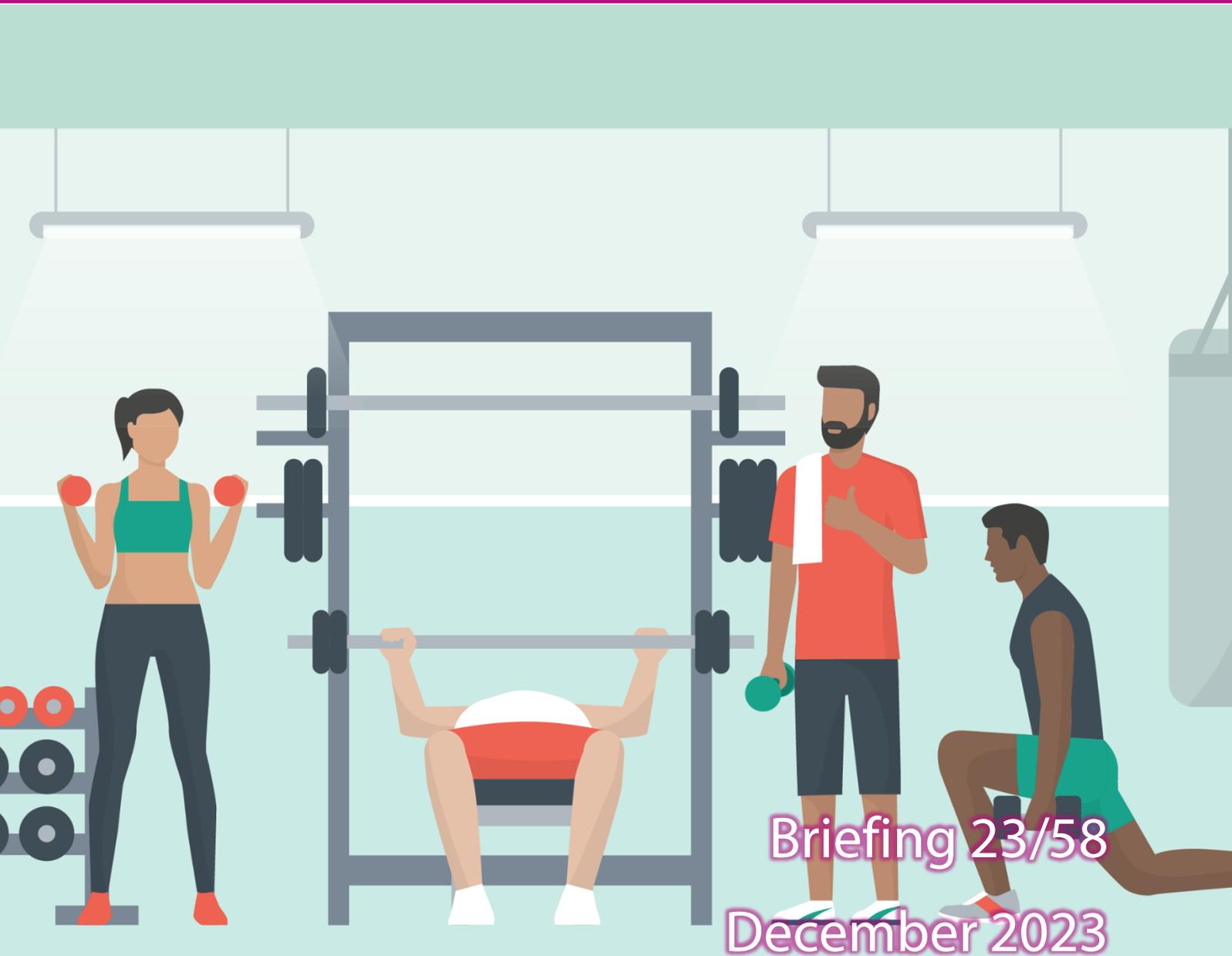




association for public service excellence

State of the Market 2023

Sports and Leisure



Briefing 23/58
December 2023

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State of the Market 2023

Sports and Leisure

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.

Results at a glance

Workload

Percentage expecting the workload of the leisure section to increase over the next 12 months **82.76%**

Staffing

Average basic current hourly rate for leisure staff (before tax) **£10.91**

% of respondents who say staff absence levels are 'slightly above average' or 'too high' **14.71%**

% of respondents with difficulty recruiting lifeguards **85.29%**

% of respondents with difficulty recruiting instructors **82.35%**

% of respondents with difficulty recruiting technical / managerial staff **26.47%**

Finance and charges

% expecting the leisure budget to either decrease or decrease substantially **43.48%**

Average charge for a single adult swim **£5.25**

Average typical monthly full membership fee **£33.77**

% of respondents with a joining fee for facilities **46.15%**

% of respondents who charge for parking at any of their leisure facilities **41.18%**

Service delivery

% of respondents who have established any new pitches over the last 2 years **27.03%**

% of respondents who answered 'some subsidy required' in the financial cost of pitches to the Council **10.34%**

Expected changes over the next year

% of respondents expecting reductions in Council subsidy	46.67%
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% of respondents expecting reductions in management	22.22%
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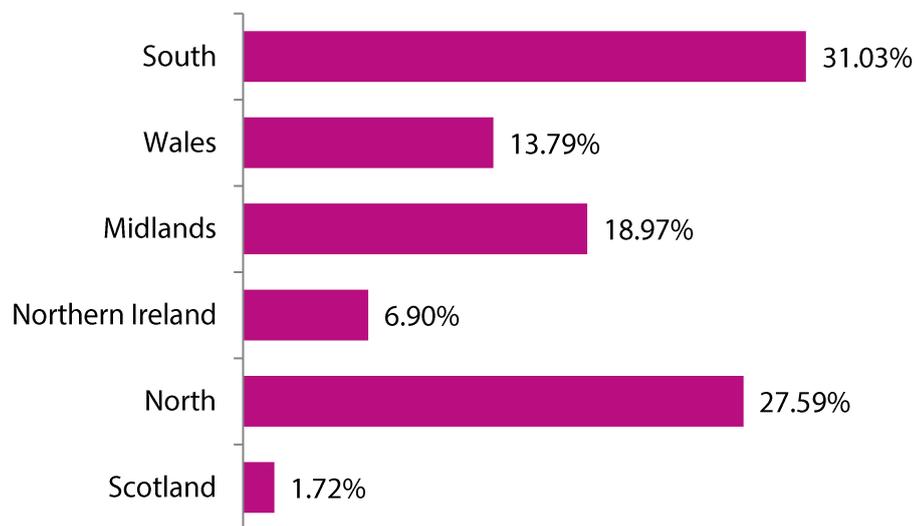
% of respondents expecting reduced opening hours	17.78%
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1 Introduction

APSE conducted an online survey during late summer and the Autumn of 2023. 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.

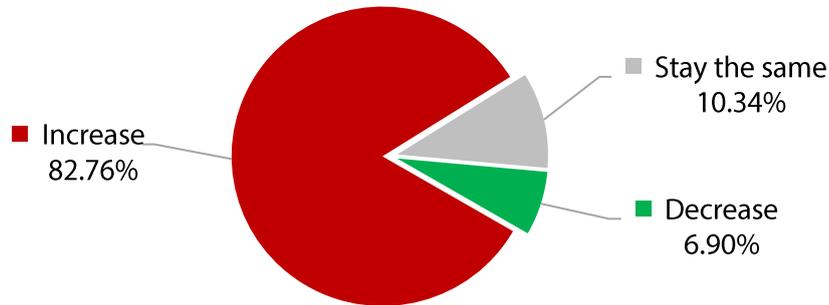
None of the questions were mandatory, so the total amount of responses differs from question to question. Individual details of respondents have been kept confidential. The results of the survey should be treated as a snapshot of current opinions of those working in sports and leisure services rather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

Survey respondents by location



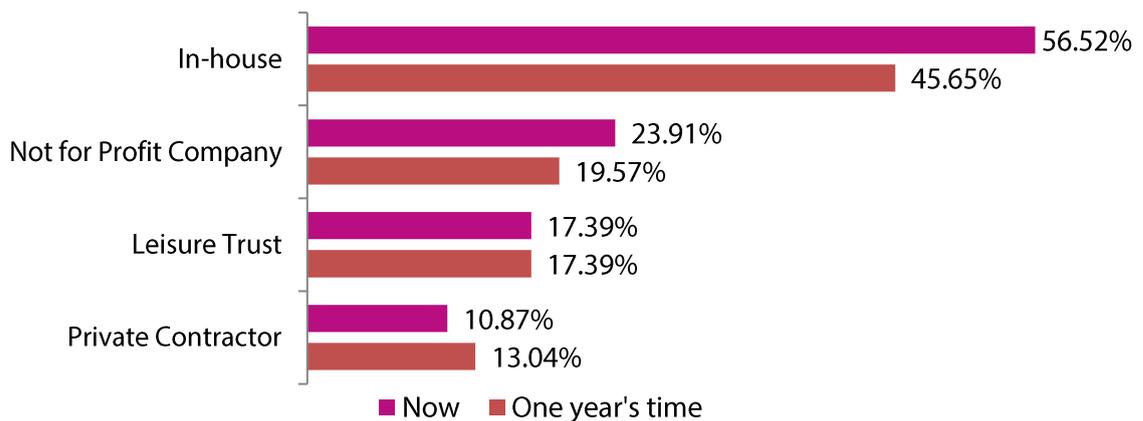
2 Service

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



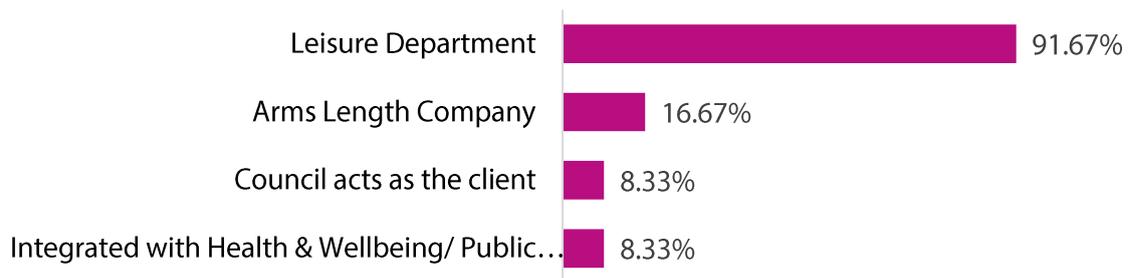
Respondents to the survey largely expect that the workload of the leisure section will increase over the next 12 months (82.76%) or stay the same (10.34%). Only 4 respondents (6.90%) felt that it would decrease.

