

State of the Market Survey 2021

Local Authority Sports and Leisure Services



January 2021
21-04

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

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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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We invest in people Gold



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- Do you actively encourage participation from particular groups within the community?
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Results at a glance

Workload

| | |
|--|---------------|
| Percentage expecting the workload of the leisure section to increase over the next 12 months | 75.86% |
|--|---------------|

Staffing

| | |
|--|--------------|
| Average basic current hourly rate for leisure staff (before tax) | £9.89 |
|--|--------------|

| | |
|--|---------------|
| % of respondents who say staff absence levels are 'slightly above average' or 'too high' | 21.88% |
|--|---------------|

| | |
|--|---------------|
| % of respondents with difficulty recruiting lifeguards | 41.94% |
|--|---------------|

| | |
|---|---------------|
| % of respondents with difficulty recruiting instructors | 36.67% |
|---|---------------|

| | |
|--|--------------|
| % of respondents with difficulty recruiting technical / managerial staff | 0.00% |
|--|--------------|

Finance and charges

| | |
|---|---------------|
| % expecting the leisure budget to either decrease or decrease substantially | 44.90% |
|---|---------------|

| | |
|--|--------------|
| Average charge for a single adult swim | £4.82 |
|--|--------------|

| | |
|---|---------------|
| Average typical monthly full membership fee | £33.71 |
|---|---------------|

| | |
|--|---------------|
| % of respondents with a joining fee for facilities | 33.33% |
|--|---------------|

| | |
|--|---------------|
| % of respondents who charge for parking at any of their leisure facilities | 21.88% |
|--|---------------|

Service delivery

| | |
|---|---------------|
| % of respondents who have established any new pitches over the last 2 years | 30.77% |
|---|---------------|

| | |
|---|---------------|
| % of respondents who answered 'some subsidy required' in the financial cost of pitches to the Council | 56.41% |
|---|---------------|

Expected changes over the next year

| | |
|--|---------------|
| % of respondents expecting reductions in Council subsidy | 29.55% |
|--|---------------|

| | |
|---|---------------|
| % of respondents expecting reductions in management | 38.64% |
|---|---------------|

| | |
|--|---------------|
| % of respondents expecting reduced opening hours | 47.73% |
|--|---------------|

Sports and Leisure

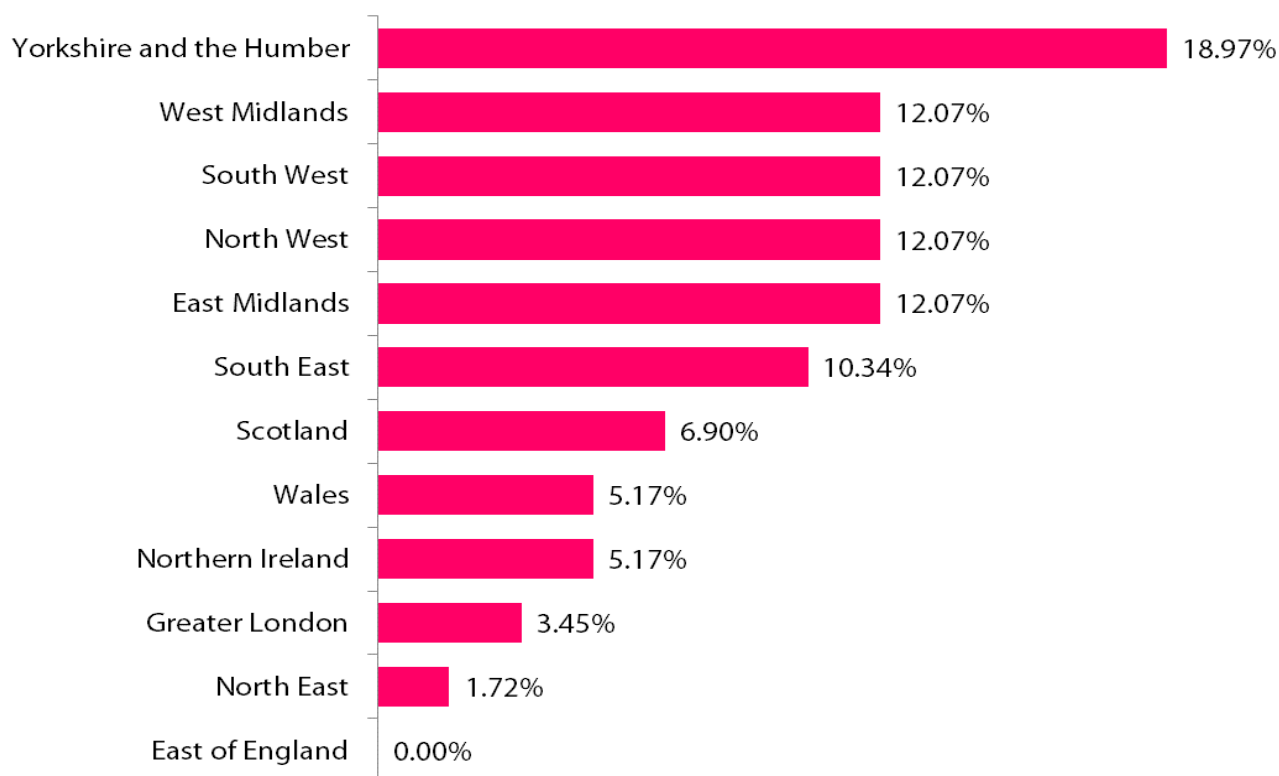
State of the Market 2020

APSE conducted an online survey between November and December 2020. 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. 2020 has been dominated by the global Covid-19 pandemic which has required the closure or allowed only limited opening of gyms and pools.

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

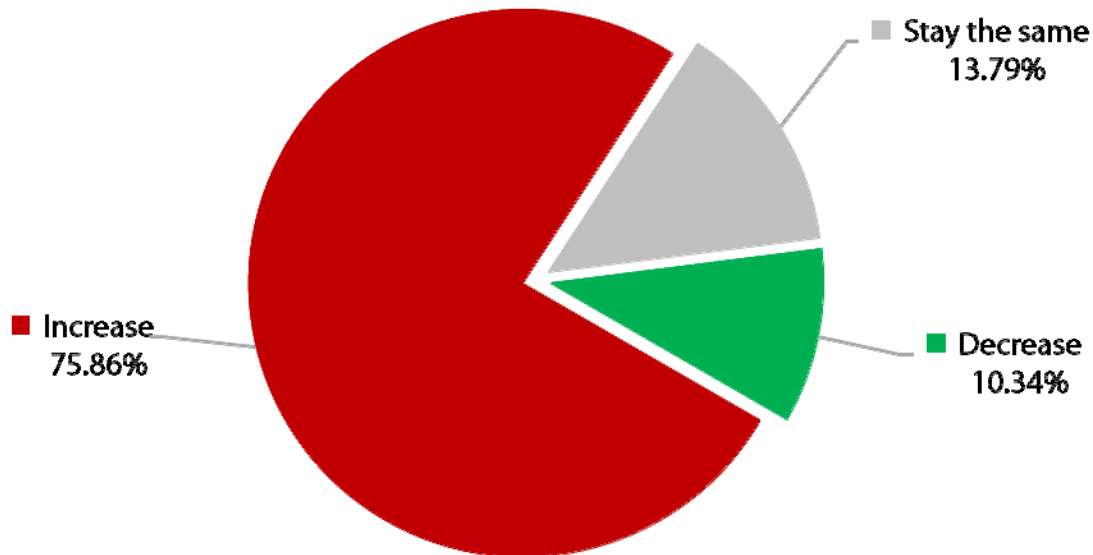
There were 58 responses from local authorities to this survey. None of the questions were mandatory, so the total amount of responses differs from question to question. Individual details of respondents have been kept confidential. Results of the survey should be treated as a snapshot of current opinions of those working in sports and leisure services rather than a thorough analysis of change over time.

Survey respondents by location:



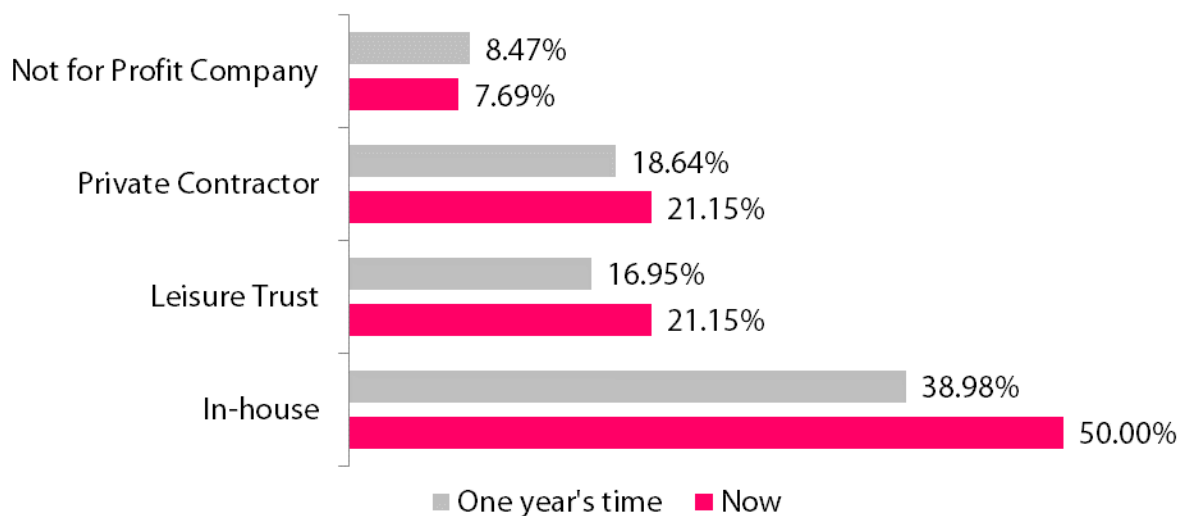
Section 1 – The Service

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



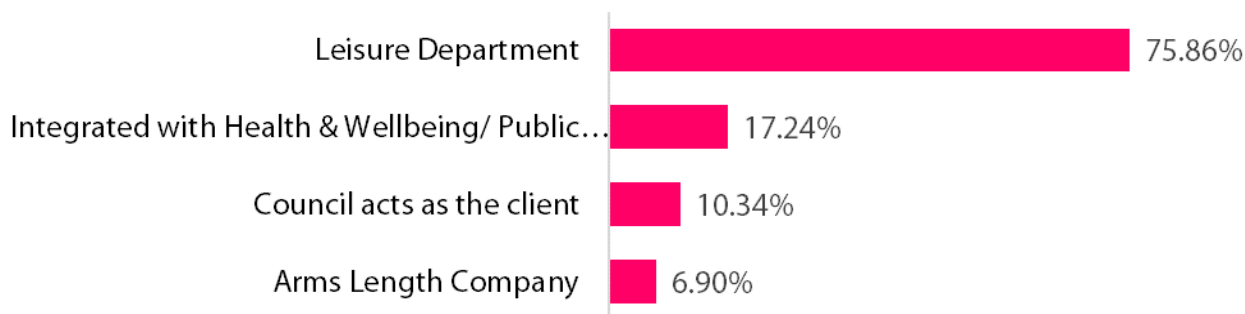
Respondents to the survey largely expect that the workload of the leisure section will increase over the next 12 months (75.86%) or stay the same (13.79%).

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, 11.02% less expected to be managed in-house, 4.20% less expected to be managed by a leisure trust, 2.51% less expected to be managed by a private contractor and 0.78% more expected to be managed by a not for profit company.

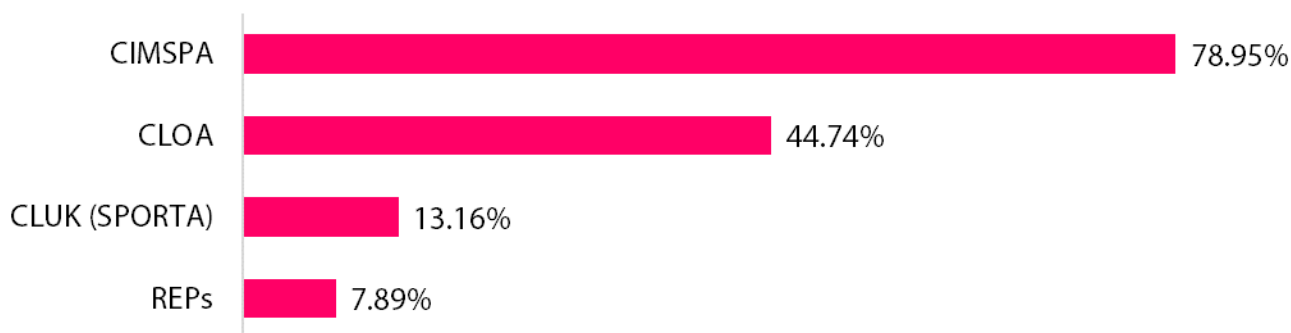
If in-house, which of the following apply?



75.86% of in-house respondents are leisure departments, 17.24% are integrated with Health & Wellbeing / Public Health, 10.34% have an arrangement where the Council acts as the client and 6.90% are an Arm's Length Company.

Are you a member of any industry governing bodies?

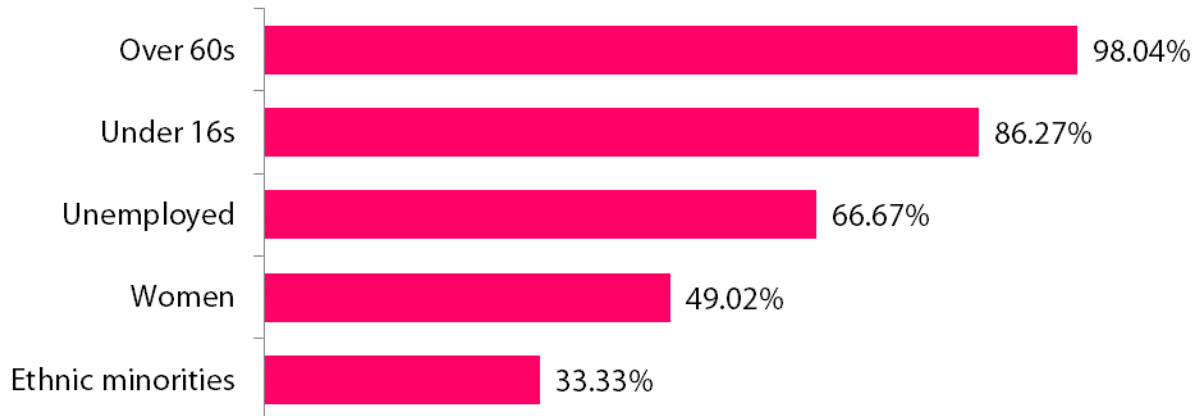
(Tick all that apply)



78.95% of respondents to the survey are a member of the Chartered Institute for the Management of Sport and Physical Activity (CIMSPA), 44.74% are members of the Chief Cultural & Leisure Officers Association (CLOA), 13.16% are members of Community Leisure UK (CLUK (SPORTA)) and 7.89% are members of the Register of Exercise Professionals (REPs).

Respondents also identified being members of BASRaT, RLSS, STA and UKACTIVE.

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

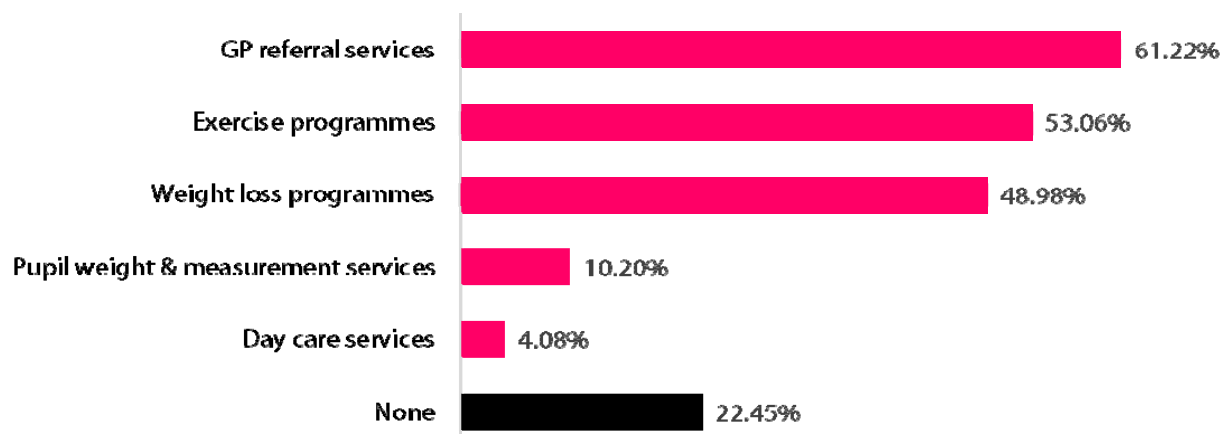


98.04% of respondents actively encourage participation from over 60s; participation is also encouraged from the under 16s (86.27%), the unemployed (66.67%), women (49.02%) and ethnic minorities (33.00%).

Respondents also actively encouraged provision from:

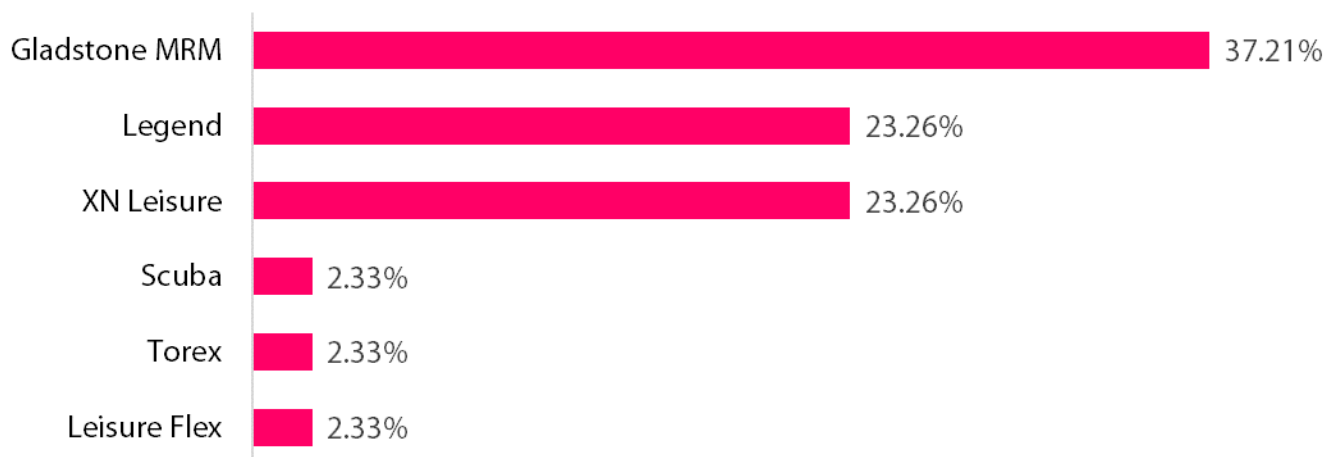
- People with disabilities/disability groups
- Those on low incomes/Universal Credit
- People in certain geographic locations
- The armed forces
- Looked after children
- Students

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



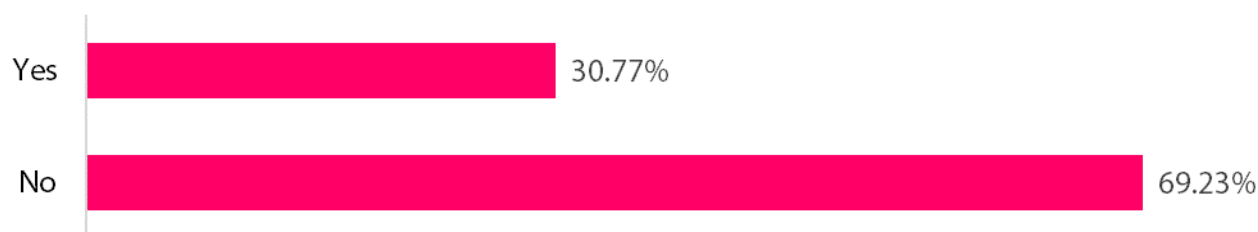
61.22% of respondents have been commissioned by their local Health Board to provide GP referral services, 53.06% to provide exercise programmes, 48.98% to provide weight loss programmes, 10.20% to provide pupil weight and measurement services and 4.08% to provide day care services. 22.45% have not been commissioned to provide any of the above services.

