



MOVING COMMUNITIES IN FOCUS

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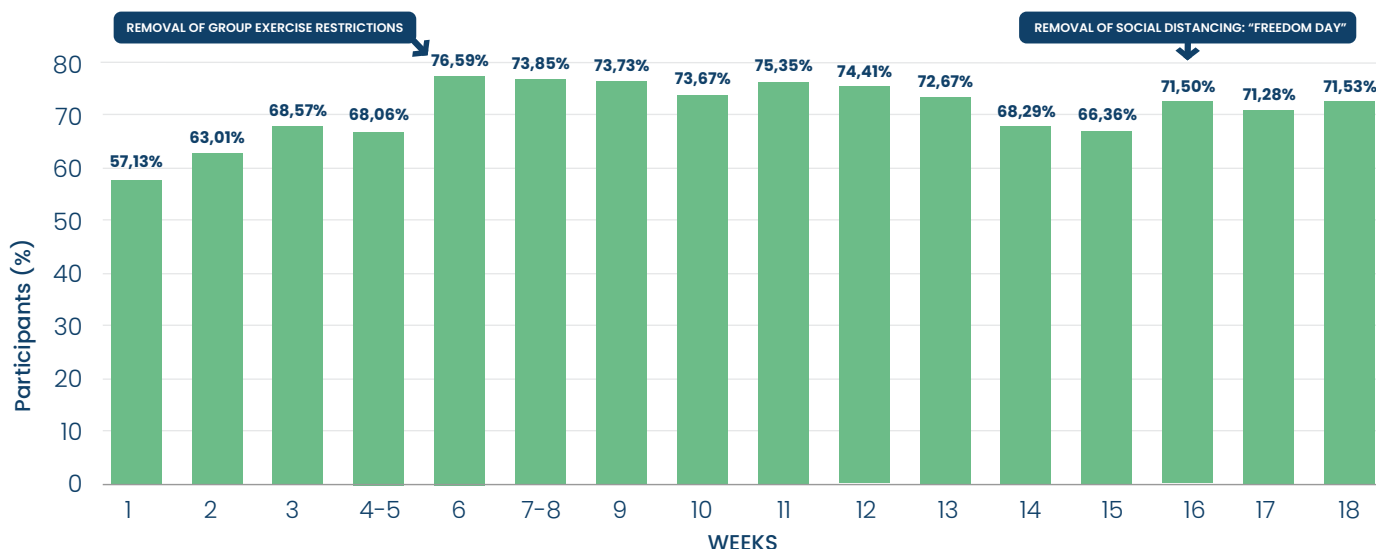
SLOW AND STEADY: PARTICIPANTS RETURN TO LEISURE CENTRES BUT FURTHER GROWTH IS NEEDED

Moving Communities data shows that while the public leisure sector has shown a steady rate of recovery since reopening in March, there are former participants still choosing not to return to facilities, with recovery rates settling at around 72%. While mandatory capacity restrictions have been removed, there appear to be factors holding back the final tranche of customers and limiting overall recovery.

THE STORY SO FAR

Moving Communities data shows participation rates at 875 sites across England increased quickly during the first six weeks since reopening – up to a high of 77% – but has varied since then. Key milestones such as the lifting of group exercise restrictions and the removal of all restrictions on ‘Freedom Day’ both led to immediate increases in comparison with the previous weeks.

PARTICIPATION RECOVERY GRAPH 2021 VS 2019



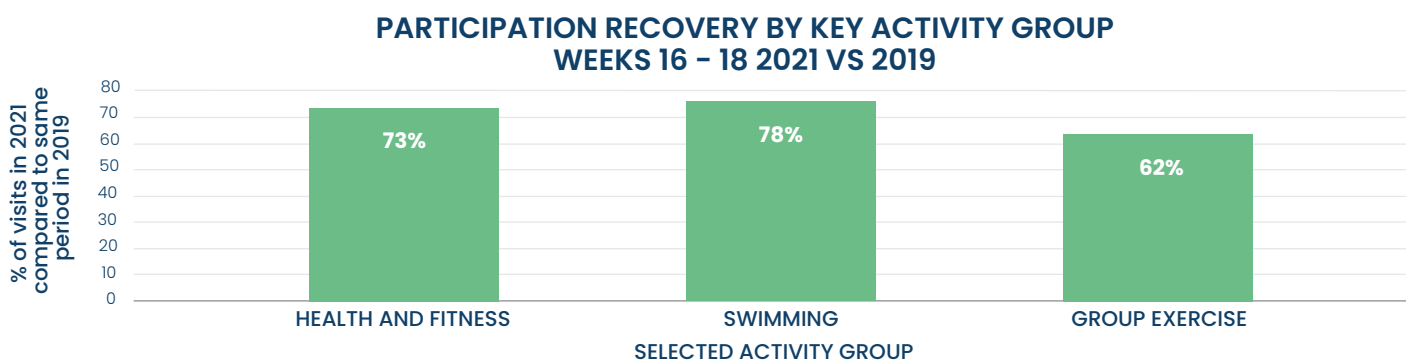
It should be noted that as the data is a 2021 vs 2019 comparison (week by week), the data will allow for seasonality. For instance, a week in mid-August 2021 will be compared to mid-August 2019, allowing for lower visit numbers during summer holidays. Weeks 4-5 and 7-8 have been grouped to allow for the May Bank Holidays which changed weeks between 2019 and 2021.

THE LIMITING FACTORS

With recent recovery rates holding steady above or around 70% it is key that we evaluate the potential reasons for the lack of continued growth. One factor is likely to be the ongoing presence of COVID-19 across England and the effect that this has on consumer confidence in centres as the safest places for them to exercise and therefore willingness to return to leisure facilities. Wave 19¹ data (23rd to 26th July 2021) from Savanta ComRes identified that 61% of respondents stated that they were worried about exercising close to other people, which is 4 percentage points higher than the previous set of results. Additionally, 83% of respondents who participated in indoor gym/fitness in the previous week agreed that COVID-19 safety measures should continue at facilities, demonstrating their importance to consumers and their continued role in supporting further recovery.

ACTIVITIES ARE RETURNING AT DIFFERENT RATES

Across activities, the recovery rates for health and fitness, swimming and group exercise has differed in recent weeks.

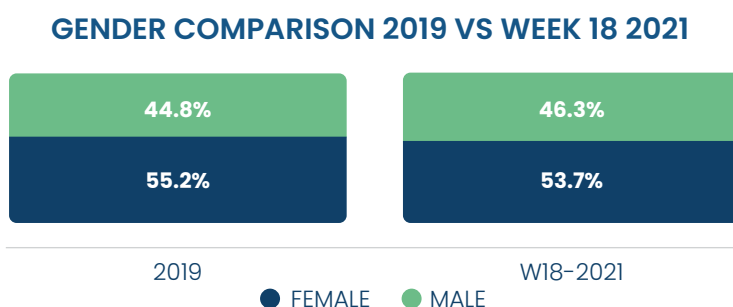


When participation in these activities is compared to the same period in 2019, swimming and health and fitness continue to have steady recovery rates while group exercise has much lower levels of participation. This could be driven by several factors, such as the operational costs associated with running group exercise for operators (and therefore fewer classes being provided), reduced willingness of customers to exercise together and in confined spaces such as studios, or continued capacity restrictions.

PROGRESS CAN BE MADE TO ENCOURAGE THE RETURN OF LESS REGULAR PARTICIPANTS

Previous Moving Communities insight has demonstrated that nationally, **a greater proportion of returning visits are undertaken by the 16-44 age group**. The most recent data shows that while participation rates from older adults (65+) are improving, younger visitors are returning at a faster rate – the 44+ age group generating 35% of total visits since the reopening in 2021, compared to 40% for the same period in 2019. It is clear that further work is needed to attract older participants back to facilities, with focussed COVID-19 safety measure potentially being part of the solution.

Women and girls' participation has demonstrated that disparities between some groups can be reduced through the recovery of leisure services. Rates of female participation were significantly lower than for males in the first 6 weeks after reopening. But recent data shows this disparity has been addressed over the 18-week period because the gap between male and female participation has returned to near pre-pandemic margins. The graphic below shows that in 2019, women and girls accounted for just over 55% of participation, compared to almost 54% in week 18 2021.



ACTING ON THE DATA

Insight from the first 18 weeks of leisure centre operation since reopening shows that while there has been significant recovery for leisure centres and operators across England, a gap remains to return participation figures to pre-pandemic levels.

The sector is working hard to drive further recovery and this article highlights potential areas for re-engagement and growth, specifically quoting the lower numbers of participants in group exercise and older adults. This could be implemented in several ways including:

- Providing timetables that meet a range of customer needs and targeted at a range of demographics
- Retaining a level of Covid-19 measures and/or communicating how you are addressing members concerns
- Establishing processes that can increase consumer confidence in Covid-19 measures
- Creating, marketing, and communicating an offer that will draw back those who may be struggling to return to pre-pandemic activity levels or have established new habits

REFERENCES

¹ Savanta ComRes (Wave 19 Sport England physical activity attitudes and behaviours research: 2021)

MOVING COMMUNITIES PARTNERS:

