Moving Communities

Understanding public leisure's contribution to active communities

Customer Experience Survey 3 – October 2023

Background and Methodology

The Moving Communities Customer Experience Survey was carried out over a 19-week period from June to October 2023, using an online survey distributed by participating local authorities and operators via email. Email invites were sent to any member or customer on their database who had attended their leisure centre in the last 3 months. The sample was therefore self-selective and the results have not been weighted in any way. It should be noted that the sample is over representative of females and older age groups.

The survey was designed in conjunction with Sport England's Insight team and builds on the previous two annual MC Customer Experience Surveys, as well as similar surveys carried out by the National Benchmarking Service in the 1990s. It provides an annual snapshot of the "experience" of people using public sector facilities throughout England.

Survey in numbers

Key Messages

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Sample profile

Since 2021, the gender split of respondents has remained consistent, with females being over-represented at 64%. Moving Communities analysis of usage of leisure centres over the last 12 months suggest that 54% of users are typically female. The age profile of the October 2023 survey is are very similar to the October 2021 and 2022 survey, so it is still over representative of older age groups, when compared to the actual user profile of leisure centres that Moving Communities reports.

The "activity mix" of respondents has changed gradually over the last 3 years, with swimming decreasing and fitness and group exercise increasing, but swimming still represents the most quoted main activity at 39%. All other activities had less than a 3% response rate.

Satisfaction levels and NPS

Overall satisfaction levels remain constant and still relatively high, with 43% stating they are very satisfied and a further 38% quite satisfied. Generally speaking, the older age groups are significantly more satisfied than the younger ones with the exception of the 16-24 year age group.

The overall NPS has remained the same as last year at 22 but is down significantly from 2021 when it was at 35. The female NPS is above the national average of 22, standing at 25, while males are below the national average at 19.

Key Messages

What's important to customers and is it being delivered?

Staff being helpful/friendly and cleanliness were the two most important factors to the sample when thinking about visiting a leisure centre, and have been over the last 3 years. However, value for money has increased from 82% in 2022 to 98% this year. Staff being helpful and friendly was also the most satisfactory element relating to the leisure centre experience, with 87% of the sample agreeing that they were Very or Quite satisfied. The largest “gap” between Importance and Satisfaction is cleanliness, where there is a 33% gap between how important it is to customers and how well it is being delivered.

Impact of cost of living crisis

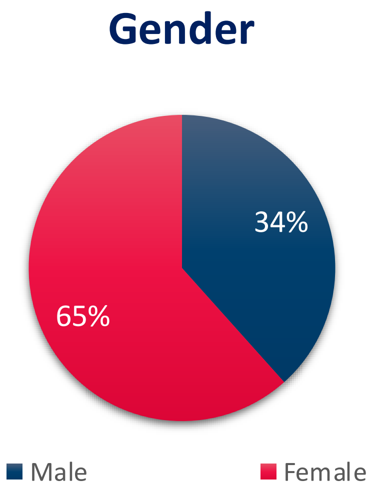
40% of respondents said the cost-of-living increase had had significant or some negative impact on their ability to be active and 31% said it had had significant or some negative impact on their use of sports, leisure and health/fitness facilities.

Physical activity intentions

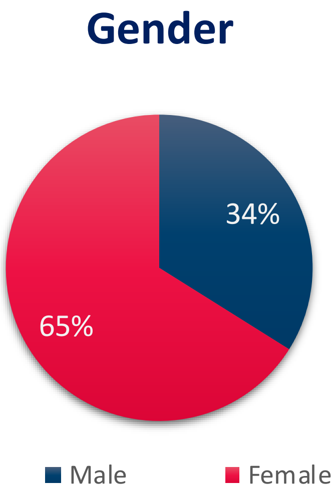
96% of the sample said they use the leisure centre to manage their physical health and wellbeing and 86% prefer exercising in the leisure centre than in a more informal setting. Future intentions around activity have not changed significantly over the last 2 years with still 96% stating that they intend to exercise at least once a week in the centre over the next 6 months. 16-24 year olds were the age group that have the strongest intentions to exercise more often at the leisure centre than in more informal settings.

Gender spilt

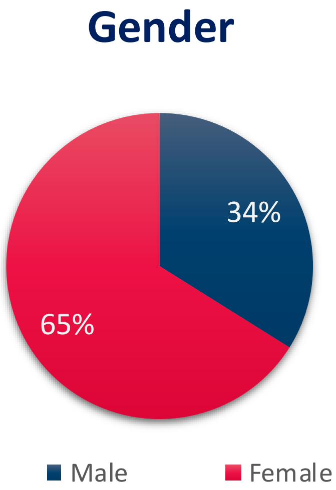
October 2021



October 2022



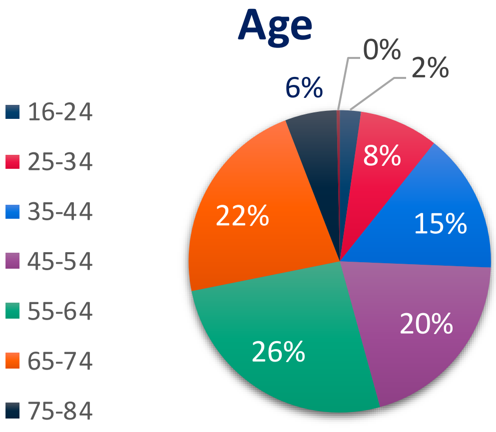
October 2023



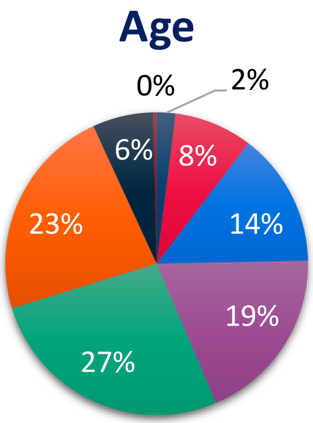
Since 2021, the gender split of respondents has remained consistent, with females being over represented at 65%. Moving Communities analysis of usage of leisure centres over the last 12 months suggest that 54% of users are typically female.

