Moving Communities:
Active Leisure Trends
2018 Report



Introduction

ukactive Research Institute

The ukactive Research Institute is excited to present the second Moving Communities: Active Leisure Trends Report, looking at the broad trends and themes that we are witnessing across the public sector leisure landscape.

At the Research Institute a primary focus of our work is to transform data across the sector into meaningful and actionable insight. This enables us, and the members and partners we work with, to make evidence based decisions to support our mission to get more people, more active, more often.

This report has been created by the Research Institute, using aggregated data supplied by the DataHub. Last year we were able to report on real life data from 315 sites. This year the data set has been expanded, with data from 396 sites providing an even more rigorous and comprehensive picture of community leisure across the UK. This equates to over six million members across three financial years, and represents nearly 150 million visits by both members and casual users over the last three years.

In this report we will explore four key areas- who is using leisure centres, when are they using them, what are they doing, and how this differs across key customer segments. We will take a look at trends data from the last three years to investigate how the sector is changing, as well as taking a more in depth look at year to date data from 2018 to see what is happening right now.

Some aspects of the leisure landscape remain unchanged from last year, such as the gender split of the total leisure centre membership base. There is sign of change in other areas, with a slight increase in the average age of adult members and a selection of group workout classes that have seen huge growth over the last few years.

It is only through understanding the movements, changes, and fluctuations within this landscape, and utilising the market intelligence available to us that we - as a sector - will be able to adapt and change to the needs and desires of consumers. We hope you find this report useful and we look forward to working with you to further support the growth and vitality of the sector.

DataHub

Since the first Moving Communities report in August 2017, DataHub's objectives haven't changed. Our primary goal in working with ukactive to develop and manage the Moving Communities report remains addressing the wave of inactivity we face; getting the nation more active and healthy by giving the industry up-to-date insight into what good looks like, what works and what doesn't. However, the amount of data we are able to access and share has changed dramatically. Our repository now draws valuable, actionable information from more than 2,000 leisure centres and sports venues and we are fast approaching the milestone of tracking 500 million facility visits.

With more than seven million leisure centre members and active participants now being tracked, the DataHub is by far largest repository of activity data in the UK, meaning the industry can trust that all the insight and evidence generated is accurate. And with 5,000 individuals that work in the sector all logged in and using the DataHub on a regular basis, we know it's helping organisations to make informed judgements using real-time evidence at the very point of decision.

In the last year, we have continued forming partnerships with key sector organisations and individuals, including creative growth and marketing agency, Big Wave Media, global retention expert, Dr. Paul Bedford and leading sector consultants Guy Griffiths and Ray Algar, to enable us to give value back to operators and sports delivery partners. Alongside this, our strong partnership with ukactive – focusing on publications, joint products and sector partnerships – has been a very important focus and allowed us to reach a much larger market.

The DataHub continues to work with National Governing Bodies and County Sports Partnerships to allow us to better understand the sector from a sports and geographical focus, as well as with leading technology providers such as Xn Leisure, Gladstone, Legend and Delta, and data capture partners on the sport for development programmes including Views and Upshot, to extend the DataHub beyond leisure centres and create an all-encompassing nationwide activity profile.

Our hope for the coming year is that our second snapshot in time, presented on behalf of DataHub Partners and the Steering Group, alongside our live data reporting, will help everyone in the sector to collaborate more effectively and expertly exploit the potential of their assets to create a more relevant offer that truly reflects their communities needs and gets more people, more active, more often.

How has the data changed since last year?

The data sample has increased in size from last year, from 315 sites to 396. This means that the data set we reported on last year has been enhanced and improved by an additional 81 sites, allowing even more rigorous analysis of the leisure landscape. As new sites join the DataHub this adds to the historical store of data, and also means that the sample size can increase every year.

As a result, some of the specific detail we reported last year will have changed as we are now looking at a larger data set for the entire three year period. The figures in this report offer the latest insight into trends in the industry, both for 2018 and for the last three years.

It's also worth noting that only sites that have sent data consistently every month since January 2015 were included in the data set to allow like-for-like comparisons.

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

Executive Summary

Who?

>> The mean age of members is increasing slightly, reaching 39 years 11 months in FY18.

>> Females continue to represent just over half (52%) of the total leisure membership.

>> Females are slightly older than males on average- 40 years and 4 months compared to 39 years and 4 months.

>> Like last year, younger age groups make up more of the membership than they do of the total national population.

>> This means older age groups are again under-represented, with 2% of members aged 75+, compared to 10% of the population.

>> The membership base is more ethnically diverse than the general population.

>> Just 6% of members come from areas in the lowest decile of deprivation, a decrease on last year.

When?

>> Over the last three years, Tuesday has been the most popular day to visit the gym, with 16% of visits taking place on this day.

>> Over the last three years, Saturday has been the least popular day to visit the gym, with 12% of visits.

>> The most popular visit time over the last three years has been 10am and 6pm.

>> The older age groups have a much higher percentage of their visits during the week.

>> The older age groups also have the highest percentage of visits in the late morning time slot.

>> Females are more likely to visit in the late morning than males (33% of visits compared to 22%).

>> Casual users are more likely to visit at weekends (29% of visits compared to 20% for members).

What?

>> There are over 50 different activity types represented in the data set.

>> Swimming, group workouts and fitness makes up 80% of all visits to leisure centres.

>> Swimming is the most frequent reason for visiting, but the percentage of visits for swimming has declined slightly again, to 39% of all visits.

>> There were over 75 group workouts in the data set. Spinning/ indoor cycling was the most popular class for the third year in a row.

>> Some classes have seen growth of over 200% from 2016 to 2017, including Body Works and Pump FX.

>> Overall, football is the most popular sport to play at leisure centres, but for members the most popular is badminton.

>> Nearly two thirds of casual visits to leisure centres are for swimming (65%).

How?

>> Group workouts are far more popular for females than males, making up 38% of overall visits compared to 14%.

>> For males, fitness is most popular making up nearly half of overall visits (46%), compared to 28% for females.

>> Badminton is the most popular sport for both male and female members.

>> Swimming rises in popularity with age, with this making up 39% of visits for 75+ compared to just 8% for those aged 16-24.

>> Aside from 75+, badminton is the most popular sport for members of all ages.

>> There are some slight differentials in the most popular sports for members grouped by age and gender- dance and Tai Chi are popular for older female members, and golf and bowls for older male members.

Who?

With the larger sample of 396 sites now included in the analysis, we now have a bigger data set of over 6 million members totalled across the last three financial years. The number of total members exceeded the two million figure in FY17, and has remained at this level for FY18. The member base has remained relatively constant over the last three financial years.

