

Sport and Recreation Alliance Sports Club Survey 2011

Report for the Royal Yachting Association



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ALLIANCE

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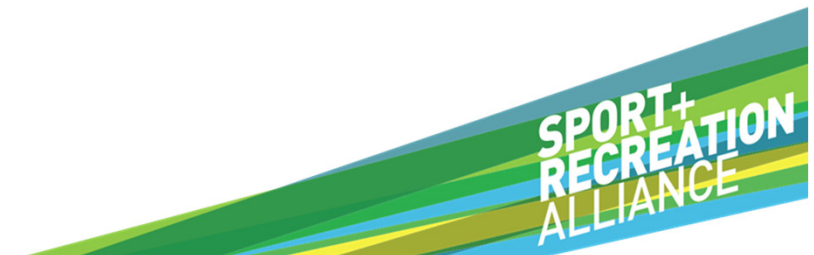
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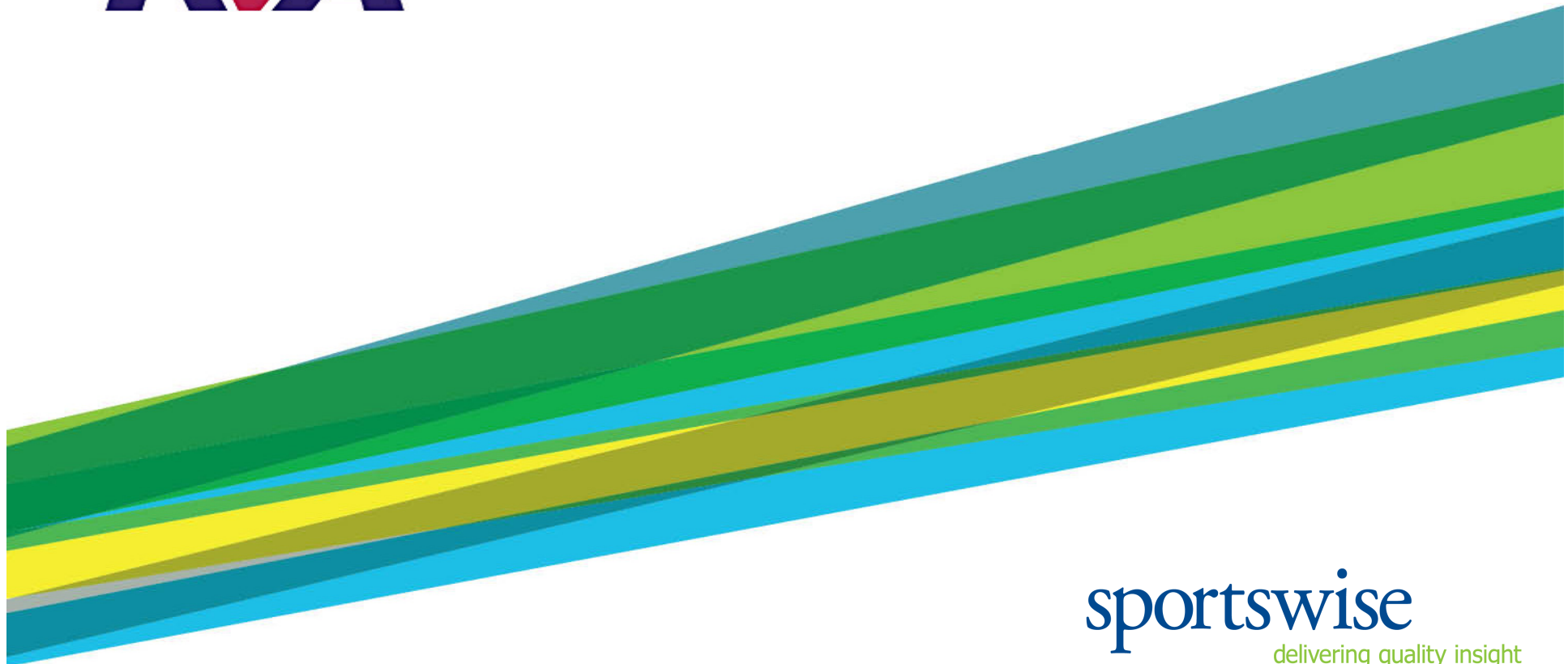
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Introduction



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Introduction



RYA This report provides summary results for the Royal Yachting Association from the 2011 Sport and Recreation Alliance Sports Club Survey

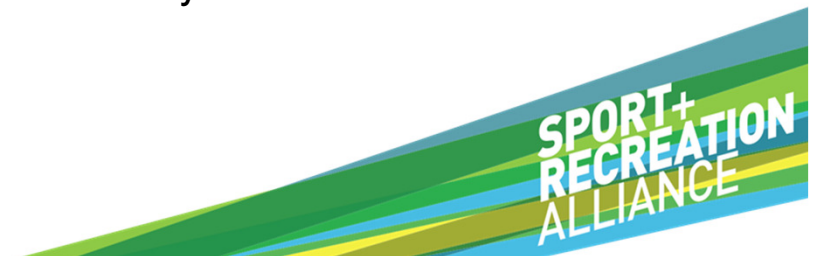
RYA The focus of the survey is to provide a comprehensive overview of sports clubs in the UK across key areas of operation. These include facilities and membership, finances and an insight into the challenges faced by sports clubs

RYA The content of this report is specific to sailing and provides analysis to illustrate the spread of results and a comparison against all sports clubs to give context to the data

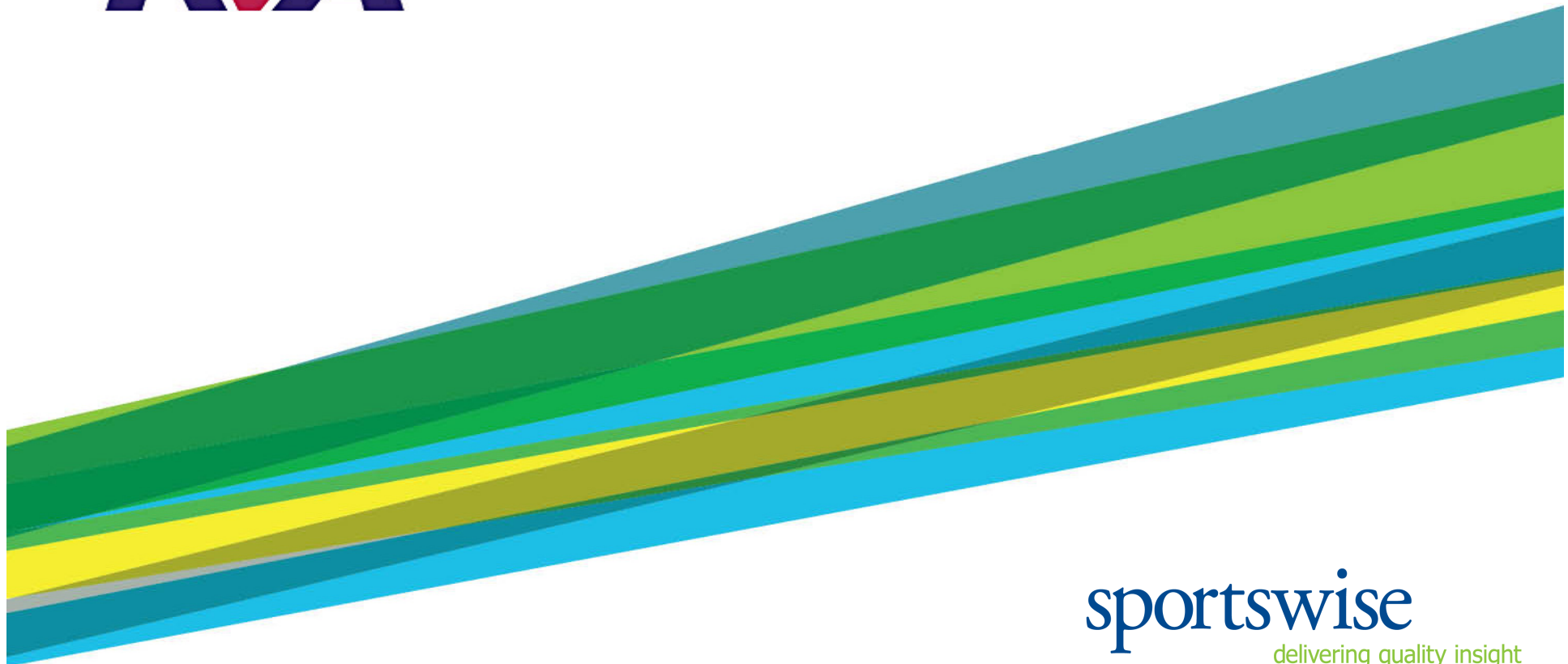
RYA The survey received responses from 109 sailing clubs in total, and 1942 responses in total across all sports

RYA We refer to average results for sailing against a weighted representative base for all sports

RYA Results based on fewer than 50 responses should be treated with caution. In all cases results have been based on the number of answers provided by respondents. In some instances these vary depending on structure and availability of information within the club



Executive Summary



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Executive Summary

SAILING CLUBS



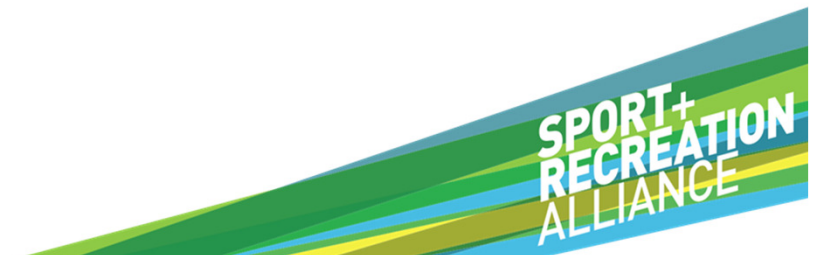
RYA All sailing clubs, in this survey, are affiliated to the RYA. Of these, **nearly 9 in 10** agree that the NGB represents 'value for money'

RYA The average club income stands at **£52,651**, down from **£59,791** in 2009 –an average decrease of **£7,140** in income

RYA Expenditures (costs) have increased within sailing –up to **£47,785**, from **£45,325** –a running cost increase of **£2,460** on average

RYA Consequently, surplus funds have decreased from an average of **£13,958** in 2009 to **£3,775** in 2010. If the same pattern continues it is possible many clubs will be running/operating at a deficit in the near future

RYA **3 in 5** (63%) sailing clubs operate with a surplus compared to **1 in 2** (49%) sports clubs at large



Executive Summary

SAILING CLUBS



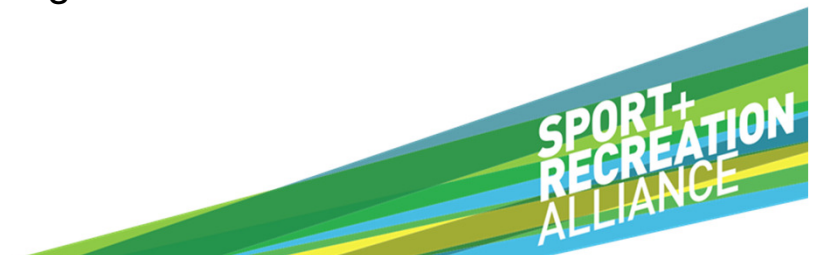
RYA Recruiting new members (**72%**) and retaining members (**64%**) are the key challenges faced by sailing clubs, whilst developing skill sets (e.g. coaches ,training) is seen as a considerable opportunity for almost half (**47%**)

RYA 'Active' adult club memberships stands at **181** members in 2011, and **61** social members – a combined average of **242** members per sailing club

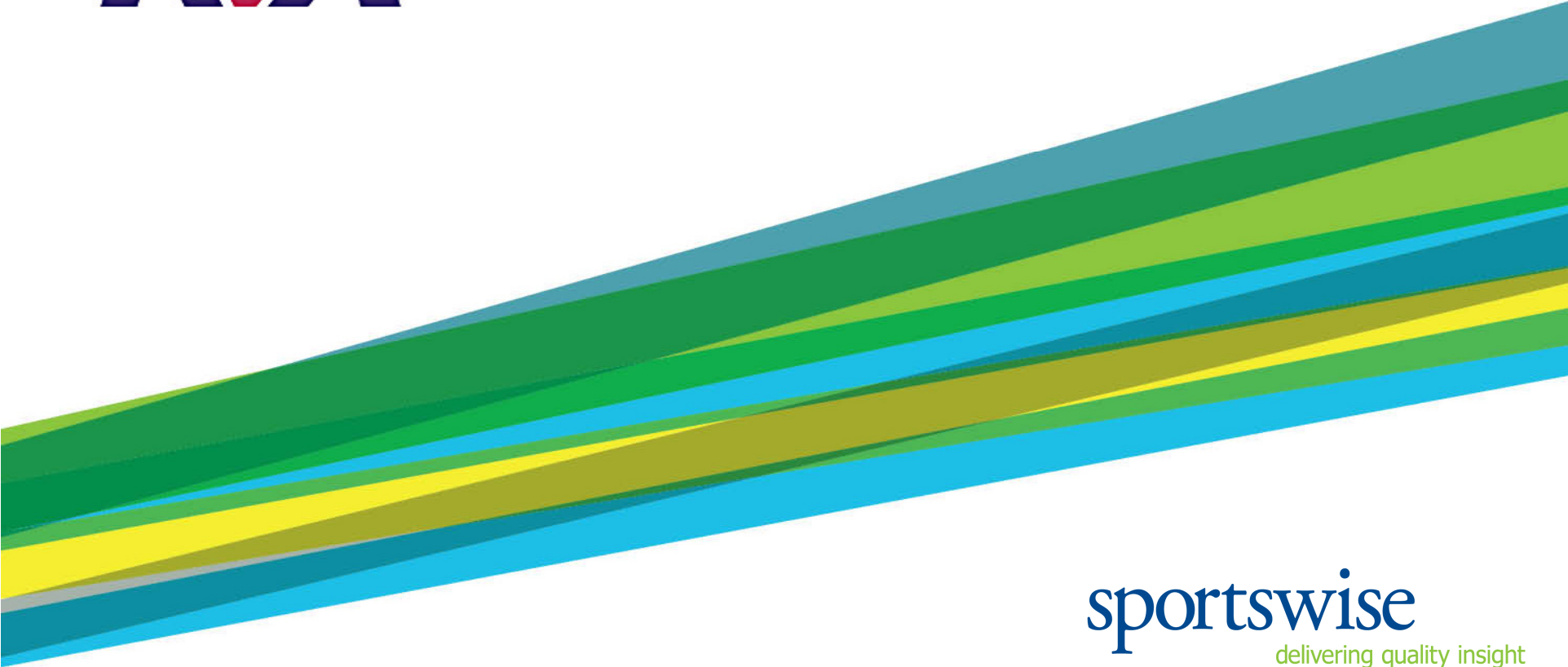
RYA The average club has **66** volunteers (the same as in 2010). On average there are **2** full time/part time members of staff and **56%** of clubs have a person who is a formally designated volunteer co-ordinator

RYA Overall **28%** of clubs are growing their adult membership (in 5 or more members joining the club over the last 12 months), and **23%** are contracting (a fall of 5 or more members) indicating overall growth in memberships of **5%**

RYA **2 in 3** sailing clubs (**68%**) use public space to participate in the sport. Compared to 2009 we see more clubs leasing their facilities than owning them



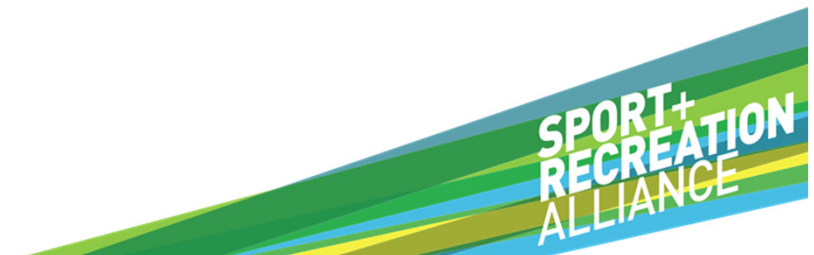
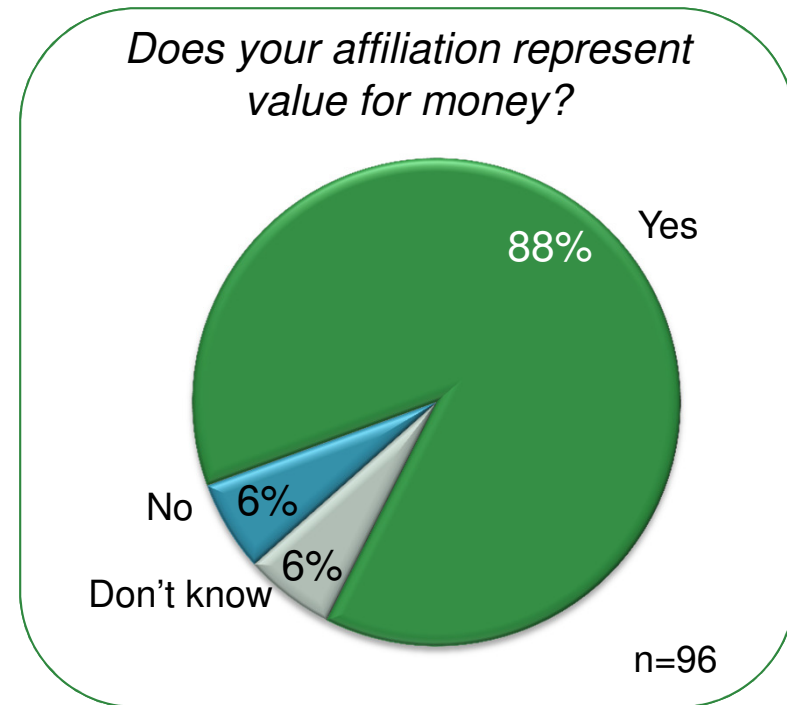
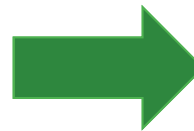
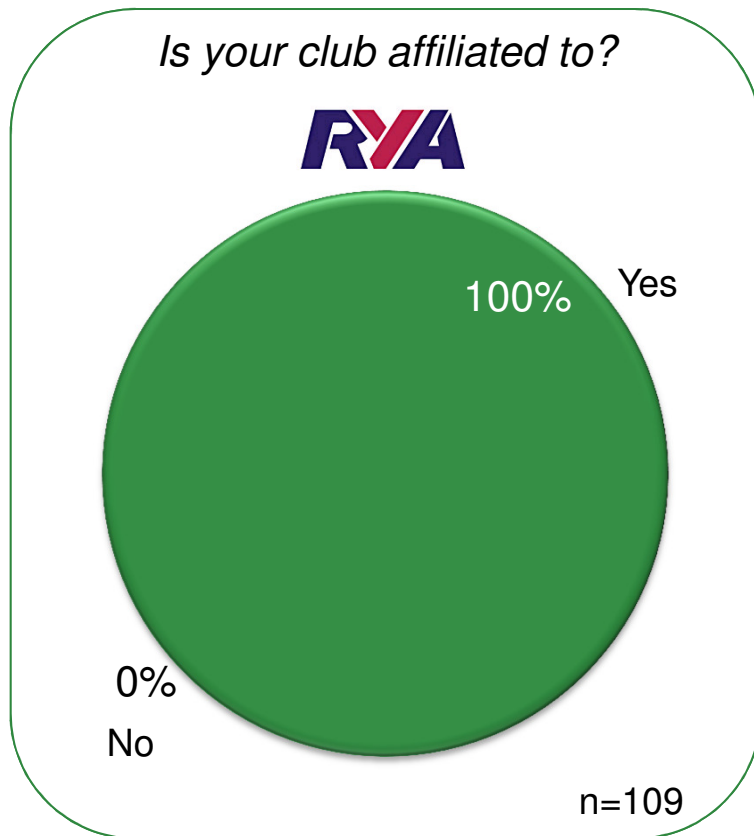
Sport Specific Questions



Affiliation & Value for Money

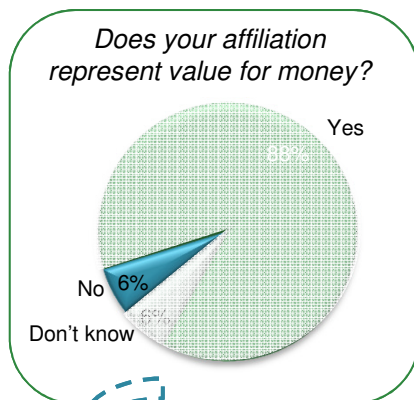


All the sailing clubs we surveyed are affiliated to the RYA. Of these, almost **9 in 10** agree that the NGB represents 'value for money'



Poor Value Perception

1 in 10 clubs do not consider the NGB to offer value for money



"They are not relevant to our needs"

"We pay a subscription but feel we do not get much in return"

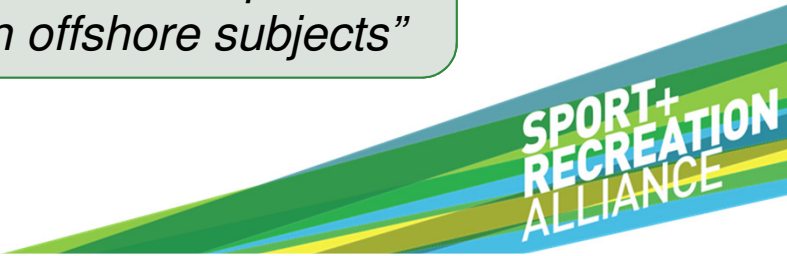
"They don't represent inland clubs"

Why is value for money poor?

"The RYA do nothing for us. When we needed help we were ignored"

"They do not seem to get the headlines"

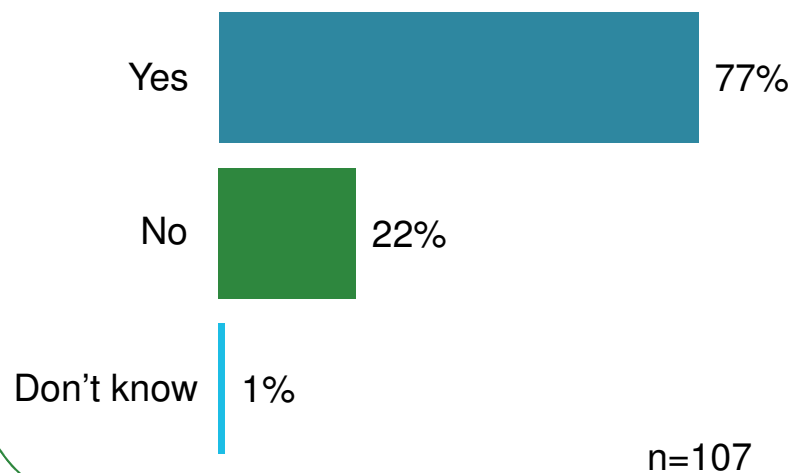
"Not enough attention is paid to inland dinghy sailing clubs. The PYN system needs reviewing and racing rules are too complicated. Regional association spends too much time on offshore subjects"



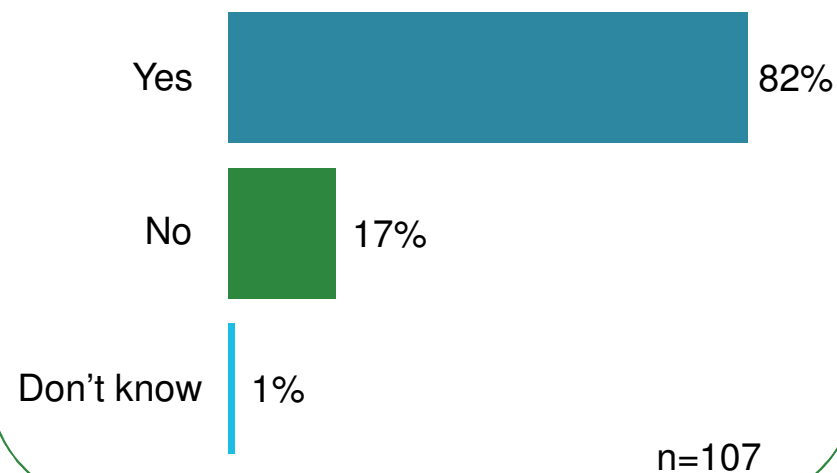
Junior Participation

3 in 4 clubs (**77%**) run programmes or activities specifically to encourage children to participate regularly, whilst **4 in 5** (**81%**) consider the recruitment of junior members essential to the clubs future viability

Does your sailing club run programmes or activities specifically to encourage children to participate regularly at the sailing club?



Does your sailing club consider the recruitment of junior members essential to the clubs future viability?

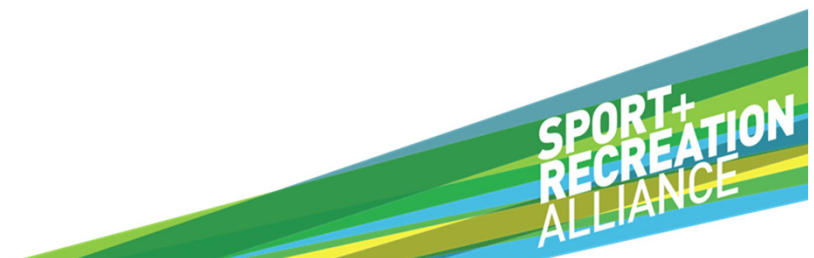
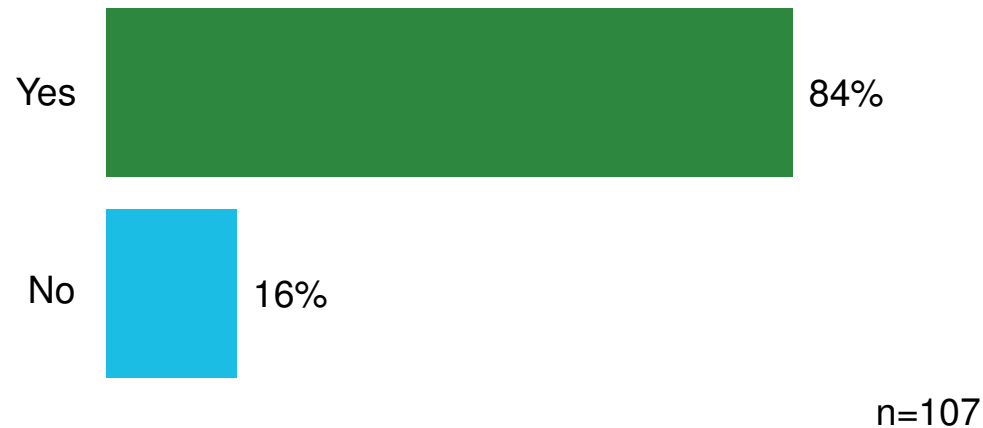


Encouraging Participation

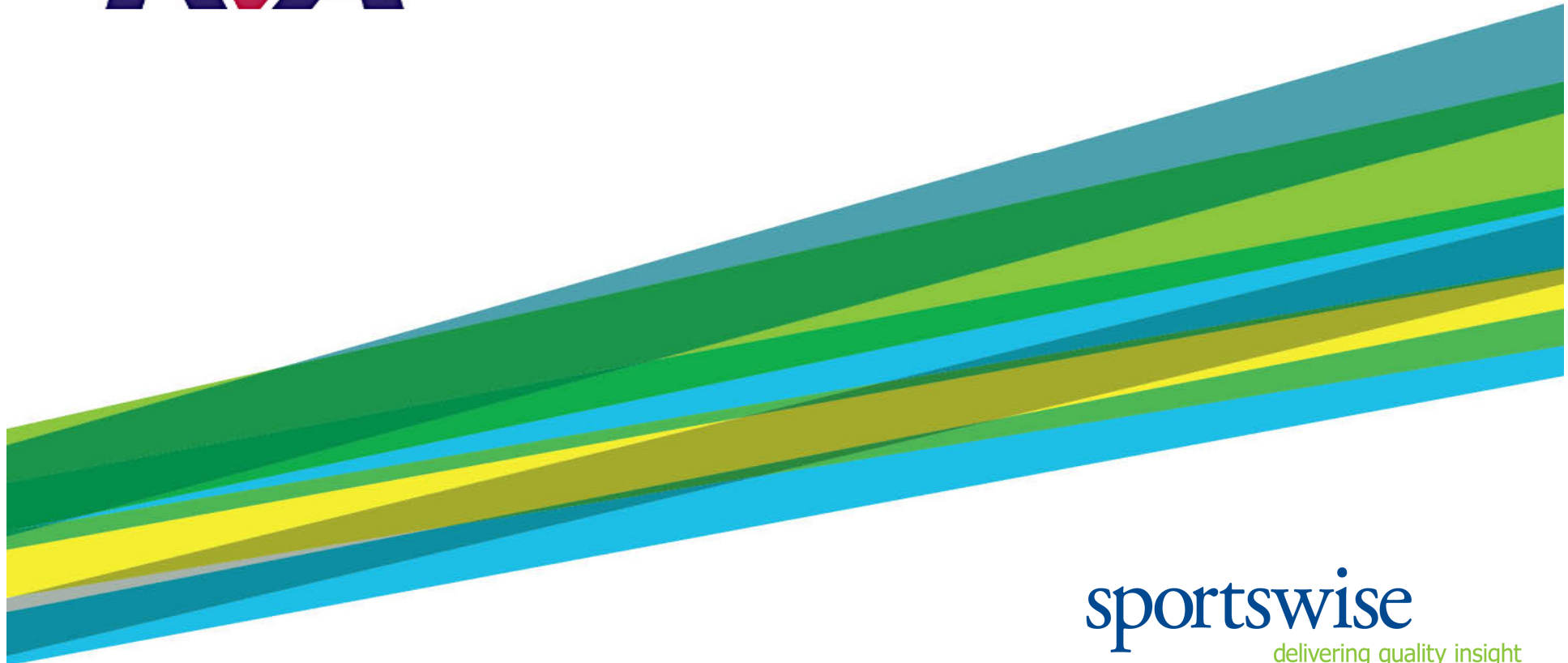


More than 8 in 10 clubs (84%) run open events or similar activities designed to introduce new people of all ages to sailing and increase club membership numbers

Does your sailing club run open events or similar activities designed to introduce new people of all ages to sailing and to increase club membership numbers?



Club Structure and Facilities



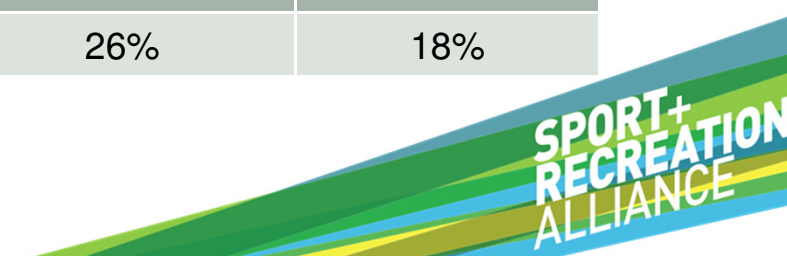
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Club Structure



Sailing clubs are primarily organised as non-profit clubs run by members (86%) or like a business (10%)

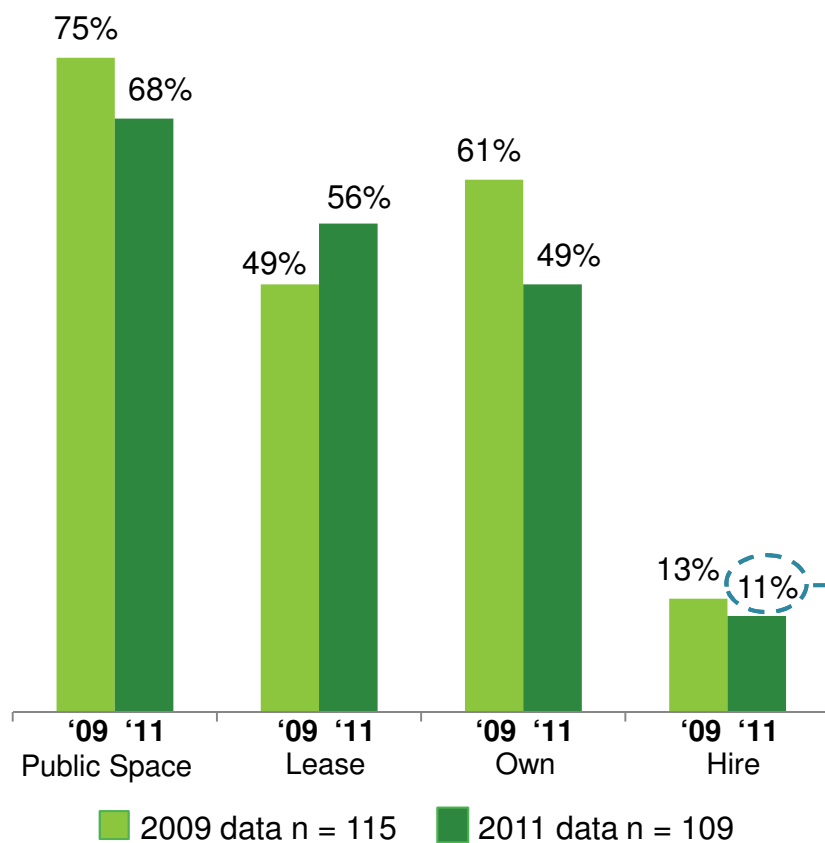
	2011 All Sports (n=1942)		2011 Sailing (n=109)	2009 Sailing (n=115)
<i>Which of the following best describes how your club is organised?</i>				
Club Organisation				
Non-profit – run by members	84%		86% ↓	100%
Non-profit – run like a company	11%		10%	n/a
Profit making business	2%		n/a	0%
Informal	1%		n/a	0%
Other e.g. school / university	2%		4% ↑	0%
<i>Is your club registered as...</i>				
Club Registration				
CASC status	27%		33%	34%
Charity status	7%		12%	7%
Clubmark accreditation	49%		26%	18%



Facility Profile

2 in 3 sailing clubs (**68%**) use public space to participate in the sport. Compared to 2009 we see a decline in facility ownership but in an increase in leasing facilities. **1 in 10** sailing clubs **hire** their facilities, primarily from private organisations

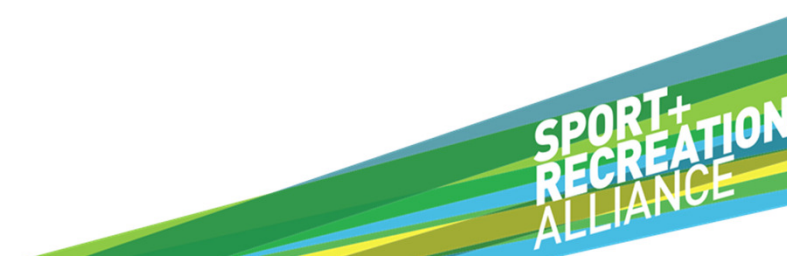
Thinking about facilities, where people play, participate or train, does your club use...



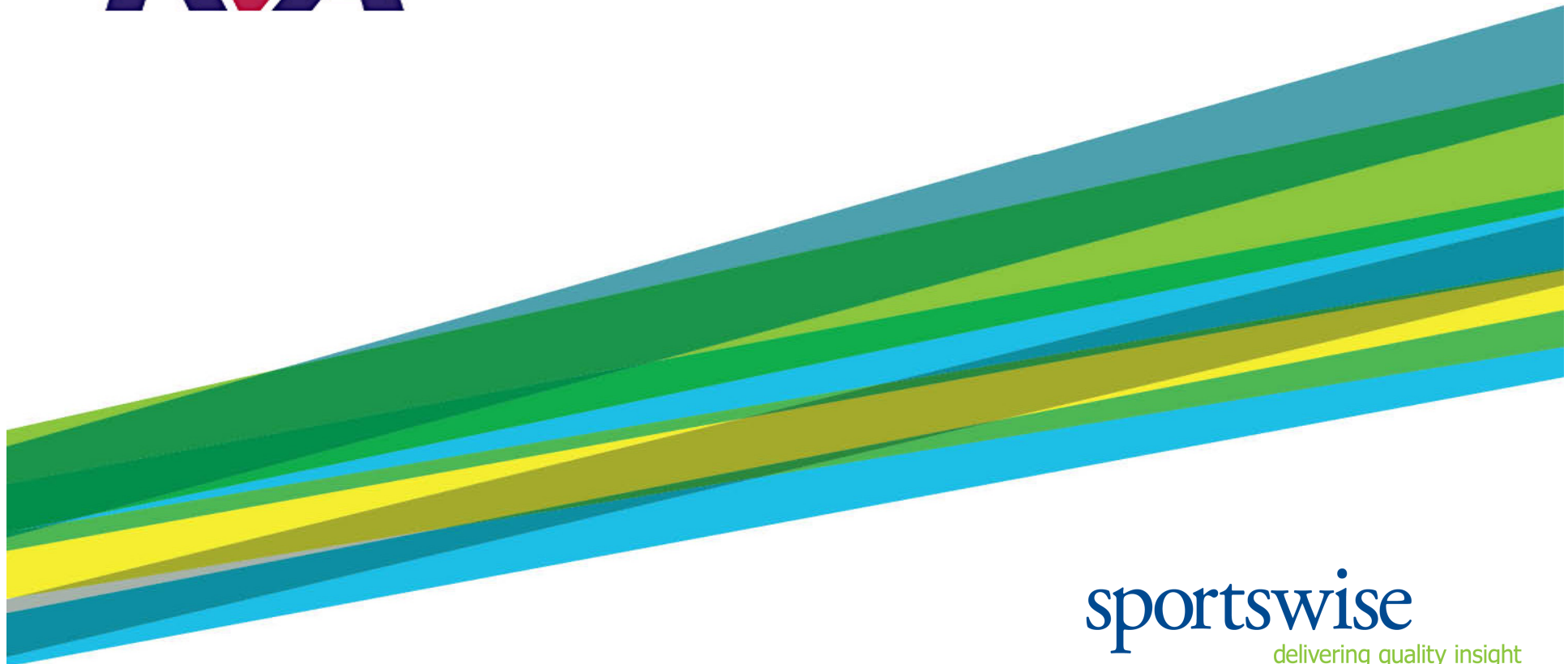
You said your club hires a facility, who owns it?

Ownership of hired facility 2011	%
Private Organisation	33%
Another Club	25%
Local Authority	25%
Trust/Charity	17%
School, College, University	0%

n=12



Club Membership



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Membership Summary

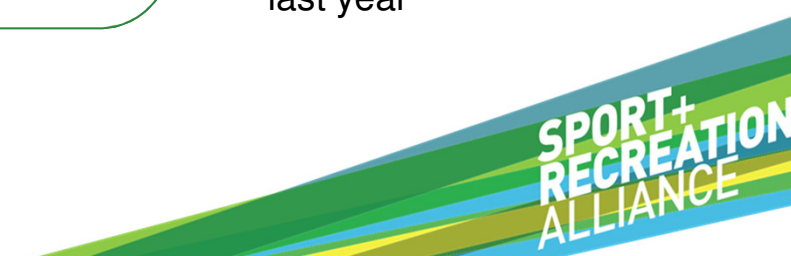
Adult club membership in 2011 stands at **181 playing** and **61 social** members (on average) – a total membership of **242 members per club** (up from 233 in 2010). The average annual 2011 fee is **£88** to participate, compared to **£85** in 2010

2011 Results								
Playing members			Fee	Social members			Fee	
Adults	181	Avg.	£88	Avg.	61	Avg.	£39	Avg.
Juniors	53	Avg.	£30	Avg.	7	Avg.	£13	Avg.

Changes Over Time						
All Members						
	Adults	Playing fee	Social fee	Juniors	Playing fee	Social fee
2011 n = 109	242	£88	£39	60	£30	£13
2010 n = 109	233	£85	£38	60	£30	£11

RYA Junior club membership stands at **53 playing** and **7 social** members (on average) – a total junior membership of **60 per club** (the same as last year)

RYA The average junior annual fee for playing is **£30**, the same as last year

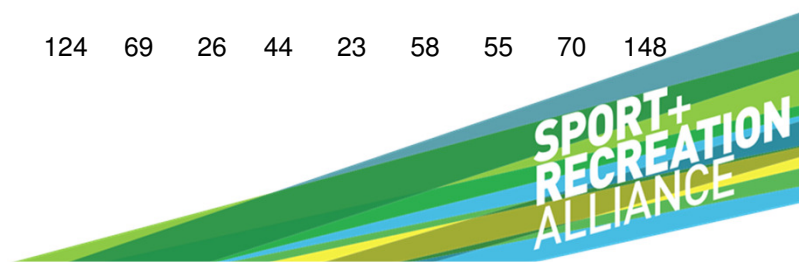
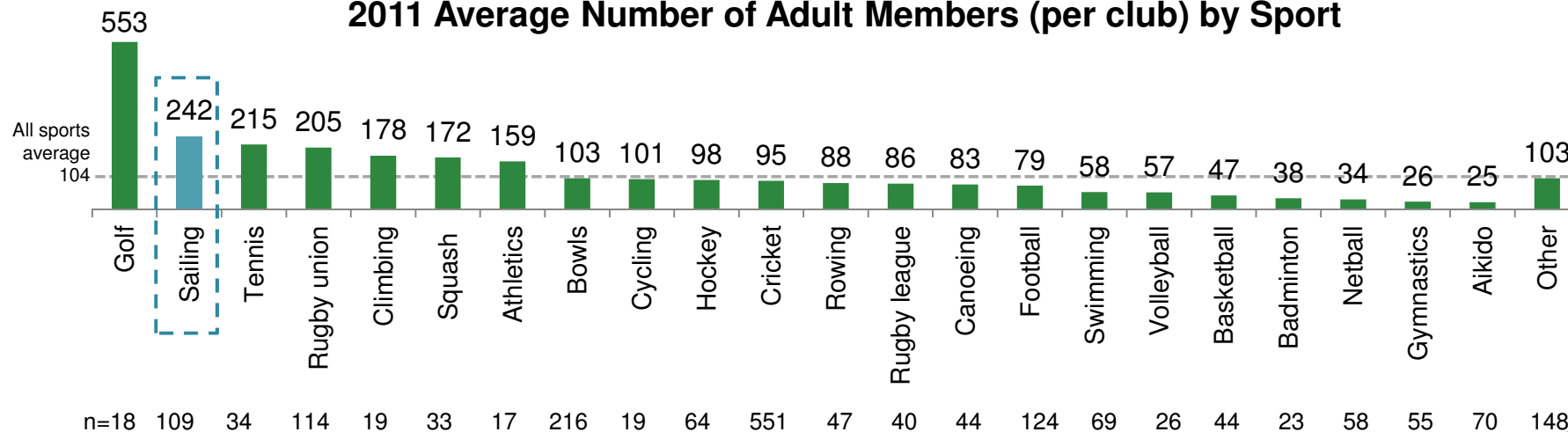


Average Adult Membership

Overall, **28%** of sailing clubs are experiencing growth in their adult membership base versus **23%** which have shown contracting adult membership, this means overall **5%** of sailing clubs are growing their adult membership

	2011 Adult Members	2010 Adult Members	2011 High	2011 Low	% Clubs Growing	% Clubs Contracting
Sailing Clubs	242 Avg.	233 Avg.	2600	15	28%	23%
All sports Clubs	104 Avg.	101 Avg.	2600	1	28%	15%

2011 Average Number of Adult Members (per club) by Sport

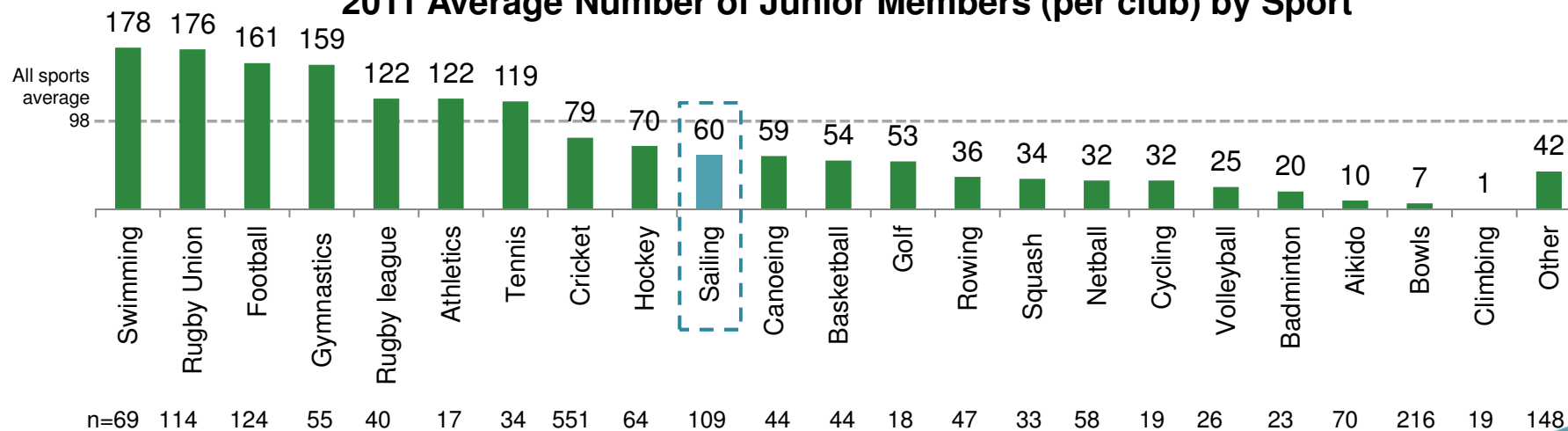


Average Junior Membership

Overall, **17%** of sailing clubs have seen growth in their junior membership base versus **15%** which have shown contracting junior membership, this means overall **2%** of sailing clubs are growing their junior membership

	2011 Junior Members	2010 Junior Members	2011 High	2011 Low	% Clubs Growing	% Clubs Contracting
Sailing Clubs	60 Avg.	60 Avg.	441	1	17%	15%
All sports Clubs	98 Avg.	90 Avg.	2501	1	31%	25%

2011 Average Number of Junior Members (per club) by Sport



Average Club Staffing Levels

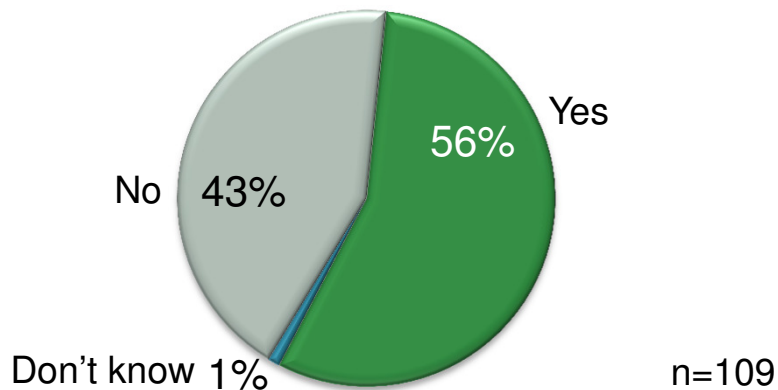


Sailing clubs currently have an average of **66 volunteers** and **2 full-time or part-time** members of staff working within the club

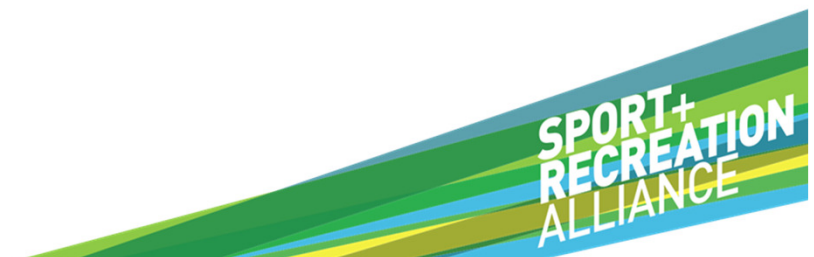
How many volunteers and paid staff (both full time and part-time) work at your club?

	In 2011 (this year)	In 2010 (last year)	Difference (number of staff)
Volunteers	66	66	0
Paid Staff (Full/Part-time)	2	2	0

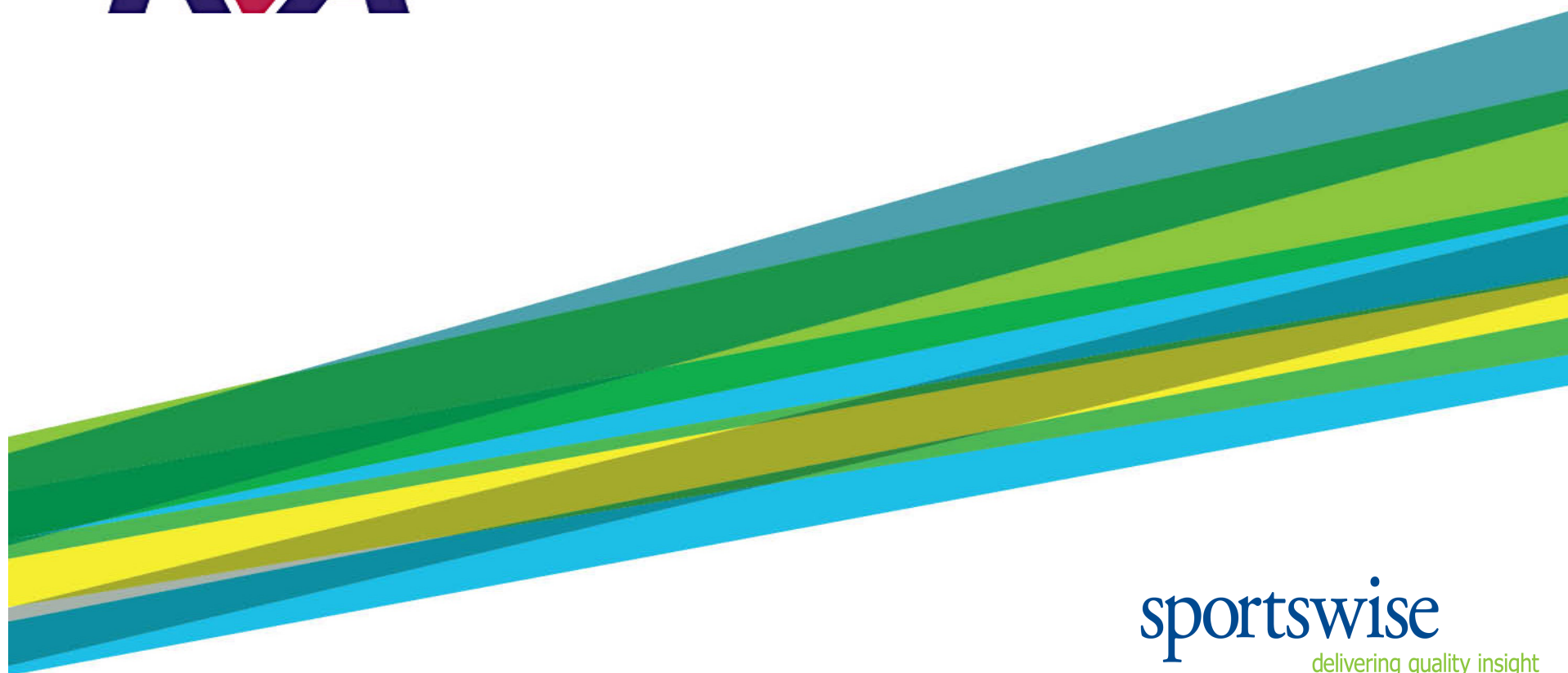
Does your club have a person with a formally designated role co-ordinating the activities of club volunteers?



RYA Over half (56%) of sailing clubs do have a person designated to co-ordinate the activities of club volunteers



Club Finances



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Club Income & Expenditure



Average club income stands at **£52,651** in 2010, down from **£59,791** in 2009. Club expenditure has increased to **£47,785**, from **£45,325** in 2009 (a running cost increase of 5%)

How much income did the club receive and what were the expenses?

Sailing	2010 (£)	2009 (£)
Income (avg.)	£52,651	£59,791
Expenditure (avg.)	£47,785	£45,325
Surplus funds*	£3,775	£13,958

* surplus calculations have been based on all clubs providing both income and expenditure data and therefore vary to average income and expenditure estimates

All Sports Clubs	2010 (£)	2009 (£)
Income (avg.)	£35,736	£35,430
Expenditure (avg.)	£34,585	£33,953
Surplus funds*	£1,091	£1,466

* surplus calculations have been based on all clubs providing both income and expenditure data and therefore vary to average income and expenditure estimates

On average, sailing clubs are running at a **£3,775** annual surplus which represents a **substantial decrease** on surplus figures seen the previous year



Income vs. Expenditure

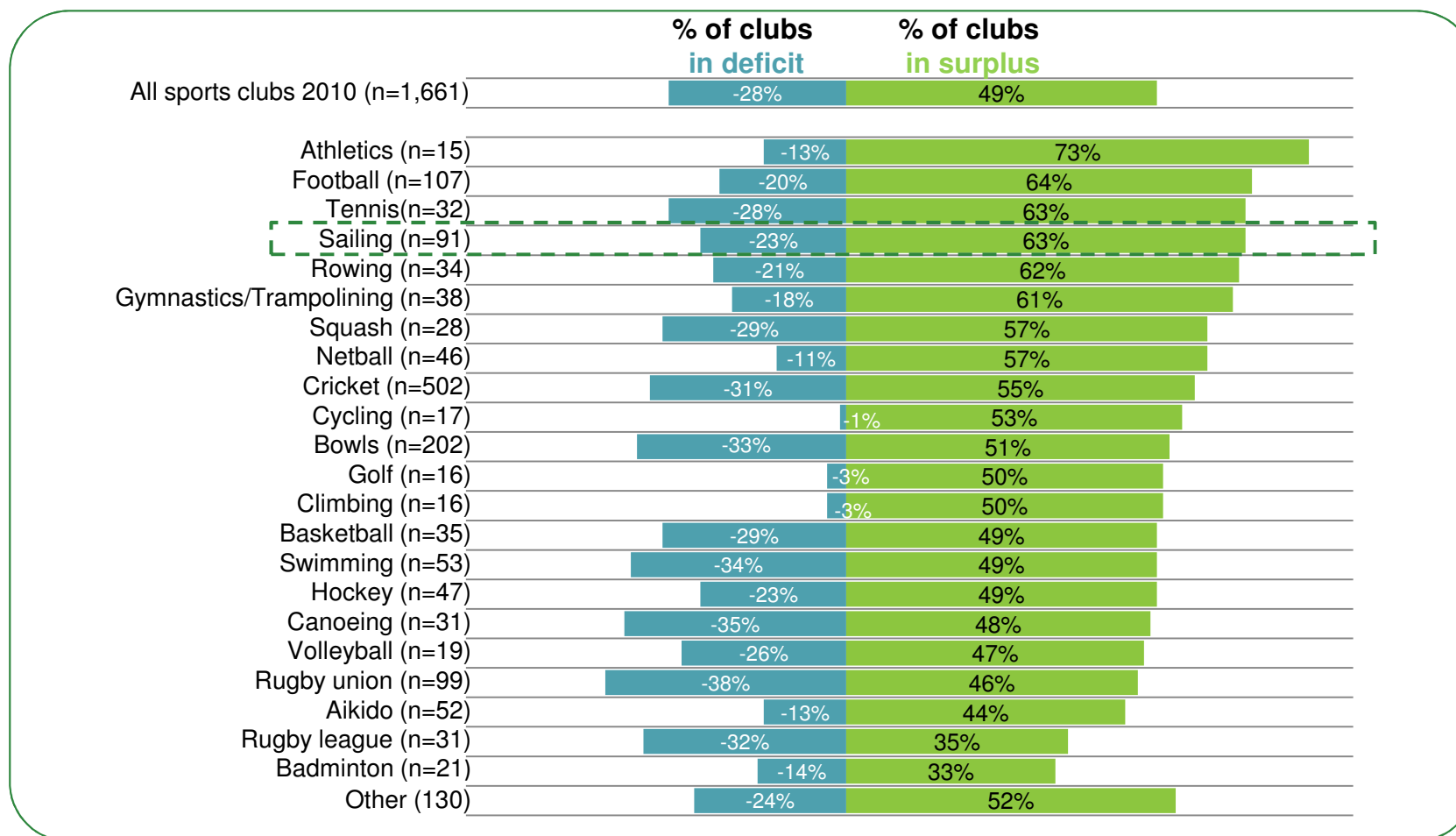
The primary sources of income for sailing clubs are **annual membership fees** and **premises costs**, whilst **sports costs** and **premises** represent the biggest expense

Items etc.	Income	Expenditure
Running the club		
Annual fees for membership	£25,964	£648
Matches, games, tournaments, race fees	£5,437	£1,057
Sports costs; coaching, equipment & kits	£3,226	£14,801
Staff costs; salaries & volunteer expenses	n/a	£5,078
Catering and Facilities		
Bar, catering & hospitality	£9,793	£6,894
Premises costs; rent, hire & maintenance	£11,511	£11,228
Bills & charges; utilities, business rates & licence rates	n/a	£7,376
Fundraising and Grants		
Fundraising & donations (including events)	£2,365	£349
Commercial sponsorship grants; lottery, trusts, local authority	£495	£1
Grants (including lottery, sports fund, local authority, trusts etc)	£3,926	n/a
Other grants coming in or going out; car park fees, website	£2,247	£4,237

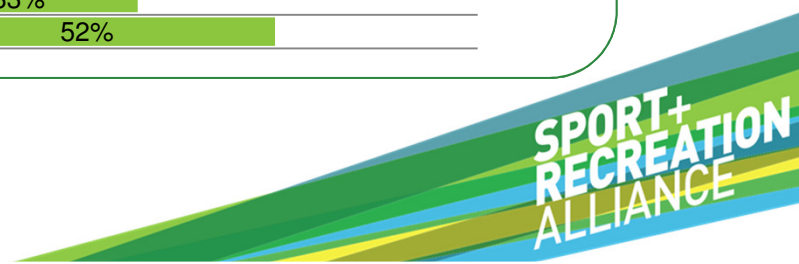
Note: Due to averaging total income and expenditure will not equate to figures shown on previous page

Club Surplus and Deficit

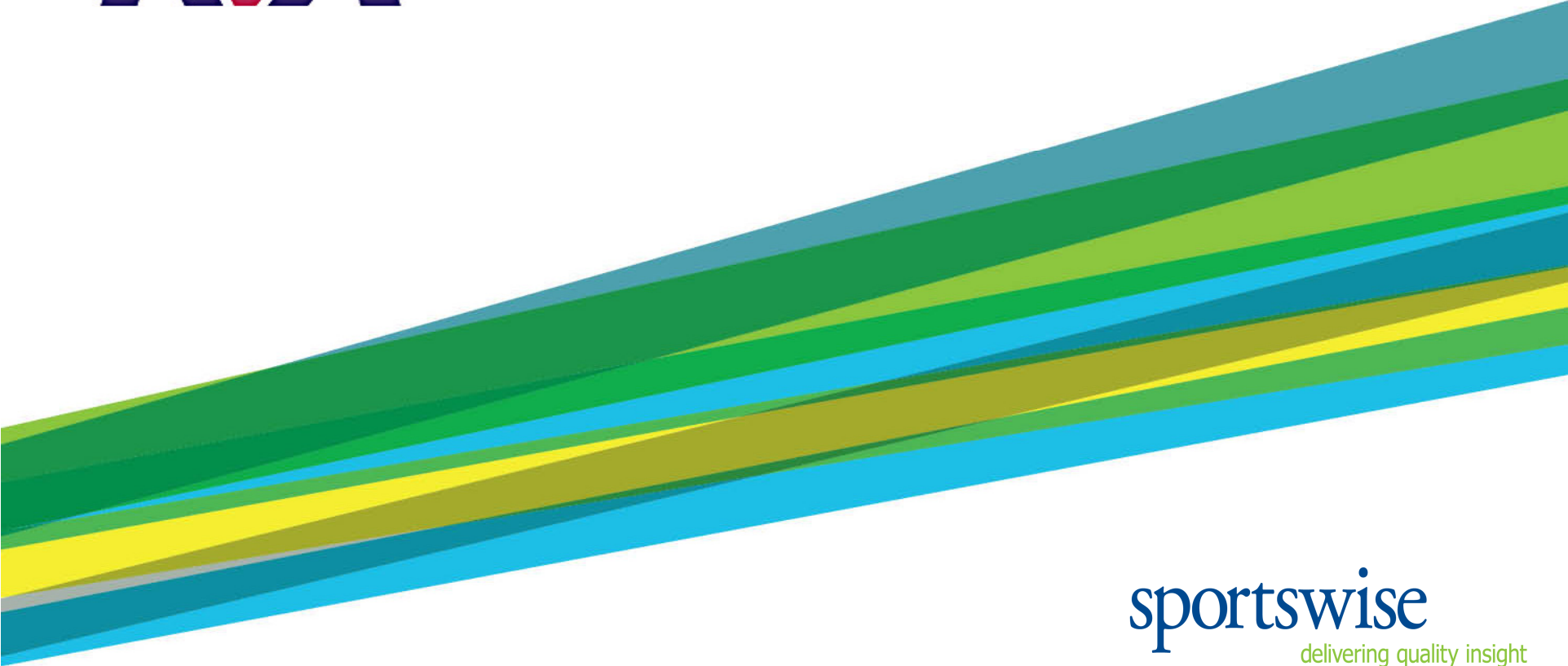
More than 3 in 5 sailing clubs (63%) are operating with a surplus whilst just over 1 in 5 (23%) are experiencing a deficit



Based upon clubs providing income and expenditure data for 2010



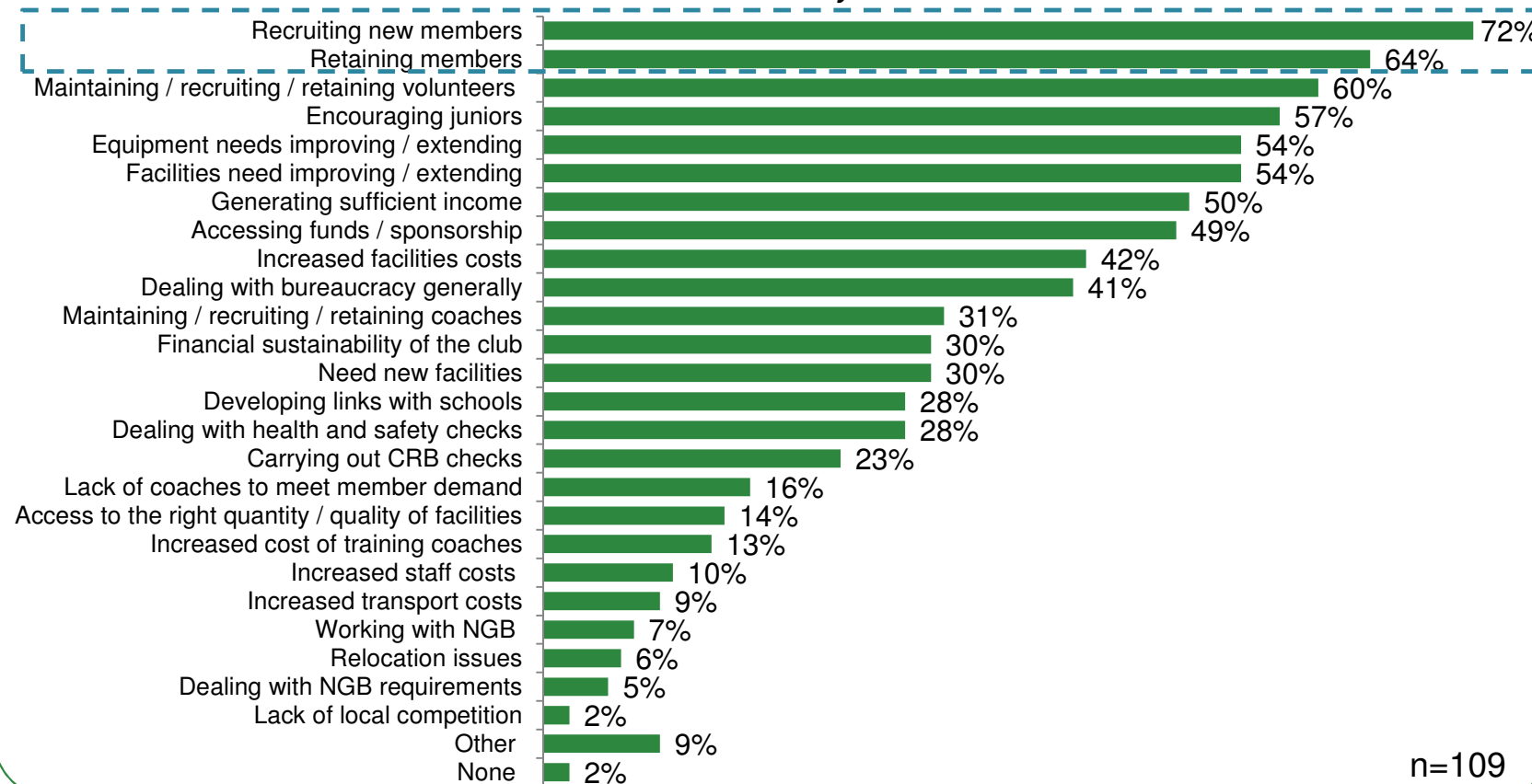
Issues, Challenges and Opportunities



Issues & Challenges

Recruiting new members (72%) and retaining members (64%) are the key challenges facing sailing clubs

*Which **issues/challenges** is your club currently concerned with/likely to face in the next two years?*



Issues and Challenges



What other issues and challenges are there for your club in the next two years?

“Landlord's non-acceptance of lease-payments ”

“Lack of space to run events and large ferries in river restricting sailing”

“Corporation Tax”

“Keeping volunteers motivated and getting more volunteers”

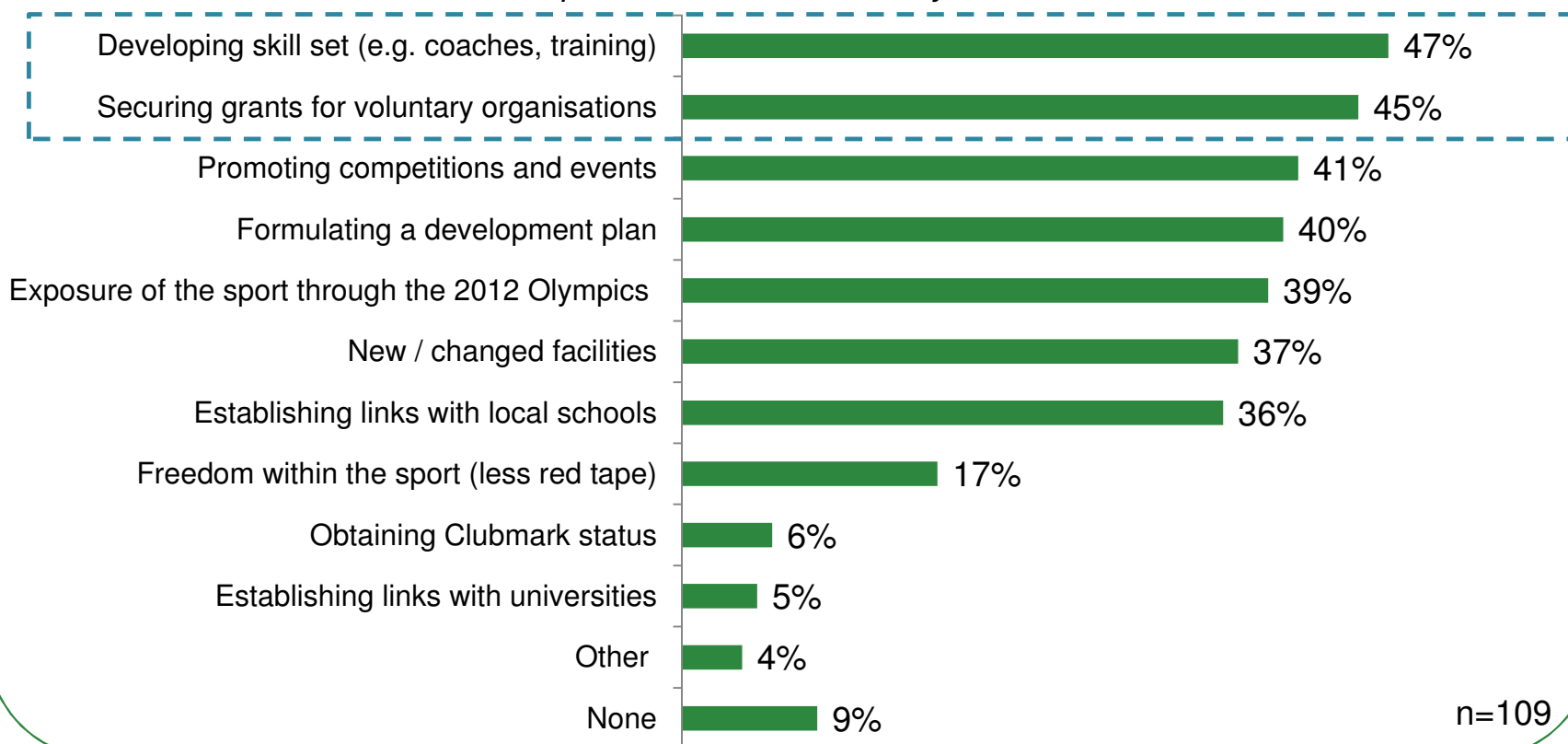
“Membership is very dispersed, our members are losing interest in sailing”

“Extending dinghy park to cope with increased demand from new members”

Opportunities

Developing skill sets (47%) and securing grants for voluntary organisations (45%) are the main opportunities for sailing clubs

*Which **opportunities** from the list below is your club currently presented with or likely to experience in the next two years?*



Future Opportunities



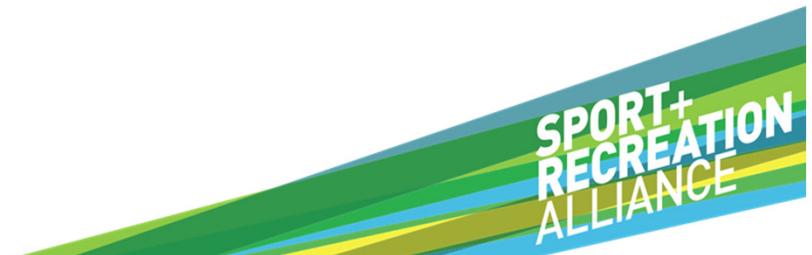
What other opportunities are there for your club in the next two years?

“Disabled sailing ”

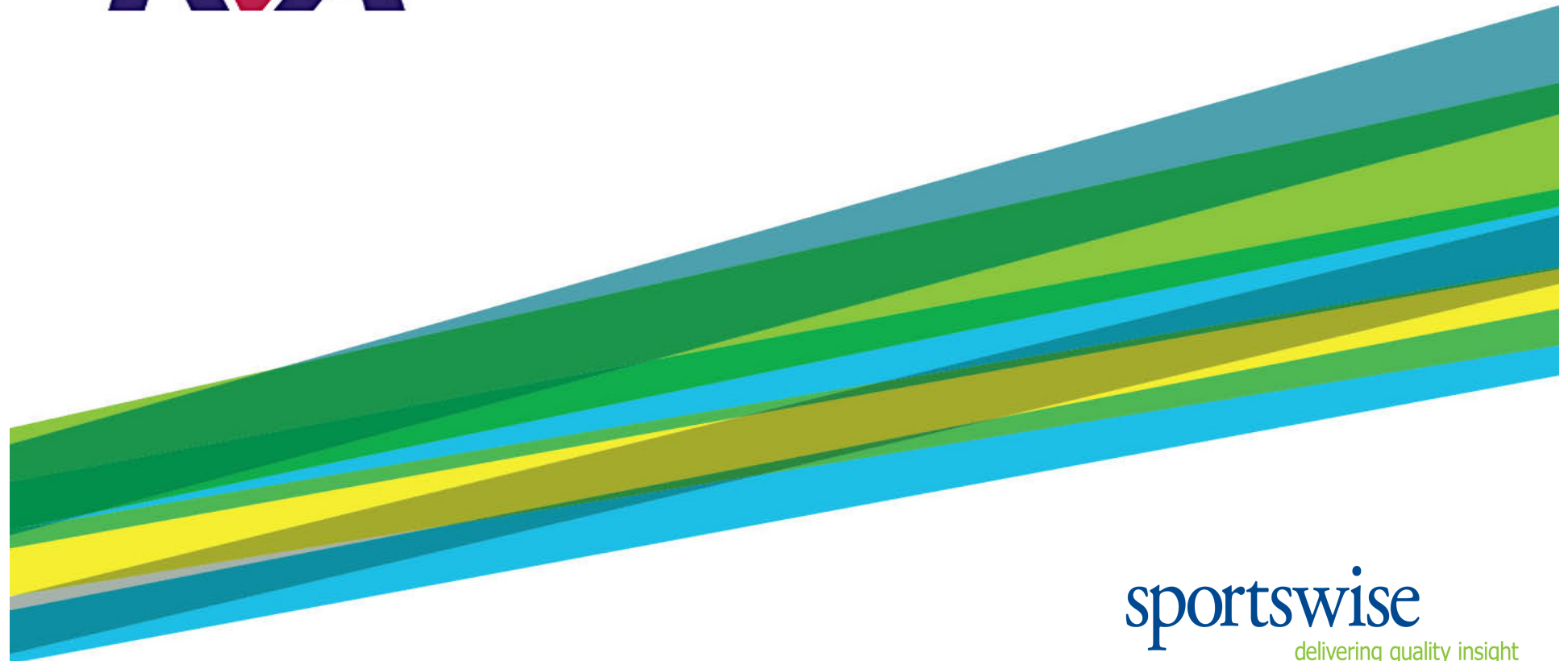
“Obtaining ongoing security through 50 year lease ”

“Maintaining the class of boat ”

“Winding up”



Methodology



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Methodology



RYA The research was conducted using an online survey which was hosted independently by Sportswise and took about 20 minutes to complete

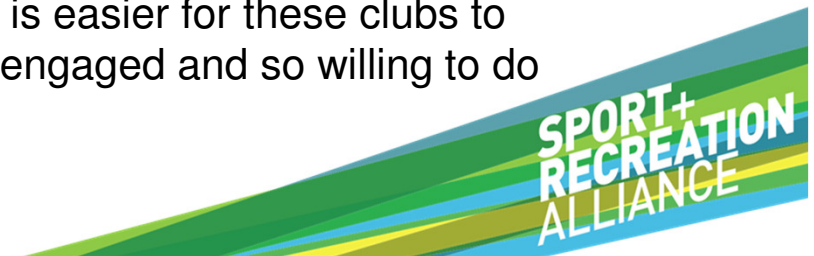
RYA NGB support was enlisted to promote the survey to their clubs, typically this was via e-mails to club secretaries and news articles on their websites. In addition, County Sports Partnerships were also contacted to help promote the survey

RYA Overall the survey received 1,942 complete responses. Fieldwork was conducted from March 8 to May 31 2011

RYA In total, the survey represents more than 40 different sports (2 or more responses). Sailing is one of 16 sports that achieved a club sample in excess of 30. Results with a low base size should be treated with some caution

RYA Data for all sports club has been weighted to reflect the universe of sports clubs in the UK

RYA Our sample is over-represented by CASCs and more formally organised clubs, as with the 2009 survey. Presumably this is because it is easier for these clubs to complete the survey and they are more likely to be engaged and so willing to do so





Thank you!

The Sports Club Survey was conducted by Sportswise on behalf of the Sport & Recreation Alliance

The full report is available for download from www.sportandrecreation.org.uk

For further information please get in touch with the contacts below

A large graphic for the Sport and Recreation Alliance. It consists of several overlapping, diagonal stripes in shades of blue, green, and yellow. The text 'SPORT+ RECREATION ALLIANCE' is written in large, white, bold, sans-serif capital letters across the stripes.

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Sport and Recreation Alliance

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