Age profile

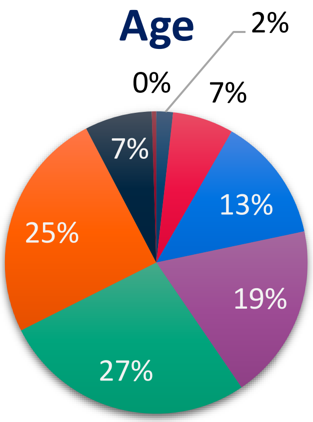
October 2021



October 2022



October 2023



The age profile of the October 2023 survey is are very similar to the October 2021 and 2022 survey, i.e. it is still over representative of older age groups when compared to the actual user profile of leisure centres that Moving Communities reports

How did they get to their centre?
2023 vs 2022/2021

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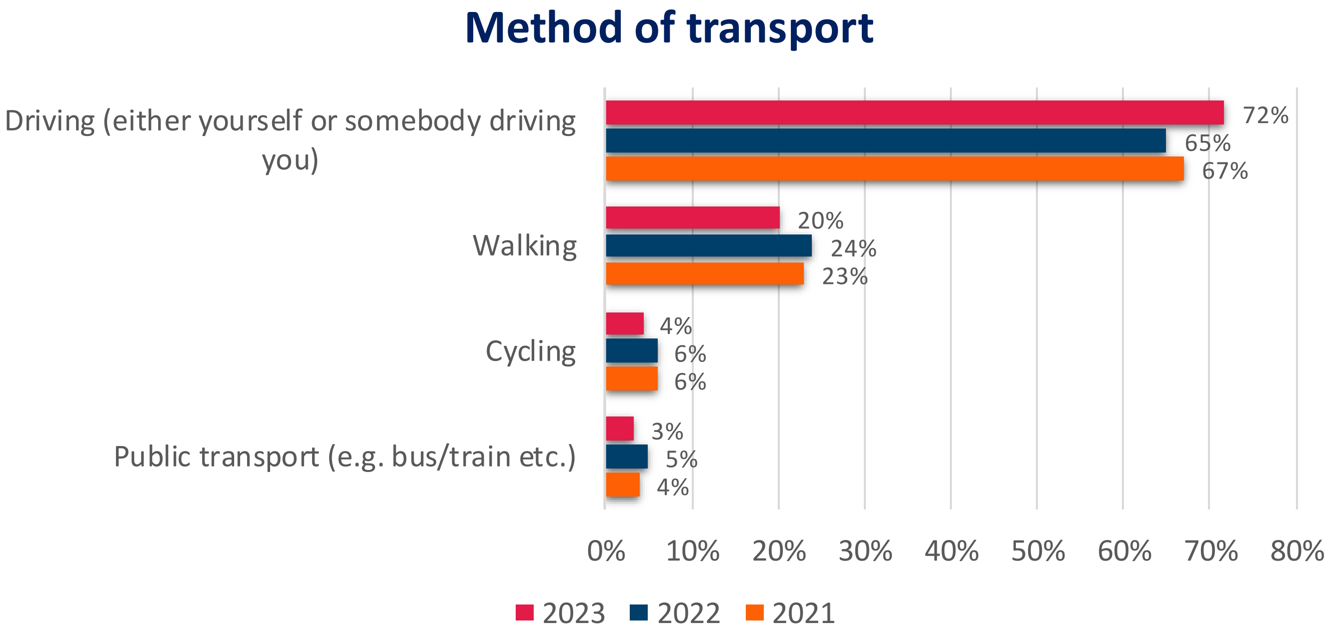
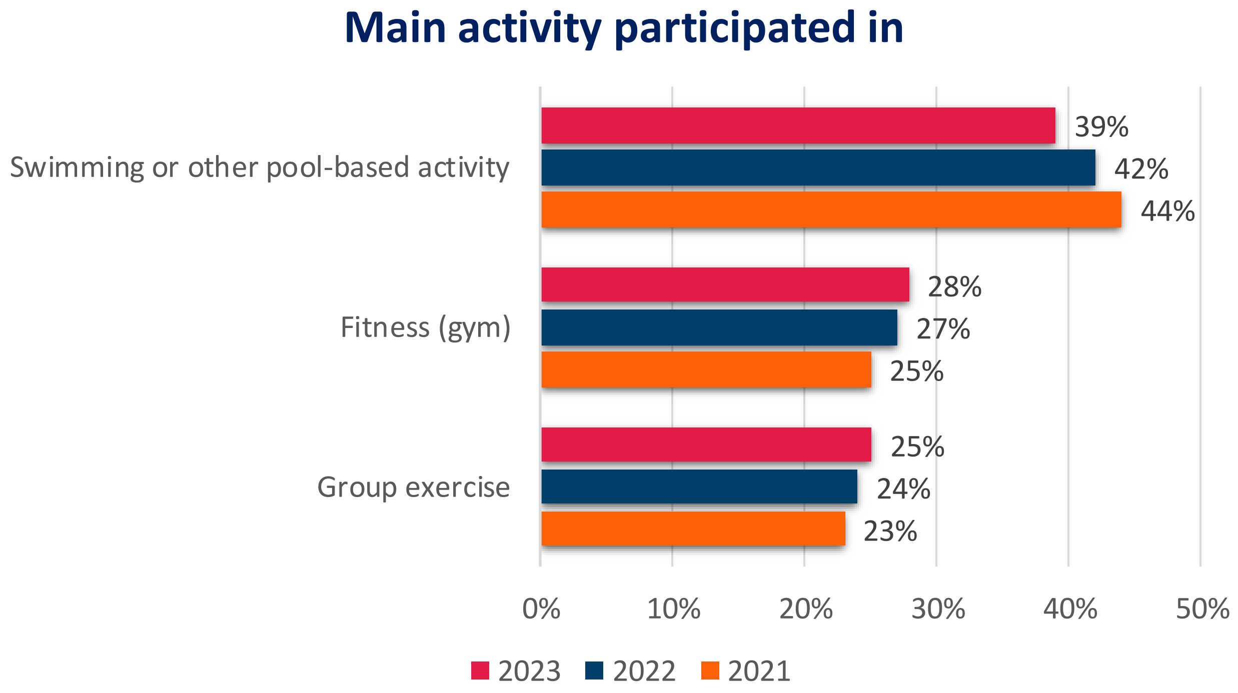


