apse membership resources

State of the Market Survey 2022

Local Authority Sports and Leisure Services

December 2022
22-48

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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Percentage expecting the workload of the leisure section to increase over the next 12 months	**88.52%**
Staffing	
Average basic current hourly rate for leisure staff (before tax)	**£10.21**
% of respondents who say staff absence levels are 'slightly above average' or 'too high'	**41.67%**
% of respondents with difficulty recruiting lifeguards	**90.91%**
% of respondents with difficulty recruiting instructors	**82.35%**
% of respondents with difficulty recruiting technical / managerial staff	**53.57%**
Finance and charges	
% expecting the leisure budget to either decrease or decrease substantially	**49.02%**
Average charge for a single adult swim	**£5.07**
Average typical monthly full membership fee	**£35.75**
% of respondents with a joining fee for facilities	**45.00%**
% of respondents who charge for parking at any of their leisure facilities	**36.11%**
Service delivery	
% of respondents who have established any new pitches over the last 2 years	**18.92%**
% of respondents who answered 'some subsidy required' in the financial cost of pitches to the Council	**54.84%**
Expected changes over the next year	
% of respondents expecting reductions in Council subsidy	**34.88%**
% of respondents expecting reductions in management	**23.26%**
% of respondents expecting reduced opening hours	**58.14%**

Sports and Leisure

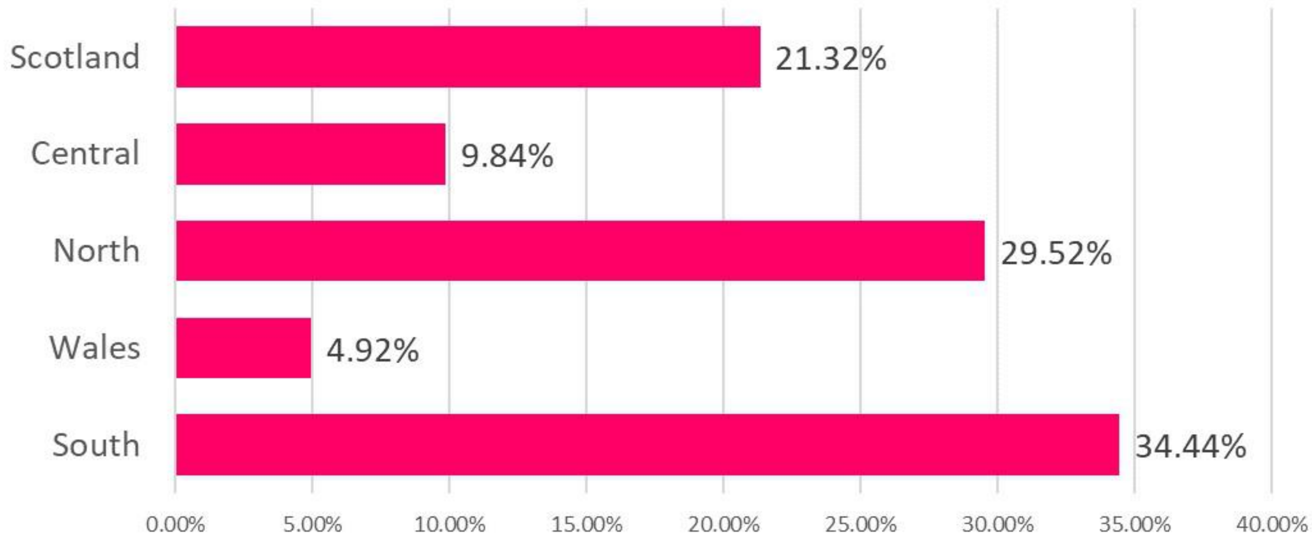
State of the Market 2022

APSE conducted an online survey over the summer of 2022 and reported initial results at the APSE Sports and Leisure Seminar in November 2022. This report shares the triangulated findings of that work. 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.

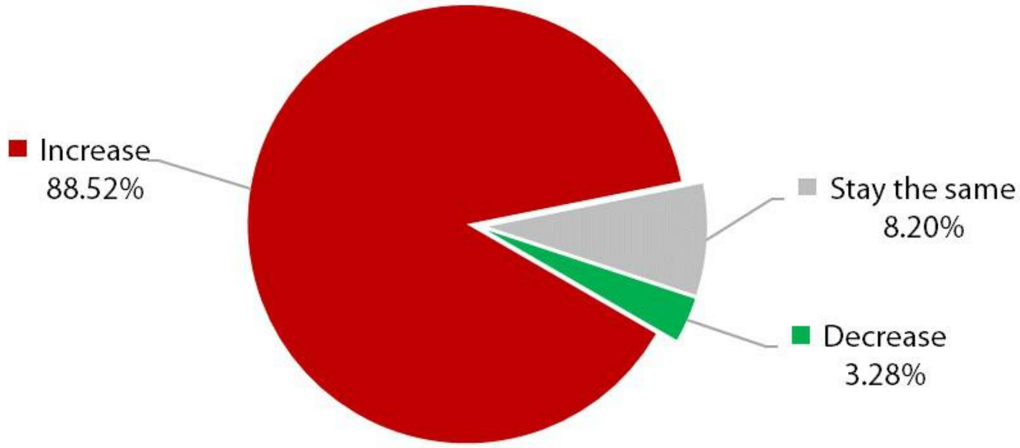
None of the questions were mandatory, so the total amount of responses differs from question to question. Individual details of respondents have been kept confidential. Results of the survey should be treated as a snapshot of current opinions of those working in sports and leisure services rather than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

Survey respondents by location:



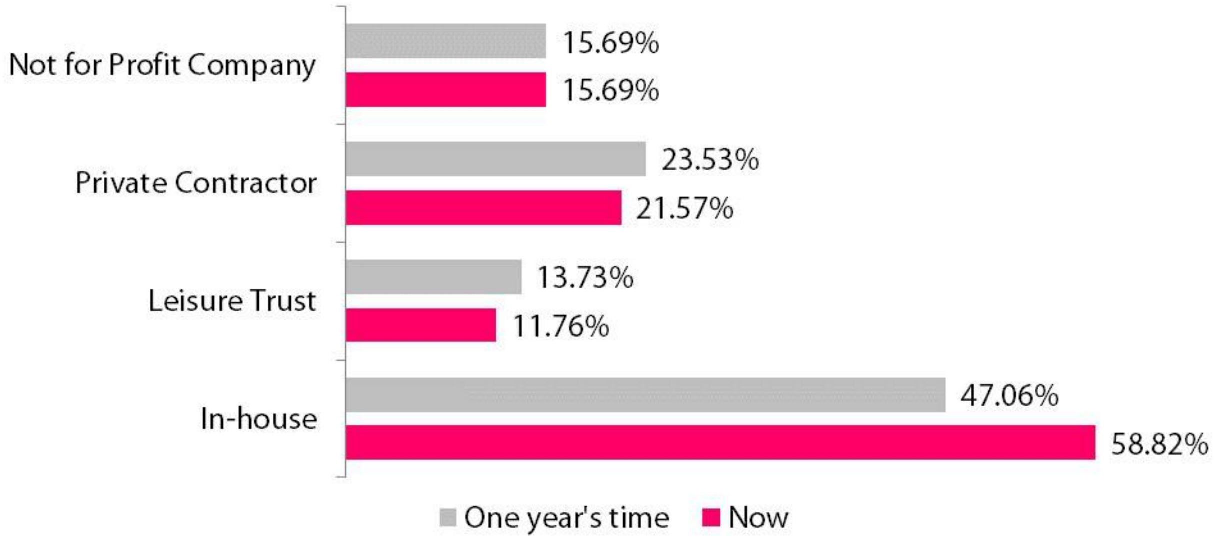
Section 1 – The Service

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



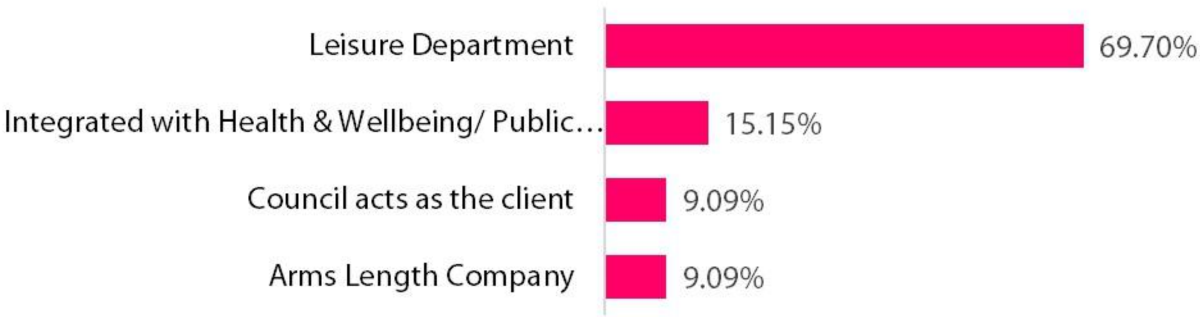
Respondents to the survey largely expect that the workload of the leisure section will increase over the next 12 months (88.52%) or stay the same (8.20%). Only 2 respondents (3.28%) felt that it would decrease.

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



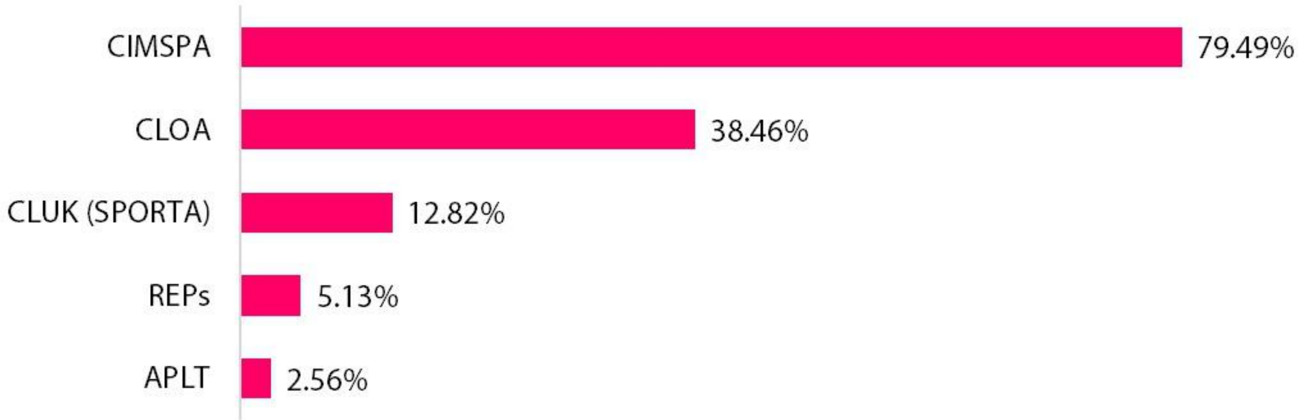
While the majority of respondents expected their service to be managed the same way in 12 months' time, 11.76% less expected to be managed in-house, 1.96% more expected to be managed by a leisure trust and 1.96% more expected to be managed by a private contractor.