Which software package do you use for managing leisure?



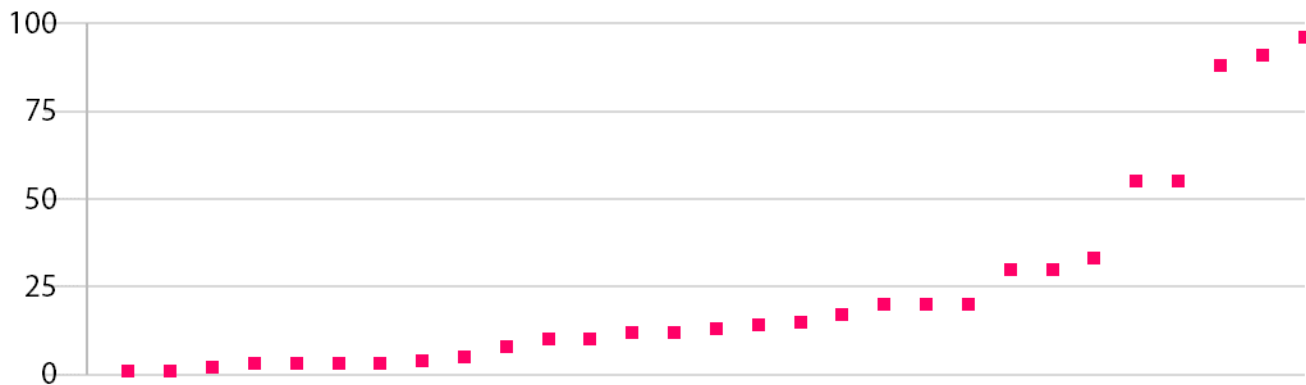
The most popular software package for managing leisure among respondents is Gladstone MRM (37.21%), followed by XN Leisure (23.26%), Legend (23.26%), Leisure Flex (2.33%), Scuba (2.33%) and Torex (2.33%). Other packages in use included Fidelity Total Control, SportSoft and various different in-house software.

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



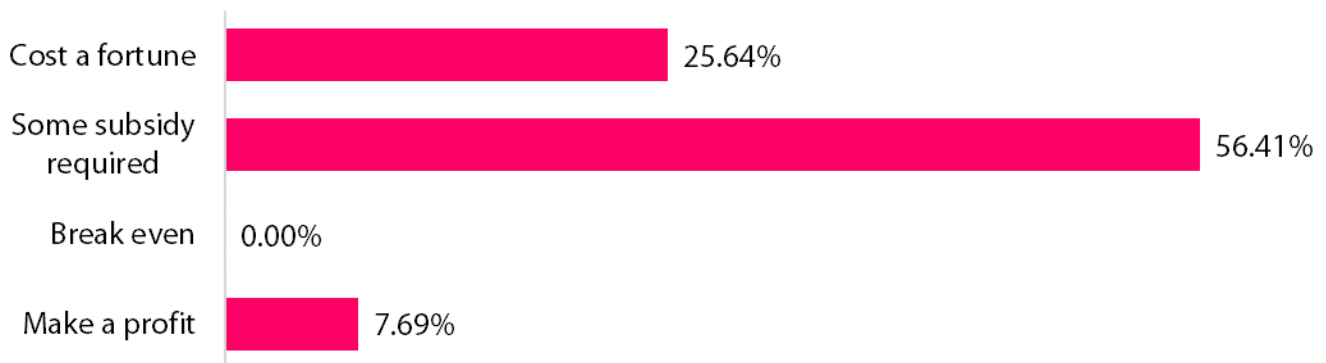
The majority of respondents have not established any new pitches over the last 2 years (69.23%).

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



Survey respondents maintained anywhere from 1 pitch up to 96 sports pitches.

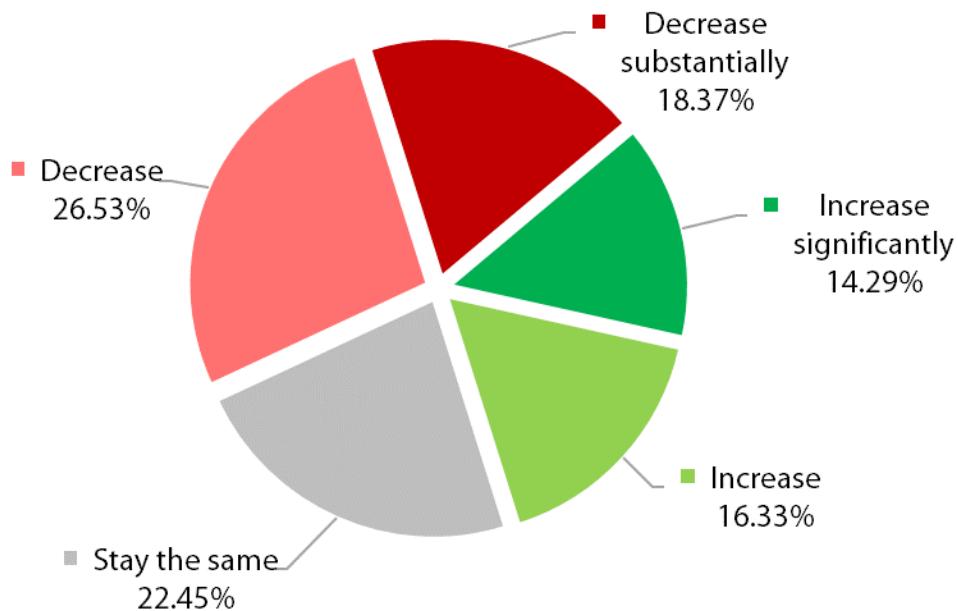
What is the financial cost of pitches to the Council?



Most of the respondents reported that some subsidy was required towards the cost of pitches to the Council (56.41%). Only 7.69% said that their pitches made a profit.

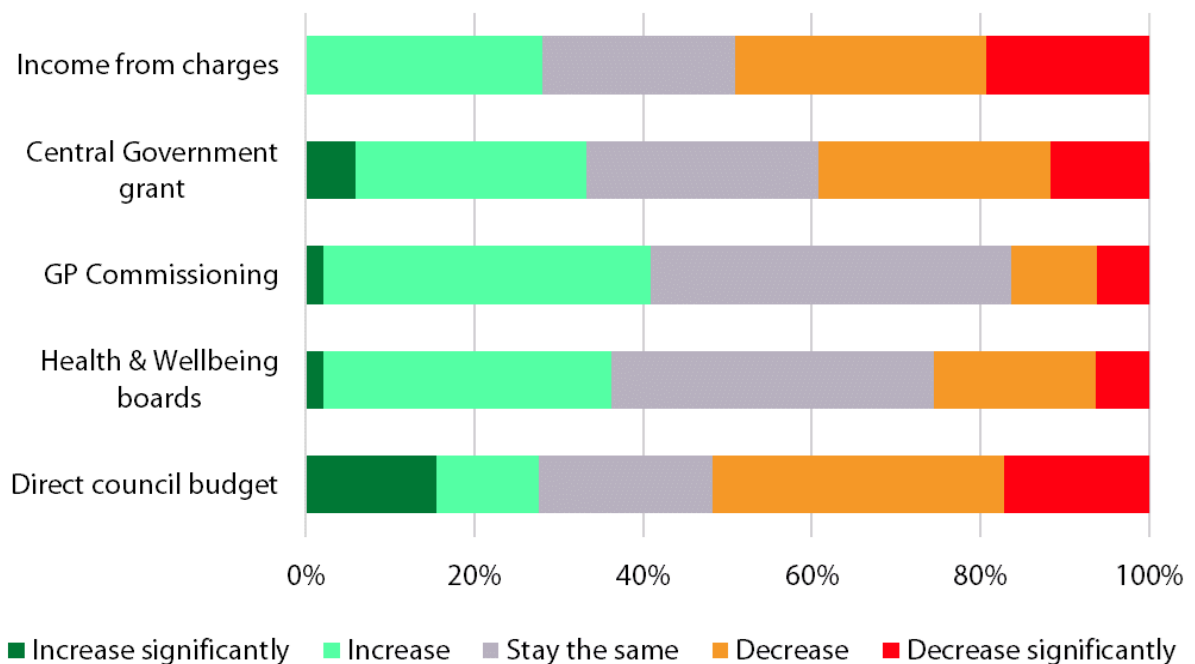
Section 2 - Funding

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



The majority of respondents expect the leisure budget to either decrease (26.53%) or decrease substantially (18.37%) next year. 16.33% expected that the budget will increase, and 14.29% expected it to increase significantly.

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



28.07% of respondents expect that income from charges will increase, with 22.81% thinking it will stay the same and 49.12% expecting it to decrease.