Since 2021, the main mode of transport to travel to the leisure centre has changed, with a 5% increase in those that drive and a 3% decrease in those that walk

Top 3 Main activities participated in?
2023 vs 2022/2021



The “activity mix” of respondents has changed gradually over the last 3 years, with swimming decreasing and fitness and group exercise increasing, but swimming still represents the most quoted main activity. All other activities had less than a 3% response rate

How satisfied were you overall during your last visit?
2023 vs 2022/2021

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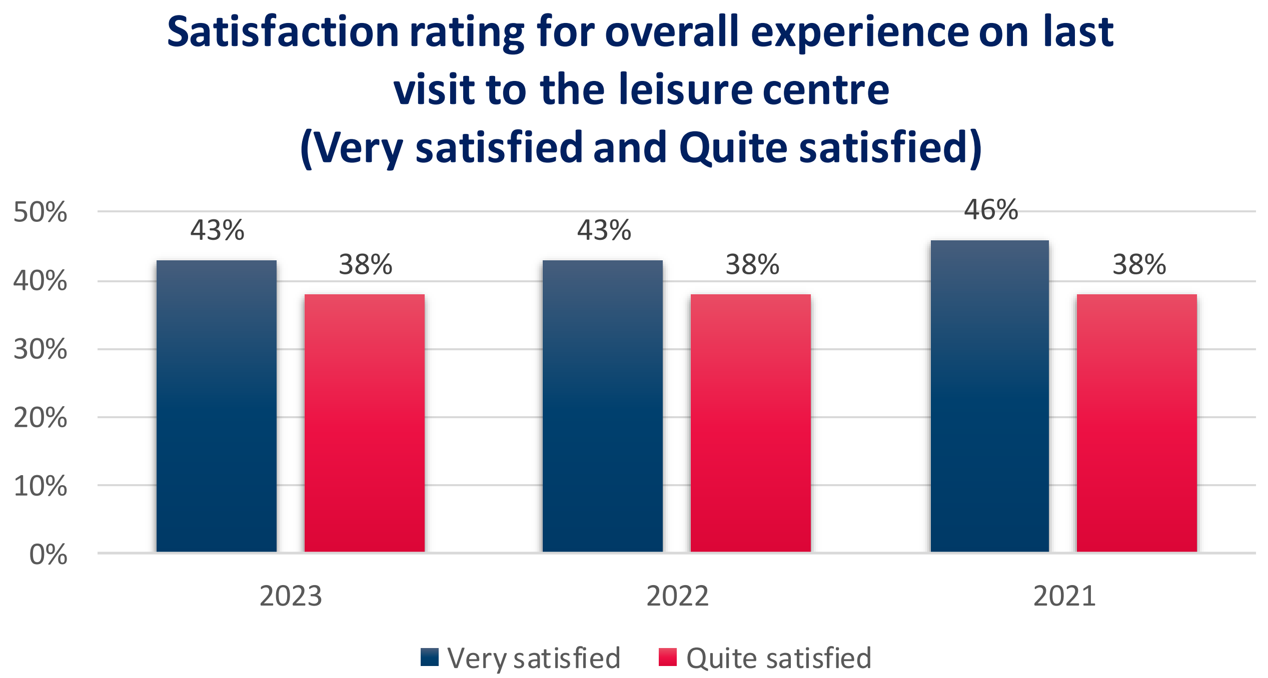
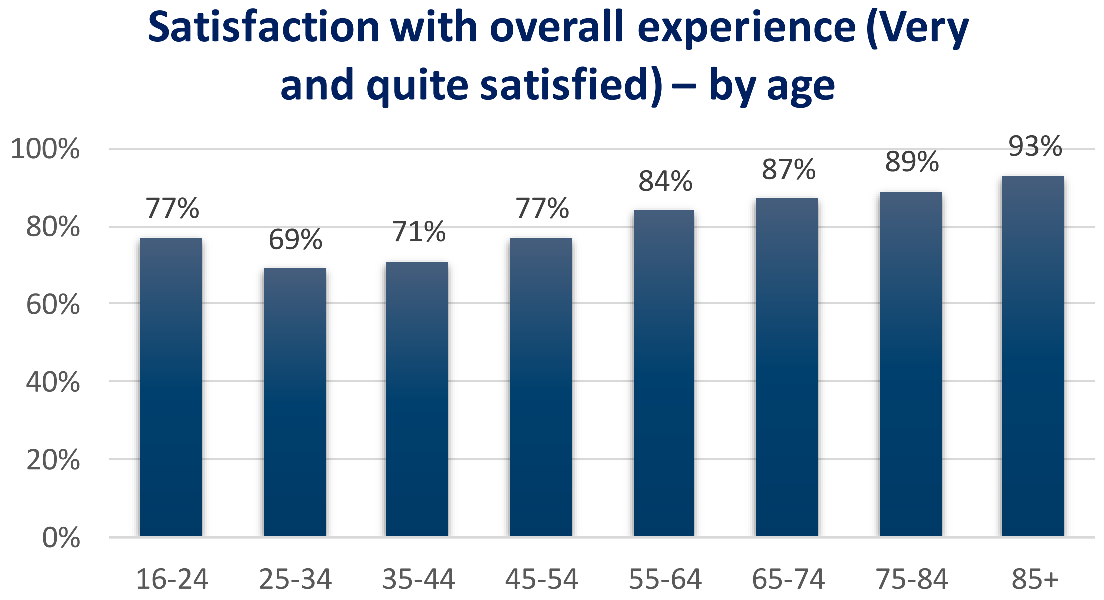


Overall satisfaction levels remain constant and still relatively high, with 43% stating they are very satisfied and a further 38% quite satisfied

Overall satisfaction levels – By age



The older age groups are significantly more satisfied than the younger ones, exception of the 16-24 years group

How likely are you to recommend your centre based on your last visit on a scale of 0-10?

