



membership resources

State of the Market Survey 2009

Report

Local Authority Leisure Services



Briefing 09/19
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The state of the market survey was conducted by Rob Bailey, APSE Principal Advisor for Sports and Leisure

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Local Authority Leisure Services

State of the Market 2008

APSE conducted an on-line survey during February and March 2009, sent out to over 900 local authority contacts in leisure services across the UK.

A series of structured questions were asked covering attitudes to those issues currently facing leisure services and the expected challenges for future service provision.

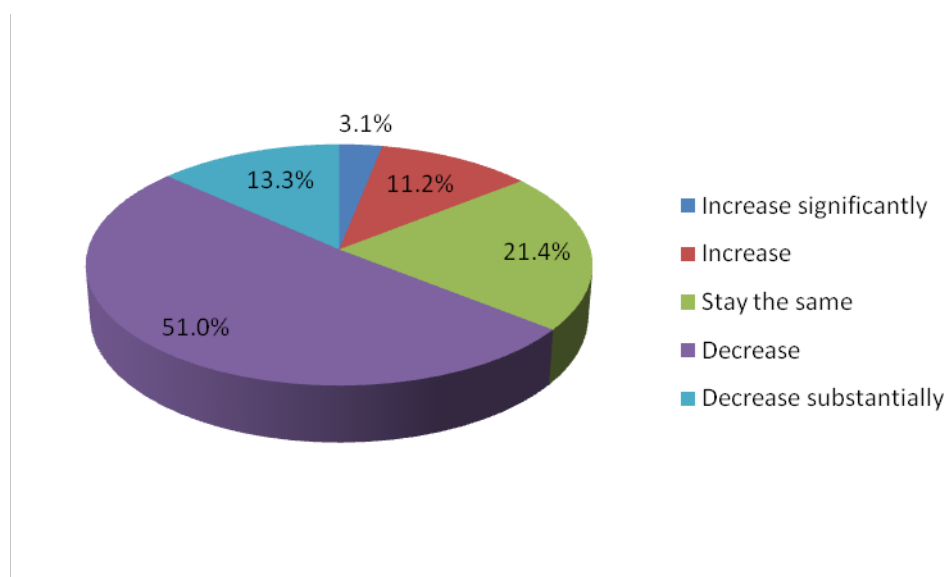
The survey uncovered an expectation of a substantial period of change for leisure provision

- Local Authority funding streams are expected to decline, with growth taken up as leisure becomes an integral part of health provision.
- Some authorities are examining delivery options for leisure provision in the coming year although none expect to outsource to the private sector.
- Long term declines in racquet sports are predicted with shorter term reductions in gym membership reflecting economic worries.
- 95% of leisure managers thought it right to subsidise leisure although value for money concerns remain for some facilities including outdoor sports pitches

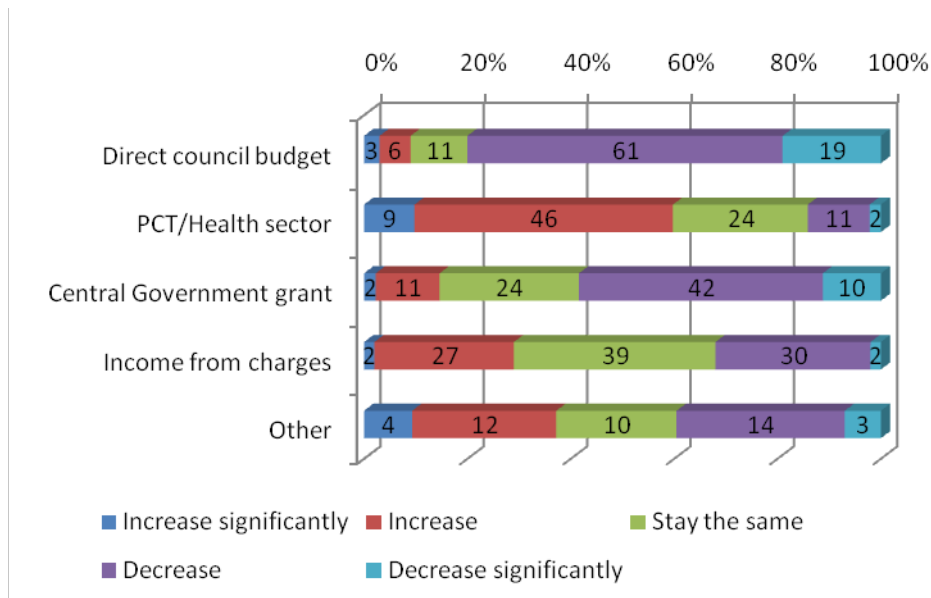
Results

Funding expectations for the next 12 months

95% of respondents expected the workload of the leisure section to increase over the next year although the majority 64.3% expected the overall leisure budget to decrease of which 13.3% forecast a substantial reduction.



There is a marked expectation that the composition of leisure funding will change substantially over the next year. A total of 80% forecast a reduction in the budget provided by the host authority with 59.7% seeing an increase in funds from their PCT and the health sector. Funding from central government, despite current free swimming initiatives, was thought to decrease by 58% with only 14% anticipating an increase.



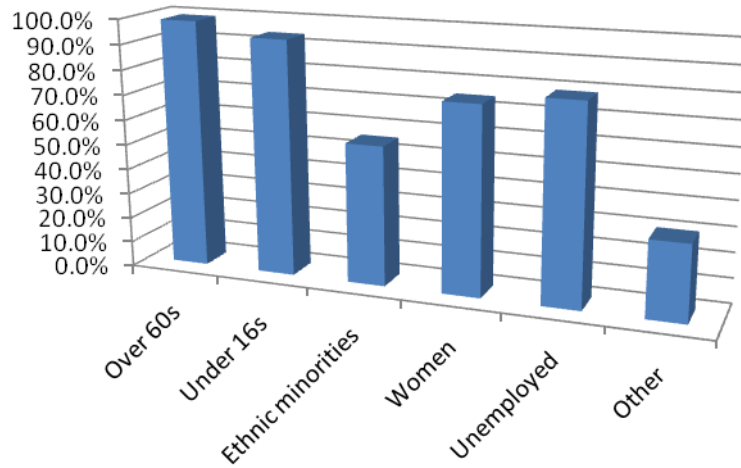
Opinion on income from charges was evenly spread amongst those seeing an increase, a decrease and those who thought it would remain about the same. A small number (16%) expected to receive funding through S106 contributions and Sport England however 17% saw other sources drying up.

Parking has been used by some councils as a revenue stream and 22.6% of authorities currently charge to park at least one of their leisure centres. Charges vary widely from between 20p per hour to £1 or more. 50% of those centres where parking is charged recognise the fact within the centre admission fee and refund a proportion of the parking fee.

Participation

Much has been placed in recent years on attracting a wider range of users to participate in leisure, a trend which is likely to receive greater emphasis if health funding becomes more dominant.

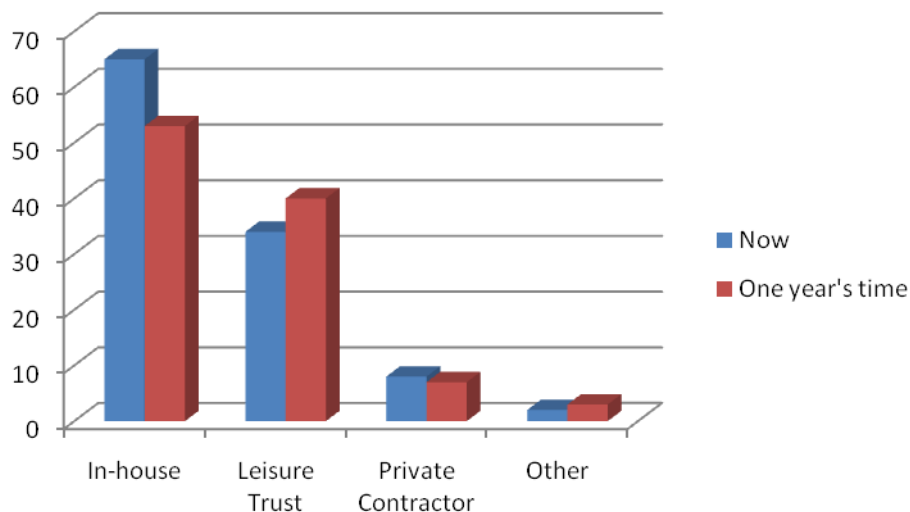
The survey asked whether there was active encouragement of participation from particular groups.



Perhaps as a direct result of the free swimming initiatives, 99% actively encouraged the over 60s and 94% the under 16s. A lesser number (55.6%) targeted ethnic minorities and around 3 in 4 specifically targeted women (74.7%) and the unemployed (78.8%).

Organisation

The survey asked who currently manages leisure services and the expectation of who would manage them in 12 months time.

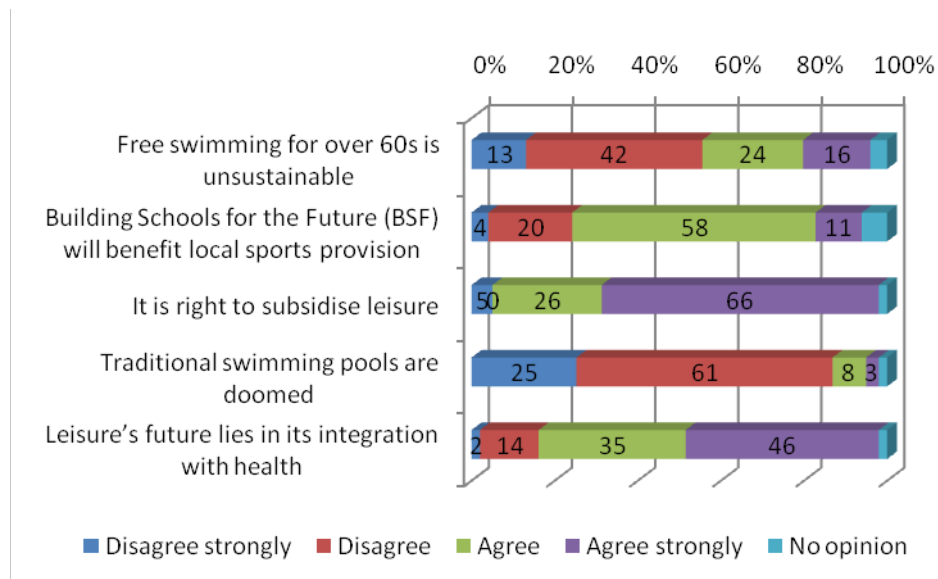


65 respondents were currently part of an in-house team, but only 53 expected to still be in-house in 12 months time. 34 were currently part of a trust and 7 expected to be joining a trust within the year. Of the 8 employing a private contractor the figures remain static with 1 authority looking to bring the service back in-house. In several there is a mixed

economy in leisure with community groups, BSF schools and PFI build completing the leisure offering.

Views on Leisure

To test the views of leisure managers, a series of statements were tested to gauge the strength of opinion.



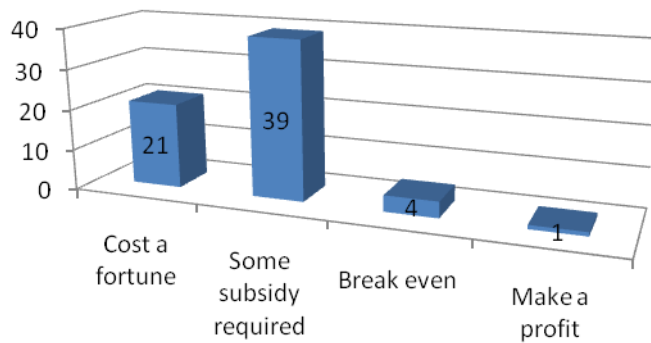
Of those who expressed an opinion, the majority 58% disagreed or disagreed strongly that over 60s swimming was unsustainable. Interestingly 88% also disagreed that 'traditional swimming pools are doomed' although anecdotal evidence elsewhere in the survey suggest that there is a fall off in casual swimming.

83.5% agree that the future of leisure lies in its integration with health and 75% saw the Building Schools for the Future programme as benefiting local sports provision. Unsurprisingly given the sample, 95% agreed that it was right to subsidise leisure.

Sports Pitches

Sports pitches have had mixed fortunes over the last few years with some Council's, viewing them as potential building land assets. The respondents were collectively responsible for over 2,600 sports pitches with 39% having established new ones over the last 2 years.

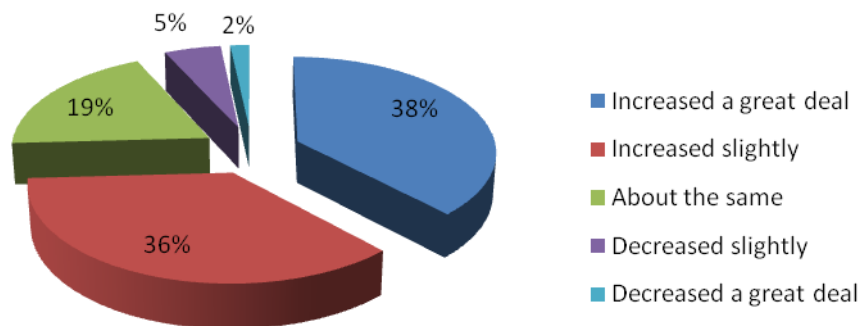
What is financial cost of pitches to the Council



Only one authority realised a profit from their pitches and 44.8% said that some subsidy was required. A further 24% said they 'cost a fortune' possibly reflecting a more underlying concern over whether they were sustainable in the longer term.

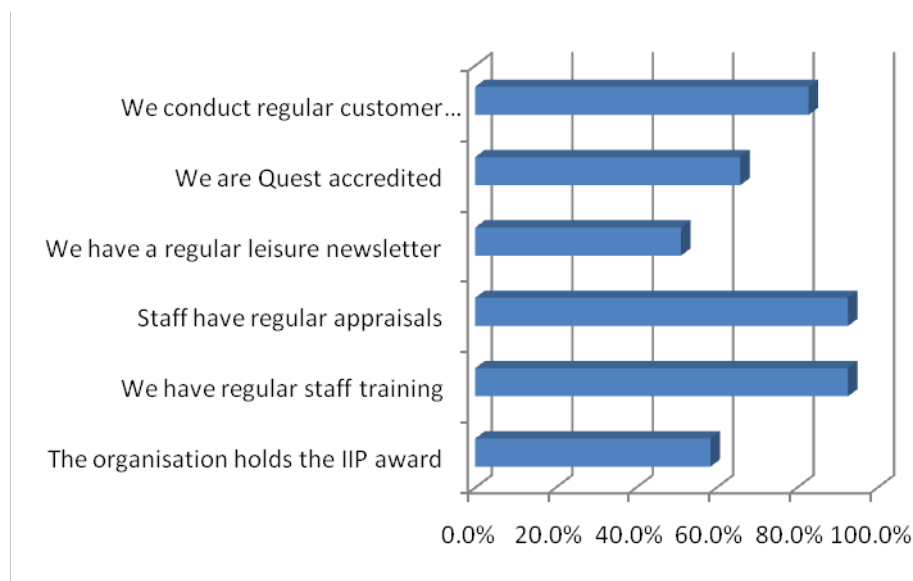
Staff and Job Evaluation

65.9% of leisure organisations had completed job evaluation, 27% had not and it did not apply to a small number 7%. Of those who had implemented the results, the majority (74%) had seen an increase in wage costs of whom 38% saw the increase as substantial.



The average hourly wage for leisure attendants was measured at £7.59 per hour with a median cost of £7.45 per hour. These figures may be subject to a rise from April 1st.

Views on staff absence are varied with 14.6% regarding absence as too high, 25.6% as slightly above average and 31.7% as about average. Most organisations appear proactive in staff training and quality



93% conduct regular staff training and appraisals and 83% regularly conduct customer satisfaction surveys. 66% are quest accredited and 59% hold the IIP award.

Future changes

Reflecting the anticipated changes in funding, most respondents listed health matters as the area that would drive leisure growth in the future. The drivers included tackling obesity, encouraging the elderly, the young, the over 50s, family participation and stimulating participation through club membership.

Views on those areas where work might decrease were more pessimistic. Many saw casual participation in dry sports as declining (mainly racquet sports including badminton, squash). Casual swimming was mentioned by several as being in long term decline although government initiatives may stimulate that sector in the medium term.

Gym membership was expected to reduce as a direct consequence of the economic downturn but is only expected to be a temporary setback. Those youth activities related to Sports development were similarly likely to reduce as funding streams are not renewed. Surprisingly adult team sports including adult football on outdoor pitches was mentioned by some as being in decline.

APSE will continue to monitor the changes within leisure and seek to obtain further detail on those areas where concern has been expressed. The survey will be repeated in early 2010.

APSE

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:-

- Efficiencies, procurement and service transformation
- Building cleaning
- Citizen engagement
- Local authority, police and fire authority partnerships
- Community safety and security
- Housing management, construction and building maintenance
- Parks, horticultural and ground maintenance
- Roads, highways and street lighting
- Social care
- Leisure management and community venues
- Vehicle maintenance and transport operations
- Waste management, refuse collection and street cleansing
- Workforce strategy and employee relations