If in-house, which of the following apply?



69.7% of in-house respondents are leisure departments, 15.15% are integrated with Health & Wellbeing / Public Health, 9.09% have arrangements where the council acts as the client, and 9.09% are an Arms-Length Company.

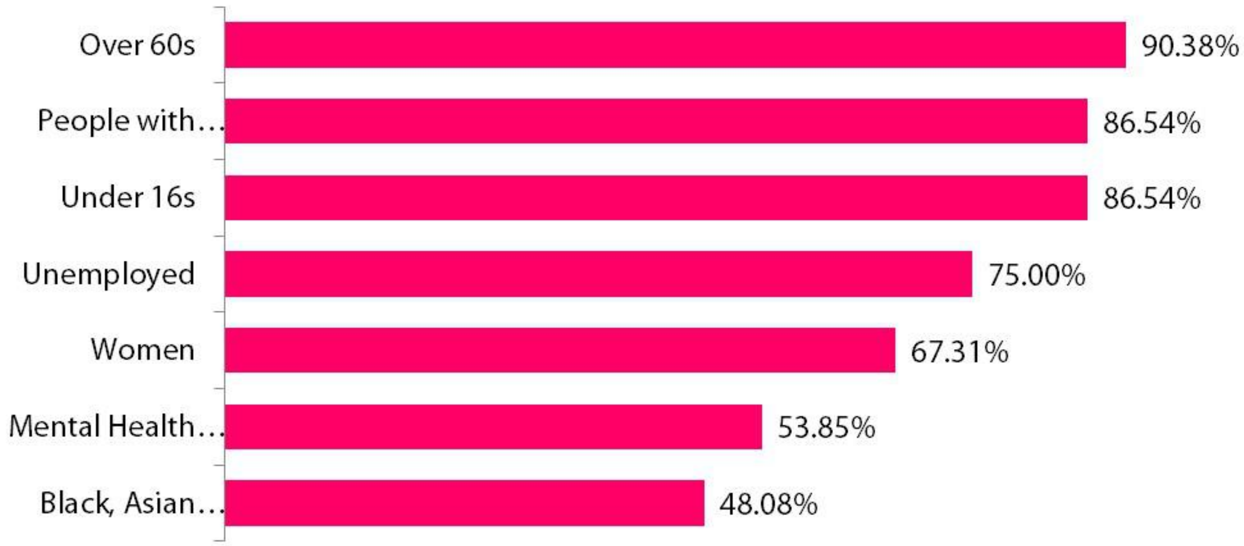
Are you a member of any industry governing bodies?
(Tick all that apply)



79.49% of respondents to the survey are a member of the Chartered Institute for the Management of Sport and Physical Activity (CIMSPA), 38.46% are members of the Chief Cultural & Leisure Officers Association (CLOA), 12.82% are members of Community Leisure UK (CLUK (SPORTA)), 15.71% are members of the Register of Exercise Professionals (REPs) and 2.56% are members of APLT.

Respondents also identified being members of UK Active and Swim England.

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

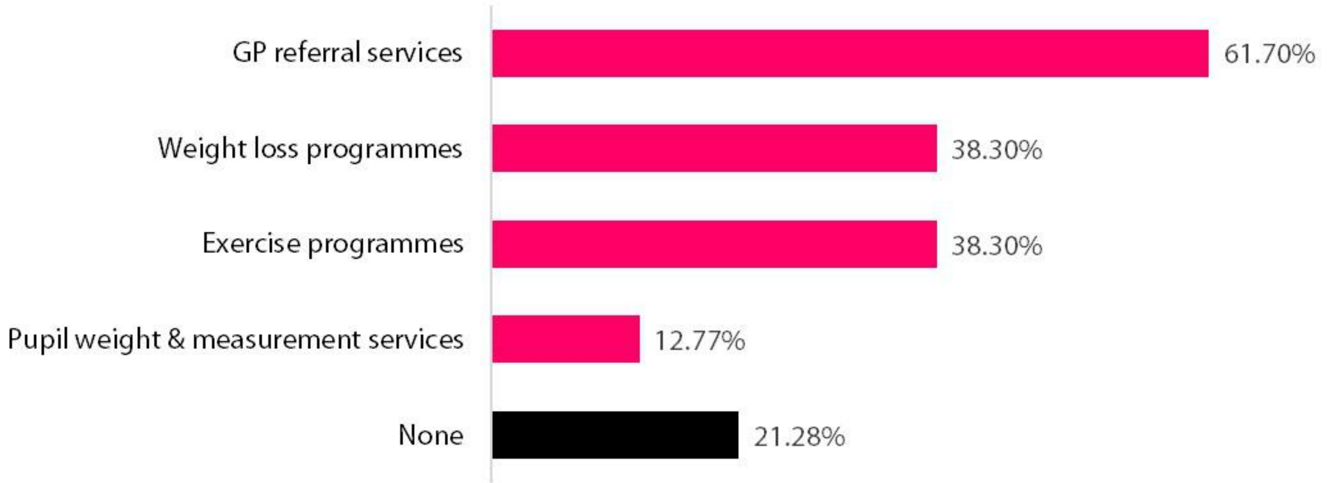


90.38% of respondents actively encourage participation from over 60s; participation is also encouraged from people with disabilities (86.54%), under 16s (86.54%), the unemployed (75.00%), women (67.31%), mental health support (53.85%) and the black, Asian and minority ethnic communities (48.08%).

Respondents also actively encouraged provision from:

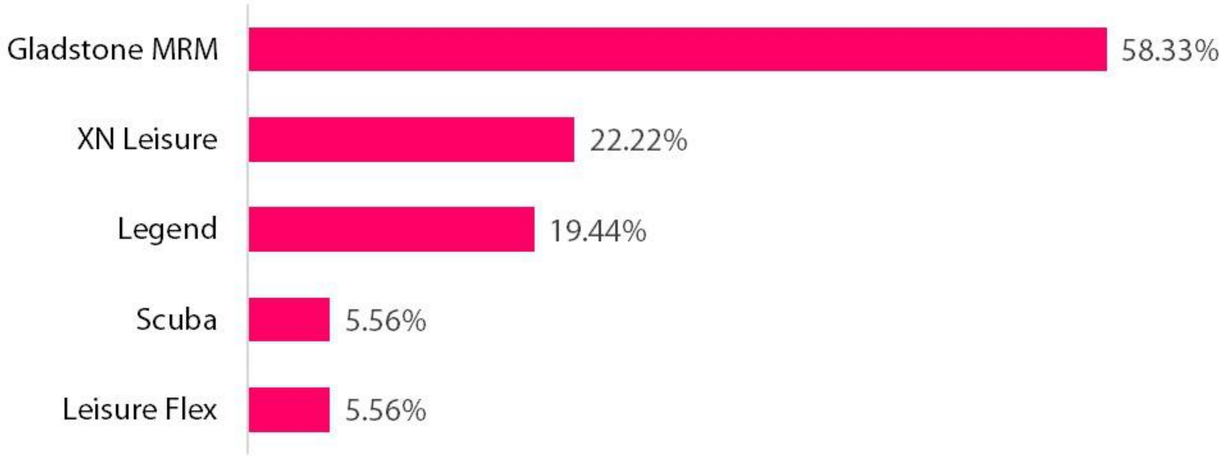
- People with health conditions
- Refugees
- LGBTQ+
- Inactive people
- People from identified areas of deprivation
- People undergoing cardiac rehabilitation
- National sportspeople

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



61.70% of respondents have been commissioned by their local Health Board to provide GP referral services, 38.30% to provide weight loss programmes, 38.30% to provide exercise programmes and 12.77% to provide pupil weight and measurement services. 21.28% have not been commissioned to provide any of the above services. Respondents have also been commissioned to provide support for long term COVID-19, general physical activity, escaping back and joint pain, pre-minor surgery referrals and smoking cessation.

Which software package do you use for managing leisure?

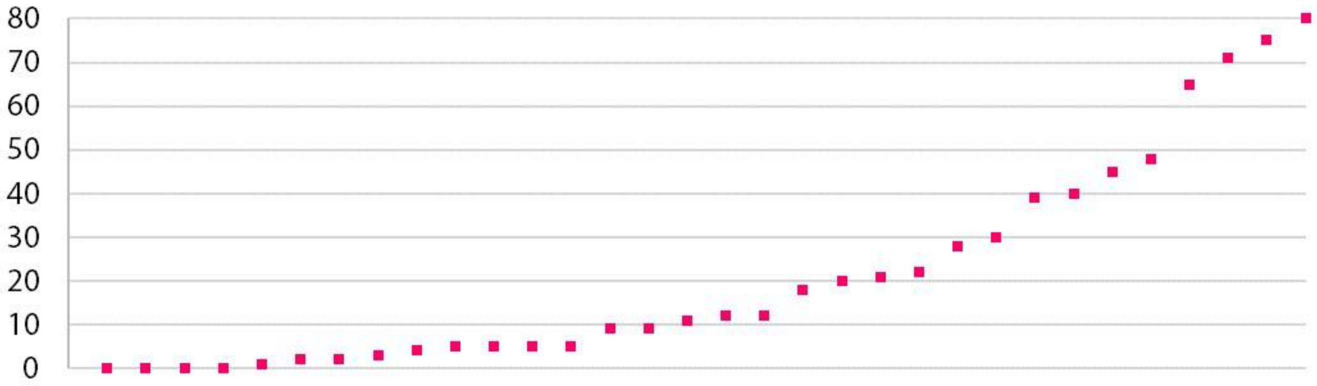


The most popular software package for managing leisure among respondents is Gladstone MRM (58.33%) followed by XN Leisure (22.22%), Legend (19.44%), Scuba (5.56%) and Leisure Flex (5.56%). Other packages in use included Flow and various in-house developed software.

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

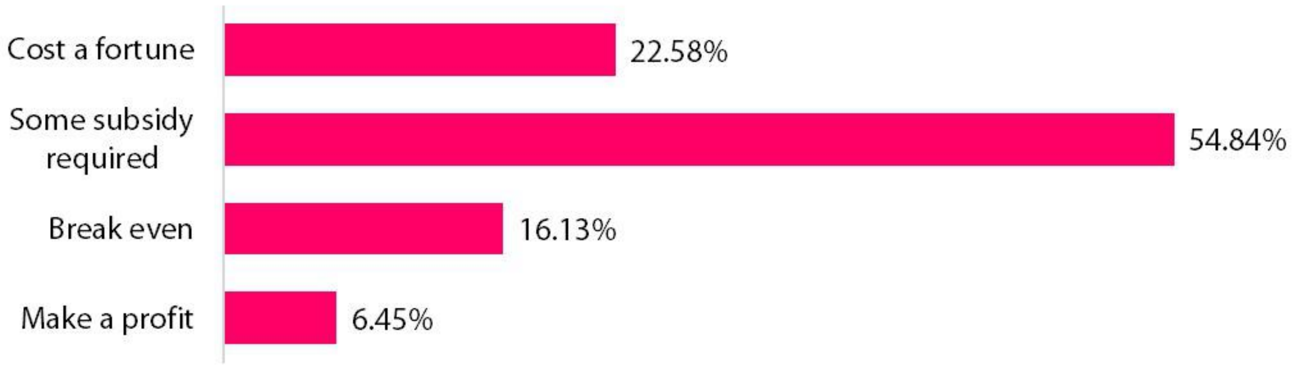
The majority of respondents have not established any new pitches over the last 2 years (81.08%).

