The Survey in numbers

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

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

- Gym or fitness centre 27,915 (44.1%)
- Group exercise classes 17,589 (27.8%)
- Swimming (casual or lessons) 13,730 (21.7%)
- *Other (please specify) 2,647 (4.2%)
- Sports e.g. football/squash etc. 1,375 (2.2%)

Total Responses 63,256 (100%)

*Further analysis of this data can be provided on request*
Significantly less active, with 52% of respondents stating that they have been less active since the lock down, with only 22% saying they have been more active.

Since your leisure/sports centre/gym went into lock down 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...?

- Use it about the same: 66.0%
- Use it more: 21.8%
- Use it less: 8.3%
- Not use it at all: 4.0%

Total Responses: 63,244

The National Post Lockdown Recovery Survey Summary report May 2020
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%)

*Further analysis of this data can be provided on request.
Over half of customers state they will value their centre/club more when they return.

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

- **51.8%** Value it more
- **43.3%** Value it the same
- **5.0%** Value it less

Total Responses: 62,732
Digital offering will be important to a significant minority of returning customers?

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?

<table>
<thead>
<tr>
<th>Response</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perhaps/maybe</td>
<td>30,737</td>
<td>49.3%</td>
</tr>
<tr>
<td>Definitely not</td>
<td>19,860</td>
<td>31.9%</td>
</tr>
<tr>
<td>Yes definitely</td>
<td>11,756</td>
<td>18.9%</td>
</tr>
<tr>
<td>Total Responses</td>
<td>62,353</td>
<td>100%</td>
</tr>
</tbody>
</table>

The National Post Lockdown Recovery Survey Summary report May 2020
Looking forward would you say you are prepared to allocate more time to your health and wellbeing through sport, exercise and being active?

The National Post Lockdown Recovery Survey Summary report May 2020
But they are not prepared to spend more money on being active.

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

<table>
<thead>
<tr>
<th>Option</th>
<th>Responses</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>The same money</td>
<td>51,921</td>
<td>82.3%</td>
</tr>
<tr>
<td>Less money</td>
<td>6,464</td>
<td>10.2%</td>
</tr>
<tr>
<td>More money</td>
<td>4,711</td>
<td>7.5%</td>
</tr>
<tr>
<td><strong>Total Responses</strong></td>
<td><strong>63,096</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

The National Post Lockdown Recovery Survey Summary report May 2020
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?

<table>
<thead>
<tr>
<th>Activity</th>
<th>Responses</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Motivation from gym/class instructors</td>
<td>27,826</td>
<td>45.8%</td>
</tr>
<tr>
<td>Socialising</td>
<td>18,409</td>
<td>30.3%</td>
</tr>
<tr>
<td>Competitive sport</td>
<td>7,780</td>
<td>12.8%</td>
</tr>
<tr>
<td>Instruction from sports/swimming coaches etc.</td>
<td>6,776</td>
<td>11.1%</td>
</tr>
<tr>
<td>Total Responses</td>
<td>60,791</td>
<td>100%</td>
</tr>
</tbody>
</table>

The National Post Lockdown Recovery Survey Summary report May 2020
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...?

- About the same: 59.1% (37,299 responses)
- Less comfortable: 23.0% (14,487 responses)
- More comfortable: 17.9% (11,327 responses)
- Total Responses: 63,256 (100%)

The National Post Lockdown Recovery Survey Summary report May 2020
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?

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>The cleanliness of the centre</td>
<td>31%</td>
<td>57,246</td>
</tr>
<tr>
<td>New procedures and processes to implement social distancing measures</td>
<td>25%</td>
<td>46,422</td>
</tr>
<tr>
<td>(if required/recommended)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The friendliness of the staff</td>
<td>22%</td>
<td>39,932</td>
</tr>
<tr>
<td>The support and guidance given by the staff</td>
<td>22%</td>
<td>39,536</td>
</tr>
</tbody>
</table>

Total Responses: 183,136 (100%)

The National Post Lockdown Recovery Survey Summary report May 2020
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
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