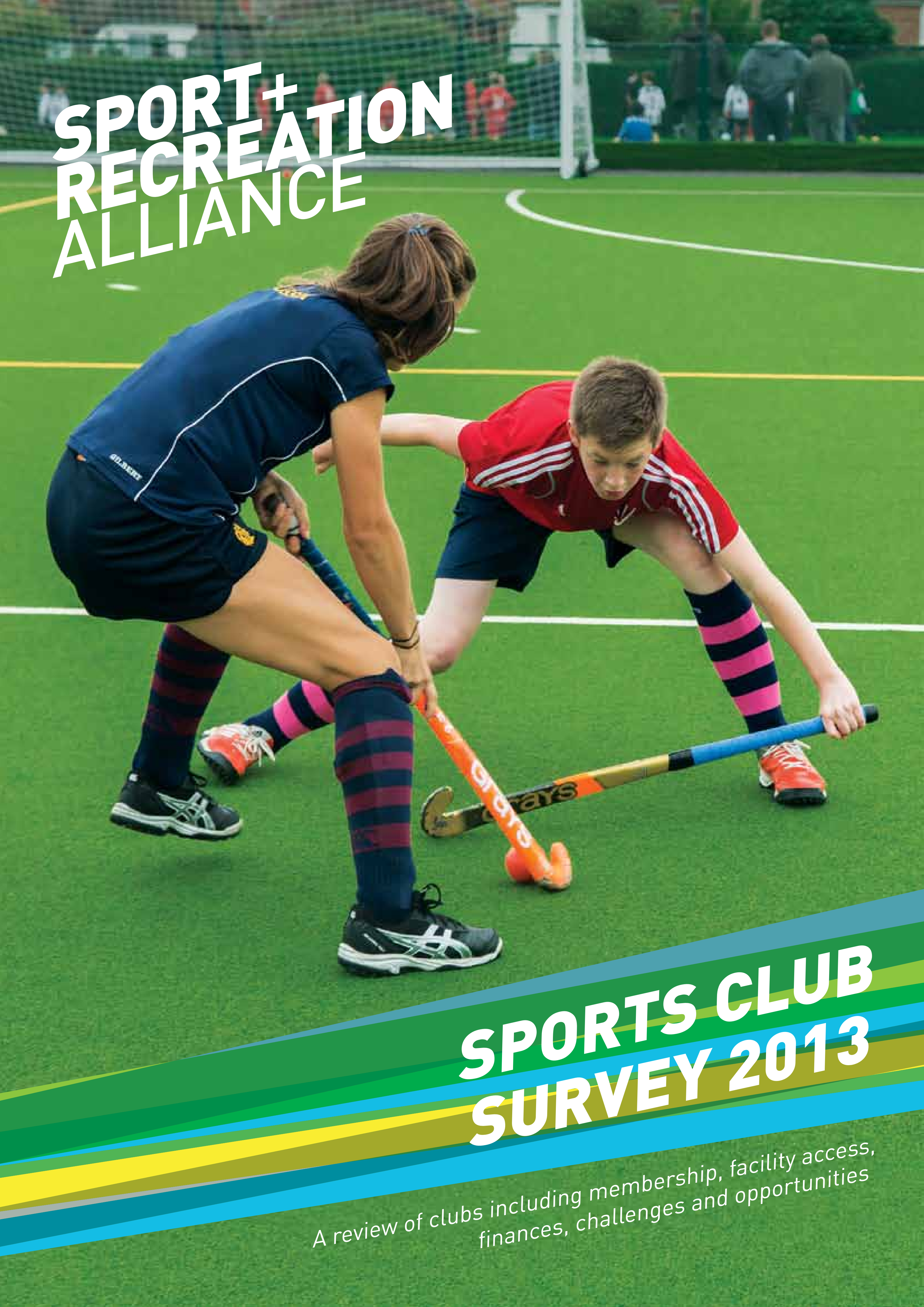


SPORT + RECREATION ALLIANCE

SPORTS CLUB SURVEY 2013

A review of clubs including membership, facility access, finances, challenges and opportunities

CONTENTS

The Sport and Recreation Alliance
The Sport and Recreation Alliance is the independent umbrella body for sport and recreation.

Almost every recognised sport and recreation activity in the UK has its own governing or representative body – organisations like The FA, The Amateur Swimming Association, British Gymnastics and The Ramblers – who exist to organise, to set rules and to encourage more people to join their activity. The Sport and Recreation Alliance is their voice.

Where there is a problem affecting our members or where there is an opportunity to promote the work they do, our job is to speak up on their behalf and to advance their interests. We also help our members become more effective by providing them with a wide range of services and expert advice.

Established in 1935 and originally named the Central Council of Physical Recreation, the Alliance exists to protect, promote and provide for its members.

This survey has been researched and written by Syann Cox and Poppy Sparham.

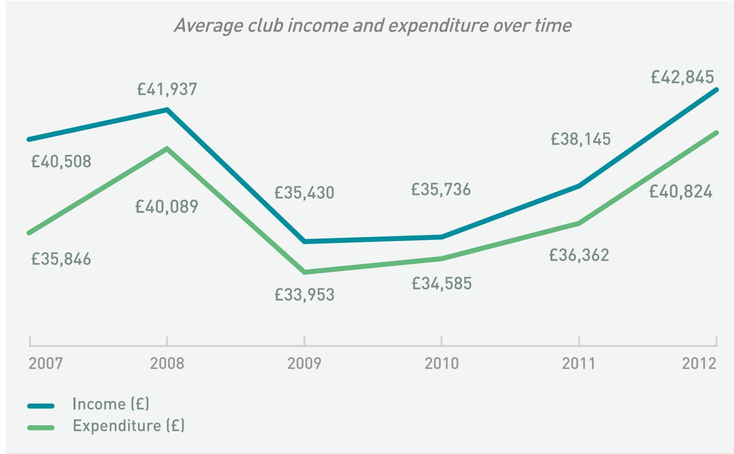
This document can be found in the research section of sportandrecreation.org.uk
This document is correct as of October 2013

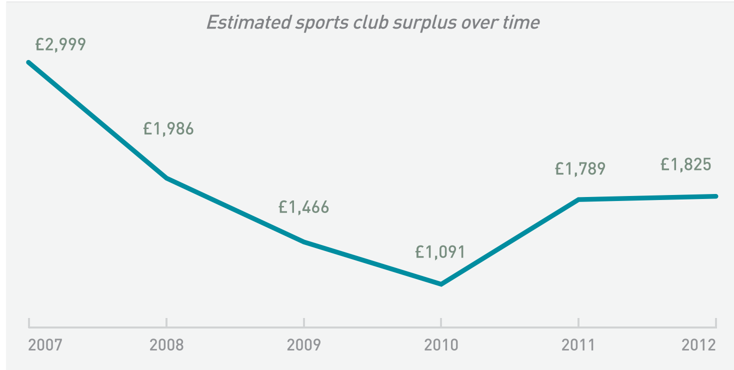
EXECUTIVE SUMMARY

FINANCES

THE AVERAGE CLUB HAS AN INCOME OF **£42,845** AND EXPENDITURE OF **£40,824**.

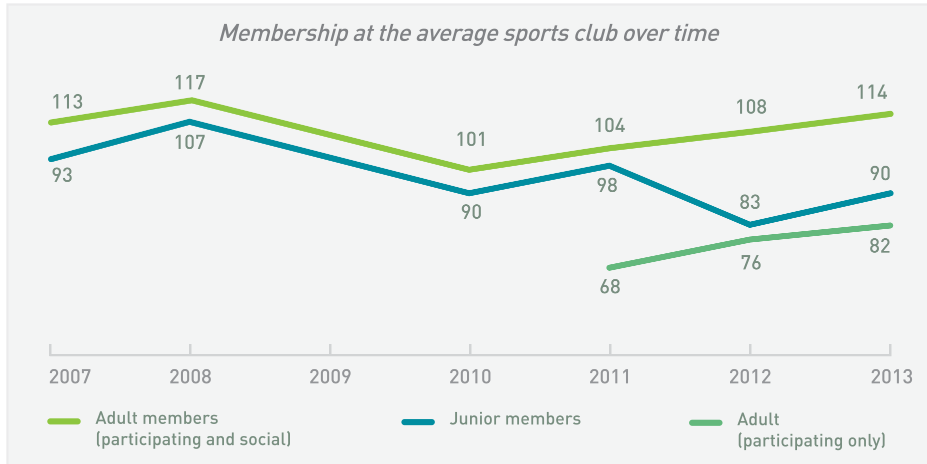
BETWEEN 2010 AND 2012 THERE HAS BEEN A **67% INCREASE** IN AVERAGE CLUB **SURPLUS** WHICH IS NOW **£1,825**, HOWEVER, THIS IS STILL **39% LOWER** THAN IT WAS IN **2007**.





MEMBERSHIP

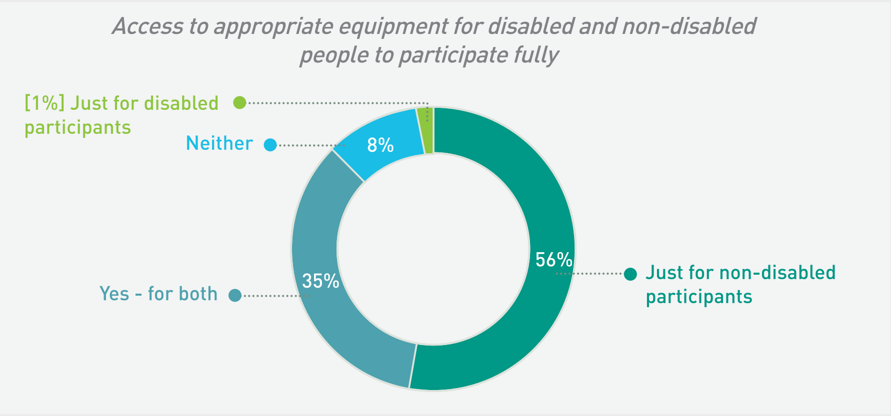
IN 2013 THE AVERAGE CLUB HAS **114** ADULT MEMBERS AND **90** JUNIORS.



PARTICIPATING ADULT MEMBERSHIPS HAVE INCREASED BY **21%** SINCE 2011, YET ONLY **ONE IN TEN** CLUBS **(13%)** SAY THEY HAVE HAD A SUSTAINED MEMBERSHIP INCREASE FOLLOWING LONDON 2012.

EQUIPMENT

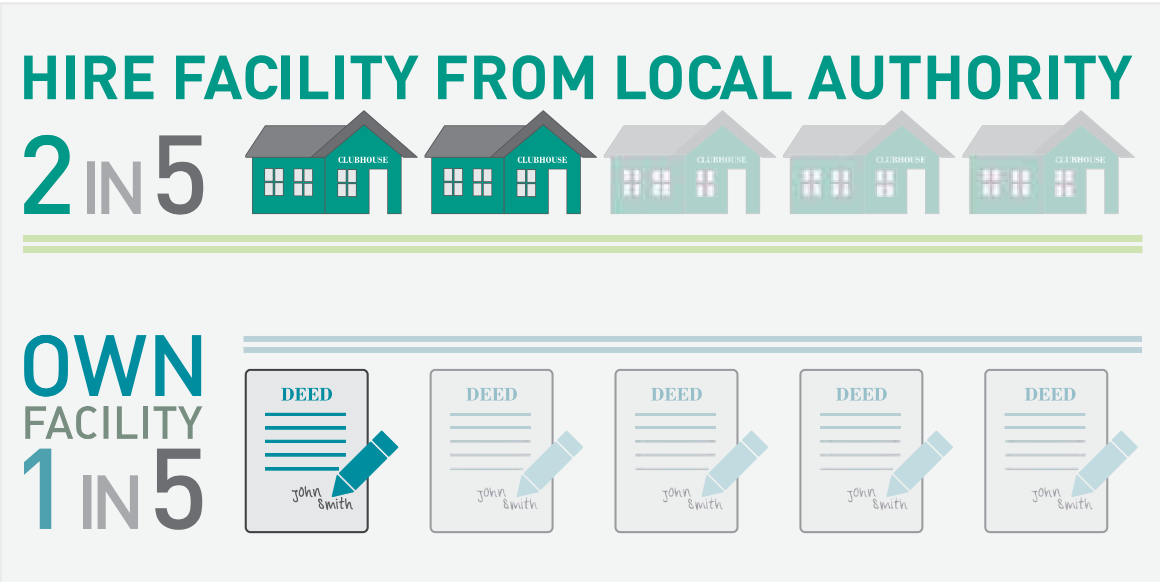
ALMOST ONE IN TEN CLUBS (8%) LACK ACCESS TO APPROPRIATE EQUIPMENT FOR MEMBERS TO PARTICIPATE FULLY IN THEIR ACTIVITY.



ONLY ONE IN THREE (35%) UK SPORTS CLUBS HAS ACCESS TO APPROPRIATE EQUIPMENT FOR BOTH DISABLED AND NON-DISABLED PEOPLE TO PARTICIPATE.

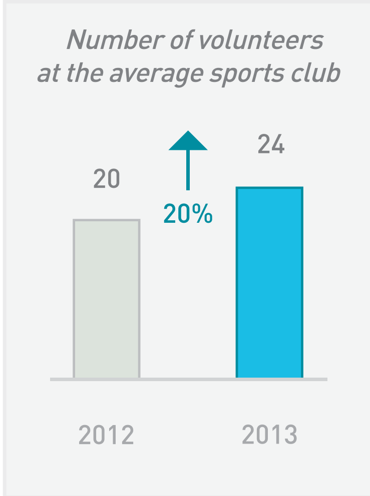
FACILITIES

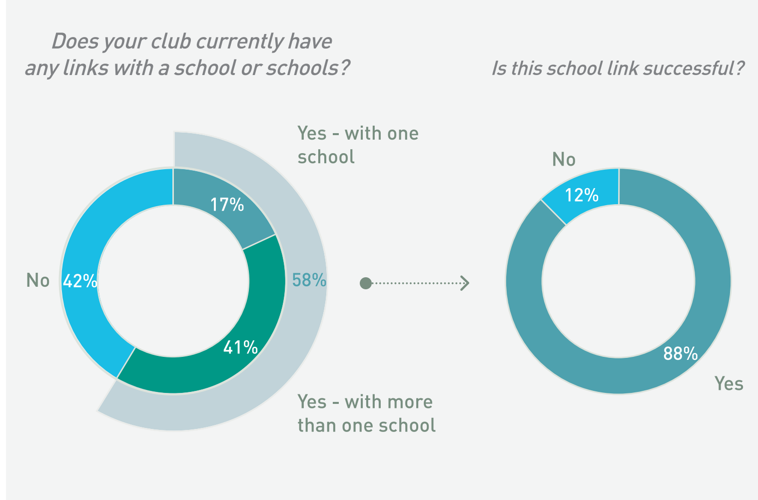
ALMOST TWO IN FIVE OF ALL CLUBS (38%) HIRE OR LEASE A FACILITY FROM THEIR LOCAL AUTHORITY WHILST ONE IN FIVE (21%) OWN THEIR FACILITY.



THIS HIGHLIGHTS THE IMPORTANCE OF LOCAL AUTHORITY FACILITY PROVISION.

VOLUNTEERS & SCHOOL LINKS





VOLUNTEERS

WITH 24 VOLUNTEERS AT THE AVERAGE CLUB IN 2013 THERE HAS BEEN A 20% INCREASE IN THE NUMBER OF VOLUNTEERS SINCE 2011.

SCHOOL LINKS

MORE THAN HALF OF THE UK'S SPORTS CLUBS (58%) ARE CURRENTLY WORKING WITH SCHOOLS AND NINE IN TEN (88%) SCHOOL-CLUB LINKS ARE REPORTED AS BEING SUCCESSFUL.

LOOKING FORWARD

FINANCES CONTINUE TO BE A CONCERN FOR CLUBS WITH 52% WORRIED ABOUT ACCESSING FUNDING IN THE NEXT TWO YEARS AND 58% ASKING FOR TRAINING AND SUPPORT IN APPLYING FOR FUNDING

54% OF CLUBS ARE OPTIMISTIC ABOUT IMPROVING THEIR FACILITIES BUT THIS ALSO REPRESENTS A CHALLENGE FOR 49% OF CLUBS WHILST 47% SEE INCREASING FACILITY COSTS AS AN UPCOMING CHALLENGE

HALF OF CLUBS (49%) ARE OPTIMISTIC ABOUT TRAINING AND DEVELOPING THEIR COACHES, STAFF OR VOLUNTEERS WHILST THREE IN TEN (31%) BELIEVE THEY MAY NOT HAVE ENOUGH COACHES TO MEET MEMBER DEMAND IN THE NEXT TWO YEARS

INTRODUCTION

Every two years the Alliance takes a look at the health of our sports clubs to inform our understanding of the sport and recreation sector and to pin down important policy areas moving forwards.

Although the idea of building a legacy began the moment London won the bid, this year we're keen to see how the set-up, finances and future focuses of sports clubs have changed following London's successful 2012 Olympic and Paralympic Games.

As well as asking about some of the same topics we covered in our 2011, 2009 and 2007 surveys, alongside the impact of the Games we've also sought out information on priority issues such as school sport, the Community Amateur Sports Club (CASC) scheme and the role of sport in providing community projects.

All of the information we gather is vital to the Alliance as it informs and shapes our policy positions and provides us with a rich data source to model the potential impact of financial changes that the sector might face.

EVERY TWO YEARS THE ALLIANCE TAKES A LOOK AT THE HEALTH OF OUR SPORTS CLUBS

Many of our members also benefit directly from this research, with national governing bodies (NGBs) offered the chance to include up to five questions to be asked of their specific sports clubs as well as the main survey.

The findings in this report are based on responses from 2,909 sports clubs across more than 100 different sports. Not all clubs answered all questions so base sizes are included throughout.

As in previous Sports Club Surveys, the data has been weighted to represent the estimated 151,000 sports clubs thought to be in existence across the UK.

Full details of our methodological approach can be found in Appendix A whilst a breakdown of the types of clubs we heard from can be found in Appendix B.

MEMBERSHIP NUMBERS

Participating adult membership levels at the average sports club are an encouraging 21% higher in 2013 than they were in 2011. In 2013, the average sports club has 82 participating adults, four of whom are disabled participants.

There are currently 90 junior members at the average club. Despite a short term increase in junior membership levels of 8.4% between 2012 and 2013, the longer term trend is one of decline.

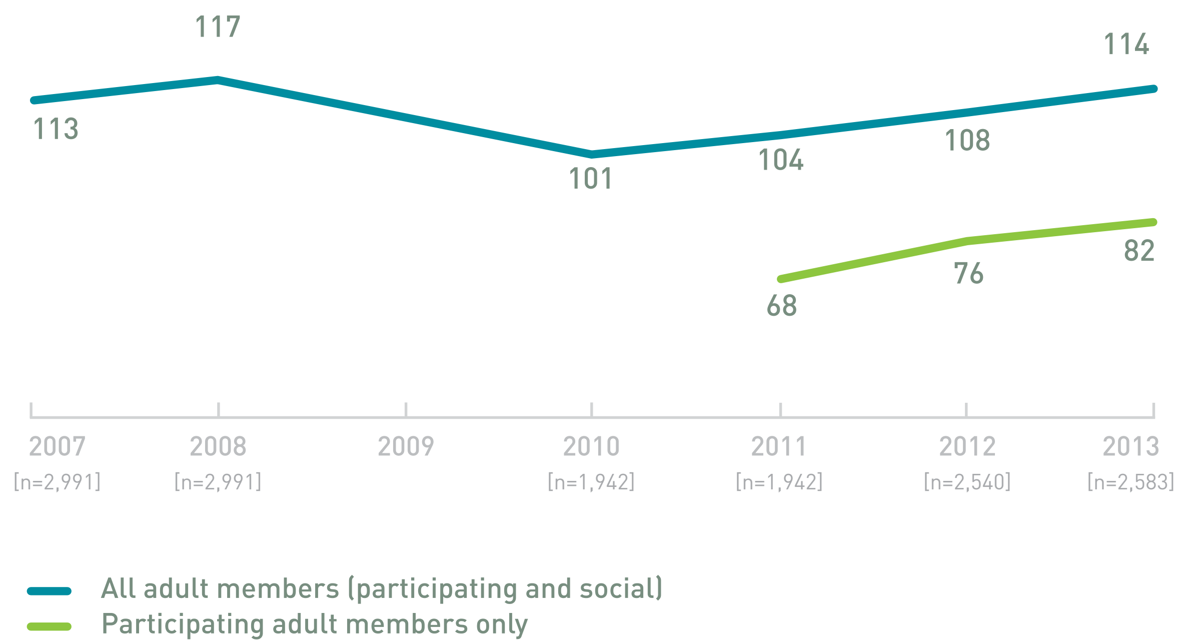
Membership growth at both participating adult and junior levels has predominantly happened in Olympic or Paralympic sports.

ADULT MEMBERSHIP (PARTICIPATING AND NON-PARTICIPATING)[1]

In the average UK sports club there are an estimated 114 adults if we include both participating and non-participating members. This is just shy of the estimated 117 adult members (participating and non-participating) seen in 2008 – the highest estimate since the Sports Club Survey began in 2007.

Following an 11.1% decrease in overall adult membership levels between 2008 and 2011, the last two years from 2011 to 2013 have seen a more positive 9.6% increase.

Adult membership at the average club over time



[1] Total level findings for adult membership are based on weighted data from 2,583 clubs in 2013 and 2,540 in 2012.

IN 2011, THE AVERAGE CLUB HAD 68 ADULT PARTICIPATING MEMBERS. THIS HAS INCREASED BY A CONSIDERABLE 20.6% TO 82 ADULT PARTICIPATING MEMBERS IN 2013

Since 2011, the Sports Club Survey has recorded participating and non-participating adult members separately. In 2011, the average club had 68 adult participating members – this has increased by a considerable 20.6% to 82 adult participating members at the average club in 2013.

Perhaps surprisingly, there has been greater growth in adult participating membership between 2011 and 2012 than around the time of the Games (between 2012 and 2013). In 2012, the average club had 76 adult participating members, an 11.8% increase on 2011, whereas the growth between 2012 and 2013 amounts to a 7.9% increase.

With an estimated 114 total adult members in 2013, almost three quarters (72%) of the average club's adult membership are participating members. At an overall level, out of the 82 adult participating members at the average club, four are disabled participants, making up 5% of the adult participating membership at the average club.

However this figure varies when we take club type into account. Disabled adult membership is naturally highest in clubs specifically for disabled people, and also in the clubs that run parallel sessions for disabled and non-disabled people.

The average club registered as a Community Amateur Sports Club (CASC) has 32% more participating adult members than non-registered clubs, with the average CASC (n=610) having 108 participating adults and 59 social or non-participating adults. This amounts to 65% of adult members at the average CASC who are participating adults, and amongst these participating adults at CASCs, 3% are disabled participants.

Higher adult membership levels within CASCs are to be expected given the criteria of the scheme – which include having an open membership and promoting participation. In light of the requirements and process of becoming a CASC, it is also likely that larger, more formalised clubs will be both eligible and able from a resource perspective to apply for CASC status.

This may also explain the larger memberships we see within CASCs. This larger structure may be a contributing factor to the slightly higher proportion of social members within CASCs, with greater support required to run the club. The community nature of CASCs could also be playing a role here, with CASCs more likely to have a bar and create an appealing offer to social members.

ADULT MEMBERSHIP LEVELS BY CLUB TYPE

When taking club type into account, mainstream clubs[2] are larger than clubs either specifically for disabled people, or specifically for non-disabled people. In the average club that runs parallel sessions for disabled people and non-disabled people (n=190), there are 123 participating adults, 11 of whom are disabled, meaning that around one in ten (9%) adult participants at these clubs are disabled.

At the average club where both disabled and non-disabled adults participate together (n=1,106), there are 102 adult participating members, three of whom are disabled, making up 3% of their adult participating membership. This shows that clubs which offer specific sessions for disabled people in an inclusive way have three times as many disabled adult participants in relation to their overall membership levels.

Clubs offering parallel sessions are also more likely to have disabled members. Amongst clubs that provide opportunities where disabled and non-disabled people take part in their activity together, in 2013, two in five (43%) have no disabled adult members compared to 28% of clubs which offer parallel sessions.

Interestingly, one in four (26%) clubs which offer opportunities for participation together currently have no disabled members at all, either adults or juniors. This is compared to just under one in ten (9%) clubs who offer parallel sessions.

Although we can't establish from our survey data why this is, research conducted by the English Federation of Disability Sport EFDS (2013) amongst disabled people in relation to their participation habits indicates that there is a disconnect between the number of people who say they would like to take part in sessions where people participate together and those who are actually doing so.

Although 64% of their respondents expressed an interest in doing so, only 51% actually were. It may therefore be that clubs running parallel sessions are able to promote these better or are better resourced to support disabled participation given that they run separate sessions.

Alternatively, there may be additional barriers to participation in clubs offering participation together, possibly in terms of the opportunities that are available to people across a wide range of disabilities or the knowledge within these clubs to make activities truly inclusive.

2 In this report, mainstream clubs are defined as those which provide opportunities where disabled and non-disabled people participate together, or provide specific, or parallel sessions for disabled people alongside sessions for non-disabled people.

There may also be other external factors at play, such as the location of the club and demand in the local area. It is also worth bearing in mind that clubs running parallel sessions are likely to be able to cater better for elite pathway development, and that the focus and therefore appeal of these clubs may be different to clubs offering sessions together.

In sports clubs that are specifically for disabled people (n=52) there are 38 adult participating members. This is lower than in the average UK club by more than half, but only slightly lower than the 52 adult participating members at the average club which provides specifically for non-disabled people (n=926).

These smaller membership sizes amongst clubs with specific memberships, and the larger membership sizes amongst mainstream clubs suggest that a certain club size or structure may be necessary in order for the club to be able to open its activities to all, and that the very nature of a wider offer will result in more members.

This is further reinforced by the fact that mainstream clubs are more likely to own their facilities than clubs specifically for disabled or non-disabled people.

Almost one in four clubs that provide opportunities for disabled and non-disabled participation together (24%, n=1,156) and clubs providing parallel sessions (23%, n=175) own their facilities compared to 16% and 7% of clubs specifically for non-disabled (n=880) and disabled people (n=52) respectively.

This higher frequency of facility ownership probably ensures greater flexibility as to when these clubs can run sessions, and how many members they can accommodate at any one time.

Within mainstream clubs however, there are fewer volunteers or employees per member than in clubs specifically for disabled or non-disabled people.

