



MOVING COMMUNITIES IN FOCUS

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LEISURE FACILITY RECOVERY: A STRONG CUSTOMER RESPONSE

The results from the Moving Communities Customer Experience survey are in and paint a positive picture of overall satisfaction and intention to visit leisure centres more in the future, whilst highlighting the role leisure centres play in keeping people active who might not participate otherwise.

Over 50,000 responses from individuals who have visited at least one of 1,183 sites since the re-opening in April 2021, representing 267 operators, and 158 local authorities, suggest that customer expectations have been met. 86% of respondents reported being either fairly or very satisfied with the cleanliness of changing areas and 90% with activity areas. Both figures are significantly up from pre-Covid levels of 70% and 80% respectively.

The findings also provide an insight into how much of leisure centre users' overall physical activity takes place in the centre itself as opposed to in other settings. Interestingly, for those completing moderate intensity

activity i.e., enough to raise their breathing rate, less than four times a week, there appears to be a greater reliance on public sector facilities than those more habitually active. There is a direct correlation between deprivation decile and a preference to exercise in a centre rather than at home or outdoors, whereby the less affluent one's postcode, the more likely they appear to want to use a leisure centre.

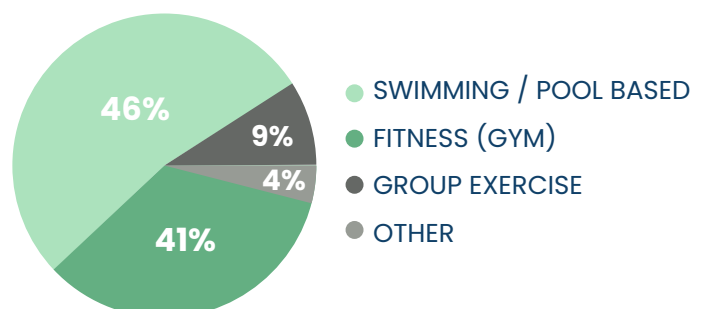
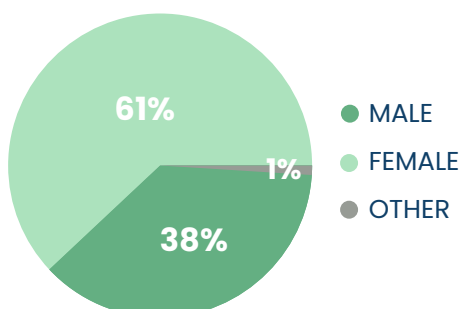
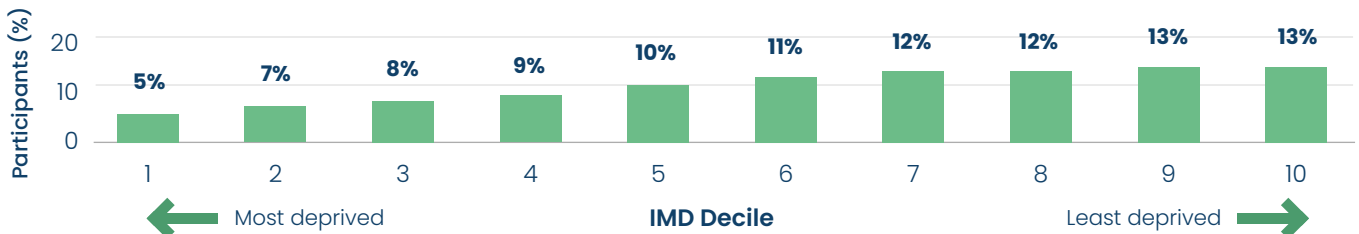
METHODOLOGY

The Moving Communities Customer Experience Survey was carried out over a 7-week period in May/June 2021, using an online survey distributed by participating local authorities and operators via email. The sample was therefore self-selective and the results have not been weighted in any way. The survey was designed in conjunction with Sport England's Insight team and builds on previous similar surveys carried out by the National Benchmarking Service.

PARTICIPANTS

RESPONSES	LEISURE CENTRES	OPERATORS	LOCAL AUTHORITIES
50,068	1183	267	158

DEMOGRAPHIC



THE CUSTOMER EXPERIENCE

Consumer perceptions of cleanliness and their confidence in COVID-19 protocols will be key to the recovery of indoor, centre based, physical activity participation¹. It is particularly encouraging therefore to report that alongside participation analysis, which now sees leisure centres at 71% recovery compared to 2019 participation levels, **90% of customers from our sample (all of whom have visited a facility at least once since 12th April 2021) were satisfied (responded very or fairly satisfied) with their overall experience at the facility.** A key driver of this positive performance will likely be the cleanliness of facilities, with an encouraging 90% reporting satisfaction with the cleanliness of the activity area itself, and 86% satisfied with the cleanliness of the changing areas and toilets. These figures are significantly higher than pre-COVID cleanliness scores as reported by NBS in 2020, when activity area satisfaction was at 80% and changing/toilet area satisfaction was only 70%.

The Confidence Indicator Score is a metric that has been introduced during the pandemic and reflects the customer's confidence in returning to their centre. Findings from this survey suggest that those who have seen the new industry protocols in action are generally pleased with both the processes and the ways in which they are being implemented, with 69% of respondents active promoters (extremely likely to recommend) versus only 9% detractors (not likely to recommend) – giving an overall Confidence Indicator Score of 60%. This compares favourably when results from post-lockdown openings where scores were typically between 50% and 60%.

THE ROLE OF THE LEISURE CENTRE

The growth of digital platforms providing access to home-based workouts² and an increase in people running/cycling have been widely reported³ during the pandemic, especially during lockdown periods. Government messaging focused heavily on the importance of exercise, and activity was a chance to socialise and be outdoors.

Many industry commentators therefore wondered whether the role of both commercial fitness facilities and leisure centres would need to change to reflect this shift in consumer behaviour. As reported via Moving Communities however, participation levels in leisure centres have reached 71% of 2019 levels (still capped by COVID-19 restrictions), and commercial chains are reporting strong sales. It seems therefore that demand for 'traditional' facility-based exercise is still there. This is supported by our research, with **86% of respondents reporting that they preferred exercising in a leisure centre to a more informal environment**

such as at home or in a park. Only 10% responded that they didn't miss their centre when it was shut, whilst 77% felt that the staff at the centre gave them the guidance they needed to be more active.

The role that centre staff play in keeping people active may be reflected in the way in which respondents keep active when outside of facilities, or don't as the case may be. People who were exercising at a moderate intensity between one and four days a week were more likely to be doing it within the leisure centre environment than outside, however those people exercising seven days a week were over three times more likely to be exercising outside of the leisure centre than inside.

This early data also suggests an intention of respondents to keep centre-based activity at the heart of their activity habits. Respondents felt strongly that their centre was important to them, with 97% stating that they intended to exercise at least once a week at the facility over the next six months and 82% stated that they intended to exercise more at the centre than in an informal setting (e.g., at home or outdoors). **Only 9% stated that they felt their local centre did not play a significant role in the lifestyle they wanted to live.**

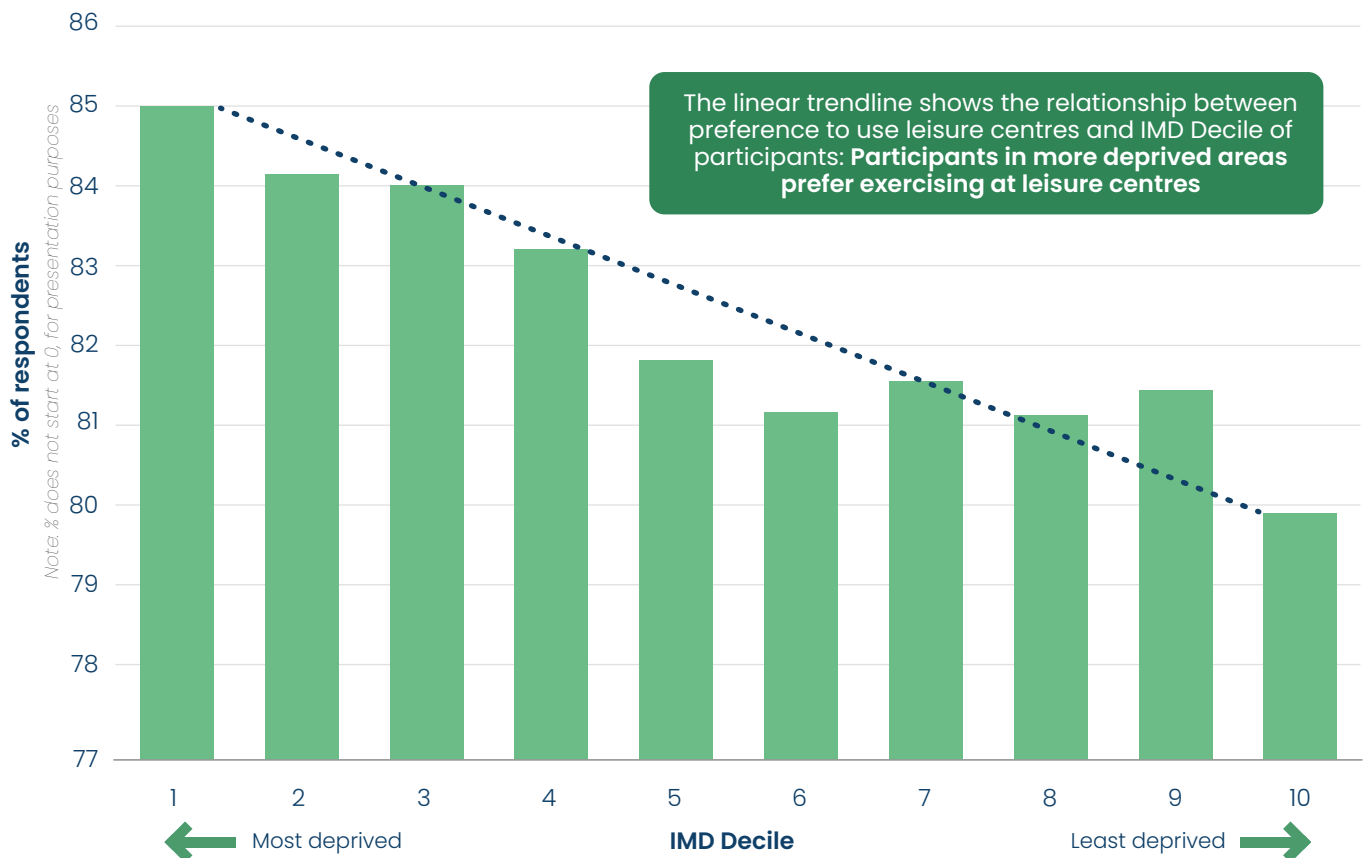
DEPRIVATION LINK

Our previous Moving Communities In Focus article⁴ investigated the strong return of participants from more deprived areas to facilities and the more balanced distribution of participation across deprivation groups.

To understand this in more detail we have analysed the responses to the customer experience survey by Index of Multiple Deprivation (IMD) decile. Analysis has revealed a direct correlation between people's preference for exercising in a leisure centre as opposed to exercising in a more informal setting (e.g., at home/in a park etc.), and the IMD decile that corresponds with their postcode. The data shows that the more deprived the area, the more likely people are to prefer exercising in a leisure centre. This aligns directly with weekly recovery statistics, showing that a higher proportion of those returning to centres are from more deprived areas, compared with the same period in 2019. This is perhaps unsurprising given quality of space likely to be available to people from more deprived areas to exercise in – whether indoors at home, or outdoors in public spaces – but it does serve to re-enforce the role these facilities play in communities.

THE LINK BETWEEN DEPRIVATION AND PREFERENCE FOR LEISURE CENTRE USAGE

Respondents who strongly agree that they prefer exercising at the leisure centre over exercising in a more informal setting e.g. at home or in a park, by IMD Decile



USING THESE RESULTS TO DRIVE CHANGE

Moving Communities data has stated to present a consistent narrative - not only of (albeit capped) recover, but of opportunity. An opportunity for leisure centres to become a safe and supportive space to be active for the most deprived communities.

There is clearly a desire for facility-based exercise in

lower socio-economic areas, where people have lower activity levels than in more affluent areas, and where the space or place is less conducive to physical activity, exercise, or sport. There is a chance here for leisure centres and facilities to become a 'haven' where access is affordable and non-committal, barriers can be overcome, and activity is safe, supported, and fun.

ABOUT MOVING COMMUNITIES

Moving Communities tracks participation at public leisure facilities and provides new evidence of the sector's performance, sustainability and social value. Driven by live data from across England, Moving Communities is a programme that enables local authorities, leisure providers and policy makers to support the recovery of public gyms and leisure centres. For information, visit www.movingcommunities.org or see the regular infographics published by Sport England and Moving Communities.

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MOVING COMMUNITIES PARTNERS:

