



Wandsworth

Leisure Centre & Physical

Activity Survey

2023



LEISURE-NET
SOLUTIONS LTD

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01 Project Background

This research was designed to investigate attitudes and behavior around physical activity and exercise in general, and more specifically to find out about opinions around, and awareness of, Wandsworth Borough Council's leisure centres.

Leisure-net

Leisure-net Solutions, the industry leader for Customer Insight and Market Intelligence in the active leisure industry, is delighted to present this report of research, carried out on behalf of Wandsworth Borough Council.

Research Methods

The data within this report was gathered using an online survey created and promoted by the client. The survey was completed in November 2022 and is a self-selection online survey with a sample size of 268 and 64% being active users of the local leisure centres. It should be noted that it is skewed heavily towards females, somewhat towards older age groups, and significantly towards "active people" currently using local leisure centres and therefore may not be representative of the community as a whole.

In our experience, these sorts of surveys are also more likely to be completed by residents with a stronger view on local provision/service, who are also more active and/or have an interest in local provision, such as sports centres, sports clubs etc. The results should therefore be analysed in this context.

Where benchmarks are quoted these are derived from similar surveys that we have carried out with other local authority clients.

The survey was advertised by the client to leisure centre users and local residents through a variety of means:

- Sent to all the schools in the Borough
- Sent out in voluntary sector comms
- Promoted by the Council's community engagement team
- Press release
- Social media channels with targeted advertising to access underrepresented groups at the halfway point
- Poster in Libraries
- Posters in Leisure Centres
- Advertised on the centre's app
- Internal comms at the Council

02 Key Findings

Leisure Centres

- Most of the sample (96%) live in the local area
- 64% of respondents said they currently use a leisure facility operated by the Council
- 79% of non Council leisure centre users (97 people from the sample), said they exercise but not at a leisure facility operated by the Council. Whereas 21% (20 people from the sub sample) said they don't exercise at all (less than 30 minutes per week)
- 55 Council leisure centre users said they use 'Putney Leisure Centre' as their main centre
- 80% said they use their main centre because it is the nearest to their home
- 41% of users of centres said their main method of travel to their centre was 'On foot'
- Based on their last visit to the centre, 64% of users were 'Very or Somewhat Satisfied' with their overall experience
- 52% of users stated they only ever use the leisure centre 'As an individual', with just 6% stating they only use it 'With friends'
- 41% 'Sometimes' use the leisure centre 'With their family/children'
- 60% said the main reason they visited the leisure centre was 'To exercise' followed by 31% who visited for 'Family activities (e.g. swimming lessons)'
- Use of the Indoor Pool was the facility that was rated as most important by 82% of users
- 72% said the thing they liked the most about the centre they were using was the 'Location' followed by 52% who said they liked the 'Facilities (e.g., pools, gym, courts, halls, pitches, soft play)'

Key Findings

Exercise

- 'Outside/open spaces' was the most popular place chosen by non-users when asked where they currently exercise
- When non-users were asked what exercise/activity they currently do, 68% stated 'Walking'
- 'Quality of facilities' was selected as the main reason that non-users do not use a public leisure centre
- Over half of the non-users (60%) currently travel 'On foot' to where they exercise. 89% said the answer selected was their preferred method of travel

Barriers and Encouragement Factors for the Inactive

- Of the 20 respondents who stated 'I don't exercise (i.e. did less than 30 minutes per week)', 95% said they were 'Interested' in getting more active
- 'Costs involved' was the biggest factor preventing them from exercising
- 'Accessible/good quality facilities' and 'Availability of time', were the most important factors when thinking about doing more physical activity or exercise
- 'Cleanliness of facilities', 'Better range of facilities/equipment' and 'Improved facilities' were the main factors that would encourage people to participate in more physical activity or exercise
- 40% said they would be "Very likely" to join a leisure centre if they were to start exercising and 30% "Quite likely"
- 75% (15 of those that don't exercise), chose 'Costs' as one of the reasons that they would be likely to join a leisure centre
- If 'Community activities' were on the same site as the leisure centre, 45% of the total sample said 'Yes' to it being an encouraging factor for them to use it more. This was closely followed by 'Health services' at 38%

Key Findings

Key question responses by target groups

The primary reasons preventing the below target groups identified in the table below from currently exercising varied. For the inactive and those with a long term disability it was the 'Costs involved' but for the 65+ it is was the 'Lack of confidence' and 'not being sure on where to start'.

'Accessible/good quality facilities' and 'availability of time' were the most common factors that were most important to all 3 target groups when thinking about doing more physical activity.

'Cleanliness of facilities' was the primary factor to encourage all three target groups to start doing more physical activity.

Main reasons not currently exercising			
Rank of importance	Inactive	65+	Long term disability
1st	Costs involved	=Lack of confidence Not sure where to start	Disability/Mobility issues
2nd	Lack of confidence	=Disability/Mobility issues Health condition Costs involved Used to exercise just not currently	Lack of confidence
3rd	Disability/Mobility issues	=Lack of information No motivation	Health condition

= is where the responses share a ranking

Key Findings

Key question responses by target groups

How important are the following when you think about doing more Physical Activity?

Rank of importance	Inactive	65+	Long term disability
1 st	=Accessible/good quality facilities Availability of time	=Accessible/good quality facilities Availability of time Convenience of facility location Direct costs e.g. fee & charges Appropriate classes/activities Availability of time Indirect costs e.g. clothing	=Accessible/good quality facilities Direct costs e.g. fees & charges Availability of time
2 nd	Convenience of facility location	=Personal/motivation/goals Support from peer group	=Convenience of facility location Any disability/physical impairments
3 rd	Direct costs e.g. fees & charges	Someone to go with/confidence	=Personal motivation/goals Someone to go with/confidence Support from peer group Availability of transport

To what extent would the following things encourage you to start doing more Physical Activity?

Rank of importance	Inactive	65+	Long term disability
1 st	=Cleanliness of facilities Better range of facilities/equipment	=More information Cleanliness of facilities Better transport	=Cleanliness of facilities Better range of facilities/equipment Lower costs (prices) Specific sessions
2 nd	Lower costs (prices)	=Better range of facilities/equipment Better quality coaching	Increased opening times
3 rd	Increased range of sessions and classes	=Lower costs/prices Increased range of sessions and classes Increased opening times Improved facilities Having someone to go with Classes available different times of the day Better facility location	=Improved facilities Increased range of sessions and classes

03 Considerations and Recommendations

It is important to remember that this survey primarily reflects the views of current users of the Council's leisure facilities and only 20 of the survey's respondents classified themselves as being inactive.

The view and usage patterns of the current user

Ease of use is a key factor in determining which leisure centre someone uses, shown by the fact that 80% of the sample said the reason they use a particular centre is because it is the nearest to their home, and 72% saying that the thing they most like about their centre was its 'Location'. This is one of the explanations for 41% of users saying that their main method of travel to their centre is by foot. With lack of time being such a critical barrier to people being active, making physical activity easy for people to build into their everyday lives is crucial, and having local leisure centres nearby that can be accessed on foot is a key part of this.

Most people use the centre by themselves rather than with friends, although 41% said they sometimes use it with their family/children, so there is quite a high percentage of customers that mainly use it by themselves but will then occasionally come with their family. This highlights a potential cross marketing opportunity to encourage more family use.

Satisfaction levels reasonable

When asked how satisfied they were with their overall experience, based on their last visit, 64% were Very or Quite Satisfied, slightly lower than what we would typically expect, with our national benchmark being between 70-75%.

Considerations and Recommendations

Non-users prefer to walk outside and in open spaces

Most of the non-users of the leisure centres were exercising but were choosing to exercise outdoors and independently, mainly by walking. The main reason they chose not to use the leisure centres was the 'Quality of facilities' provided, but they also indicated a strong preference to walk to where they exercise, again emphasising the importance of local facilities.

The inactive want to start exercising but costs is perceived to be a key barrier

Of the relatively small sample of inactive people, the vast majority expressed an interest in becoming more active but quoted 'Costs' as being their key barrier. If they did become more active the majority (70%), would be 'Very or quite likely' to do so by using a leisure centre, showing the potential appeal of these centres to people not currently participating.

Good quality and accessible facilities and sessions crucial to change

The research shows that the provision of accessible and good quality facilities, that can be used without using up too much time, is crucial to move people from interest into action. Also important is the programming and timetabling of sessions and classes at appropriate times, making it as easy as possible for people to attend when it is convenient to them. Finally, the social element in keeping people motivated to start and continue exercise habits cannot be underestimated.

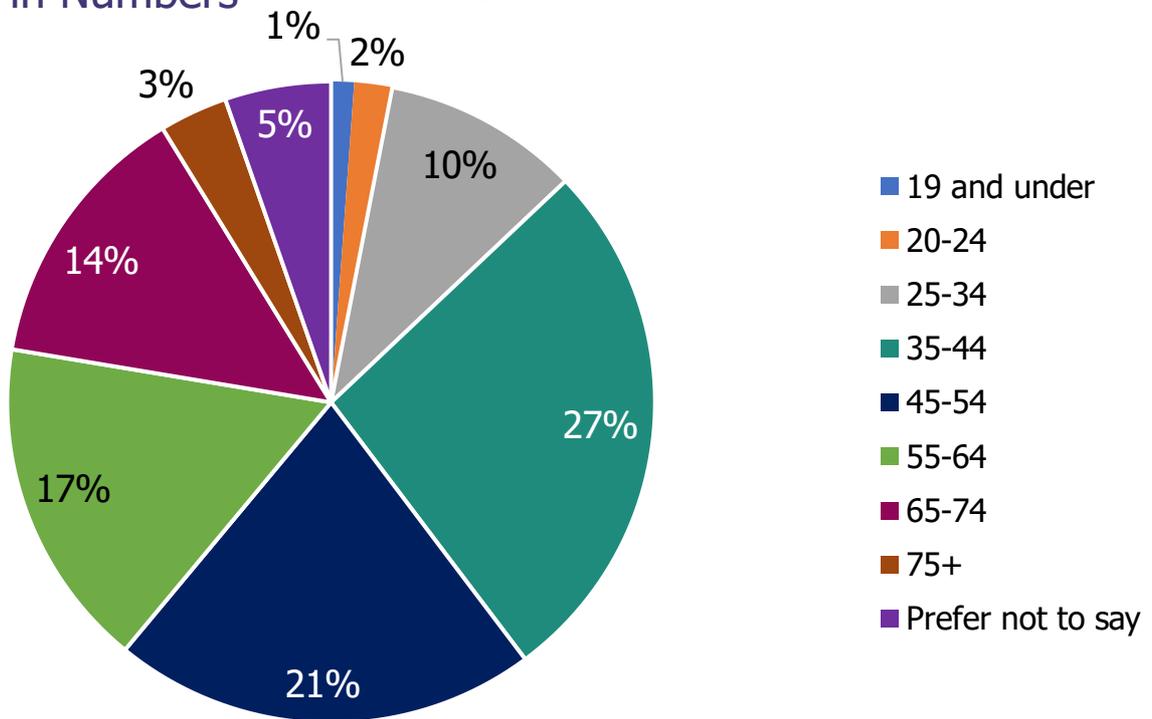
Co-location of services an opportunity

With 45% of the total sample saying that the co-location of 'community services' on the same site as their leisure centre would encourage them to use it more, and 38% saying 'health services' would encourage them, this is something well worth considering as a way of reaching new markets and stimulating existing ones.

04 Survey Results

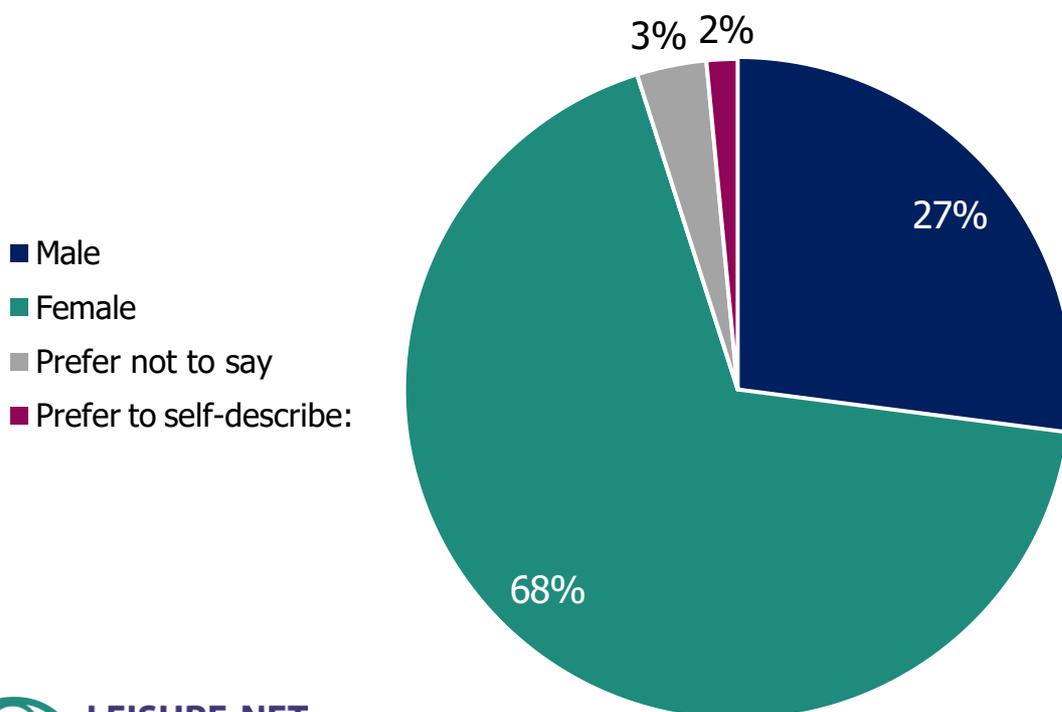
The Survey in Numbers

Age

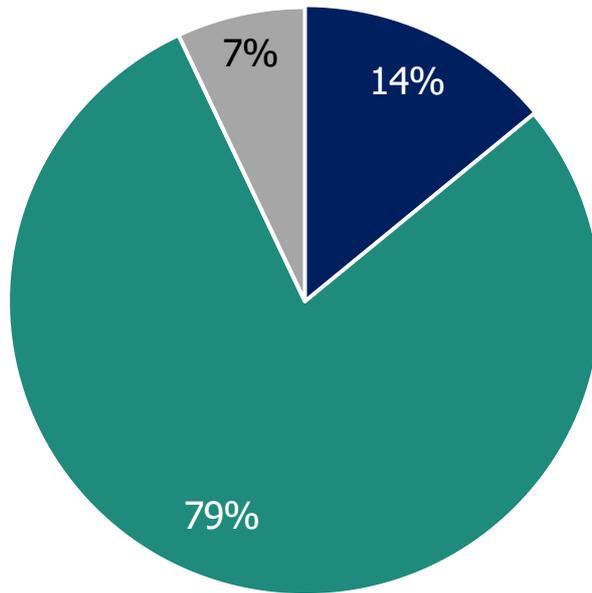


SAMPLE
268

Gender

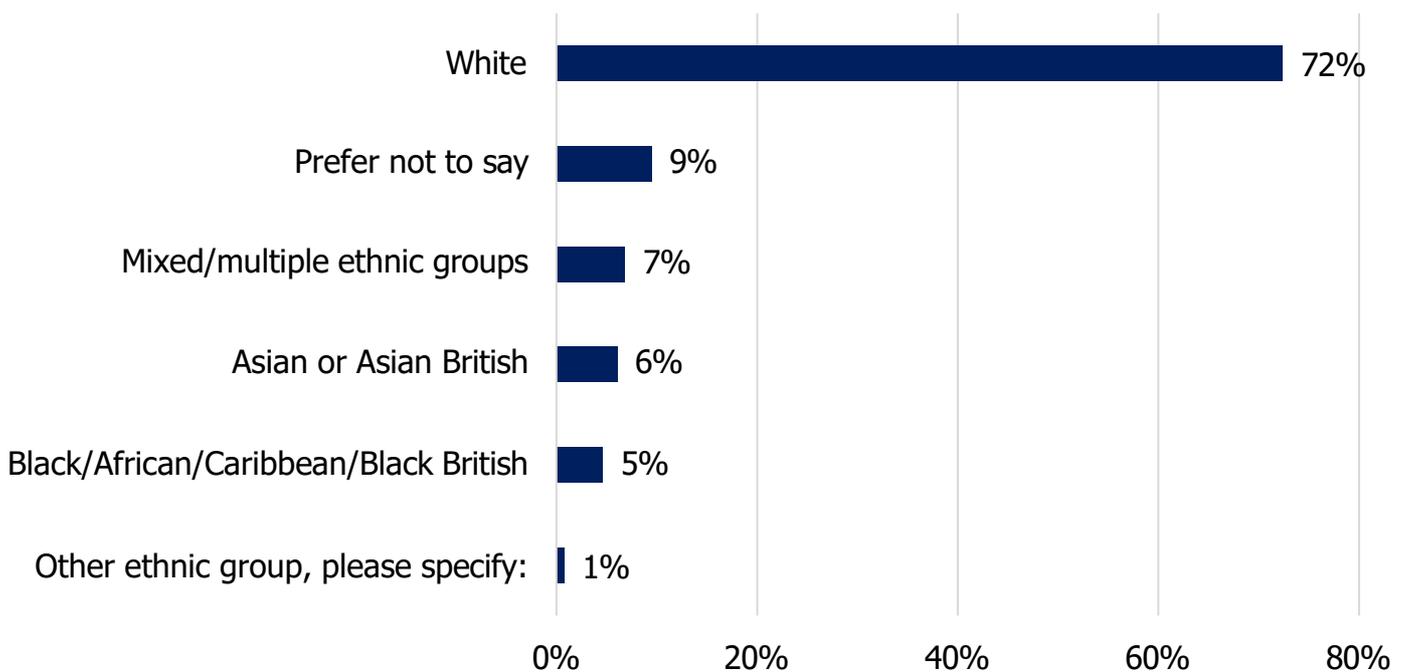


Do you consider yourself to have a disability?

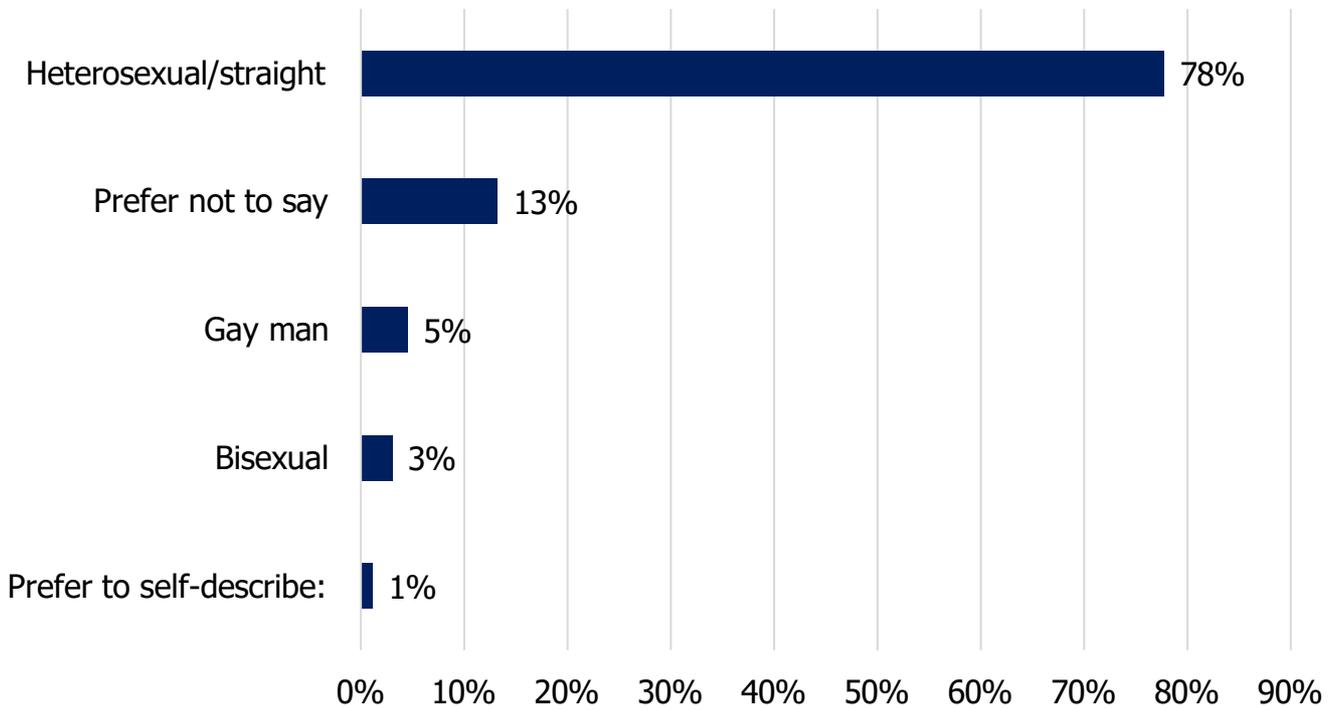


■ Yes ■ No ■ Prefer not to say

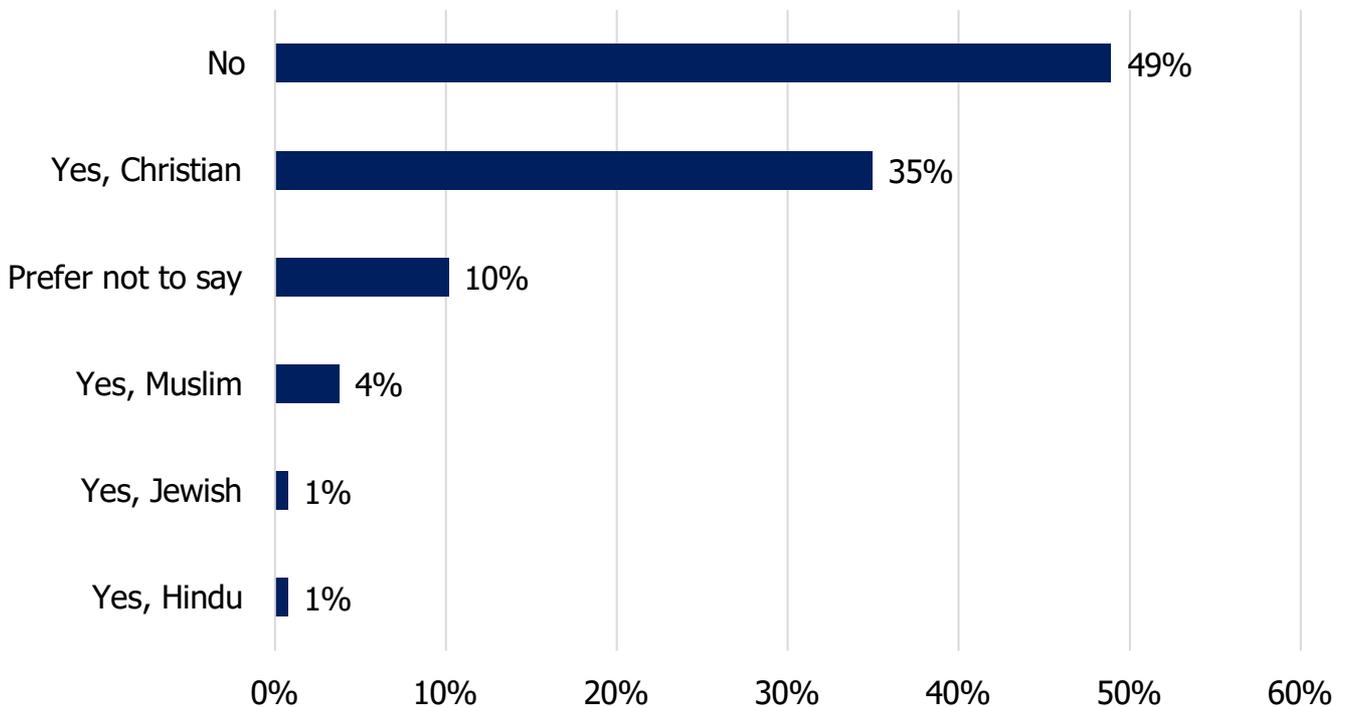
Ethnic Group



Sexual Orientation

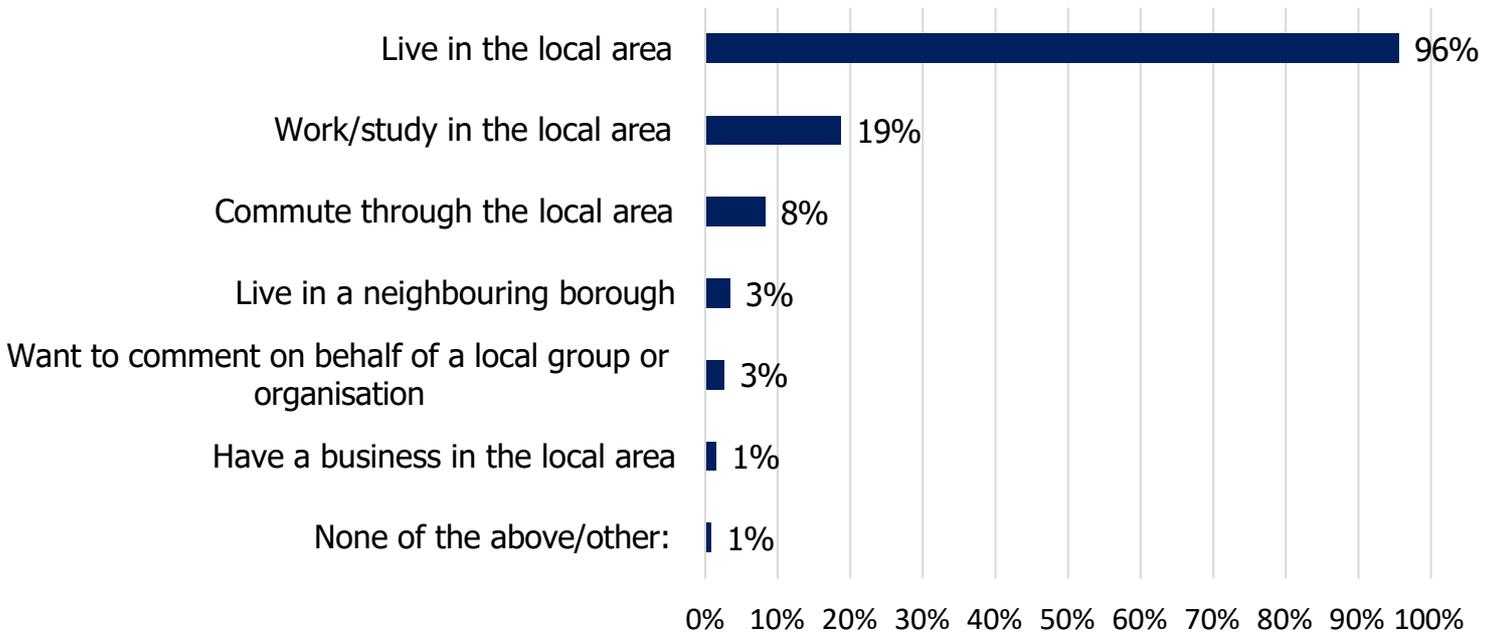


Religion or Faith Group



05 Question Breakdown

Do you:



Do you: Other

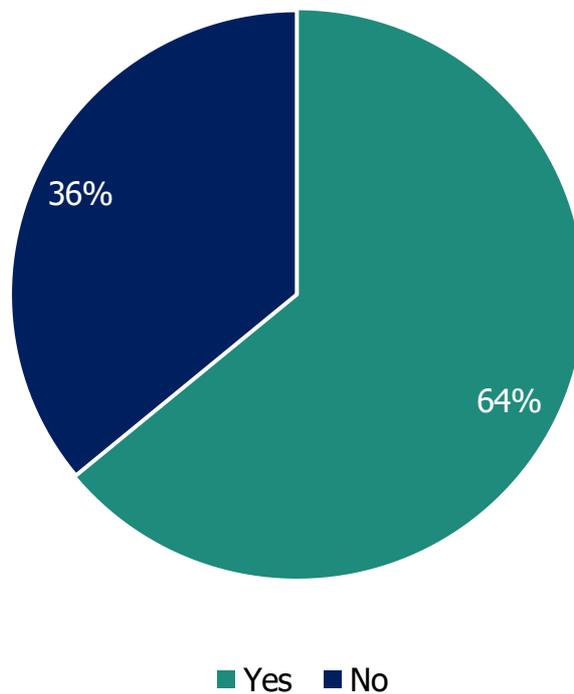
Work in the fitness industry in the local area

Training group at Battersea

Exercise at Wandsworth swimming pools

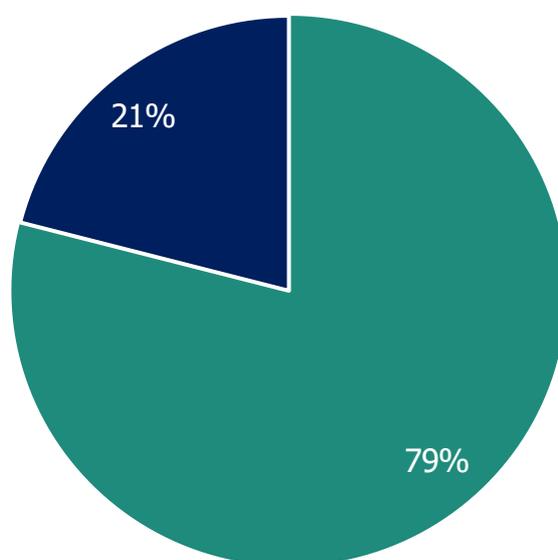
96% of the sample live in the local area

Do you currently use a leisure facility operated by the Council?



64% of respondents said they currently use a leisure facility operated by the Council

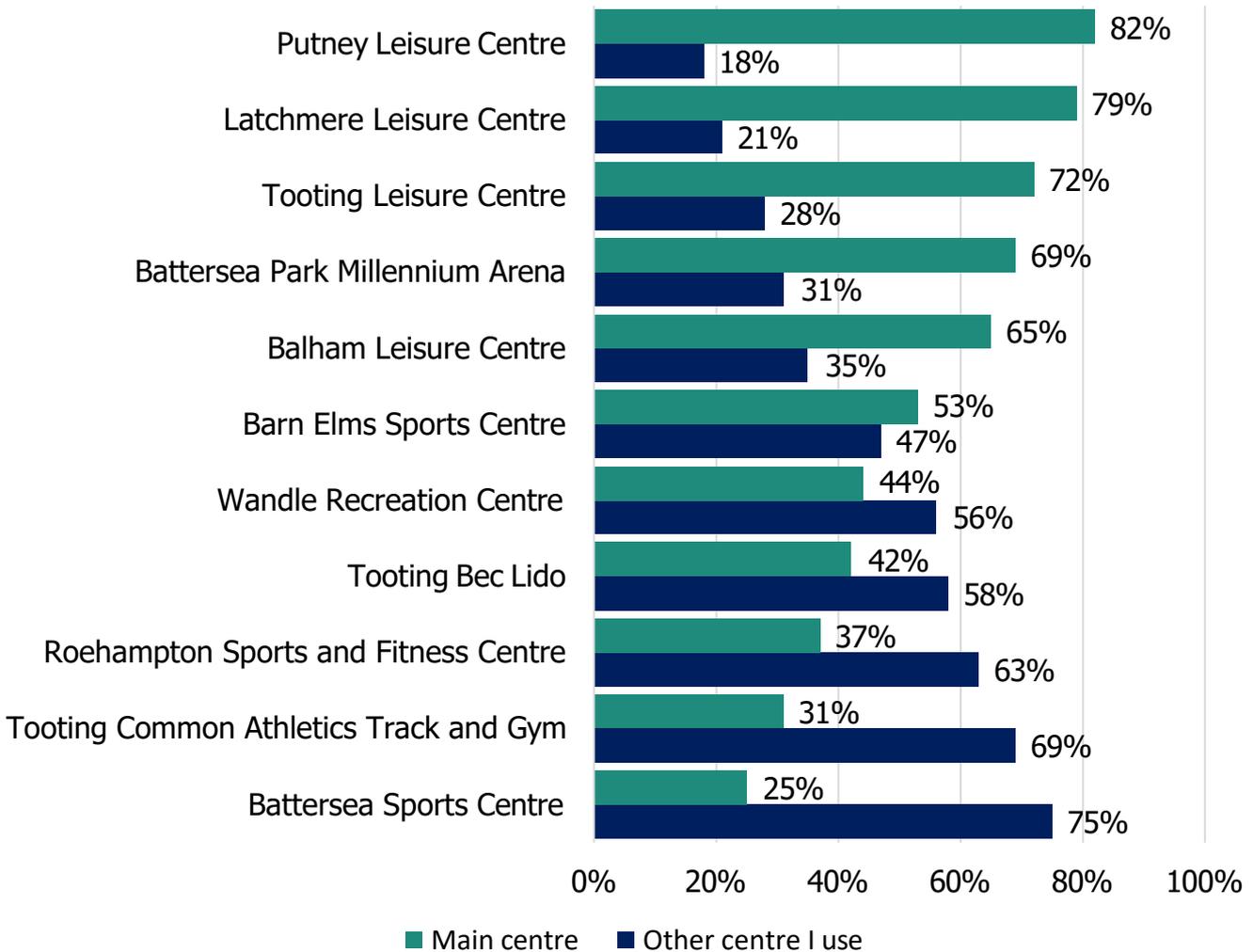
Please select the statement that most applies to you (Non-users of Council leisure facilities)



- I exercise but not at a leisure facility operated by the council
- I don't exercise (less than 30 minutes per week)

79% of non Council leisure centre users (97 people from the sample) said they exercise but not at a leisure facility operated by the Council. Whereas **21%** (20 people from the sub sample) said they don't exercise (less than 30 minutes per week)

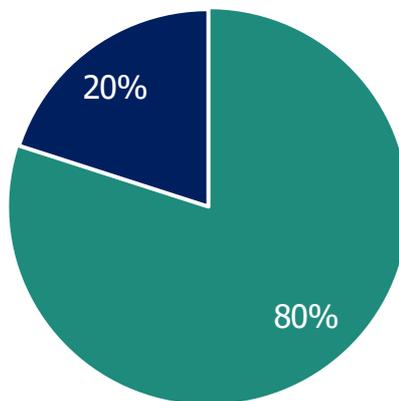
Which centre(s) do you use?



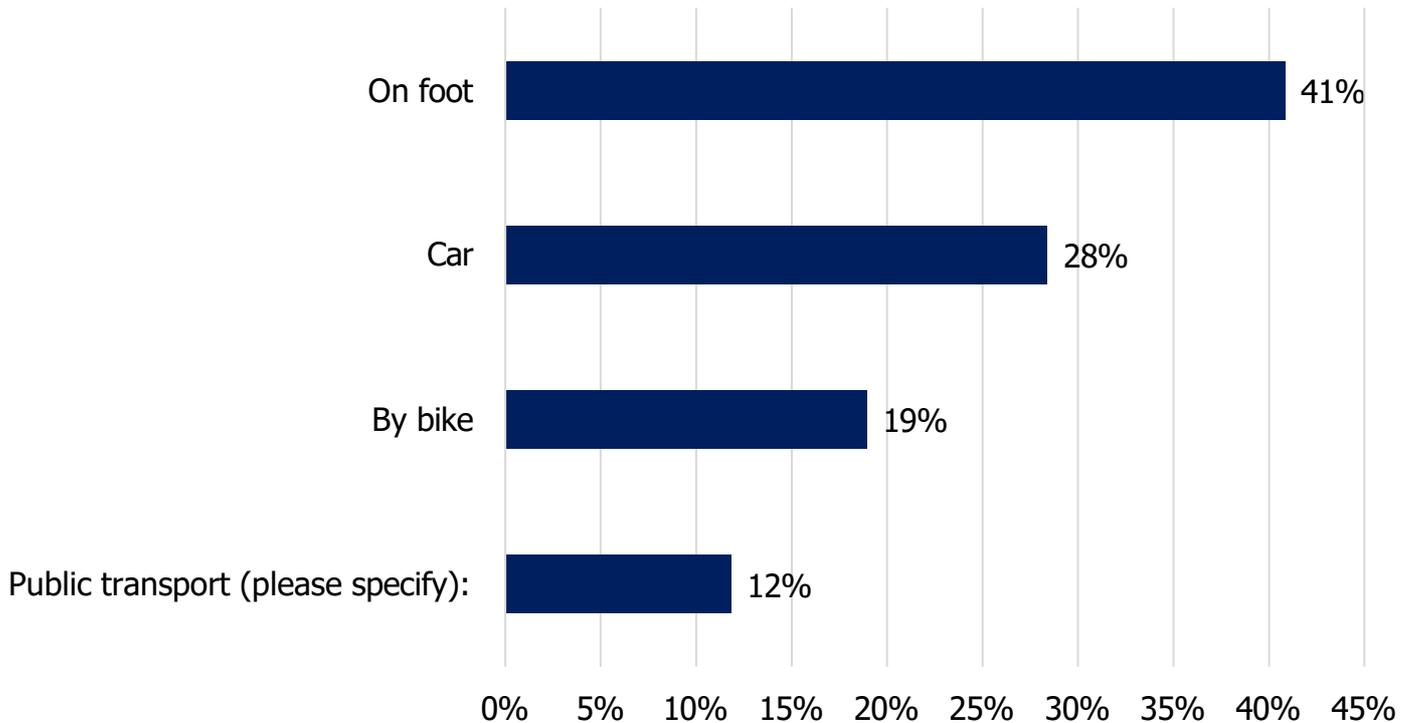
55 Council leisure centre users said they use 'Putney Leisure Centre' as their main centre

Is this centre the nearest centre to your home?

80% said they use their main centre because it is the nearest to their home



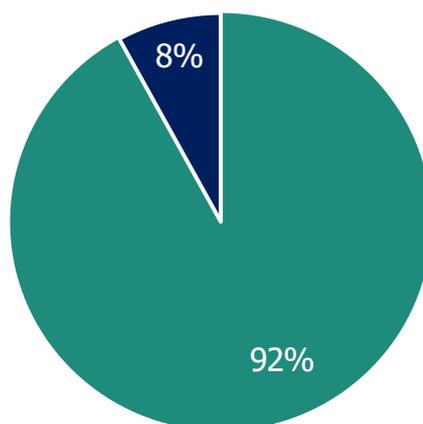
How do you currently travel to the centre(s)?



41% of users of centres said their **main method of travel** to their centre was 'On foot'

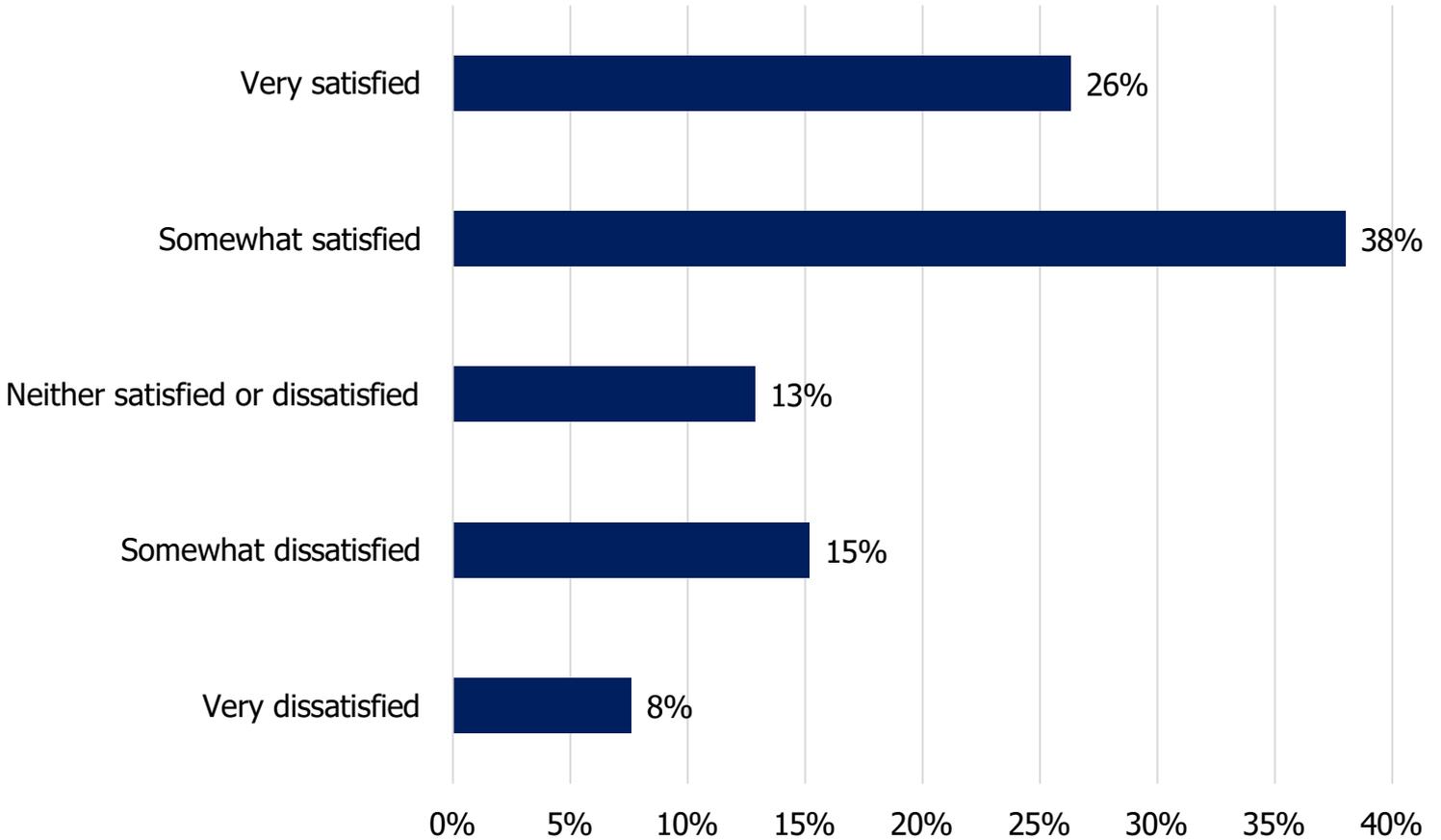
Is this your preferred method of travel?

From the answers selected above, **92%** of users said this was their preferred method of travel



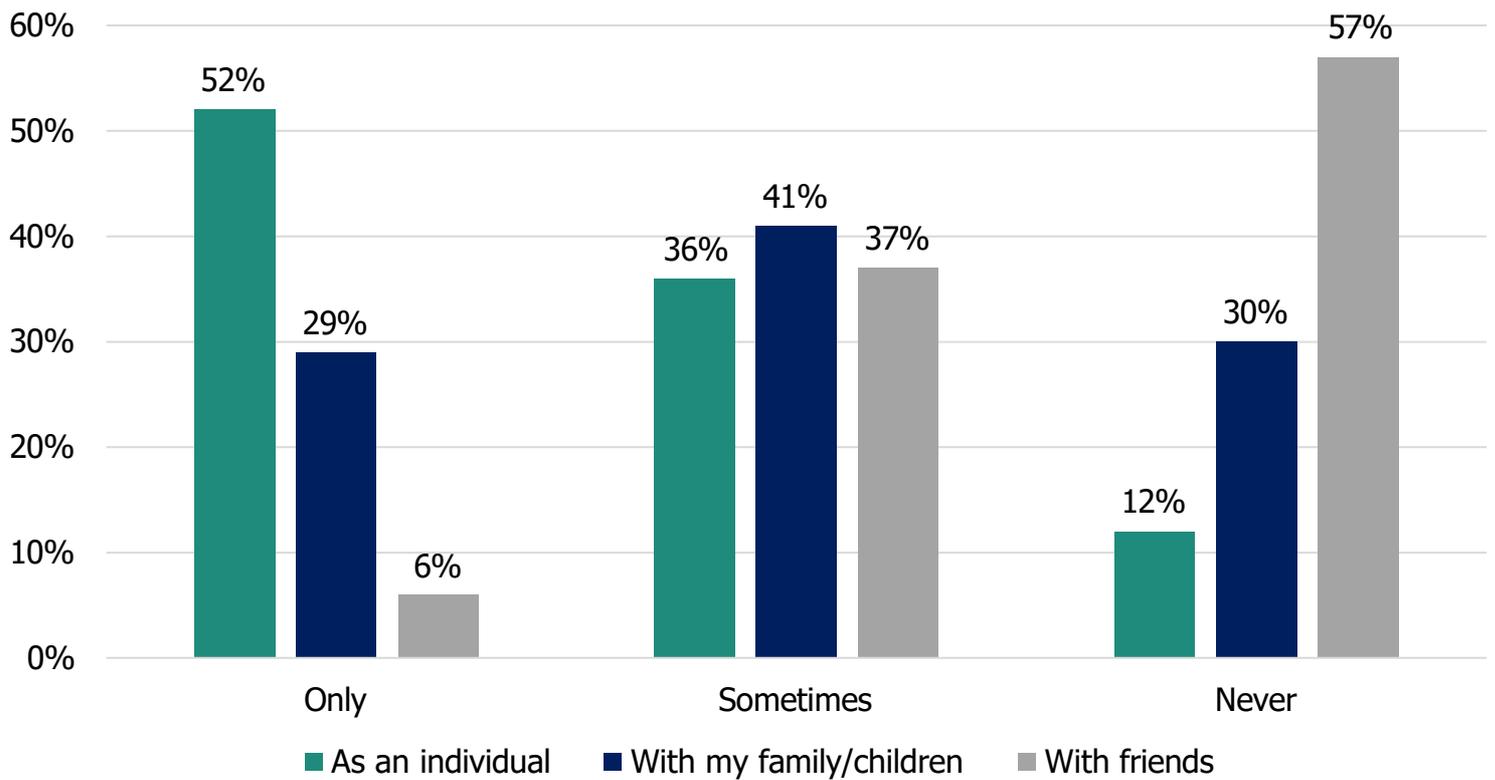
■ Yes ■ No

Based on your last visit to the centre, how satisfied or dissatisfied were you with the overall experience



Based on their last visit to the centre, **64%** of users were 'Very or Somewhat Satisfied' with their overall experience

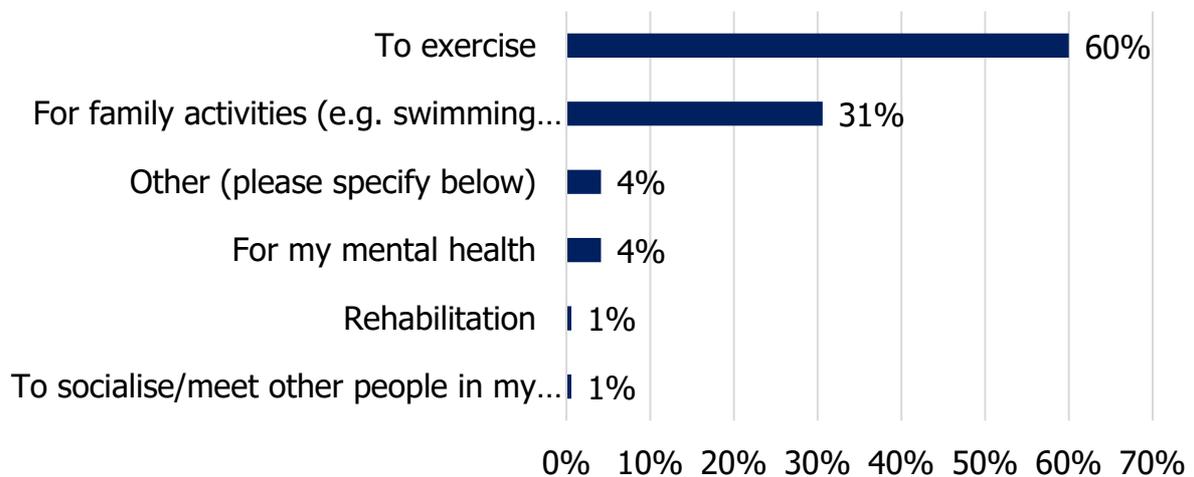
Do you usually use the leisure centre as an individual or do you attend with others?



52% of users stated they **only** ever use the leisure centre 'As an individual' with just **6%** stating they **only** use it 'With friends'

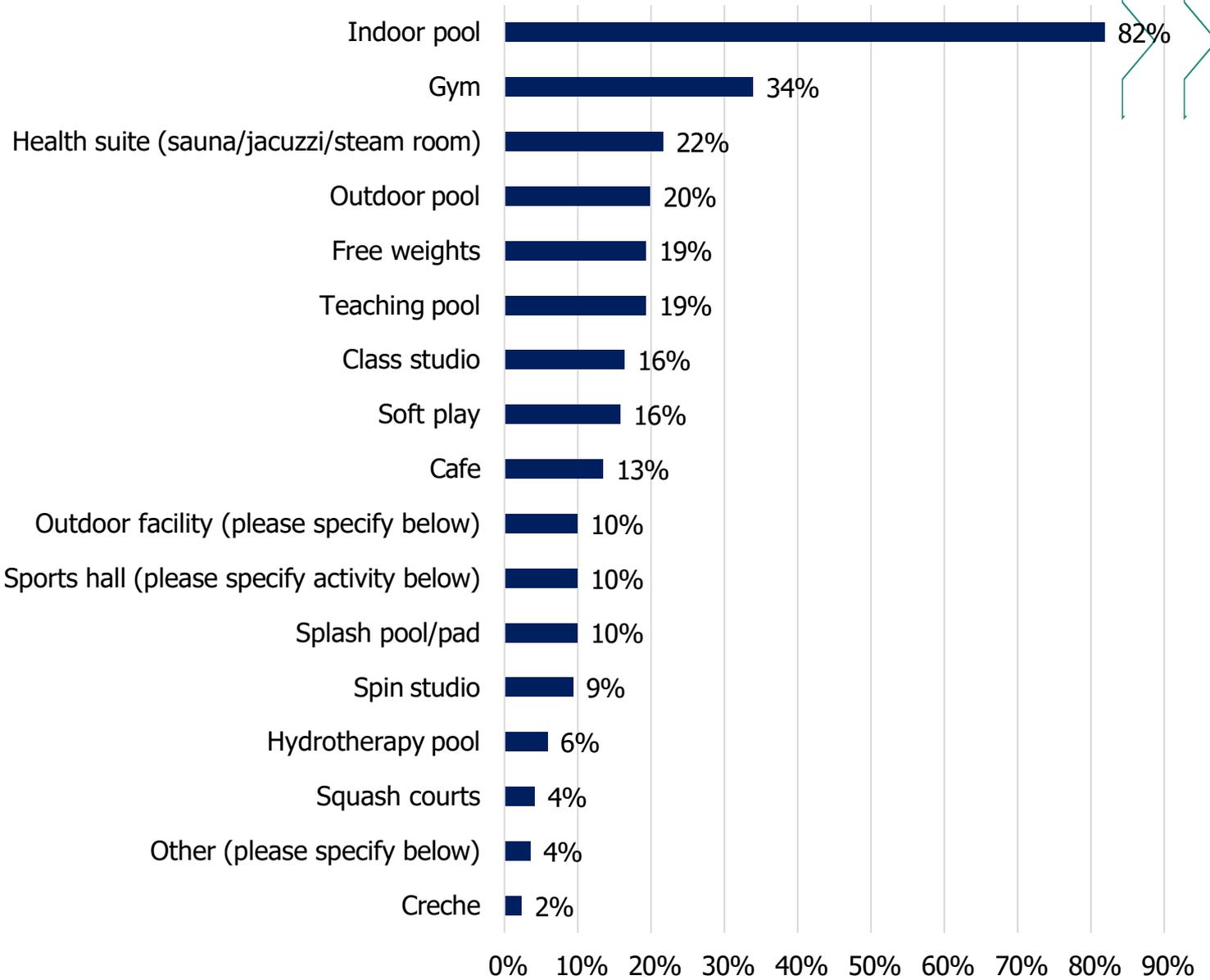
41% 'Sometimes' use the leisure centre 'With their family/children'

What is the main reason you visit the leisure centre?



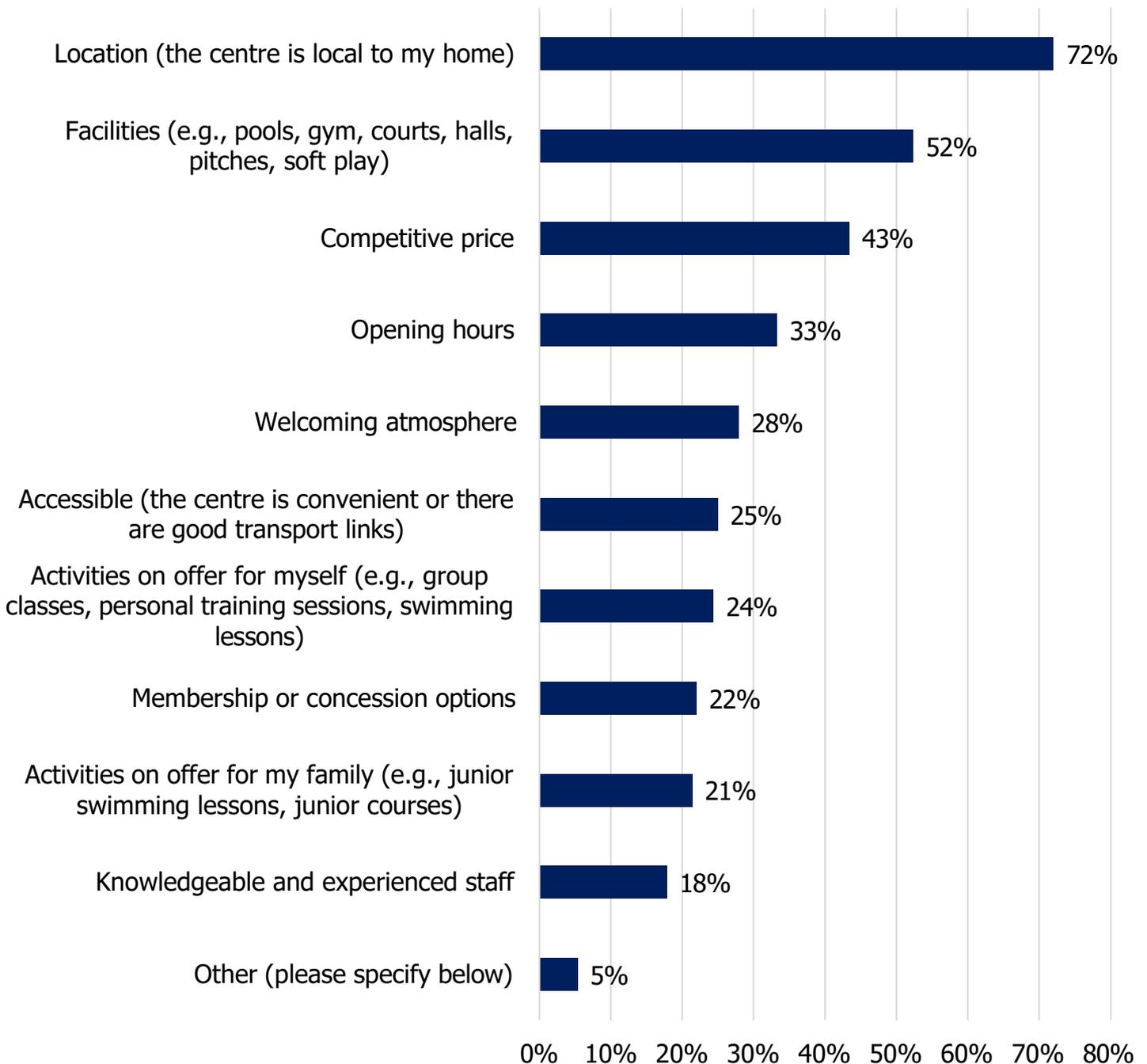
60% of users said the **main reason** they visited the leisure centre was 'To exercise'

Which facilities are most important to you?



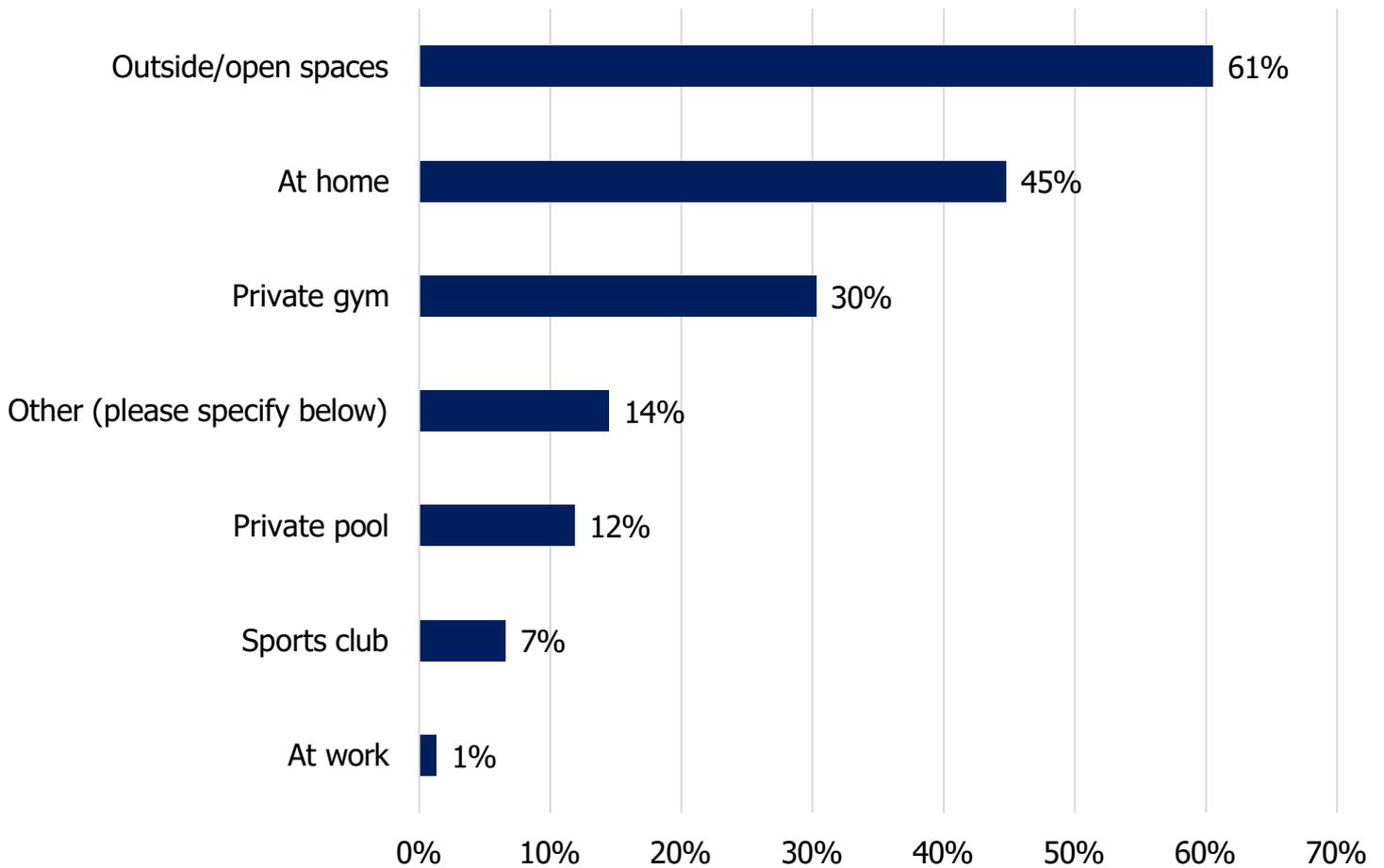
Use of the **Indoor Pool** was the facility that was rated as **Most important** by **82%** of users

What do you like about the centre(s) you are using?



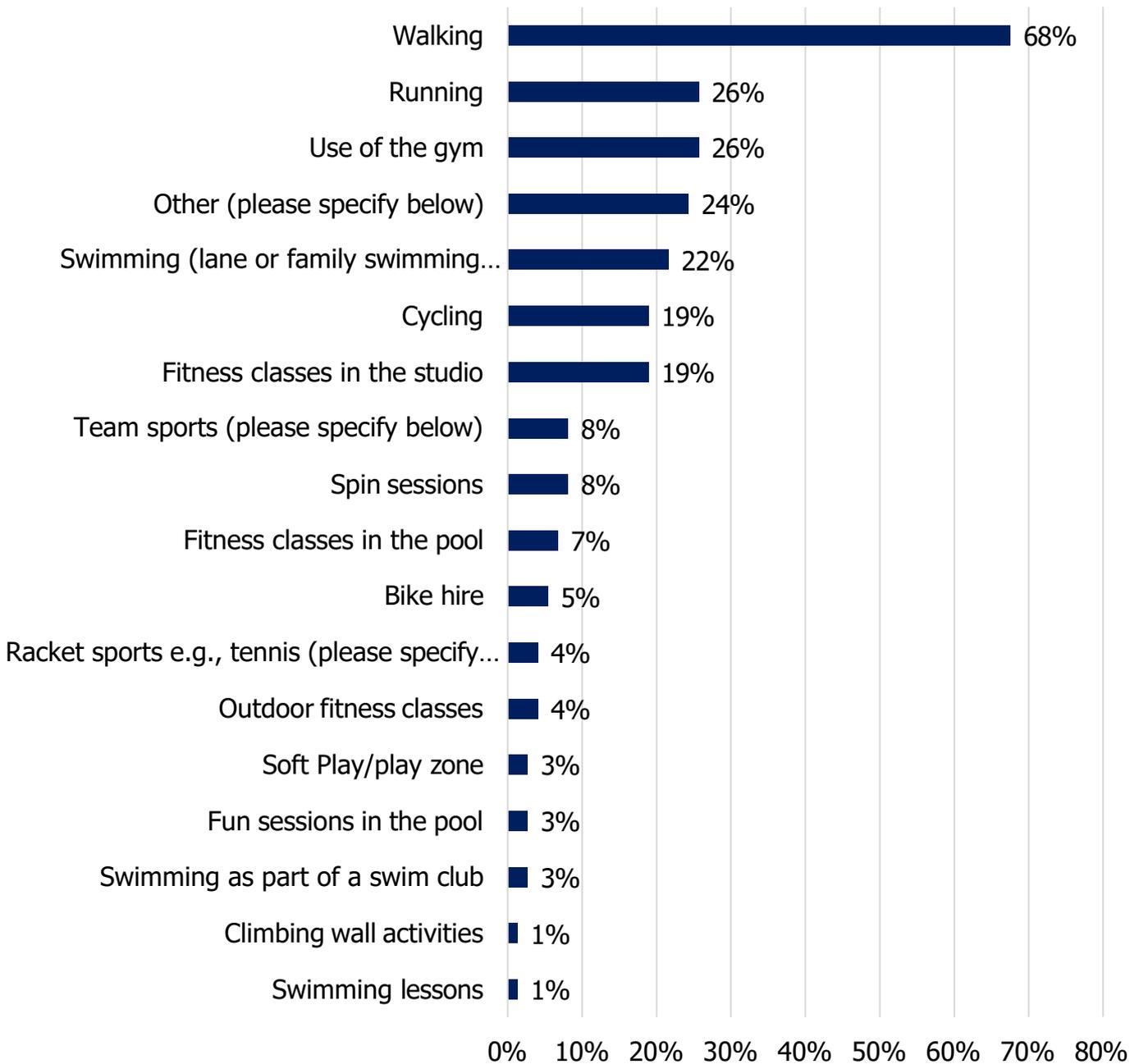
72% said the thing they liked the most about the centre they were using was the 'Location'

Where do you currently exercise? (Non-users of Council leisure centres)



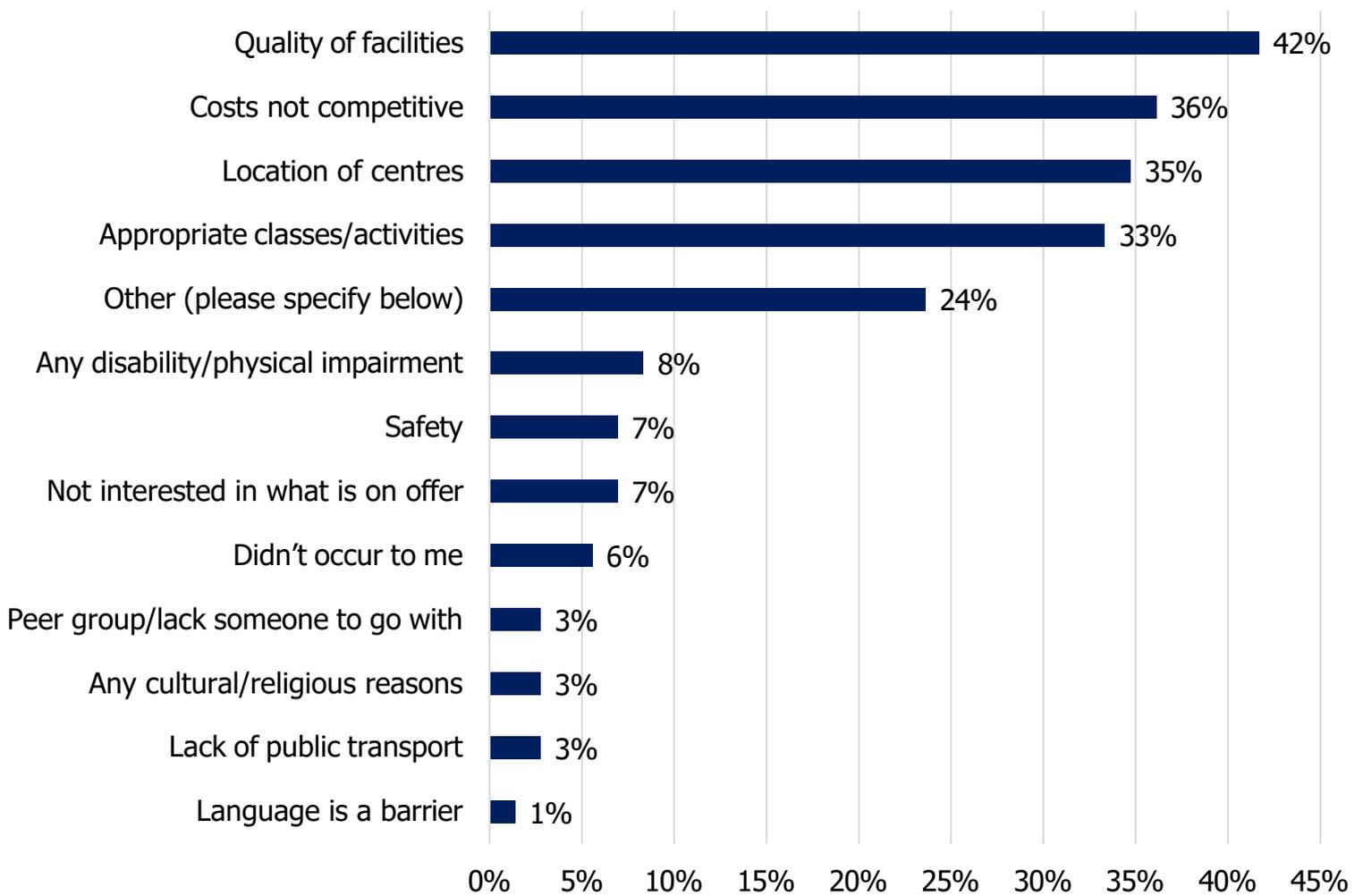
'Outside/open spaces' was the most popular place chosen by non-users when asked where they currently exercise

Which of the below do you currently do?



When **non-users** of were asked what **exercise/activity** they currently do, **68%** stated 'Walking'

What are the reasons you do not use a public leisure centre?

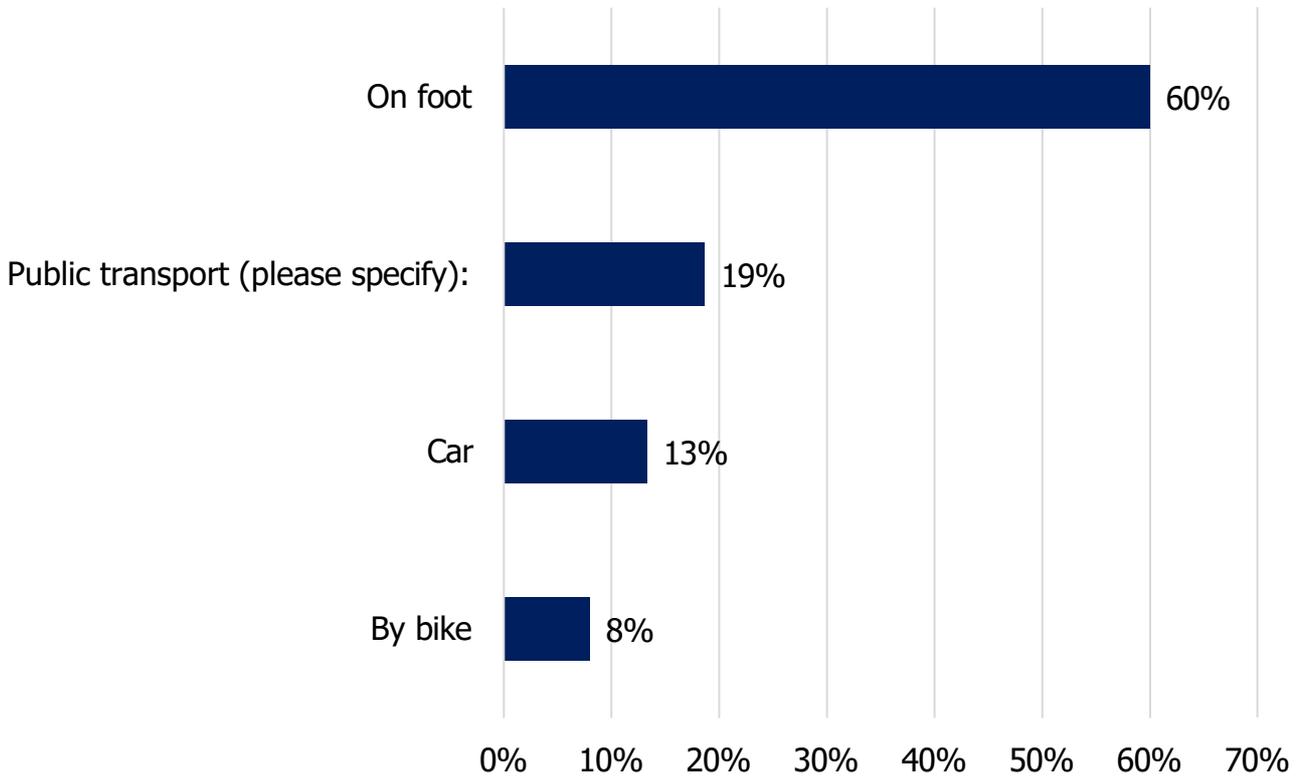


'Quality of facilities' was commonly selected as the main reason that non-users do not use a public leisure centre

Other (please specify) Top 3 trends:

- Cost
- Lack of classes
- Workout outside

How do you currently travel to where you exercise?



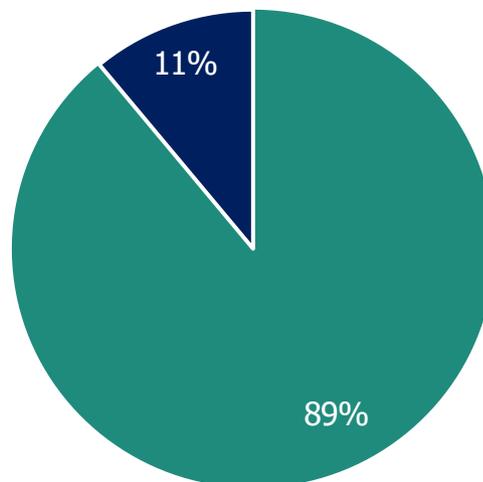
Over half of the non-users (**60%**) currently travel 'On foot' to where they exercise

Public transport. Top 3 trends:

- Bus
- Tube
- Train

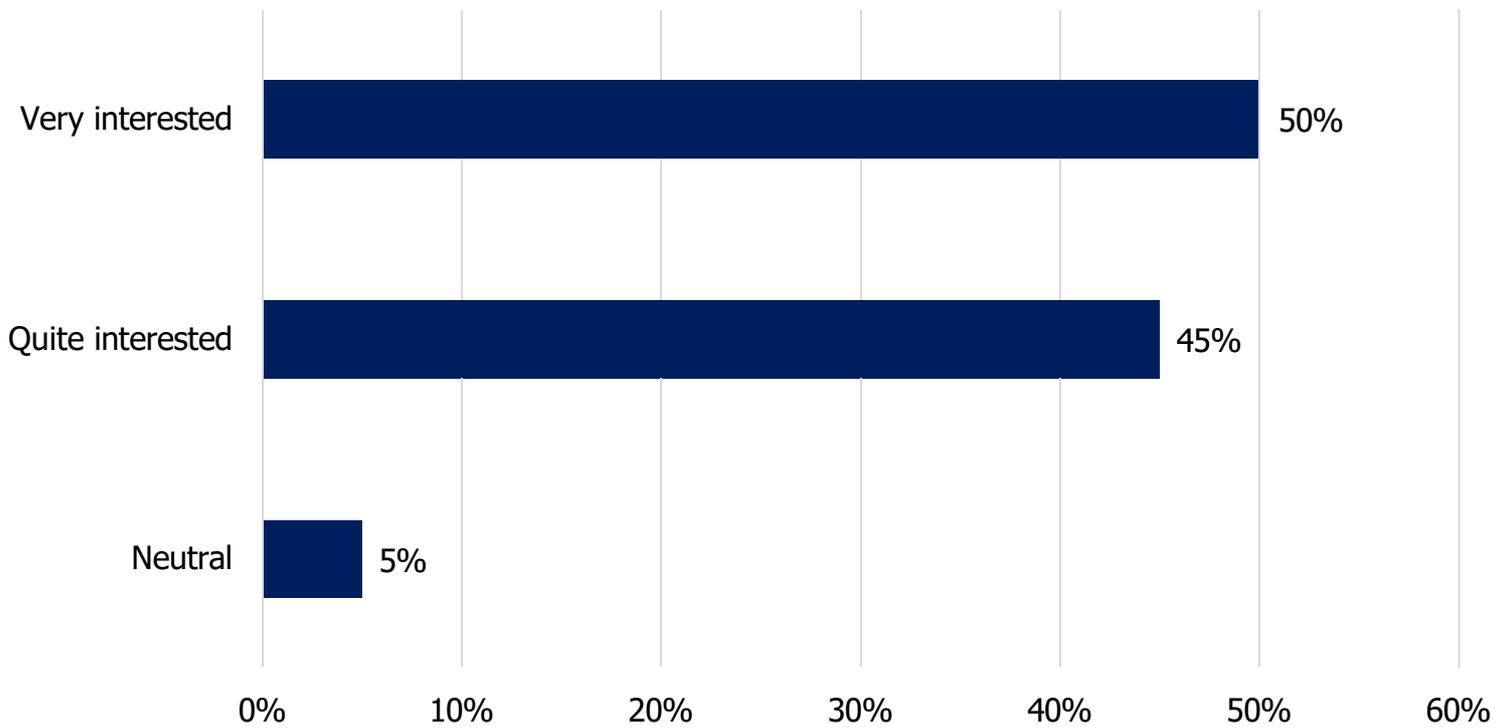
Is this your preferred method of travel?

From the answers selected above, **89%** of non-users said this was their preferred method of travel



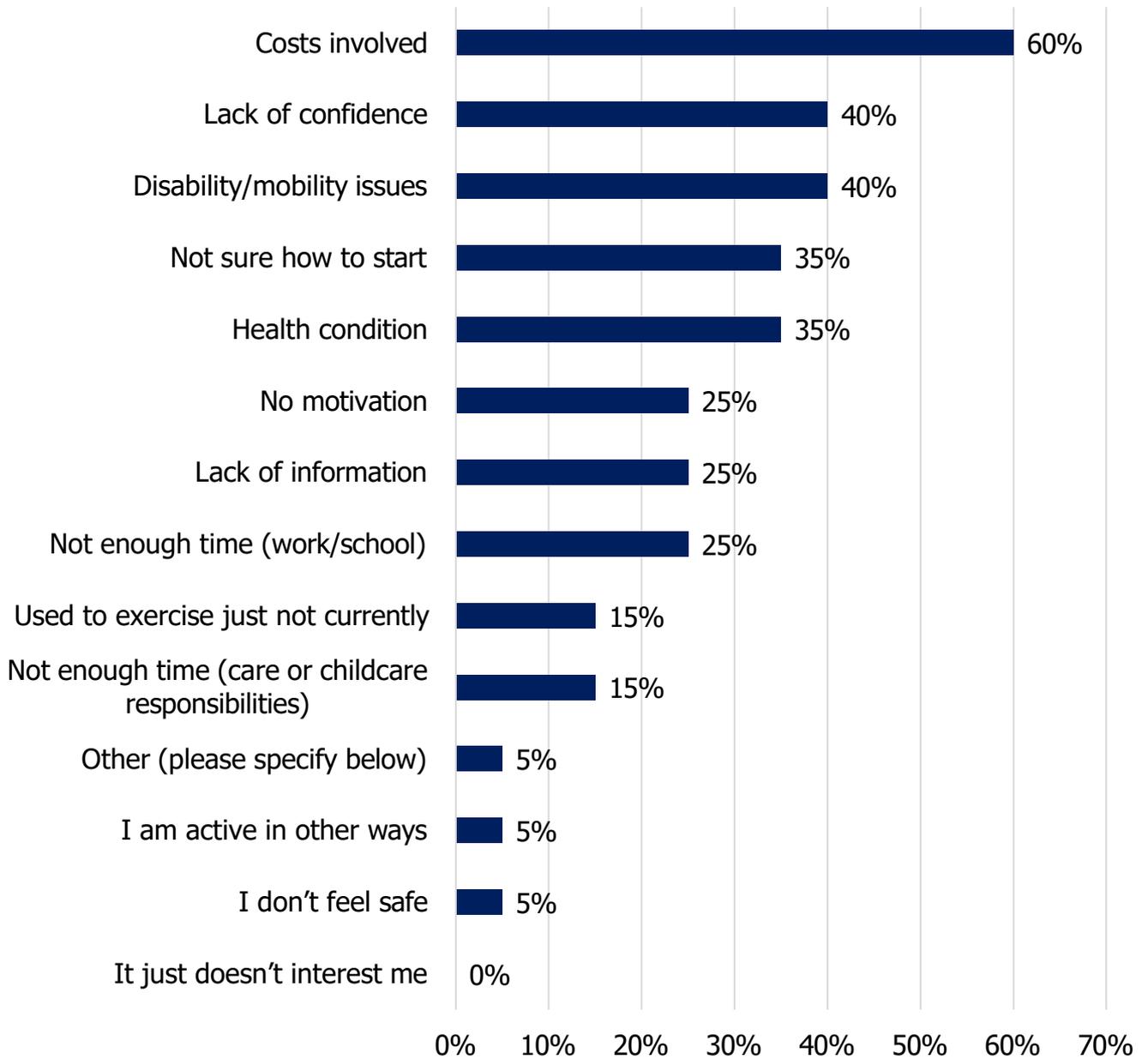
■ Yes ■ No

How interested are you in getting more active?



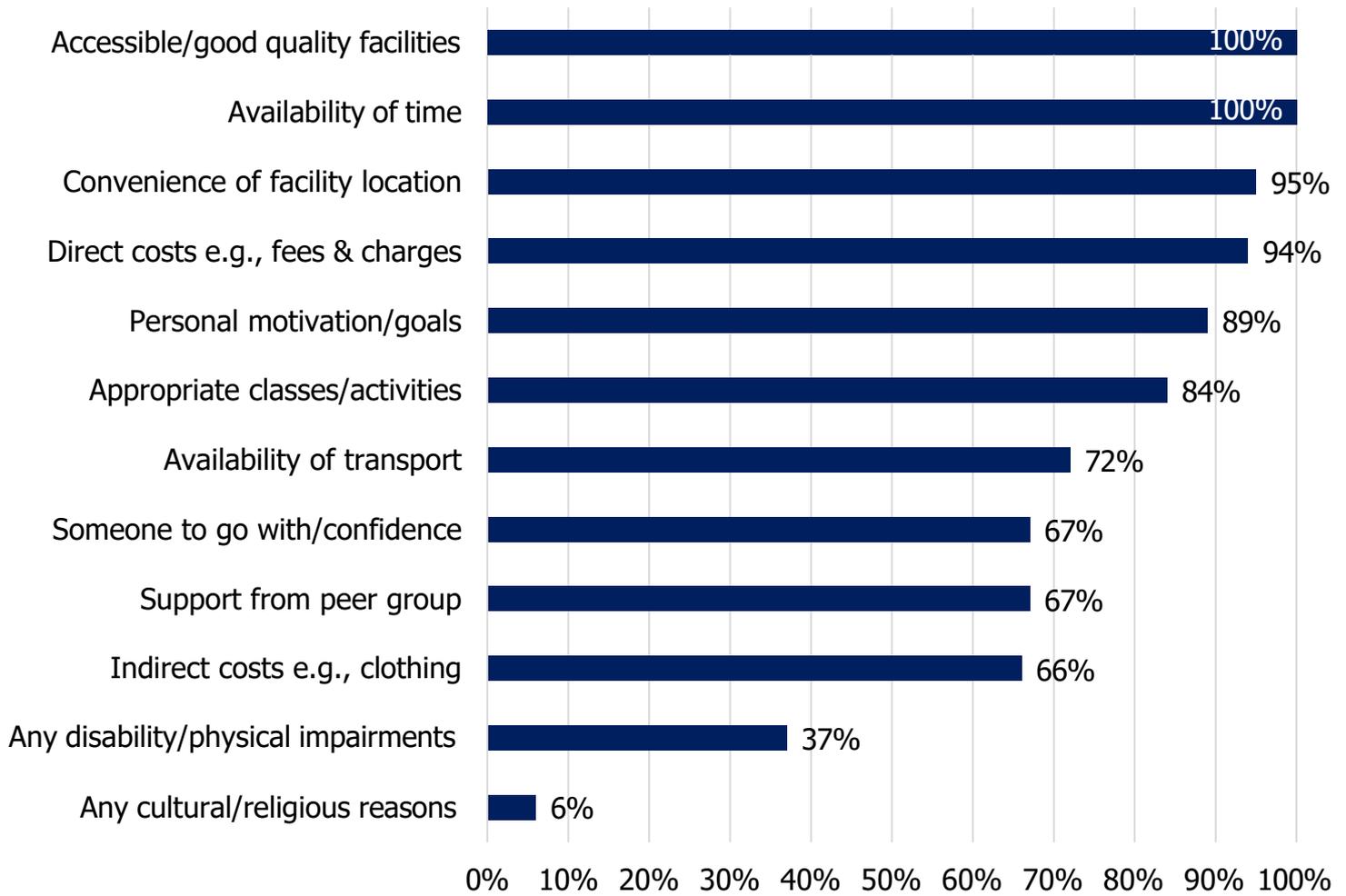
Of the 20 respondents who stated 'I don't exercise (i.e. did less than 30 minutes per week)', **95%** said they were 'Interested' in getting more active

What are the main reasons you are currently not exercising?



'Costs involved' was the biggest factor preventing them from exercising

How important are the following when you think about doing more physical activity/exercise? (Very important and Quite important %)

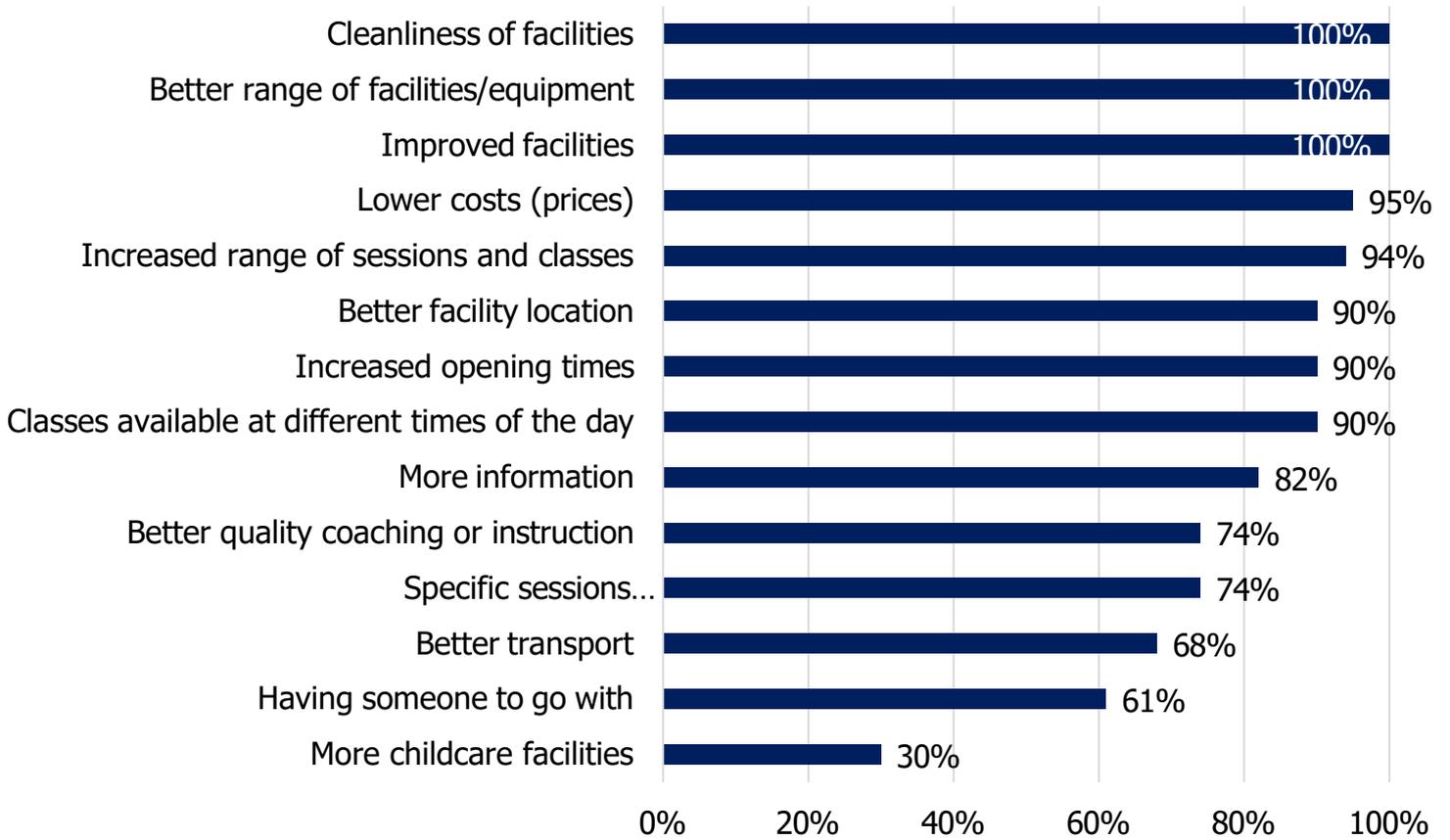


'Accessible/good quality facilities' and 'Availability of time' were the most important factors when thinking about doing more physical activity or exercise

How important are the following when you think about doing more physical activity/exercise? (Very important and Quite important %)	Wandsworth Council	Benchmark
Any cultural/religious reasons	6%	5%
Any disability/physical impairments	37%	28%
Indirect costs e.g., clothing	66%	32%
Support from peer group	67%	46%
Someone to go with/confidence	67%	
Availability of transport	72%	37%
Appropriate classes/activities	84%	67%
Personal motivation/goals	89%	78%
Direct costs e.g., fees & charges	94%	71%
Convenience of facility location	95%	
Availability of time	100%	75%
Accessible/good quality facilities	100%	84%

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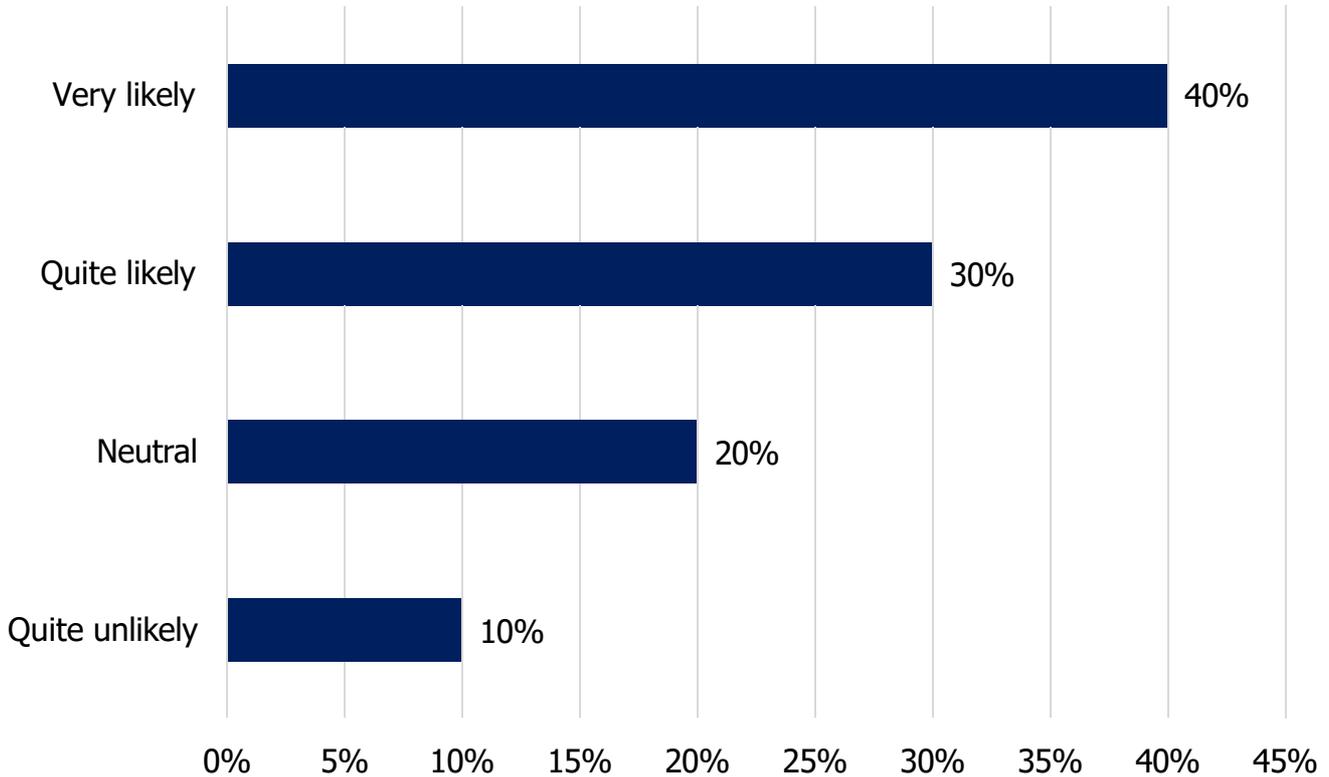
To what extent would the following things encourage you start doing more physical activity/exercise? (Somewhat and Very much %)



'Cleanliness of facilities', 'Better range of facilities/equipment' and 'Improved facilities' were the main factors that would encourage people to participate in more physical activity or exercise

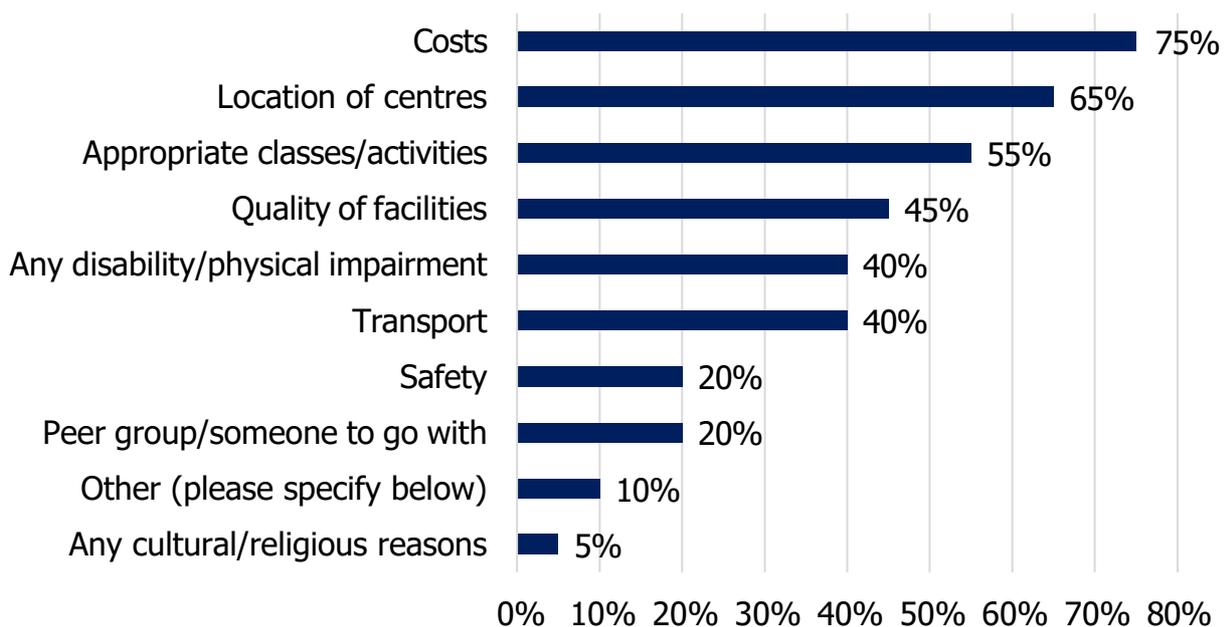
To what extent would the following things encourage you start doing more physical activity/exercise? Somewhat and Very much %	Wandsworth Council	Benchmark (Encourage & Strongly encourage)
More childcare facilities	30%	28%
Having someone to go with	61%	
Better transport	68%	49%
Specific sessions (Quiet/Disability/LGBT/Women/Family Friendly)	74%	44%
Better quality coaching or instruction	74%	
More information	82%	67%
Classes available at different times of the day	90%	82%
Increased opening times	90%	76%
Better facility location	90%	
Increased range of sessions and classes	94%	77%
Lower costs (prices)	95%	86%
Improved facilities	100%	86%
Better range of facilities/equipment	100%	84%
Cleanliness of facilities	100%	86%

If you were to start exercising, how likely would you be to join a leisure centre?



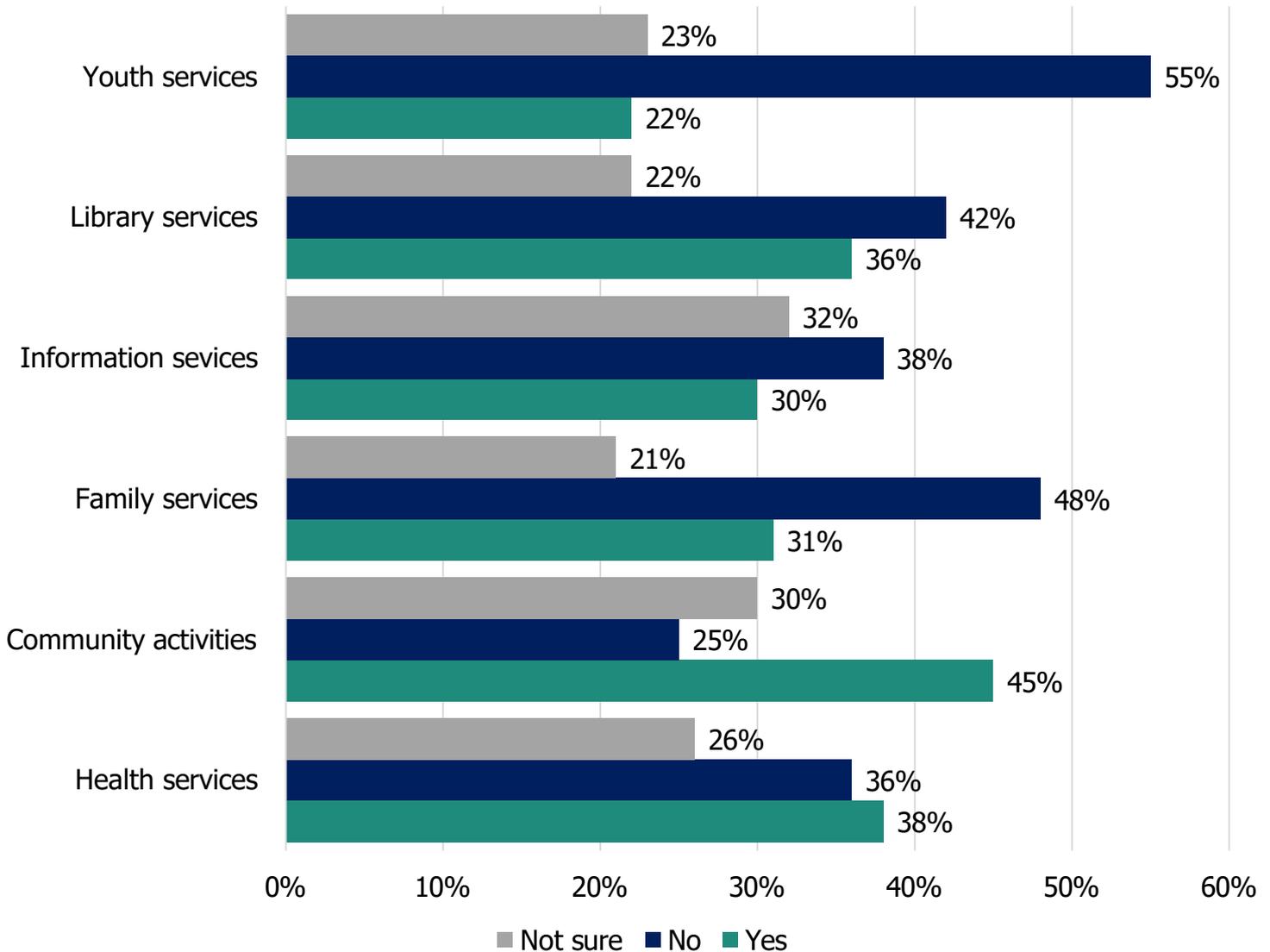
40% said they would be **Very likely** to join a leisure centre if they were to start exercising and **30%** **Quite likely**

Please tell us the reason for your answer to the previous question



75% (15 of those that don't exercise) chose '**Costs**' as one of the reasons that they would be **likely** to join a leisure centre

Would the following facilities on the same site as a leisure centre encourage you to use it more?



'Community activities' was the facility most likely to attract new users if they were on the same site as the leisure centre, with **45%** of the total sample saying 'Yes' to it encouraging them to use it more. This was closely followed by 'Health services' at **38%**

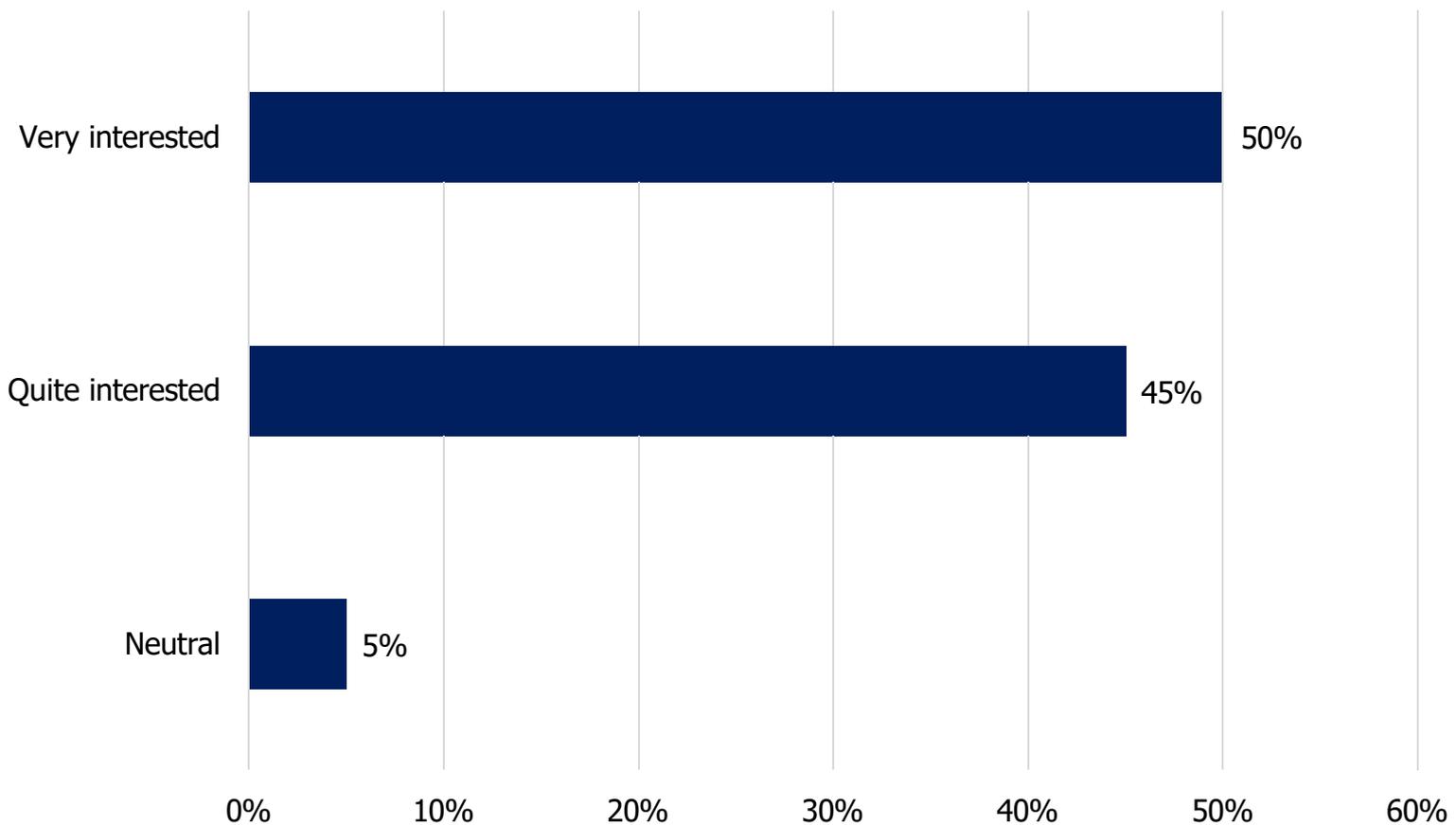
06 Further Analysis

Breakdown by those that are "inactive"

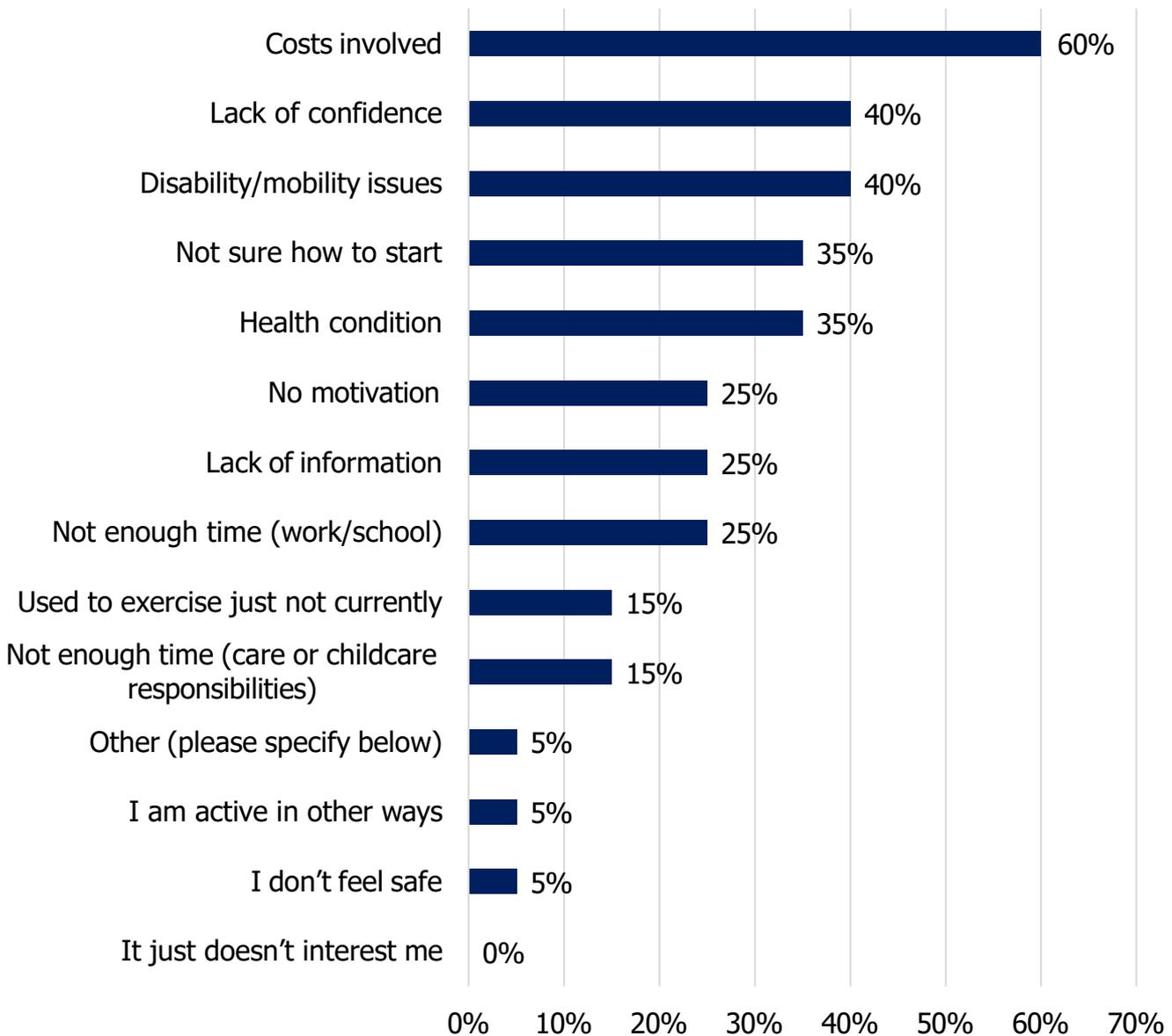
Those that selected 'I don't exercise (i.e. did less than 30 mins per week)' to the question: 'Please select the statement that most applies to you'

(Sample 20)

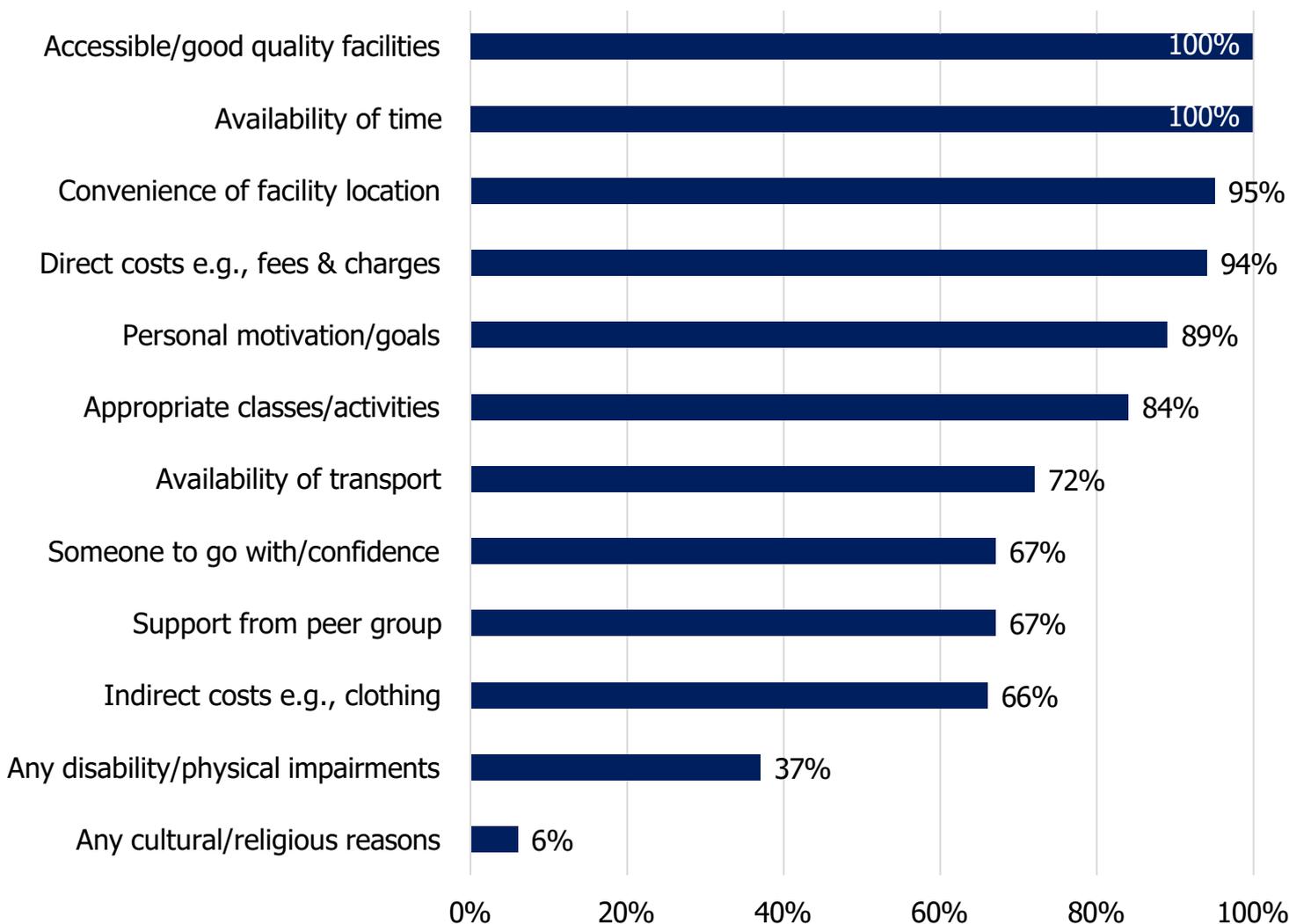
How interested are you in getting more active? (Inactive)