36.17% of respondents expect that funding from Health & Wellbeing boards will increase, 38.30% think it will stay the same, and 25.53% think it will decrease.

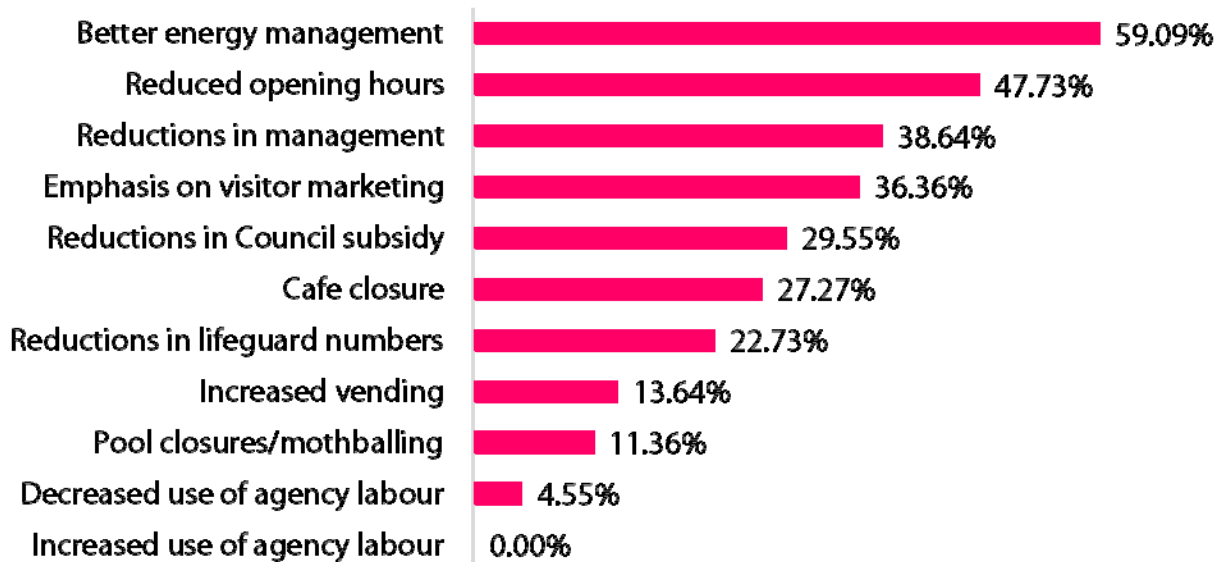
40.82% expect that funding from GP Commissioning will increase, with 42.86% thinking it will stay the same, and 16.33% expecting this to decrease.

27.59% expect their funding from direct council budget to increase, 20.69% expect this to stay the same and 51.72% expect their direct council budget to decrease.

33.33% of respondents expect the Central Government grant to increase, 27.45% expect it to stay the same, and 39.22% 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?



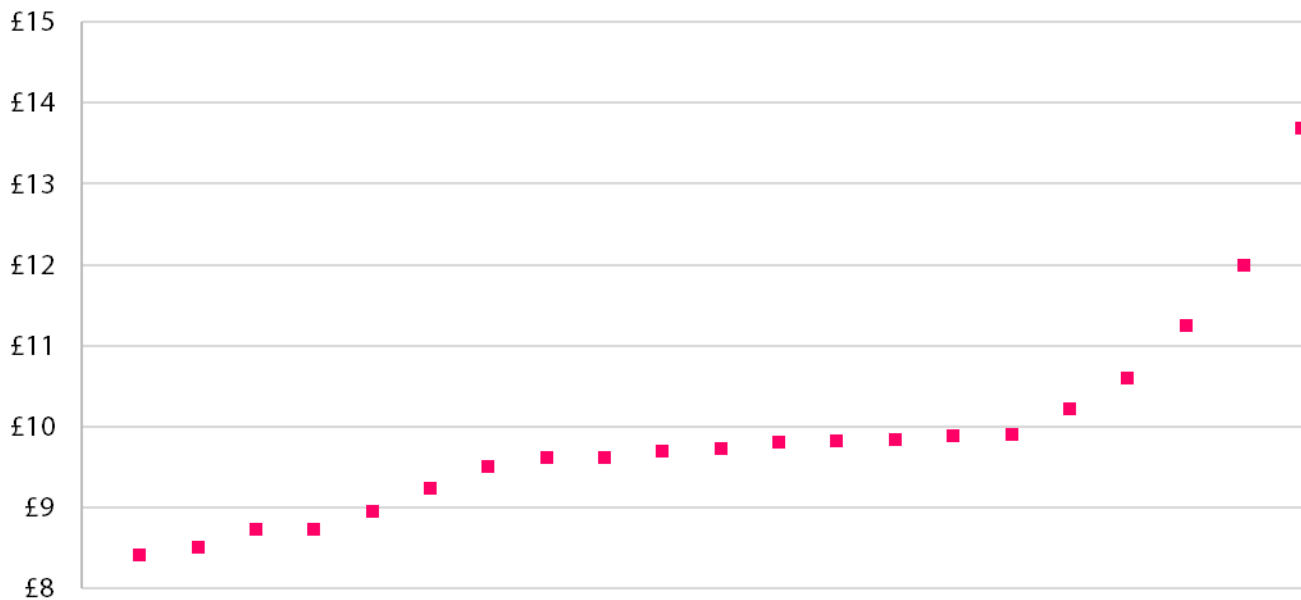
The majority of respondents expect better energy management (59.09%), with 47.73% expecting reduced opening hours, 38.64% expecting reductions in management and 36.36% emphasis on visitor marketing.

Other changes expected from individual respondents include:

- Reductions in staff
- Efficient systems
- Possible facility closures
- Reduction in programme
- Increase in council subsidy
- Loss of crèche
- Timetable changes
- More online/digital services

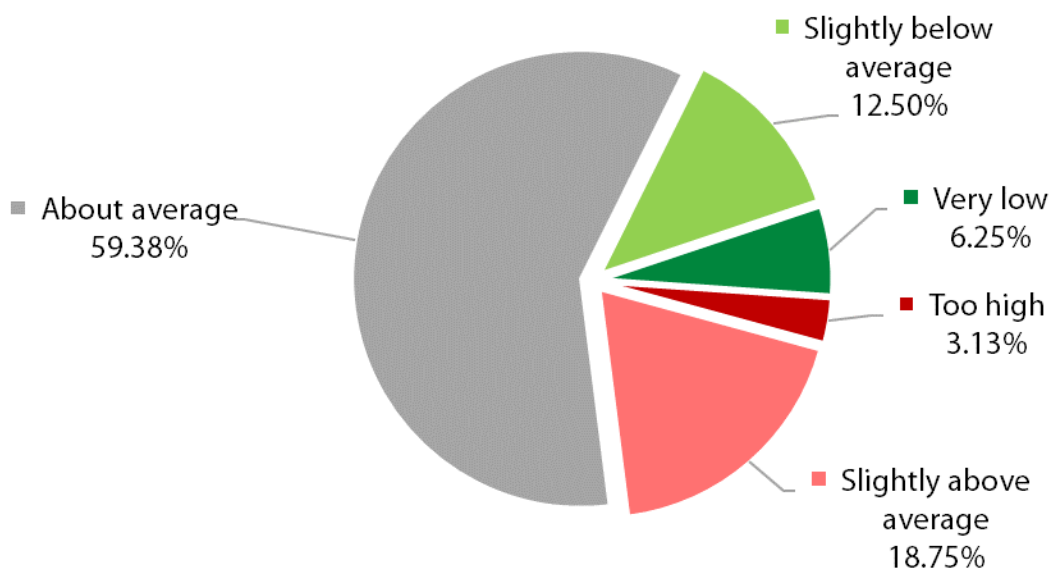
Section 4 – Staffing

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



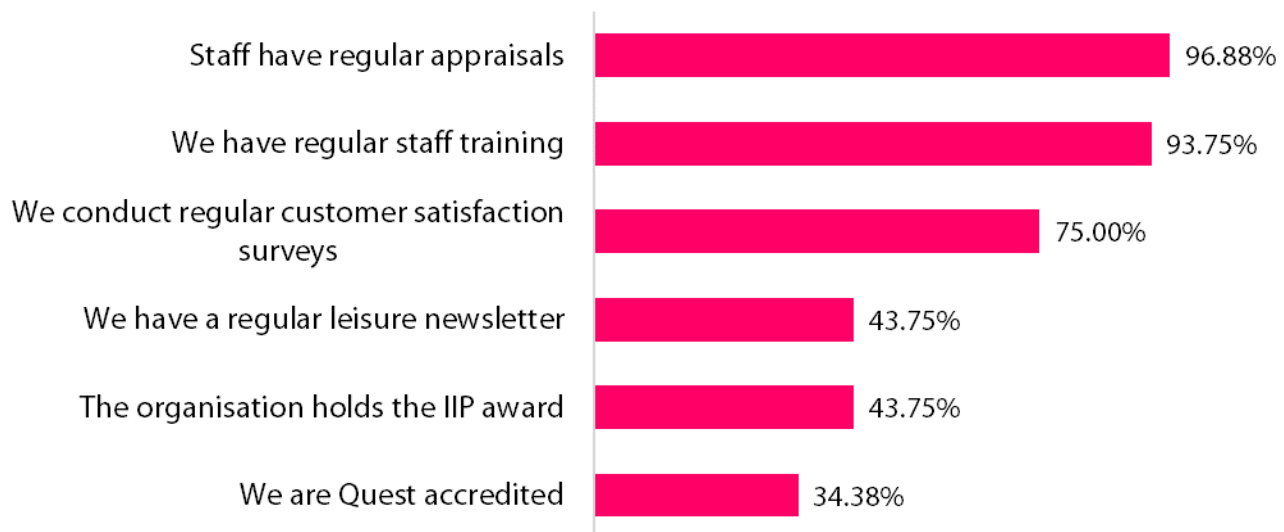
The basic current hourly rate for leisure staff before tax was an average of £9.89, a median of £9.72 with a low of £8.41 and a high of £13.69.

