



Association for Public Service Excellence

State of the Market: Sports and Leisure Management

Matt Ellis, APSE Principal Advisor



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Local Authority State of the Market 2025

Sports and Leisure Management



Briefing 25/XX
November 2025



Association for Public Service Excellence

Purpose:

- 🌱 Survey of UK local authority sports and leisure teams
- 🌱 Covering a diverse range of topics – from financial outlook to management models and facilities to membership pricing.
- 🌱 Provides a valuable snapshot of the sector
- 🌱 Comparative analysis - Identification of trends in the sector

**Aggregated figures – may not reflect the experiences of your council*



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Selected themes:

- 🌱 Strategic Outlook
- 🌱 Areas of Growth
- 🌱 Financial Outlook
- 🌱 Management Models
- 🌱 Facilities and Infrastructure
- 🌱 Workforce Pressures
- 🌱 Membership and Pricing
- 🌱 Sports Pitches and Outdoor Provision
- 🌱 Integration with Health



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Political context

Tracking Public Attitudes to Council Service Provision.

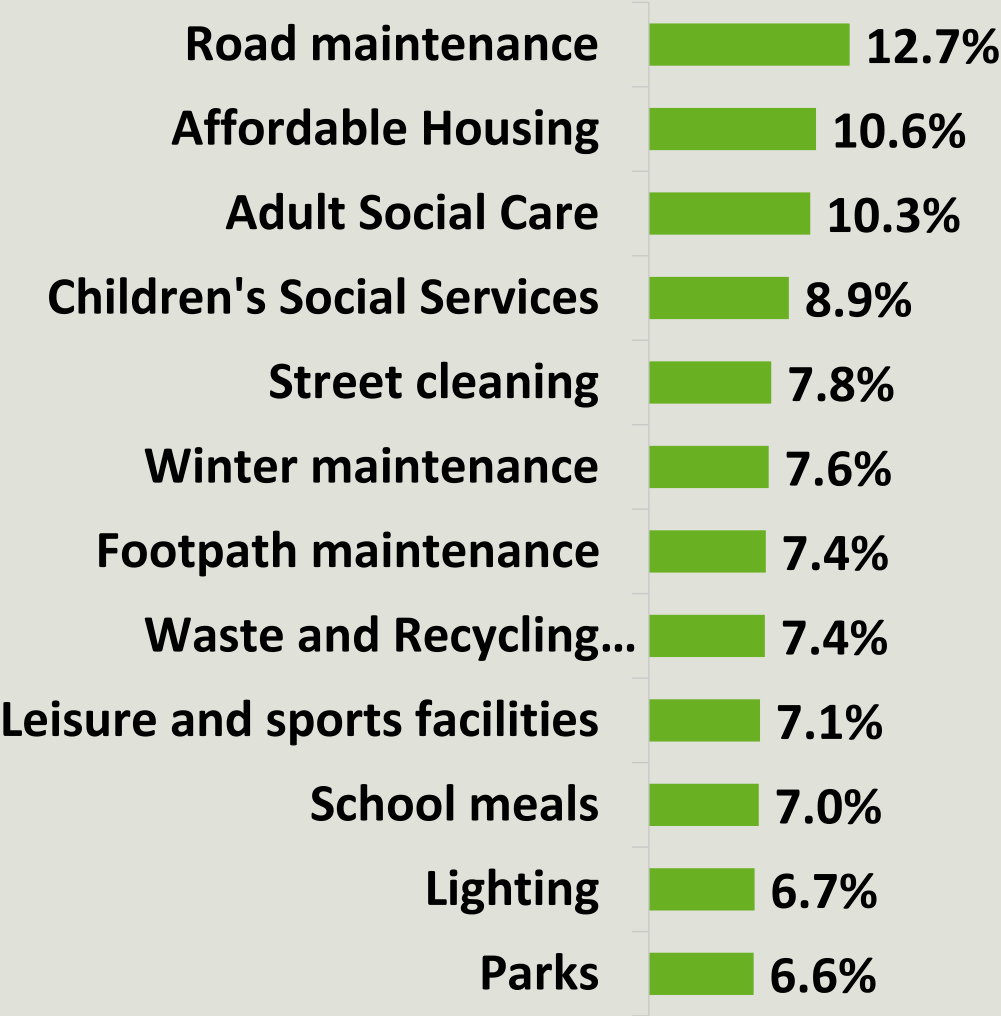
Tracking Councillors on the pressure to deliver.

Conducted by Survation on behalf of APSE

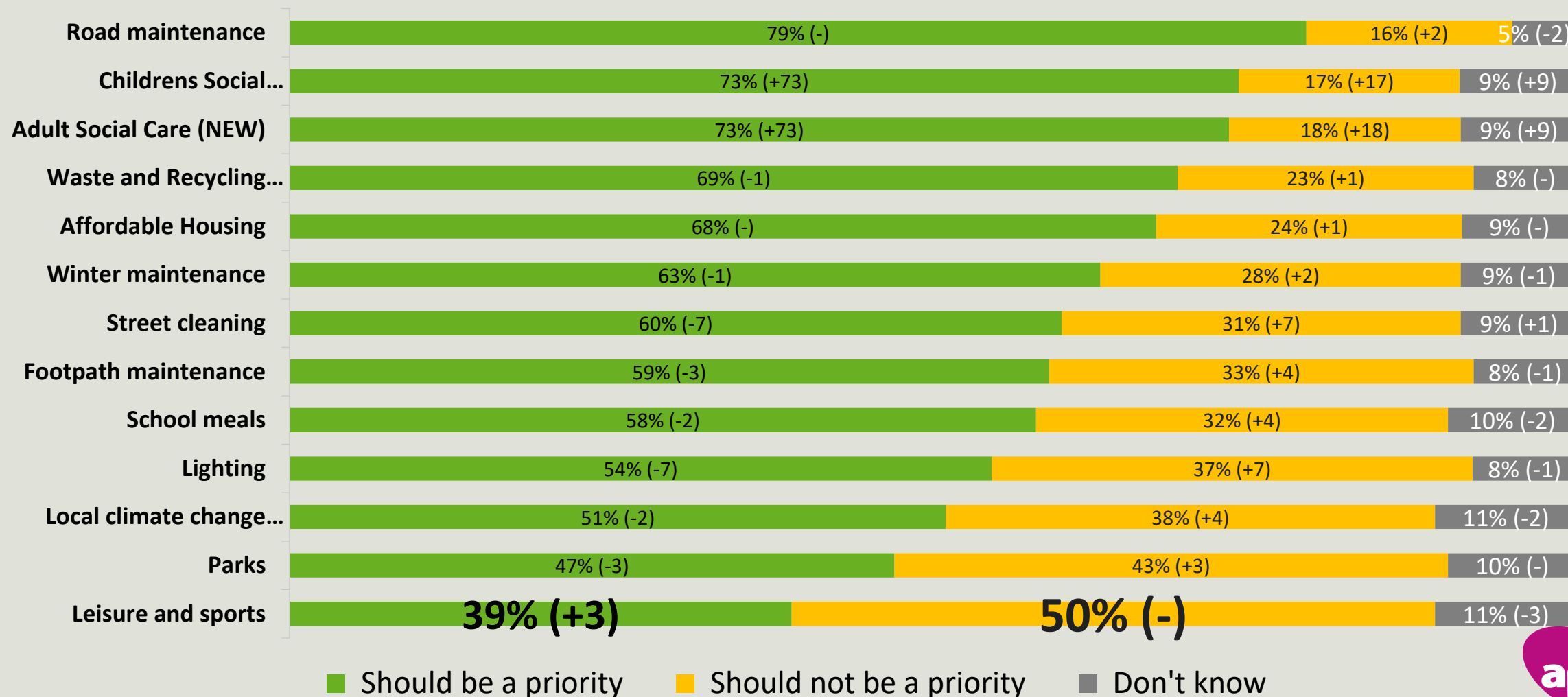


Survation.

You stated that you would like to see MORE money given to local councils than is done so currently. If you had the choice, what percentage of the extra money would be spent on each of the 12 services below?



If the local government was making cuts to public services, should the following be a priority to protect?





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Economic context

Young people are at risk of drowning because of the "terrifying" number of swimming pools that have closed in the last decade, a union says.

A study, conducted by the GMB union, indicates 500 public pools have closed since 2010, with almost half shutting since the pandemic. A coalition, including the Local Government Association (LGA), is now calling for renewed funding.

A report from the coalition, said 30% of children in Year 7 could not swim 25 metres confidently, which was up from 27% in 2017/18.

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Pool closures risk young people drowning - union



GETTY IMAGES

The GMB union said the closures of swimming pools across Great Britain was "terrifying"

26 August 2025



Theme of today's seminar

- 🌱 Conversations with the APSE network / Participation in Active Wellbeing Group.
- 🌱 Buy-in: Secure support from those who control the purse strings as well as residents.
- 🌱 *"Explore how councils can reimagine leisure provision to deliver more than facilities alone: building healthier, more active and resilient communities."*
- 🌱 Strategically aligning more closely with public health, mental health and social care objectives.
- 🌱 Survey: How well are sports and leisure services positioning themselves as a solution to these challenges?



Strategic outlook

97%

"Agree" or "Agree strongly"

2024 (+4%)

"leisure's
future lies in
integration
with health."

90%

"Agree" or "Agree strongly"

2024 (-6%)

"It is right
to subsidise
leisure"



Strategic outlook

	Agree / Agree Strongly	Agree / Agree Strongly	Agree / Agree Strongly
	2023	2024	2025
Free swimming for over 60s is unsustainable	69%	90%	81%
National funding for sport ignores local government	69%	76%	68%
It is right to subsidise leisure	93%	96%	90%
The era of traditional swimming pools is coming to an end	17%	31%	32%
Leisure's future lies in its integration with health	98%	93%	97%
Council leisure provision must rival the private sector to survive	61%	72%	69%



Areas of Growth

"Membership sales and new commercial income opportunities - diversification and creative business opportunities away from the traditional services offered."

"Health related targeted intervention."

"Through working with the NHS to lower the hospital admissions in later life."

"Continued growth of health and fitness offer and we keep pushing to commission services for health agencies."

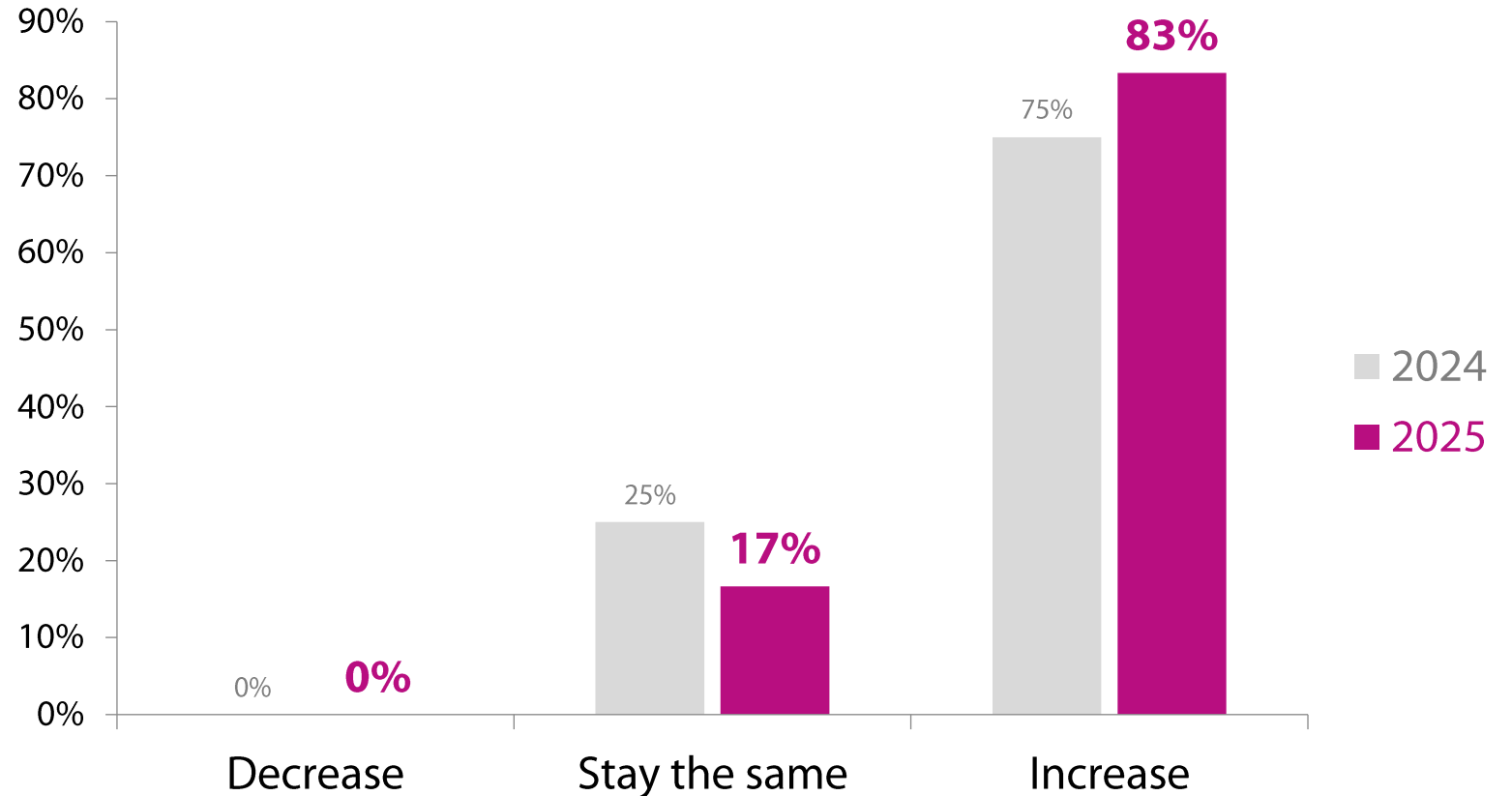
"Relocating some community health services to leisure centres - particularly those provided by physio's and specialist nurses. Integration and cross referrals are crucial if we are ever going to work together to prevent ill health in this country."

"Across junior activities e.g. gymnastics, football, under 5 fun play."



Financial Outlook

3.1 How will the demands on your leisure service change in the coming year?

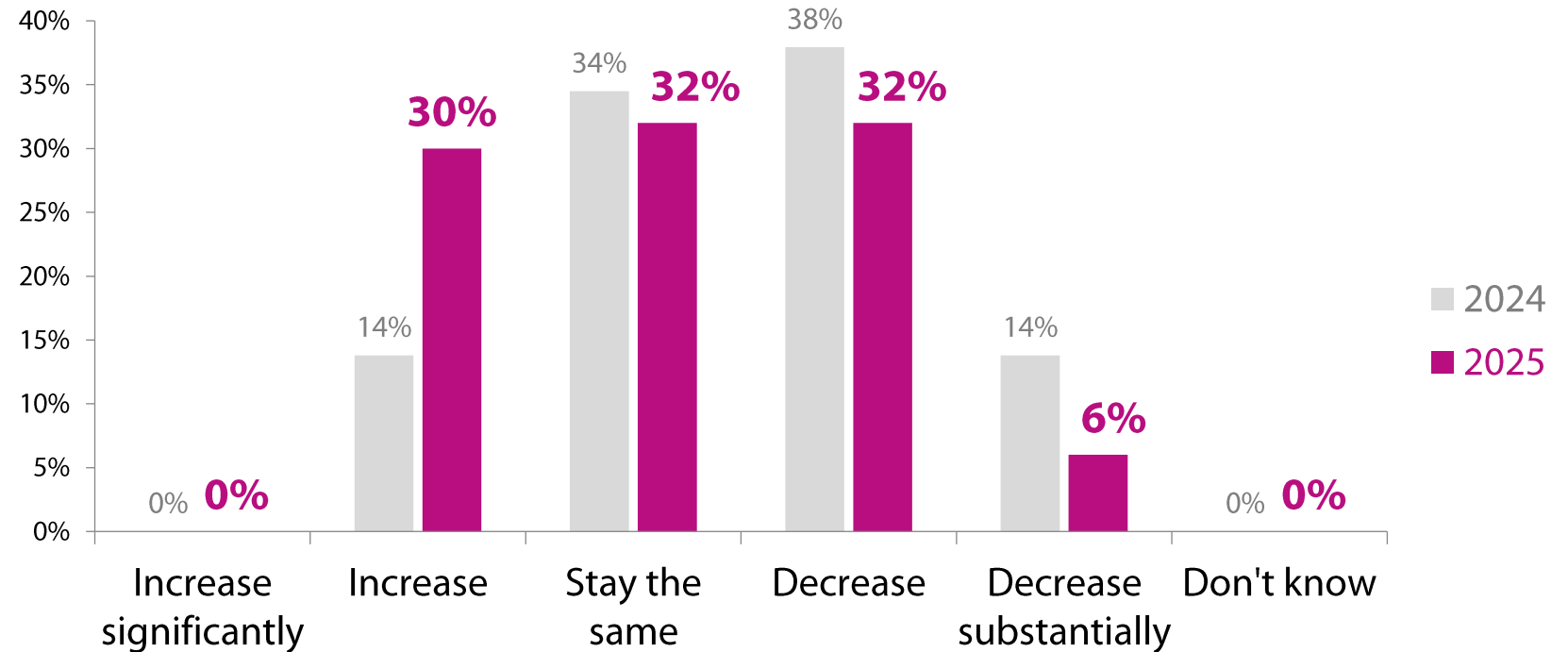




Financial Outlook

"The pressure on local authority budget is intense and as leisure is a non statutory service there have already been significant cuts and challenges with the future boding more of the same"

3.2 Overall, how do you expect the leisure budget to change in 2026/27?

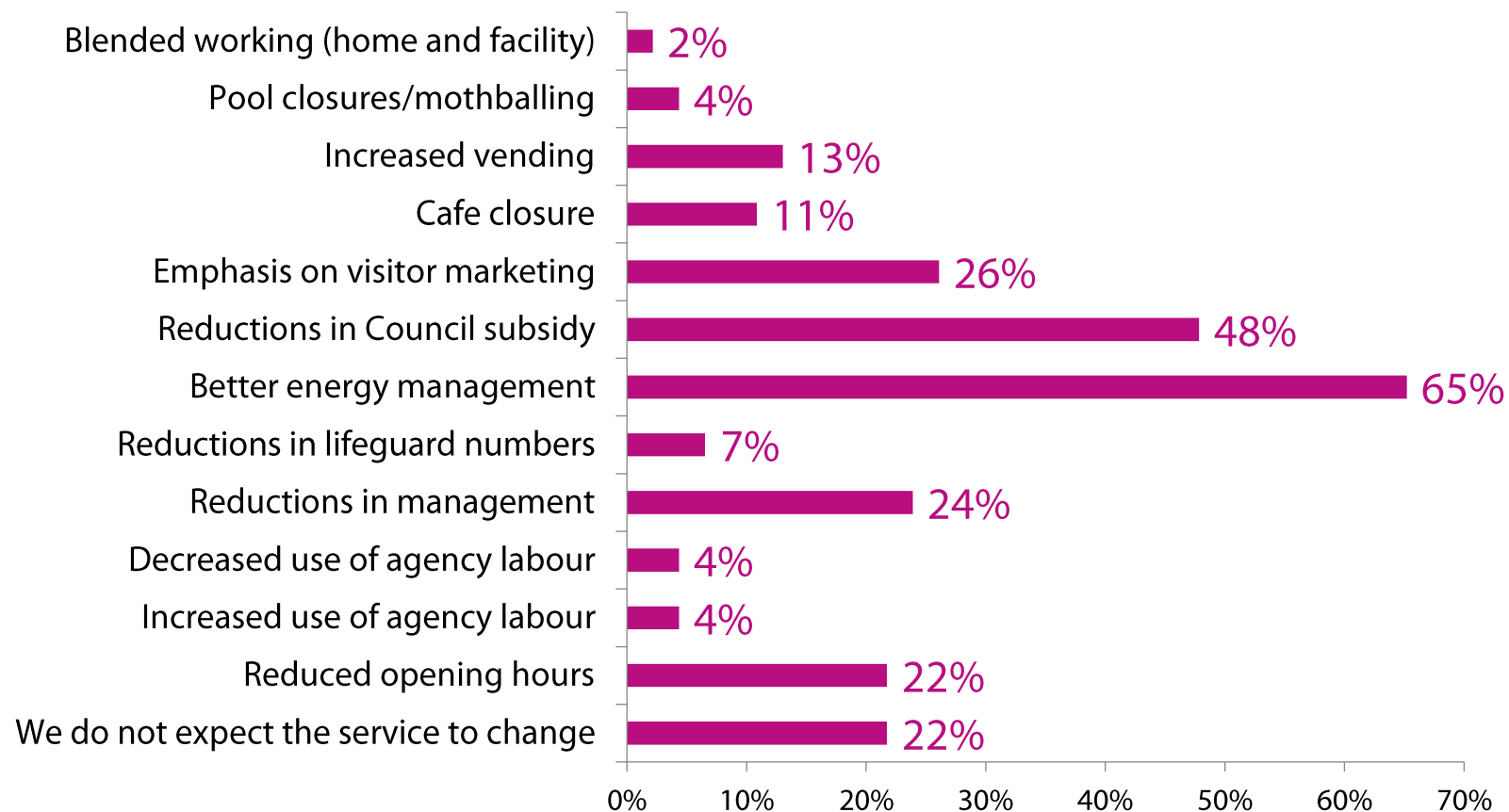




Financial Outlook

Increasing pressures on staffing will put a greater strain on the existing staff. The age of the buildings and condition is challenging as repairs and maintenance is a major problem and increasing cost due to 10 years of underfunding."

3.4 How do you expect the service to change due to pressures?





Management

62%

In-house

26%

Leisure trust

17%

Private Contractor

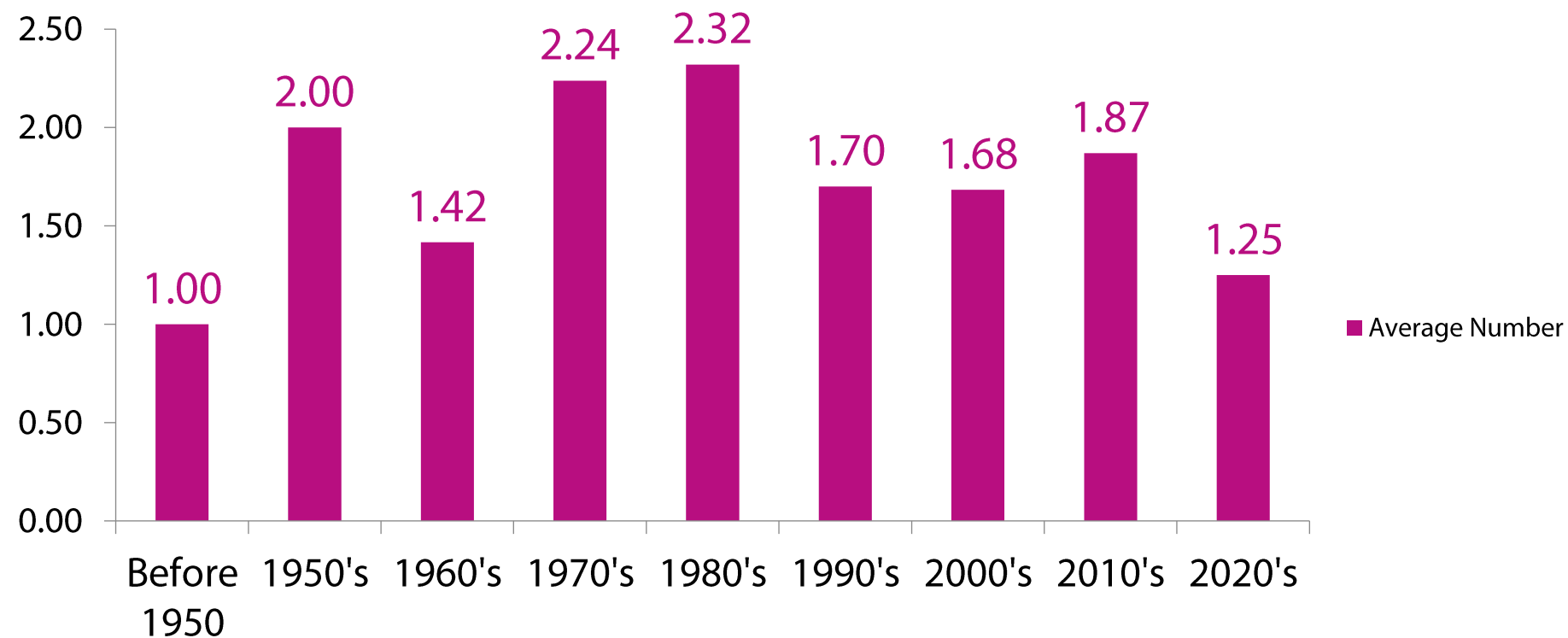
19%

Not for profit



Facilities and Infrastructure

5.1 When were your leisure facilities first built?(Please give the approximate numbers built in each decade)





Facilities and Infrastructure

Overall, how would you rate your average facility?

45%

Good condition

53%

***Requiring
refurbishment***

2%

***Uneconomical to
repair/beyond life***



Facilities and Infrastructure

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

-  Pool covers
-  Solar PV installation
-  Air Source Heat Pumps
-  LED Lights

24%

Reduced pool temperature

5%

Reduced opening hours

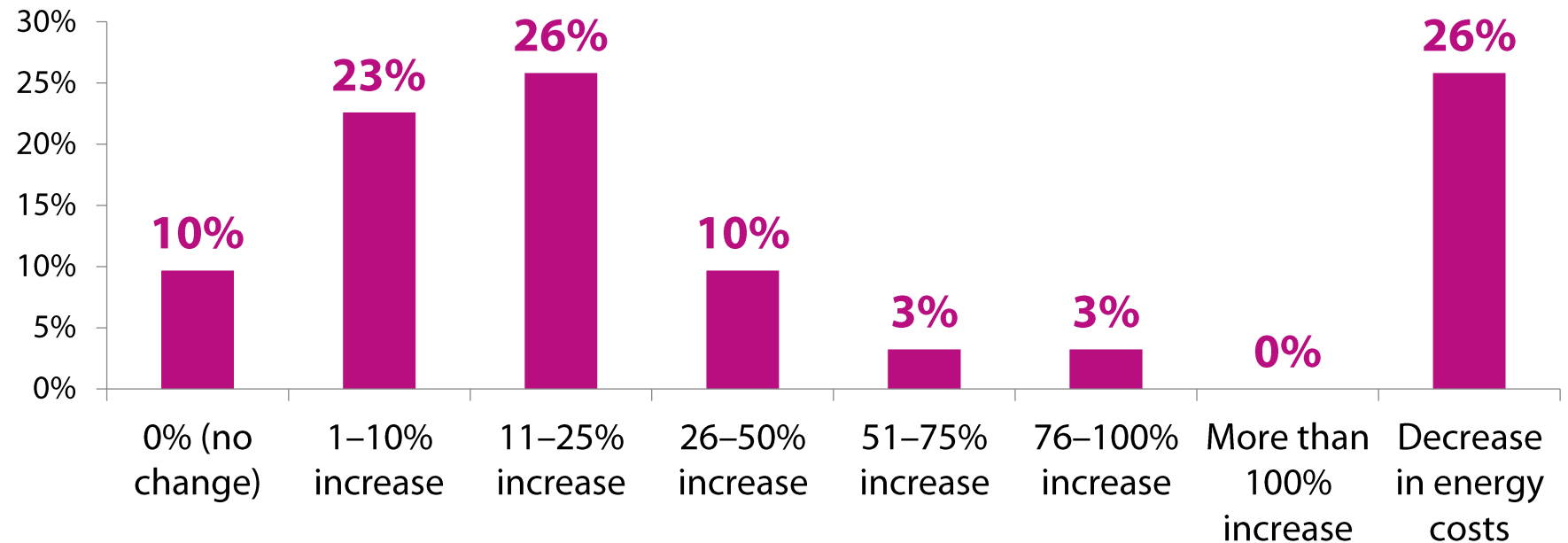
17%

None of the above



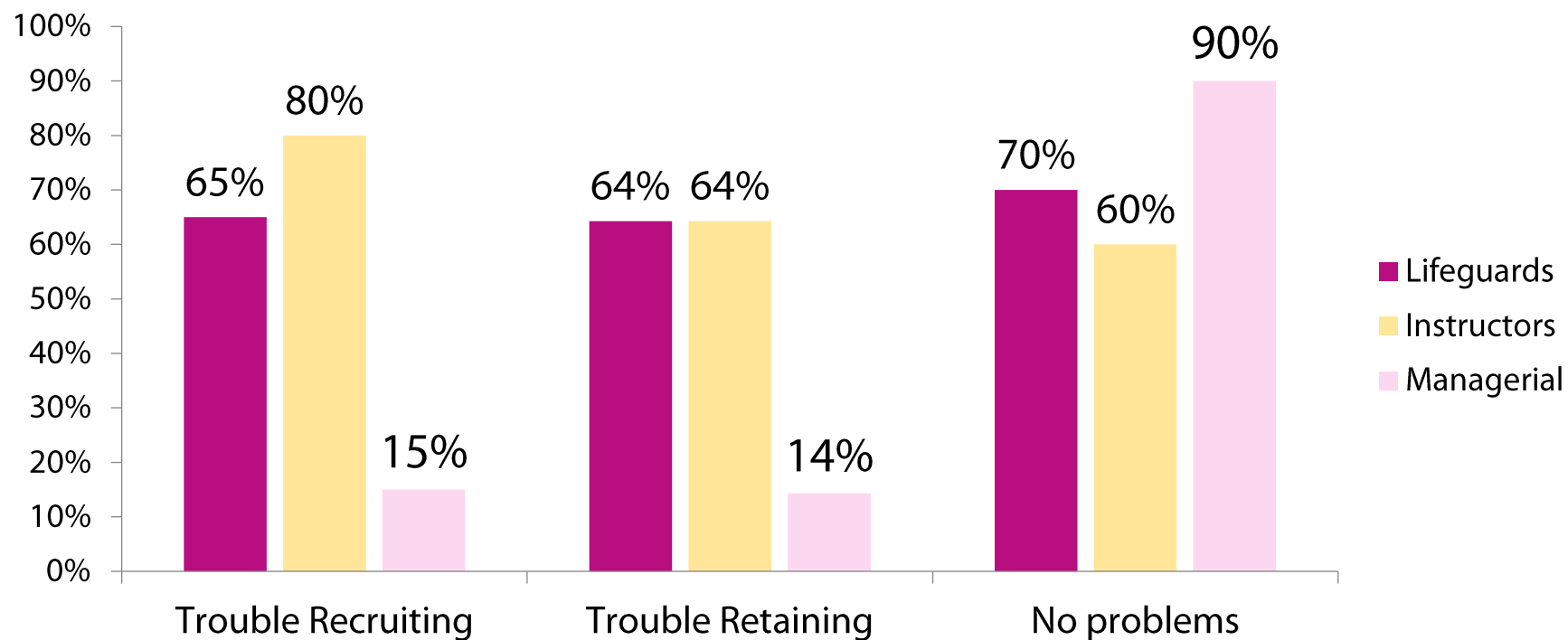
Facilities and Infrastructure

5.3 What has been the % change in energy cost over the last 12 months? (Estimated % increase)



Staffing

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





Staffing

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

	2023	2024	2025
Basic current hourly rate	£11.53	£12.48	£12.57



Membership

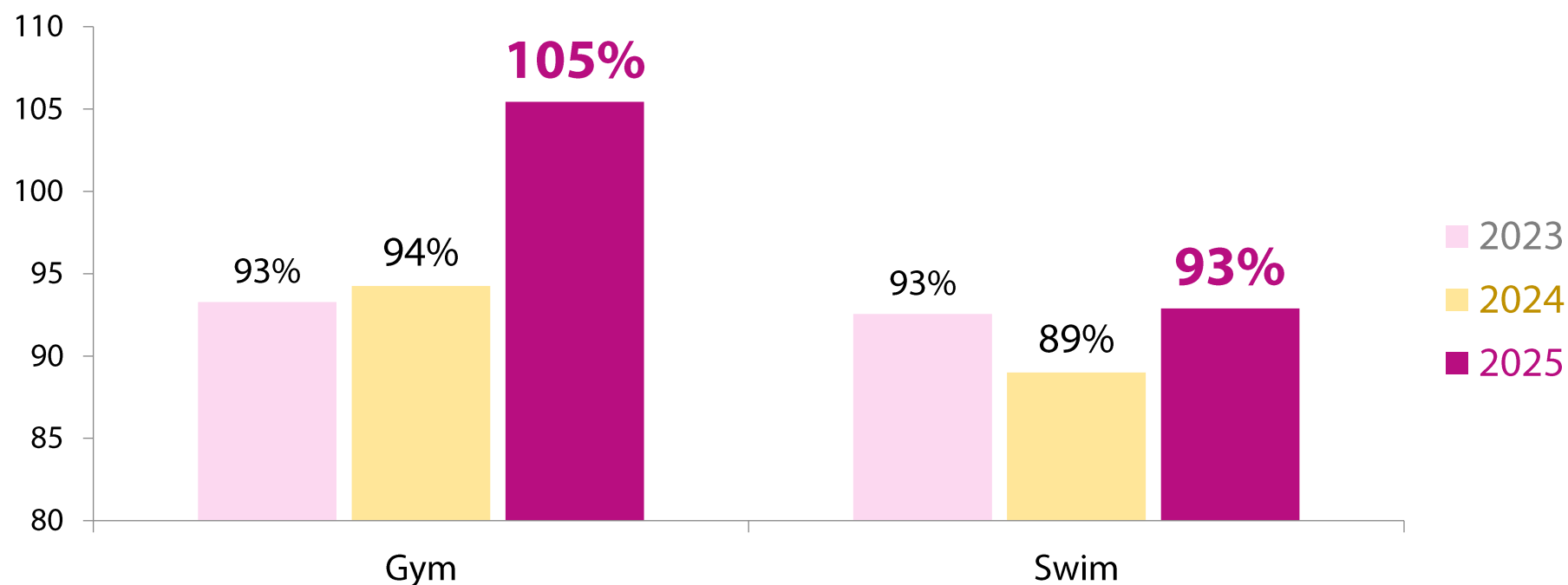
What is the charge (if applicable) for a single adult swim?

