

The National Post Lockdown Recovery Survey Summary report

May 2020



Leisure-net
Solutions Ltd

In Partnership with:



The Survey in numbers



88
PRIVATE
HEALTH CLUBS



43
OPERATORS



18
IN HOUSE



21
LOCAL
TRUSTS



3 EXTERNAL
PARTNERS



550+
& LEISURE CENTRES
HEALTH CLUBS



65K+
RESULTS

+15 Critical questions
giving you the
answers you need
before reopening

How important is this research to the sector?

“ It was vitally important for both head office and our franchisees to have a clear understanding about how our members were feeling in terms of returning to our clubs. It means we can make informed decisions when relaunching the sites and ensure members feel safe and secure to kickstart their member journey once gain. The information received has been super positive and put many minds at rest for the future success of our clubs. ”

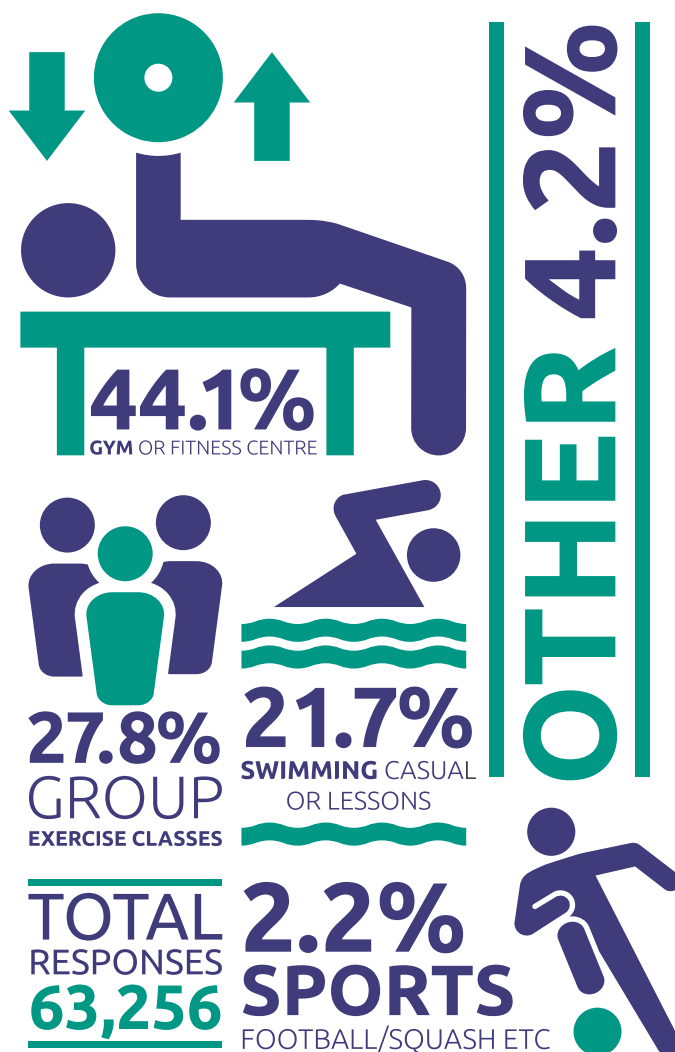
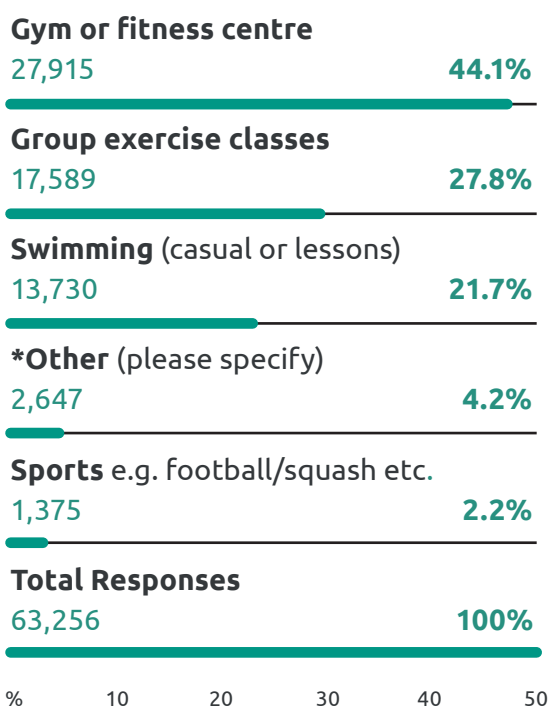
Lucy Brookes, Divisional Operation Manager
England & Wales at Energie Fitness Group



Gym, Group Exercise and Swimming were customers main activities before lock down..

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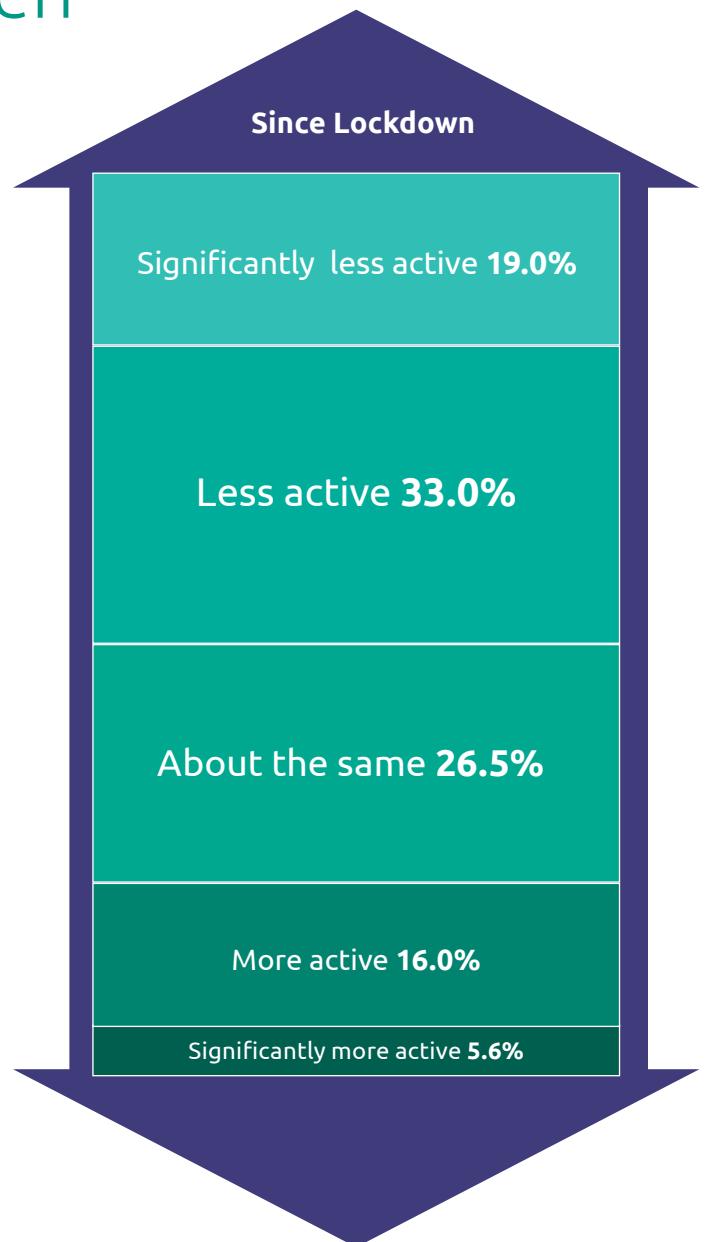
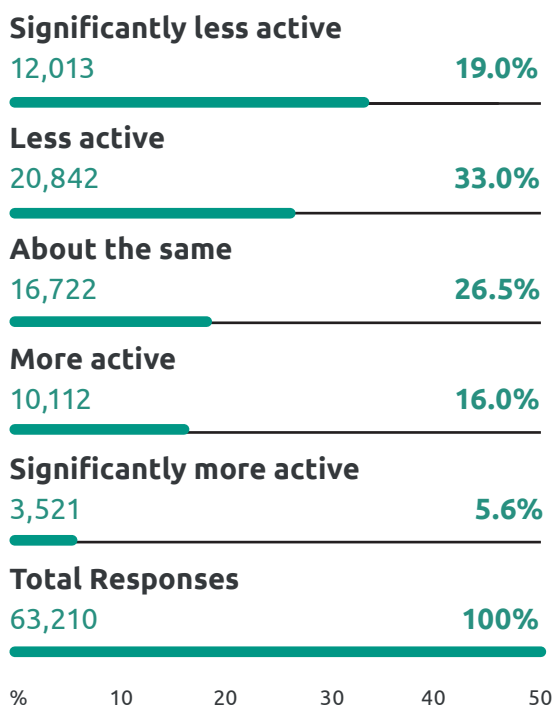
Before your leisure/sports centre/gym went into lock down what was the main activity you participated in?



Activity levels have significantly reduced, with 52% of respondents stating that they have been less active since the lockdown, with only 22% saying they have been more active

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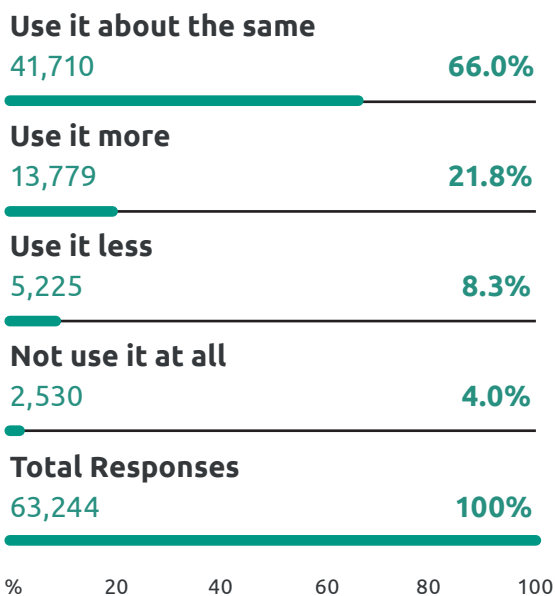
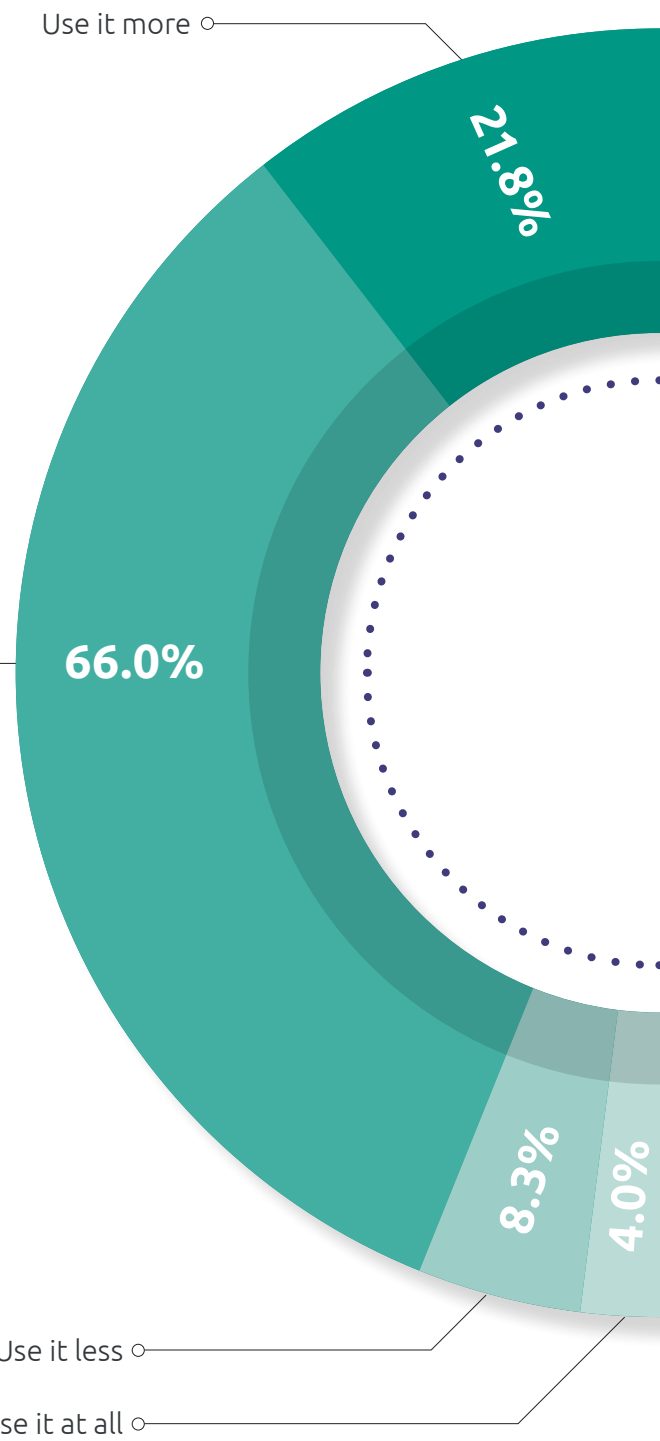
Since your leisure/sports centre/gym went into lockdown would you say that you have been...?



88% will use their centre/club more or the same when it reopens with 8% using it less and only 4% saying they will not return



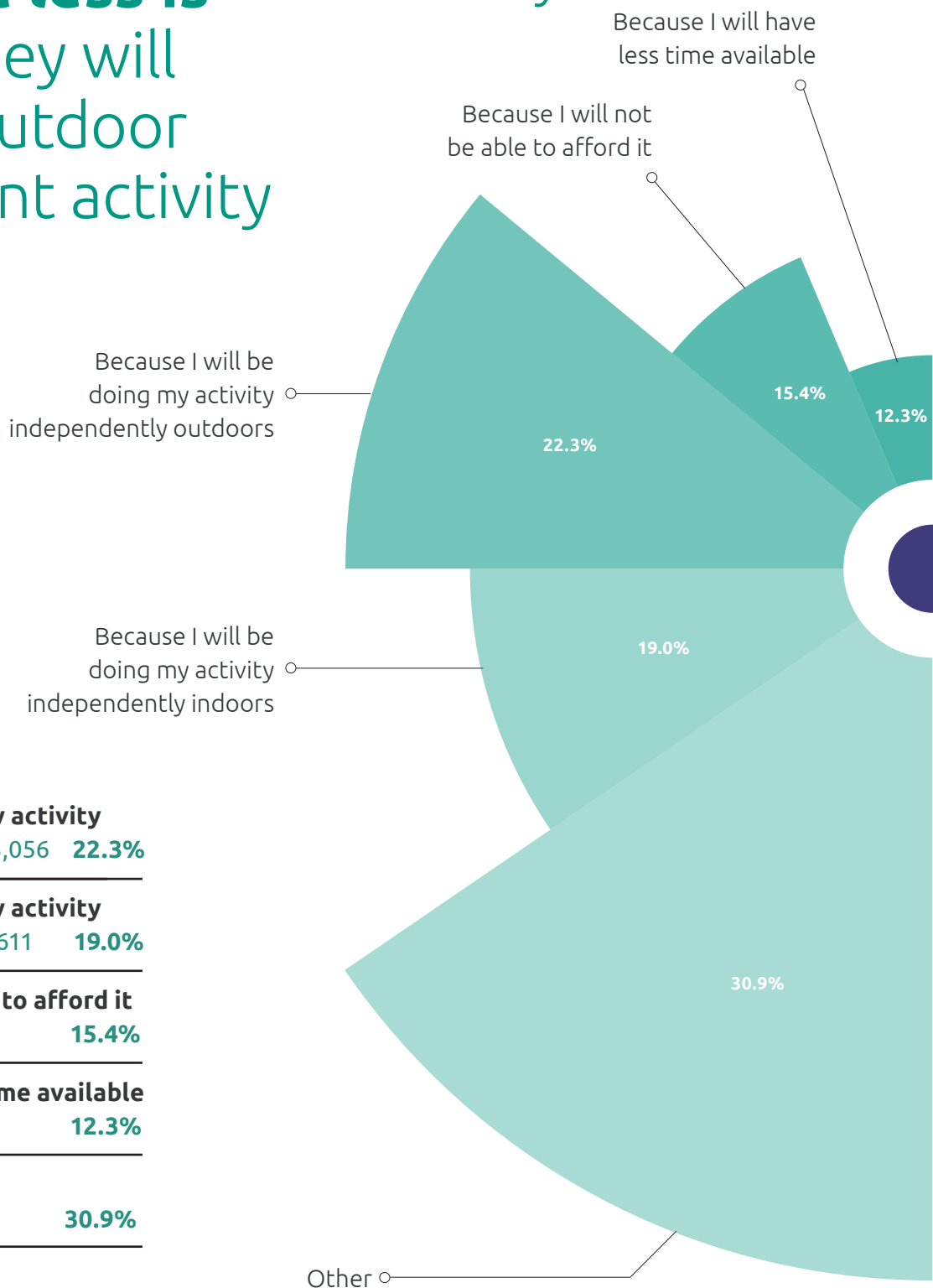
When your leisure/sports centre/gym reopens, do you think you will...?



The main reason customers will be using it less is because they will be doing outdoor independent activity



If Not at all or Less, then why?



Because I will be doing my activity independently outdoors 3,056 **22.3%**

Because I will be doing my activity independently indoors 2,611 **19.0%**

Because I will not be able to afford it 2,113 **15.4%**

Because I will have less time available 1,690 **12.3%**

***Other (please specify)** 4,240 **30.9%**

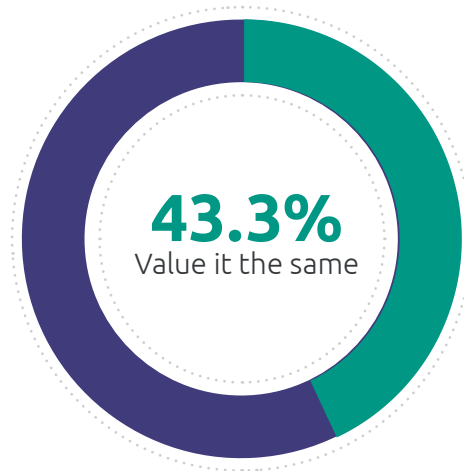
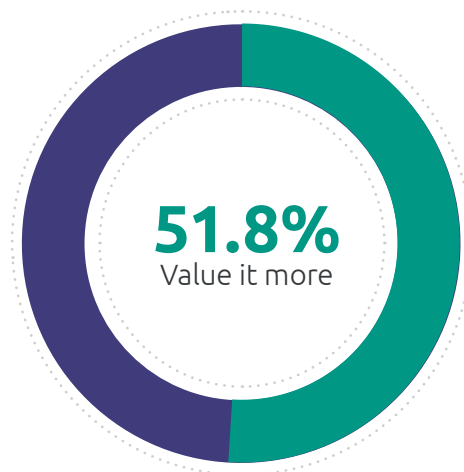
Total Responses 13,710 **100%**

% 10 20 30 40 50

Over half of customers state they will value their centre/club more when they return

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Do you think you will value your leisure/sports centre/gym more when you return?



