apse membership resources

State of the Market Survey 2021

Local Authority Sports and Leisure Services

December 2021
21-59

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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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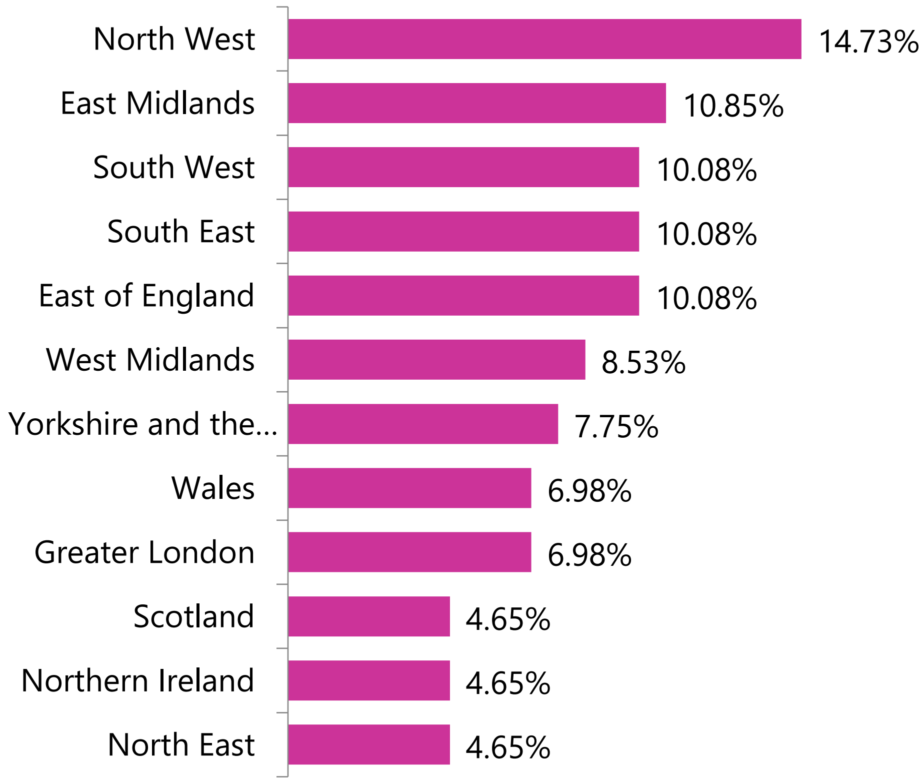
Results at a glance	
Workload	
Percentage expecting the workload of the leisure section to increase over the next 12 months	**82.95%**
Staffing	
Average basic current hourly rate for leisure staff (before tax)	**£10.07**
% of respondents who say staff absence levels are 'slightly above average' or 'too high'	**38.09%**
% of respondents with difficulty recruiting lifeguards	**74.14%**
% of respondents with difficulty recruiting instructors	**73.33%**
% of respondents with difficulty recruiting technical / managerial staff	**31.37%**
Finance and charges	
% expecting the leisure budget to either decrease or decrease substantially	**55.36%**
Average charge for a single adult swim	**£4.89**
Average typical monthly full membership fee	**£34.08**
% of respondents with a joining fee for facilities	**31.96%**
% of respondents who charge for parking at any of their leisure facilities	**30.88%**
Service delivery	
% of respondents who have established any new pitches over the last 2 years	**34.94%**
% of respondents who answered 'some subsidy required' in the financial cost of pitches to the Council	**37.35%**
Expected changes over the next year	
% of respondents expecting reductions in Council subsidy	**50.00%**
% of respondents expecting reductions in management	**37.50%**
% of respondents expecting reduced opening hours	**32.69%**

Sports and Leisure

State of the Market 2021

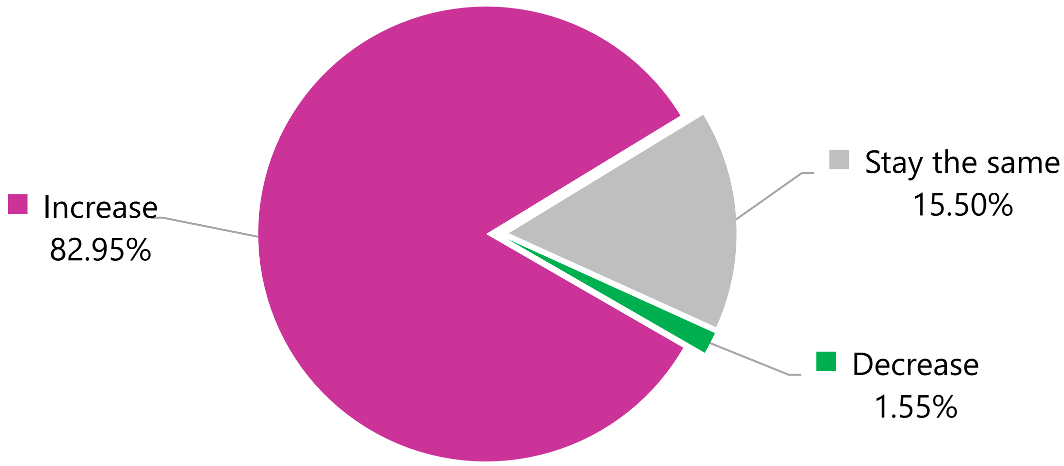
APSE conducted an online survey between August and September 2021. A series of questions were asked covering a range of issues of interest to those officers, managers and councillors responsible for Sports and Leisure services.
State of the Market surveys are an attempt to understand perceptions of the market amongst people directly involved in delivering services.
There were 129 responses from local authorities to this survey. 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, however much of the data can be triangulated to other APSE datasets including APSE performance networks and leisure research.

Survey respondents by location:



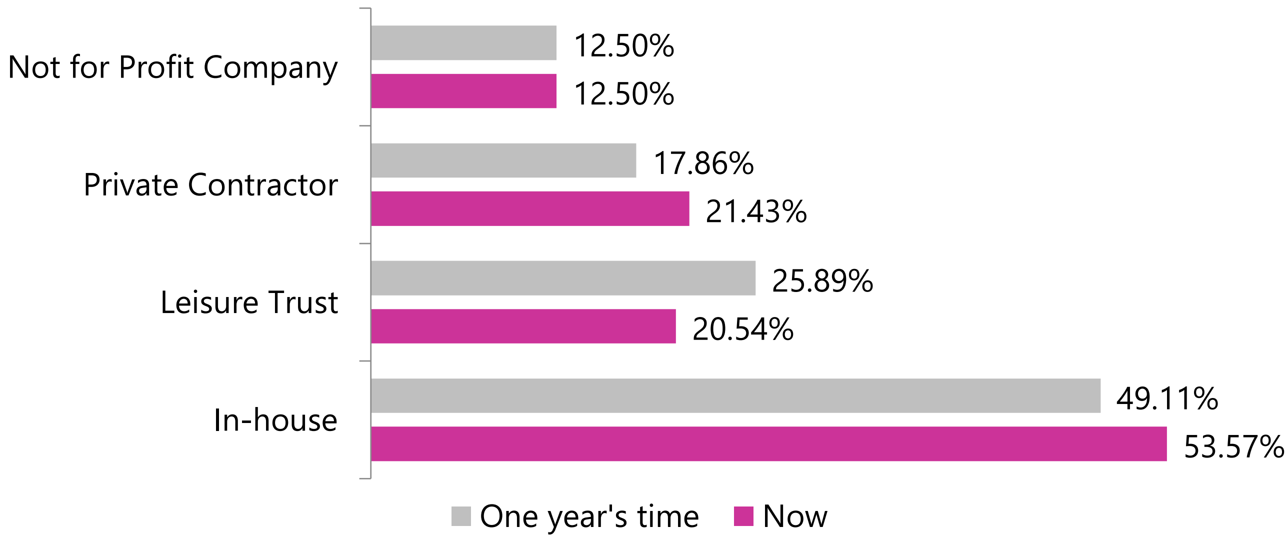
Section 1 – The Service

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



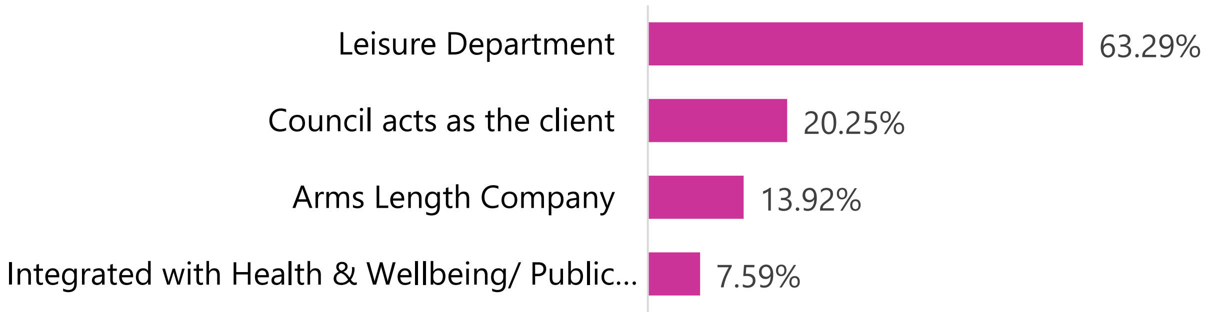
Respondents to the survey largely expect that the workload of the leisure section will increase over the next 12 months (82.95%) or stay the same (15.50%). Only 2 respondents (1.55%) felt that it would decrease.

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



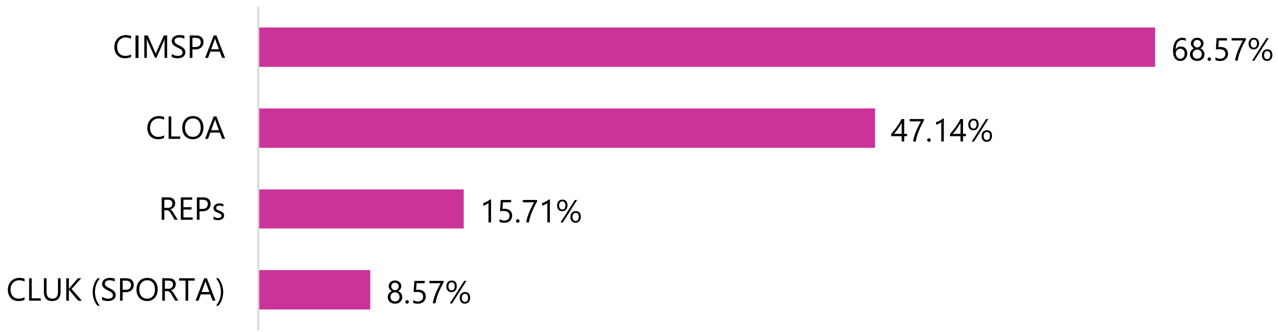
While the majority of respondents expected their service to be managed the same way in 12 months' time, 4.46% less expected to be managed in-house, 5.36% more expected to be managed by a leisure trust and 3.57% less expected to be managed by a private contractor.

