apse membership resources

State of the Market Survey 2019

Local Authority Sports and Leisure Services

Briefing 19/43
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State of the Market Survey 2019

Local Authority Sports and Leisure services

The state of the market survey was conducted by Rob Bailey, APSE Principal Advisor for Sports and Leisure.

The report was written and prepared by Garry Lee, Research and Coordination Officer.

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About APSE

The Association for Public Service Excellence (APSE) is a not-for-profit local government body working with over 300 councils throughout the UK. Promoting excellence in public services, APSE is the foremost specialist in local authority frontline services and operates one of the UK's largest research programmes in local government policy and frontline service delivery matters.

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Table of Contents

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

Results at a glance	
Workload	
Percentage expecting the workload of the leisure section to increase over the next 12 months	**79.27%**
Staffing	
Average basic current hourly rate for leisure staff (before tax)	**£9.49**
% of respondents who say staff absence levels are 'slightly above average' or 'too high'	**33.34%**
% of respondents with difficulty recruiting lifeguards	**56.36%**
% of respondents with difficulty recruiting instructors	**72.22%**
% of respondents with difficult recruiting technical / managerial staff	**20.00%**
Finance and charges	
% expecting the leisure budget to either decrease or decrease substantially	**57.68%**
Average charge for a single adult swim	**£4.43**
Average typical monthly full membership fee	**£34.19**
% of respondents with a joining fee for facilities	**44.12%**
% of respondents who charge for parking at any of their leisure facilities	**27.59%**
Service delivery	
% of respondents who have established any new pitches over the last 2 years	**40.68%**
% of respondents who answered 'some subsidy required' in the financial cost of pitches to the Council	**55.93%**
Expected changes over the next year	
% of respondents expecting reductions in Council subsidy	**65.79%**
% of respondents expecting reductions in management	**42.11%**

% of respondents expecting reduced opening hours	**25.00%**

Sports and Leisure

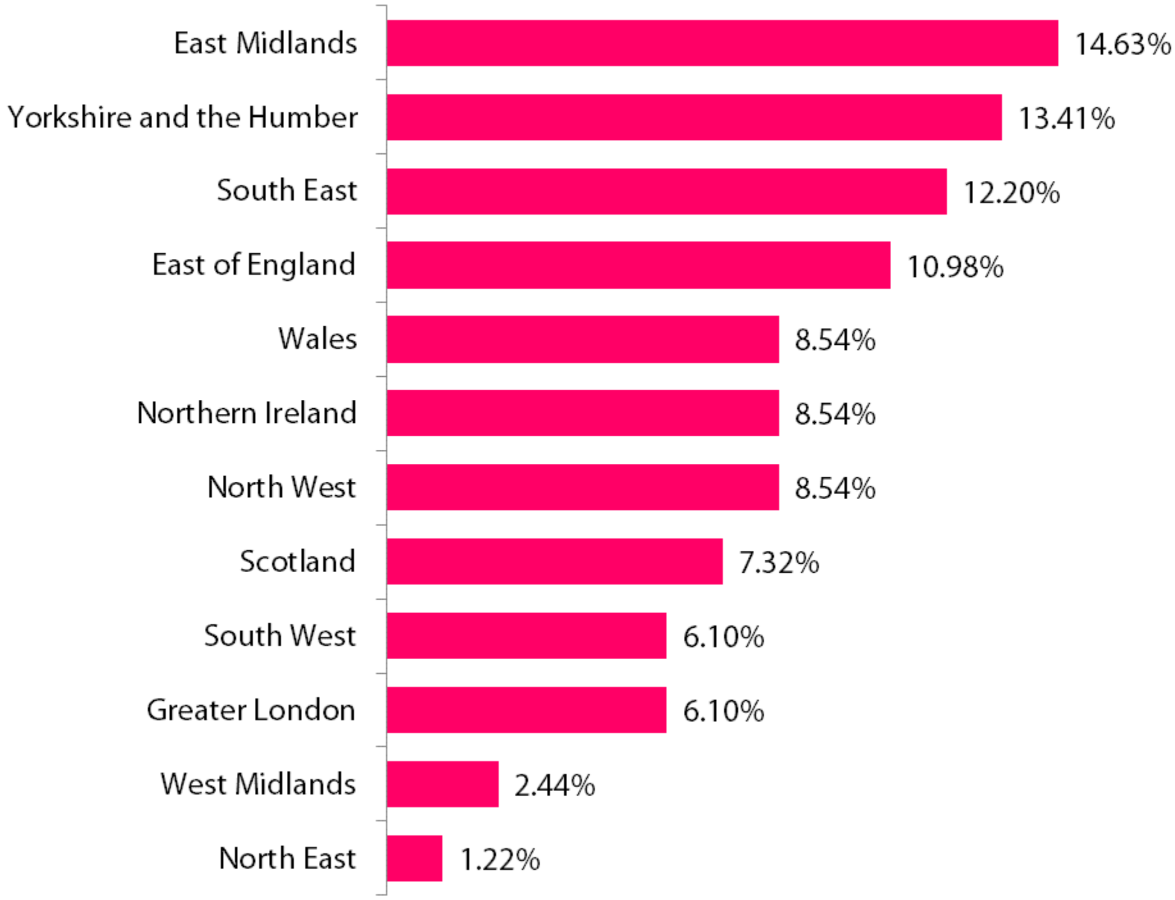
State of the Market 2019

APSE conducted an online survey between June and July 2019. A series of questions were asked covering a range of issues of interest to those officers, managers 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.

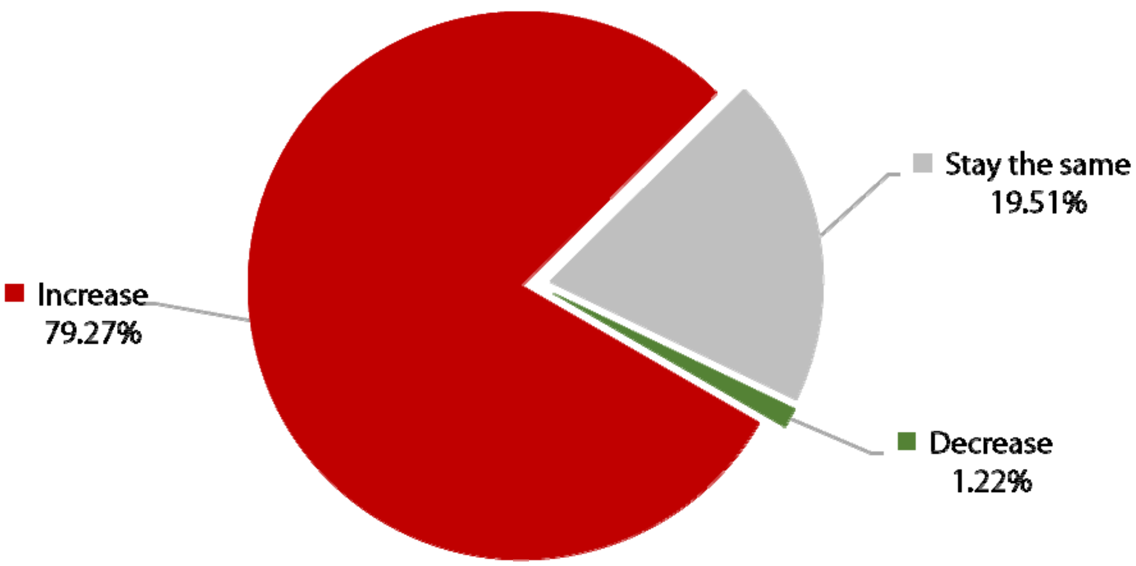
There were 82 responses from local authorities to this survey. None of the questions were mandatory, so the total amount of responses differs from question to question. Individual details of respondents have been kept confidential. Results of the survey should be treated as a snapshot of current opinions of those working in sports and leisure services rather than a thorough analysis of change over time.

Survey respondents by location:



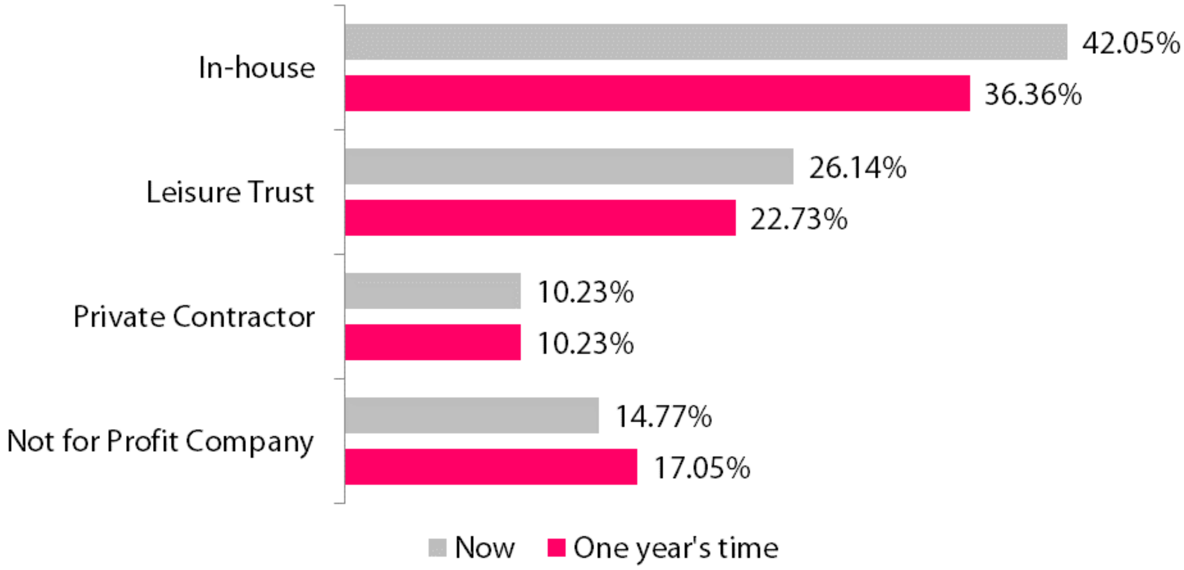
Section 1 – The Service

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



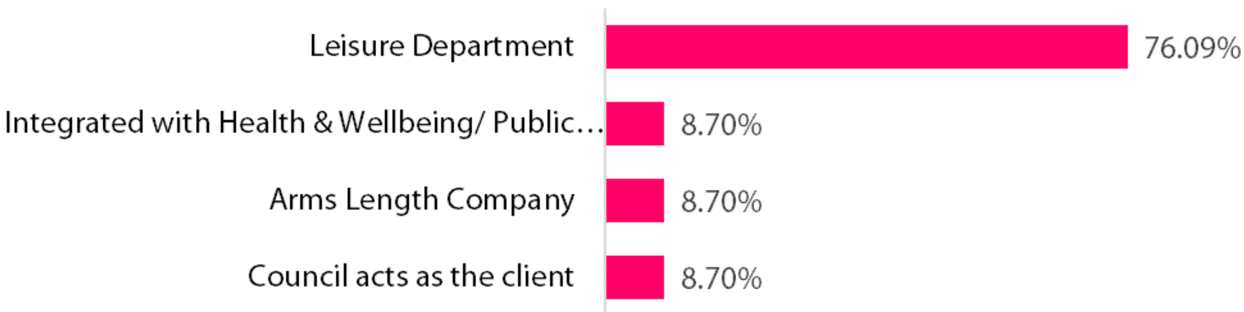
Respondents to the survey largely expect that the workload of the leisure section will increase over the next 12 months (79.27%) or stay the same (19.51%).

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



While the majority of respondents expected their service to be managed the same way in 12 months' time, 5.69% less expected to be managed in-house, 3.14% less expected to be managed by a leisure trust and 2.28% more expected to be managed by a not for profit company.

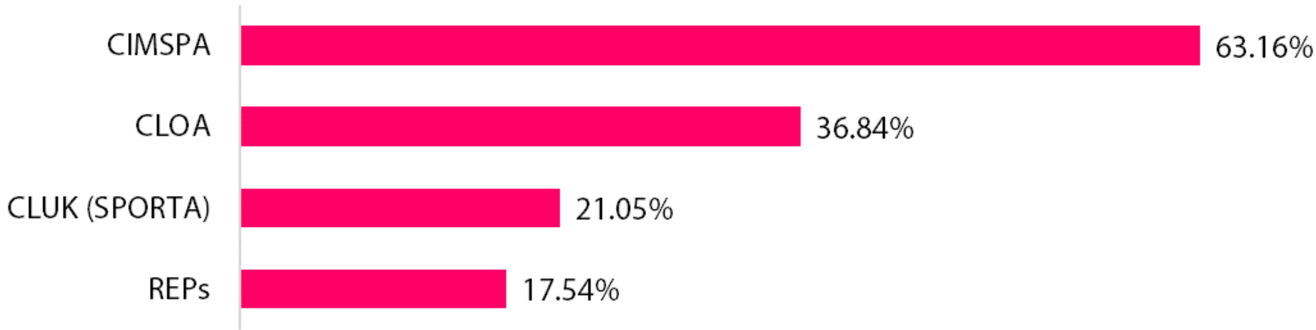
If in-house, which of the following apply?



76.09% of in-house respondents are leisure departments, 8.7% are integrated with Health & Wellbeing / Public Health, 8.7% are an Arm's Length Company and 8.7% have an arrangement where the Council acts as the client.

One respondent said that their service was part of their Participation and Achievement service, which sits alongside adult learning, libraries, youth service arts and heritage.

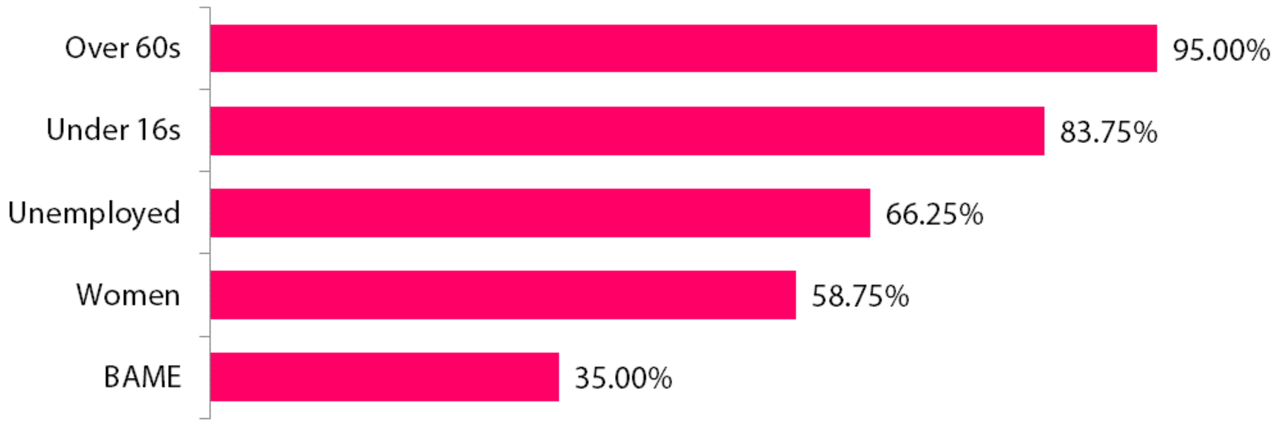
Are you a member of any industry governing bodies? (Tick all that apply)



63.16% of respondents to the survey are a member of the Chartered Institute for the Management of Sport and Physical Activity (CIMSPA), 36.84% are members of the Chief Cultural & Leisure Officers Association (CLOA), 21.05% are members of Community Leisure UK (CLUK (SPORTA)) and 17.54% are members of the Register of Exercise Professionals (REPs).

Respondents also identified being members of Swim England, UKActive, the Scottish Leisure Networking Group, VOCAL Scotland and Sporta Scotland.

Do you actively encourage participation from particular groups within the community? e.g. promotions, reduced charges, specific closed sessions?

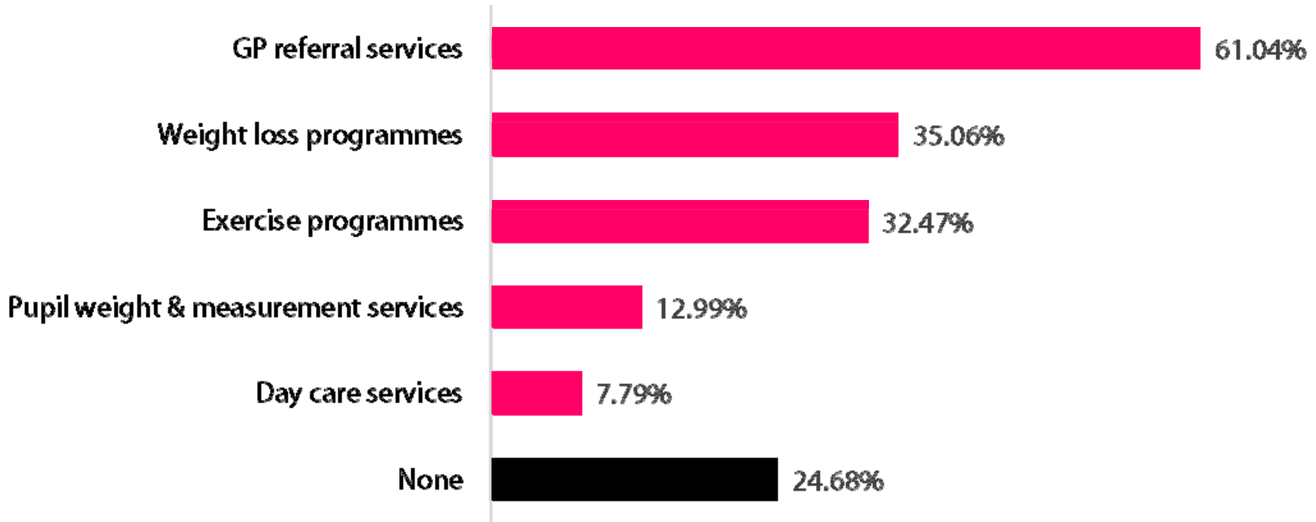


95.00% of respondents actively encourage participation from over 60s; participation is also encouraged from the under 16s (83.75%), the unemployed (66.25%), women (58.75%) and ethnic minorities (35.00%).

Respondents also actively encouraged provision from:

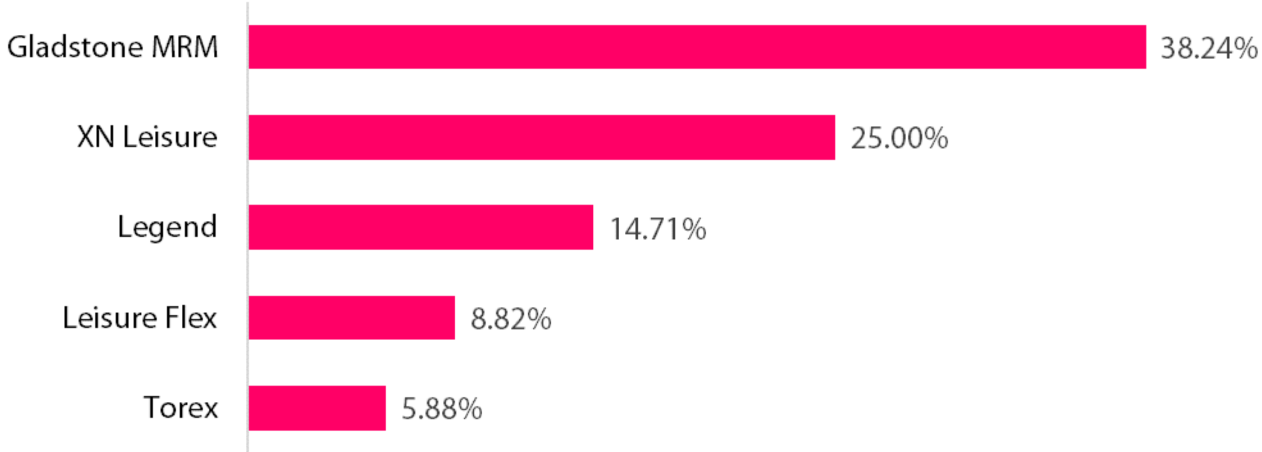
- People with disabilities and/or impairments
- Carers
- Care leavers and looked after young people
- Those living in areas of regeneration or on a low income
- Homeless people
- Students
- Armed forces personnel
- Those retired due to ill health
- Those in receipt of certain allowances
- Companies through discounts
- Referrals due to poor mental and/or physical health

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



61.04% of respondents have been commissioned by their local Health Board to provide GP referral services, 35.06% to provide weight loss programmes, 32.47% to provide exercise programmes, 12.99% to provide pupil weight and measurement services and 7.79% to provide day care services. 24.68% have not been commissioned to provide any of the above services.

Which software package do you use for managing leisure?

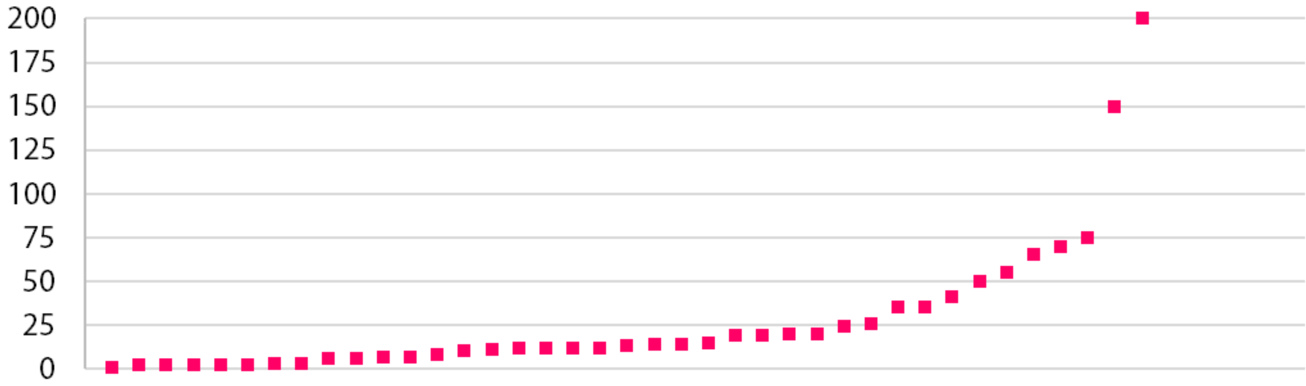


The most popular software package for managing leisure among respondents is Gladstone MRM (38.24%), followed by XN Leisure (25.00%), Legend (14.71%), Leisure Flex (8.82%) and Torex (5.88%). Other packages in use included Omnico Clarity, Perfect Gym, EZ Runner and Total Control Fidelity.

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

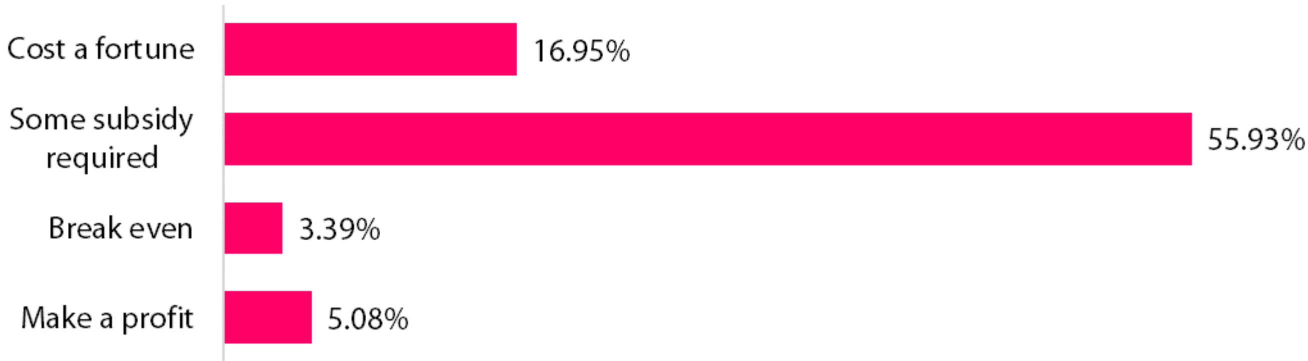
The majority of respondents have not established any new pitches over the last 2 years (59.32%).

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



Survey respondents maintained anywhere from 1 pitch up to 200 sports pitches.

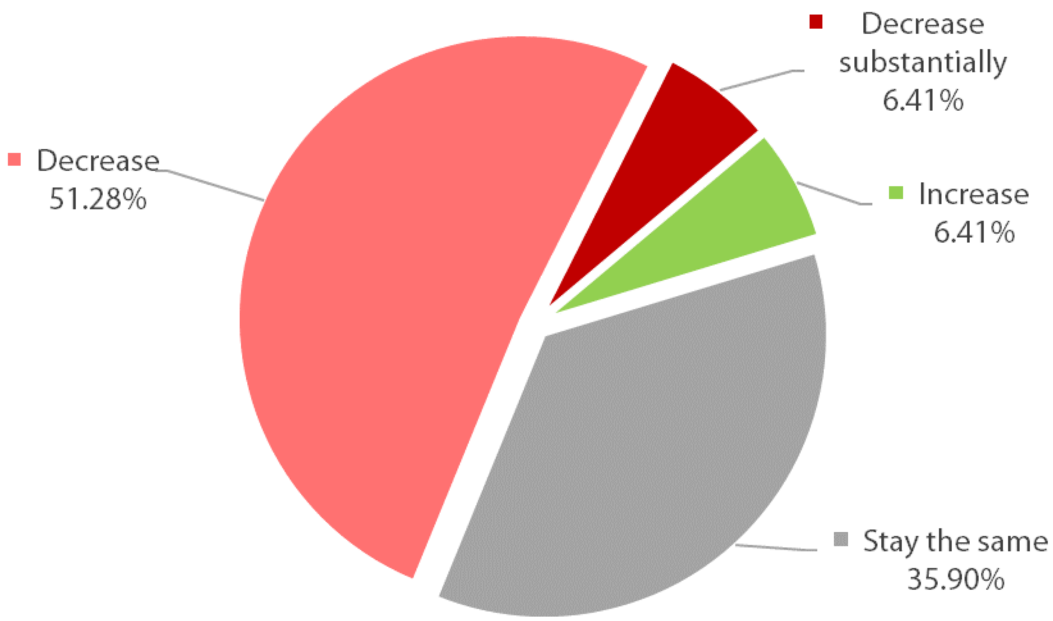
What is the financial cost of pitches to the Council?



Most of the respondents reported that some subsidy was required towards the cost of pitches to the Council (55.93%). Only 5.08% said that their pitches made a profit.

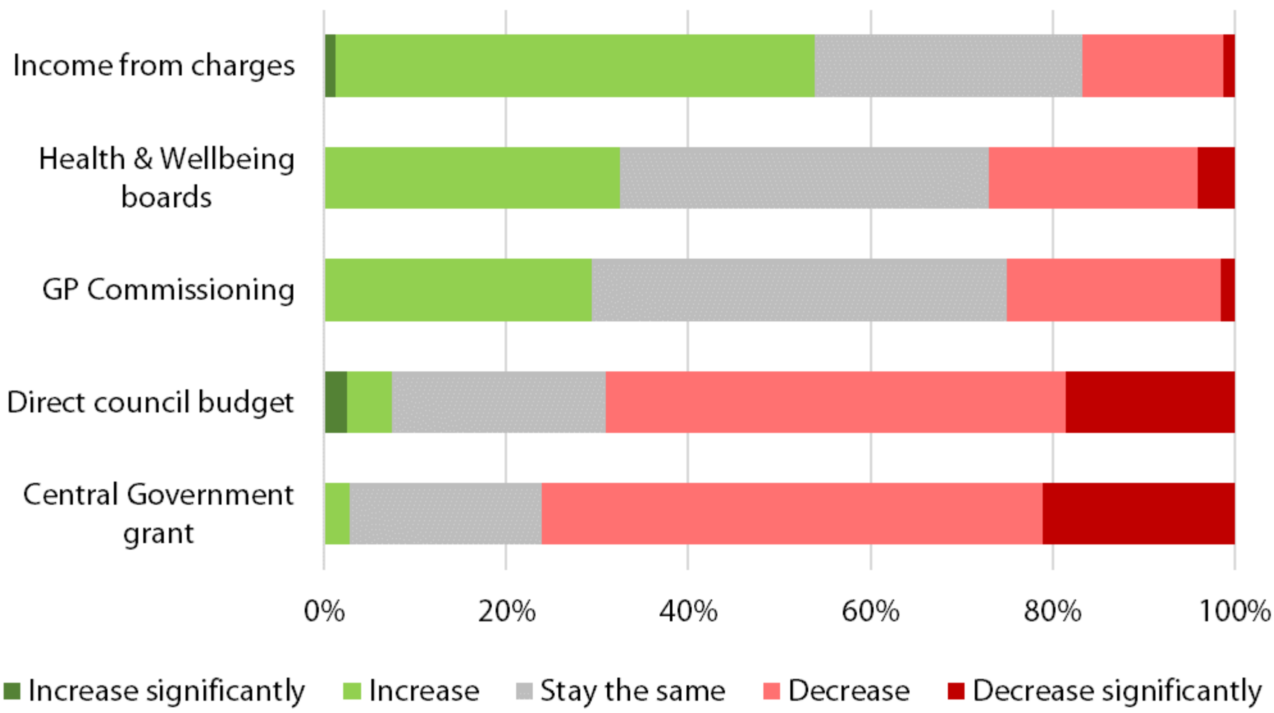
Section 2 - Funding

Overall – How do you expect the leisure budget to change next year?



The majority of respondents expect the leisure budget to either decrease (51.28%) or decrease substantially (6.41%) next year. Only 6.41% expect that their budget will increase.

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



51.22% of respondents expect that income from charges will increase, with 28.05% thinking it will stay the same and 15.85% expecting it to decrease.

29.27% of respondents expect that funding from Health & Wellbeing boards will increase, 36.59% think it will stay the same, and 24.39% think it will decrease.

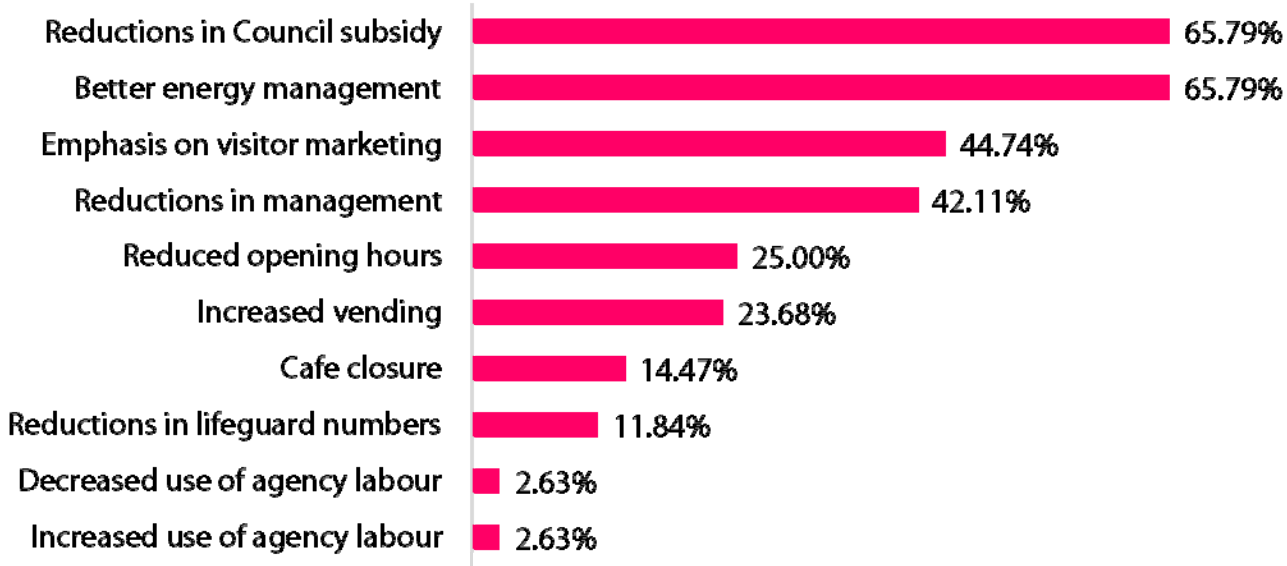
24.39% expect that funding from GP Commissioning will increase, with 37.8% thinking it will stay the same, and 20.73% expecting this to decrease.

Only 7.32% expect their funding from direct council budget to increase, 50.00% expect this to stay the same and 68.29% expect their direct council budget to decrease.

Only 2.44% of respondents expect the Central Government grant to increase, 18.29% expect it to stay the same, and 65.85% expect it to decrease.

Section 3 – Expected Changes

With the continuing pressures on value for money and productivity, how do you expect the service to change over the next year?



The majority of respondents expect reductions in Council subsidy (65.79%) and better energy management (65.79%), with 44.74% expecting emphasis on visitor marketing and 42.11% expecting reductions in management.

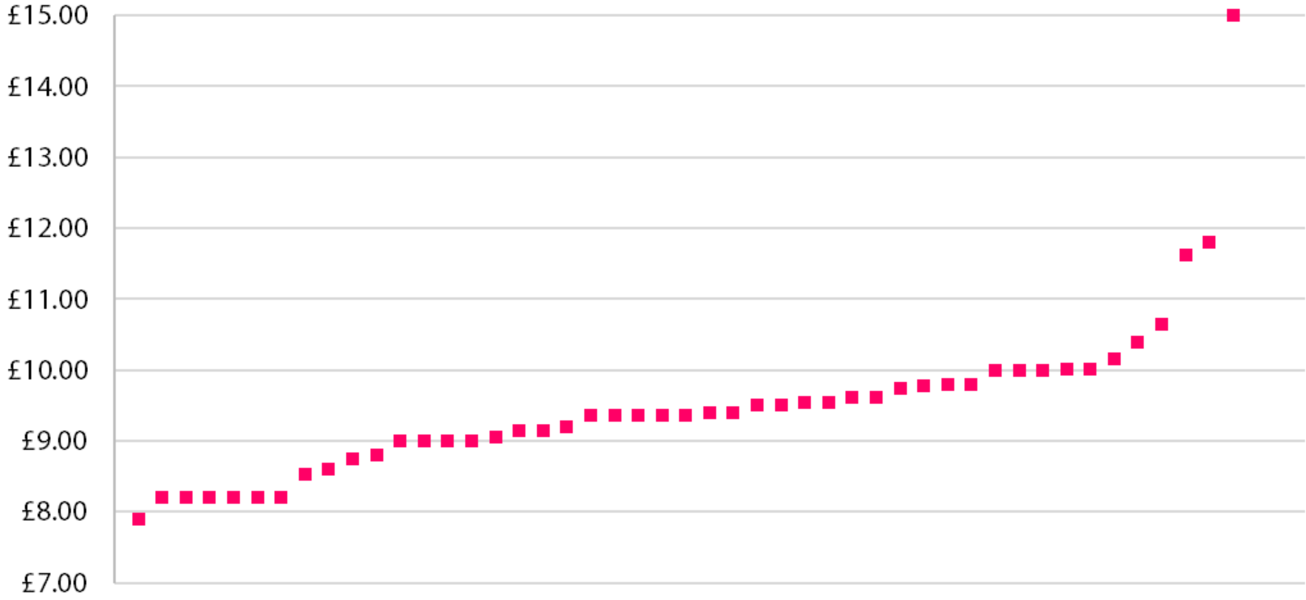
Other changes expected from individual respondents include:

- New fitness classes and junior activities
- Invest to save in capital programmes
- Asset transfer of some facilities
- Increased programming for health and wellbeing, GP referral activities, escape pain programmes
- Reduction in fitness gym staffing
- Automation and cashless transactions
- Reduction in cleaning and gym staff hours
- Pool closures
- Increased commercialisation agenda

- Centre closures
- Use of technologies
- Realignment of services with demand
- Increase in health commissioning work

