SPORT ENGLAND

Moving Communities

Understanding public leisure’s contribution to active communities

# Customer Experience Survey 5 – October 2024

# WHAT IS MOVING COMMUNITIES?

Moving Communities

**Local leisure plays a vital role in the health and wellbeing of local communities by providing accessible opportunities to get active. This is why Sport England has developed Moving Communities.**

- ✓ **Over 1,300 sites in England.**
- ✓ **6 KPIs: participation, throughput, social value, finance, customer experience, and service delivery.**
- ✓ **It is free for Local Authorities and where relevant, their service delivery**
- ✓ **Explores financial performance alongside understanding how effective the service is and for whom and the impact on local communities**
- ✓ **Identifies opportunities for continuous improvement**
- ✓ **Used to drive decision making and investment**

# Background and Methodology

- The Moving Communities Customer Experience Survey was carried out over a 19-week period from June to October 2024, 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-selecting, 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 four 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

Up 10% on last year!

**43,602**

**RESPONDENTS**

**42**

**OPERATORS**

**158**

**LOCAL AUTHORITIES**

**560**

**SITES**

# Key Messages

## Sample profile

- Since 2021, the gender split of respondents has remained consistent, with females being over-represented at 64/65%. 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 2024 survey is are very similar to the October 2021, 2022, and 2023 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 34%. All other activities had less than a 3% response rate.

## Satisfaction levels and NPS

- Overall satisfaction levels remain constant and still relatively high, with 46% stating they are very satisfied and a further 34% quite satisfied. The older age groups are generally more satisfied than the younger ones with the exception of the 16-24 year age group.

- The overall NPS has increased since last year at 28 but is still down significantly from 2021 when it was at 35. The female NPS is above the national average of 28, standing at 31, while males are below the national average at 19. Older age groups have significantly higher NPS than younger age groups

# 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 4 years. However, value for money has decreased from 98% in 2023 to 90% 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 same figure as in 2023)

- The largest "gap" between Importance and Satisfaction is cleanliness, where there is a 24% gap between how important it is to customers and how well it is being delivered.

**Impact of cost-of-living crisis**

- Like last year, 31% reported that the rise in cost of living continues to have a significant or moderate negative effect on their usage of sports, leisure, and health/fitness facilities.

# Key Messages

## Environmental Sustainability

- 33% considered environmental sustainability to be quite important, while 31% felt it was neither important nor unimportant. It is much more important to females than males

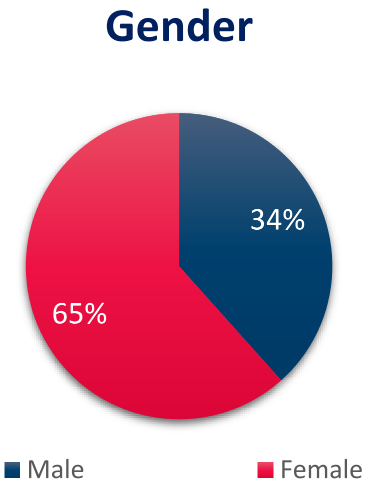
- To support environmental sustainability, 30% of the total responses indicated that they would opt for activities closer to home to minimise travel when selecting sports and physical activities. This was the most popular way of supporting this aim

- Only 28% agreed that their leisure centre was doing enough to adapt physical activity options to be more environmentally sustainable

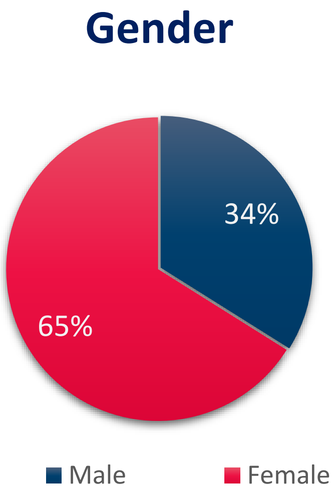
NB These questions were asked for the first time in this 2024 survey

# Gender spilt

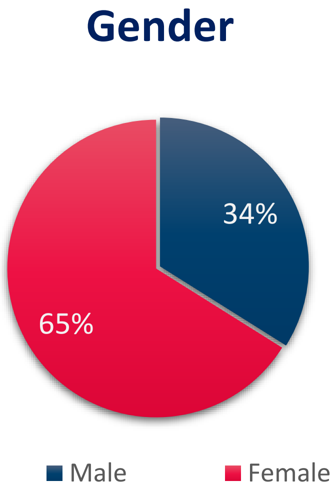
### October 2021



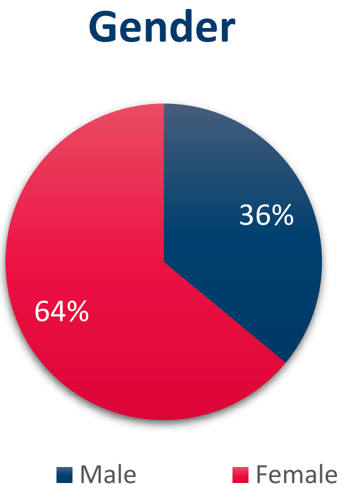

### October 2022




### October 2023

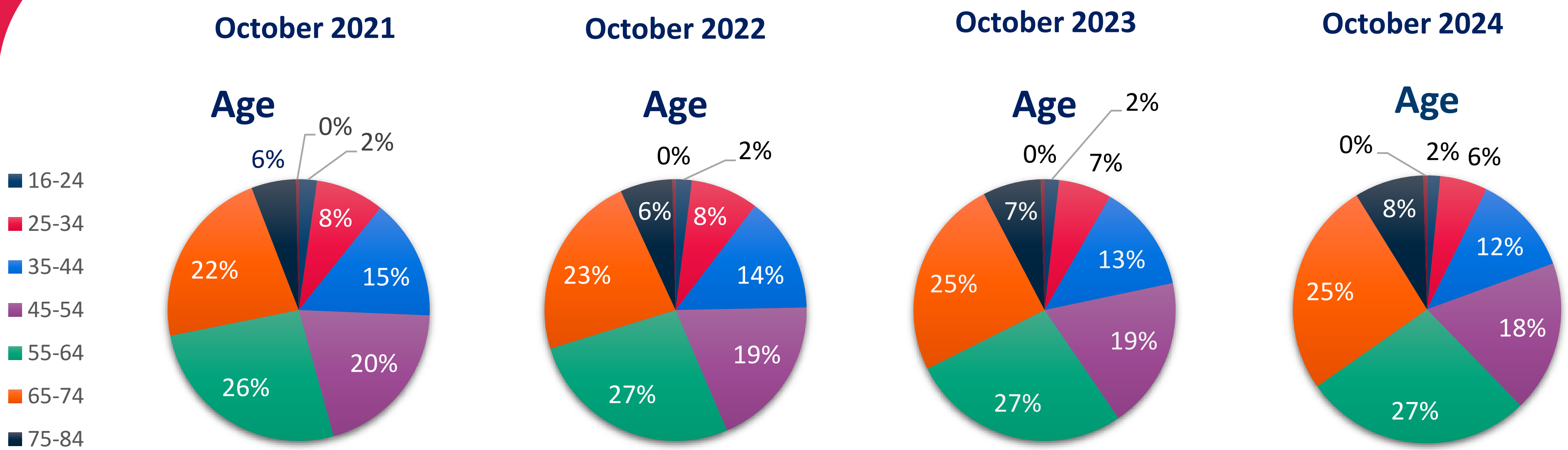



### October 2024




Since 2021, the gender split of respondents has remained consistent, with females being overrepresented at 64/65%. Moving Communities analysis of usage of leisure centres over the last 12 months suggest that 54% of users are typically female.

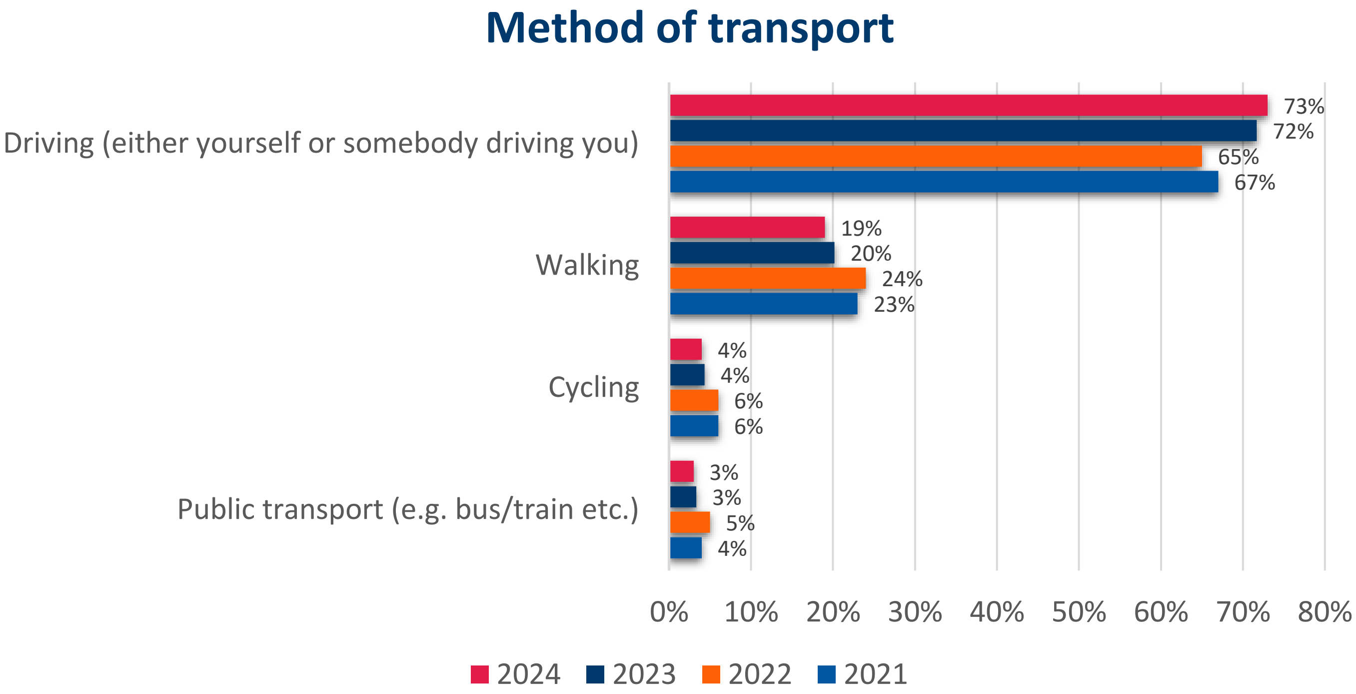
# Age profile




The age profile of the October 2024 survey is are very similar to the October 2021. 2022 and 2023 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

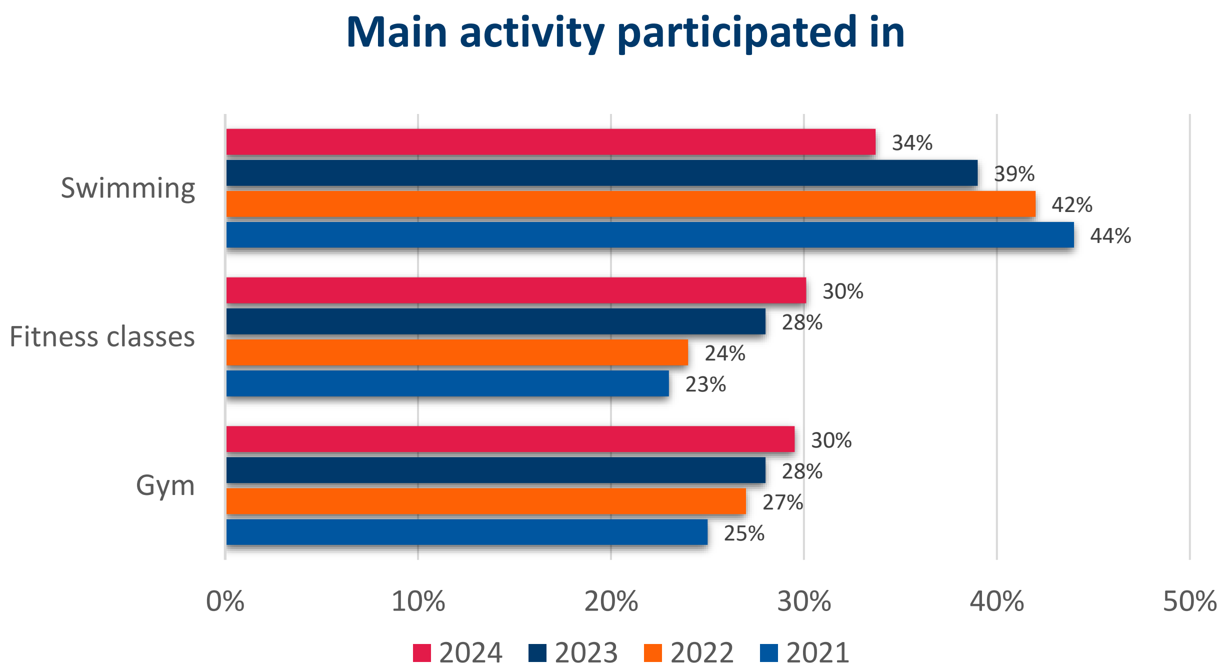
# How did they get to their centre?

2024 vs 2023/2022/2021



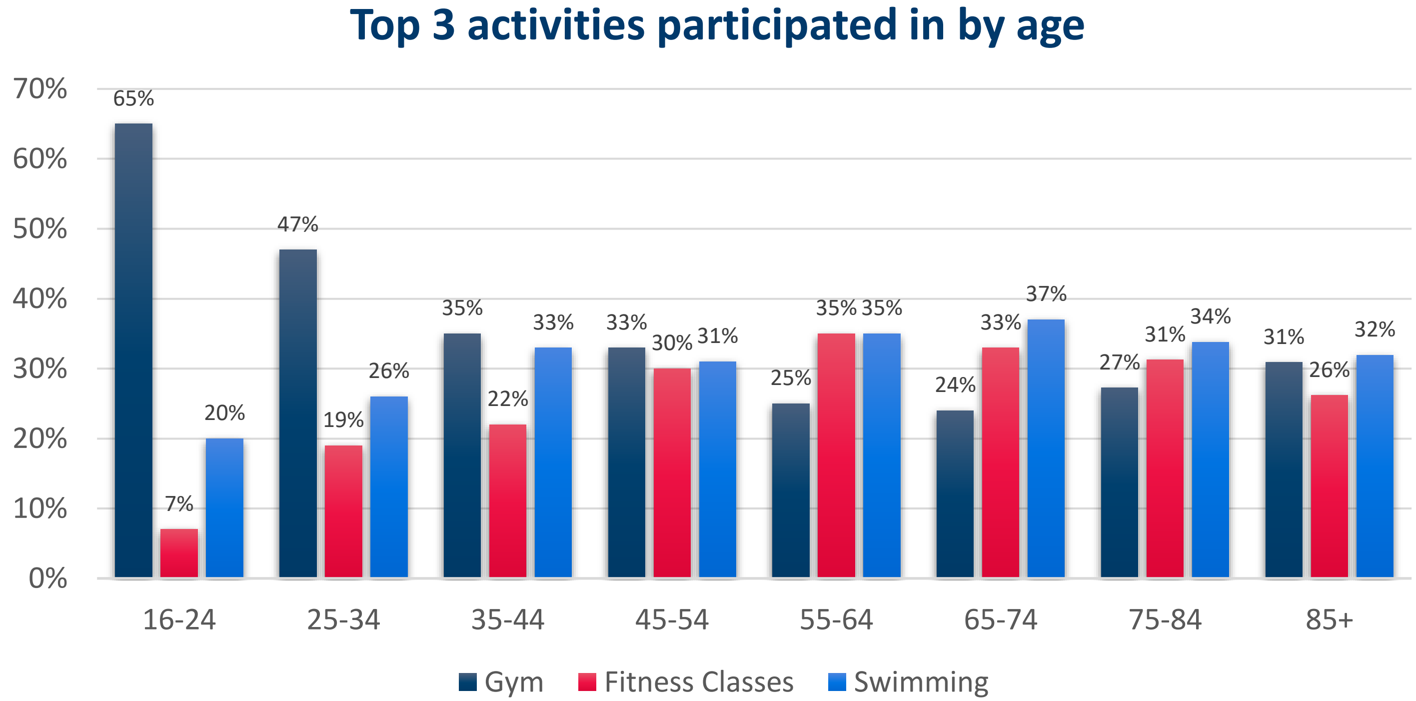

Since 2021, the main mode of transport to travel to the leisure centre has changed, with a 6% increase in those that drive and a 4% decrease in those that walk

# Top 3 Main activities participated in?
2024 vs 2023/2022/2021




The "activity mix" of respondents has changed gradually over the last 4 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

# Top 3 Main activities participated in?
By Age



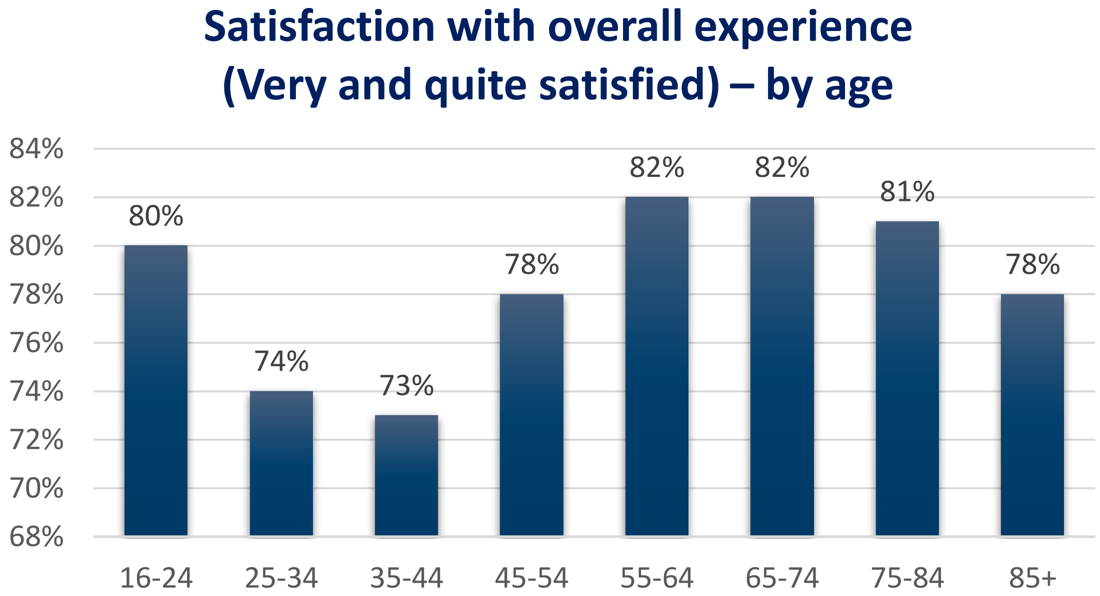

Gym usage is highest among younger adults, with 65% of 16–24-year-olds participating, but declines with age. Swimming and fitness classes see increased popularity among older age groups, with swimming peaking at 37% for those aged 65-74, and fitness classes gaining traction in adults aged 45 and above.

# How satisfied were you overall during your last visit?

2024 vs 2023/2022/2021


Overall satisfaction levels remain constant and still relatively high, with 46% stating they are very satisfied and a further 34% quite satisfied

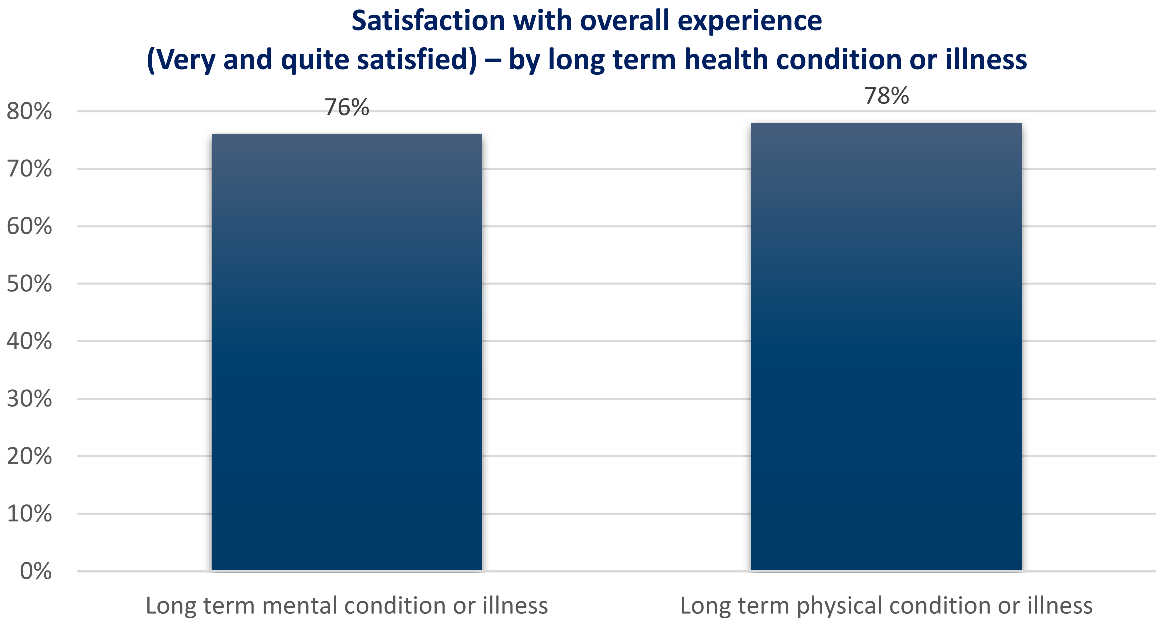
# Overall satisfaction level
By age




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

# Overall satisfaction level

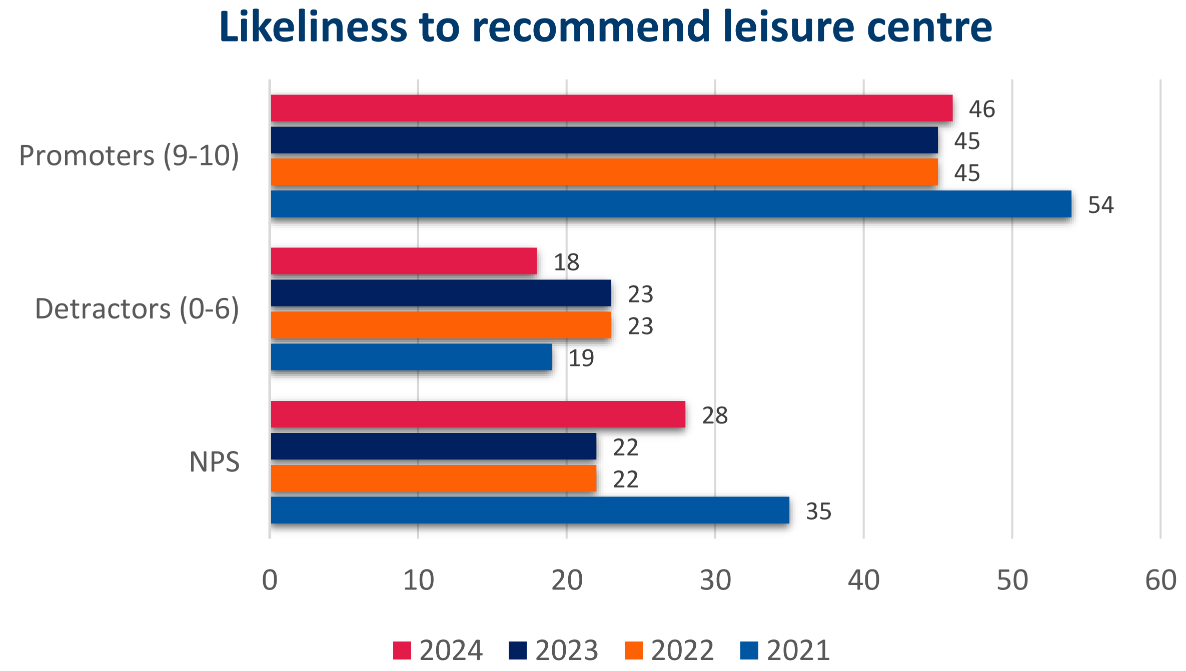
## By long term health condition or illness




There is a similar level of overall contentment between those with mental and those with physical conditions, with only a small difference in satisfaction between the two groups. Their satisfaction levels are slightly below the national score though which is 80%

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

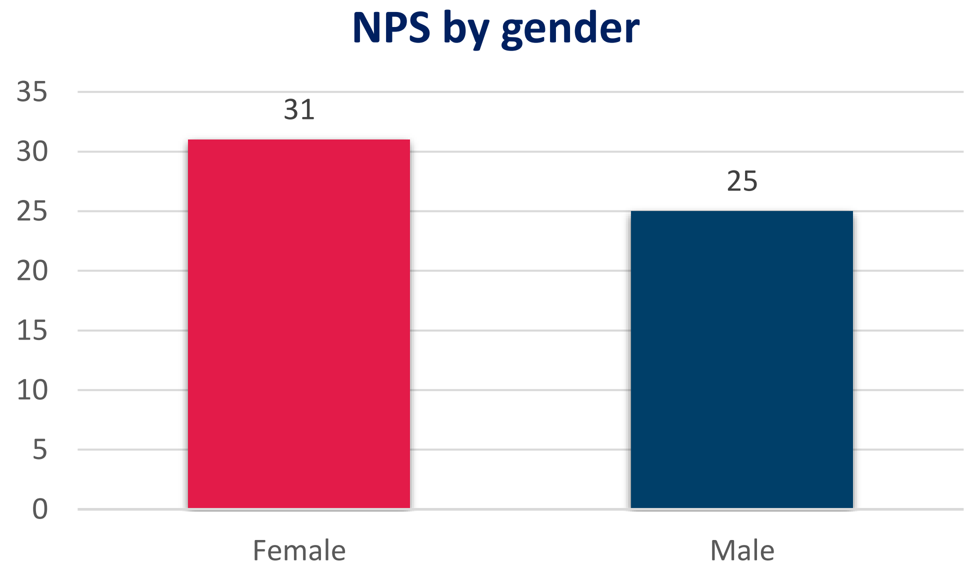
2024 vs 2023/2022/2021




The overall NPS has increased by 6 since last year, now at 28, but still down since 2021 when it was at 35

# Net Promoter Score

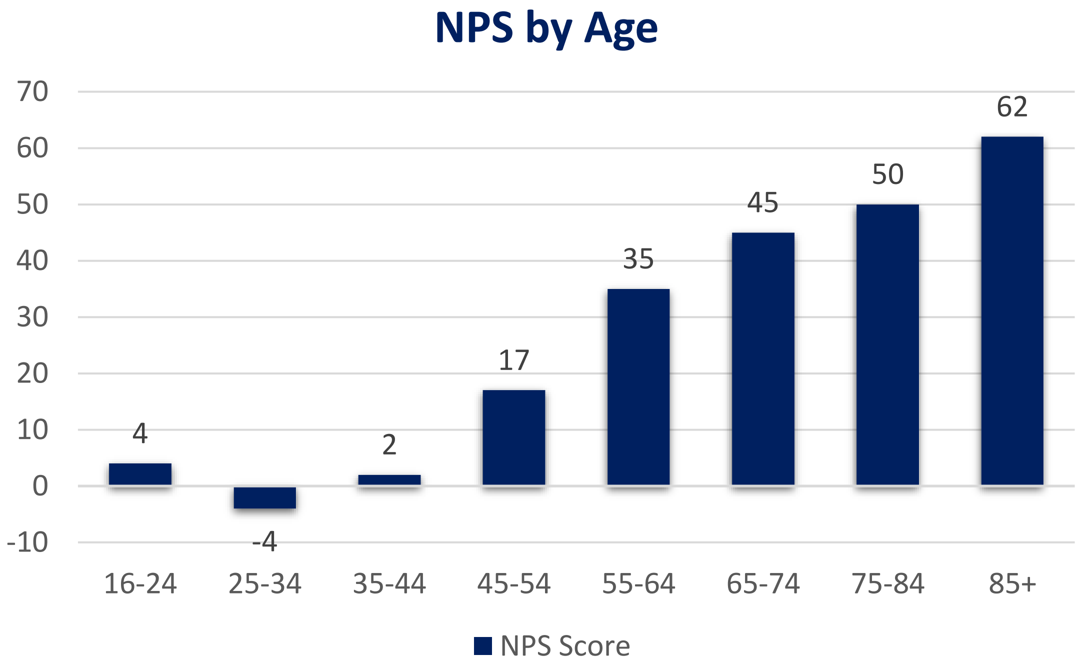
By gender




The female NPS is above the national average of 28, standing at 31, while males are below the national average at 25

# Net Promoter Score

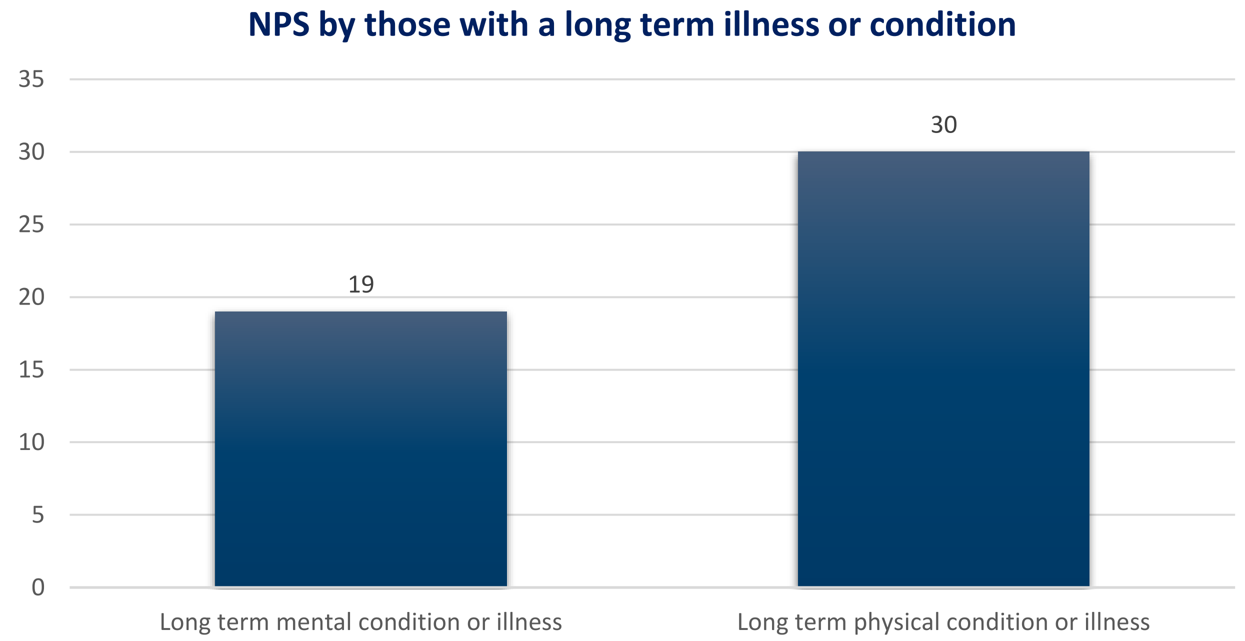
By age




NPS show a marked increase with age, with younger age groups (16-34) reporting lower satisfaction, and older adults (55+) expressing significantly higher levels of loyalty and satisfaction.

# Net Promoter Score

## By long term health condition or illness



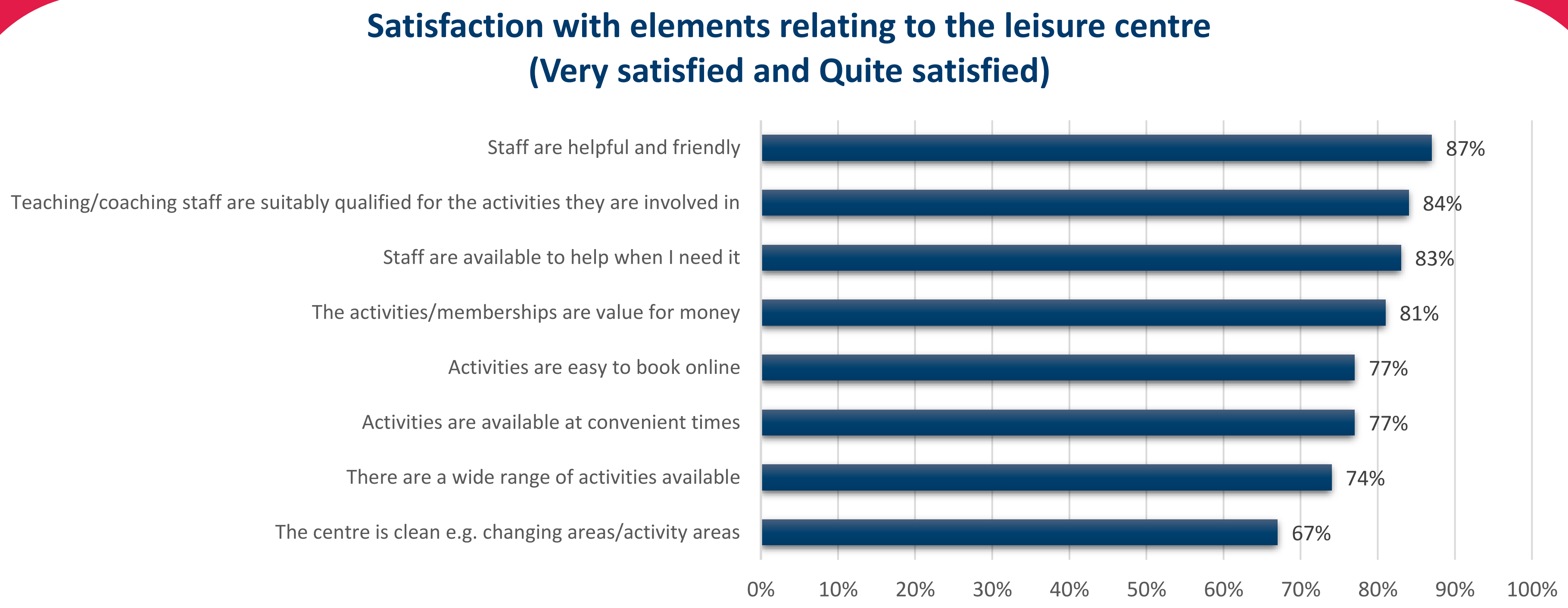

The NPS for those with mental health condition/illness is 19, significantly below the national score of 30, suggesting moderate likelihood to recommend the leisure centre, possibly due to limited accessibility or tailored support. In contrast, those with physical health condition/illness score 30, possibly reflecting better experiences or more suitable facilities for their needs.

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

## Importance of factors when visiting the leisure centre (Very important and Quite important)

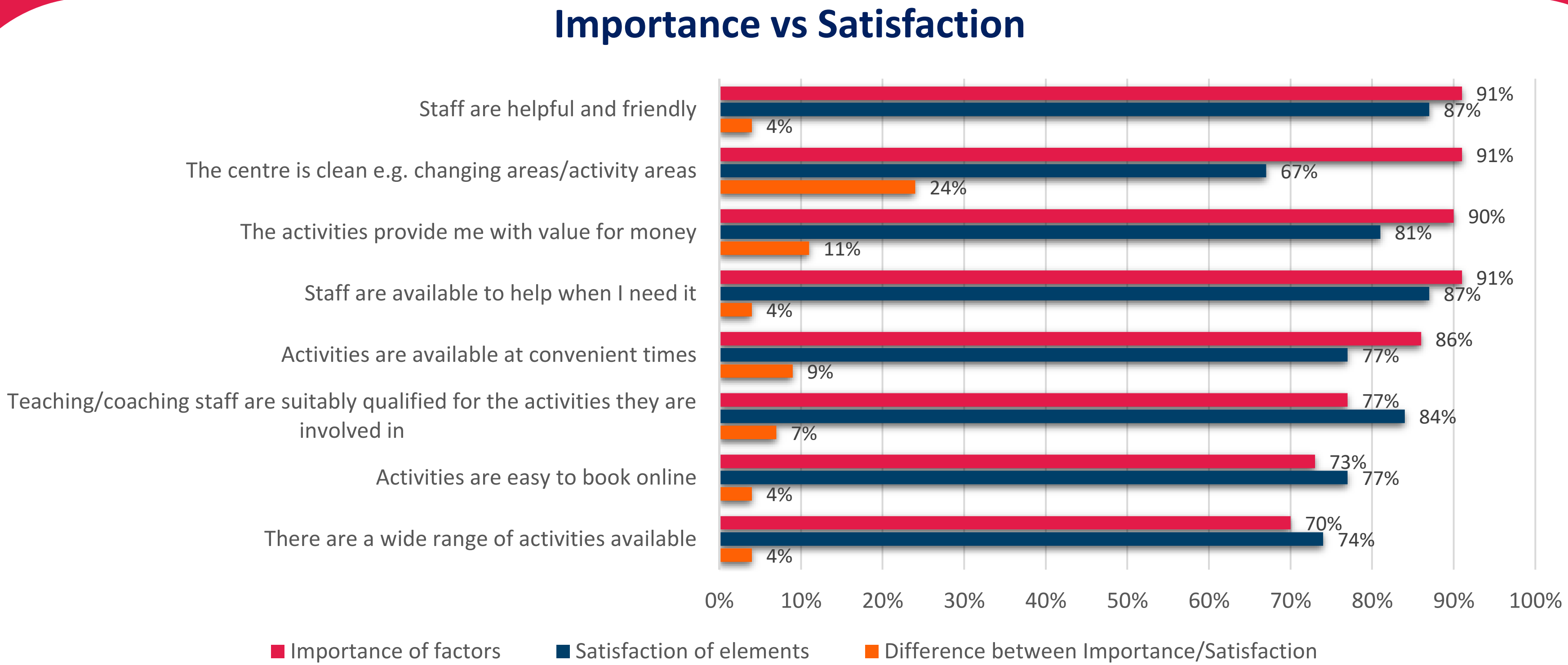

Staff being helpful/friendly, and cleanliness were the two most important factors to the sample when thinking about visiting a leisure centre and have been over the last 4 years. However, value for money has decreased from 98% in 2023 to 90% this year.

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




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

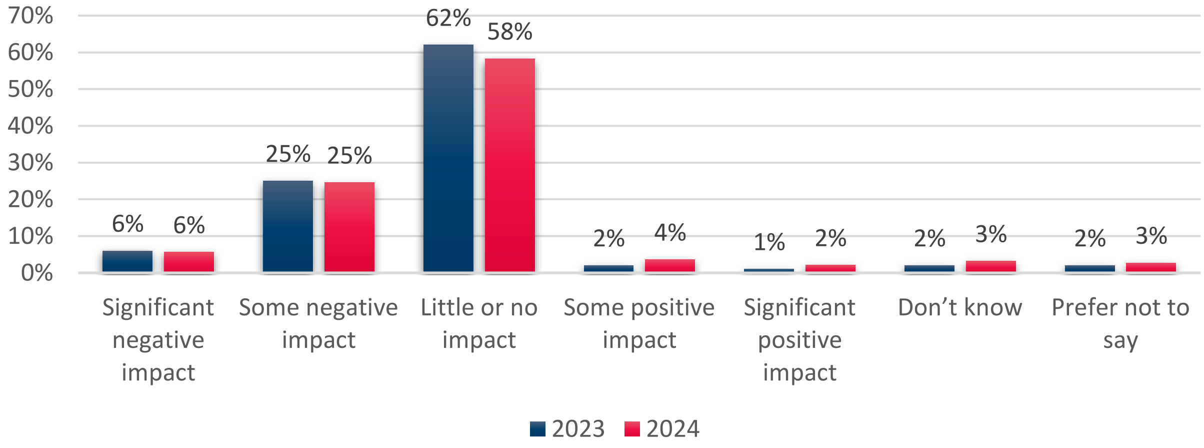
# Comparison Of Importance V Satisfaction Ratings




The largest "gap" between Importance and Satisfaction is in cleanliness, where there is a 24% gap between how important it is to customers and how well it is being delivered – this gap is less than the 33% in 2023

# Cost-of-living impact
2023 vs 2024

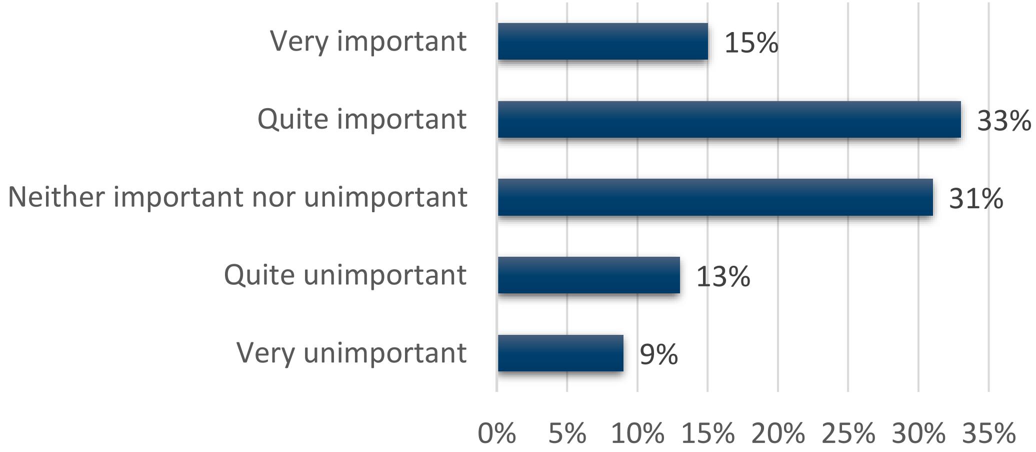
## What impact, if any, has the cost-of-living increase had on your use of sports, leisure and health/fitness facilities?




31% said the cost-of-living increase still had significant or some negative impact on their use of sports, leisure and health/fitness facilities, remaining at the same level as 2023

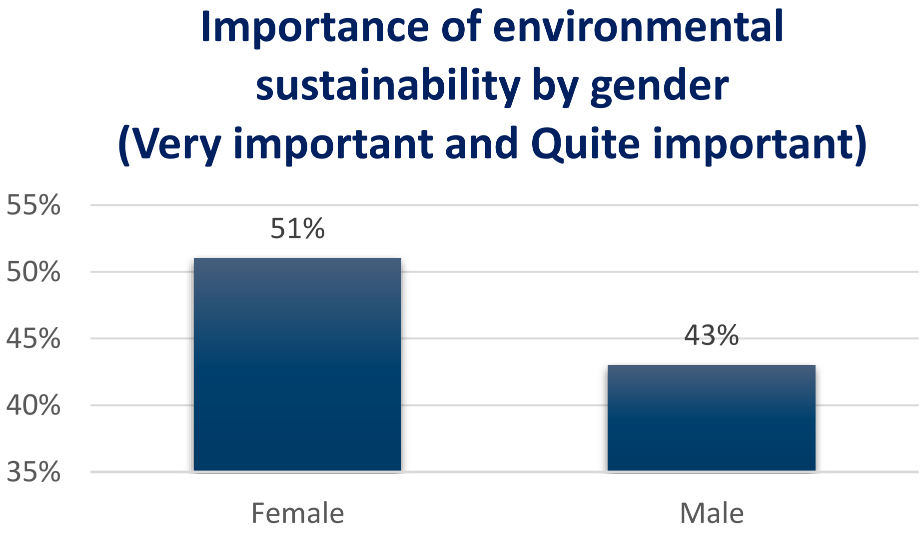
# Environmental Sustainability

## Importance of environmental sustainability in your sport and physical activity choices?



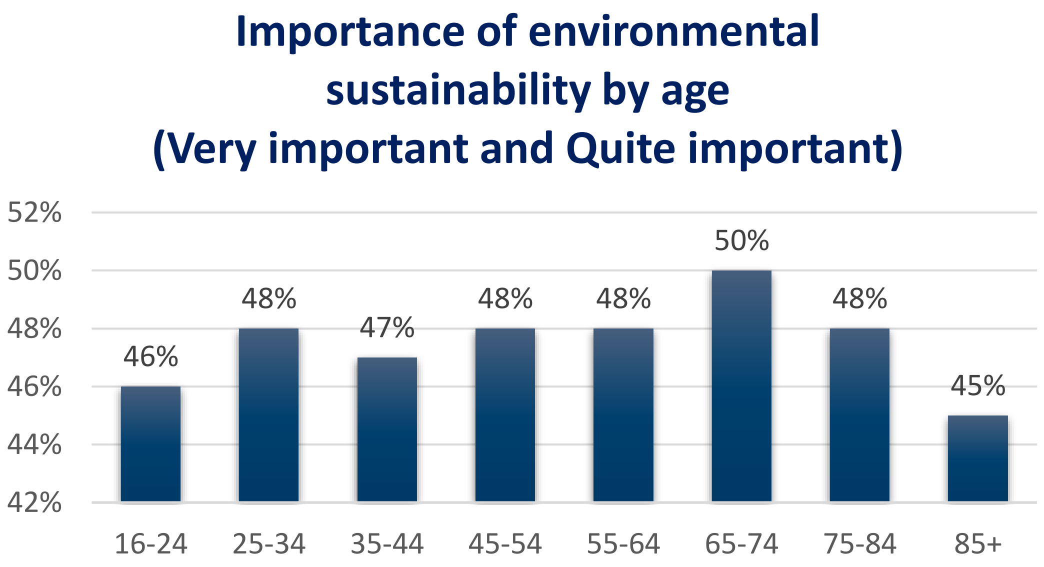

48% considered environmental sustainability to be Very or Quite important, while 31% felt it was Neither important nor unimportant

# Importance of Environmental Sustainability
By gender




Environmental sustainability is considered more important by females (51%) than males (42%), with a higher percentage of females rating it as "very" or "quite" important.

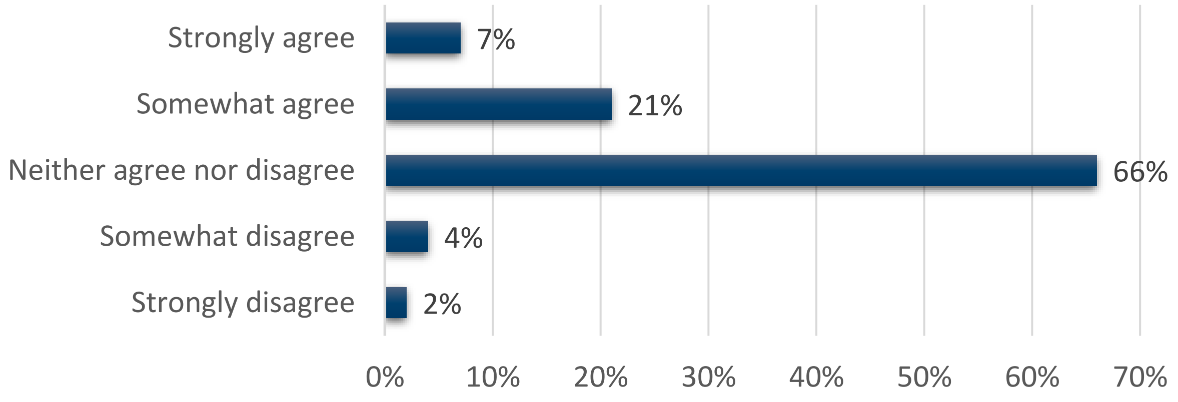
# Importance of Environmental Sustainability
By age




The importance of environmental sustainability remains fairly consistent across age groups, with percentages ranging from 45% to 50%. 16-24 and 85+ age groups report the lowest at 46% and 45%, respectively.

# Environmental Sustainability

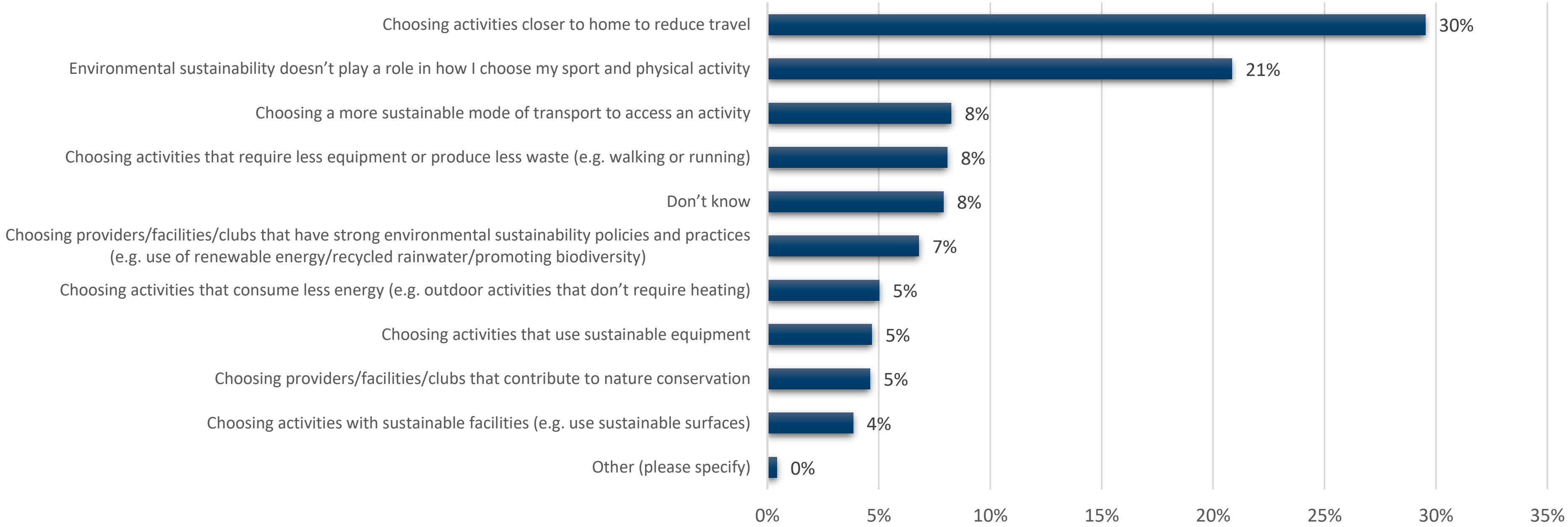
## To what extent do you agree or disagree that your leisure centre/provider is doing enough to adapt physical activity opportunities to be more environmentally sustainable?




66% do not have a clear opinion on whether their leisure centre is adequately adapting physical activity options to be more environmentally sustainable

# Environmental Sustainability

**In which of the following ways, if any, does environmental sustainability currently play a role in how you choose the sport and physical activity you take part in?**
**(Participants were asked to select all that apply)**




The main way customers are currently supporting environmental sustainability, is by opting to choose activities closer to home to minimise travel when selecting sports and physical activities, with 30% of the overall responses.

# Environmental Sustainability

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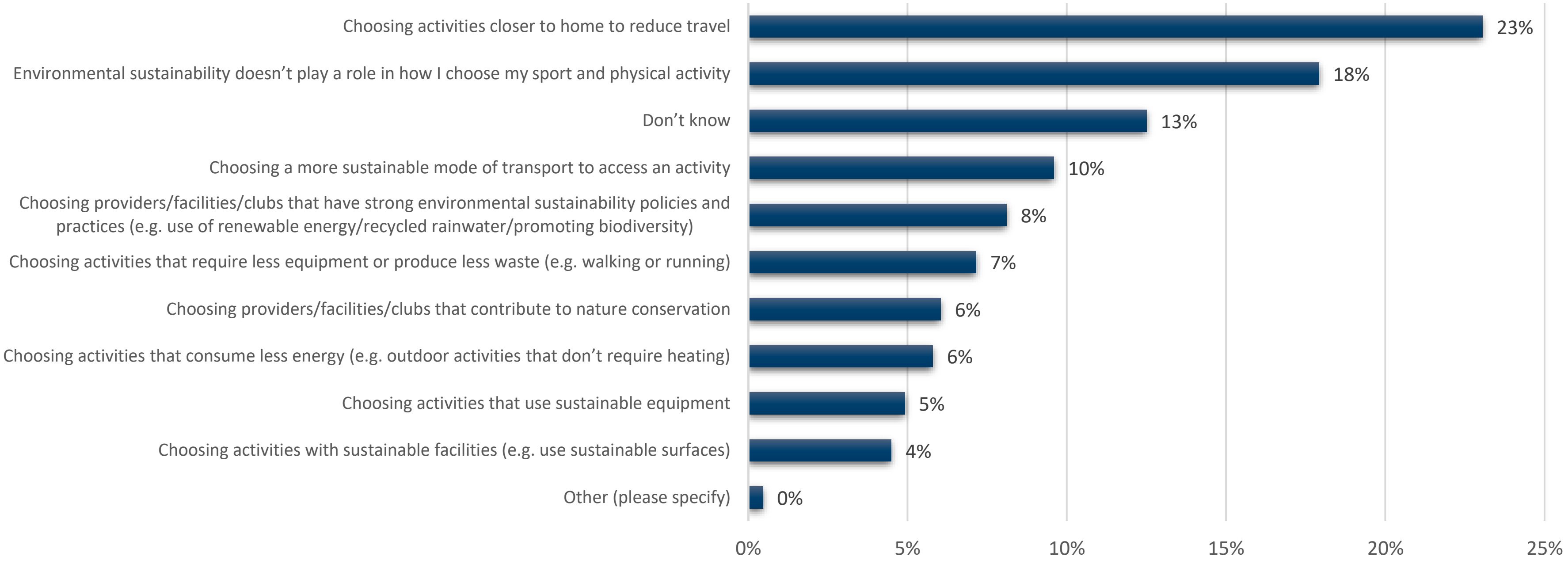
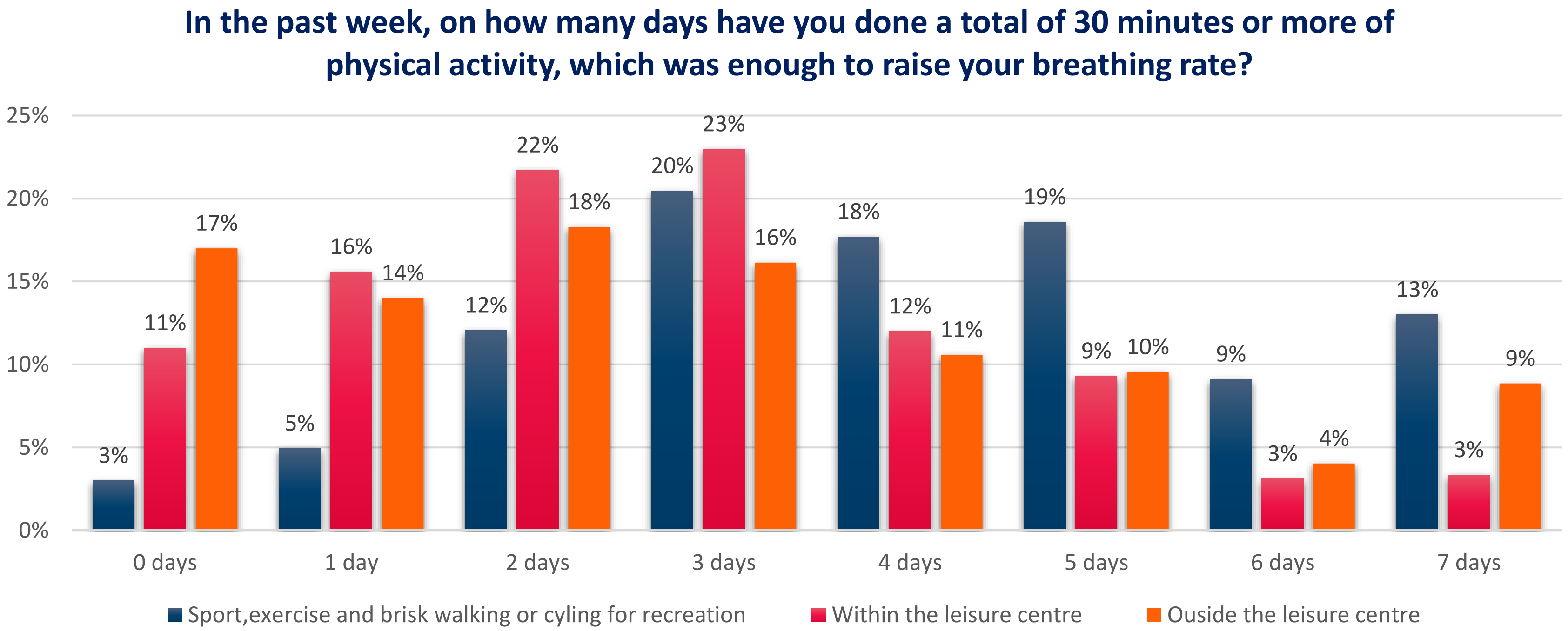
## Are you likely to do any of the following in the future? (Participants were asked to select all that apply)




To support environmental sustainability in the future, 23% of the total responses indicated participants would most likely opt for activities closer to home to minimise travel when selecting sports and physical activities

# 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

Moving Communities




41% 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

# Case Study 1 – Circadian Leisure

Circadian Trust
giving more

Moving Communities

*The Customer Experience Survey and ongoing tracking of customer feedback and NPS enables us to have a "golden thread" running through the organisation from the data, into centre service improvement plans, into budgeting and capital planning.*

*The survey provides meaningful insights into customers' perceptions, so we know where best to invest our resources. We have recently launched our new strategy, "New Horizons" following our post COVID-19 strategy, "Reset".*

*The customer experience survey helps ensure the work with our trustees, commissioners and senior team, remains an active process where the customer delivery model and wider strategy are always aligned.*

Ben Beasley – Director of Commercial Development

# Case Study 2 – Wiltshire Leisure

*Wiltshire Council is delighted to support the Moving Communities project and the development of essential insights into the leisure industry. Understanding our customer has never been more important, and the ability to access specific metrics against national benchmarks has provided powerful data.*
*We have used this internally to assess our customer experience; particularly around importance factors and satisfaction levels.*
*It's helped to shape our focus going forward, challenge assumed thinking around CX and demonstrate our performance to the council's senior leadership team.*

Alex Muse – Development Manager

# Case Study 3 – Places Leisure

*Places Leisure are proud to take part in the Moving Communities survey. We utilise the survey as a useful benchmarking tool to compare our performance against other leisure operators.*
*This survey provides valuable insights into both our strengths and areas for improvement, offering a clear view of how we measure up within the industry. By analysing the results, we gain a deeper understanding of our operational performance, which is instrumental in guiding strategic business decisions.*
*This feedback loop not only helps us pinpoint areas for immediate improvement but also supports the broader goals of our organisation by ensuring that we continue to meet industry standards and address evolving customer needs.*

**Ellouise Wood**
**Customer Relations Manager**

SPORT ENGLAND

Please contact Mike Hill at mikehill@active-insight.org for more information

# Thank you