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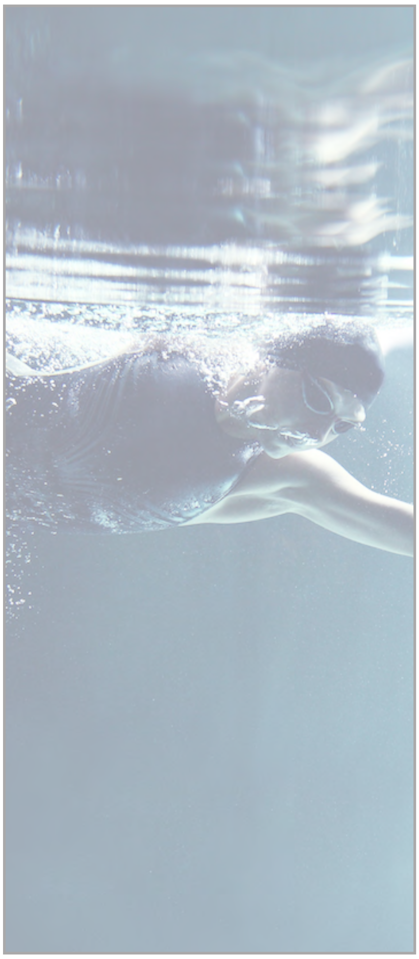
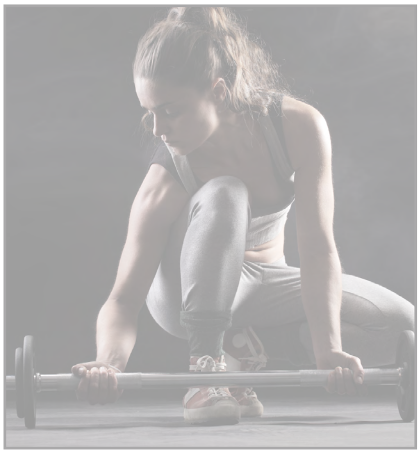
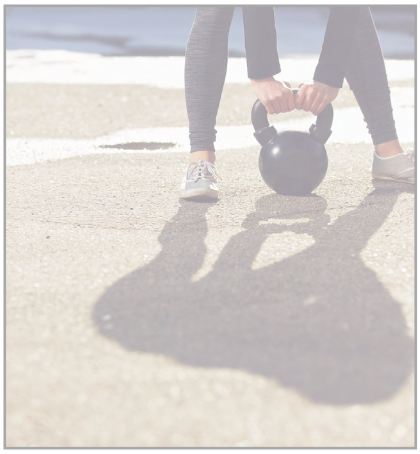






# Moving Communities:

## Active Leisure Trends
## 2017 Report

# Contents

# Introduction

## ukactive Research Institute

The ukactive Research Institute strives to build and develop an evidence base for the use of exercise and physical activity programmes in the improvement of quality of life, prevention, and management of disease. We aim to bridge the evidence gap between traditional laboratory based 'exercise is medicine' research and real world interventions. A key part of our work involves transforming data into meaningful and actionable insight. This enables us to make evidence based decisions to support our mission to get more people, more active, more often.

To ensure our sector remains strong and continues to thrive, we need to encourage an environment where businesses are confident in effectively utilising the data they have while exploiting new data opportunities. By using data to better understand customers, products and services businesses are able to make informed decisions that have the potential to transform their business, and as a result, the sector.

This report, created by ukactive Research Institute in collaboration with the DataHub, provides operators with insight into some of the key trends that have occurred in the sector over the past two years. Through this Research and Insight Partnership we have been able to access an unprecedented volume of sector aggregated data on usage and behaviours within the leisure industry. Taking advantage of data from over **3 million customers** and **130 million individual visits** we have been able to build a comprehensive picture of the leisure landscape within the country for the first time.

This includes an analysis of who is visiting facilites, when they are visiting and what they are doing, as well as an in depth look at certain demographic groups. The data is collected from leisure centre operators.

Through understanding this evolving landscape, and utilising market intelligence, operators should be able to respond more effectively to market movements and provide offers that appeal to the changing needs of consumers. We hope you find this report informative and we look forward to working with you to support the growth and continued vibrancy of the sector.

## DataHub

The solution to fundamentally addressing this wave of inactivity once and for all is very simple. Better, wider and more up to date visibility of what good looks like, what works and what doesn't. Available to every organisation, at the very point of decision.

The objective of the DataHub, and the primary reason for our involvement in developing the initiative and now managing it on behalf of a sector representative group, is to get a nation more active and healthy. This is done by sharing up to date intelligence and making better use of data that is already being collected by your facility systems. The DataHub now tracks over **300 million facility visits,** securely opening up this key intelligence to every organisation. So ultimately those investing and delivering within this sector, which includes every operator, can make more informed decisions. A more relevant offer that truly reflects sector trends as well as local community need will mean more customers knocking on the door of every gym and leisure centre in this country.

Intelligence-led decisions may range from what offer is most likely to appeal to different types of customers and therefore how to better programme a swimming pool or studio at peak or off peak time, right through to do I need a swimming pool in the first place. And what commercial returns, participation outcomes and social impacts should I expect to achieve through these areas of investment?

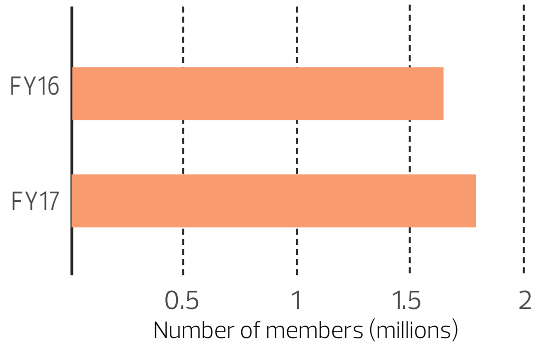
Powered by the DataHub, and on behalf of the DataHub Steering Group and Partners, we are delighted to present this report as a snapshot in time. Understanding the wider context should help every facility operator to assess whether they are fully exploiting the potential of their own assets and we look forward to supporting the sector to continue to collaborate more effectively going forward.

# Who?

Looking at data from over **3 million customer memberships** from the last two financial years we can identify the key demographics of the membership base of leisure centres and facilites. This will show what a typical member of a leisure facility looks like in 2017, and how this has changed over the past two years. For the purposes of analysis this section looks at membership figures from the last two financial years, FY16 and FY17. Data from **315 different sites** has been used, and only those users with a membership (rather than casual or pay as you go users) are included. The overall membership figures show that there was a 9% increase in total membership from FY16 to FY17, indicating an increasing desire to exercise and take part in fitness activites. Insuffcent data was available on the disability status of participants so this was unable to be included in this report.

**TOTAL MEMBERSHIP OF SAMPLE**

FY16 1,638,253 → +9% → FY17 1,785,854




## Age

Of the 3,376,842 membership records across the two financial years, over 99% have an age recorded against them. For the purposes of this report we have concentrated on adult memberships (16+). Any ages reported as over 110 years have been excluded. The two tables below show the percentage of adults (16+) that fall into each age band.

Table: Adult membership figures by age group

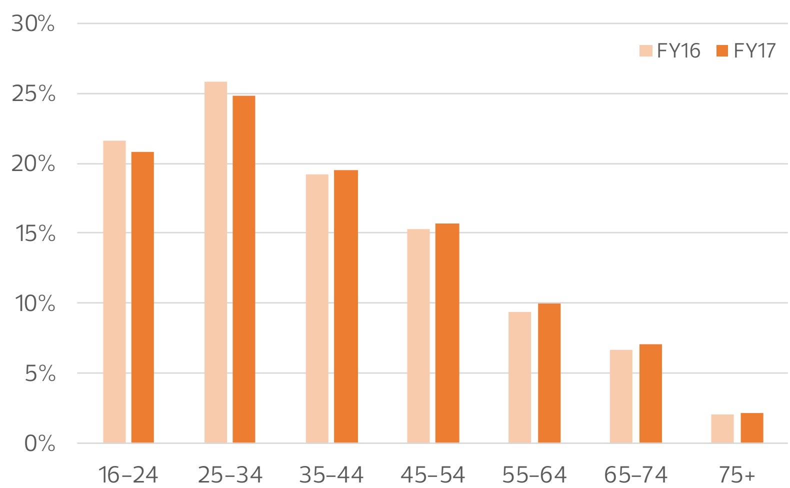
| | FY16 | FY17 |
|---|---|---|
| 16-24 | 280,046 | 289,736 |
| 25-34 | 335,384 | 345,587 |
| 35-44 | 249,311 | 270,839 |
| 45-54 | 198,191 | 218,421 |
| 55-64 | 121,228 | 138,198 |
| 65-74 | 87,223 | 98,389 |
| 75+ | 27,065 | 29,652 |

Table: Age groups as percentage of total adult membership

| | FY16 | FY17 | UK overall |
|---|---|---|---|
| 16-24 | 22% | 21% | 14% |
| 25-34 | 26% | 25% | 17% |
| 35-44 | 19% | 19% | 16% |
| 45-54 | 15% | 16% | 17% |
| 55-64 | 9% | 10% | 14% |
| 65-74 | 7% | 7% | 12% |
| 75+ | 2% | 2% | 10% |

The graph below shows the age distribution across both financial years, with little difference between the two. For both financial years the most populated age group was 25-34, followed by 16-24. These age groups account for nearly half of the entire membership base (46% in FY17). After the 25-34 age group there is a decrease in membership numbers at each subsequent age banding. This reduces to just 2% aged 75+. The 2016 ONS population reports 22% of the population being aged over 65. Just 9% of members were in this category, demonstrating a potentially huge segment of the population that are not currently engaging with sports and leisure facilities. This segment is only set to grow and this under represented group presents a big opportunity for leisure centres who are able to adapt and increase their provision for this demographic.

Graph: Adult membership figures by age group




**Mean Age**

FY16: 38 years 10 months

FY17: 39 years 4 months

**Modal Age**

FY16: 25 years

FY17: 26 years

## Gender

Of all the membership records across the two financial years, over 99% had gender data. This is a sample of over **3 million** (3,397, 197) across all 315 nationwide sites. The breakdown showed that for both years 52% of members were female. Later on in this report the type of activities that both males and females are doing is anaylsed to examine the difference in preferences between these two groups.

Table: Gender breakdown of membership

| | FY16 | FY17 |
|---|---|---|
| Male | 48% | 48% |
| Female | 52% | 52% |

## Gender-Age breakdown

Another useful thing to consider is if the age distribution differs between male and female. Looking at the data from FY17, it is clear that the male membership base is slightly younger than the female. 22% of males are in the youngest age group (16-24 years), compared to 20% of females. This trend then reverses at age 45-54, with a higher proportion of females in the next three age groups.

The mean age for females is consequently one year older, at 39 years 10 months against the male average of 38 years and 10 months. Later we will explore the difference in activity choice and visit timing between the different age and gender groups.

Graph: Gender and age breakdown of membership

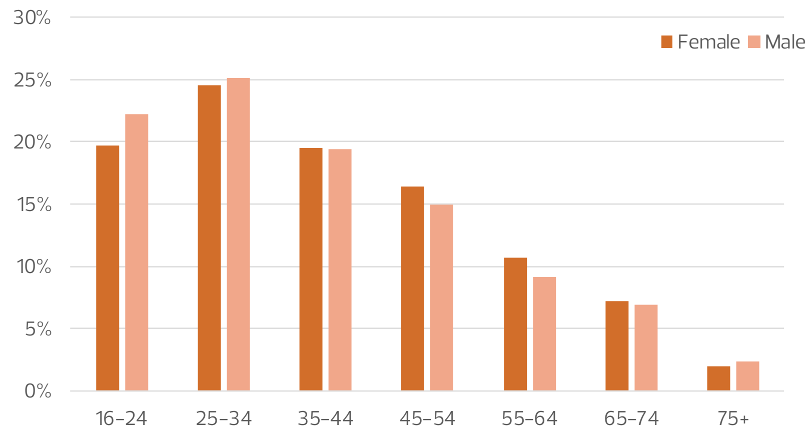



Table: Gender and age breakdown of membership

| | Female | Male |
|---|---|---|
| 16-24 | 20% | 22% |
| 25-34 | 25% | 25% |
| 35-44 | 19% | 19% |
| 45-54 | 16% | 15% |
| 55-64 | 11% | 9% |
| 65-74 | 7% | 7% |
| 75+ | 2% | 3% |

| Mean Age | |
|---|---|
| Female: 39 years 10 months | Male: 38 years 10 months |

| Modal Age | |
|---|---|
| Female: 25 years | Male: 25 years |

## Ethnicity

Across the same numbers of sites (315), there are more than **500,000 records** over both financial years with a recorded ethnicity against them. The following tables give the breakdown of ethnicities across both years.

Table: Ethnicity of membership

| | FY16 | FY17 |
|---|---|---|
| White | 189,086 | 223,862 |
| Asian | 31,854 | 39,290 |
| Black | 21,470 | 25,423 |
| Mixed | 9,923 | 12,216 |
| Other | 2,515 | 2,779 |

Table: Ethnicity of membership as a percentage of total membership

| | FY16 | FY17 | Nationwide* |
|---|---|---|---|
| White | 74% | 74% | 86% |
| Asian | 13% | 13% | 8% |
| Black | 8% | 8% | 3% |
| Mixed | 4% | 4% | 2% |
| Other | 1% | 1% | 1% |

*2011 Census

The distribution of ethnic groups has remained completley unchanged over the two years. The predominate group is White, which makes up 74% of the membership. This is substantially less than the general UK population, where 86% are White. This shows that sport and leisure facility users are a more ethnically diverse group than the population as a whole.

## Ethnicity by Gender

Looking at the breakdown of gender by ethnic group for FY17 there is only a very small differentiation between males and females. Asian males represented 14% of the entire male membership, whereas the female equivalent was slightly lower at 12%.

This was the only ethnic group where representation differed by more than a single percentage point.

Table: Ethnicity of membership by gender

| | Female | Male |
|---|---|---|
| White | 74% | 73% |
| Asian | 12% | 14% |
| Black | 9% | 8% |
| Mixed | 4% | 4% |
| Other | 1% | 1% |

## Social Deprivation

The postcode of over **2.5 million members** has been matched to an index of social deprivation. This is a government tool which measures the relative deprivation of a local area using the following factors:

- Income Deprivation
- Employment Deprivation
- Education, Skills and Training Deprivation
- Health Deprivation and Disability
- Crime
- Barriers to Housing and Services

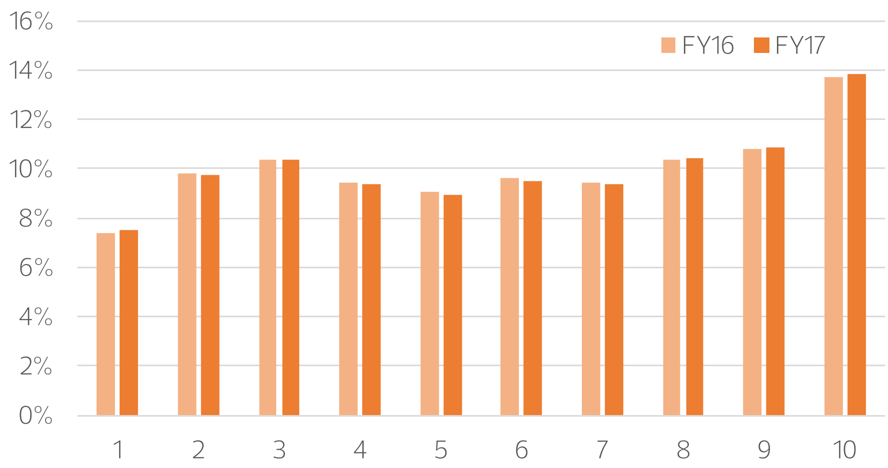
These factors are weighted for over 30,000 small areas in England. These areas can be ranked from 1 to 10, with 1 representing the 10% of areas that are most deprived and 10 representing the 10% of areas that are least deprived. The tables below show the percentage of members who fall within each of these ranks.

With no significant year on year change, the spread of members across the IMD rankings is skewed towards the higher end of the scale, illustrating that the population of leisure centre members is less deprived than the UK average. In both years, the highest percentage of members (14%) lived in areas which fell within the lowest 10% of deprivation. The lowest proportion of members came from the 10% most deprived areas, perhaps indicating that there are barriers in place that prevent residents of these areas accessing fitness and leisure facilities.

Table: Percentage of members in each decile of the Social Deprivation Index

| IMD | FY16 | FY17 |
|---|---|---|
| 1 | 7% | 8% |
| 2 | 10% | 10% |
| 3 | 10% | 10% |
| 4 | 9% | 9% |
| 5 | 9% | 9% |
| 6 | 10% | 10% |
| 7 | 10% | 9% |
| 8 | 10% | 10% |
| 9 | 11% | 11% |
| 10 | 14% | 14% |

Graph: Percentage of members in each decile of the Social Deprivation Index




### Key points

- » Total membership has increased by 9% from FY16 to FY17.
- » Nearly half of the adult membership base is aged between 16 and 34 (46% in FY17).
- » Over 65s are under represented, making up 9% of the membership base compared to 22% of the overall UK population.
- » 52% of members are females.
- » Mean age is 38 years 10 months for females and 39 years 4 months for males.
- » 74% of members are White, less than the UK population figure of 86%.
- » The highest percentage of members (14%) are in the least deprived 10% of the country.

# When?

The data set contains expansive information on when people are accessing leisure facilities. Using the data we can explore what day of the week or time of the day the peaks and troughs in visits to leisure centres occur. This can be used to identify the most popular times for certain activites, and used to plan classes and timetables more efficiently. Again, data from **315 sites** was used, totalling over **130 million visits** since 2015.

These visits are made up of two elements:

» Member visits, where operators would have some additional information on the participant such as age and gender

» Visits from pay as you go users, where only the activity they are doing is recorded.

## Day of the week

Since 2015 over **130 million visits** have been made to the 315 leisure centres included in this analysis. Each year, Tuesday has been the most popular day to visit, with an average of 16.4% of visits taking place on this day.

There are no dramatic changes or shifts in the days of the week people have been visiting over the last three years. Across all three years, the earlier days in the week show a higher rate of visits, before a drop off at the weekend.

Saturday was the worst attended day of the week since 2015. This clear decline at the weekend highlights an area where leisure centres could invest time in understanding why visit numbers decline when people should theoretically have the most free time.

Table: Visits on each day of the week

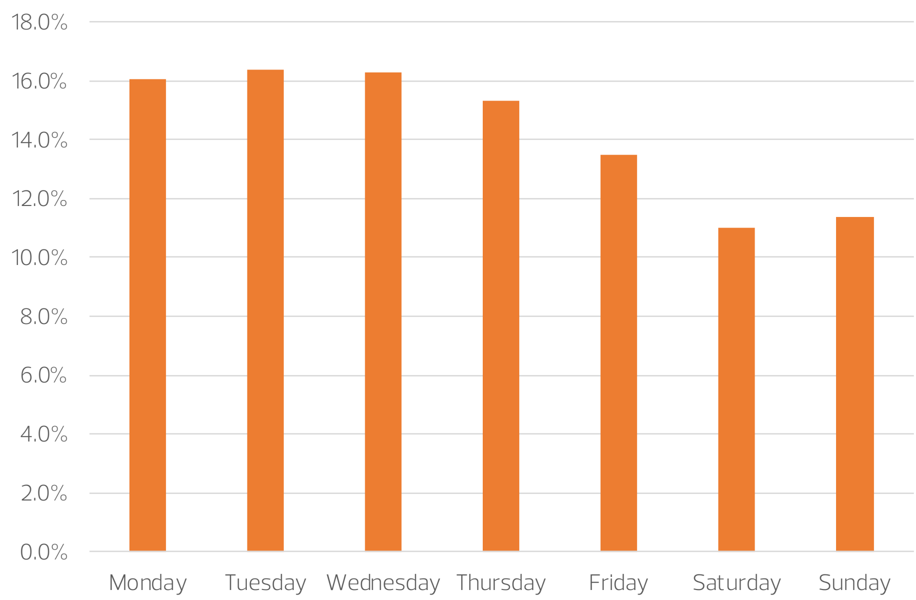
| Day | 2015 | 2016 | 2017 YTD |
|---|---|---|---|
| Monday | 8,598,747 | 9,971,794 | 3,346,639 |
| Tuesday | 8,755,476 | 10,091,211 | 3,490,764 |
| Wednesday | 8,597,311 | 10,232,055 | 3,405,708 |
| Thursday | 8,251,316 | 9,512,283 | 3,133,645 |
| Friday | 7,185,264 | 8,444,252 | 2,743,849 |
| Saturday | 5,603,669 | 7,073,460 | 2,337,882 |
| Sunday | 5,943,394 | 7,180,554 | 2,407,606 |
| Total | 52,935,177 | 62,505,609 | 20,866,093 |

Table: Visits on each day of the week as a percentage of overall visits

| Day | 2015 | 2016 | 2017 YTD | Overall |
|---|---|---|---|---|
| Monday | 16.3% | 16.0% | 16.1% | 16.1% |
| Tuesday | 16.5% | 16.1% | 16.7% | 16.4% |
| Wednesday | 16.2% | 16.4% | 16.3% | 16.3% |
| Thursday | 15.6% | 15.2% | 15.0% | 15.3% |
| Friday | 13.6% | 13.5% | 13.2% | 13.5% |
| Saturday | 10.6% | 11.3% | 11.2% | 11.0% |
| Sunday | 11.2% | 11.5% | 11.5% | 11.4% |
| Total | 100% | 100% | 100% | 100% |

The graph below shows the percentage of visits between 2015 and 2017 that took place on each day of the week, showing clearly the drop off at the weekend.

Graph: Percentage of visits on each day of the week



## Time of day

For some of the 315 sites data is available for the time of day that customers have visited. This can be useful information in detemining peak and off peak times and scheduling classes and staffing around the most popular times of day. For this analy-is only the hours of 5am- 11pm have been included, as midnight is often used as a default option. This leaves information from **85 million visits.**

Table: Visits on each hour of the day as percentage of overall visits

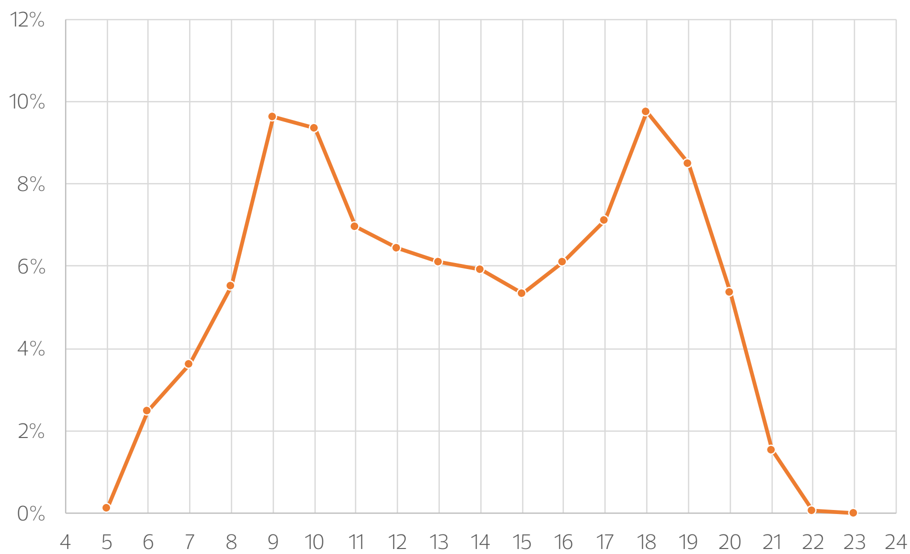
| Time | 2015 | 2016 | 2017 YTD | Total |
|---|---|---|---|---|
| 05 | 0% | 0% | 0% | 0% |
| 06 | 2% | 3% | 3% | 2% |
| 07 | 4% | 4% | 3% | 4% |
| 08 | 6% | 5% | 6% | 6% |
| 09 | 10% | 10% | 10% | 10% |
| 10 | 9% | 9% | 10% | 9% |
| 11 | 7% | 7% | 7% | 7% |
| 12 | 6% | 6% | 7% | 6% |
| 13 | 6% | 6% | 6% | 6% |
| 14 | 6% | 6% | 6% | 6% |
| 15 | 5% | 5% | 5% | 5% |
| 16 | 6% | 6% | 6% | 6% |
| 17 | 7% | 7% | 7% | 7% |
| 18 | 10% | 10% | 10% | 10% |
| 19 | 9% | 9% | 8% | 9% |
| 20 | 5% | 5% | 5% | 5% |
| 21 | 2% | 2% | 1% | 2% |
| 22 | 0% | 0% | 0% | 0% |
| 23 | 0% | 0% | 0% | 0% |
| Total | 100% | 100% | 100% | 100% |

Table: Visits in each time band as percentage of overall visits

| Time | Total |
|---|---|
| Early morning (pre 9am) | 12% |
| Late Morning (9am-12pm) | 26% |
| Early Afternoon (12pm-3pm) | 18% |
| Late Afternoon (3pm-6pm) | 18% |
| Early Evening (6pm-8pm) | 24% |
| Late Evening (9pm onwards) | 2% |

- As with previous metrics, there is no great differential over the last three years. The data shows two uplifts in visit times throughout the day- one at 9am and a second at 6pm.
- The evening peak can be attributed to a post work rush.
- The morning peak is more interesting and more likely to be impacted by a number of factors. The visitors at this time may be unemployed, self employed with more time flexibilty, working from home or visiting after the school run.
- Visits start to tail off after 8pm, with a huge reduction in the later slot of 10pm-11pm. This will also be impacted by not all leisure centres offering 24 hour opening or late closing times.

Graph: Percentage of visits on each hour of the day



## Variations throughout the week: weekends and weekdays

Putting together the 2017 YTD data for day of week and time of day, some distinct differentials between weekdays and weekends appear. This type of information is important for scheduling, staffing and resource allocation.

» At weekends, visits in the early evening (from 6pm onwards) virtually disappear.

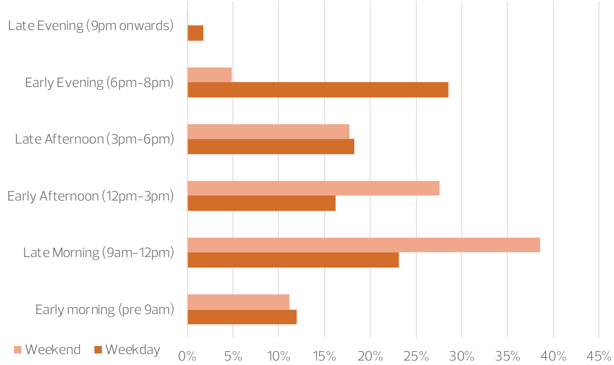
» Visits in the 6–9pm slot fall from a figure of 29% of all visits across weekdays to 5% of all visits at weekends.

» They are instead replaced by visits between 9 and 3pm, with both the 9am–12pm and 12pm–3pm slots significantly more popular than during the week.

Table: Weekend and weekday visits by time slot

| | Weekday | Weekend |
|---|---|---|
| Early morning (pre 9am) | 12% | 11% |
| Late Morning (9am–12pm) | 23% | 39% |
| Early Afternoon (12pm–3pm) | 16% | 27% |
| Late Afternoon (3pm–6pm) | 18% | 18% |
| Early Evening (6pm–8pm) | 29% | 5% |
| Late Evening (9pm onwards) | 2% | 0% |

Graph: Weekend and weekday visits by time slot




## Variations throughout the week: Weekday variation

There is also a noticeable difference in visit times on a Friday compared to any other weekday.

» On Fridays there is an increase in visits in the late morning slot, with this totalling 27% of daily visits compared to a maximum of 24% during the rest of the week.

» In contrast, visits in the early and late evening fall, with early evening visits making up 21% of the daily total compared to 29–31% during the rest of the week.

Graph: Weekday visits by time slot

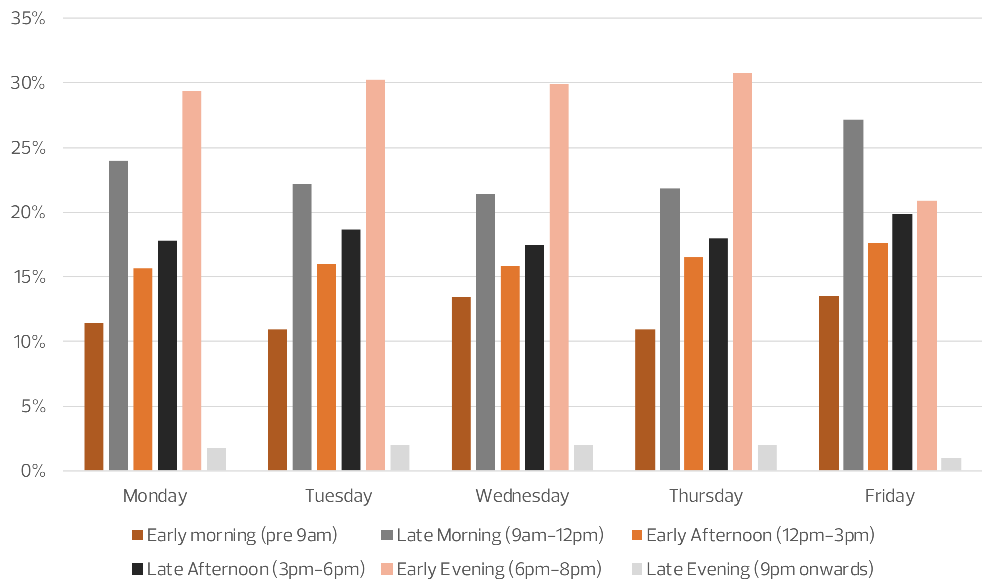



Table: Weekday visits by time slot

| | Monday | Tuesday | Wednesday | Thursday | Friday |
|---|---|---|---|---|---|
| Early morning (pre 9am) | 11% | 11% | 13% | 11% | 13% |
| Late Morning (9am–12pm) | 24% | 22% | 21% | 22% | 27% |
| Early Afternoon (12pm–3pm) | 16% | 16% | 16% | 16% | 18% |
| Late Afternoon (3pm–6pm) | 18% | 19% | 18% | 18% | 20% |
| Early Evening (6pm–8pm) | 29% | 30% | 30% | 31% | 21% |
| Late Evening (9pm onwards) | 2% | 2% | 2% | 2% | 1% |

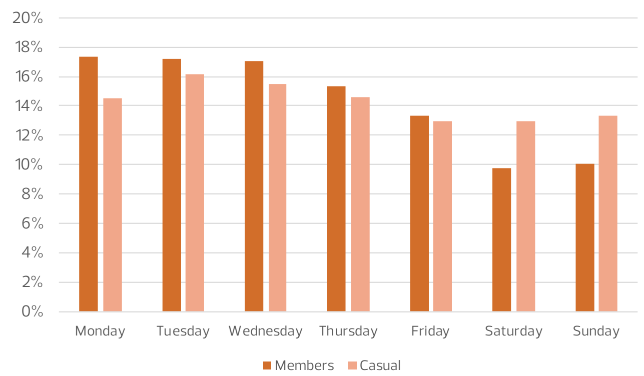
## Difference between member visits and casual visits

### Casual vs member

Throughout the report the difference in membership behaviour is compared between those who have ongoing memberships to facilities and those who attend on a casual or pay as you go basis. For the purposes of the report, a pay as you go member is taken to be someone for who there is no additional background information available, and only the purpose of the visit is recorded. Members have been assumed to be those who have demographic information stored against their record, as would be expected for those signing up to a financial contract.

Looking at this data there is one striking difference in the days of the week when most visits take place. Whilst weekday visits differ by one or two percent between the two groups, weekend visits make up 26% of total visits for casual users and 20% for members. There are also some noticeable differences in the timing of visits. The most popular time slot for both categories is late morning (9am-12pm), but casual users are more likely to visit in the early afternoon slot and less likely to visit early morning.

Graph: Percentage of visits on each day split by visit type




Graph: Time of visits split by member type

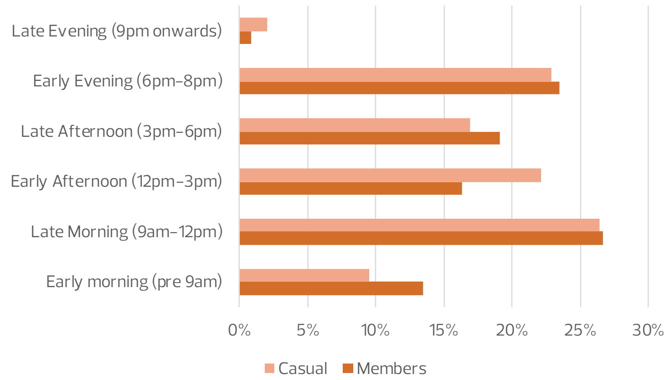



Table: Percentage of visits on each day split by visit type

| | Members | Casual |
|---|---|---|
| Monday | 17% | 15% |
| Tuesday | 17% | 16% |
| Wednesday | 17% | 15% |
| Thursday | 16% | 15% |
| Friday | 13% | 13% |
| Saturday | 10% | 13% |
| Sunday | 10% | 13% |

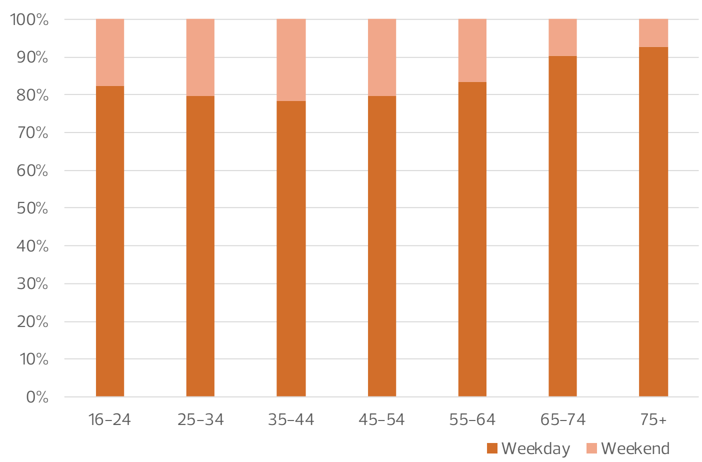
Table: Time of visits split by member type

| Time | Members | Casual |
|---|---|---|
| Early morning (pre 9am) | 13% | 10% |
| Late Morning (9am-12pm) | 27% | 26% |
| Early Afternoon (12pm-3pm) | 16% | 22% |
| Late Afternoon (3pm-6pm) | 19% | 17% |
| Early Evening (6pm-8pm) | 24% | 23% |
| Late Evening (9pm onwards) | 1% | 2% |

## Difference between ages

Looking further in depth at the data we can see that there is a distinct difference in usage between the age groups, with younger age groups having a higher percentage of their visits during the weekend than older age groups. This data only includes members, as age data is not collected when casual users visit facilities. Only 7% of visits from the 75+ age group occur at the weekend, compared to 22% for the 35-44 year age group.

Graph: Proportion of weekday and weekend visits by age group

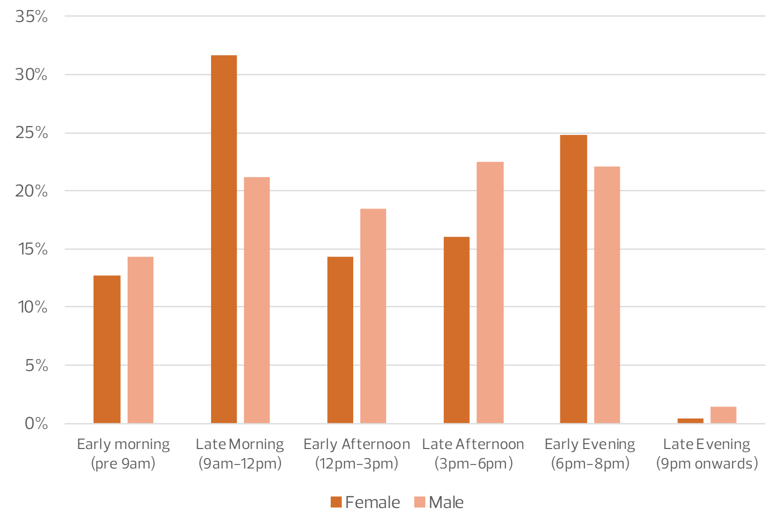


## Difference between genders

The data reveals some interesting trends in visit behaviour between different groups of people based on gender. Visit data can be split by male members and female members.

There is a clear spike in visit numbers for females in the late morning slot (9am-12pm). Visits by males are spread more evenly throughout the day, with the later time slots of 3pm-6pm and 6pm-9pm proving the most popular.

Graph: Time of visit by gender




## Key points

- » Tuesday is the most popular day for visiting, with 16% of visits on this day over the last three years.
- » Saturday is the least popular day for visiting, with 11% of visits on this day over the last three years.
- » There are two clear peaks in visits during the day, one at 9am and one at 6pm.
- » Visits in the morning are more popular during the weekend.
- » Evening visits are more popular on weekdays.
- » Casual visitors have a higher percentage of their visits at the weekend compared to members.
- » Older age groups have a higher proportion of weekday visits.
- » A much higher percentage of female visits occur during late morning compared to male visits.

# What?

Using data combined from all 315 sites, there is an unprecedented volume of visit activity we can access. In total over **130 million activites** have been recorded, putting us in a unique position to see what activites the active population are choosing to take part in. 19 million of these activites are classified as 'other', meaning they are not part of the core range of sports and leisure activites offered but are an extra activity- this includes drama, art and spectator visits. These have been excluded from the analysis, leaving a total of over **110 million recorded visits**.

Again, data from both members and casual users (identified by having no demographic data) is included. The data is categorised at different levels. There is a broad grouping and a more specific activity, so for example it is possible to see how many people are taking part in Group Workouts in general, before this is broken down into specific activites e.g. Cardio, Yoga or Body Balance.

## Overall visits

Looking at the number of overall visits to facilites, there was a big increase of 17% from 2015 to 2016 across the 315 sites. In 2017, 17,541,369 visits had been made up to the end of April so early indications suggest this could reach a similar level to 2016.

| 2015 | | 2016 |
|---|---|---|
| 45,177,975 | +17% → | 52,755,678 |

### Core three activities and sports

This uplift is reflected in an increase in the number of visits for most activites. The table below shows the top three activities by visit, and the change over the two years. Three activites dominate the data set- swimming, group workout and fitness- which make up over 80% of the total visits across the three years. In this data set 'fitness' refers to a visit to use the gym facilites. This does not include fitness classes which are counted within the group workout category. These will be referred to as the 'core activites'. Looking at these three activites, the biggest change was in swimming, which saw an increase in participation of 16%. The remainder of the visits data will be classified as sports for the remainder of the report.

Table: Change in visits for three core activites

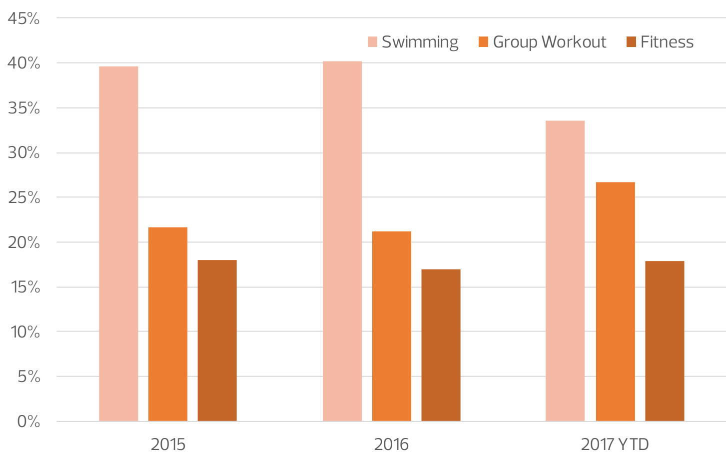
| Activity | 2015 | 2016 | Change |
|---|---|---|---|
| Swimming | 18,105,966 | 21,543,577 | +16% |
| Group Workout | 9,881,286 | 11,368,363 | +13% |
| Fitness | 8,250,900 | 9,122,322 | +10% |

## Why are people visiting leisure facilities?

The initial breakdown of data shows the primary activity that is recorded when visiting a facility, before this is broken down further into more specific sub sets of that activity. To include the 2017 data in the analysis we have looked at visits for activites as a percentage of total visits. Over the last three years swimming, group workouts and fitness (gym visits) have been by far the most frequent reasons for visiting, ahead of group sport activites like football or badminton. Before 2017, 40% of visits to leisure centres were for swimming. In 2017 (YTD) this dropped to 35%, perhaps representing the expanding product portfolio that is now on offer and the increased popularity of group workouts. These three activites form the 'core activites' offered by leisure facilites.

| CORE ACTIVITIES | 2015 | 2016 | 2017 |
|---|---|---|---|
| 1. Swimming | 40% | 41% | 35% |
| 2. Group Workouts | 22% | 22% | 28% |
| 3. Fitness | 18% | 17% | 19% |

Graph: Percentage of visits to take part in core three activites

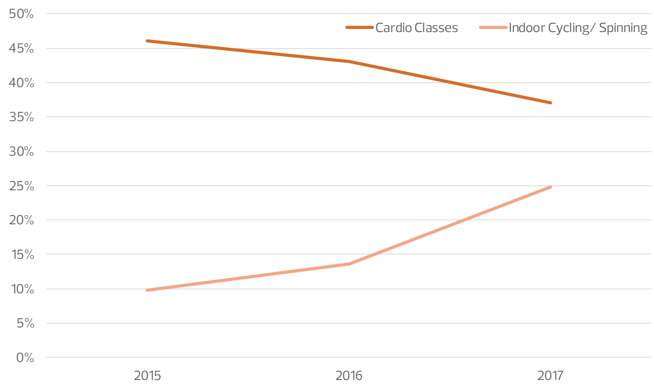


## What workouts are people doing?

There is a plethora of different classes within the 'Group Workouts' category, with something suited to all exercisers. Looking just at visits within this category, two types of class dominate, with cardio classes the most popular, followed by indoor cycling or spinning. These two activites combined make up over 50% of total group workout visits. The change in preference over the last three years is evident here, with the cardio classes percentage falling as the indoor cycling does the opposite. From 2016 to 2017 (YTD) there was a 79% increase in the proportion of recorded visits for indoor cycling classes.

| | 2015 | 2016 | 2017 |
|---|---|---|---|
| 1. Cardio classes | 46% | 43% | 37% |
| 2. Indoor cycling/ Spinning | 10% | 14% | 25% |

Graph: Top two group workout activites by year




The remaining group workout visits are split between a wide range of activites. So far in 2017, Pilates, Body Pump and Yoga make up the rest of the top 5 most popular activites.

Although they represent small proportions of total classes, three activites have seen growth of more than 50% since 2015: Grit, HIIT and Pump FX.

## What sports are people playing?

Taking sports be to anything outside the core three activities we can see that the percentage of visits to play a sport, was 19% in 2017 and 20% in 2015 and 2016.

| | 2015 | 2016 | 2017 |
|---|---|---|---|
| Sports | 20% | 20% | 19% |

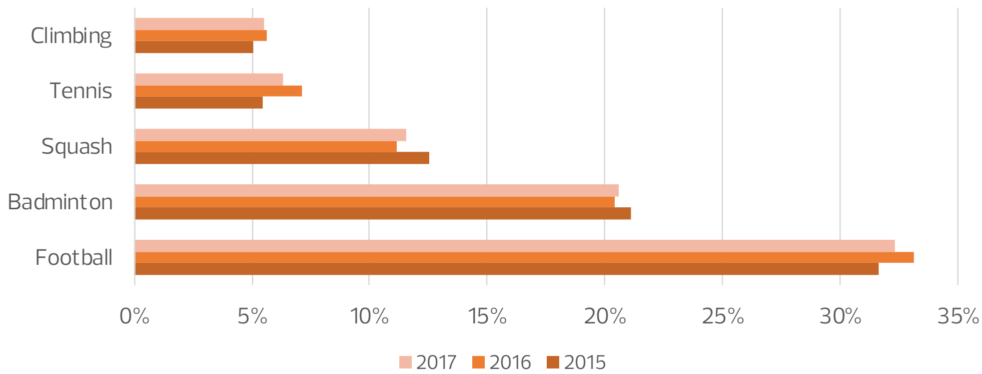
A huge variety of over 40 different sports make up this segment. The composition and order of the most popular five sports has remained unchanged over the last three years, with only minimal changes in the percentage of visits dedicated to each.

Looking at this sports based segment only, football is the most frequently played sport, with one in three sport based visits being to play this. This includes all forms of the sport including 5 a side, outdoor and walking.This was followed by badminton, squash, tennis and climbing. The table below shows visits for the top five sports as a percentage of sport visits overall.

Table: Most frequently played sports as a percentage of sport visits

| Day | 2015 | 2016 | 2017 |
|---|---|---|---|
| Football | 32% | 33% | 32% |
| Badminton | 21% | 20% | 21% |
| Squash | 13% | 11% | 12% |
| Tennis | 5% | 7% | 6% |
| Climbing | 5% | 6% | 6% |

Graph: Most frequently played sports as a percentage of sport visits



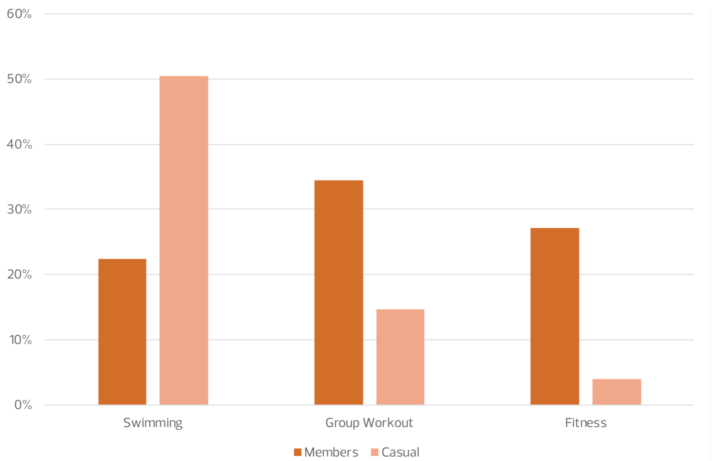
## How does behaviour differ between members and casual visitors?

Looking at the visits data, it can be split between visits made by members (for which there is gender and age information avaliable), and visits made by casual or pay as you go members. So far in 2017 40% of visits have been from casual users.

- The two groups have very different exercise habits, with half of casual visits being for swimming, compared to less than a quarter for members.
- This is a clear signal that swimming is a popular activity for people who do not have leisure centre or gym memberships.
- Fitness visits for casual users (visiting the gym) are also far lower than those of members, with 4% of visits being for this purpose compared to 27%.

| CORE ACTIVITIES | Member | Casual |
|---|---|---|
| 1. Swimming | 22% | 50% |
| 2. Group Workouts | 35% | 15% |
| 3. Fitness | 27% | 4% |

Graph: Percentage of visits for core three activities split by casuals and members




Casual users are more likely to be playing a specific sport, with 31% of visits to centres being for a sport based activity. Members are less likely to visit for sport based activity, with a total of 16% of visits being to play a sport outside the core three activities.

The specific sports that members and non members play also differs, with football by far the most popular for non members. This makes up nearly half of sport related visits for non members. For members, badminton is the most popular, with this making up 32% of visits. Football and squash both make up over 10% of visits for members.

There are a few sports that are far more frequently played by casual users than members- aside from football these include trampolining, bowls and climbing.

Table: Sport visits split by member type

| Sport | Members | Casuals |
|---|---|---|
| Badminton | 32% | 9% |
| Football | 12% | 43% |
| Squash | 16% | 4% |
| Tennis | 9% | 2% |
| Trampolining | 3% | 6% |
| Bowls | 0% | 6% |
| Climbing | 2% | 7% |

### Key points

- The number of visits across the 315 sites increased by 17% from 2015 to 2016.
- Over 80% of visits are for the core three activites of swimming, group exercise or fitness.
- In 2017, 35% of visits have been for swimming, a decrease on previous years.
- Cardio classes are the most popular type of group workout, although their popularity is declining as indoor cycling becomes more popular.
- Football is the most popular sport to play, followed by badminton.
- Casual visitors predominately visit to swim, with very few using the gym.
- As a percentage of total visits, football is played more frequently by casual users than members.

# How?

The final part of the report looks at the difference in fitness behaviours between different age groups and genders. By segmenting the data on activities and sports, we can take an in depth look at what specific demographic groups are doing and how this may affect planning for the future.

## An analysis by gender: Core activities

This analysis looks at visits by members only– gender breakdown is not available for non member visits. First we can look at the percentage of visits for each of the core activities as a percentage of total visits.

- The most noticeable is that nearly half of female visits are to attend a group fitness class, with this same category making up around a quarter of visits by males.
- On the contrary, visits to use the gym (fitness) are more popular amongst males, with 34% of visits for this purpose compared to 20% for females.
- Swimming is fairly similar for both, with this making up 24% of female visits and 21% of male.
- Sport visits aside from the three core activites make up 13% of visits for females and 19% of visits for males.

Graph: Percentage of visits for core activities split by gender

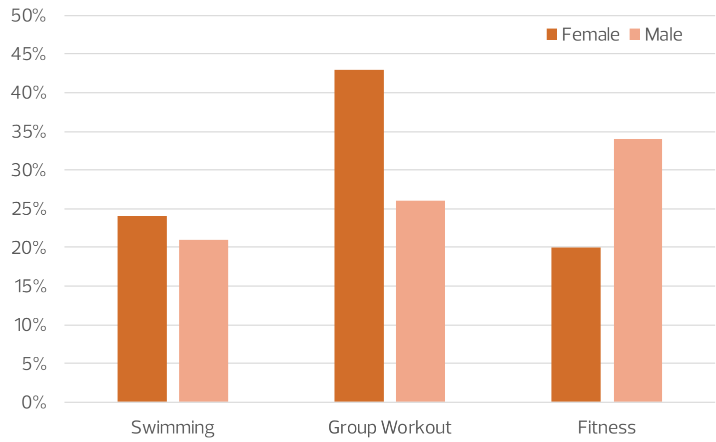
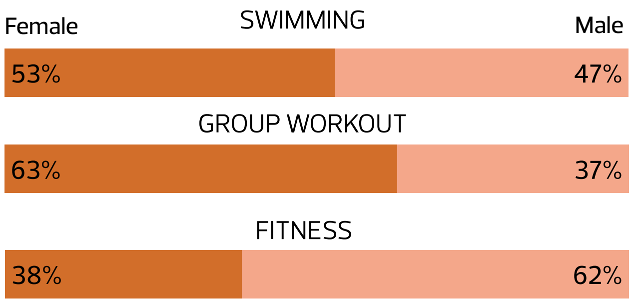



Table: Core activites by gender as percentage of visits

| Activity | Female | Male |
|---|---|---|
| Swimming | 24% | 21% |
| Group Workout | 43% | 26% |
| Fitness | 20% | 34% |

- A second way to look at the data is to take the three core activities individually and look at what percentage of the total visits for that sport were by males and females.
- The results for this mirror the findings from the analysis above.
- Swimming gets slightly more visits from females than males (53% against 47%).
- Group workouts get substantially more visits from females, in contrast to fitness where the trend is reversed.

Graph: Percentage of core activity visits by gender




## An analysis by gender: Sports

- We have seen that 13% of visits by females are for sports, compared to 19% of visits by males.
- There are also differences in the types of sports chosen by female and male members.
- Looking at data just on sport visits the table shows the percentage of visits for each sport as a percentage of total sport visits.
- We can see that badminton and squash are the two most popular sports for both genders, although in differing proportions.
- For males, football also features highly, making up nearly one in five visits.
- Female visits are spread across a wider variety of activites, with trampolining, tennis and dance all featuring high up the list.

Table: Sport activites by gender as percentage of sport visits

| Sport | Female | Male |
|---|---|---|
| Badminton | 36% | 31% |
| Football | 5% | 18% |
| Squash | 12% | 21% |
| Tennis | 10% | 10% |
| Dance | 6% | 0% |
| Trampolining | 4% | 1% |
| Climbing | 5% | 4% |

## An analysis by age

Looking at the same set of data (visits by members) it is also possible to examine the behaviours of different age groups. The graph below shows the percentage of total visits for each of the age groups for swimming, group workout and fitness. There are some clear trends, particuarly in swimming, where the popularity increases rapidly with age, from 7% of visits for the 16-24 age group to 38% for the 75+. This is a clear indication of how swimming is engaging the older age groups.

In contrast to this, fitness visits start at a high of 42% for 16-24 years and decline to 18% for 75+. The cross over point where swimming and fitness make up the same proportion of visits is the 45-54 age group.

Group fitness is a more consistently popular activity across the age groups, with a peak of 44% in the 45-54 age groups, but a variation of 16% across all age groups.

Graph: Percentage of visits for core three activities split by age group

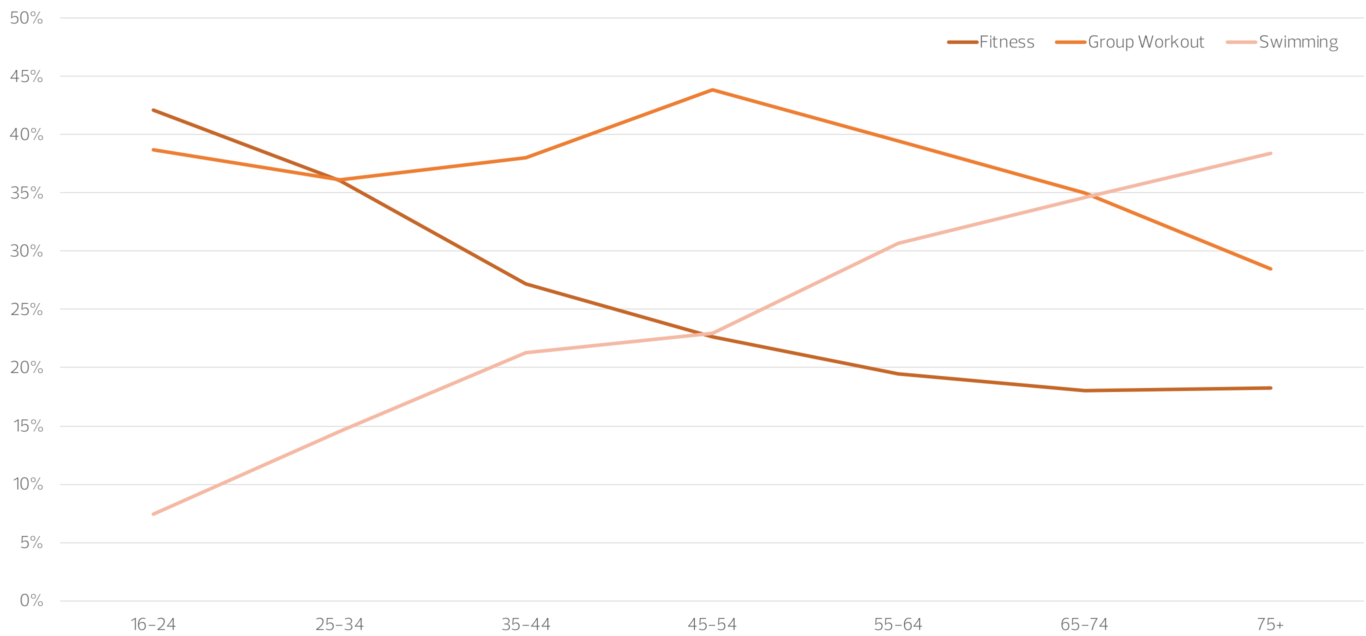



Table: Core activity type by age group

| | 16-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65-74 | 75+ |
|---|---|---|---|---|---|---|---|
| **Fitness** | 42% | 36% | 27% | 23% | 19% | 18% | 18% |
| **Group Workout** | 39% | 36% | 38% | 44% | 39% | 35% | 28% |
| **Swimming** | 7% | 15% | 21% | 23% | 31% | 35% | 38% |

The different age groups also choose different sport types. The table below shows the top three sport activites by age group. Badminton remains popular across all age groups, only losing the top spot at the 65-74 age group where specific 50/60+ activites feature highest.

Squash is another sport that ranks in the top three for all age groups up to 65-74. From 45-54 onwards Health & Wellbeing becomes the third most popular activity. This includes exercise on referral schemes.

Table: Top three sports by age group

| | 16-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65-74 | 75+ |
|---|---|---|---|---|---|---|---|
| 1 | Badminton | Badminton | Badminton | Badminton | Badminton | 50/ 60+ activities | 50/ 60+ activities |
| 2 | Football | Squash | Squash | Squash | Squash | Badminton | Health & Wellbeing |
| 3 | Squash | Football | Health & Wellbeing | Health & Wellbeing | Health & Wellbeing | Health & Wellbeing | Badminton |

## Age and gender: Core activities

The final analysis piece is to segment our **1 million** members by both age and gender to look at the particular nuances and trends within each of these groups. Keeping with the theme of separating out the three core activites we can look at how popular swimming, group fitness and fitness (gym) are for each age and gender group. Roughly speaking all three activites have similar trends across the age groups for male and female:

» Swimming increases in popularity as age increases at a similar rate for both males and females. Across all age groups swimming makes up a higher percentage of visits for females than males. This difference is highest for the oldest age group (75+), where swimming makes up 42% of visits for females against 36% for males.

» Group fitness shows the most consistent popularity across age groups, although the difference between males and females is most pronounced for this activity. Female visits for group fitness remain fairly constant around the 50% mark from 16–24 to 45–54, before a sharp decline. Male percentage of visits are more consistent and have a range of 6% across all age bandings. This is a clear indication that group exercise classes are consistently more popular for females than males.

» Fitness (gym visits) show the same trend across age groups for males and females, with the percentage of visits decreasing with age. This type of visit is more popular for males across all age groups, with a difference of 12–16% between male and female visits across all age groups.

Table: Percentage of visits for swimming by age and gender

| Swimming | Female | Male |
|---|---|---|
| 16–24 | 9% | 6% |
| 25–34 | 16% | 13% |
| 35–44 | 21% | 21% |
| 45–54 | 23% | 23% |
| 55–64 | 33% | 28% |
| 65–74 | 37% | 32% |
| 75+ | 42% | 36% |

Graph: Percentage of visits for swimming by age and gender

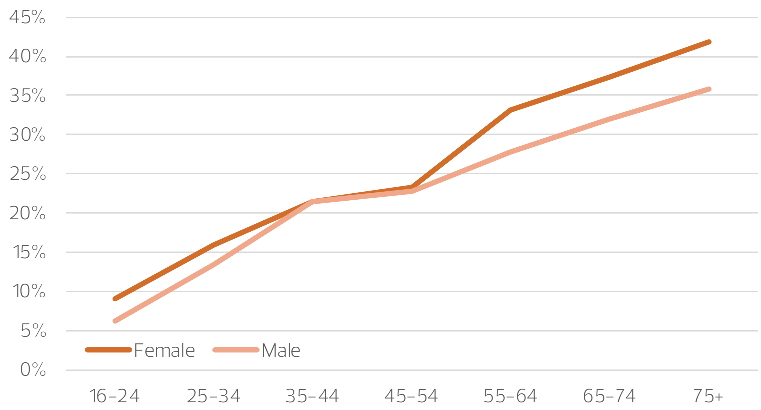



Table: Percentage of visits for Group Workout by age and gender

| Group Workout | Female | Male |
|---|---|---|
| 16–24 | 48% | 31% |
| 25–34 | 48% | 25% |
| 35–44 | 50% | 26% |
| 45–54 | 54% | 32% |
| 55–64 | 46% | 32% |
| 65–74 | 40% | 30% |
| 75+ | 32% | 26% |

Graph: Percentage of visits for Group Workout by age and gender

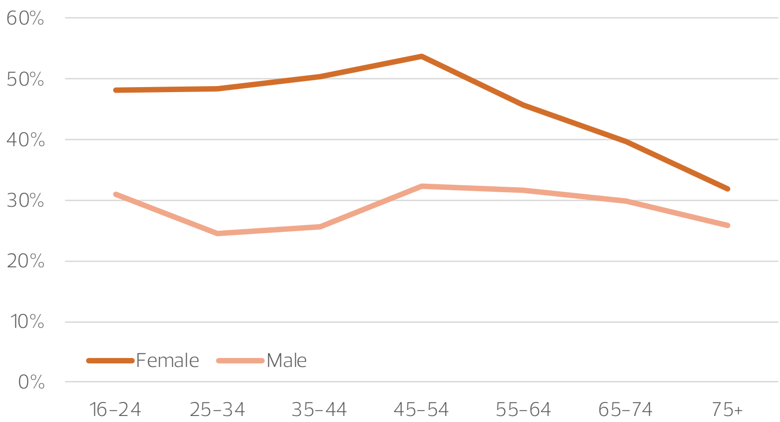
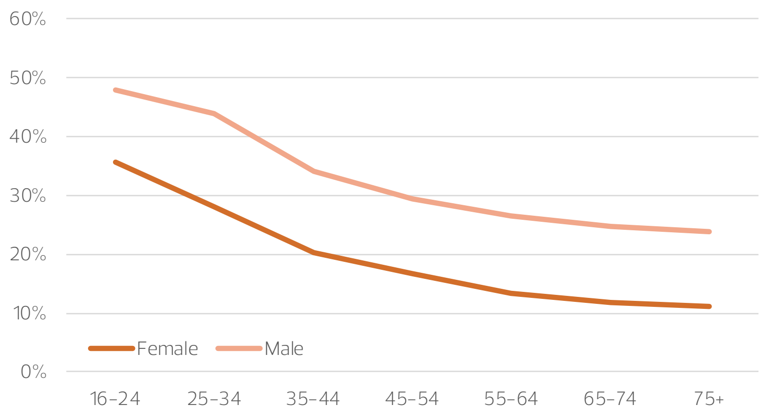



Table: Percentage of visits for Fitness by age and gender

| Fitness | Female | Male |
|---|---|---|
| 16–24 | 36% | 48% |
| 25–34 | 28% | 44% |
| 35–44 | 20% | 34% |
| 45–54 | 17% | 29% |
| 55–64 | 13% | 27% |
| 65–74 | 12% | 25% |
| 75+ | 11% | 24% |

Graph: Percentage of visits for Fitness by age and gender



## Age and gender: Sports (non core activites)

To complete the picture we have looked at the three most popular sports for each age and gender group, aside from the three core activites.

» For both males and females, badminton is a recurring and prominent sport choice. It is the most popular sport for males and females from ages 16-24 to 55-54, with one exception of 25-34 year old males where squash is more frequently played.

» For males, squash and football are also relatively popular. Football does not appear at all in the top three of any female age group.

» For females in the 25-34 and 35-44 year old age groups a new activity emerges- parent and child classes. This shows that these activites are popular with mothers who may be attending less to do their own exercise but are still attending the facility.

» Within the older age groups more specific and tailored activites begin to appear. For both males and females in the 65-74 and 75+ age groups 50/ 60+ activities are the most popular.

» Health and wellbeing, which includes health assessments and exercise referrals, also feature in the older age groups. This activity appears earlier for females, being the 2nd most popular activity at 35-44.

Table: Top three sports by age and gender (male)

| | MALE | | | | | | |
|---|---|---|---|---|---|---|---|
| | 16-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65-74 | 75+ |
| 1 | Badminton | Squash | Badminton | Badminton | Badminton | 50/60+ activities | 50/60+ activities |
| 2 | Football | Badminton | Squash | Squash | Squash | Badminton | Health & Wellbeing |
| 3 | Squash | Football | Football | Tennis | Tennis | Health & Wellbeing | Badminton |

Table: Top three sports by age and gender (female)

| | FEMALE | | | | | | |
|---|---|---|---|---|---|---|---|
| | 16-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65-74 | 75+ |
| 1 | Badminton | Badminton | Badminton | Badminton | Badminton | 50/60+ activities | 50/60+ activities |
| 2 | Squash | Activites with children | Activites with children | Health & Wellbeing | 50/60+ activities | Badminton | Health & Wellbeing |
| 3 | Multi-Sports | Squash | Health & Wellbeing | Squash | Health & Wellbeing | Health & Wellbeing | Tennis |

### Key points

» Females attend a far higher proportion of group workout classes than males, and attend a far smaller proportion of general fitness visits (gym).

» Badminton is the most popular sport for both males and females.

» The prevalance of visits for swimming increases dramatically with age.

» The prevalance of visits for fitness decreases with age.

» Badminton is popular across all age groups.

» As people get older, a higher proportion of visits are for Health & Wellbeing and specific age based activities.

» Swimming is more popular for females of all age groups than males.

# Summary

A huge volume of data has been analysed in this report. Some sections of the data served to confirm existing hypothesis on the state of the leisure industry, and some sparked interesting new discussion on trends, activites and behaviours from different groups using leisure facilities. As the volume of data grows year on year and a more complete historic picture is established, this analysis can be repeated to pick up on new trends and shifts in the leisure landscape. The points below pick out some of the most pertinent findings from the analysis.

### Group Workout Classes

There is a huge variety of group workout classes taking place. Although the traditional activities of cardio and indoor cycling are by far the most popular over the last three years, there has been a reverse in trends with cardio classes becoming less popular as indoor cycling picks up popularity. Overall, the popularity of group workout classes has increased from 2016 as swimmings popularity has fallen slightly. This is a pleasing indication that the large variety of classes is appealing to a broad spectrum of people.

### Swimming

For the past three years swimming has been the most popular activity to take part in at leisure facilities. Although the percentage of visits for swimming has declined so far in 2017, more than one in three visits is still for this activity. The popularity of swimming is even more evident when visits by casual users are isolated- half of lesiure centre visits by casual users are for swimming, making it by far the most popular activity for those who are not facility members.

Swimming is similarly popular for both males and females- 53% of members visits for swimming so far in 2017 were by females. The most striking demographic variation comes with age, with the prevalance of swimming dramatically increasing as people age. Although less than one in ten visits by 16-24 year olds are for swimming, this increases consistently up to the 75+ age group where swimming represents over one in three visits.

### Female Participation

The data on membership highlighted that the percentage of female members has remained constant at 52% over the last two years. Despite there being more female members, the percentage they contribute to overall visits is disproportionately lower at 49%. This indicates there is a small but significant number of females who are not fully utilising their memberships. Female members had a slightly higher mean age than males at 39 years and 10 months. Throughout the analysis one of the most noticeable differences between males and females was the timing of visits, with the late morning slot of 9am-12pm by far the most popular for females. This is a useful piece of knowledge for leisure facilites; combined with data on the favoured activities of females this can help to optimise scheduling and class timetabling.

### Weekend visits

The data around timing of visits revealed some interesting trends around when people are choosing to access leisure facilites. At weekends visit numbers decline, with Saturday and Sunday visits each representing 11% of total visits over the last three years. Although opening hours may be reduced at the weekend, this should be countered by the increased amount of free time that people (weekday workers) should have.

The percentage of weekend visits by casual users only is higher than the overall average, suggesting casual users are taking opportunity of their free time to take part in leisure, whilst members fit in their visits around other committments during the week and pursue other pastimes at the weekend.

### Older age groups

One area of particular under representation in the membership base is the older age groups, with those aged 65+ representing 9% of members but 22% of the UK population as a whole. This obvious skew towards the younger demographic offers a big opportunity for leisure facilities to find out what prevents this group of people from accessing and using their facilities.

The older age groups also have a tendency to visit during the week, with just 7% of visits from over 75's coming at the weekend. The activites that are most popular with these age groups have also been identified- aside from swimming being the most popular of the core three activites, this age group also favours more age specific activites, with 50/ 60+ classes the most frequently chosen class.

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