

State of the Market Survey 2017

Sports and Leisure



Briefing 17-43
November 2017



The state of the market survey was conducted by Rob Bailey, APSE Principal Advisor with assistance from Ian Scherr - Research and Coordination Officer

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Sports and Leisure

State of the Market 2017

APSE conducted an online survey during May and June 2017. A series of questions were asked covering a range of issues of interest to those officers and councillors responsible for Sports and Leisure services.

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

Methodology

At the beginning of May, an email invitation was sent out to all APSE colleagues who deal with Sports and Leisure. This contained 33 questions on various different issues faced by those involved, 31 of which will be used for this report. Duplicate responses and almost wholly incomplete responses were eliminated from the sample, leaving a final sample of 76.

No questions were mandatory, so the total amount of responses differs from question to question. This report will state the total that answered each question in the results. Respondent's information has been kept confidential, with identifying information being limited to the general area of the U.K. the respondent is from.

The relatively small sample size makes it challenging to distinguish sample variance from actual trends across time. Whilst reference to previous years is made, this is purely for general information, and this report is best treated as a snapshot of the current opinions of those working in highway services, rather than a thorough analysis of change over time.

Results from the Survey

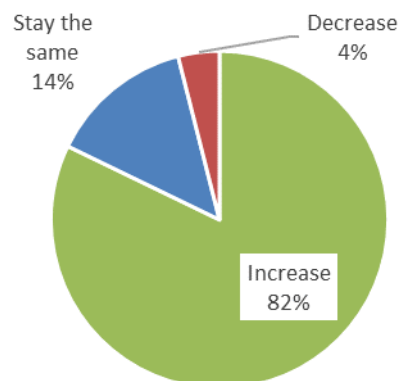
1. Where in the United Kingdom do you work?



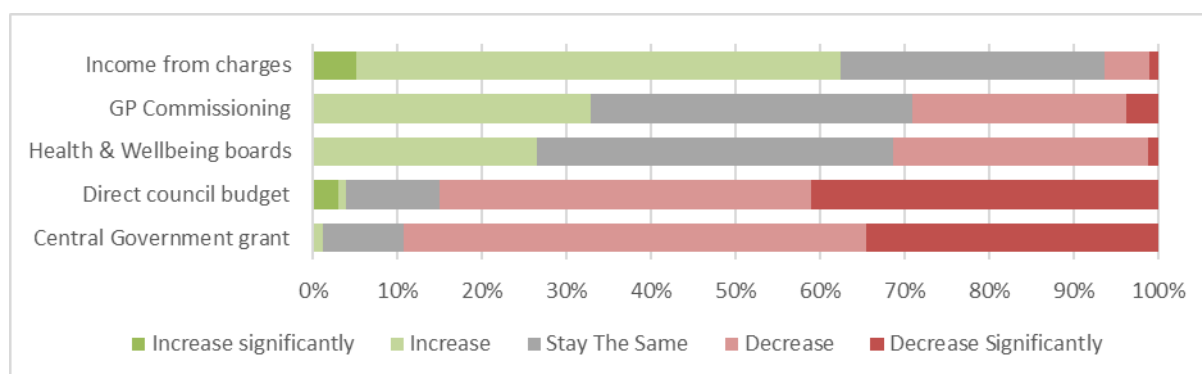
Respondents represent variety from across the whole of the United Kingdom. England accounts for 83 of respondents, with 10 from Scotland, 10 from Northern Ireland and 8 from Wales. This gives us a total sample of 103.

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

Of the 101 people that answered this question, 83 believe that their workload will increase during the next year. Only 4 believed that their workload would reduce over the same period.



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



The majority of people (60 total) felt that they would have an increase in income from charges, with 5 of them believing that the increase will be significantly. Only 6 in total felt that income from this would either decrease or decrease significantly. GP commissioning is the next largest area where funding is expected to grow, with 26 believing that funding will increase here, compared with 23 who felt it would decrease or decrease significantly.

These are also the only two areas where more people thought that there would be increases rather than decreases.

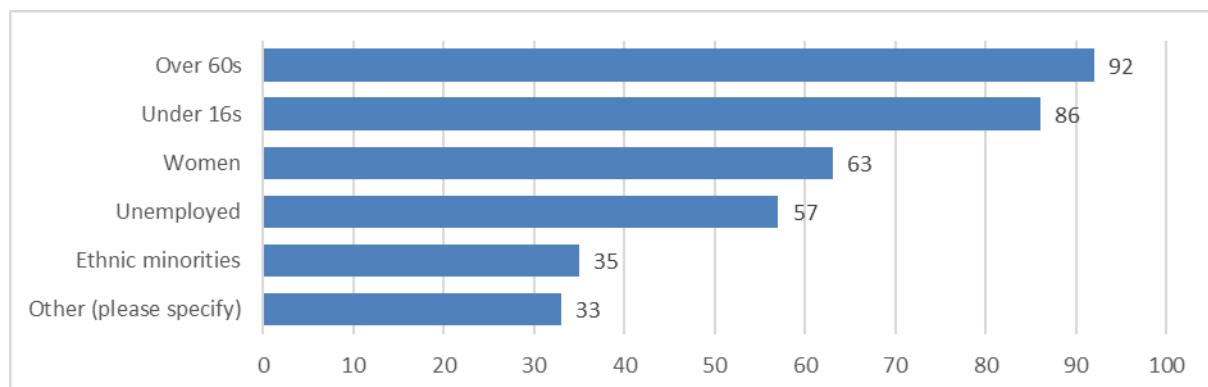
Health and Wellbeing boards was the most divisive category, with almost as many people believing there would be an increase in funding from this stream (22) as a decrease (26).

There was a clear majority who believed that there would be a reduction in money received from Direct Council Budgets (85 in total) and Central Government Grants (75 in total). Only one person believed there would be an increase in budget funding from Central Government Grants.

Comments suggest a number of other streams of funding, such as commissioning opportunities and income from schools. A few also mentioned that there would be opportunities for cross subsidies and joint ventures with private organisations.

A total of 101 responded to this question, though many did not give an answer to all 5 sections.

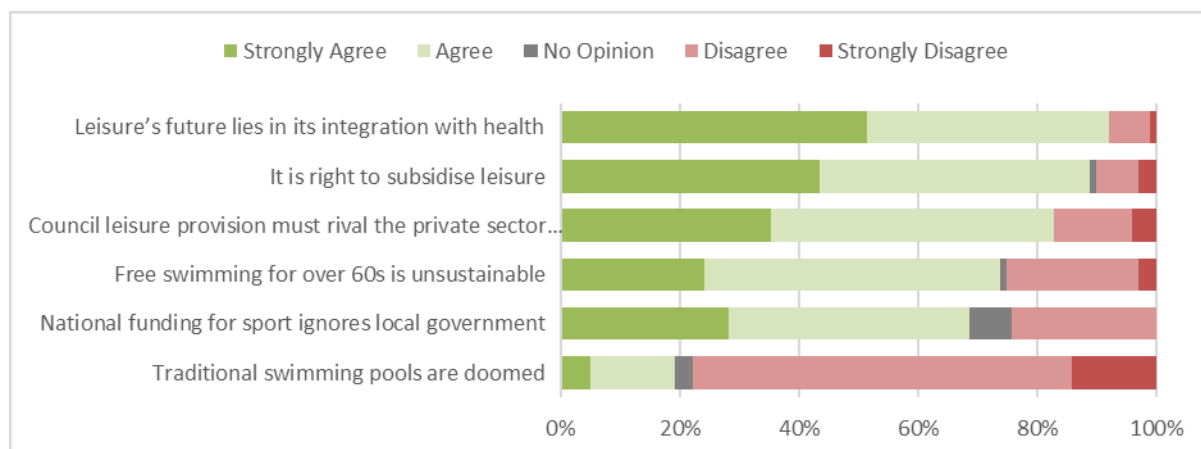
4. Do you actively encourage participation from particular groups within the community? e.g. promotions, reduced charges, specific closed sessions etc. (please tick all that apply)



Our survey shows that Over 60s and Under 16s are the two most targeted groups for encouraging participation, with 92 and 86 people saying their authority aims for these groups respectively.

The largest group identified in the 'Other' category were people with disability or health issues, with a few also suggesting ex-service personnel and those with financial difficulties.

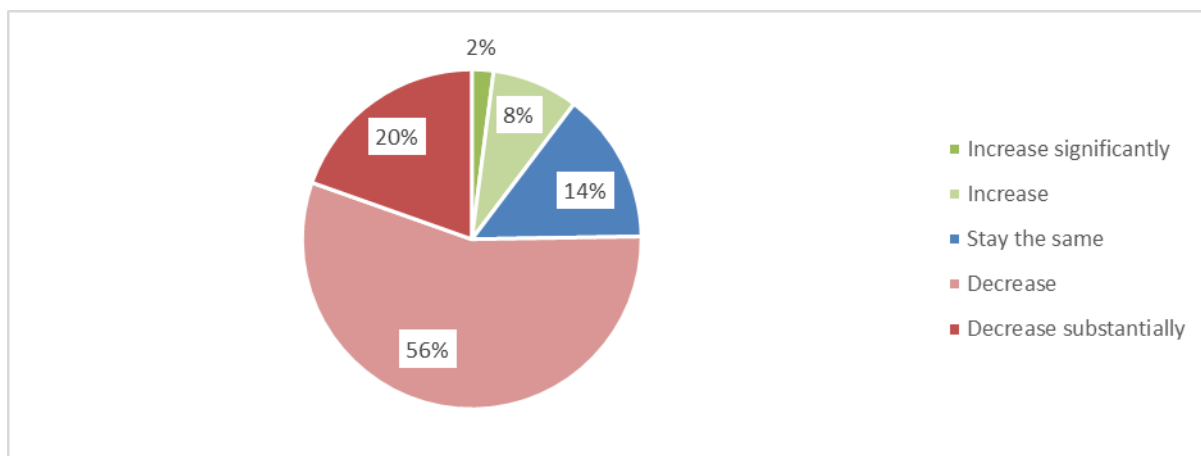
5. Please give your opinion on the following statements



There was clear agreement for all statements except for 'Traditional swimming pools are doomed'. There has been a slight increase in the people who believed 'free swimming for over 60s is unsustainable', with 74% in total agreeing compared to 71% in 2016. There is also an almost 10% increase in the people who agreed that 'national funding for sport ignores local government, compared to the previous year.' There was also a slight increase in the amount of people who disagreed with 'Traditional swimming pools are doomed'.