The average club offering opportunities for participation together has ten members to each volunteer/employee and clubs running parallel sessions for disabled and non-disabled participants have eight members to each volunteer/employee.

This is compared to three members to one volunteer/employee in clubs specifically for disabled people and a six to one ratio in clubs specifically for non-disabled people.

This suggests that mainstream clubs may be limited in their ability to grow their memberships by much more in the future unless they can also grow their number of volunteers or paid staff.

Adult participating members by club type (2013)

Club type	Average number of participating adult members	Average number of disabled adult members	Average % of adult participants that are disabled
All clubs	82	4	5%
Base	2,583	1,213	
Clubs currently with one or more adult participants	92	4	4%
Base	2,292	1,213	
Clubs specifically for non-disabled people	52	-	-
Base	926	-	
Clubs specifically for disabled people	38	-	-
Base	52	-	
Clubs that provide opportunities to take part together	102	3	3%
Base	1,106	945	
Clubs that provide parallel sessions	123	11	9%
Base	190	138	
Don't know/ Not sure	65	0[0.27]	0%
Base	203	129	

ADULT MEMBERSHIP LEVELS BY SPORT

The five sports with the highest overall participating adult membership levels can be characterised by the types of facilities they use.

With 387 participating adult members at the average golf club (n=12), 314 at the average snowsports club (n=26), 308 at the average angling club (n=70), 249 at the average motor sports club (n=25) and 176 at the average sailing club (n=45), we see the highest memberships where activities predominantly take place in large, open spaces where more members are able to share the space without compromising on the sporting experience.

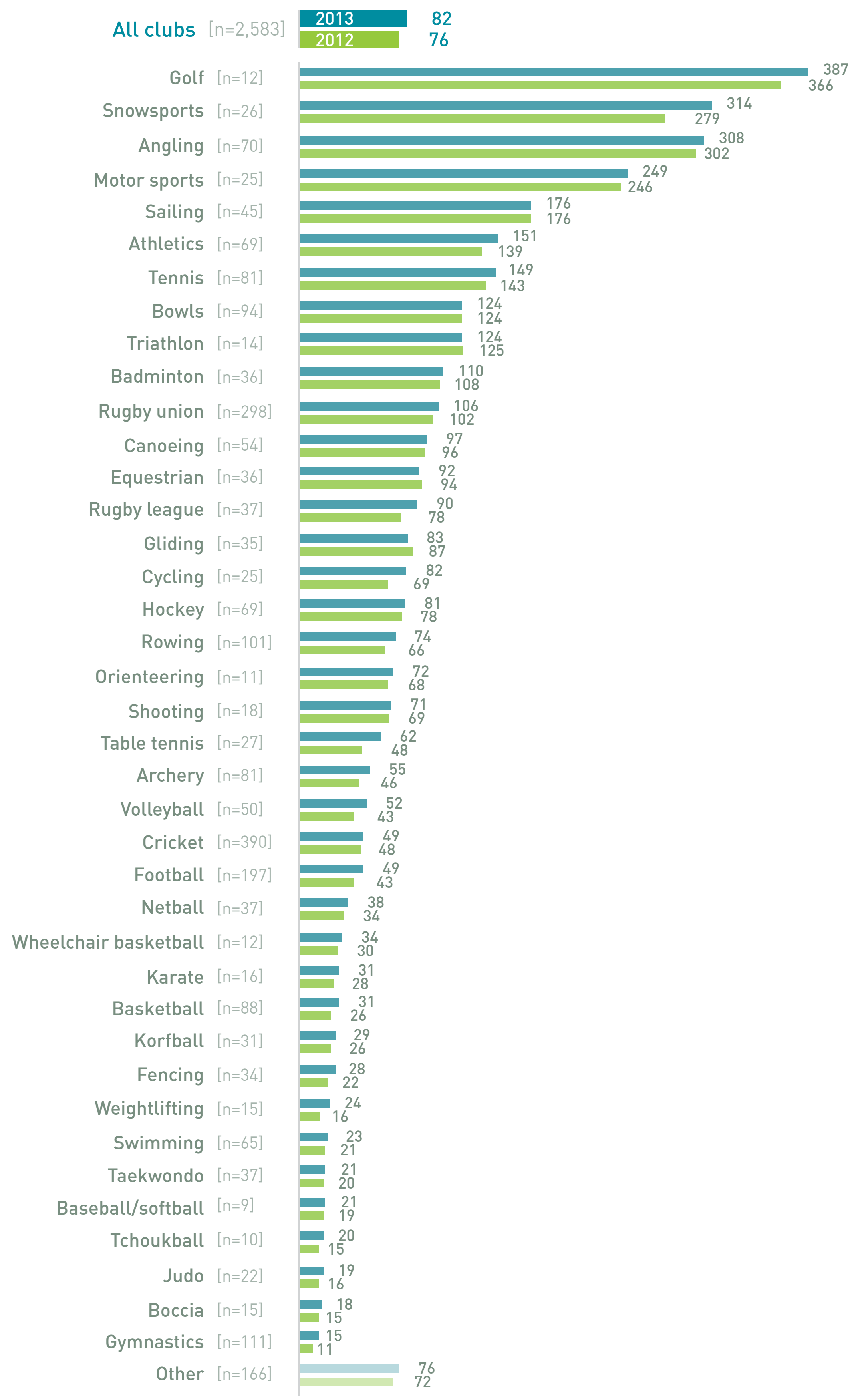
Sports with the lowest levels of participating adult members tend to be either those in which the majority of members are juniors – such as gymnastics, swimming and judo, or sports which are relatively new (gaining popularity from around the 1980's onwards) such as tchoukball or boccia.

However, although adult participating membership levels are lower here than in the average UK club, some of these sports have seen increases in adult participants between 2012 and 2013 that are higher than the 8% increase seen across all UK clubs over this time.

The average gymnastics club (n=111) has seen a 35% increase in adult membership between 2012 and 2013, the average tchoukball club (n=10) a 27% increase, judo (n=22) a 20% increase and boccia (n=15) a 17% increase.

This growth should be treated with some caution given a smaller change will have a larger impact where participating adult memberships are low, but it does show growth amongst these sports.

Average participating adult membership numbers by sport



As to be expected given the strong overall trend for participating adult membership growth, on a sport by sport basis, 35 out of 40 sports report an increase in average participating adult membership numbers between 2012 and 2013.

The greatest increases have been seen in weightlifting with the average club increasing its adult participating membership by 45% (n=15), gymnastics (n=111) as already noted at 35%, and table tennis (n=27) where the average club has seen a 29% increase in adult participating members.

Interestingly, these are all sports which competed in the London 2012 Olympic Games.

In fact, nine of the ten sports with the highest increases in adult participants are Olympic sports. The only non-Olympic sport is Tchoukball – a relatively new sport with its NGB founded in 2002, which has been making concerted efforts to grow in recent years.

Highest increases in adult participating members by sport

Base	Sport	2012	2013	% increase
15	Weightlifting	16	24	45%
111	Gymnastics	11	15	35%
27	Table tennis	48	62	29%
34	Fencing	22	28	27%
10	Tchoukball	15	20	27%
50	Volleyball	43	52	22%
88	Basketball	26	31	20%
22	Judo	16	19	20%
25	Cycling	69	82	19%
81	Archery	46	55	18%

In the three sports in which adult participating membership hasn't increased, memberships have either remained steady (sailing n=45 and bowls n=94), or the decrease has only been very small at between one and five per cent (triathlon n=14, equestrian n=36, gliding n=35).

Over the last two years, in contrast to participating adult membership, social or non-participating adult memberships have declined slightly from 36 non-participating members in 2011 to 33 at the average club in 2013.

It isn't possible to tell from our data what's prompted this and whether the overall trend is that these non-participating members have left the club altogether or become participating members.

Fees for adult social members have not increased in recent years, remaining at a low £13 a year at the average club. This would suggest that social membership is not reducing because of increasing financial pressures.

With 33 non-participating adult members at the average swimming club (n=65) compared to 23 participating members, when including both types of adult members the overall adult membership of swimming clubs increases considerably.

Although it may seem high that 59% of adults at the average swimming club do not participate, given that there are 163 junior members at the average swimming club, this is likely to consist of parents, volunteers, officials and coaches. This ensures that in training, participants are safe and well supervised, and that at events they are marshalled by enough people.

In this wider context, only 15% of the members at an average swimming club are non-participating adults. A similar scenario is occurring at the average gymnastics club (n=111) where 45% of their adult membership are non-participating but in the context of 252 junior members this accounts for only 4% of their total membership.

Within the average rugby union club (n=298), we also see that more than half (55%) of adults are non-participating members. In this instance although there are again large junior membership levels, the sport of rugby also tends to have a very social ethos which may be influencing this.

Rugby clubs are also more likely to own, part own, or long term lease their facilities with seven in ten (71%) owning, part owning or long term leasing their facility and 17% using multiple facilities with two thirds of these clubs owning as well (n=278).

As a result, nine in ten (90%) rugby clubs have access to a bar and six in ten (60%) have access to a non-bar social area allowing them to maximise on providing social events and activities for non-participating members alongside generating club income.

It may be for this reason that non-participating adults account for 29% of the total membership in the average rugby union club. Although it's likely that some of these members will take an active role in looking after junior members, others may be involved predominantly for the social side, perhaps because they are ex-players.

A similar scenario may be occurring in cricket clubs (n=390) which again have large numbers of junior members but where non-participating adults account for 28% of their total membership.

These examples demonstrate that many sports clubs play a wider role in our communities than just offering chances to participate, creating a social environment and also opportunities to help children develop and progress.

They also show how, through drawing on resources within the community, sports clubs can deliver their activities safely and effectively.

JUNIOR MEMBERSHIP[3]

THE ESTIMATED NUMBER OF JUNIORS IN 2013 AT THE AVERAGE UK SPORTS CLUB IS 90

The picture for junior membership[4] is more varied. The estimated number of juniors in 2013 at the average UK sports club is 90. At an overall average club level, three of these 90 junior members are disabled participants.

Again at the average CASC (n=611) we see that membership levels are higher than the UK average, this time by 43% with 127 junior members at the average CASC – 2% of whom are disabled participants.

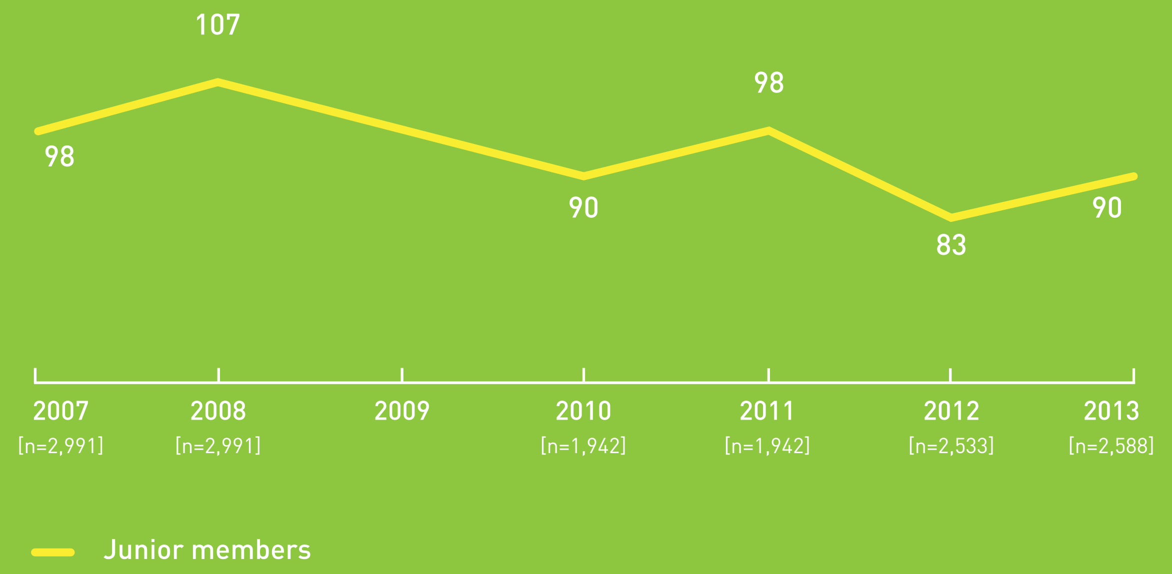
Whilst at an overall level there has been an increase of 8.4% on 2012 figures when the average club had 83 junior members; in comparison to our highest recorded levels in 2008 (107 junior members), there has been a 15.9% decrease in junior membership levels.

It is in stark contrast to the 11.8% participating adult membership growth seen between 2011 and 2012 that we see a 15.3% decrease in junior membership over the same time.

[3] Total level findings for junior membership are based on weighted data from 2,588 clubs in 2013 and 2,533 in 2012.

[4] Junior membership is defined differently across sports. Half of sports clubs (51%) define junior membership as those aged 18 and younger, whilst a quarter (25%) define them as under 16 and one in ten (11%) define them as between 19 and 21. Junior membership data in this survey refers to juniors as defined by each individual club.

Junior membership at the average club over time



Since 2007, junior memberships have fluctuated. The two-year period between 2008 and 2010 showed a 15.9% decline. Since 2010 there has been an 8-9% increase followed by a 15-16% decrease every other year. This pattern suggests declining membership over time as the extent of the decreases is greater than the increases occurring.

What remains to be seen is whether the 8.4% increase seen between 2012 and 2013 marks the beginning of an upward trend, or if we can expect to see around a 15-16% decline again in the next year. Data from the 2015 Sports Club Survey will provide important insight in this area and help address the question of whether we have inspired a generation through the London 2012 Olympic and Paralympic Games.

This year-on-year variation in junior membership levels is difficult to understand from our data and not helped by an absence of robust data over time on participation levels amongst children. Department for Culture, Media and Sport (DCMS) data from the latest Taking Part Survey (2012/13) also shows that amongst all children (aged 5-15 years) the participation rate in any sport in the four weeks prior to interview had decreased from 91% in 2008/09 to 88% in 2012/13.

In terms of participation outside of school in the week prior to the interview, this data again shows a significant decrease over this time period for 5-10 year olds (down from 75% in 2008/09 to 67% in 2012/13) and no significant change for 11-15 year olds – 89% of whom participated in sport outside of school in the week prior to interview[5].

[5] DCMS (2013) Taking Part 2012/13: *Annual Child Release.*

Given that the Taking Part data indicates higher participation levels amongst older children, a possible hypothesis is that there is a natural ebb and flow in junior memberships created from older children losing interest and younger children becoming old enough to express an interest and begin participating.

It is also plausible that capacity issues amongst clubs may prevent junior members joining at certain times.

JUNIOR MEMBERSHIP LEVELS BY CLUB TYPE

With regards to junior membership, again we see that mainstream clubs have the highest number of members. In particular with 181 junior members, the average club providing parallel sessions (n=190) has double the amount of junior members than the average UK club. One in 20 (6%) of these juniors are currently disabled participants.

As with adult disabled participants, clubs running parallel sessions have three times as many disabled junior participants than those who offer opportunities to participate together. Clubs that provide these opportunities (n=1,216) have an average of 92 junior members, 2% of whom are disabled participants.

In contrast, the average club specifically for disabled people (n=52) has only 14 junior members whilst the average club specifically for non-disabled people (n=927) has 77 junior members suggesting that there may be barriers to participation for disabled juniors, or that resources may be an issue in clubs specifically for disabled people.

Similar to adult participation, two in five (42%) clubs offering opportunities for participation together do not have any disabled junior participants currently, compared to just over one in four (26%) of clubs which run parallel sessions.

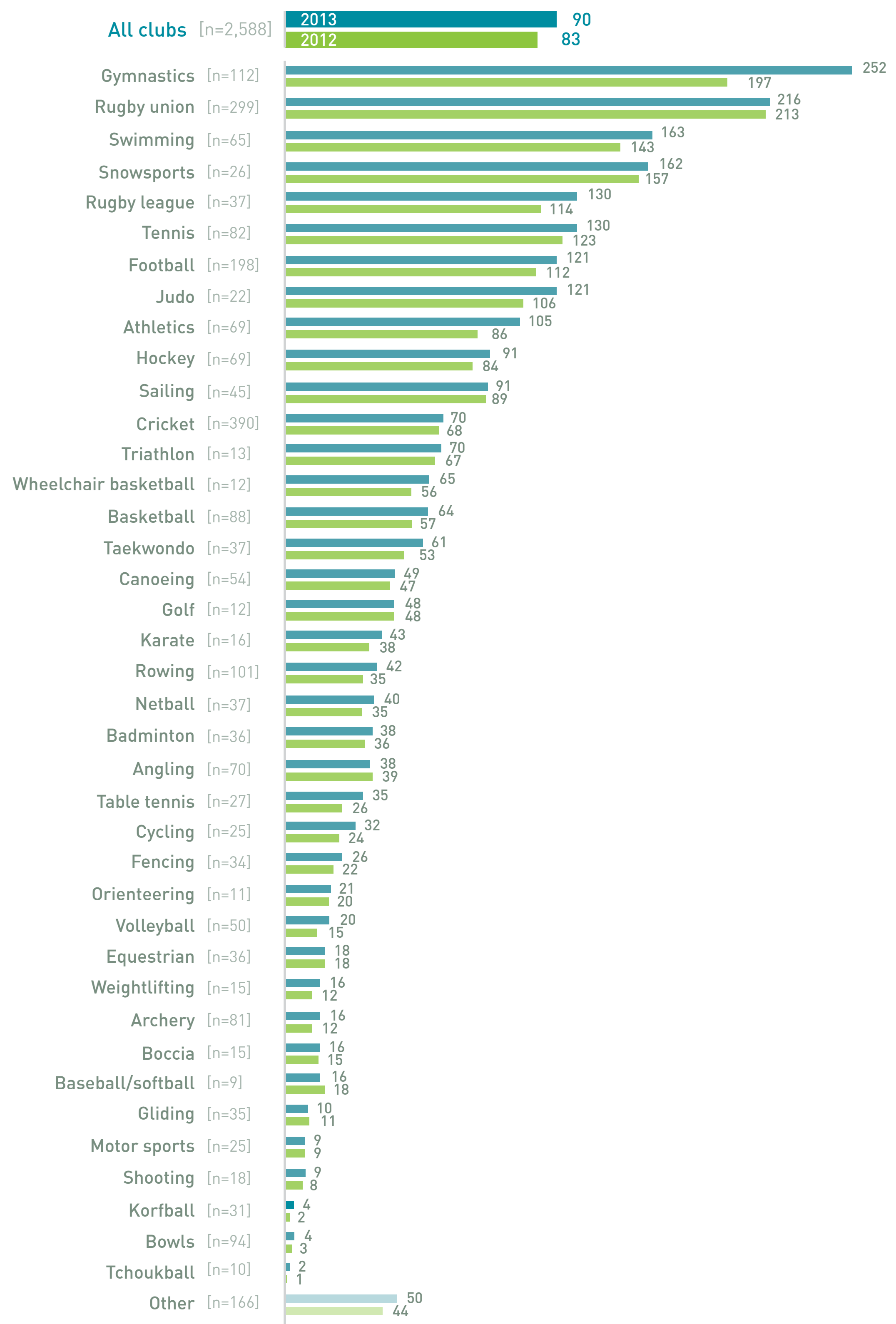
Junior members by club type (2013)

Club type	Average number of junior members	Average number of disabled junior members	Average % of junior membership that are disabled
All clubs	90	3	3%
Base	2,588	1,201	-
Clubs currently with one or more junior participants	109	3	3%
Base	2,142	1,201	-
Clubs specifically for non-disabled people	77	-	-
Base	927	-	-
Clubs specifically for disabled people	14	-	-
Base	52	-	-
Clubs that provide opportunities to take part together	92	2	2%
Base	1,216	940	-
Clubs that provide parallel sessions	181	10	6%
Base	190	151	-
Don't know/ Not sure	68	0[0.2]	0%
Base	203	110	-

JUNIOR MEMBERSHIP LEVELS BY SPORT

As would be expected given their appeal and suitability for young people, the highest average levels of junior membership are found within gymnastics (252 junior members at the average club, n=112), rugby union (216 junior members at the average club, n=299) and swimming (163 junior members at the average club, n=65).

Average participating junior membership numbers by sport



In the last year, all but three sports have experienced some growth in their junior membership levels, the exceptions being golf (n=12), where junior membership has remained static, angling (n=70), where there has been a 43% decline at the average club, gliding (n=35) where the average club has 9% fewer junior members in 2013 than 2012 and baseball/softball (n=9) where junior members have reduced by 11%.

Amongst clubs with the largest junior membership growth, korfball (n=31), and tchoukball (n=10) have a small number of junior members but have both doubled their junior members between 2012 and 2013 to four, and 2 junior members at the average club respectively.

Aside from these sports, with the exception of bowls (a 30% increase in the number of junior members, n=94) the highest levels of junior membership growth have occurred in sports which were included in the London 2012 Olympic and Paralympic Games.

The average table tennis club (n=27) and volleyball club (n=50) have both seen a 35% increase in junior membership levels in the last year whilst junior members have increased by 34% in the average archery club (n=81) and 32% in the average weightlifting club (n=15).

The average cycling club (n=25) has 31% more juniors in 2013 than 2012 whilst the average gymnastics club (n=112) has 28% more. The average club in both athletics (n=69) and rowing (n=101) have seen a 21% increase in the number of junior members and shooting (n=18) and fencing (n=34) 18% and 17% respectively.

Highest increases in junior members by sport

Base	Sport	2012	2013	% increase
31	Korfball	2	4	96%
10	Tchoukball	1	2	85%
27	Table tennis	26	35	35%
50	Volleyball	15	20	35%
81	Archery	12	16	34%
15	Weightlifting	12	16	32%
25	Cycling	24	32	31%
94	Bowls	3	4	30%
112	Gymnastics	197	252	28%
69	Athletics	86	105	21%

THE LONDON 2012 OLYMPIC AND PARALYMPIC GAMES[6]

There already exists a wide range of research aiming to assess the impact the London 2012 Games had on participation, the economy and in leaving a wider legacy – but a definitive answer is yet to be found.

Whilst our membership figures data is largely positive and shows that the growth between March/April/May 2012 and March/April/May 2013 has occurred most within Olympic and Paralympic sports, sports clubs are not reporting a noticeable impact in membership levels directly after the Games.

In some instances, participation has been on an upward trend prior to the Games, and arguably the legacy began in 2005 when the bid was won. In other instances, clubs are unwilling to associate any apparent increases in membership with the Games.

Drawing on Active People data, evaluations of the Games frequently cite that since we won the bid in 2005, 1.4 million more people are now playing sport once a week. This equates to 15.3 million people participating in total (35.2%) in 2012/13 compared to 13.9 million in 2005/06 (34.2%).

However, the highest participation figures recorded by the Active People survey were between October 2011 and October 2012 when just over 15.5 million people were participating (36.0%), and the biggest increase in participation (1.6%) was seen between the first Active People survey in 2005/06 and the second in 2007/08[7].

The statement that 1.4 million more people are now playing sport once a week whilst true, does not necessarily convey the entire picture, with this data demonstrating that although there has been an overall positive trend in participation, there has also been some degree of variation in participant levels, and we have not necessarily seen a peak in relation to the Games.

The latest Sports Club Survey membership figures show that there has been growth in both adult (5.6%) and junior (8.4%) memberships between March/April/May 2012 and March/April/May 2013, and that this growth has predominantly happened in Olympic and Paralympic sports. The longer term picture however is less positive with adult and junior membership levels lower now than they were in 2008.

[6] Total level findings for the impact of the Games are based on weighted data from 2,461 clubs.

[7] Sport England (2013), *Active People 7*, Q2 data.

In addition, when asked directly what happened to club membership levels during or following the Games, only one in ten (13%) told us that their membership had increased directly after the Games, and that most of these members had remained.

This is comparable with the 12% of British people who said that the London 2012 Olympics inspired them to take up a new sport or recreation activity, and similarly the 14% who say that they have increased the amount of time spent being physically active since the Games[8].

However, amongst clubs that run parallel sessions (n=182), two in ten (22%) saw an increase that has been sustained with increases across both their disabled and non-disabled members.

Of the clubs that reported a sustained increase in members (n=321), 85% are Olympic or Paralympic sports and there seems to be greater evidence for inspiring the younger generation with more new junior members than adults.

The average of these clubs has 94 participating adult members in 2013, with 13 of these joining directly following the Games and one (8%) of these new adult members being disabled participants.

This Games related increase means that the average of these clubs has 12 more adult participants than the overall UK average club.

[8] YouGov (2013), *'Olympics'*.

Junior membership levels are 15 members higher than in the average UK club, with 105 junior members in 2013, 23 of whom joined directly following the Games and two (9%) of whom are disabled participants.

These findings show that memberships have increased following the Games predominantly in sports that were featured in London 2012 and that only a small proportion of new members are disabled. On average, clubs that have benefited had similar membership levels to the average UK club prior to this Games related boost.

At the average club running parallel sessions and reporting a sustained increase after the Games (n=41), there are 85 participating adults –12 of whom joined after the Games with four of these (33%) being disabled participants.

With 209 junior members at the average of these clubs, junior membership is considerably higher than the UK average club's 90 junior members. These clubs report an average of 20 juniors joining following the Games, with six (30%) of these being disabled participants.

JUNIOR MEMBERSHIP LEVELS ARE 15 MEMBERS HIGHER THAN IN THE AVERAGE UK CLUB, WITH 105 JUNIOR MEMBERS IN 2013, 23 OF WHOM JOINED DIRECTLY FOLLOWING THE GAMES

This indicates that their larger junior memberships existed prior to a Games related surge and that their participating adult memberships were smaller pre-Games and are now on a par with the UK average club.

Clubs offering parallel sessions appear to have attracted higher proportions of disabled members following the Games, but again the majority of new members are non-disabled people.

Conversely, two in five (41%) clubs told us that their membership didn't increase noticeably after the Games, although this was as high as 61% in clubs specifically for disabled people (n=47).

Amongst all clubs that reported no noticeable increase (n=1,006) when looking at their membership figures, 42% experienced no change in their participating adult or junior membership levels between 2012 and 2013 compared to 48% who saw an increase in both.

Amongst clubs with increases in adult participating members who said that the Games had no noticeable impact on membership levels (n=442), one third (33%) experienced membership growth of 10% or less, just over a third (36%) an increase of between 11% and 20% and the remaining 31% growth of more than 21%.

This suggests that for around seven in ten clubs which said the Games had no noticeable impact (n=1,006), adult participating membership growth was minimal.