2023 vs 2022/2021

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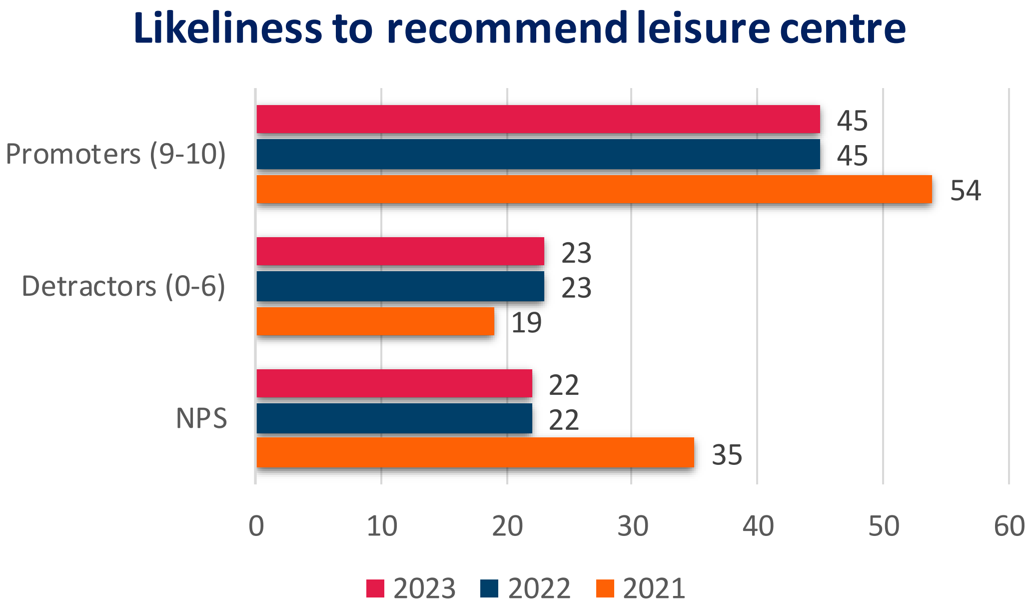
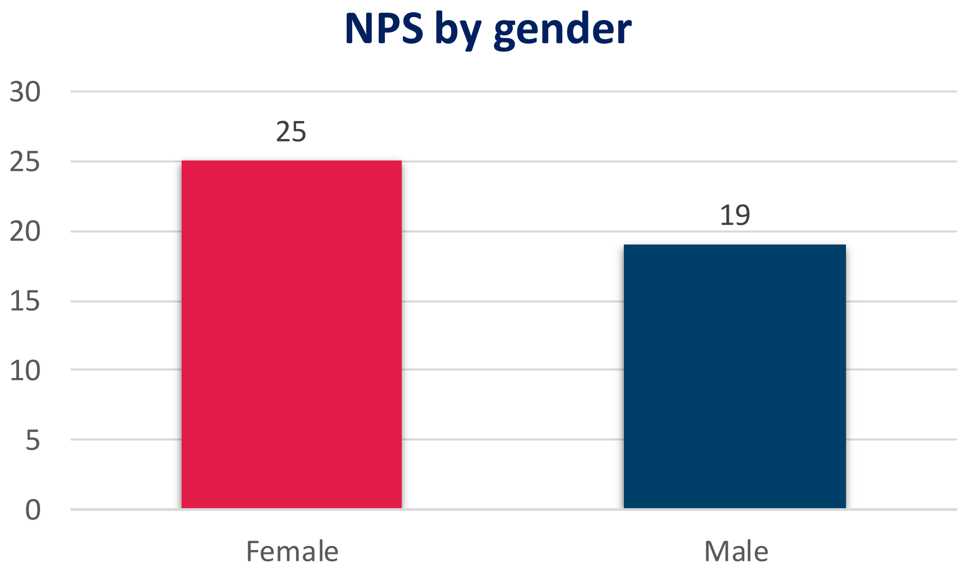


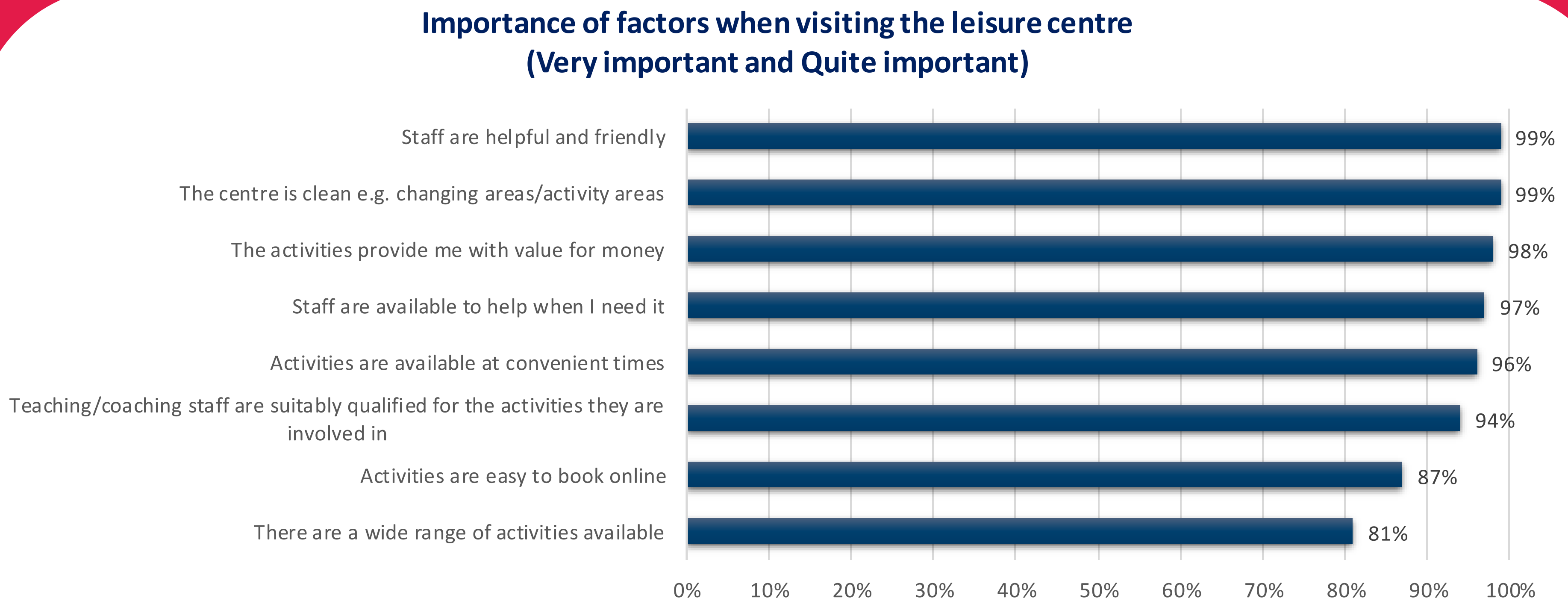
The overall NPS has remained the same as last year at 22, but down significantly from 2021 when it was at 35

Net Promoter Score – by gender



The female NPS is above the national average of 22, standing at 25, while males are below the national average at 19

How important are the following to you when visiting a leisure centre?