If in-house, which of the following apply?



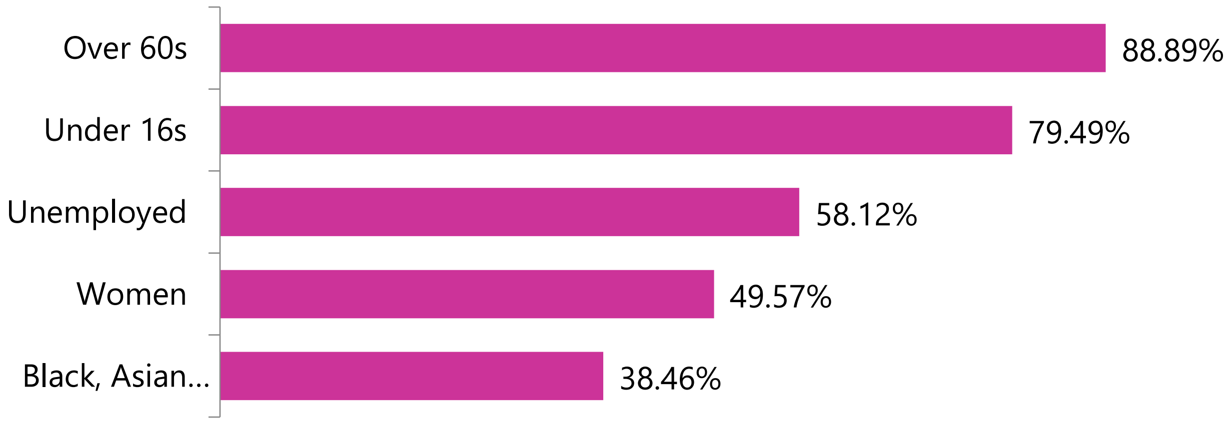
63.29% of in-house respondents are leisure departments, 20.25% have an arrangement where the Council acts as the client, 13.92% are an Arm's Length Company and 7.59% are integrated with Health & Wellbeing / Public Health.

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



68.57% of respondents to the survey are a member of the Chartered Institute for the Management of Sport and Physical Activity (CIMSPA), 47.14% are members of the Chief Cultural & Leisure Officers Association (CLOA), 15.71% are members of the Register of Exercise Professionals (REPs) and 8.57% are members of Community Leisure UK (CLUK (SPORTA)).
Respondents also identified being members of UK Active, BASRaT and PWTAG.

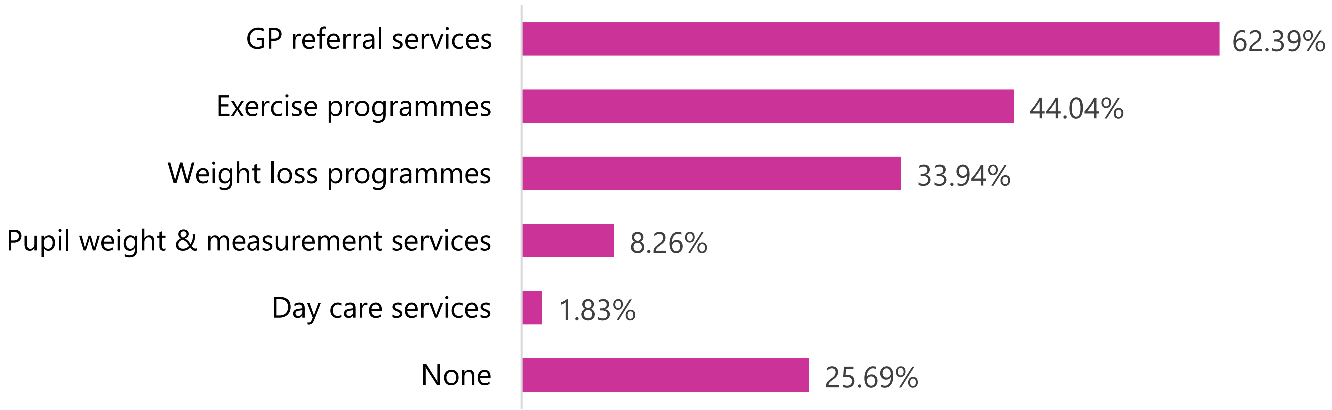
Do you actively encourage participation from particular groups within the community? e.g., promotions, reduced charges, specific closed sessions?



88.89% of respondents actively encourage participation from over 60s; participation is also encouraged from the under 16s (79.49%), the unemployed (58.12%), women (49.57%) and members of the BAME community-(38.46%).
Respondents also actively encouraged provision from:

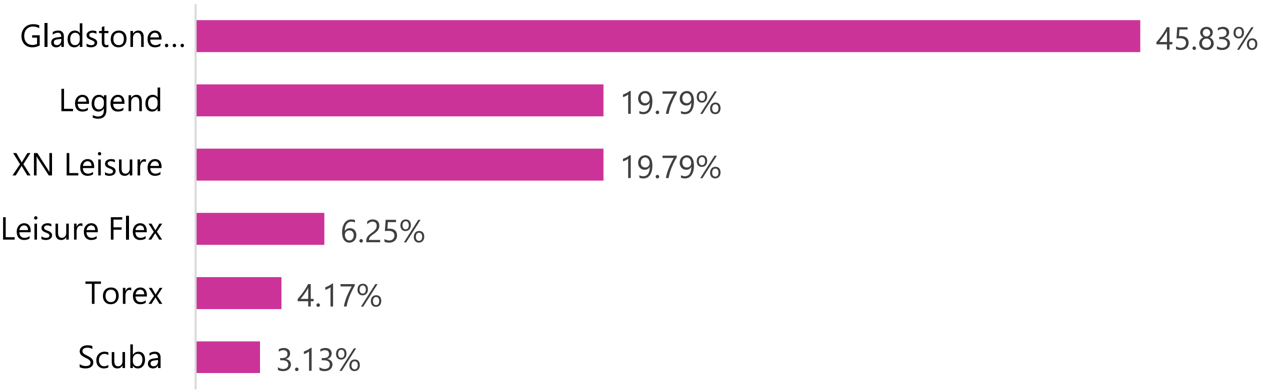
- People with disabilities/disability groups
- Those on low incomes/Universal Credit
- People in certain geographic locations
- The armed forces
- Looked after children
- Students
- Under 25s
- Homeless people
- Carers

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



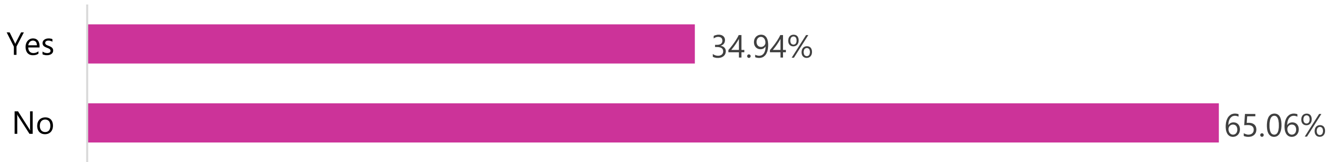
62.39% of respondents have been commissioned by their local Health Board to provide GP referral services, 44.04% to provide exercise programmes, 33.94% to provide weight loss programmes, 8.26% to provide pupil weight and measurement services and 1.83% to provide day care services. 25.69% have not been commissioned to provide any of the above services.

Which software package do you use for managing leisure?



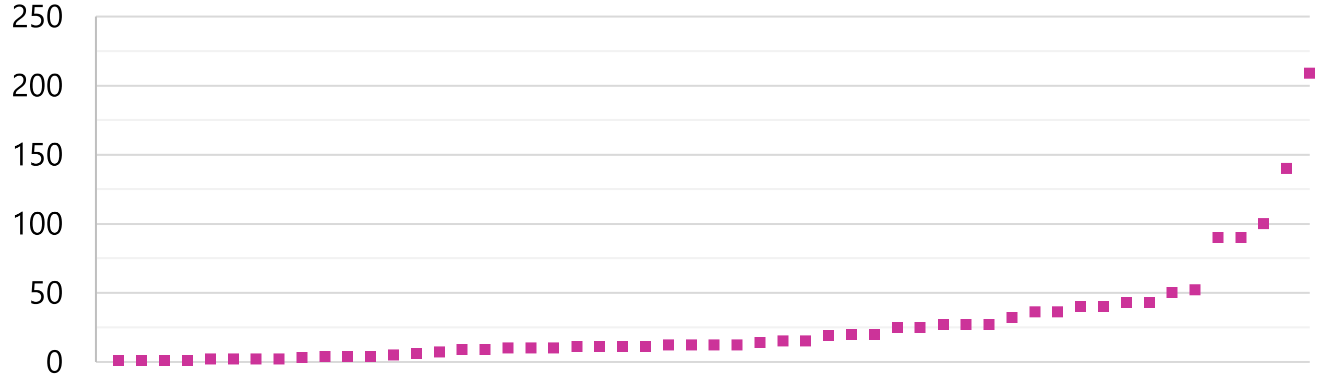
The most popular software package for managing leisure among respondents is Gladstone MRM (45.83%), followed by Legend (19.79%), XN Leisure (19.79%), Leisure Flex (6.25%), Torex (4.17%) and Scuba (3.13%). Other packages in use included Fidelity, Flow and various different in-house software.

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



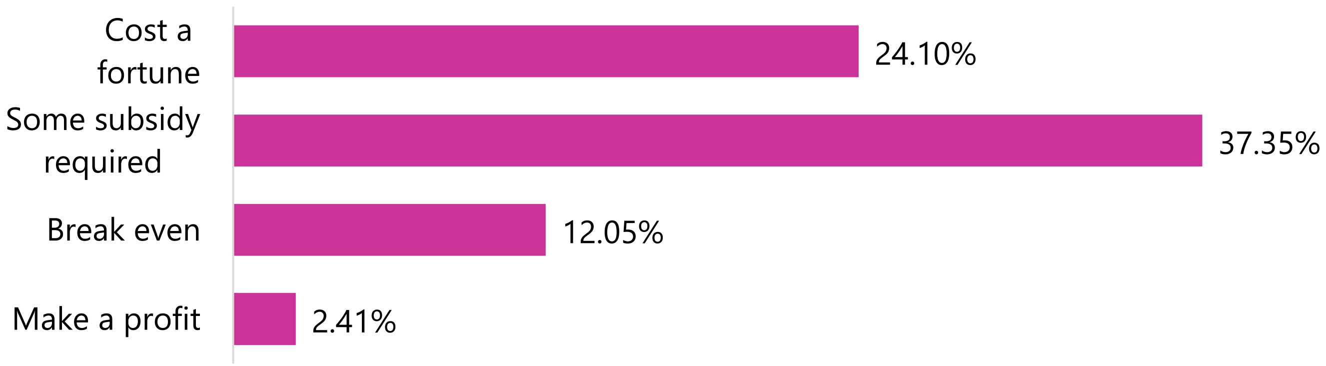
The majority of respondents have not established any new pitches over the last 2 years (65.06%).

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



Survey respondents maintained anywhere from 1 pitch up to 209 sports pitches.

What is the financial cost of pitches to the Council?



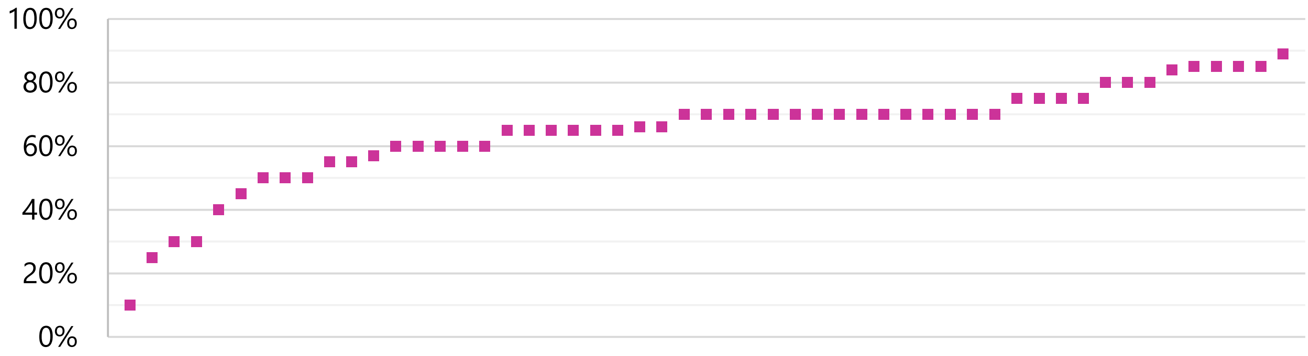
Most of the respondents reported that some subsidy was required towards the cost of pitches to the Council (37.35%). Only 2.41% said that their pitches made a profit.

How many facilities do you have of each type?

Respondents had between 1 and 15 gym only sites, between 1 and 10 swimming only sites and between 1 and 10 combined gym and swimming sites. Respondents expected the majority of facilities to still be open by the end of the year.

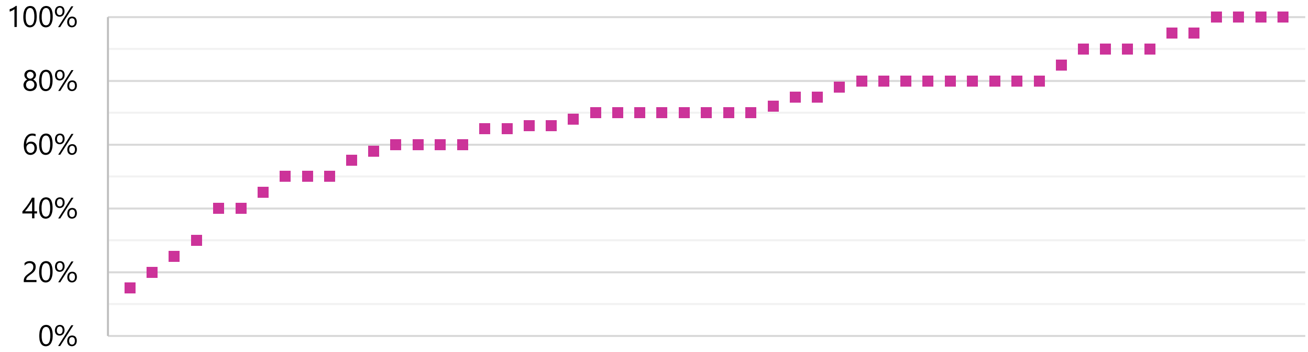
What is your estimate of the number of Gym and Swim attendances compared to pre-COVID (e.g., 70%)?

Gym attendance



The lowest reported attendance figure was 10% and the highest was 89%. The average gym attendance is 64.56%.

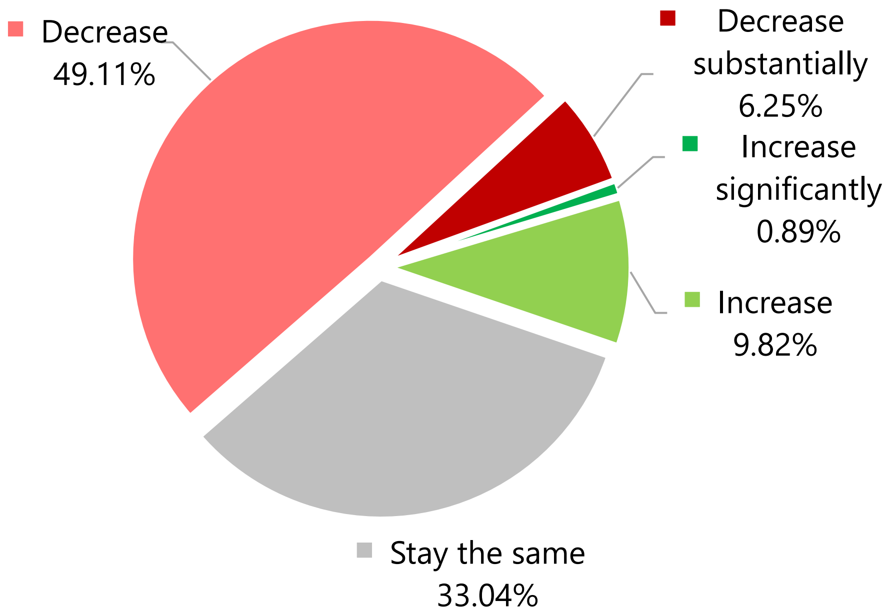
Swimming attendance



The lowest reported attendance figure was 15% and the highest was 100%. The average swimming attendance is 69.11%.

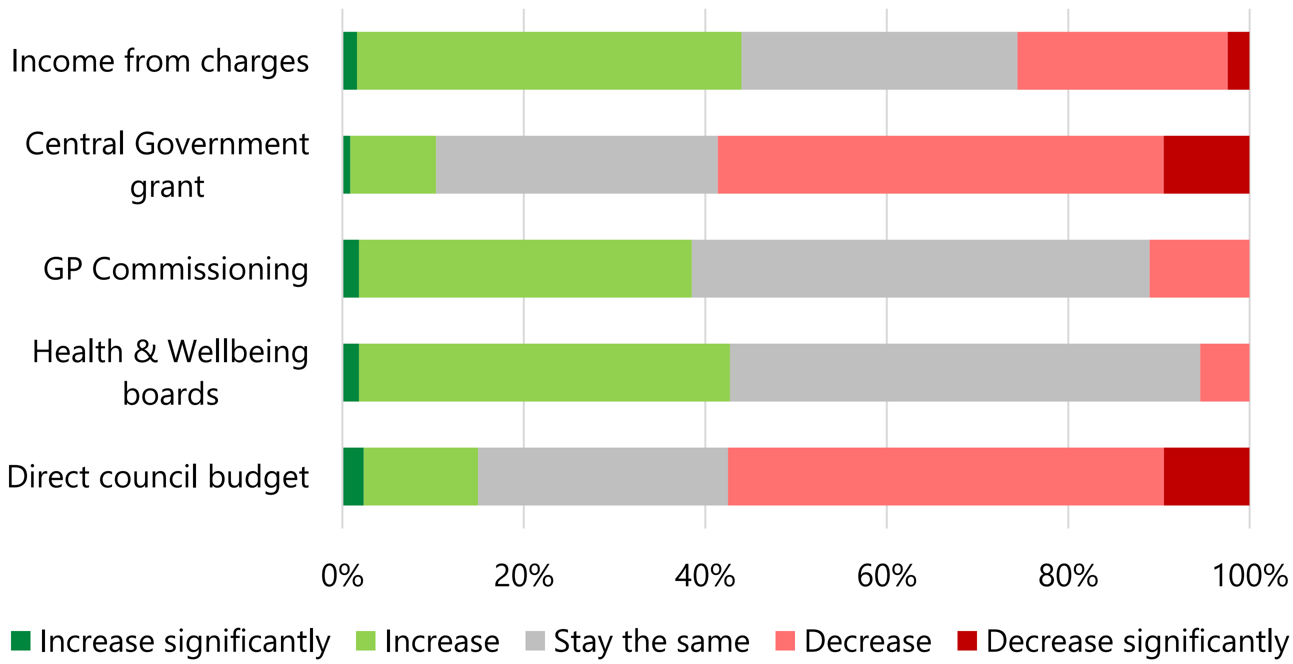
Section 2 - Funding

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



The majority of respondents expect the leisure budget to either decrease (49.11%) or decrease substantially (6.25%) next year. 9.82% expected that the budget will increase, and 0.89% expected it to increase significantly.

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



44.00% of respondents expect that income from charges will increase, with 30.40% thinking it will stay the same and 25.60% expecting it to decrease.

42.73% of respondents expect that funding from Health & Wellbeing boards will increase, 51.82% think it will stay the same, and 5.45% think it will decrease.

38.53% expect that funding from GP Commissioning will increase, with 50.46% thinking it will stay the same, and 11.01% expecting this to decrease.

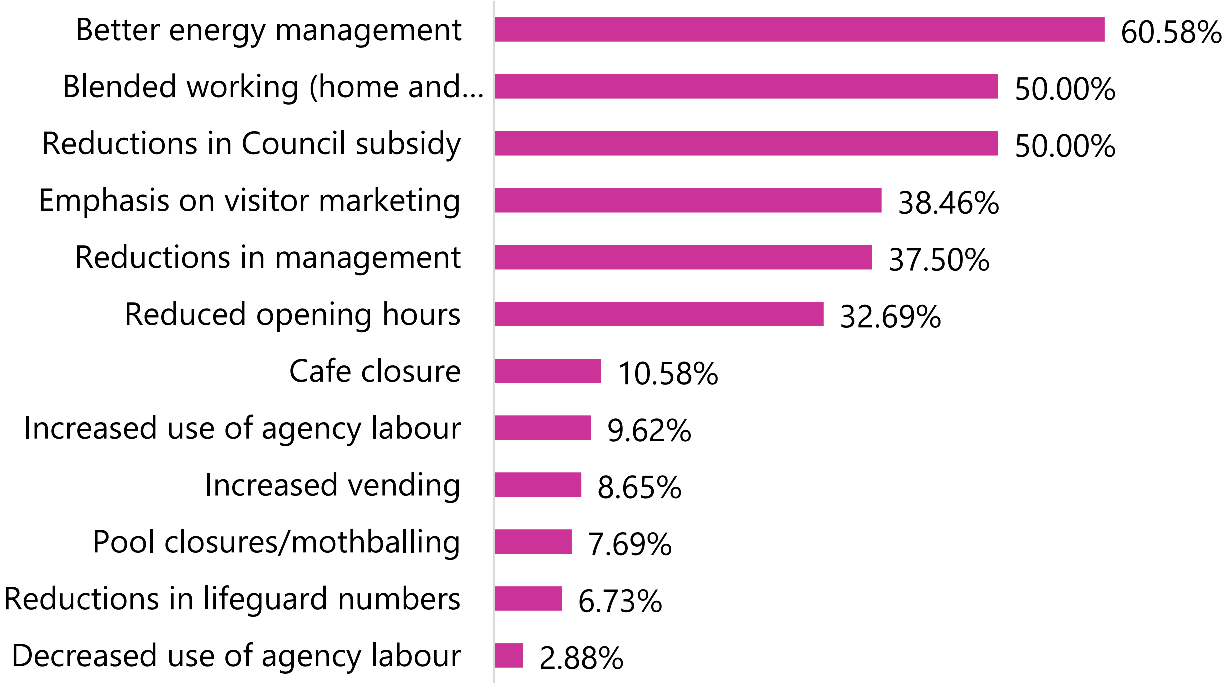
14.96% expect their funding from direct council budget to increase, 27.56% expect this to stay the same and 57.48% expect their direct council budget to decrease.

10.34% of respondents expect the Central Government grant to increase, 31.03% expect it to stay the same, and 58.62% expect it to decrease.

Covid-19 has had a massive impact on the finances of leisure facilities with many seeing their income disappear overnight. Whilst furlough and the leisure recovery fund helped bridge the immediate shortfall, the sector remains significantly below break-even. Combined with developing recruitment and retention issues, the ability to keep facilities open has been severely compromised. A prolonged recovery period will require Authorities to fundamentally review provision.

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?



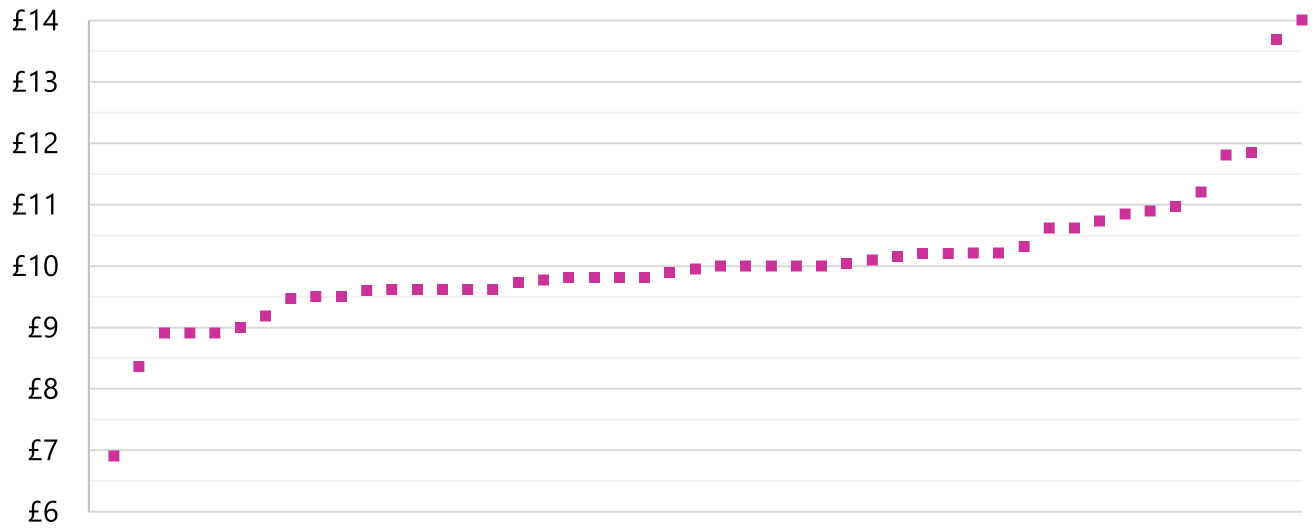
The majority of respondents expect better energy management (60.58%), with 50.00% having blended working arrangements, 50% with reductions in council subsidy, 38.46% with an emphasis on visitor marketing, 37.50%. with reductions in management and 32.69% with reduced opening hours.

Other changes expected from individual respondents include:

- Closure of facilities
- Staffing reductions
- More commercially driven services
- Greater partnership working
- Increased prices

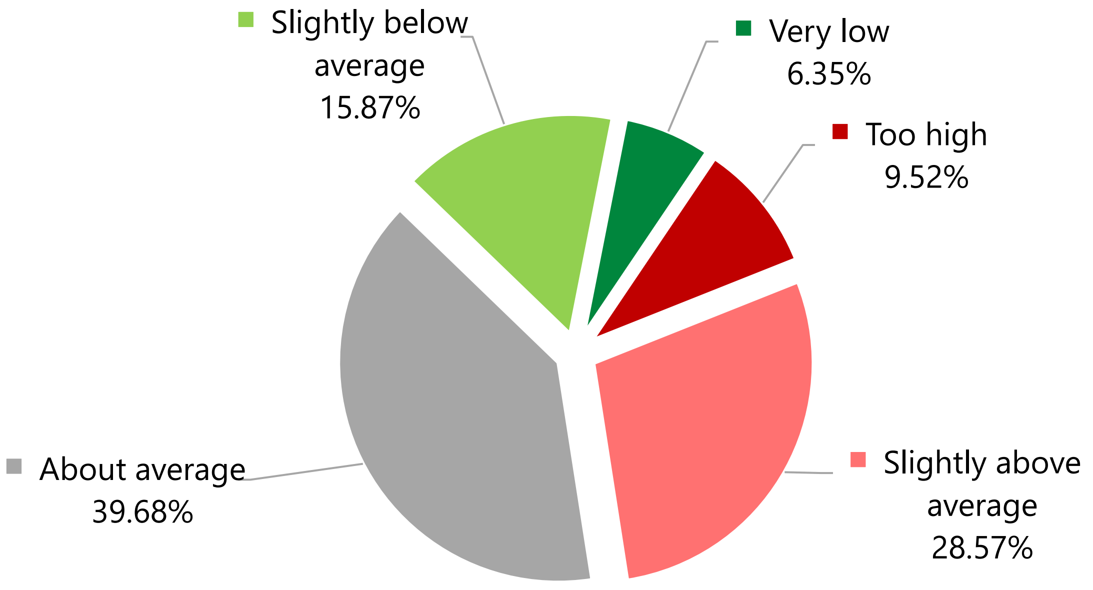
Section 4 – Staffing

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



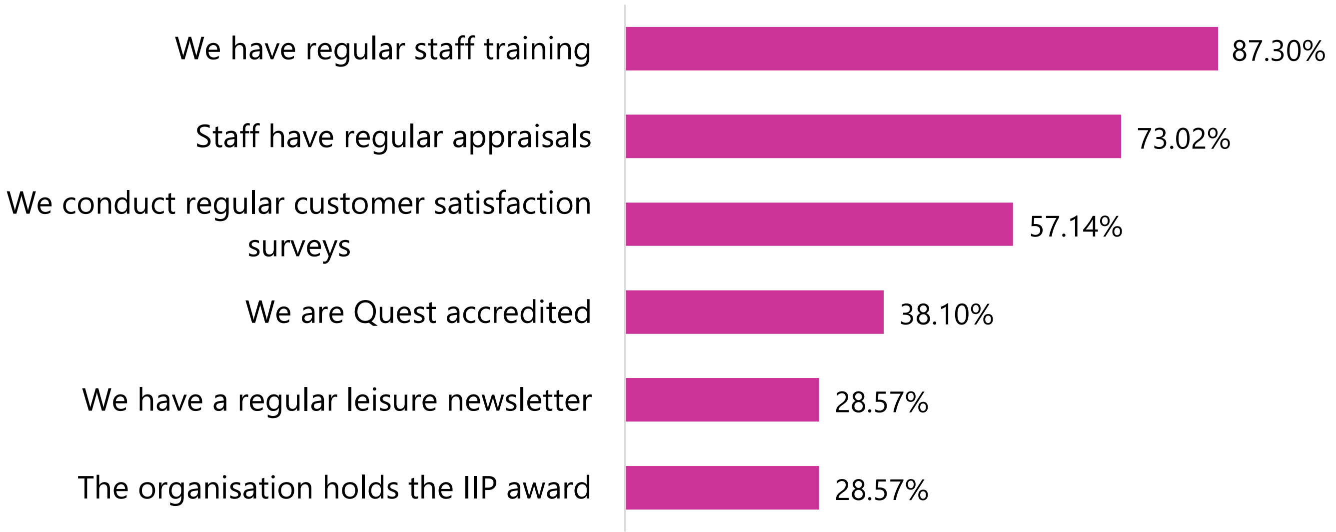
The basic current hourly rate for leisure staff before tax was an average of £10.07, a median of £9.98. With the impending increase in National Living Wage to £9.50 in April 2022, the current rates of pay are insufficient to attract or retain staff into the future, whilst making some facilities unviable.

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 (39.68%) with 38.09% answering 'slightly above average' or 'too high' and 22.22% answering 'slightly below average' or 'very low'. In 2019, the last survey pre-covid, 33.34% thought absence above average and 28.07 % below overall, suggesting an improvement during Covid or a change in people's expectations of what acceptable constitutes.

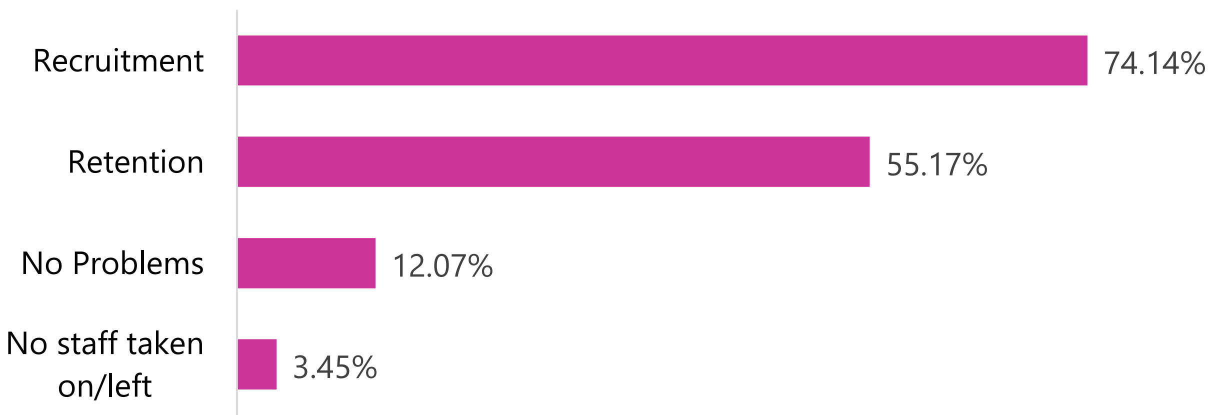
Staff Training and Quality - Please tick all that apply



On the question related to staff training and quality indicators held by responding councils, 87.30% have regular staff training, 73.02% have regular staff appraisals, 57.14% conduct regular customer satisfaction surveys, 38.10% are Quest accredited, 28.57% have a regular leisure newsletter and 28.57% hold an Investors in People award.

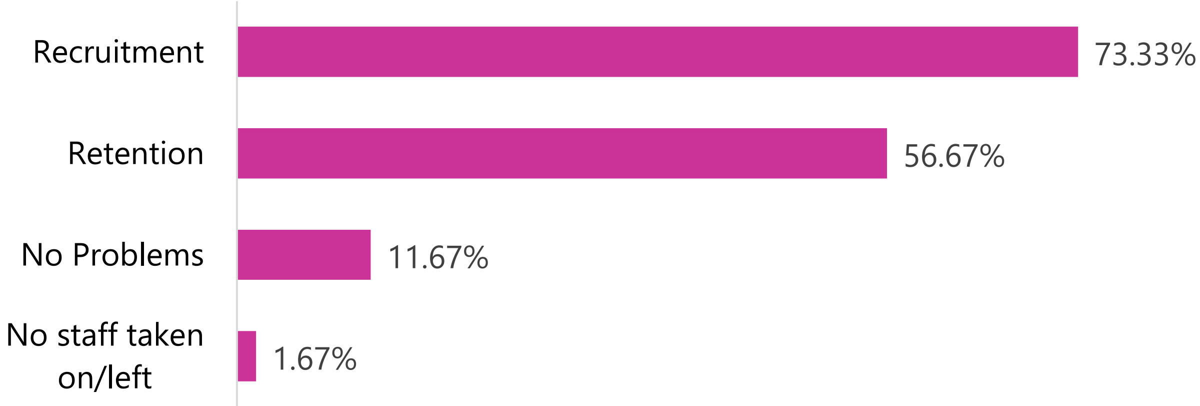
Where have you had difficulty recruiting or retaining staff (over the last 12 months)?

Lifeguards



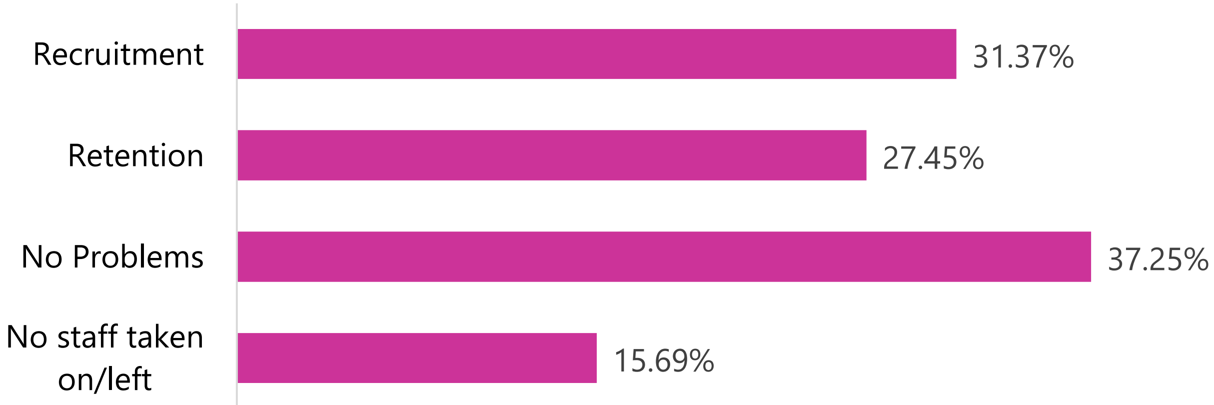
74.14% of respondents have had difficulties with recruiting lifeguards in the past 12 months and 55.17% have had issues retaining lifeguards. 12.07% reported as having no problems with the above. 3.45% said no staff had been taken on or left.

Instructors



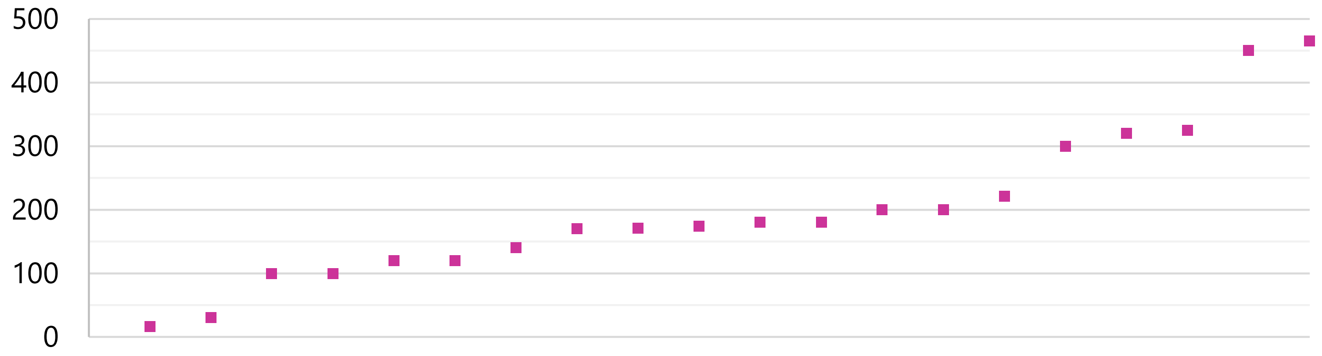
73.33% of respondents have had difficulties with recruiting instructors in the past 12 months and 56.67% have had problems with the retention of staff. 11.67% reported that they had no problems with either recruitment or retention. 1.67% said that no staff had been taken on or left.

Technical / Managerial staff



31.37% of respondents have had difficulties recruiting technical / managerial staff and 27.45% have had problems retaining them. 37.25% reported as having no problems with either of the above, and 15.69% of respondents said that no technical / managerial staff had been taken on or left.

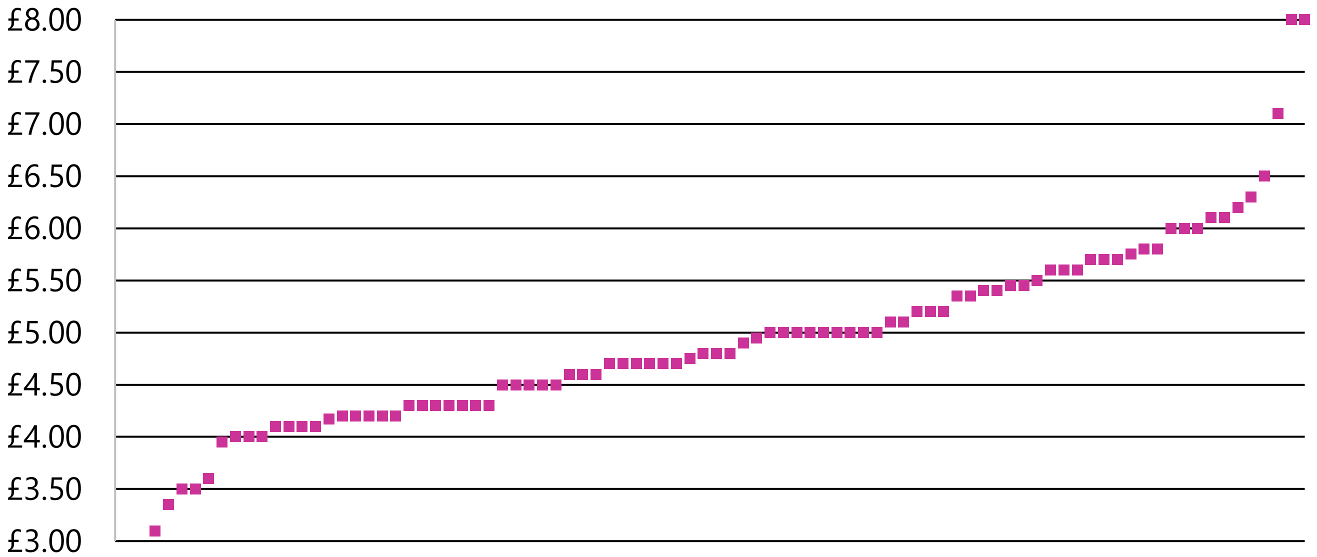
How many staff have you furloughed during the pandemic?



Respondents to the survey have furloughed between 16 and 465 staff, though many reported as having furloughed zero staff. Some authorities repurposed facilities and staff to form new service hubs and continue to do so. There was also initial uncertainty whether local authority leisure staff could use the furlough regime.

Section 5 - Charges

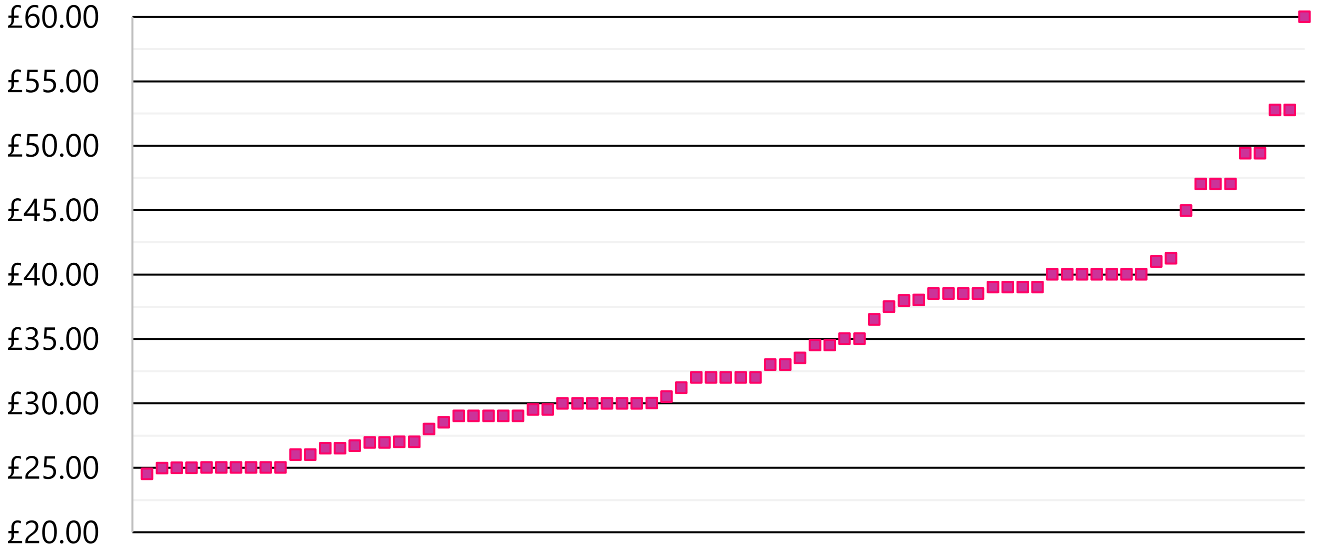
What is the charge for a single adult swim? Average price: £4.89



The charge for a single adult swim ranged from £2.40 to £8.00, with an average price of £4.89.

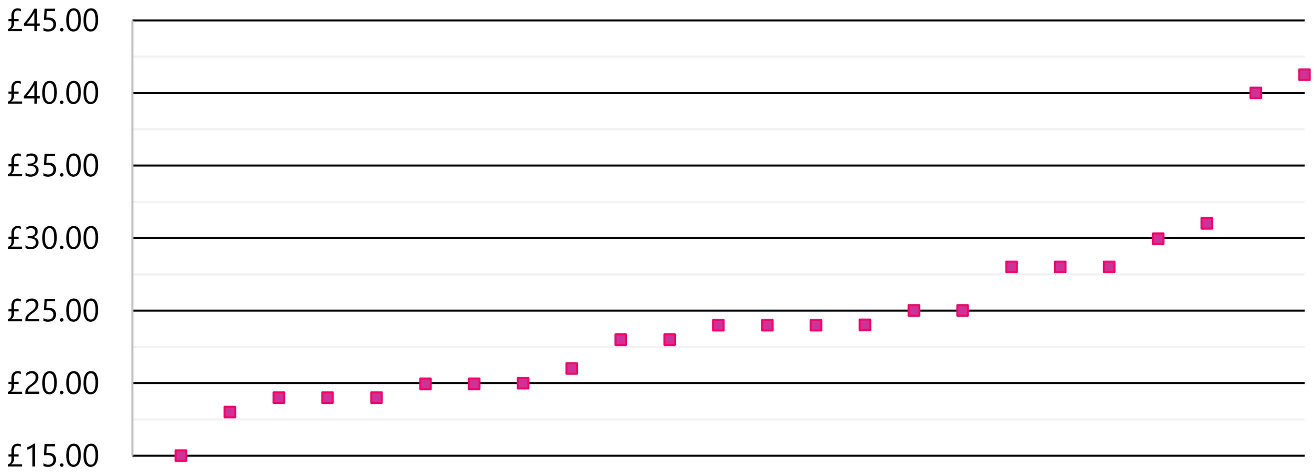
Typical monthly membership fee

Full membership **Average price: £34.08**



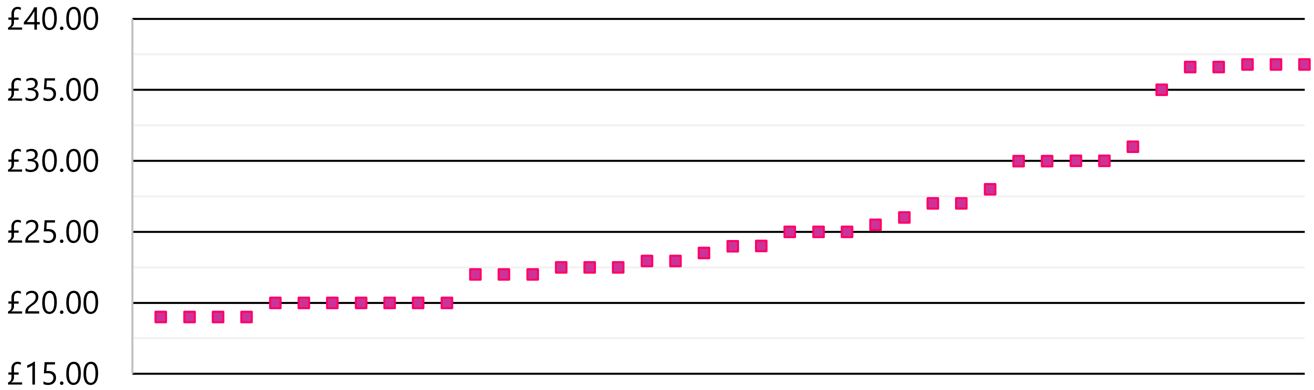
The typical monthly full membership fee ranged from £24.50 to £60.00, with an average price of £34.08.

Off-peak membership
Average price: £24.54



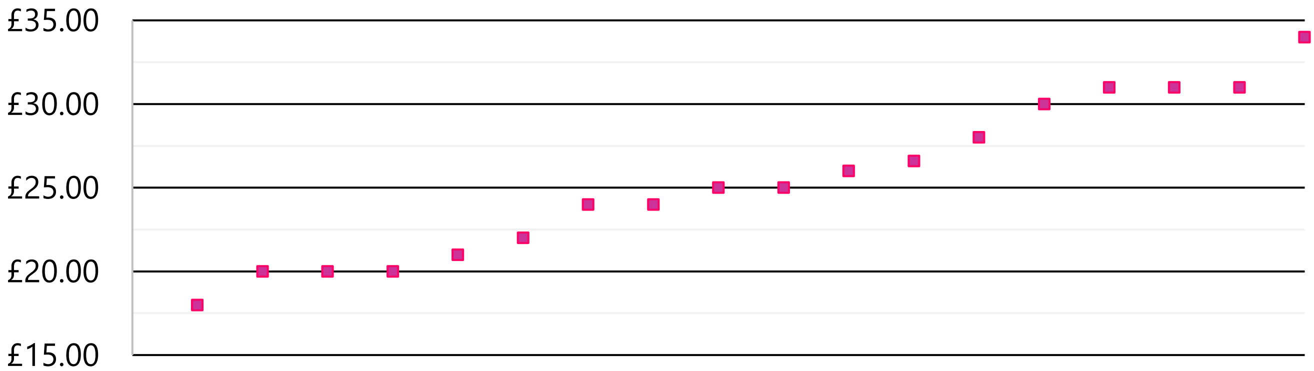
The charge for off-peak membership was not offered by as many authorities, but for those that did offer one the charge ranged from £15.00 to £41.25, with an average price of £24.54.

Swim only
Average price: £25.49



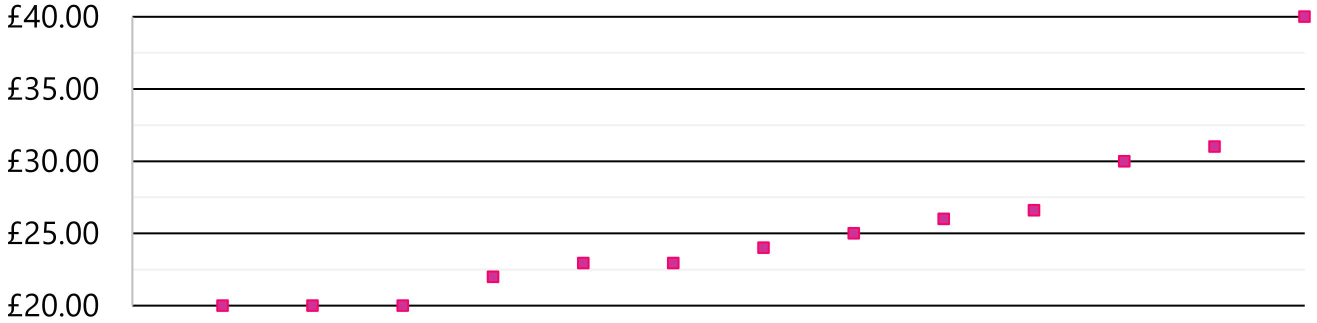
Swim only membership charges ranged from £18.99 to £36.80, with an average price of £25.49.

Gym only
Average price: £25.37



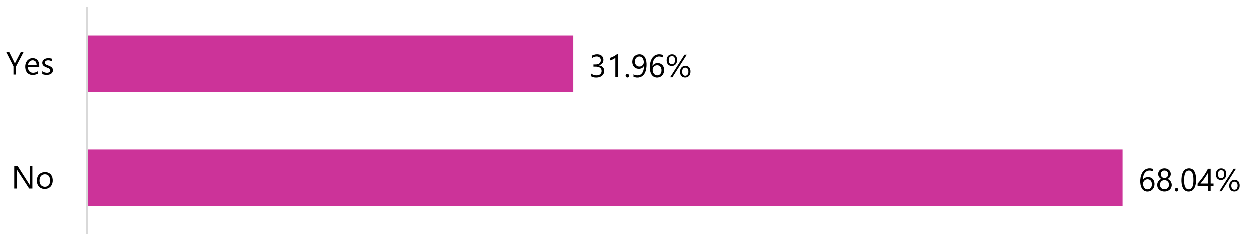
Gym only memberships ranged from £17.99 to £33.99, with an average price of £25.37.

Fitness classes
Average price: £25.42



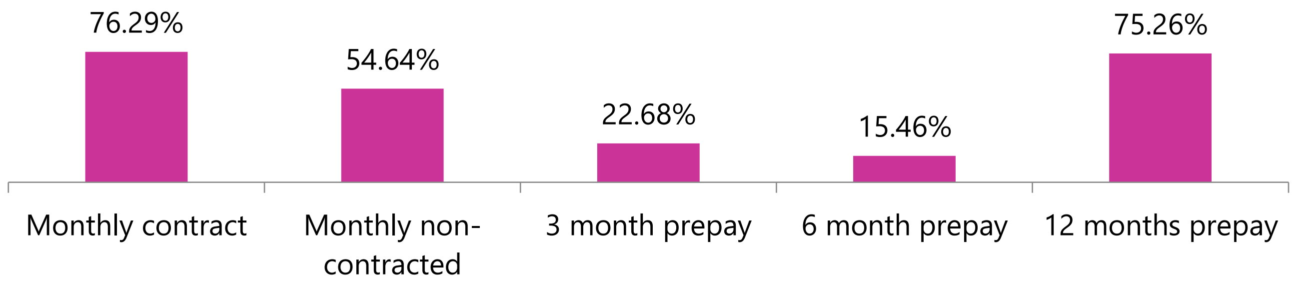
Fitness classes only memberships ranged from £20.00 to £40.00, with an average price of £25.42.

Do you have a joining fee?



31.96% of respondents reported that they did have a joining fee for their leisure facilities. The charge for this was anywhere from £5.80 up to £40.00, with between £10-20 being the most common fee, and that this fee was occasionally waived as part of special promotions.

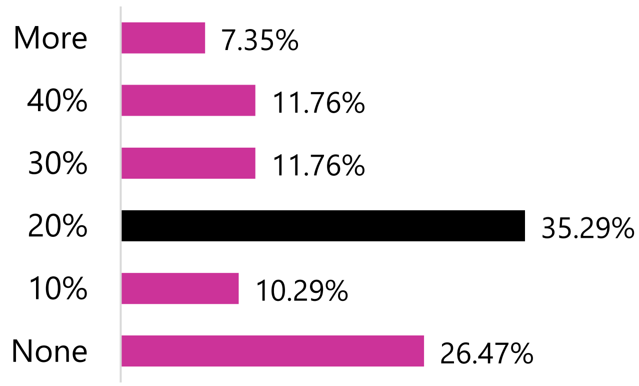
What membership payment types do you offer? (Tick all that apply)



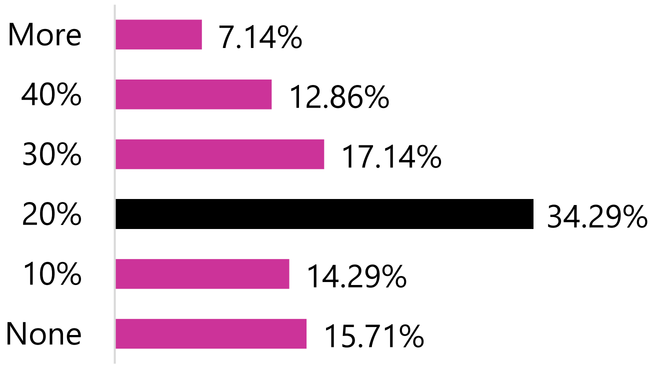
The majority of respondents offered monthly contracts (76.29%), monthly non-contracted (54.64%) and 12 months prepay (75.26%) options. Only 22.68% and 15.46% offered 3 and 6 month prepay options.

Membership package discounts offered

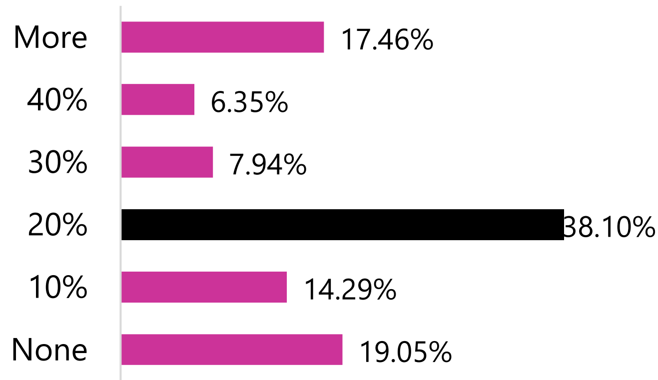
Low incomes



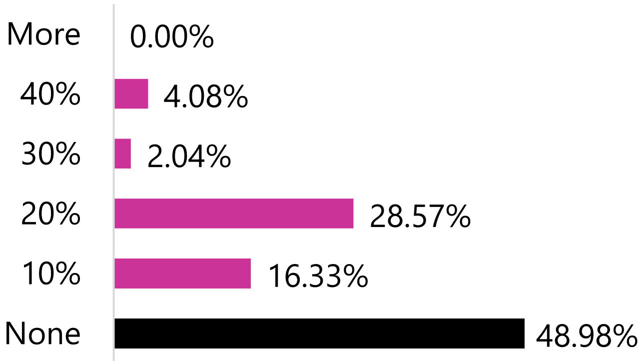
Over 65s



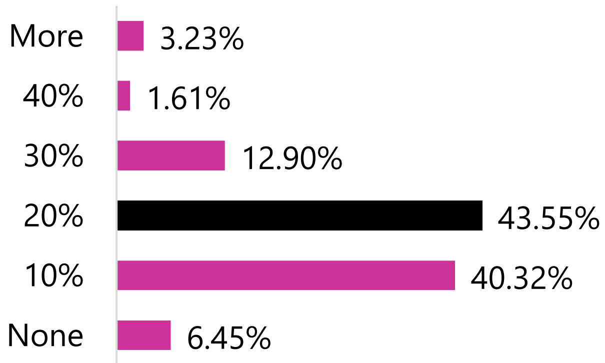
Disability



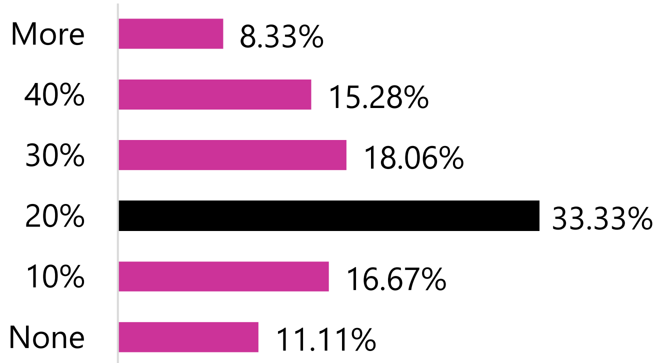
Couples



Corporate

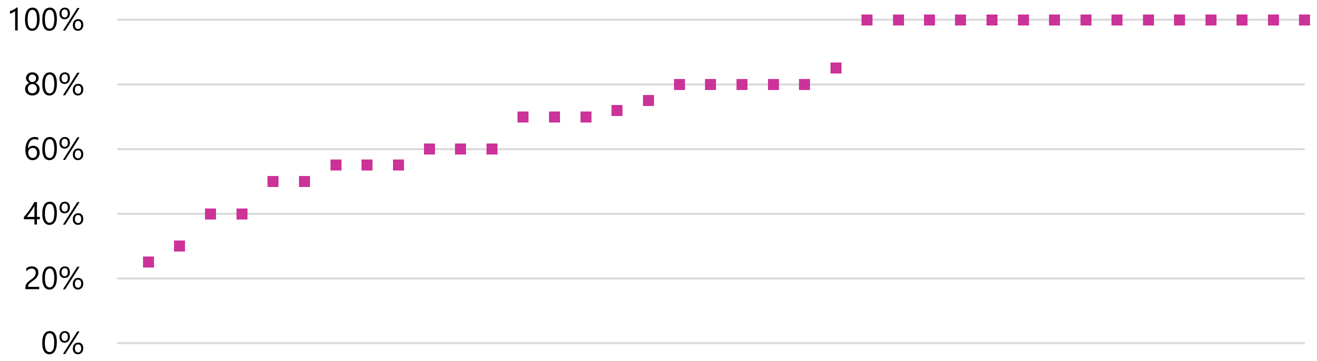


Students



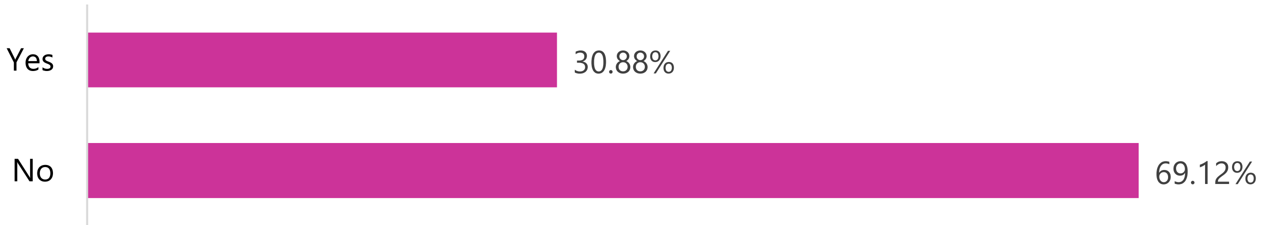
Responding councils offer a variety of membership package discounts. The most popular percentage amount for each of the categories was around 20%, except for couples' discounts which nearly half of councils did not provide.

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



The table above shows that responding councils generally have a much higher peak membership.

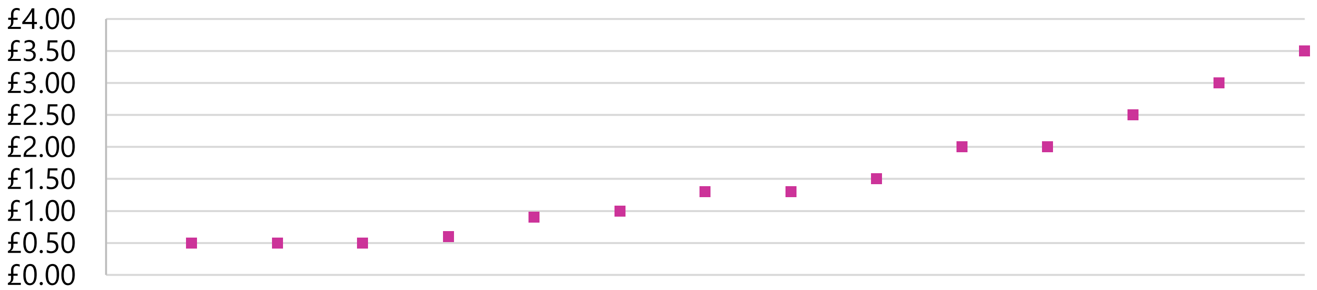
Do you charge for parking at any of your leisure centres?