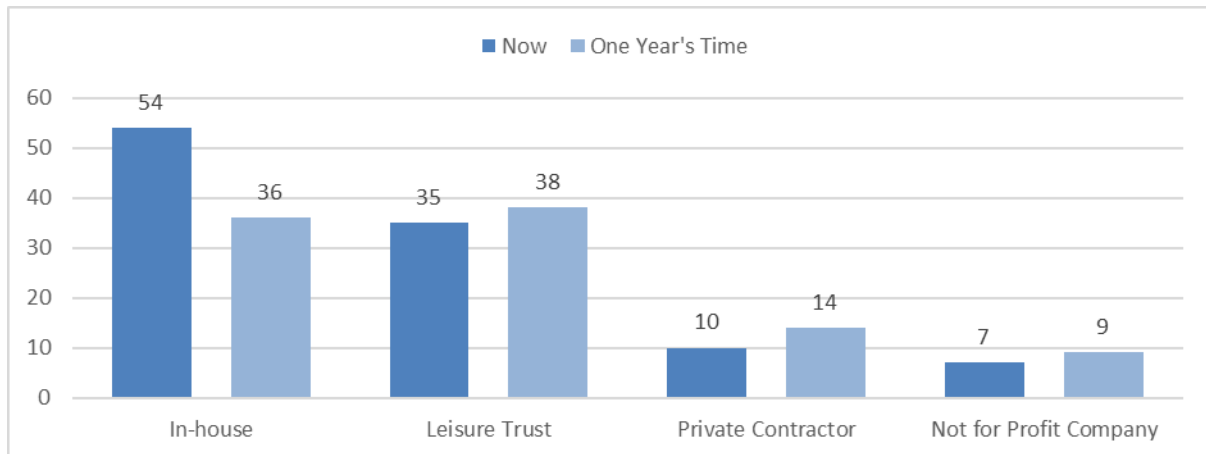
A total of 99 people answered this question.

6. Overall - How do you expect the leisure budget to change next year?



A little over three quarters of respondents (72) believe that their budget will decrease over the next year, with 19 of them expecting that decrease to be substantial. Only 10 people believe that their budget will increase. This is actually higher than in 2016, where only 5% of people believed there would be a budget increase.

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

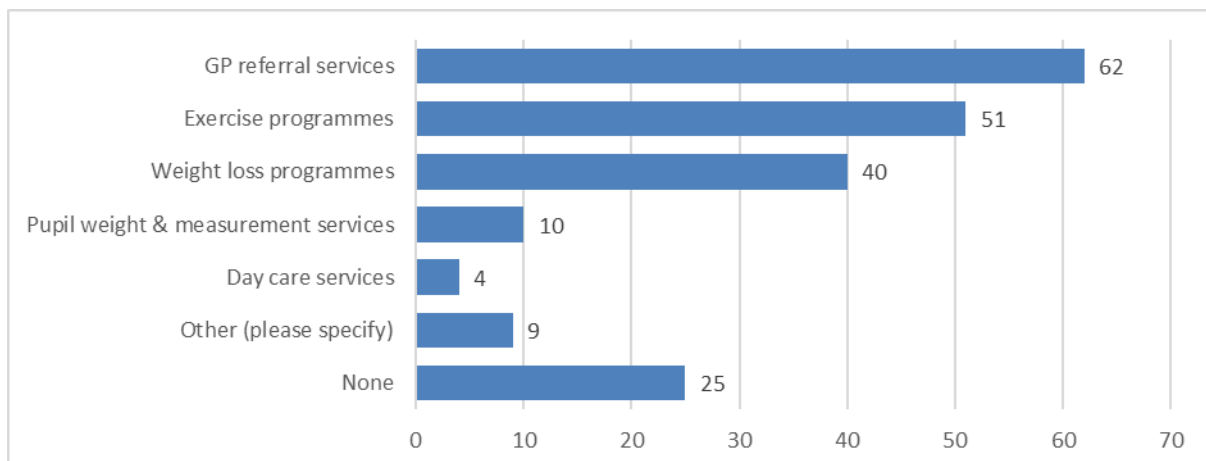


The most popular option for leisure management is for it to be handled in-house; however, there is a clear expectation in some councils that this will change in the near-future. Not for Profit companies were the least popular.

Of those that did manage their leisure in-house, a leisure department was the most popular. A small amount of people said that they use arms-length companies or has the council acting as a client.

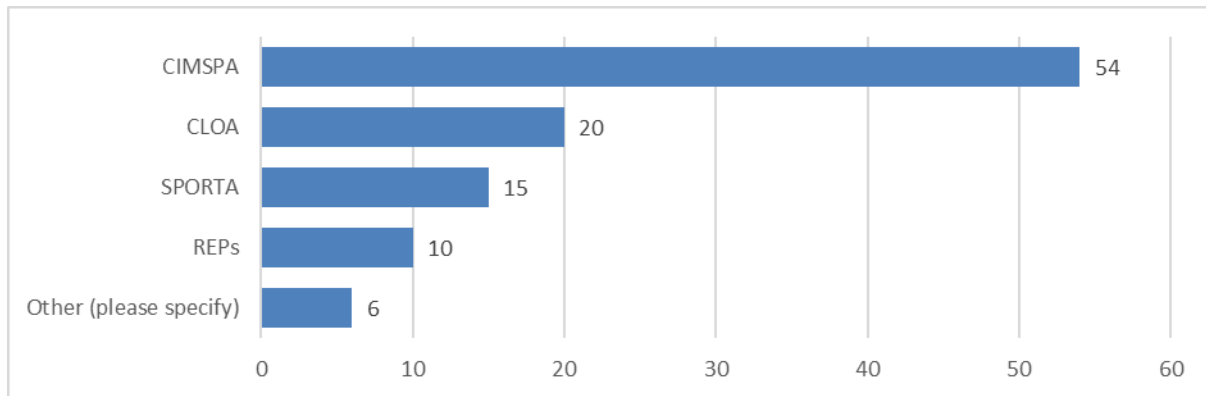
There were 97 people who responded to this question, and some of these represent authorities that have a mixed delivery model.

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



GP referrals were the most commissioned service from health boards, followed by exercise programmes and weight loss programmes. Other services that were mentioned in the comments were cycling programmes, falls prevention, and active youth programmes.

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



Amongst APSE membership, the Chartered Institute for the Management of Sport and Physical Activity (CIMPSA) is the most common body that respondents were a member of, followed by the Chief Cultural & Leisure Officers Association (CLOA), Sporta and the Register of Exercise Professionals (REPs). Other bodies included UK Active and LFX.

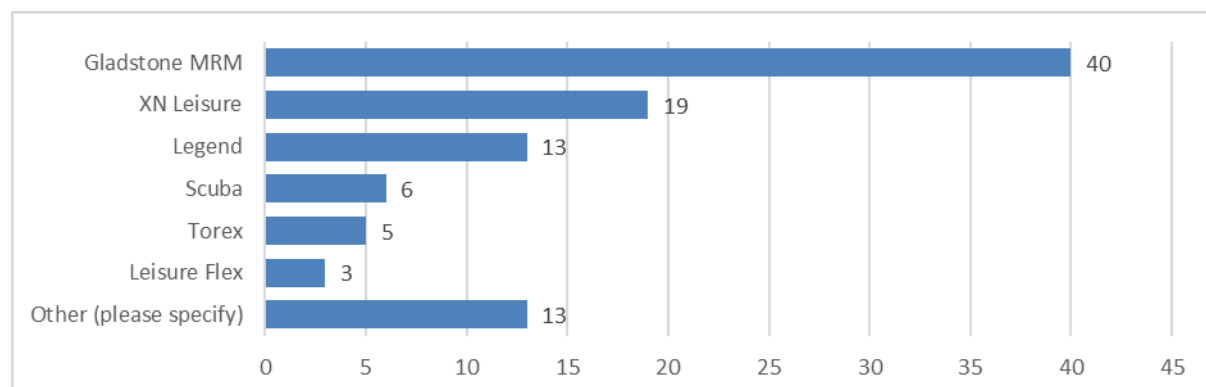
10. What is the charge (if applicable) for a single adult swim?

The average (mean) cost of a single adult swim is £4.07. 50% of all respondents said their cost was between £3.60 and £4.50. The highest cost of a single swim was £6.65, and the lowest was £2.95.

There were 79 responses to this question. Where multiple prices were given, the highest was used. The average corresponds closely with the APSE Performance Networks average of £3.78 for 2016/17 collected formally across the UK

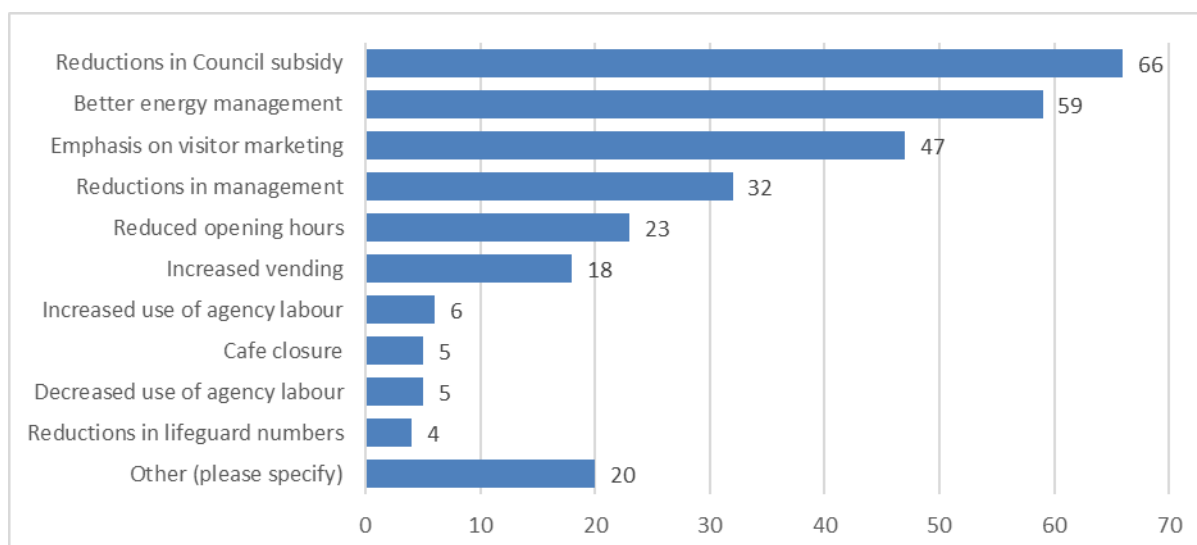


11. Which software package do you use for managing leisure



40 out of 88 people said they used Gladstone MRM when managing leisure, making it the most popular choice. In the comments, Clarity was the only package mentioned multiple times, and other solutions such as outsourcing it or using calendars were offered.

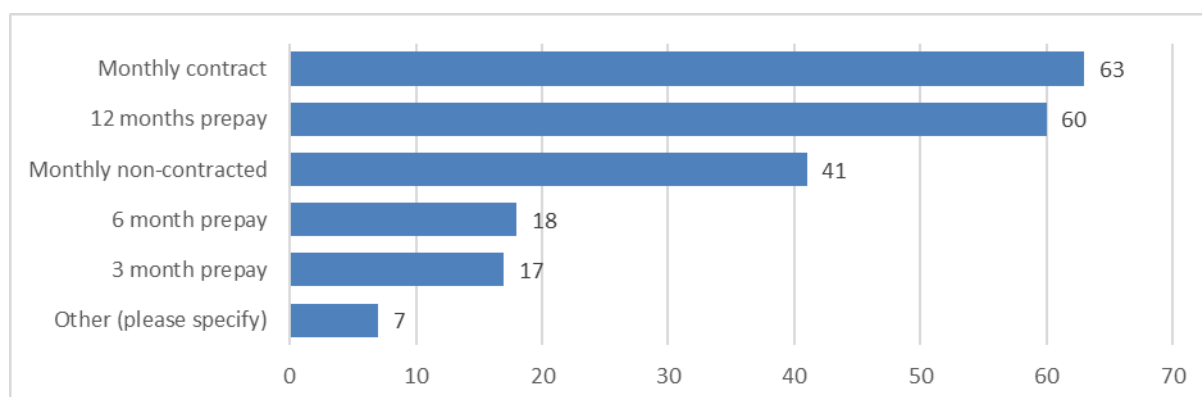
12. With the continuing pressures on value for money and productivity how do you expect the service to change over the next year? (Tick all that apply)



Of the 91 people who responded to this question, 66 expected there to be reductions in the subsidy given by the council. There is also an expectation that there will be better energy management and an increased emphasis on marketing to visitors. Some also expected effects to include shorter opening times and an increase in vending, and a small amount believes that cafes would close and there would be fewer lifeguards. Almost the same amount of people thought that there would be more use of agency labour (6) as those who thought there would be less (5).

Other changes that were commented included closing sites to focus on a smaller number of large sites, and an increased focus on increasing revenue generating opportunities.

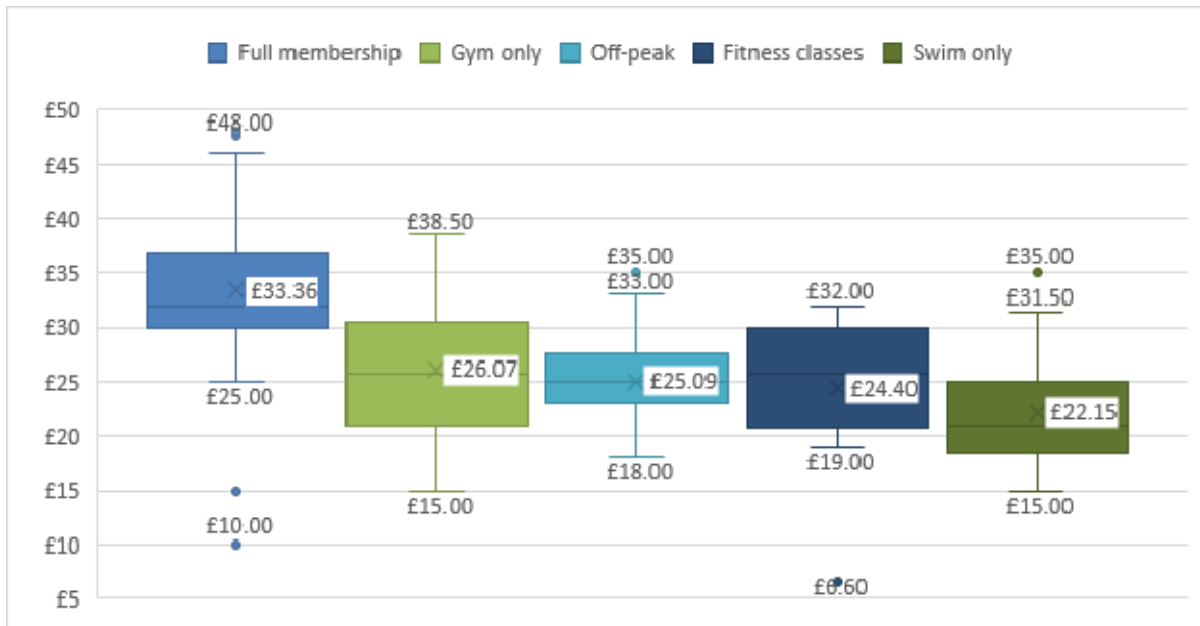
13. What membership payment types do you offer? (tick all that apply)



Of the 81 people who answered this, 63 said they offered a Monthly contract, and 41 a monthly option that wasn't a contract. In total, 76 people said they offered at least one of these options.

A one-year prepay was the second most popular option, and around a fifth of people said they offer a 6-month and/or a 3-month pre-pay option.

14. Typical monthly membership fee

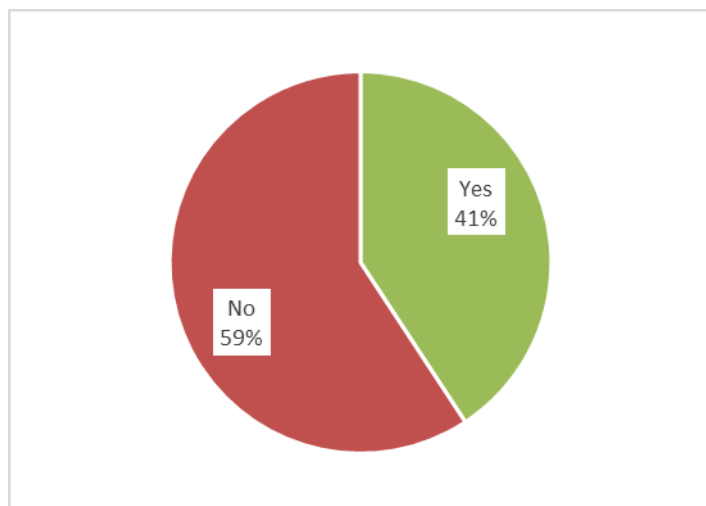


The graph above shows the mean values for monthly membership in each category, as well as demonstrating the range of costs across respondents. The average cost for a full membership is £33.36, with half of respondents identifying a monthly cost between £29.99 and £36.99. For Gym only memberships, the average is £26.07, with the middle-range being between £20.98 and £30.50. The off-peak average is £25.09, with half of charges falling between £22.99 and £27.50. Fitness classes averaged £24.40, with the middle ranging from £20.71 to £29.96, and the swim only average was £22.15 with a range in the middle from £18.50 to £25.

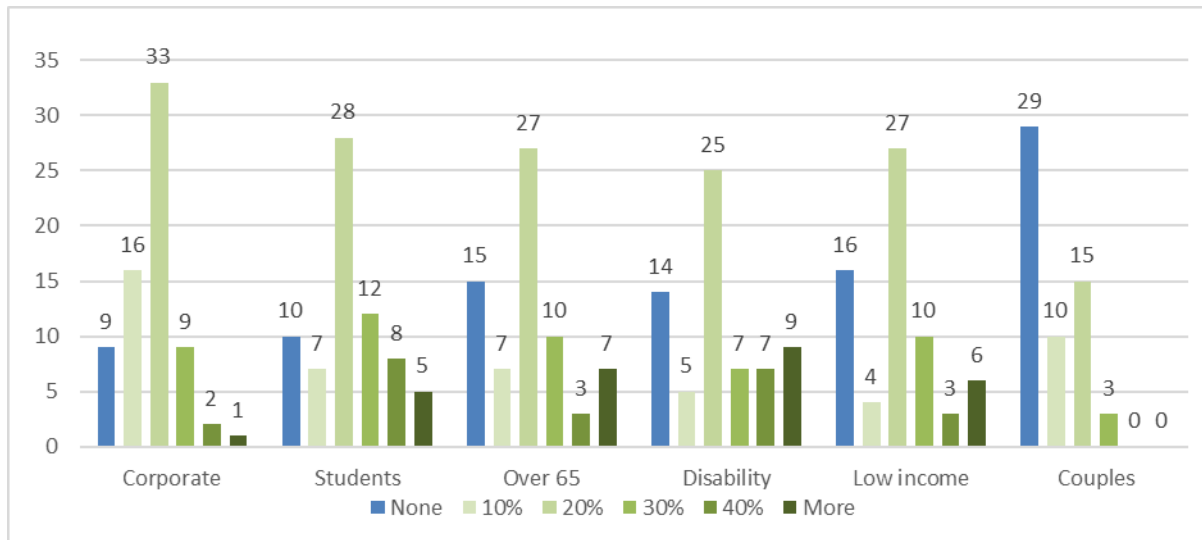
Dots on the graph represent outliers. 68 people gave a figure for at least one of these categories.

15. Do you have a joining fee?

The majority of respondents said they did not have a joining fee. For those that did, the price ranged from £10 to £50, with most being around the £20-25 mark.

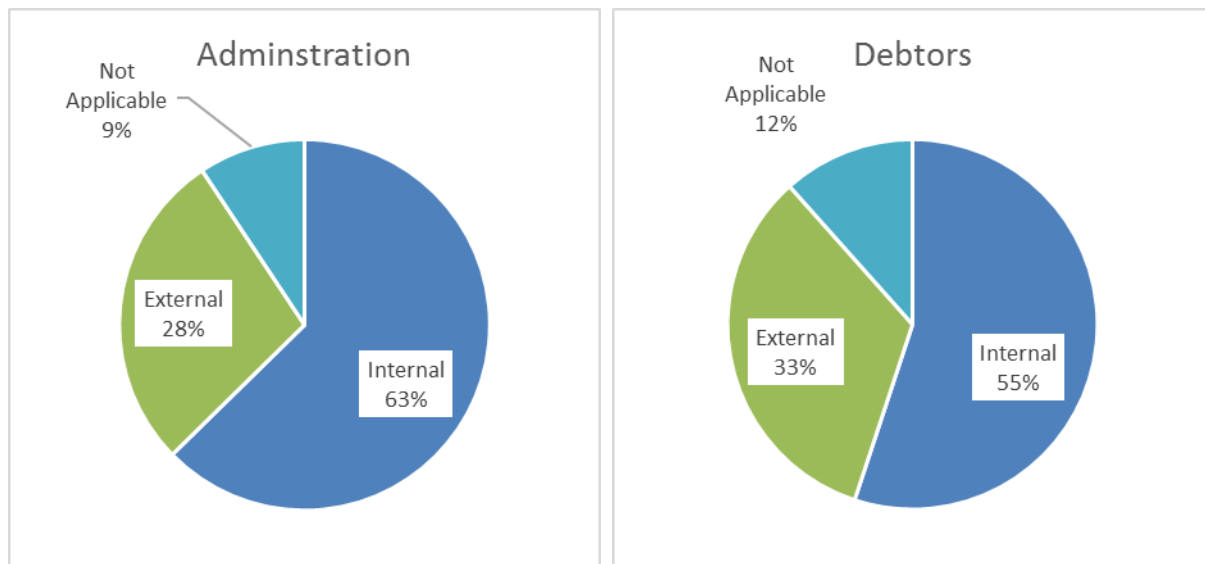


16. Membership package discounts offered



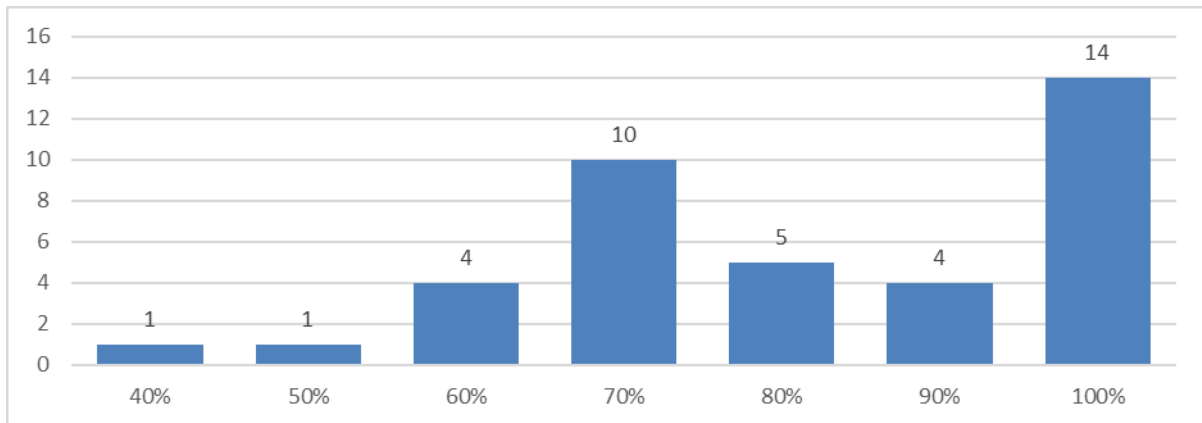
A total of 76 people answered for at least one of these categories. Corporate discounts are offered by 61 of our respondents, with most offering them a 20% discount. Students were the next biggest group with 60 responses that offer some form of discount, over-65s had 54, disability had 53 and low income had 50. Couples were least likely to receive a discount, with only 28 offering any form of discount, and most of these being below a 30% discount.

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



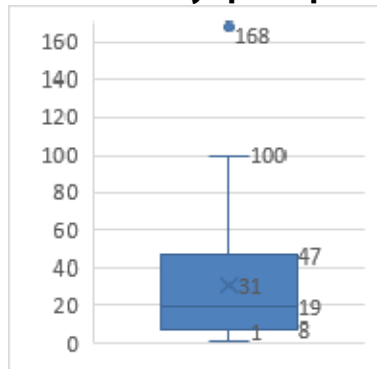
Both direct debit administration and debt chasing was likely to be handled internally, (47 and 38 responses respectively) though chasing debtors was slightly more likely to be handled externally. There were a total of 76 responses to this question.

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



Of the 39 people that responded to this question, only one said their membership was more off-peak than peak, and only one said there was an even split. Over half of people said that their membership was at least 80% 'peak'.

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

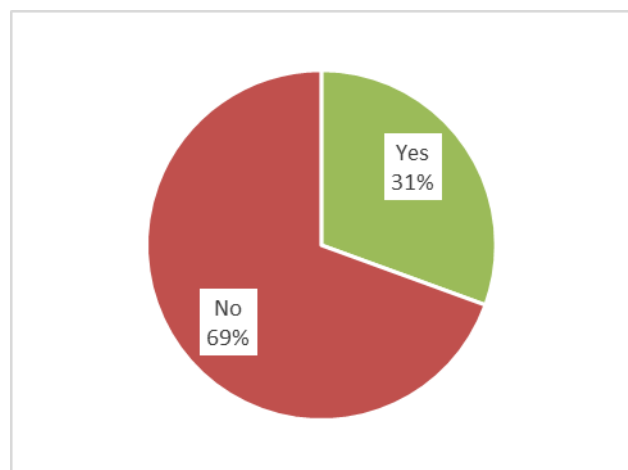


There was a wide range of answers given to this, with the lowest being 1 to the highest at 168 sports pitches. The average (mean) number of pitches maintained is 31. Half of people gave a number between 8 and 47.

There were 63 responses to this question.

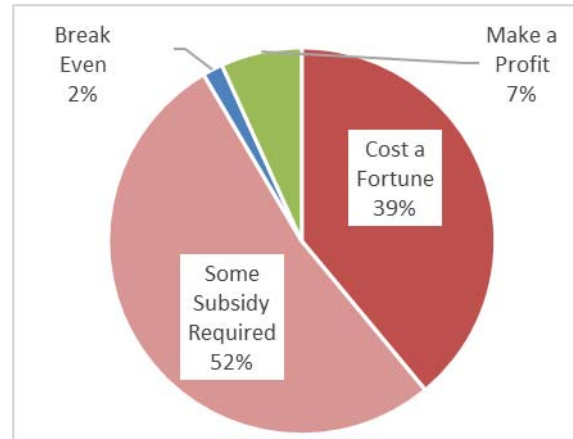
20. Have you established any new pitches over the last 2 years?

Out of the 72 respondents, 22 said they established at least one new pitch in the past two years. The majority had not.



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

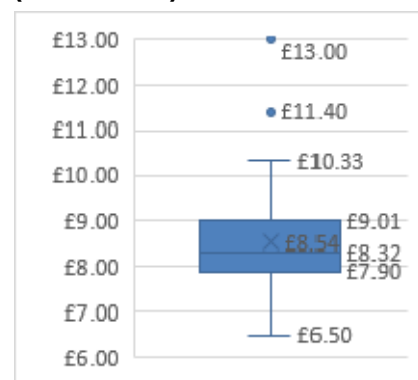
Only 4 people out of 72 believed that their sports pitches would make a profit, and one that believed that it would break even. The clear majority believed that pitches come at a cost to the council, with 23 saying that it would "cost a fortune"



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

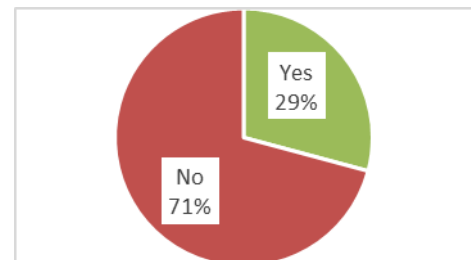
The average hourly rate for leisure staff was £8.54, with 50% of staff being paid between £7.90 and £9.01. The lowest pay was £6.50, and the highest £13.

The comments noted that there was often a difference between swimming pool staff and other staff, with lifeguards and other poolside staff being paid slightly more. There were 72 responses to this question.

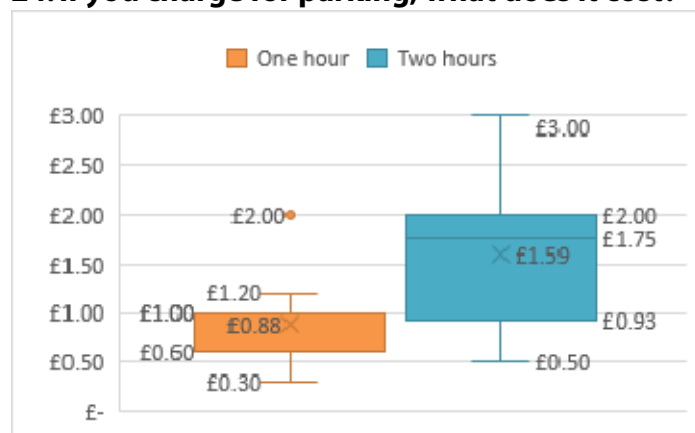


23. Parking at Leisure Centres Do you charge for parking at any of your leisure centres?

The majority of respondents said that they did not charge for parking, with only 21 out of 72 people saying that they did.



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

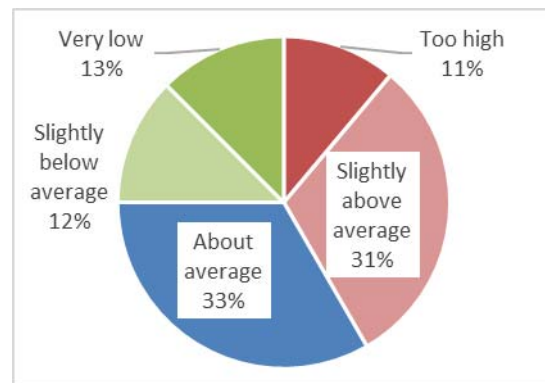


The average cost of parking for a one-hour stay was 88 pence, with half of costs falling between 60 pence and £1.20. For a two hour stay, £1.59 was the average, with the midrange being between 93p and £2.

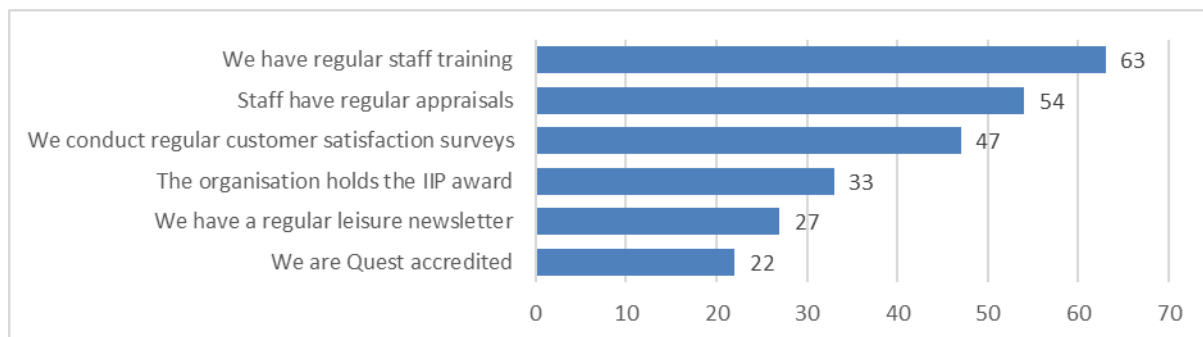
25. Are staff absence levels at an acceptable level?

Out of 72 responses, 30 felt that absence was above average, with 8 of these respondents claiming it was too high.

9 people each felt that staff absence was slightly below average and very low, leaving 24 suggesting their staff absence was about average.



26. Staff Training and Quality. Please tick all that apply.



There were 72 responses to this question.

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

A variety of suggestions were given for this question, with health services being an area that many saw as likely to grow over the coming year. This could be in the form of closer work with GPs or developing 'Wellness programmes'. There were many that mentioned expanding their programmes with youth and children initiatives. A small number also mentioned expanding their community capacity and co-locating with other services such as libraries.

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

Areas of decrease identified by respondents included sports development and sports halls, caused by funding cuts. Others also suggested that financial pressures on users may see a reduction in longer term membership in favour of Pay-as-you-go and shorter term options. Areas that do not have a health focus were also identified as likely to be cut.

Local Authority Highways Services

State of the Market 2017

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.

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