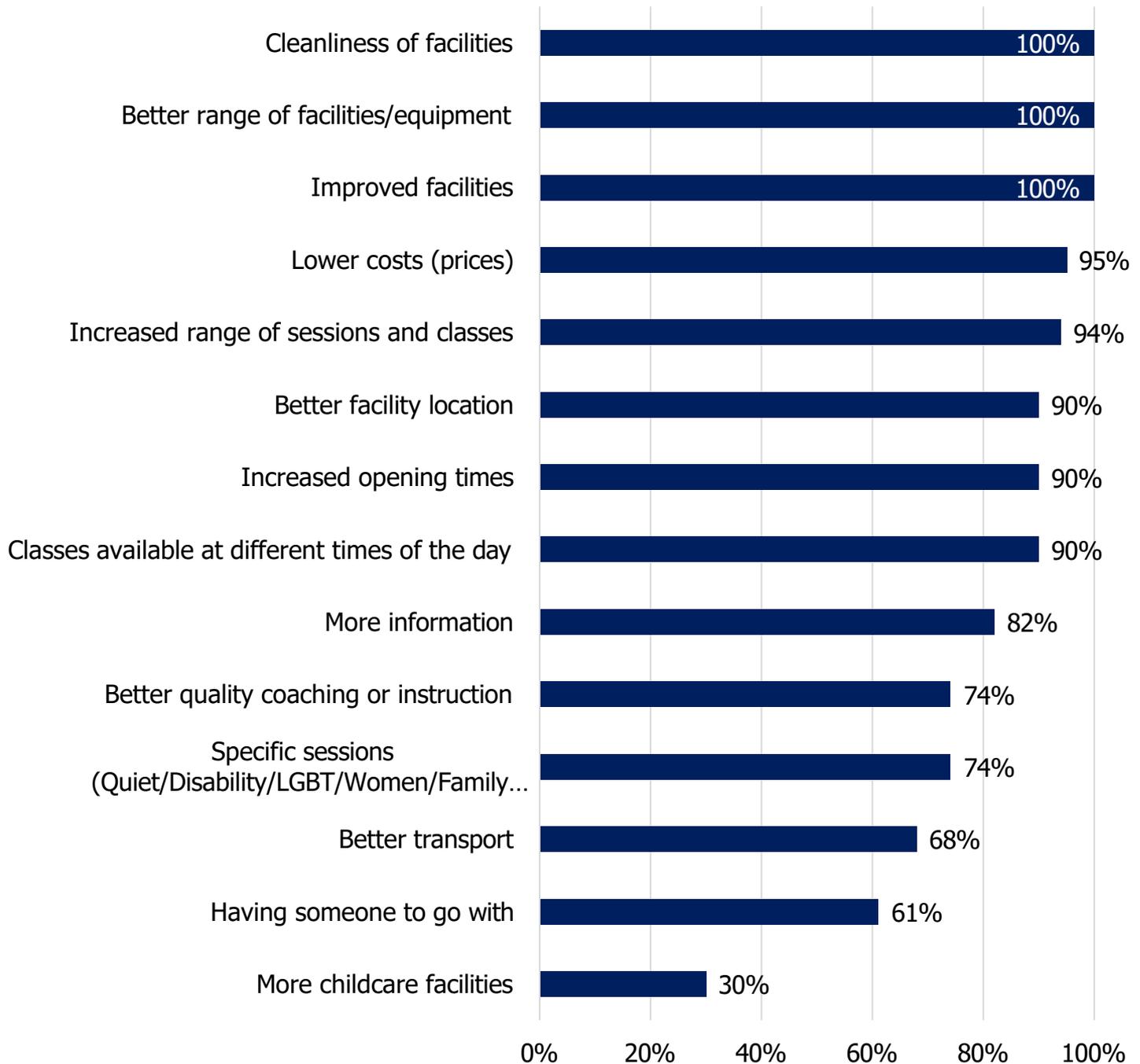
What are the main reasons you are currently not exercising? (Inactive)



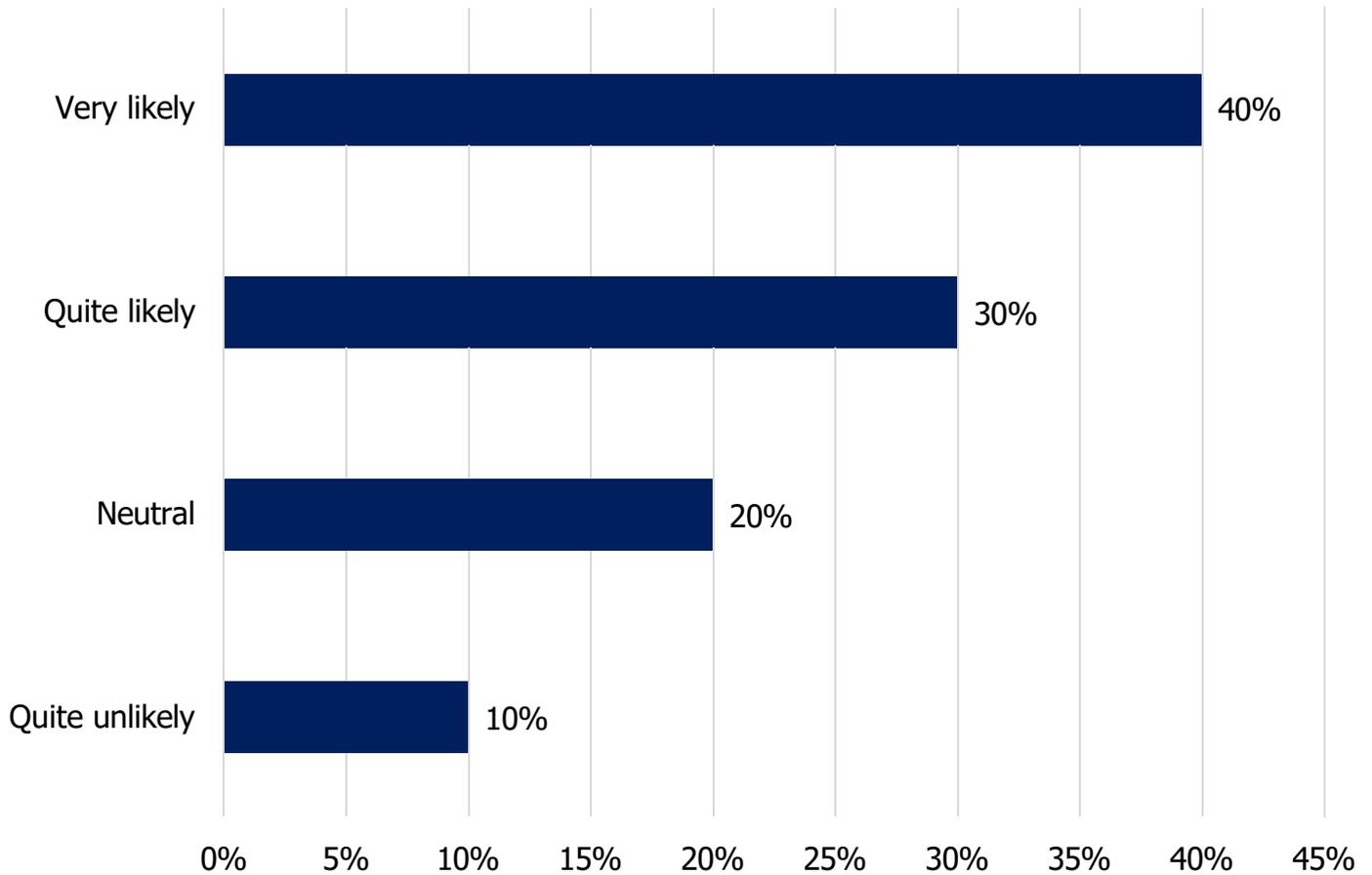
How important are the following when you think about doing more physical activity/exercise? (Very important and Quite important %) (Inactive)



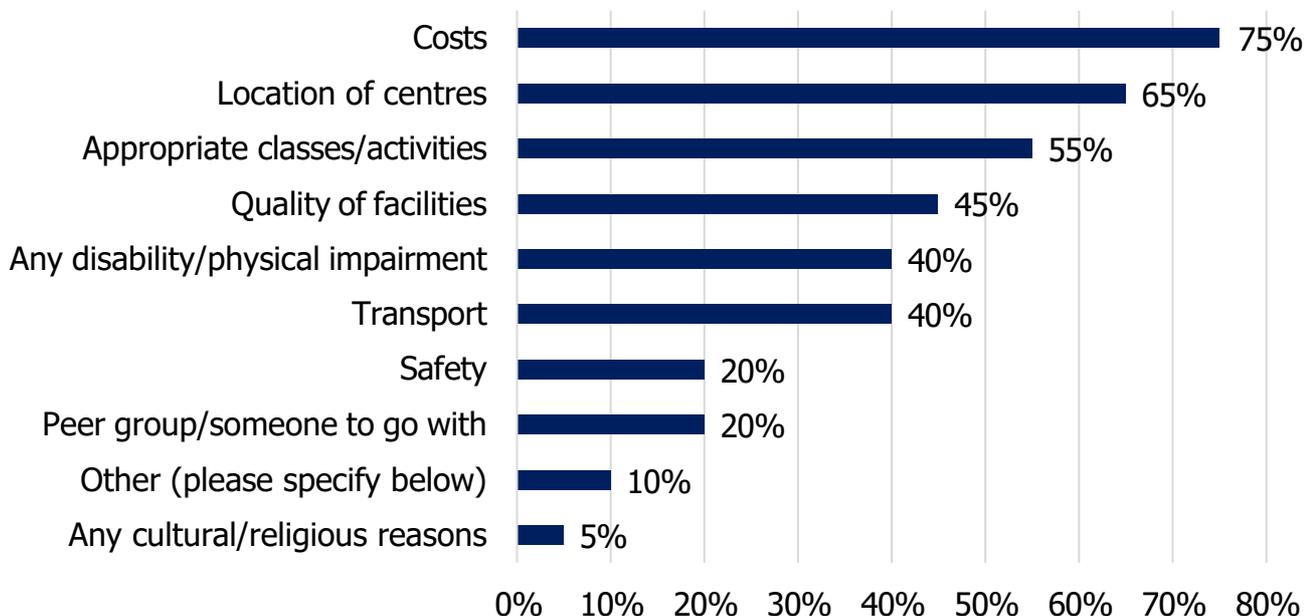
To what extent would the following things encourage you to start doing more physical activity/exercise? (Somewhat and Very much %) (Inactive)



If you were to start exercising, how likely would you be to join a leisure centre? (Inactive)



Please tell us the reason for your answer to the previous question (Inactive)

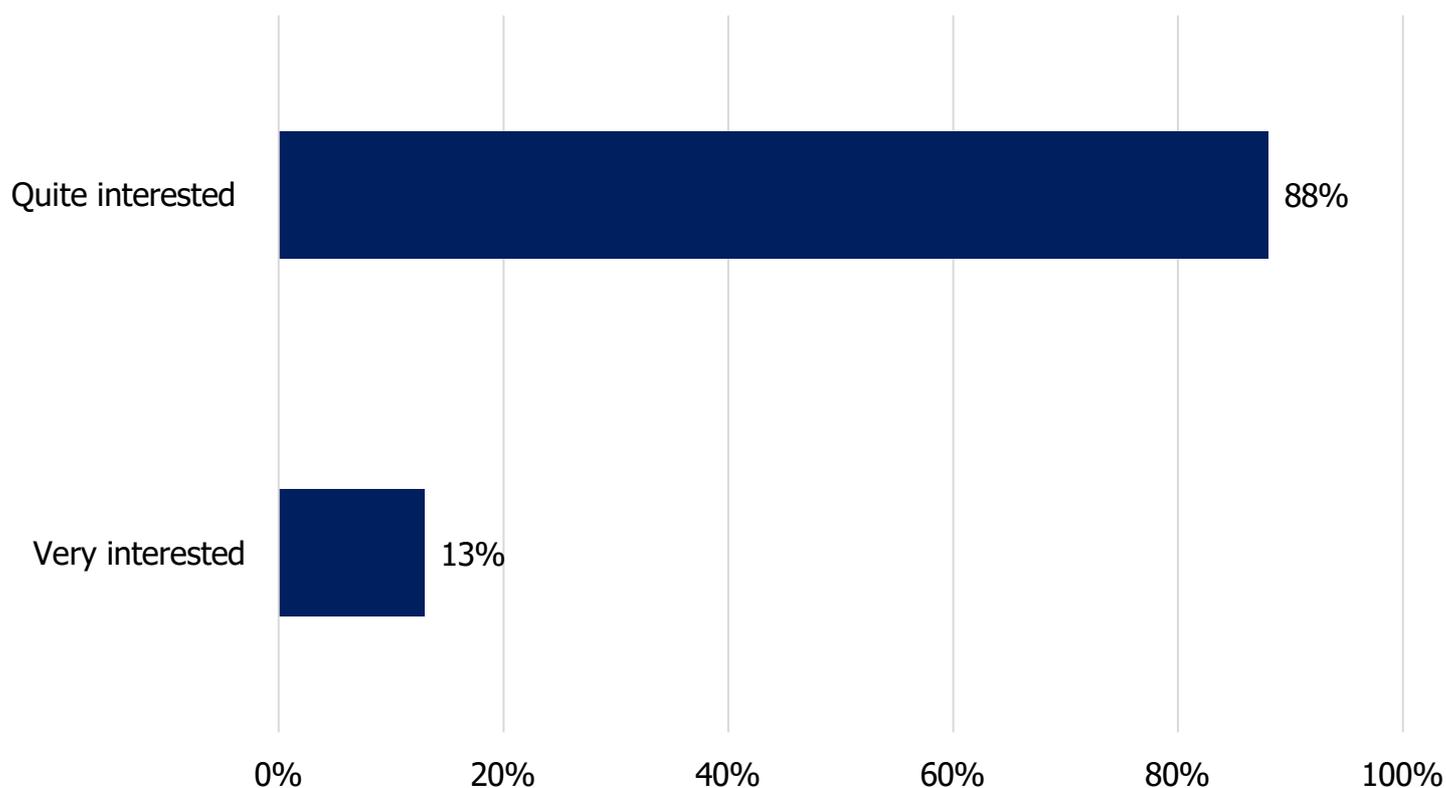


Breakdown by those who consider themselves to have a disability

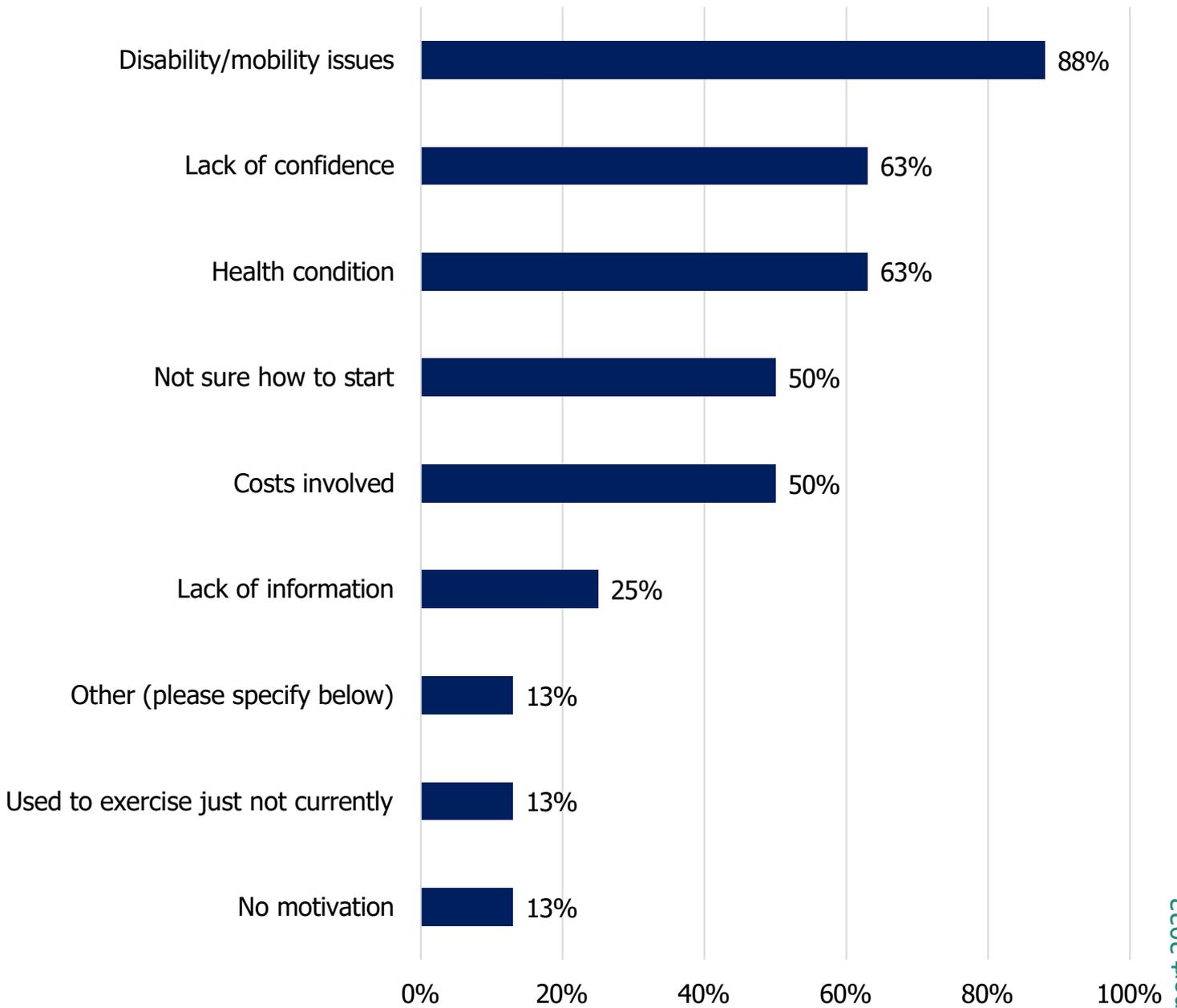
For those people who selected 'Yes' to the following question 'Do you consider yourself to have a disability?'

(Sample 8)

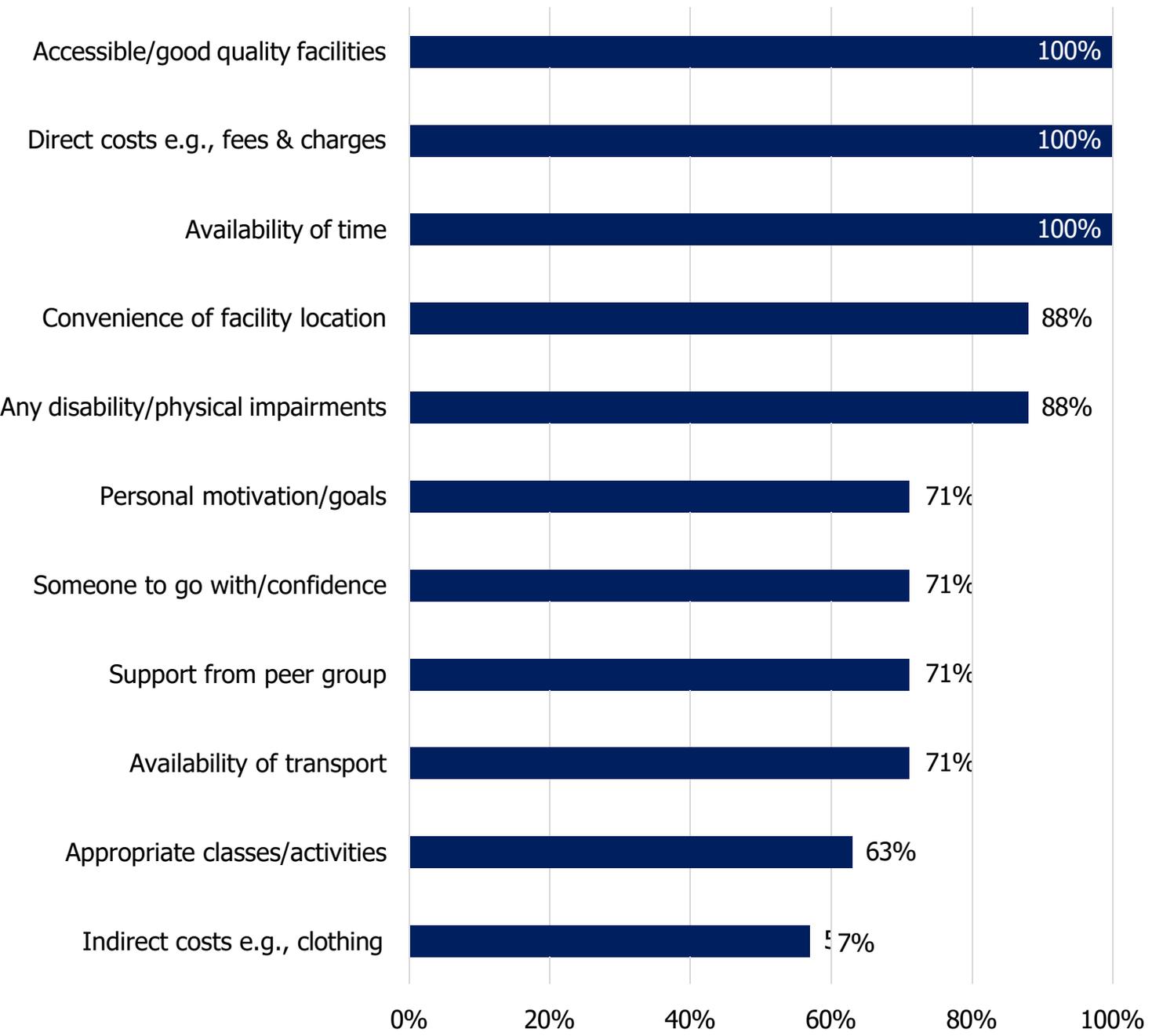
How interested are you in getting more active? (Disability)



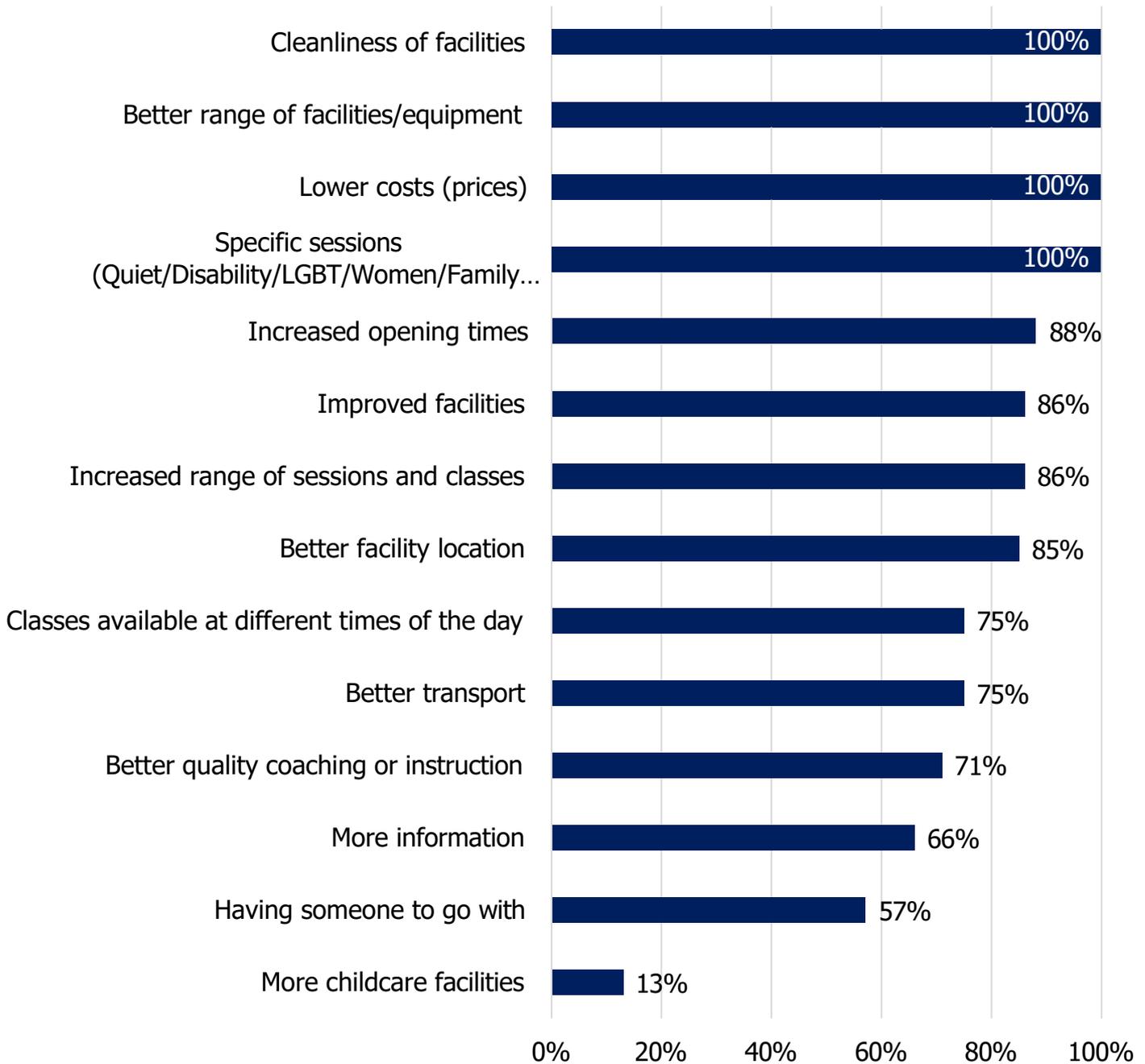
What are the main reasons you are currently not exercising? (Disability)