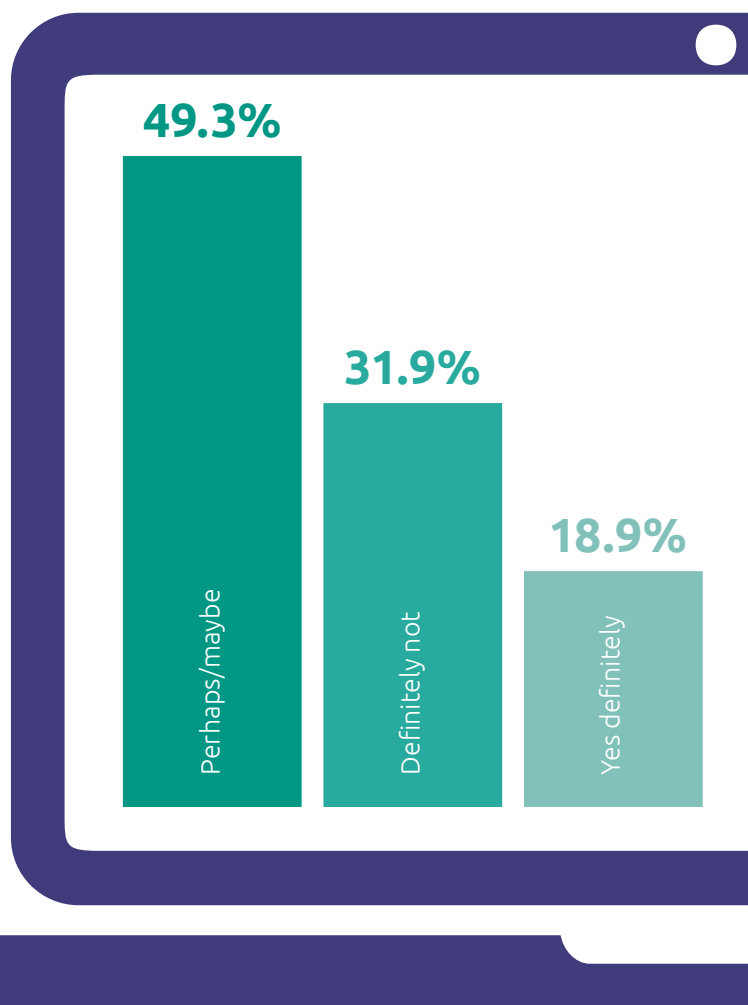
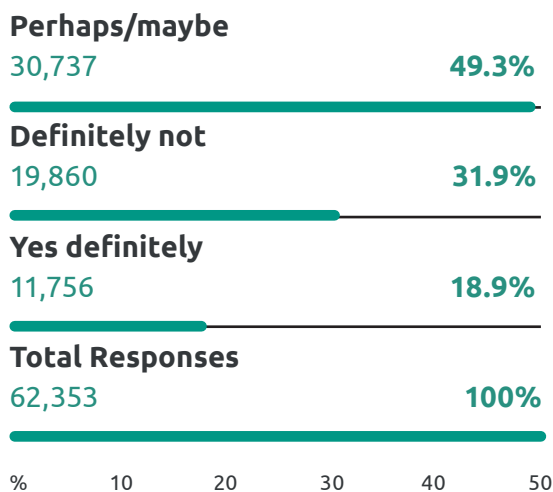
Value it more	32,479	51.8%
Value it the same	27,139	43.3%
Value it less	3,114	5.0%
Total Responses	62,732	100%

% 10 20 30 40 50

Digital offering will be important to a significant minority of returning customers

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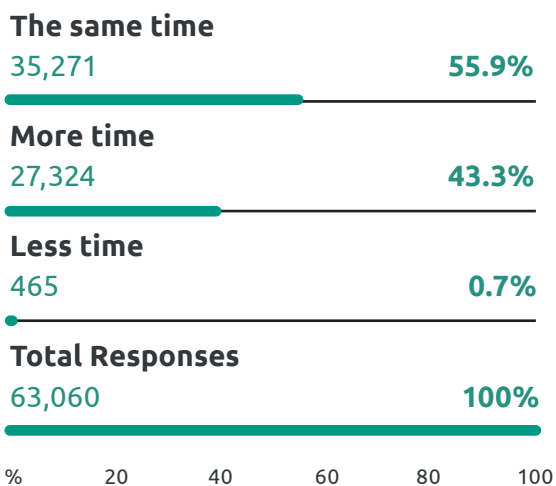
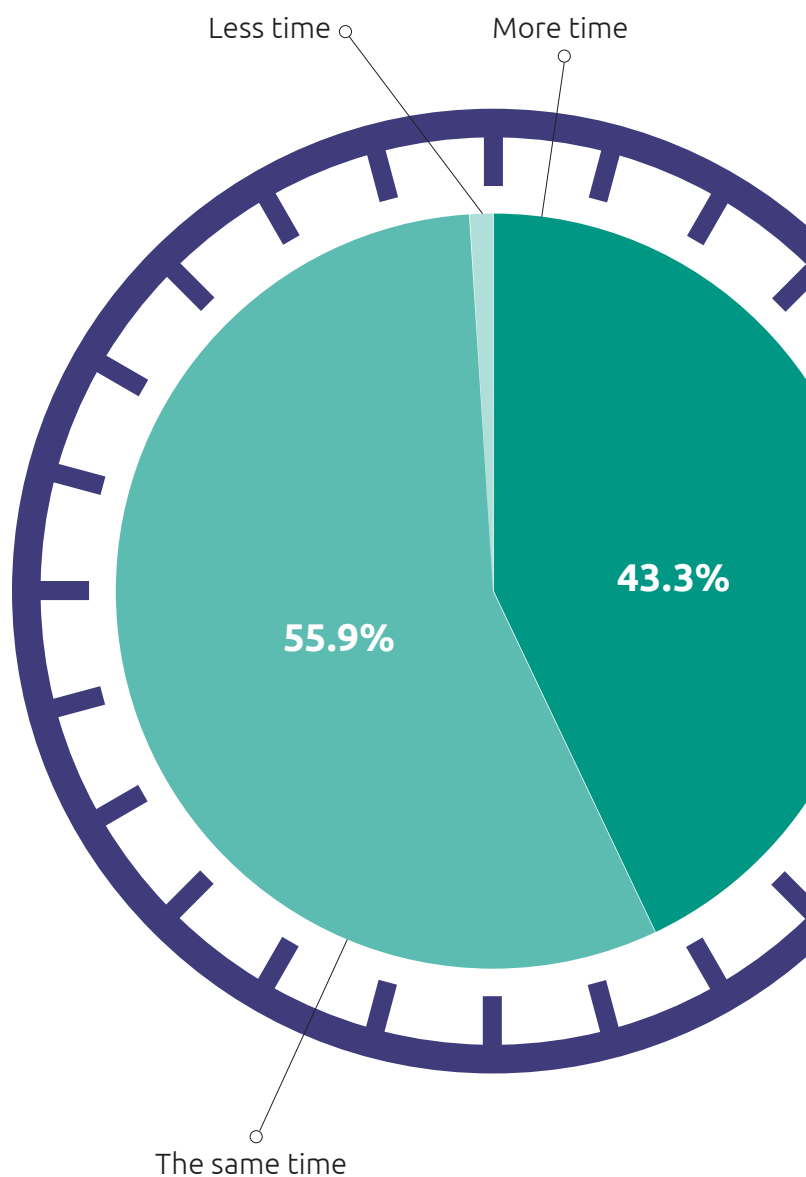
Would you be more likely to go back to using your leisure/sports centre/gym if it offered online classes as part of their membership offer?



Over 40% of customers will be prepared to spend more time on being active

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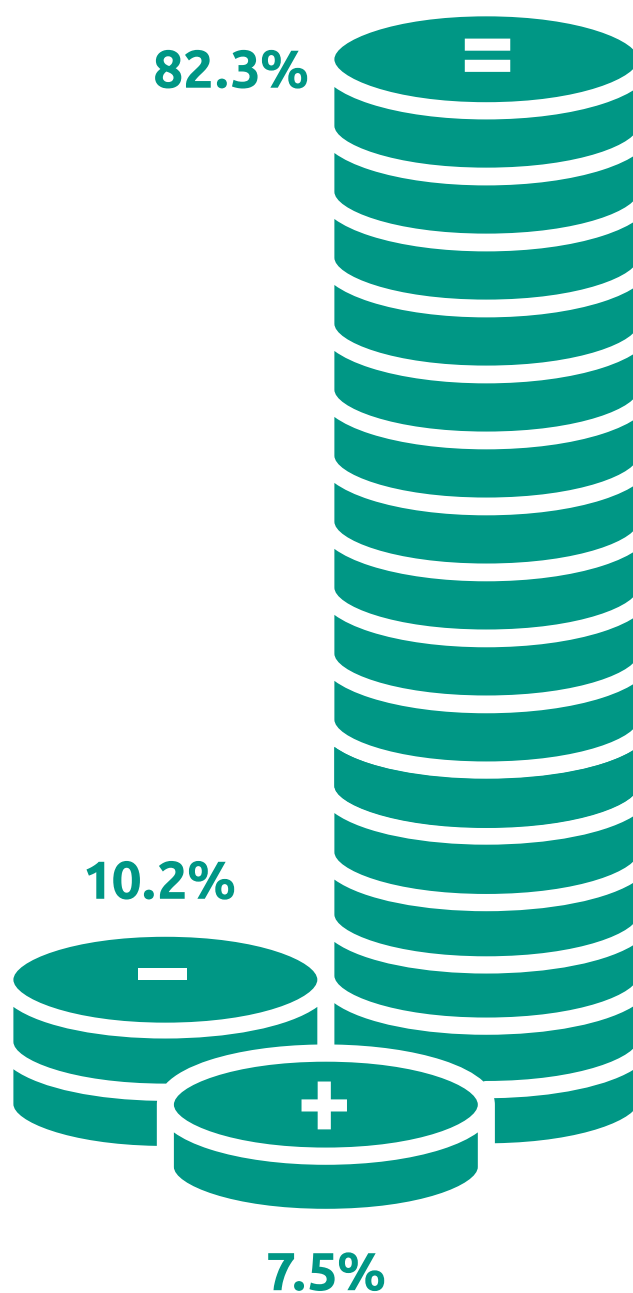
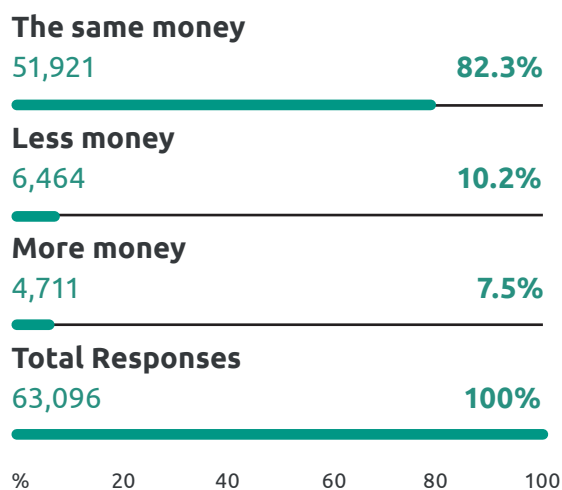
Looking forward would you say you are prepared to allocate more time to your health and wellbeing through sport, exercise and being active?