TOTAL MEMBERS IN SAMPLE

FY16 1,966,565 → +5% → FY17 2,056,473 → -3% → FY18 2,004,324

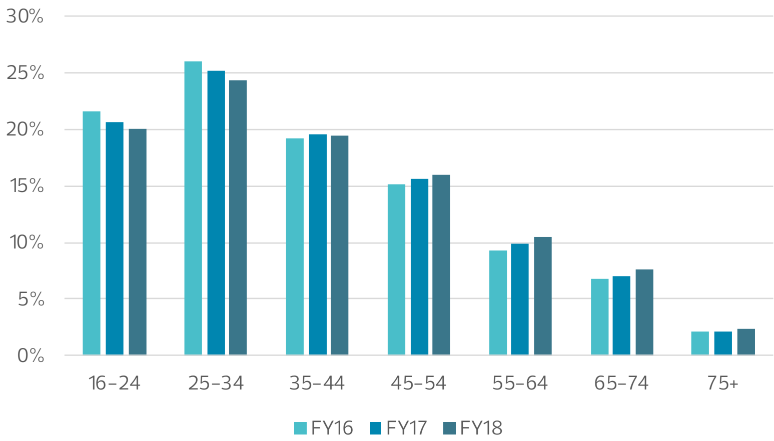
Age of members

The table and graph below show the age distribution of adult members (classed as those aged 16+) over the last three financial years. Any ages reported as over 110 years have been excluded. The data shows the age distribution of adult members has remained fairly constant over the past three financial years, with only minor year to year changes. The latest FY18 figures show the 25-34 age group as representing the largest section of members, with 24% of total members. The 75+ age group continues to makes up only a very small percentage of the overall members. There has been very slight increases in the percentage in the 55-64 and 65-74 age groups. This is also reflected in the increase in mean age of adult members, up to 39 years and 11 months from 39 years and 4 months.

Table 1: Age groups as percentage of total adult members

	FY16	FY17	FY18
16-24	22%	21%	20%
25-34	26%	25%	24%
35-44	19%	20%	19%
45-54	15%	16%	16%
55-64	9%	10%	10%
65-74	7%	7%	8%
75+	2%	2%	2%

Graph 1: Adult member figures by age group



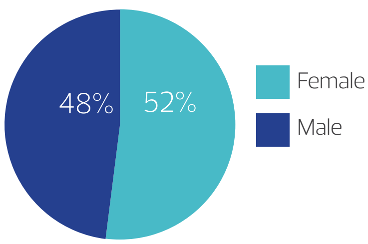
Mean Age	FY16: 38 years 10 months	FY17: 39 years 4 months	FY18: 39 years 11 months

Modal Age	FY16: 25 years	FY17: 26 years	FY1: 27 years

Gender of members

The gender split of the membership base remains unchanged for the third year in a row, with females representing 52% of all members.

Graph 2: Gender breakdown of members



Age comparison to national figures

As explored last year, there is a disparity in the age distribution of leisure centre members compared to the population of the UK. The table below shows the distribution of the FY18 members and the UK wide population breakdown, based on the 2016 ONS Mid Year Estimates.

The difference is particularly prevalent in the younger and older age groups, with 75+ making up 10% of the UK population but 2% of the leisure centre population. Conversely, the 25–34 age group make up 17% of the UK population but represent 24% of members.

Graph 3: Adult members compared to UK figures

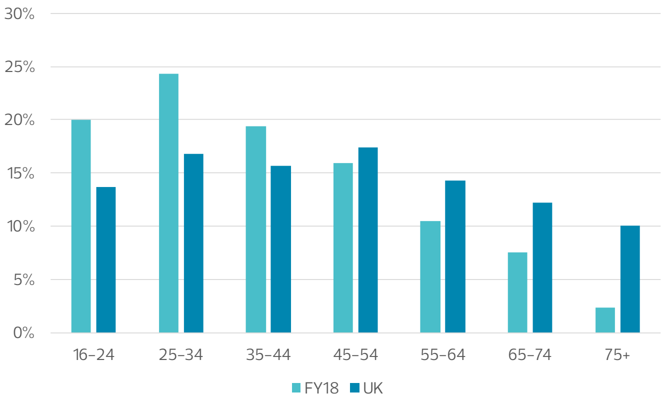


Table 2: Age groups as percentage of total adult membership

	FY18	UK
16–24	20%	14%
25–34	24%	17%
35–44	19%	16%
45–54	16%	17%
55–64	10%	14%
65–74	8%	12%
75+	2%	10%

Gender–Age breakdown

By combining the age and gender stats we can identify if some demographic pockets are particularly well represented and if there is a difference between the ages of male and female members. The graph below shows that there is a slight skew towards the younger age groups for male members. This is confirmed through the average (mean) age of males being one year younger than females, at 39 years and 4 months compared to 40 years and 4 months.

Graph 4: Gender and age breakdown of members

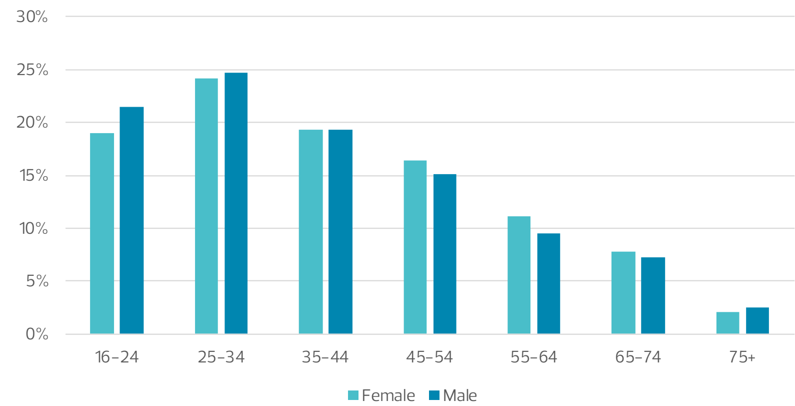


Table 3: Gender and age breakdown of members

	Female	Male
16–24	19%	21%
25–34	24%	25%
35–44	19%	19%
45–54	16%	15%
55–64	11%	10%
65–74	8%	7%
75+	2%	3%

Mean Age	
	Female: 40 years 4 months
	Male: 39 years 4 months

Modal Age	
	Female: 27 years
	Male: 27 years

Ethnicity of members

The table below shows the ethnicity information of those who have provided this information, as well as the UK wide figures from the 2011 Census. These figures show little change in the ethnicity of members over the last three years, but the comparison against the UK figures show a more ethnically diverse breakdown than the UK as a whole.

Table 4: Ethnicity of membership as a percentage of total members (excluding Not Given and Unknown)

	FY16	FY17	FY18	UK
White	74%	74%	73%	86%
Asian	12%	13%	14%	8%
Black	8%	8%	9%	3%
Mixed	4%	4%	4%	2%
Other	1%	1%	1%	1%

Social deprivation of members

A social deprivation ranking has been calculated for members in England who have supplied postcode data. This has been matched to an index of social deprivation. This is a government tool which measures the relative deprivation of a local area using the following factors:

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

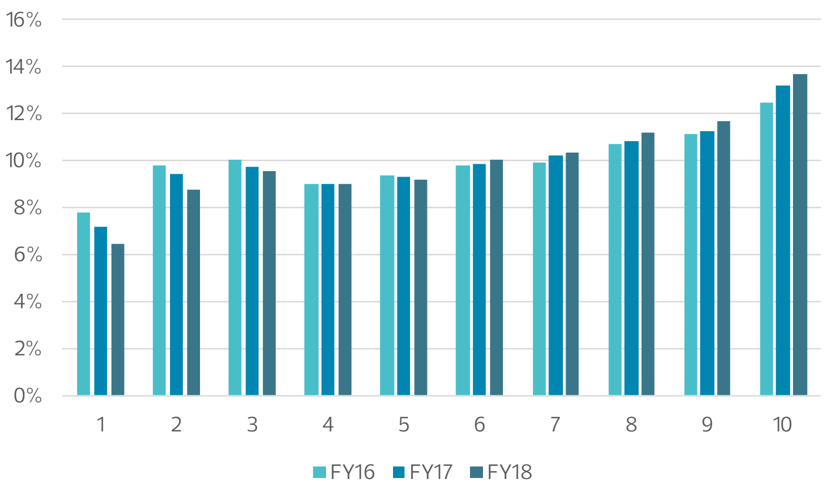
These factors are weighted for over 30,000 small areas in England. These areas can be ranked from 1 to 10, with 1 representing the 10% of areas that are most deprived and 10 representing the 10% of areas that are least deprived. The tables below show the percentage of members who fall within each of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

The table and graph below show that the most deprived 10% of England continue to have the lowest percentage of overall members (6% in FY18). The least deprived 10% now have 14% of overall members, up from 13% in FY17 and 12% in FY16. Although these are only marginal changes, this trend should be carefully monitored to ensure access to sport and leisure is available to those of all economic backgrounds.

Table 5: Percentage of members in each decile of the Social Deprivation Index

IMD	FY16	FY17	FY18
1	8%	7%	6%
2	10%	9%	9%
3	10%	10%	10%
4	9%	9%	9%
5	9%	9%	9%
6	10%	10%	10%
7	10%	10%	10%
8	11%	11%	11%
9	11%	11%	12%
10	12%	13%	14%

Graph 5: Percentage of members in each decile of the Social Deprivation Index



When?

Using information on the day and time that members and casual users are visiting the centre we can start to build up patterns of useage and identify which are the most popular times to visits and when are quieter periods. The data set contains records from nearly 150 million visits over the last three financial years. As in the previous section, this data was extracted from 396 sites. Within the data set visits are made up of two elements:

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

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

Day of the week of visits

Since 2016 over **147 million visits** have been made to the leisure centres included in this analysis. For three years in a row, Tuesday has been the most popular day to visit, with an average of 16% of visits taking place on this day over this time span. Saturday is the least popular day to visit when looking at the data from the entire three years with 12% of visits, but in 2018 Sunday has been marginally less popular so far.

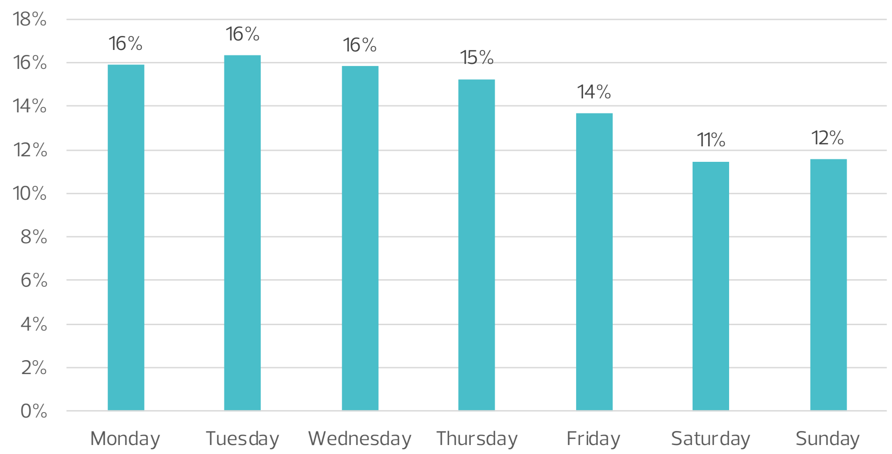
Visits at the weekend are again lower than those during the week. This is an interesting trend that has confirmed what we saw last year. Despite the weekend being a time that is associated with people having free time, members are instead opting to make the bulk of their visits during the week, typically around a working day. At the weekend, visits to leisure centres are hav-ing to compete with a range of other sport, leisure and recreation activities.

Table 6: Visits on each day of the week as a percentage of overall visits

Day	2016	2017	2018 YTD	Overall
Monday	16%	16%	16%	16%
Tuesday	16%	16%	16%	16%
Wednesday	16%	16%	15%	16%
Thursday	15%	15%	15%	15%
Friday	14%	13%	14%	14%
Saturday	11%	11%	12%	11%
Sunday	12%	11%	12%	12%

2018 YTD Most Popular Day	Tuesday
2018 YTD Least Popular Day	Sunday

Graph 6: Percentage of visits on each day of the week for the last three years



Time of day of visits

Looking at the time of day that visits are made to sites can identify peak and off peak timings and help with scheduling of classes and activities. For this analysis visits made between the hours of 5am– 11pm have been included. This is to ensure that where midnight (0) is used as a default option this does not skew the results. This amounts to a total of 79 million visits across the three years.

The most popular time to visit so far in 2018 is 9am, slightly earlier than the overall average of the last three years (10am). The second peak of the day is at 6pm– times which are sandwiched around a typical working day. These times have showed little change in the past three years, and neither have the least popular visit times. As expected, visits very early in the morning or very late at night are not popular. This reflects in only 1% of overall visits coming at 9pm or later.

Table 7: Visits on each hour of the day as percentage of overall visits

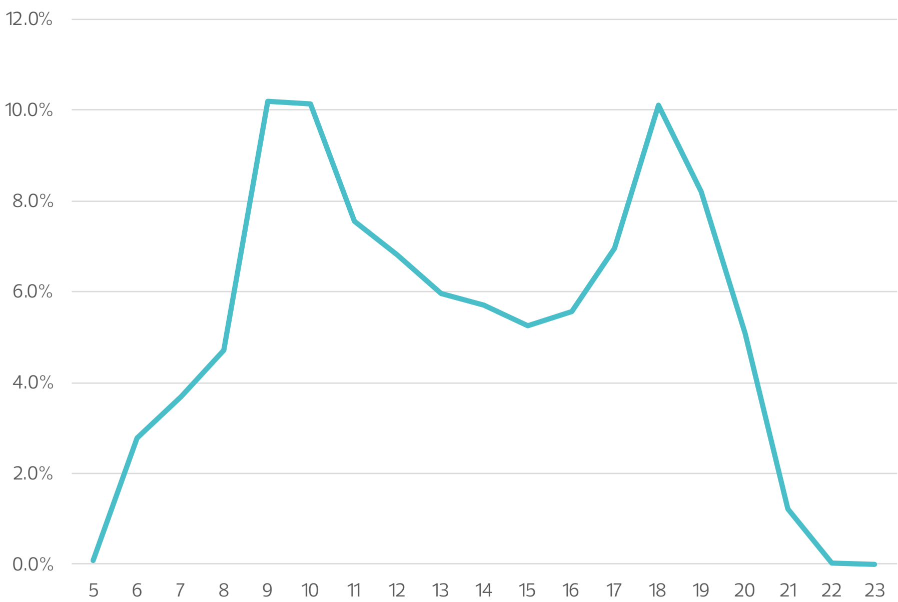
Time	2016	2017	2018 YTD	Total
05	0%	0%	0%	0%
06	3%	3%	3%	3%
07	4%	4%	4%	4%
08	5%	5%	5%	5%
09	9%	10%	10%	10%
10	10%	10%	10%	10%
11	7%	8%	8%	7%
12	7%	7%	7%	7%
13	6%	6%	6%	6%
14	6%	6%	6%	6%
15	5%	5%	5%	5%
16	6%	5%	6%	6%
17	7%	7%	7%	7%
18	10%	10%	10%	10%
19	9%	8%	8%	8%
20	5%	5%	5%	5%
21	2%	1%	1%	1%
22	0%	0%	0%	0%
23	0%	0%	0%	0%
Total	100%	100%	100%	100%

2018 YTD Most Popular	9am
Last 3 years Most Popular	10am
2018 YTD Least Popular Time	11pm
Last 3 years Least Popular	11pm

Table 8: Visits in each time band as percentage of overall visits (total)

Time	Total
Early morning (pre 9am)	11%
Late Morning (9am–12pm)	27%
Early Afternoon (12pm–3pm)	19%
Late Afternoon (3pm–6pm)	18%
Early Evening (6pm–8pm)	24%
Late Evening (9pm onwards)	1%

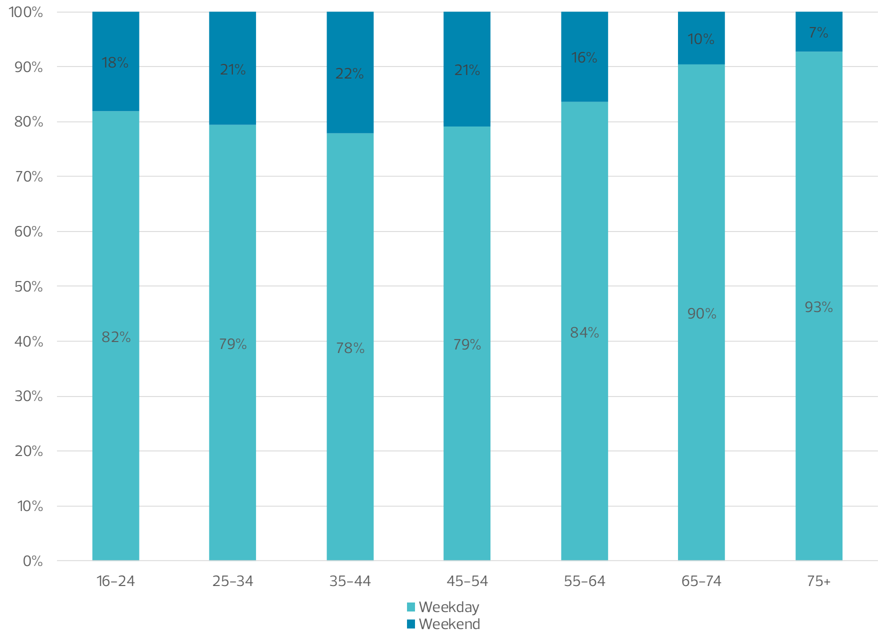
Graph 7: Percentage of visits on each hour of the day for 2018 YTD



Difference between ages

By looking at the 2018 YTD visit times of different age groups some patterns and clear differentials between groups start to emerge. In terms of day of the week of visits, the key difference again is that the older age groups make a greater percentage of their visits on weekdays. In the younger age groups as many as 22% of visits are made at weekends (35–44 years), but this reduces to 10% at 65–74 and 7% at 75+.

Graph 9: Proportion of weekday and weekend visits by age group



By looking at the time of day that different age groups visit the centre there are again some very clear contrasts. As illustrated below, in the two youngest age groups the highest percentage of visits was in the early evening slot (30% and 33% respectively). In the older age groups almost half of visits came in the late morning– 48% for 65–74 and 47% for 75+. This is important information when considering the scheduling of different activities for different demographics.

Graph 10: Proportion of visits by time per age group

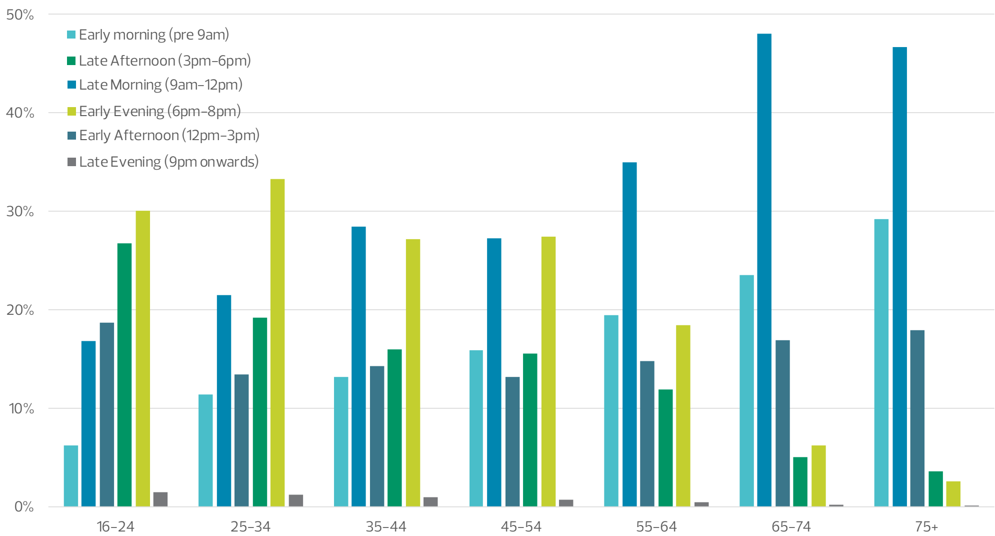


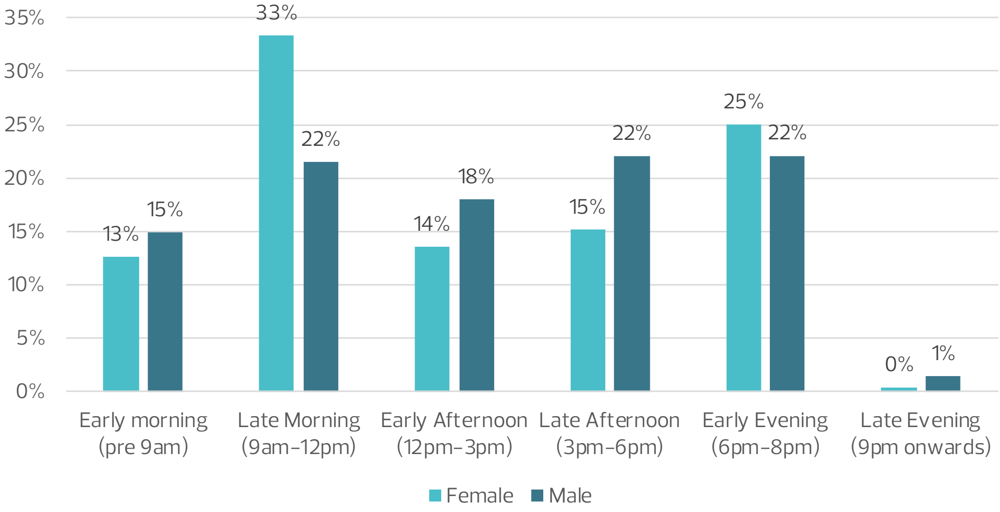
Table 9: Proportion of visits by time per age group

Time	16–24	25–34	35–44	45–54	55–64	65–74	75+
Early morning (pre 9am)	6%	11%	13%	16%	19%	24%	29%
Late Morning (9am–12pm)	17%	21%	28%	27%	35%	48%	47%
Early Afternoon (12pm–3pm)	19%	13%	14%	13%	15%	17%	18%
Late Afternoon (3pm–6pm)	27%	19%	16%	16%	12%	5%	4%
Early Evening (6pm–8pm)	30%	33%	27%	27%	18%	6%	3%
Late Evening (9pm onwards)	1%	1%	1%	1%	0%	0%	0%

Difference between genders

Looking at the time of visits by gender for 2018 YTD shows two key differences– a far greater percentage of female visits are made in the late morning slot– this makes up 33% of visits for females and 22% for men. It is the late afternoon slot where this trend reverses, with 22% of male visits taking place here compared with 15% of female visits.

Graph 11: Time of visit by gender



Difference between member visits and casual visits

Separating visits into those by members and those by casual users can enable us to see if there is a difference in the behav-iours of the two groups. This can help with establishing patterns of member behaviour.

The graph and table below show how behaviour differs between members and casuals, with casuals more likely to visit at weekends. This makes up 29% of their total visits, compared to 20% for non members. Members are also more likely to visit early in the week.

Graph 12: Percentage of visits on each day split by visit type

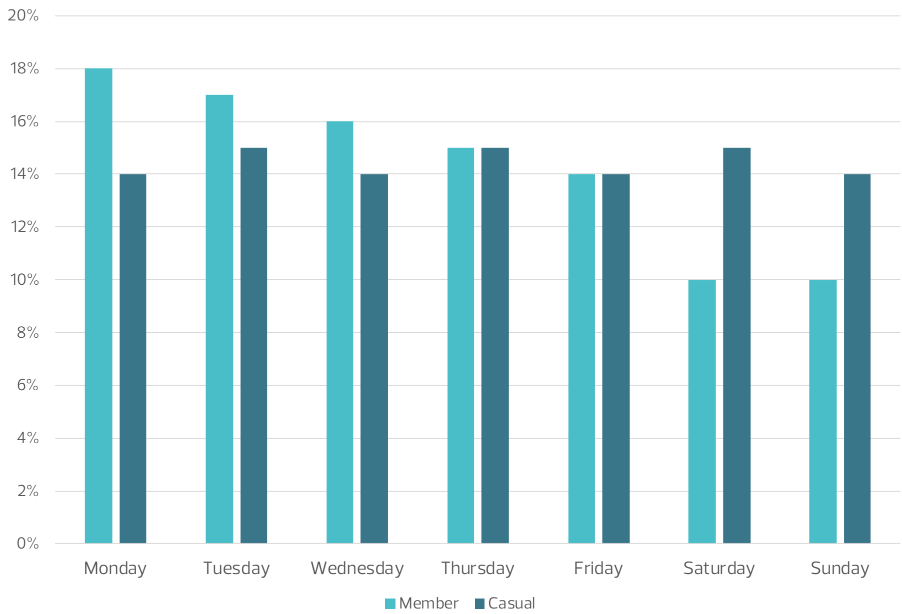


Table 10: Percentage of visits on each day split by visit type

	Members	Casual
Monday	18%	14%
Tuesday	17%	15%
Wednesday	16%	14%
Thursday	15%	15%
Friday	14%	14%
Saturday	10%	15%
Sunday	10%	14%

What?

Using data combined from all 396 sites, there is an unprecedented volume of visit activity we can access. In total over 147 million activities have been recorded, putting us in a unique position to see what activities the leisure population are choosing to take part in.

Overall visits

TOTAL NUMBER OF VISITS IN SAMPLE

2016 65,116,346 → 2017 58,678,303 → 2018 (YTD APR) 24,178,718

Why are people visiting leisure facilities?

In total, over 50 different activities were represented in the data set, with these broken down into many more additional sub-categories e.g. swimming and then swimming lessons. Over the last three years, 80% of all visits have been for three core activities– swimming, fitness (gym visits) and group workouts.

147 million visits

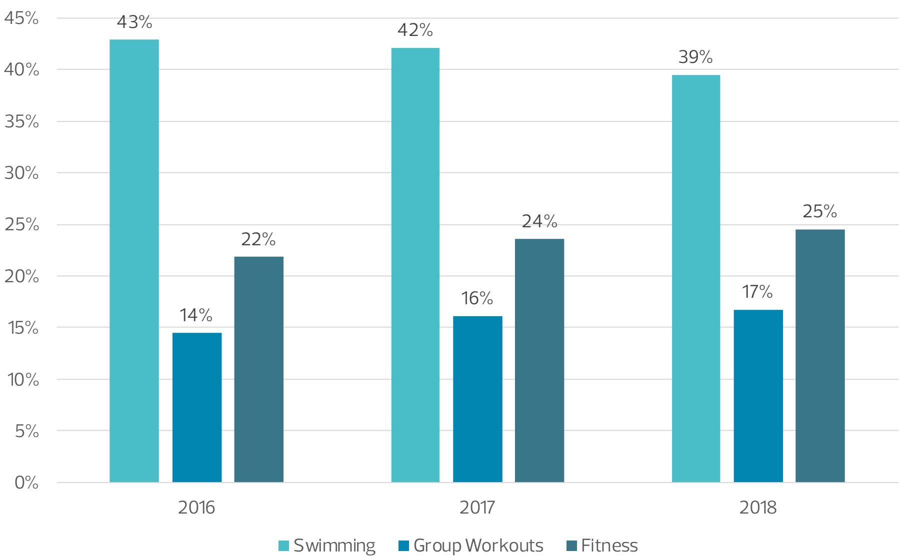
50+ activity types

81% of all visits

Swimming | Group workouts | Fitness

The slight decline in the percentage of visits for swimming continues, with this activity making up 39% of visits in 2018 (YTD), compared to 43% in 2016 and 42% in 2017. This is still by far the most popular activity, followed by fitness which represents 25% of visits in 2018. Both fitness and group workouts are displaying a small level of growth over the last three years.

Graph 13: Percentage of visits for core activities



% overall visits	2016	2017	2018
Swimming	43%	42%	39%
Group workouts	14%	16%	17%
Fitness	22%	24%	25%

Group Workouts

Group workouts represent a segment of visits that has grown slowly over the past few years. In 2018 YTD, 17% of all visits were for a group workout class. Within the dataset over 75 different types of exercise class have been undertaken over the last three years. Last year we saw that a large segment of classes were classified as 'cardio' classes– this year there has been a more thorough breakdown of specific class types within this category which gives us a better idea of the specific class types that are popular.

For the third year in a row, indoor cycling/ spinning is the most popular class type. In 2018 YTD this has made up 12% of all class attendances. The top five classes are unchanged over the last three years, with only one minor change in the ordering of these. Pilates and yoga are the second and third most popular classes amongst a list of otherwise high intensity exercise.

Top 5 group workouts as a percentage of all workouts

	2016			2017			2018 YTD	
1	Indoor Cycling/ Spinning	13%	1	Indoor Cycling/ Spinning	13%	1	Indoor Cycling/ Spinning	12%
2	Pilates	7%	2	Pilates	7%	2	Pilates	8%
3	Body Pump	7%	3	Yoga	7%	3	Yoga	7%
4	Yoga	6%	4	Body Pump	6%	4	Body Pump	6%
5	Aerobics	5%	5	Aerobics	5%	5	Aerobics	5%

Group Workouts– Growth of classes

Within the dataset, a number of classes saw big growth in the number of classes attended from 2016 to 2017. Six classes had growth of 20% or more (only classes with at least 5,000 attendances in 2016 have been included).

Table 11: Classes with more than 20% growth from 2016 to 2017

Class	2016	2017	Increase
Body Works	5,553	19,821	257%
Pump FX	29,814	106,052	256%
Grit Cardio	7,492	10,235	37%
Dance Fitness	9,011	11,821	31%
Tone Classes	102,991	131,677	28%
Legs, Bums and Tums	237,313	285,530	20%

What sports are people doing?

Aside from the core three activities, the remainder of recorded visits to leisure centres are for predominately sports based activities but also include specialist health and wellbeing activities and parent and child activities. The sports covered are both traditional- football and netball- and more novel- climbing and ultimate frisbee. Over the last three years, the percentage of visits for sports activities has not fluctuated a great deal.

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

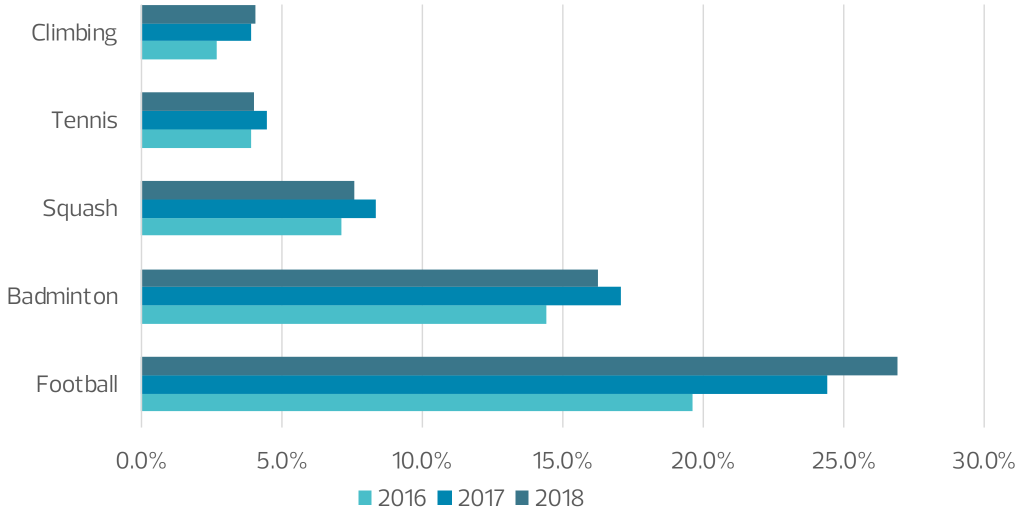
The table below shows visits for the top five sports as a percentage of non-core visits overall. Looking at this sports based segment only, football is the most frequently played sport, with just over one quarter of sport based visits being to play this so far in 2018. This includes all forms of the sport including 5-a-side, outdoor and walking. This was followed by badminton, squash, climbing and tennis. The table below shows visits for the top five sports as a percentage of non-core visits overall.

	2016	2017	2018
	21%	18%	19%

Top 5 Sport Activities as a percentage of all non-core visits

	2016		2017		2018 YTD	
1	Football	20%	Football	24%	Football	27%
2	Badminton	14%	Badminton	17%	Badminton	16%
3	Squash	7%	Squash	8%	Squash	8%
4	Tennis	4%	Tennis	5%	Climbing	4%
5	Climbing	3%	Climbing	4%	Tennis	4%

Graph 14: Percentage of visits for sport activities

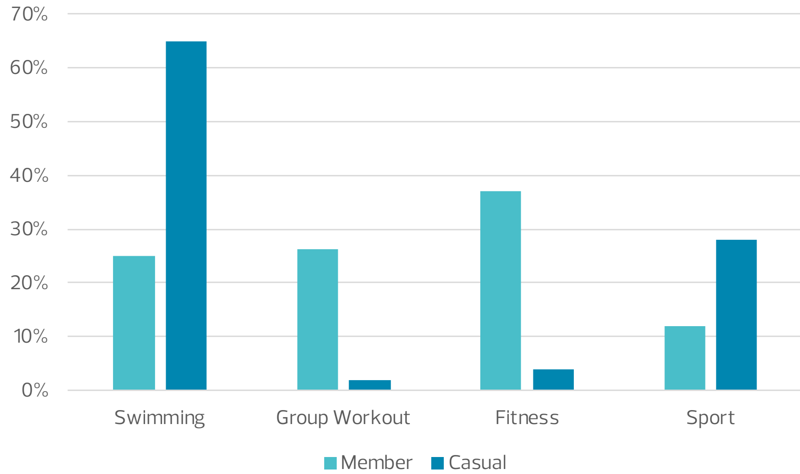


Casual visits and member visits

Looking at total visits across the last three years, 43% of these have come from casual users, and 57% from members. There is a distinct difference in the visit reason breakdown between members and casual visitors. For casual visitors, the main reason for attending is to swim, with this making up nearly two thirds of overall visits (65%). This is a good endorsement for the popularity of swimming with those who just want to turn up and exercise with no membership commitment. Casual visits are rarely for using the gym or group workouts, but a high percentage are for sports activities– 28% compared to 12% for members.

	Casual	Member
	65%	25%
	2%	26%
	4%	37%
	28%	12%

Graph 15: Percentage of visits for sport activities by visit type



Casual visits and member visits for sport

There are also some differences in the sports that casual and members play. For members, nearly one third of sports visits are for badminton (30%), whereas 31% of casual visits are for football, showcasing this as a popular pay and play sport.

Member			Casual		
1	Badminton	30%	1	Football	31%
2	Squash	14%	2	Badminton	8%
3	Football	8%	3	Squash	4%
4	Tennis	7%	4	Climbing	4%
5	50+ activities	3%	5	Bowls	3%

How?

In this final part of the report we have combined some of the metrics explored in the previous sections to investigate how different customer groups interact with leisure facilities, specifically looking at differences in age and gender.

An analysis by gender: Core activities

Looking first of all at the visits by all members, these have been split between visits by males and females. The graph below highlights the different exercise preferences of males and females, with group workouts the most popular visit type for females, making up 38% of visits, and fitness for males, making up nearly half of visits at 46%. There is little difference between the percentage of visits for swimming.

Graph 16: Percentage of visits for core activities split by gender

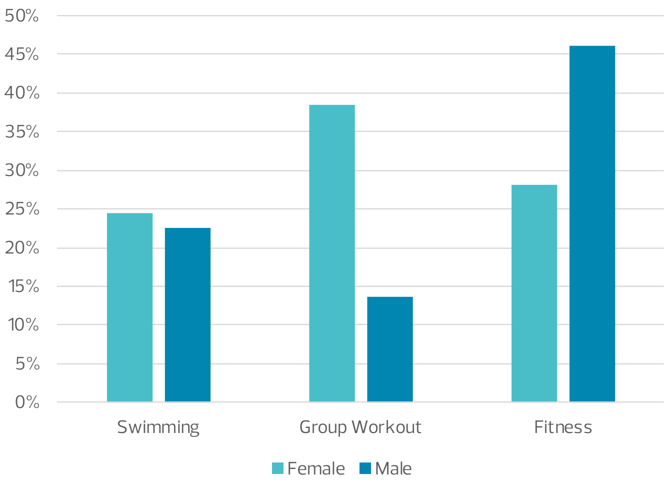
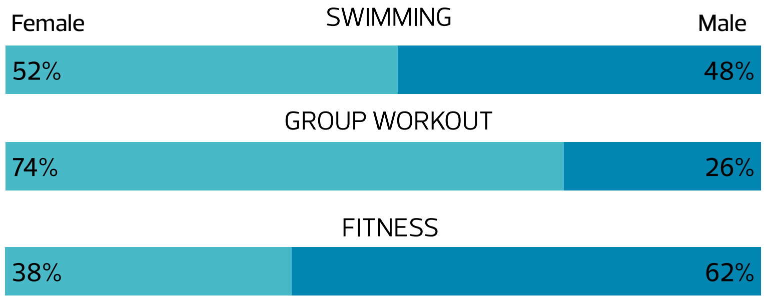


Table 12: Core activities by gender as percentage of visits

Activity	Female	Male
Swimming	24%	23%
Group workout	38%	14%
Fitness	28%	46%

The graph below splits each core activity by the percentage of visits that come from males and females. There is a clear bias towards females attending group workouts, with 74% of visits coming from females. Swimming has the most even split, with 52% of visits from females.

Graph 17: Percentage of core activity visits by gender



An analysis by gender: sports activities

Badminton was the most popular sport for both females and males, making up 27% of sports visits for females and 33% for males. Squash was second most popular for both. Aside from sports activities, visits for children's programmes were far more frequent for females than males.

Table 13: Percentage of sport activities for females

Female	
Badminton	27%
Squash	7%
Tennis	7%
50+ Activities	6%
Football	4%

Table 14: Percentage of sport activities for males

Male	
Badminton	33%
Squash	19%
Football	12%
Tennis	7%
Basketball	4%

An analysis by age

The graph below illustrates the changing exercise preferences of the leisure centre population, and how preferences shift with time. From the youngest age group to the oldest there is a gradual and steady decline in the prevalence of fitness, with this making up over half of visits in the 16–24 age group (57%), but just one quarter in the 75+. This trend is reversed for swimming, which grows from a low of 8% of visits in the 16–24 age group to 39% in the 75+ age group. Group workouts are more steady across the age groups, with the composition of these changing with age.

Graph 18: Percentage of visits for core three activities split by age group

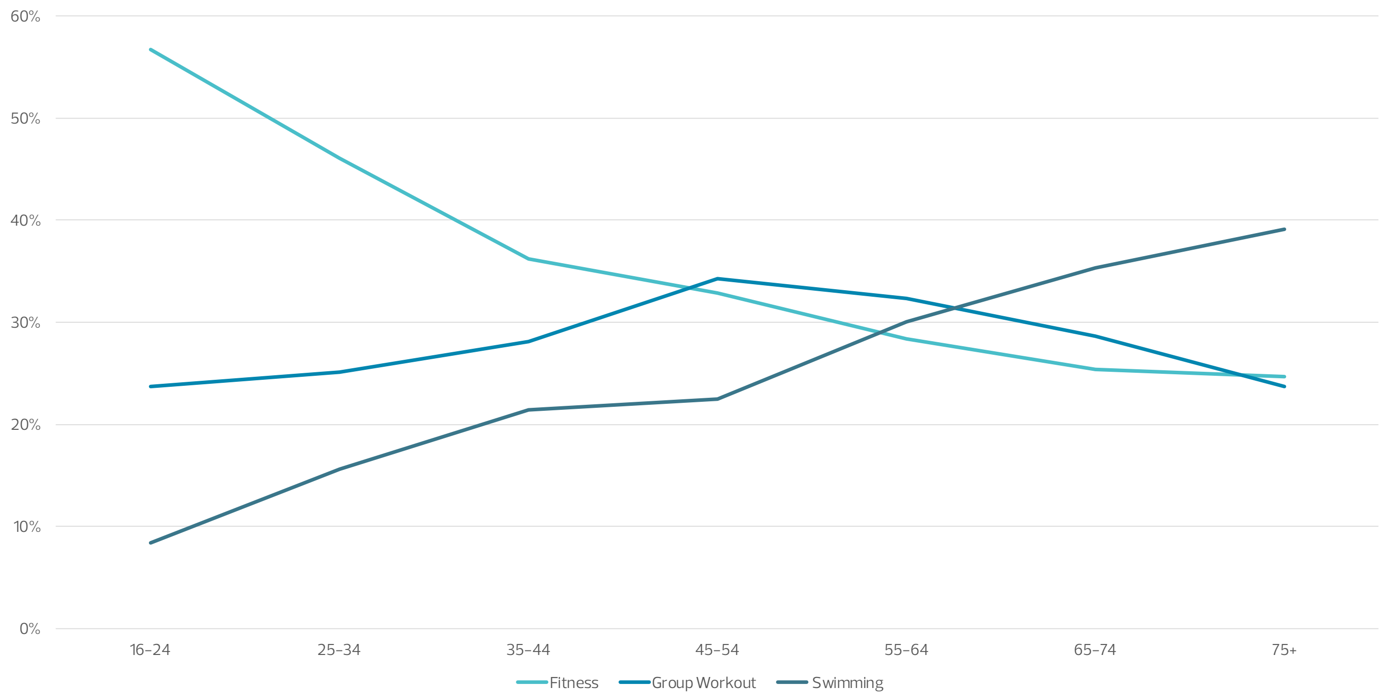


Table 15: Core activity type by age group

	16–24	25–34	35–44	45–54	55–64	65–74	75+
Fitness	57%	46%	36%	33%	28%	25%	25%
Group workout	24%	25%	28%	34%	32%	29%	24%
Swimming	8%	16%	21%	23%	30%	35%	39%

The table below follows a similar theme, looking at the most popular sports activities by age group. Aside from the 75+ age group, badminton is most popular throughout the lifetime of a leisure customer, appearing at the top of the list for all age groups. Squash and tennis are also popular across the ages, with football appearing in the top three for the two youngest age groups. As the age groups move into the 65–74 category, specialist age specific classes become popular, with 50+ activities topping the list for 75+.

Table 16: Top three sports by age group

	16–24	25–34	35–44	45–54	55–64	65–74	75+
1	Badminton	Badminton	Badminton	Badminton	Badminton	Badminton	50+ Activities
2	Football	Squash	Squash	Squash	Squash	50+ Activities	Badminton
3	Squash	Football	Tennis	Tennis	Tennis	50+ Activities	Tennis

Age and gender: Core activities

The patterns demonstrated when segmenting the members according to age and gender were similar to last year. Of the three key sports, swimming has an almost identical popularity profile between males and females of different age groups. For both of these, swimming rises in popularity as age increases. Fitness visits showed the same decline with age, but the prevalence of these was more frequent for males than females of all age groups. Group workouts are the activity with the most different profile for females and males– for females popularity rises with age until 45–54 years where it peaks, before a decline again towards the older age groups. Male group fitness attendance is lower throughout the ages and more constant.

Table 17: Percentage of visits for swimming by age and gender

Swimming	Female	Male
16–24	9%	8%
25–34	16%	15%
35–44	21%	22%
45–54	22%	24%
55–64	31%	29%
65–74	37%	34%
75+	41%	37%

Graph 19: Percentage of visits for swimming by age and gender

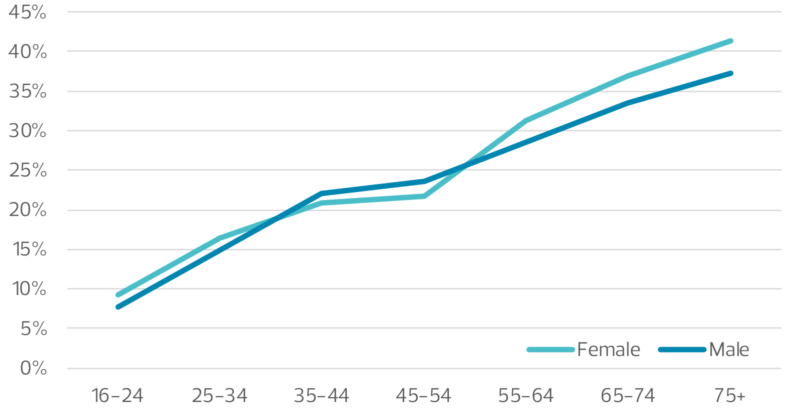


Table 18: Percentage of visits for group workout by age and gender

Group Workout	Female	Male
16–24	35%	15%
25–34	40%	11%
35–44	44%	13%
45–54	48%	18%
55–64	43%	19%
65–74	38%	18%
75+	32%	17%