Staff being helpful/friendly, and cleanliness were the two most important factors to the sample when thinking about visiting a leisure centre and have been over the last 3 years. However, value for money has increased from 82% in 2022 to 98% this year

How satisfied are you with the following elements related to your centre?

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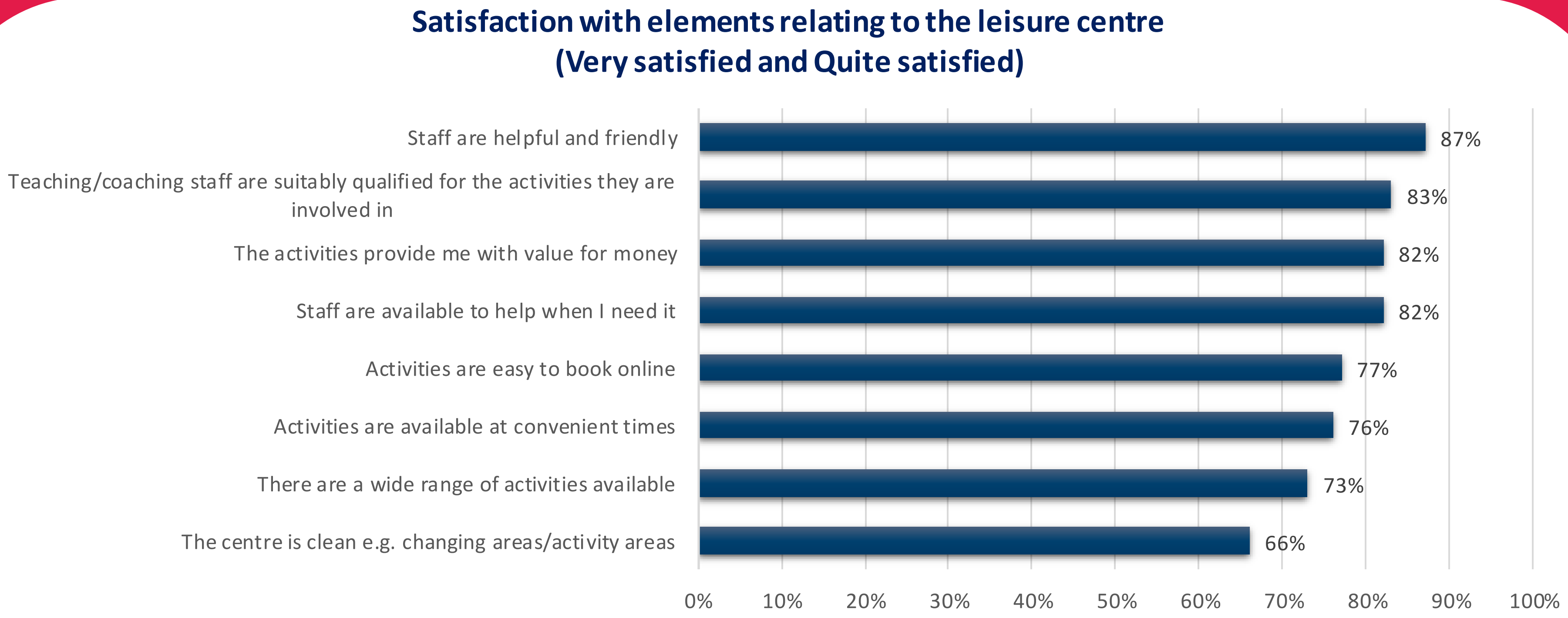
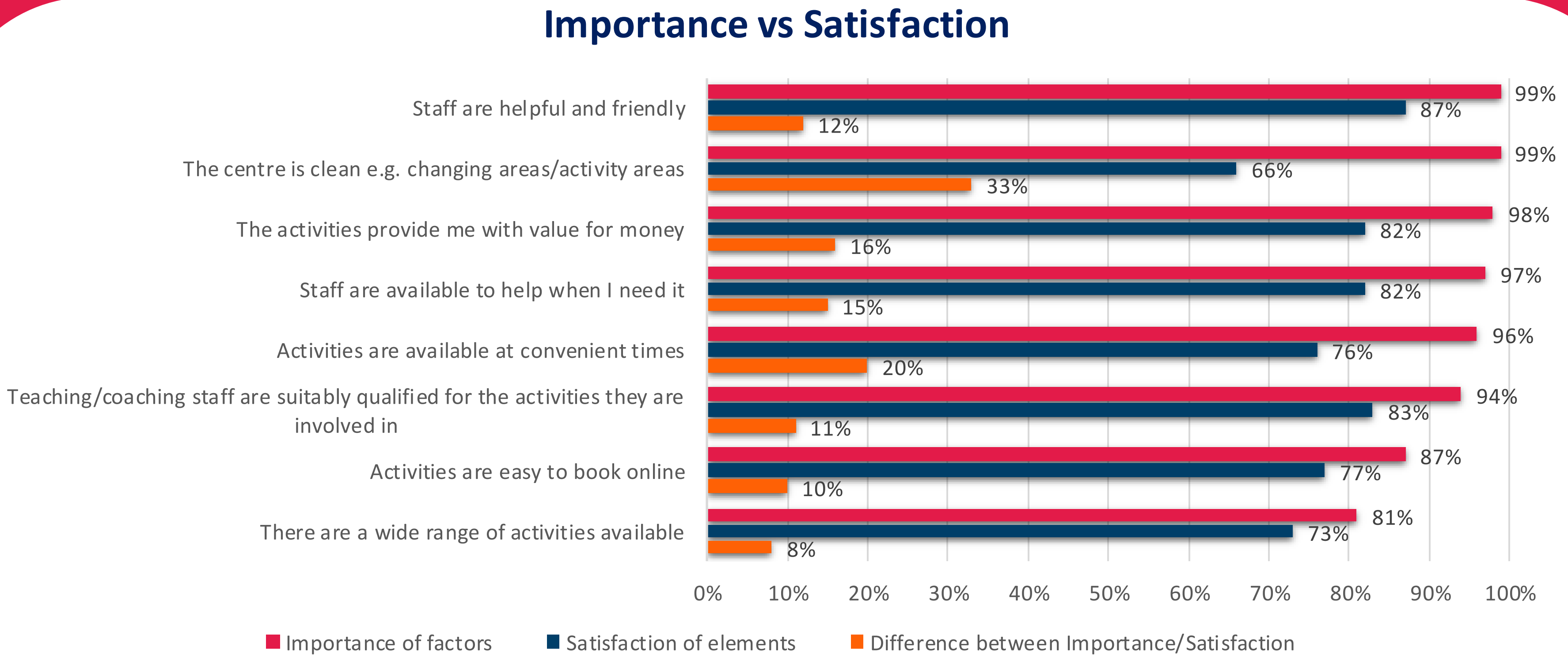