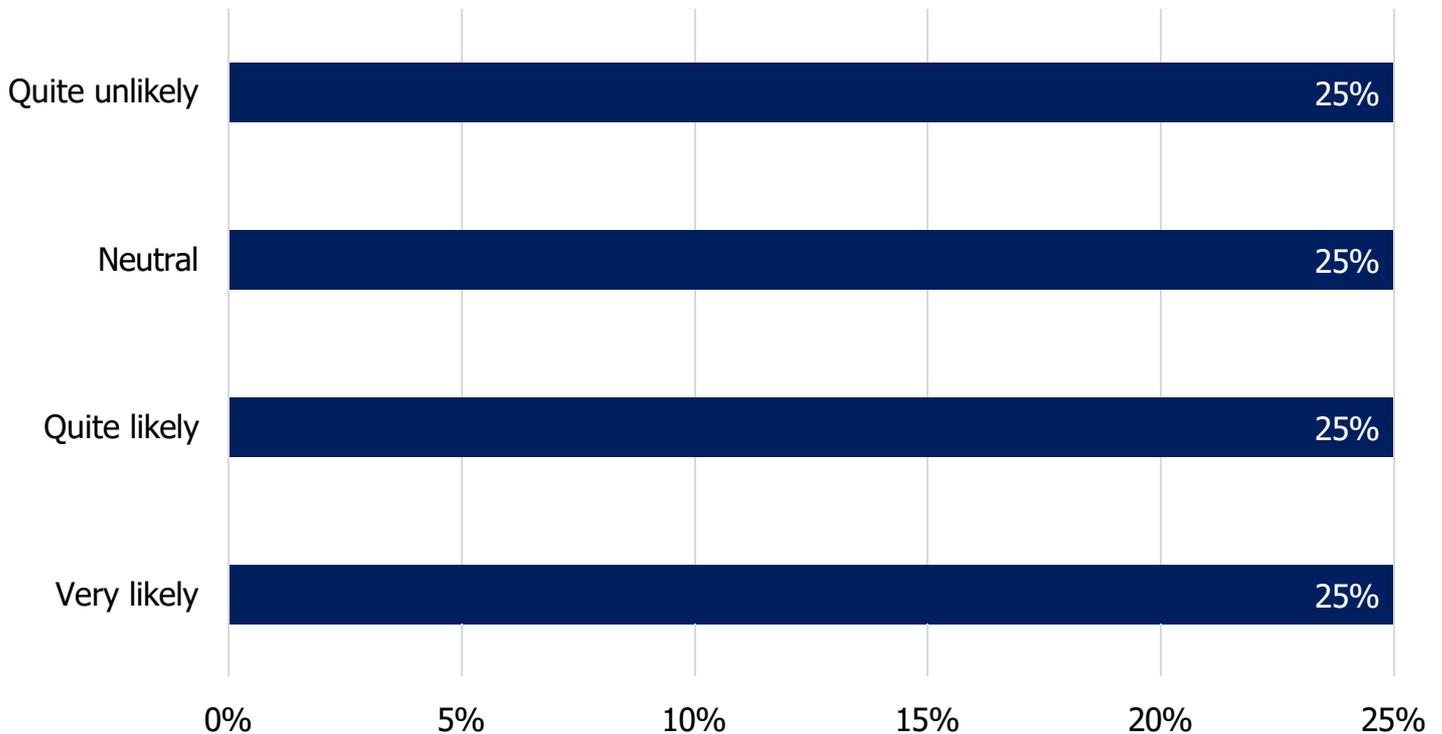
How important are the following when you think about doing more physical activity/exercise? (Quite important and Very important %) (Disability)



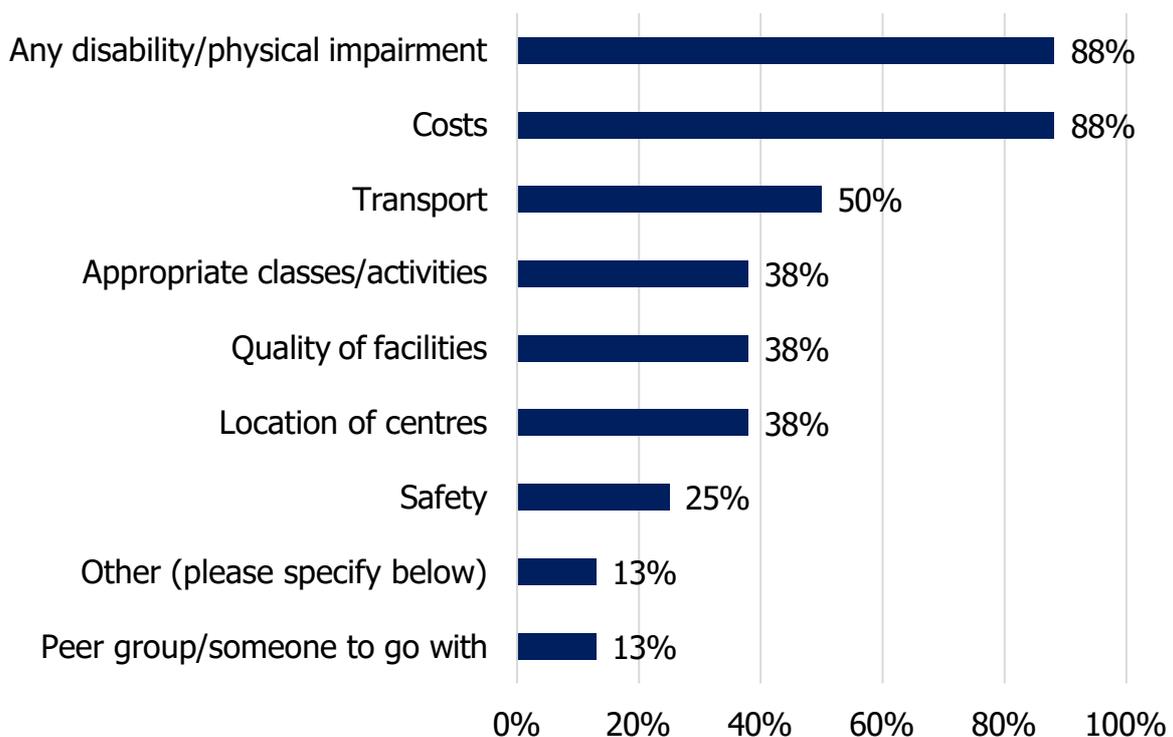
To what extent would the following things encourage you start doing more physical activity/exercise? (Somewhat and Very much %) (Disability)



If you were to start exercising, how likely would you be to join a leisure centre? (Disability)



Please tell us the reason for your answer to the previous question (Disability)

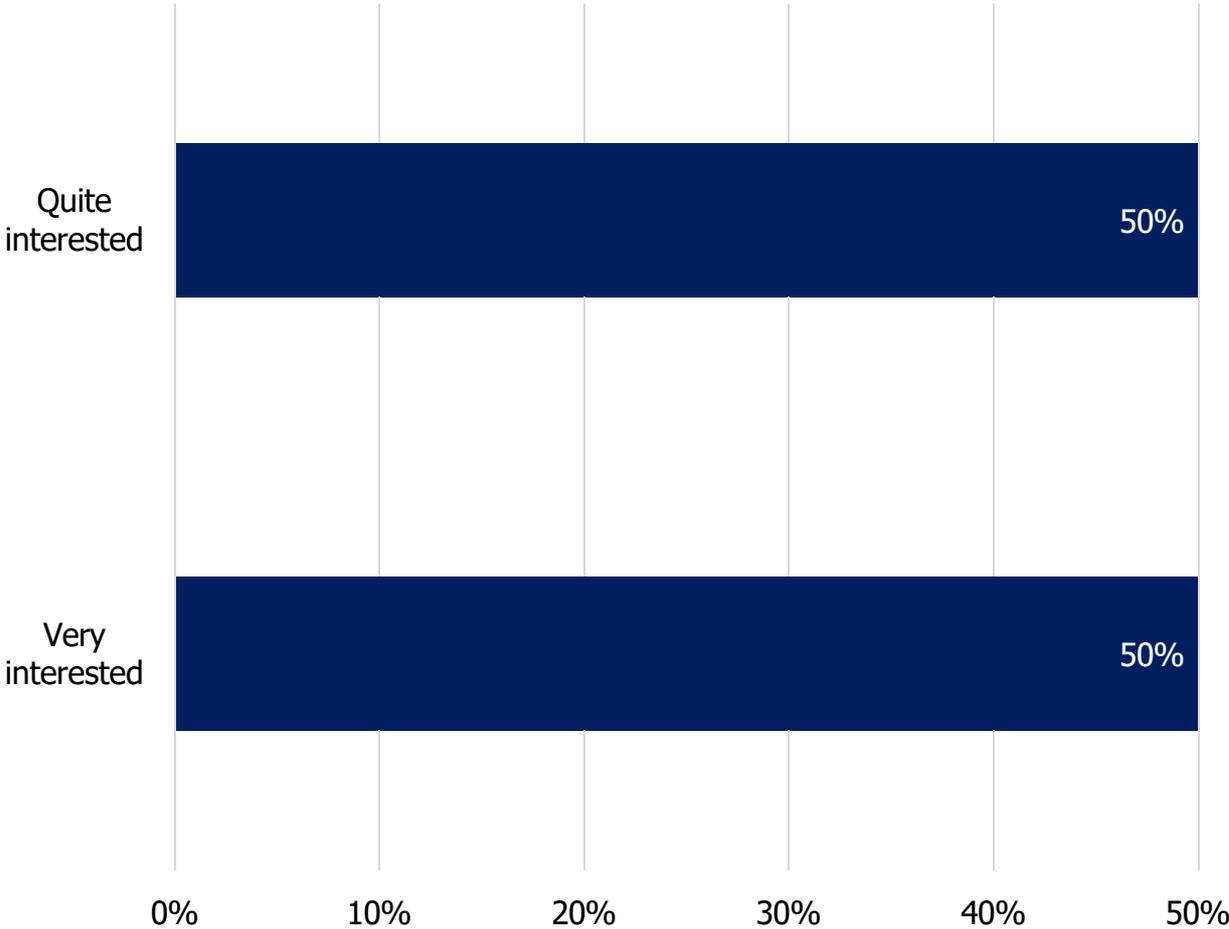


Breakdown by those aged 65+

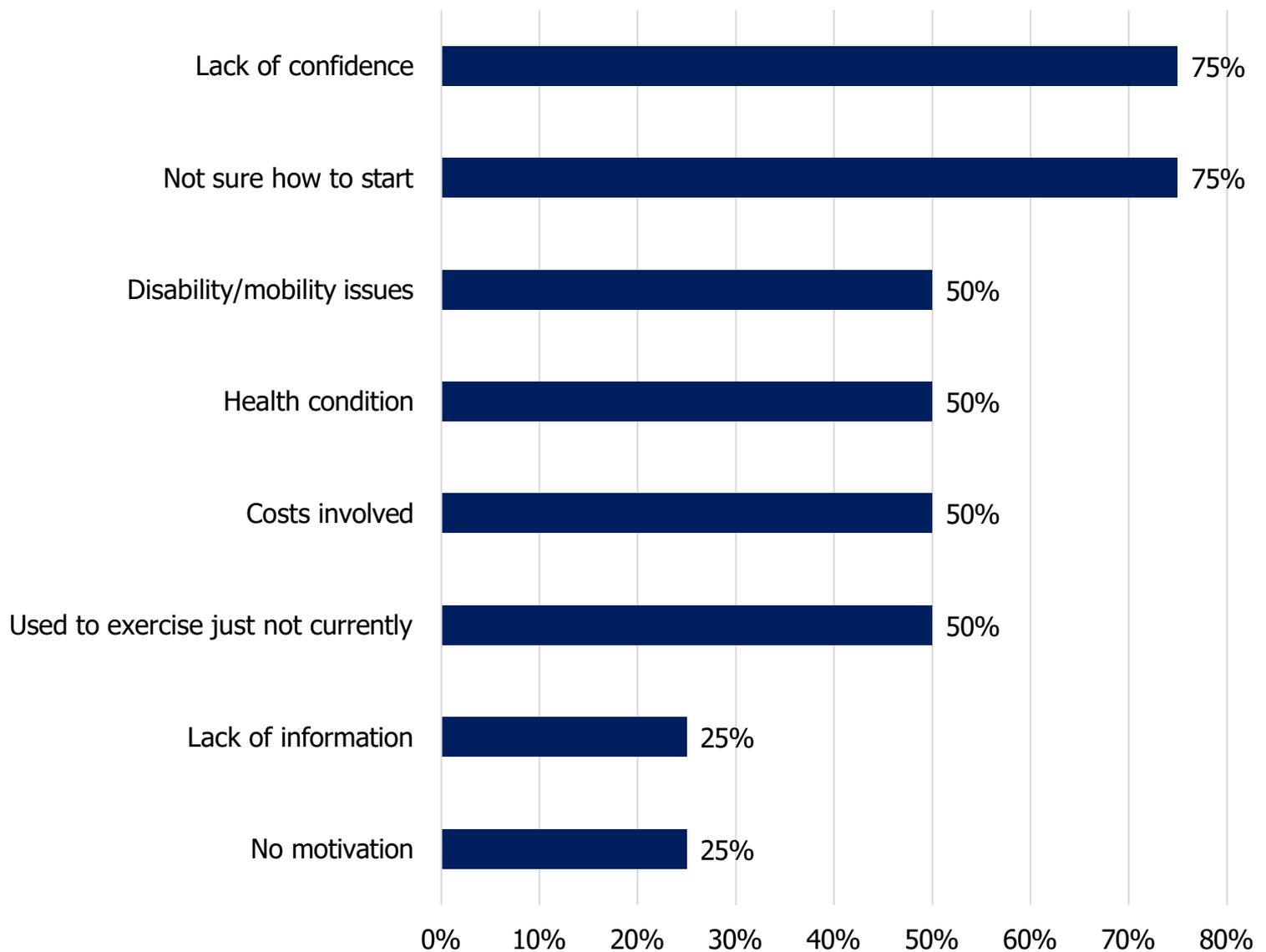
(Sample 4)

How interested are you in getting more active?

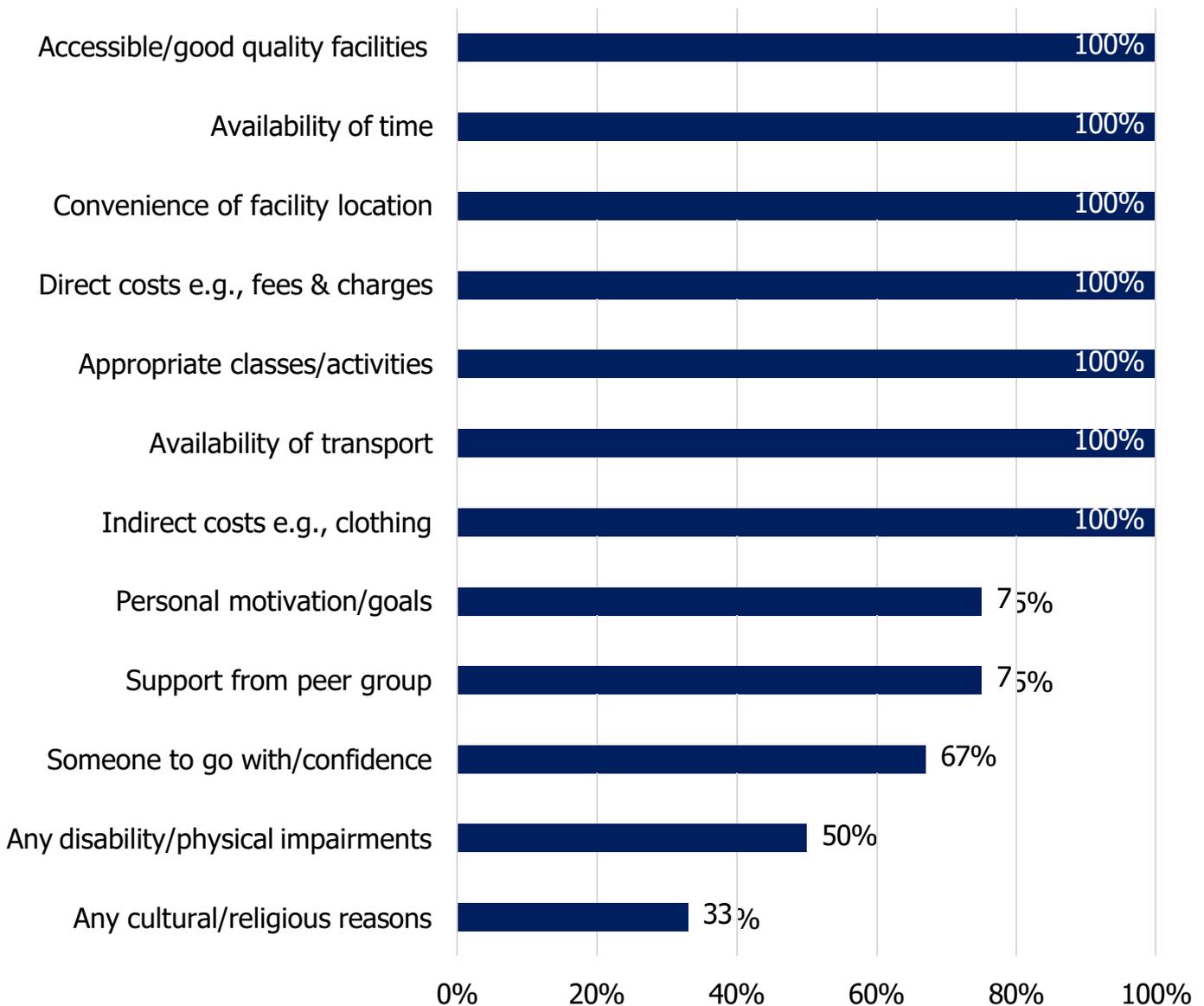
(65+)



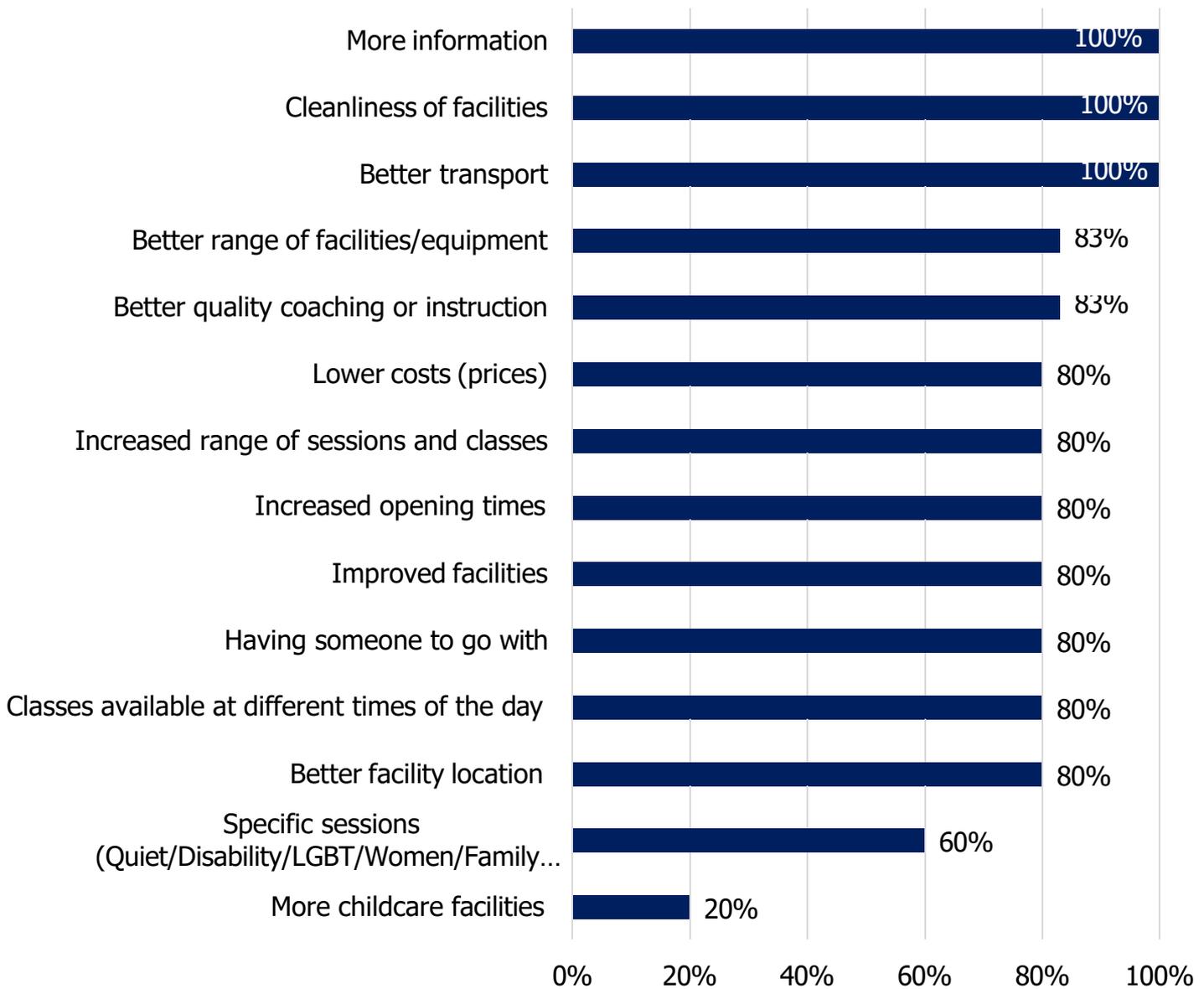
What are the main reasons you are currently not exercising? (65+)