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



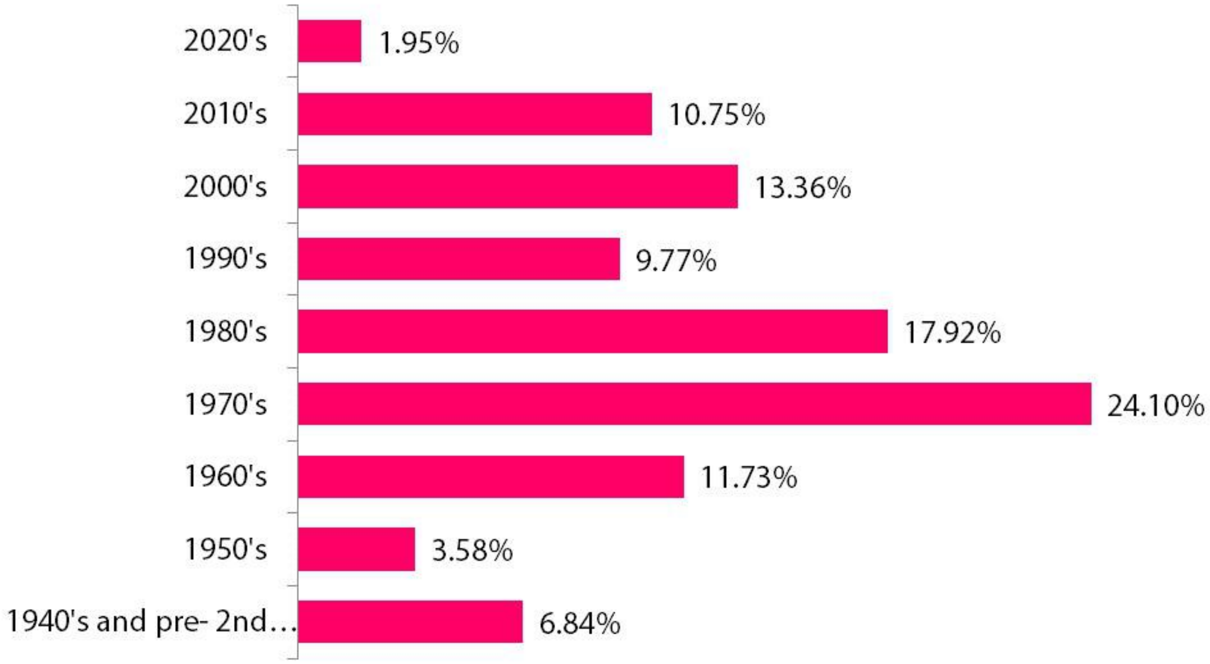
Survey respondents maintained anywhere from 1 pitch up to 80 sports pitches.

What is the financial cost of pitches to the Council?



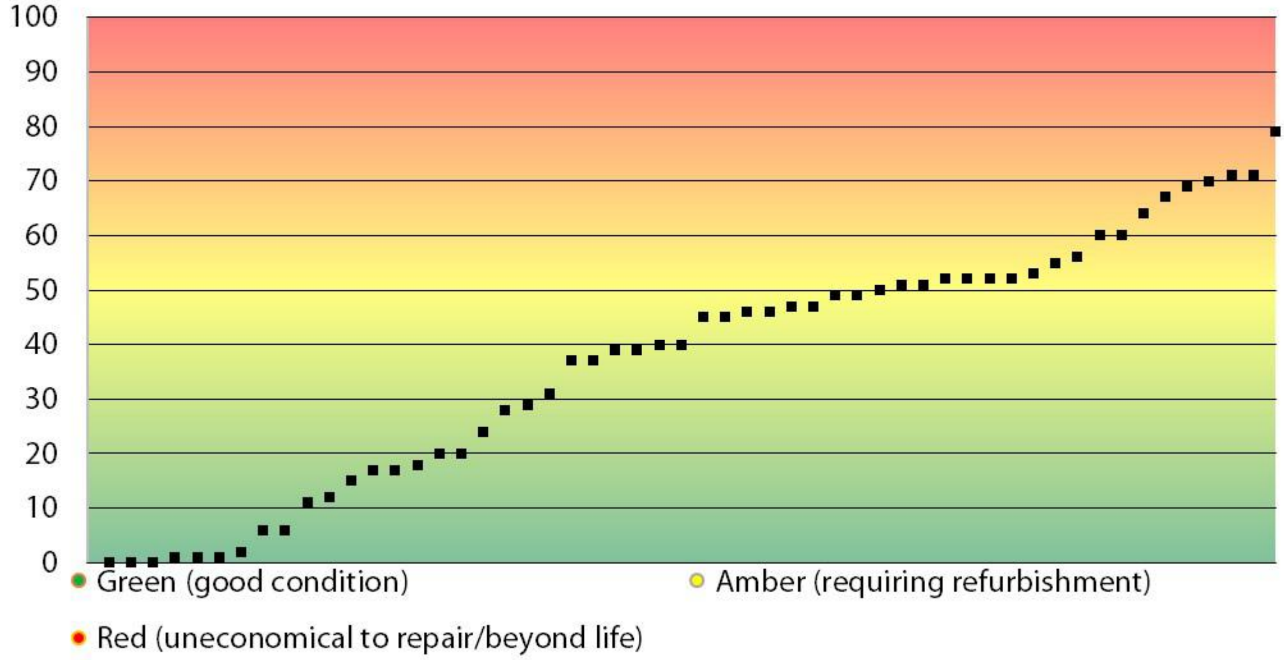
Most of the respondents reported that some subsidy was required towards the cost of pitches to the Council (54.84%). Only 6.45% said that their pitches made a profit.

When were your leisure facilities first built?



Most leisure facilities were built in the 1970s (24.10%) and 1980s (17.92%). So around 46% of facilities were built before 1980 and many have not aged well, especially when more modern environmental considerations like energy efficiency are included. Significant investment will be needed to keep existing facilities open as seen in the following graph.

Overall, how would you rate your average facility?

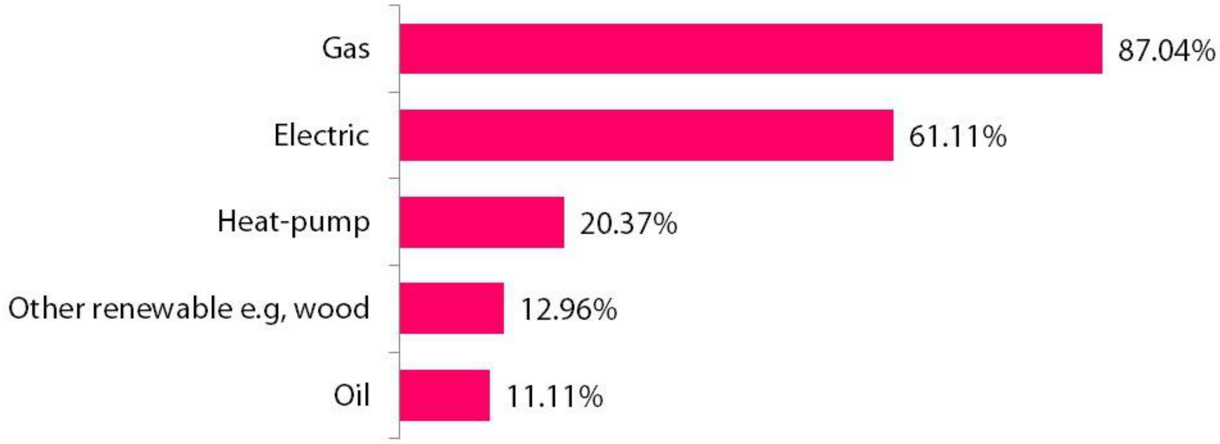


Respondents were asked to rate their average facility with green (0) indicating they were in good condition, amber (50) indicating they required refurbishment and red (100) indicating that they were uneconomical to repair and beyond life. The average response was 37.04 with a median of 42.5, indicating that the average facility was in reasonable condition but close to requiring refurbishment.

How many facilities do you have of each type?

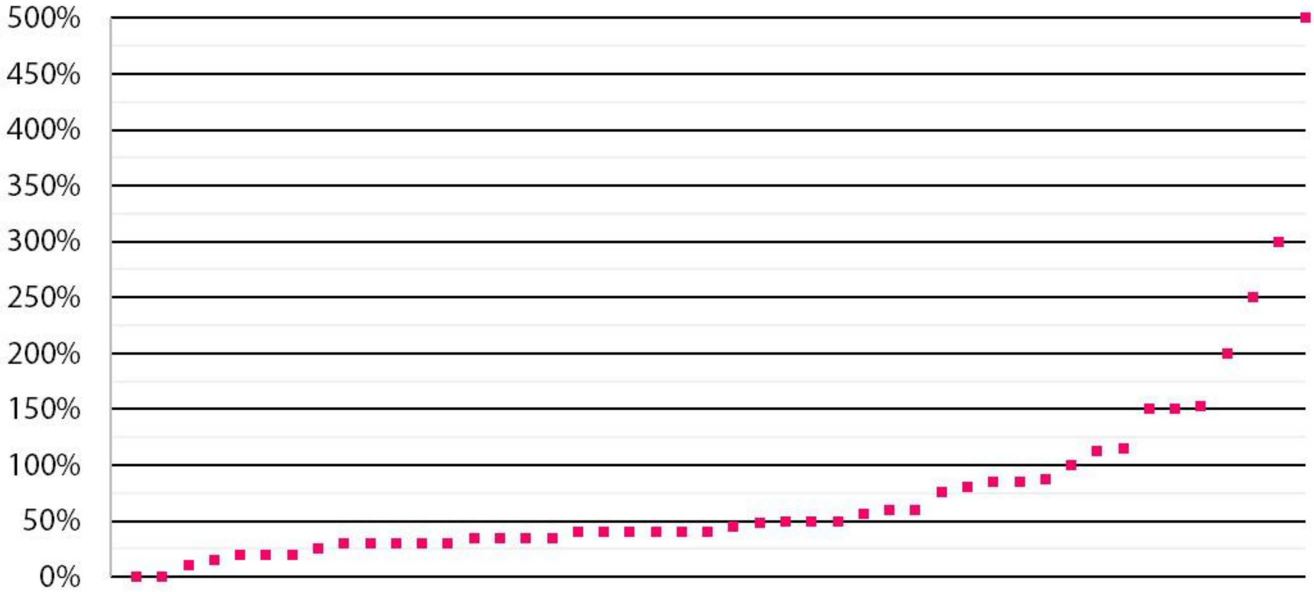
Respondents had between 1 and 5 gym only sites, 1 or 2 swimming only sites and between 1 and 9 combined gym and swimming sites.

How are your facilities heated?



The most common methods of heating facilities were gas (87.04%) and electric heating (61.11%).

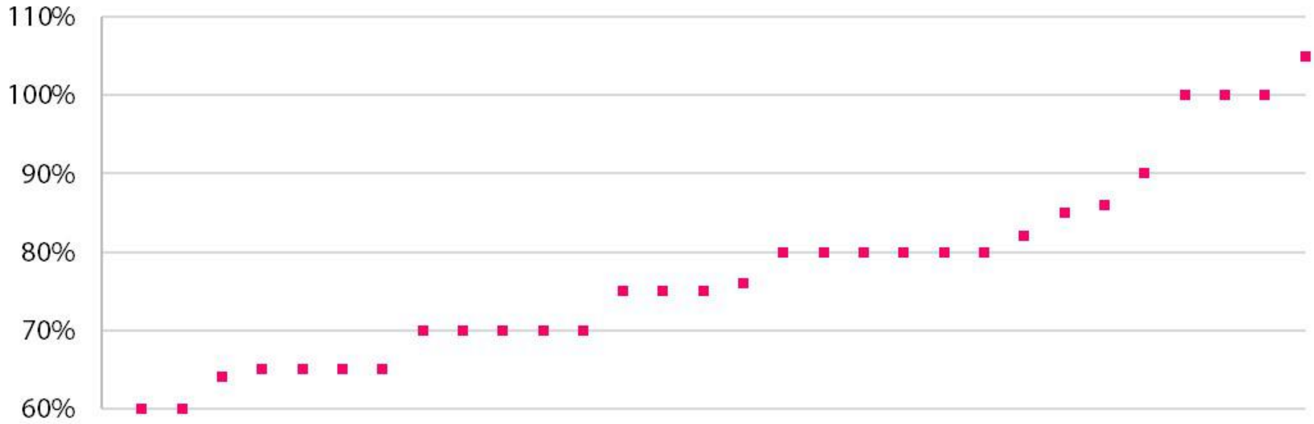
What has been the increase in energy cost over the last year?



The estimated average increase in energy falls between 10% and 500% with an average figure of 76% and a median of 43%.

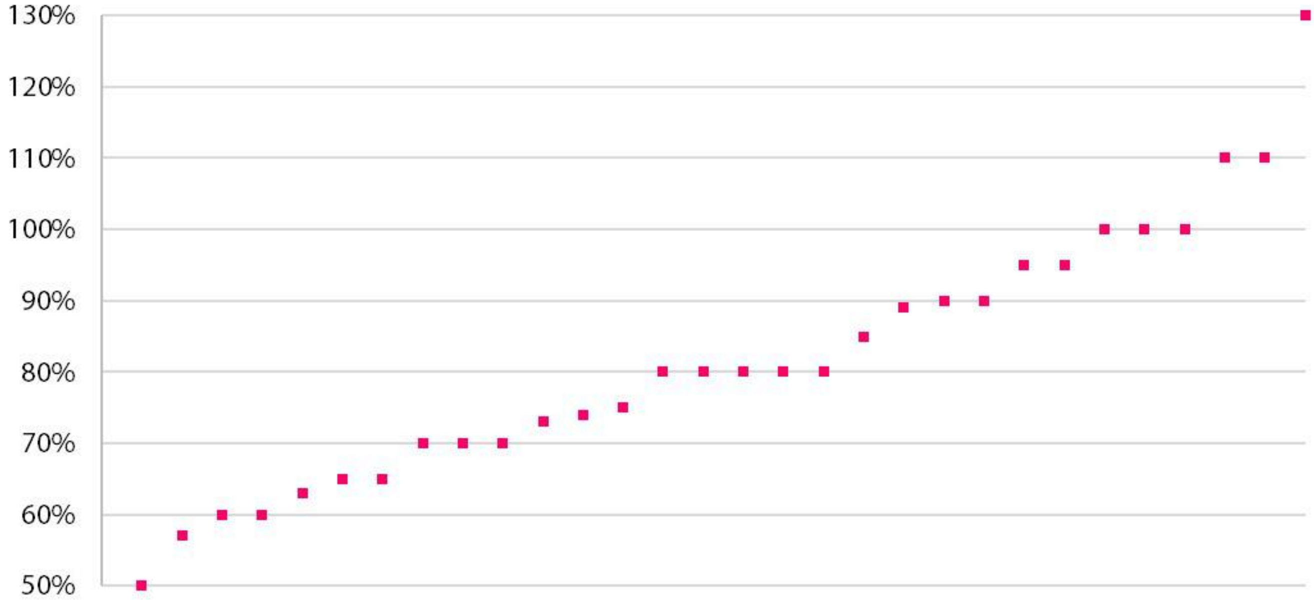
What is your estimate of the number of Gym and Swim attendances compared to pre-COVID (e.g. 70%)?

Gym attendance



The lowest reported attendance figure was 60% and the highest was 105%, with one authority reporting higher attendance than before COVID-19. The average gym attendance is 77.43%.

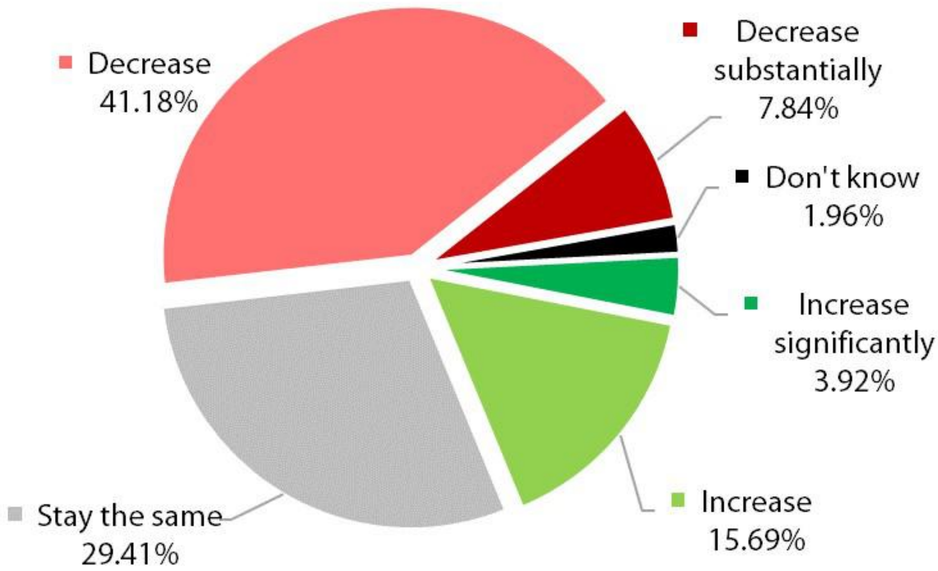
Swimming attendance



The lowest reported attendance figure was 50% and the highest was 130%. Three authorities reported higher attendance than before COVID-19. The average swimming attendance is 81.53%.

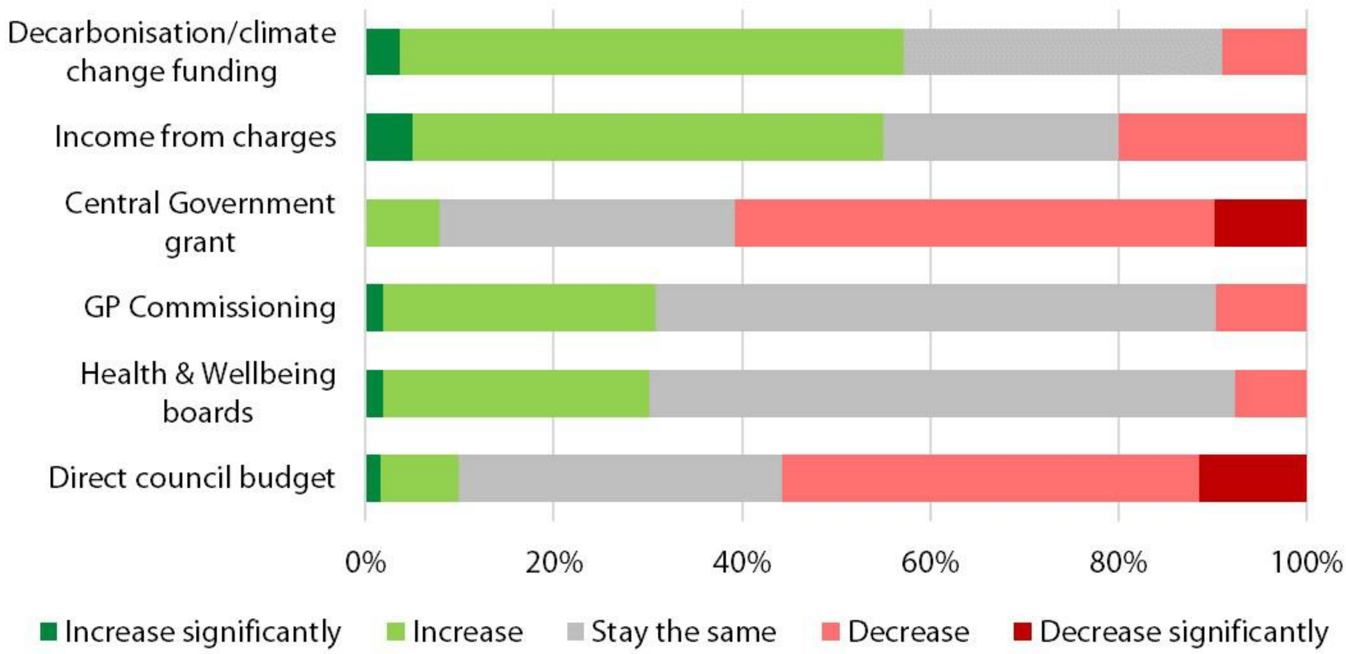
Section 2 - Funding

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



The majority of respondents expect the leisure budget to decrease (41.18%) or decrease substantially (7.84%). 29.41% expect the budget to stay the same, 15.69% expect the budget to increase or increase significantly (3.92%).

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



- 57.14% of respondents expect that income from decarbonisation / climate change funding, 33.93% expect it to stay the same and 8.93% expect it to decrease.

- 55.00% of respondents expect that income from charges will increase, 25% expect it will stay the same and 20.00% expect it to decrease.

- 6.56% of respondents expect the Central Government grant to increase, 26.23% expect it to stay the same, and 50.82% expect it to decrease.

- 31.37% expect that funding from GP Commissioning will increase, 60.78% think it will stay the same, and 9.80% expect this to decrease.

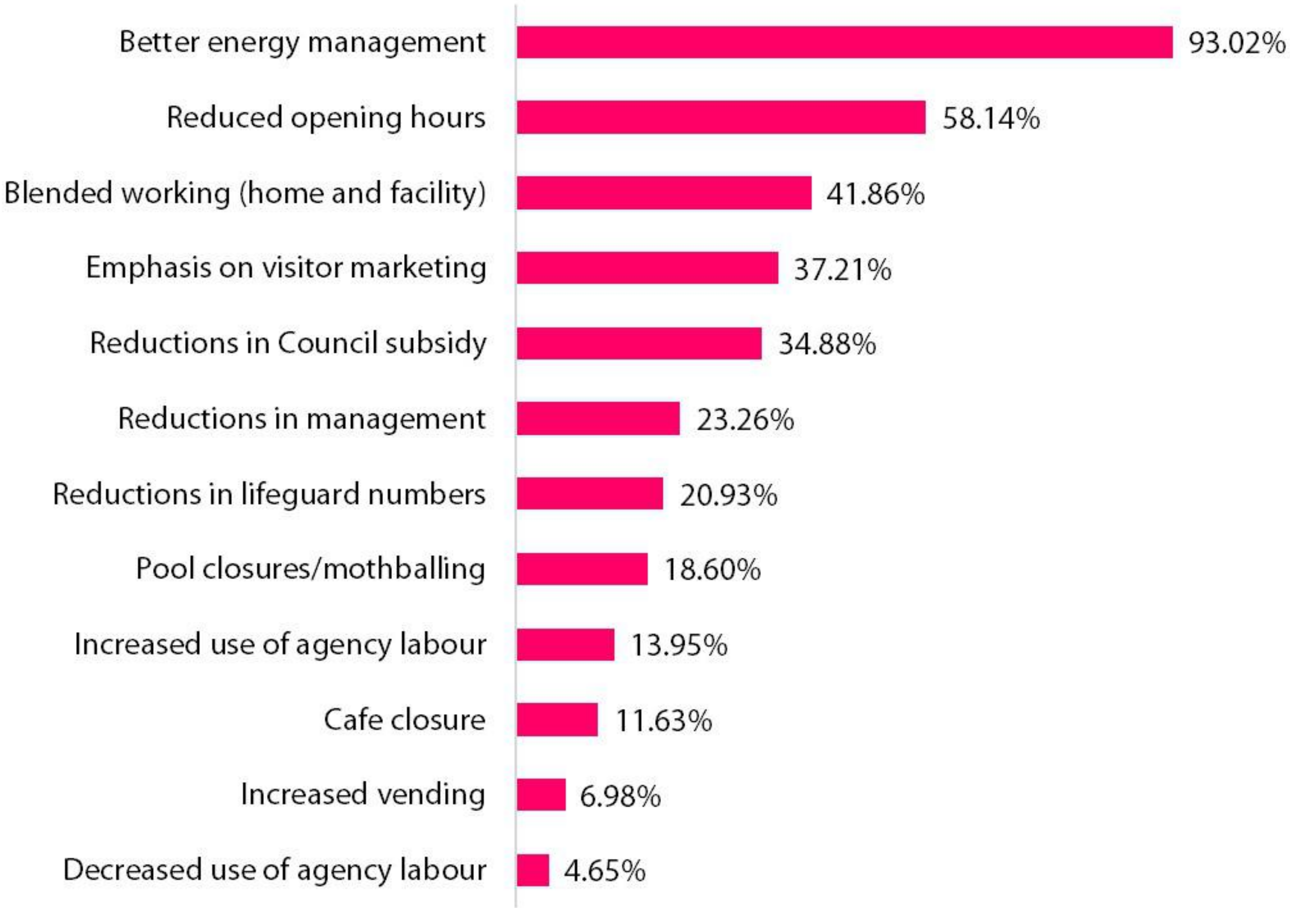
- 30.19% of respondents expect that funding from Health & Wellbeing boards will increase, 62.26% think it will stay the same, and 7.55% think it will decrease.

- 9.84% expect their funding from direct council budget to increase, 34.43% expect this to stay the same and 55.74% expect their direct council budget to decrease.

Funding is going to a fundamental issue into the foreseeable future. The fallout from Covid on facility user numbers and the recent rises in energy and salaries leaves many seeking alternative income streams. Integration with Health may provide one such option and is being actively pursued by several authorities. Swimming pools are especially vulnerable and any forced closures will have very detrimental effects of swimming lessons and the ability of younger people to swim.

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?



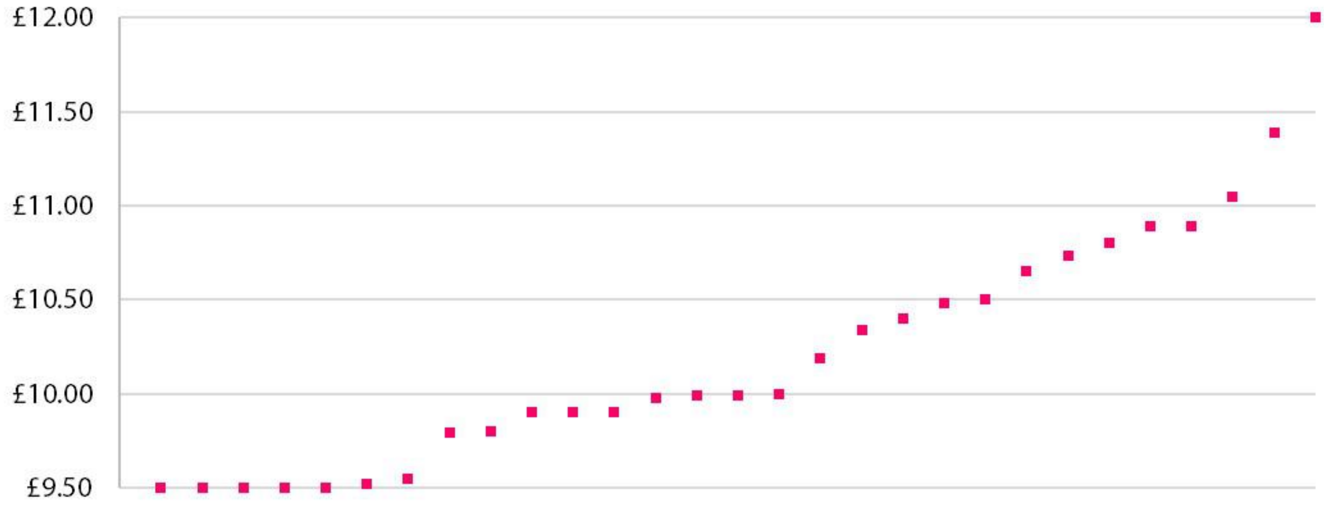
The majority of respondents expect better energy management (93.02%) and 58.14% expect to have reduced opening hours. Others had also implemented blended working (41.86%), emphasis on visitor marketing (37.21%) and reductions in Council subsidy (34.88%).

Other changes expected from individual respondents include:

- Increased income targets
- Increased self-service for customers (leading to potential reductions in staffing hours)
- Moving away from traditional leisure and competition within the fitness sector

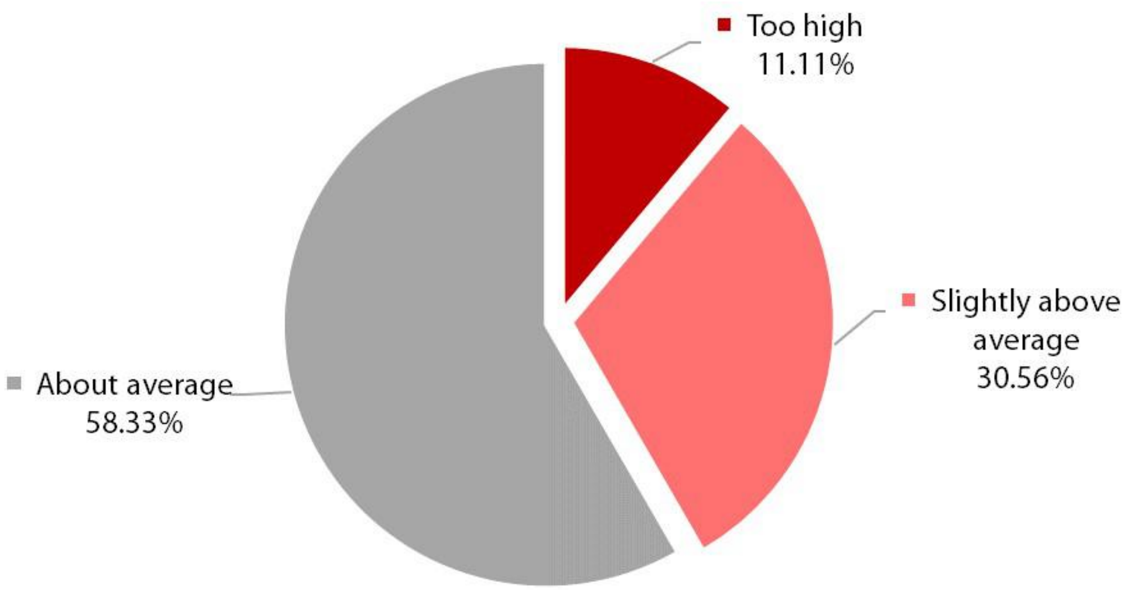
Section 4 – Staffing

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 £10.21, a median of £9.99 with a low of £9.50 and a high of £12.00. This will shift in the coming year with the 2022-2023 NJC settlement which weights a higher percentage increase to lower paid staff.

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 (58.33%) with 30.56% answering ‘slightly above average’ and 11.11% answering ‘too high’. No respondents felt that it was ‘slightly below average’ or ‘very low’.

Staff Training and Quality - Please tick all that apply

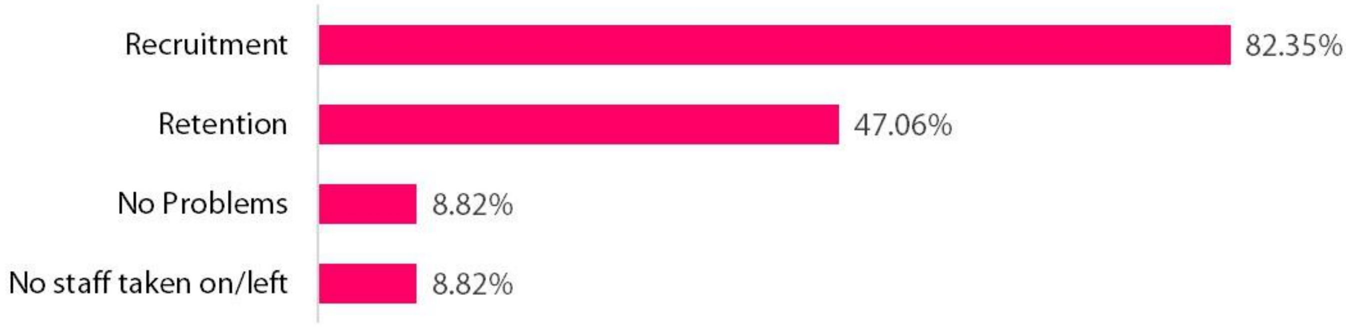
On the question related to staff training and quality indicators held by responding councils, 86.11% have regular staff training, 77.78% have regular staff appraisals, 72.22% conduct regular customer satisfaction surveys, 52.78% are Quest accredited, 33.33% have a regular leisure newsletter and 30.56% hold an Investors in People award.