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



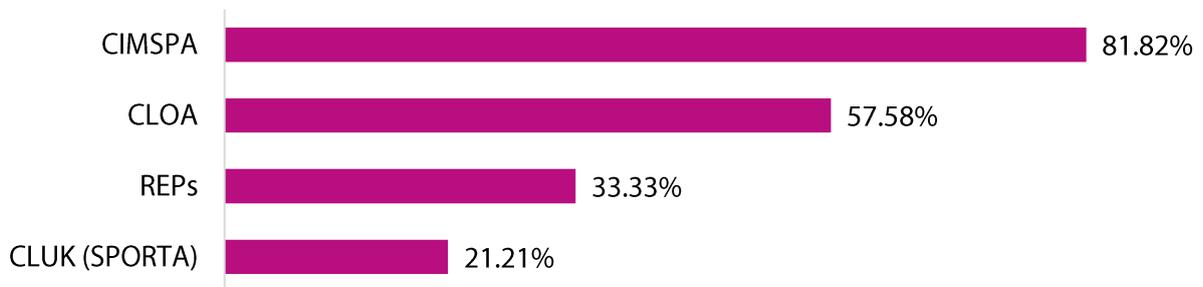
While the majority of respondents expected their service to be managed the same way in 12 months' time, 10.87% less expected to be managed in-house, 4.35% less expected to be managed by a not-for-profit company and 4.35% more expected to be managed by a private contractor. One respondent had consultants currently undertaking a review of their leisure services.

If in-house, which of the following apply?



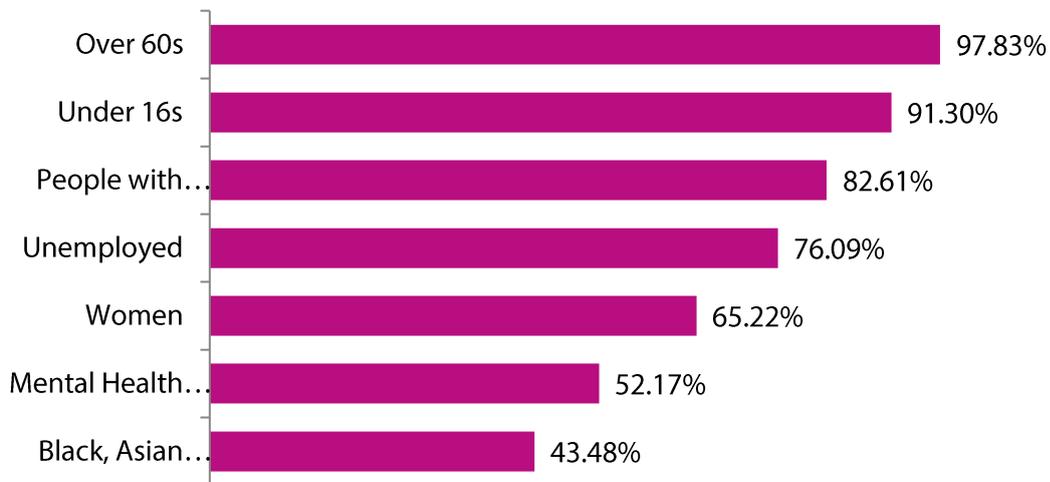
91.67% of in-house respondents are leisure departments, 16.67% are an Arms Length Company, 8.33% are integrated with Health & Wellbeing / Public Health, 8.33% have arrangements where the council acts as the client.

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



81.82% of respondents to the survey are a member of the Chartered Institute for the Management of Sport and Physical Activity (CIMSPA), 57.58% are members of the Chief Cultural & Leisure Officers Association (CLOA), 33.33% are members of the Register of Exercise Professionals (REPs) and 21.21% are members of Community Leisure UK (CLUK (SPORTA)). Respondents also identified being members of UK Active and the Welsh Sports Association.

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

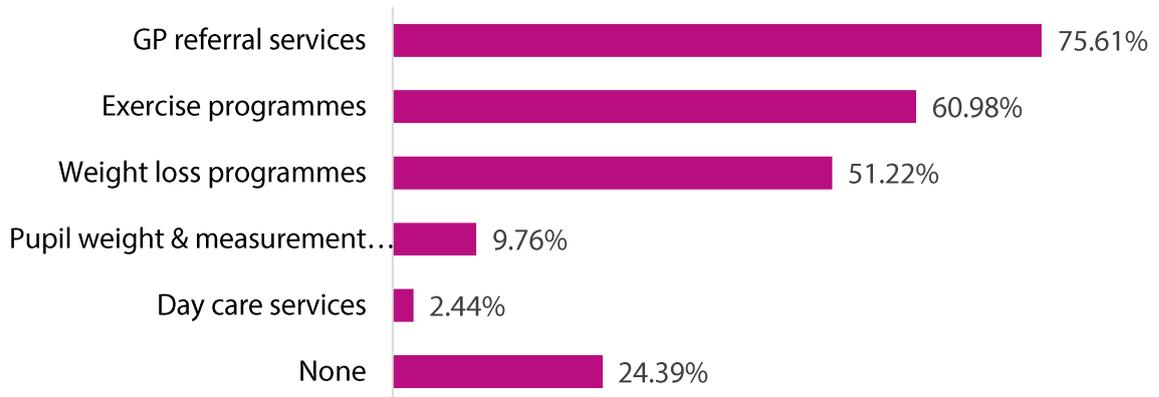


97.83% of respondents actively encourage participation from over 60s; participation is also encouraged from under 16s (91.30%), people with disabilities (82.61%), the unemployed (76.09%), women (65.22%), mental health support (52.17%) and BAME communities (43.48%).

Respondents also actively encouraged provision from:

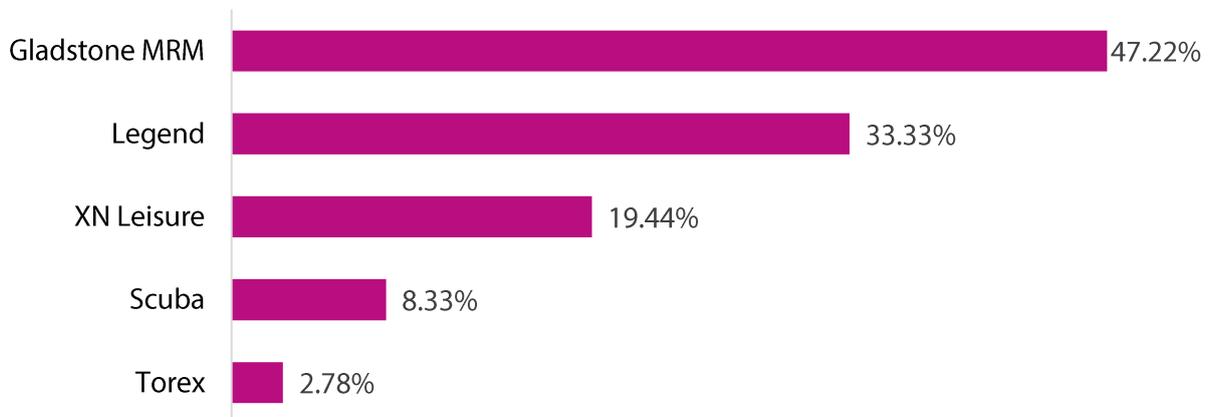
- Asylum seekers
- Community exercise
- Corporations
- Disadvantaged communities
- Elite athletes
- Medical referrals (e.g. rehabilitation)
- People with long-term conditions
- Veterans

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



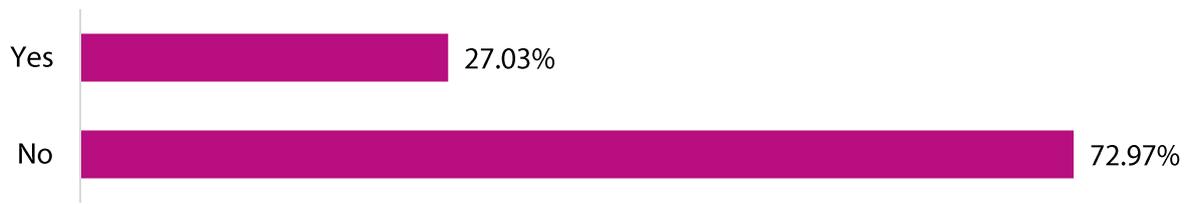
75.61% of respondents have been commissioned by their local Health Board to provide GP referral services, 60.98% to provide exercise programmes, 51.22% to provide weight loss programmes, 9.76% to provide pupil weight and measurement services and 2.44% to provide day care services. 24.39% have not been commissioned to provide any of the above services. Respondents have also been commissioned to provide support for cardiac rehabilitation, falls prevention, getting fit for surgery, long term COVID-19 and pain management.

Which software package do you use for managing leisure?



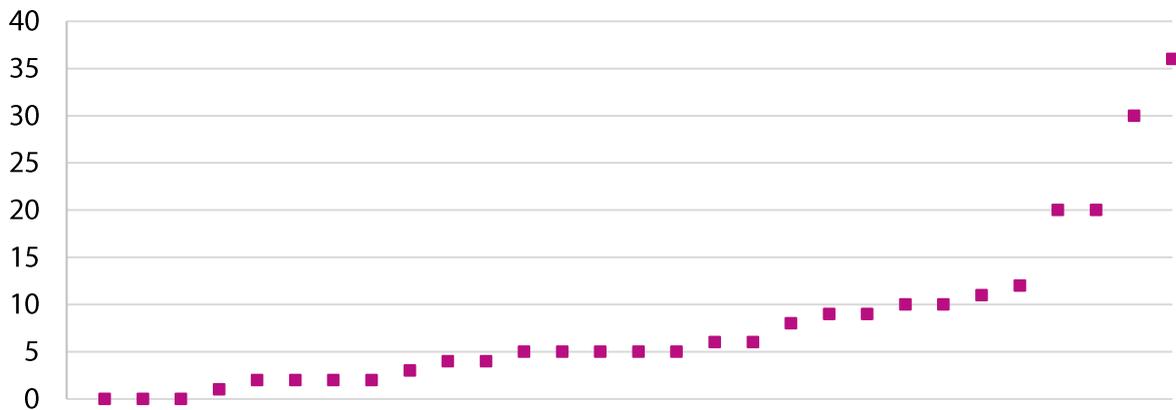
The most popular software package for managing leisure among respondents is Gladstone MRM (47.22%) followed by Legend (33.33%), XN Leisure (19.44%), Scuba (8.33%) and Torex (2.78%). Other packages in use included Course Pro, Flow and various in-house developed software.

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



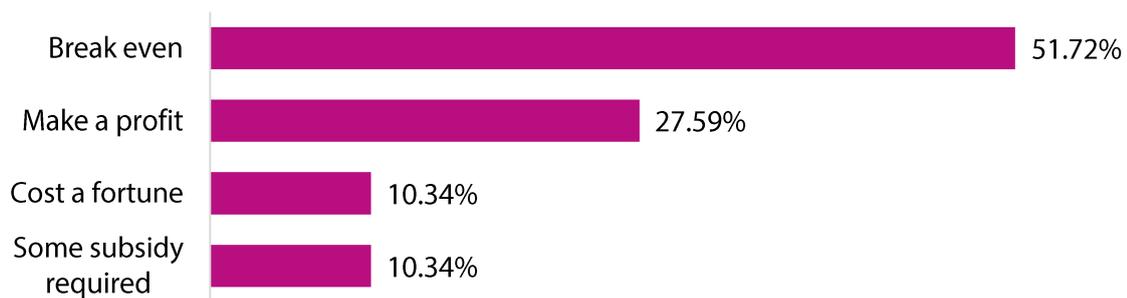
The majority of respondents have not established any new pitches over the last 2 years (72.97%).

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



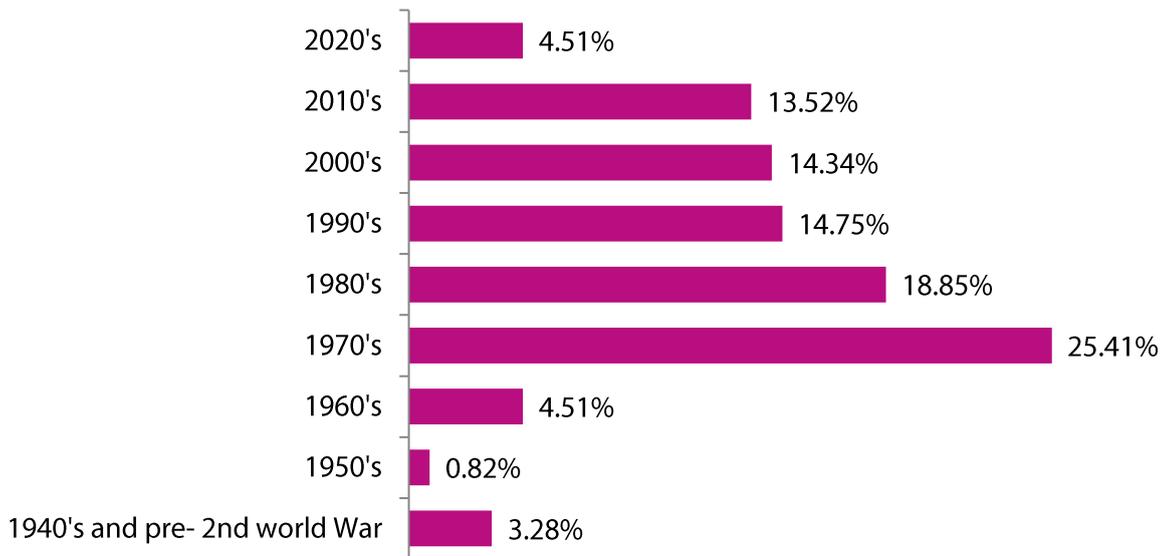
Survey respondents maintained anywhere from 1 pitch up to 36 sports pitches.

What is the financial cost of pitches to the Council?



Most of the respondents reported that their pitches break even (51.72%), with 27.59% making a profit. 10.34% felt these cost a fortune and 10.34% required some subsidy.

When were your leisure facilities first built?

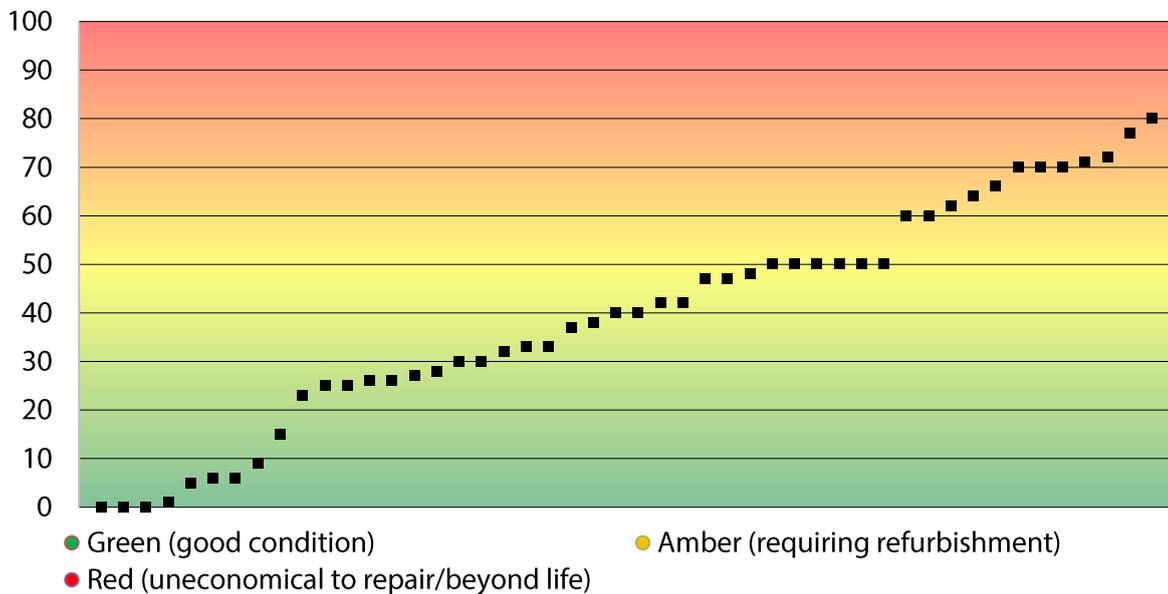


Most leisure facilities were built in the 1970s (25.41%) and 1980s (18.85%).

How many facilities do you have of each type?

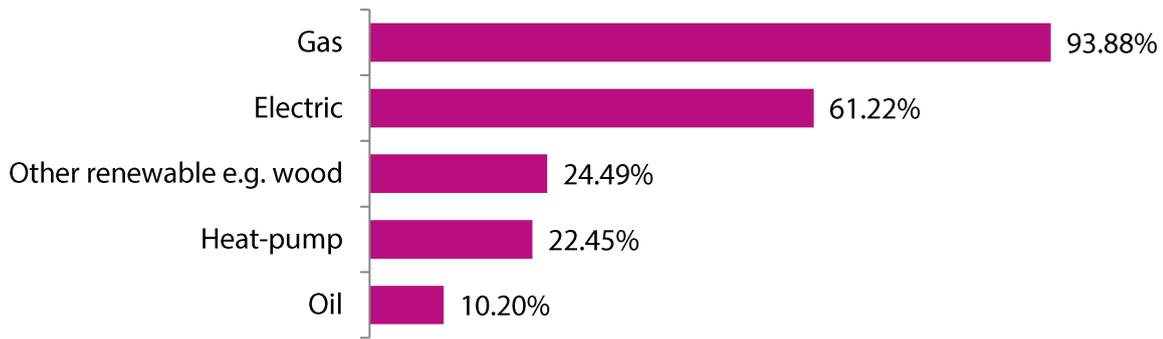
Respondents had between 1 and 3 gym only sites, 1 swimming only site and between 1 and 11 combined gym and swimming sites.