Staff being helpful/friendly was the most satisfactory element relating to the leisure centre experience, with 87% of the sample agreeing that they were very or quite satisfied

Comparison Of Importance V Satisfaction Ratings



The main "gap" between Important and Satisfaction is in cleanliness, where there is a 33% gap between how important it is to customers and how well it is actually being delivered

Cost-of-living impact

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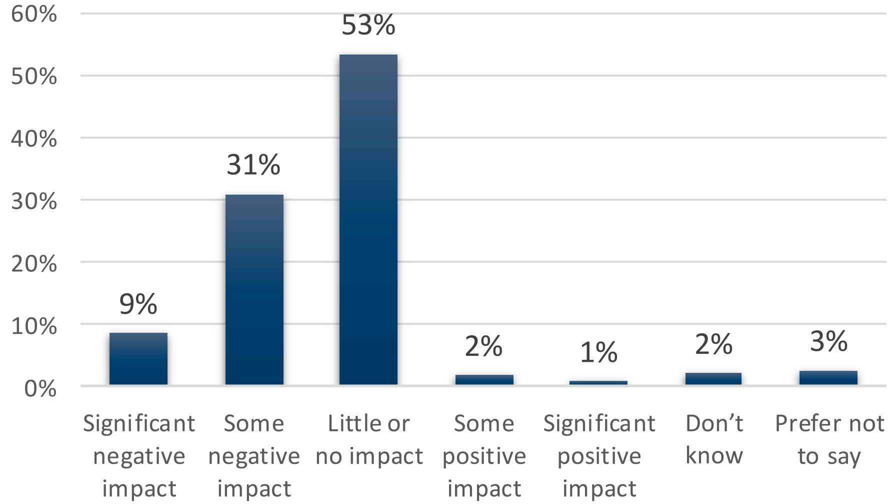
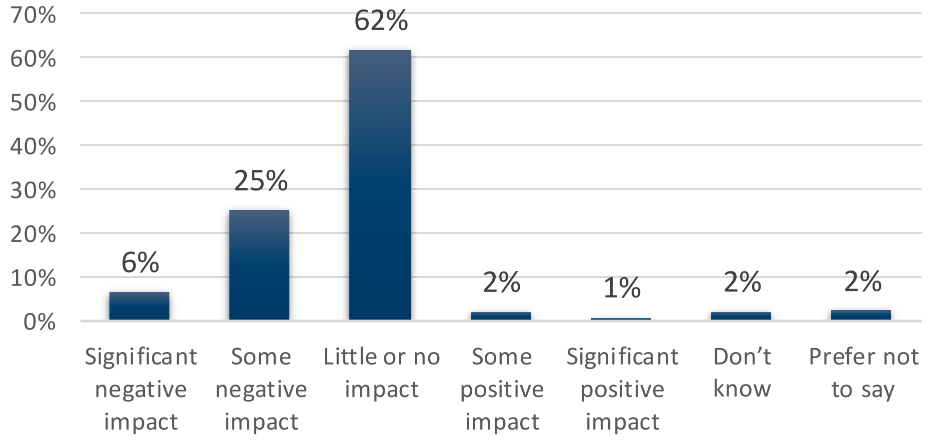
What impact, if any, has the cost-of-living increase had on your ability to be active?



What impact, if any, has the cost-of-living increase had on your use of sports, leisure and health/fitness facilities?



40% of respondents said the cost-of-living increase had had significant or some negative impact on their ability to be active and 31% said it had had significant or some negative impact on their use of sports, leisure and health/fitness facilities

In the past week, on how many days have you done a total of 30 minutes or more of physical activity, which was enough to raise your breathing rate? Within the centre vs outside and recreational exercise