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

Lifeguards

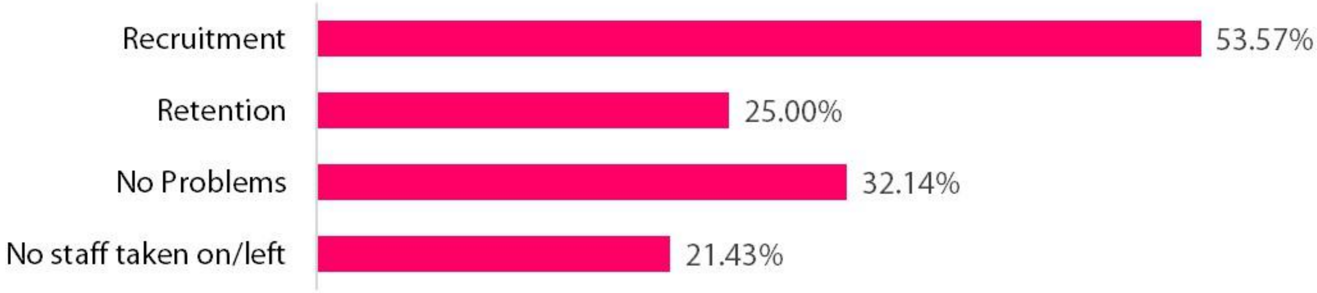
90.91% of respondents have had difficulties with recruiting lifeguards in the past 12 months and 60.61% have had issues retaining lifeguards. 9.09% reported as having no problems with the above. 6.06% said no staff had been taken on or left.

Instructors



82.35% of respondents have had difficulties with recruiting instructors in the past 12 months and 47.06% have had problems with the retention of staff. 8.82% reported that they had no problems with either recruitment or retention, and 8.82% said that no staff had been taken on or left.

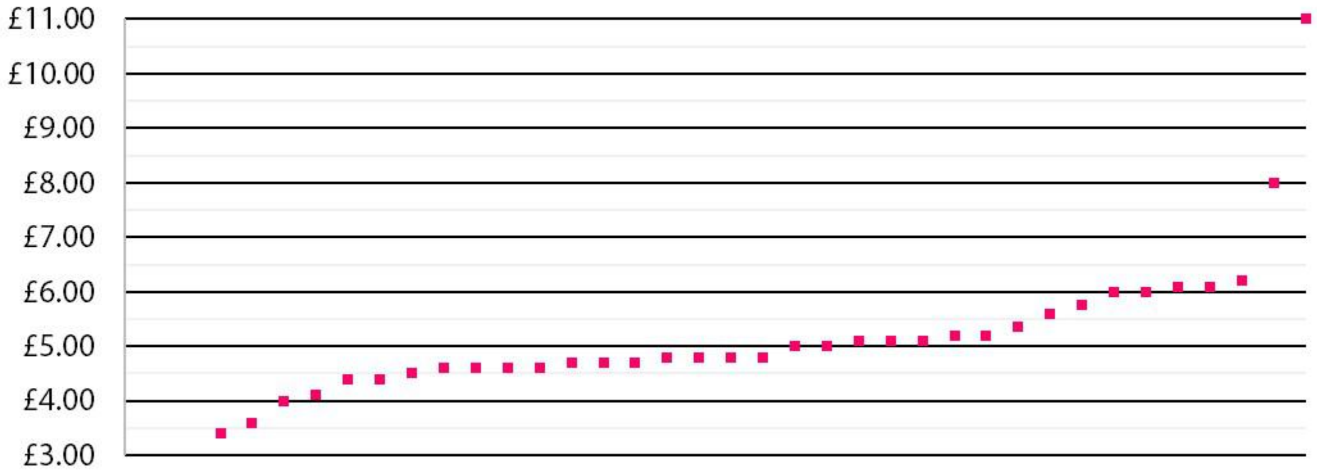
Technical / Managerial staff



53.57% of respondents have had difficulties recruiting technical / managerial staff and 25.00% have had problems retaining them. 32.14% reported as having no problems with either of the above, and 21.43% of respondents said that no technical / managerial staff had been taken on or left.

Section 5 - Charges

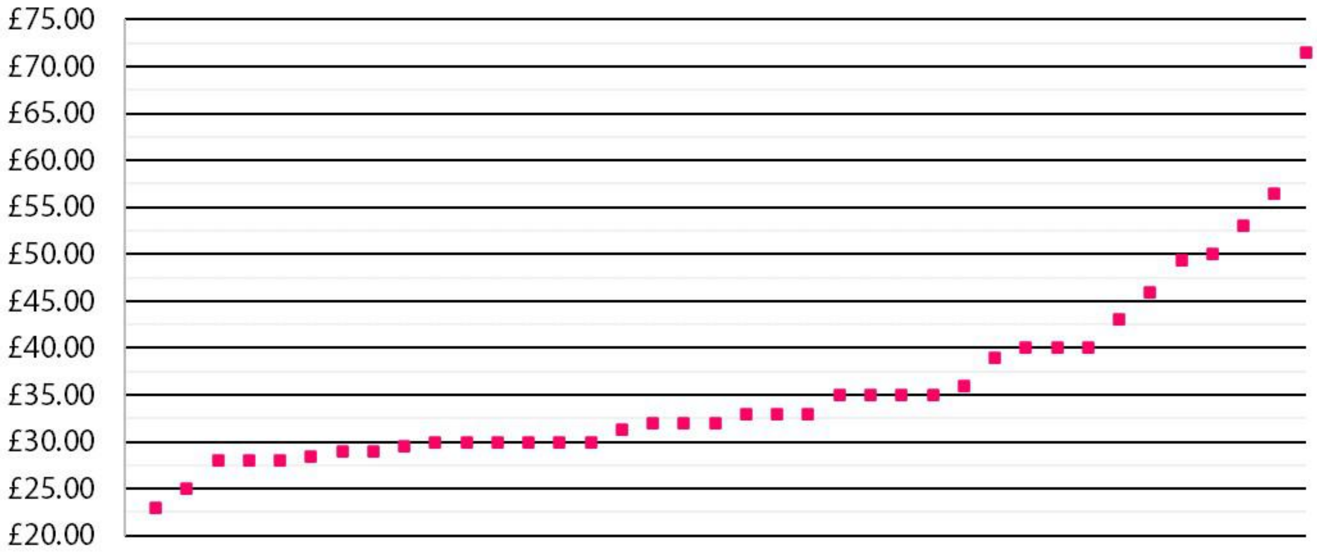
What is the charge for a single adult swim? Average price: £5.07



The charge for a single adult swim ranged from £2.85 to £11.00, with an average price of £5.07.

Typical monthly membership fee

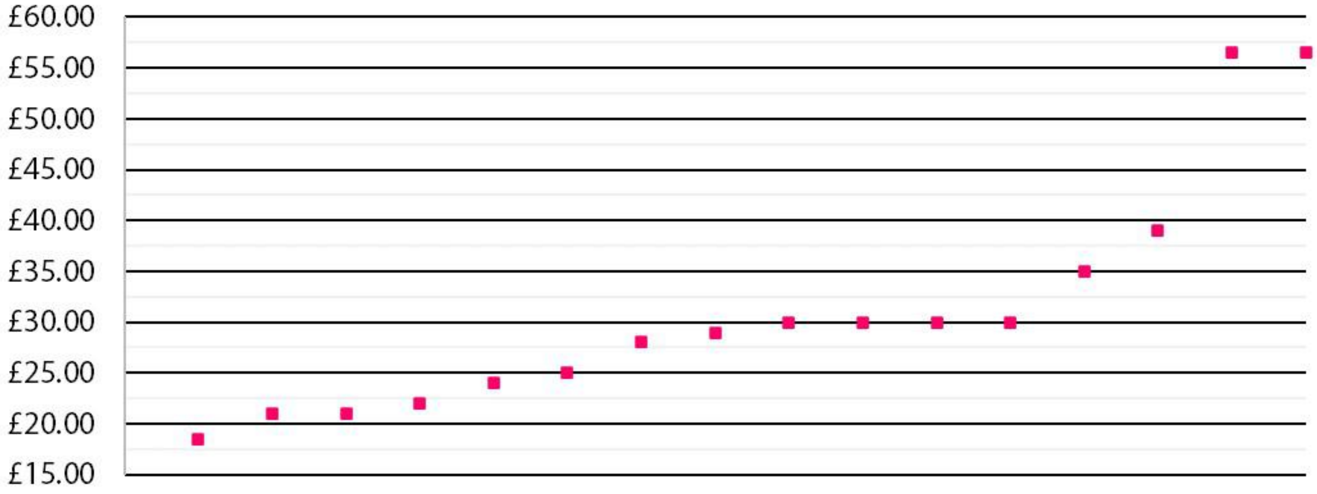
Full membership **Average price: £35.75**



The typical monthly full membership fee ranged from £23.00 to £71.50, with an average price of £35.75.

Off-peak membership

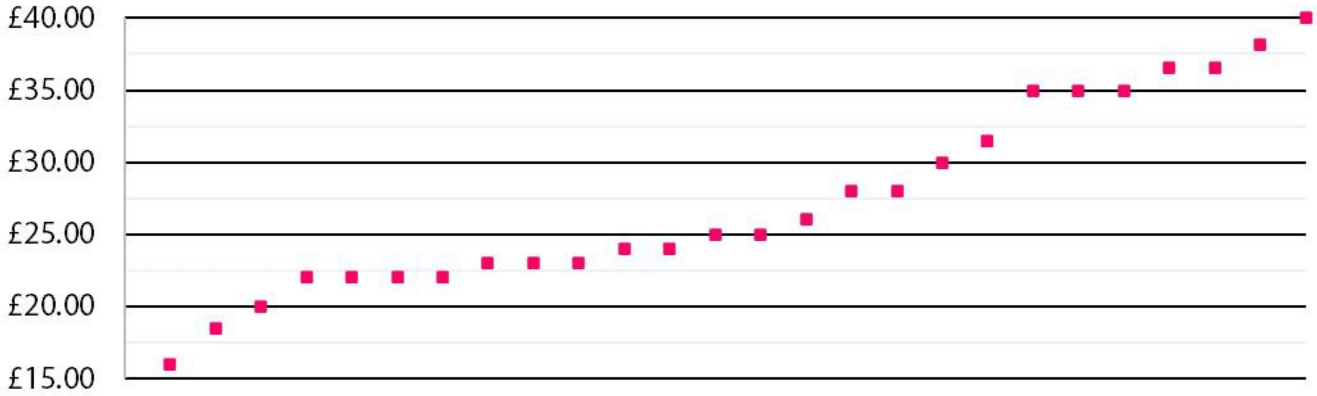
Average price: £30.97



The charge for off-peak membership was not offered by as many authorities, but for those that did offer one the charge ranged from £18.50 to £56.50, with an average price of £30.97.