Overall, how would you rate your average facility?



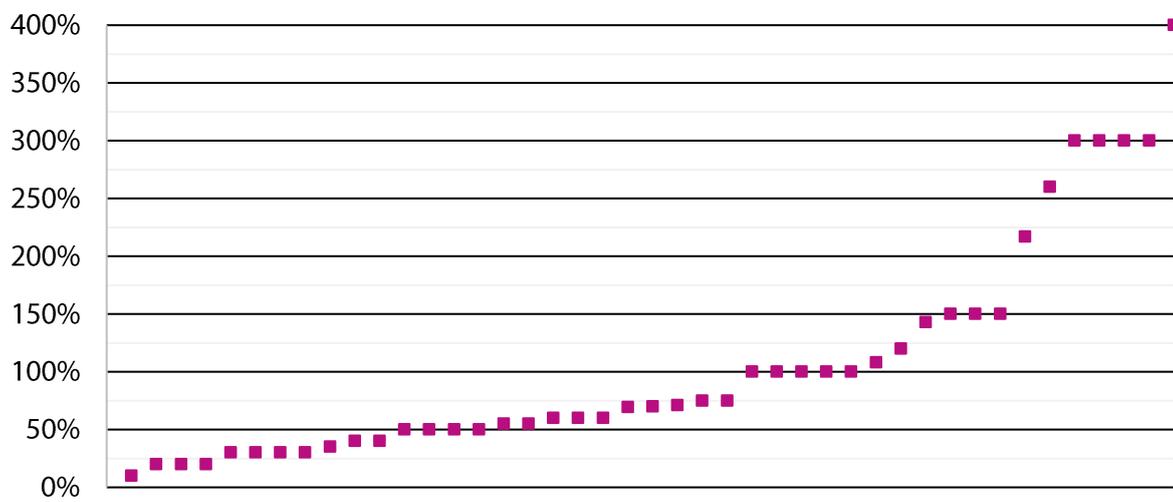
Respondents were asked to rate their average facility with green (0) indicating they were in good condition, amber (50) indicating they required refurbishment and red (100) indicating that they were uneconomical to repair and beyond life. The average response was 39.23 with a median of 40, indicating that the average facility was in reasonable condition but close to requiring refurbishment.

How are your facilities heated?



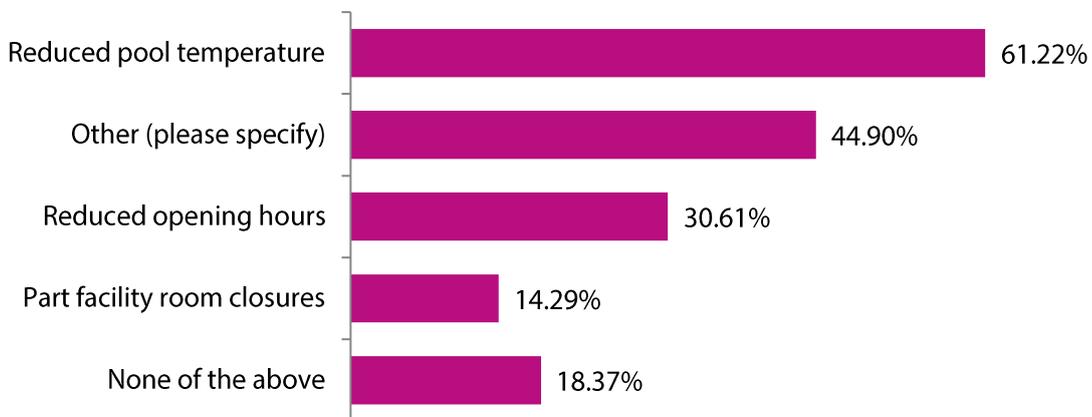
The most common methods of heating facilities were gas (93.88%) and electric heating (61.22%).

What has been the increase in energy cost over the last year?



The estimated average increase in energy falls between 10% and 400% with an average figure of 106% and a median of 70%.

What energy saving measures have you implemented due to increased energy costs?

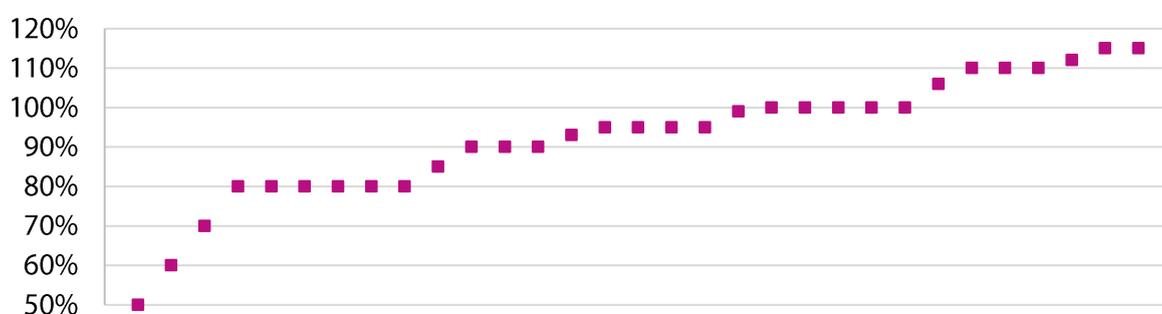


Other energy saving measures that have been implemented include:

- Infrastructure investments to reduce carbon emissions
- Reduced use of things like saunas and wave machines
- Conducted energy audits
- Pool covers
- LED lighting
- Air handling service and maintenance
- Customer and staff awareness
- Infrastructure investments to reduce carbon emissions
- Pool circulation pumps speed reduced overnight
- Solar panel installation
- Air source heat pumps
- Reduced pool depth
- Buying green electricity
- Operating temperature of boilers reduced

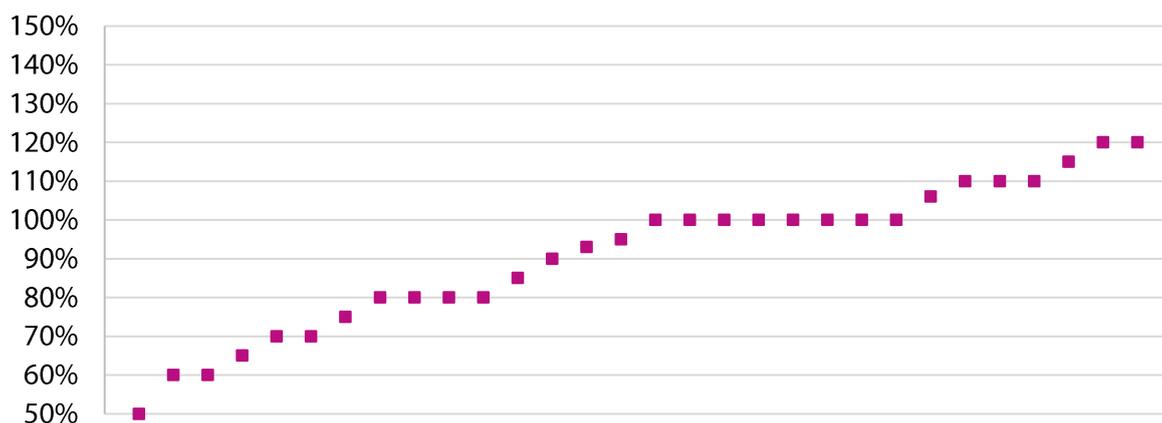
What is your estimate of the number of Gym and Swim attendances compared to pre-COVID (e.g. 70%)?

Gym attendance



The lowest reported attendance figure was 50% and the highest was 120%. Eight authorities reported higher attendance than before COVID-19. The average gym attendance is 93.28%.