The majority of respondents did not charge for parking at any of their leisure centres (69.12%).

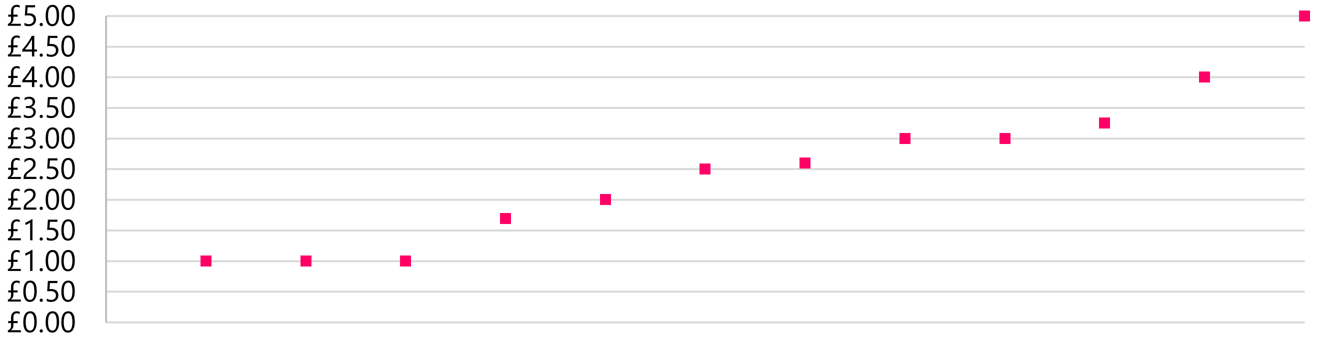
If you charge for parking, what does it cost?

One hour — Average: £1.51



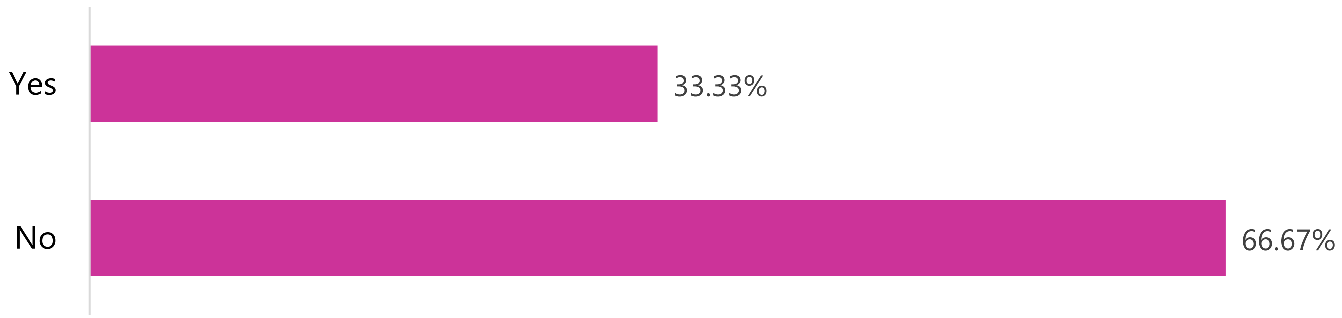
Among the minority of respondents that do charge for parking at leisure centres, the average cost for one hour was £1.51.

Two hours — Average: £2.50



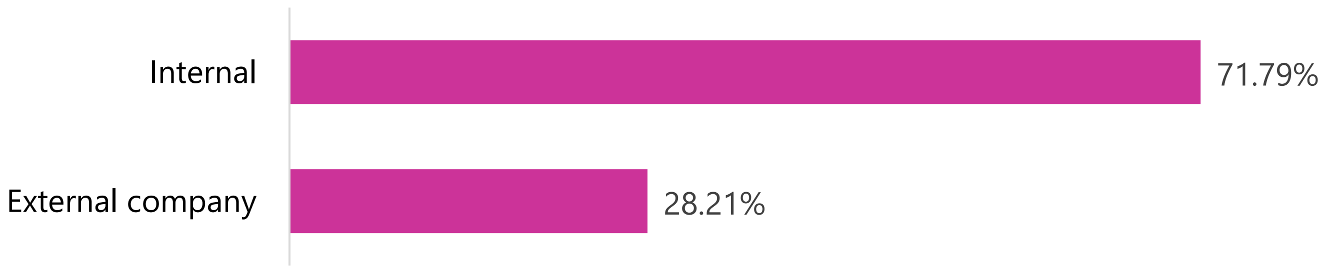
The average charge for parking for two hours was £2.50.

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



Two thirds of respondents reported that they do refund a proportion of parking charges to leisure centre users (66.67%), and the other third did not (33.33%).

Who manages the direct debit administration?



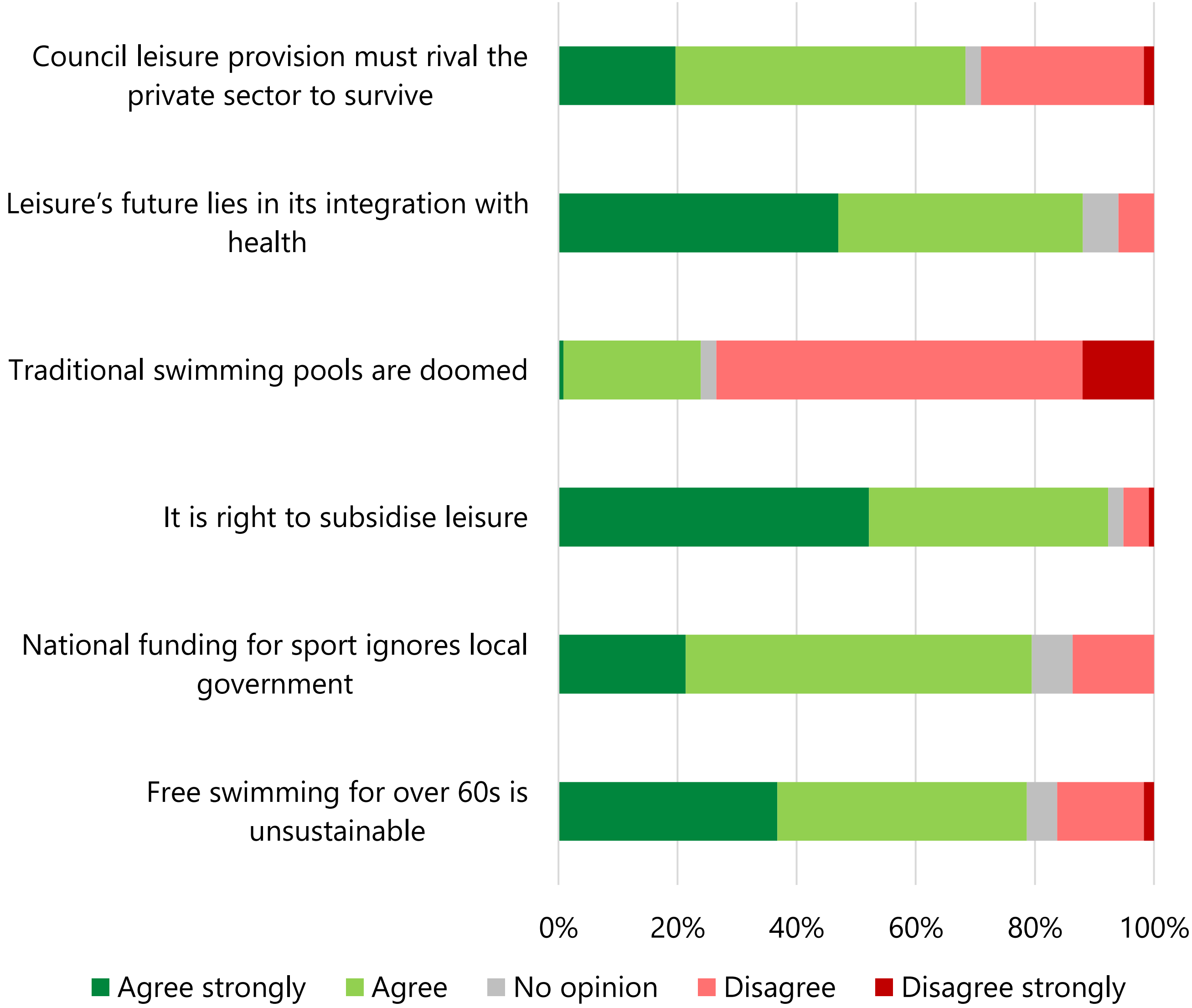
71.79% of respondents manage direct debit administration internally, and 28.21% use an external company.

Who chases debtors?

64.29% of respondents chase debtors internally, and 35.71% 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:

- We must be as good or better than the private sector where we compete, but there are other things that are uniquely ours and we should celebrate that
- I used to think we should rival the private sector but the pandemic has changed my view and we need to be more focused on getting our communities active
- We must not ignore grass roots sports development and the creation and development of elite sports players

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:

- Online exercise classes and using digital platforms
- Targeted delivery of 'hard to reach' groups
- Swimming lessons
- Fitness and gym membership
- Commissioned public health interventions
- COVID recovery (e.g., long COVID)
- Support for weight loss
- Community connecting services
- Non-traditional fitness classes
- Gymnastics and cycling

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

Areas of future decreases identified by survey respondents included:

- Indoor sports hall activities and sports outreach activities
- Subsidised activities for the retired / disabled
- Traditional gym usage
- Café closures or with reduced opening hours
- Reductions in staffing in favour of automated booking and payments
- Personal training
- Areas running at large deficits such as football and swimming
- Older, unused and poorly maintained sites

Local Authority Sports and Leisure Services

State of the Market 2021

APSE Comment

During 2021, APSE conducted an in-depth study, along with CLOA and the LGA, into local authority leisure and physical activity. The final report was released in the Autumn with a Parliamentary launch. The final report "Securing the future of public sport and leisure facilities" may be downloaded here.

The study probes the challenges and risks facing public sport and leisure services which include:

- Financial failure
- Closure of facilities
- A need for Capital Investment

Recommendations to Government are made in regard to future funding and support, along with suggestions to the future direction and target of local authority interventions.

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
- Climate Change and Renewable Energy Network

- Environmental Health
- Highways and Street Lighting
- Housing Construction and Building Maintenance
- Local Authorities Commercialisation, Income and Trading Network
- Parks, Horticulture and Grounds Maintenance
- Sports and Leisure Management
- Vehicle Maintenance and Transport
- Waste Management, Refuse Collection and Street Cleansing