# Moving Communities

## Understanding public leisure's contribution to active communities

## Customer Experience Survey 5 – October 2024

SPORT ENGLAND

# 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-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 three 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

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**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. 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 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.

# Key Messages

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**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 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**

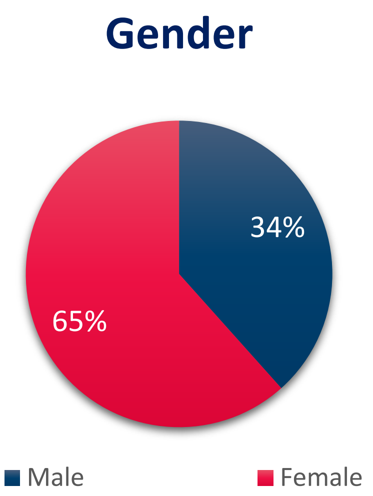
Similar to last year, 31% reported that the rise in cost of living continues to have a significant or moderate negative effect on their usage of sports, leisure, and health/fitness facilities.

**Environmental sustainability**

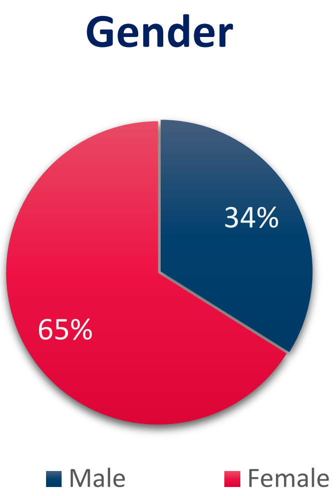
33% considered environmental sustainability to be quite important, while 31% felt it was neither important nor unimportant and 66% do not have a clear opinion on whether their leisure centre is adequately adapting physical activity options to be more environmentally sustainable.
To support environmental sustainability, 30% of the total responses, indicated respondents would choose activities closer to home to reduce travel when selecting sports and physical activities and when asked, 23% of the total responses indicated respondents are also most likely to make this choice in the future.

# Gender spilt

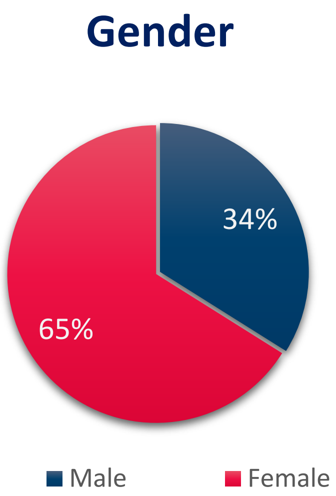
October 2021



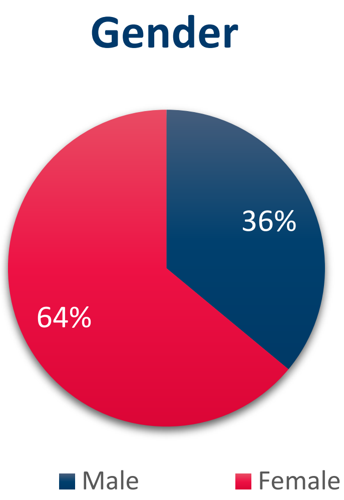

October 2022




October 2023



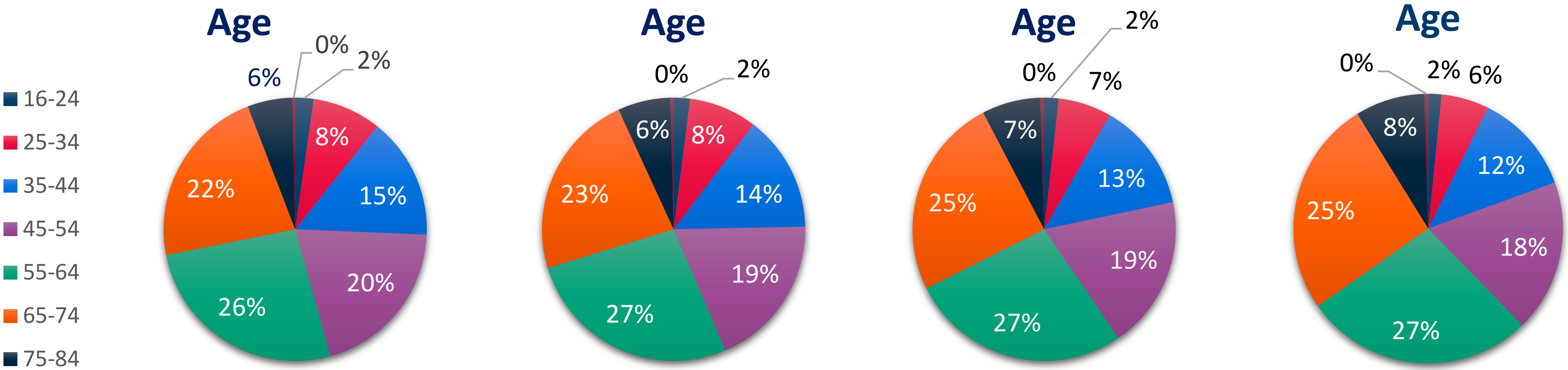

October 2024




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

October 2021 | October 2022 | October 2023 | October 2024




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

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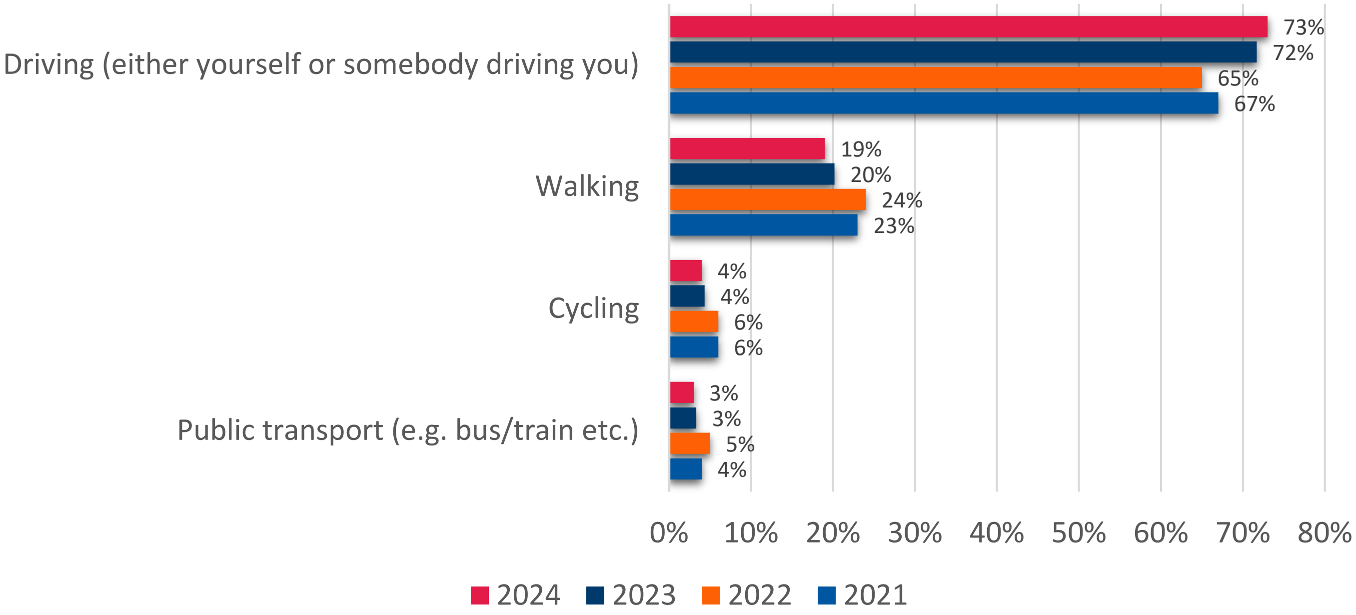
## Method of transport




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

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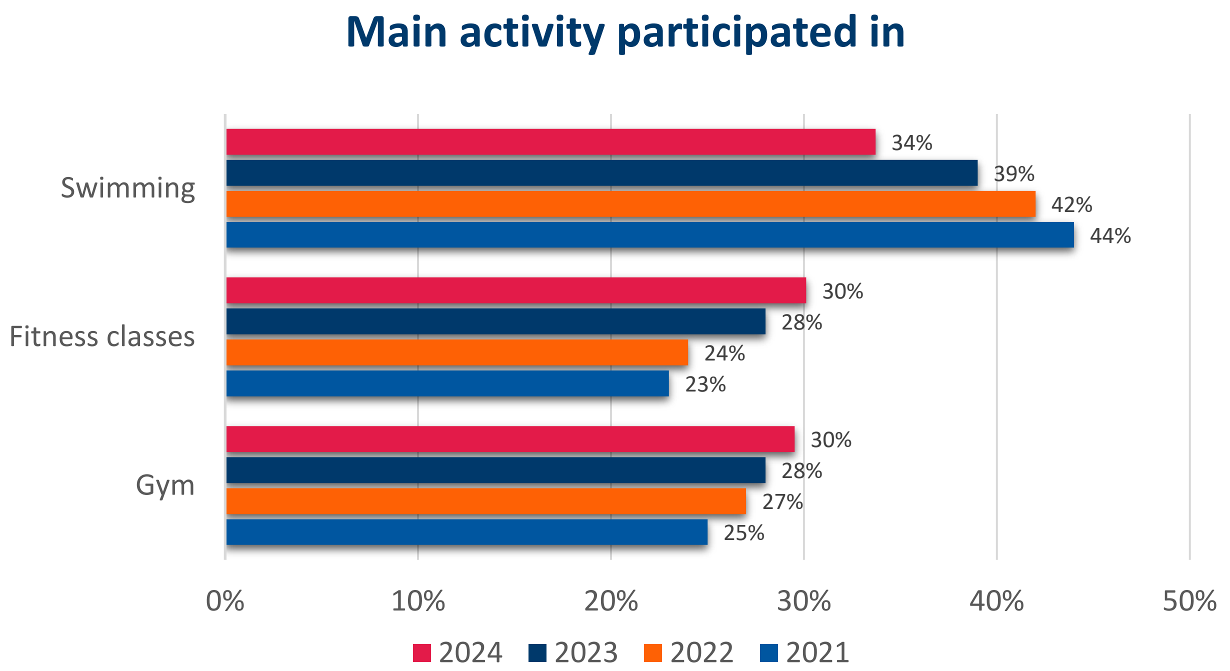
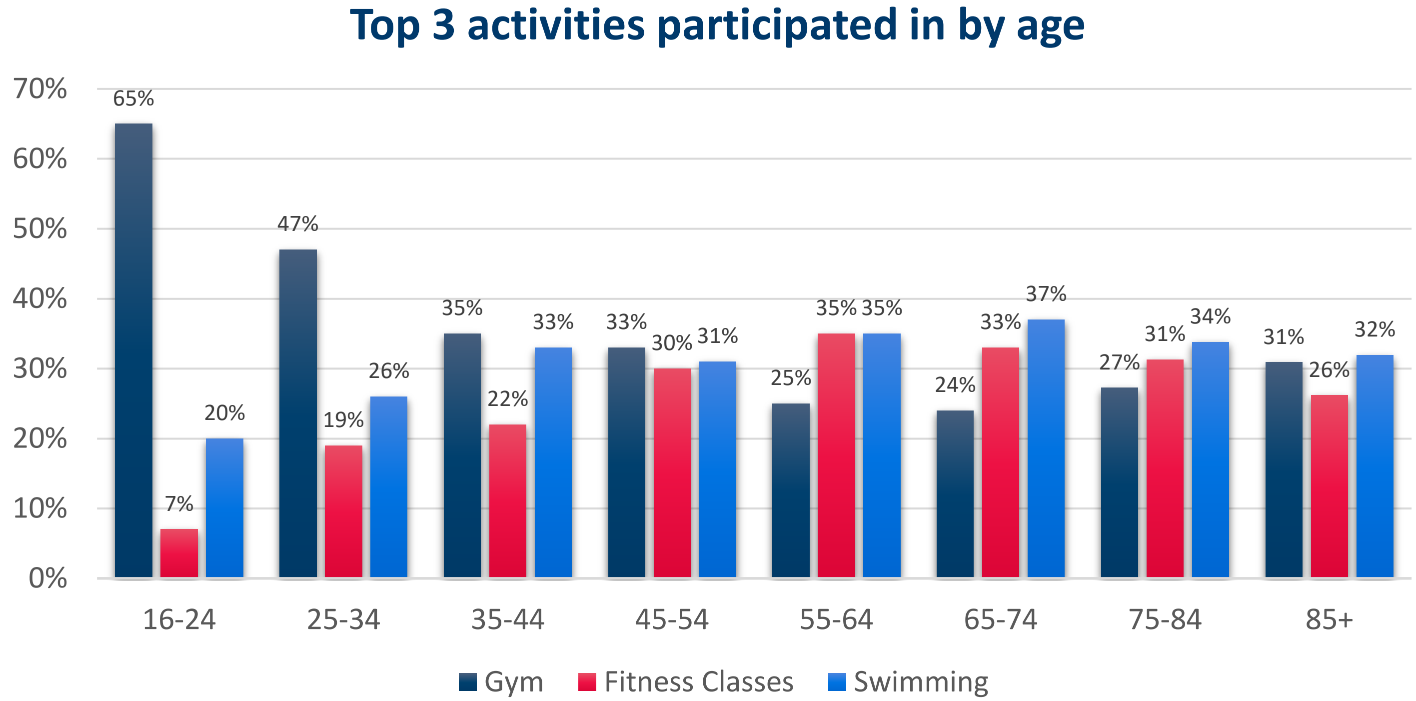



The "activity mix" of respondents has changed gradually over the last 4 years, with swimming decreasing and fitness and group exercise increasing, but swimming still represents the most quoted main activity. All other activities had less than a 3% response rate

# Top 3 Main activities participated in?
By Age



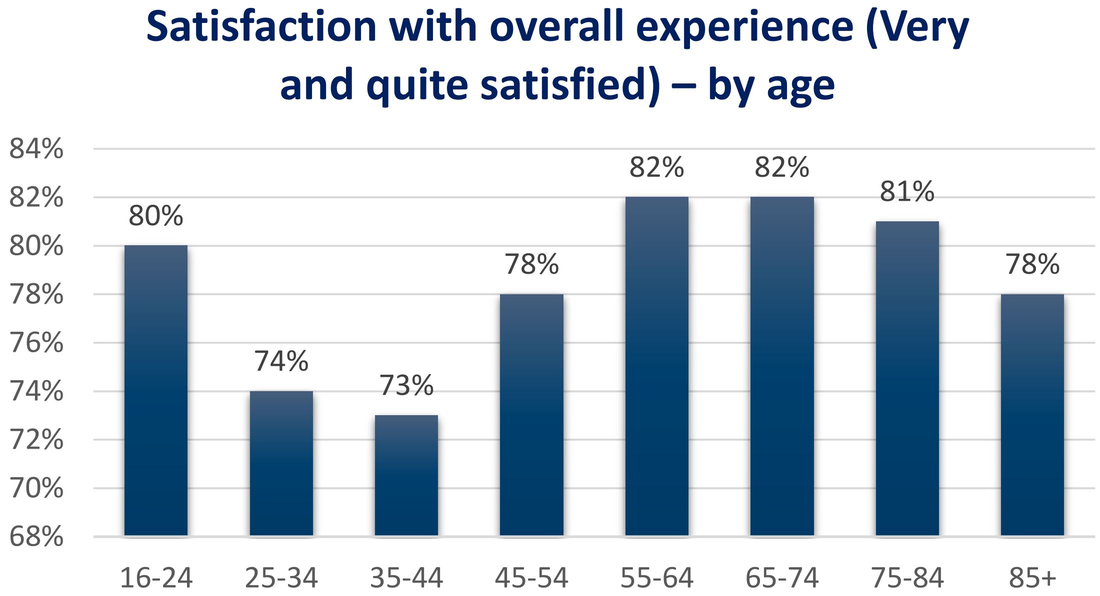

Gym usage is highest among younger adults, with 65% of 16–24-year-olds participating, but declines with age. Swimming and fitness classes see increased popularity among older age groups, with swimming peaking at 37% for those aged 65-74, and fitness classes gaining traction in adults aged 45 and above.

# 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

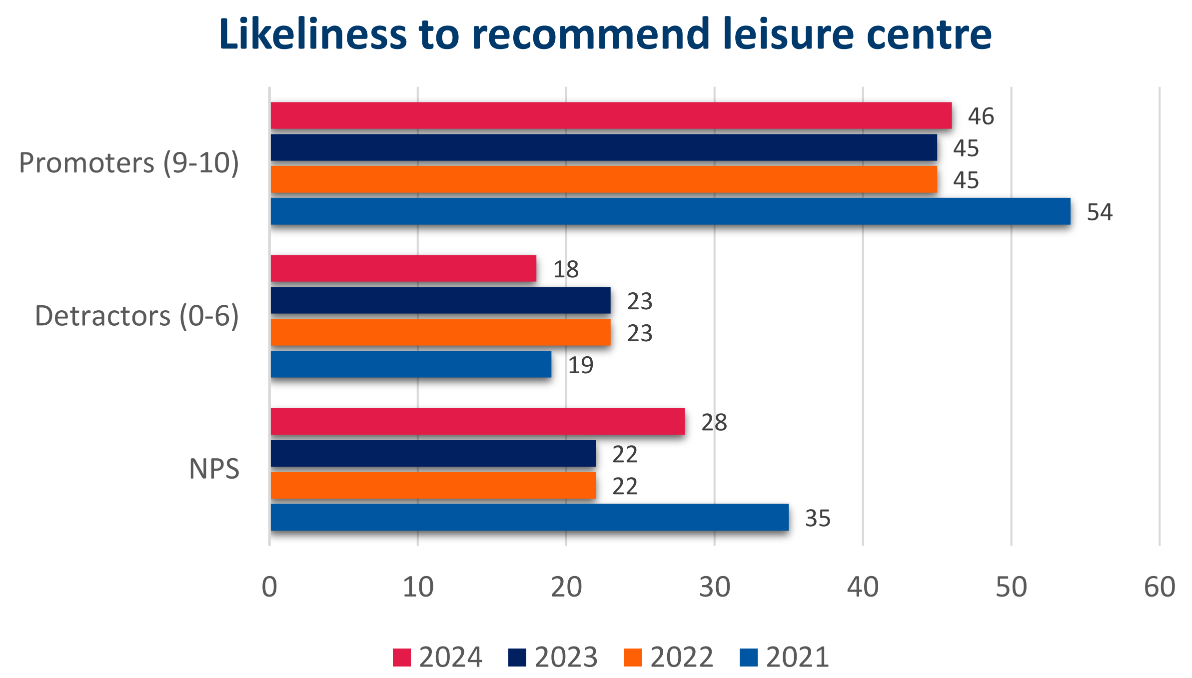
# Overall satisfaction levels – By age




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

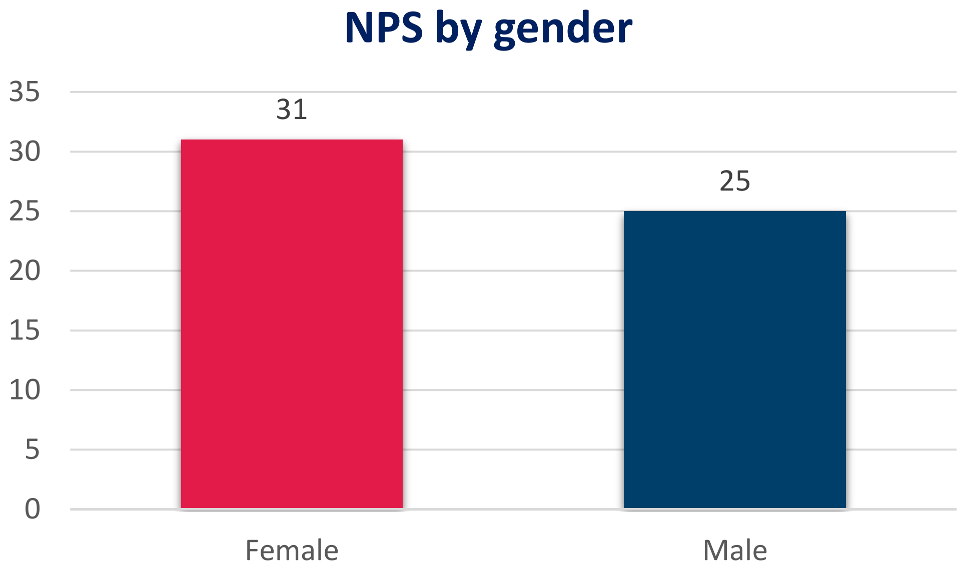
# How likely are you to recommend your centre based on your last visit on a scale of 0-10?

