



*LONDON BOROUGH OF
RICHMOND UPON THAMES*

Richmond upon Thames 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, Richmond upon Thames 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 by Richmond upon Thames Council.

Research Methods

The data within this report was gathered using an online survey created and promoted by the client. The survey was completed between the 26th of October and the 25th of November 2022 and is a self-selection online survey, with a sample size of 1,295, with over 80% 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", 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 client.

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

- 94% of the sample live in the local area.
- 80% of respondents said they currently use a leisure facility operated by the Council.
- 18% said they exercise but not at a leisure facility operated by the Council and 3% said they don't exercise (less than 30 minutes per week).
- The centre used the most is 'Pools on the Park' with 59% (677 saying it was their main centre).
- 83% of the people that used a centre said they use their main centre because it is the nearest to their home.
- 35% of users of centres said their main method of travel to their centre was by 'Car'. This was closely followed by 'On foot' at 32%.
- Based on their last visit to the centre, 70% of users were 'Satisfied' with their overall experience.
- 62% of users stated they only ever use the leisure centre 'As an individual' with just 4% stating they only use it 'With friends'.
- Over half (51%) 'Sometimes' use the leisure centre 'With their family/ children'.
- 77% said the main reason they visited the leisure centre was 'To exercise', followed by 10% who visited for 'Family activities (e.g. swimming lessons)'.
- 'Use of the Indoor Pool' was the facility that was rated as most important by 67% of users.
- 72% said the thing they liked the most about the centre they were using was the 'Location' followed by 61% who said they liked the 'Facilities (e.g., pools, gym, courts, halls, pitches, soft play)'.

Key Findings

Exercise

- 'Outside/in 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, 69% stated 'Walking'.
- 'Quality of facilities' was the most common selection as the main reason that non-users do not use a public leisure centre.
- Over half of the non-users (53%) currently travel 'On foot' to where they exercise. 91% said the answer selected was their preferred method of travel.

Barriers and Encouragement Factors for the Inactive

- Of the 36 respondents who stated 'I don't exercise (i.e. did less than 30 minutes per week)', 97% stated they were 'Interested' in getting more active.
- 'Costs involved' was the biggest factor preventing them from exercising. This was closely followed by 'Not sure how to start' and 'Not enough time due to care or childcare responsibilities'.
- 'Accessible/good quality facilities' was the most important factor when thinking about doing more physical activity or exercise.
- 'Cleanliness of facilities' was the main factor that would encourage these people to participate in more physical activity or exercise.
- Nearly half (47%) said they would be quite likely to join a leisure centre if they were to start exercising.
- If 'Community activities' were on the same site as the leisure centre, 33% of the total sample said 'Yes' to it encouraging them to use it more. This was closely followed by 'Health services' at 30%.

Key Findings

Key question responses by target groups

The primary reasons preventing the target groups identified in the table below from currently exercising were varied. For the inactive and those with a long-term disability it was the 'costs involved' but for the 65+ it was the fact that they used to exercise but just don't currently exercise.

Accessible/good quality facilities was the primary factor that was most important to all three target groups when thinking about doing more physical activity.

Cleanliness of facilities was a 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
1 st	Costs involved	Used to exercise just not currently	Costs involved
2 nd	=Not sure where to start Not enough time (care or childcare responsibilities)	=No motivation Lack of information Disability/mobility issues Health condition	Health condition
3 rd	Used to exercise just not currently	=Not sure how to start I am active in other ways Lack of confidence Costs involved	=Not sure how to start No motivation Lack of confidence Disability/mobility issues

= 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	=Accessible/good quality facilities Convenience of facility location	Accessible/good quality facilities
2 nd	Convenience of facility location	Availability of transport	=Personal motivation/goals Direct costs e.g., fees & charges Convenience of facility location Appropriate classes/activities Any disability/physical impairments
3 rd	Direct costs e.g. fees & charges	=Direct costs e.g., fees & charges Any disability/physical impairments	Availability of time

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	=More information Cleanliness of facilities Better transport	=Cleanliness of facilities Better range or facilities/equipment
2 nd	Better range of facilities/equipment	=Better range of facilities/equipment Better quality coaching or instruction	=Improved facilities Having someone to go with Classes available at different times of the day
3 rd	Improved facilities	=Lower costs (prices) Increased range of sessions and classes Increased opening times Improved facilities Having someone to go with Classes available at different times of the day Better facility location	=Lower costs/prices Increased range of sessions and classes Increased opening times Better quality coaching or instruction Better facility location

03 Considerations and Recommendations

The view of the current user

It is important to remember that this survey was completed by four times as many users of local council owned leisure centres, than we would expect there to be in the general community. So, all the responses are going to be biased towards current users and people who are already fairly active and engaged. The numbers of "inactive" people who completed the survey was fairly limited so, again, care needs to be taken drawing too much from the results for this group.

Inactive need specific targeting

Of the small number of respondents who classified themselves as "inactive", nearly all wanted to be more active but cost was the main barrier quoted, followed by lack of information/support and time due to care or childcare commitments. This combination of factors is very common in our experience, and is usually addressed by looking at targeting specific groups with discounted programming and timetabling of "special sessions".

Usage driven by convenience but social element important for maintaining motivation

With 83% stating that the main reason they use the centre they do is because it is the nearest to their home, it reinforces how much convenience and ease of access/use is important to building physical activity into people's everyday lives. Time – and the perceived or actual lack of it – is usually the main reason quoted for not being more active, so making sure that activity opportunities are easy to build into residents daily movements such as going to work, the shops or schools is essential. It also reinforces how important the correct location of leisure centres is to attracting users, particularly new users.

It was also clear from the open text responses that the social element of physical activity, particularly in leisure centres, is a key element in maintaining motivation and keeping exercise habits, even though only 4% stated they go to leisure centres with friends. This can be developed in classes/programmes that are group based, but also facilitated by the provision of social areas, such as cafes, for people to meet and chat after their activity.

Considerations and Recommendations

Health suite and spin/group exercise are common themes

Analysis of the open comments shows that the absence of a Health suite/spa, particularly at Pools in the Park, and the provision of more group exercise/spin space and classes are important issues. When asked which facilities on the same site as a leisure centre encourage you to use it more, six specifically said that they were missing a health suite, while two wanted more studios. But more striking was the numbers that mentioned these facilities when answering the question "Is there anything else you would like us to consider when thinking about the future of leisure centres in the Borough?". Here 74 respondents stated that they were missing a Health suite/Spa whilst 13 wanted more studio space.

Non-users utilise parks and open spaces

Most of the non-users of leisure centres, exercise outdoors in "open spaces", usually by walking and most of them travel to these places on foot. It is important that this "independent exercise" isn't discouraged whilst trying to attract more people to use leisure centres, but the key reason that people are discouraged from using them at the moment is the "quality of facilities". When thinking about this aspect it is important to remember that some adults have not been inside a local leisure centre for many years, perhaps since they were a child, so sometimes their perception of them is based on outdated views that do not reflect modern day provision.

Active travel to centres an opportunity

35% of leisure centre users access their centre by car, but almost as many currently walk. As so many users use a centre that is fairly close to them, combined with 72% of users stating that the thing they liked the most about their centre was its location, there is probably opportunity to increase the number of people walking or biking to their centre with the right encouragement and provision of facilities.

Considerations and Recommendations

Cleanliness more important than ever

Post Covid people's perception of cleanliness has become increasingly important, especially amongst key target groups such as the elderly and those with long term health conditions. There is a small percentage of previous users who have still not returned due to concerns around cleanliness and possible infections, it is therefore important to continue to focus on cleaning protocols and providing reassurance through marketing and information campaigns, as well as initiative with the staff at leisure centres.

Co-locating of community services is attractive

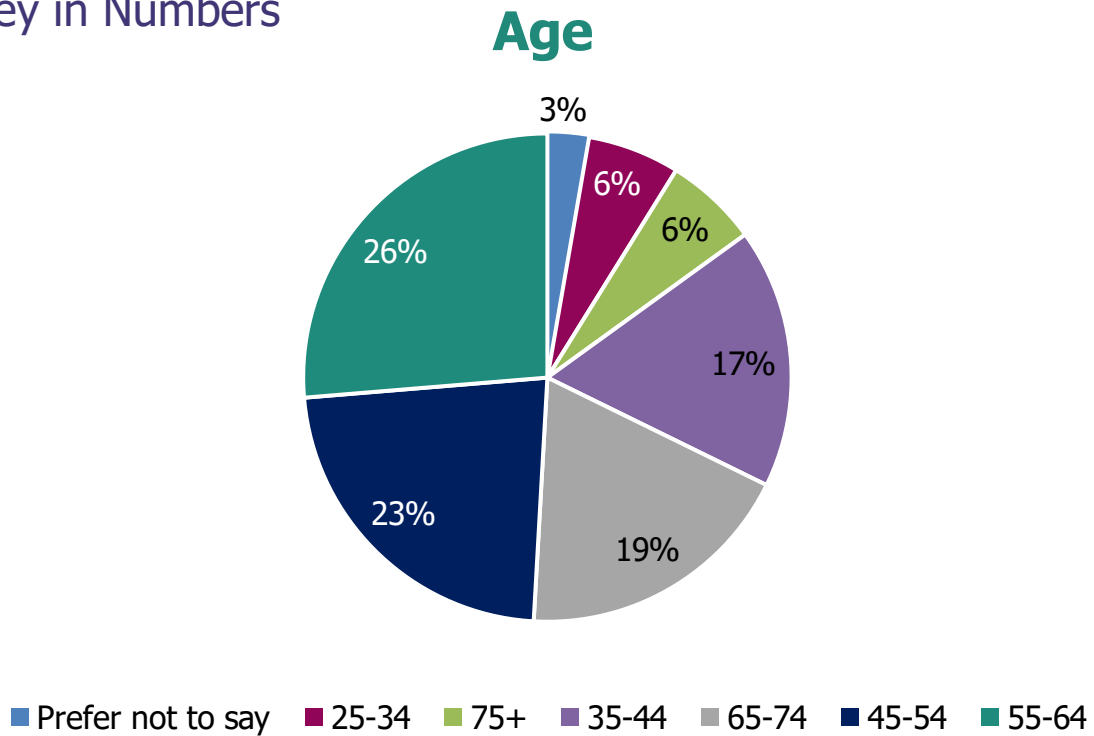
Generally, people recognise the value of co-locating services that are complementary or related in one place. Community activities generally and more specifically Health Services, were both well supported in terms of sitting well with leisure provision, and this sort of co-location will attract people that traditionally may not ever go near either the leisure centre or the other service, so both services can benefit.

Social Activity

62% of responses state that users attend facilities on their own, however the "open comments" do highlight the importance of social interaction as a reason for attending. The importance of creating "social meeting" spaces such as the café & waiting areas, might be something to explore further.

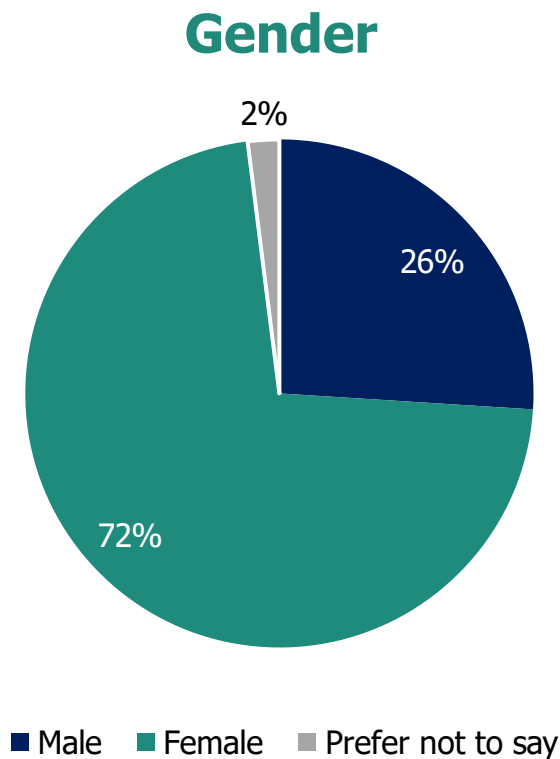
04 Survey Results

The Survey in Numbers

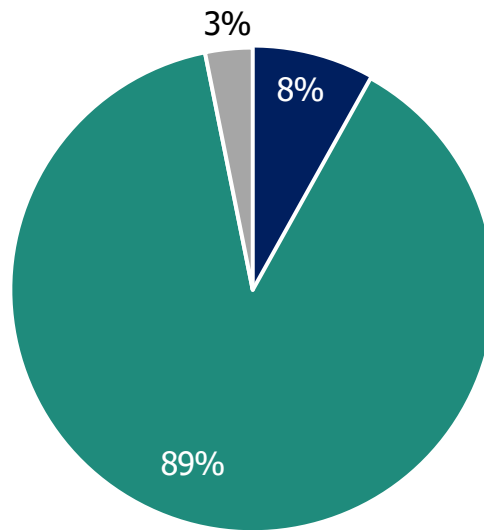


SAMPLE

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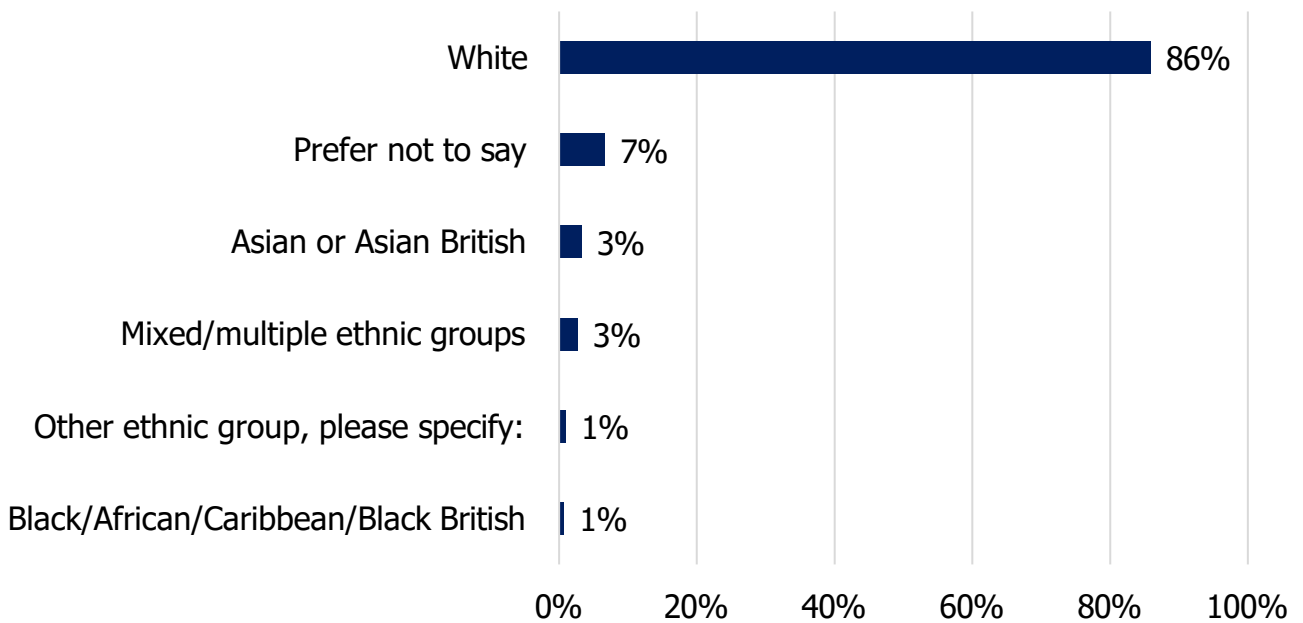


Do you consider yourself to have a disability?