Are staff absence levels at an acceptable level?



Opinions on whether staff absence levels were at an acceptable level was felt to be about average by the majority of respondents (59.38%) with 21.88% answering 'slightly above average' or 'too high' and 18.75% answering 'slightly below average' or 'very low'.

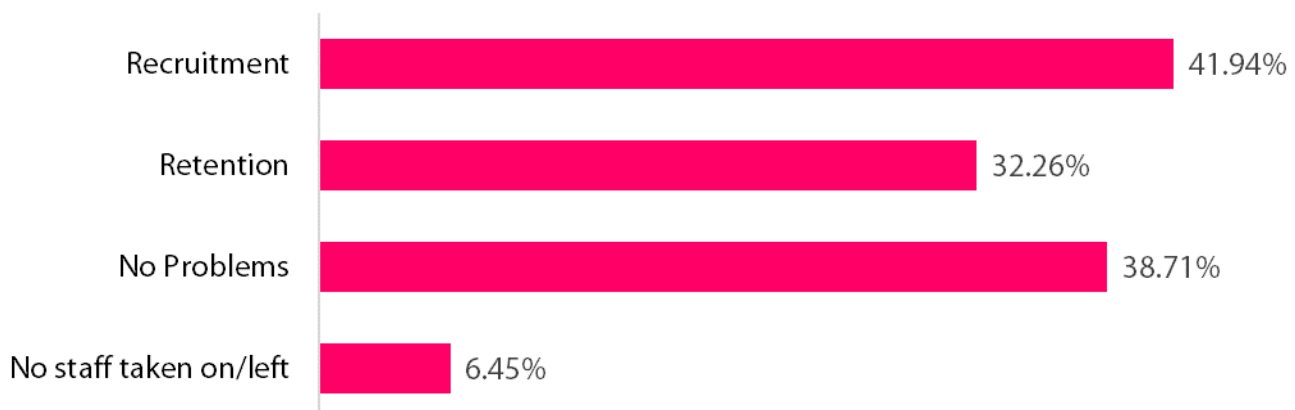
Staff Training and Quality - Please tick all that apply



On the question related to staff training and quality indicators held by responding councils, 96.88% have regular staff appraisals, 93.75% have regular staff training, 75.00% conduct regular customer satisfaction surveys, 43.75% have a regular leisure newsletter, 43.75% hold an Investors in People award and 34.38% are Quest accredited.

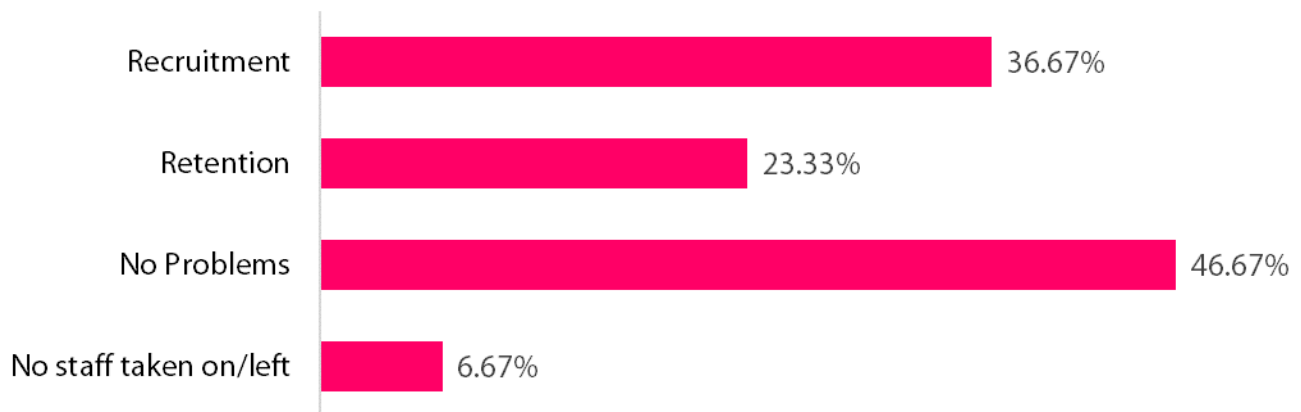
Where have you had difficulty recruiting or retaining staff (over the last 12 months)?

Lifeguards



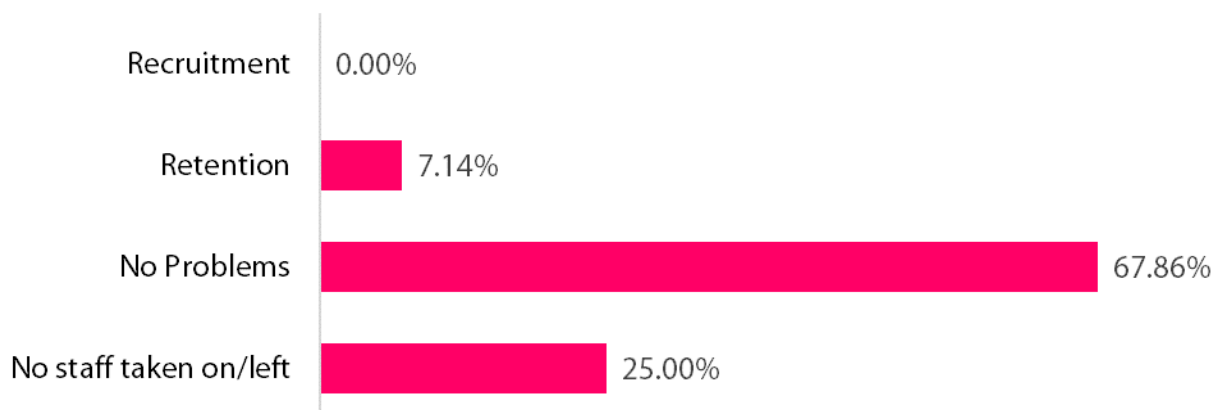
41.94% of respondents have had difficulties with recruiting lifeguards in the past 12 months and 32.26% have had issues retaining lifeguards. 38.71% reported as having no problems with the above. 6.45% said no staff had been taken on or left.

Instructors



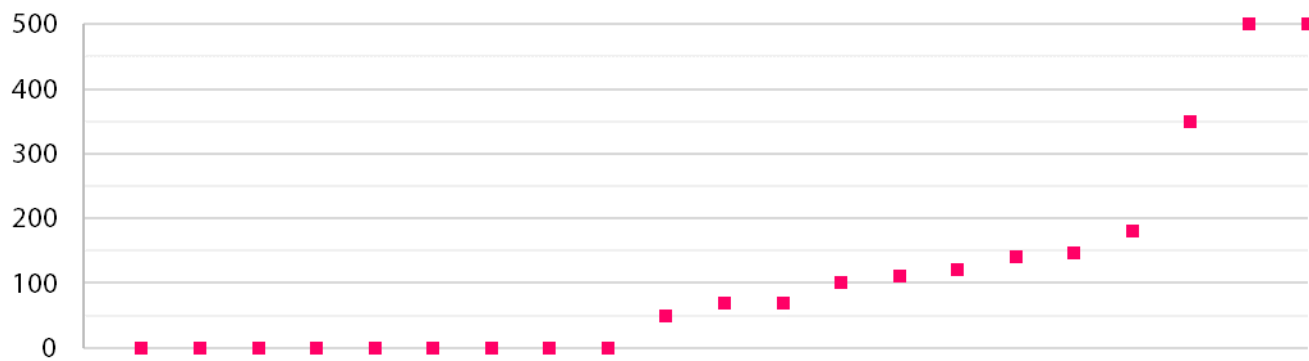
36.67% of respondents have had difficulties with recruiting instructors in the past 12 months and 23.33% have had problems with the retention of staff. 46.67% reported that they had no problems with either recruitment or retention. 6.67% said that no staff had been taken on or left.

Technical / Managerial staff



Compared to the issues faced with employing lifeguards and instructors, no respondents had difficulties recruiting technical / managerial staff, and only 7.14% had issues retaining them. 67.86% reported as having no problems with either of the above, and 25.00% of respondents said that no technical / managerial staff had been taken on or left.

How many staff have you furloughed during the pandemic?

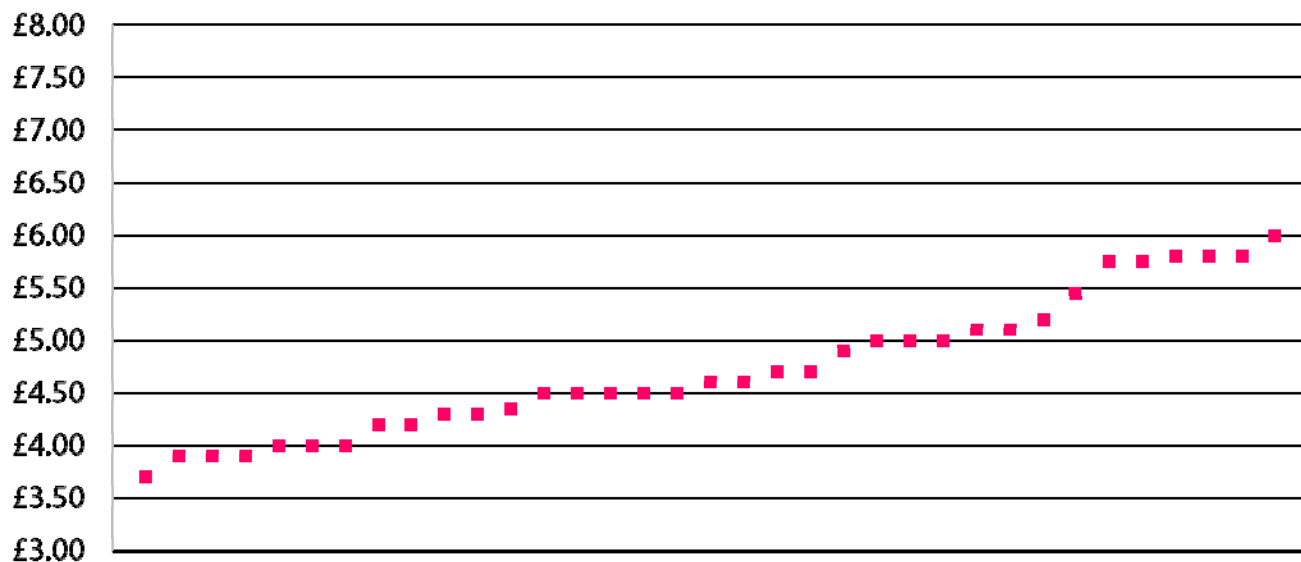


Respondents to the survey have furloughed between 50 and 500 staff, though many reported as having furloughed zero staff.

