

Sports Club Survey Report 2017/18



Introduction

This report summarises the key findings of the Sports Club Survey 2017/18, identifying major trends, providing a SWOT analysis of sport and recreation clubs in England and offering a range of recommendations to Sport England and sport sector partners.

The Sport and Recreation Alliance believes that the power of sport and recreation can change lives and bring communities together. Together with our members and in partnership with the wider sector, we make the most of opportunities and tackle the areas that provide a challenge. We do this by providing advice, support and guidance and by being the voice of the sector. Working with Government, policy makers and the media, we help grassroots sport and recreation grow and thrive. Having an active nation is important as it delivers huge benefits to society and the millions of participants, volunteers, staff and spectators.

Sport England commissioned the Sport and Recreation Alliance (the Alliance) to deliver this project, and worked in partnership with the Alliance to shape key questions and areas for investigation. This report provides the Alliance's independent view of the data, opportunities and challenges facing the sector. The survey builds on previous Alliance led research in 2009, 2011 and 2013 and a smaller exercise conducted with European partners (led in the UK by Sheffield University, and funded by the European Commission) in 2015/16.

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Methodology

THE SURVEY

The Sports Club Survey has been undertaken by the Sport and Recreation Alliance since 2007. The last survey was delivered in 2013.

In 2017, The Sport and Recreation Alliance commissioned SPORTS MARKETING SURVEYS INC.¹ to develop and host the Sports Club Survey. In partnership with Sport England, the Alliance reviewed the 2013 questionnaire to identify which topics were the most important to revisit and compare with the picture in 2013 and which areas required further refinement and potentially new areas of questioning.

The survey was developed as an online questionnaire, with desktop, tablet and mobile optimised versions available for ease of completion. A plain text version was made available to ensure easy accessibility.

The survey was launched on Monday 13 November 2017 and was closed on Friday 19 January 2018.

Mapping our responses across Sport England's Club Count² reveals a high level of crossover and gives us confidence in the representativeness of the sample³.

SURVEY CONTENT

The survey covered a range of topics:

- Club activities and set up: including the type of club, how long the club had been operating, the sports/activities available, where activities take place, the facilities available to clubs, the organisation of the club, affiliation to governing bodies, communication methods used and administration;
- Members and participants: including the type of members the club has, changes to membership, reasons for engaging and leaving, the demographic profile of those taking part and club fees;
- The club's people: including the type of people working with, and giving time to the club, motivators and barriers to getting involved and workforce skills;
- The local community: including school partnerships, community engagement and support requirements;
- Finance, funding opportunities and support: including income and expenditure and relationship with NGBs and CSPs;
- Future support: including the expectations of the club, training and resources, equipment needs and future support.

1 Sports Marketing Surveys Inc (SMS). For more information, see <http://www.sportsmarketingsurveysinc.com/>

2 Club Count report: <https://www.sportengland.org/clubinsight/>

3 A small number of responses were received from clubs outside of England

SURVEY PROMOTION

The survey was widely promoted by the Alliance and through Alliance members via direct mails, newsletters, websites and social media. It was promoted directly via the Sport and Recreation Alliance and the Join In database as well as via Club Matters. The Alliance worked closely with other partners, including the County Sports Partnerships and national governing bodies (NGB) of sport in England who were asked to promote the survey.

DATA COLLECTION

The survey was hosted online via a secure site – which collected and stored data throughout the fieldwork period. Throughout the survey fieldwork period, the site was monitored for any technical issues. SMS INC. set up and monitored a dedicated email address for respondents to contact us, should they experience any difficulties. All issues reported were down to user error/knowledge and resolved quickly.

Security levels on the survey host site were maintained throughout the fieldwork.

SAMPLE AND CLUB TYPES

At the close of the survey, a data checking and cleaning process was undertaken. This reviewed the quality of responses and removed any duplicate responses.

In total 1,611 responses were received to the survey.

Partial completes containing some member data were reinstated into the data.