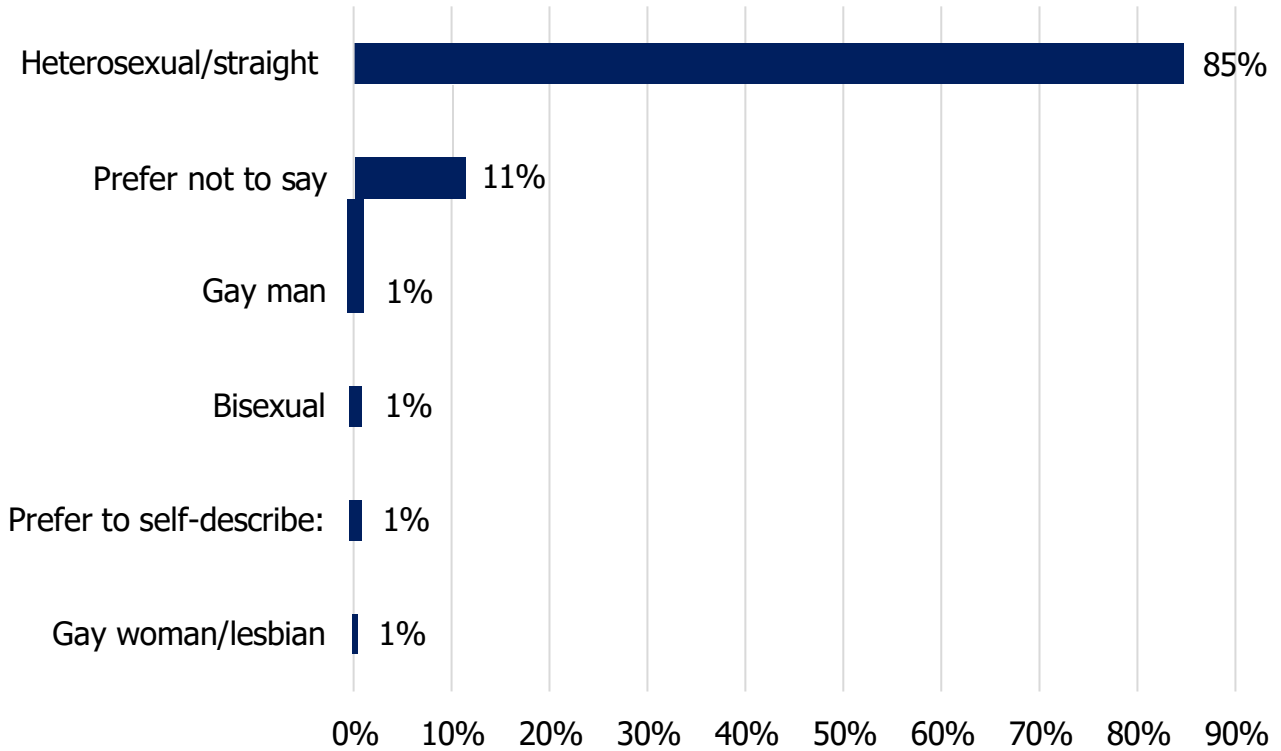


■ Yes ■ No ■ Prefer not to say

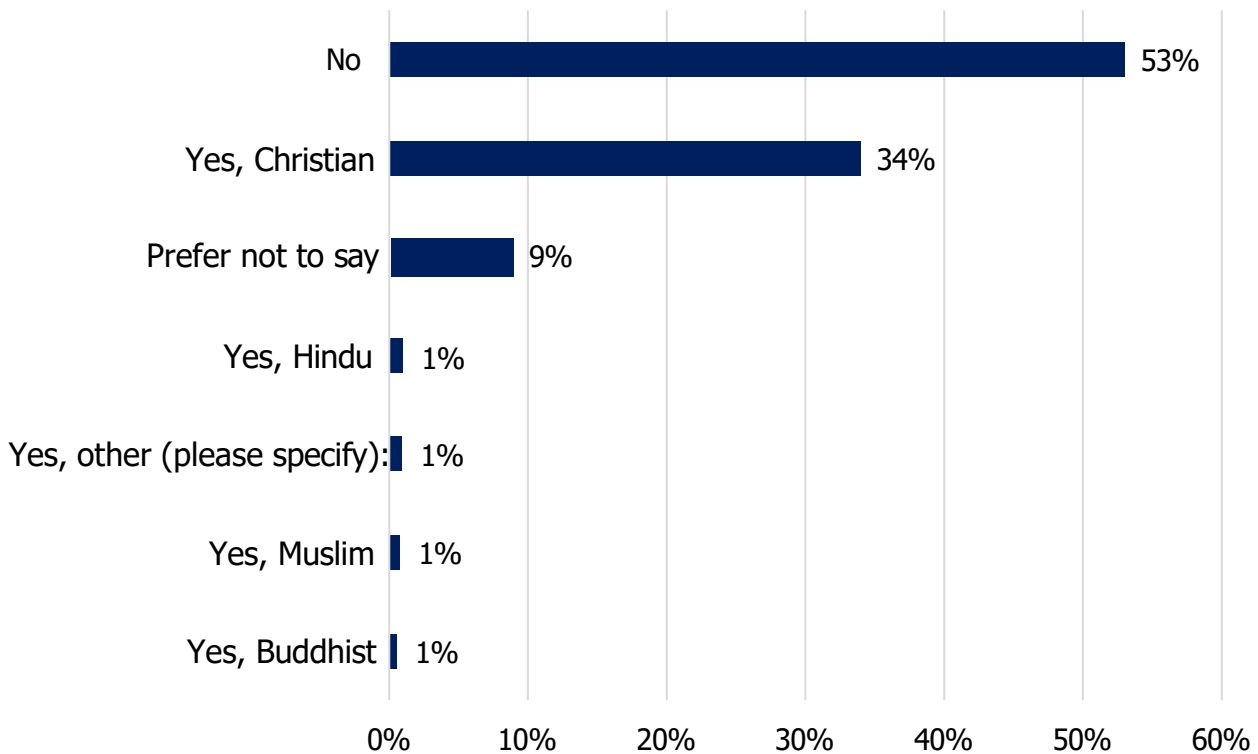
Ethnicity



Sexual Orientation

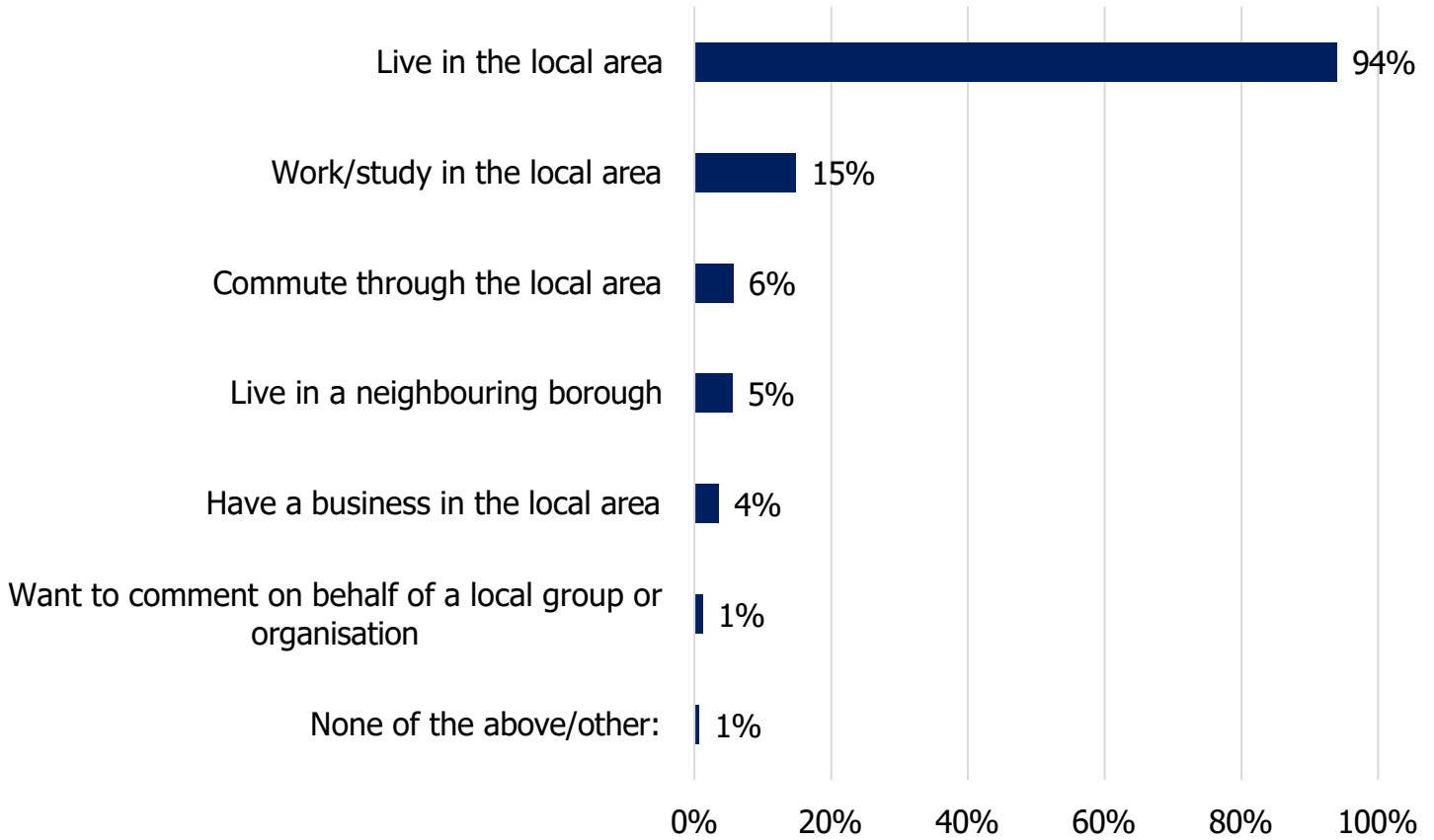


Religion or faith group

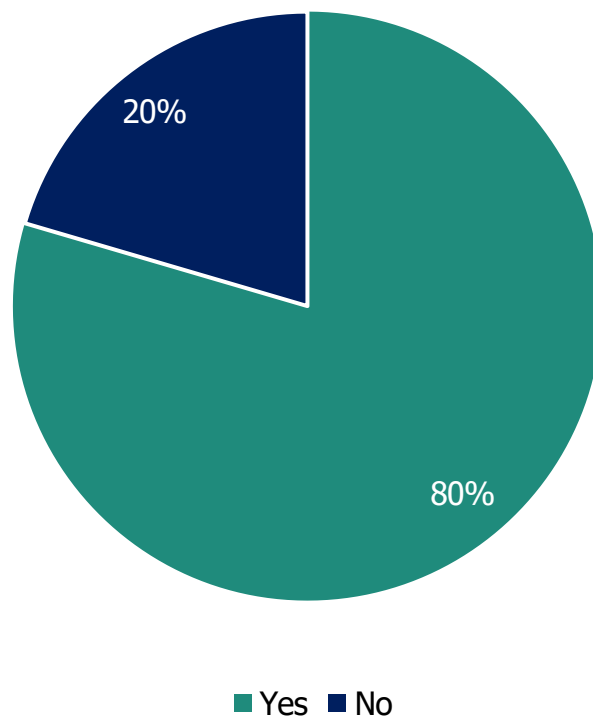


05 Question Breakdown

Do you:

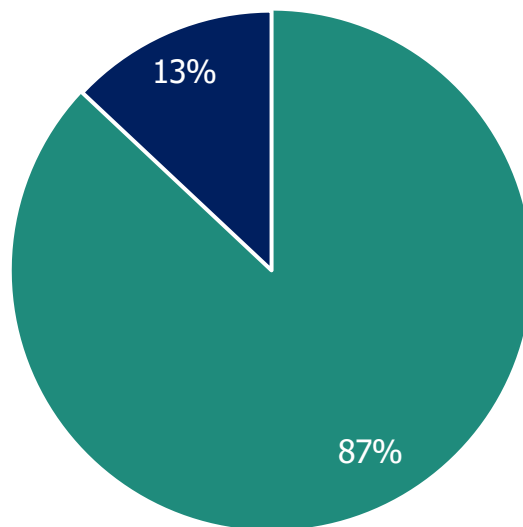


Do you currently use a leisure facility operated by the Council?



80% of respondents said they currently use a leisure facility operated by the Council.

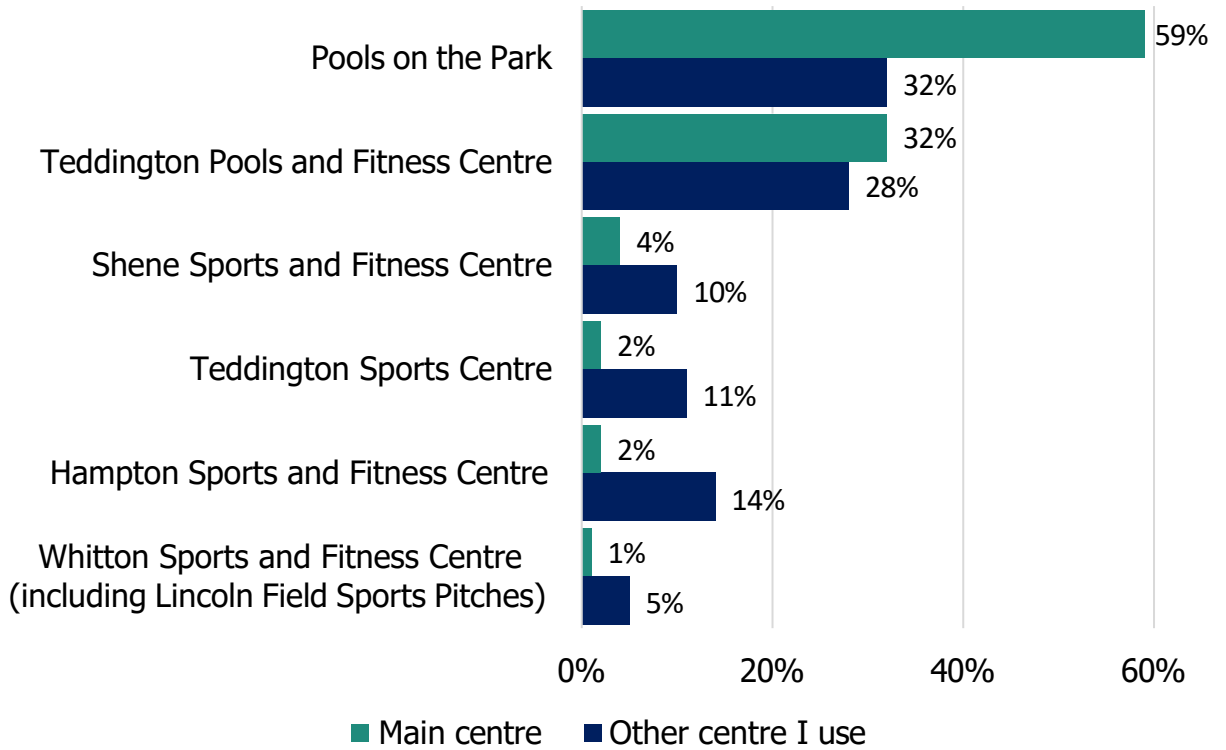
Please select the statement that most applies to you (Non-users of council leisure facilities)



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

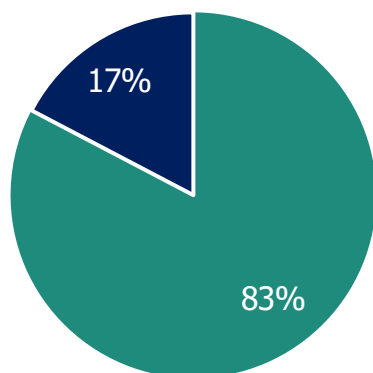
87% of non council leisure centre users (232 people from the sample) said they **exercise but not at a leisure facility operated by the council**. Whereas **13%** (36 people from the sub sample) said they **don't exercise (less than 30 minutes per week)**.

Which centre(s) do you use? (Council leisure centre users only)



677 council leisure centre users said they use 'Pools in the Park' as their main centre.

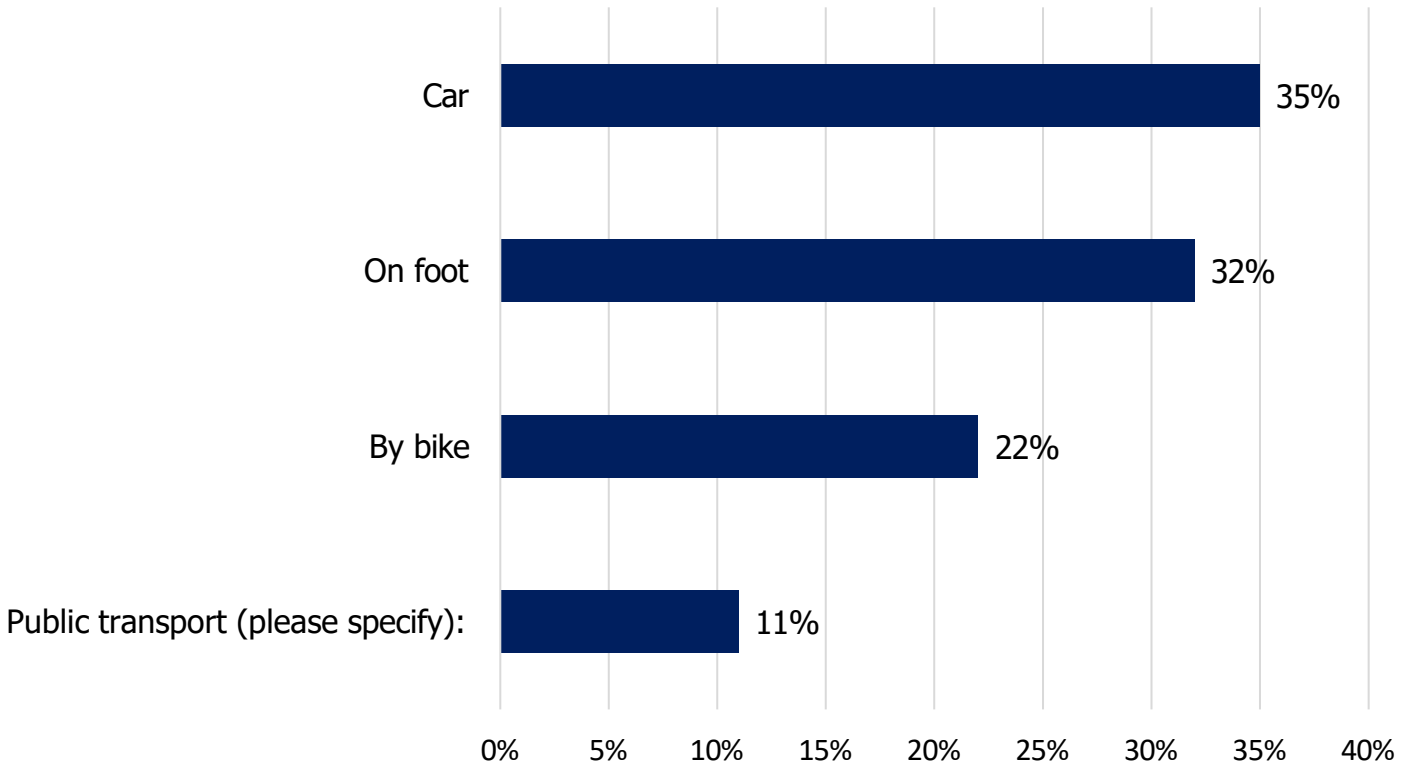
Is this centre the nearest centre to your home?



83% said they use their main centre because it is the nearest to their home.

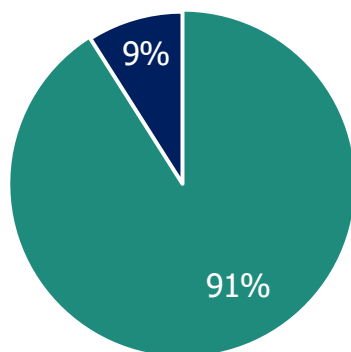
■ Yes ■ No

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



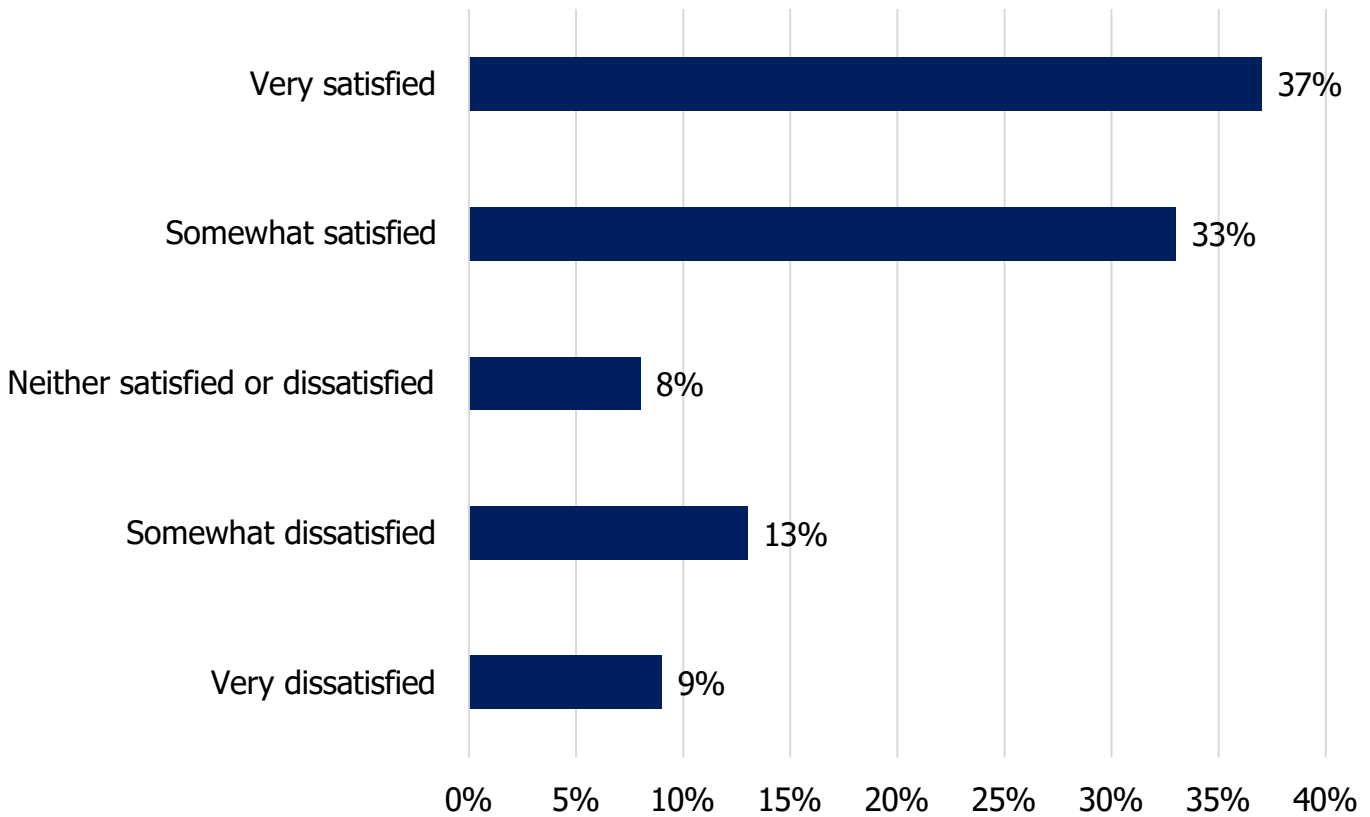
35% of users of centres said their **main method of travel** to their centre was by 'Car' This was closely followed by 'On foot' at **32%**.

Is this your preferred method of travel?



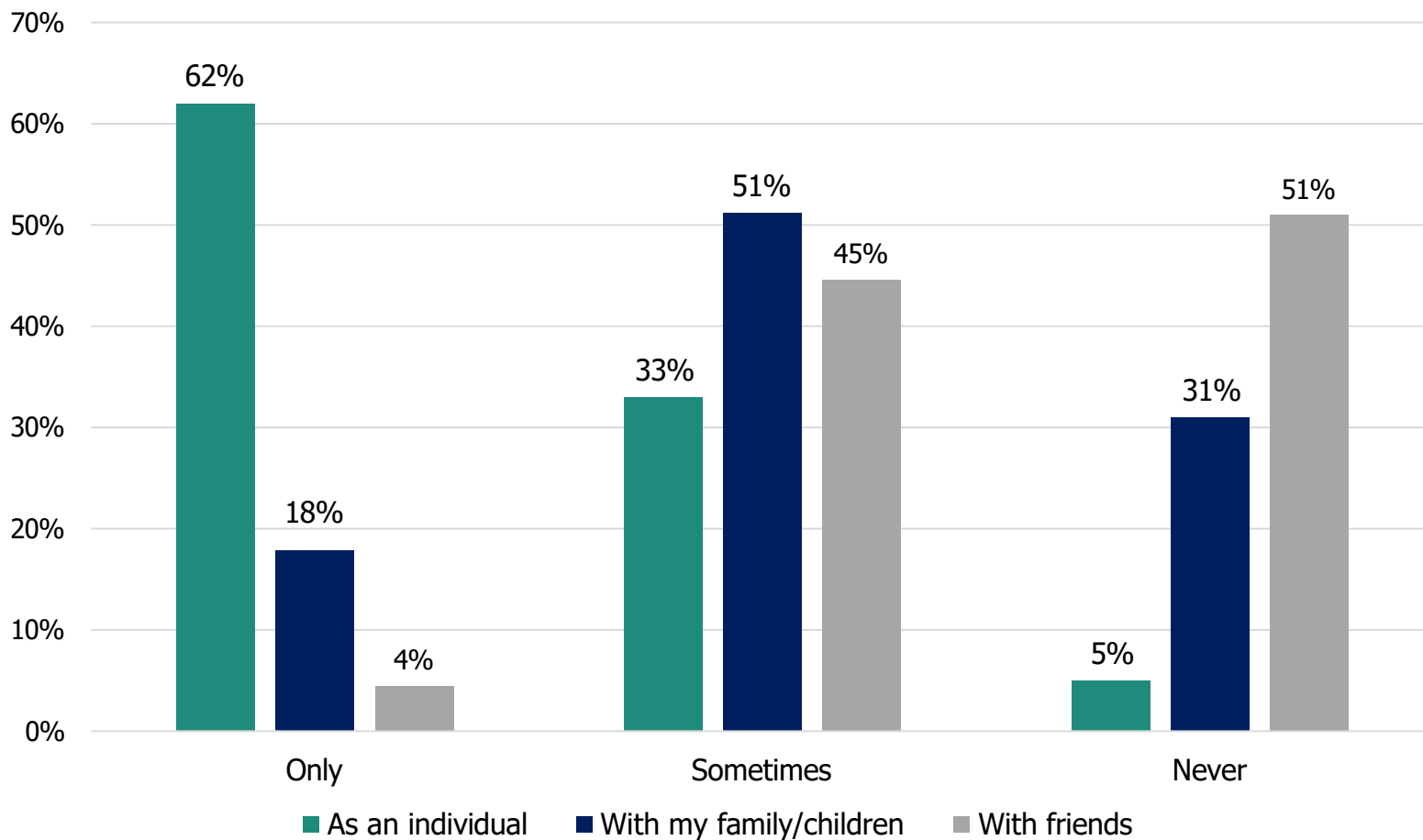
From the answers selected above, **91%** of users said this was their **preferred method of travel**.

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, **70%** of users were 'Very or Somewhat Satisfied' with their overall experience.

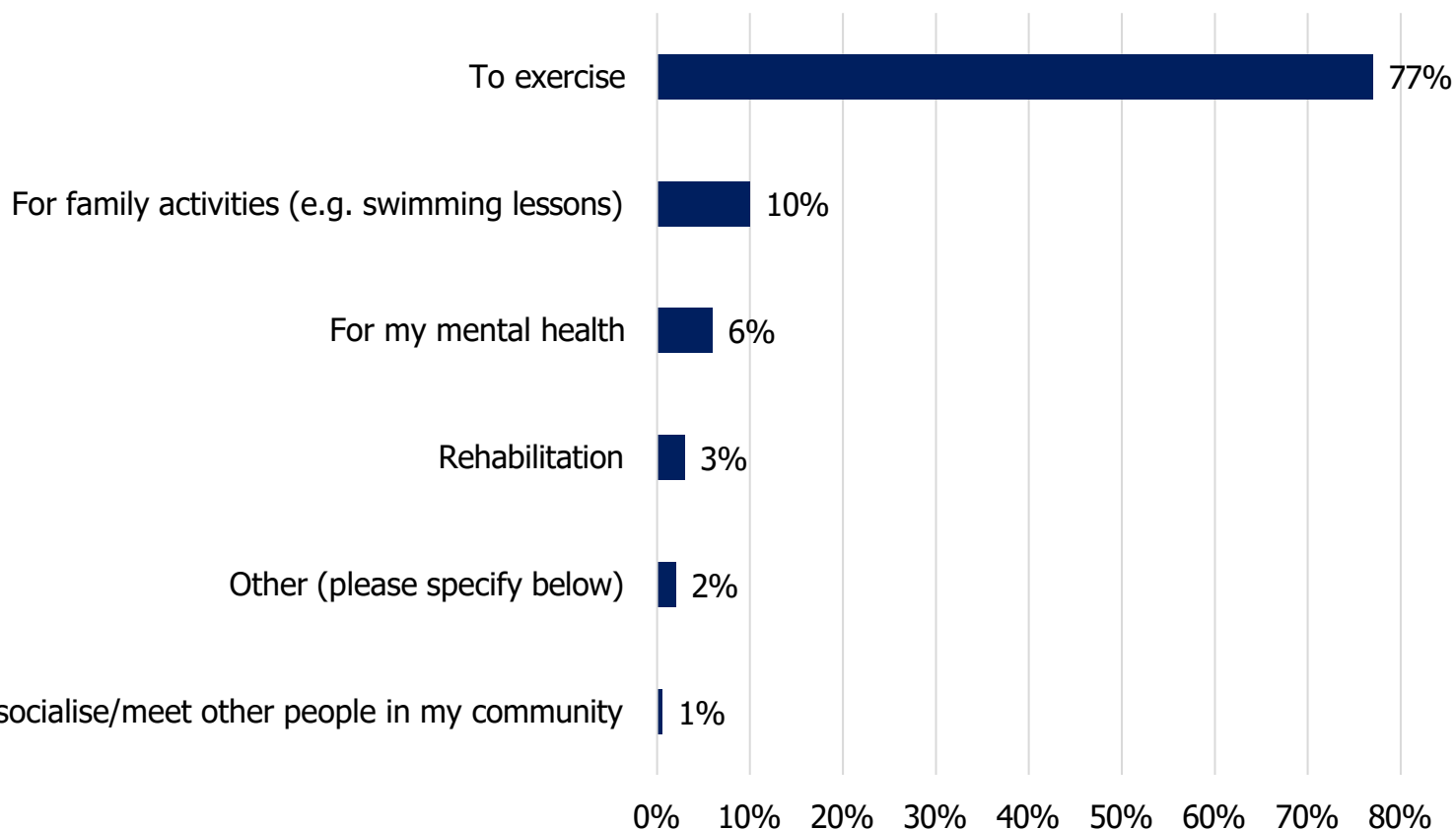
Do you usually use the leisure centre as an individual or do you attend with others?



62% of users stated they **only** ever use the leisure centre 'As an individual' with just **4%** stating they **only** use it 'With friends'.

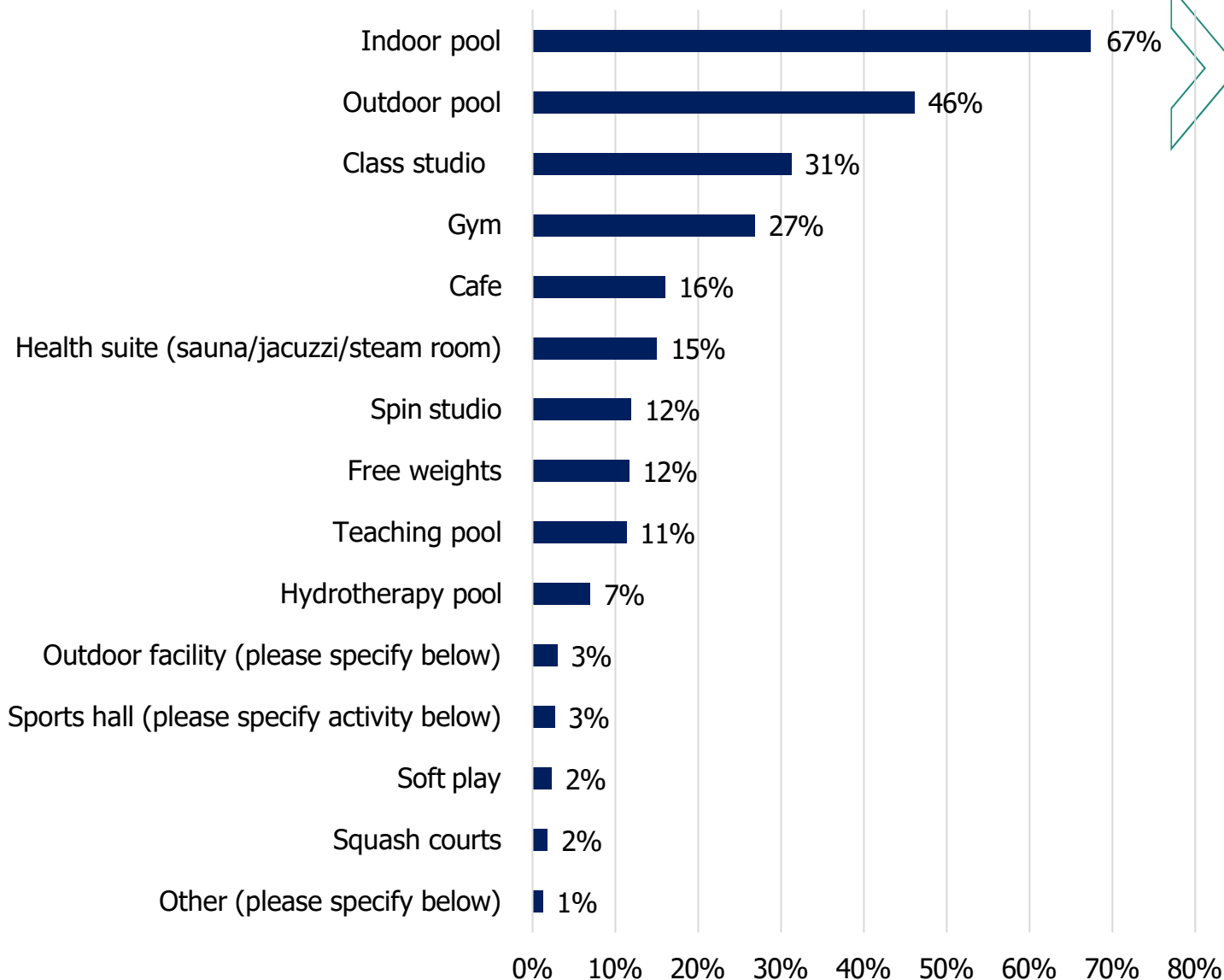
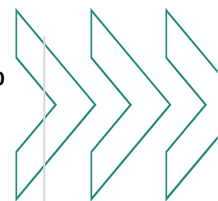
Over half (**51%**) 'Sometimes' use the leisure centre 'With their family/children'.

What is the main reason you visit the leisure centre?



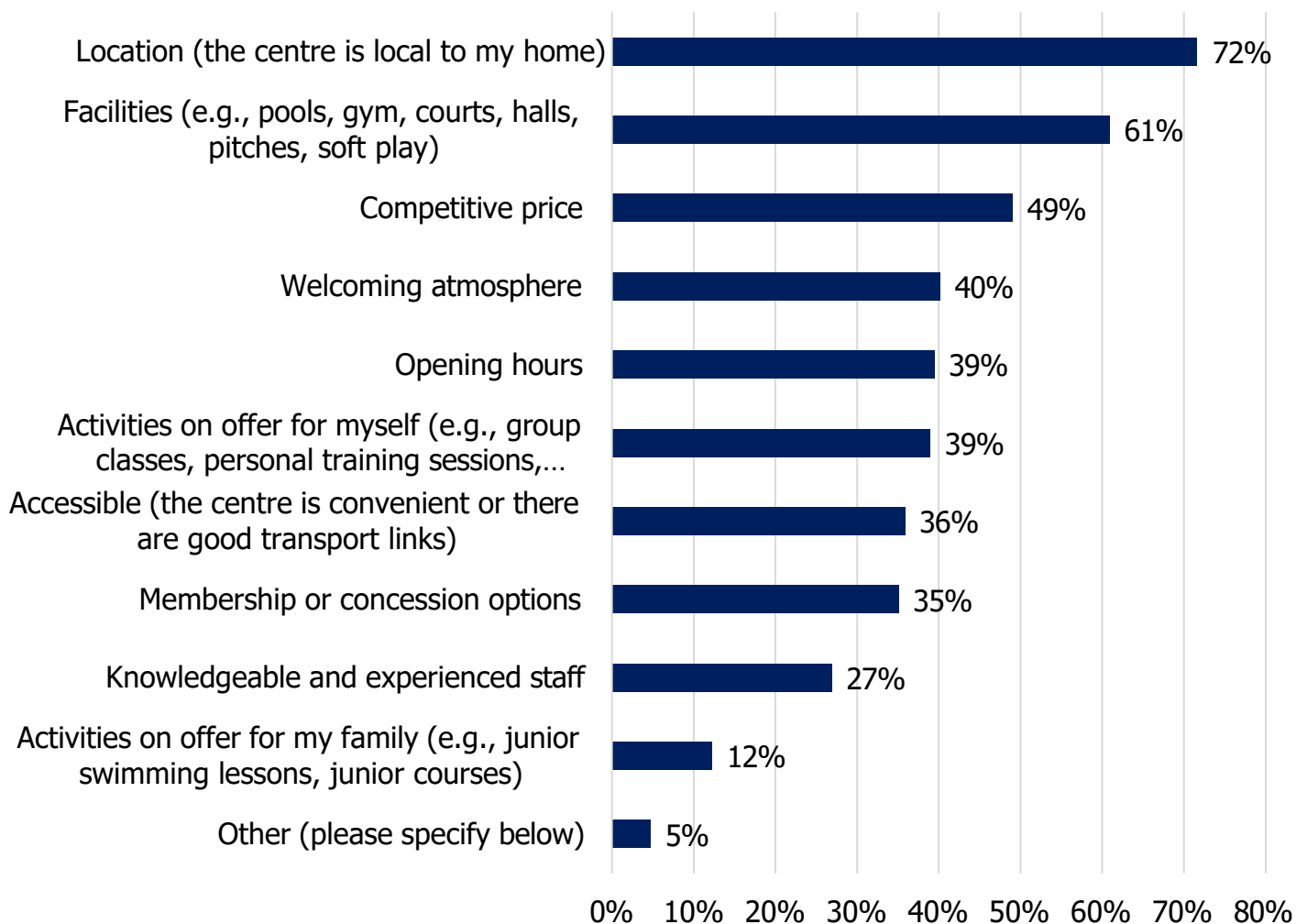
77% said the main reason they visited the leisure centre was 'To exercise' followed by **10%** who visited for 'Family activities (e.g. swimming lessons)'.

Which facilities are most important to you?



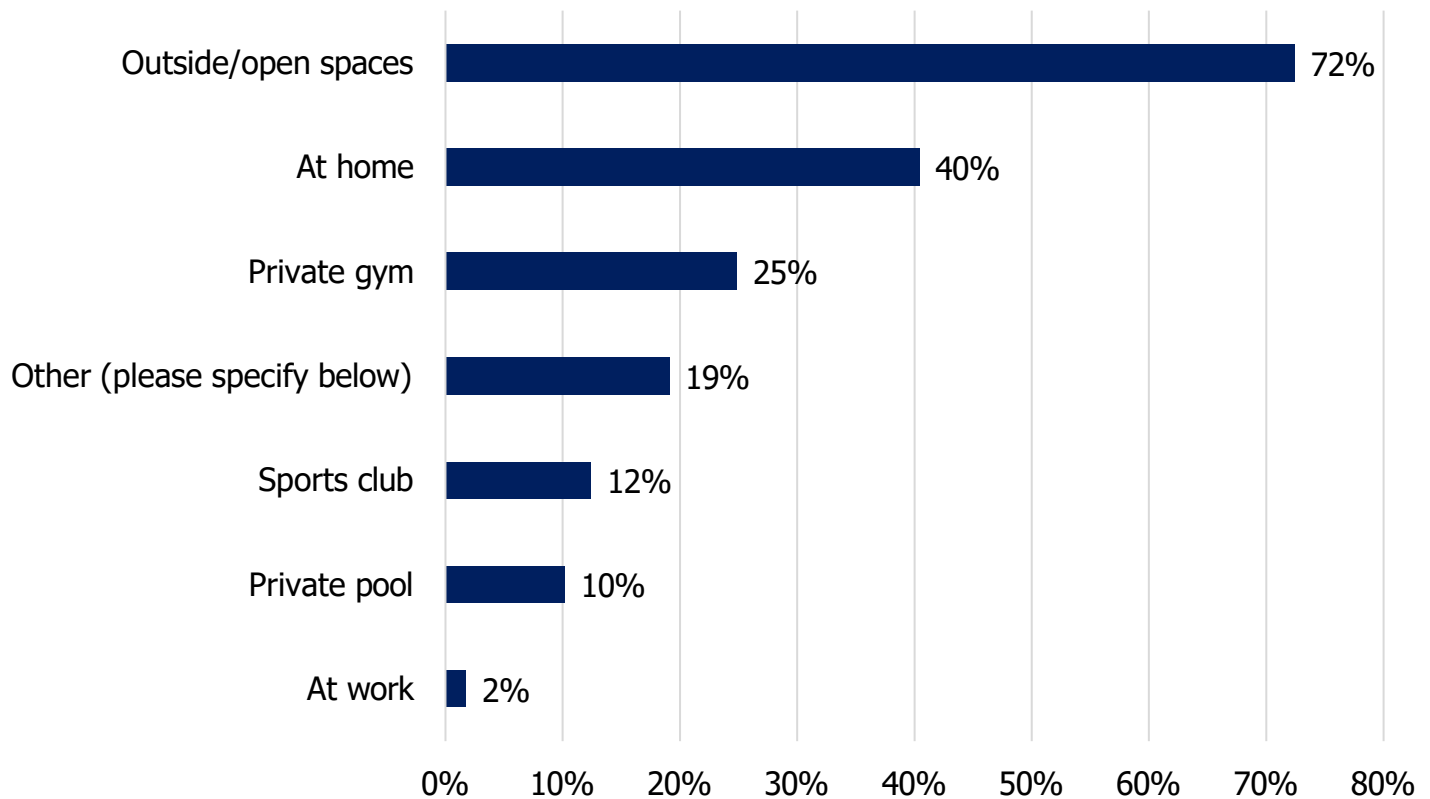
Use of the **Indoor Pool** was the facility that was rated as **Most important** by **67%** of users.