£6.20

***Single adult
swim***

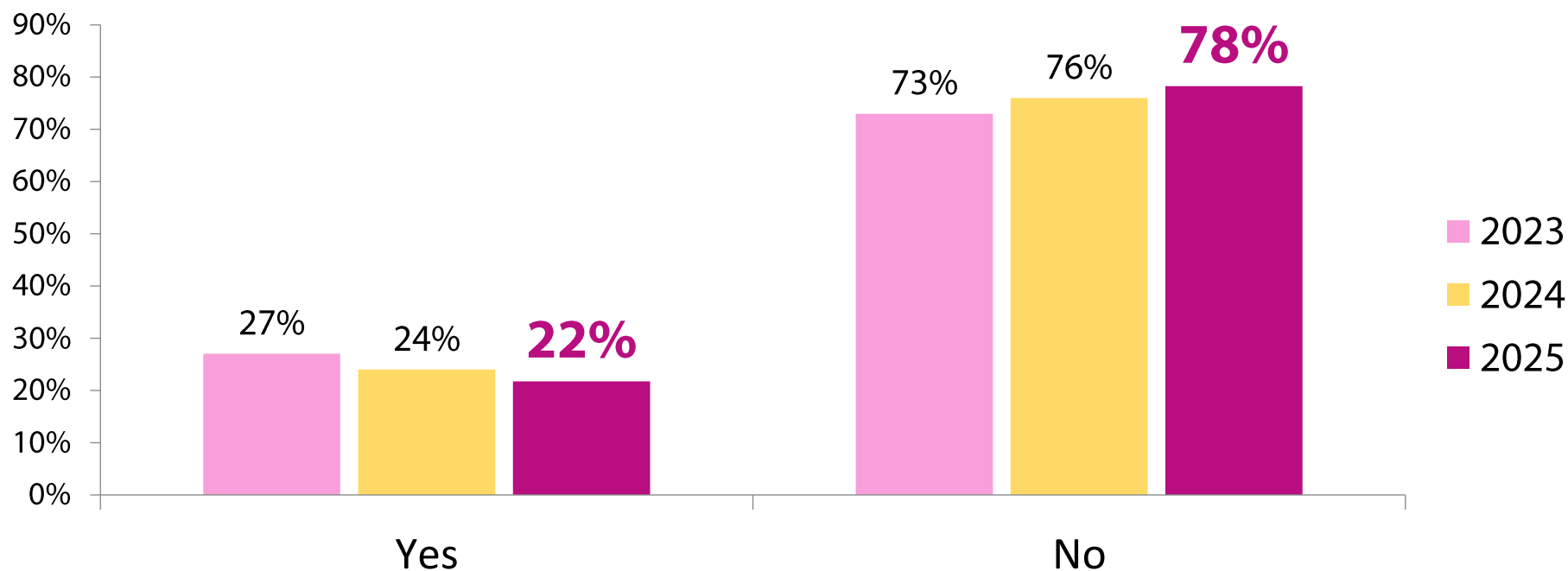
Membership

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



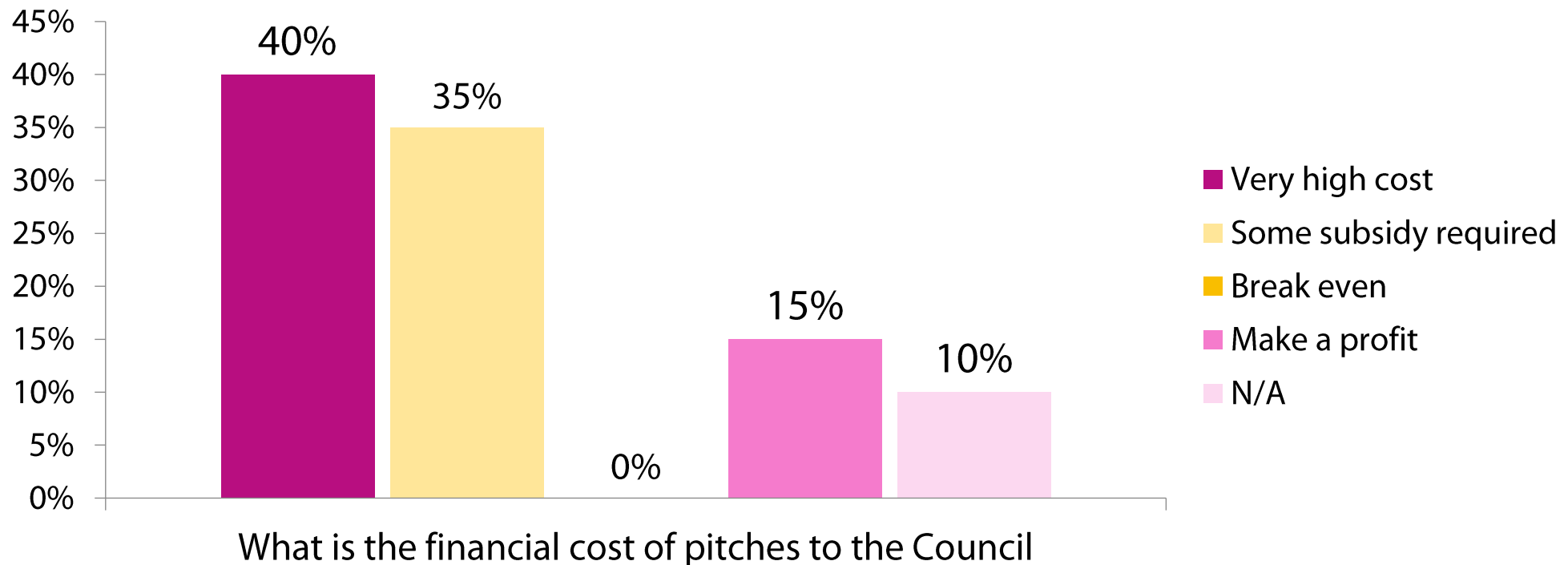
Sports pitches and outdoor provision

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



Sports pitches and outdoor provision

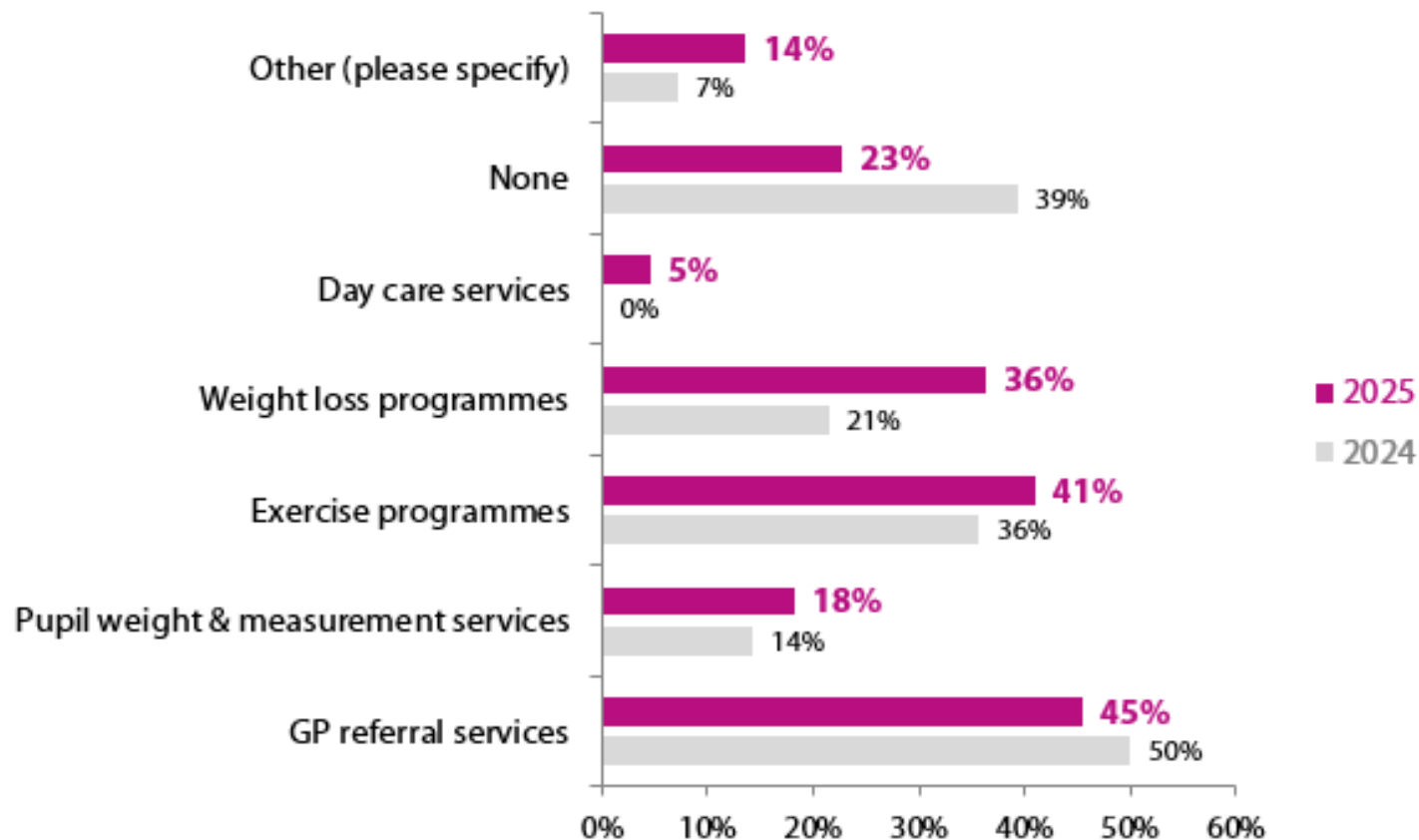
9.2 What is the financial cost of pitches to the council?





Integration with Health and Wellbeing

10.1 Have you been commissioned by your local Health Board (ICB or Health and Wellbeing Board etc) to provide any of the following:



Theme of today's seminar

-  ***"Explore how councils can reimagine leisure provision to deliver more than facilities alone: building healthier, more active and resilient communities."***
-  Survey: How well are sports and leisure services positioning themselves as a solution to crises in public health, mental health and social care.



3 points

1. Health integration is key for the future

Leisure is no longer a "nice-to-have" service but a core component of local public health infrastructure. With 97% of professionals agreeing its future lies in integration with health, the focus must be on embedding services within NHS and social care pathways and proving their value through robust outcomes data.





3 points

2. Infrastructure investment gap

A majority (55%) of facilities are either requiring refurbishment or are beyond economic repair. This poses a severe risk to service delivery and financial sustainability. Addressing this is a top priority to avert a widespread facility crisis.





3 points

3. Affordability tightrope

Services are increasing prices (e.g., a 27% rise in swim costs since 2023) to cover rising costs, while simultaneously offering concession schemes to protect access for vulnerable groups. Balancing commercial pressure with social value remains one of the big operational challenge for leisure management.



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