But they are not prepared to spend more money on being active

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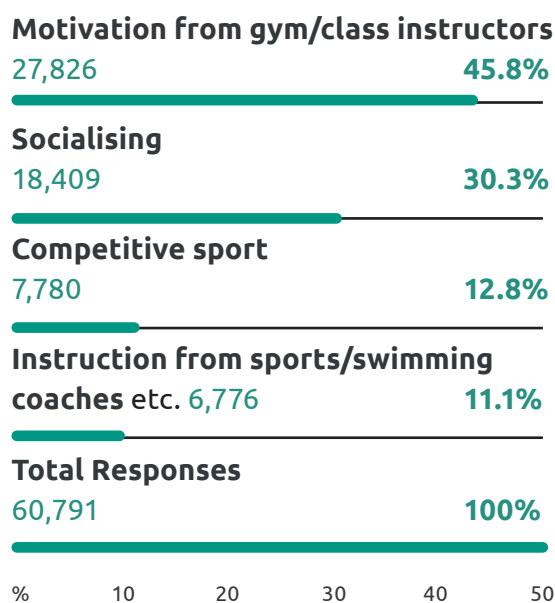
And would you say you are prepared to spend more money on your health and wellbeing through sport, exercise and being active?



The main thing customers are missing is motivation from gym/class instructors



What would you say you are missing most while not being able to use your local leisure/sports centre/gym?



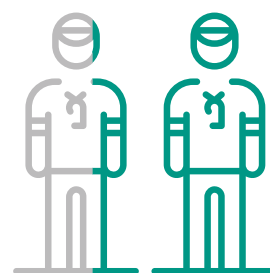
45.8%
Motivation from gym/
class instructors