Section 5 - Charges

What is the charge for a single adult swim?

Average price: £4.82

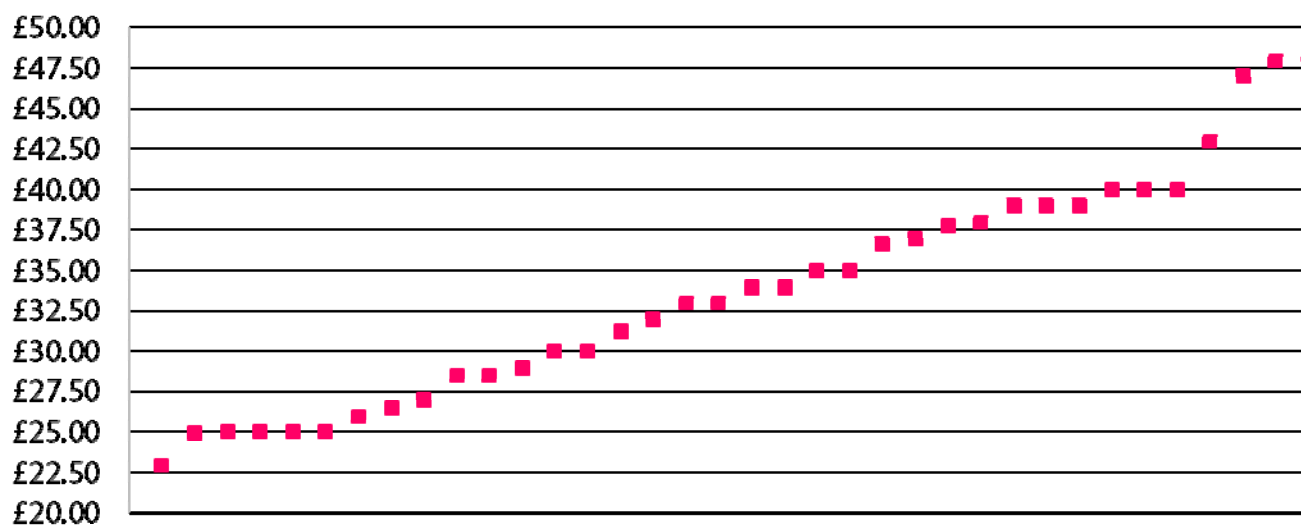


The charge for a single adult swim ranged from £3.70 to £8.00, with an average price of £4.82.

Typical monthly membership fee

Full membership

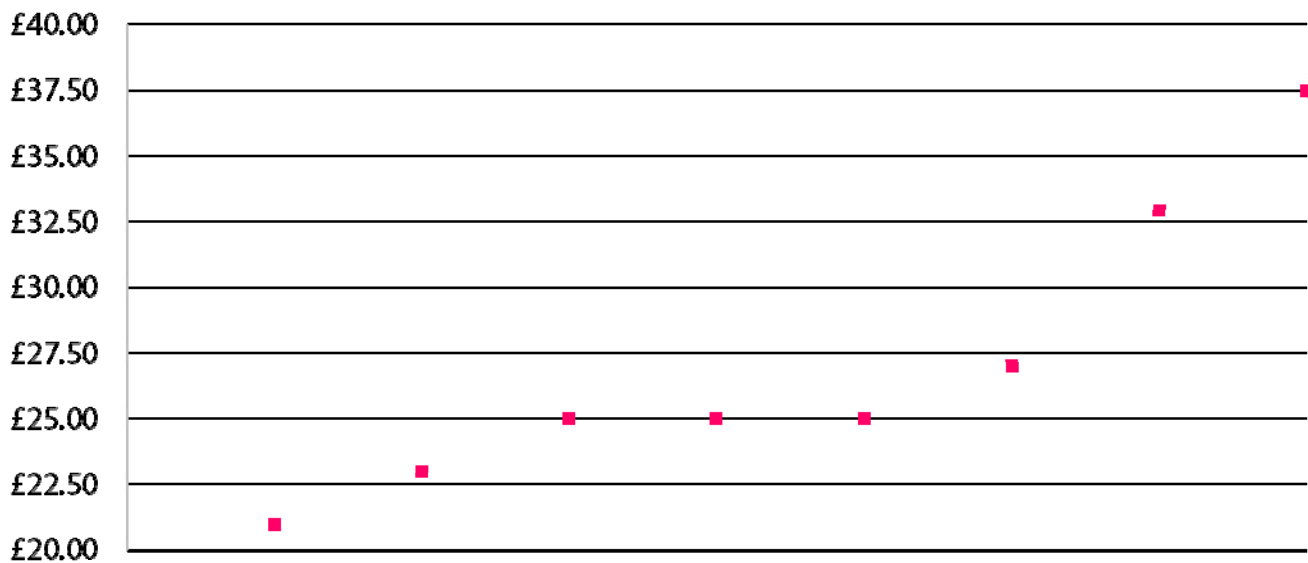
Average price: £33.71



The typical monthly full membership fee ranged from £23.00 to £48.40, with an average price of £33.71.

Off-peak membership

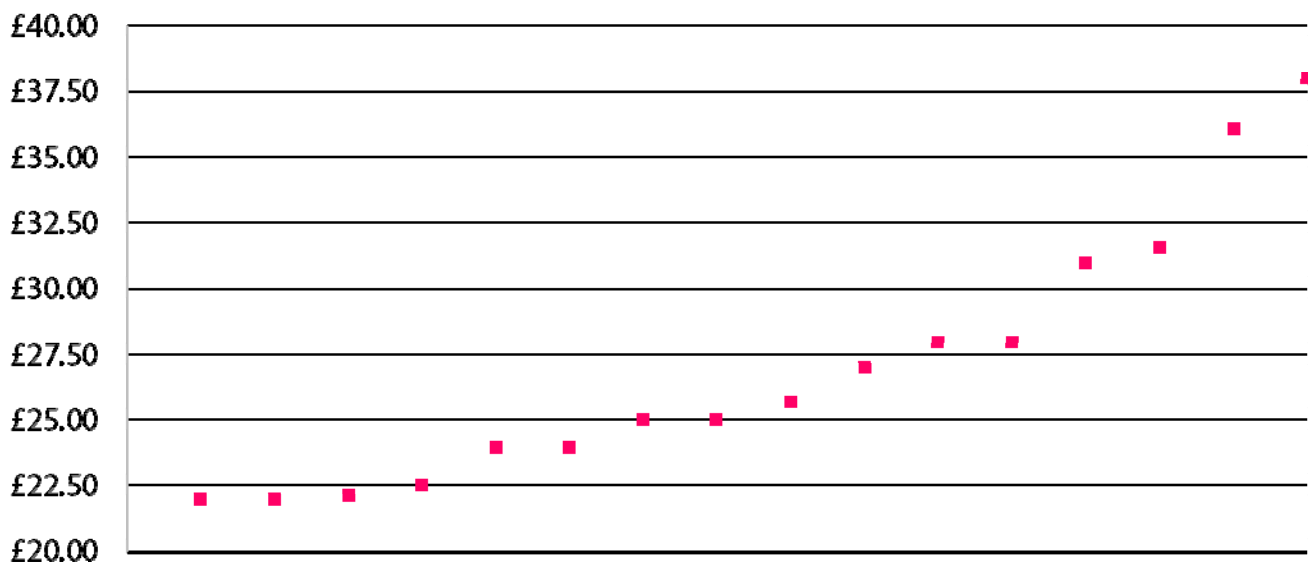
Average price: £27.06



The charge for off-peak membership was not offered by as many authorities, but for those that did offer one the charge ranged from £21.00 to £37.50, with an average price of £27.06.

Swim only

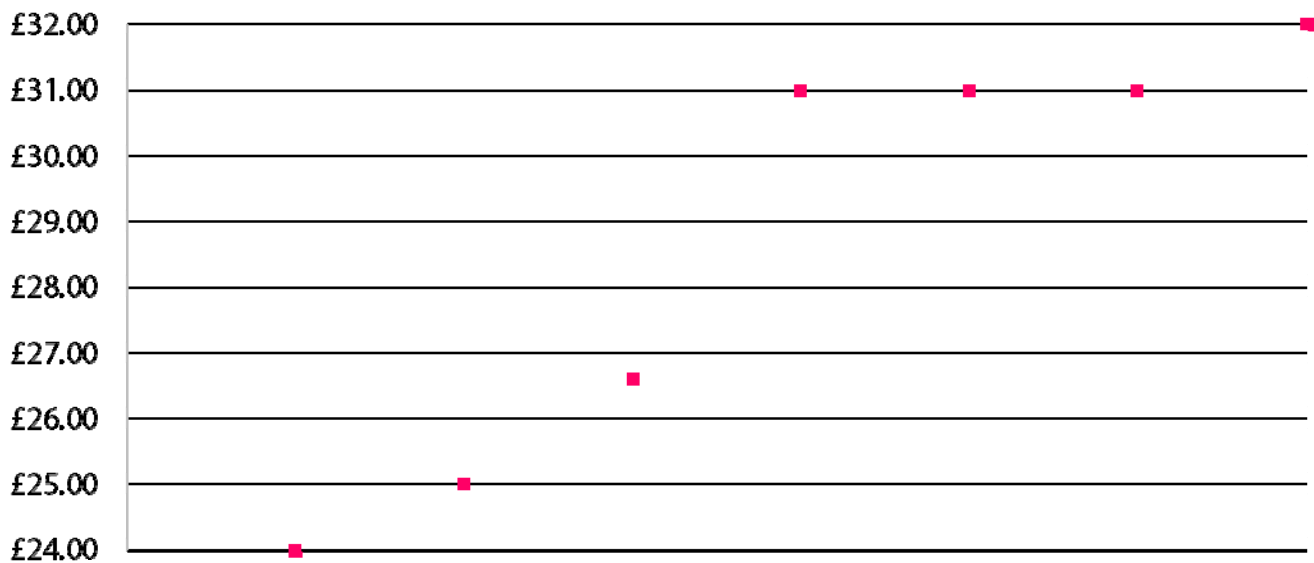
Average price: £27.00



Swim only membership charges ranged from £22.00 to £38.00, with an average price of £27.00.

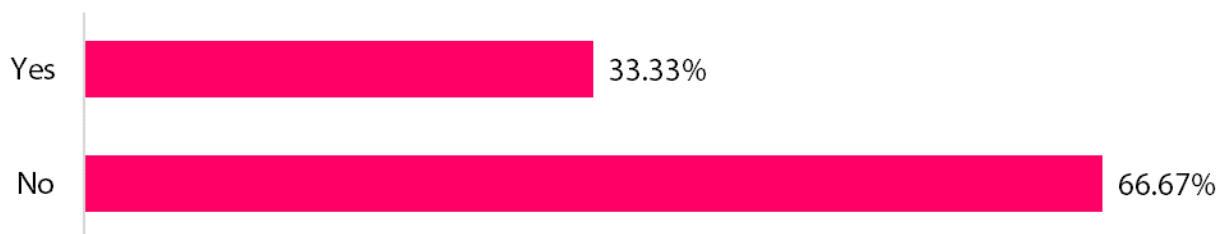
Gym only

Average price: £28.66



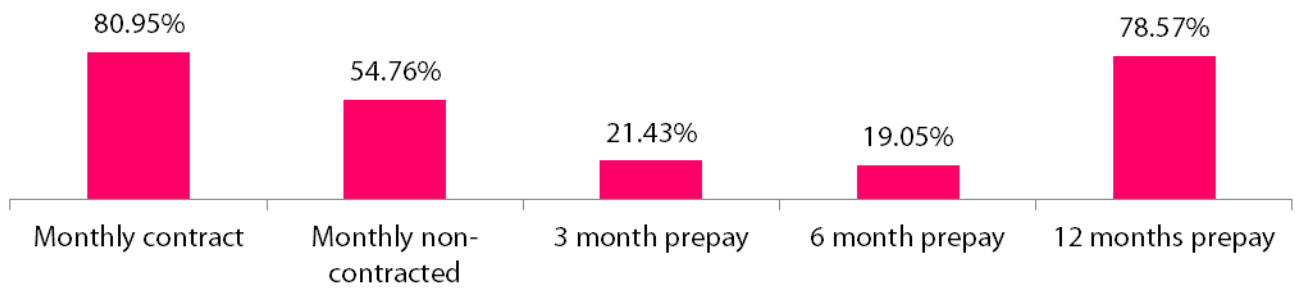
Gym only memberships ranged from £24.00 to £32.00, with an average price of £28.66.

Do you have a joining fee?



33.33% of respondents reported that they did have a joining fee for their leisure facilities. The charge for this was anywhere from £10 up to £31, with around £15-20 being the most common fee, and that this fee was occasionally waived as part of special promotions.

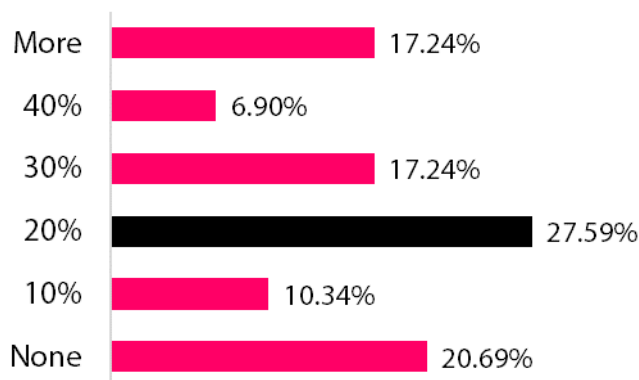
What membership payment types do you offer? (Tick all that apply)



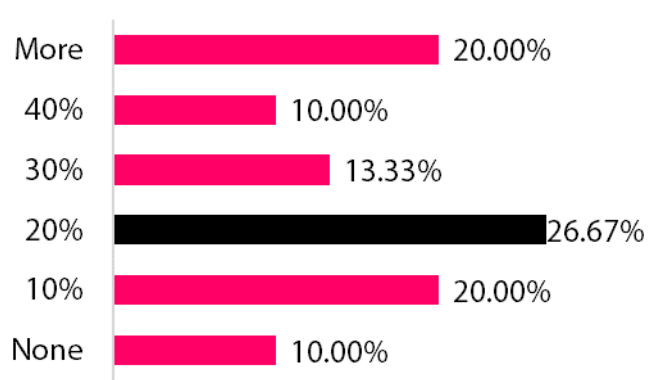
The majority of respondents offered monthly contracts (80.95%), monthly non-contracted (54.76%) and 12 months prepay (78.57%) options. Only 21.43% and 19.05% offered 3 and 6 month prepay options.

