# Moving Communities:
## Active Leisure Trends 2019 Report

UK active RESEARCH INSTITUTE

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# Introduction

## ukactive Research Institute

At the ukactive Research Institute we are always looking for ways to utilise the expanse of data being collected within our sector to understand the trends, behaviour patterns and changes that are happening within the sport and physical activity sphere.

Our ultimate goal is to use this information to support our members across the breadth of the sector to make the decisions that will not only enable them to optimise their business performance, but will also contribute to our mission of getting more people active and improving the health of the nation.

We are now in our third year of working with DataHub to produce the Moving Communities report, with the most significant change over this time being the continual increase in the size of the data sample we are able to utilise. From just over 300 sites in 2017, we are now able to analyse data from over 500 sites, offering a broader and more accurate representation of the trends in public sector leisure.

In this report we will explore key metrics across four areas, through looking at data from the last three financial years. These areas are 'who' ,'when', 'what' and 'how': in other words looking at the demographic profile of leisure centre users, the most popular times and days to visit, the sports and activities that are taking place, and how these metrics differ by age, gender, and membership status.

We are not seeing seismic shifts from year to year across these metrics- instead what is happening is subtle changes, that given the size of the data set, start to tell interesting stories that merit further exploration. Take for example the age distribution of members of leisure centres- again we see that older age groups are under represented, but we also see that the average age of members is slowly increasing from year to year. Likewise, 'Health and Wellbeing' activities have crept into the top five overall sports activities in the past two years, representing the diversification of services and products that leisure centres are now offering.

We look forward to continuing to work with our members and partners to use data and insight to increase our knowledge and understanding of what is happening in our sector, and to use this knowledge to continue to grow the sector. We hope you find this report useful. If you have any questions or would like to get in touch please email research@ukactive.org.uk

## DataHub

DataHub's commitment to getting more people, more active, more often is as strong today as it was back in 2016 when we powered the first Moving Communities report.

We continually work towards this aim by giving the sector access to real-time, actionable insight which highlights participation trends, benchmarks performance and pinpoints where pockets of inactivity still exist. We're proud to help a growing number of operators, local authorities, national governing bodies and sport for development organisations to better understand consumers, better serve their communities and to activate the nation. It's exciting to see how this leads to the transformation of our sector from being 'data rich, information poor' into one where 'decision are made not based on instincts but insight'.

In 2019, the DataHub reached another significant milestone. The platform now tracks over 630 million visits, from 12 million people across 3,000 leisure centres, sports venues and community sports programmes. Add to that the 4,600 industry professionals who are logging onto the platform on a regular basis, we're supporting the sector to create an insight-led movement to tackle the stubborn inequalities which still exist in sport and physical activity participation.

Partnerships have always been an integral part of DataHub story and the last 12 months has been no exception. We've continued to strengthen partnerships with industry leaders and influencers including ukactive, Sport England, CIMPSA, OpenActive and Active Partnership Network. We've also established new partnerships with Community Leisure UK and expanded the suite of system integrations to include wearable tech solutions and GP referral systems.

So, why should this matter to operators focussed on managing best in class facilities up and down the country? Whilst helping the sector as a whole address the inactivity agenda, intelligence led decisions have a direct impact on operator strategies, marketing campaigns and programming decisions, helping to answer questions like; which activities are most likely to engage target demographic groups, which activities are trending in a constantly evolving industry, what commercial and social returns should we expect through investment and what role can we play within place-based interventions.

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. We look forward to supporting the sector to continue to collaborate more effectively to shape the nation's health and wellbeing conversation.

How has the data changed since last year?

The data sample continues to grow since the inception of this report in 2017. The number of sites contributing data to the report is now 534, a substantial increase from last year where we were able to report data from 396 sites. This continual increase in the sample size means we are able to conduct increasingly rigorous analysis of the leisure landscape each year as the percentage of overall UK site coverage grows.

As new sites join the DataHub this adds to the historical store of data, and also means that the sample size can increase every year. As a result, the specific detail we report will change year on year as the size of the data set increases. The figures in this report offer the latest insight into trends in the industry, both for 2019 and for the preceding three years.

It's also worth noting that only sites that have sent data consistently every month since April 2016 were included in the data set to allow like-for-like comparisons.

Throughout the report, percentages may not add upto 100%. This is due to rounding.

# Moving Communities: Leisure Trends 2019

*Community leisure trends from the last three years*

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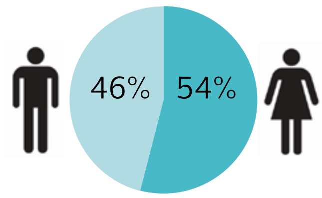
| 534 sites | 9 million members | 246 million visits | 50+ different activities |
|---|---|---|---|

## Who?

Looking at member data from 9 million memberships across three financial years

### Gender

FY19

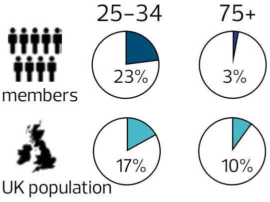



### Average Age

| | |
|---|---|
| FY17 | 39 years 7 months |
| FY18 | 40 years 5 months |
| FY19 | 41 years 2 months |

Average age increasing slightly over three year period

### Age Distribution




Older adults under represented in FY19 members.

### Ethnicity

| % members FY19 | |
|---|---|
| White | 74% |
| Asian | 13% |
| Black | 8% |
| Mixed | 4% |
| Other | 1% |

## When?

Looking at visit data from members and non members from 246 million visits across three financial years

### Day of the week

| | |
|---|---|
| Most popular | Tuesday: 16% |
| Least popular | Saturday: 12% |

Weekdays are more popular than weekends for visits, with 16% of visits falling on a Tuesday over the three financial years.

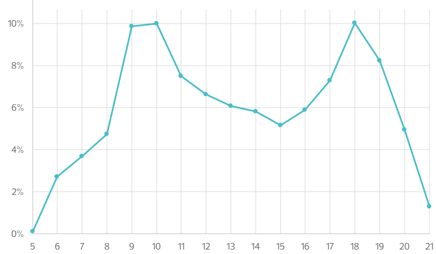
### Member/ non member

% visits at the weekend FY19

| | |
|---|---|
| Non member | 20% |
| Member | 32% |

Members are much less likely to visit at the weekend, with one in five visits then (20%), compared to nearly one in three for non members (32%)

### Time of day




**FY19 visit data:**

› Two clear spikes in visits:

› Early morning (9-10am)

› Late evening (6pm)

› Drop in visits during daytime hours

› 10% of all visits at 9am, 10am and 6pm respectively

## What?

Looking at visit data from over 50 different sports and activities, and over 75 different group workouts

### Core activities

Three activities dominate the data set. The most frequent visit reason in FY19 was swimming, with 42% of total visits.

| | *% all visits* |
|---|---|
| Swimming | 42% |
| Fitness (gym visits) | 22% |
| Group Workout | 17% |

### Other activities

In FY19 nearly one in five (19%) of visits were for sports or activities outside the core three.

| | *% total non-core visits* |
|---|---|
| Football | 27% |
| Badminton | 14% |
| Childrens Programmes | 9% |

### Group Workouts

Within group workouts for FY19, there were over 75 different types of workout. The three most popular are below.

| | *% all group workouts* |
|---|---|
| Aerobics | 11% |
| Indoor Cycling/ Spinning | 11% |
| Yoga | 7% |

### Member/ non member

There were big differences in the percentage of visits for each activity for members and non members.

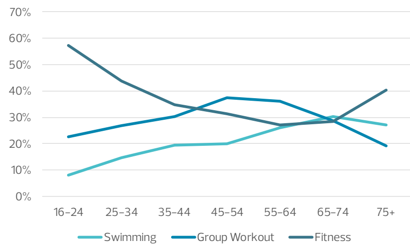
*% all visits*

| | Non member | Member |
|---|---|---|
| Swimming | 62% | 26% |
| Fitness | 5% | 34% |
| Group Workout | 2% | 26% |

## How?

Looking at how visit behaviour differs between demographics

### Differences by age




› The graph shows how exercise preferences change as members get older.

› The youngest age groups have the highest % of overall visits for fitness, and this % decreases with age.

› The % of visits for swimming increases as members get older.

### Differences by gender

| | Female | Male |
|---|---|---|
| SWIMMING | 53% | 47% |
| GROUP WORKOUT | 76% | 24% |
| FITNESS | 37% | 63% |

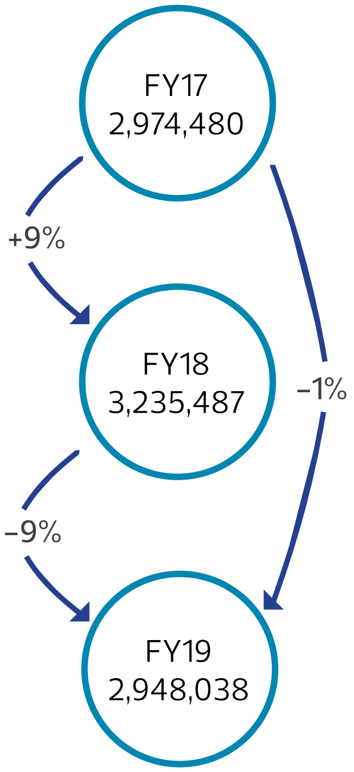
› The differing exercise preferences of males and females are demonstrated through the percentage of visits for the three core categories by both.

› Of all visits for group workouts, over three quarters (76%) were by females.

› The majority of fitness visits were made by males (63%).

For more information and to view the full report please visit **researchinstitute.ukactive.com**

# Who?




## TOTAL MEMBERS

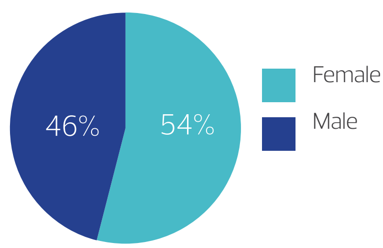
Across the sample of 534 sites, over nine million memberships are represented across the three years. The latest figures from FY19 show a membership base of just under three million (2,948,038).

This is a slight decline overall from the start of the three year period, which saw memberships peak at 3.2 million in FY18.

## GENDER OF MEMBERS

As has been found in previous years, the membership base continues to be skewed slightly in favour of female, with the latest figures from FY19 showing that 54% of memberships belonged to females. This split has remained level over the last three financial years, increasing a small amount from 53% in both FY17 and FY18.

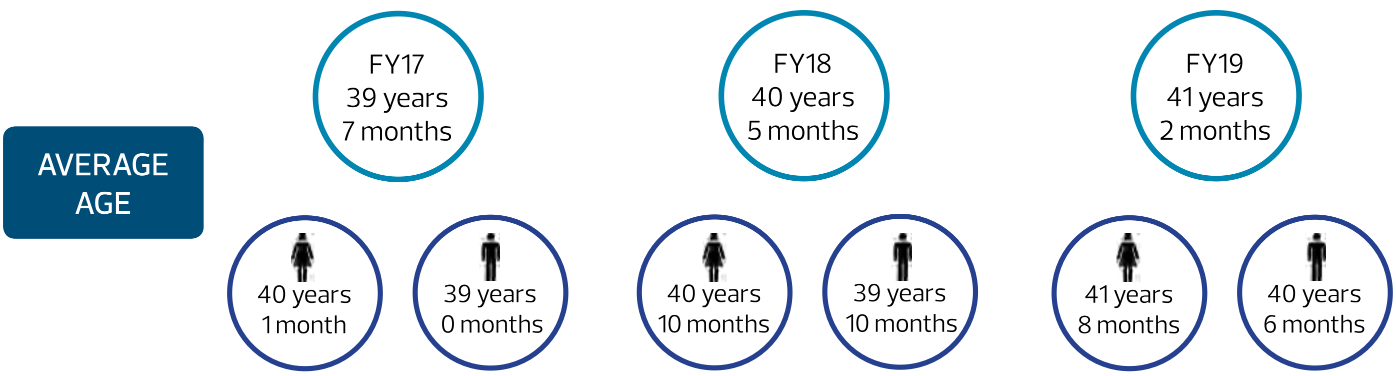
Gender breakdown of members



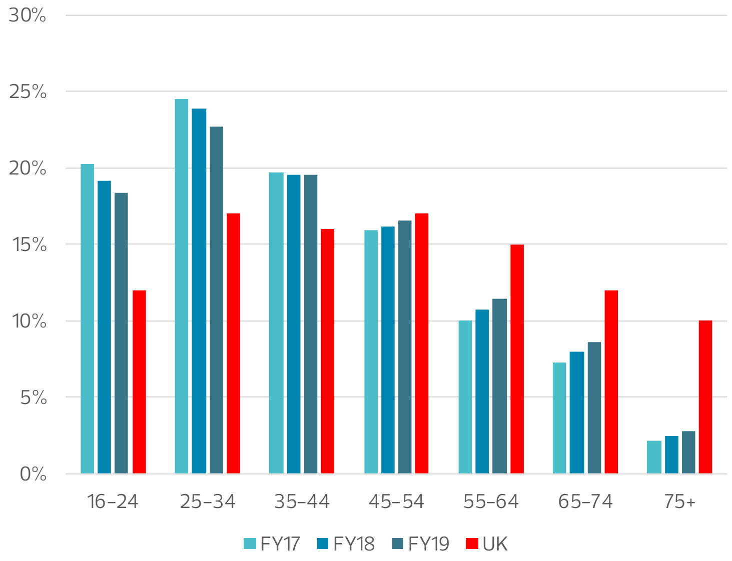

## AGE OF MEMBERS

The age breakdown of adult members (those aged 16 and over in the data) continues to show a membership base dominated by the younger age groups. In FY19, 23% of members were aged 25-34, although this is a slight decline from the previous years. This is also reflected in the average age of members, which has crept up to 41 years 2 months, up from 39 years 7 months in FY17. The older age groups are where the greatest disparity against the UK population is evident (ONS Mid Year Estimates 2017). Those aged over 55 account for 23% of the membership base in FY19, and 37% of the UK population.

*Average age of members*



*Age distribution of members (graph)*




*Age distribution of members (table)*

| | FY17 | FY18 | FY19 | UK |
|---|---|---|---|---|
| 16-24 | 20% | 19% | 18% | 12% |
| 25-34 | 25% | 24% | 23% | 17% |
| 35-44 | 20% | 20% | 20% | 16% |
| 45-54 | 16% | 16% | 17% | 17% |
| 55-64 | 10% | 11% | 11% | 15% |
| 65-74 | 7% | 8% | 9% | 12% |
| 75+ | 2% | 2% | 3% | 10% |

## ETHNICITY OF MEMBERS

Ethnicity data is available for the last two financial years, with little difference between the breakdown of member ethnicities. Whilst a large proportion of members have ethnicity reported as unknown, or not given, in FY19 there was over half a million records (605,855) that have a given ethnicity. The breakdown is reported in the table below and shows that the UK leisure population is more diverse than the general UK breakdown, taken from the 2011 Census.

*Ethnicity of members*

| | FY18 | FY19 | UK |
|---|---|---|---|
| White | 75% | 74% | 86% |
| Asian | 13% | 13% | 8% |
| Black | 8% | 8% | 3% |
| Mixed | 4% | 4% | 2% |
| Other | 1% | 1% | 1% |

## SOCIAL DEPRIVATION OF MEMBERS

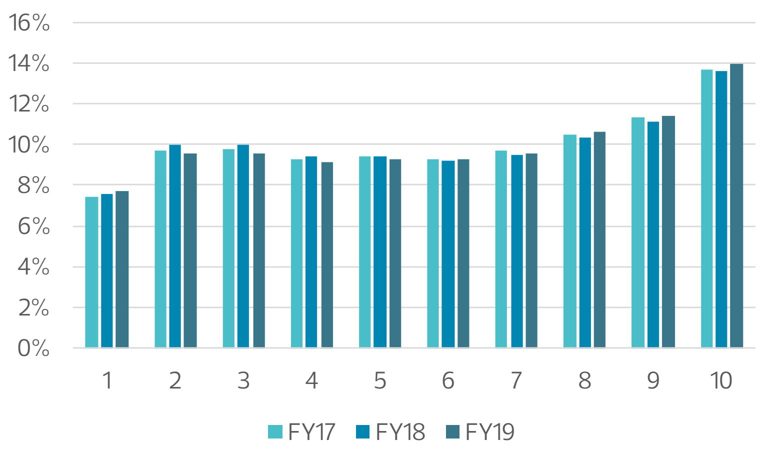
Using postcode data supplied by members, a social deprivation index can be calculated. This is a government tool which measures the relative deprivation of a local area using a range of factors including: income deprivation, health deprivation and disability, employment deprivation, crime, education, skills and training, deprivation, and 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 deciles.

There has been little movement on this metric over the last three financial years, with 8% of members currently residing in the most deprived areas. Likewise, the least deprived 10% of areas supply 14% of members.

*Social deprivation index of members (table)*

| IMD | FY17 | FY18 | FY19 |
|---|---|---|---|
| 1 | 7% | 8% | 8% |
| 2 | 10% | 10% | 10% |
| 3 | 10% | 10% | 10% |
| 4 | 9% | 9% | 9% |
| 5 | 9% | 9% | 9% |
| 6 | 9% | 9% | 9% |
| 7 | 10% | 9% | 10% |
| 8 | 10% | 10% | 11% |
| 9 | 11% | 11% | 11% |
| 10 | 14% | 14% | 14% |

*Social deprivation index of members (graph)*




**Key Facts**

>> The number of total members has decreased slightly over the three year period.

>> Females make up 54% of the membership in FY19, a very small increase on previous years (53%).

>> The average age of a member is 41 years 2 months, this has increased by over a year across the time period.

>> Despite this, the older population remain under represented against the national population.

>> Nearly three quarters of members gave their ethnicity as White.

>> The social deprivation index for members has remained largely unchanged over the last three financial years.

>> 14% of members come from the least deprived 10% of areas.

# When?

## DAY OF THE WEEK

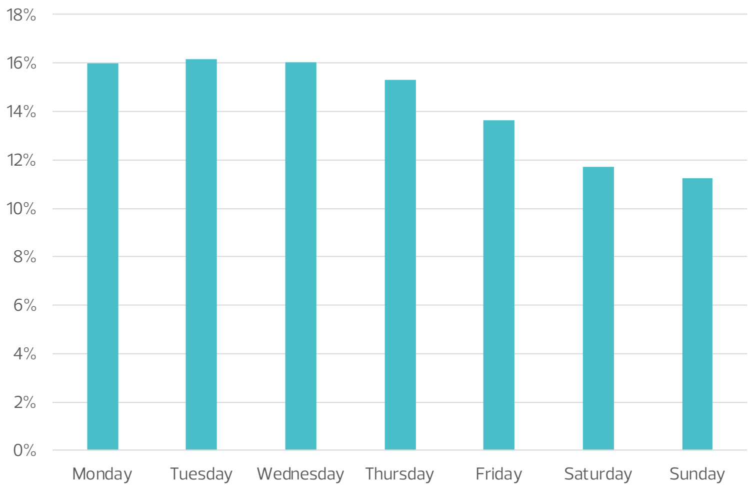
The last three financial years show that visitor habits are remaining relatively constant- there has been minimal change in the least and most popular days to visit a leisure centre. In FY17 and FY18 Tuesday was the day that received the most visits, with FY19 showing Monday as the most popular day. Across all three years the difference between Monday to Wednesday was small. The most notable weekday trend is the drop off in visits on a Friday, demonstrated across all three years and also overall, with 13.6% of visits on this day.

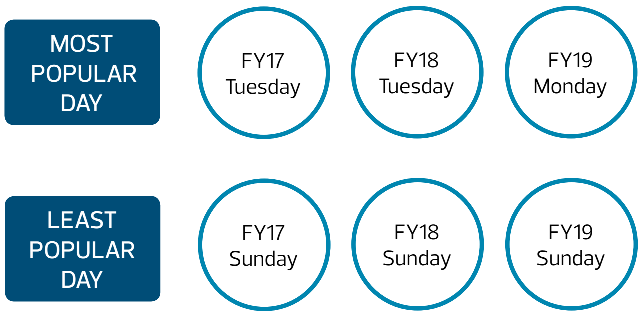
The weekends remain a quiet time for the centres in the data sample. Across the three financial years weekends saw 23% of visits (an even distribution across all days would see 29% of visits fall on the weekends). Historically, Saturday has seen slightly more visits than Sunday but in FY19 this is less pronounced, with both having 11.6% of the visits. This will be an interesting trend to monitor over the next year.

*Breakdown of total visits by day of the week*

| | FY17 | FY18 | FY19 | Overall |
|---|---|---|---|---|
| Monday | 15.9% | 15.9% | 16.1% | 16.0% |
| Tuesday | 16.2% | 16.3% | 15.9% | 16.1% |
| Wednesday | 16.1% | 16.1% | 15.8% | 16.0% |
| Thursday | 15.2% | 15.4% | 15.3% | 15.3% |
| Friday | 13.8% | 13.4% | 13.6% | 13.6% |
| Saturday | 11.6% | 12.0% | 11.6% | 11.7% |
| Sunday | 11.1% | 11.0% | 11.6% | 11.2% |

*Breakdown of total visits by day of the week*



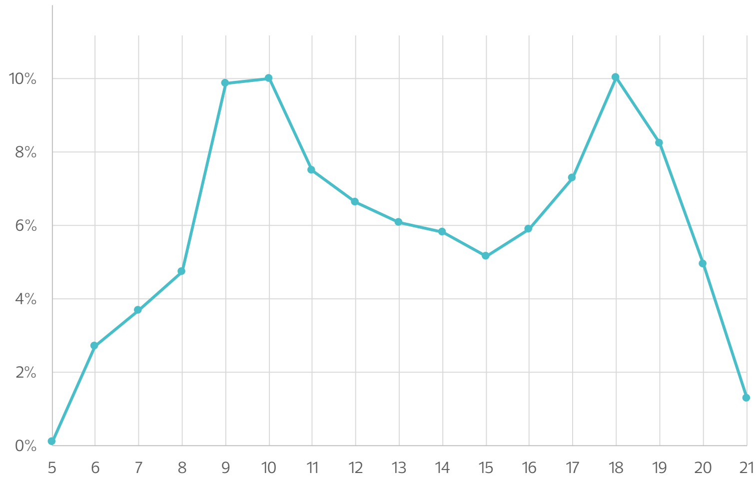
## TIME OF THE DAY

The distribution of visits throughout the day shows a clear double peak- first at late morning (9am/ 10am) and then again in the early evening (6pm). Visits tail off sharply as the evening progresses. The early evening peak would account for a post work rush, with the early morning seemingly too late for the traditional 9-5 working pattern.

*Breakdown of visits times by hour*

| Time | FY17 | FY18 | FY19 | Overall |
|---|---|---|---|---|
| 05 | <1% | <1% | <1% | <1% |
| 06 | 3% | 3% | 3% | 3% |
| 07 | 4% | 4% | 4% | 4% |
| 08 | 5% | 5% | 5% | 5% |
| 09 | 9% | 10% | 10% | 10% |
| 10 | 10% | 10% | 10% | 10% |
| 11 | 7% | 8% | 8% | 8% |
| 12 | 7% | 7% | 7% | 7% |
| 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% | 8% | 8% | 8% |
| 20 | 5% | 5% | 5% | 5% |
| 21 | 1% | 1% | 1% | 1% |
| 22 | <1% | <1% | <1% | <1% |
| 23 | <1% | <1% | <1% | <1% |

*Breakdown of visits times by hour (graph)*




*Breakdown of visits times by category*

| Time | FY17 | FY18 | FY19 | Overall |
|---|---|---|---|---|
| Early morning (pre 9am) | 11% | 11% | 12% | 11% |
| Late Morning (9am-12pm) | 26% | 28% | 28% | 27% |
| Early Afternoon (12pm-3pm) | 19% | 19% | 18% | 19% |
| Late Afternoon (3pm-6pm) | 18% | 18% | 18% | 18% |
| Early Evening (6pm-9pm) | 24% | 23% | 22% | 23% |
| Late Evening (9pm onwards) | 1% | 1% | 1% | 1% |

| | FY17 | FY18 | FY19 |
|---|---|---|---|
| MOST POPULAR TIME | 6pm | 10am | 9am |
| LEAST POPULAR TIME | 11pm | 11pm | 11pm |

Understandably, the earliest morning slots are very quiet, with visits before 9am making up 11% of total visits across the three financial years. The three most popular visit hours have been 9am, 10am and 6pm in each of the financial years although the specific hour within each year receiving the most visits has changed in each.

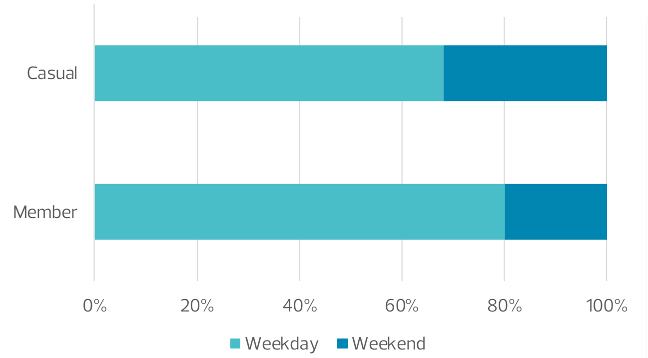
## MEMBER VISITS VS CASUAL VISITS

There remains some broad differences between the visit patterns of leisure centre members, and casual/ pay as you go visitors who turn up on an ad hoc basis. Nearly one third of visits from casual users fell on a weekend (31%), compared to one in five from members (20%). Casual users were also more likely to visits in the early afternoon, but showed little interest in the early morning pre 9am slot (6% of all visits compared to 13% of members).

**Member visits** *by paid members of sites, where operators would have some additional information on the participant such as age and gender*

**Casual visits** *by pay as you go users, where operators would not record any additional information on the visitor*

*Split of visit day by visitor type*




**% OF VISITS AT THE WEEKEND**

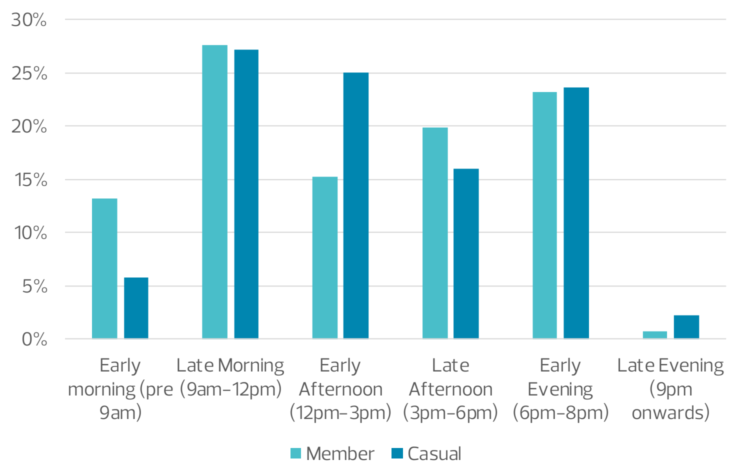
Member: 20%

Casual: 32%

*Split of visit time by visitor type (table)*

| Time | Member | Casual |
|---|---|---|
| Early morning (pre 9am) | 13% | 6% |
| Late Morning (9am-12pm) | 28% | 27% |
| Early Afternoon (12pm-3pm) | 15% | 25% |
| Late Afternoon (3pm-6pm) | 20% | 16% |
| Early Evening (6pm-9pm) | 23% | 24% |
| Late Evening (9pm onwards) | 1% | 2% |

*Split of visit time by visitor type (graph)*

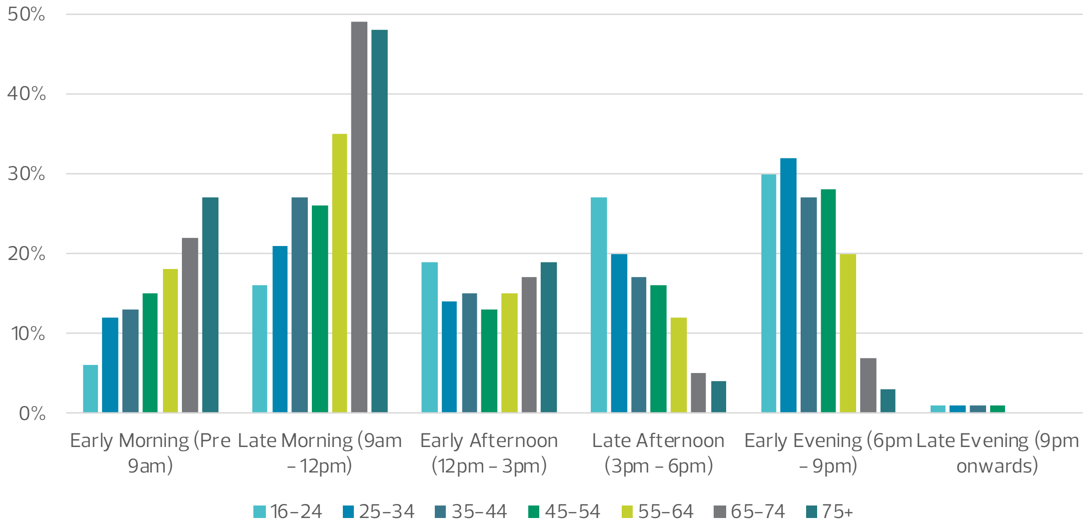


## DIFFERENCE BETWEEN AGES

There were some noticeable differences in visit patterns across the membership base, firstly with older members much less likely to visit at weekends. For the 75+ age group, only 6% of their visits came at the weekend, compared to 23% for 35-44 year olds. There were also key differences in the visit time patterns of different age groups, with younger members favouring early evening exercise (33% of visits by 25-34 year olds were between 6pm and 8pm), in contrast with 7% of visits by the 65-74 year old age group and just 3% by the 75+ group.

| % OF VISITS AT THE WEEKEND | 16-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65-74 | 75+ |
|---|---|---|---|---|---|---|---|
| | 18% | 21% | 23% | 21% | 16% | 9% | 6% |

*Breakdown of visits times by age (graph)*




*Breakdown of visits times by age (table)*

| Time | 16-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65-74 | 75+ |
|---|---|---|---|---|---|---|---|
| Early morning (pre 9am) | 6% | 12% | 13% | 15% | 18% | 22% | 27% |
| Late Morning (9am-12pm) | 16% | 21% | 27% | 26% | 35% | 49% | 48% |
| Early Afternoon (12pm-3pm) | 19% | 14% | 15% | 13% | 15% | 17% | 19% |
| Late Afternoon (3pm-6pm) | 27% | 20% | 17% | 16% | 12% | 5% | 4% |
| Early Evening (6pm-9pm) | 30% | 32% | 27% | 28% | 20% | 7% | 3% |
| Late Evening (9pm onwards) | 1% | 1% | 1% | 1% | 0% | 0% | 0% |

## DIFFERENCE BETWEEN GENDERS

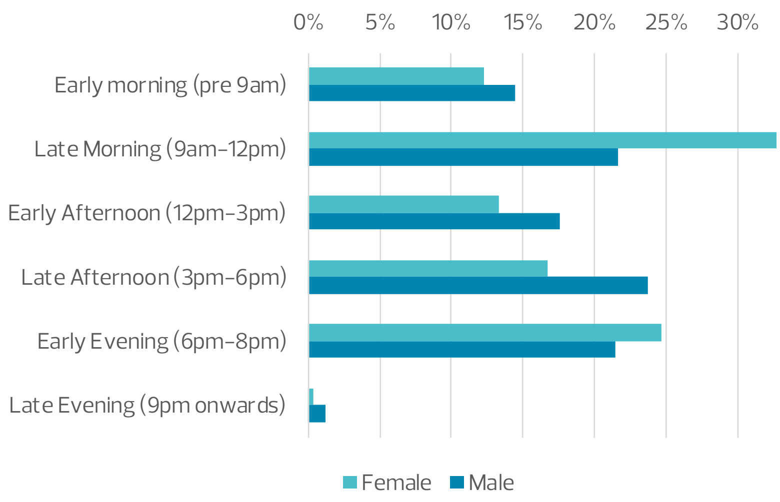
There was little difference between the daily distribution of visits by males and females. Where differences were seen was in the timing of these visits, with some differing trends in the most popular times to visit. One third of visits by females fell in the late morning (9am-12pm) slot, compared to 22% of visits by males.

Conversely, males were more likely than females to visit in the late afternoon slot (3pm-6pm), with 24% of visit in this time compared to 17%.

*Breakdown of visits days by gender*

| Time | Female | Male |
|---|---|---|
| Monday | 18% | 17% |
| Tuesday | 17% | 16% |
| Wednesday | 17% | 16% |
| Thursday | 16% | 16% |
| Friday | 13% | 14% |
| Saturday | 10% | 10% |
| Sunday | 9% | 10% |

*Breakdown of visits times by gender (graph)*




*Breakdown of visits times by gender (table)*

| Time | Female | Male |
|---|---|---|
| Early morning (pre 9am) | 12% | 14% |
| Late Morning (9am-12pm) | 33% | 22% |
| Early Afternoon (12pm-3pm) | 13% | 18% |
| Late Afternoon (3pm-6pm) | 17% | 24% |
| Early Evening (6pm-9pm) | 25% | 21% |
| Late Evening (9pm onwards) | 0% | 1% |

### Key Facts

>> In terms of days of the week, visit patterns have remained fairly constant over the three financial years.

>> Overall, Tuesday is the most popular day to visit (16% of total visits), and Sunday the least (11% of total).

>> In terms of times of visits, there are two clear peaks, one early morning (9am/10am) and one early evening (6pm).

>> Casual visitors are more likely to visit at the weekend than members, with 32% of their visits falling on Saturday or Sunday compared to 20% of members.

>> Older age groups visit much less frequently at weekends (6% of visits for 75+ compared to 18% for 16-24 year olds).

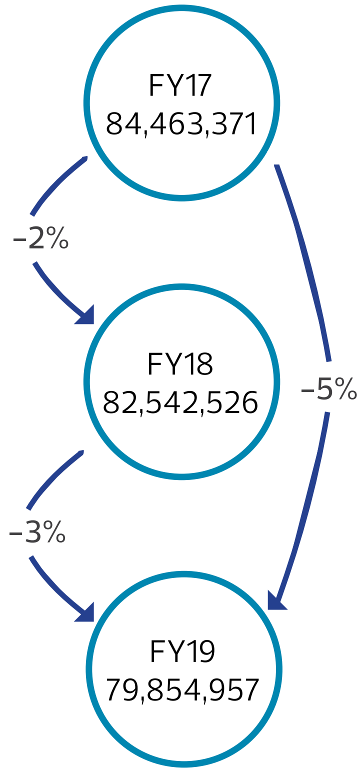
>> One third of female visits are in the late morning (9am-12pm) slot, compared to 22% of male visits.

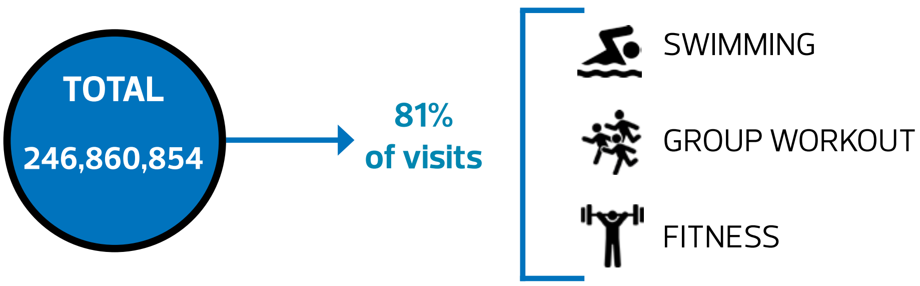
# What?

## TOTAL VISITS

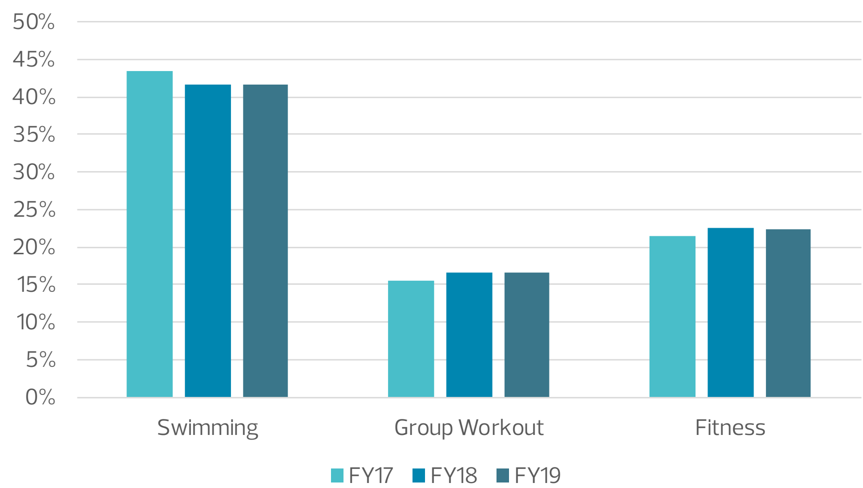
The expanded data set now contains details of over 246 million visits to leisure centres. In terms of visit numbers, there has been a decline of 5% in the number of annual visits from FY17 to FY19, with total visits now just under 80 million.

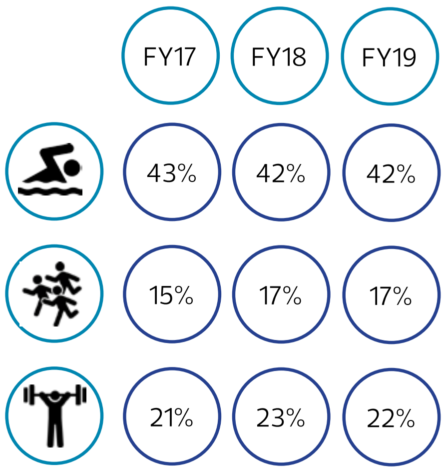
Of the total visits across the three years, 81% are made up of the 'core three' activities provided by leisure centres– swimming, group workouts, and fitness (where fitness is independent gym visits). These have been the dominant three activities for the last three financial years. The most noticeable change in this time has been a drop in the percentage of visits that are for swimming, from 43% in FY17 to 42% in FY19. This has been accompanied by a slight rise in the percentage of visits for group workouts (15% to 17%).




*Split of visit type by year for core three activities*



## GROUP WORKOUTS

Within the dataset over 75 different types of group workouts have been recorded, showcasing the breadth and diversity of the offer available for the public. These range from the tried and tested classes that have been a stalwart of club timetables for years, to new innovative and exciting classes that build on the latest fitness trends such as high intensity workouts.

The most popular five group workouts have stayed the same over the last three financial years, although top spot has been taken by aerobics in FY19, pushing indoor cycling/ spinning into second place. The difference between these two is minimal, with both contributing 11% of total group workouts. Yoga, pilates, and Body Pump have taken up the remaining places in the top five, with the exact positions of these workouts changing year on year.

| 2017 | | 2018 | | 2019 | |
|---|---|---|---|---|---|
| Indoor Cycling/ Spinning | 13% | Indoor Cycling/ Spinning | 12% | Aerobics | 11% |
| Aerobics | 10% | Aerobics | 10% | Indoor Cycling/ Spinning | 11% |
| Body Pump | 6% | Pilates | 6% | Yoga | 7% |
| Pilates | 6% | Yoga | 6% | Pilates | 6% |
| Yoga | 6% | Body Pump | 6% | Body Pump | 6% |

## SPORTS VISITS

Aside from the three core activities of swimming, group workouts and fitness, the remainder of visits are for sports (or sports based) activities. Over the last three financial years football has been the most popular sport. This has increased from one in five visits in FY17 to over one in four in FY19 (27%). All the top four activities stayed the same over the three years- football, badminton, childrens programmes and squash.

| 2017 | 2018 | 2019 YTD |
| --- | --- | --- |
| 20% | 19% | 19% |

The childrens programmes category includes activities such as soft play, crèche, under 5 classes and holiday activities. Attendance at these is tracked against the adult accompanying the child, and shows the important role leisure centres play beyond physical recreation. A new category in the last two financial years is 'Health and Wellbeing'. This includes nutrition sessions as well as GP referrals.

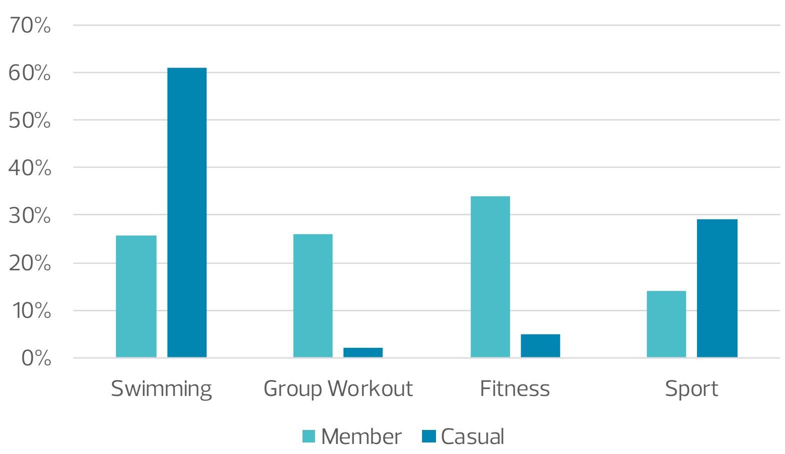
The increase in popularity of football corresponds to a 24% increase in visits from FY17 to FY19. Other sports that have seen substantial increases in visits over this time include 50+ activities (+235%), hockey (+90%), health and wellbeing (+67%), and gymnastics (+63%).

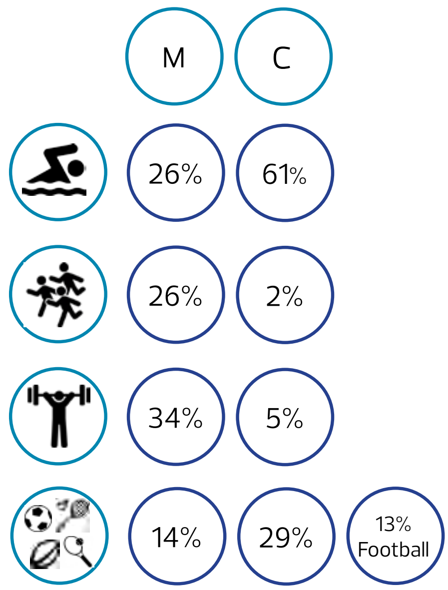
| 2017 | | 2018 | | 2019 | |
| --- | --- | --- | --- | --- | --- |
| Football | 20% | Football | 23% | Football | 27% |
| Badminton | 14% | Badminton | 14% | Badminton | 14% |
| Childrens Programmes | 11% | Childrens Programmes | 10% | Childrens Programmes | 9% |
| Squash | 7% | Squash | 7% | Squash | 6% |
| Tennis | 5% | Health and Wellbeing | 5% | Health and Wellbeing | 6% |

## CASUAL VISITS AND MEMBER VISITS

Having just seen that football is the most popular sport, we can now see that this is driven by casual users, for whom the sport makes up 13% of overall visits, (and 42% of sport specific visits) far more than group workouts or fitness. For casual users, the predominate reason for visiting is swimming, with over 60% of visits for this. On the contrary, members visits are split far more evenly across the core three activities, with swimming and group work-outs each contributing just over a quarter of total visits (26%).

*Split of visit type by visitor type*




| Member | | Casual | |
|---|---|---|---|
| Badminton | 24% | Football | 40% |
| Squash | 11% | Childrens Programmes | 9% |
| Health & Wellbeing | 10% | Badminton | 7% |
| Football | 8% | Trampolining | 5% |
| Childrens Programmes | 8% | Climbing | 4% |

Badminton is the most popular sport of choice for members to a leisure centre, making up nearly one quarter of visits (24%). Squash accounts for one in ten sport visits for members (11%).

Trampolining and climbing both appear in the top five list for casual users only, highlighting the ability of these activities to generate fresh interest in exercise from new users.

## TRENDS

Some group workouts have experienced a big increase in the number of visits from FY17 to FY19. The classes that have seen growth of more than 20% are shown below. Only those with more than 10,000 visits in FY19 are included.

*Group workouts with greater than 20% increase in visits*

| Group Workout | FY17 | FY19 | % increase |
|---|---|---|---|
| Rebound UK | 14,108 | 26,711 | 89% |
| Pump FX | 73,247 | 110,399 | 51% |
| Clubbercise | 29,913 | 41,886 | 40% |
| Body Works | 14,700 | 20,355 | 38% |
| Virtual Classes | 12,311 | 16,644 | 35% |
| Chair Based Exercise | 20,881 | 27,220 | 30% |
| HIIT | 67,053 | 86,617 | 29% |

### Key Facts

>> The data set contains details of 246 million visits over three financial years.

>> Three 'core' activities dominate visits- swimming, group workouts and fitness- which make up 81% of overall visits.

>> There are over 75 different group workouts in the dataset for FY19. Aerobics, indoor cycling/ spinning and yoga were the three most popular.

>> Aside from the core three activities, there is a data from a wide range of sports. Football, badminton and children programmes (crèche and soft play) are the top three in FY19.

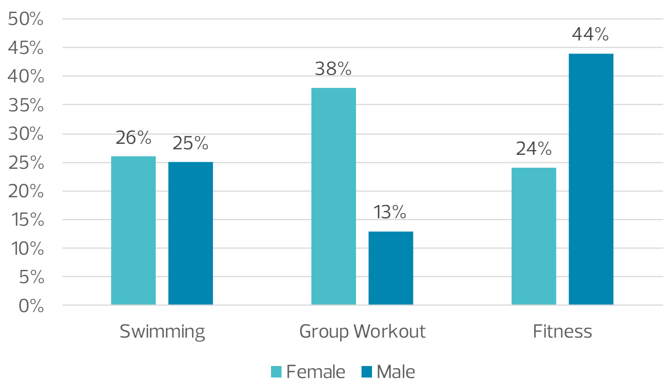
>> There are some key differences between visits by casual users and visits by members. Casual users visit for swimming 61% of the time, compared to 26% for members.

# How?

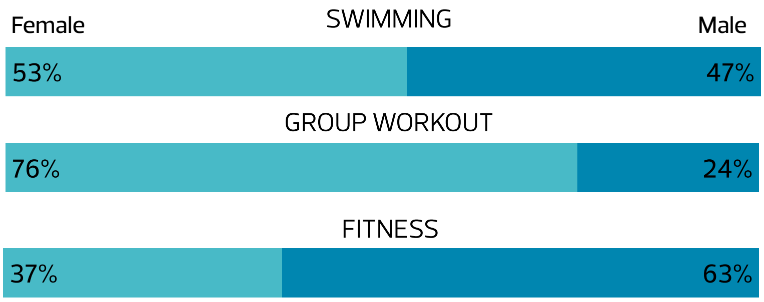
## GENDER DIFFERENTIALS

By splitting total visits according to who made them, the key differentials between males and female can be identified. There is a marked difference in the reason for visiting, with females preferring group workouts (38% of total visits) over fitness or swimming. Males are most likely to be found doing fitness workouts (44% of overall visits), with relatively few doing group workouts (13% of overall visits). Swimming is equally popular for both, attributing 26% of female visits and 25% of male.

*Split of visits for core activities by gender*

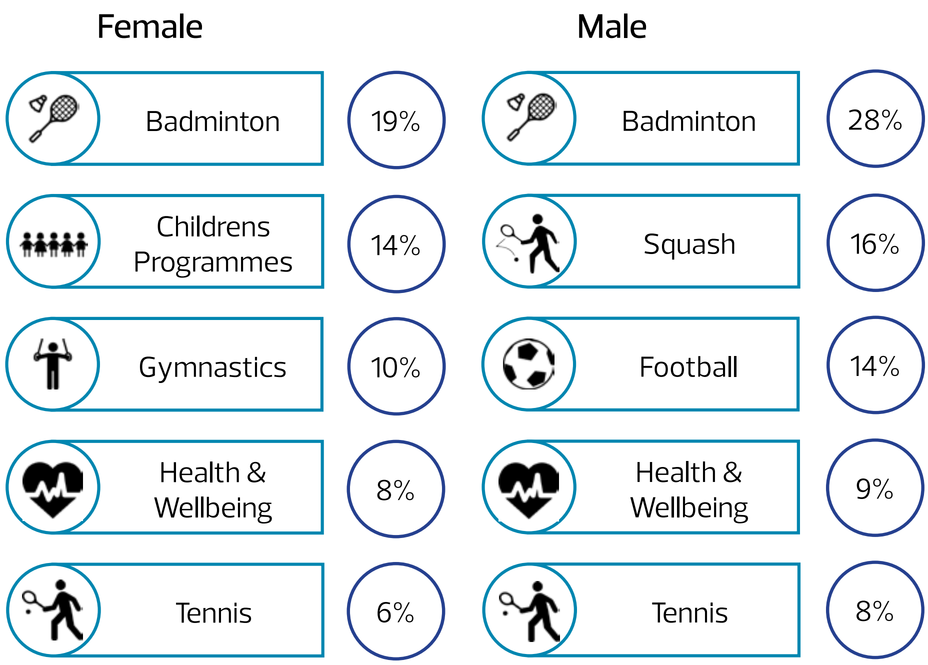



*Percentage of total visits for core activities by gender*




The figure on the left shows the split of visits for each activity by male and female members- this demonstrates that over three quarters of group exercise visits are by females (76%), whereas nearly two thirds of fitness visits are by males (63%).

The breakdown of sports by gender is shown on the right. Badminton is the most popular for both males and females. The main difference in the top five across genders is childrens programmes, which are the second most popular sport/ activity for females, but do not feature in the top five sports/ activities chosen by men. Squash and football are second and third for males, but do not appear in the top five for females. Combining this information with visit time information can help with optimising class times and schedules and matching demand for classes to the most appropriate time to hold them.

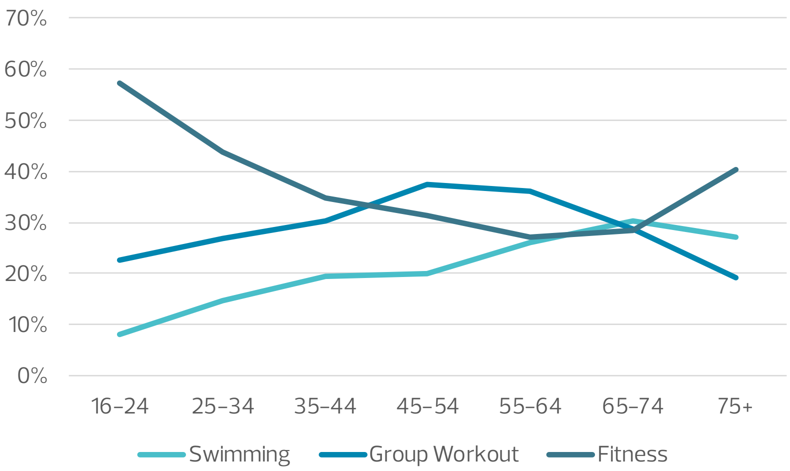


## AGE DIFFERENTIALS

The graph below shows how exercise preferences changes as member age increases. The younger age groups favour fitness workouts, with this making up over half of the visits for 16-24 year olds (57%). This drops consistently as member age increases, although there is an increase again as we get to the 75+ age group. In contrast with this, swimming and group workouts both increase in popularity with age, with swimming moving from 8% of visits for 16-24 year olds to 30% for 65- 74 year olds.

It is the 65- 74 year old age group where visits for the three activities equalise- with swimming (30%), group workout (29%) and fitness (29%).

*Split of visits for core activities by age (graph)*




*Split of visits for core activities by age (table)*

| Time | Swimming | Group Workout | Fitness |
|---|---|---|---|
| 16-24 | 8% | 23% | 57% |
| 25-34 | 15% | 27% | 44% |
| 35-44 | 19% | 30% | 35% |
| 45-54 | 20% | 38% | 31% |
| 55-64 | 26% | 36% | 27% |
| 65-74 | 30% | 29% | 29% |
| 75+ | 27% | 19% | 40% |

The graphic below shows how sport preferences change with age, with the top three sports/ sport activities for each age group shown below. Badminton is the most popular until the 65-74 year old age group, where health and wellbeing takes top spot. Football is the second most popular for the youngest age group but does not appear again in any of the top threes.

Some sports/ sport activities fit in with life stages, with childrens programmes appearing at age 25-34 and 35-44, and health and wellbeing first featuring at 45-54. This category includes GP exercise referral sessions, as well as nutrition and rehab sessions. Squash is another sport that is popular across the ages, appearing in the top three for all age groups from 16-24 to 55-64.

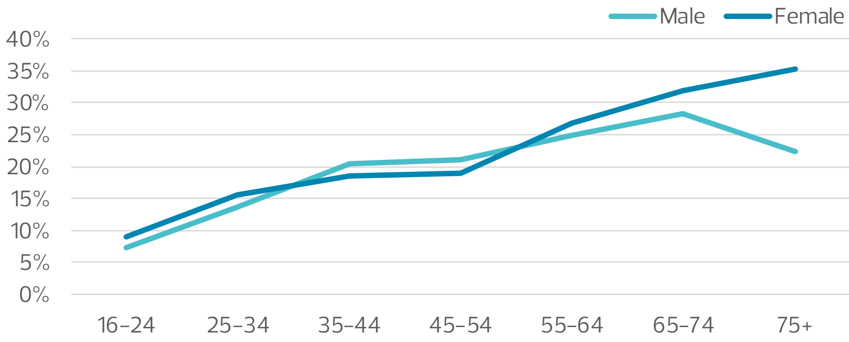
| 16-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65-74 | 75+ |
|---|---|---|---|---|---|---|
| Badminton | Badminton | Badminton | Badminton | Badminton | Health and Wellbeing | Health and Wellbeing |
| Football | Squash | Squash | Squash | Health and Wellbeing | Badminton | 50+ 50+ Activities |
| Squash | Childrens Programmes | Childrens Programmes | Health and Wellbeing | Squash | 50+ 50+ Activities | Bowls |

## AGE AND GENDER DIFFERENTIALS

The three graphs below segment visit activity further by both age and gender. Broadly speaking, visit patterns for all three of the core activities follow the trends already seen.

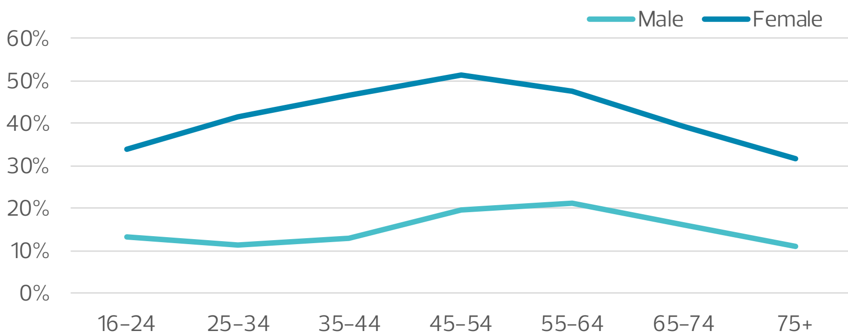
*Split of visits for swimming by gender*

| Swimming | Female | Male |
|---|---|---|
| 16–24 | 9% | 7% |
| 25–34 | 16% | 14% |
| 35–44 | 19% | 20% |
| 45–54 | 19% | 21% |
| 55–64 | 27% | 25% |
| 65–74 | 32% | 28% |
| 75+ | 35% | 22% |



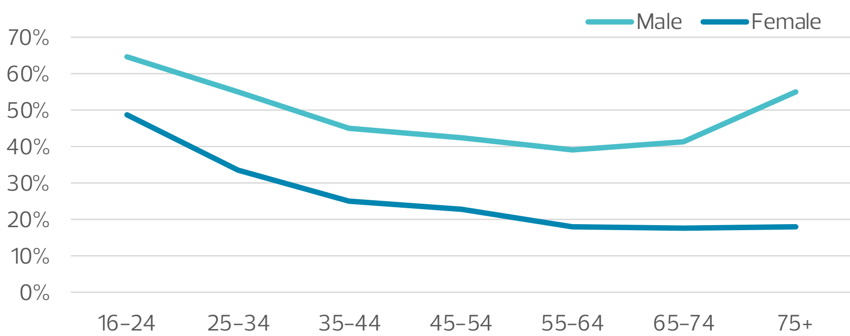

*Split of visits for group workout by gender*

| Group Workout | Female | Male |
|---|---|---|
| 16–24 | 34% | 13% |
| 25–34 | 42% | 11% |
| 35–44 | 46% | 13% |
| 45–54 | 51% | 20% |
| 55–64 | 48% | 21% |
| 65–74 | 39% | 16% |
| 75+ | 32% | 11% |




*Split of visits for fitness by gender*

| Fitness | Female | Male |
|---|---|---|
| 16–24 | 49% | 65% |
| 25–34 | 33% | 55% |
| 35–44 | 25% | 45% |
| 45–54 | 23% | 43% |
| 55–64 | 18% | 39% |
| 65–74 | 18% | 41% |
| 75+ | 18% | 55% |



The following table shows the most popular three group workouts and sports/ activities for each age and gender segment. Circuits are a class that are popular with males of all ages, featuring in the top three for all groups apart from 55-64. This does not appear in the top three for females of any age. Likewise, Body Pump is in the top three for females in the first four age brackets, but not for any male age bands. Pilates is popular for older females, but not males.

| Top Three Group Workouts By Age and Gender | | | | |
|---|---|---|---|---|
| Age | | **1** | **2** | **3** |
| 16-24 | **Female** | Indoor Cycling/ Spin | Body Pump | Aerobics |
| | **Male** | Indoor Cycling/ Spin | Circuits | Aerobics |
| 25-34 | **Female** | Indoor Cycling/ Spin | Aerobics | Body Pump |
| | **Male** | Indoor Cycling/ Spin | Circuits | Yoga |
| 35-44 | **Female** | Indoor Cycling/ Spin | Aerobics | Body Pump |
| | **Male** | Indoor Cycling/ Spin | Aerobics | Circuits |
| 45-54 | **Female** | Indoor Cycling/ Spin | Aerobics | Body Pump |
| | **Male** | Indoor Cycling/ Spin | Aerobics | Circuits |
| 55-64 | **Female** | Aerobics | Pilates | Yoga |
| | **Male** | Indoor Cycling/ Spin | Aerobics | Yoga |
| 65-74 | **Female** | Aerobics | Pilates | Yoga |
| | **Male** | Aerobics | Indoor Cycling/ Spin | Circuits |
| 75+ | **Female** | Aerobics | Pilates | Health Classes |
| | **Male** | Aerobics | Health Classes | Circuits |

| Top Three Sports Activities by Age and Gender | | | | |
|---|---|---|---|---|
| **Age** | | **1** | **2** | **3** |
| **16–24** | **Female** | Badminton | Squash | Tennis |
| | **Male** | Badminton | Football | Squash |
| **25–34** | **Female** | Childrens Programmes | Badminton | Squash |
| | **Male** | Badminton | Squash | Football |
| **35–44** | **Female** | Childrens Programmes | Badminton | Walking |
| | **Male** | Badminton | Squash | Football |
| **45–54** | **Female** | Badminton | Walking | Health & Wellbeing |
| | **Male** | Badminton | Squash | Health & Wellbeing |
| **55–64** | **Female** | Badminton | Health & Wellbeing | 50+ Activities |
| | **Male** | Badminton | Squash | Health & Wellbeing |
| **65–74** | **Female** | 50+ Activities | Health & Wellbeing | Badminton |
| | **Male** | Health & Wellbeing | Badminton | Bowls |
| **75+** | **Female** | 50+ Activities | Health & Wellbeing | Bowls |
| | **Male** | Health & Wellbeing | Bowls | Badminton |

## Key Facts

>> The data shows some areas where trends differ by member age and gender.

>> Females are more likely to visit for group workouts (38% of total compared to 13% for males).

>> Female visits account for 76% of all group workout visits.

>> Badminton is the most popular sport for males and females, but squash is second for males and childrens programmes second for females.

>> Swimming increases in popularity with age, making up 8% of visits for 16-24 year olds and 30% for 65-74.

>> Class preferences also change with age, with badminton popular throughout but health and wellbeing becoming more popular as member age increases.

# Summary

This is now the third version of this report, and as the data set grows, the analysis grows more robust as we can include a larger and more thorough subset of public leisure facilities operating across the United Kingdom.

It is no surprise that there continues to be three activities that drive most of the footfall into leisure centres: swimming, group workouts and fitness (gym visits), which made up 81% of all visits over the last three years. As we have seen in previous years, swimming remains the single most frequent activity that people take part in. Whilst the majority of these visits represented general swimming sessions, in FY19 there was over one million visits each for Learn to Swim classes, adult-only swimming, fun sessions, school sessions, aqua classes and family swimming.

The popularity of swimming is driven mainly by non-members, with nearly two thirds of visits by this group for swimming. This contrasts with members, who swam on just over one quarter of all visits. For non-members, swimming offers an easy option for getting and staying active, with the many variants providing something for all ages.

Aside from these three activities, there are over fifty individual sports (or 'sport type' activities such as childrens programmes) that have taken place at leisure centres within the dataset. Football remains the most popular, and is increasing in relative popularity year on year. Again, this is driven by visits from non-members. New activities in the top five over the last two years are Health and Wellbeing activities, a category that encompasses assessments and consultations with staff, as well as GP referrals and nutrition sessions. In 2019 this made up more than one in twenty visits to centres, showing the important role they play in promoting and maintaining wellbeing.

Another specialist activity that is popular for older age groups is 50+ sessions. The changing exercise needs and habits of different age groups are reflected in the sports and activities that members choose at different life stages. Amongst members, badminton is a popular sport throughout all age groups, with squash more popular amongst younger age groups and health and wellbeing and bowls more frequently chosen by older members. Despite the broad spectrum of activities available across all age groups, the percentage of members in older age groups is still well down on the national population distribution. The average age of members is creeping up, with an increase of a year and a half to the current figures of 41 years and 2 months.

There has also been a small increase in the percentage of female members, up from 53% to 54%. There were some prominent differences in visit patterns between genders, with group workouts and fitness visits showing opposite trends. For females, the most frequent reason for visiting was group workouts, but for males this was fitness visits. Over three quarters of all visits for group workouts were from females. In terms of other activities, Childrens Programmes was in the top three sports/ sport types for two female age bands but did not feature in the top three of any male age groups. There was also a striking difference in when female and male visitors attended, with one third of female visits falling in the late morning slot, compared to 22% of male visits.

Across all visits, there were some clear 'peak' times, with a morning spike of visits at 9 and 10am, followed by a lunchtime lull and a second daily peak at 6pm. These three hourly slots each account for 10% of all visits across the three financial years. As seen previously, weekends are a quieter time, with 23% of all visits.

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