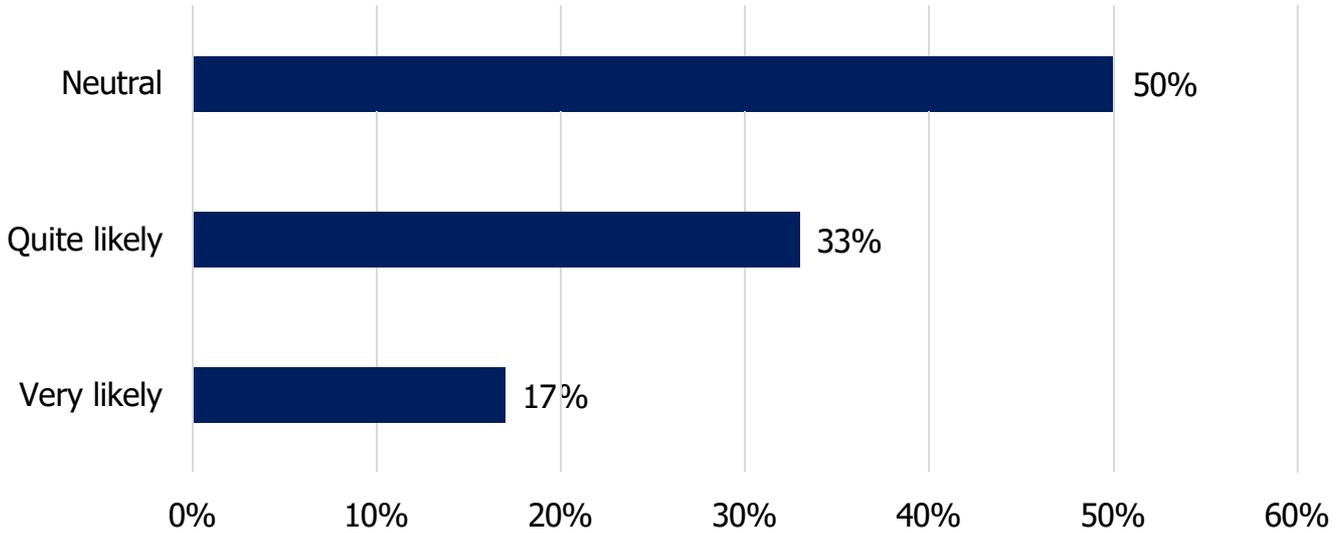
How important are the following when you think about doing more physical activity/exercise? (Very important and Quite important %) (65+)



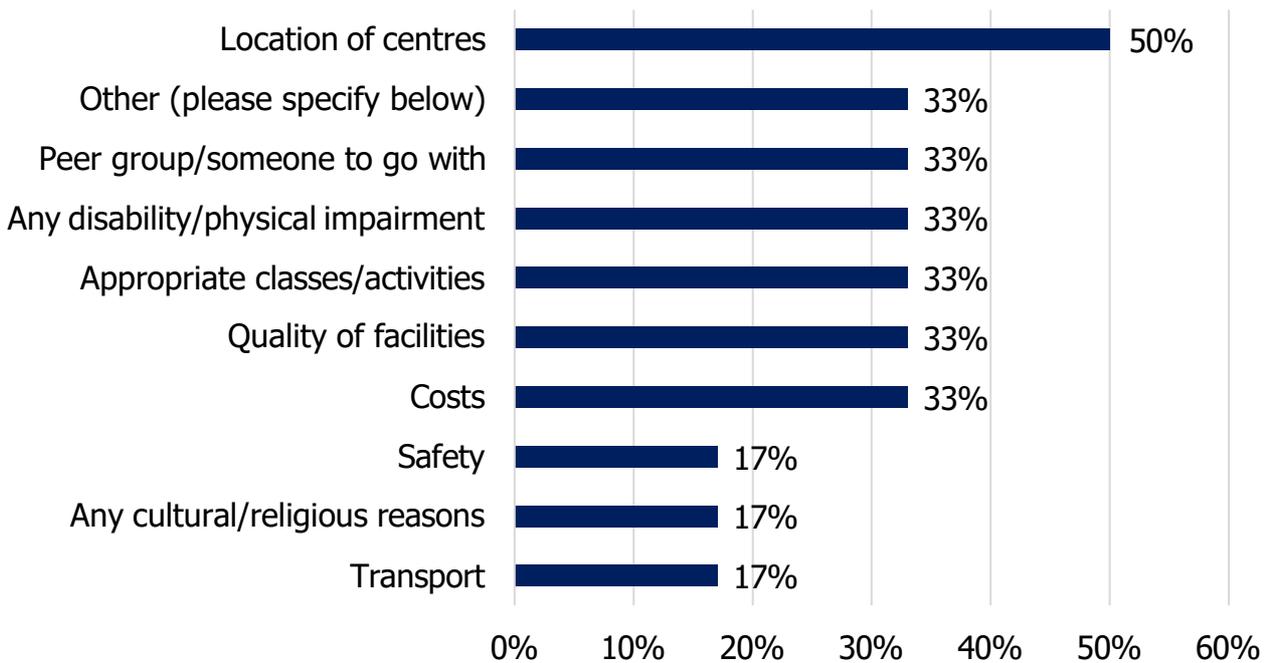
To what extent would the following things encourage you to start doing more physical activity/exercise? (Somewhat and Very Much %) (65+)



If you were to start exercising, how likely would you be to join a leisure centre? (65+)

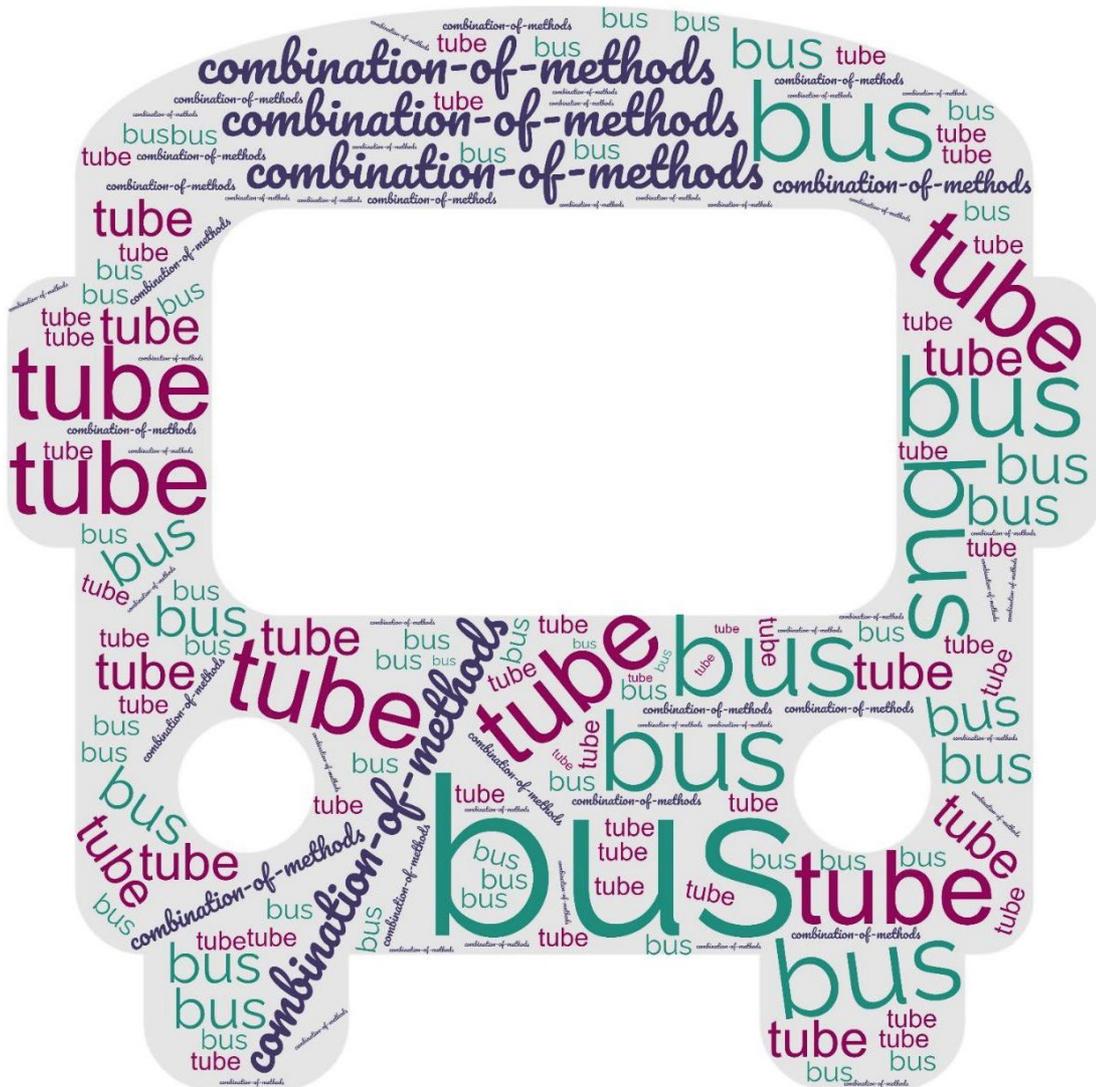


Please tell us the reason for your answer to the previous question (65+)



07 Appendix 1 - Open Responses

How do you currently travel to the centre(s)? If public transport, please specify



Top 3 Trends:
Bus
Tube
Combination of methods

Open Responses

What is the main reason you visit the leisure centre?
Other:



Top 3 Trends:
Children/Family activities
Swimming
Classes

Open Responses

Which facilities are most important to you?

Other:



Top 3 Trends:

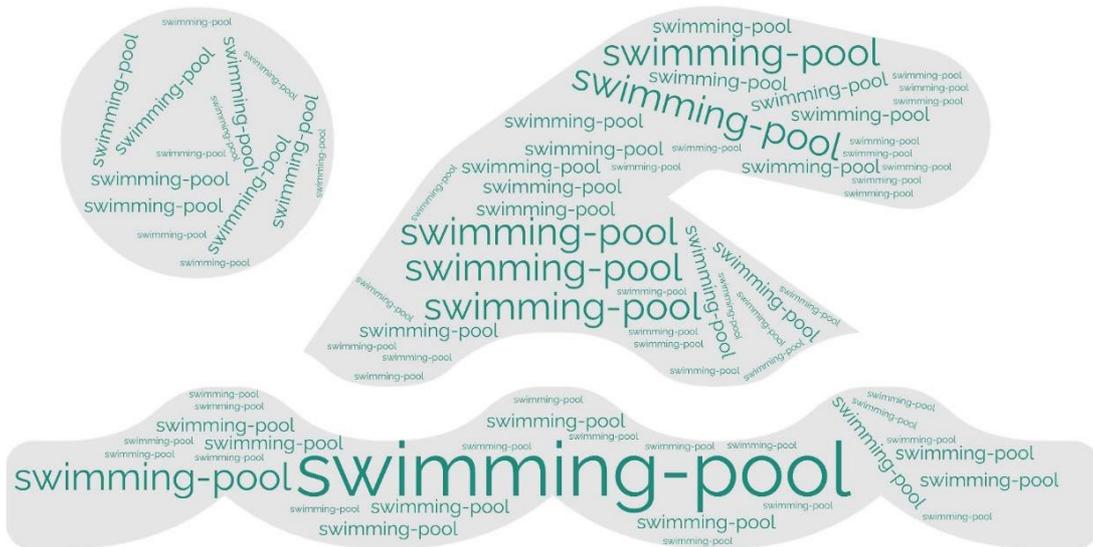
Football

Track

Netball

Open Responses

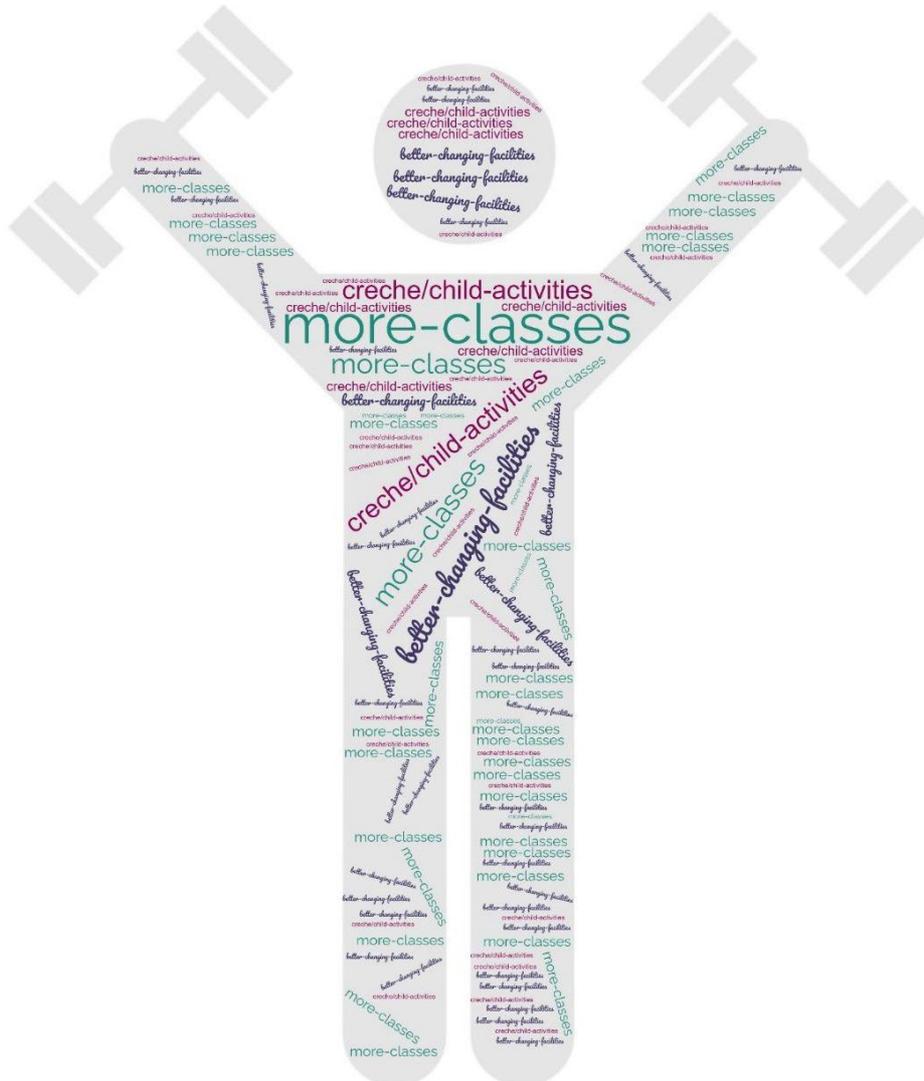
What do you like about the centre(s) you are using?
Other:



Top Trend:
Swimming Pool

Open Responses

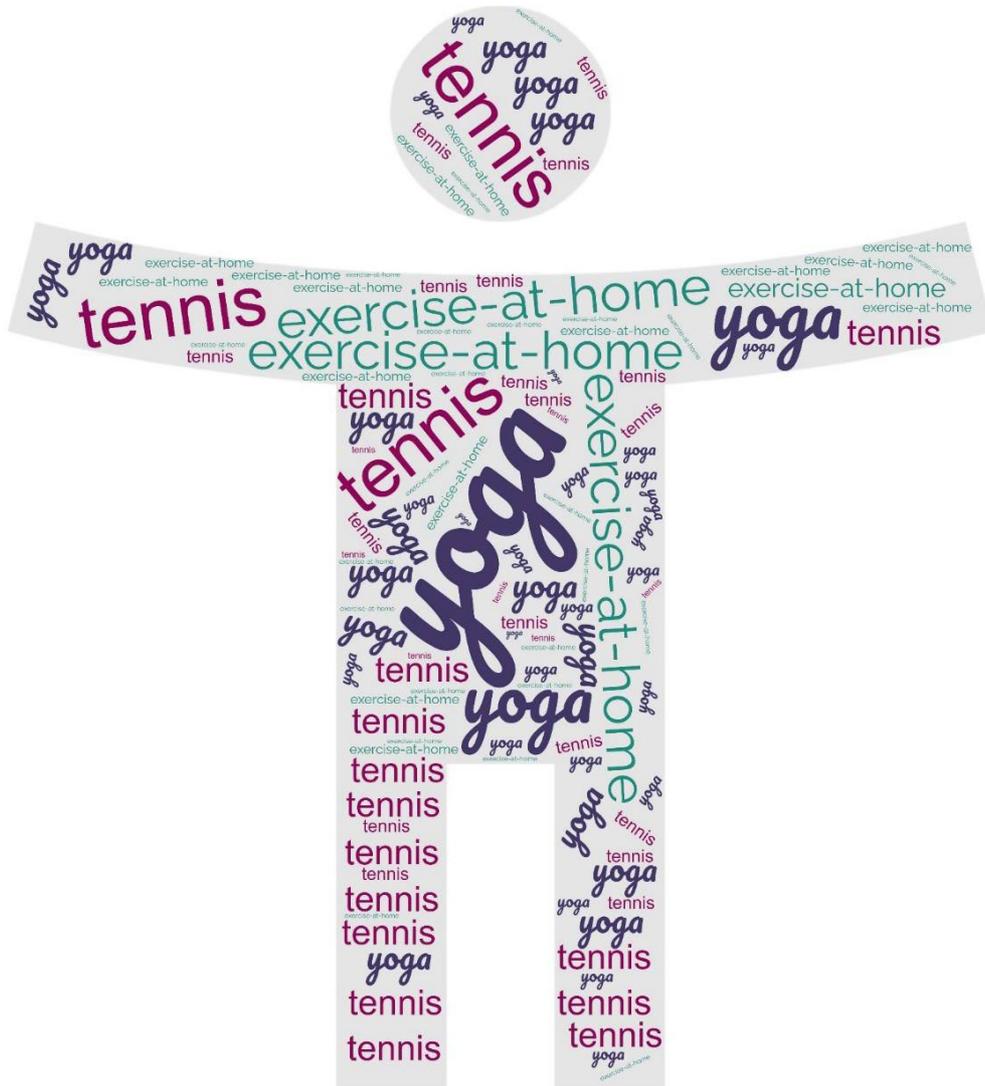
Is there anything that you feel is missing at the leisure centre that you or your family would use?



Top 3 Trends:
More classes
Better changing facilities
Creche/Child activities

Open Responses

Which of the below do you currently do?
Other:



Top 3 Trends:
Exercise at home
Yoga
Tennis

Open Responses

What are the reasons you do not use a public leisure centre?

Other:



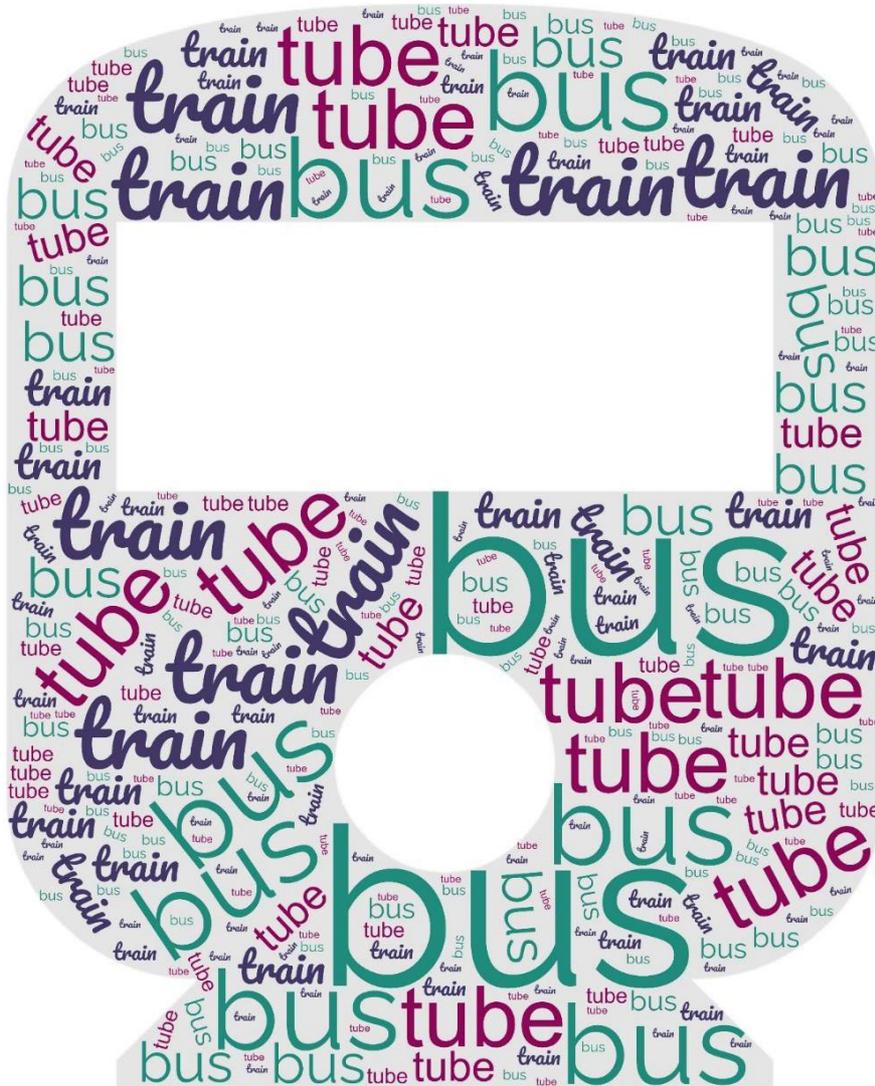
Top 2 Trends:

Cost

Lack of classes/sessions

Open Responses

How do you currently travel to where you exercise?
Public transport, please specify:



Top 3 Trends:

- Bus
- Tube
- Train