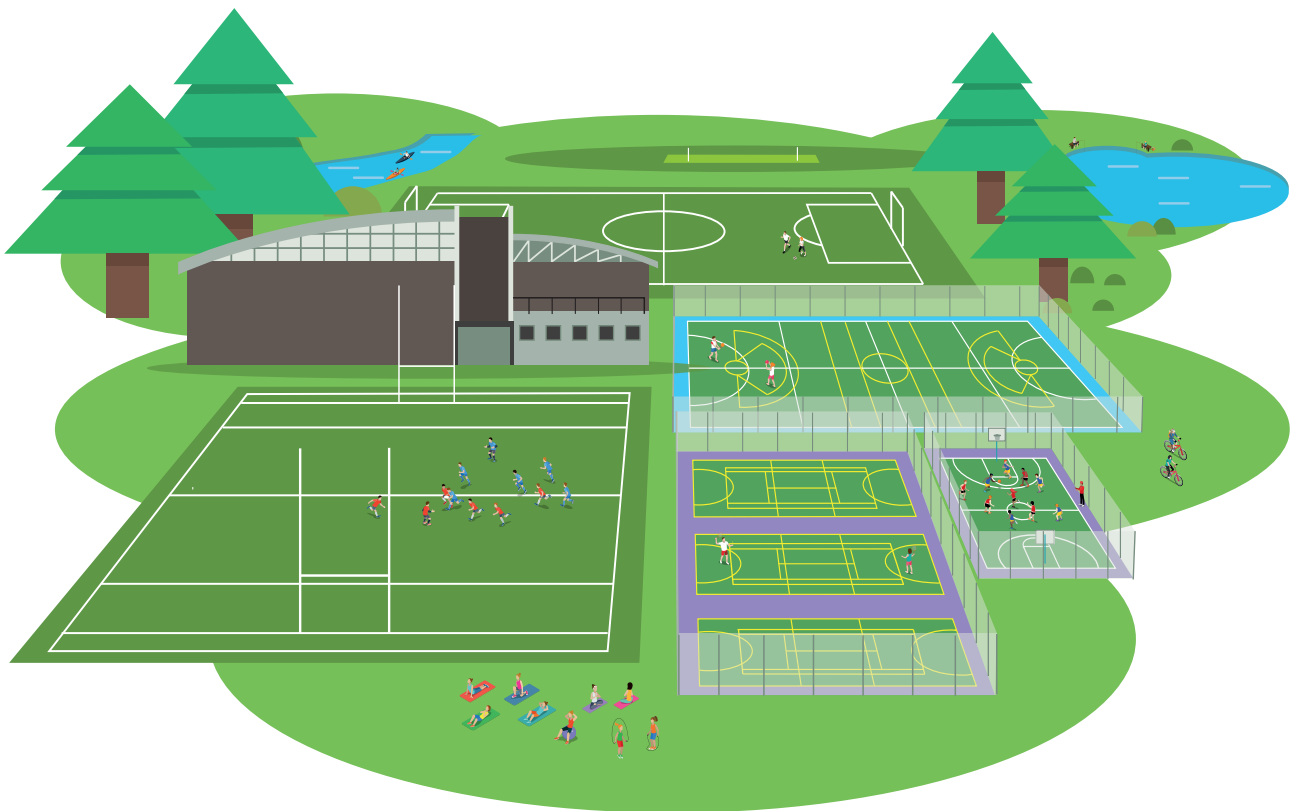
The file was checked for duplicates using the variables: club name, respondent name and postcode. Where a duplicate was identified, these were reviewed individually to assess whether they were true duplicates (these were removed) or legitimate duplicates (these were retained).

Where true duplicates were identified, respondent details were reviewed and the person that we felt had the most knowledge e.g. secretary, chairperson, member secretary, was retained, or provided more detailed responses.

Challenges and limitations

The primary challenges in conducting this exercise related to:

1. Sample size – the Alliance and Sport England commenced this project with an ambition of achieving a higher response rate. The lower than projected responses can be attributed to several potential factors, principally the far greater commitment to individual insight and research exercises amongst NGBs and other organisations within the sector. In addition, there is potential ‘survey fatigue’ within the sector more generally and the transitional period with Club Matters arrangements reduced the overall potential use of that resource and communications channel as a means of promotion.
2. The need to balance comprehensive data with the time taken to complete the survey: the survey was tested extensively before launch with an average completion rate of 18-20 minutes. This is broadly consistent with the time taken in field by most participants. However, the project team recognise that this represents a relatively large time commitment and in future would consider using a series of more ‘bitesize’ data gathering exercises over a longer period.
3. User error – a small number (fewer than 10) participants reported difficulties with the survey. Whilst these were all resolved quickly, it is possible that other users (including ‘drop outs’/partial responses) also had difficulty understanding some questions or completing the survey. This factor should not be overstated – and most likely only affected a small number of users.
4. Suggestions for further and future research follow later in this report.



Headlines

KEY FINDINGS: *The nation's sports clubs are in good health – with strong growth in participants and volunteers. Clubs continue to offer very good value for money, have impressive retention rates and work hard to engage with their local communities but elements of the club landscape are challenging.*

FINANCES

Average income: £35,648



Average expenditure: £41,874



MEMBERSHIP

Of clubs that completed the survey

TOTAL ADULTS:

186,650 participants

(55,433 non participating members)

PER CLUB

120 participating adults



42 non-participating adults



95 juniors



VOLUNTEERS



37

WORKFORCE



6 paid staff

CLUB MATTERS

As a primary source of club information, we asked respondents if they were aware of Club Matters:



51% YES (of these, half had used the resource)

43% NO

7% DON'T KNOW

ORGANISATIONAL STRUCTURE

- Non profit club run by members with a constitution and committee: 75%
- Non profit club which operates like a company with surplus funds re-invested: 7%
- Registered charity: 10%
- CIC (community interest company): 1%
- Charitable incorporated company: 1%

The sector is characterised by being heavily run on a not for profit ethos.

CLUB TYPE

- Single sport: 89%
- Multi sport: 11%

YEARS IN OPERATION

- Less than one year: 2%
- 1-3 years: 6%
- 3-5 years: 6%
- 5-10 years: 8%
- 10 years+: 76%

The sector is characterised by longevity – with the large majority of clubs having been around for over a decade.

The future

Clubs have a relatively optimistic assessment of the coming year:

- 53% expect their adult membership to grow
- 66% expect their junior membership to grow
- 44% expect their financial position to improve

Some clubs are planning improvements in the next two years (top 6):

1. Promote competitions and events – 45%
2. Trying new things to attract participants – 45%
3. Improve/invest in new equipment – 44%
4. Bid for/access funding support – 42%
5. Undertake training and development – 41%
6. Increasing the number of volunteers – 40%

But the majority of clubs are not planning any specific improvements in the areas surveyed – which would suggest considerable potential for improvement.

Clubs identified a number of potential challenges in the next two years (top 6):

1. Attracting and retaining new members – 68%
2. Recruiting and retaining coaches/having enough coaches – 48%
3. Increased costs – 44%
4. Accessing funding – 37%
5. Good volunteering practice – 36%
6. Facilities need improving/extending – 36%

Members

This is the total number of people who are members of the sports clubs who responded to this survey. This represents a large representative group active in community sport across England:

- Participating adults: 186,640
- Non participating adults: 55,433
- Juniors: 110,595

The average number of members per club is (mean/median):

- Participating adults - 120/50
- Non participating adults - 42/10
- Juniors - 95/33
- This compares to 114 adults (mean) comprising 82 participating and 32 non participating in 2013 with a mean average of 90 juniors.
- **TREND = POSITIVE**



Clubs report a positive membership trend on last year (as well as a further long term positive trend being discernible from 2013 data):

- Participating adults: Decrease – 18%; Stable – 36%; Increase – 42%
- Non participating adults: Decrease – 10%; Stable – 50%; Increase – 21%
- Juniors: Decrease – 15%; Stable – 27%; Increase – 56%

Strong growth in membership demonstrates that the club model still has major strengths and would suggest that sport clubs have a significant role to play in delivering outcomes in communities moving forward. Clubs should have a central role in the delivery of Sport England's ambitious engagement strategy.

More detailed analysis of membership numbers reveals some interesting trends: 74% of clubs who responded have members who are under the age of 16, while a quarter (25%) do not have any junior members.

The average number of adult participating members per club has increased by 30% since 2013, where the average number of members per club was 82. The average number of junior members has also gone up, from 90 in 2013 to 95 in 2017, an increase of 5%. The average number of non-participating members also increased, but only by 9%.

41% of clubs report that the number of participating adult members in their clubs has increased over the past year, with 35% saying it has remained the same. Just under a fifth of clubs, on the other hand, have said their adult participating members figures have gone down (18%).

Encouragingly, 56% of clubs said they have seen an increase in the number of junior members joining in the past year, while just over a quarter said their junior membership has remained the same (27%). 15% of clubs have seen a decrease.

The average sports club, over the past year, has gained 19 new participating adult male members, 18 new participating adult female members and 22 new participating junior members.

The five most popular reasons for members joining a sports club, according to those who responded, were:

- Enjoyment of the sport/hobby - 90%
- To train/take part competitively - 68%
- Social opportunity – activity with friends - 63%
- To try a new activity/something different - 48%
- To keep fit - 43%



Enjoyment of the sport and social contact are key drivers for membership – and this strongly resonates with our own experience of the sector. It is particularly encouraging that clubs are well-placed to reach beyond the ‘core market’ and are bringing new people into sport.

On average,
an adult participating member
has stayed at their club for:

**12
years**

Clubs are therefore a strong source of retention of people within sport – and this potential could be leveraged further.

REASONS FOR LEAVING

The average sports club lost 8 male and 10 female adult participating members over the last year, as well as 15 junior members. This could suggest that clubs are better at retaining male members than female members – this should be addressed as a priority.

An analysis of why, according to those who responded, members leave clubs reveals some interesting statistics (top 6):

- 1 Change of personal circumstances (e.g. moving) - 60%
- 2 Too busy - 34%
- 3 Family commitments - 27%
- 4 Work commitments - 27%
- 5 Hours/times do not suit - 23%
- 6 Cost - 12%



There are some positives to take from this – particularly in that the majority of these factors are not directly associated with the club's own offer. However, these are also widespread and common factors across society (and factors which clubs will struggle to tackle as they have relatively little control). There is an opportunity to act in this area – for example in the practical step of signposting and handing over members to new clubs when they move to a different area.

Overall, this means that clubs, on average, increased their male adult participant membership over the last year by 11 members, their female participant adult membership by 8 and their junior membership by 7. Just over half of the clubs who responded said the level of involvement of the majority of new members generally ranged from a mixture of complete beginners, active at a different club/facility or are lapsed participants (51%). Just over a quarter (26%) said the majority of new members were complete beginners in their sport/activity, while 17% said most of their new members had been active in their sport at a different club/facility.

JUNIOR MEMBERS

A large majority of clubs (74%) have junior members (under the age of 16).

On average, a sports club has 49 junior boys and 34 junior girls in their membership. Of those, an average of five have a disability. 48% of clubs have junior members with a learning disability/difficulty, while 44% have junior members who have social or behavioural problems. In contrast to adult members with a physical disability (51%), only 38% of clubs have junior members with a physical impairment. 20% of clubs have junior members who are deaf or hard of hearing, while 12% have members who are blind/visually impaired.

20% of all clubs say they do not have any disabled junior members.

Clubs continue to recruit strongly amongst young people – our experience is that providing a good quality experience in sport and recreation at an early age is a key component of people sustaining active habits throughout their lives.

Demographics of members

The vast majority of clubs have White British members participating at their club (97%), with 51% also reporting they have people who are classed as White Other. 39% of clubs have members who are of Mixed Race, while 37% have Black members and 36% of clubs have South Asian members. 20% of clubs also have Chinese members.

On average, each club has:

- 46 members in the 26-54 age bracket (39% of participatory members)
 - 34 members in the 16-25 age bracket (29%)
 - 28 members in the 55-64 age bracket (24%)
 - 24 members in the 70 or older age bracket (21%)
- and:
- 101 White British participating members (86% of all adult participant members)
 - 19 Black members (16%)
 - 15 White Other members (13%)
 - 14 Mixed Race members (12%)
 - 13 South Asian members (11%)
 - 2 Chinese members (2%)

The average number of White British participating members of a sports club is slightly higher than the national average recorded in the 2011 National Census (80%). The percentage of Black members of a sports club is also slightly higher than in the census (13%).

The percentage of sports club members who are White Other is significantly higher than the figure recorded in the census, which is 4%. The figure for people of South Asian ethnicity is also higher than the figure recorded in the census (5%) ⁴.

⁴ <https://www.ons.gov.uk/peoplepopulationandcommunity/culturalidentity/ethnicity/articles/ethnicityandnationalidentityinenglandandwales/2012-12-11>

Disability

Amongst clubs that offer provision for disabled people, the clubs that responded have:

- A total of 7,753 adult participating disabled members
- Mean average – 10, Median average – 3

Where captured, disabled participants were:

- Physical impairment(s) – 51%
- Deaf/hard of hearing – 35%
- Learning disability/difficult – 35%
- Social or behavioural problems – 33%
- Mental health condition – 22%
- Blind or visually impaired – 18%



The average sports club also has **10** disabled participating members (9%).

This is much lower than the percentage of disabled people currently recorded as living in the UK (21%)⁵.

11% of clubs say they do not have any disabled participants.

Disabled people are under represented in clubs, in sport more generally and in society more widely. This remains a priority area for action.

⁵ https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/600465/family-resources-survey-2015-16.pdf

The Club's People - Volunteers

The club network remains hugely indebted to a large number of dedicated volunteers. Volunteers significantly outnumber paid staff:

There has been a strong growth in volunteers since 2013:



This means that the average sports club has 12 more volunteers than in 2013 (an increase of 33%). Although the average increase per year has slowed from the 20% increase recorded between 2011 and 2013 in the last Sports Club Survey, there has still been a steady and encouraging rise in the number of people volunteering at a sports club in the last four years. This provides an encouraging and strong base for Sport England to build its new volunteering strategy – with some key areas for potential improvement highlighted below.

Volunteers fulfil a wide range of roles within clubs (top 6), with clubs having the following roles:

- Administrative/committee roles – 87%
- Coaches/instructors – 80%
- Referees/umpires/officials – 66%
- Other roles – 53%
- Transport – 28%
- Stewards/marshals – 26%

The six most popular motivations for volunteers, according to those clubs who responded, were:

1. Passion/enthusiasm for the sport - 72%
2. To give something back to the community/club - 59%
3. Parent/guardian/grandparent of a participant - 43%
4. To remain involved after retiring/stopping active participation - 24%
5. Being asked to help by family/friends or family/friends who already do it - 18%
6. Social opportunity - 15%

Barriers for volunteers, according to those clubs who responded, (top 6):

1. Lack of time - 72%
2. Work commitments - 59%
3. Family/home commitments - 43%
4. Conflicting leisure time activities - 24%
5. See it as someone else's responsibility - 18%
6. Have no interest - 15%



Similar to the reasons why members leave, many of these factors are beyond the direct control of clubs. However, these factors are very likely to remain the same, or to worsen which could pose a challenge in attracting new and different volunteers. Clubs will likely benefit from support around the development of new and flexible volunteering offers.

Clubs have continued to pursue traditional approaches to recruitment and retention and are typically still deploying volunteers in traditional, sport focused roles. There is potential to diversify the people who volunteer and to deploy these skills in new areas – particularly in working with inactive people.

Clubs are still predominately using traditional methods to recruit volunteers (top 6):

- | | |
|------------------------|----------------------------------|
| 1. Word of mouth - 84% | 4. Own website - 46% |
| 2. Face to face - 79% | 5. Noticeboard in facility - 29% |
| 3. Social media - 48% | 6. Handing out leaflets - 10% |

Clubs rely significantly more on 'face to face' methods i.e. more on personal connections. Social media and online communication are still being significantly underutilised by clubs. 56% of clubs say they actively recruit volunteers, with 34% saying they didn't.

Volunteering roles on boards and committees remain more likely to be fulfilled by men. The average club has 6 male and 4 female members on its Board or Committee. The evidence tells us that diversity of people and diversity of thought at this level is important in allowing clubs to develop and attract new people.

The high number of clubs citing work commitments/patterns as a barrier to recruiting volunteers suggests that more could be done by employers to promote volunteering leave or flexible working to encourage more of their staff to volunteer.

The Club's People - Paid Staff

Clubs have paid staff in the following areas:

- Coaches/instructors (22%)
- Providing other roles (10%)
- Administrative/committee role (9%)
- Paid referees/officials/umpires (8%)
- Paid stewards/marshals (2%)
- Provide transport (1%)

On average,

22%

of clubs have paid
coaches / instructors



There has also been an increase in the number of paid staff employed by sports clubs, from 2 in 2013 to 6 in 2017. Paid staff play an important role in clubs, but are significantly outnumbered by volunteers – and this is where Sport England and others should primarily concentrate their efforts and support.

There are several areas in which a club's paid staff and volunteers would benefit from additional skills, either volunteers or paid.

