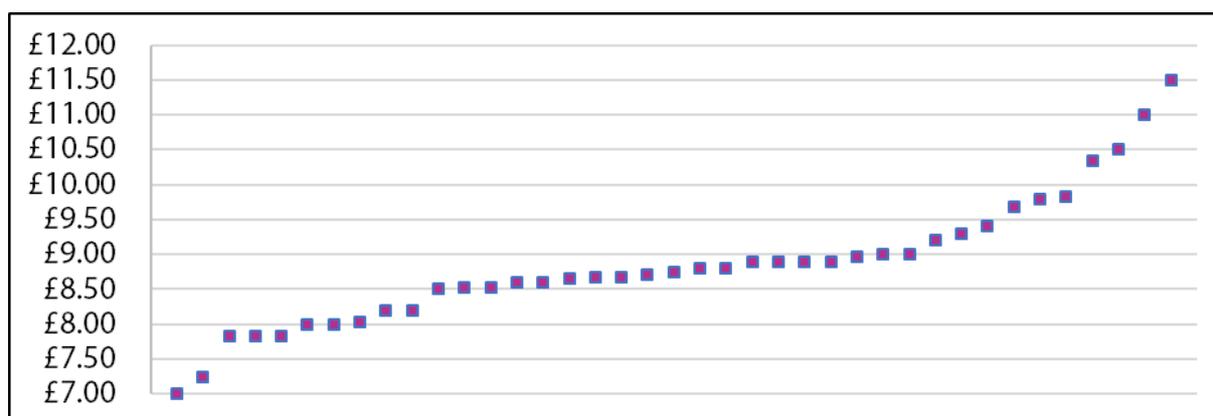


## 21. What is the financial cost of pitches to the Council?



Of the 50 respondents, only 3 respondents reported making a profit from pitches, and 3 others believed that they would break even. The clear majority felt that pitches would come at a cost to the council, with 26 reporting that some subsidy would be required, and a further 18 saying that pitches cost the council a fortune.

## 22. What is the basic current hourly rate for leisure staff (before tax) in £?



The average hourly rate for leisure staff was £9.00, the lowest pay was £7.00 and the highest was £11.50. The full range of responses is shown in the table above.

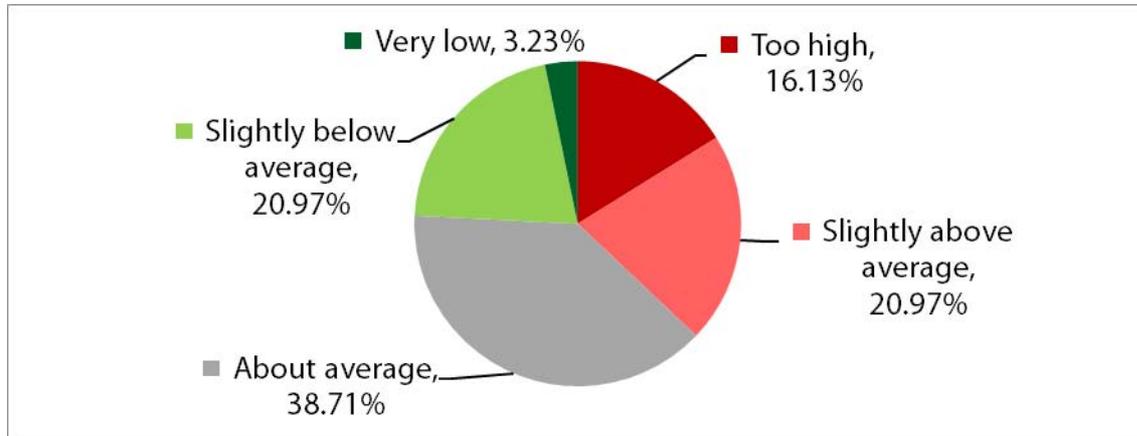
## 23. Parking at Leisure Centres – Do you charge for parking at any of your leisure centres?

The majority of respondents said that they did not charge for parking, only 15 out of 62 respondents said they did charge (24.19%).