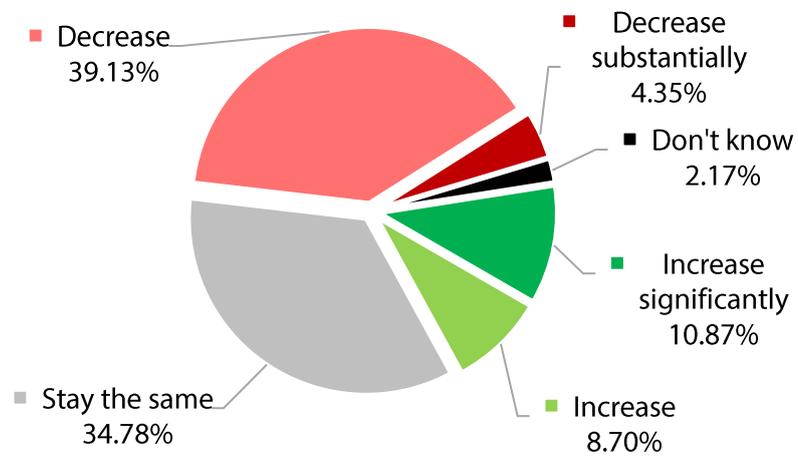
Swimming attendance



The lowest reported attendance figure was 50% and the highest was 145%. Eight authorities reported higher attendance than before COVID-19. The average swimming attendance is 92.5

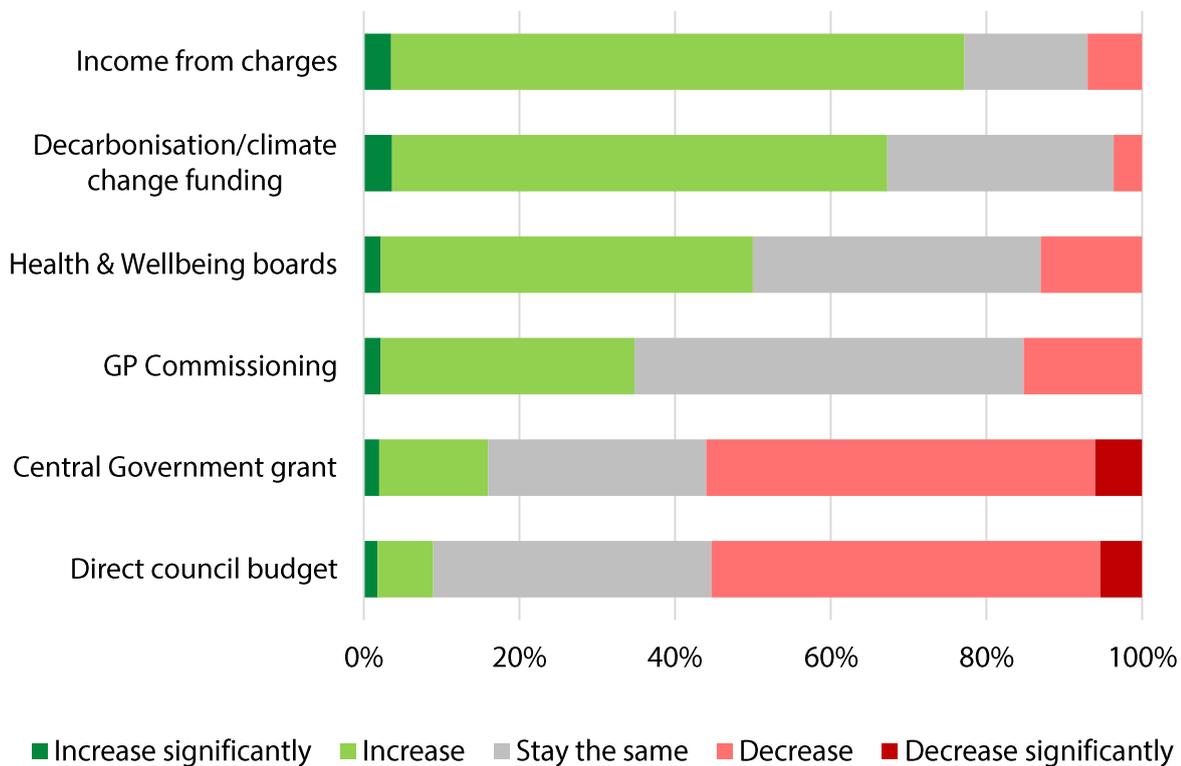
3 Funding

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



The majority of respondents expect the leisure budget to decrease (39.13%) or decrease substantially (4.35%). 39.13% expect the budget to stay the same, 8.70% expect the budget to increase or increase significantly (10.87%).

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



77.19% of respondents expect that income from charges will increase, 15.79% expect it will stay the same and 7.02% expect it to decrease.

67.27% of respondents expect that income from decarbonisation / climate change funding, 29.09% expect it to stay the same and 3.64% expect it to decrease.

50.00% of respondents expect that funding from Health & Wellbeing boards will increase, 36.96% think it will stay the same, and 13.04% think it will decrease.

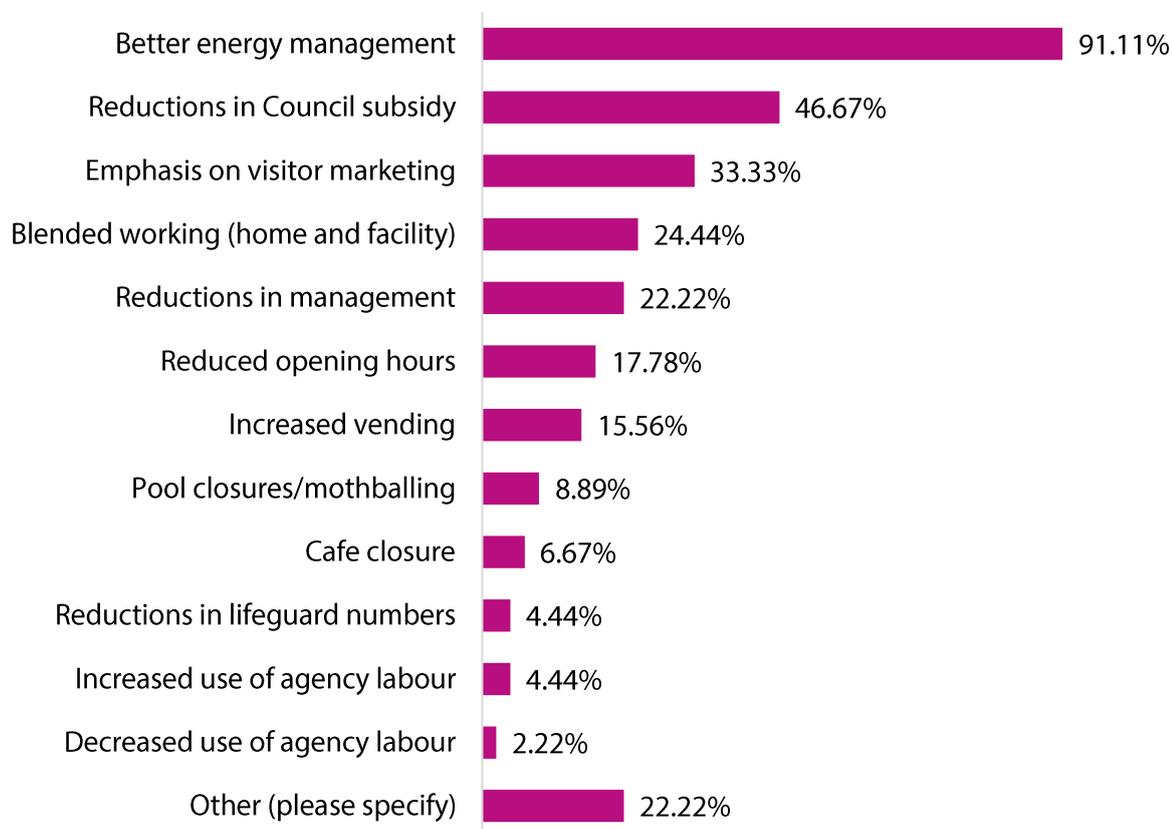
34.78% expect that funding from GP Commissioning will increase, 50.00% think it will stay the same, and 15.22% expect this to decrease.

16.00% of respondents expect the Central Government grant to increase, 28.00% expect it to stay the same, and 56.00% expect it to decrease.

8.93% expect their funding from direct council budget to increase, 35.71% expect this to stay the same and 55.36% expect their direct council budget to decrease.

4 Expected Changes

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

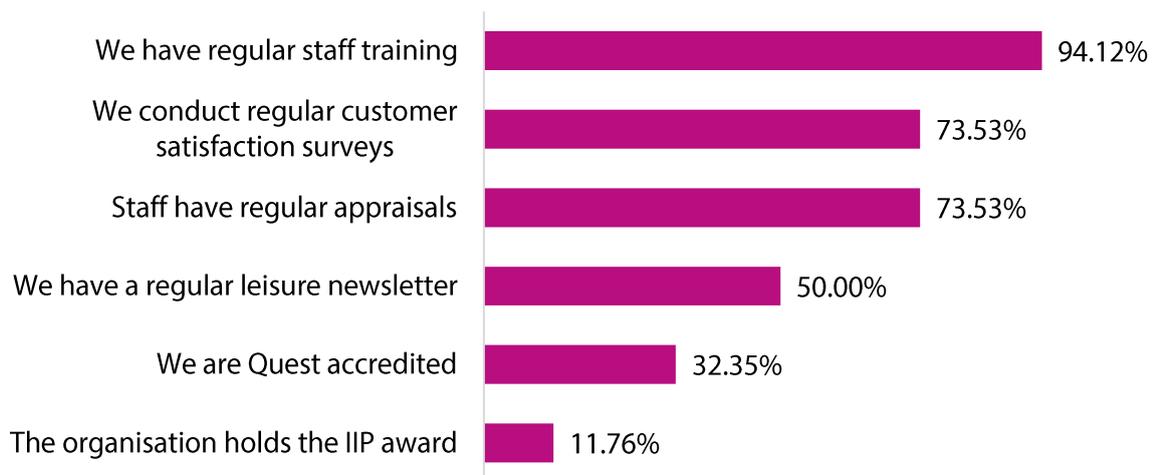


The majority of respondents expect better energy management (91.11%). Others also expect reductions in Council subsidy (46.67%), more emphasis on visitor marketing (33.33%), blended working (24.44%), reductions in management (22.22%), reduced opening hours (17.78%) and increased vending (15.56%).