When clubs were asked to identify areas where paid staff and volunteers felt they lacked skills/experience in:

- 39% said specialist sports skills/knowledge
- 28% said teamwork/volunteer management
- 27% said communication
- 27% said instructing/teaching/training
- 23% said making your sport inclusive for disabled people
- 19% said knowledge of welfare/safeguarding
- 18% said computer literacy/IT skills
- 16% said handling other people's emotions/feelings
- 14% said creating a welcoming environment
- 12% said time management
- 11% said writing instructions/reports
- 10% said problem solving
- 10% said knowledge of services offered by clubs
- 2% said basic numerical skills
- 5% said other

Finance

Finance remains a challenging issue for the sport and recreation sector at the grassroots level.

INCOME

The total income recorded by clubs responding to the survey was:

£39,176,898

The average income by club in the survey was **£35,648** (median - £8,000) with some 57% of clubs having an income of below £10,000.

The mean income of clubs in 2013 was **£42,845**

Encouragingly, only 22% of clubs recorded a deficit over the past year, which is down from the 24% recorded in 2013. Over half of clubs (55%) said they are running a surplus, an increase from the 48% of clubs who recorded a surplus in 2013. 21% of clubs said they broke even, a slight decrease from 2013 (28%). This suggests that clubs whose finances were precarious five years ago have struggled to improve their financial position since and have consequently started to make a loss.

When asked what they have done to increase their revenue over the last 12 months, clubs have said they have actively recruited more members (48%), held more social events (41%) and applied for additional funding (38%). Other things clubs have done include:

- Increase membership fees (28%)
- Offering sponsorship opportunities to other organisations (24%)
- Accessing community grants (23%)
- Hiring out the club's facilities (22%)
- Holding sponsored events/challenges (17%)
- Increasing/introducing additional costs to members (14%)
- Developing a new way to make money for the club (12%)
- Increasing charges to non-members (7%)
- Undertaking crowd funding campaigns (3%)
- Accessing social finances (1%)
- Using community shares (1%)
- Have not taken any specific measures (15%)

There is significant potential for clubs to increase their income. Our experience is that clubs often undervalue their assets and the value of their work – Sport England, NGBs and the wider sector should work together to support development in this area.

EXPENDITURE

The total expenditure recorded by respondents to this year's survey in the year before was:

£45,935,757

This breaks down to:

The average level of expenditure by club was **£41,874** (median: £8,500) - suggesting a high level of concentration in expenditure at larger clubs.

The mean average expenditure in 2013 was **£40,824** - representing a small increase (not accounting for inflation).

Clubs who partially/fully own their facilities responded with the following:

Costs are rising, with clubs reporting increases in the following areas:

Outdoor facility maintenance (58.8%), indoor facility maintenance and electricity bills (both 33.7%) were cited as the three most significant costs by clubs over the last financial year. Other options which significantly contributed to a club's spend include:

- Property insurance (20%)
- Equipment servicing/testing (17%)
- Bar stock (17%)
- Business rates (12%)
- Bar staff (12%)
- Water bills (8%)
- Lighting servicing/testing (5%)
- Surface testing (2%)
- Alcohol (1%) or music license (1%)
- Other (22%)



54%

of clubs have not undertaken any specific measures to reduce their costs.

There are several areas for action:

Relatively high costs in maintenance and fixed costs – which are likely to increase and could threaten the sustainability of clubs. This should be addressed as a priority.

Costs are increasing and limited opportunities to reduce expenditure have been identified – particularly on areas including utility costs and insurance.

FEES

Club fees continue to represent good value for money:

Participating members

- Mean - £108
- Median - £59.50

MEAN AVERAGE

£73



2011

£78



2013

£108



2017

Non participating members

- Mean - £19
- Median - £10

MEAN AVERAGE

£13



2011

£14



2013

£19



2017

Junior members

- Mean - £68
- Median - £30

MEAN AVERAGE

£44



2011

£46



2013

£68



2017

Over the last year, these fees have generally remained fairly stable:

- Participating adults: Decrease – 2%; Stable – 62%; Increase – 28%
- Non participating adults: Decrease – 2%; Stable – 64%; Increase – 11%
- Juniors: Decrease – 2%; Stable – 70%; Increase – 23%

We compared club fees to leading leisure chains, where a comparison of the wider industry reflects positively on local sports clubs. To compare with private leisure facilities, we took a mean average of five major gym fees (£2,898 divided by 5 = £579.60) to calculate an approximate average yearly fee, 2017). This is an approximate calculation and is intended to provide an indication of the relative costs of different types of provider.

Sports clubs should be a core part of efforts to open up the benefits of sport and physical activity to people from lower socio economic backgrounds.

Regulatory and associated issues

INSURANCE

We asked clubs what types of insurance they had in place:

- Public liability insurance – 83%
- Property insurance – 36%
- Employer liability insurance – 31%
- Professional indemnity insurance – 21%
- Business insurance – 10%
- Don't know – 15%

SAFEGUARDING

72% of clubs received guidance and support from their NGB on safeguarding and injury management (16% did not, 12% did not know).

70% of clubs have a publicly available safeguarding policy

8% do not have a policy

12% do not have a formal policy

11% did not know



Clubs are potentially exposing themselves to significant moral, financial and reputational risks.

Facilities and schools

FACILITIES

Club activities mainly take place:

- In a hired facility – 52% (up from 49% in 2013)
- In a leased place – 20% (down from 25% in 2013)
- In a facility owned by the club – 19% (down from 21% in 2013)
- In a facility partially owned by the club – 3% (up from 1% in 2013)
- In a public space – 15% (this figure was 14% in 2013 and 25% in 2011)
- In a borrowed facility (e.g. from a school or another club) – 8%

Where facilities are leased, hired or borrowed this is from:

- The local authority – 36% (the local authority is directly responsible for maintenance in 59% of these cases). Local authority hiring accounted for 38% of facility use in 2013
- A school – 29%
- A private operator – 26%
- Another club – 7%
- A university – 7%
- A trust or charity – 14%
- Other – 8%

In total, over two thirds of clubs, 69%, use facilities that belong to the public sector, demonstrating the reliance of sports clubs on public sector bodies to help them deliver their activity. Given pressures on public sector finances, this leaves the club sector very exposed.



In 2013, 62% of clubs that hired or leased facilities rated them as either good, very good or excellent. This has increased marginally to 63% this year. 25% said it was average, while only 12% rated their facilities as poor or very poor.

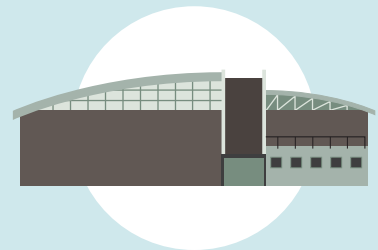
Of the clubs who said their facility is owned by a local authority, 59% of those clubs reported that the local authority is responsible for maintaining that facility. 27% of clubs maintain their local authority owned facility. 10% said a combination of users were responsible for the maintenance of their facility.

Over one third of clubs (39%) reported having access issues with or restrictions on the public space where their activity takes place.

Specific facilities have access to: (top 12)

1. Changing rooms – 57%
2. Equipment storage area – 47%
3. Outdoor pitch, lawn, course, green, court – 36%
4. Club house/pavilion – 33%
5. Sports hall – 29%
6. Outdoor sport specific facility – 29%
7. Bar area – 29%
8. Disabled parking – 26%
9. Social area (non bar) – 24%
10. Indoor sport specific facility – 24%
11. Floodlights – 21%
12. Disabled changing facilities – 20%

Facility improvements



In the last two years:

21% of clubs have invested money in building new facilities

69% of clubs have invested in improving existing facilities

Around 23% of clubs claimed zero rating VAT on the money invested in new facilities. This represents a potentially under-utilised opportunity where clubs could be developing new facilities on a more cost efficient basis. This is particularly pertinent given the importance of facilities and pressures on budgets.

ONLINE BOOKING

We asked respondents about whether they use an online booking or enquiry system:

- Yes – 35%
- No – 60%

There is considerable potential to utilise sector wide efforts to promote the use of open data – though these findings would suggest that the club sector will need significant support to maximise this potential.

Equipment

We asked clubs how they rated the quality of the equipment they use:

- Very poor – 1%
- Poor – 6%
- Average – 25%
- Good – 38%
- Very good – 27%

Whilst this paints a relatively positive picture of the current state of club equipment, the picture in relation to disabled and non-disabled participants being able to participate together is less positive.

This represents a major issue when considering the wider context of under participation amongst disabled people:

- Yes – we have appropriate equipment for members to participate fully – 43%
- No – we don't have equipment for members to participate fully – 29%
- Don't know – 12%
- Not applicable – 16%

Further concerns about future maintenance, particularly given the high level of local authority maintenance arrangements was also highlighted:

- Appropriate equipment to carry out facility/playing surface maintenance - 41%
- Don't have the appropriate equipment – 44%
- Don't know – 15%

Engaging with local communities

There is a high level of engagement with local communities, though this year's survey would suggest that clubs could do more:

Clubs do recognise the potential to engage local communities, and when asked which audiences they would primarily target, selecting up to three choices, they responded (top 6):

1. Young people – 66%
2. Women – 33%
3. Girls – 26%
4. Families – 23%
5. Other population – 20%
6. Men – 20%



Given the prevalence of younger audiences on this list, the fact that a majority of clubs currently have no partnerships with local school is instructive. Clubs would welcome support in targeting these specific groups (48% answered yes, and 33% don't know).

SCHOOLS

53% of respondents do not have any partnership arrangements with a school(s); 41% reported that they have current partnerships, and 6% either were a school club or did not know. In the 2013 survey more than half of the sports clubs, 58%, reported working with schools.

The rate of engagement with schools has significantly worsened. Whilst this is to be expected to an extent given the ending of School Sport Partnerships from 2011, our experience is that schools are a vital source of facilities and engagement with young people and should be prioritised more highly.

Of those clubs who do work with schools, the majority say that it has been beneficial to their club (87%), with a nominal amount (8%) saying it has not been beneficial. When asked what benefits that had resulted from the partnership with schools:

- 82% say it has inspired young people to try a new sport
- 73% say students from the school join the club

Other benefits cited by clubs include:

- Assisting schools with coaching/officiating (51%)
- Opportunity to identify talent (41%)
- Advertising for our club is displayed in the school (38%)
- Being able to use the facilities of the school (36%)
- Opportunity to recruit new volunteers (20%)
- Exposure to multiple schools through competitions (18%)
- Access to funding (17%)

A development of this survey was to include the open ended question ‘**Why has your club decided not to engage with school partnerships?**’ Results showed a mixed response to why clubs do not engage.

Thematic analysis based on a snapshot of responses:

“ Don’t have the resources available to go into schools during weekdays to help. Something we really want to address.”

“ Volunteer time allows one offs with several schools but not permanent partnerships.”

“ Too difficult to arrange.”

“ Lack of volunteers to do it.”

“ We have tried but have no one free to work alongside the schools due to lack of time.”

“ Work commitments of coaching volunteers means can’t offer taster sessions at schools.”

“ Time constraints.”

“ We don’t have time or the volunteer base with enough free time to make this happen.”

“ Work based club.”

“ Time availability of members to engage with schools.”

“ No one with enough time during the week: Have had in previous years.”

“ Not enough resources.”

“ We are not large enough to deliver this.”

SWOT analysis

On the basis of the data from this survey, as well as wider insight gained from contact with a wide range of NGBs and other organisations within the sector, the Alliance has provided a 'SWOT' analysis which summarises Strengths, Weaknesses, Opportunities and Threats within local clubs for further consideration.

Many of these factors in reality cut across all four categories. On an overarching basis, the data demonstrates that the club sector has great assets, presence and profile. However, there are long term threats and challenges to the sector's viability which Sport England, NGBs, CSPs and local authorities (with other partners) should work together to overcome.

Strengths

S

- Longevity – the large majority of clubs have a well established community presence
- Inclusivity – 55% of clubs offering opportunities for disabled people and non disabled people to participate together
- Value for money – the average club charges fees of £108 (adult) and £68 (junior) per year
- Well supported – particularly by their NGBs

Weaknesses

W

- A high level of dependence on local authority facilities at a time of falling local authority budgets
- Clubs lose a disproportionately high number of female members
- Many clubs suffer from a relative lack of improvement plans
- Clubs continue to rely on traditional volunteer recruitment methods

Opportunities

O

- Club Matters – there are many high quality resources available, but 49% of clubs remain unaware of this support. Of those who are aware, 50% currently use them. There is considerable potential to support clubs more
- Online communication and open data present significant, under-used recruitment and management potential
- Community engagement – clubs are aware of their role and positive about it and with support could engage more effectively
- Facility owning clubs could benefit more from reliefs, including VAT/zero rating
- Costs are increasing, and clubs have the opportunity to save through expenditure reduction
- Volunteer numbers are increasing, and clubs have the opportunity to capitalise on their role and assets to grow and diversify their volunteers
- Many clubs could do more to engage more with local schools

Threats

T

- Leases and premises – some clubs are in a precarious position
- Insurance – many clubs do not have several types of potentially relevant insurance in place
- Safeguarding – significant numbers of clubs lack a clear policy on protecting children and adults at risk
- Clubs are affected by wider social and workplace pressures around a lack of time to take part – and have limited potential to change this
- Fixed costs are increasing and clubs will need to find ways to tackle this
- Clubs are not yet skilled enough in building a diverse and inclusive offer for all members of the community to take part

Recommendations

The data and our wider insight provide a view of the current state of sport and recreation clubs in England. The landscape is challenging – with finances and access to facilities as particularly prevalent issues for the sector. Overall, the sector’s health at club level could be characterised as broadly positive with progress in some areas since 2013 – including in membership and volunteer numbers . Some areas are consistently challenging, particularly around finances with reductions in income and costs increases across several areas.

In light of the data and wider insight, the Alliance offers the following recommendations to Sport England:



1. *Diversity and inclusion – ongoing challenges*

- This data demonstrates an ongoing and significant challenge around diversity. Urgent work is needed to support the sector in its understanding of promoting itself and its offer (including volunteering opportunities) to under-represented groups. This includes:
 - Gender
 - People from BAME backgrounds – particularly in more senior roles
 - Disability



2. *Supporting the sector and Club Matters*

There are many high quality resources available to the sector, including through Club Matters. Sport England should:

- Ensure that maximum opportunities for promotion are identified and pursued given a high number of organisations not currently using the resource;
- Ensure that these resources are kept up to date and are timely – for example responding to major events and changes to legislative and regulatory requirements;
- The survey has identified a particular issue which should be tackled through specialist support and advice in terms of relatively high numbers of clubs having no policy (or no published policy) for safeguarding.



3. Broaden the use of cross sector data and research

- There is potential to more effectively collate and share data, trends and findings across the sector. Many NGBs and others are now conducting their own research and insight exercises which is a very welcome development;
- Sport England should place clear requirements, **proportionate to the type of organisation and size of investment**, on all funded bodies to share relevant, quality data on clubs;
- Sport England should develop and disseminate templates and other resources to ensure maximum comparability of data across sports, and on a longitudinal basis, building on resources already available.



4. Communications with NGBs and within Sport England

- The Alliance recommends that Sport England communicate clearly with NGBs and other funded bodies about the timing and purpose of research exercises to avoid duplication and reduce 'survey fatigue'.



5. Volunteering

- This research demonstrates a growth in volunteer numbers. However, the sector has potential to work considerably more effectively in its approach to volunteers. Sport England should continue to lead these efforts across the sector;
- Best practice around volunteer recruitment and management within sport should be developed and shared – there is appetite for more support and guidance as is available through resources such as the GIVERS framework;
- Sport England to disseminate resources on engaging and communicating with volunteers and on collecting data at club and NGB levels on volunteer demographics, motivations, reasons for joining and reasons for leaving;
- Sport England should work with the wider voluntary sector to develop advice and guidance around more flexible volunteering opportunities, including micro volunteering;
- There is particular potential to develop a more compelling offer around skills based volunteering – from the club level through to national roles in sport. Clubs will need resources and guidance to do this as well as to recruit more effectively from outside of their existing networks;
- Sport England could consider applying principles (though not specific requirements) around governance to committees and management structures within clubs – with a particular focus on increasing the diversity of people undertaking board/committee level volunteering roles.



6. *Provide targeted support to attract new members/participants*

- There are capability gaps in the club sector on attracting new people and there is a need, through new resources and advice, to move more decisively beyond very traditional recruitment methods.



7. *Build financial capability*

- There are particular issues around finance in sports clubs. This should include training, advice and resources (provided both to NGBs and other funded bodies and partners, and directly to clubs on areas including):
 - Cost reduction
 - Shared services
 - Income generation and diversification
 - Developing a strong membership offer
- Clubs should be provided with detailed information on how to make the most of potential tax breaks and other advantages:
 - There is significant potential for the sector to make better use of opportunities around the zero rating for VAT purposes of new build facilities. These reliefs could be better understood and used through better support.



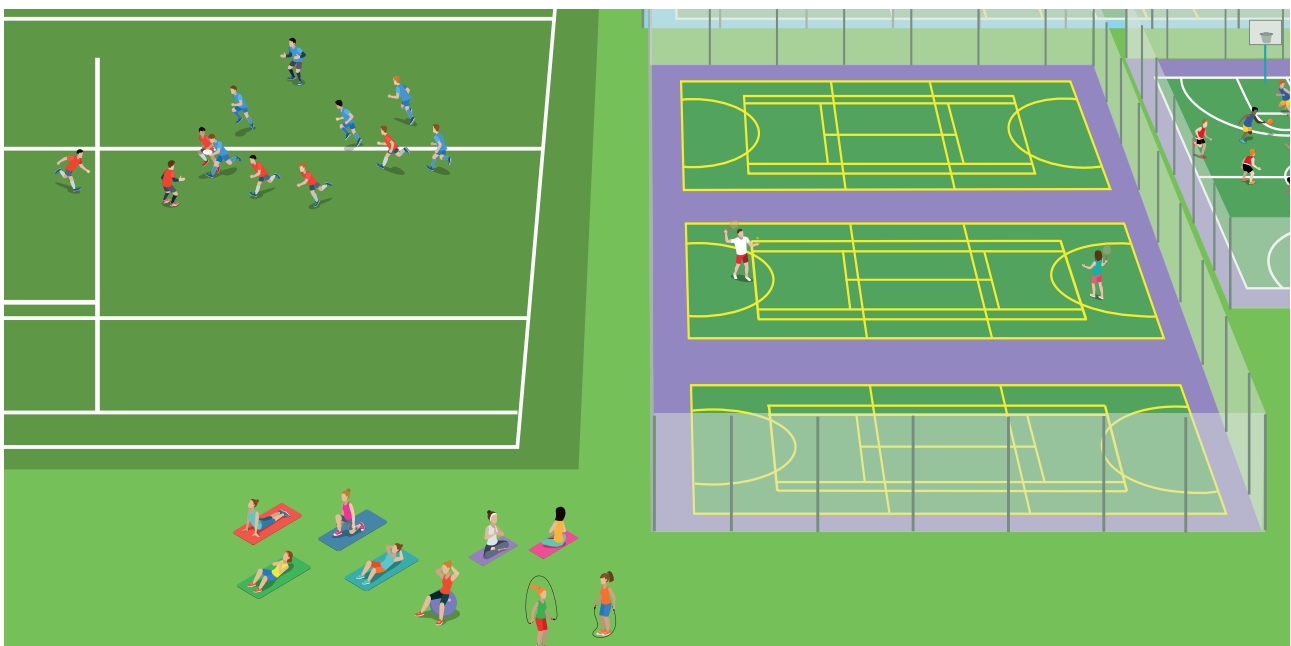
8. *Work with the sector to maximise the potential of facilities*

- Signposting and encouraging clubs both to share facilities with each other, with local community groups and with schools;
- Existing Sport England guidance around accessing existing facilities (including within schools) should be communicated and promoted more widely to clubs;
- The level of facility hiring and maintenance with local authorities leaves the club sector heavily exposed at a time of ongoing austerity in local government. To that end, Sport England should:
 - Work closely with the LGA, cCLOA and other relevant organisations to bolster support available to clubs
 - Provide resources to assist clubs in working with local government
 - Provide guidance on how clubs can effectively work with other local decision makers, e.g. health commissioners
 - Provide particular support to clubs on working with academies and free schools.

Areas for further investigation

The priority for further investigation should be achieving data from wider sources – increasing the number of responses and merging data with other datasets that Sport England own. In addition to this, the Alliance would recommend:

1. Conducting qualitative research to achieve a richer understanding of some of the more complex and subjective issues highlighted in this survey, including:
 - How to change the culture of clubs in relation to attracting new participants and volunteers
 - Understanding more around the gender dynamics of club membership – particularly in relation to disproportionate numbers of female members in non-participatory roles
 - Gaining a deeper understanding of how to offer the best quality experience for disabled and non-disabled participants to take part in sport together
2. Club Matters continues to fulfil an important role, however the format, nature and mechanism through which clubs wish to be supported needs to be understood further.
3. There are more technical and specific areas that should also be investigated further, including:
 - The need for clubs to improve their financial skills – particularly in relation to cost reduction
4. A more comprehensive exercise to fully map club data supplied by individual NGBs across the country would allow a more detailed understanding of the relative presence (or lack) of clubs across different communities. This would include a better understanding of appropriate geographic spread as well as a fuller picture of clubs mapped across IMD and other relevant datasets.



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