Graph 20: Percentage of visits for group workout by age and gender

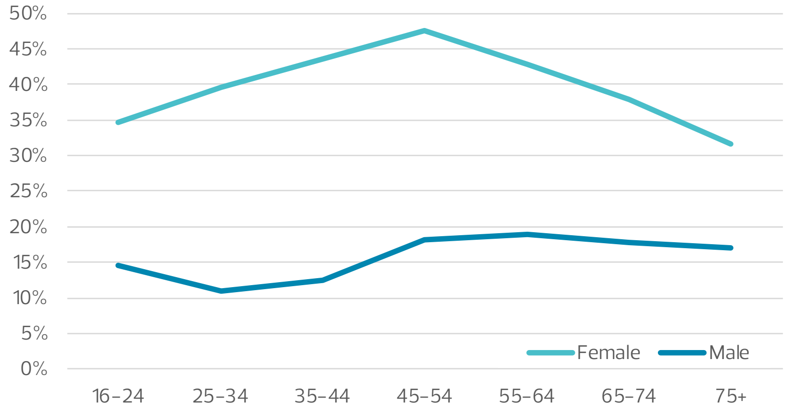
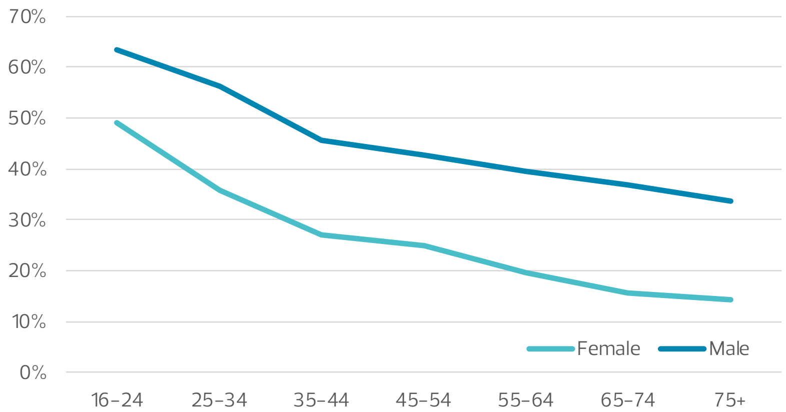


Table 19: Percentage of visits for fitness by age and gender

Fitness	Female	Male
16–24	49%	64%
25–34	36%	56%
35–44	27%	46%
45–54	25%	43%
55–64	19%	40%
65–74	16%	37%
75+	14%	34%

Graph 21: Percentage of visits for fitness by age and gender



Age and gender: Sports (non-core activities)

When looking at the sports segment of the data there are some key differentials across all age groups. Badminton is a popular sport for all, regardless of age or gender. Basketball features in the top 5 sports for younger male age groups, but not for females, where climbing is instead in the top 5.

Activities for older age groups also differ, with golf and bowls appearing in the top 5 for 65-74 and 75+ males. For females, Dance and Tai Chi are on the list.

Table 20: Top three sports by age and gender (male)

	MALE						
	16-24	25-34	35-44	45-54	55-64	65-74	75+
1	Badminton	Badminton	Badminton	Badminton	Badminton	Badminton	50+ activities
2	Football	Squash	Squash	Squash	Squash	Tennis	Badminton
3	Squash	Football	Tennis	Tennis	Tennis	Squash	Tennis
4	Basketball	Tennis	Football	Football	Football	50+ activities	Golf
5	Tennis	Basketball	Basketball	Table Tennis	50+ activities	Golf	Bowls

Table 21: Top three sports by age and gender (female)

	FEMALE						
	16-24	25-34	35-44	45-54	55-64	65-74	75+
1	Badminton	Badminton	Badminton	Badminton	Badminton	50+ activities	50+ activities
2	Squash	Squash	Squash	Squash	50+ activities	Badminton	Tennis
3	Football	Tennis	Tennis	Tennis	Tennis	Tennis	Badminton
4	Tennis	Football	Football	Football	Dance	Dance	Dance
5	Athletics	Climbing	Climbing	50+ activities	Squash	Tai Chi	Tai Chi

Conclusion

This report presents an overview of the current public sector leisure landscape across the UK. Community leisure has a vital role to play in getting, and keeping, the nation active. We are constantly striving to work towards the goal of reducing inactivity and embedding exercise behaviours into the daily lives of our population. Data and insight has a key role to play in this journey, and it is only by making the change from collecting to connecting data that we can harness the true power of the data that is collected every single day at leisure centres up and down the country. By aggregating and analysing this underlying data we can seek to understand how the nation is choosing to exercise, and how these preferences can shift over time.

This year's report has seen many of the trends and insights from last year repeated, with some new areas of interest also emerging. Some of the key themes that emerged from the analysis of the data are explored below.

Older Adults

Like last year, we found that the older adult population were underrepresented in the number of members of leisure centres, and this is a trend that has again continued. This year the 75+ age group made up 2% of the members of our sample, and currently makes up 10% of the UK population. There has been a slightly increase in the average age of members, from 39 years 4 months in FY17 to 39 years 11 months in FY18.This is an area of great potential, especially with the importance of active ageing become more of a priority as the age profile of the nation shifts towards the older years.

There are opportunities around this group when we look at their useage patterns- just 7% of visits for the 75+ came at weekends, compared to 21% for the 25-34 age group. This group were also far more prolific users of centres in the early morning than any other age group, making 47% of their visits between 9am and 12pm. It is this age group that are the most frequent swimmers, with over two thirds of visits for this. In terms of sports activities, whilst perennial favourites badminton and tennis remain popular, it is specialist 50+ activities that are most popular for this segment, showcasing the importance of specific programmes, classes and interventions for specialist populations.

Gender Split

For the second year, the percentage of female members was slightly higher than males, at 52%. The average age of female members was one year older, at 40 years and 4 months compared to 39 years and 4 months. Key differences between these two groups were shown in visit times, with one third of female visits taking place in the late morning (9am- 12pm slot). This contrasts with male visits, which were higher in both afternoon slots. As per last year, we saw females driving forward the group exercise programme, with nearly three quarters of all groups workouts undertaken by this group.

Casual Users

Some interesting trends in useage have emerged from the casual users segment of our data- that is pay as you go visitors who do not hold a membership. The most striking difference in their behaviour is the popularity of swimming amongst this group, with 65% of all their visits being to take part in this. Casual users also have a much higher percentage of overall visits to take part in general sports, with football being by far the most popular activity for these visitors. In contrast, members are strong advocates of badminton across all age and gender breakdowns. Casual users also make more of their visits at weekends than their member counterparts, showcasing the role that leisure has to play in free time and recreation of the nation.

Diversification of sports on offer

Within the data set for sports, the most popular are the 'traditional' sports- football, badminton, squash and tennis. This has remained unchanged for the past three years, but what we are seeing is some newer sports coming through, especially for certain age and gender groups. Climbing makes the top five overall sports, and is particularly popular with casual visitors and the younger female age groups. Basketball makes the top five sports for younger male age groups. In older age groups, dance and Tai Chi make the top five for females, with bowls and golf making the top 5 for males. This broad spectrum of sports demonstrates the versatility of the sector in catering for different customer needs and preferences.

As the data set continues to build and expand year on year, it is our hope that we can continue to provide even more accurate and detailed reporting back to the sector with the ultimate aim of getting more people, more active, more often. If there is something that you think should be in this report, please do let us know by emailing research@ukactive.org.uk.

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