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DIGITAL FUTURES 2024

The fourth annual review of the digital maturity and effectiveness of the UK's fitness, leisure and sport sector.

Digital Futures Core Strategic Partner Group

Gladstone EGYM TECHNOGYM

Contents

The Digital Futures programme has been designed by the fitness, leisure and sport sector for the audiences it serves. It would not be possible without all those organisations who have participated in this consultation and the support and thought leadership of the Digital Futures Advisory Group. The advisory group represented by the partner organisations below looks to build a digital transformation programme built by the sector for the sector and are willing to collaborate, challenge ideas alongside sector leisure operators to provide guidance. Special thanks to the 295 fitness and leisure operators who have taken part in Digital Futures over the years.

Digital Strategic Partners

Gladstone EGYM TECHNOGYM

Digital Contributor Partners

LeisureLabs PerfectGym keepme ZOOM MEDIA EZ ENDURANCE ZONE

Foreword

ukactive members and partners in the fitness, leisure and sport industry are transforming lives through their dedication to supporting wellbeing. Digital services provide the opportunity to advance support in many ways, not least through improved engagement with customers, and stronger relationships with partners. In our work across the healthcare sector it is clear that both are needed if we are to embrace the full potential of physical activity to maintain health in our communities. This takes time, and the continued focus on embracing digital transformation by the sector, as represented in this fourth annual report, is to be commended.

Meanwhile, it is critical to ensure any shift to digital doesn't exclude individuals or groups of people. It is crucial for everyone involved to maintain a focus on who might be excluded and continue efforts to connect and support in different, non-digital ways.

It is right to celebrate achievements so far, while also acknowledging that there is more to be done. The calls for interoperability and the continued focus on digital will help to maintain momentum and support the three shifts that will be at the centre of the forthcoming 10-year plan for the NHS:

- Shift 1 – moving more care from hospitals to communities
- Shift 2 – making better use of technology in health and care
- Shift 3 – focussing on preventing sickness, not just treating it

NHS Horizons' purpose is to amplify the efforts of others to deliver transformation and large-scale improvement, and to accelerate new change thinking in line with the priorities of the NHS. We look forward to working alongside our partners in the fitness, leisure and sport sector to achieve this Government's priorities in health provision.

Sasha Karakusevic
Associate NHS Horizons

"Data-driven healthcare, powered by innovative technologies has the potential to revolutionise the way we approach health and wellness. By harnessing the power of data, our industry can identify trends, predict outcomes, and deliver personalised interventions. This data-centric approach can help reduce the burden on the NHS, improve patient outcomes, and promote a healthier population and a more productive workforce."

Tanya Hall – UK Strategic Partnership & Tender Manager – EGYM

Executive Summary

This report, now into its fourth reporting period, examines digital maturity and effectiveness in the UK fitness, leisure and sport sector in 2024. It draws on past reporting years to show how the sector is embracing digital and what needs to be done to build our digital future. In this report, we highlight how fitness, leisure and sport organisations are integrating digital technologies, while identifying gaps, and providing actionable insights for improving digital strategies. The report is aimed at leadership and digital teams of all sizes, and across the many representative facilities in the sector, offering evidence and guidance on enhancing their digital journey.

Four years ago the sector didn't have a baseline on its digital maturity – by adapting the Digital Futures approach, reflecting on what we are learning each year, we are now at a place where we can see clear trends and focus areas for the future, thanks to the input of 295 organisations across the sector. This year's report shares these, and we continue to welcome feedback to help us shape where Digital Futures goes next.

"Digital Futures is an important initiative for the sector. The world is changing rapidly, and we need to ensure that our sector keeps up with changing customer demands and expectations. As a business, we have leveraged digital technologies to improve our customer experience and operational effectiveness. Digital Futures has allowed a tool for benchmarking and a growing collaborative approach to improving the sector from a digital perspective."

Matt Bowsher, IT Delivery Manager, Parkwood Leisure

Consultation overview

The digital consultation was conducted with UK fitness and leisure operators, National Governing Bodies (NGBs) for sport, Active Partnerships, sports clubs and other physical activity organisations between June and August 2024. Each participant completed an online survey answering questions across five digital measures, which provided a benchmarkable maturity and effectiveness score. Full methodology and approach can be found later in the report. The consultation was designed and conducted by an external agency, Rewrite Digital.

Workshop Insights

To build this report, we consult with many members of the fitness, leisure and sport community, culminating in a workshop session where we analyse the findings. This session, incorporating a range of fitness, leisure and sport organisations both big and small, and suppliers working in the sector, many of whom are deeply experienced in implementing digital measures throughout the sector, is an important sense-checking activity, providing analysis to support (or negate) the findings. The session is run on a 'Chatham House Rules' basis, meaning that individuals won't be named, but their insights are used throughout the report in order to provide a rich understanding of the context in which the data sits. For the first time since launching the Digital Futures Report in 2021, we are building on these insights to deliver additional actionable guidance based on the reports key findings. Throughout the report, we will refer to this insight as coming from 'the panel'.

Definition of digital

As part of the consultation design process with stakeholders, a definition of digital and its interpretation was required because digital can mean different things to different people, not to mention how it is used within different departments. For the purposes of this review, the following definition of digital has been used and was conveyed to all participants in advance of completing the consultation:

Digital: The use of technology and data to meet raised consumer expectations and drive innovation, actionable insights and value across:

- Capabilities and culture
- Processes and systems
- Services and experiences (online, in-venue and in the community)

It was acknowledged that the digital measures being assessed require a representative view from many departments and at board-level for strategy oversight, so all survey respondents were asked to engage with all areas of the business where digital is used before submitting their response.

Summary of the key findings

- **Overall Digital Maturity:** Digital maturity and effectiveness scores for the sector have improved, with an average score of **51%**, a **4%** increase from 2023. Returning participants in the Digital Futures programme known as the Digital Futures cohort group scored higher (**55%**), especially those involved for four years or more (**66%**). This supports Digital Futures aim of providing a starting framework to support transformation. An interesting finding this year is that organisations with 6-10 locations have seen a **13%** uplift in scores, demonstrating that even with fewer resources, smaller organisations can benefit from greater agility.

- **Data and Insights:** The largest improvement was seen in data and insights, which rose by **5%** after a decline in 2023. This suggests increased value from the importance of data and insight capabilities, data standards, data security and appropriate infrastructure, knowing that our data sources are only going to grow due to emerging technology.

- **Transition to the cloud: 68%** of organisations now use cloud-based Leisure Management Systems (LMS), with **100%** considering updates or changes within the next 12 months. This is a critical area of focus to ensure decision making is centred on positive customer experiences alongside commercial long-term value. Moving from on-site hosted systems to cloud-based solutions, and eventually to full Software-as-a-Service (SaaS), offers many benefits - such as scalability, cost efficiency, supporting Cyber Essentials accreditation and innovation. Transitioning to the cloud also presents several challenges across technical, operational, and cultural aspects that organisations must navigate.

- **Sustainability and Environmental Impact:** There has been a significant rise in the focus on sustainability, with the shift from making policy statements to demonstrating real, actionable changes to reduce environmental impact. This is an interesting new question introduced in 2023, which through time will provide actionable insights.

- **Virtual Experiences:** Virtual services, including online classes, have seen a **16%** decline. This reflects a shift away from the demand surge during the pandemic, however, a blended approach to provide both physical and virtual experiences is a key consideration, and it reinforces the importance of understanding your customers' needs and to design experiences to meet them.

- **Digital Strategy:** The report shows that digital strategy scores have seen the highest growth of all measures between 2021–24, with a **63%** increase. However, **36%** of organisations still lack a formal digital strategy.

- **Repeat Performance:** The Digital Futures Cohort, consisting of organisations that have participated for two or more years, showed consistent improvement. Those involved for four years achieved the highest growth, with a **4%** improvement compared to 2023.

- **System Interoperability:** A major challenge identified is the lack of compatibility between different digital systems, particularly older legacy software. This limits efficiency and hinders digital innovation especially as we move to health-based integration. The sector recognises this and is working towards this goal.

- **Use of Open Data:** Open Data continues to grow in awareness and value, especially amongst the Digital Futures cohort group, who have the infrastructure and skills needed to use it to reduce inequalities in access to physical activity. Sharing data in a standardised format known as Open Data allows developers and other organisations to create applications that encourage more inclusive and diverse participation. The Digital Futures cohort group use of open data is higher than the sector average (**+12%** for those participating for +2 years, to **+40%** use by +4 years cohort participation). Open Data initiatives such as OpenActive in leisure and Open Referral, supporting social prescribing and health pathways, are critical to our success and will require the sector's support.

Recommendations

Focus on Digital Strategy

Organisations are encouraged to develop a comprehensive digital strategy aligned with their overall business goals. Only **18%** of 2024 participants have an updated and ambitious digital strategy. It is encouraged that this should be a priority, as others have done since Digital Futures' inception with **63%** of participating organisations now having a comprehensive strategy. Once completed, ensure it's a live working document to maximise opportunities to gather data and insights to inform both operational and consumer needs. This will support the increased emphasis on growing revenue from digital that organisations identified as a key priority in the next 12 months.

Leverage Data and Insights

Greater emphasis should be placed on harnessing data to drive business decisions and improve customer experiences. A connected data strategy aligned to your digital strategy which informs your overall business goals will allow consistent value generation.

Conclusion

The 2024 Digital Futures Report demonstrates steady progress in digital adoption within the fitness, leisure and sport sector, with organisations seeing tangible benefits from cloud-based systems, data insights, and sustainability efforts. However, gaps remain in digital strategy and system integration, and addressing these will be crucial for maintaining momentum and achieving secure growth and stability into the future.

David Gerrish
Strategic Lead Digital
ukactive

Introduction

Digital Futures is an inclusive initiative for the fitness, leisure, and sport sector in the UK, overseen by the Digital Futures Steering Group and Advisory members. Our research is conducted to identify the digital gaps in the sector and to support organisations to start, improve and maintain their ongoing digital strategy and journey. We welcome any size of fitness, leisure or sport organisation – whether boutique gym, multi-site independent, public leisure facility or sports activity provider – to participate in the research, and we produce this report to inform their leadership and digital functions. As is demonstrated in the findings, being a part of the Digital Futures initiative in itself is beneficial in maintaining momentum for digital advancements. This report is for anyone who seeks to benefit from digital improvements within their fitness, leisure and sport operation, providing evidence of the benefits of implementing a digital strategy, and some advice on how best to do it.

Creating fulfilling experiences that provide value-for-money and services that are optimised for efficiencies is key to the sector's survival and growth. Digital is at the heart of enabling this, and this is why our Digital Futures work exists.

This report gives a measure of how the fitness, leisure and sport sector is embracing digital in 2024 and what needs to be done next to build our digital future.

Digital Futures, formed in 2021, is a multi-year programme with the aim of improving the application of digital to enhance consumer experiences and value to operators and suppliers of digital services.

Findings

Participation and representation

Fewer respondents than last year

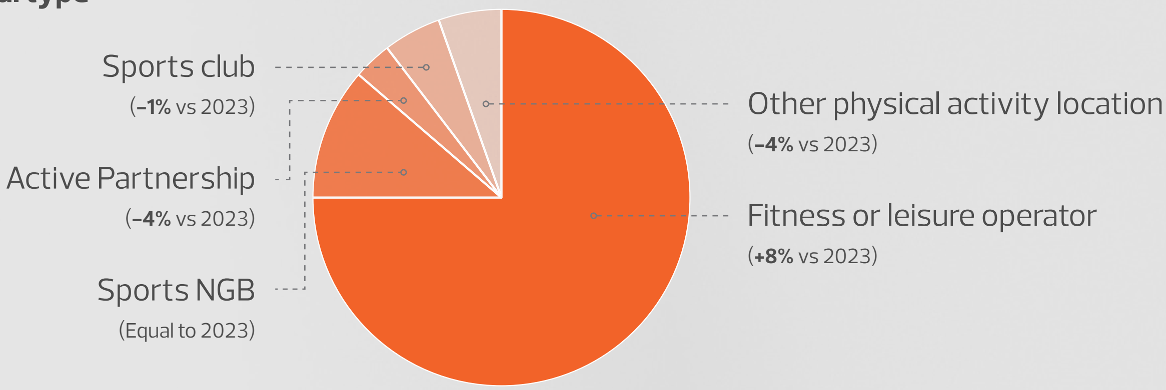
This year saw a drop in participation, with **117** eligible UK fitness, leisure and sport organisations completing the online survey (compared to 204 in 2023). These organisations represent **1,600** sites and around **4 million** members nationwide.

Since 2021 there have been **295** UK organisations participating in Digital Futures.

"Digital takes time. In the space of a year, potentially you haven't then had the opportunity to do full reflection, align strategic management, get the budgets in place, work with your suppliers, and get your discovery phases complete to then move forward."