Membership package discounts offered

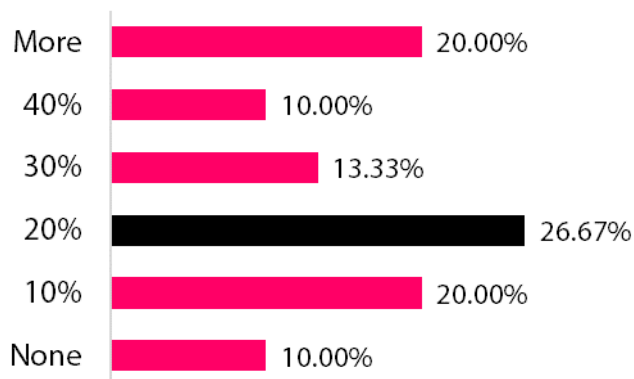
Low incomes



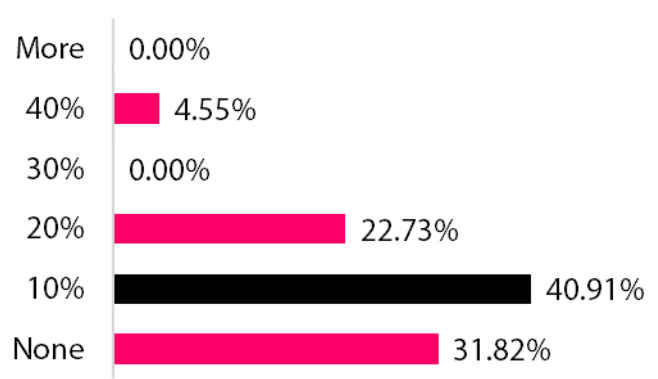
Over 65s



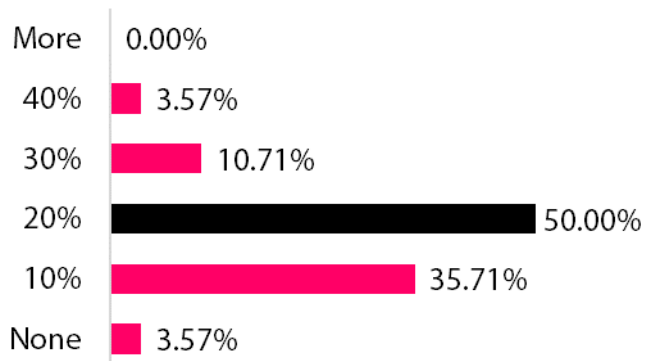
Disability



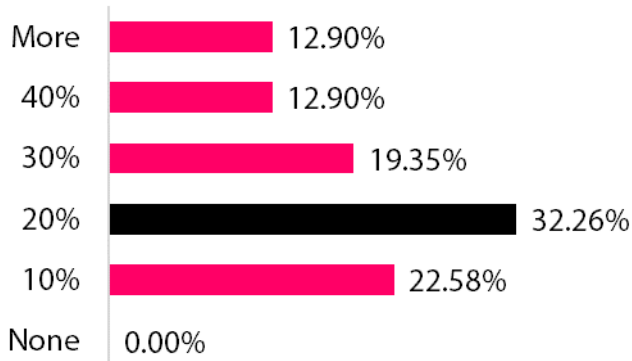
Couples



Corporate

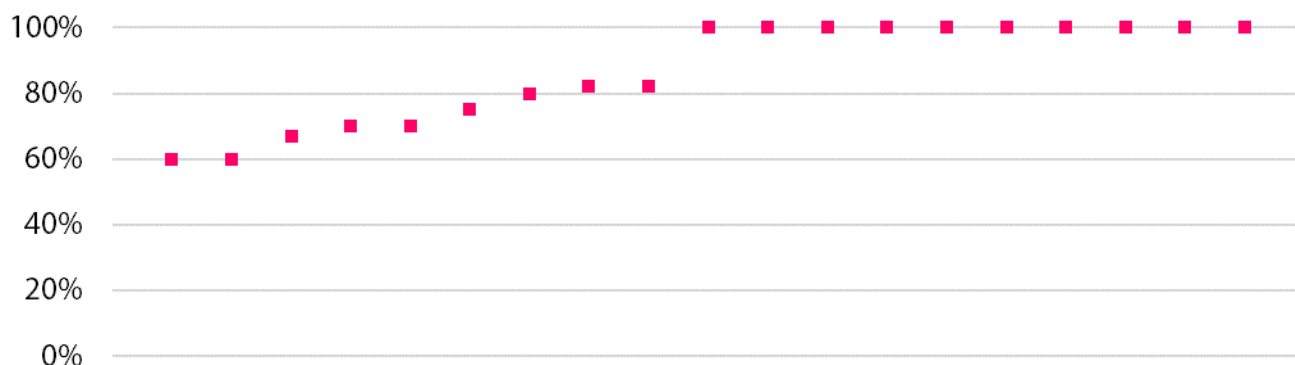


Students



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

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

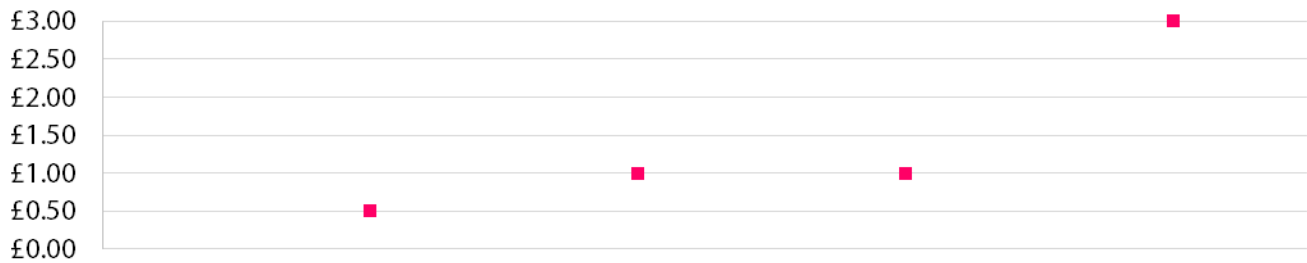


The majority of respondents did not charge for parking at any of their leisure centres (78.13%).

If you charge for parking, what does it cost?

One hour

Average: £1.37



Among the minority of respondents that do charge for parking at leisure centres, the average cost for one hour was £1.37.

Two hours

Average: £1.70



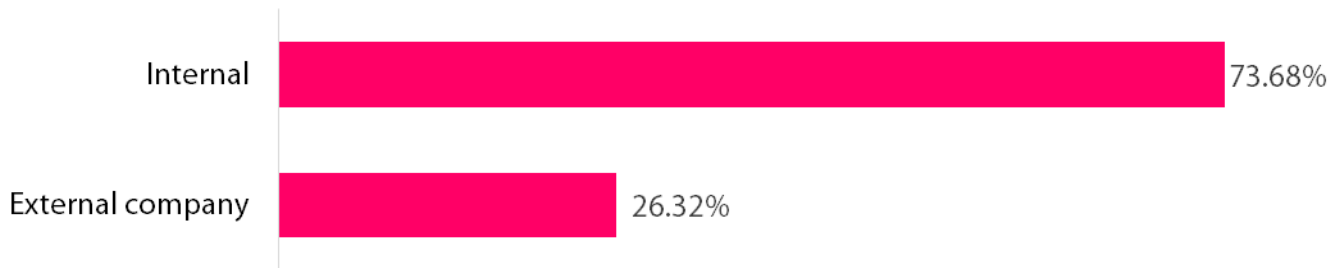
The average charge for parking for two hours was £1.70.

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



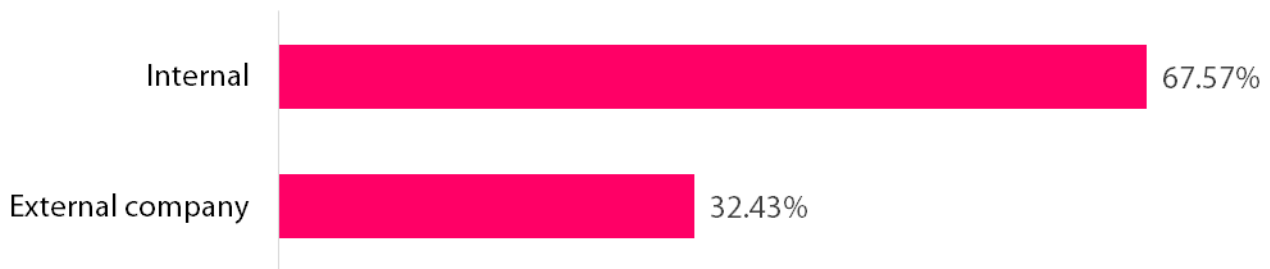
Half of respondents reported that they do refund a proportion of parking charges to leisure centre users (50.00%), and the other half did not (50.00%).

Who manages the direct debit administration?



73.68% of respondents manage direct debit administration internally, and 26.32% use an external company.

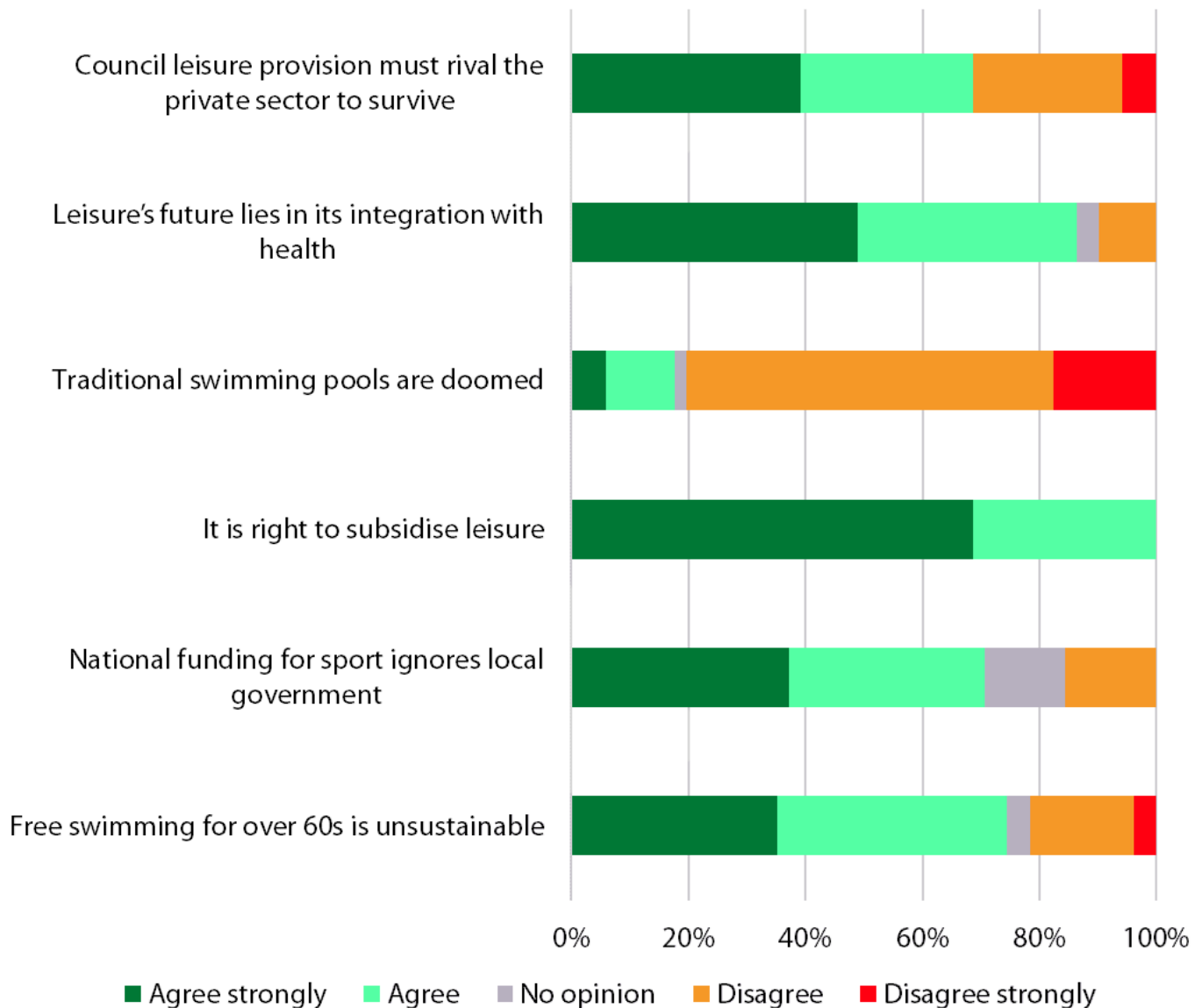
Who chases debtors?



67.57% of respondents chase debtors internally, and 32.43% 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:

- Council leisure provision should be of a high standard but should also differentiate itself from the private sector by providing a targeted offer
- We must rival private sector but also find our niche in the health sector and local place based targeted interventions
- We as a council are leading the way, not being a rival to private

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:

- Targeted health activities
- Online exercise classes / digital solutions
- Group exercise
- Outdoor activities
- Wider family activities
- Swimming lesson provision
- Integration with health services
- Memberships
- Weight management
- New facilities

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

Areas of future decreases identified by survey respondents included:

- Across the board due to public confidence
- Competing with home workout solutions
- Traditional swimming pools
- Competing with other providers
- Swimming and team sports
- Indoor sports (e.g. badminton, squash)
- Exercise referral
- All activities due to social distancing

Local Authority Sports and Leisure Services

State of the Market 2020

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. Due to Covid-19, these are held online at present approximately four times a year. 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