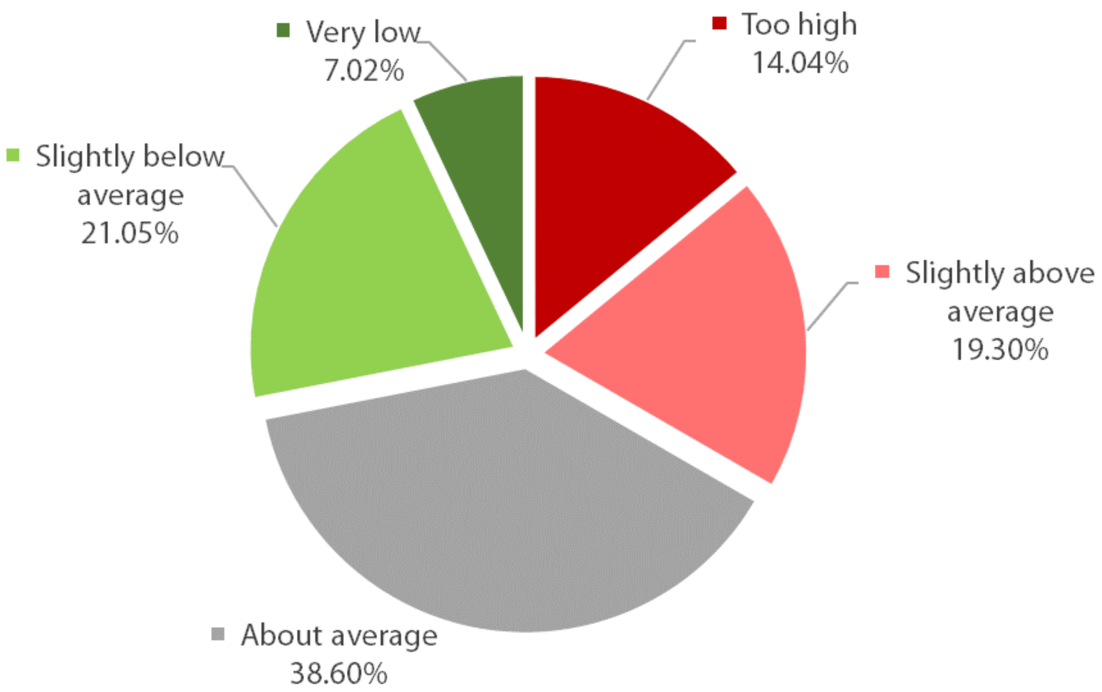
Section 4 – Staffing

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



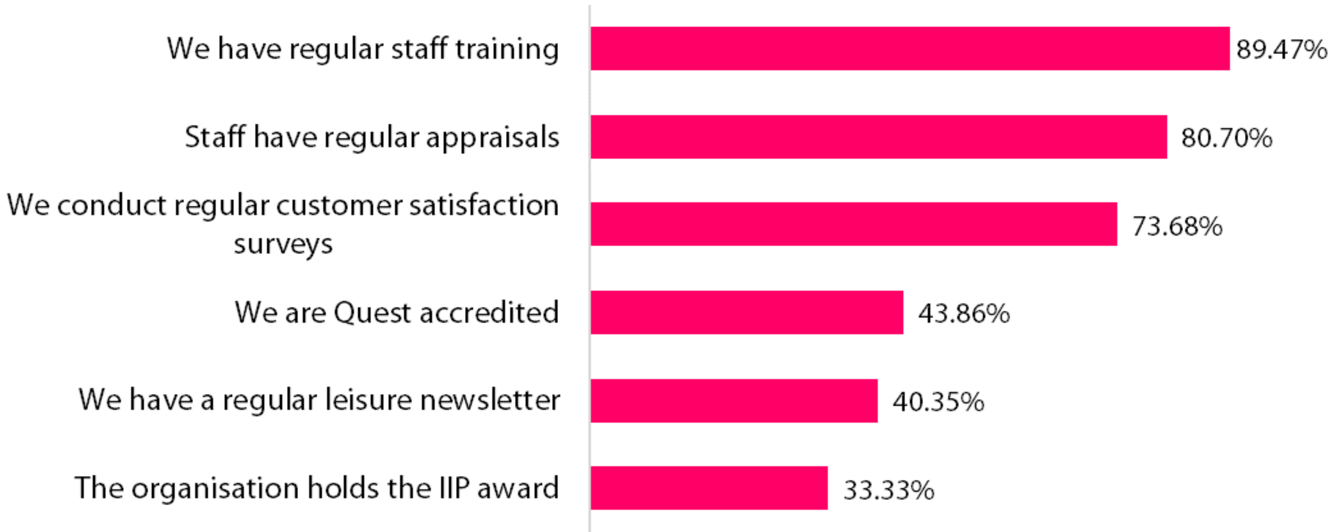
The basic current hourly rate for leisure staff before tax was an average of £9.49, a median of £9.49 with a low of £7.90 and a high of £15.00.

Are staff absence levels at an acceptable level?



Opinions on whether staff absence levels were at an acceptable level were relatively split between those who felt it was either 'slightly above average' or 'too high' (33.34%), those who thought it was about average (38.60%) and those who answered 'slightly below average' or 'very low' (28.07%)

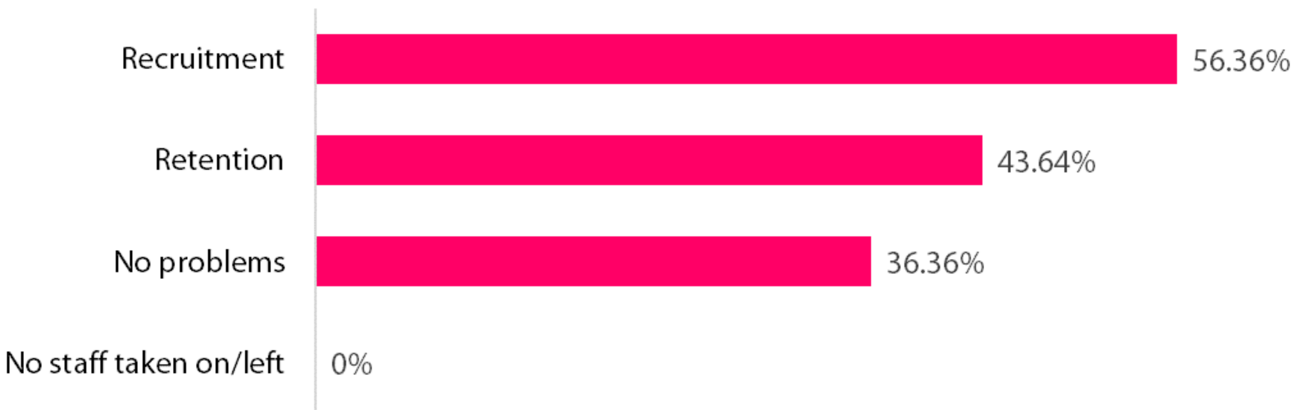
Staff Training and Quality - Please tick all that apply



On the question related to staff training and quality indicators held by responding councils, 89.47% have regular staff training, 80.70% have regular staff appraisals, 73.68% conduct regular customer satisfaction surveys, 43.86% are Quest accredited, 40.35% have a regular leisure newsletter and 33.33% hold an Investors in People award.

Where have you had difficulty recruiting or retaining staff (over the last 12 months)?

Lifeguards

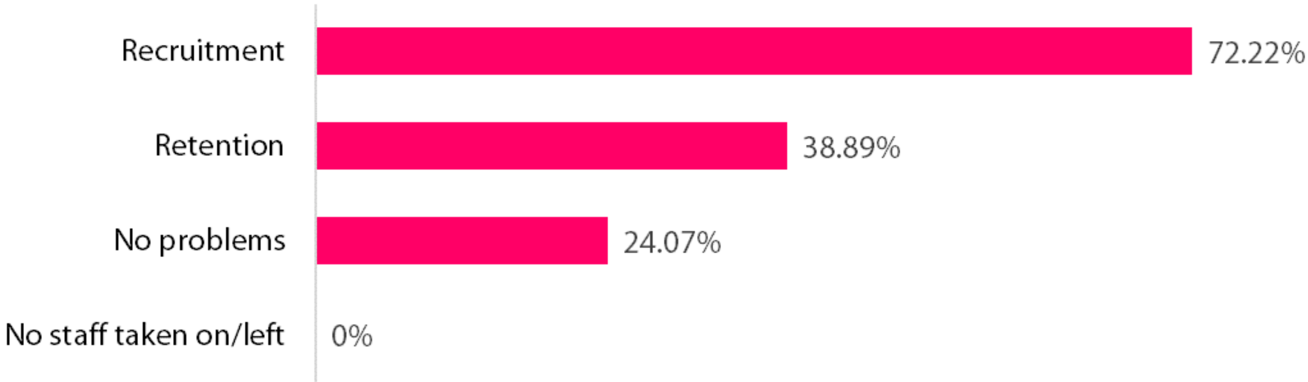


56.

36% of respondents have had difficulties with recruiting lifeguards in the past 12 months and 43.64%

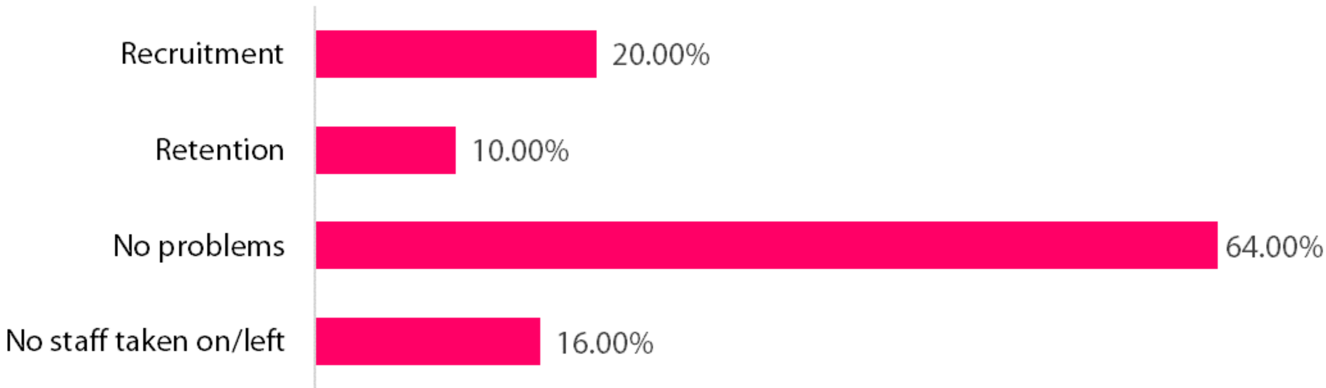
have had issues retaining lifeguards. 36.36% reported as having no problems with the above. All respondents reported that they had lost and replaced members of staff during the year.

Instructors



72.22% of respondents have had difficulties with recruiting instructors in the past 12 months and 38.89% have had problems with the retention of staff. 24.07% reported that they had no problems with either recruitment or retention. All respondents experienced staff leaving and being replaced.

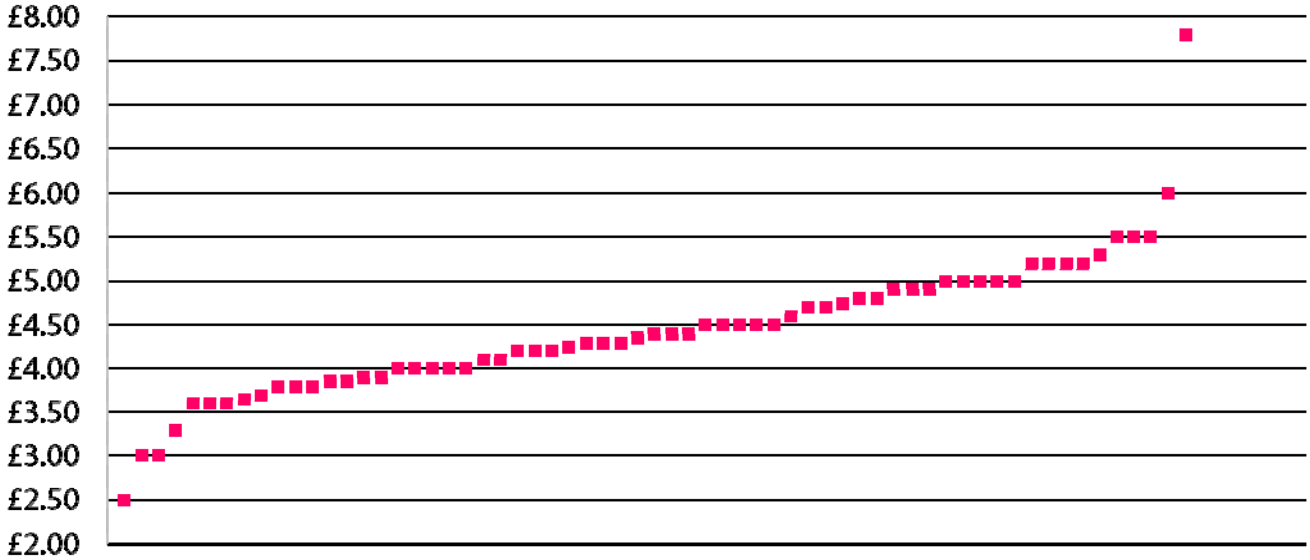
Technical / Managerial staff



Compared to the issues faced with employing lifeguards and instructors, only 20.00% of respondents had difficulties recruiting technical / managerial staff, and only 10.00% had issues retaining them. 64% reported as having no problems with either of the above, and 16.00% of respondents said that no technical / managerial staff had been taken on or left. This suggests that these roles tend to be more stable than those held by lifeguards and instructors.

Section 5 - Charges

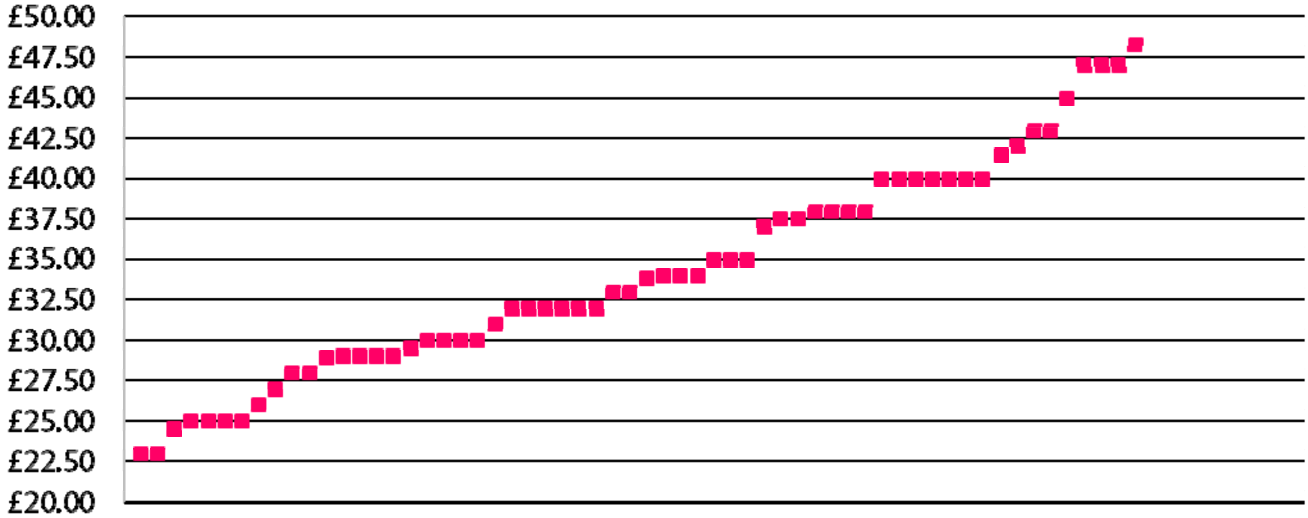
What is the charge for a single adult swim? **Average price: £4.43**



The charge for a single adult swim ranged from £2.50 to £7.80, with an average price of £4.43.

Typical monthly membership fee

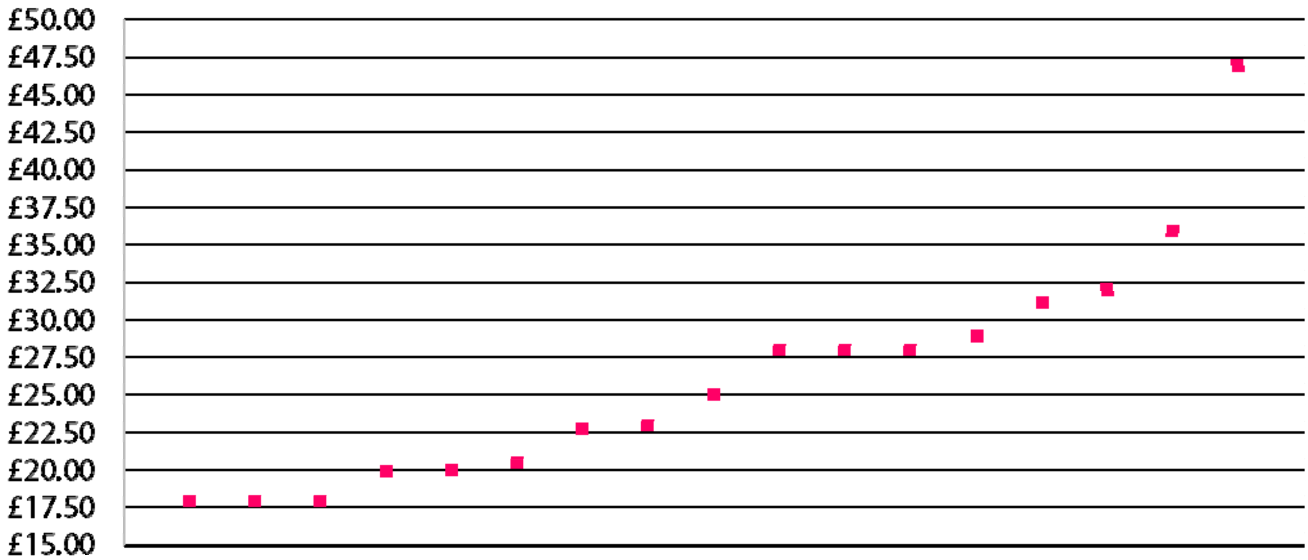
Full membership **Average price: £34.19**



The typical monthly full membership fee ranged from £23.00 to £48.30, with an average price of £34.19.

Off-peak membership

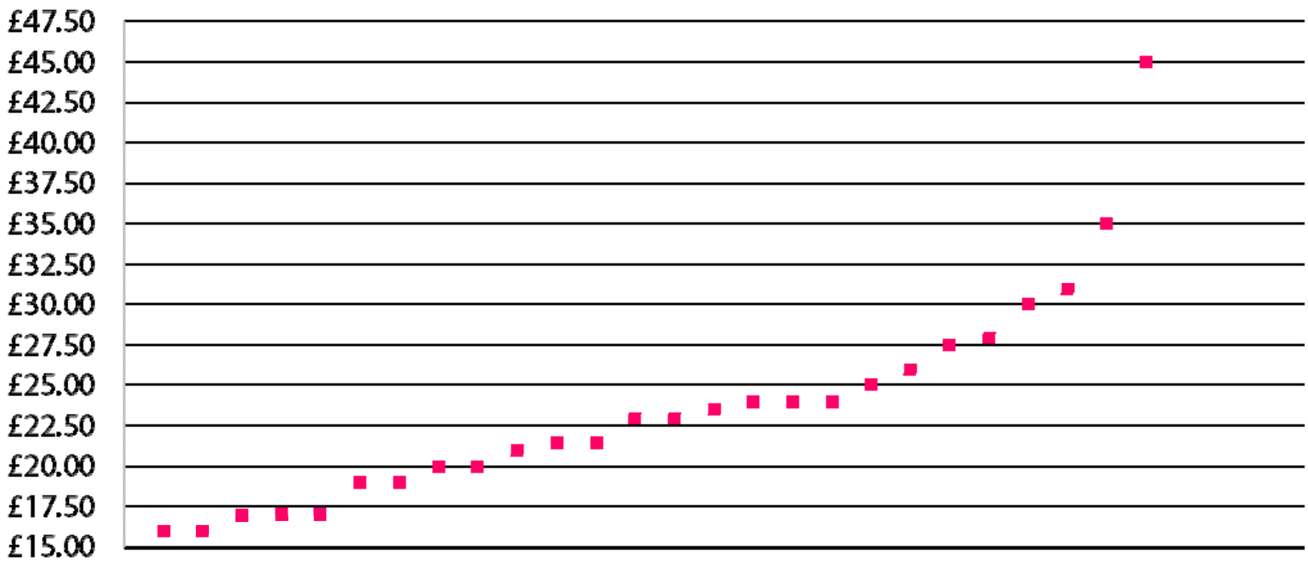
Average price: £26.14



The charge for off-peak membership was not offered by as many authorities, but for those that did offer one the charge ranged from £17.99 to £47.00, with an average price of £26.14.

Swim only

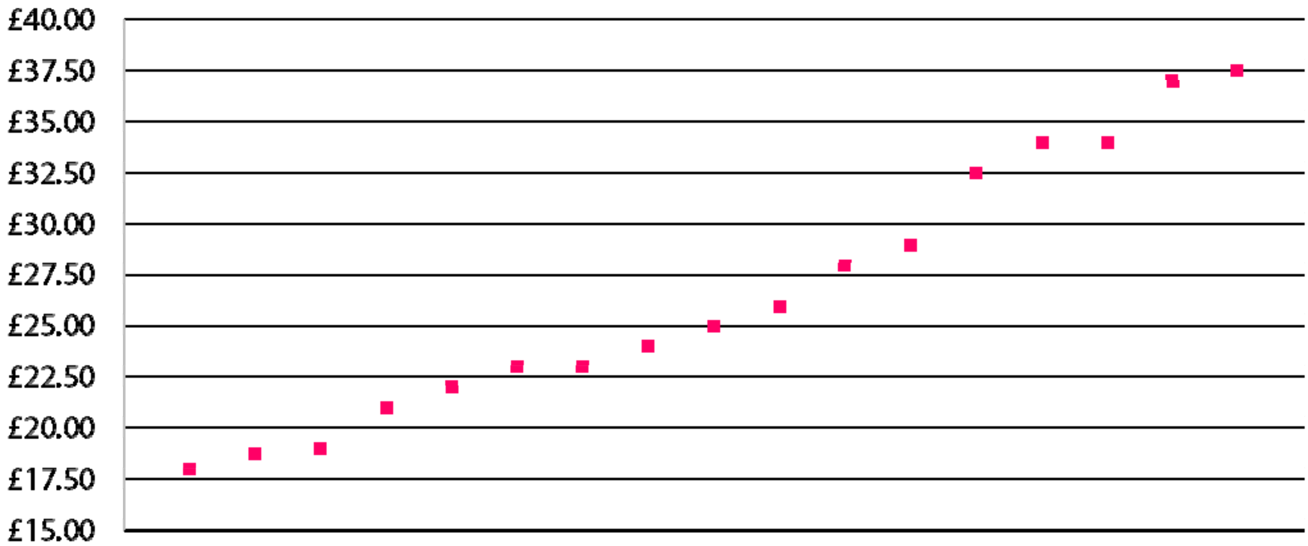
Average price: £23.61



Swim only membership charges ranged from £16.00 to £45.00, with an average price of £23.61.