## 24. If you charge for parking, what does it cost?

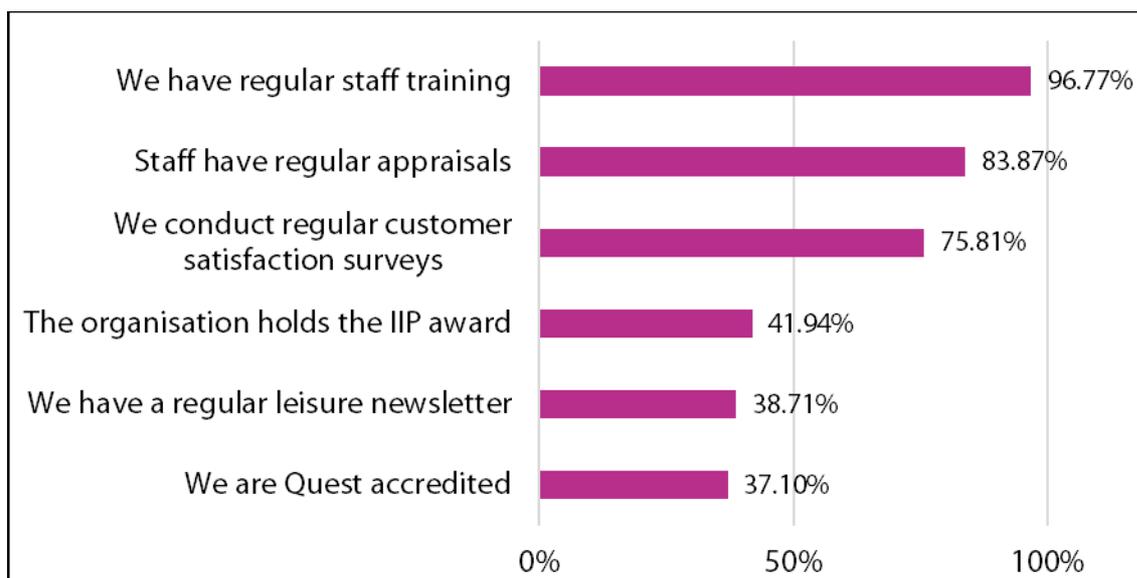
The average cost for a one-hour stay was £1.94, with a low of £0.80 and a high of £3.00. For a two-hour stay, the average was £2.53, with a low of £1.60 and a high of £4.80.

## 25. Are staff absence levels at an acceptable level?



23 of the 62 respondents felt that staff absence levels were above average, 24 felt they were average and 15 thought they were below average.

## 26. Staff training and quality (Please tick all that apply)



Of the 62 responses to this question, regular staff training (60 people), regular appraisals (52 people) and regular customer satisfaction surveys (47 people) were the most common answers.

## **27. Where do you see growth for leisure services over the next 12 months?**

A variety of suggestions were given for this question. Some of the more common themes included:

- Swimming lessons
- Off peak fees
- Health referrals
- Personal training
- Fitness classes / Group exercise
- Older people's activities
- Family activities
- Mindfulness / health suites
- Gym memberships
- Children's parties
- Extreme sports
- Gymnastics
- Events
- Holiday courses
- Soft play

## **28. Where do you see future decreases in work for the service?**

This question also prompted a variety of responses. Common areas of future decreases included:

- Traditional sports in halls (e.g. racket sports)
- Catering and vending
- Opening hours
- Gym attendance levels
- Coached activities
- Number of facilities

## **Local Authority Highways Services**

### **State of the Market 2018**

#### **The Association for Public Service Excellence**

APSE member authorities have access to a range of membership resources to assist in delivering council services. This includes our regular advisory groups, specifically designed to bring together elected members, directors, managers and heads of service, together with trade union representatives to discuss service specific issues, innovation and new ways of delivering continuous improvement. The advisory groups are an excellent forum for sharing ideas and discussing topical service issues with colleagues from other councils throughout the UK.

Advisory groups are a free service included as part of your authority's membership of APSE and all end with an informal lunch to facilitate networking with peers in other councils. If you do not currently receive details about APSE advisory group meetings, and would like to be added to our list of contacts for your service area, please email: [enquiries@apse.org.uk](mailto:enquiries@apse.org.uk).

Our national advisory groups include: -

- FM & Building Cleaning
- Catering (school meals)
- Cemeteries and Crematoria
- Environmental Health
- Highways and Street Lighting
- Housing Construction and Building Maintenance
- Local Authorities Commercialisation, Income and Trading Network
- Parks, Horticulture and Grounds Maintenance
- Renewables and Climate Change
- Sports and Leisure Management
- Vehicle Maintenance and Transport
- Waste Management, Refuse Collection and Street Cleansing