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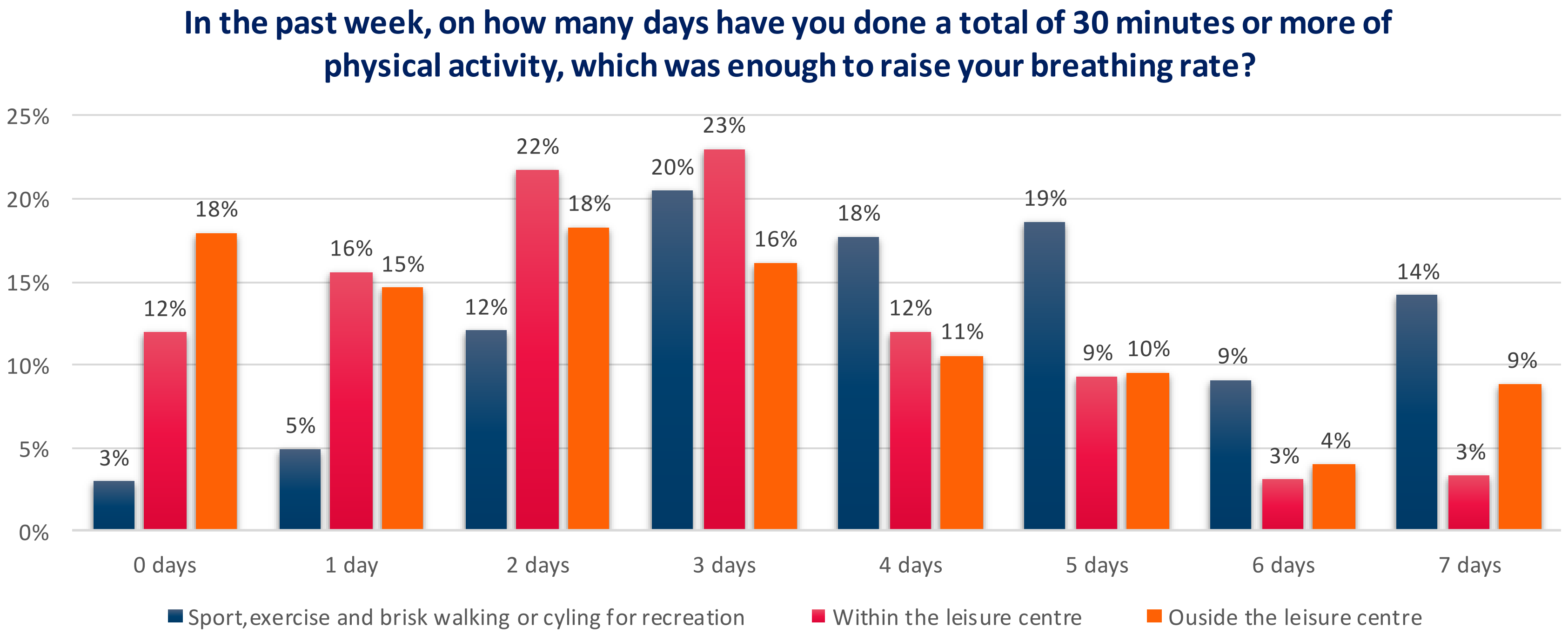
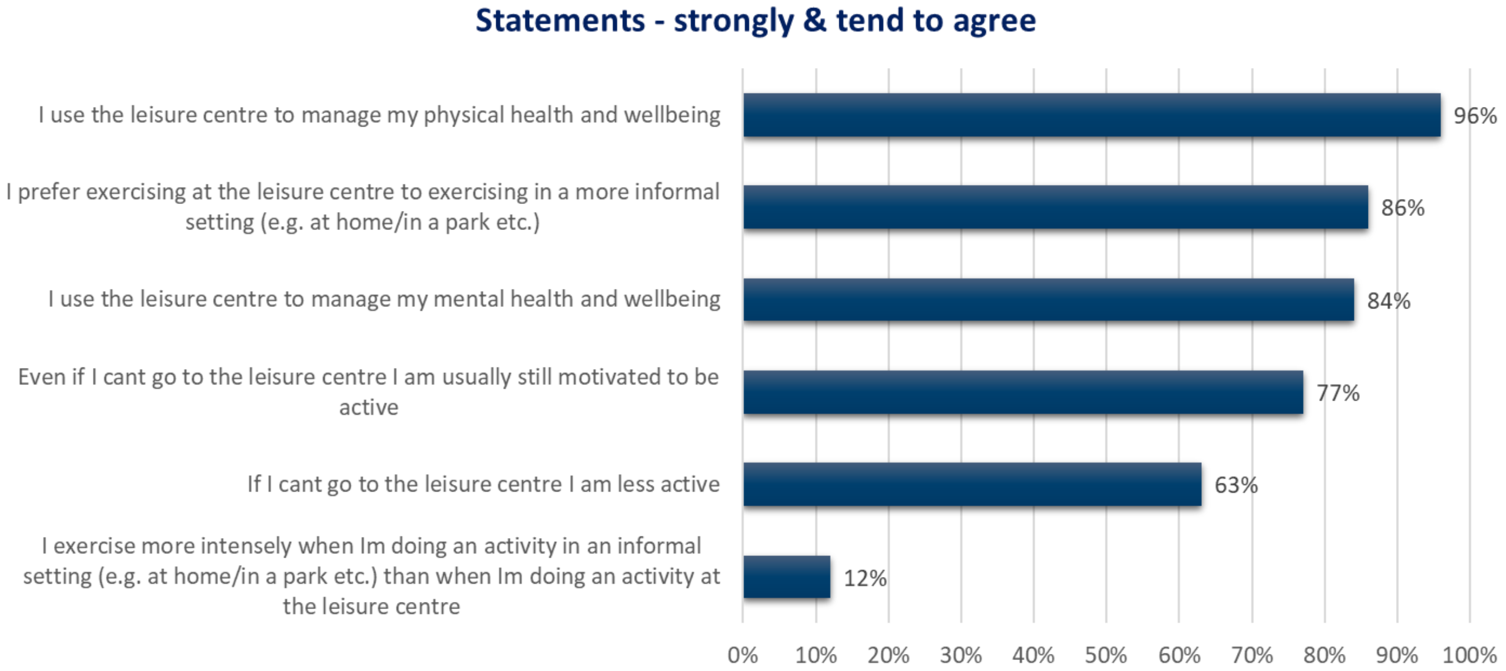


42% state that they do general sport, exercise and brisk walking or cycling for recreation at least 5 times a week compared to 23% when just considering outdoor exercise and 15% if just within a leisure centre

To what extent to you agree with the following statements?

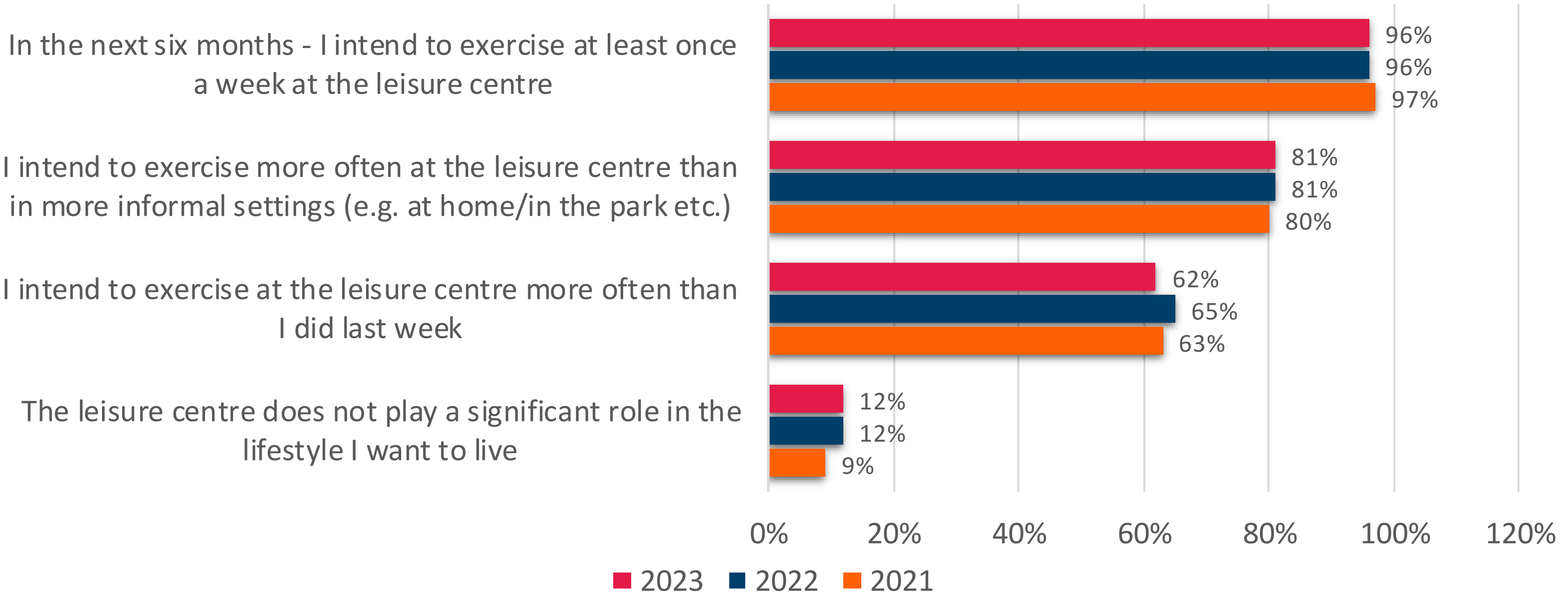


96% of the sample said they use the leisure centre to manage their physical health and wellbeing and 86% prefer exercising in the leisure centre than in a more informal setting

Future intentions around activity

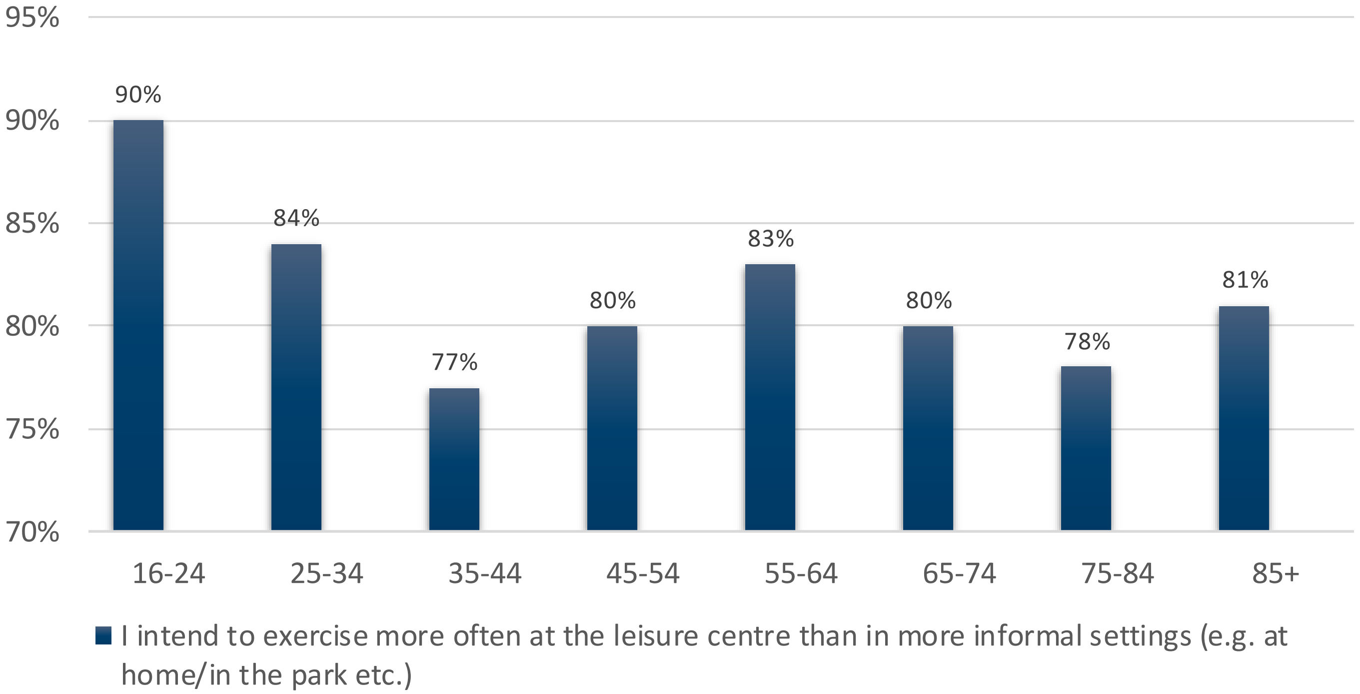
2023 vs 2022/2021

Future Intentions - strongly and tend to agree



Future intentions around activity have not changed significantly over the last 2 years with still 96% stating that they intend to exercise at least once a week in the centre over the next 6 months

Exercise Intentions – by age



16–24-year-olds were the age group that have the strongest intentions to exercise more often at the leisure centre than in more informal settings

Please contact Mike Hill at Mikehill@active-net.org for more information

Thank you