Swim only

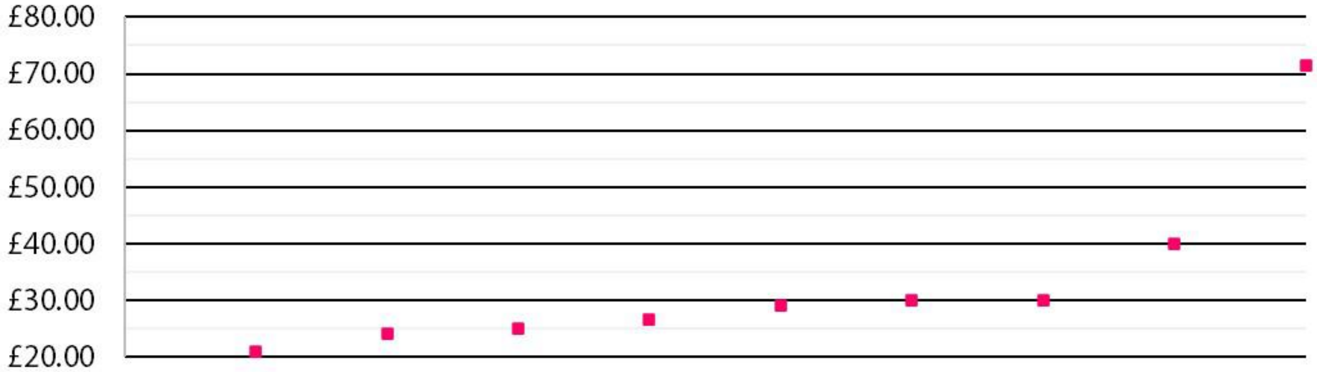
Average price: £27.28



Swim only membership charges ranged from £16.00 to £40.00, with an average price of £27.28.

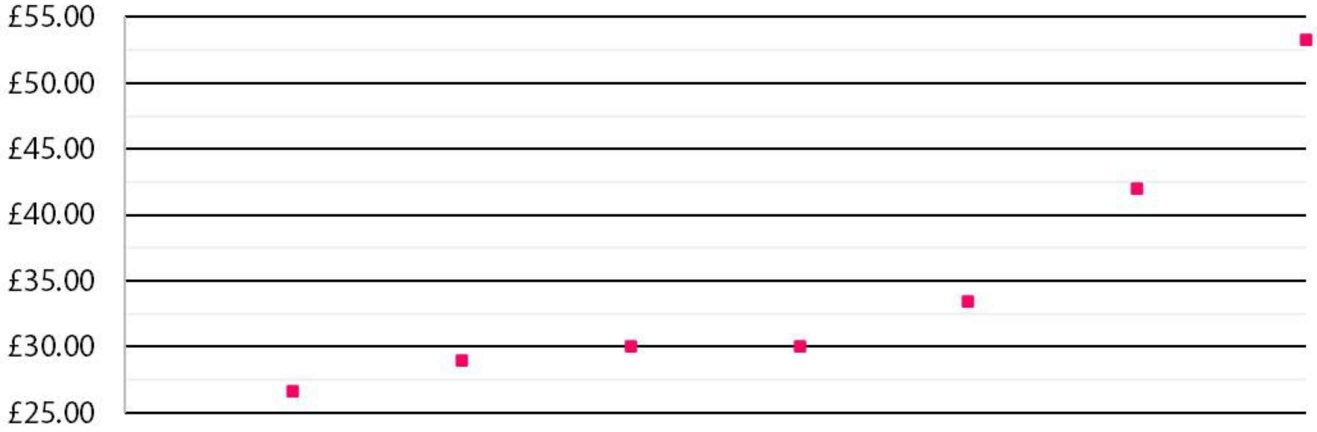
Gym only

Average price: £33.01



Gym only memberships ranged from £21.00 to £71.50, with an average price of £33.01.

Fitness classes Average price: £34.90

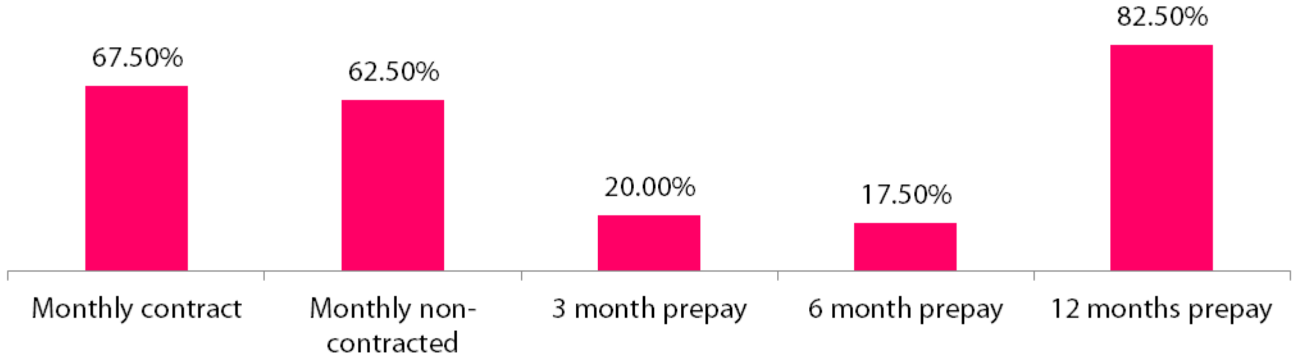


Gym only memberships ranged from £26.60 to £53.30, with an average price of £34.90.

Do you have a joining fee?

45.00% of respondents reported that they did have a joining fee for their leisure facilities. The charge for this was anywhere from £10.00 up to £33.70, with between £10-20 being the most common fee.

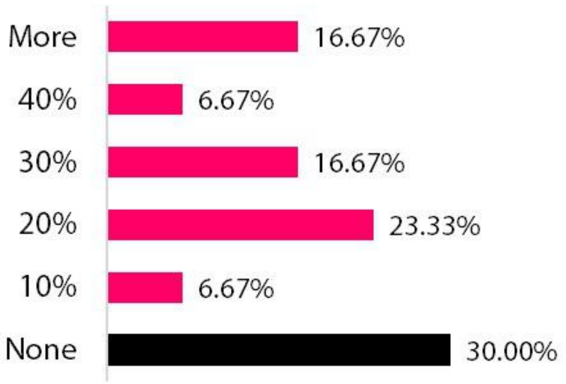
What membership payment types do you offer? (Tick all that apply)



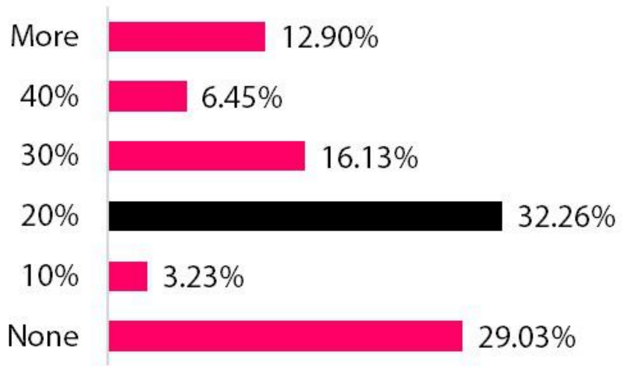
The majority of respondents offered 12 months prepay (82.50%), monthly contracts (67.50%), monthly non-contracted (62.50%). Only 20.00% and 17.50% offered 3 and 6 month prepay options.