For around three in ten, membership increased by more than 11% but that was not felt by these clubs to be a noticeable change, suggesting this is a rate of growth they have been experiencing for some time or that perhaps occurred prior to the Games.

For clubs which stated that there was no noticeable impact from the Games but with membership figures showing an increase in junior members between 2012 and 2013 (n=360) – one in four (25%) saw their junior membership increase by less than 10%, one in three (32%) by between 11% and 20%, and two in five (43%) by more than 20%.

Although higher proportions of clubs have seen greater membership increases amongst their juniors, fewer clubs which answered 'no noticeable increase' saw a change in their junior membership.

These figures again equate to just under three in ten clubs stating 'no noticeable impact' (n=1,006) seeing an increase of more than 10% in their junior membership levels, which their answer would indicate was to be expected and not related to the Games.

These membership figures, demonstrating the actual changes occurring in clubs which believed the Games to have no noticeable impact, reinforce their statement with the majority experiencing no, or little change, and a small proportion experiencing membership increases which they do not feel is attributable to the Games.

This is perhaps because it reflects a steady rate of growth they've been experiencing over a longer period, due to the timing of growth, or other external factors which may have allowed them to increase membership figures.

This suggests that for many clubs the benefits of the Games have genuinely not been felt.

One in five clubs (21%) didn't feel able to summarise changes around membership given the seasonal nature of their sport and the times of year at which they recruit members, highlighting one of the methodological difficulties with trying to quantify the impact of the Games.

Somewhat surprisingly, a further one in five clubs (21%) told us that none of the answer options we posed to them applied[9].

Follow-up research with those who stated 'none of the above' revealed that many clubs which chose this answer did not feel comfortable associating their answer with the Games.

The most common reasons for this were that they were either not an Olympic or Paralympic sport, or had been implementing their own initiatives to drive up participation, although many other reasons were provided relating to changes in facility access and provision, coach availability and so on.

Around a quarter (23%) of responses indicated that their answer genuinely fell into the 'none of the above' category, for example because the club was newly established or undergoing significant change at the time, or knew that changes in membership were based on relationships with local schools or other organisations.

Amongst clubs which answered 'none of the above' (n=511), just under half (49%) saw some increase in their membership numbers (both adult participating and junior members) whilst two in five (39%) saw no change at all and just over one in ten (12%) had decreases in both.

A considerable 77% of clubs which chose to answer none of the above but had increases in their junior members (n=213) have had an increase of 11% or higher in their junior memberships between 2012 and 2013 with a similar 76% of those with increases in participating adults (n=224) seeing more than an 11% increase in adult participating members.

These figures mean that around three in ten clubs which answered 'none of the above' saw an increase in junior membership (32%) and adult participating membership (30%) in 2013 that was greater than a 10% increase on 2012.

[9] The answer options provided for this question were, 'our membership increased directly after the Games and most of these new members have remained at the club', 'our membership increased directly after the Games but most of these new members have since left the club', 'our membership didn't increase noticeably after the Games', 'our membership decreased noticeably after the Games', 'we're a seasonal sport so it's hard to say', 'none of the above' and a 'don't know' option.

Combined with the additional feedback from clubs in this category, this would suggest that answers given here are a combination of other external factors making it impossible to isolate the impact of the Games, or that in fact, there was no noticeable increase after the Games.

Many clubs within this answer appear to have interpreted this last statement as suggesting causality with the Games, instead choosing to say 'none of the above' to convey that any increases they experienced were unrelated to the Games.

This reluctance to make an association with the Games has been a surprising finding but is a subjective opinion from the perspective of the club and does not capture the motivation behind individuals joining.

These arguments also simplify the ways in which the Games may have brought about participation benefits as improvements to facilities, or the training of new coaches for example which ultimately led to more participants, may have been possible due to funding made available as a result of the Games.

What this does highlight however, is that for one in five clubs, the idea of a legacy is not well received and they do not believe it to be in existence, regardless of any changes or otherwise to their membership levels.

FOR ONE IN FIVE CLUBS, THE IDEA OF A LEGACY IS NOT WELL RECEIVED AND THEY DO NOT BELIEVE IT TO BE IN EXISTENCE

SECTION 04

FINANCES

FINANCES

Since 2009 club income has risen for three years in a row – the average club now has an income of £42,845. However, over the two years from 2010 to 2012 expenditure has grown at broadly the same rate as income, now standing at £40,824.

Average club surplus over the same time has increased by 67% and is now £1,825. Positive as this is, average club surplus remains 39% lower than it was in 2007 and nearly nine in ten clubs (84%) have been actively trying to reduce expenditure or increase income in the last year.

As in 2010, just under half of UK clubs (48%) are running at a surplus but encouragingly the number of clubs breaking even has risen from 23% to 28% whilst those at a deficit have dropped from 28% to 24%.

INCOME AND EXPENDITURE[10]

Average club income has increased to £42,845 in 2012[11], an increase of £4,700 (12%) on 2011 and an increase of £7,109 (20%) over two years from £35,736 in 2010. Encouragingly this means that club income has risen three years in a row from 2009, reversing a drop in average club income seen between 2008 and 2009.

Nine in ten sports clubs which responded to the survey are not for profit clubs and therefore are likely to need to cover their yearly expenditure costs from their income and will reinvest any excess of income over expenditure in the club (n=2900).

Five per cent of the clubs responding were incorporated companies and may, although not necessarily, aim to generate a profit (n=2900). Over four out of five clubs (84%) have taken at least one measure in the past 12 months to increase income or decrease expenditure and these measures tended to focus on increasing income rather than limiting their expenditure, so that the focus is around growth.

[10] Total level findings for 2012 income and expenditure are based on weighted data from 1,582 and 1,593 clubs respectively. Total level findings for 2011 income and expenditure are based on weighted data from 1,309 and 1,321 clubs respectively.

[11] The years asked about in the survey relate to the club's last full financial year and the one before this. These are assumed to be 2012 and 2011 respectively for the 2013 Sports Club Survey, either as calendar years or financial years. Where clubs provided a date for the end of their last financial year end, for eight out of ten clubs this included expenditure in 2012 suggesting that in the majority of instances this assumption is appropriate.

CLUB EXPENDITURE HAS RISEN THREE YEARS IN A ROW FROM 2009

Over the past two years expenditure has grown at broadly the same rate as income with average club expenditure at £40,824 (1,593) in 2012, an increase of £4,462 (12%) on 2011 and an increase of £6,239 (18%) on 2010.

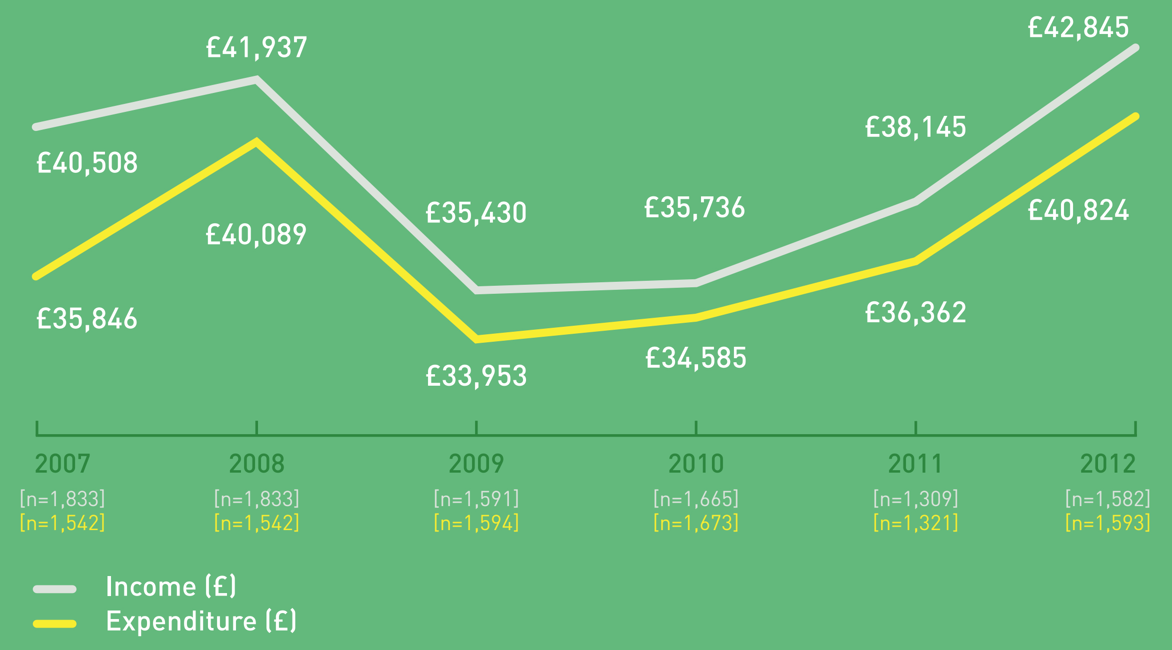
As with income, club expenditure has risen three years in a row from 2009, reversing a drop in average club expenditure between 2008 and 2009. The close relationship between expenditure and income suggests that clubs are able to increase their income to meet increased costs, be these from additional members, or increasing running costs.

However looking at the picture over the last five years to 2012, income has increased by 6% while expenditure has increased by 14%, showing that clubs are still not as financially healthy as they were in 2007 before the UK economic recession.

There is a large amount of variation in average annual expenditure between sports. The highest average club expenditure is found at golf clubs £400,748 (n=8)[12].

[12] The base sizes for these results are small and therefore should be seen as indicative.

Annual income and expenditure at the average sports club over time



Although the base size for golf clubs is small, this result is consistent with previous Sport and Recreation Alliance Sports Club Surveys where golf clubs have had the highest expenditure and income, underlining the more commercial model of many golf clubs and the greater expenses of maintaining large golf courses.

The next highest levels of average club expenditure are from rugby union clubs £124,743 (n=122), gliding clubs £96,929 (n=27), gymnastics clubs £87,496 (n=56) and swimming clubs £72,848 (n=47).

Gliding and rugby union clubs are more likely to own or long term lease their facilities, and less likely to hire than the average club and therefore facility ownership may be contributing to the increased expenditure here.

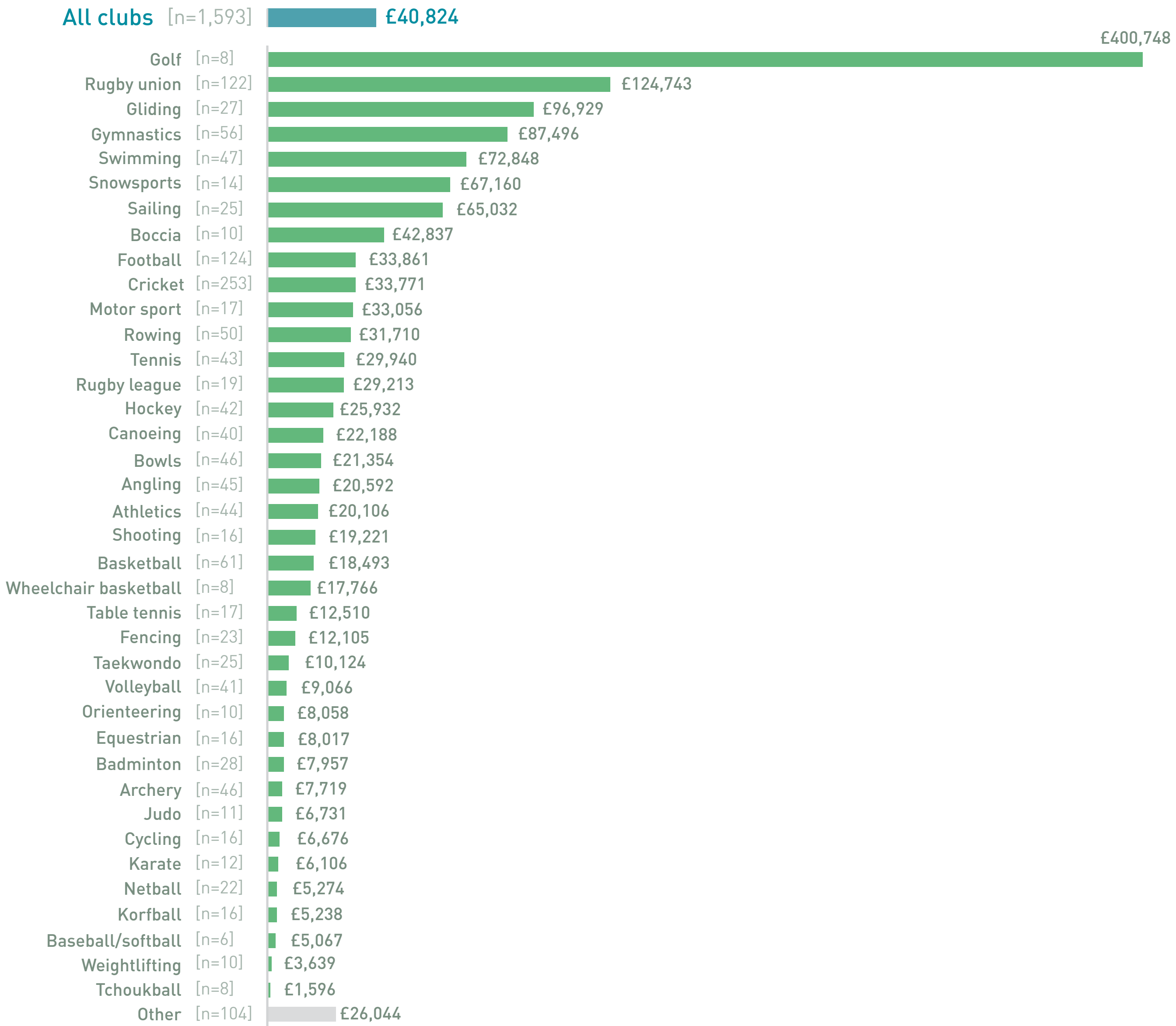
Looking at money spent in the club on hiring facilities in 2012, the average annual amount spent on hiring at swimming clubs £37,992 (n=41) and gymnastics clubs £10,349 (n=45) is above the all club average £5,224 (n=992) and this will increase average overall expenditure. Both these sports are also likely to want access to facilities multiple times a week.

Additionally swimming, gymnastics and rugby union clubs are the top three sports included in the survey for average junior membership size. This means that expenditure is likely to be higher because junior members are more likely to require a greater number of sessions, coaches and equipment.

The lowest average club expenditure is at tchoukball clubs £1,596 (n=8), weightlifting clubs £3,639 (n=10), baseball/softball clubs £5,067 (n=6) and korfball clubs £5,238 (n=16). These sports have lower average numbers of junior and adult participating members than the averages for all clubs and this may be one of the factors contributing to lower average club expenditure.

JUNIOR MEMBERS ARE MORE LIKELY TO REQUIRE A GREATER NUMBER OF SESSIONS, COACHES AND EQUIPMENT

Average annual club expenditure in 2012 by sport



As with expenditure there is a large amount of variation in annual income between clubs of different sports.

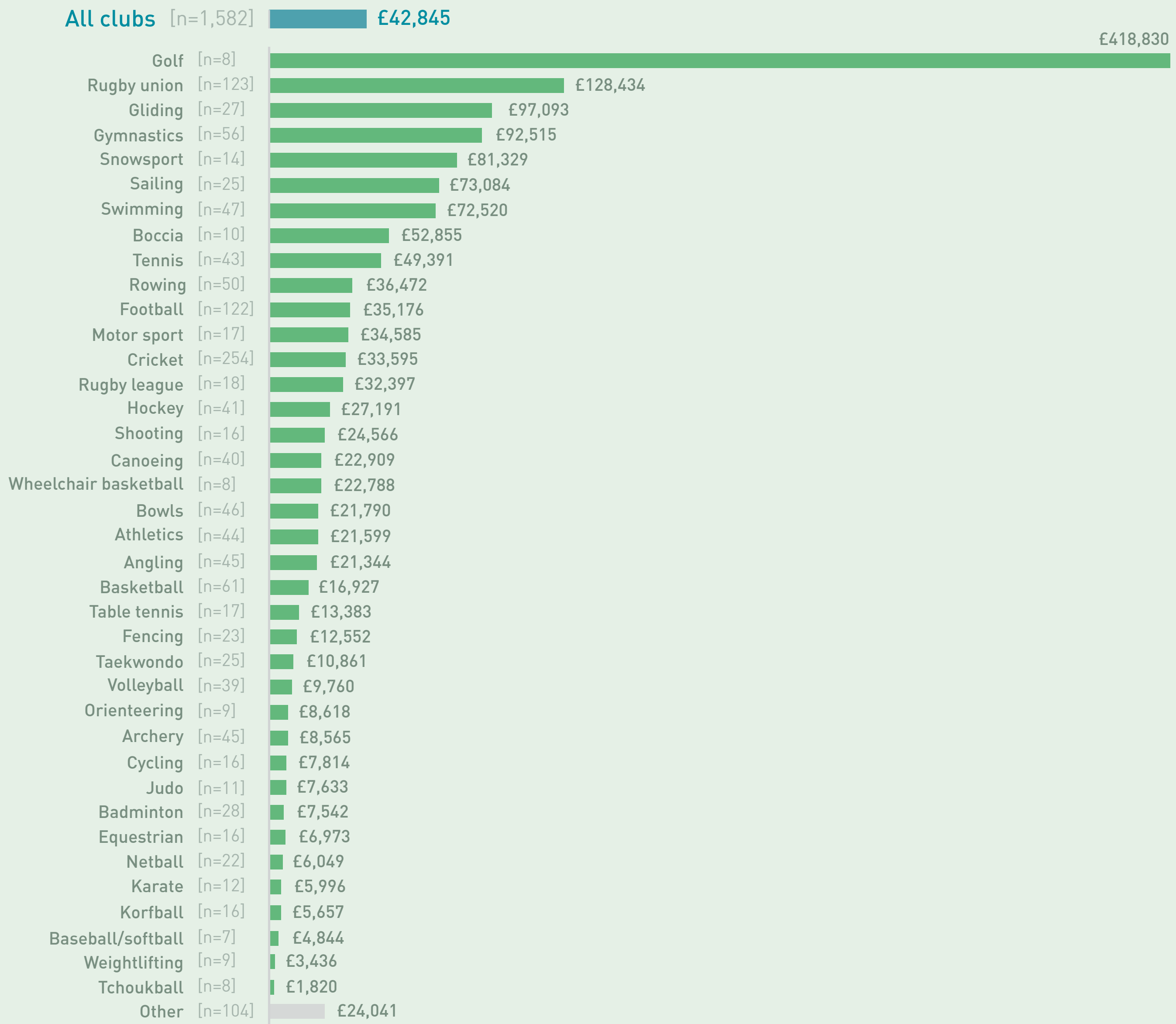
Again we see that the clubs with the highest average incomes are golf clubs £418,830 (n=8), rugby union clubs £128,434 (n=123), gliding clubs £97,093 (n=27) and gymnastics clubs £92,515 (n=56).

These sports all have higher than average annual expenditure, so their income needs to be higher to cover these costs.

High income levels here relate to the average golf club and average gliding club having annual membership fees well above the average for all clubs and rugby union and gymnastics clubs having the largest average junior membership sizes of all sports covered in the survey, meaning a greater volume of fee income.

In line with their lower expenditure, the sports with the lowest average incomes are tchoukball clubs £1,820 (n=8), weightlifting clubs £3,436 (n=9) and korfball clubs £5,657 (n=16). This also corresponds to these clubs' lower membership numbers.

Average annual club income in 2012 by sport



CLUBS IN SURPLUS, DEFICIT AND BREAKING EVEN[13]

Looking at club income less expenditure to give an indication of long term sustainability, 48% of clubs are in surplus (that is, their income exceeds their expenditure) with 24% of clubs in deficit and the remaining 28% of clubs breaking even[14] (n=1,615).

This is an improvement on 2010 where 28% of clubs were operating at a deficit and there has been a corresponding increase in the number of clubs now breaking even which has risen from 23% in 2010 to 28% in 2012.

These figures show, in conjunction with the expenditure and income figures themselves that overall there has been an improvement for club finances in the two years to 2012. However it remains concerning that nearly one in four clubs (24%) had expenditure which exceeded their income in 2012.

For some clubs this could simply be because a one off capital investment has been made in year which gives the appearance of a deficit in 2012 and does not indicate that the club's finances are unsustainable.

However, as a measure of long term sustainability it is likely that some clubs are still struggling financially, which is reflected by the 41% of clubs which said that the financial sustainability of the club was a challenge they were currently concerned with or likely to face in the next two years (n=1,949).

The average club surplus across all clubs has risen from £1,091 in 2010, to £1,825 (n=1,580) in 2012 – an increase of £734 (67%). Again mirroring the trend in finances discussed above, this shows an improvement in the past few years but remains 39% lower than the average club surplus in 2007 of £2,999.

The average surplus in clubs which are in surplus is £5,801 (n=770) showing that for nearly half of all clubs, there is a reasonable buffer between their income and expenses. The average deficit amount in clubs which are in deficit is £4,047 (n=392) showing that for almost one in four clubs spending is unsustainable at current levels.

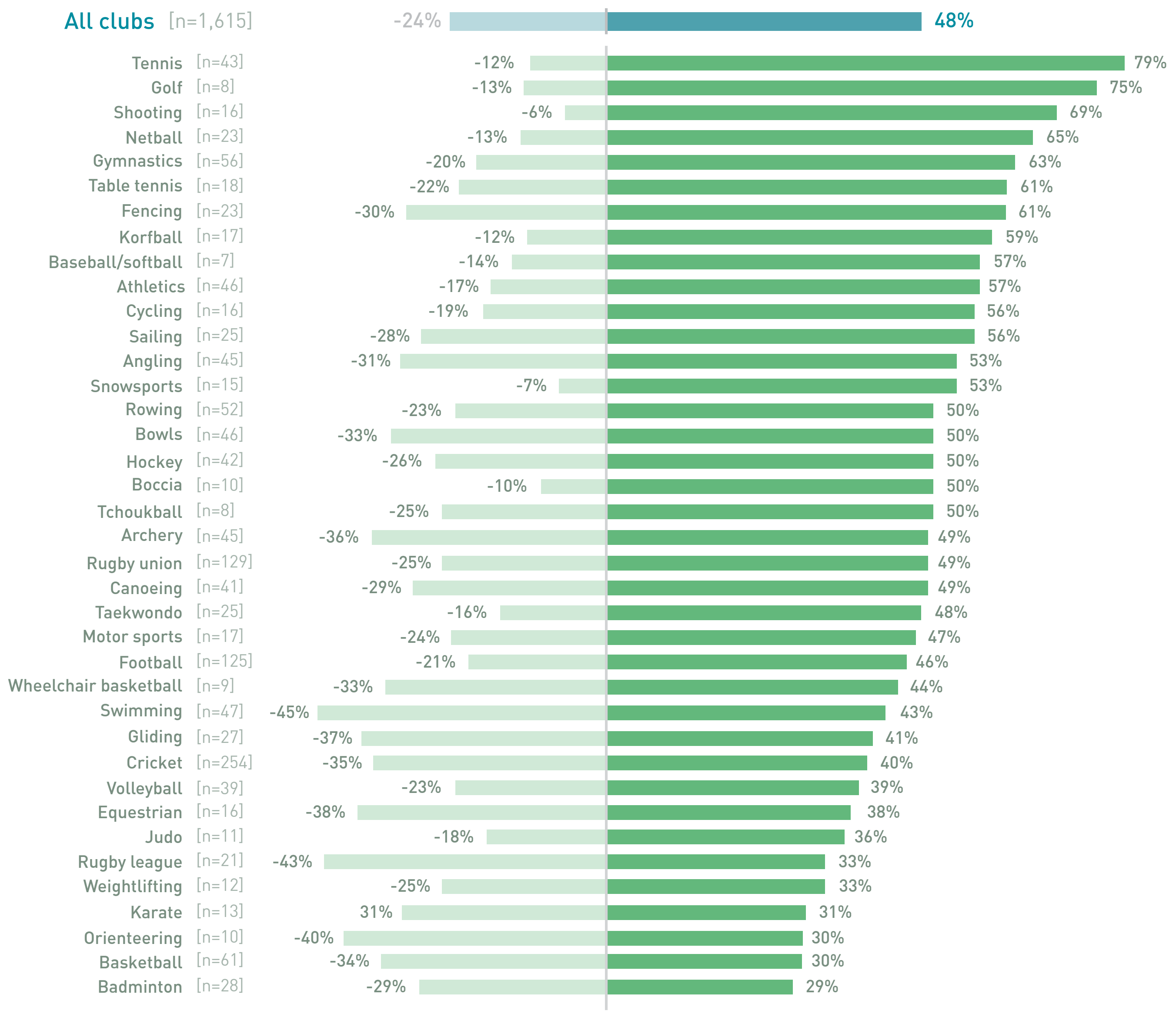
13 Surplus findings are calculated only from clubs which gave both income and expenditure data. In 2012 this was 1,580 clubs, in 2011 it was 1,308 clubs.

14 These figures are calculated by subtracting expenditure from income, therefore the figures do not take into account a club's savings from previous years. Break-even is defined as having a difference between income and expenditure of between -£200 or +£200.

Sports where the highest proportion of clubs had income exceeding expenditure in 2012, thus creating a surplus in year, are tennis 79% (n=43) and golf 75% (n=8).

Sports with the highest proportion of clubs with expenditure exceeding income in 2012, thus creating a deficit in year, were swimming/aquatics/diving 45% (n=47) and rugby league 43% (n=21).

Percentage of clubs in surplus and deficit by sport (2012)



MANAGING INCOME AND EXPENDITURE [15]

The picture of club finances from annual income and expenditure should be viewed in the context of measures clubs have taken in the past 12 months to increase their income or decrease their expenditure. Nearly nine in ten (84%) of clubs have taken at least one measure to increase income or decrease expenditure.

The top five measures taken all relate to increasing club income: increasing club fundraising efforts (49%), applying for additional funding (45%), actively recruiting more members (44%), holding more social events (40%) and increasing membership fees (34%).

This shows that clubs are focusing on increasing their income rather than limiting their expenditure and that this focus is around growth. This may be because clubs feel there is less scope to control costs, that there are better opportunities for increasing income or that they are focused on offering the best experience and increasing participation.