Gym only

Average price: £26.57



Gym only memberships ranged from £17.99 to £37.50, with an average price of £26.57.

Do you have a joining fee?

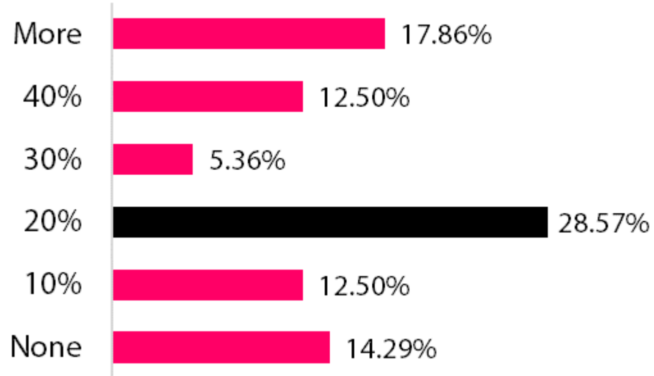
44.12% of respondents reported that they did have a joining fee for their leisure facilities. The charge for this was anywhere from £10 up to £40, with around £20 being the most common fee, and that this fee was occasionally waived as part of special promotions.

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

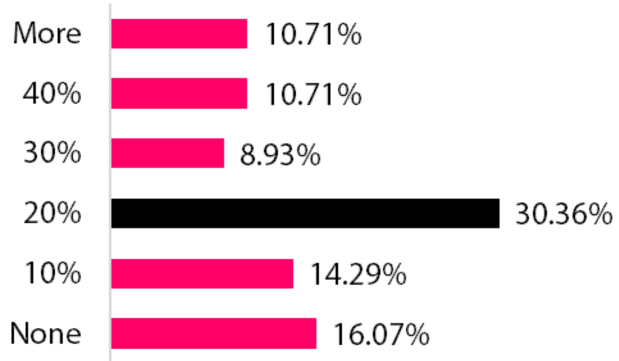
The majority of respondents offered monthly contracts (73.53%), monthly non-contracted (60.29%) and 12 months prepay (69.12%) options. Only 8.82% and 5.88% offered 3 and 6 month prepay options.

Membership package discounts offered

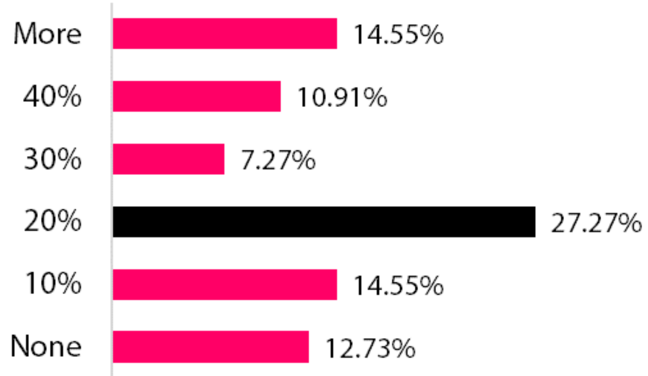
Low incomes



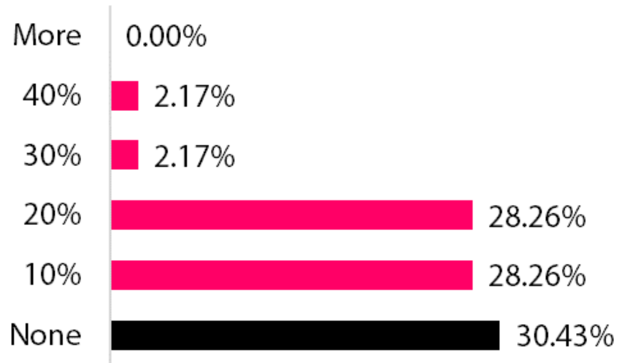
Over 65s



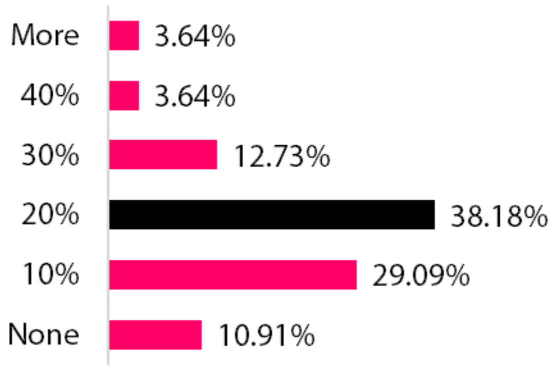
Disability



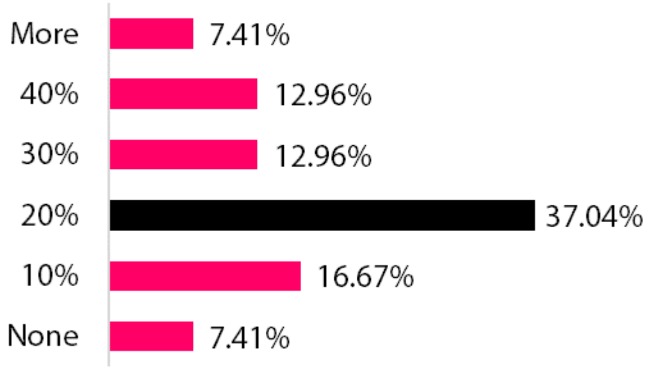
Couples



Corporate

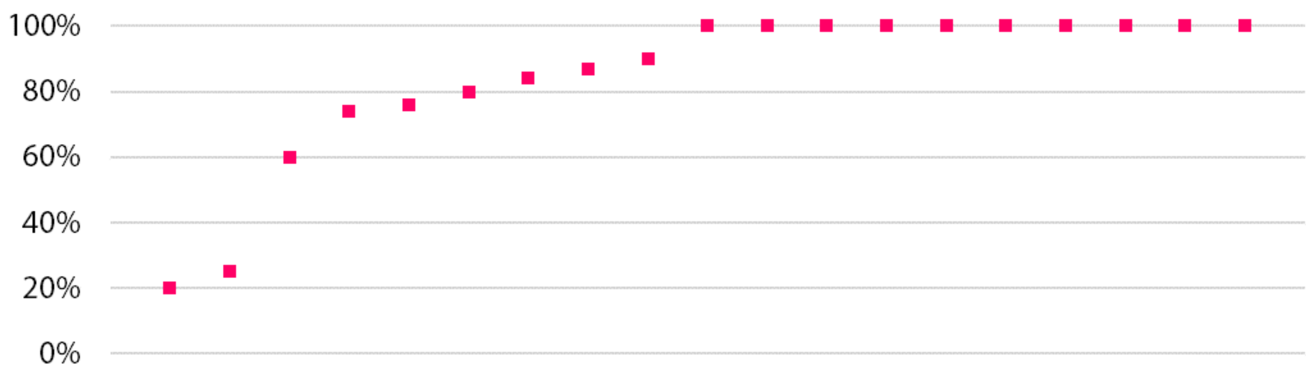


Students



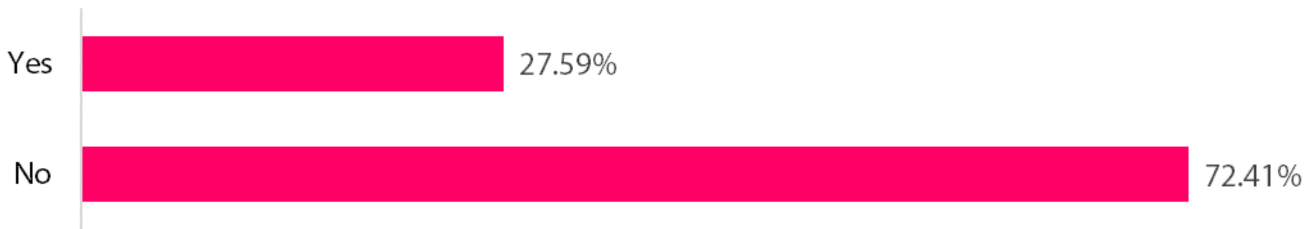
Responding councils offer a variety of membership package discounts. The most popular percentage amount for each of the categories was around 20%, except for couples discounts which nearly a third of councils did not provide.

What is the percentage split of your membership base? (Peak %)



The table above shows that responding councils generally have a much higher peak membership, except for two respondents who only had 20% peak / 80% off peak and 25% peak / 75% off peak.

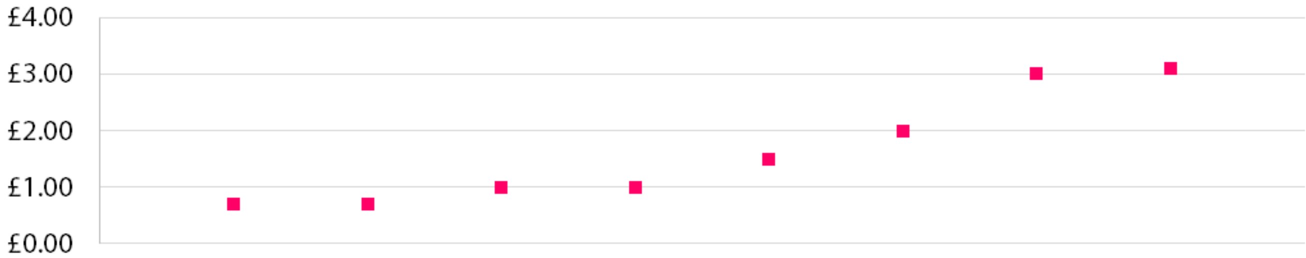
Do you charge for parking at any of your leisure centres?



The majority of respondents did not charge for parking at any of their leisure centres (72.41%).

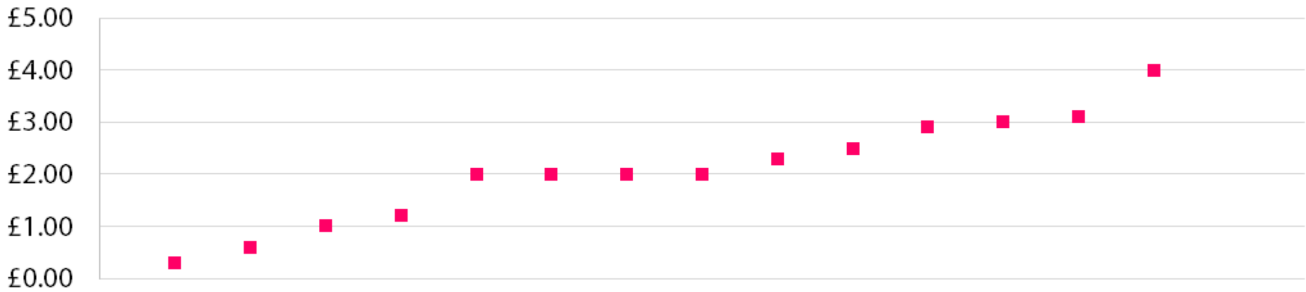
If you charge for parking, what does it cost?

One hour — Average: £1.63



Among the minority of respondents that do charge for parking at leisure centres, the average cost for one hour was £1.63, although many respondents indicated that they provided the first hour of parking for free.

Two hours — Average: £2.06

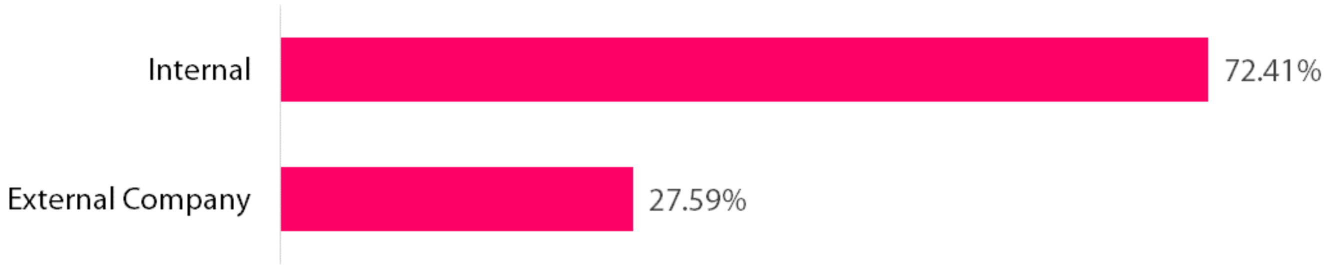


The average charge for parking for two hours was £2.06.

Do you refund a proportion of parking charges to centre users?

The majority of respondents reported that they do refund a proportion of parking charges to leisure centre users (55.56%).

Who manages the direct debit administration?



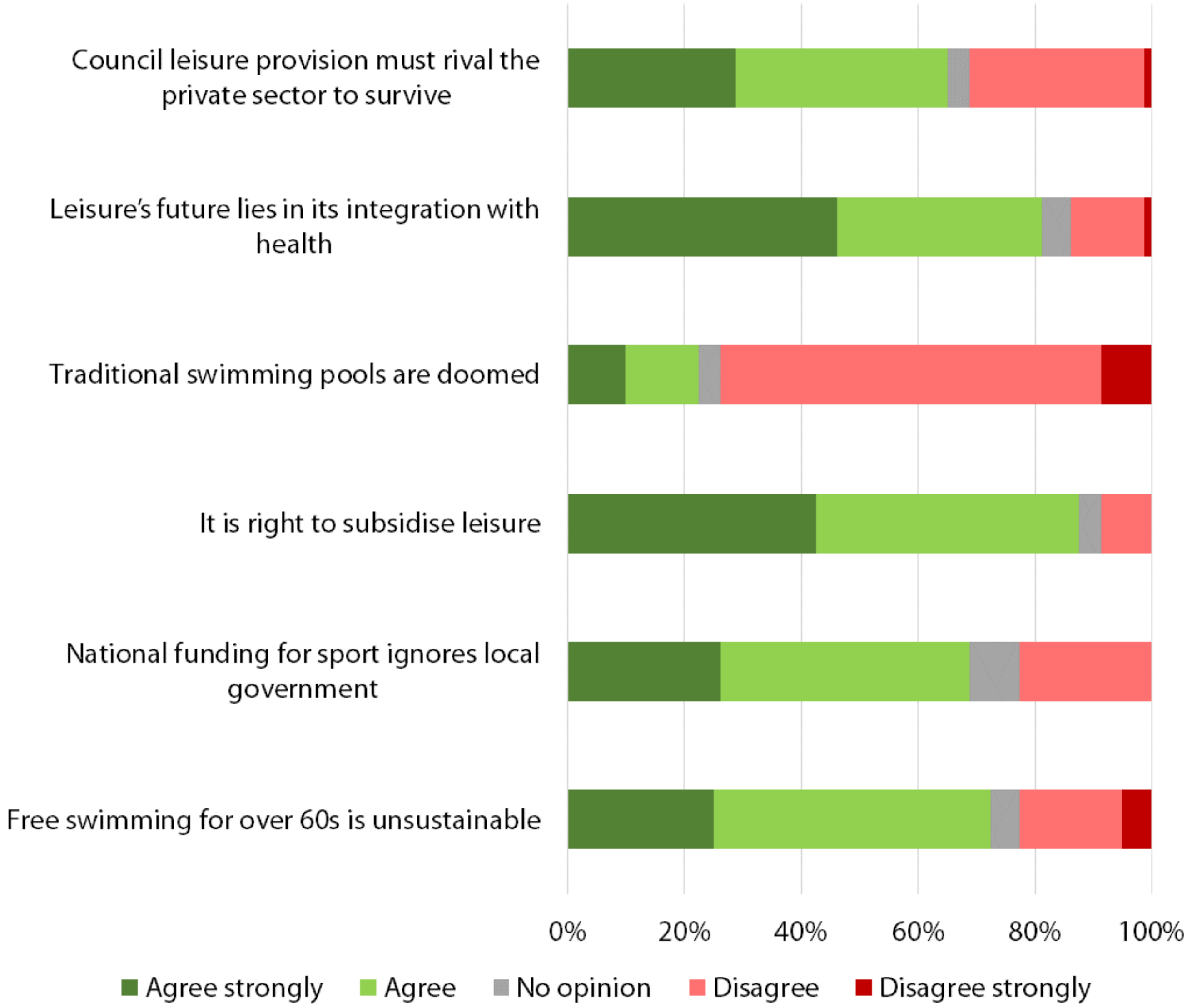
72.41% of respondents manage direct debit administration internally, and 27.59% use an external company.

Who chases debtors?

62.75% of respondents chase debtors internally, and 37.25% use an external company.

Section 6 - Opinions

Please give your opinion on the following statements:



Other opinions held by individual local government officers and managers of sports and leisure services included:

- Leisure's future can be strengthened through health integration
- The quality of our commercial offer has to rival the private sector, but we have the benefit in being able to contribute to the wider agendas (e.g. health and wellbeing, youth diversionary programmes)
- The rise of the private sector leisure operators raises questions as to why local government still needs to fund or subsidise leisure

- Council Leisure providers need to be more efficient, however historical employment rights, issues and policy does not favour this to happen
- Free swimming for 60+ as a blanket policy needs to be replaced so that concessions are based upon need

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

Some of the areas identified as areas for growth by respondents included:

- Community focussed programmes
- Growth in swimming lessons
- Gymnastics for young people
- Integration with health services
- Outdoor fitness
- People with long-term health conditions
- Increase in GP referrals
- Wellbeing classes
- Modernising classes with changing trends
- Children and families activities
- Building new leisure centres
- Young people
- Referrals from health
- Fitness testing
- Layout and equipment housed in gyms
- Group swimming lessons
- Outdoor play and adventure
- Engaging more with communities
- Child obesity programmes
- Online/virtual classes from home
- Modernising communication
- Investment into core gym products
- Building relationships with CCGs
- Off peak fees and charges
- New synthetic football pitches
- Bidding for grant aid
- Home market for leisure
- Soft play, climb, indoor skating
- Group fitness
- Community outreach
- Local population growth
- Activity class programme
- Development of 3G pitches
- Gymnastics
- Leisure centres as health hub locations
- Trampolining

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

Areas of future decreases identified by survey respondents included:

- Gym attendances dropping
- Decline in adult football demand
- Less front of house (more online/self serve)
- Reduction in staff catering provision
- Traditional use of sports halls
- Less use of centres by schools
- Less fitness advisors in gyms
- Reduction in community centre service

- Reduction in fitness facilities
- Golf
- Cafes
- Creches
- Support for local clubs
- Pool operations and openings
- Athletics
- Closure of leisure centres
- Sports development programmes

Local Authority Sports and Leisure Services

State of the Market 2019

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
- Climate Change and Renewable Energy Network
- Sports and Leisure Management
- Vehicle Maintenance and Transport
- Waste Management, Refuse Collection and Street Cleansing