Membership package discounts offered

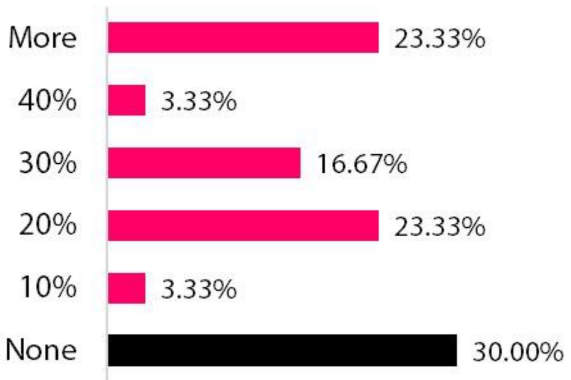
Low incomes



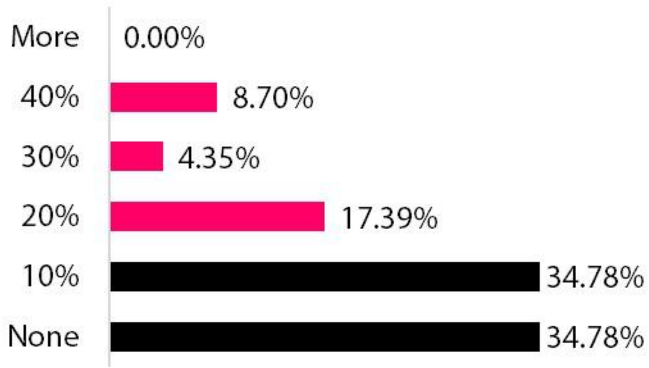
Over 65s



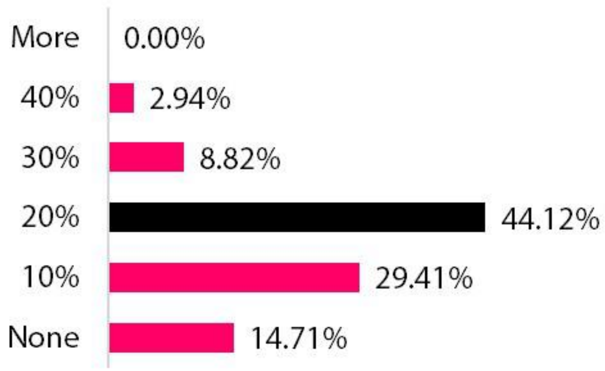
People with a Disability



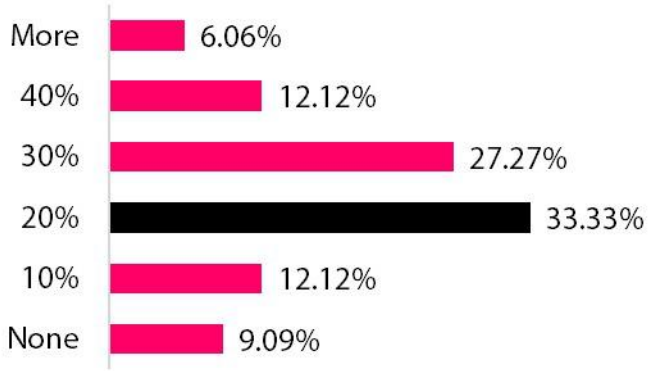
Couples



Corporate

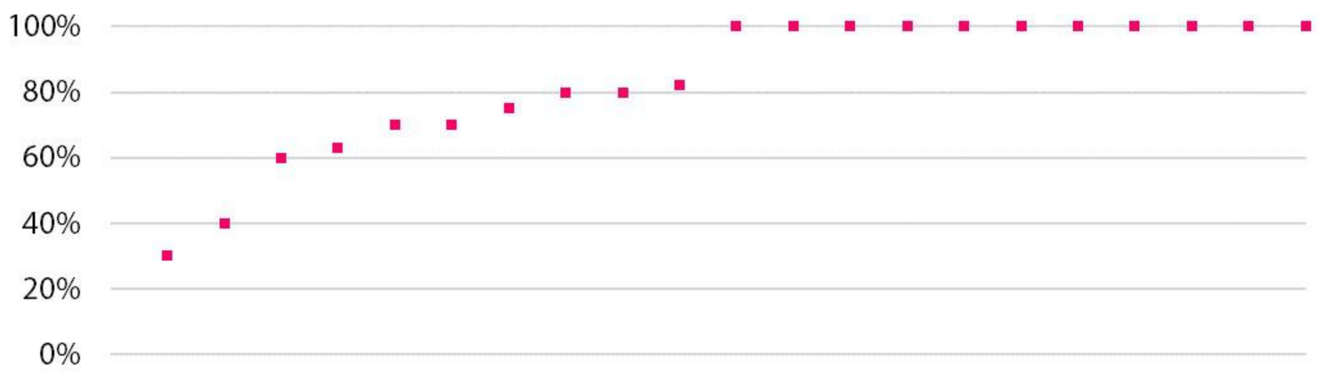


Students



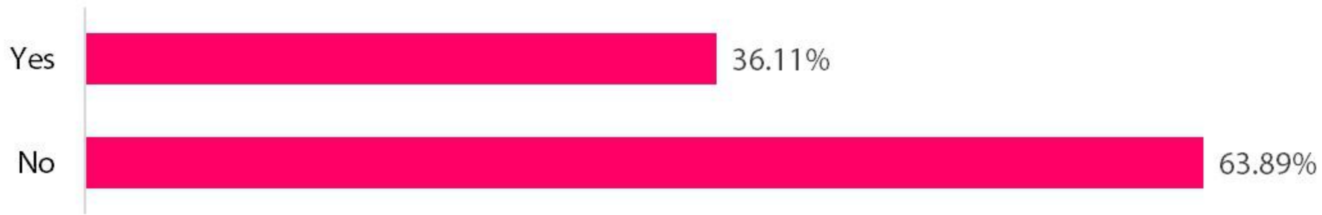
Responding councils offer a variety of membership package discounts. The most popular percentage amount for each of the categories was around 20%.

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



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

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



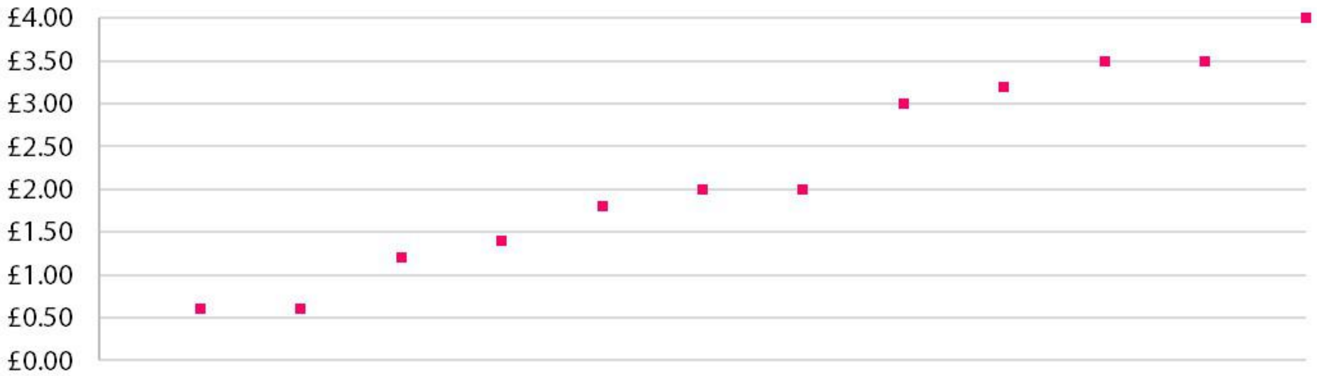
The majority of respondents did not charge for parking at any of their leisure centres (63.89%).

If you charge for parking, what does it cost?

One hour   Average: £1.53

Among the minority of respondents that do charge for parking at leisure centres, the average cost for one hour was £1.53.

Two hours   Average: £2.23

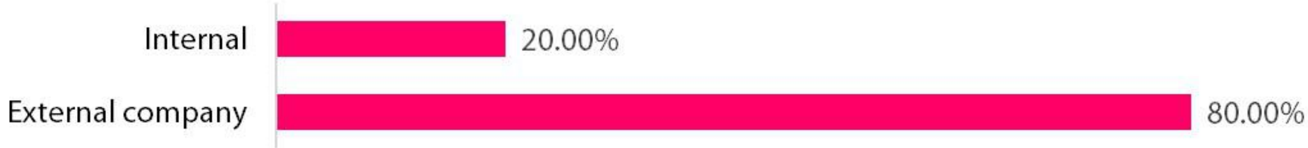


The average charge for parking for two hours was £2.23.

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

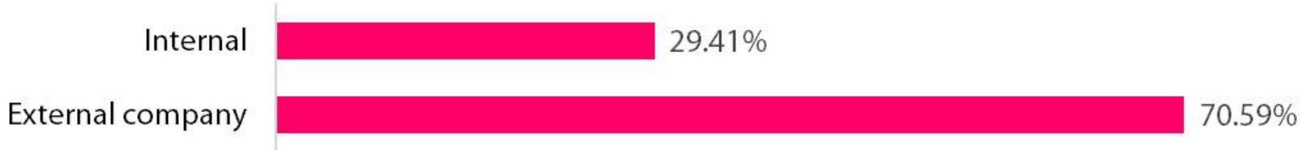
Roughly two thirds of respondents reported that they do refund a proportion of parking charges to leisure centre users (68.75%).

Who manages the direct debit administration?



80.00% of respondents use an external company to manage direct debit administration.

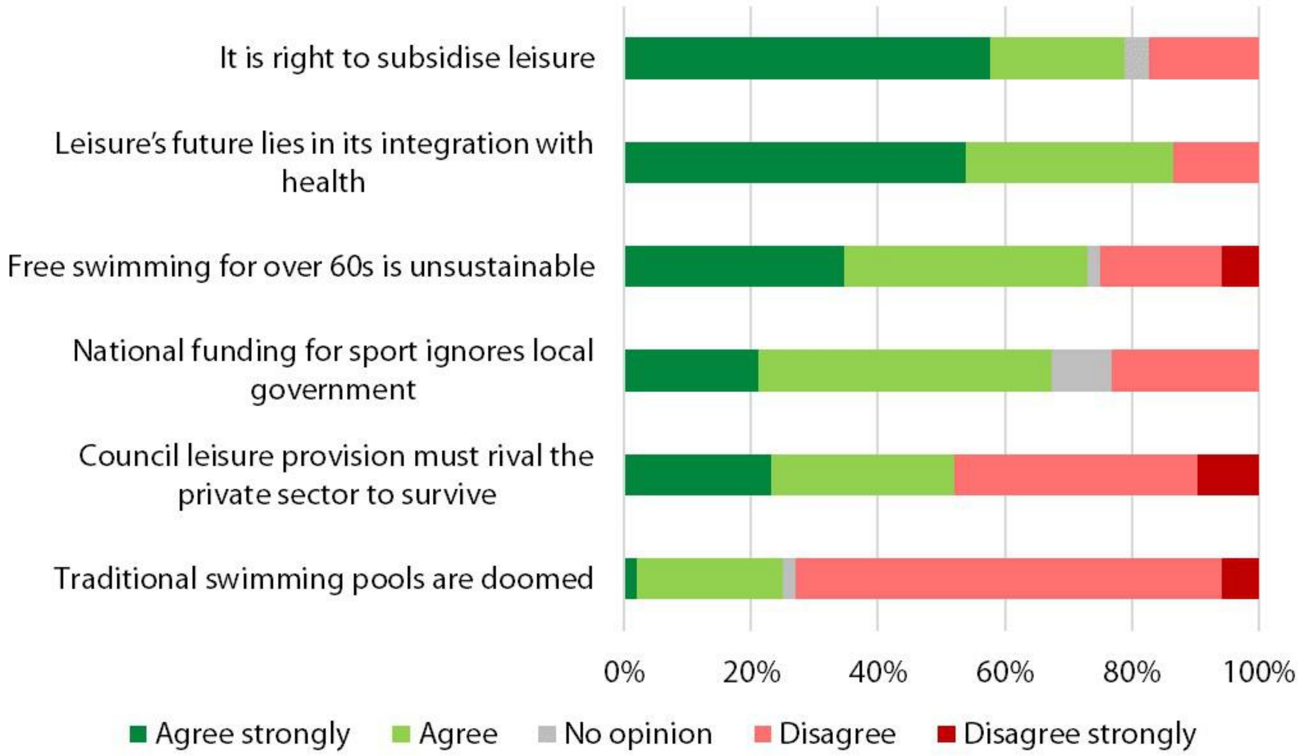
Who chases debtors?



70.59% of respondents use an external company to chase debtors.

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:

- With the cost of living increases it is even more important we are supporting those most vulnerable to access leisure
- Council leisure provision can and should be looked at from a commercial perspective with an aim towards being self-sustaining while still offering affordable services to our residents
- Sports and leisure needs to become a statutory function and link with health nationally

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:

- Public health partnership working
- Group exercise
- GP referrals
- Swimming
- Outdoor swimming
- Sports lessons and courses

- Private hire
- Off-peak market
- Memberships
- Casual leisure (e.g. soft play)
- Supporting those in poverty
- Children's activities
- Families
- Digital solutions
- Active travel
- General health & wellbeing

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

Areas of future decreases identified by survey respondents included:

- Traditional indoor sports and sports halls
- Creches
- Children's soft play
- Opening hours due to energy price increases
- Health initiatives
- Public swimming
- Leisure facility closures
- Devolving smaller sites to town councils
- Reduced timetables
- Catering
- Memberships
- Customer facing tasks due to digital improvements
- Lifeguarding
- Gyms
- Less face-to-face service, more self-service models
- Reducing reliance on staff

Local Authority Sports and Leisure Services

State of the Market 2022

APSE Comment

2022 marked the first year, post Covid and the disruption of lockdowns which critically affected leisure facilities. By mid-2022 attendance rates at leisure centres had only recovered to 80% of their pre-pandemic figure meaning few facilities were covering operating costs. February 2022 saw the beginning of the war in Ukraine and the subsequent increases in gas and fuel along with inflation, putting further pressure on budgets and potentially reducing discretionary spend on leisure memberships.

The next year will be critical to the future of Local authority leisure. APSE's report "Securing the future of public sport and leisure facilities" probed the challenges and risks facing public sport and leisure services which include:

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

The full report can be downloaded using this link. It's recommendations are now even more relevant.

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 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:-

- 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
- Recovery and Renewal

To join the sports and leisure advisory group please sign up here.