2024 vs 2023/2022/2021



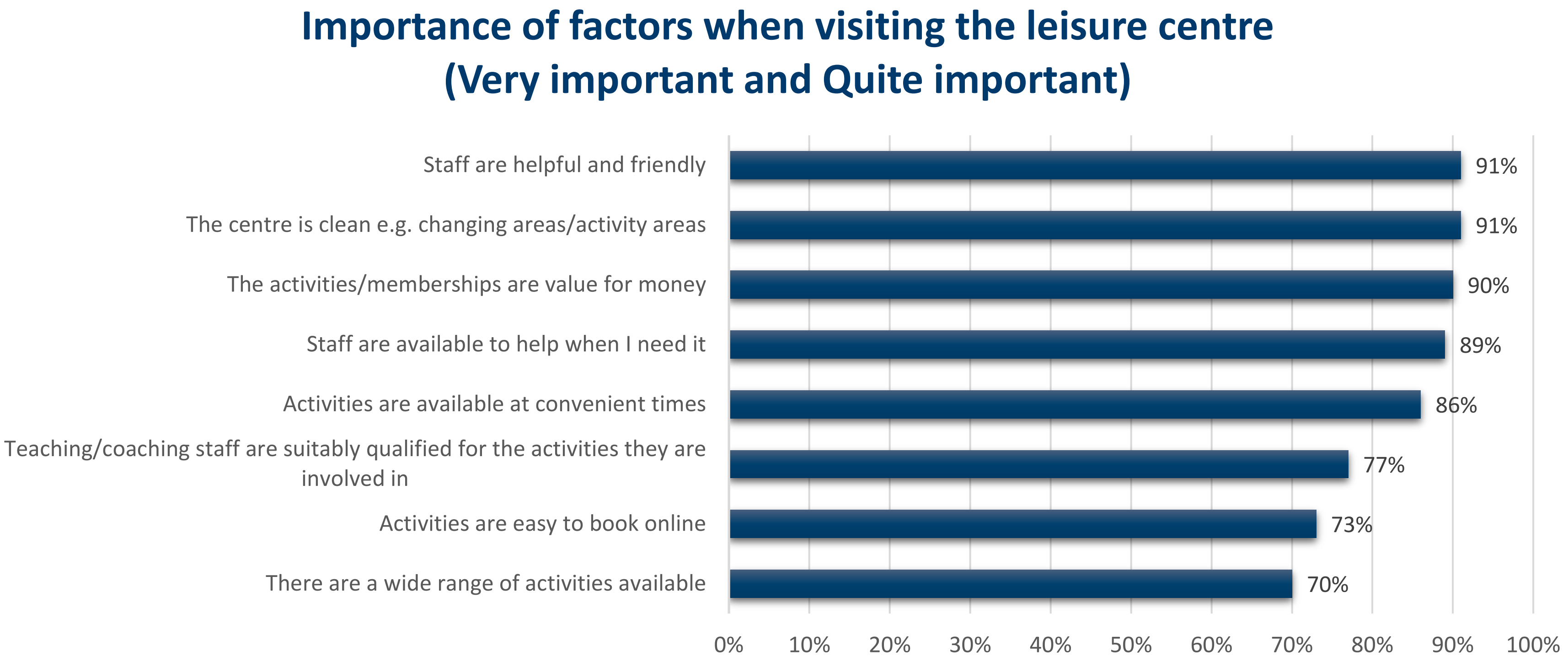

The overall NPS has increased by 6 since last year, now at 28, but still down since 2021 when it was at 35

# Net Promoter Score – by gender



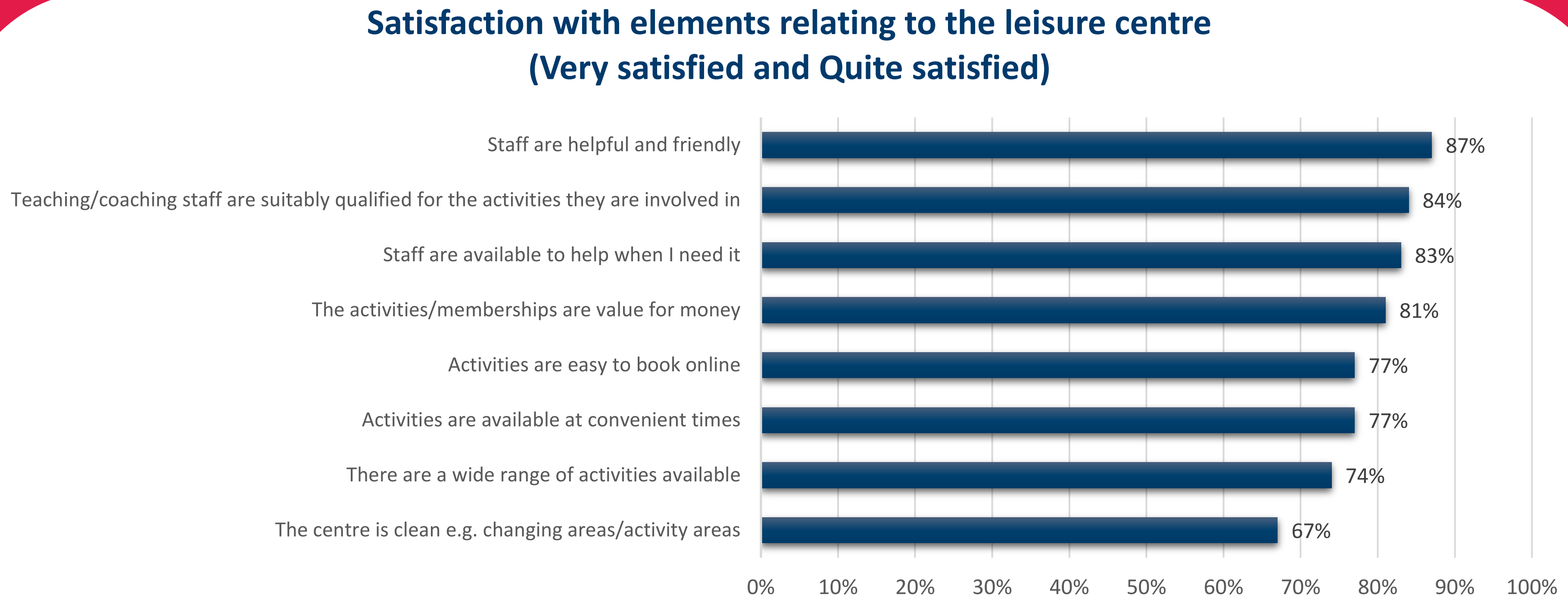

The female NPS is above the national average of 28, standing at 31, while males are below the national average at 25

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



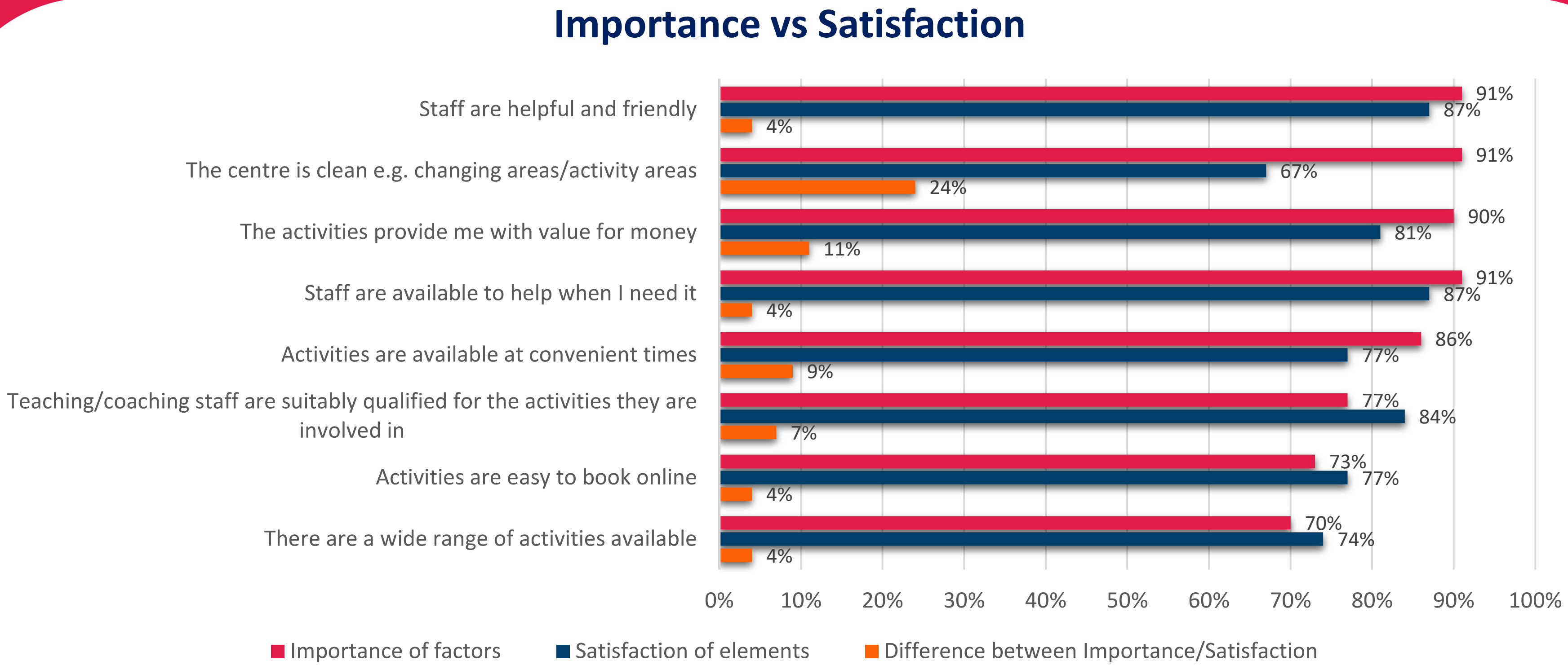

Staff being helpful/friendly, and cleanliness were the two most important factors to the sample when thinking about visiting a leisure centre and have been over the last 4 years. However, value for money has decreased from 98% in 2023 to 90% this year.

# 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

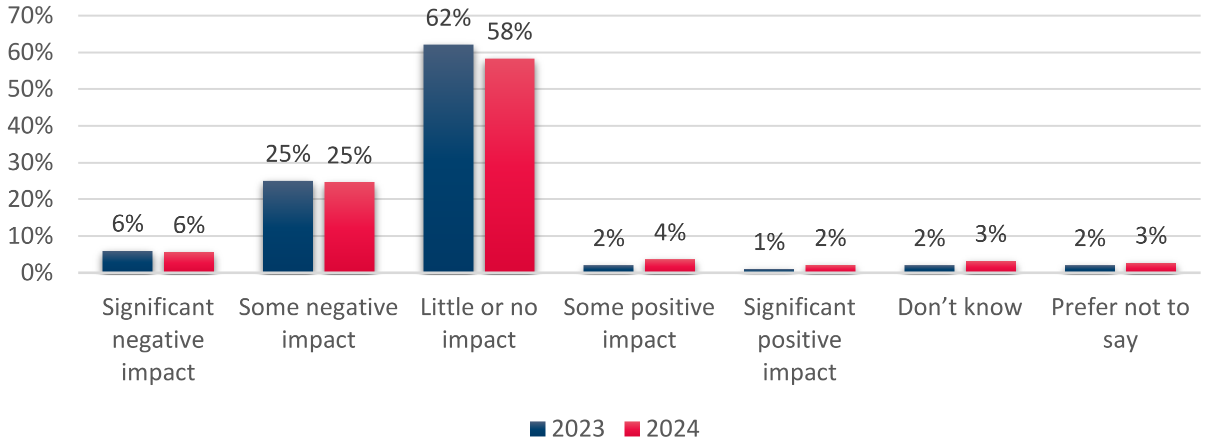
# Comparison Of Importance V Satisfaction Ratings




The main “gap” between Important and Satisfaction is in cleanliness, where there is a 24% gap between how important it is to customers and how well it is actually being delivered

# Cost-of-living impact
2023 vs 2024

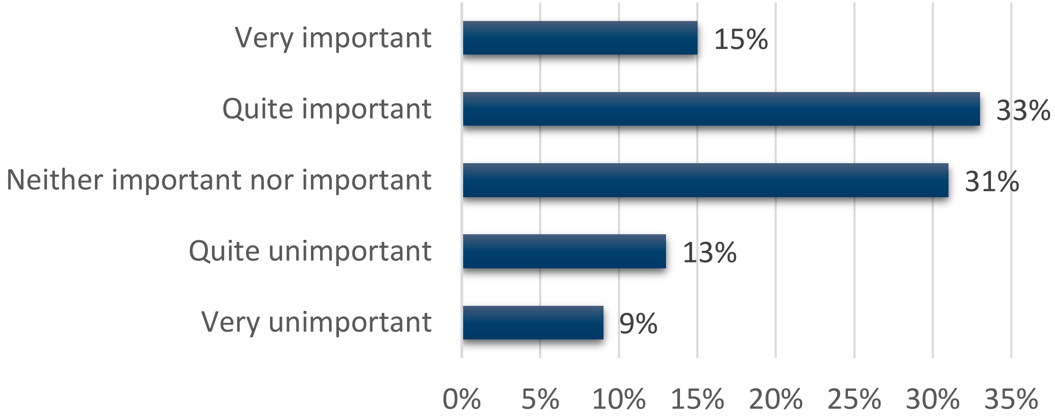
## What impact, if any, has the cost-of-living increase had on your use of sports, leisure and health/fitness facilities?




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

# Environmental Sustainability

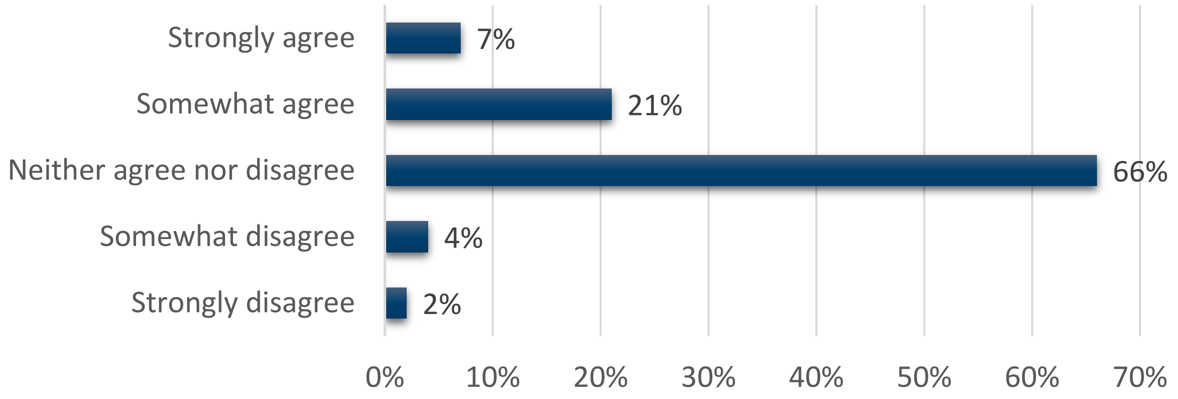
## Importance of environmental sustainability in your sport and physical activity choices?




33% considered environmental sustainability to be quite important, while 31% felt it was neither important nor unimportant

# Environmental Sustainability

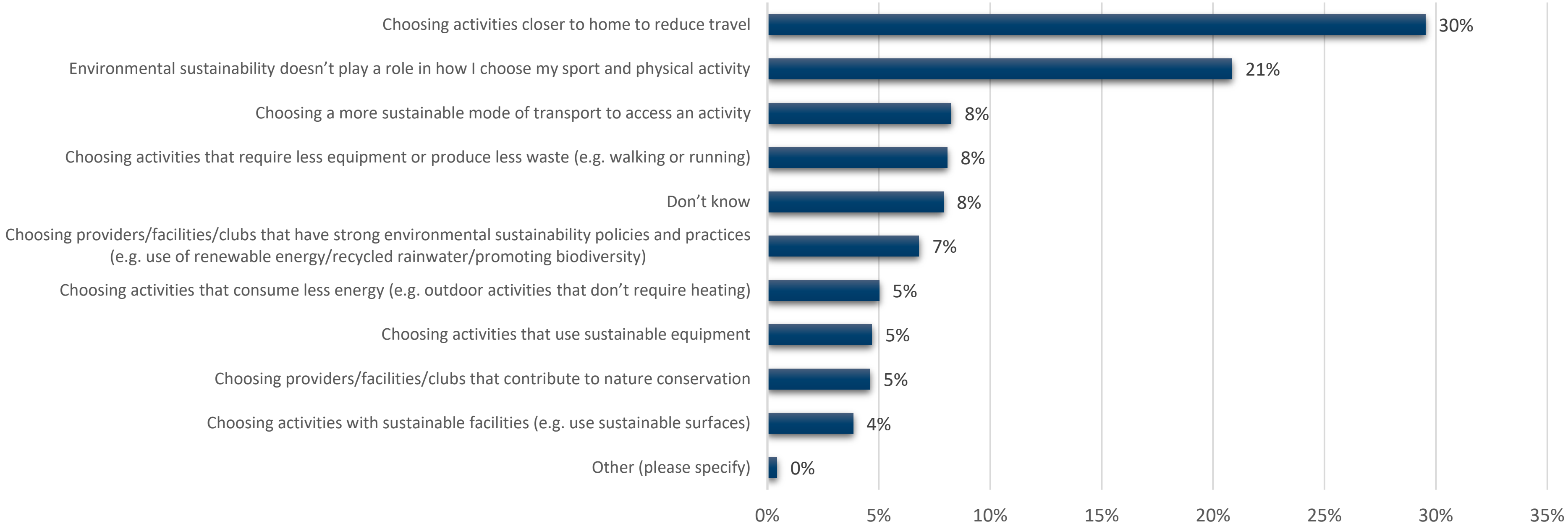
## To what extent do you agree or disagree that your leisure centre/provider is doing enough to adapt physical activity opportunities to be more environmentally sustainable?




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

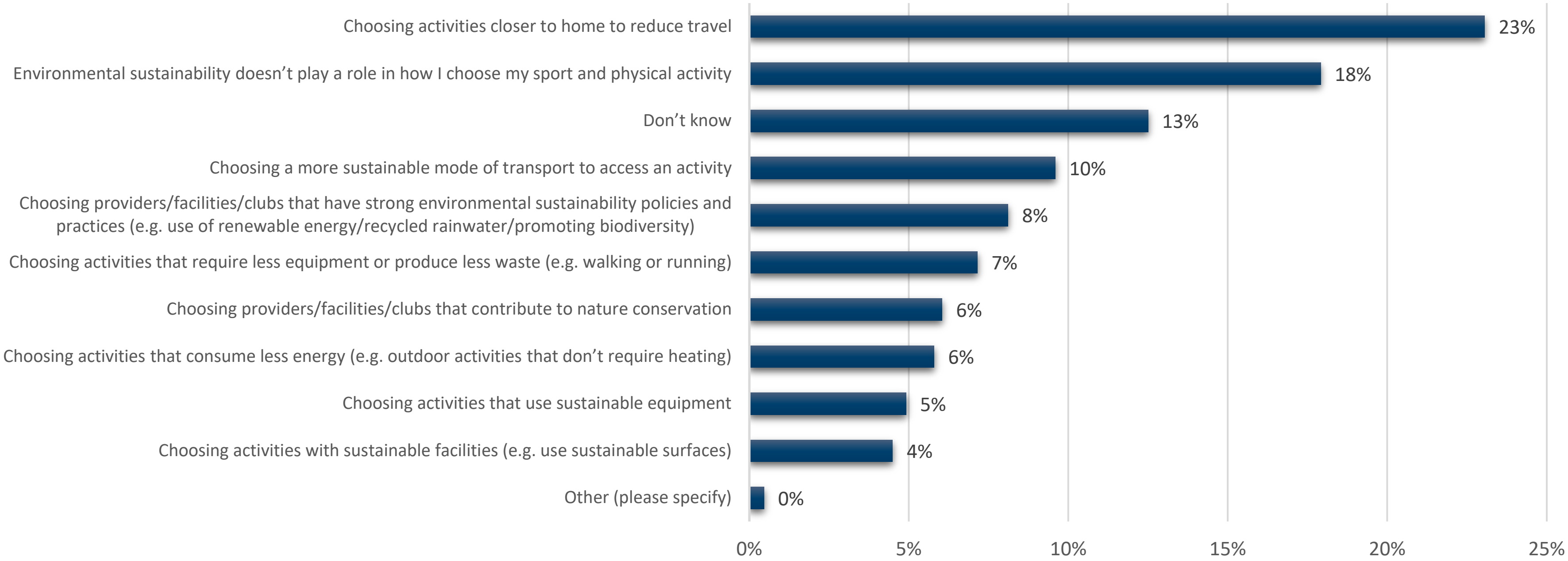
**In which of the following ways, if any, does environmental sustainability currently play a role in how you choose the sport and physical activity you take part in?**
**(Participants were asked to select all that apply)**




To support environmental sustainability, 30% of the total responses indicated participants would opt for activities closer to home to minimise travel when selecting sports and physical activities

# Environmental Sustainability

## 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

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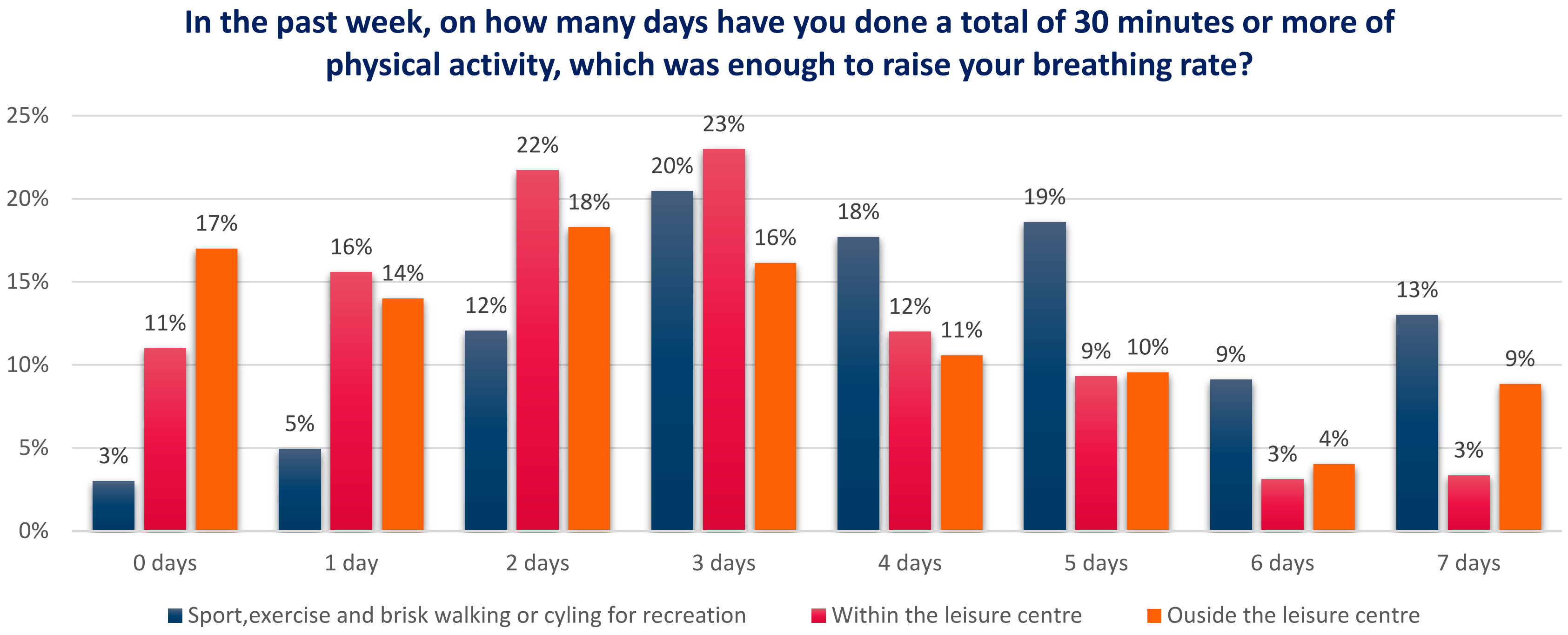


41% state that they do general sport, exercise and brisk walking or cycling for recreation at least 5 times a week compared to 23% when just considering outdoor exercise and 15% if just within a leisure centre

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

# Thank you