



MOVING COMMUNITIES IN FOCUS

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MAPPING THE RETURN TO LEISURE CENTRES: A GEOGRAPHICAL ANALYSIS

Moving Communities data from across England shows how the recovery of leisure centres since reopening differs significantly between different geographies. When comparing the volume of visits to leisure centres since reopening with the same period in 2019, the lowest performing region (Yorkshire and the Humber) has seen almost 25 percentage points less visits compared to the highest performing region (North East).

Furthermore, when analysing recovery rates by the Office of National Statistics (ONS) Area Classifications¹, Major Urban areas have recovered better than rural areas. Travel time data also shows that overall, participants are travelling less distance to use leisure centres, than they were prior to the pandemic.

REGIONAL DIFFERENCES

Using Moving Communities data² from weeks 5 – 10 since reopening (taking into consideration all weeks when group exercise has been allowed to operate), the total number of visits from 719 sites across the 8 regions of England has been compared to the same period in 2019, to understand how recovery has differed across the country.

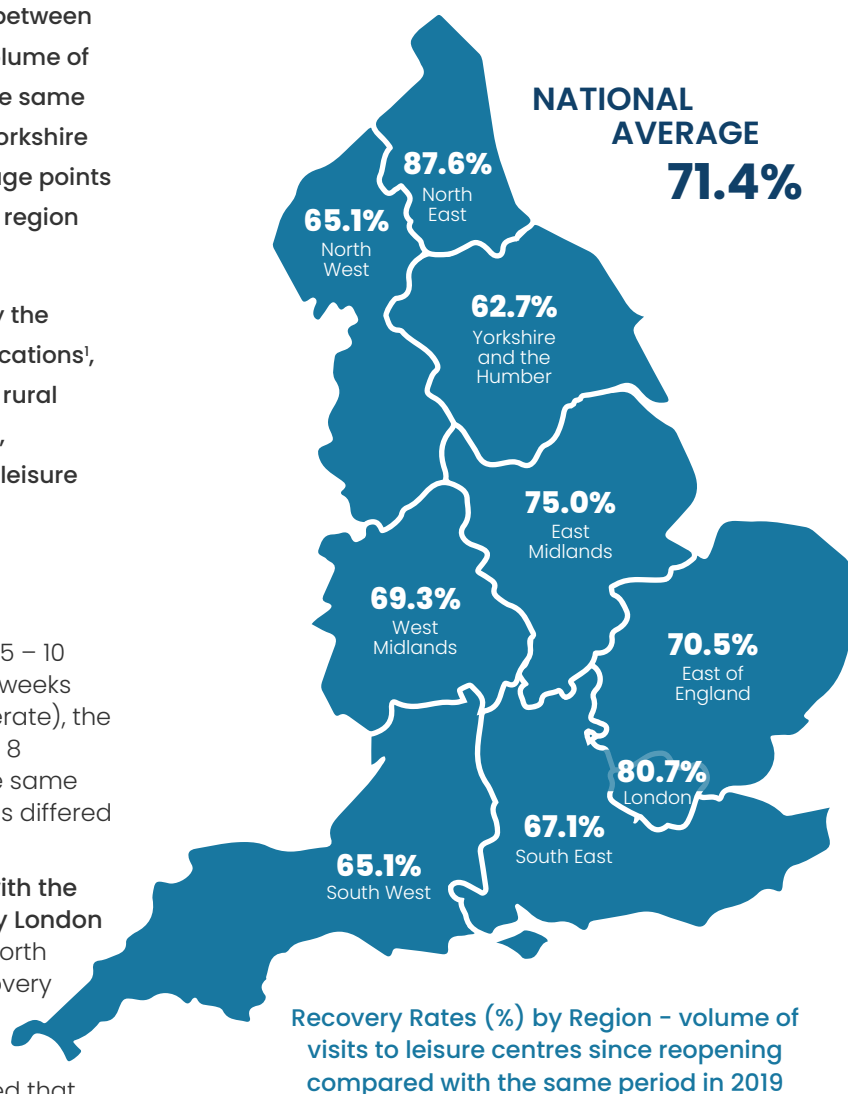
As demonstrated by the graphic, **the region with the highest recovery is the North East, followed by London and the East Midlands.** At the lower end, the North West, South West and South East all have recovery rates lower than the national average (71.4% of visits compared to 2019)

Moving Communities insight has demonstrated that nationally, **a greater proportion of returning visits are undertaken by the 16–44 age group.** This trend is exemplified in the 'high-performing' regions, with the North East, London and the East Midlands all having high recovery rates in the 16–44 age group.

In contrast, the proportion of total visits to leisure centres by young adults has actually reduced in Yorkshire and the Humber.

Apart from age, regional differences are also likely to be influenced by factors such as local COVID-19 case rates, local leisure centre

operations and wider contextual factors. Further insight is required to understand this in greater detail.



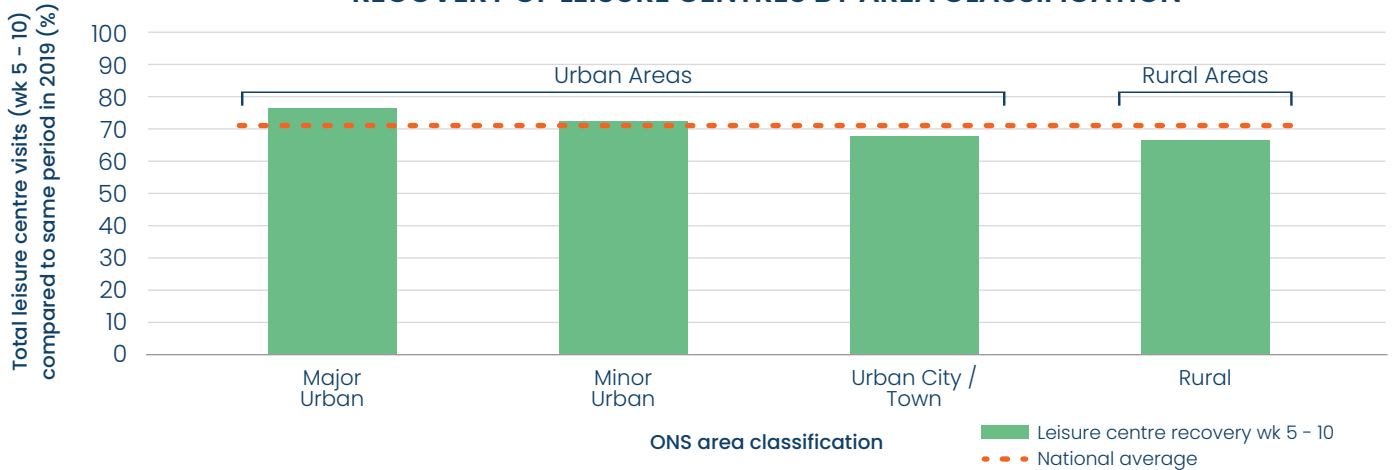
URBAN VS RURAL

Using ONS area classifications, each of the 719 leisure centres have been assigned to one of four groups. The recovery of leisure centres in each of these groups has then been compared and shown in the graph below, measured as total visits during week 5–10 in 2021, compared with the same period in 2019. The first three groups are typically classed as 'Urban', while the final group is a combination of three groups that are classed as 'Rural'.

The graphic shows that overall, facilities in urban areas have recovered more strongly than those in Rural areas, with the highest return in the Major Urban classification. Leisure centres in this classification are likely to be located in cities including Greater London or central Birmingham, Liverpool, Manchester and Newcastle, whereas Minor Urban includes smaller cities such as Nottingham and Sheffield.

As described in the regional analysis, the strong performance in urban areas appears to be influenced by younger urban populations, coupled with higher leisure centre recovery in these age groups. For example, the recovery rate (number of visits in week 5-10 of 2021 compared to the same period in 2019) for 16-24 year olds in Major Urban areas is stronger than any other age group across any area classification. In 2019, 16-44 year olds accounted for 46% of overall visits, whereas they accounted for 53% in 2021 (week 5 - 10).

RECOVERY OF LEISURE CENTRES BY AREA CLASSIFICATION



CHANGES TO TRAVEL TRENDS

By utilising data from over 1.4m individual visits³ to leisure centres, powered by the DataHub, we are also able to analyse changing consumer trends for leisure centre users. The data shows us that in 2019, the

average travel time for participants (from home address to the leisure centre) was almost 17 minutes*. From week's 5-10 in 2021, this has reduced to 15 minutes, with a greater proportion of users travelling less than 5 minutes to visit their leisure centre.

TRAVEL TIME (MINS)	2019 (SPECIFIC DATES)	2021 (SPECIFIC DATES)
TOTAL	16.74	15.01

ACTING ON THE DATA

As a sector we must strive to develop a greater understanding as to why some areas of the country have recovered better than others.

The impact of high return rates by younger age groups is clear, and we should seek to increase the confidence of older adults by identifying, delivering and marketing activities and services that are safe,

appealing and effective.

The travel time analysis illustrates that the pandemic has led to more 'localised' demand, which could be influenced by participants using more active travel than before the pandemic. Further insight is required to understand what impact this may have on long-term demand for leisure.

DEFINITIONS

* Travel time is calculated by analysing the average time taken to drive from the users home postcode to the leisure centre, at peak time.

REFERENCES AND DATA SOURCES

- 1 www.ons.gov.uk/methodology/geography/geographicalproducts/ruralurbanclassifications/2011ruralurbanclassification
- 2 Sport England (2021): Moving Communities Platform – Weeks 5 to 10 (10/05/21 – 20/06/21)
- 3 DataHub (2021): Circa 1.5m visits to leisure facilities: A representative sample of data from 2019 and 2021.

MOVING COMMUNITIES PARTNERS:

