UK active
CONSUMER ENGAGEMENT

On the road to Vision 2030

Our Partners

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Foreword

As an industry we are acutely aware of the positive impact we can have on people's lives, through services, facilities and products that have significant benefits, driving local health outcomes, tackling inequalities and solving the nation's health crisis whilst reducing pressure on our NHS.

The people regularly accessing these services, facilities and products are also aware, through the commitment of our workforce to support them in reaping rewards on their mental, physical and social wellbeing.

So, the question is, how do we build on the momentum of those in the know and engage those that do not? To truly drive towards ukactive's Vision 2030 and see five million more people using gyms, pools and leisure centres. We must ensure the foundations of our focus is built on data and insight, to reflect how our sector can support the nation's wellbeing, tackle inequalities and reach new markets.

ukactive's Consumer Engagement work forms a key area of our sector intelligence, that when formed alongside operator data through **Private Sector Benchmarking** and Sport England's **Moving Communities** a comprehensive understanding of our sector can be developed to help inform the strategic adjustments to products, services and facilities – to better suit consumer needs. We know from ukactive's Private Sector Benchmarking that across 2022 and 2023 there was a 10.2% increase in members. From a public perspective, Sport England's Moving Communities will publish a 2023 report later this year, but preliminary data indicates year-on-year increases in participation. From this data we know memberships or participation in facilities is increasing, but what motivates people to attend and take part in activities, and what barriers still exist?

Foreword Cont.

The work aims to provide clear direction and focus on the barriers, motivations, perceptions and experiences of the consumer. Helping us get under the skin of those not engaging, to look at ways in which we can address the 'non-users' to turn them into long-term members of our sector. Whilst also retaining and deepening the connection of our existing users and members – giving them a reason to stay and become ambassadors for physical activity.

As we continue to build and grow this work, we aim to understand what people need, how they need it, how they are told it and how we engage them to lead physically active lifestyles to support their physical, mental and social wellbeing.

This report is built on five individual waves of polling data and aims to share what we know about the consumer so far.

With the continuation of this work, we will expand and strengthen our sector intelligence, share that knowledge and insight to identify key trends and tangible growth areas. **Enabling the sector to get more people, more active, more often and realise Vision 2030.**

Hattie Jones
Interim Director of Sector Development

Georgie Poole
Senior Head of Marketing, Events & Engagement

Vision 2030

In 2021 ukactive set out a shared ambition for growth – five million new people regularly using gyms, pools, and leisure centres on a regular basis by 2030. This is Vision 2030,

This growth would support the health and fitness needs of over 20% of the UK population – up from 15% penetration before the pandemic. By understanding the consumer, we can understand what and how we can reach those five million new people.

Mission

More people, more active, more often.

Objective

To help our members engage over 20% of the population by 2023

Purpose

To support, protect and inform our members.

To represent and champion our members

To help our members grow

Strategy

To help our members engage over 20% of the population by 2023

How we will achieve this via Consumer Engagement

Development of the sector to provide a more inclusive service

- Fully adopting consumer data and insights to inform decisions that engage a diversity of audiences
- New programmes and services that strive to make facilities as inclusive as possible
- Delivering insight-led, inclusive, and targeted campaigns to drive engagement in physical activity

Supported by:

- Our governance structure
- Our People

Informed by:

- Our membership
- Stakeholder engagement

Underpinned by our values:

- We are a community
- We care
- We are driven
- We empower
- We are progressive

Introduction & Background

The evidence for the role of physical activity in the prevention and management of numerous chronic diseases such as type 2 diabetes, obesity, heart disease, many types of cancer, MSK conditions, depression and anxiety, and dementia is well documented. However, with the increase in demand for treatment there is further pressure on the currently over-stretched NHS.

Getting the UK more physically active is critical for reducing pressure on the NHS and social services, and at the same time, improving the health of the workforce to grow our economy. Across the fitness and leisure sector there are a huge range of offerings available to support people to lead physically active lifestyles. Understanding consumer perceptions can help us to ensure the demand meets the need.

In the summer of 2022 ukactive announced its ambitions and plans to drive a specific consumer led area of work, to support the growth of the sector in the drive towards Vision 2030.

Consumer Engagement at ukactive is the regular interaction and relationship building with potential and existing fitness and leisure consumers. This is to observe behaviours, experiences and feelings of the consumer to generate insight required to lead proactive efforts to better understand an audience and facilitate their engagement.

Our decision to add consumer engagement to our portfolio of work followed on from the successful consumer-led insights in partnership with Sport England's, This Girl Can, which focussed on women and girls in relation to the gym, fitness and leisure sector. Which resulted in the guide – How to engage women and girls – as told by the 51%.

The insight discovered that personal safety is a real concern for women when considering being active in a facility. Which led to tangible measures and simple steps shown in the guide that operators can put in place to help tackle these concerns within facilities. This work has since developed into to a wider dedicated project 'Safer Spaces to Move', which is working to support both the workforce and consumers to feel safe, empowered and comfortable within our sectors facilities

This work demonstrated the value of understanding an audience and how that can lead to supportive development areas for the sector, with actionable tools to address or support barriers, motivators and perceptions for the end user.

Consumer Engagement also informs ukactive's wider key strategic areas such as equality, diversity and inclusion, digital transformation, growth through health, campaigns and political lobbying as well as operational and reputation risk and standards. The consumer work is helping to shape these areas of work, test ideas, thinking and best understand how we develop these areas to support the sector, in order to support the consumer.

Each wave of polling and headline data will be presented with context and background which will set the scene both from a sector and wider climate perspective, to help inform actions and next steps, to deliver tangible change.

Methodology

ukactive have been carrying out regular consumer polling, which has been conducted through market research specialists Savanta, with a UK nationally representative (based on age, region, gender, and social grade) minimum sample of 2,000 adults. We have defined respondents by their gym or leisure facility membership status into the following categories:

Current members: Currently hold a gym or leisure facility membership.

Former members: Have previously been a member of a gym or leisure facility but do not currently have a member.

Never been a member: Have never been a member of a gym or leisure facility.

The themes and questions were developed with the support of the Consumer Engagement Steering Group who helped set the direction of this work in its first year. The Consumer Engagement Steering Group consists of experts from across the sector including representation from public and private operators, industry insight experts and consumer consultants.

Each quarter a continued refinement and review of the on-going questions takes place, most questions remain the same to support the tracking of trends whilst exploring emerging areas. These emerging areas can be based on any of our key strategic areas to help inform specific areas of work, the environment in which are industry is operating in or areas that the nation and members of the public might be tackling, for example, the cost-of-living-crisis. To decide on what we include we review all the proposed question sets from experts within the team on their areas, assess relevance in accordance with emerging trends and seek support from the Steering Group, as required.

The broad themes explored, to track trends and emerging areas include:

- Current physical activity levels
- Gym membership status, length, usage and uptake
- Barriers and motivations for physical activity participation and membership at a gym or leisure centre
- Workplace physical activity opportunities and impact of avoiding sickness and work absence
- Leisure facility digital platform user experience
- What health means to consumers and how leisure facilities can support health conditions
- The impact of the cost-of-living crisis
- Environmental sustainability importance

Data reported within this report was collected across five waves of polling between September 2022 and January 2024. Data collection dates are:

- Wave 1 – 23rd – 26th September 2022
- Wave 2 – 17th – 20th March 2023
- Wave 3 – 13th – 17th July 2023
- Wave 4 – 22nd – 25th September 2023
- Wave 5 – 4th – 11th January 2024

Analysis of the data was conducted by the ukactive Research Institute. This report presents headline data trends across the data collected.

UK active RESEARCH INSTITUTE

Headline Findings

What are people taking part in?

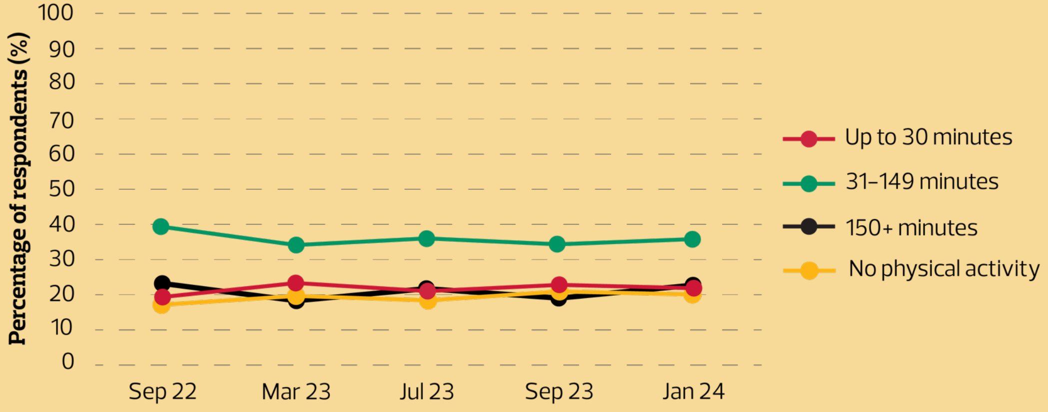
What are people taking part in?

The physical activity levels of the population sampled remained consistent from September 2022 through to January 2024 (Figure 1). However, compared to the most recent Active Lives survey (November 2022–2023) the Consumer Engagement sample has a lower proportion of active (150+ minutes of physical activity) individuals, and higher proportions of both fairly active (31–149 minutes of physical activity) and inactive (less than 30 minutes of physical activity) individuals.

Activity levels in the category 31–149 minutes were reported the highest, by the survey respondents. Those **achieving physical activity guidelines of 150 minutes were reported by an average of 21%** of respondents between September 2022 and January 2024.

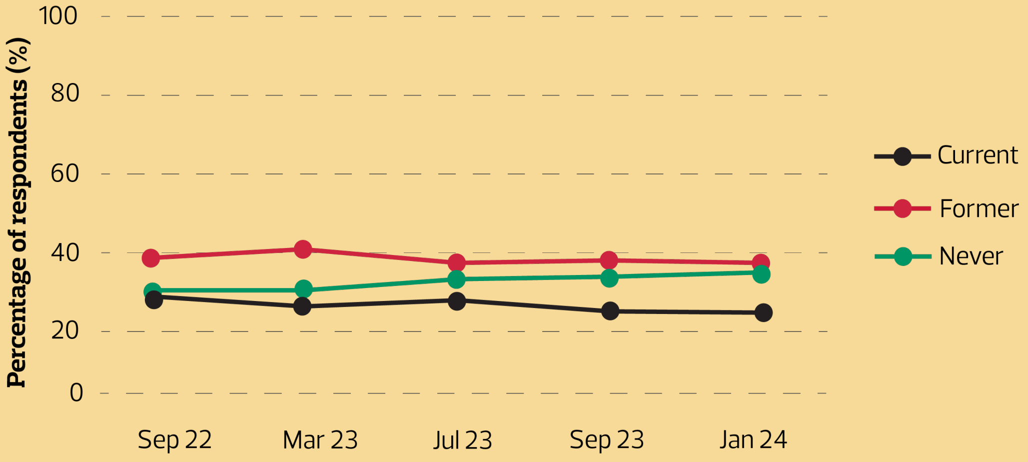
For gym membership status, there was a slight reduction in current gym members and an increase in people that had never been to a gym across from September 2022 to January 2024 (Figure 2). Former members peaked in March 2023, before levelling off. Those who reported being members of gyms also reported doing the most minutes of activity (figure 3.)

Fig. 1: **Physical activity levels**



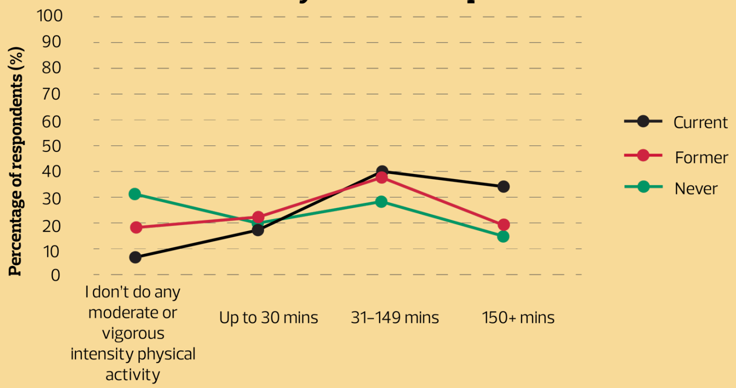
Minutes per week of physical activity reported by all survey respondents, at each time point.

Fig. 2: **Gym membership status**



Responses for all respondents, at each time point. Options include: currently a member of a health and fitness or leisure centre, former a member who has stopped/cancelled their membership or never been a member of a gym, fitness or leisure centre.

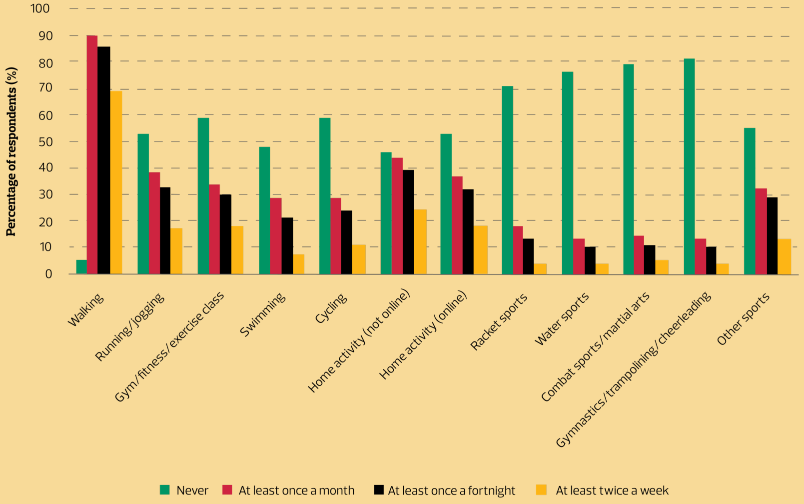
Fig. 3: **Physical activity minutes, per week, broken down by membership status**



Physical activity engagement displayed as minutes per week, for all respondents, broken down by gym membership status. This data is taken from wave 5 of polling (January 2024.)

All respondents were asked about activities that they take part in. Figure 4 provides an overview of the different types of activities respondents take part in and how often they do this. This data provides a snapshot from January 2024. Walking was the most popular activity participated in. Home activities both online and not online, as well as running, gym, fitness or exercise classes, and swimming were also the most participated in activities. Comparing the frequency of these activities to Sport England's Active Lives survey (which asks for participation twice in the last 28 days, equivalent to once a fortnight here), the latest Consumer Engagement survey showed higher proportions of respondents taking part in these activities. Home activities are not recorded in the Active Lives survey. This suggests that although activity levels of respondents across the Consumer Engagement surveys were lower than Active Lives, they participated in a range of activities below the 'active' threshold.

Fig. 4: **Activity participation frequency**



Results for all respondents taken from January 2024.

Interestingly, looking at the physical activity preferences for **former and those who have never been members** of a gym or leisure facility, **walking** is the standout favourite activity. Despite this, the level of respondents reporting walking at least once a fortnight does not greatly differ between those who are and are not members (an average of 89% for members vs 84% for non-members.) A larger difference is seen, however, when making comparisons between those who report doing activity at home, both online and not online. Although current members are still the biggest engagers in home activity, 42% of former members state they do home activity, compared to just 22% of never been members. The same difference is also seen when comparing home activity done online of former and never members (34% vs 14%.) This suggests that there is still an appetite for working out and being physically, particularly for former gym-members, but they are often utilising other methods for their workouts, outside of a gym-based setting, and exploring this is beneficial to tap into their physical activity engagement preferences.

Focusing on their participation in gym, fitness, and exercise classes there is consistent attendance from September 2022 to September 2023 (Figure 5). However, in January 2024 there was an increase in people never taking part in this activity within the sample. This coincided with slight reductions for attendance both once a month and once a fortnight. There also is only a small difference between those that undertake these activities once a month and once a fortnight.

Compared to **Active Lives** which asks for participation twice in the last 28 days (equivalent to once a fortnight reported here), fitness activities are taken part in by 28.7% of individuals (an increase of 1.5% points in 12-months). Average participation in gym, fitness or exercise classes across the timepoints was 31%, slightly higher than Active Lives data.

Fig. 5: **Gym/fitness/exercise class frequency across all respondents**

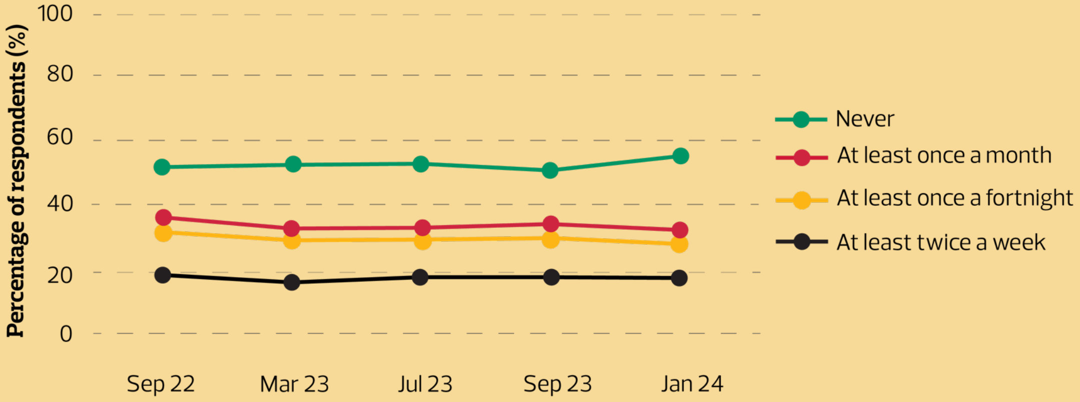
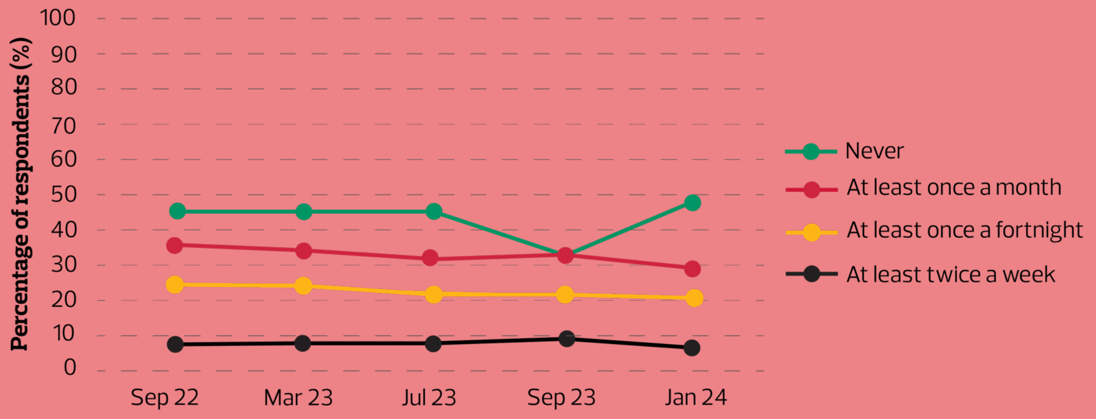


Fig. 6: **Swimming frequency across all respondents**



For swimming there are small variations in the people responding except for September 2023 (Figure 6). At this point we saw a large drop in the proportion of the sample having never participated in swimming, before increasing to a slightly higher percentage than the previous time points. This coincided with a reduction in the sample swimming at least once a month and twice a week.

Motivations

What motivates people to be a member of a gym or leisure facility?

To understand why people are members of a gym or leisure facility, we asked those with a current gym membership for all the reasons that motivated them. Whilst there are a range of motivations, Figure 7 shows the top five motivations over the Consumer Engagement surveys.

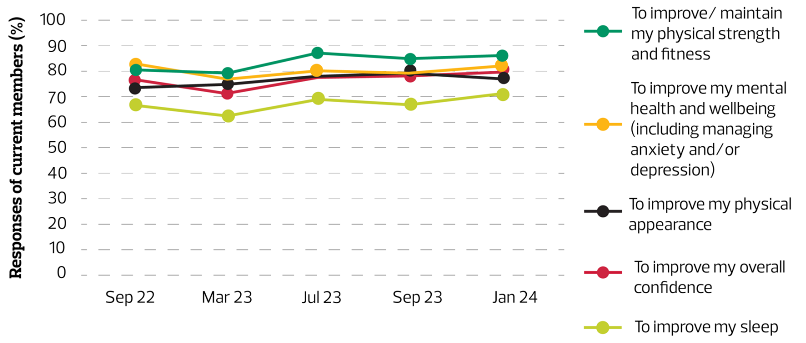
The key reasons for current members were **to improve or maintain either their physical strength and fitness** or their **mental health** and **wellbeing**, alongside **improving confidence, physical appearance**, and **sleep quality**.

These trends show that although physical motivations are highest, **gym and leisure facilities play an important role in supporting the mental health of current gym members**. The lowest motivations selected were to make new friends (46%) or for an important event such as a wedding, or holiday (43%).

It is clear from these motivations that people are starting to feel the wider benefits to being physically active and the role facilities in their communities play in looking after their overall health and wellbeing. These motivations are key messages we can promote to those who are not physically active to demonstrate the value and role on leading an active lifestyle on wider health outcomes.

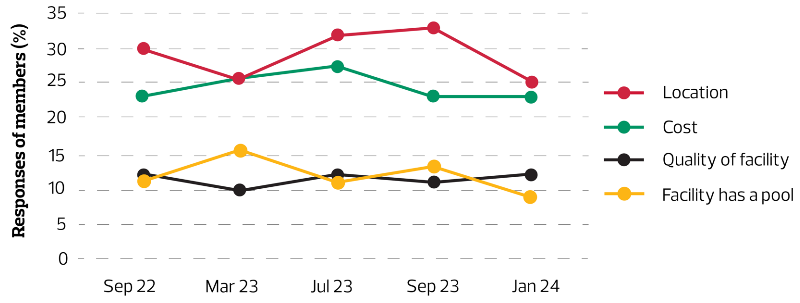
Focusing in on the specific facility that a gym or leisure facility member attends, we asked for the main reason they joined that specific facility (Figure 8). The location was the main reason across the time points, with cost also an important factor. The quality of the facility through a variety of weights and machines, as well as pool access were the other two popular main reasons. Of lesser importance for members, the lowest reasons provided for selecting a particular facility included the staff (6%), recommendations from someone else (6%), additional facilities such as creche, café (6%) and access to online content (3%).

Fig. 7 **Top five motivations for current members to have a gym/leisure facility membership**



Responses provided by respondents who are currently a member of a gym, health, or leisure facilities, at each time point.

Fig. 8 **Reasons of importance in decisions to join the specific facility of current members**



Responses provided by respondents who are currently a member of a gym, health, or leisure facilities, at each time point.

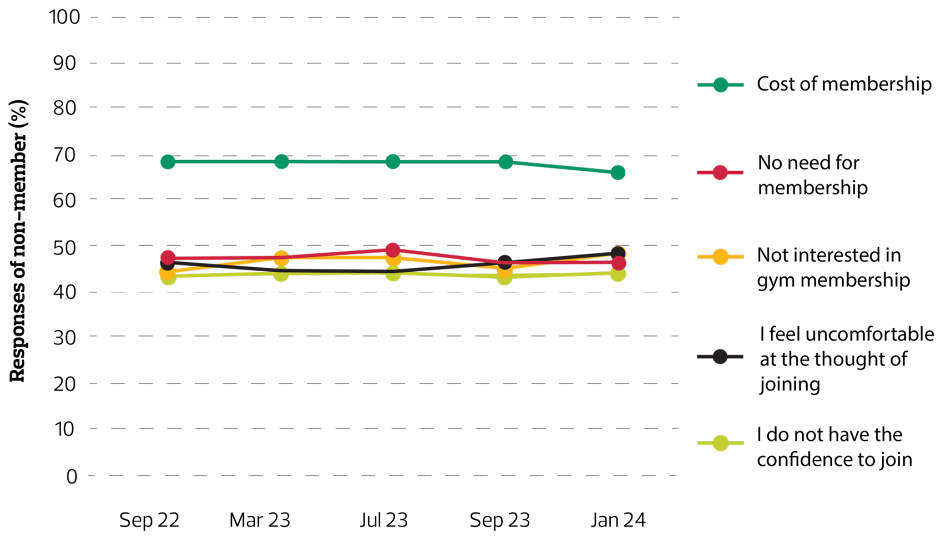
Barriers

What barriers do people face when joining a gym or leisure centre?

To understand the barriers towards gym and leisure facility membership, those who were 'former members' or had 'never been a member' were asked to select barriers they faced to understand why they do not have a membership. **Cost of membership** was the most selected barrier consistently across the time points, with a slight reduction in the most recent poll (Figure 9). Of the other top five barriers, the other options were selected to a similar degree to each other and have remained consistent over time.

These reasons were **not needing or being interested in a membership**, a **lack of confidence** and **feeling uncomfortable at a gym or leisure facility**.

Fig. 9 **Top five barriers to joining a gym/leisure facility**

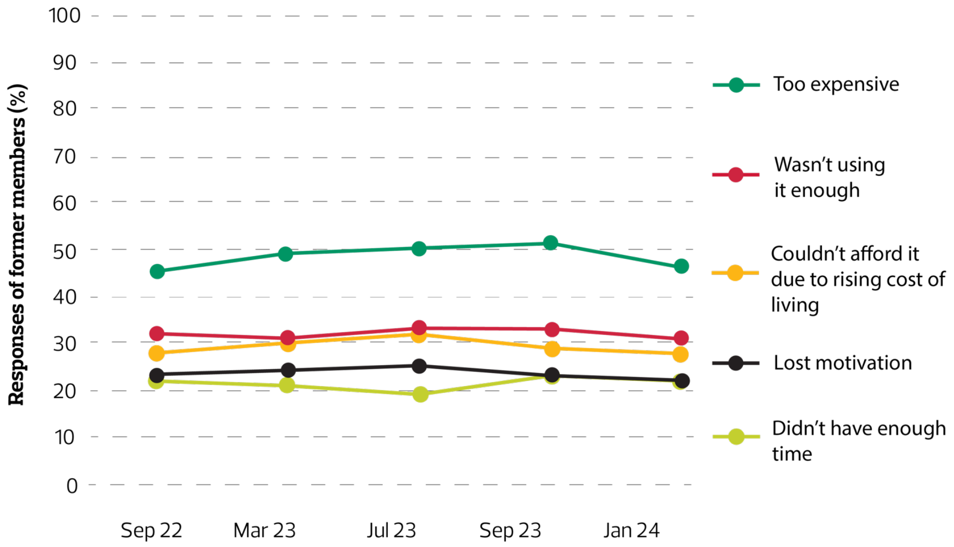


Responses provided by respondents who are non-members (former or never) of a gym, health, or leisure facilities, at each time point.

The least selected barriers across the time points focused on gyms or leisure facilities not providing the right things for consumers (19%), consumers feeling unsafe in or around a gym or leisure facility (14%), and not knowing where their local facility is (14%). Although these barriers were least selected, they still represent barriers for consumers and are important areas for improvement and areas the fitness and leisure sector should look to improve. An example of how the sector is working to combat consumers feeling unsafe is through the 'Safer Spaces to Move' project. This looks to address and support the sector to ensure facilities are welcoming to women and girls, in its early stages, this project is already seeing great impact through the latest pilot schemes and the tangible learnings can help support beyond this direct audience group.

Focusing specifically on the main reason that former members ended their membership could aid with member retention. Cost was again the main reason (Figure 10) and has increased as the main reason at each time point but saw a similar reduction in January 2024, compared to cost in the top five barriers, and then returns to a similar level to September 2022. The impact of rising cost-of-living pressures on consumer disposable income was the third most select reason barrier that increased from September 2022 to July 2023 but has since reduced suggesting cost-of-living pressures may be easing, especially when matched with the membership cost decline also present. Not using the membership enough was the second most selected reason for ending a membership, with lost motivation fourth most selected suggesting that following initial use and engagement with gyms or leisure facilities, behaviours changed leading to the cancellation.

Fig. 10 **Top five factors which contributed to ending membership**



Responses provided by respondents who are former members of a gym, health, or leisure facilities at each time point.

Similarly, not having enough time was the fifth most selected reasons for ending a membership suggesting gym or leisure facility memberships were ended when competing priorities were felt by consumers. Not having enough time appears to be lowest in the July summer month, whereas in contrast, lost motivation is at its highest. This coincides with the school summer holiday period where additional time pressures due to childcare and family commitments may be at play. Exploring reasons for these findings may help understand solutions that could be put in place, such as supporting children to attend a facility alongside parents or carers, family workout classes as part of holiday timetables where appropriate and even looking at the timetabling of classes or activities to support these to happen when it might be easier for people to attend or reducing the length of classes to make them more manageable alongside other commitments at this time

The least selected reasons for ended a membership were menopause, being pre-postnatal, and developed Long-COVID (all 3%). Again, although these are least selected looking at strategies to support individuals can ensure everyone is supported within gym and leisure facilities.

Long term health conditions

How can the sector can support people with long-term health conditions?

As is embedded in ukactive's Business Plan for 2024-2025, there is a clear drive across the sector for 'growth through health' and our sectors current role and the potential, and essential, growth of our sector through health. Due to this clear prioritisation, questions were added to the latest polling (January 2024) to understand consumer perceptions and understanding of health in a broader connection of the nation's health and our sector.

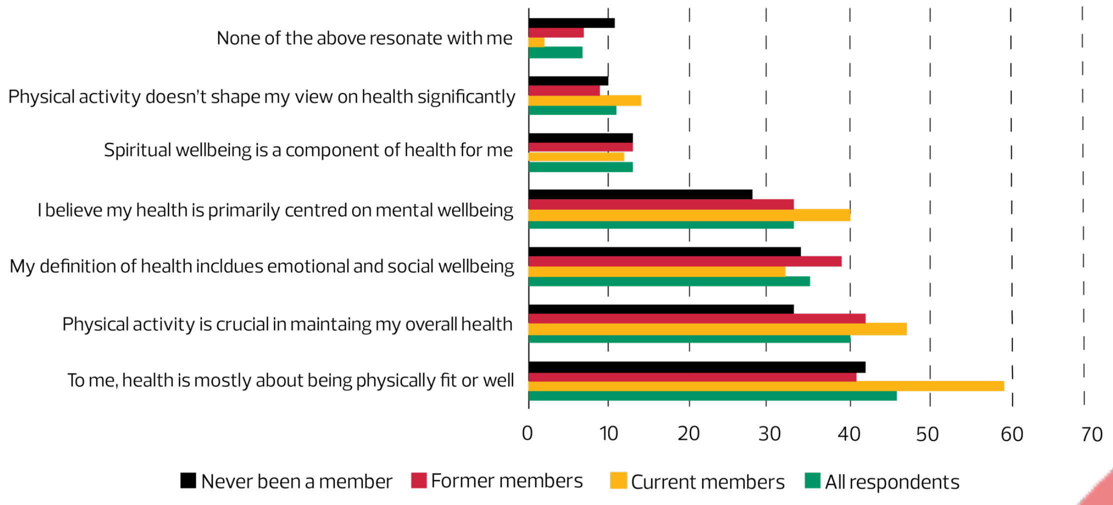
With the potential role physical activity can have on the overall health of the population, we wanted to understand what health meant to consumers, in particular members and non-members of gyms and fitness facilities. Because these were only introduced in January 2024 the following data provides a single time point understanding.

For all respondents being physical fit and well was what health meant to them, however emotional and social wellbeing and mental wellbeing were also important (Figure 11).

For current members there was a greater difference between their health being mostly about being physically fit and well compared to emotional and social wellbeing, and mental wellbeing.

Whereas for never and former members this difference was not as great.

Fig. 11 **Responses to the question: When it comes to your understanding of health, which of the following statements resonates with you?**



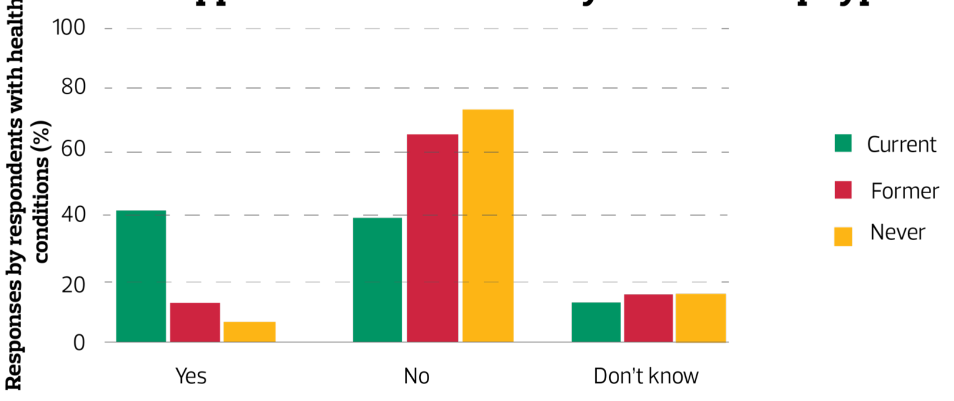
Responses provided by all respondents and also split based on their membership status. January 2024.

In January 2024, respondents with a health condition were asked for their awareness of any programmes at their local gym or leisure centre that would help to support their health condition. In total, 17% of respondents with a health condition were aware, with **68% unaware** and 15% did not know. Figure 12 shows the awareness of these programme, split by membership type.

Unsurprisingly, there was a much greater awareness of offerings by those who were current members, and a lack of awareness by non-members, particularly those who had never been a member of a gym or leisure facility, findings supported by ukactive's MSK Hubs project.

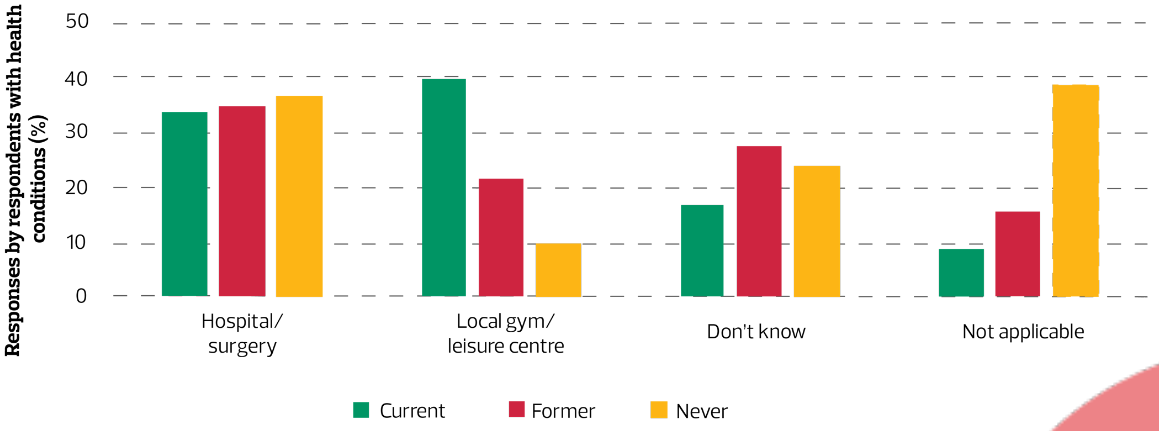
A further question was asked to those with health conditions to understand where they would prefer to receive support for their health condition. Overall, 35% stated this would be at a hospital and 21% stated at a local gym or leisure centre. **Breaking this down by gym membership status demonstrates a preference for receiving support at a gym or leisure centre was favoured by current gym members** (Figure 13), suggesting current gym members understand the benefits gyms and leisure centres can provide for those with long-term health conditions. Although this is only the first wave of this enquiry, we believe that there is likely to be some further work to be done around the perception of health and the role our sector can play in creating a healthier nation.

Fig. 12 **Awareness of programmes at local gym or leisure centre to support health condition by membership type**



Responses provided by respondents who stated they had a health condition, split by membership type. January 2024.

Fig. 13 **Location preference to receive support for health condition**



Responses provided by respondents with a health condition, split by membership status. January 2024.

What have we learnt?

In this first ukactive Consumer Engagement report covering trends from September 2022 to January 2024, it provides us with an enriched understanding of consumer habits related to gym and leisure facility interactions.

The data tracked across the five waves reveals consistent activity levels across the samples, although indicates a more inactive population than the Active Lives Survey, with slight variations in frequency in activities participated and swimming.

Trend data across timepoints, appears to suggest there is a slight decrease in current members, but increase in never been members in the sample. Exploring the top reasons behind gym membership cancelations, according to former members, will likely provide useful insights into why people are making the decision to no longer have a membership

1. Cost of membership
2. No need for membership
3. Not interested in gym membership
4. I feel uncomfortable at the through of joining a gym / leisure facility
5. I do not have the confidence to join a gym / leisure facility

Moving forward, putting in mitigations behind these reasons could help retain members. These include cost, motivation, and time. Mitigations could include flexible price plans and enhancing motivation by offering loyalty points and schemes for regularly attendance. Furthermore, exploring barriers to gym membership is useful for understanding and exploring solutions to taking out a membership.

For current members, the top motivations for having a gym membership show that mental, as well as physical health is held in importance. Acknowledging and harnessing this could help find way to encourage and prompt new, non-members to take out a membership.

Key Learnings

The top motivations have remained consistent to date. Understanding and acknowledging this across current gym members allows for strategies to be put in place to support current members with these motivations through retention strategies. Motivators to focus on:

1. Improve or maintain physical strength and fitness.
2. Improve mental health and wellbeing.
3. Improving physical appearance.
4. Improve overall confidence.
5. Improve sleep quality.

Whilst some of these may seem obvious to us working in this industry, highlighting the basics, and bringing to life these motivations to existing members and non-members could enhance how they engage with services and facilities. Encouraging them to explore new products or the frequency in which the engage.

Understanding and providing a more flexible approach in how and where people can engage with their facility can be seen through use of both online and in-facility classes.

The not-so-new dawn of online classes has allowed greater flexibility in when and where people participate and providing this variability is key to adjusting to the consumers' ever-flexible schedule.

There is an opportunity here to re-engage those who were previously members but who have lost motivation and therefore do not use their membership enough.

Although this report outlines some of these reasons, motivation is incredibly personal and so understanding the more nuanced reasons for lacking motivation and not using facilities might support more targeted campaigns to encourage re-joining.

Conversely, our data shows us what non-members feel are the biggest reasons they do not hold a membership at a gym or leisure facility. Strategies to break down these barriers and showcase the breadth of support provided across the sector could help to engage more people in activities and services within facilities. Key barriers to explore:

- Cost of membership (it is important to consider this within the wider societal context of the ongoing cost of living crisis and understanding where membership factors into the consumer's priorities, as well as the value consumers feel they receive for the cost).
- Feeling uncomfortable at a gym or leisure facility.
- Lack of confidence to join a gym or leisure facility.

The work of our Safer Spaces to Move project has guidance to support women and girls, in particular, in feeling more comfortable in gym and leisure environments. This guidance includes recommendations such as: raising awareness of existing codes of conduct and offering a robust reporting process.

While this is specific to this audience, there is content within this guidance that is translatable for wider audiences that may experience these feelings and are letting this hold them back from engaging with our sector. Details on this guidance can be found here.

Feeling uncomfortable and a lack of confidence are specific barriers to non-members. Understanding how people are welcomed and introduced, how our facilities, services and products are positioned may help reduce these barriers. Creating virtual tours of facilities and offering whilst also ensuring a quality digital user journey may be the first step in building someone's confidence in beginning their journey to becoming a member.

The sector has a huge role to play in supporting the health of the nation. The data in our consumer engagement suggests that those with health conditions are unaware of how the sector can support them through the availability of offerings.

Continued showcasing of the range of different way the sector can support could help break these barriers down, from specific condition interventions through to low-cost access to facilities. Achieving this on a consumer level is needed as well as a healthcare perspective. More widely there is the opportunity for the to change perceptions around how the consumer views physical health in relation to their wider, holistic understanding of health.

Further analysis will look at the data presented here to understand who is experiencing the barriers, motivations, or taking part in specific activities.

Next Steps

With this benchmark of trends set through this initial report from our Consumer Engagement work, we will continue to gather data through quarterly polling and analysis after each wave.

This quarterly polling will continue to deepen our understanding of the consumer and allow us to dive into emerging trends to present back to the sector, tangible recommendations on how we can encourage retention and drive more people to engage and benefit from our sector resulting in more people, more active, more often.

We will be diving deeper into the consumer perceptions of health in quarter three of this financial year after further waves of polling to gain greater insight of how the sector can influence the nation's wider health.

We will also be looking at ways in which we can build partnerships and strategic alignment in consumer data to provide more detail across the trends and insights we identify, building further sector intelligence.

If you would like to discuss potential partnerships in this space, please reach out to Hattie Jones at: harriettjones@ukactive.org.uk

We'd love your feedback

Please use the QR code below or the link **here** to provide feedback to support the development of this area of work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