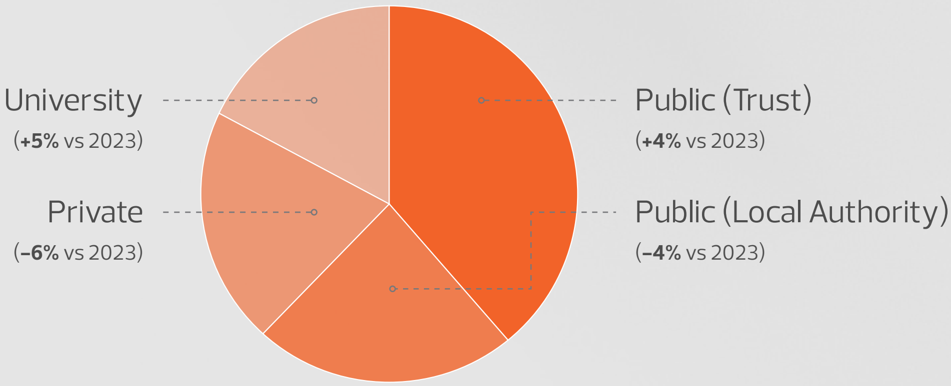
Digital Futures Panel Member

Organisational type



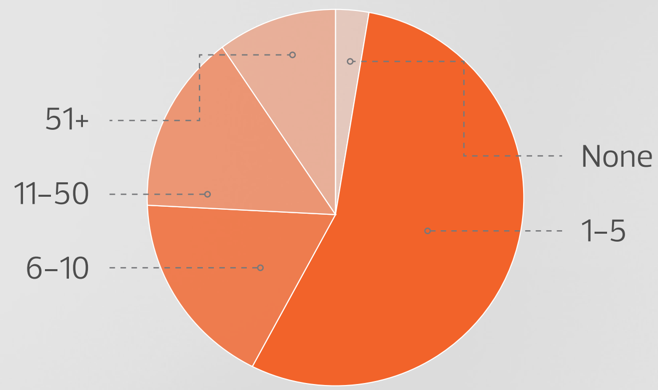
UK participants (n=117)

Fitness & leisure segments



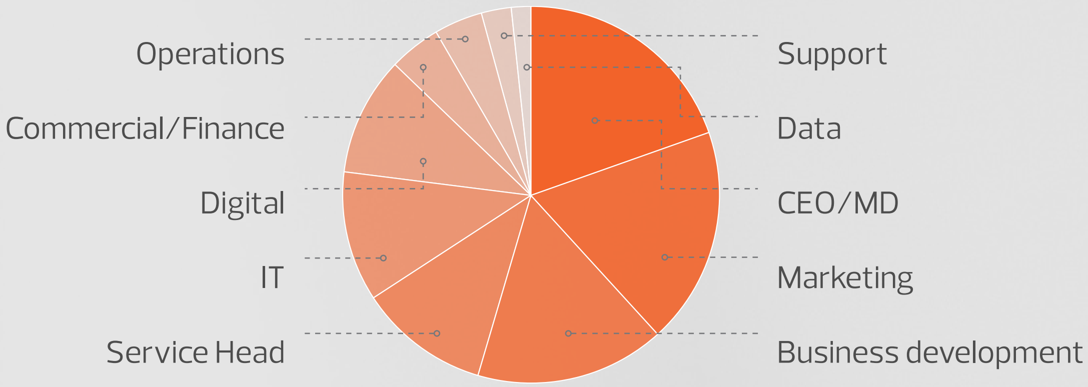
UK fitness & leisure operators (n=88)

Number of physical venues



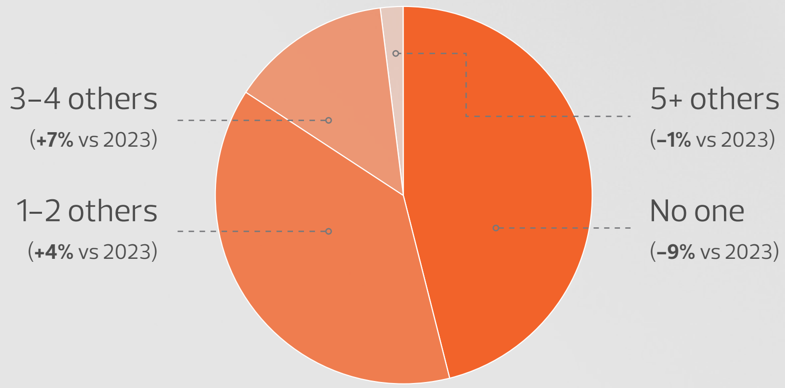
UK participants (n=117)

Roles



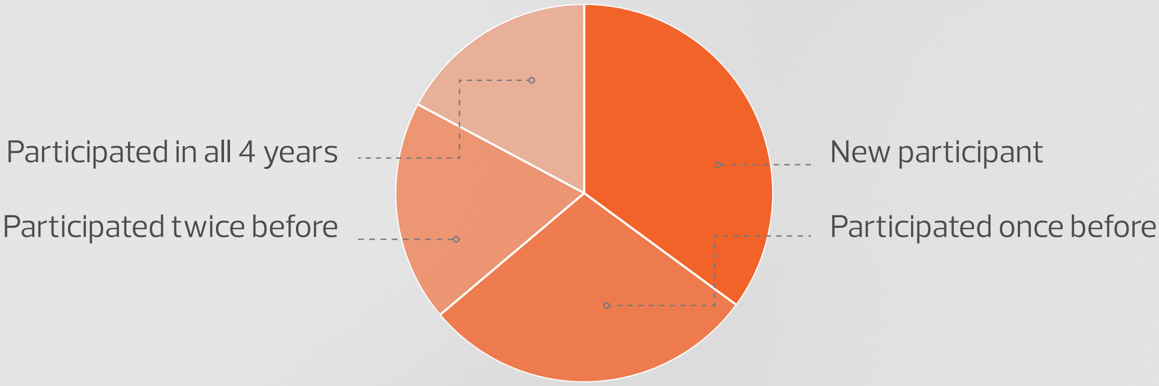
UK participants (n=117)

People consulted



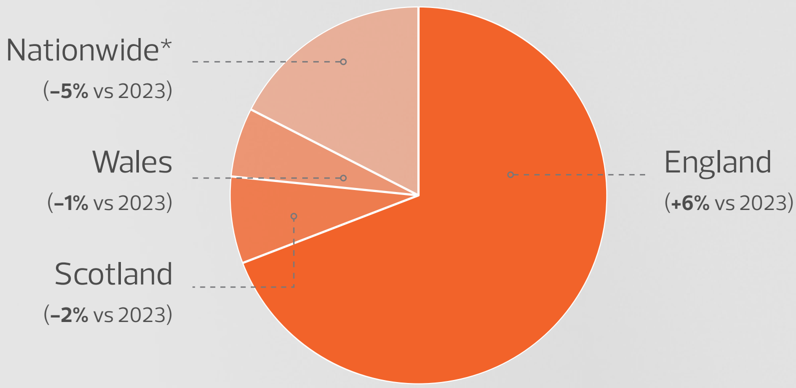
UK participants (n=117)

Previous participation



UK participants (n=117)

Country location(s)



UK participants (n=117)

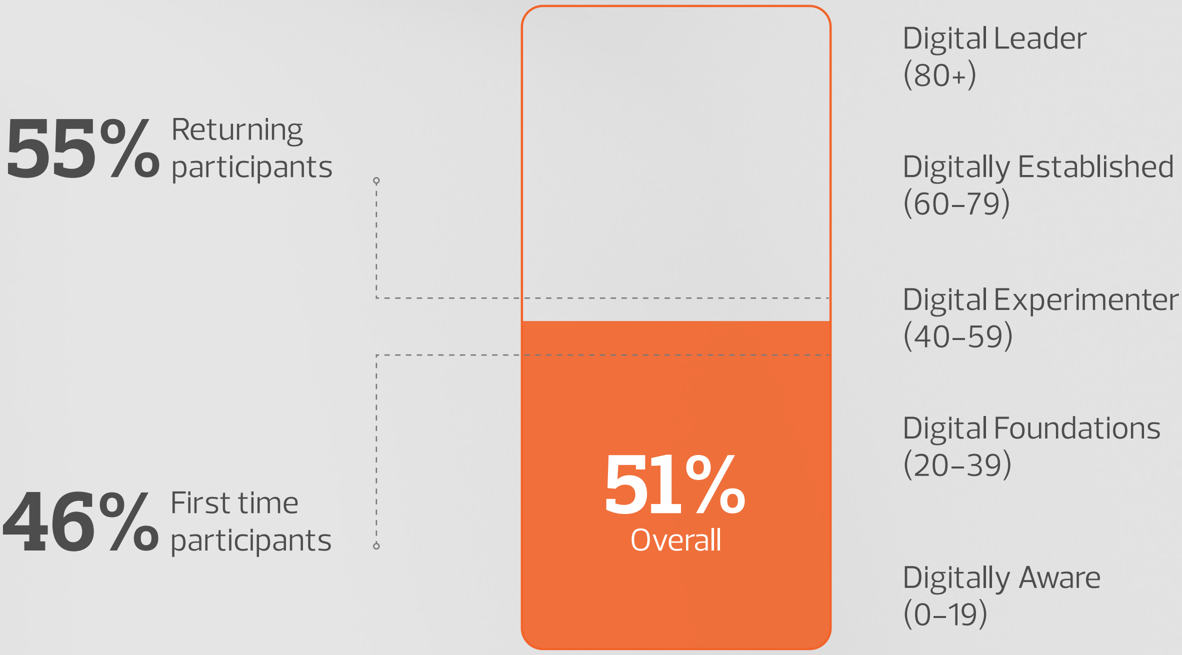
Overall scores

Scores rise as digital gets embedded

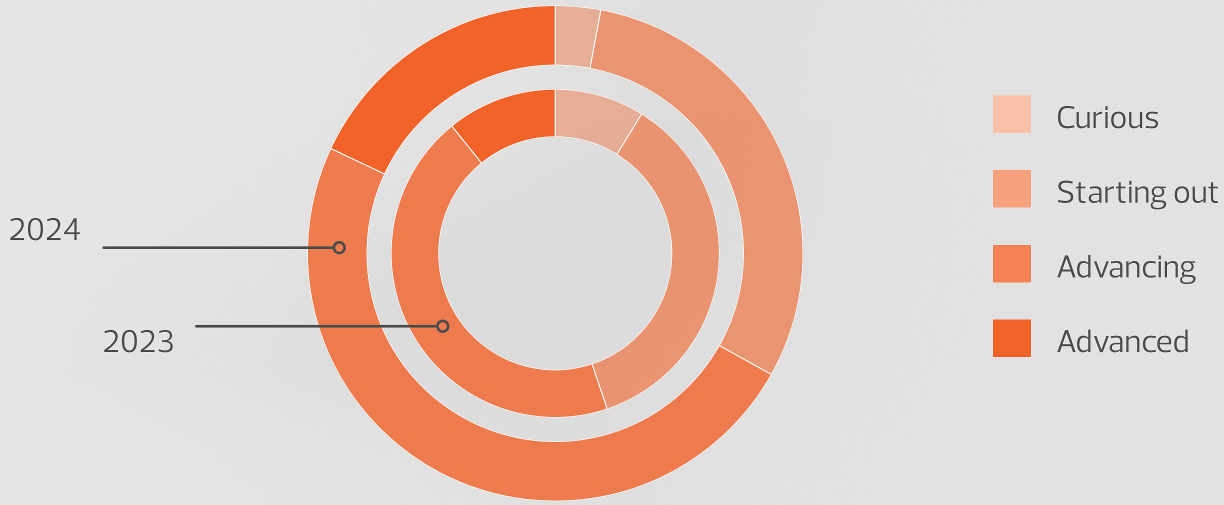
Overall, the surveyed UK organisations averaged a **51%** score for digital maturity and effectiveness, **+4%** vs 2023. Fitness, leisure and sport organisations averaged a **55%** score, again **+4%** vs 2023.

This once again puts the sector at the **Digital Experimenter** level (**40–59%** range) overall which represents those organisations already making some great advances in digital. Through committed and ongoing investment in digital from the top, these organisations will accelerate business performance and put them ahead of peers.

Those completing for the first time scored an average **46%**, compared to those returning scoring **55%** (**+2%** on their previous score).

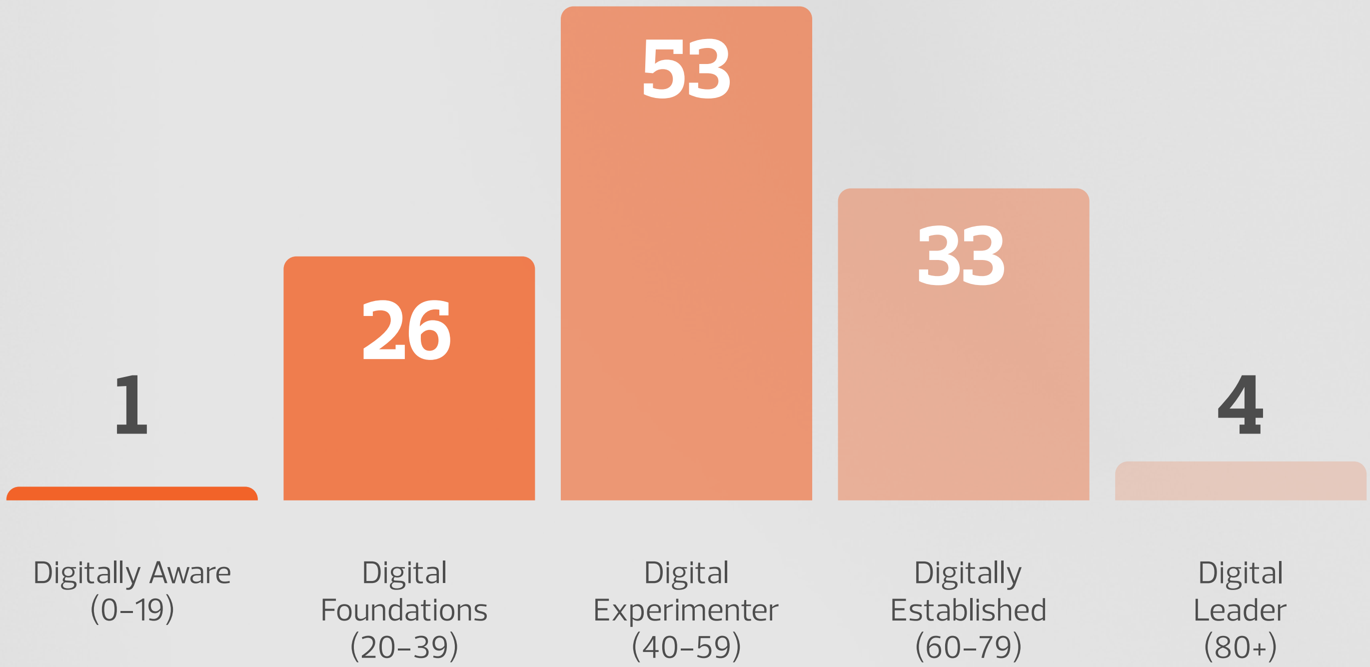


67% of organisations consider themselves as advancing or advanced in digital (compared to **55%** in 2023). **39%** of private fitness and leisure operators say they're advanced, while only **20%** of public operators say so.



UK participants (n=117)

The highest overall score was **90%** – one of four **Digital leaders** (**80%+**), which represents organisations already making digital deliver significant business performance and setting the benchmark for peers to follow. The lowest score was **15%**.



UK participants (n=117)

Digital Futures Cohort

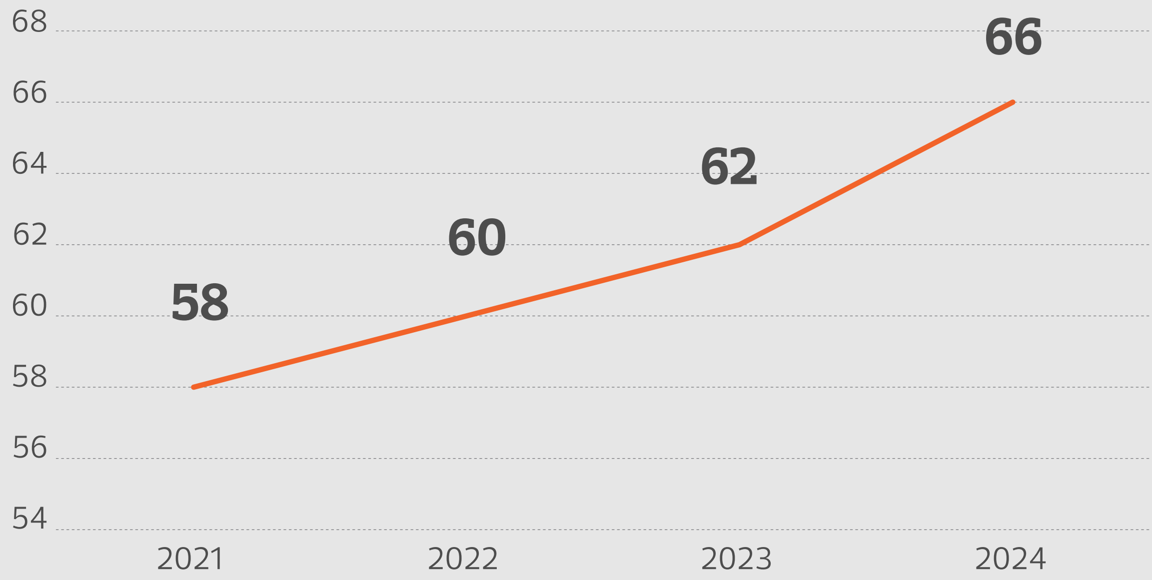
The 'Digital Futures Cohort' is the set of organisations that participated in 2024 and at least once before.

Digital Futures Cohort 2+ years – 76 organisations – **55%** score

Digital Futures Cohort 3+ years – 42 organisations – **59%** score

Digital Futures Cohort 4 years – 20 organisations – **66%** score

The 4 year Cohort has increased their score every year, but by the highest percentage between 2023 and 2024



Digital Futures cohort (4 years) (n=20)

Playing an active role in the Digital Futures programme has helped organisations to increase their use of digital and its positive impact on their performance. We encourage more organisations to follow in the footsteps of the Digital Futures Cohort into 2025 and continue to benefit from the support obtained through participation.

Growing adoption of digital by consumers, but still an age gap

In ukactive's Consumer Engagement Polling and Insights survey, September 2024, **79%** of gym or leisure facility members say they use a digital platform provided by their fitness or leisure operator (**+2%** vs 2023). This rises to **86%** of 16 to 24-year-olds but falls to **51%** of 55 to 74-year-olds.

49% of those using digital say they use the mobile app the most but this rises to **60%** for 16 to 24-year-olds.

Areas of digital

All areas of digital have scored higher this year but Data and Insights has seen the highest growth (**5%**), despite a fall last year.

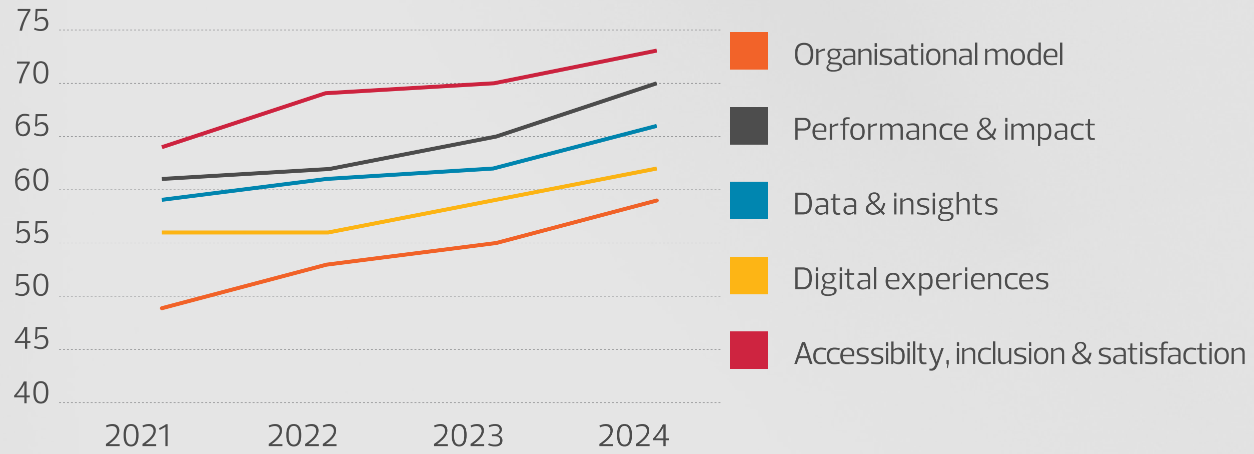
Are organisations now starting to grasp the value from larger datasets? Higher scores suggest growth in data and insight capabilities, adoption of data standards, data security and infrastructure. The volume of data across multiple sources is only going to grow due to emerging technology like AI and cloud services.

Organisational model	Performance & impact	Data & insights	Digital experiences	Accessibility, inclusion & satisfaction
48% (**+2%** vs 2023)	**56%** (**+4%** vs 2023)	**52%** (**+5%** vs 2023)	**47%** (**+4%** vs 2023)	**55%** (**+4%** vs 2023)

UK participants (n=117)

Digital Futures Cohort

Returning participants have seen an increase in their scores for each area every year. Accessibility, inclusion & satisfaction has consistently scored the highest, but Organisational model has seen the highest growth since 2021.

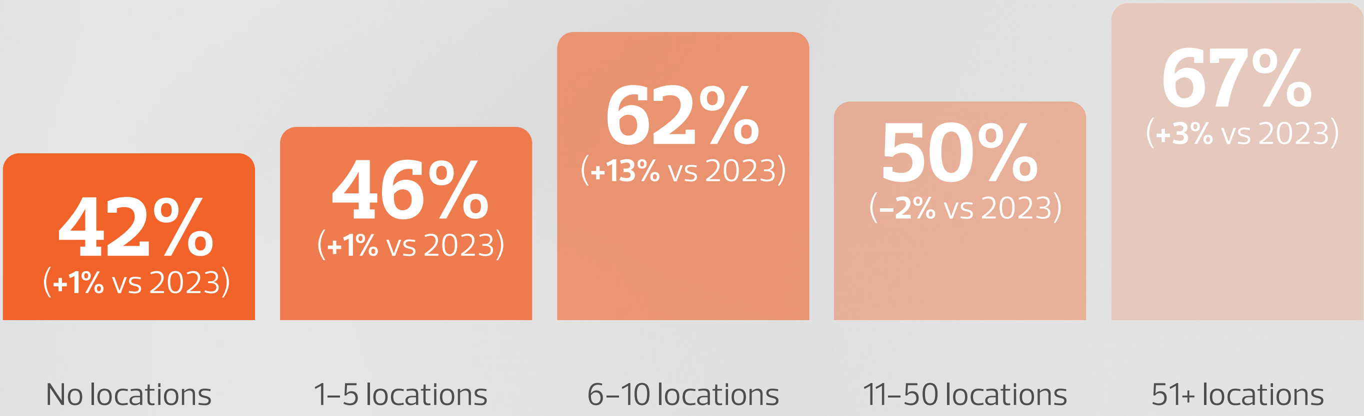


Digital Futures cohort (4 years) (n=20)

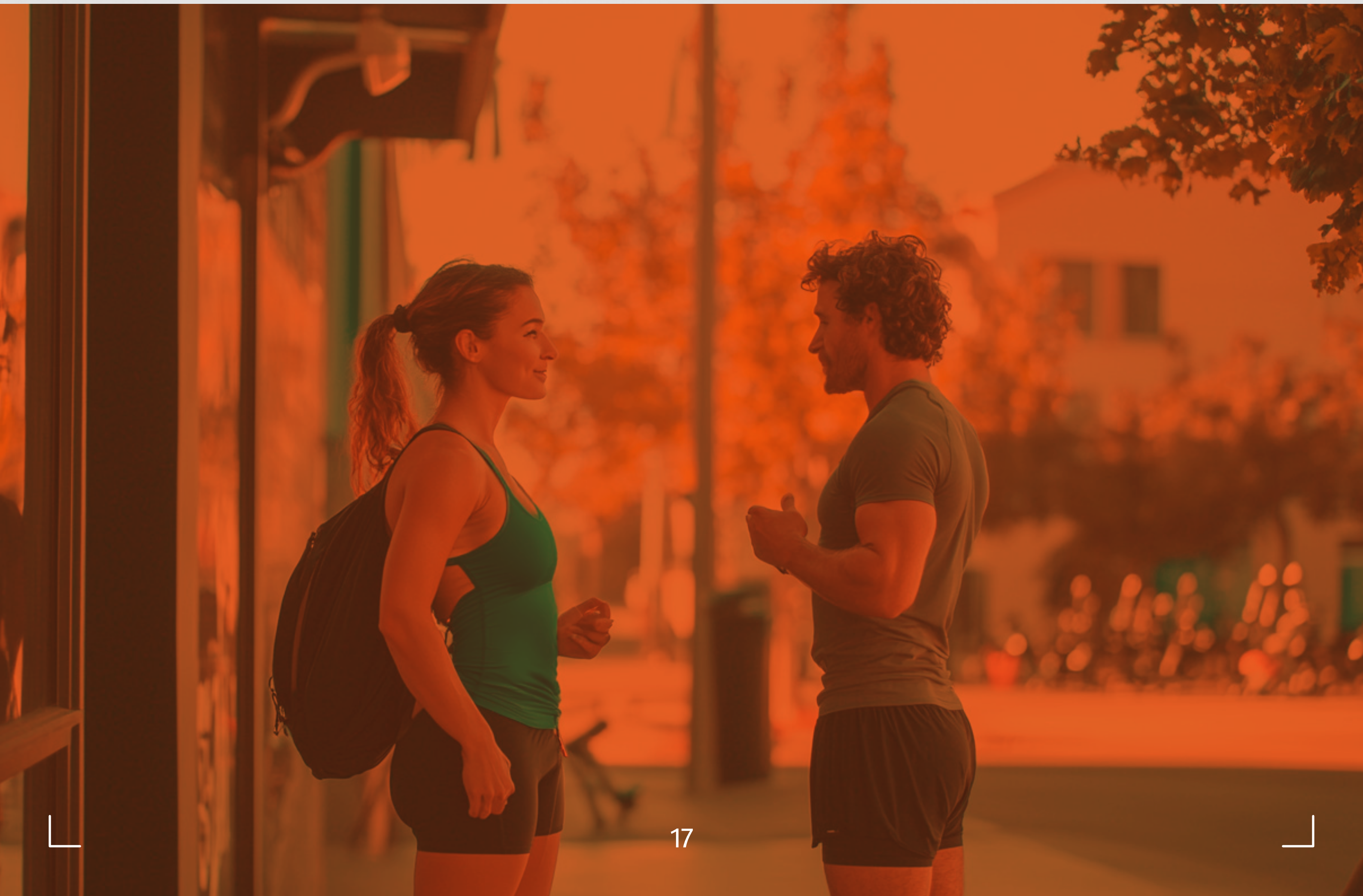
Organisation size

Smaller organisations tend to have fewer resources and it can be hard to compete with larger ones, however, we have seen a leap in scores this year for organisations with 6-10 locations. Operational agility and smart use of digital has enabled them to punch above their weight.

Brio Leisure, one 6 to 10-site fitness and leisure operator, streamlined operations and shifted focus from manual tasks using an AI-powered automation solution. They can now easily identify growth opportunities and potential risks, empowering their team to prioritise in-person services.



UK participants (n=117)



The findings highlighted several notable individual measures, which were discussed during our industry panel roundtable. The following outlines the results and provides insights from the panel and actions to drive positive change.

Digital strategy highest growth over 4 years

The Digital Futures Cohort has seen the highest growth in digital strategy scores of all digital measures, with only **15%** not having a digital strategy. However, **36%** of all participants do not have a digital strategy, and only **18%** say they have a digital strategy that is up to date, complete, ambitious, and supported with a roadmap.

"Having a digital strategy as something to play back to our board has given me a stronger footing, something that fits with their culture and outlines an overall direction."

Digital Futures panel member

Where digital strategy could be improved

A digital strategy ensures that all digital initiatives are aligned with the overall business goals. Without it, digital efforts can become fragmented or misaligned, wasting resources and missing opportunities to drive business growth. While there is no determined path in which to implement a digital strategy, discussion by the panel assessed that the human desire to solve problems quickly may result in organisations skipping the important first step of scoping the problem.

Asking the right questions and getting to understand the customer, or user needs first is essential in implementing an effective strategy.

"You've got to ask, whose pain points are you trying to solve? And essentially, why are we using digital? Is it to solve a problem, to make it more efficient? That's where mapping is a really good place to find out the issue and the options for solving it."

Digital Futures panel member

Questions to ask when building a digital strategy

Assess the current situation

- What are your business goals?
- What are the problems you are trying to solve?
- What are the implications for the individual and the wider business?
- What tools are already in place that could be utilised to solve the problem?
- How do your current digital tools help, or hinder, the business goals

Learn about the customer

- Who are you trying to solve the issue for?
- What are their pain points?
- What feedback and insight do you have to support your strategy?
- How are they using your service currently, and where are their sticking points?
- How could digital services be improved/introduced at these points?
- Is it appropriate to use digital – is this what your customers want?

Leisure Management System (LMS) changes

In a new question this year, **68%** say they have a cloud-based LMS, but **100%** of organisations that have an LMS say they're at least considering a change of version or provider in the next 12 months.

As in previous years, a large proportion (**86%**) say that at least some of the systems they have hold them back.

Panel insight

There is a major need for interoperability between systems, however it's a complex area to navigate. Our panel acknowledges that the sector is challenged with legacy software that often lacks compatibility with other systems, and major software providers can lack the dynamic capabilities required to deliver change at the pace it is required.

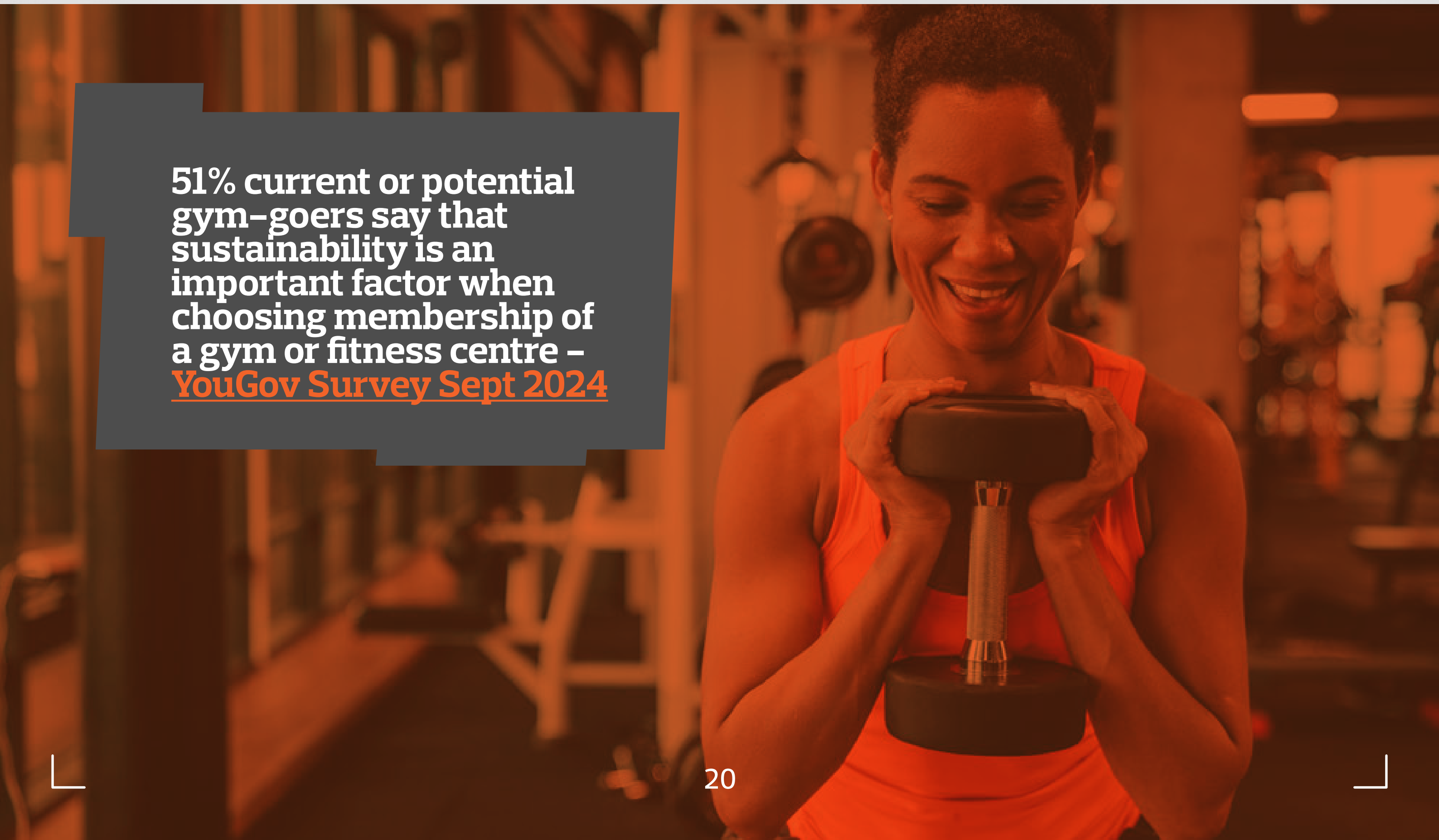
Data security is of the utmost importance, and organisations need to feel confident that through interoperability, data will be securely managed, transferred and stored. This can be a limiting concern for more cautious organisations.

Environmental impact considerations up

29% have made no consideration to the environmental impact of digital technology, down from **52%** in 2023. This measure has seen the biggest shift this year, albeit from a low base.

Panel insight

Anecdotally, our advisory panel note that environmental impact is an increasing consideration in the fitness, leisure and sport sector, advising that environmental consideration is no longer about making statements, it's about providing real action and evidence of change. One driver for this is that increasingly, Corporate Social Responsibility is being baked into tenders, demanding real evidence of impact-reducing measures. Additionally, as a recent YouGov poll confirms, gym-goers are becoming more sustainably-minded, providing extra incentive to make decisions that will positively impact the environment. This also applies to attracting employees. So, while digital investment in environmental responsibility can have immediate financial costs, it can pay back significantly in the longer term through efficiencies, business won, employee attraction and customer gains.



51% current or potential gym-goers say that sustainability is an important factor when choosing membership of a gym or fitness centre – YouGov Survey Sept 2024

"Digital technology can potentially make an absolutely huge financial and environmental impact. If we can get everything working as it should be, shutting the right things down, turning it on at the right times, there's a big opportunity for operational efficiency."

Digital Futures panel member

Mapping your digital journey to understand how energy is used throughout can help identify areas of potential savings:

"We've been doing quite a lot of work around utilising existing PCs and using OS software to prolong the life of those PCs. So if they're over five or six years old, we've been putting Chrome OS on them, allowing us to keep them for another four to five years. Because it's more cloud-based, it's using less hardware space and it's more sustainable."

Digital Futures panel member

Ways to use digital for sustainability improvements:

Introducing energy management systems for operations, such as:

- Controlling lighting through light sensors, timers or smart systems based on occupancy
- Automated equipment shut down when not in use
- Energy monitoring tools to identify inefficiencies

Replace paper with digital alternatives in customer management:

- Paper-free contracts and waivers
- Digital marketing over doordrop where possible
- Bookings via apps
- e-receipts and invoicing

Virtual experiences down

Online classes and other virtual experiences have seen another fall this year (**-16%**), following a declining trend since 2021.

It seems that more of the virtual services provided during the pandemic have been cut back, with lower demand or commercial viability.

"We had run virtual classes online, however we are stopping these due to low attendance. Virtual classes at our centres will remain."

Digital Futures participant

"We were trying to create omnichannel in 2021, because the expectation was that this is going to be a core pillar of revenue for us. Now, when you look at the data and at the utilisation, it might do something, but it's not a core pillar."

Digital Futures panel member

In contrast, however, the panel advised that individual trainers are more likely to implement virtual experiences for personalisation in order to maximise reach and engagement with customers 24/7.

ukactive's Consumer Engagement Polling and Insights survey, September 2024, cites **59%** of members of a gym or leisure facility take part in some form of virtual experiences as part of their overall activity. This figure falls to **41%** of former members and just **18%** of those who've never been a member, so there's little evidence to suggest people are bypassing gyms and leisure facilities in favour of virtual experiences.

Those participating in virtual experiences cite them being cheaper (**26%**) and being more flexible (**24%**) as top reasons. This rises to **34%** and **32%** respectively for 16 to 34-year-olds.

The most important takeaway is to understand what your customers want and need – as these will change depending on what is going on around them and their relationship with physical activity.

Skills gap

Fewer than half of organisations (**45%**) say a large proportion of their people are 'digitally savvy' and 'digitally skilled'.

58% cite building digital skills as a digital priority in the next 12 months.

> *"There's quite a low level of IT confidence in the industry (e.g. Excel, Power BI). Gen Z are savvy with social and apps, but don't have a great understanding of business applications. There's a need for training on them."*
>
> ***Digital Futures panel member***

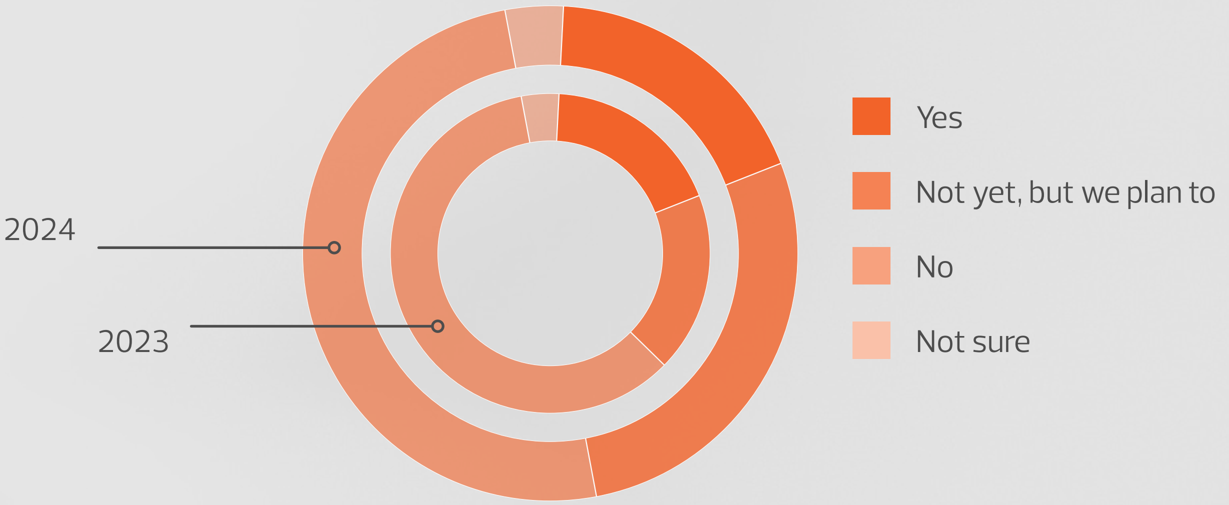
These figures highlight a disparity in the industry between the willingness to invest in training, and the perception of the abilities of staff. In our panel discussion, it was noted that there is an assumption that technology is becoming more intuitive, and therefore requires less training, however this was noted to be a misconception.

> *"That mindset that we haven't actually got to drive the adoption (of technology), is such a leap of faith that's misplaced. You can pretty much guarantee that whatever that system is, without training, it will be used inaccurately."*
>
> ***Digital Futures panel member***

It's important not to exclude anyone from digital, and inclusion should be considered when improving experiences for your customers as well as your staff. Read more about the digital divide from The Good Things Foundation and specific considerations for our sector from Sport England.

AI adoption

There's been a slight increase in organisations saying they're using AI in day-to-day operations (**+3%**), however a lot more are saying they plan to (**+11%**).



UK participants (n=117)

Interestingly, a similar question in this year's Charity Digital Skills survey, reports a large proportion of charities are using AI (**56%**), but **80%** of these say they're using it 'informally'. Is this the case for our sector too?

> *"Our biggest problem with our data is that we probably run over 1000 different products. So if you try to look at the typical user for each one of them, you're suddenly looking at 1000 lines of data. That's where I think AI would eventually be useful."*
>
> ***Digital Futures panel member***

The AI opportunity

AI and smart technology is increasingly integrating into digital systems in a way that organisations may not even realise. For example, through the use of algorithms to optimise class scheduling. AI provides a significant opportunity to the sector to support operational efficiencies and improve customer experience. There are both large and small gains to make by implementing AI, where appropriate and where a strong foundation of data skills and data governance foundations exist.

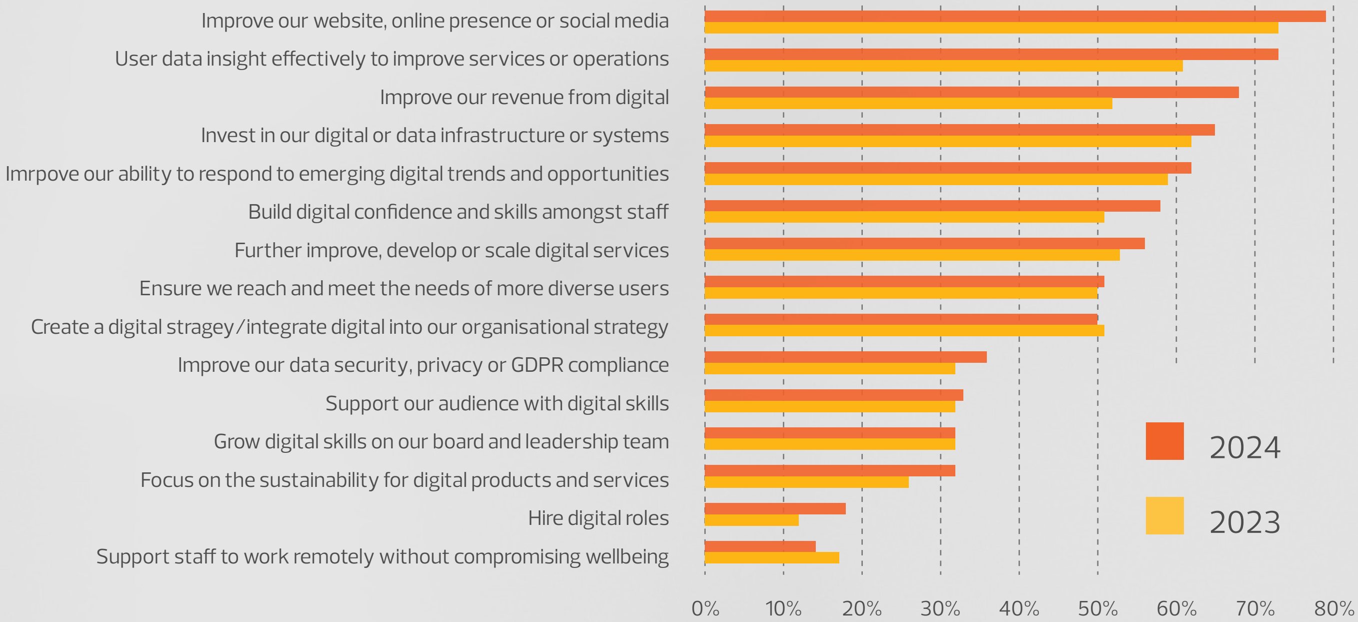
> *"AI isn't complex or scary – it's simply a better way to get work done. Many organisations are already using it without realising, from scheduling to customer service. Those who aren't exploring AI today risk falling behind tomorrow, not because it's trendy, but because it's becoming as essential as having a website. The opportunity is there for everyone – start small, think practical, and let AI make your work easier."*
>
> ***Steffi Bryant, Chief Operating Officer, KeepMe***

> *"AI should be seen as a tool for practical solutions, such as increasing efficiency, enhancing personalisation, and protecting data security, rather than a trend to follow blindly."*
>
> ***Digital Futures panel member***

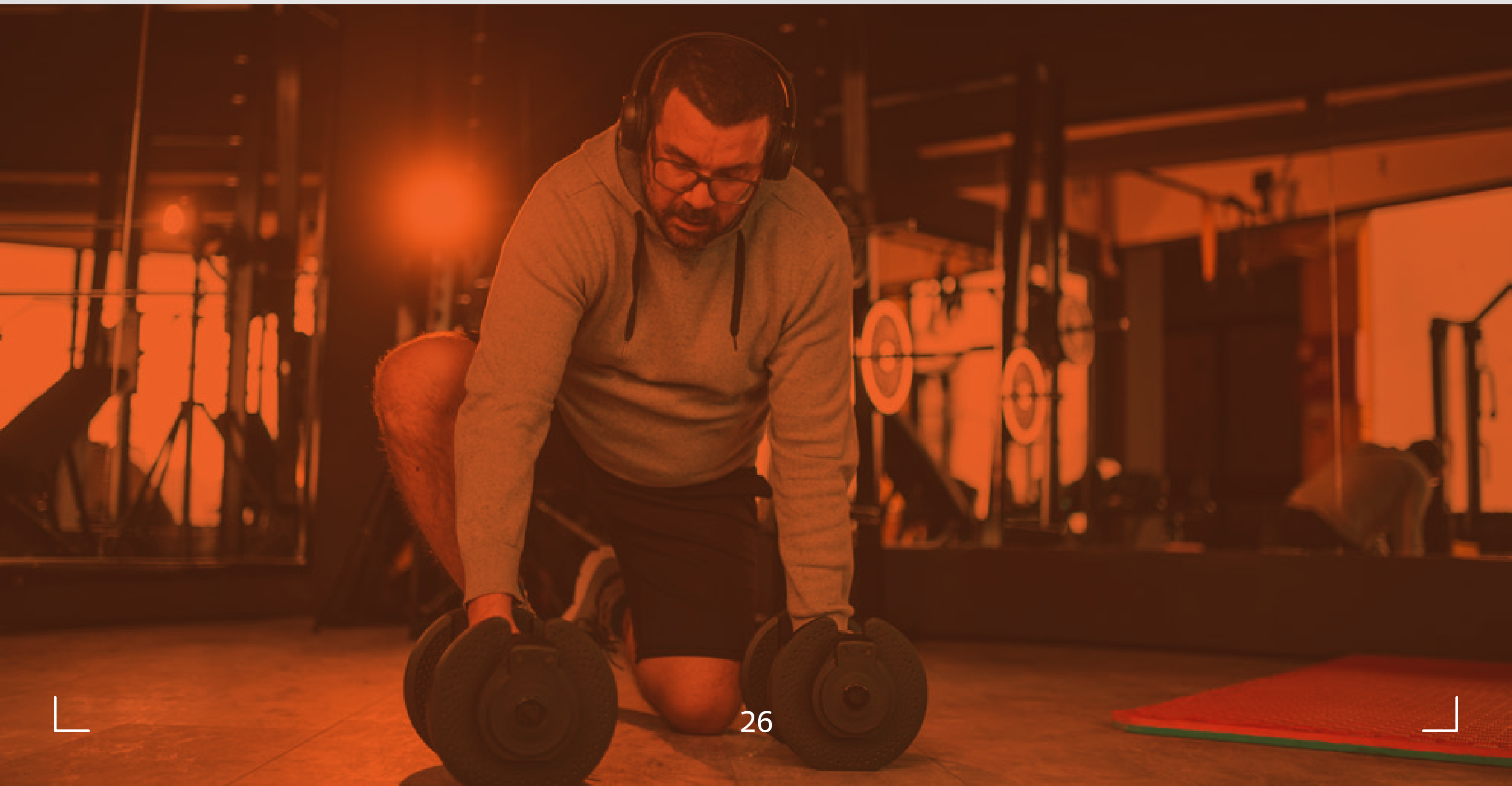
Future priorities

Improving digital experiences and harnessing data were again cited as the top digital priorities over the next 12 months, but improving revenue from digital saw the greatest rise (**+16%**).

Hiring digital roles and supporting staff to work remotely were highlighted by the fewest organisations.



Digital transformation is always on and ever-evolving. In many ways it must be dynamic, as technologies develop continually. Investment in systems, training and analysis is paramount to maintaining digital stability, and essential to achieve the improved revenue from digital that is being prioritised over the next 12 months.



What other sectors say

Point to note:

Our sector is not alone in facing today's economic and technological challenges, and we can learn from other sectors in how they are advancing their use of digital.

74% of global business leaders who responded to Deloitte's digital transformation research in 2023 agree that digital transformation is the single most important investment they can make to drive enterprise value. But two thirds struggle to understand how to assess the value.

Deloitte's Measuring Value from Digital Transformation Research includes a new multidimensional framework that spans Financial, Customer, Process, Workforce, and Purpose measures. This more holistic set of 46 KPIs reveals a critical gap in digital value measurement with industry and regional nuances. Leaders that best close that gap report, on average, **20%** more value from their digital initiatives. Organisations seeking to win on digital today must recalibrate the metrics that matter.

50% of charities in the 2024 Charity Digital Skills Index, consider themselves as advancing or advanced in digital compared to **67%** for our sector.

27% of charities say that digital is a high priority – one of their top organisational priorities – compared to other priorities. **38%** of our sector say digital is a high priority.

In Digitopia's Digital Maturity Report released this year, the annual global multi-industry study reports another rise in maturity but a deceleration in the pace of digital progression, highlighting trends of inertia and complacency in various sectors.

The report suggests that recent economic and political challenges, such as the cost of living crisis and energy crisis, have meant a more conscious approach to investment, diverting some focus and resources to other areas. Digitally-mature organisations in leading industries such as banking and telecommunications have relied on their existing digital offerings rather than progressing significantly further, giving opportunities for other industries and lower-maturity organisations to catch up.

However, McKinsey reported this year that the distance between digital and AI leaders and other industry players is big, and it's getting bigger. They cite that, when implemented well, digital and AI can provide compounding advantages. Capabilities, not just products are the key to progression. Lower-maturity organisations can catch up if they can commit to rewiring how they're run, with a focus on data skills and foundations initially.

How to grow your digital maturity and effectiveness

ukactive's Vision 2030 strategy sets out to increase participation and get more than five million new users active within members facilities by 2030. Sport England's 'Uniting the Movement' seeks to ensure that we are collectively investing time and energy to reduce the inequalities that exist across the fitness, leisure and sport sector. If we are to achieve these aims, we must begin to show sector-wide, year-on-year improvements in how organisations harness digital.

The Digital Futures Cohort has demonstrated that being part of this programme is having a positive impact on each participant's digital maturity and effectiveness, and its ability to keep pace with the consumer.

We encourage all organisations to follow in the footsteps of the Digital Futures Cohort by completing the maturity tool to receive a digital score, working through the recommendations in this report, and participating in future consultations.

This year's consultation has highlighted the need for practical support for organisations to grow their digital maturity and effectiveness and better meet the growing needs and expectations of the consumer. We are also clearer on which support is most useful, depending on the stage of digital maturity you are in as an organisation. The key areas identified as critical to each stage are:

All stages:

- Get or update your digital score
- Collaborate with others

Digitally Aware and Digital Foundations

- Create or update your digital strategy
- Understand your (target) customers

Digital Experimenters

- Leverage data and insights
- Should you consider changing your LMS?
- Grow your digital skills

Digitally Established and Digital Leaders

- What to do with AI

Each of these recommendations is explained in more detail below, with links to advice and further information where available.

Get or update your digital score

To measure year-on-year growth of digital maturity and effectiveness through the Digital Futures initiative, ukactive members will be able to complete an annual survey, receive their score and be supported with recommendations.

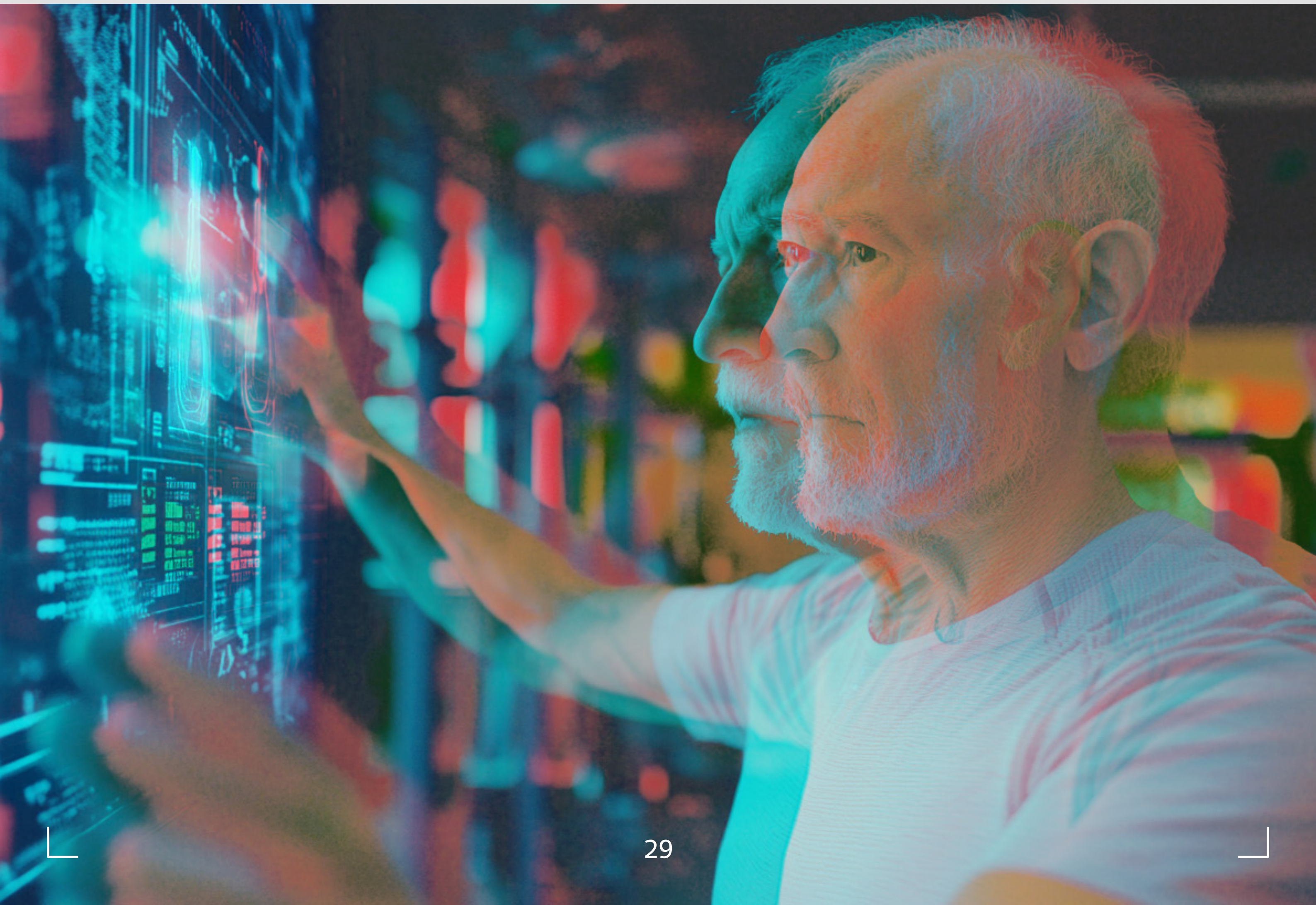
In addition, organisations can get an initial or updated score instantly, anytime, to benchmark with their past performance and access relevant resources, personalised to their new score.

Rewrite Digital also offers all organisations a free 30-minute consultation to discuss their digital score and has been helping organisations to develop and implement their digital strategies. Contact Jon Reay at Rewrite Digital for more: jon@rewritedigital.com.

If you have already participated but not yet received a link to your score please click this link and we will resend it: digitalfutures.ukactive.com/resend.

If you have feedback or suggestions on Digital Futures, please visit: digitalfutures.ukactive.com/feedback.

If you are having any issues accessing or using the tool, please contact Dave Gerrish, ukactive Strategic Lead – Digital: davegerrish@ukactive.org.uk.



Create or update your digital strategy

Only **18%** of organisations have a digital strategy that is up to date, complete, ambitious and supported with a roadmap, while **36%** of this year's participants do not have a digital strategy.

Putting a strategy together is the first step towards growing your digital maturity and effectiveness. There is no one-size-fits-all, but one common factor is that a digital strategy should connect and be embedded within your overall business or leisure strategy, because digital is a critical enabler of the change and impact you seek to make.

Read our white paper on digital strategy for tips on how to develop one and examples.

Case Study: Everybody Health & Leisure

You may find it useful to gain insight or support from a third party to develop or update your digital strategy. Everybody Health & Leisure faced several challenges with their existing digital systems, which hindered their ability to provide a seamless member experience, streamline operations, and leverage data to drive better decision-making.

They engaged an external provider to:

- Conduct a digital audit to identify inefficiencies and areas for improvement
- Map existing customer journeys and identify pain points and opportunities
- Propose an ideal digital state that streamlines user experience and integrates communications
- Provide strategic recommendations for improving system integrations and automation
- Develop a phased digital transformation roadmap, prioritising high-impact, low-effort initiatives

The digital audit and customer journey mapping exercise equipped Everybody Health & Leisure with a strategic plan for their digital transformation, including a clear roadmap, immediate actions to address quick wins, and long-term strategic initiatives including AI integration, CRM enhancements and a potential website rebuild.

> *"The assessment and roadmap provided Everybody Health & Leisure with a strong foundation to drive our digital transformation in alignment with our broader business goals for 2025-2028."*
>
> ***Kris Sankey, Head of Business Development, Everybody Health & Leisure***

Collaborate with others

Collaboration is a theme we have highlighted since 2021. As a sector, there are challenges that benefit from tackling together. Wherever you are on your digital journey, there will be others like you to learn from. Can you collaborate, save on costs, or pool your demands on suppliers?

Fill out this form if you would like to meet or discuss digital challenges or opportunities with peers or suppliers.

Should you consider changing your LMS?

Most organisations are dependent on their Leisure Management System (LMS) and other third-party platforms, but that does not mean it should limit your capabilities and ambition. Maintain an open dialogue with your suppliers; push them to understand your needs and to enable the features you need.

It may seem more cost-effective to maintain legacy systems rather than undertake a major upgrade or platform switch, but suppliers find it hard to support old versions of their products and will devote most of their investment into new versions on the Cloud, making older systems redundant. So you should ensure that you at least have a plan to move to the latest cloud-based platforms (ideally within the next three years) if you have not already done so.

Below, we outline the top six reasons to switch to a cloud-based LMS, along with five items to consider when selecting a supplier.

Six reasons to switch LMS:

Cost savings & scalability

- **Reduced IT overhead** – Eliminates the need for in-house servers and costly infrastructure and service management. Hardware failures and upgrades are managed by the cloud supplier for the LMS software.
- **Feature set extension** – Cloud solutions are typically organised into modular features, allowing you to pay only for what you need. As your business grows, you can easily activate additional features, providing flexibility while minimising upfront capital expenditure.
- **Add locations effortlessly:** Expanding to new facilities becomes simpler, as cloud systems can quickly accommodate additional sites.

"Preparing for your move to a strategically open platform delivered by your current or future supplier is now a requirement to ensure your progress along the stages of digital maturity. No one software company can supply all of your consumer and business needs and the result of this fact is the inevitable requirement to deliver an ecosystem of solutions which fits your business goals. Making your plan to establish your ecosystem is the first job at hand, deciding on your LMS capabilities versus those needs is the second and planning your organisation's digital development is the third and most rewarding step."

Peter Croft – VP Alliances and Partnerships, Sports Alliance (PerfectGym is a Sports Alliance company)

Automatic updates and innovation

- **Continuous improvement:** Cloud solutions frequently release updates and new features without downtime or manual installation.
- **Future-proofing:** Cloud solutions adapt more easily to new technologies, making them more sustainable in the long run.

Accessibility & mobility

- **Anytime, anywhere access** – Empowers your staff to manage operations remotely, as well as on site, freeing tasks to be actioned flexibly at any time of day.
- **Mobile-first, user-friendly design** – Enables your staff to efficiently perform operational tasks on smartphones, tablets and computers alike. Some of the legacy LMS platforms have a less intuitive user interface making completing simple activities more time consuming.

Real-time reporting and analytics

- **Live data insights** – Cloud-based LMS solutions enable data to be updated and stored in real time. This means real-time reporting on acquisition, engagement, retention and revenue numbers across your facilities.
- **Enhanced decision-making** – Real-time KPI tracking, allows you to assess the impact of operational changes on engagement and operational efficiency, as you make them.

> *"Cloud-based legacy systems combine the reliability and industry-specific functionality developed over many decades with the benefits of cloud accessibility. However, as technology and customer expectations evolve, leveraging the experience embedded in these systems while planning for modernisation to a true SaaS solution is essential. Working closely with your leisure management system provider will help ensure a strategic approach to digital transformation and integration, so you can maximise the potential of your legacy system without compromising its strengths."*
>
> ***Phil White – Chief Product Officer,***
> ***Xn Leisure***

Member experience

- **Self-serve capabilities** – Cloud-based LMS solutions permit members to manage their membership and update their personal information online or from a mobile app, rather than relying on teams on site to do this on their behalf.
- **Personalised communications** – Cloud-based LMS solutions can be easily integrated to cloud-based CRMs for personalised and tailored member communications.

Enhanced security & compliance

- **GDPR compliance:** Cloud-based LMS solutions have been developed and launched during a period of heightened data privacy regulation, with many providers actively pursuing security certifications.
- **Security updates and patches:** Cloud systems receive planned security updates automatically, protecting your business from the latest threats.

Five things to consider when changing your LMS

1. **Interoperability**

- Open APIs: Ensure the supplier provides open APIs, (Application Programming Interface) both now and in the future, to facilitate seamless integration with other systems. Open APIs allow your LMS to connect with third-party platforms such as CRM tools, booking platforms, fitness tracking apps and more. It is important to understand when not to use open APIs and consider single/closed APIs based on security considerations and the level of access required when designing your product offering. Also as part of planning ensure ongoing support is also captured.
- Third-party integration fees: Some platforms impose additional fees for integrating with external systems (e.g. CRM, booking platforms, etc.). It's essential to align on costs, release schedules upfront and ensure that delivery timelines are clearly defined and included in any contractual agreements.

2. **Customisation limitations**

- Feature gaps: Some facilities may find that the software provides more functionality than their organisation needs, while others might discover it lacks specific niche features currently available on their existing platform. Again, be sure to confirm where missing features are within the partner's roadmap and include a committed delivery timeline in any contractual agreements.
- Standardised offerings: Some cloud platforms offer limited customisation to cater to the specific needs of a gym or leisure centre. Be sure to prepare a list of non-negotiable requirements ahead of selecting your platform, and confirm whether customisations can be built by them, or a preferred supplier list. Any customisation should be cost analysis based as well as capturing ongoing support costs as part of the planning process.

3. **Data migration**

- Migration challenges: A robust migration plan should include data mapping, cleansing, validation, and secure transfer processes to minimise disruption. Look for providers that offer dedicated migration support, including timelines, detailed checklists and a clear division of responsibilities. It's also crucial that the provider performs testing and validation to ensure data accuracy after migration.

4. **Training and change management**

- Staff resistance to new technology: Ask your supplier to schedule multiple training and Q&A sessions with your staff, so team members feel comfortable and confident in the new product.

5. **Customer feedback**

- Testimonial: Reach out to your network for feedback on the supplier and ask for any lessons learned in their own transition.

What to do with AI

AI may have only just entered the mainstream consciousness, but as it advances at break-neck speed, many of its opportunities have already arrived and exist as tangible realities. Here are a few of the existing opportunities for AI integration in fitness, leisure and sport based on consultation feedback as the sector learns to embrace emerging technologies.

Business efficiency through automation

AI offers enormous potential to increase operational efficiency by automating time-consuming tasks, allowing staff to focus on more valuable work that can drive key business metrics. Looking outside of our sector, McDonald's provides a clear example: they automated customer-facing tasks with self-service kiosks, however in contrast to what you might expect, this did not lead to staff redundancies. All staff were retained and redeployed into other growth areas.

In fitness, leisure and sport AI can now automate processes like membership onboarding, PAR-Q assessments, scheduling, and retention interventions. By using AI to handle these tasks, staff can focus on member engagement, personalised coaching, and retention strategies to deliver better experiences and drive impact for customers and members.

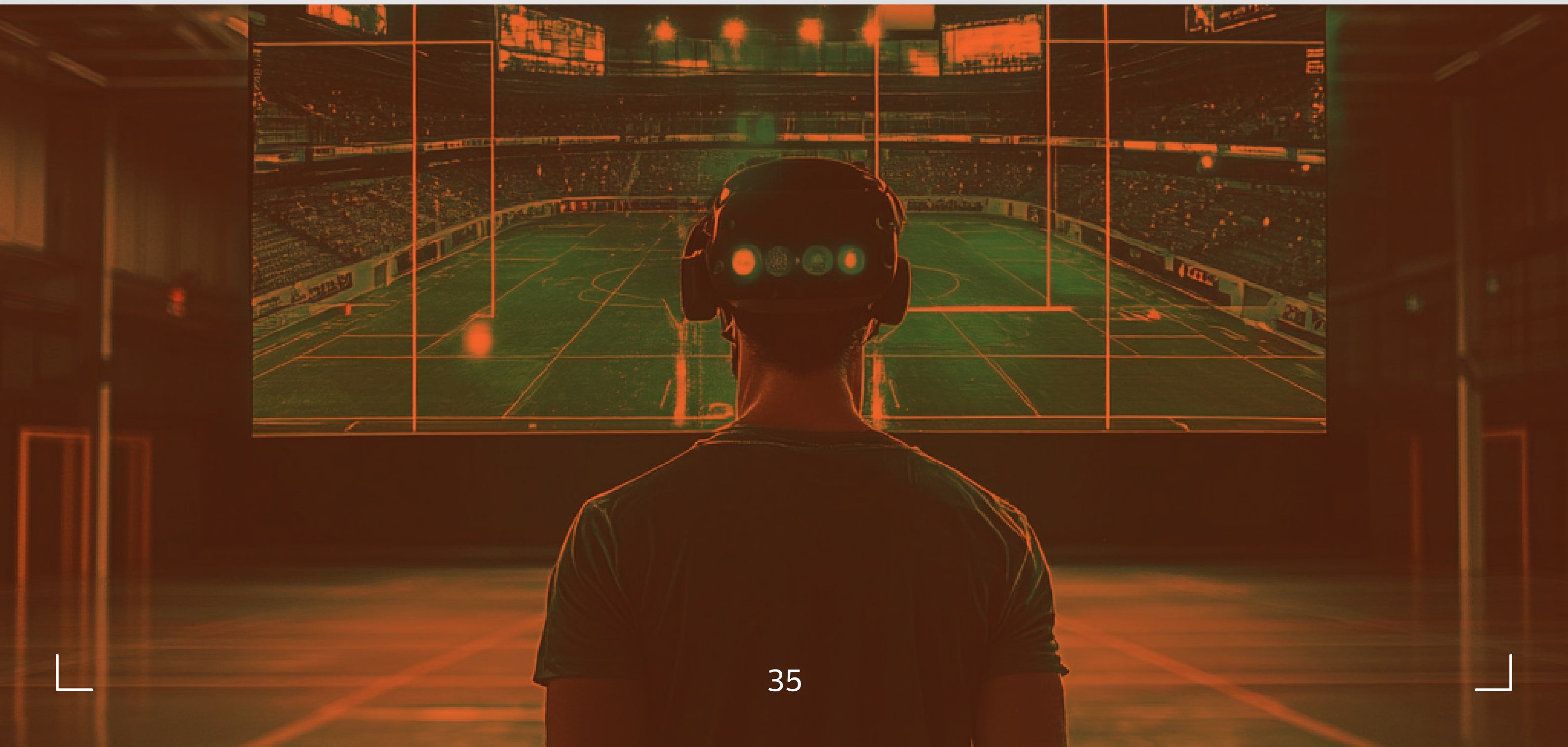
Key efficiency-driving activities include:

1. Membership onboarding: Automating sign-ups allows staff to focus on building member relationships.

2. PAR-Q management: AI streamlines health assessments, speeding up onboarding.

3. Retention interventions: AI flags at-risk members, enabling timely outreach and engagement.

4. Coaching support: AI-generated workout suggestions allow trainers to provide more customised guidance.



Data security and privacy in the cloud

As more organisations transition to cloud-based systems, securing data and ensuring privacy is essential. AI relies heavily on cloud-stored data, so protecting this information is crucial for maintaining customer trust.

OpenChain ISO/IEC 5230:2020 provides an international standard for open-source licence compliance, ensuring that organisations manage open-source software properly. Meanwhile, OpenChain ISO/IEC 18974:2023 sets the standard for open-source security assurance, offering guidance on secure cloud management and sustainable operations.

Following these frameworks means protecting sensitive customer information while transitioning to cloud-based systems, ensuring data privacy, and strengthening trust with members. Digital Futures partners and ukactive are looking to provide further guidance in this area.

Experiences, not just services

The future of the fitness and leisure sector isn't just about offering services – it's about creating experiences. Gen Z, in particular, prioritises memorable, social experiences over simple transactions. They want personalised, shareable moments that go beyond a standard workout. AI can play a significant role in shaping these experiences. By analysing member behaviour, AI can recommend classes or activities that align with individual goals, fostering a more engaging and social atmosphere. AI also helps to automate member journeys, suggesting personalised workouts and even connecting users with similar goals, creating a sense of community. Creating unique experiences, rather than just delivering services, is how organisations can stay relevant and appeal to the next generation of consumers.

Hyper-personalisation

Personalisation has been key for the sector in recent years to provide tailored workout plans, diet recommendations, and activity suggestions with data used to track and analyse customer behaviour. Now, AI allows for hyper-personalisation to track, manage, recommend, and adapt in real-time, delivering an ongoing, evolving relationship between operator and customer. This level of personalisation enhances engagement and retention, offering each member a unique fitness journey based on their progress and preferences.

Grow your digital skills

58% of participating organisations say building digital skills is a digital priority in the next 12 months.

Invest in your people, taking into consideration your workforce's digital skills, mindsets, and education. Digital is ever-evolving and even the most user-friendly platforms can require training to get the most out of their performance.

Younger staff may be more savvy with social platforms for example, but many will still need training on the use of business applications.

The interface and functionality of older platforms in particular may not be as intuitive or robust as modern ones. Lack of training can impact their effectiveness and staff confidence when using technology.

Regularly consult staff on their training needs and invest in their education to ensure you don't fall behind.

Useful resources include CIMSPA's Digital Marketing Hub, Lloyds Bank Academy, CAST, Digital Boost, Be the Business and FutureDotNow.

Understand your (target) customers

With an abundance of buying options, a brand's ability to connect with and attract customers has become deeply rooted in identity – both that of the consumer and the brand itself. Today, it's not enough to merely provide services; businesses must resonate with their audience's personal identity and align with their values.

First, you must consider who your audience is. You might want to identify your 'Hero' members. These can be individuals who have used your facility the most, have rated you highly, referred their friends, or are active on social media. The insights from understanding this group, can align marketing efforts to attract prospects who are likely to become advocates. You may also want to identify members with additional needs, in order to ensure accessibility considerations are a part of the process.

Map the customer journey from start to finish and align this to your business capabilities. Consider the business touch points at each stage in the customer journey identifying needs, such as additional training, better technology, or even identifying that more research is needed at that point in the journey. The more you understand about the customer, the better you are able to service their needs and balance against business priorities.

A further best practice design approach is to do the same for your employees. Looking at the processes from both perspectives helps to join the dots to further understand both the challenges and the possibilities for improvements.

In identifying these, teams can resist the temptation to jump the gun to try to solve a problem before it's truly understood. The real problem may not be what it's assumed, so spending resources on solving it would be wasted. Customer journey mapping can therefore avoid unnecessary or wasted commercial spend. The opportunity for identifying efficiencies is also great.

The Government's Communication Service provides advice on best practice for customer journey mapping, which can be accessed here. Here's a Miro visual template to use too.

Leverage data and insights

73% of participating organisations say using data insights effectively to improve services or operations is a digital priority in the next 12 months.

Collecting reliable and up to date data is the first step. This includes both implicit and explicit data, typically from a range of different sources.

Next, seek to analyse and understand the data by investing in relevant tools and/or people. Bring disparate data together into consolidated reports that align with your business objectives and KPIs (Key Performance Indicators).

Then look at how data insights can be used to personalise customer experiences or create operational efficiencies.

Finally, with your knowledge of what your customers are seeking in experiences, explore the potential of Open Data to meet their needs, while also assessing how to use automation and AI to iteratively learn and act on data while introducing efficiencies in both internal and external processes.

What to do at each stage

Based on your overall score, you can see below what may help you get to the next stage of digital maturity and effectiveness. Note that your exact situation may be different to the typical scenario represented here but it should be helpful as a guide on where to focus.

DIGITALLY AWARE (SCORE OF 0–19)

Typical scenario:

- No digital strategy.
- Unable to determine the performance and impact of digital.
- Minimal customer insights.
- Unavailable or outdated digital experiences.
- Little consideration for digital accessibility and inclusion.

To get to the next stage:

- Develop a digital strategy and roadmap.
- Assess the current skills within your organisation.
- Measure the impact that digital is making on your organisational goals.
- Use a variety of data collection methods to capture the needs and expectations of your current customers and target non-customers.
- Ensure that your website supports acquisition and engagement with your audiences.
- Learn how to make your digital experiences accessible and inclusive.

Case Study: London Community Sports Club

We use websites and some social media platforms but on an ad-hoc basis. It is very time consuming to learn and we are never sure we know the right product to use and what the rules and regulations are for communication and data use.

We would like a better understanding of digital and more confidence with it. We want to develop a bigger presence on social media and have a good CRM specific to our industry to better interact with our customers.

DIGITAL FOUNDATIONS (20–39)

Typical scenario:

- Low digital knowledge.
- Recognition of digital's importance for the future.
- Inconsistent or duplicate data.
- Basic digital experiences in place.
- No regular customer satisfaction surveys.

To get to the next stage:

- Invest in training and/or recruitment to boost digital skills.
- Identify how digital can positively impact organisational goals.
- Consolidate or connect multiple data sources.
- Cleanse or update old or incomplete data.
- Develop new or enhanced digital experiences.
- Establish a regular programme of user research, such as customer satisfaction surveys.

Case Study: Newly Formed NGB (new participant)

As a relatively new national governing body, we are continuously learning and adapting our digital strategies to best serve our community. We are committed to seeking feedback from our members to improve our digital offerings and ensure they are aligned with the needs of athletes, coaches, and supporters.

Our ambition is to fully integrate digital solutions to support the growth and development of our new sport in England. We aim to create a seamless digital experience for our members by implementing advanced membership management systems, online training modules, and an interactive platform for the benefit of event providers (for competitions).

Our vision includes leveraging data analytics to better understand and meet the needs of our members, enhancing virtual engagement through innovative content, and ensuring that our digital presence contributes to the accessibility and inclusivity of cheerleading nationwide.

"As a new NGB, Digital Futures has helped us think about our future direction of travel, in terms of digital engagement and operations."

Director, Newly Formed NGB

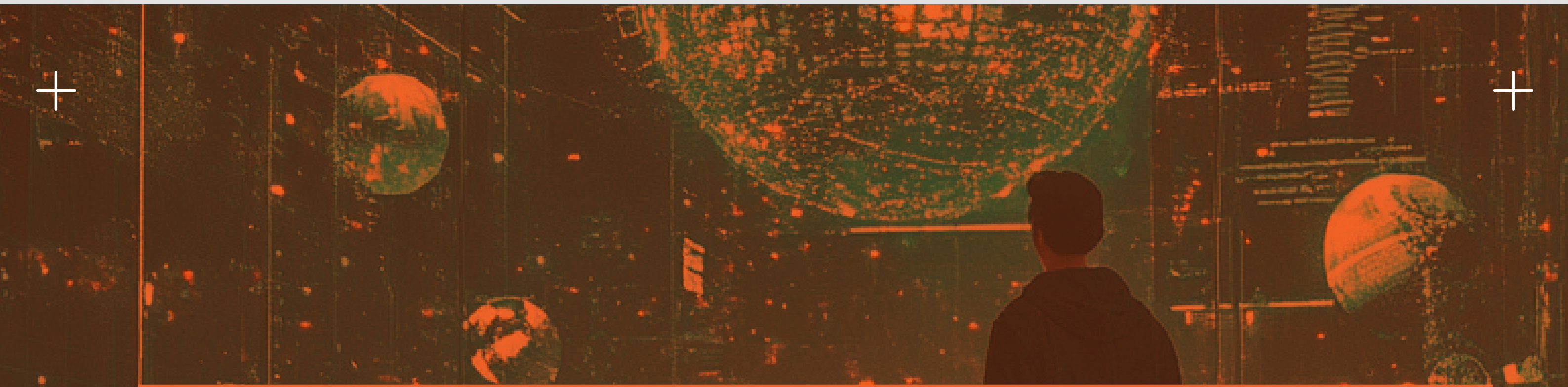
DIGITAL EXPERIMENTER (40–59)

Typical scenario:

- Some digital knowledge but more needed at senior levels.
- Digital is already making a positive impact.
- Not currently getting collective meaning or value from data.
- Some digital experiences need improvement.
- Inconsistent online/offline experience.

To get to the next stage:

- Establish understanding and buy-in of digital within the leadership.
- Build measurable and meaningful business reporting from data.
- Analyse and interpret insights to make service improvements.
- Support your digital teams by prioritising the improvement of internal processes and infrastructure to drive efficiencies.
- Develop improvements to your core digital experiences.
- Ensure that your digital experiences are accessible and inclusive.



Case Study: Mytime Active (4 year participant)

We set an annual digital strategy with a roadmap of activity which is continuously reviewed.

We're always looking at ways to automate processes. If a task is something you do once, it can be manual. Otherwise, automate it.

When it comes to digital advances, we find our staff are more often asking "When can I have this?" rather than pushing back. It can sometimes get pushed down priorities though as digital isn't so visual.

We have an environmental and sustainability strategy and tech plays a big part of that. It's part of our procurement process to ensure that suppliers conform to our policies.

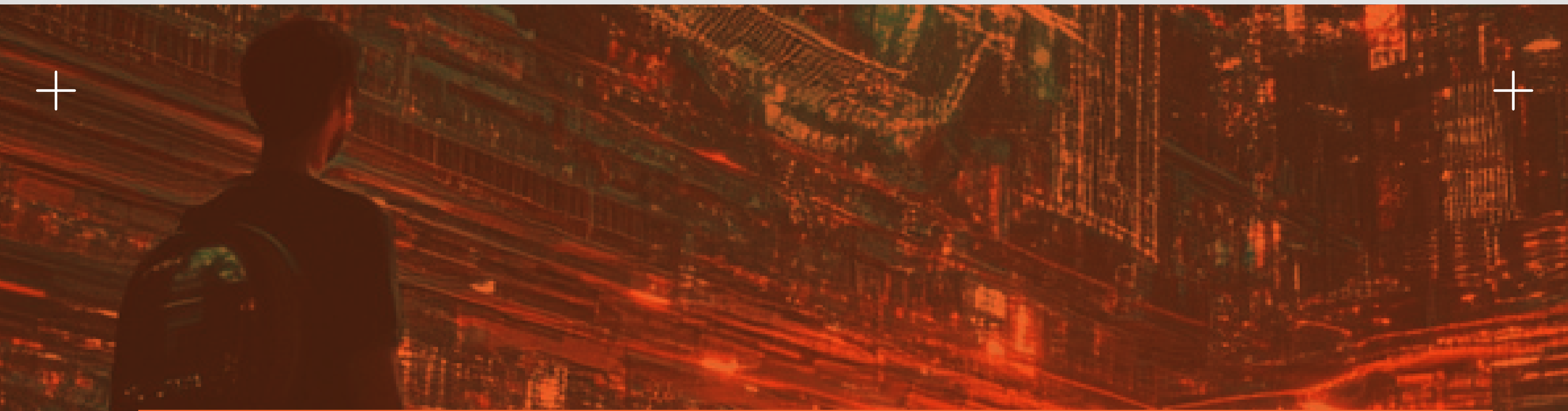
DIGITALLY ESTABLISHED (60–79)

Typical scenario:

- Digital is embraced and supported at all levels of the organisation.
- Clear measurement and optimisation of digital performance.
- Manual reporting and acting on data.
- Maintains a programme of continual digital experience improvement.
- Accessible and inclusive digital experiences.

To get to the next stage:

- Make digital one of the key pillars of your organisation's overall strategy.
- Prioritise impact on your organisational goals through digital.
- Develop automated, real-time reports.
- Automate and personalise communications and processes based on data insights.
- Develop digital experiences that people get nowhere else.
- Ensure that your experiences at every touchpoint are joined up and meeting the needs of your customers.



Case Study: Parkwood (3 year participant)

Our systems are constantly under review to ensure they are helping us drive the value we are looking for. We work with existing suppliers to try and maximise the value in the existing products but if they fall too far behind then we look at alternatives. Our LMS provider has not been able to keep up pace so we've had to bring in other platforms and do our own development to achieve what we need.

Our teams are used to regular reporting and see the value of data.

ESG (Environmental, Social and Governance) is part of the overall company plan with energy targets relating to digital. It's small compared to swimming pools for example, but still important.

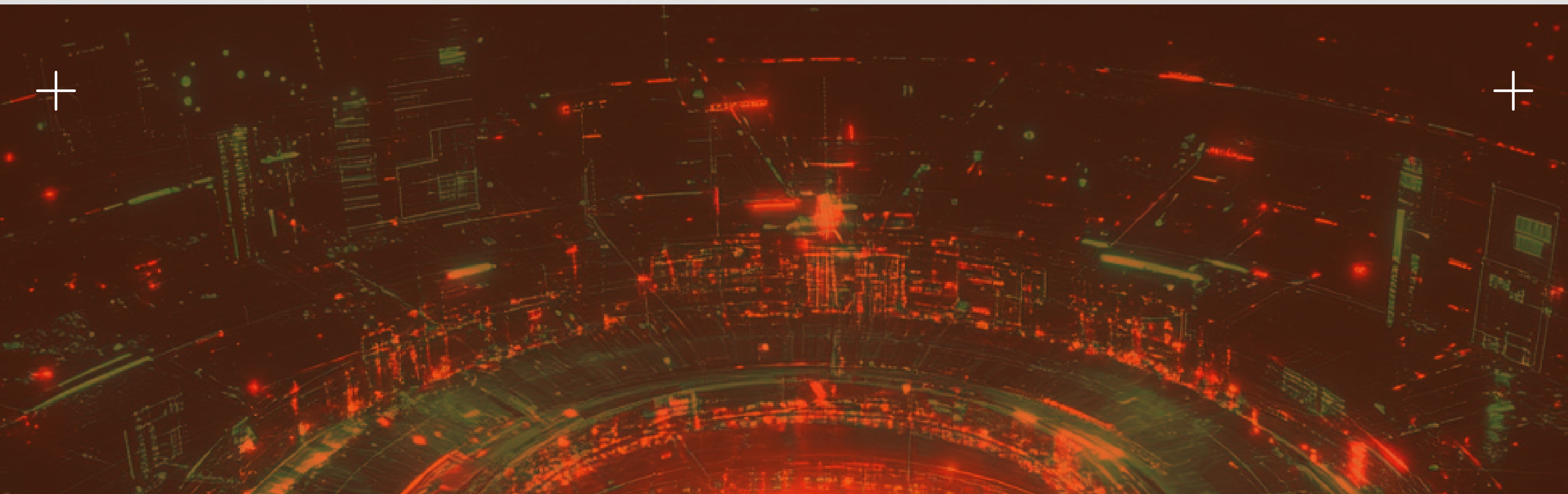
DIGITAL LEADER (80+)

Typical scenario:

- Digital is at the heart of the organisation's overall strategy.
- Digital is a significant driver of performance and growth for the organisation.
- Automated reporting and use of data.
- Sector-leading digital experiences.
- Joined-up, consistent experience online or offline.

To maintain leader position:

- Seek inspiration from outside the sector to refine your roadmap.
- Continually optimise processes to improve performance.
- Use AI to understand and apply increasingly smarter use of data.
- Identify and adopt new channels and partnerships to improve experiences.
- Actively bring your customers on the digital journey with you.
- Design personalised digital experiences based on real-time customer feedback.



Case Study: The Gym Group (3 year participant)

Over the last few years, we have moved from a world where tech was considered a support function to tech & digital being at the heart of our overall strategy.

Our gym managers and operations teams are interested in tech and AI to help them do their job better.

Digital is at the centre of our top line growth, and we have a never-ending focus on doing things better across all aspects of our operation including our processes, tools, ways of working and architecture.

Suppliers to the physical activity sector

Suppliers are enablers of digital maturity and effectiveness for the sector and are intrinsically linked to the success of digital transformation.

However, **86%** of participating organisations say that at least some of the systems they have hold them back.

What can suppliers do to provide the best platform for digital growth?

- Understand the needs and priorities of all your customers.
- Identify needs that are shared among multiple customers to share cost and return.
- Collaborate with each other to combine efforts and deliver products that do not only work in silo.
- Use your greater knowledge of digital and the sector to provide strategic direction.
- Educate and train your customers on making the most of your products and the return on investment.
- Provide resources for the personalised resources library (digitalfutures.ukactive.com/supplier).
- Help to break down the barriers of complexity faced by organisations.
- Use digital scores to better support your customers to grow their use of digital.
- Become a Digital Futures partner to enhance your connection with the sector and the long-term effectiveness of the programme.

Conclusion

The 2024 Digital Futures Report highlights significant progress in the UK fitness, leisure, and sport sector's digital transformation. With an overall improvement in digital maturity and effectiveness, fitness, leisure and sport organisations that have consistently engaged with the Digital Futures programme (known as the Digital Futures cohort) are reaping the benefits of their sustained digital focus. Key advancements in cloud-based systems, data utilisation, and sustainability measures signal a positive shift towards more efficient and environmentally conscious operations.

However, challenges remain. The decline in participation and continued gaps in digital strategy highlight the need for greater industry-wide commitment to comprehensive digital planning. Interoperability between legacy systems, evolving customer expectations, and sustainability demands further underline the importance of modernising digital infrastructure.

To support this, a user-centric focus is needed on digital experiences. This ensures greater personalisation, inclusion, accessibility and enjoyment by all, but especially considering the needs of those communities we aspire to support to address inequalities.

Moving forward, fitness, leisure and sport organisations must prioritise developing robust digital strategies that align with business goals, invest in systems that support integration and scalability, and consider long-term sustainability as a core operational factor. The findings in this report demonstrate that digital transformation is not only a pathway to efficiency but also a critical factor in driving growth, customer satisfaction, and environmental responsibility within the sector.

By embracing these opportunities, the fitness, leisure, and sport industry can secure a strong, future-ready digital foundation.

"As we reflect on the findings of the 2024 Digital Futures Report, it is clear that the UK fitness, leisure, and sport sector stands at a pivotal moment in its digital evolution. The progress achieved through the Digital Futures programme to date highlights the importance of embracing innovative technologies and sustainable practices. However, as a sector we must remain focused in addressing the challenges that persist, particularly in enhancing participation and bridging digital strategy gaps. By prioritising user-centric experiences and fostering inclusivity, we can create an environment where every individual can thrive. At Technogym, we believe that a long-term commitment to digital solutions, strategy and sustainability will not only drive growth, but also enrich the lives of communities. We have an excellent opportunity to build a future-ready industry that champions efficiency, focuses on customer satisfaction, and fosters environmental stewardship."

Nerio Alessandri, Founder and CEO, Technogym

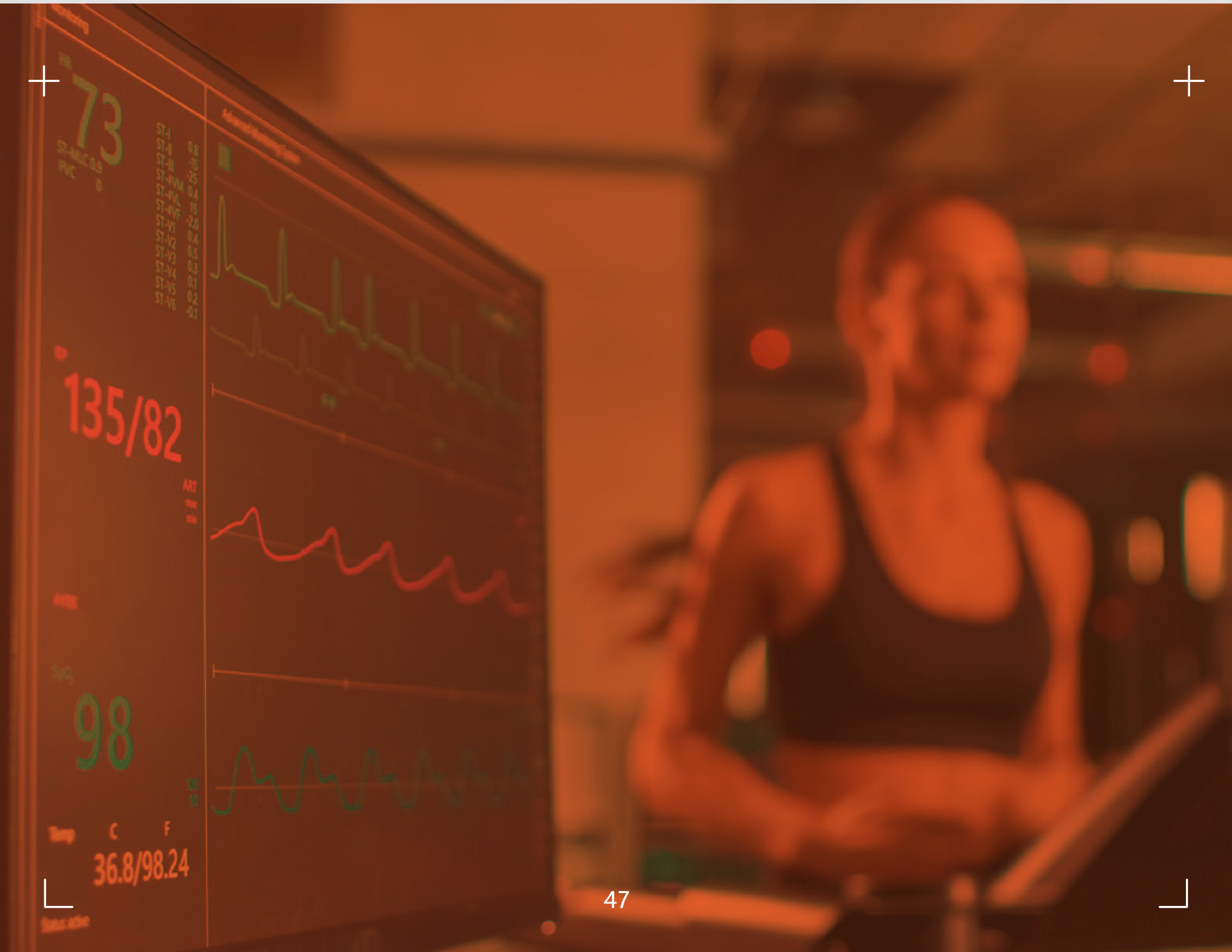
Methodology

Overview

The digital consultation was conducted with UK fitness and leisure operators, National Governing Bodies (NGBs) for sports, Active Partnerships, sports clubs and other physical activity organisations between June and August 2024. The consultation was designed and conducted by an external agency, Rewrite Digital, utilising equivalent experience from other sectors to help define the methodology and design the resource tools to evaluate the sector.

The target audience included public leisure facilities (which is defined as doing activity in a government/council-owned facility), private leisure facilities (which is defined as doing activity in a privately owned facility where a private membership is required to use), university leisure facilities (which is defined as doing activity in a university-owned facility) and sports organisations from the sector. The scale of organisations ranged from those with single sites through to several hundred sites.

It was acknowledged that the digital measures being assessed require a representative view from many departments and at board-level for strategy oversight, so all survey respondents were asked to engage with all areas of the business where digital is used before submitting their response.



The Digital Maturity and Effectiveness Score

A digital maturity and effectiveness score was established for each organisation based on multiple choice responses from an online survey. The survey covered 49 individual measures across five areas of digital to form an overall digital maturity and effectiveness score.

The questions asked in 2024 were identical to those asked in 2023, with the addition of three questions relating to leisure management systems and strategy.

To enhance the research, a deeper dive was conducted with a subset of participating organisations, comprising a qualitative interview against an agreed question bank with key stakeholders.

The areas of digital covered by the measures were:

1. **Organisational model:** A measure of how adapted and prepared an organisation is for digital. This looks at the products and services an organisation provides, how it is structured, its culture, people, infrastructure, processes, and plans.

2. **Performance and impact:** How digital is contributing to an organisation's commercial, social, and other KPIs. This covers downloads and engagement, digital revenues, operational efficiency, participation growth and customer retention.

3. **Data and insights:** Collection and use of data to improve the relevance and quality of consumer experiences and drive value. The areas looked at were explicit and implicit data collection, consumer insights, open data, data reporting, security and privacy, database, and CRM, and how personalisation is formed using data.

4. **Digital experiences:** A measure of how rich and thriving the organisation's digital experiences are. We looked at ease of use, third-party exposure and discoverability. Channel use covered websites, apps, email, social media, connected experiences and virtual experiences.

5. **Accessibility, inclusion, and satisfaction:** How digital experiences welcome, support, engage and satisfy all consumers. This looks at digital access and inclusion, social listening, Net Promoter Score (NPS) and other satisfaction measures, as well as the end-to-end consumer journey.

Digital maturity and effectiveness scores are matched to five digital percentile stages – as defined below – in which to measure growth through interventions.

Digitally Aware (0–19)

The organisation has taken the first step to be part of the Digital Futures programme but is not quite ready to meet the increasing demands and expectations of a digital world. A focus on its people, processes and infrastructure can put it on the path to success and align it with peers.

Digital Foundations (20–39)

The organisation has some elements of digital in place but to align it more with peers, the main recommendation is to review its digital strategy to identify where it is heading and where best to focus attention next.

Digital Experimenter (40–59)

The organisation is already making some great advances in digital. A committed and ongoing investment in digital from the top will accelerate business performance and put it ahead of peers.

Digitally Established (60–79)

The organisation is already benefiting from operating a successful digital model. It is harnessing digital more than most peers but there are still opportunities to stand out, deliver more return and lead the way through greater automation and innovation.

Digital Leader (80+)

The organisation is already making digital deliver significant business performance and setting the benchmark for peers to follow. As digital continues to evolve, it must ensure it can constantly adapt to stay on top.

To enable comparison of our sector with others, some additional questions were included that were identical to those asked in the 2024 Charity Digital Skills Index.

Questions

Participants were asked a core set of 49 questions across the five areas of digital. If you've completed the survey, you can see your score for each of these questions compared to the sector. Access your scores or complete a survey here.

Organisational Model

Q1	What types of products, services, information or support do you provide to your audiences? –15%
Q2	How can your audiences buy or book your products or services? +4%
Q3	How digitally-savvy and digitally-skilled are your people? –<1%
Q4	How is digital perceived and supported by the organisation? 10%
Q5	What's the state of your technical infrastructure? 11%
Q6	What best describes the version of your leisure management system you are currently using? (NEW)
Q7	Do you have any plans to change the version and/or provider of your leisure management system in the next 12 months? (NEW)
Q8	Do you have a digital strategy? 7%
Q9	To what extent is your digital strategy aligned with your overall business objectives? (NEW)
Q10	What's your approach to emerging technologies such as Artificial Intelligence (AI), Web3 and the metaverse? +18%
Q11	How do you use automation in your business processes? +10%
Q12	How agile to change is your organisation? +11%

Performance & impact

Q13	What level of engagement do you get with your digital experiences (such as email, websites, social media and apps)?	+9%
Q14	If you sell online, what proportion of your revenue does this make up?	–7%
Q15	How is digital used to create operational efficiencies?	+4%
Q16	How does digital influence participation or engagement growth with your products and services?	+5%
Q17	How does digital influence the retention of your audiences?	–4%
Q18	How does digital influence the social impact you make?	+2%
Q19	What consideration have you made to the environmental impact of digital technology?	+50%
Q20	How are you supporting the sector to grow its digital maturity & effectiveness (beyond your organisation)?	–16%
Q21	What projections do you have about the future impact of digital?	+14%

Data & Insights

Q22	What data do you collect explicitly and implicitly from audiences?	+5%
Q23	What do you do with data you collect from audiences?	–2%
Q24	What do you know about your target audience?	+6%
Q25	What's your approach to open data (e.g. OpenActive, Active Places, Open Referral, 360 Giving)?	–9%
Q26	What level of personalisation do you provide to your audiences?	–14%
Q27	What's your approach to data security & privacy?	+17%

Q28	How do you use data to provide business reporting?	+16%
Q29	What's your approach to testing and learning to improve digital experiences?	+2%
Q30	Do you use audience insights to inform trends and how best to respond to them?	+4%
Q31	What's the state of your audience database / CRM?	+11%

Digital experiences

Q32	How do people find your digital channels?	+8%
Q33	How easy to use are your digital experiences?	-7%
Q34	How joined up are your digital experiences?	+2%
Q35	What's the state of your website(s)?	+5%
Q36	Do you provide any virtual experiences?	-16%
Q37	Do you provide any apps?	+8%
Q38	Do you provide any connected experiences?	-7%
Q39	How do you use email and other types of direct messaging (e.g. SMS, WhatsApp, Messenger)?	-2%
Q40	How do you use social media and online communities?	+3%
Q41	What presence do you have on third party websites and apps?	-10%
Q42	How do you maintain and evolve your digital products?	+1%

Accessibility, inclusion & satisfaction

Q43	How much is your organisation talked about on social media, forums, blogs and other third party sites?	+19%
Q44	How is your audience reviewing and rating you online?	+2%
Q45	What do you know about how satisfied your audience is?	+1%
Q46	Do you use digital for customer service?	-2%
Q47	How accessible are you to people who have limited digital skills or capabilities?	-1%
Q48	How accessible are you to people who are new to the sector?	+6%
Q49	How do you support consumers in the end-to-end journey through digital?	+7%

With thanks

This year's digital review of the sector would not have been possible without the generous support of the following organisations:

Sport England
For funding, promoting, and consulting throughout.

Digital Strategic Partners
For their continued funding and support on this and other ukactive programmes.

Digital Contributor Partners
For their continued funding and contribution on this and other ukactive programmes.

Specialist authors:

Changing your LMS – Alex Peacock (Leisure Labs)
What to do with AI: Ollie Bell (Ava – Adaptive AI Virtual Agents) & Andy Hall (Fibodo)
Understand your Target Customers – Jon Nasta – (Stronger Strategies)

Big Bee Content
For copywriting and editing the content of this report, and co-creating other Digital Futures publications.

Participating fitness and leisure operators
For contributing to interviews and surveys.

ukactive

ukactive is the UK's trade body for the physical activity sector, bringing together more than 4,000 member organisations and partners in our shared ambition to get More People, More Active, More Often.

From gyms, leisure centres, studios, sports bodies and other activity providers, to major health bodies, consumer brands, tech firms and equipment manufacturers, our community collaborates across the private, public and third sectors.

ukactive facilitates high-impact partnerships, conceives and drives breakthrough campaigns, conducts critical research and lobbies the Government to recognise the power of the physical activity sector to address today's biggest issues – including reducing the burden on the NHS and social care, reducing crime, revitalising our high streets, and tackling loneliness.

If you have any media enquiries in relation to these findings, email info@ukactive.org.uk.

Rewrite Digital

Rewrite Digital is a strategic consultancy that helps organisations keep the pace of digital change. Its comprehensive framework for measuring digital maturity and effectiveness enables organisations and sectors to see where they are now, where they need to head and benchmark themselves with peers and over time.

Rewrite Digital has partnered with ukactive and the Digital Futures programme since 2021 to conduct annual digital reviews of the fitness, leisure and sport sector, report on the findings and support the sector and individual organisations to grow their use of digital.

In 2024, Rewrite Digital introduced a new service, Room 42, using Design Thinking approaches to facilitate change and innovation, further supporting organisations in the sector to grow their digital maturity and effectiveness.