Other changes expected from individual respondents include:

- More commercial activity around events and sponsorship
- Rationalising of working patterns to optimize service level
- Multi-skilled flexible working
- Tighter contract pressures
- Potential closure of facilities
- Membership app and tablets to improve sign-ups
- Devolving a smaller site to be run by the community

Staff Training and Quality - Please tick all that apply



On the question related to staff training and quality indicators held by responding councils, 94.12% have regular staff training, 73.53% conduct regular customer satisfaction surveys, 73.53% have regular staff appraisals, 50.00% have a regular leisure newsletter, 32.35% are Quest accredited and 11.76% hold an Investors in People award.

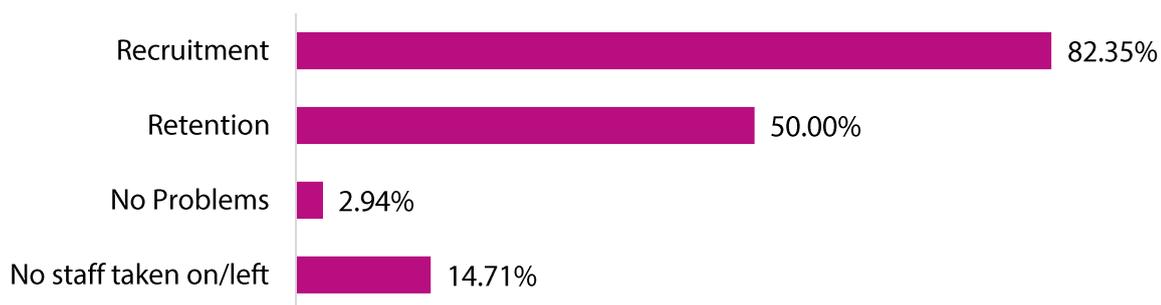
Where have you had difficulty recruiting or retaining staff (over the last 12 months)?

Lifeguards



85.29% of respondents have had difficulties with recruiting lifeguards in the past 12 months and 55.88% have had issues retaining lifeguards. 2.94% reported as having no problems with the above. 2.94% said no staff had been taken on or left.

Instructors



82.35% of respondents have had difficulties with recruiting instructors in the past 12 months and 50.00% have had problems with the retention of staff. 2.94% reported that they had no problems with either recruitment or retention, and 14.71% said that no staff had been taken on or left.

Technical / Managerial staff

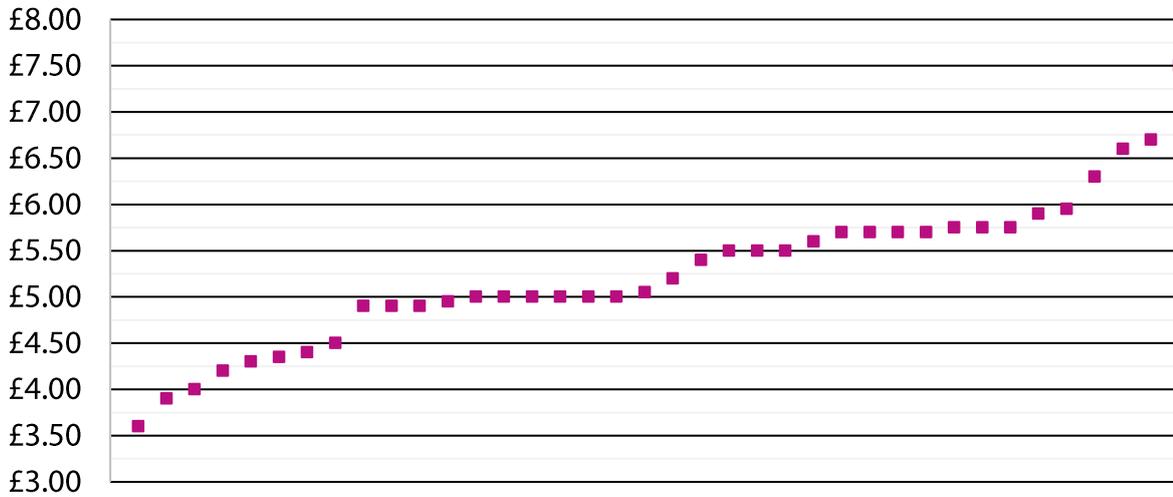


26.47% of respondents have had difficulties recruiting technical / managerial staff and 29.41% have had problems retaining them. 20.59% reported as having no problems with either of the above, and 26.47% of respondents said that no technical / managerial staff had been taken on or left.

6 Charges

What is the charge for a single adult swim?

Average price: £5.25

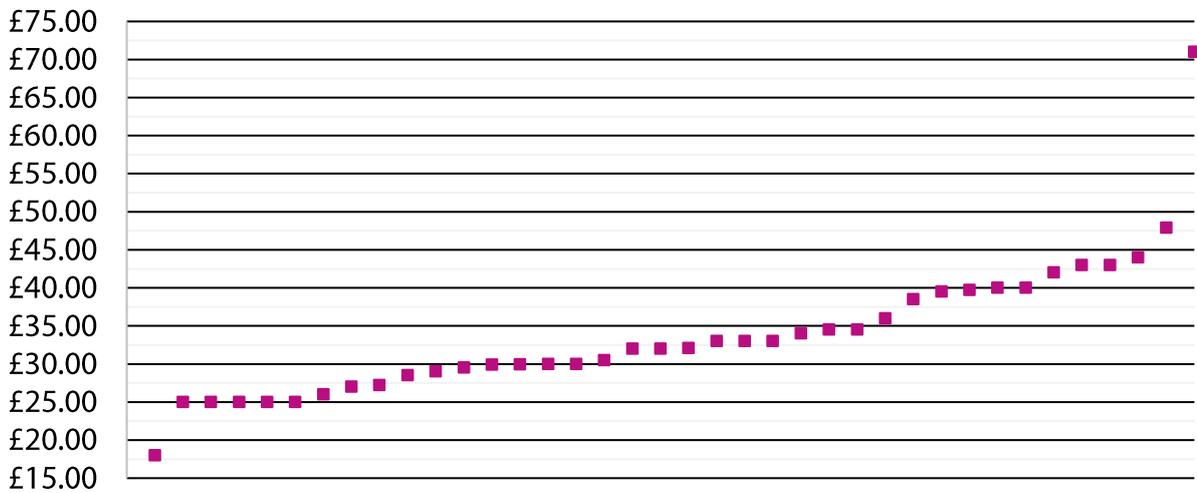


The charge for a single adult swim ranged from £3.60 to £7.50, with an average price of £5.25.

Typical monthly membership fee

Full membership

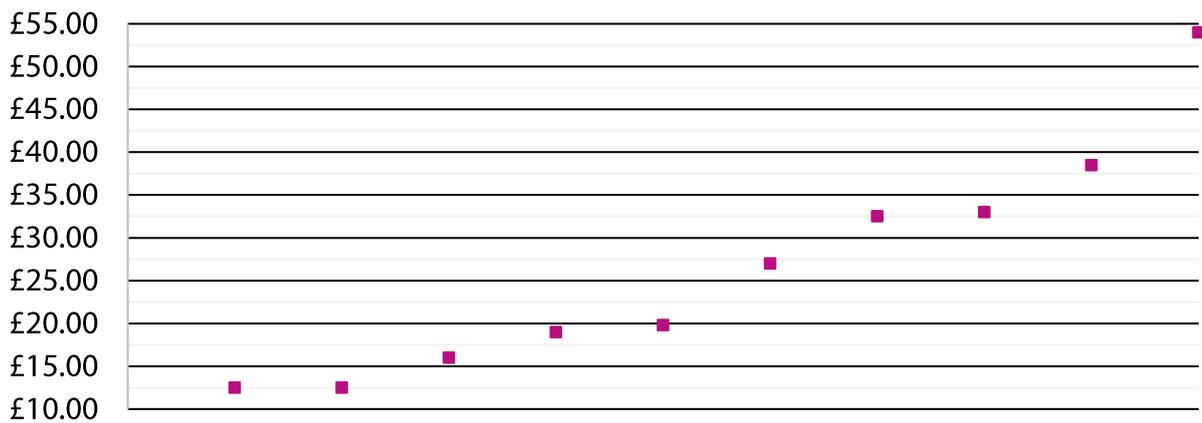
Average price: £33.77



The typical monthly full membership fee ranged from £18.00 to £71.00, with an average price of £33.77.

Off-peak membership

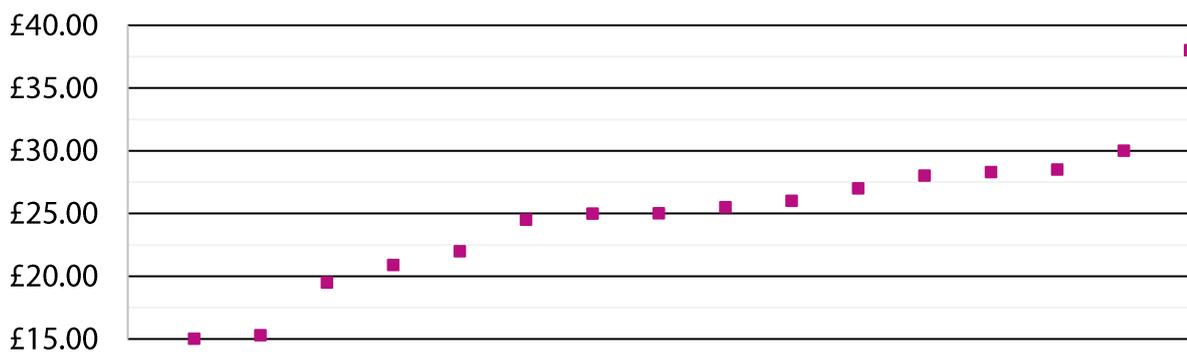
Average price: £26.48



The charge for off-peak membership was not offered by as many authorities, but for those that did offer one the charge ranged from £12.50 to £54.00, with an average price of £26.48.

Swim only

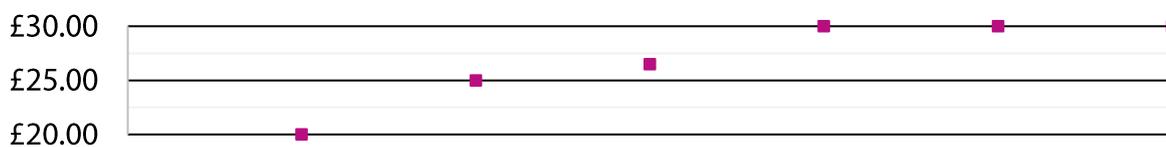
Average price: £24.91



Swim only membership charges ranged from £15.00 to £38.00, with an average price of £24.91.

Gym only

Average price: £26.92

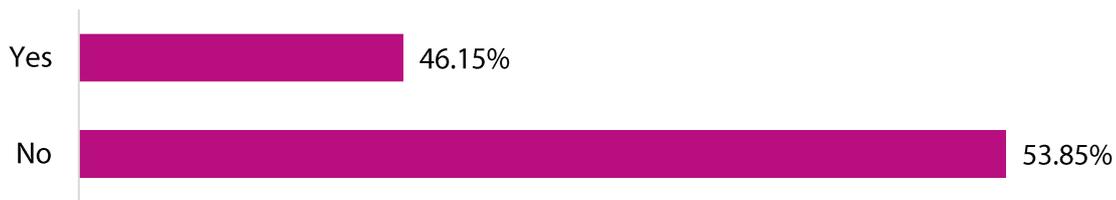


Gym only memberships ranged from £20.00 to £30.00, with an average price of £26.92.

Fitness classes

Only 2 members offered fitness class memberships, both for the price of £30.00.

Do you have a joining fee?



46.15% of respondents reported that they did have a joining fee for their leisure facilities. The charge for this was anywhere from £7.00 up to £25.00, with between £10 being the most common fee.

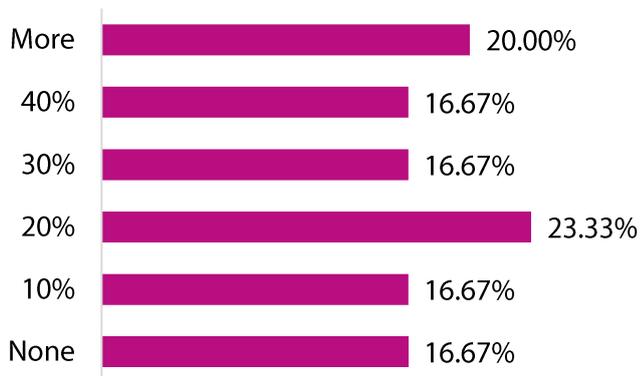
What membership payment types do you offer? (Tick all that apply)



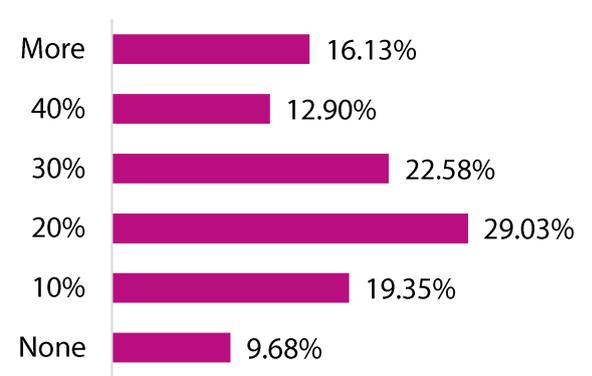
The majority of respondents offered 12 months prepay (79.49%), monthly contracts (64.10%) and monthly non-contracted (79.49%). Only 15.38% and 25.64% offered 3 and 6 month prepay option.

Membership package discounts offered

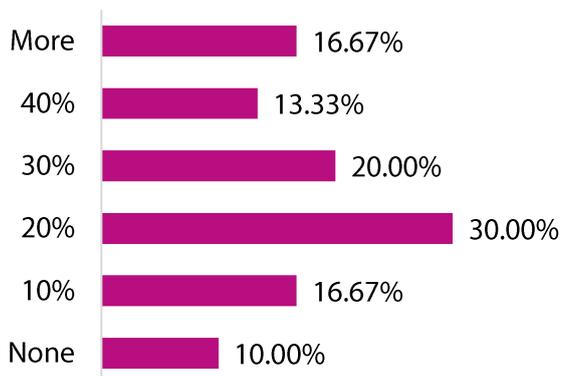
Low Income



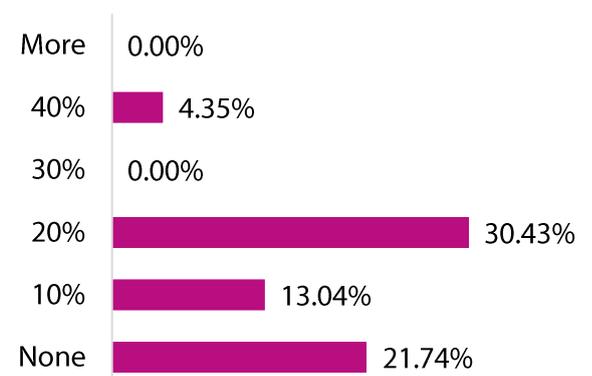
Over 65s



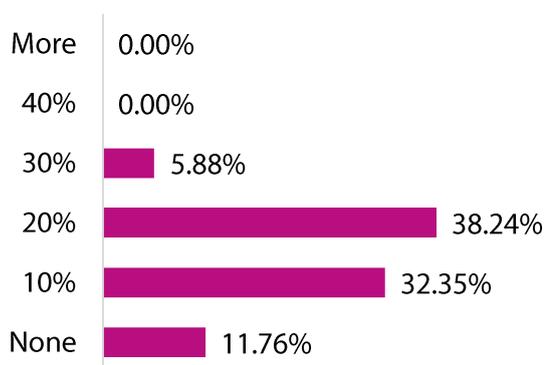
People with a disability



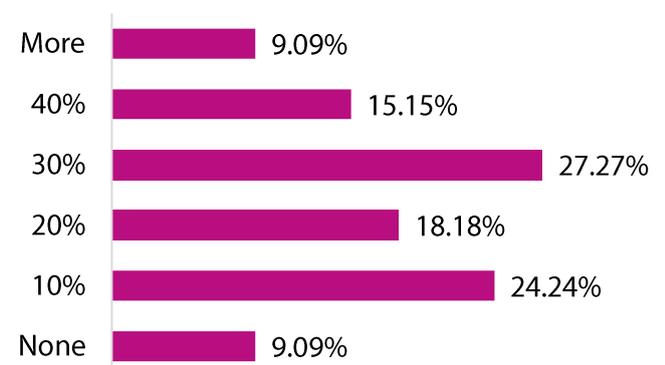
Couples



Corporate

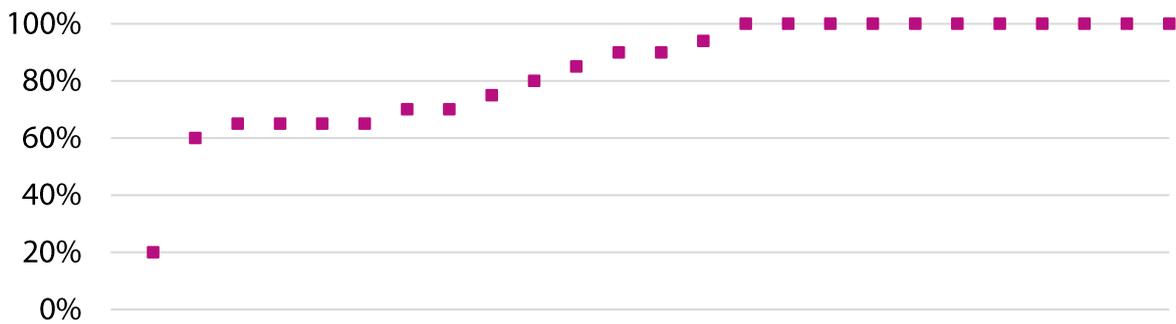


Students



Responding councils offer a variety of membership package discounts. The most popular percentage amount for each of the categories was around 20%.

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



The table above shows that responding councils generally have a much higher peak membership. Only one authority had a higher non-peak membership.

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 (58.82%).

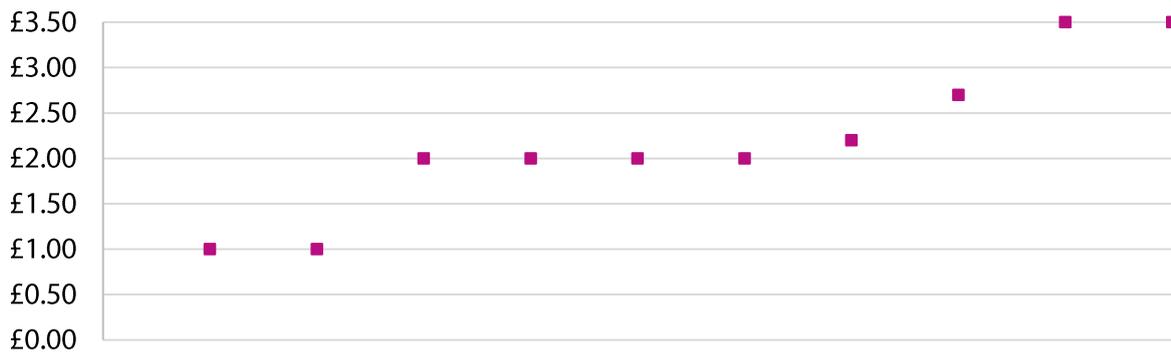
If you charge for parking, what does it cost?



Among the respondents that do charge for parking at leisure centres, the average cost for one hour was £1.41.

Two hours

Average: £2.19



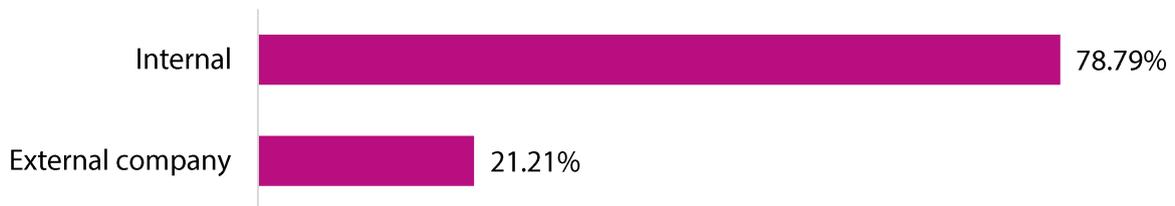
The average charge for parking for two hours was £2.19.

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



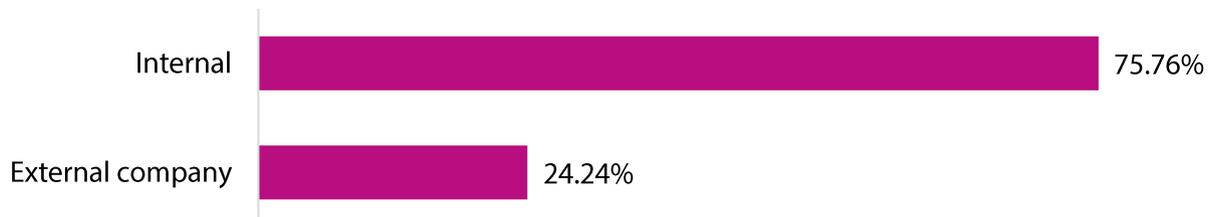
Roughly two thirds of respondents reported that they do refund a proportion of parking charges to leisure centre users (66.67%).

Who manages the direct debit administration?



78.79% of respondents use an external company to manage direct debit administration.

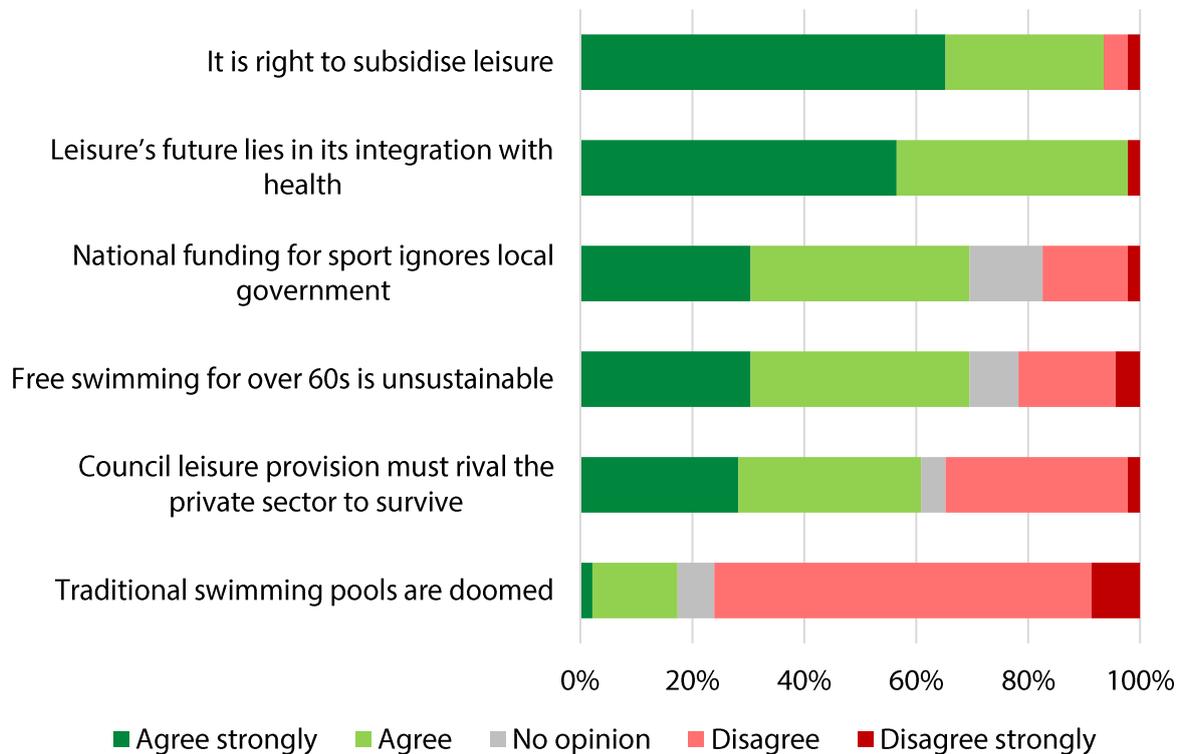
Who chases debtors?



75.76% of respondents use an external company to chase debtors.

7 Opinions

Please give your opinion on the following statements:



This finds that over 83.5% believe it is right to subsidise leisure with a further 97.5% agreeing that the future of leisure lies in better integration with health services.

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

- To be safe, leisure must not rely on subsidy.
- The free over 65s offer is more sustainable if offered through dedicated session times rather than applied to all sessions.
- We offer something fundamentally different to the private sector, it is a poor comparison.
- In-house leisure provision is comparable to the private sector and leisure trusts in relation to quality, customer service and experience.
- Working with health partners to invest in the measurement of social value and recognise this as part of the NHS outcomes framework is key to ensure delivery of ICS Prevention Strategies through better informed preventative commissioning.
- Swimming pools require significant government funding to ensure ageing assets can be replaced to continue to address our growing health inequalities in the community.

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:

- Gym memberships
- Community health and wellbeing – e.g. health referrals
- Working with primary and secondary care
- Swimming lessons
- Commercial activity – events/sponsorship
- Youth services
- Golf driving ranges
- Building packages and adding value
- Family entertainment and focused programs/projects
- Increased programme for outdoor pools
- Increase in marketing and programmes to attract usage
- Energy management programmes
- Improving participation in outdoor sports
- Improved digitization of services (website, customer app, remote access)
- Functional fitness
- Investment in facilities

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

Areas of future decreases identified by survey respondents included:

- Mothballing facilities
- Reduction in large investment programmes
- Swimming
- Less community work and encouraging / subsidizing priority groups
- Squash
- Bowls
- Weight management
- Unfunded supported services
- Cost of living crisis forcing users to cancel memberships
- Rising utility costs and maintenance pressures
- Smaller sites with less facilities
- Funded programme reductions
- Golf
- Falls prevention
- Café provision
- Reduced administration through improved digitisation

8 APSE Comment

Overall, Leisure is still struggling since Covid with average attendance levels for both gyms and swimming pools at around 92% of pre-covid levels. The cost of energy, especially for heating pools, has risen dramatically with over 60% reducing the pool temperatures in an attempt to reduce costs.

97% of leisure operators see the future of the sector integrated with health as a wellbeing service so the will is there if a way forward can be found to bring all the health agencies together. There is strong support for the continuation of subsidy in the sector amongst leisure professionals with 83.5% reporting their support for this approach; this perhaps reflects the renewed recognition of sports and leisure services as being part of the lexicon of local authority services that contribute to community health and well-being,

Recruitment and retention for pool attendants and instructors is still proving very difficult with over 80% of operators reporting a problem. Given the average remuneration of staff, it is unlikely to resolve soon whilst pay remains close to the minimum wage.

Members can catch up on the latest developments and innovation in local authority sports and leisure delivery via the free APSE Sports and Leisure Management advisory groups. Benchmarking is also available through APSE Performance Networks.

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Sign up for APSE membership to enjoy a whole range of benefits

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 are an excellent way to network 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:

- Building Cleaning and Facilities Management
- Education Catering
- Cemeteries and Crematoria
- Climate Change and Renewables Network
- Housing, Construction and Building Maintenance
- Commercialisation, Income and Trading Network
- Parks, Horticulture and Grounds Maintenance
- Highways and Street Lighting
- Sports and Leisure Management
- Fleet, Transport and Vehicle Maintenance
- Waste Management, Refuse Collection and Street Cleansing

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