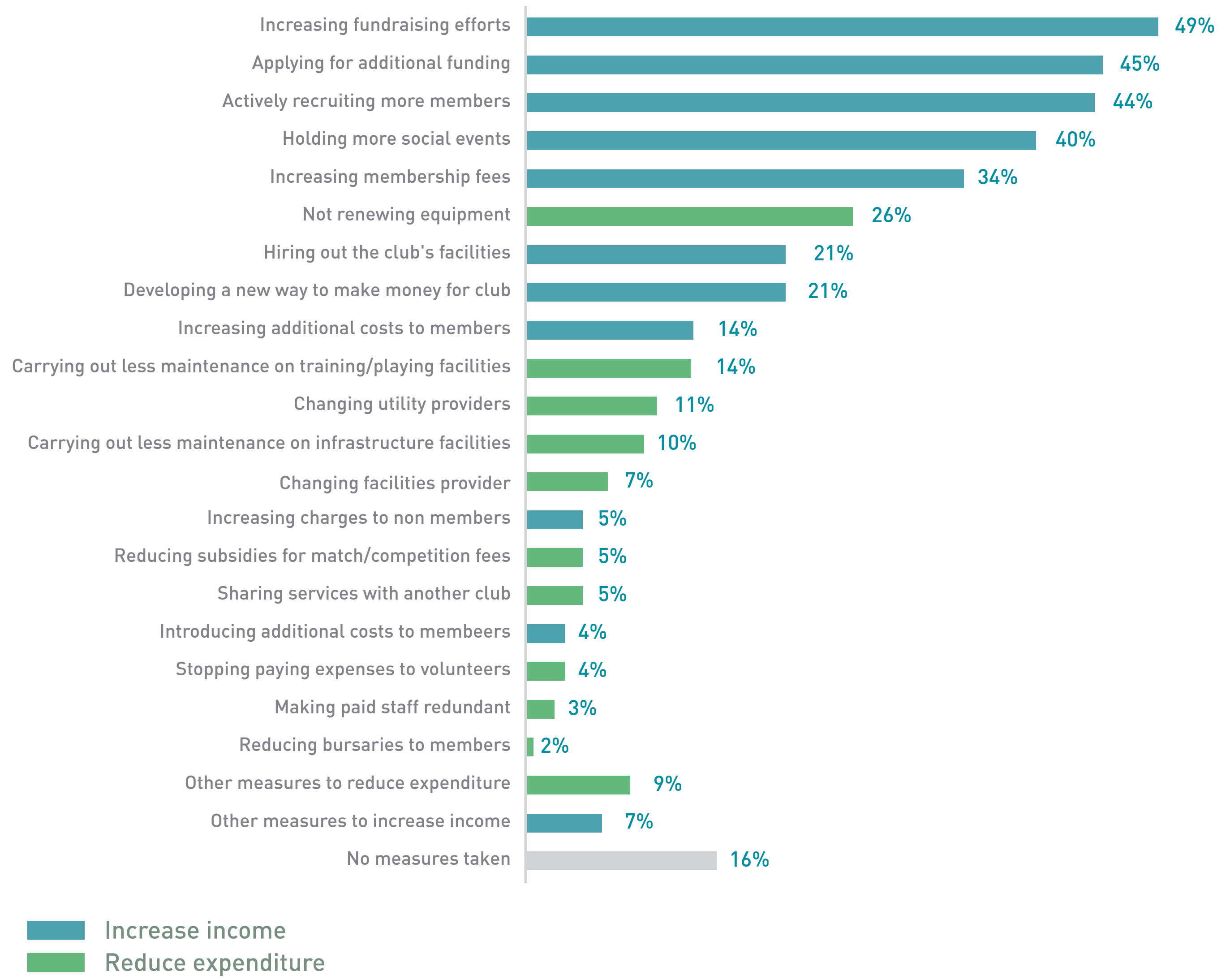
The top measure for decreasing expenditure was the club not renewing equipment – taken by 26% of clubs. This is potentially a concerning figure as it is not a sustainable measure and may damage what clubs are able to offer in the future if they no longer have appropriate equipment for members to participate. This in turn may reduce the club's appeal and membership levels, thus creating a drop in income from membership fees.

Of those clubs which said that they had taken at least one measure in the past year to either limit club expenditure or increase club income, three quarters (76%, n=1,589) had taken three or more different measures. This shows that many clubs are attempting to increase income or decrease expenditure by a number of different means.

Only 16% of clubs stated that they had not taken any specific measures to increase income or reduce expenditure in the past 12 months. This could be for a number of reasons, including that the club feels its current finances are sustainable without taking any specific measures.

[15] Measures taken by clubs to increase income or reduce expenditure are based on weighed data from 1,882 clubs.

Measures taken to actively increase club income or reduce club expenditure in the last 12 months



Note: Clubs could select all answers which applied, therefore totals do not sum to 100% [n=1,882]

MEMBERSHIP FEES [16]

Around one third of clubs (34%) said that in the last year they had taken the measure of increasing membership fees in order to increase club income. Despite this, the extent of membership fee growth has been limited over the past five years. At the average club the annual membership fee for adult participating members in 2013 is £78. This is an increase of £5 (7%) on 2012 when the fee was £73.

For the average club, the participating adult annual membership fee has increased by only £8 (11%) between 2008 and 2013. The annual membership fee for junior members at the average sports club in 2013 is £46, an increase of £2 (5%) on 2012. This sees the junior membership fee returning to similar levels to 2007 when it was £47, having risen to £50 in 2010 and £52 in 2011[17].

The fluctuation in the junior annual membership fee reflects the fluctuation in the average club's junior membership numbers and this could show that clubs are reducing their membership fees to attract more junior members.

The membership fee for non-participating adult members at the average club in 2013 is £14 (n=2,008) against £13 in 2012 (n=1,977), showing that there has been little change in social membership fees in the last year.

As in previous Sports Club Surveys the sport where the average club has the highest participating adult membership fee is golf £549 (n=12). This is likely to reflect the associated costs of facilities and the fact that many golf clubs run as commercial businesses.

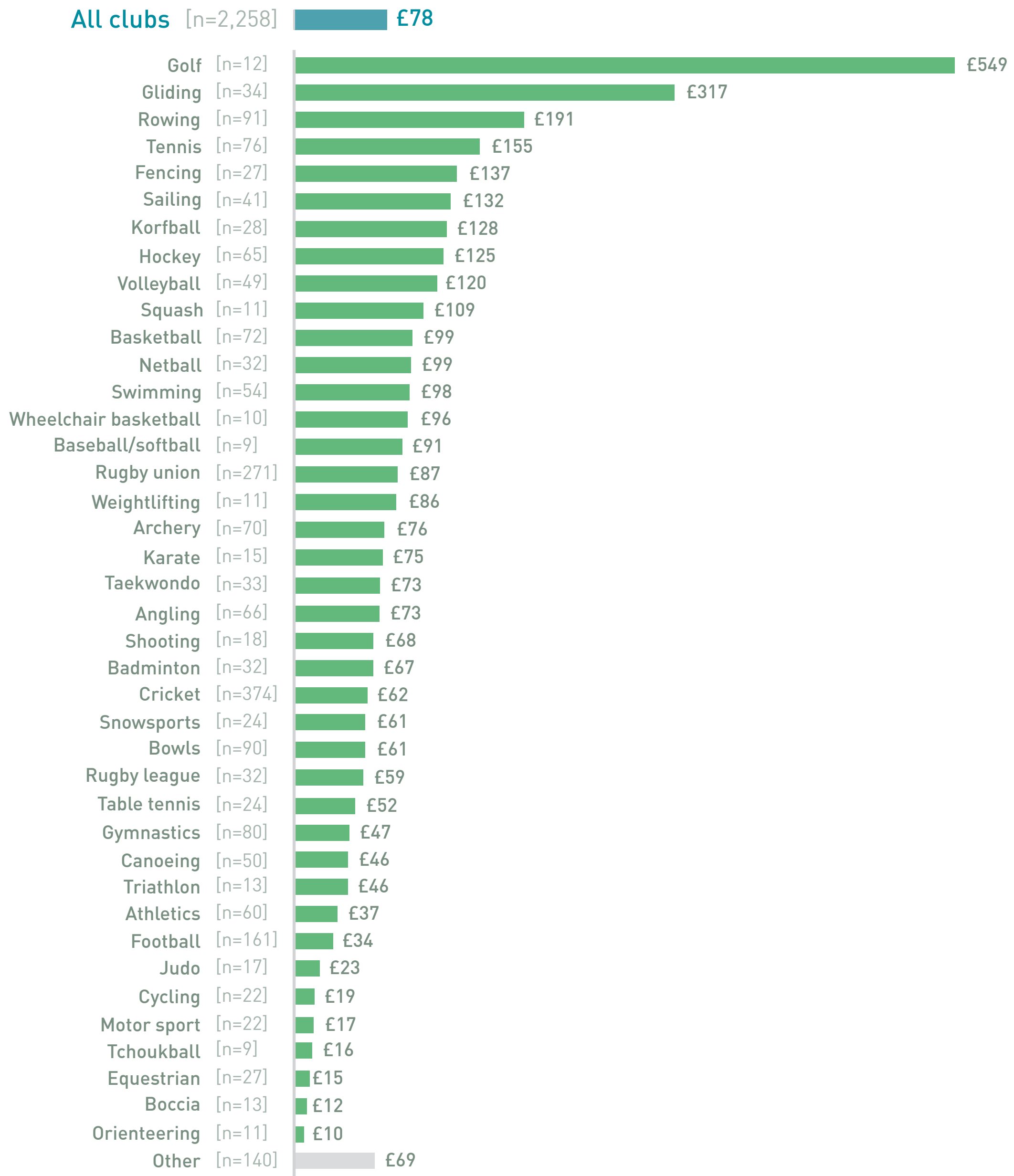
The next highest fees are found at the average gliding club £317 (n=34), rowing club £191 (n=91), tennis club £155 (n=76) and fencing club £137 (n=27). By comparison orienteering clubs £10 (n=11), boccia clubs £12 (n=13), equestrian/horse riding clubs £15 (n=27) and tchoukball clubs £16 (n=9) on average have the lowest adult participating membership fees.

[16] Total level findings for membership fees in 2013 are based on weighted data from 2,258 clubs for adults and 2,285 clubs for juniors. Total level findings for membership fees in 2012 are based on weighted data from 2,232 clubs for adults and 2,245 clubs for juniors.

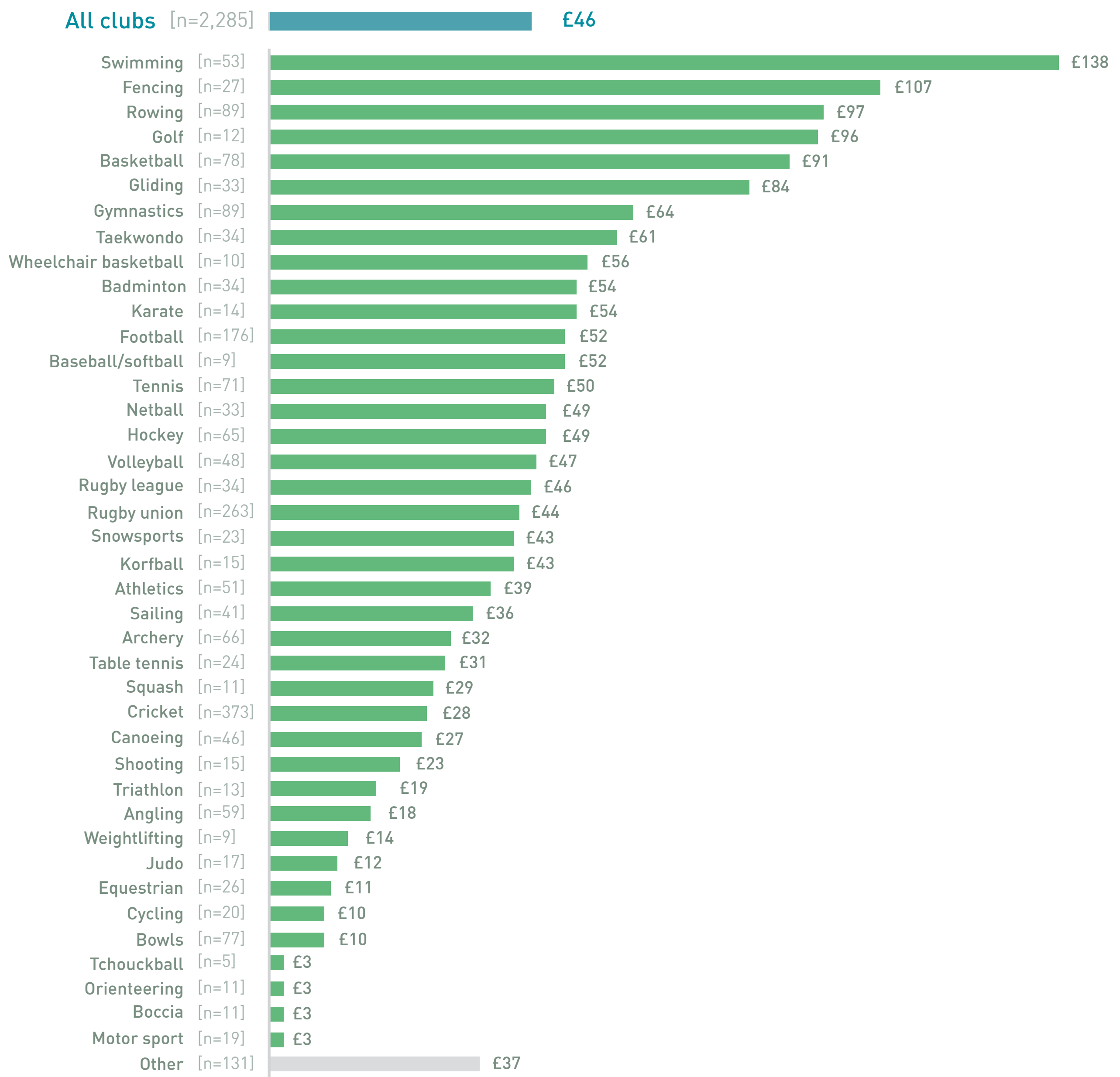
[17] In previous Sports Club Surveys, clubs were asked about the fees for junior participants whereas in 2013 the survey asked about junior membership fees. This means the data is not entirely comparable between 2013 and previous years although it is likely to be indicative given that junior memberships are predominantly participating.

The highest junior membership fees are found at the average swimming club £138 (n=53), fencing club £107 (n=27), rowing club £97 (n=89), golf club £96 (n=12) and basketball club £91 (n=78). By comparison, the lowest fees for junior members are found at the average orienteering club £3 (n=11), boccia club £3 (n=11), tchoukball club £3 (n=5) and motor sport club £3 (n=19).

Average adult participating membership fee by sport (2013)



Average junior membership fee by sport (2013)



At the average CASC, the adult participating membership fee is £96 (n=564) – higher than in the average UK club where it is £78. The average CASC club junior membership fee is £47 (n=556) on a par with the average UK club at £46.

This shows that the average CASC is likely to have higher adult participating membership fees than the average club across the UK but that junior membership fees at CASCs are in line with the average across all sports clubs.

Higher adult membership fees at the average CASC may be related to the costs of facility ownership experienced by CASCs, as 82% own, part own or long term lease their facilities – almost twice as many as across all UK clubs.

ONE THIRD OF CLUBS (34%) SAID THAT IN THE LAST YEAR THEY HAD TAKEN THE MEASURE OF INCREASING MEMBERSHIP FEES IN ORDER TO INCREASE CLUB INCOME

In support of this, at £82 we see that participating adult member fees are much closer to the average UK club for the average CASC that does not own, part own or long term lease their facility (n=122). With larger memberships and more formalised structures resulting in more volunteers and paid staff, it is likely that beyond facility related costs, CASCs have additional staffing or volunteer related costs to pass on to members through their annual fees.

It is also possible that in order to keep junior fees low and increase junior participation, additional costs are sought through adult participating member fees.

Membership fees also vary by the facility status of the club. The adult participating membership fee at the average facility owning, part owning or long term leasing club is £110 (n=845), with the average club which hires or short term leases having participating adult fees of £64 (n=920) and a much lower £34 at the average club which uses public space (n=134).

The average club using a combination of facilities has adult participating member fees that lie somewhere in-between, at £53 (n=300). There is less variation in junior membership fees – with the average facility owning, part owning or long term leasing club (n=846) having junior fees of £43 and the average club that hires or short term leases (n=950) with junior fees of £52. Also the average club that uses a combination of facilities (n=296) has junior fees of £46 whilst the average club relying on public space came out a lot lower at £26 (n=134).

This shows that where clubs are able to use public space adult and junior fees are likely to be lower. This is probably because running costs for the location they train in are likely to be much lower when using public space than for clubs which hire, lease, or own their facilities, with members ultimately not having to bear these additional facility related costs.

Over half (55%) of sports clubs told us that there are additional costs which members paid to participate at their club on a regular basis, while 19% of clubs told us that there are additional costs which members paid occasionally to participate (n=2,487).

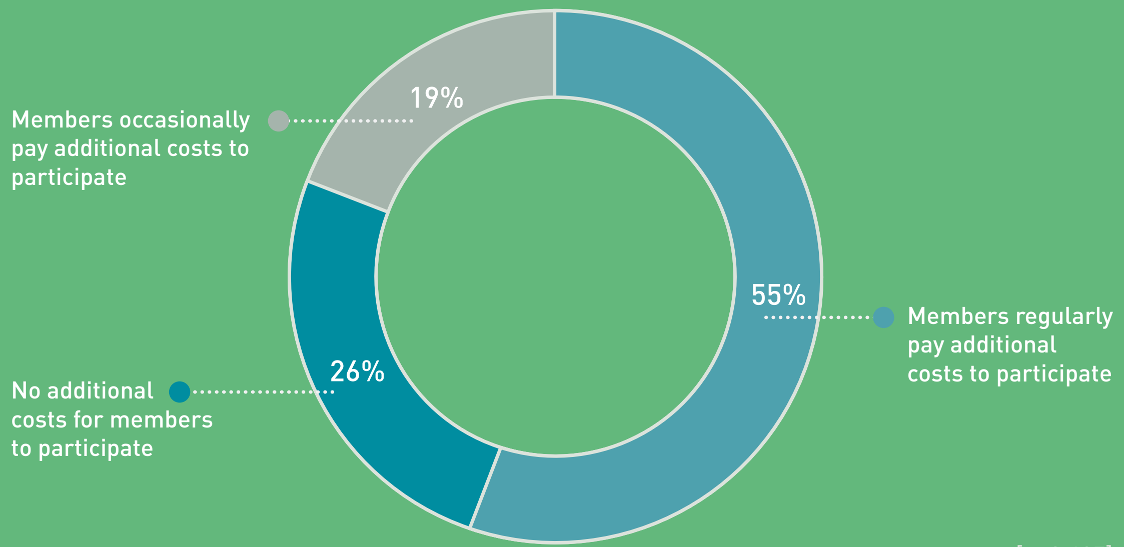
The sports where additional costs to participate[18] are most common are gliding 91% (n=33), cricket 85% (n=373), hockey 81% (n=66) and motor sports 81% (n=22). The sports with the highest proportion of clubs saying that they never have additional costs for members to participate are angling 55% (n=67), fencing 49% (n=33) and archery 46% (n=78).

For CASC scheme clubs (n=582), 59% told us that there are additional costs which members pay regularly to participate – this is just above the weighted figure for all clubs.

Amongst CASCs, 19% of clubs told us that there are additional costs which members paid occasionally – again this is on a par with the weighted figure across all clubs. This suggests that CASCs aren't more likely to charge additional costs than the average club.

[18] Based on sports where there were more than 20 responses to this question.

Clubs with additional costs for members to regularly participate



[n=2,487]

FACILITY COSTS

Nearly half of clubs (45%) either long term lease, own or part own the facility where their main activity or activities take place (n=2,455). These clubs incur a range of costs which will vary by the type of facility they own or long term lease but can include electricity, gas, water and property insurance, all of which contribute to overall club expenditure.

The table below shows the average spend on a number of facility related elements for those clubs which incur these costs. As discussed above the average expenditure at golf clubs is well above that at other clubs and heavily related to their facility maintenance. In light of the small number of golf clubs in our sample and the large extent to which they influence this data, the costs below exclude golf clubs. Golf clubs are included in the calculations for the percentage change between 2012 and 2013 as proportional change is not influenced by extremities in overall costs. These changes are based only on clubs which provided figures for both years.

Cost	Average spend (£) 2012	% change between average for 2011 and 2012 based on clubs which provided figures for both years
Outdoor facility maintenance	£6,570	33%
Base	416	189
Indoor facility maintenance	£3,348	23%
Base	245	116
Electricity	£3,178	10%
Base	356	161
Gas	£2,939	19%
Base	190	68
Business rates	£2,312	20%
Base	236	115
Property Insurance	£2,087	3%
Base	366	77
Water	£1,014	38%
Base	316	141
A music licence	£395	2%
Base	100	54

The table also shows the average percentage change experienced for these costs at clubs which provided data for both 2012 and 2011 within each expenditure item.

Between 2011 and 2012, clubs that own, part own, or long term lease their facilities have seen a 38% increase in their water costs with the average club which pays water bills spending £1,014 in 2012. As a proportion of their total expenditure this means that clubs with water bills have seen rises from 1.8% of their total expenditure in 2011 (n=129) to 2.7% in 2012 (n=308).

Over the same time, outdoor facility maintenance has also increased by a third (33%) and at £6,570 represents one of the largest facility outgoings for clubs, closely followed by indoor facility maintenance which cost the average club that undertakes it £3,348 in 2012 and has increased by 23% between 2011 and 2012.

Overall, the average club which pays business rates spent £2,312 on rates in 2012. However, the average spend on business rates is much lower for CASCs at just £1,525 (n=128) reflecting the mandatory 80% rate relief received by these clubs.

The average club which spends on gas spent £2,939 in 2012. On average in 2012 clubs spent 4.5% (n=183) of their expenditure on their gas bill, compared to 5.1% in 2011 (n=63). However, where clubs provided gas expenditure figures for both 2011 and 2012 the average increase was 19% over the year suggesting that clubs are coming under pressure from increasing energy costs.

The average club which spends on electricity spent £3,178 in 2012. Where clubs provided data for both 2011 and 2012 there was an average increase of 10% (n=161) in cost from 2011 to 2012 demonstrating that electricity costs are also increasing for clubs, albeit not as steeply as gas.

Although the number of clubs which provided figures for 2011 and 2012 for facility cost expenditures were not large, and therefore the percentage increases between the two years should be treated with caution, with the exception of music licences and property insurance all of the other costs showed on average above inflation increases[19].

This suggests that the increasing energy and utility costs experienced elsewhere in the economy are also impacting on the costs of sports clubs. Furthermore, the impact of any upcoming changes to music licensing fees should not be underestimated.

[19] Inflation average 3.2% a year between 2011 and 2012 as calculated using the Bank of England inflation calculator: http://www.bankofengland.co.uk/education/Pages/inflation/calculator/flash/default.aspx.

RATE RELIEF

Her Majesty's Revenue and Customs (HMRC) registered Community Amateur Sports Clubs (CASCs) are entitled to a mandatory 80% relief on their business rates. Local authorities are also able to grant discretionary relief for up to the remaining 20%. In addition, local authorities can grant rate relief of anywhere up to 100% to non-CASC registered sports clubs at their discretion.

Given rising cost pressures on facility owning clubs across the UK such as energy prices, both mandatory and discretionary rate relief are important benefits – helping to support community sports clubs through reducing the costs of owning a facility.

Given the cuts currently faced by local authorities and anecdotal evidence from the sector we asked clubs whether they had experienced a reduction in their discretionary rate relief in the past 12 months or whether they had been given notice that their discretionary rate relief will be partially or entirely withdrawn in the future.

Nearly one in four CASCs (n=65) told us that they had either experienced a reduction in the past year or had been informed that some or all of their rate relief would be withdrawn in the next year. Fifteen per cent of CASCs told us that they used to receive a greater proportion of discretionary rate relief than they currently do, and 9% of CASCs said that they had been given notice that they will receive less in the future.

Across all clubs, 21%[20] had either been told that they would have their relief partially or totally withdrawn in the next year (10%) or said that they used to receive a greater proportion 12% (n=135). These figures show that a minority of clubs are experiencing cuts to an important means of financial support.

In keeping with the findings of the Alliance's report on discretionary business rate relief which found that only a small proportion of local authorities were reporting changes in policy or budgets for discretionary rate relief in the next year, the results of the Sports Club Survey suggest that cuts to discretionary rate relief are not currently as widespread as feared.

The introduction of the business rate retention scheme from April 2013 may impact on the proportion of clubs receiving these benefits in the future and therefore the 2015 and 2017 Sports Club Surveys will be useful for investigating if this is the case.

[20] The figures do not sum up to 100% here as clubs were able to select as many situations as applied to them.

HIRING FACILITIES

Half of all clubs (49%) hire a facility – with the average club that hires (n=992) spending £5,224 on doing so in 2012. This amounts to an average of 47% of their expenditure on facility hire (n=758). This represents an increase of £231 (5%) on 2011 when the average club spent £4,993 on hiring (n=936), amounting on average to 47% of their expenditure (n=676).

Proportionally there has been no change in the percentage of expenditure the average club is spending on hiring facilities between 2011 and 2012 and the cost of facility hire remains a substantial part of many sports clubs' expenditure.

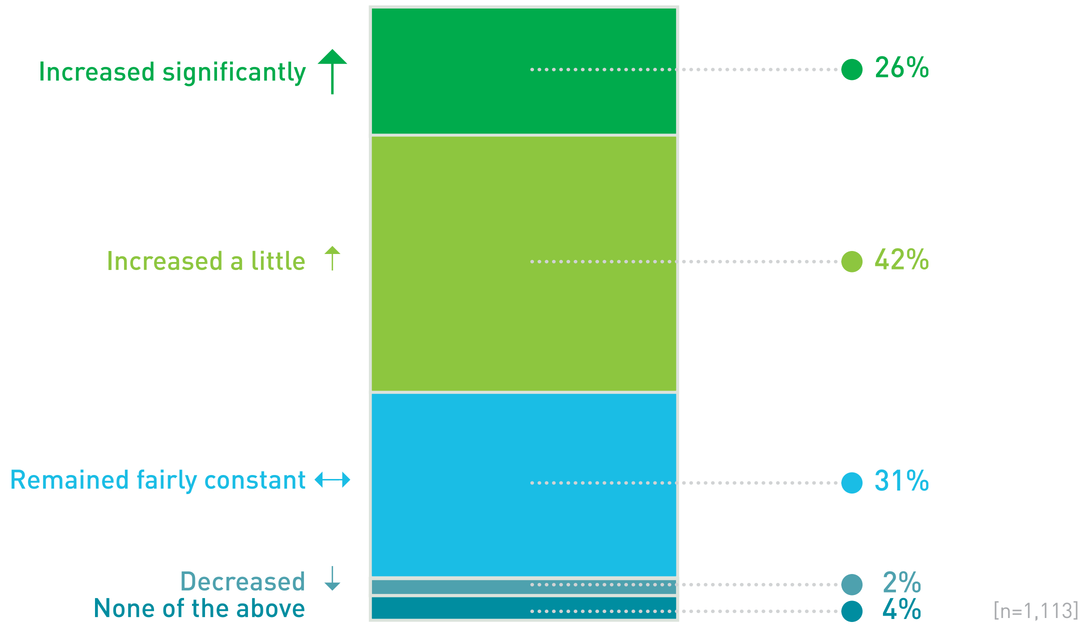
However, the amount spent on facility hire is influenced by not only the cost of that hire, but the volume of hire by the club e.g. the number of sessions or venues hired. When asked about the cost of hiring facilities, 42% of clubs that hire said that their hire costs have increased a little in the past two years and 21% say that their facility hire costs have increased significantly in the past two years (n=1,113).

The experience of these 63% of clubs shows the cost pressures that clubs which hire experience and explains some of the rise in average club expenditure. If club incomes are unable to cover increasing expenditure costs it is possible that clubs will be forced to hire facilities less in order to keep costs constant. Ultimately this may lead to needing to turn away new members due to lack of training capacity.

Encouragingly though, nearly one in three clubs (31%) say that their facility hire costs have remained fairly constant in the past two years, against the rising costs experienced elsewhere in the economy.

THERE HAS BEEN NO CHANGE IN THE PERCENTAGE OF EXPENDITURE THE AVERAGE CLUB IS SPENDING ON HIRING FACILITIES BETWEEN 2011 AND 2012

Changes in the cost of facility hire over the last two years



The impact of rising facility hire costs on members is evident in that across all clubs that hire facilities (n=967), 30% have increased their membership fees in the past year in order to increase club income, but this rises to 42% in clubs where facility hire costs have increased significantly in the past two years (n=198) and is as low as 12% in those clubs where facility costs have decreased in the past two years (n=23).

Equally, across all clubs which hire a facility 14% (n=967) say that they have increased additional costs to members in the past year, while this is as high as 24% in clubs where facility costs have increased significantly (n=198), and as low as 8% in clubs where facility costs have decreased in the past two years (n=23). This indicates that where clubs experience increases in their facility hire costs they are more likely to increase membership fees or pass costs on to members through other means.

Looking to the future, 47% of clubs (n=1949) told us that increased facility costs were one of the challenges they are concerned about in the next two years. This increases to 54% of clubs when looking at those which hire (n=1,005) and is lower at 40% in those that own or part own facilities (n=388). This suggests that clubs which hire are slightly more likely to be concerned about increased facility costs than those which own or part own facilities. This could be related to a lack of control over hire costs compared to say switching utility provider to save money if the club owns the facility.

Only 2% of clubs which hire (n=1,113) said that their facility costs had decreased in the past two years. Of these clubs 61% (n=23) told us that they had changed facility provider in the past two years in order to reduce club expenditure, showing that they had actively moved facility provider in order to decrease this expenditure.

However, for many clubs this may not be a possibility due to lack of appropriate and available alternative, cheaper facilities.

SECTION 05

CLUB SET-UP

CLUB SET-UP

Since 2011 there has been an encouraging 20% increase in the number of volunteers at the average sports club with 24 full or part time volunteers in 2013.

Nine of these are qualified coaches compared to one of the two full or part time members of paid staff.

Although nearly three in five clubs (59%) rate the equipment used at their club as good or very good quality, almost one in ten clubs (8%) lack access to appropriate equipment for neither disabled nor non-disabled people to participate fully whilst only one in three (35%) have access to appropriate equipment for both disabled and non-disabled people to participate fully.

THE AVERAGE SPORTS CLUB IN 2013 HAS 24 FULL OR PART TIME VOLUNTEERS, NINE OF WHOM ARE QUALIFIED COACHES

VOLUNTEERS AND PAID STAFF[21]

The London 2012 Olympic and Paralympic Games saw 70,000 Games Makers volunteering to make the staging of the Games a success, and the Government has also committed to delivering a volunteering legacy from the Games.

Positively then, the average sports club in 2013 has 24 full or part time volunteers, nine of whom are qualified coaches. The average club also has two full or part time members of paid staff, one of whom is a qualified coach. Encouragingly, club volunteers have increased by 20% since 2011[22] when there were 21 volunteers at the average club.

Yet despite this increase in volunteers, almost three in four clubs 73% (n=2,577) reported that no volunteers joined their club directly after the Games in July and August 2012.

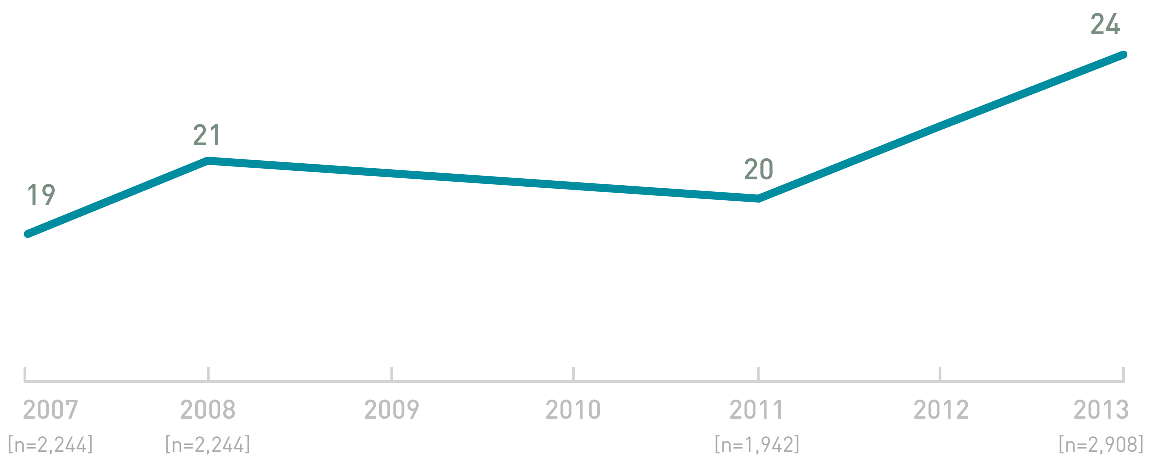
[21] Total level findings about number of volunteers are based on weighted data from 2,909 clubs. Total level findings relating to paid staff are based on weighted data from 2,907 clubs.

[22] All comparisons to 2011 refer to the 2011 Sport and Recreation Alliance Sports Club Survey.

For those clubs which did report an increase in volunteers following the Games the average increase was by six volunteers (n=696) and on average clubs which reported an increase have 30 volunteers now compared to 24 before the Games. This shows that at those clubs where volunteers did increase after the Games this increased the number of volunteers at the club by on average 25%.

36% OF CLUBS ARE EXCITED ABOUT INCREASING THE NUMBER OF VOLUNTEERS AT THEIR CLUB IN THE NEXT TWO YEARS

Number of volunteers at the average sports club over time



Eight in ten (78%) of the clubs with more volunteers following the Games (n=695) are Olympic or Paralympic sports. This suggests a small proportion of clubs, largely amongst sports which were included in the Games, benefited directly after the Games in terms of volunteer support.

But it also shows that more widely, given the increase in the average number of volunteers from 2011 to 2013, that volunteering in the sector has increased. This may or may not be linked to the Games.

Although we have seen a 20% increase in the average club's number of volunteers between 2011 and 2013, two in five clubs (42%) are concerned about recruiting volunteers in the next two years and more than one in three clubs (37%) say that retaining volunteers represents an upcoming challenge (n=1,949).

Encouragingly, 56% of those who see recruiting volunteers as a challenge (n=807) and 54% of those who see retaining volunteers as a challenge (n=710) also see increasing the number of volunteers at their club as an opportunity, with 36% of clubs (n=1902) excited about increasing the number of volunteers at their club in the next two years.

This shows that while there are concerns about retaining or recruiting volunteers there is also optimism about opportunities to recruit more volunteers in the future. Combined with the growth seen since 2011 this suggests that volunteering in the sector is looking healthier moving forward.

The number of part or full time paid staff at the average club has increased from one in 2011 to two in 2013 (n= 2,907). On average clubs have nine volunteers who are qualified coaches (n=2,909) and one member of paid staff who is a qualified coach (n=2,665).

Three in ten clubs (31%) identified a lack of coaches to meet member demand as a challenge in the next two years and a similar number (30%) said that they were concerned about retaining coaches (n=1,949).

This shows that there is appetite amongst nearly a third of clubs for recruiting and similarly for retaining more qualified coaches. This could be related to growing membership numbers at the average club, with clubs needing to provide coaching for more members. Future membership growth may therefore be limited without sufficient coaching resource.

At the average club there are eight participating members (adult and/or junior) to one paid member of staff or volunteer in 2013 (n=2,856). However this varies by activity with for example, at the upper end, on average 26 participating members to one member of paid staff or volunteer at angling clubs (n=66) and at the lower end, an average of two participating club members to one member of paid staff or volunteer at gliding clubs (n=36).

Here, these sport specific figures are likely to reflect the relative level of supervision and/or coaching required by these different activities, and in the case of gliding for example, the higher risk nature of the sport.

VOLUNTEERS AND PAID STAFF BY CLUB TYPE

Whilst the average club specifically for disabled people (n=68) also has two members of full or part time paid staff, they only have 13 volunteers. However with fewer members, proportionally they have more volunteers or paid staff per participating member, with on average three members to one volunteer/paid member of staff.

The average club running parallel sessions for disabled and non-disabled people (n=215) has considerably more volunteer and paid staff resources with 37 and 6 people in these positions respectively.

In contrast to clubs specifically for disabled people, with higher than average memberships within clubs running parallel sessions there are eight participating members to one volunteer/member of staff.

With 26 volunteers and two paid staff, clubs providing opportunities for disabled people and non-disabled people to take part together (n=1,326) have on average ten participating members to each volunteer or paid employee. Five (n=60) volunteers/staff at the average club specifically for disabled people have received training to amend or adapt their sport for disabled participants, compared to two (n=2,567) volunteers/paid members of staff whom have received this training across all clubs.

This data could be misleading however as within a club specifically for disabled people volunteers and staff may be fully trained at delivering their activity appropriately and not need further training to be more inclusive.

Of more note, fewer than one in ten volunteers/employees at clubs which provide opportunities for disabled and non-disabled people to participate together 7% (n=1,165) and clubs that provide parallel sessions for disabled people and non-disabled people 9% (n=192) have received training to amend and adapt their sport to make it more inclusive for disabled people.

This suggests that although these clubs do offer opportunities for disabled participants to participate in their activities, more could be done to ensure staff are able to make any adaptations required to participate fully.

One in three clubs 32% (n=1,961) said they would like to receive training and/or support to provide for disabled people to participate if it was offered at minimal cost by the sector – showing that there is an appetite among these clubs for understanding the needs of disabled participants better.

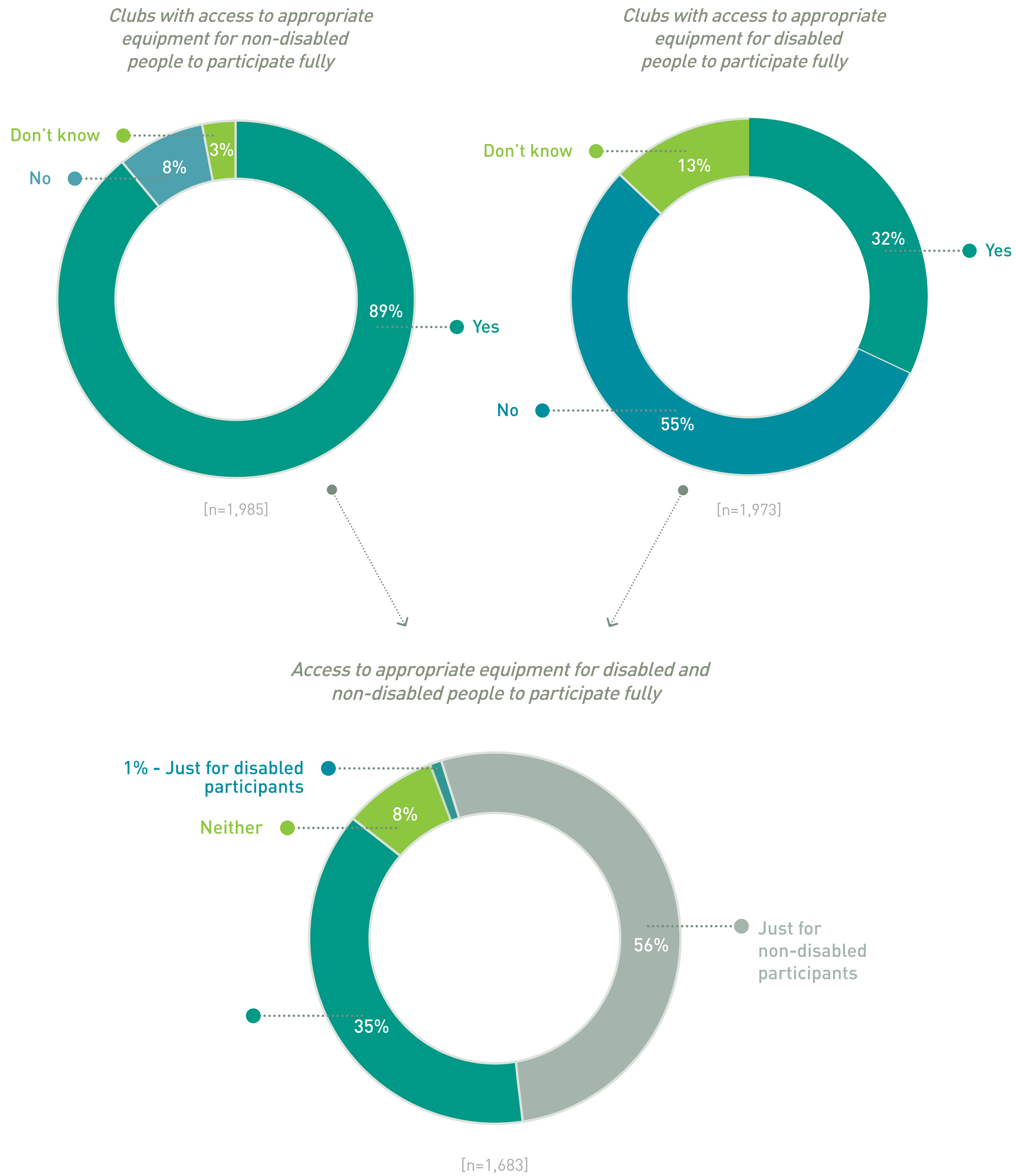
EQUIPMENT[23]

Almost one in ten (8%) clubs lack access to appropriate equipment for anyone to participate fully in their sport. Only one in three clubs (35%) say that they have access to appropriate equipment for both disabled and non-disabled people to participate although this rises to 84% of clubs specifically for disabled people (n=31).

More than half of clubs (56%) have access to appropriate equipment just for non-disabled people to participate. This amounts to nine in ten (89%) of all clubs which have access to appropriate equipment for non-disabled participants to take part in their activity, compared to three in ten 32% of all clubs having appropriate equipment for disabled people.

Unsurprisingly clubs specifically for disabled participants have the fullest equipment provision for disabled participants with an encouraging 94% (n=42) stating that they have appropriate equipment for disabled participants to participate fully in their activity.

[23] Total level findings about equipment availability for disabled participants are based on weighted data from 1,973 clubs. Total level findings about equipment availability for non-disabled participants are based on weighted data from 1,985 clubs. Findings about the quality of equipment are based on weighed data from 1,912 clubs.



On average, clubs that run parallel sessions for disabled and non-disabled participants have better equipment provision for disabled participants than clubs where disabled and non-disabled people take part in the activity together.

Almost two thirds 63% (n=134) of clubs running parallel sessions state they have access to appropriate equipment for disabled people to participate properly compared to 43% of clubs where disabled people and non-disabled people participate together.

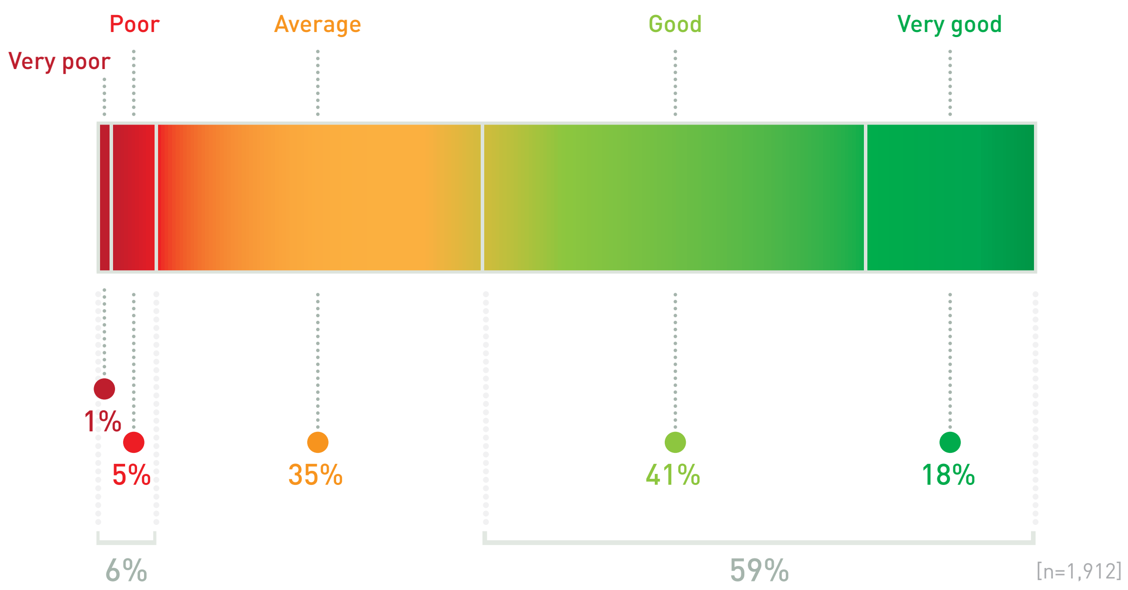
Slightly more than one in ten clubs 13% (n=1,973) didn't know whether they had appropriate equipment for disabled participants to participate fully in their activity. This could indicate some uncertainty, or lack of awareness, about what equipment is appropriate for disabled participants to participate in their activity fully. This figure is higher 16% (n=963) amongst clubs where disabled and non-disabled participants take part in the activity together.

It is possible that in some cases although the club offers opportunities for disabled people to participate, knowledge about how to deliver truly inclusive activities may be lacking.

It should also be noted that equipment requirements for disabled people will vary depending on the nature of individual disabilities, and that some sports will require equipment that is easier or more affordable to adapt than others. Reassuringly, nearly three in five clubs (59%) rate the quality of their equipment as good or very good, 35% rate their equipment as average with only 6% saying the quality of the equipment they use is poor or very poor (n=1,912).

Of the 6% of clubs that rate their equipment as poor or very poor, 41% (n=114) said that they had taken the measure in the last 12 months of not renewing equipment in order to reduce expenditure compared to 26% across all clubs (n=1,882). This suggests that for a minority of clubs, not renewing equipment may be having an impact on its quality.

Quality of equipment used by sports clubs



FACILITIES

The most common club set-up to access facilities is facility hire (49%), although there is considerable variation by sport. More than one third of all clubs (38%) hire or lease a facility from their local authority whilst one in five (21%) own their facility – highlighting the importance of local authority facility provision. Reassuringly, 62% of clubs that hire or lease their facilities rate them as either good, very good or excellent.

MORE THAN ONE THIRD OF ALL CLUBS (38%) HIRE OR LEASE A FACILITY FROM THEIR LOCAL AUTHORITY

TYPES OF FACILITY ACCESS[24]

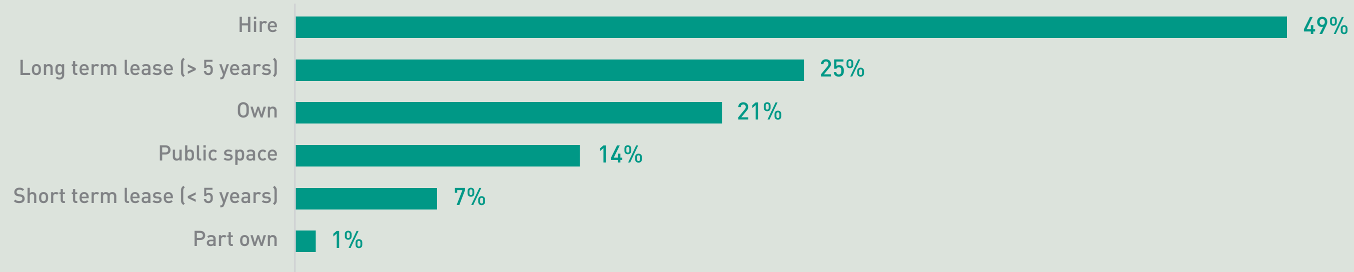
In order to be able to train, practice or play, sports clubs need to have sufficient access to appropriate facilities or to public space. This also needs to be at an affordable cost and at a suitable time.

The chart below shows the proportion of clubs which own, part own, long term lease (a lease of longer than five years), short term lease (a lease of fewer than five years) or hire their facilities.

Clubs were invited to select as many of these options as applied to them and 14% of clubs told us they used more than one of these facility set ups – the most common combination being to hire and use public space.

[24] Total level findings for facilities are based on weighted level data from 2,455 clubs.

Facility set-up for main activities [n=2,455]



Note: This question allowed clubs to select more than one answer which is why the totals do not sum to 100%.

HIRING AND LEASING

The proportion of clubs which hire a facility in 2013 is 49%. This is a substantial drop on the 2011 figure of 66% whilst we see fairly constant levels of facility use in other areas. The sports in which clubs are more likely to hire[25] are tchoukball 100% (n=10), korfball 100% (n=28), badminton 97% (n=34), judo 95% (n=21), netball 94% (n=36), karate 94% (n=16), wheelchair basketball 92% (n=12), taekwondo 91% (n=34), fencing 91% (n=33), basketball 91% (n=85), swimming/aquatics/diving 91% (n=63) and volleyball 90% (n=49).

Of these sports where hiring is more often the main means of accessing facilities and where there is comparable data in the 2011 Sports Club Survey[26], there has been little change in the percentage of clubs hiring from 2011. This suggests that where hiring is the traditional means of accessing facilities, this remains the case.

In 2011, 30% of clubs which owned their facilities also hired a facility (n=408) but this has fallen to 9% in 2013 (n=538), suggesting that where clubs hired and owned a facility they are now more likely just to use the facility which they own as their main facility. This could be for a number of reasons, such as the costs of hiring, availability of facilities to hire or lack of demand from members for using a number of facilities[27].

The proportion of clubs that are leasing a facility remains broadly the same as in 2011 with 25% leasing on a long term basis and 7% leasing on a short term basis (31% leasing at least one facility) on a par with the 31% leasing in 2011.

The sports in which clubs are most likely to lease a facility[28] on a long term lease are sailing 61% (n=44), tennis 49% (n=76) and cricket 48% (n=373). The sports in which clubs are most likely to lease a facility on a short term lease are angling 39% (n=64), canoeing 24% (n=51) and weightlifting n=23% (n=13). Clubs hire and lease from a variety of providers, the most common of which is the local authority from which half (53%) of clubs which hire or lease their facility do so. Across all clubs, this amounts to more than one third (38%) which are reliant on their local authority as a facility provider.

The other main providers are schools (33%), private operators (21%) and trusts or charities (12%).

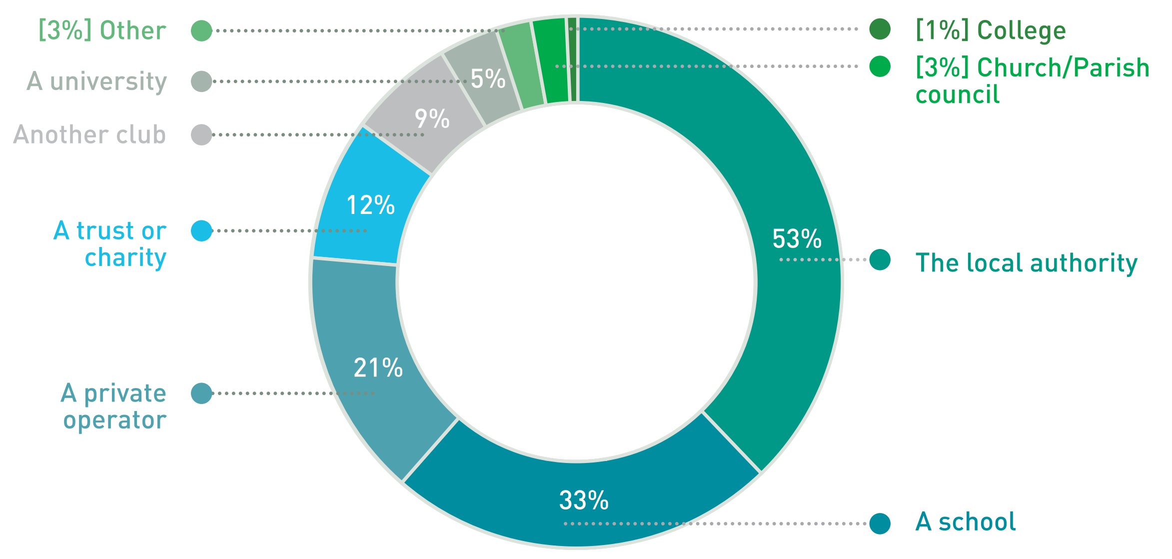
Where clubs hire or lease from the local authority the local authority is responsible for maintaining the facility in 68% of cases while in 21% of cases the facility is maintained by the club (n=889). This underlines the important role which local authorities play in providing facilities for many sports clubs and the need for a good relationship between sports clubs and their local authority.

For the 21% of clubs that are responsible for maintaining their facilities, these clubs are likely to be making a valuable contribution to their communities by taking responsibility for facility upkeep. It will be interesting to see whether the proportion of clubs which are responsible for maintaining facilities changes in 2015 and if there are greater cuts to local authority spending.

25 Based on sports with more than ten responses to this question.
26 Badminton, netball, basketball, swimming and volleyball.
27 Owing to a slight difference in the way the question was asked in 2013 to 2011 some of this decrease may be attributable to clubs prioritising the place they use the most over others when compared to 2011. In 2013 clubs were asked to select all sets-ups which apply to them, whereas in 2011 clubs had to give a yes or a no answer to each set-up type. However, given that the proportion of clubs leasing or owning remains consistent with 2011 it is likely that the figures do evidence a decrease in the use of public space and hiring.
28 Based on sports with more than ten responses to this question.

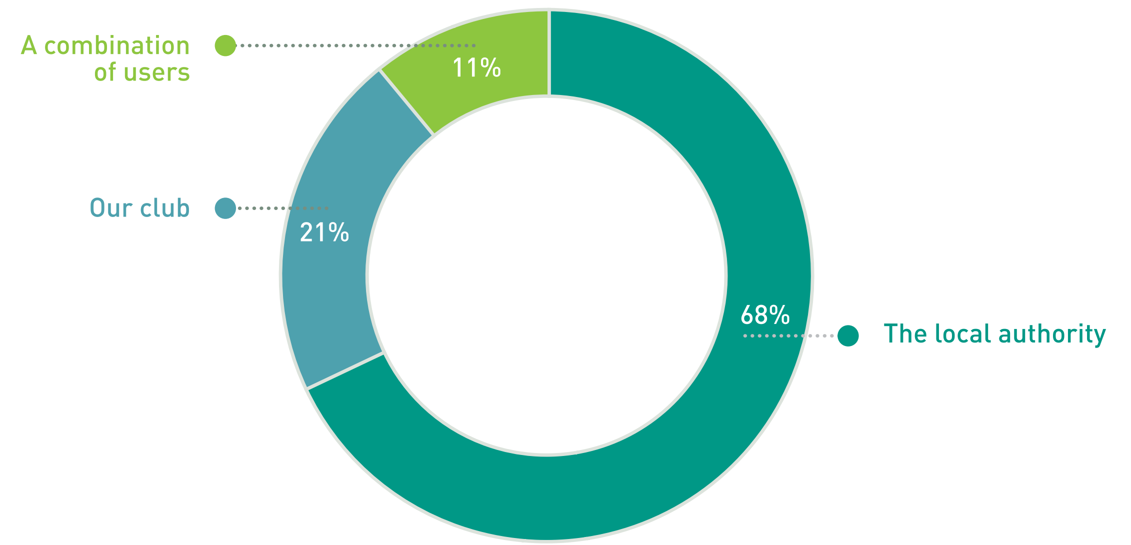
Sources of hired or leased facilities

[n=1,742]



Note: Clubs could select all applicable providers, therefore totals do not sum to 100%.

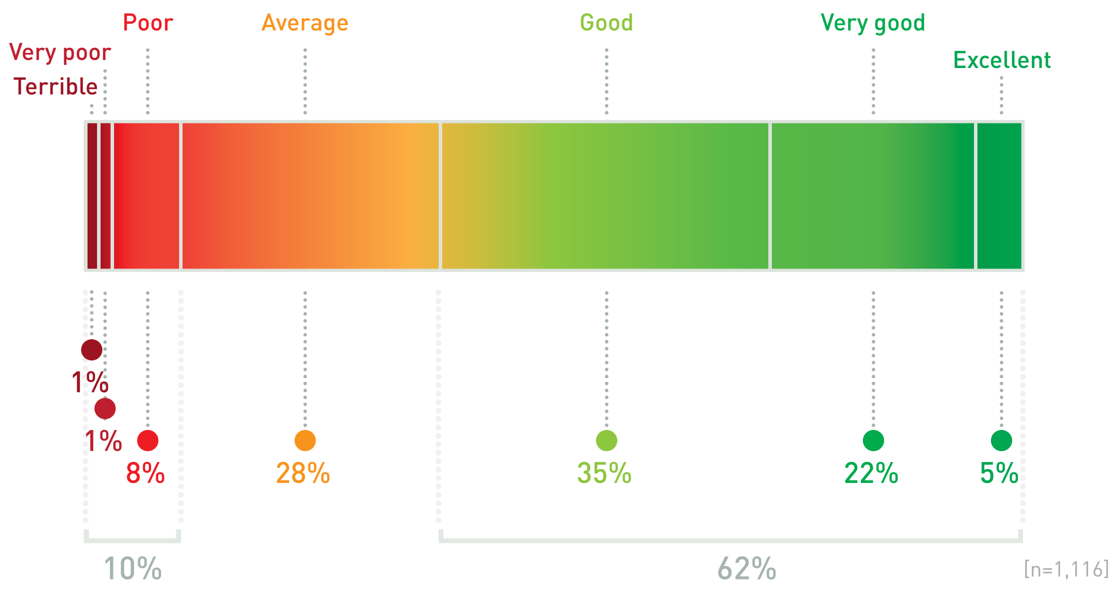
Responsibility for maintaining local authority premises



[n=889]

It is good news that around three in five clubs (62%) rated the facilities they hire as good, very good or excellent in quality, with only 10% of clubs saying that their facilities are poor, very poor or terrible (n=1,116).

Quality of equipment used by sports clubs



FACILITY OWNERSHIP

Facility ownership has remained at broadly the same level as in 2011 with 21% of clubs owning a facility and 1% part owning (22% owning or part owning at least one facility) compared to 21% owning a facility in 2011. Sports most likely to own a facility are golf clubs 83% (n=12), squash and rackets clubs 82% (n=11), shooting clubs 50% (n=18) and rugby union clubs 49% (n=277).

CASCs are also more likely to own, with 38% owning and 2% part owning a facility (n=578). This is likely to reflect the fact that facility owning clubs may see greater benefit to becoming a CASC because of the 80% mandatory rate relief which CASCs are entitled to.

FACILITY OWNERSHIP HAS REMAINED AT BROADLY THE SAME LEVEL AS IN 2011 WITH 21% OF CLUBS OWNING A FACILITY AND 1% PART OWNING

PUBLIC SPACE

The proportion of clubs using public space has fallen since 2011 from 25% to 14%. This continues a downward trend since 2009 when the figure stood at 33%. In 2011 the percentage of facility owning clubs that also used public space was 17% (n=408) and in 2013 the percentage of facility owning or part owning clubs that also used public space was 6% (n=538).

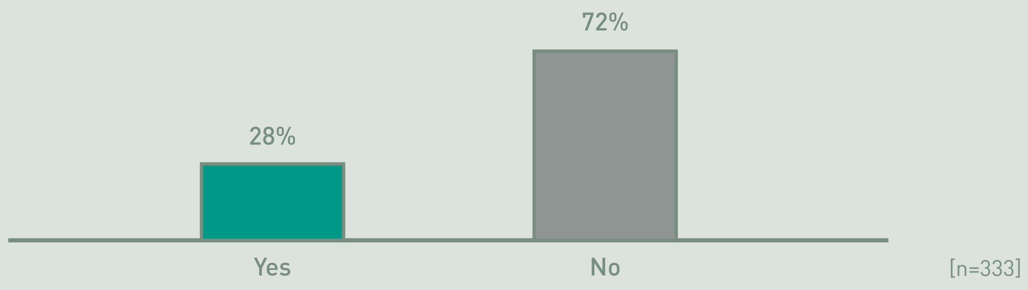
It therefore appears that facility owning clubs are reducing their public space use. This could be for a number of reasons such as access issues, weather, public space availability or because although they do use public space, the facility they own is the main place where they participate or train[29].

Unsurprisingly, the use of public space is highest in those sports where predominantly the main activity can take place outdoors[30]: orienteering 100% (n=11), motor sports 82% (n=22), cycling 61% (n=23), horse riding/equestrian 57% (n=30) and canoeing 45% (n=51).

Of those using public space, over a quarter (28%) said that they experienced access issues, while encouragingly 72% said that they experienced no access issues (n=333). The sports with the highest incidence of access related issues among those clubs which use public space are orienteering 91% (n=11), horse riding/equestrian 82% (n=17), canoeing 57% (n=23), angling 48% (n=23), cycling 43% (n=14).

In particular, orienteering faces access issues because the sport requires access to public space that can offer a range of terrains and ideally this should be unfamiliar, making it difficult to find the right public spaces.

Access issues at the public space used for main activities



29 Owing to a slight difference in the way the question was asked in 2013 to 2011 some of this decrease may be attributable to clubs prioritising the place they use the most over others when compared to 2011. In 2013 clubs were asked to select all sets-ups which apply them whereas in 2011 clubs had to give a yes or no answer to each set up type. However given that the proportion of clubs leasing or owning remains consistent with 2011 it is likely that the figures do evidence a decrease in the use of public space and hiring.

30 Based on sports with more than ten responses to this question.

AROUND ONE IN THREE CLUBS (33%) HAVE PROVISION FOR DISABLED ACCESS (EG LOWERED KERB, RAMPS OR LIFTS), RISING TO THREE IN FOUR (75%) CLUBS SPECIFICALLY FOR DISABLED PEOPLE

The most frequently commented upon access issue relates to competition for public space from other users such as the general public or those participating in other sporting activities.

Other issues involved physical and/or legal issues around access to waterways or land, the availability of parking, the availability of public facilities, charges for use of the space, and negotiating with public bodies or private landowners over access rights. It is possible that some of these issues are driving the reduction in the use of public space by sports clubs, although further work would be required to establish if this is the case.

However, the findings show the important balance required to optimise the use of public space for a variety of different users so that use by one group of users does not limit access by others, and furthermore that private land owners should be encouraged to allow access for sporting activities where appropriate.

FACILITIES AND DISABILITY ACCESS

Clubs specifically for disabled people are less likely to own a facility than the average across all club types, with 7% owning a facility and 2% part owning (n=49) compared to 21% owning and 1% part owning across all clubs.

However, this is not the case for clubs where disabled and non-disabled people participate together (1,223) – where the percentage of clubs owning facilities (24%) is slightly above the average across all clubs. Clubs specifically for disabled people (n=49) are also more likely to use public space, with almost one in four (23%) accessing this compared to 14% of all clubs.

Around two in five clubs across the UK (n=2,279) have doorways which allow wheelchair access (42%) and a similar proportion have access to disabled parking (38%) at the facilities where their activity takes place. This rises to seven in ten (73%) and eight in ten clubs (80%) respectively for clubs specifically for disabled people (n=42). Only 2% of all clubs said that they had hearing induction loops at the facilities where their activity takes place. Around one in three clubs (33%) have provision for disabled access (eg lowered kerb, ramps or lifts), rising to three in four (75%) clubs specifically for disabled people (n=42).

These figures are unlikely to give the full picture because the needs of disabled participants will vary by the specific disabilities of the participants and the specific sport in question and clubs may have other access arrangements or options in place.

BAR

Over one in three (36%) of sports clubs which hire, lease or own facilities (n=2,279) have access to a bar at the facility where they play or train. However, bars are more commonly found in golf clubs 91% (n=11), rugby union clubs 90% (n=274) and cricket clubs 74% (n=362).

As would be expected, it is also more common to find bars in clubs which own their facilities 64% (n=496), part own their facilities 59% (n=34) or long term lease facilities 51%) (n=603).

Where clubs have access to a bar it is an important income generating source with 73% of clubs (n=400) saying that the bar makes a profit. On average 33% (n=379) of these clubs' incomes are being generated from the bar.

Amongst all CASCs which own, hire or lease facilities (n=564) 59% have access to a bar with eight in ten CASCs who own, part own or long term lease a facility (82%) reporting a profit from the bar (n=227). On average, the bar contributes to 36% of the income for facility owning, part owning or long term leasing CASCs (n=204).

These figures show the important role of bars in generating income at facility owning, part owning or long term leasing clubs which have access to them.

The table below shows expenditure incurred in 2012 on stocking and staffing the bar and paying for an alcohol licence by facility owning, part owning or long term leasing clubs with a bar. Again the costs exclude golf clubs which have considerably higher costs, although these are included in calculations of the average percentage of expenditure these clubs spent on these costs in 2012.

Cost	2012 expenditure (£)	% of expenditure spent on this cost in 2012 (all clubs with this expenditure)
Stocking the bar	£24,102	29%
Base	181	195
Staffing the bar	£19,079	16%
Base	90	114
An alcohol licence	£223	<1%
Base	151	166

SPORTS CLUBS, LOCAL COMMUNITIES AND SUPPORT

More than half of the UK's sports clubs (58%) are working with schools and a similar number (54%) are currently running some sort of programme that engages the wider community.

Almost nine in ten school links (88%) are reported to be successful whilst the community outreach work clubs are undertaking often targets key Government priority areas such as young people and physical health.

For more than half of our clubs, relationships with national governing bodies (NGBs) and county sports partnerships (CSPs) are good or very good (55% and 53% respectively) with more room for improvement with local authorities, where 46% of clubs deem their relationships to be good or very good.

Sports clubs can be found in communities all over the UK and bring people together because of a common passion. In fact, the British public believe that after going to work, school or college together (40%), sharing hobbies and going to sports clubs (29%) is the best way for people from different backgrounds to mix more[31].

With 24 volunteers at the average sports club to just two paid members of staff (full or part time), support from the community is vital to ensure clubs thrive and it is therefore no surprise that there are more volunteers in sport than in any other sector. But importantly, sports clubs also give a lot back to their local communities by working with schools and targeting their activities at a wide range of people.

[31] Department for Communities and Local Government (2011), Community Spirit in England: A report on the 2009-10 Citizenship Survey, London: Crown Copyright.

LINKS WITH SCHOOLS[32]

Summer 2011 saw the end of formal ring fenced funding for School Sport Partnerships, although schools were able to continue with these if they wished and could find alternative funding to do so.

In 2012, the Government committed to establishing 6,000 new school-club links by 2017 through NGBs and the roll out of satellite clubs[33]. More recently in the wake of the Olympic and Paralympic Games, ring fenced funding for school sport has been re-instated, albeit with a different structure.

In March 2013, £150 million of school sport funding was announced for each of the next two years. This ring fenced funding will be distributed directly to primary schools in order to support the delivery of PE and school sport.

The timing of the 2013 survey, in field between 1 April and 30 June 2013 means that the impact of this new funding will not be reflected in our findings. However, they demonstrate that links between schools and sports clubs are important for our clubs and that existing relationships are largely positive.

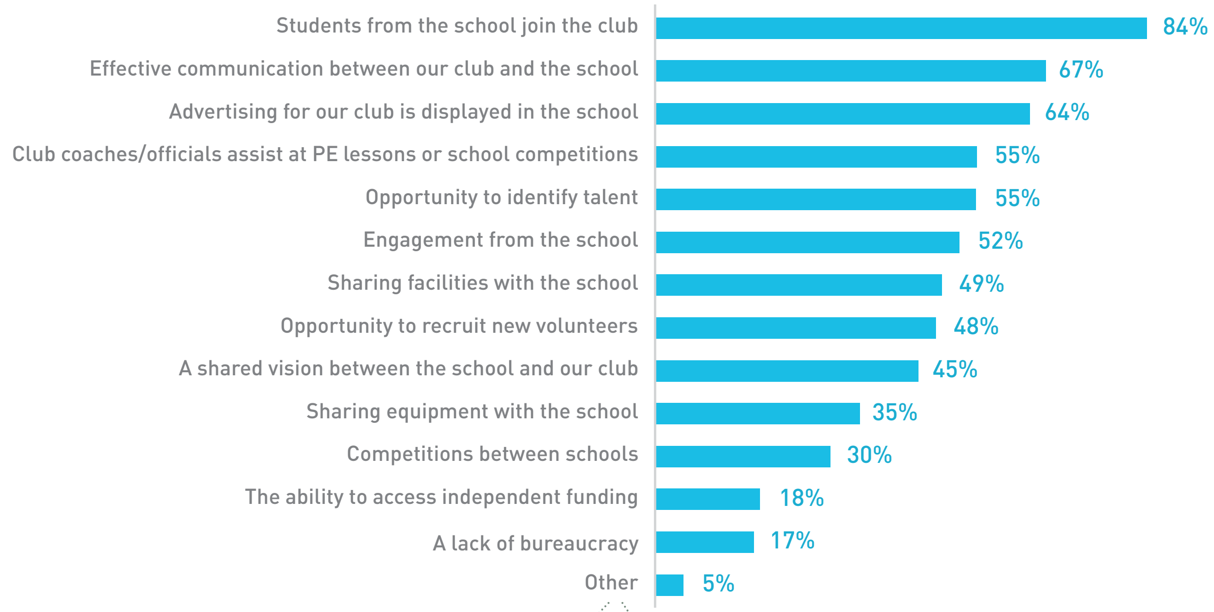
More than half (58%) of sports clubs[34] say they have one or more links with schools in their local community, with almost nine in ten (88%) of these links reported to be successful (n=3,980).

For clubs that have school links (n=1,122) the most important factors for making them successful are around ensuring a real partnership – with the ultimate aim that students from the school become members (84%), that the club and school communicate effectively (67%) and that the club is advertised in the school (64%). Other key factors in determining the success of the relationship are around development – such as the opportunity for clubs to identify talent (55%) and for club coaches and officials to assist with PE lessons or school competitions (55%).

But there are other benefits too, with comments from clubs indicating that they have managed to boost awareness of, and opportunities to participate in, their sport amongst local children by bringing it into schools. Others have demonstrated how running school sessions allows them to integrate more into the community.

MORE THAN HALF (58%) OF SPORTS CLUBS SAY THEY HAVE ONE OR MORE LINK WITH SCHOOLS IN THEIR LOCAL COMMUNITY

Factors for successful club-school links [n=1,122]



"We have put wheelchair basketball as a para sport onto the school PE curriculum, and are also offering it city wide to disabled children who wish to do GCSE as three of their practical options, in playing, coaching and officiating"

"We became part of the community, we don't get vandalism and children feel at home in our golf course"

32 Total level findings for school links are based on weighted data from 1,975 clubs, this excludes ten clubs that are already school clubs and 35 clubs that didn't know.
33 DCMS (2012), Creating A Sporting Habit for Life, A New Youth Sport Strategy.
34 Excluding school clubs.

Where clubs do have links with schools, they are far more likely to have these with a number of schools – almost three in four clubs (72%) with school links (n=1,140) have them with more than one school.

This suggests that where clubs have several school links, they are confident in the approach they are adopting and the outcomes this will have.

Our findings show that for the majority of sports clubs, school links are important for recruiting members and developing the physical skills of young people. This reaffirms the importance of developing links between schools and clubs embodied in the Government's satellite club strategy.

Competitive sport is high on the Government's agenda yet only three in ten (30%) sports clubs working with schools (n=1,122) believe that competition between schools is necessary for them to have good links with schools.

This suggests there may be some disconnect between Government priorities for school sport and the role that clubs play. It is important that the positive school-club links we have seen evidence of in our survey are protected, and fostered under any new Government strategy for school sport. It's also important that the opportunities for both clubs and schools under the new satellite club strategy are maximised.

OUR FINDINGS SHOW THAT FOR THE MAJORITY OF SPORTS CLUBS, SCHOOL LINKS ARE IMPORTANT FOR RECRUITING MEMBERS AND DEVELOPING THE PHYSICAL SKILLS OF YOUNG PEOPLE

COMMUNITY PROJECTS[35]

As reported in the Game of Life (Sport and Recreation Alliance, 2012), the wider benefits of sport and physical activity are far reaching – boosting not just physical and mental health but also providing opportunities to engage young people at risk from antisocial behaviour, enhance social cohesion and boost educational attainment.

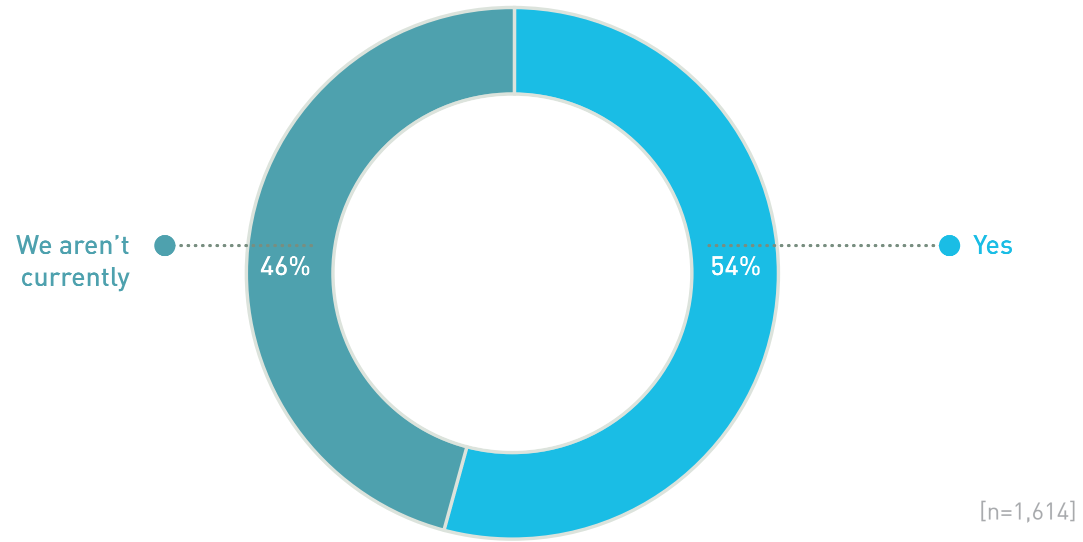
Although there are many charities and projects which exist to deliver sport with these particular aims, sports clubs can also ensure that their activity meets a wider audience or specific goals. The motivations for this may be varied – in some cases good funding is available if club activities are addressing certain problems, but equally sports clubs are typically integrated into the community and for many it is in the nature of what they do to contribute something back.

Positively, we found that more than half (54%) of sports clubs are currently running some sort of programme that engages the wider community, be this aimed specifically at young people or people who have suffered from domestic violence. In line with the Government's key long term objectives, two in five sports clubs (42%) are conducting work aimed at young people and three in ten (30%) are running programmes aimed at improving physical health. Amongst those which are delivering community projects (n=874), this accounts for three quarters (76%) and half (54%) of all projects respectively.

It is possible that there has been some overstatement in response to this question. Although the question was asking specifically about outreach work or sessions/programmes as part of wider community engagement aimed at specific groups, some clubs may feel that they are targeting the wider community simply by running their normal sessions.

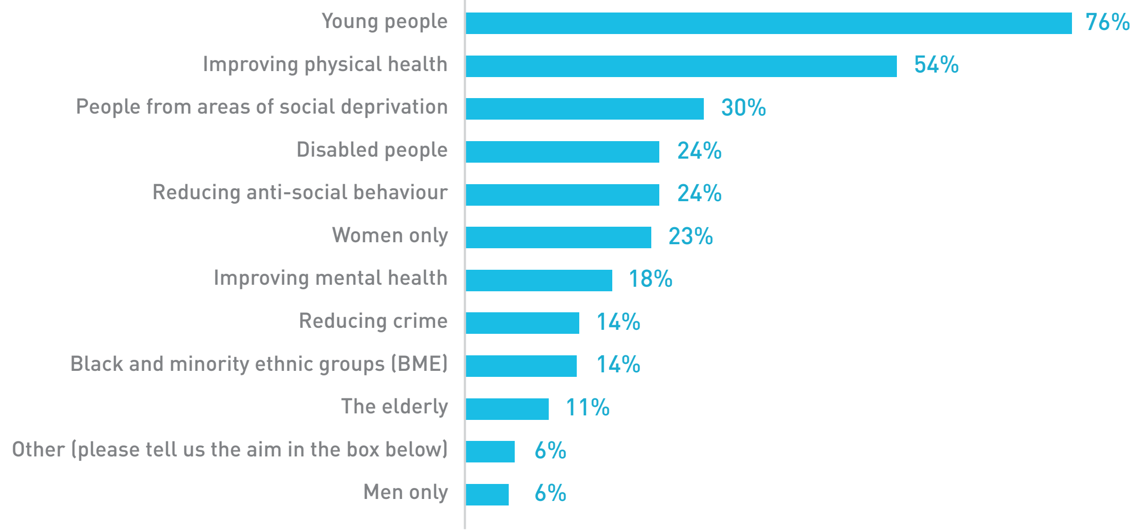
Additionally, although this question was phrased as neutrally as possible some clubs may have wanted to say they were carrying out outreach work due to the perceived social value of this. However, we believe the level of overstatement to be relatively minor here.

Is your club currently running any outreach work or sessions/programmes that are part of wider community engagement?



[n=1,614]

Sections of the community targeted by sports clubs [n=874]



35 Total level findings for community projects are based on weighted data from 1,614 clubs excluding 164 clubs that didn't know.

The focus of these community projects demonstrates that sports clubs are playing a vital role in working with groups that will benefit society and align with Government priorities. The main areas clubs are working in across the board are also those that are important for the Government to address, important for social cohesion and able to be improved by sport.

What's more, six in ten clubs (60%) running single projects in the community (n=476) are entirely self-funding them, with only 9% entirely self-funded by an external organisation(s) and 23% partly funded externally[36]. Within clubs delivering multiple projects 58% of the projects (n=1,354 projects) are funded entirely by the club compared to just 12% funded completely by one or more external organisations and 27% partly funded externally.

The extent to which sports clubs are entirely, or part funding their wider community engagement demonstrates both financial and time commitments by community sports clubs in targeting priority areas for the Government.

CSP, LOCAL AUTHORITY AND NGB SUPPORT[37]

In order to play an important role in their communities, sports clubs often require a certain degree of support. Individual national governing bodies (NGBs) exist for most sports and provide them with guidance, information, training and services – predominantly with a view to supporting them to increase their membership numbers and ultimately grow participation in the sport.

Although many NGBs also tend to operate at a regional or local level, county sports partnerships are the key local level resource for sports clubs, particularly in those sports with smaller NGBs. Another important potential contact for sports clubs is the local authority. In particular, clubs which hire their facilities are more likely to be in touch with their local authority as half of all clubs that hire (52%) do so from this source. For other clubs local authorities can also be a source of funding, signposting and information, as well as potential generators of red tape.

Although the Sports Club Survey was widely promoted whilst in field (see Appendix A – Methodology for more details), due to heavy promotion from NGBs to their members, our sample over-represents affiliated clubs, with some clubs having affiliation to more than one NGB.

[36] Nine per cent of clubs running one project didn't know how they were being funded.

[37] 2,909 clubs were asked about their affiliation to relevant NGBs. Total level findings about the quality of NGB relationships are based on 2,122 NGB relationships from 1,783 clubs. Findings about the quality of CSP relationships are based on 829 clubs which have links with their CSP. Findings about the quality of local authority relationships are based on 1,667 clubs. When asked about having a named contact at their local authority, 2,002 clubs provided data. 349 clubs (17%) responded to this question with don't know. It's likely that the person completing the questionnaire in this instance genuinely does not know the answer but that someone else in their club may have a contact. Therefore to avoid skewing the results the data has been rebased to exclude those which said don't know to give a base of 1,653 clubs. Similarly, 965 clubs responded to the question about a named contact at their CSP, 154 (16%) of which replied with don't know. Findings to this question are therefore drawn from re-based data of 811 clubs.

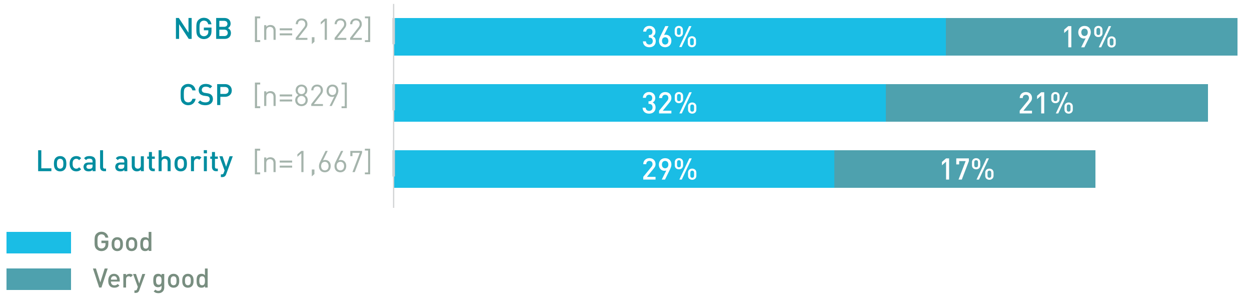
Fifty-five per cent of the relationships sports clubs have with NGBs (n=2,122) are rated as good or very good relationships and a further 30% as average, demonstrating that in the majority of cases NGBs are working well with their clubs. Similarly, 53% of sports clubs (n=829) state that they have a good, or very good, relationship with their local CSP and 31% report this relationship to be average. In the West Midlands (n=83) we see that relationships with CSPs are more likely to be good or very good, with almost two thirds of West Midlands clubs (64%) stating this.

Two thirds of clubs (66%) have a contact at their local county sports partnership. Unsurprisingly, clubs with contacts at their CSP are more likely to have a good relationship with them – almost three in four (72%) of clubs with a named contact (n=509) say they have a good or very good relationship with the CSP compared to only 15% of clubs which do not have a specific contact (n=177).

This shows the importance of genuine local level interaction between CSP staff and sports clubs and would suggest that in the majority of cases CSPs are working well with the clubs in their communities.

FIFTY-FIVE PER CENT OF THE RELATIONSHIPS SPORTS CLUBS HAVE WITH NGBS ARE RATED AS GOOD OR VERY GOOD

Good or very good relationships with NGBs, CSPs and local authorities



RELATIONSHIPS WITH LOCAL AUTHORITIES ARE A LITTLE MORE OPEN TO ROOM FOR IMPROVEMENT

Relationships with local authorities are a little more open to room for improvement, with just under half (46%) of clubs saying they have a good or very good relationship with their local authority and 34% stating that it's average. Interestingly, amongst clubs which hire a facility from their local authority (n=745) they are slightly more positive about the relationship with 49% of these clubs stating the relationship is good or very good and 38% believing it to be average.

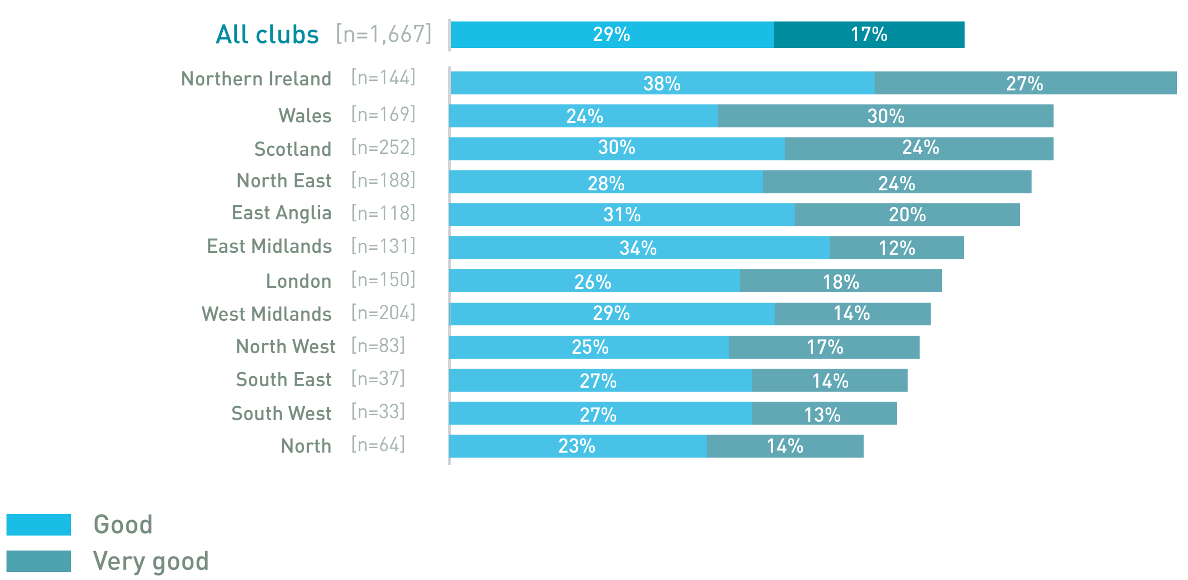
This may be because these clubs have closer interactions with their local authorities by virtue of hiring from them or that the provision of facilities helps to foster a good relationship.

Although it is one of the biggest benefits a local authority can give to a facility owning sports club, the granting of discretionary rate relief appears not to be influencing perceptions around the quality of the relationship, with facility owning clubs which receive no discretionary rate relief more frequently citing the relationship as good or very good.

Fewer clubs (47%) have named contacts at local authorities compared to CSPs and again we see the importance of interpersonal relationships for creating quality connections – seven in ten clubs (70%) which have contacts at their local authority rate their relationship with the authority as good or very good compared to just two in ten clubs (22%) without a contact. This would suggest that there are plenty of local authorities which could begin to build personal links with more sports clubs and that this is likely to foster better relationships.

Clubs located outside of England appear to be more likely to have good or very good relationships with their local authority, with 65% of clubs in Northern Ireland (n=64) and 54% of clubs in Scotland (n=33) and Wales (n=37) reporting good or very good relationships, although some caution should be used given the small base sizes, particularly compared with other regions.

Good or very good relationships with local authorities by region/nation



Another possible resource for sports clubs is inclusivity organisations that provide support and guidance on how to include disabled people in their sport. Although one in five (21%) clubs have connections to, or relationships with, these sorts of organisations three in five clubs (65%) don't have any and the remaining 14% didn't know.

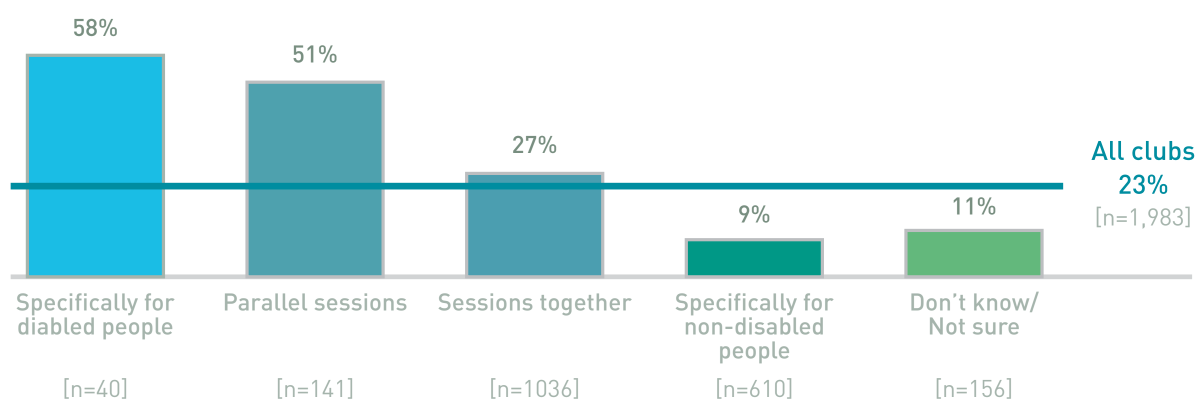
The clubs most likely to have links with inclusivity organisations are mainstream clubs which run parallel sessions for disabled and non-disabled people 58% (n=135) and those specifically for disabled people 45% (n=43).The types of organisations clubs are turning to for this support ranges from CSPs and sporting NGBs (including NGBs for disability sports) to local councils and disability specific or sport specific charities.

However, one in three clubs (32%) would like training from the sector in how to provide for disabled people, suggesting that inclusivity organisations do have an important role to play, but that awareness of them may be low for some sports clubs.

ONE IN THREE CLUBS (32%) WOULD LIKE TRAINING FROM THE SECTOR IN HOW TO PROVIDE FOR DISABLED PEOPLE

Indeed, when presented with 15 different disability organisations that provide advice and support for clubs, only two were known by more than half of all clubs with 56% aware of Special Olympics GB and 53% aware of British Wheelchair Sport.

Connections with organisations providing support and guidance on disability inclusion by club type



SECTION 07

LOOKING FORWARD

LOOKING FORWARD

Finances continue to be a concern for clubs, with 52% worried about accessing funding in the next two years and 58% asking for training and support in applying for funding.

In light of growing memberships, clubs are concerned about being able to provide for members and accommodate new ones. Improving and affording facilities remains high on the agenda and there are concerns around coaching numbers and resource capacity to accept new members.

Despite concerns around increasing facility costs and a lack of coaches, around half of our sports clubs are optimistic about being able to improve their facilities (54%) and train or develop their coaches, staff or volunteers (49%) in the next two years.

SUPPORT AND TRAINING[38]

With increasing adult memberships, volunteers and finances, the 2013 Sports Club Survey findings have shown a more positive picture for sports clubs than in recent years, and clubs are largely optimistic about the future.

However, they are also still in real need of support in key areas, although needs vary depending on the club – perhaps because of their facility set-up, the specific sport, or local circumstances. We are therefore seeing a range of different concerns and priorities for the future amongst clubs.

Clubs were asked to rank the top three ways that the Government could support them. When we combine these scores we see a varied picture with around one in ten clubs looking for the Government to make it easier to apply for Government funding (12%), to encourage young people to be more involved with sport and recreation (11%), to make it more affordable to build a new facility or improve an existing one (11%), to make it more affordable to hire existing sport and recreation facilities (10%) and to take action to reduce the running costs of clubs, such as local rates and utility bills (9%).

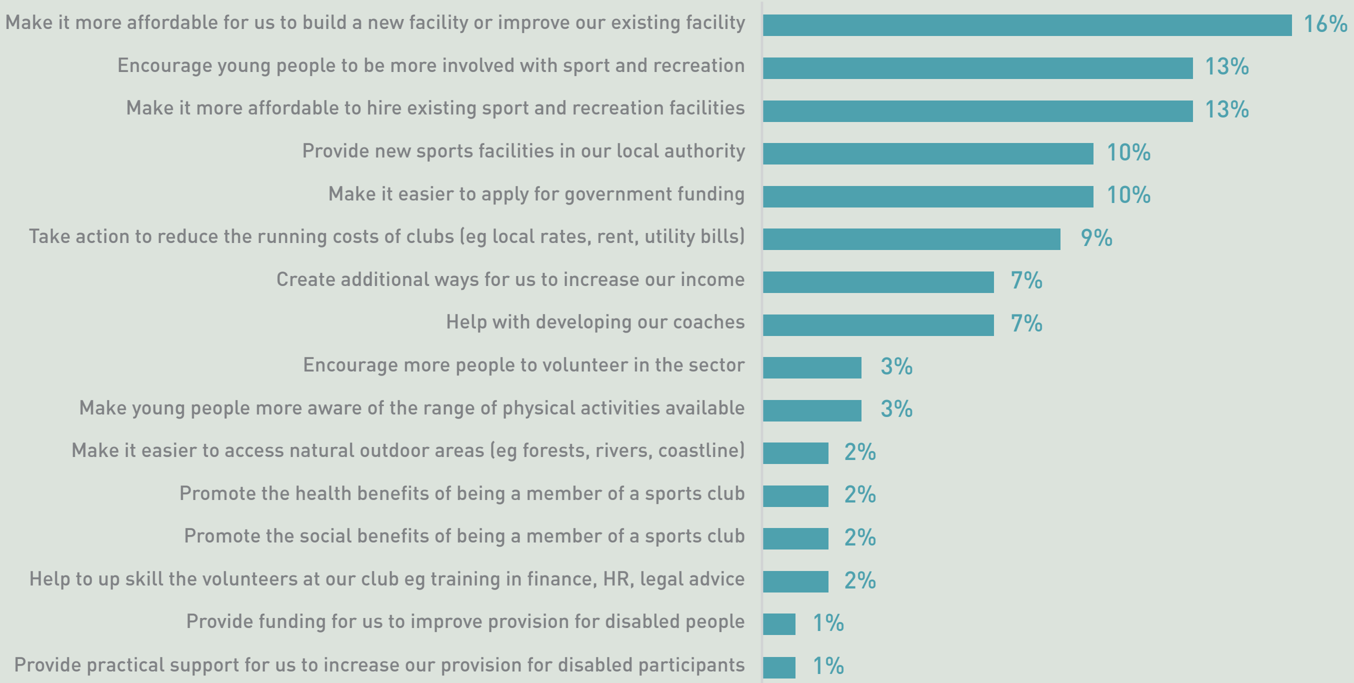
[38] Total level findings for Government support are based on weighted data from 1,939 clubs.

At an overall level, similar numbers of clubs have identified these same five areas as ones where they would like the Government to help, showing that needs can differ greatly by club.

When we focus solely on the number one ask of clubs, these centre more around the affordability and accessibility of facilities. Sixteen per cent say that the number one thing they would like the Government to do to support their club is to make it more affordable for them to build a new facility or improve their existing facility. This is in the context of 15% of clubs stating that over the last 12 months they have carried out less maintenance to their playing or training facilities in order to reduce expenditure, and 11% having reduced the maintenance on their infrastructure facilities.

Thirteen per cent would like facility hire costs to be more affordable and the same number again would like the Government to encourage young people to be more involved with sport and recreation.

Number one ask for Government to support sports clubs [n=1,939]



These findings also accord with those elsewhere in the survey as three in five (63%) clubs which hire have reported an increase in their facility hire costs and at an overall level, junior memberships are declining.

One in ten clubs (10%) say that providing new facilities in their local authority is the most important thing the Government could do for them. In particular, clubs which would like new facilities in their local authority were based in Cornwall Council (n=43), Birmingham City Council (n=24), Sheffield City Council (n=21), Durham County Council (n=16) and Belfast City Council (n=15), Devon County Council (n=15) and Huntingdonshire District Council (n=20).

One in ten clubs (10%) again say their top ask of Government is for it to be easier to apply for Government funding. If offered at minimal cost from within the sport and recreation sector, the number one area that sports clubs would like training and support in is completing funding applications (58%).

This suggests that it needs to be easier for clubs to apply for funding. Often those applying for it will be volunteers already contributing a significant amount of their time to running the club and delivering their activity, not necessarily with a large amount of knowledge relating to funding applications or finances. Additional areas that clubs would like training and support in are recruiting club members (55%), recruiting volunteers (46%) and marketing (45%).

44% OF CLUBS REPORT THAT THEY HAVE BEEN ACTIVELY SEEKING TO RECRUIT NEW MEMBERS

UPCOMING CHALLENGES[39]

The landscape remains challenging for sports clubs in the next two years. Clubs are most likely to identify four (11%), five (10%) or six challenges (11%) facing their club either now, or in the next two years and again we see that clubs are expecting to face a wide variety of challenges to similar extents.

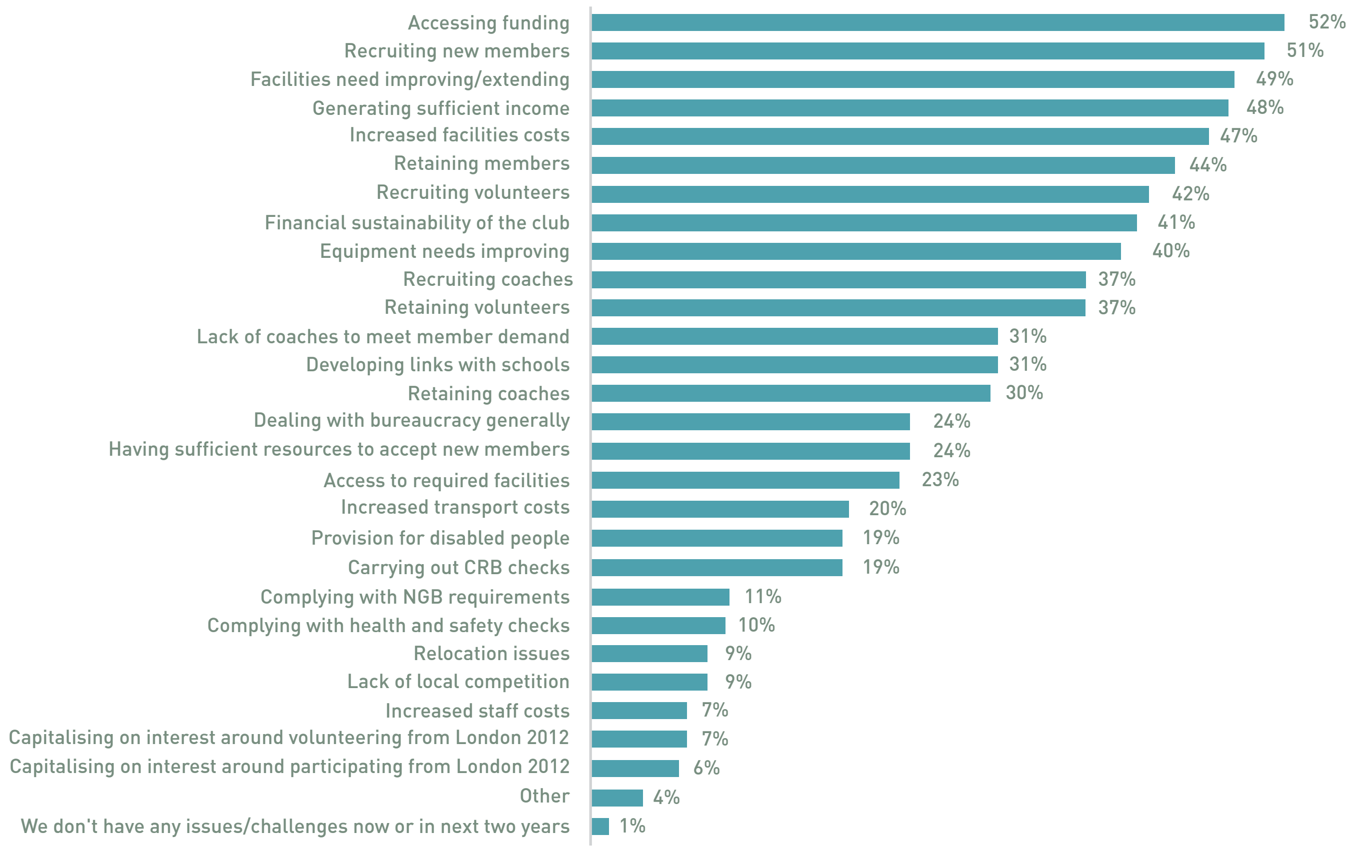
Around half of UK clubs are concerned about accessing funding (52%), recruiting new members (51%), needing to improve or extend their facilities (49%), generating sufficient income (48%) and increasing facility costs (47%).

That is not to say clubs haven't been proactively trying to plan for the future, with 49% of clubs stating that in the last year they have increased their fundraising efforts and 45% reporting that they have applied for more funding in the last 12 months in order to try and increase club income.

In addition, 44% of clubs report that they have been actively seeking to recruit new members for the same purpose. These findings suggest that although the overall picture is more positive for sports clubs, this has not come easily for many clubs and there are still struggles ahead.

[39] Total level findings for upcoming challenges are based on weighted data from 1,949 clubs.

Challenges ahead for clubs in the next two years [n=1,949]



Mid-sized[40] (n=434) and larger clubs (n=386) are more likely to see accessing funding as a challenge in the next two years, with 60% and 65% of these clubs respectively stating this compared to 43% of smaller clubs (n=761).

It's possible that these larger clubs will require greater amounts of funding to keep going or to undertake a specific project, and that such funding pots will be both harder to find and secure.

In keeping with this, smaller clubs are less likely to be worried about generating sufficient income, most likely because their running costs are lower and therefore their definition of sufficient income is relatively more affordable.

Almost three in five large clubs (59%) see income generation as a challenge, as do more than half of mid-sized clubs (54%) whilst 42% of small clubs voice this concern.

[40] Total level findings for upcoming challenges are based on weighted data from 1,949 clubs.

Clubs that run parallel sessions for disabled people and non-disabled people are more likely to be worried about generating sufficient income in the next two years. Three in five (60%) of these clubs identified this as a problem compared to just under half (48%) of all clubs.

Financial sustainability similarly represents a cause of concern in more of the larger clubs, with almost one in two large (48%) and mid-sized (47%) clubs seeing this as a challenge compared to 37% of small clubs.

Previous years have seen clubs mostly concerned about simply staying afloat and continuing to exist, with top challenges focusing on recruiting and retaining members and generating sufficient income. These areas remain primary concerns for clubs, but alongside them, the next two years hold challenges for clubs in relation to their facilities – either in the shape of needing to improve or extend them (49%), or rising associated costs (47%).

However, clubs specifically for disabled people (n=33) are much less concerned about the need to improve or extend their facilities, with only 14% citing this as an upcoming challenge. This is compared to half (49%) of all clubs and two thirds (65%) of clubs which provide specific sessions for disabled people alongside sessions for non-disabled people (n=129).

Unsurprisingly, clubs which own or long term lease their facilities (n=648), or use a combination of owned/hired/public space (n=290) are more concerned with improving or extending their facilities, with 59% and 58% identifying this as an upcoming challenge. This is compared to 39% of clubs which only hire, short term lease their facilities or use public space (n=1,011).

ALMOST THREE IN FIVE LARGE CLUBS (59%) SEE INCOME GENERATION AS A CHALLENGE, AS DO MORE THAN HALF OF MID-SIZED CLUBS (54%)

		Club size by income				Facility status			Club type				
CHALLENGES	ALL CLUBS	Small (<£10k)	Mid-sized (£10k-£30k)	Large (>£30k)	No financial data	Do not own a facility (hire, lease, and/or use public space)	Own or long term lease a facility	Access to a combination of facilities	Clubs specifically for non-disabled people	Clubs specifically for disabled people	Clubs that provide opportunities to take part together	Clubs that provide parallel sessions	Don't know/Not sure
BASE	1949	761	434	386	368	1011	648	290	681	33	965	129	141
Accessing funding	52%	43%	60%	65%	49%	48%	56%	60%	50%	49%	54%	57%	44%
Recruiting new members	51%	55%	51%	46%	49%	49%	56%	47%	52%	56%	49%	43%	65%
Facilities need improving/extending	49%	37%	60%	64%	44%	39%	59%	58%	47%	14%	49%	65%	48%
Generating sufficient income	48%	42%	54%	59%	44%	43%	55%	50%	47%	44%	48%	60%	43%
Increased facility costs	47%	45%	55%	48%	39%	52%	39%	48%	52%	46%	43%	54%	38%
Retaining members	44%	43%	42%	49%	43%	43%	49%	37%	47%	26%	43%	35%	51%
Recruiting volunteers	42%	38%	48%	45%	41%	38%	46%	50%	47%	28%	39%	57%	31%
Financial sustainability of the club	41%	37%	47%	48%	35%	38%	47%	41%	41%	34%	40%	55%	34%
Equipment needs improving	40%	41%	44%	42%	32%	39%	41%	39%	38%	36%	41%	49%	34%
Recruiting coaches	37%	33%	45%	38%	37%	36%	33%	52%	40%	29%	38%	36%	21%
Retaining volunteers	37%	32%	41%	44%	36%	35%	41%	37%	41%	31%	35%	43%	28%
Lack of coaches to meet member demand	31%	28%	37%	31%	28%	31%	27%	39%	26%	21%	35%	38%	20%
Developing links with schools	31%	28%	38%	33%	25%	29%	33%	31%	29%	20%	33%	26%	24%
Retaining coaches	30%	27%	34%	33%	29%	29%	26%	44%	29%	26%	33%	34%	17%
Dealing with bureaucracy generally	24%	19%	21%	39%	22%	22%	30%	20%	20%	22%	27%	30%	20%
Having sufficient resources to accept new members	24%	21%	30%	25%	22%	27%	20%	22%	20%	20%	27%	30%	13%
Access to required facilities	23%	25%	30%	15%	20%	29%	10%	34%	26%	13%	23%	26%	14%
Increased transport costs	20%	20%	20%	18%	19%	18%	19%	25%	18%	46%	19%	30%	18%
Provision for disabled people	19%	16%	22%	26%	17%	18%	23%	19%	12%	15%	24%	29%	15%
Carrying out CRB checks	19%	18%	19%	21%	18%	16%	17%	29%	19%	18%	18%	31%	11%
Complying with NGB requirements	11%	10%	11%	13%	8%	10%	10%	12%	10%	12%	10%	22%	7%
Complying with health and safety checks	10%	6%	7%	22%	12%	7%	15%	11%	9%	8%	12%	10%	7%
Relocation issues	9%	8%	10%	9%	8%	12%	5%	7%	11%	11%	9%	2%	5%
Lack of local competition	9%	11%	8%	3%	10%	10%	7%	6%	7%	26%	9%	10%	10%
Increased staff costs	7%	3%	3%	19%	9%	5%	12%	5%	5%	6%	8%	12%	10%
Capitalising on interest around volunteering from London 2012	7%	5%	6%	10%	7%	5%	10%	6%	4%	0%	8%	18%	1%
Capitalising on interest around participating from London 2012	6%	6%	5%	5%	8%	7%	7%	4%	4%	10%	8%	7%	4%
Other	4%	3%	2%	8%	2%	2%	1%	0%	2%	-	1%	2%	1%
We don't have any issues/challenges now or in next two years	1%	2%	1%	0%	2%	3%	5%	3%	2%	5%	4%	6%	4%

A THIRD (34%) OF CLUBS THAT USE A COMBINATION OF FACILITIES ARE WORRIED ABOUT HAVING ACCESS TO THE FACILITIES THEY REQUIRE IN THE NEXT TWO YEARS

As we would also expect, increased facility costs pose a greater threat to clubs which don't own their facilities (52%, n=1,011), as they are less in control of these than a facility owning club that might for example, be able to swap utility providers to help reduce facility related costs.

A third (34%) of clubs which use a combination of facilities are worried about having access to the facilities they require in the next two years. It's possible that some of these clubs use multiple facilities because the access they have to one isn't sufficient.

Three in ten (29%) clubs which hire, short term lease or access public space are also worried about having access to the facilities they require in the next two years. Here it is more likely that concerns are borne from not being able to book facility space as and when needed, or wider outdoor access issues.

Reflective of their more formalised structure, concerns around increased staff costs come predominantly from larger clubs, one in five (19%) of which believe this to be an upcoming challenge compared to 3% of small and mid-sized clubs. A much greater proportion of large clubs (22%) are concerned about complying with health and safety checks. This is compared to only 6% and 7% respectively of small and mid-size clubs.

These larger clubs are also twice as likely to be worried about dealing with bureaucracy – no doubt because they encounter more of it (39% of large clubs compared to 19% of small clubs). These concerns for larger clubs suggest that there is a danger that over-regulation and red tape present unnecessary challenges as sports clubs grow. The Government should be mindful that if they want more people to be active, they should incentivise sports clubs to grow and become more independent, rather than punishing growth through over-regulation.

Alongside the 21% increase in adult participating membership levels at the average club since 2011, fewer clubs believe recruiting new members will be a challenge in the next two years. This does not however account for the longer term trend we have seen in decreasing junior membership levels, suggesting clubs may feel positive about the 8% increase in junior membership levels seen in the last year. Whilst this was the main challenge identified in 2011 by almost two in three clubs 64% (n=1,942), it is now the second most cited challenge by one in two clubs (51%). This still represents an issue for half of all clubs, however, and is more likely to be a challenge for clubs specifically for disabled people 56% (n=33) and more so for smaller clubs (55%) than it is for larger clubs (46%).

Even though the recruitment of new members is less of an immediate concern for clubs, accommodating existing and new members may still be. Three in ten clubs (31%) believe they may not have enough coaches to meet member demand in the coming two years and one in four (24%) believe that they will be challenged by insufficient resources to accept new members. This suggests that for around three in ten clubs, current or increasing participation levels may be difficult to sustain without appropriate support and resource.

Rowing clubs (n=76) in particular are conscious that they may not be able to support more members with almost three quarters (72%) concerned about a lack of coaches to meet member demand, and 65% stating they are worried about having sufficient resources to accept new members. Other sports worried about sufficiently accommodating new members are archery (n=53) where 59% of clubs see this as an upcoming challenge, and canoeing (n=46), weightlifting (n=12) and wheelchair basketball (n=12) – half (50%) of which have expressed this worry.

In addition to rowing, the sports that are most concerned about a lack of coaches to meet member demand are canoeing 72% (n=46), gymnastics 61% (n=79), athletics 54% (n=57), cycling 50% (n=20) and table tennis 50% (n=20). It is somewhat surprising that all of these sports were featured in the Olympic or Paralympic Games.

In the wider context of increasing membership numbers – which clubs do not necessarily feel are linked to the Games – this may suggest that for those clubs where new participants have been attracted, resource, particularly in the form of coaches, is limited.

One in five clubs (19%) see providing for disabled people as an upcoming challenge, with larger clubs (26%) more likely to be concerned about this. The clubs most worried about providing for disabled people are those which run parallel sessions for disabled and non-disabled people (29%) and those which provide opportunities where disabled and non-disabled people take part in the activity together (24%).

Almost half (46%) of clubs specifically for disabled people (n=33) are worried about increasing transport costs in the next two years, compared to just one in five (20%) of all clubs. More than one in four of clubs specifically for disabled people (26%) are worried about a lack of local competition, compared to just one in ten (9%) of all clubs.

Smaller clubs are also worried about a lack of local competitions – this is almost four times more likely to be an upcoming challenge for small clubs (11%) than it is for mid-sized and large clubs (3%). Clubs specifically for disabled people are also less concerned with retaining members (a challenge for 26% of clubs specifically for disabled people compared to 44% of all clubs) and recruiting volunteers (a challenge for 28% of clubs specifically for disabled people compared to 42% of all clubs).

Alongside the smaller membership numbers that we know clubs specifically for disabled people have, their concerns suggest that these clubs are well set up to deliver their activities – with the majority having good facilities, a core membership base and volunteer support. What these clubs are worried about relate more to how they can operate in the wider sporting environment, with increasing transport costs causing concern as well as a lack of local competition for their members to engage in.

Four per cent of clubs told us that they faced other challenges beyond those listed. These included concerns around poor weather preventing participation, issues with the way in which elite funding for disabled participants is distributed, and difficulties transferring knowledge and enthusiasm to new volunteers or distributing workloads amongst them.

"THE CURRENT FUNDING MODEL FOR ELITE SPORT PREVENTS DISABLED ATHLETES FROM SMALL CLUBS LIKE OURS TO BREAK THROUGH... IN THE LONG RUN THIS WILL KILL THE TYPE OF WORK THAT WE DO, BECAUSE OUR ATHLETES CANNOT AFFORD TO COMPETE AT THE LEVEL THAT THEY NEED AND STAY IN THE SPORT"

- ATHLETICS CLUB

"CRICKET IS A SEASONAL SPORT – LAST YEAR'S WEATHER WOULD HAVE HAD A BIGGER IMPACT ON THE GAME THAN THE OLYMPICS. THIS YEAR'S COLD WINTER EQUALLY MEANT MANY JUNIOR FOOTBALL/RUGBY GAMES CLASH WITH SPORTING CALENDARS. IF KIDS CAN'T PLAY THEY WILL LOSE INTEREST"

- CRICKET CLUB

UPCOMING OPPORTUNITIES[41]

Clubs are most likely to be optimistic about two (16%), three (17%) or four (15%) opportunities when thinking about now and the next two years, although one in ten clubs (9%) aren't able to identify any upcoming opportunities. Smaller clubs (n=747) are less likely to be optimistic about the future with 13% of these reporting no identifiable opportunities for the coming two years compared to 3% of larger clubs (n=374).

Despite concerns around increasing facility costs and a lack of coaches, around half of our sports clubs are optimistic about being able to improve their facilities (54%) and train or develop their coaches, staff or volunteers (49%) in the next two years. As would be expected, clubs which own or long term lease their facilities are more optimistic about upcoming opportunities to improve their facilities with seven in ten (71%) of these clubs stating this (n=780).

Larger clubs (n=374) are also more likely to be optimistic about improving their facilities with three quarters (75%) reporting this to be the case. In terms of coach training and development, eight in ten (79%) gymnastics clubs are excited about this opportunity (n=79), as are around seven in ten swimming clubs 74% (n=49), korfball clubs 72% (n =25), rugby league clubs 70% (n=27) and canoeing clubs 70% (n=46).

[41]Total level findings for upcoming opportunities are based on weighted data from 1,902 clubs.

Opportunities for clubs in the next two years [n=1,902]

More than one in three clubs (36%) also say that they are looking forward to developing their existing links with schools (36%) and the same amount are looking forward to establishing new school links.

Given that more than half of clubs (58%) already have links with schools and the majority of these links (88%) are reported to be successful, this optimism around links with schools in the coming years is extremely encouraging. This suggests that existing good relationships will hopefully be set to continue and new ones will be forged.

This may help tackle the overall declining trend in junior memberships and importantly ensure young people are encouraged to be active from an early age. In addition, one in ten clubs (11%) are looking forward to building links with universities, further reinforcing the role of sports clubs in the wider community.

One in five clubs (21%) say that they see increasing the number of disabled people who are members as an opportunity in the next two years. Unsurprisingly, this is considerably higher amongst clubs specifically for disabled people, where three in four (74%) see this as an opportunity (n=37). This is the same for clubs which run parallel sessions for disabled and non-disabled participants of which 55% of see this as an opportunity in the near future (n=126).

Sports that are the most enthusiastic about increasing numbers of disabled members are boccia, with 85% of clubs stating this (n=13), 58% of wheelchair basketball clubs (n=12), 42% of karate clubs (n=12) and 40% of archery clubs (n=52).

Clubs specifically for disabled people are also more optimistic about promoting competitions and events, with two in five (41%) stating this as an upcoming opportunity compared to one in three (32%) of all clubs. This is in contrast to the 26% of clubs specifically for disabled people who are concerned about a lack of local competition in the coming years.

OPPORTUNITIES	ALL CLUBS	Club size by income: Small (<£10k)	Mid-sized (£10k-£30k)	Large (>£30k)	No financial data	Facility status: Do not own a facility (hire, lease, and/or use public space)	Own or long term lease a facility	Access to a combination of facilities	Club type: Clubs specifically for non-disabled people	Clubs specifically for disabled people	Clubs that provide opportunities to take part together	Clubs that provide parallel sessions	Don't know/Not sure
BASE	1902	747	429	374	353	988	636	279	665	37	945	126	129
Improving our facilities	54%	43%	57%	75%	50%	21%	23%	9%	52%	14%	55%	60%	55%
Training and developing our coaches/staff/volunteers	49%	48%	52%	49%	49%	26%	15%	8%	45%	33%	52%	58%	45%
Securing grants for voluntary organisations	41%	37%	48%	47%	35%	21%	13%	7%	37%	46%	43%	49%	35%
Developing existing links with local schools	36%	31%	42%	44%	31%	18%	13%	6%	30%	21%	39%	59%	31%
Increasing the number of volunteers	36%	31%	42%	41%	32%	17%	13%	6%	35%	24%	36%	51%	28%
Establishing new links with local schools	36%	35%	36%	41%	33%	18%	12%	6%	34%	30%	37%	50%	28%
Promoting competitions and events	32%	31%	26%	33%	39%	17%	10%	5%	22%	41%	38%	42%	31%
Formulating a development plan	26%	24%	25%	30%	28%	14%	7%	5%	23%	12%	28%	26%	32%
Increasing the number of disabled people who are members	21%	18%	23%	25%	23%	10%	8%	4%	7%	74%	27%	55%	8%
Freedom within the sport (less red tape)	20%	20%	19%	21%	22%	10%	6%	3%	18%	6%	22%	29%	14%
Establishing links with universities	11%	12%	11%	9%	11%	6%	3%	1%	7%	13%	12%	21%	15%
Capitalising on interest around volunteering from London 2012	8%	9%	7%	8%	9%	4%	3%	1%	5%	1%	10%	13%	6%
Other opportunity	4%	4%	3%	4%	2%	2%	1%	1%	3%	3%	4%	7%	5%
No identifiable opportunities	9%	13%	7%	3%	12%	6%	3%	1%	12%	7%	8%	3%	12%

Clubs that provide parallel sessions for both disabled and non-disabled participants (n=126) are on the whole more optimistic than the average UK club. Three in five (58%) are looking forward to developing existing links with local schools, compared to just over one in three (36%) of all clubs. A similar number (58%) of these clubs identified training and developing their staff/coaches/volunteers as an opportunity, compared to one in two (49%) of all clubs.

The larger memberships at clubs which run specific sessions for their participants combined with their perceptions of upcoming opportunities suggest that these clubs are larger and more stable. They may therefore be better placed to deliver a core offer to both disabled and non-disabled participants whilst growing their club and skills base.

Although 36% of clubs are hopeful about increasing the number of their volunteers, fewer than one in ten clubs (8%) say that capitalising on interest around volunteering from the London 2012 Olympic and Paralympic Games represents an opportunity for them. Amongst clubs specifically for disabled people (n=37), only 0.6% believe this to be the case. This is also in the wider context of three quarters of all UK clubs (73%) reporting that no new volunteers joined their club directly after the Games. All in all, this suggests that a lasting volunteer legacy from the Games may be unlikely, particularly for sports that didn't take part in the Games and in disability clubs.

"SEEING SOME OF OUR COMPETITORS REACH AND ACQUIT THEMSELVES WELL IN THE BRITISH CHAMPIONSHIPS GO ON TO BECOME INTERNATIONALS"

- GYMNASTICS CLUB

The sports that are clearly more optimistic about gaining new volunteers that have been inspired by the Games are all Olympic or Paralympic sports with 42% of wheelchair basketball clubs excited about this (n=12), 33% of table tennis clubs (n=21), 26% of fencing clubs (n=27), 22% of volleyball clubs (n=41), 21% of cycling clubs (n=19) and 20% of rowing clubs (n=75).

Mid-sized (n=322) and large clubs (n=245) are more likely to say that increasing their volunteer numbers is an upcoming opportunity with 42% and 41% respectively looking forward to this. This may be related to a greater need for volunteers and the desire to use a wide range of volunteer resource given their size.

Four per cent of clubs stated that they had other opportunities on the horizon than those listed. These included the possibility of capitalising on future major events such as the Glasgow 2014 Commonwealth Games, Sochi 2014 Winter Olympics or the 2015 Rugby World Cup as well as elite or competitive success and using new facilities to increase club sustainability.

APPENDIX

APPENDIX A - METHODOLOGY

THE SURVEY

The Sport and Recreation Alliance has conducted the Sports Club Survey biennially since 2007.

The 2013 Sports Club Survey was an online questionnaire available for any sports club in the UK to complete between 1 April and 30 June 2013. It took between 20 and 40 minutes to complete.

National governing bodies which are members of the Alliance were invited to include up to five sport specific questions which they asked their clubs as well as 24 general questions.

The survey covered:

- club organisation and activity or activities
- staff and volunteers
- members
- facilities
- finances
- relationships in the sport sector
- club development, challenges and opportunities
- sport specific questions.

SURVEY PROMOTION

The survey was widely promoted by the Alliance and through Alliance members via direct e-mails, newsletters, websites and social media.

All of the County Sports Partnerships and the sport representative bodies for Wales, Scotland and Northern Ireland were asked to promote the survey. Entry into a number of prize draws and a free energy audit were offered as incentives to encourage clubs to complete the survey.

APPENDIX B - SAMPLE AND CLUB TYPES

SURVEY SAMPLE AND WEIGHTING

After quality checking and removing duplicates 2,910 responses were received. These have been weighted to reflect the estimated profile of 151,000 sports clubs in the United Kingdom in order to make the results representative and to ensure consistency with previous Sports Club Surveys.

The weighted total is 2,909. As in previous years, the weights were calculated using the number of affiliated clubs to different national governing bodies. All of the total level results are calculated using weighted data. Community Amateur Sports Club scheme (CASC) and sport specific data is unweighted.

Not all clubs answered all questions. Base sizes for total level findings are included as footnotes at the beginning of each section. Further breakdowns of base sizes, where applicable, are included in the text as (n=). Base sizes should be referred to when examining data.

Sport specific data is unweighted and provided generally where the number of responses from that sport exceed ten. Exceptions to this are when the base size is known to be more than 10% of the sports clubs within this sport, despite being lower than ten.

This highlights that caution should be exercised when looking at sport specific data as a seemingly small sample may proportionally represent a large number of clubs within a sport, such as in baseball/softball, whilst a seemingly high sample figure can represent a very small proportion of clubs within that sport, for example, football.

The survey was completed by more than 100 different types of sport. The table below indicates sports where at least two responses were achieved.

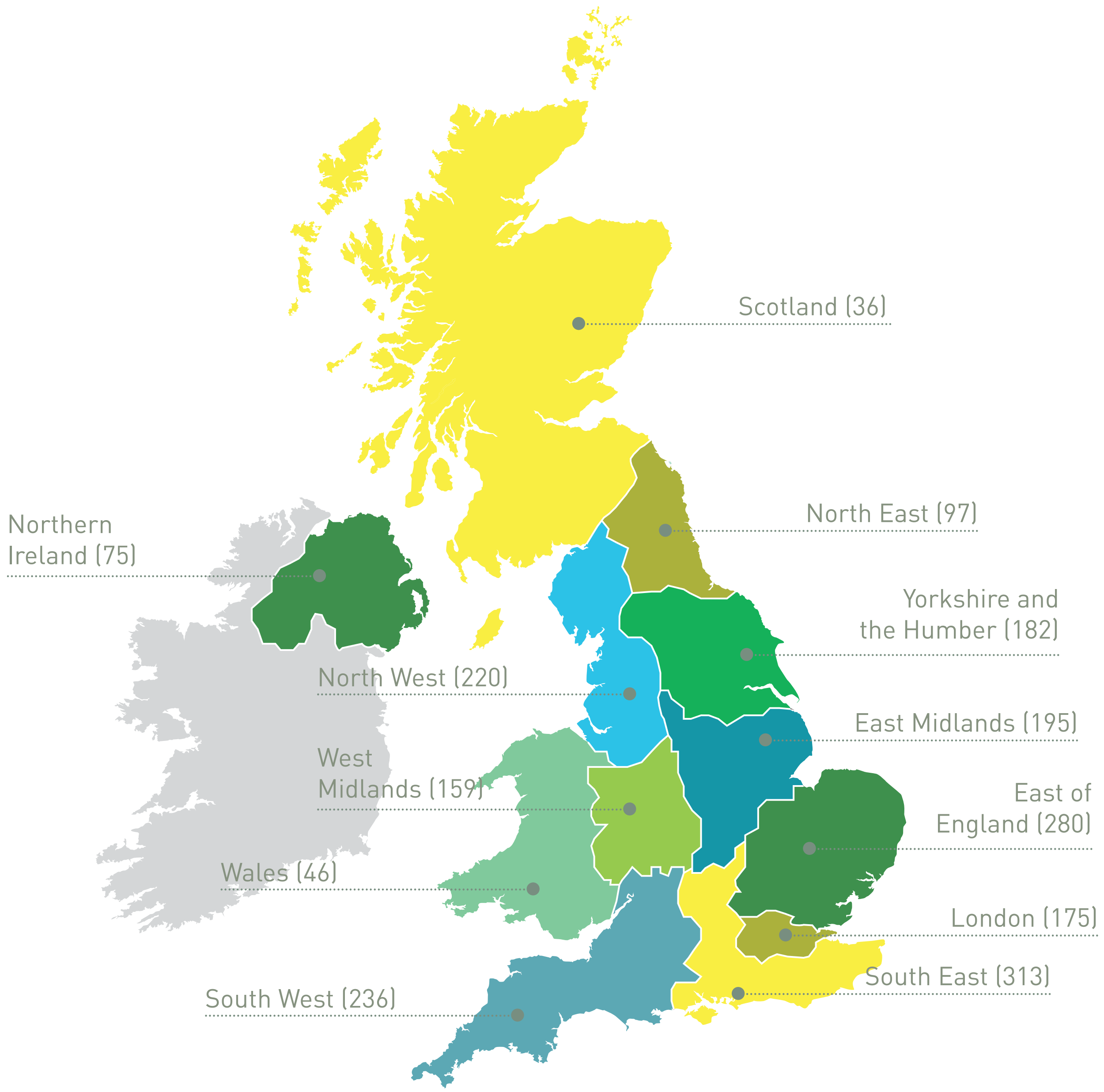
AS IN PREVIOUS YEARS, THE WEIGHTS WERE CALCULATED USING THE NUMBER OF AFFILIATED CLUBS TO DIFFERENT NATIONAL GOVERNING BODIES

Main sport	Sample	Main sport	Sample
Cricket	427	Fencing	39
Rugby Union	361	Badminton	39
Football	225	Gliding	37
Gymnastics	125	Netball	37
Rowing	115	Korfball	33
Tennis	100	Motor sports	31
Basketball	99	Table tennis	29
Bowls	98	Cycling	28
Archery	88	Snowsports (skiing and snowboarding)	27
Athletics (includes running)	79	Judo	26
Hockey	79	Shooting	20
Angling	73	Weightlifting	18
Swimming (includes aquatics and diving)	72	Karate	17
Canoeing	63	Golf	15
Sailing (includes windsurfing)	56	Tchoukball	15
Volleyball	52	Boccia	15
Horse riding/equestrian	47	Triathlon	14
Rugby League	41	Wheelchair basketball	14
Taekwondo	40	Orienteering	12

Main sport	Sample	Main sport	Sample
Baseball/softball	11	Other air sports (exc. Gliding)	5
Squash and rackets	12	Ju jitso	4
Gaelic football	10	American football	3
Multi-sport (unable to choose main activity)	10	Goalball	3
BMX	8	Lacrosse	3
Cheerleading	7	Life saving	3
Wrestling	7	Handball	2
Surf life saving	6	Kurling	2
Mountain biking	6	Mountaineering/climbing	2
Roller sports	6	Wakeboarding/waterskiing	2
Sub aqua	6	Wheelchair football	2
Aikido	5	Kayaking	2
Boxing	5	Disc Golf	2
Kickboxing	5	Model boats	2
Martial arts	5	Greenlaning	2
Hurling/camogie	5	Other	51

The survey was open for completion by clubs across the United Kingdom. The map below shows the geographical spread of unweighted responses received.

In particular, Scotland, Wales and Northern Ireland have small base sizes, as does the north east. Any references to these in the report should be treated with caution as a result.



Throughout the report we refer to different types of club, as defined by clubs themselves when completing the survey. The responses from each club type are detailed in the table below. The phrase 'mainstream clubs' in this report refers to both clubs that provide opportunities for disabled and non-disabled people to participate together, and clubs that provide specific sessions for disabled and non-disabled people.

The base size for clubs specifically for disabled people is low and comparisons made to these clubs should be treated with caution. Despite the low base size, these have been included in the data given that the total universe of clubs specifically for disabled people is unknown and therefore there is a chance that this data is reasonably representative, but also because there is a lack of data of this nature and the figures, even if treated cautiously, provide an interesting break for analysis.

THROUGHOUT THE REPORT WE REFER TO DIFFERENT TYPES OF CLUB, AS DEFINED BY CLUBS THEMSELVES WHEN COMPLETING THE SURVEY

Responses received by club type			
Base	Unweighted	2,910	100%
	Weighted	2,909	100%
And which of the following best decribes your club?	We're a club that provides opportunities where disabled and non-disabled people take part in our activity together	1,327	45.6%
	We're a club specifically for non-disabled people	1,057	36.3%
	Don't know/Not sure	243	8.4%
	We're a club that provides specific sessions for disabled people alongside sessions for non-disabled people	215	7.4%
	We're a club specifically for disabled people	68	2.3%

The following table shows the total number of unweighted responses by CASC, charity and Clubmark accredited clubs. Given that particular sports are more predominant within the CASC scheme and our data is weighted we refer to CASCs as unweighted in order to not distort the data artificially.

In addition, CASCs are over-represented in our sample, which represents 10% of the total number of CASCs out there, we are therefore able to use this unweighted data confidently.

	Number of responses	Percentage of sample
Registered CASC	683	23%
Registered charity	279	10%
Clubmark accredited	1,200	41%

*Please note that while clubs can be Clubmark accredited and a CASC or a charity, clubs cannot be a CASC and a charity.

Some data is explored with regard to club size as determined by income. These definitions have been used in keeping with earlier Sports Club Surveys. They are based on the income figures given for the latest financial year by clubs. Small clubs are defined as those with an income of less than £10,000.

Mid-sized clubs are those with an income of between £10,000 and £30,000 and large clubs are those with an income of more than £30,000. Clubs which haven't provided this information are excluded from this breakdown for the purpose of analysis and reporting, although this data is included for completedness.

COMPARISONS WITH EARLIER SPORTS CLUB SURVEYS

On the whole, the 2013 Sports Club Survey gathered data for the current year (2013) and this time last year (2012). This is with the exception of income and expenditure figures, including calculations relating to clubs in surplus, deficit or breaking even. For income and expenditure figures, the financial years asked about in the survey are the club's last full financial year and the one before this. These are assumed to be 2012 and 2011 respectively either as calendar years or financial years.

Where clubs provided a date for their last financial year end, for eight out of ten clubs this included expenditure in 2012 suggesting that in the majority of instances this assumption is appropriate. Therefore, consistent to the approach taken in the 2009 and 2011 Sports Club Surveys we have treated the data provided as relating to 2012 and 2011 respectively.

Where financial figures are compared with previous years, they do not account for inflation. With the exception of club income and expenditure figures, data for 2009 is not held. The 2009 Sports Club Survey provides data for the two full years prior (2008 and 2007).

This approach changed in the 2011 survey which with the exception of club income and expenditure figures referred to the current year and the one prior, providing 2011 and 2010 data. The same approach has been adopted in the 2013 survey, providing 2013 and 2012 data.

The introduction of new questions in 2013 means that in some instances comparisons with earlier club surveys are not possible.

In terms of how questions have been asked, junior membership fees have been recorded differently in the 2013 survey. In 2011, the question referred specifically to junior participating members while in 2013 the question related to all junior members. Therefore, the figures are not directly comparable although comparisons have been made across time with junior membership fees.

THE INTRODUCTION OF NEW QUESTIONS IN 2013 MEANS THAT IN SOME INSTANCES COMPARISONS WITH EARLIER CLUB SURVEYS ARE NOT POSSIBLE

LIMITATIONS

There is no census information on the total number of sports clubs in the UK, nor the total number of clubs in existence for each sport. Therefore the weights calculated to make the data more representative are necessarily based on the best estimates available.

Because one of the main ways in which the survey was promoted was through national governing bodies the results over-represent the situation of clubs which are affiliated to a national governing body.

Proportional to the total number of clubs within a particular sport, the survey received low numbers of responses for some sports. Base sizes should be referred to when working with the individual sport results.

The form of the survey as an online questionnaire means that the research is reliant on one person to complete the survey on behalf of their club. This means that the views expressed are likely to reflect those of the individual completing the survey and may not be representative of the views of the club as a whole.

Although the survey was promoted across the UK, the vast majority of responses have been received from English clubs (92%, see figure 1.1 above) and therefore the views of English clubs are overrepresented in the survey.

Larger and/or more formal clubs are likely to be over-represented in the survey as a result of the method of sampling through national governing bodies as these clubs may be likely to be more engaged with their national governing bodies.

PROPORTIONAL TO THE TOTAL NUMBER OF CLUBS WITHIN A PARTICULAR SPORT, THE SURVEY RECEIVED LOW NUMBERS OF RESPONSES FOR SOME SPORTS

SPORT+ RECREATION ALLIANCE

4TH FLOOR
BURWOOD HOUSE
14-16 CAXTON STREET
LONDON SW1H 0QT

T 020V 7976 3900
F 020 7976 3901

INFO@SPORTANDRECREATION.ORG.UK
WWW.SPORTANDRECREATION.ORG.UK
@SPORTRECTWEETS