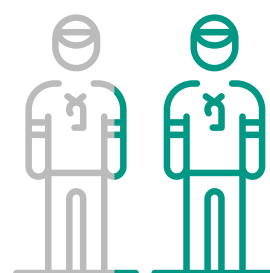
30.3%
Socialising



12.8%
Competitive sport



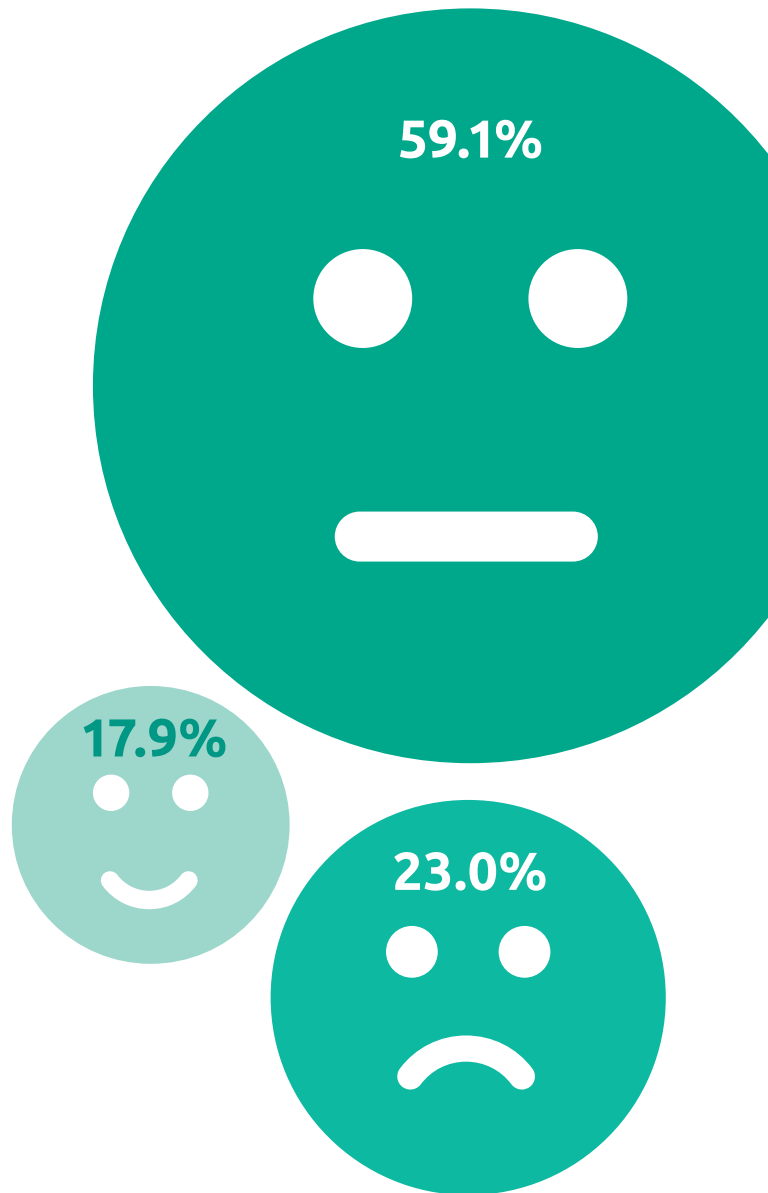
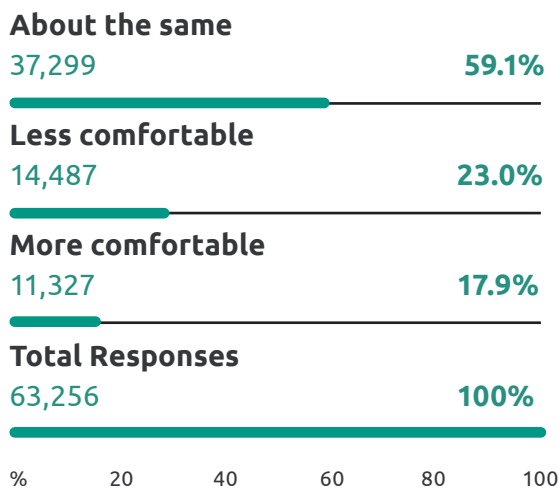
11.1%
Instruction from sports/
swimming coaches



Customers feel slightly less comfortable about returning to their centre/club than to other leisure facilities



How comfortable do you feel about returning to your leisure/sports centre/gym, compared to other leisure facilities such as libraries, garden centres, bar...?



Cleanliness is the N1 factor in terms of importance for customers when they return



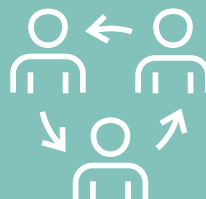
Which of the following will be very important to you when you come back?

31%



The cleanliness

25%



Procedures and processes

22%



Friendliness of staff

22%



Support and guidance

The cleanliness of the centre

57,246 31%

New procedures and processes to implement social distancing measures (if required/recommended) 46,422 25%

The friendliness of the staff

39,932 22%

The support and guidance given by the staff 39,536 22%

Total Responses

183,136 100%

% 10 20 30 40 50

Key Insights and Recommended Actions from our “Bounce Back” Partners, are available in the full report which can be purchased below



Financial/strategic : Lisa Forsyth – Max Associates

Programming/pricing : Chris Philips – 4global

Customer experience : Mike Hill – Leisure-net

Marketing/communications : – Tom Gozna – Bigwave Media

The full report can be purchased for just £100 (ex vat), and gives you a complete breakdown of all questions by age and gender. To order just go to leisure-net.org/report

To discuss how this research can help your business bounce back when reopening, or if you require particular cross tabulated reports, please contact

David Monkhouse on davidmonkhouse@leisure-net.org



Leisure-net
Solutions Ltd



Max Associates – Are supporting local authorities and operators understand how the impact of Covid will influence the positioning and delivery of sport and physical activity services in the medium and longer term; including service outcomes, financial and contractual perspectives.

Contact Lisa or Mark on
lisa@max-associates.com or Mark@max-associates.com

4global – Our range of recovery solutions are aimed to help you plan and manage the new normal for your organisation. We can apply the learnings from this survey together with your facility and sector-wide data to trigger and grow revenue streams in your business. Helping you to know what to expect for your business and create a structured plan for re-opening. Stimulate customer confidence to secure the future of your facilities and measure the impact of your localised targeted plan to come back stronger in the new future.

Contact Chris Phillips on
chris.phillips@4global.com for more information

Leisure-net – Providing 1 hour online Bounce Back sessions for senior management teams wishing to fully understand the findings from this research and its implications for the Customer Experience you need to provide for returning customers.

In addition we can provide detailed cross tabulation of the dataset if you would like to understand more about how different ages, genders etc have responded to the questions.

Contact David Monkhouse on
davidmonkhouse@leisure-net.org for more information

Big Wave Media – Providing bespoke marketing campaigns, communication advice and support to re-engage members, prospects and the wider community as the industry looks to bounce back. We have also developed a wide range of branded COVID-19/social distancing signage solutions to ensure safety and consumer confidence as facilities start to reopen.

Contact Tom Gozna on
tomgozna@bigwavemedia.co.uk for more information