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



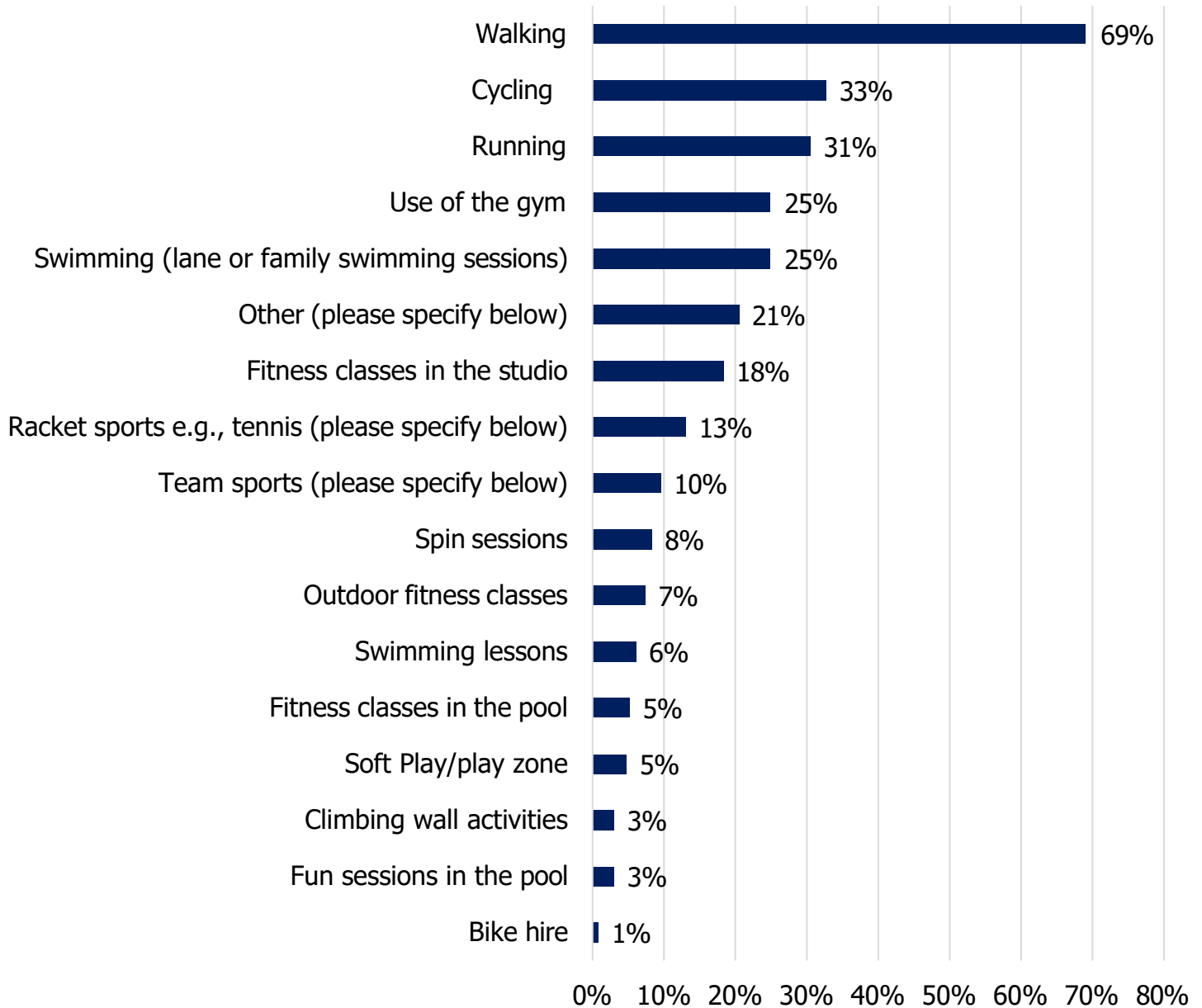
72% said the thing they liked the most about the centre they were using was the 'Location' followed by **61%** who said they liked the 'Facilities (e.g., pools, gym, courts, halls, pitches, soft play)'.

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



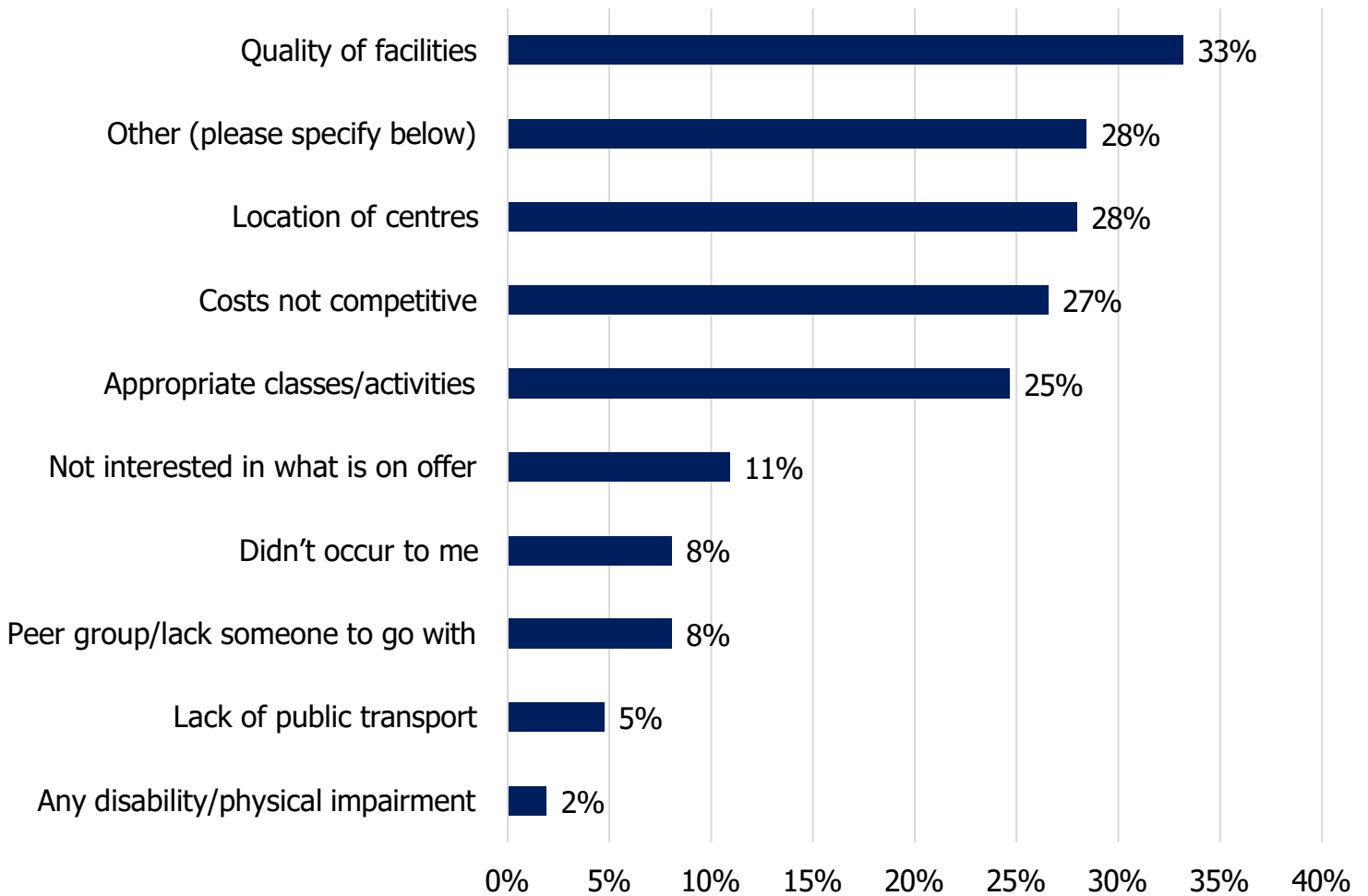
'Outside/open spaces' was the most popular place chosen by non-users when asked where they currently exercise.

Which of the below do you currently do?



When **non-users** were asked what **exercise/activity** they currently do, **69%** stated 'Walking'.

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

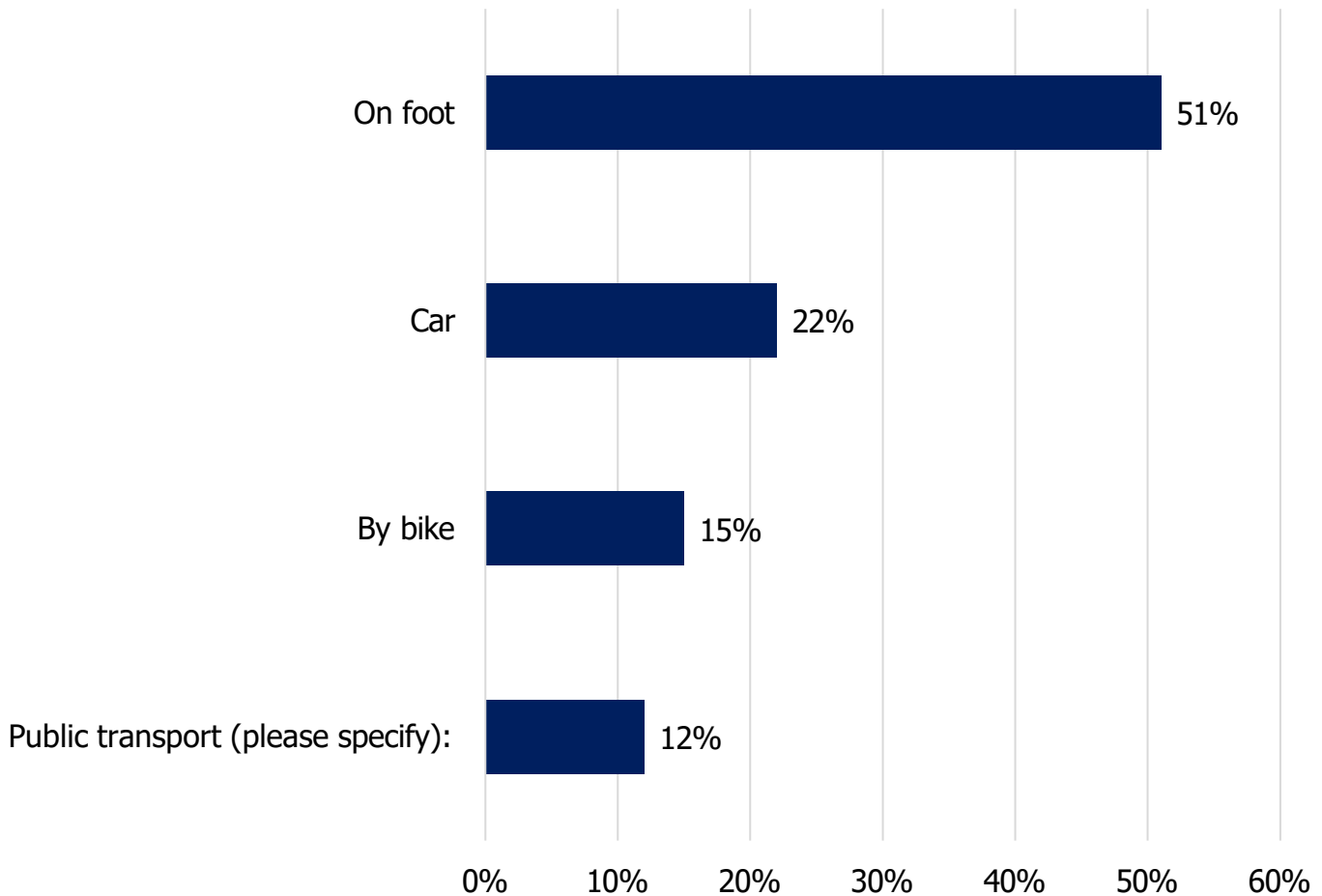


'Quality of facilities' was commonly selected as the main reason that non-users do not use a public leisure centre.

Other (please specify) - Top 4 trends:

- Cost
- Too busy
- Activity times
- Booking system

How do you currently travel to where you exercise?



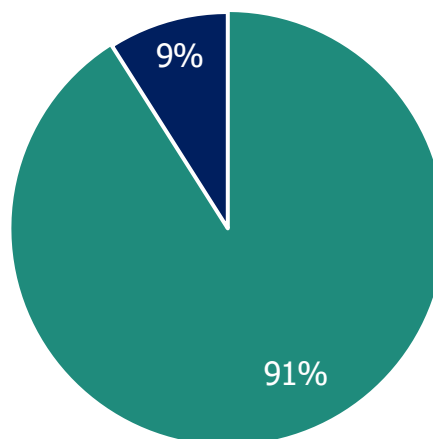
Over half of the non-users (**53%**) currently travel 'On foot' to where they exercise.

Public transport - Top 3 trends

- Bus
- Tube
- Train

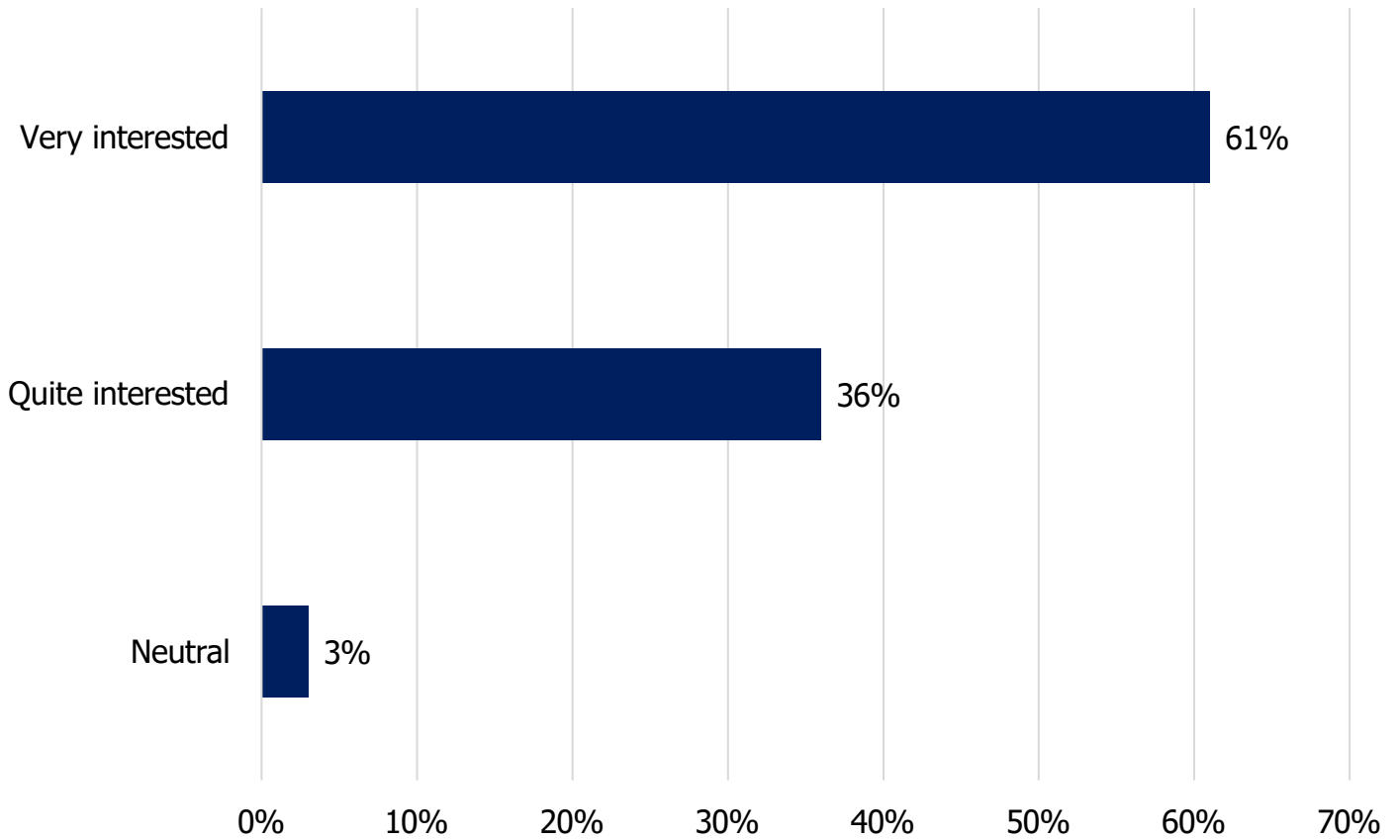
Is this your preferred method of travel?

From the answers selected above, **91%** of non-users said this was their preferred method of travel.



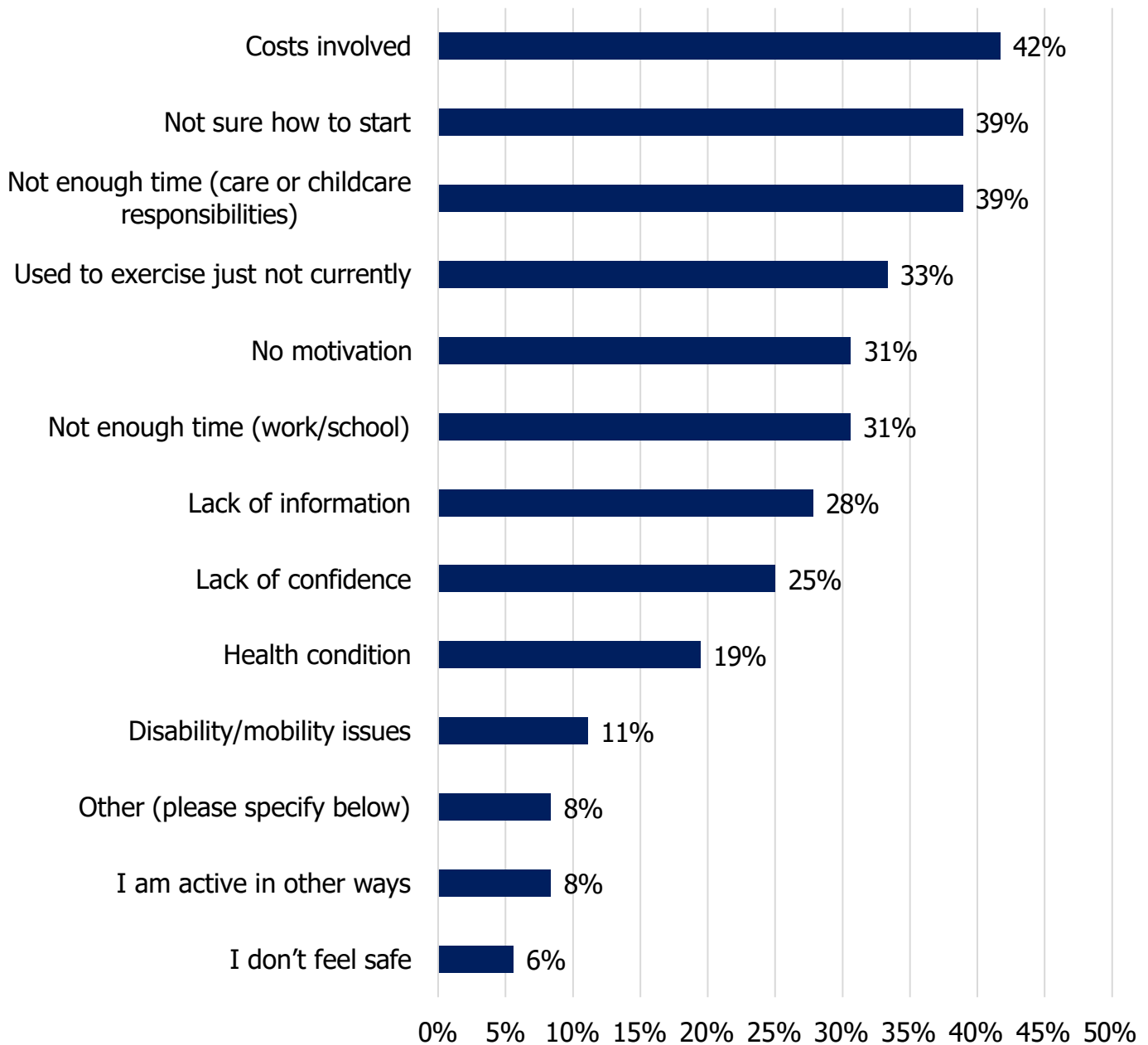
■ Yes ■ No

How interested are you in getting more active?



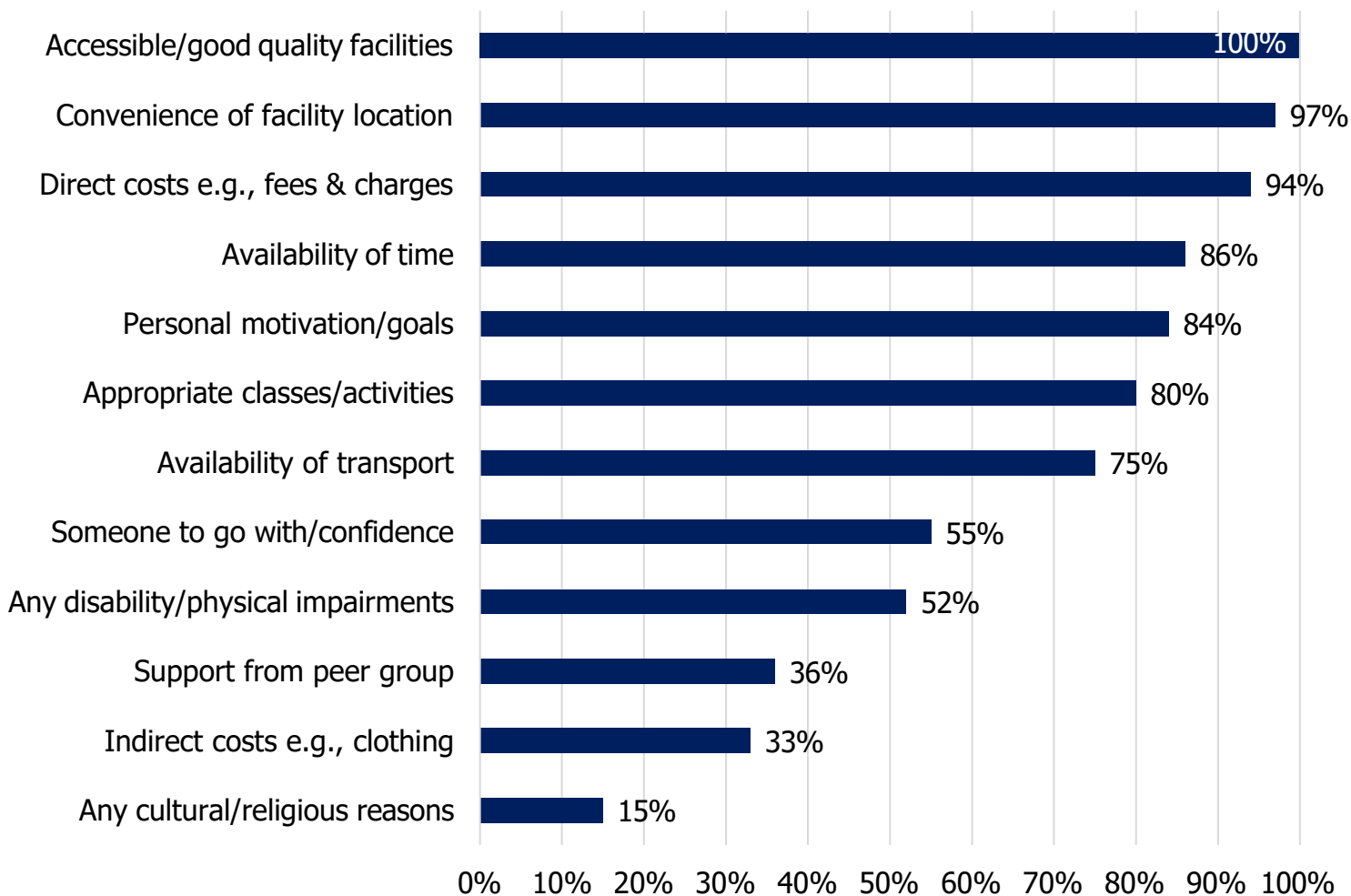
Of the 36 respondents who stated 'I don't exercise (i.e. did less than 30 minutes per week)', **97%** said they were 'Interested' in getting more active.

What are the main reasons you are currently not exercising?



'Costs involved' was the biggest factor preventing them from exercising. This was closely followed by 'Not sure how to start' and 'Not enough time due to care or childcare responsibilities'.

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

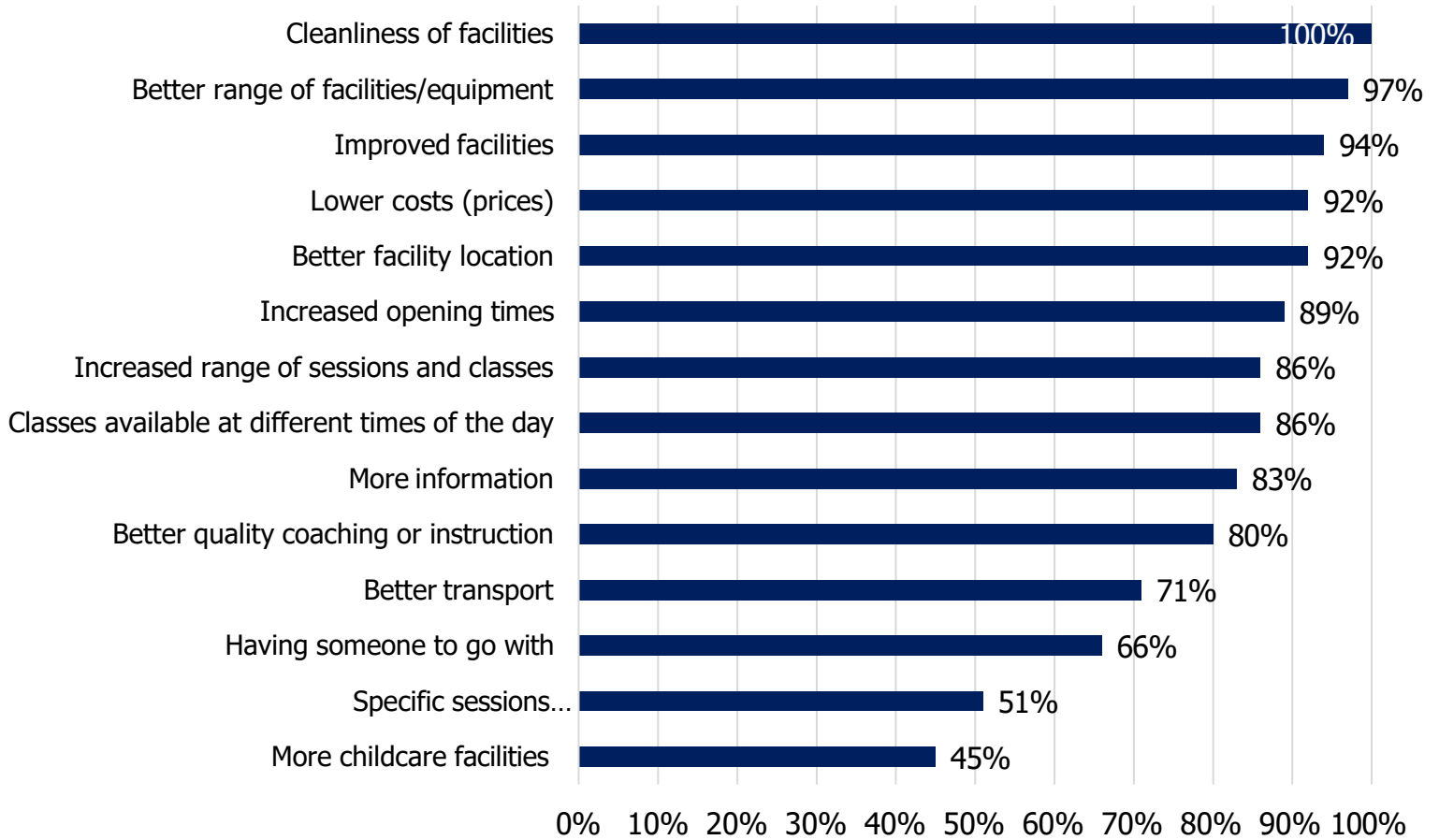


Accessible/good quality facilities, was the most important factor when thinking about doing more physical activity or exercise.

How important are the following when you think about doing more physical activity/exercise? (Very important and Quite important %)	Richmond upon Thames	Benchmark
Any cultural/religious reasons	15%	5%
Indirect costs e.g., clothing	33%	32%
Support from peer group	36%	46%
Any disability/physical impairments	52%	28%
Someone to go with/confidence	55%	
Availability of transport	75%	37%
Appropriate classes/activities	80%	67%
Personal motivation/goals	84%	78%
Availability of time	86%	75%
Direct costs e.g., fees & charges	94%	71%
Convenience of facility location	97%	
Accessible/good quality facilities	100%	84%

Richmond upon Thames Report 2023

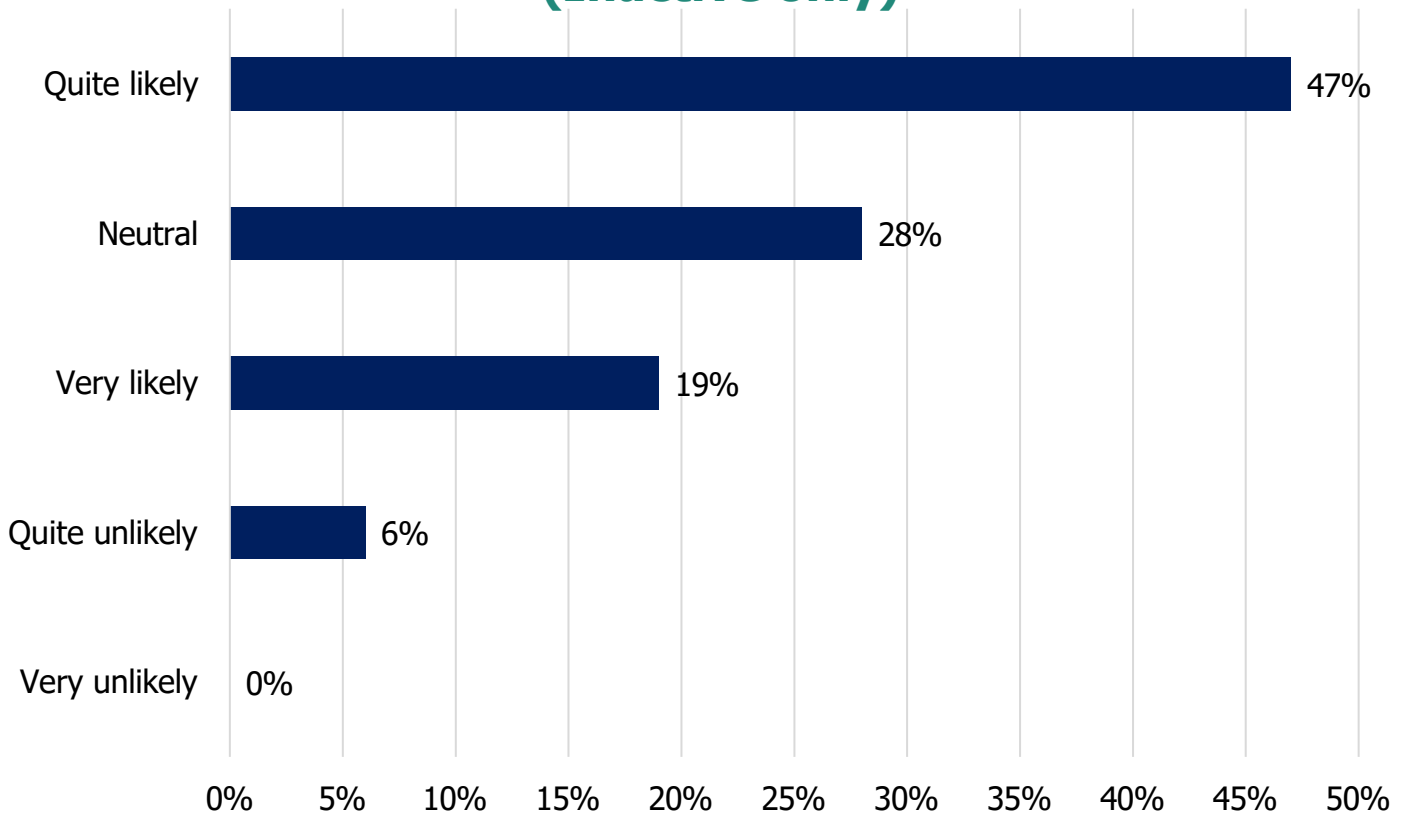
To what extent would the following things encourage you start doing more physical activity/exercise? (Somewhat and Very much %)



'Cleanliness of facilities' was the main factor that would encourage people to participate in more physical activity or exercise.

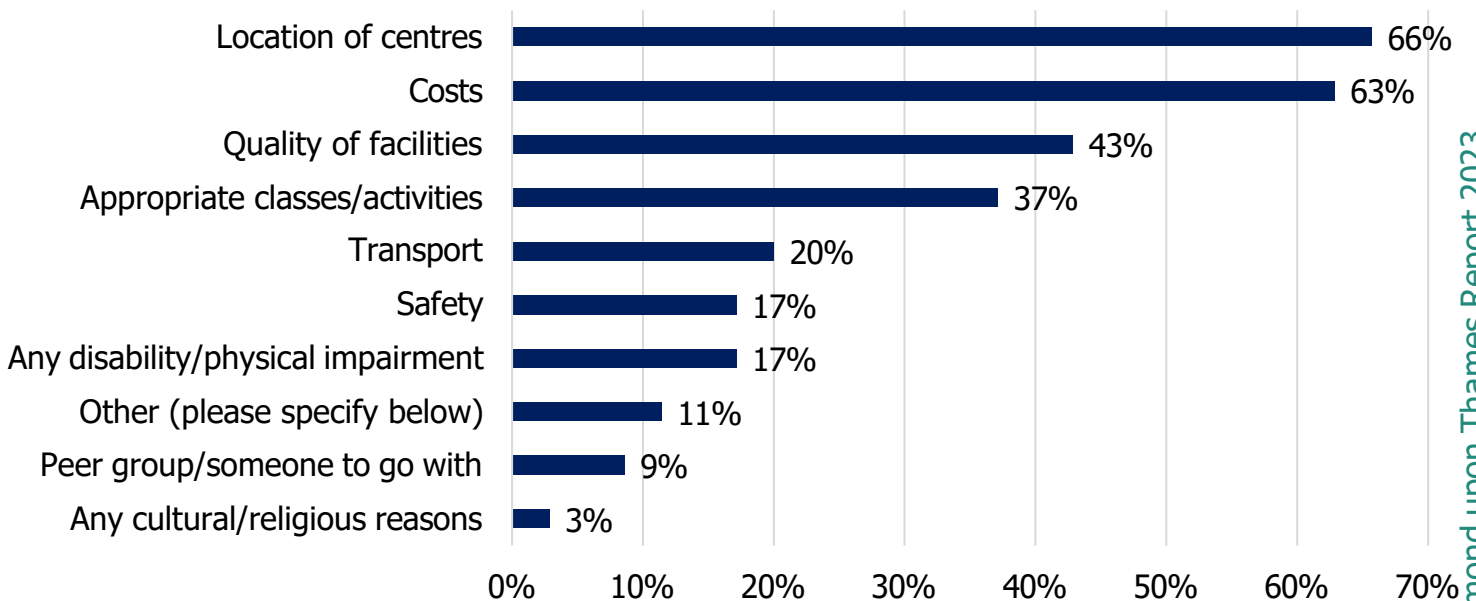
To what extent would the following things encourage you start doing more physical activity/exercise?	Richmond upon Thames (Somewhat & Very much)	Benchmark (Encourage & Strongly encourage)
Better facility location	92%	
Better quality coaching or instruction	80%	
Better range of facilities/equipment	97%	84%
Better transport	71%	49%
Classes available at different times of the day	86%	82%
Cleanliness of facilities	100%	86%
Having someone to go with	66%	
Improved facilities	94%	86%
Increased opening times	89%	76%
Increased range of sessions and classes	86%	77%
Lower costs (prices)	92%	86%
More childcare facilities	45%	28%
More information	83%	67%
Specific sessions (Quiet/Disability/LGBT/Women/Family Friendly)	51%	44%

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



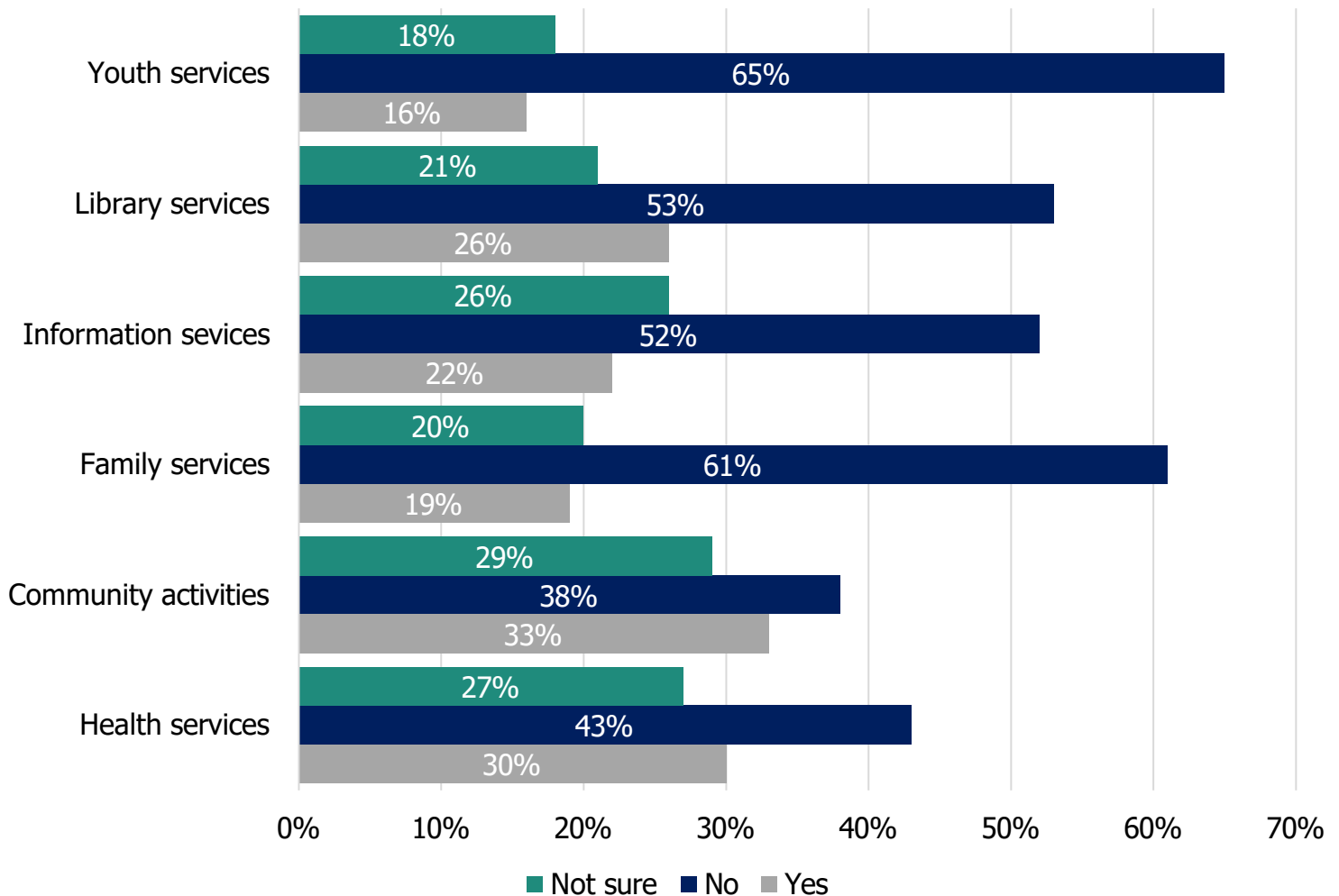
Nearly half (**47%**) said they would be quite likely to join a leisure centre if they were to start exercising.

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



66% said they chose the answer above because of the location of the centres.

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



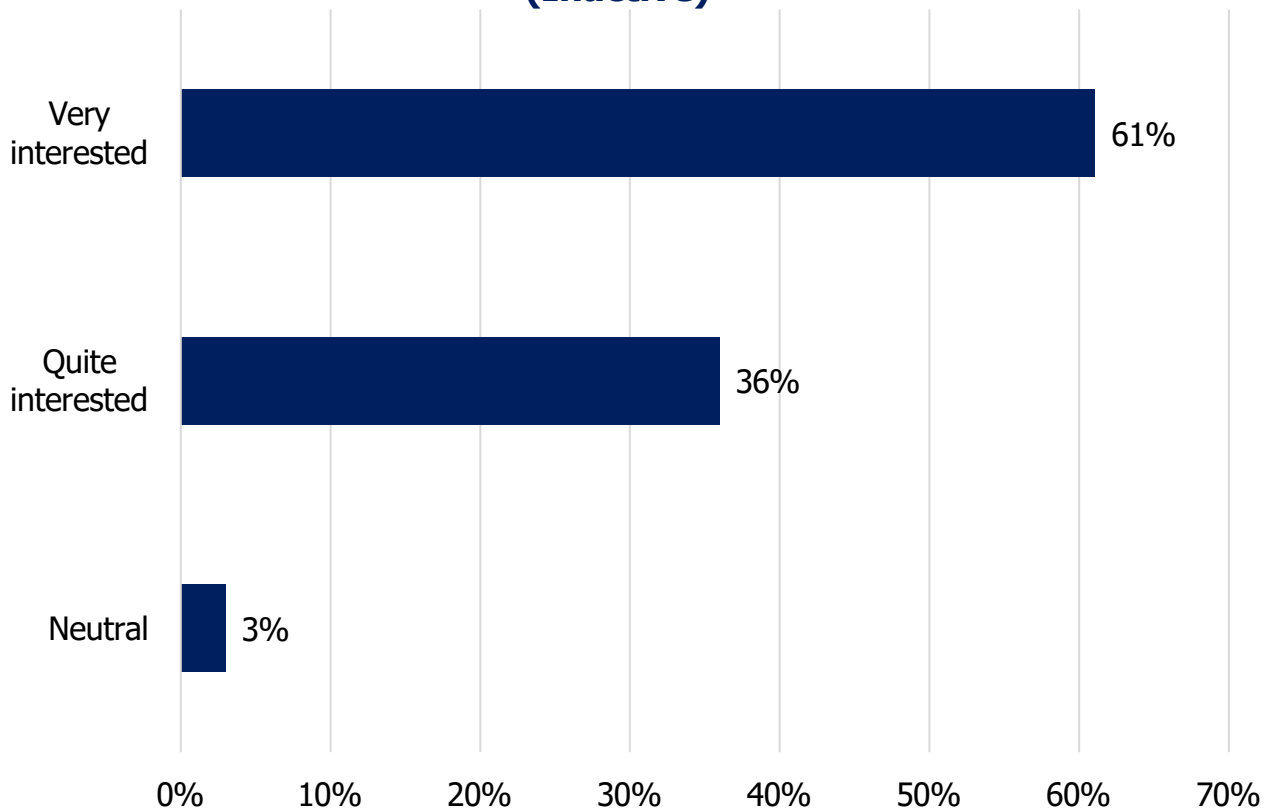
'Community activities' was the facility most likely to attract new users if they were on the same site as the leisure centre, with **33%** of the total sample saying 'Yes' to it encouraging them to use it more. This was closely followed by 'Health services' at **30%**.

06 Further Analysis

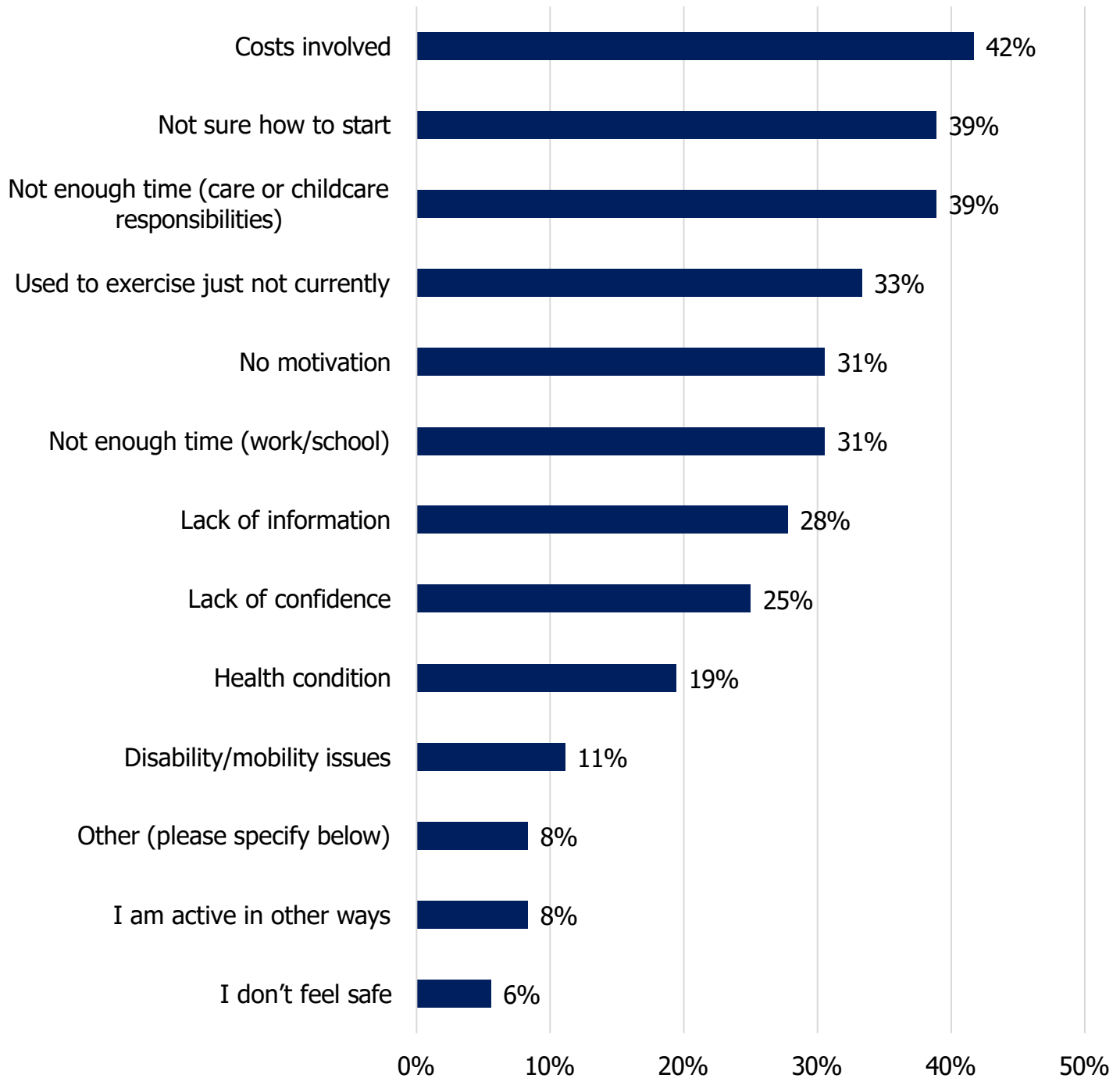
Breakdown by those that are 'inactive'

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 - 36**

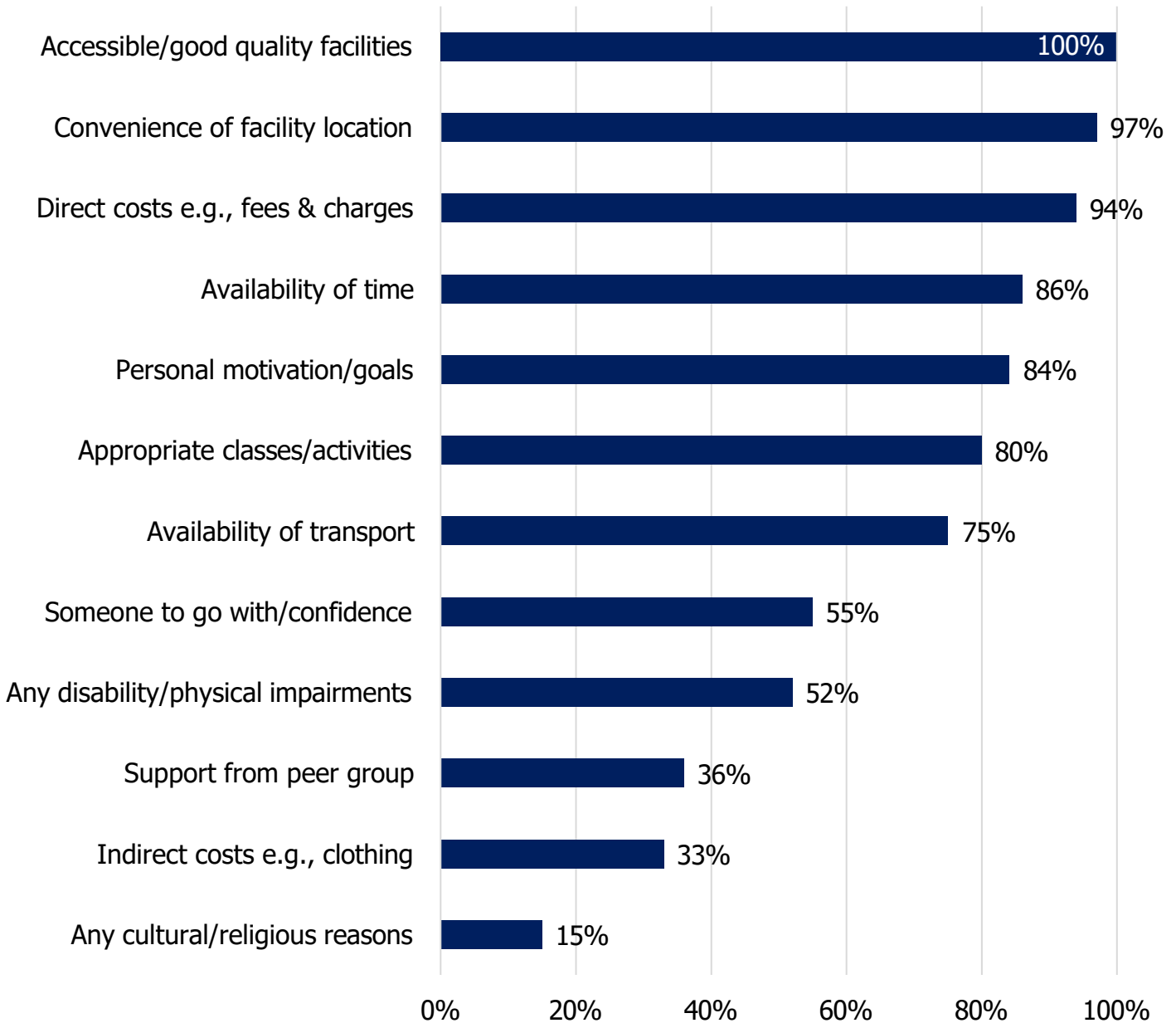
How interested are you in getting more active? (Inactive)



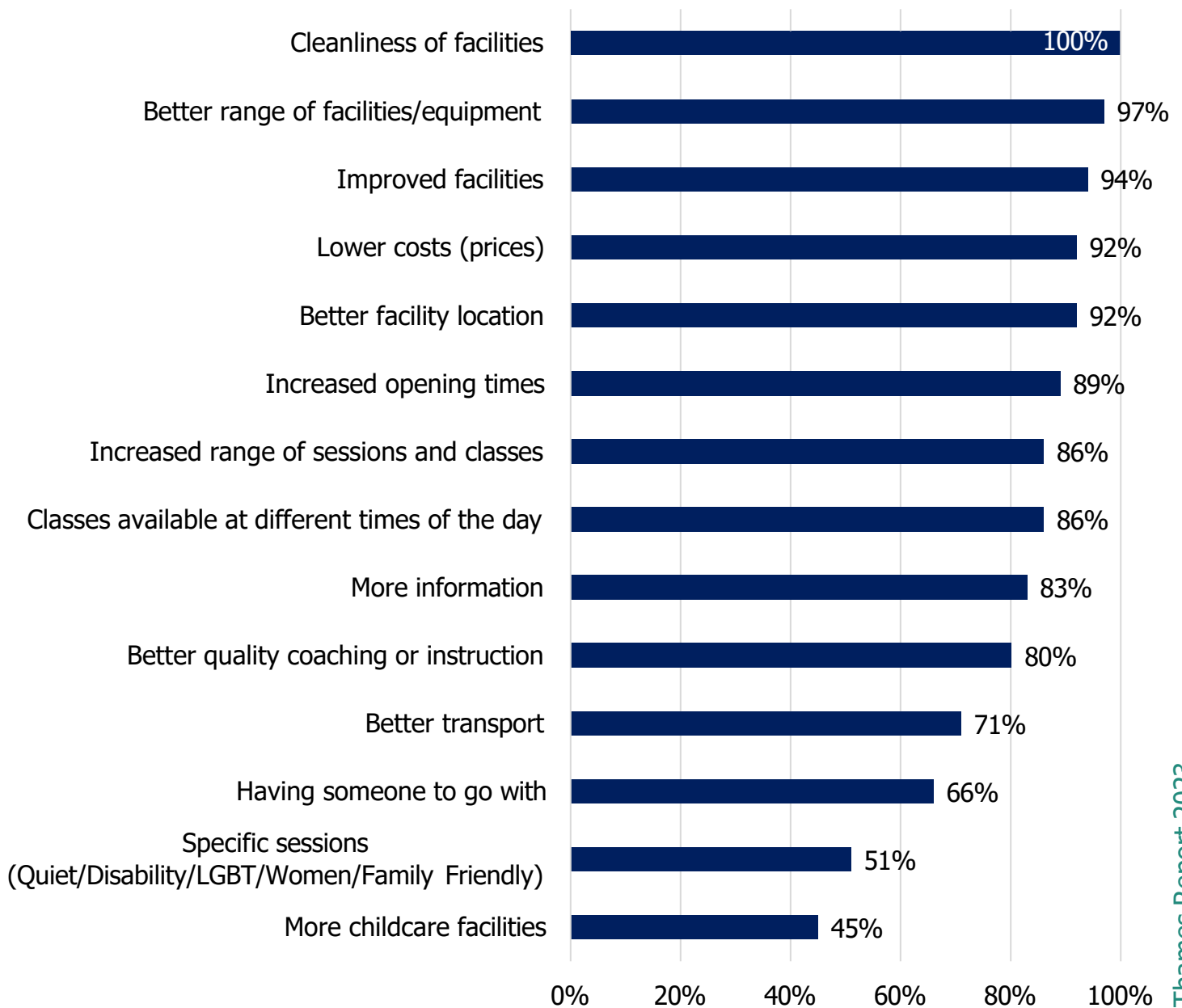
What are the main reasons you are currently not exercising? (Inactive)



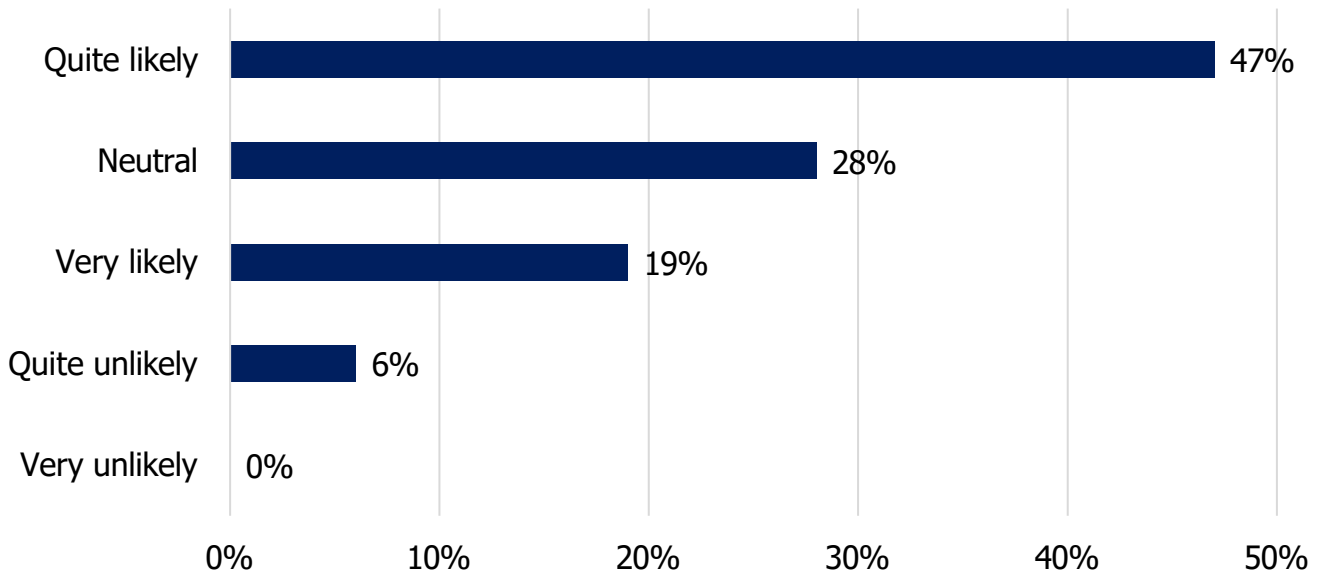
How important are the following when you think about doing more physical activity/exercise? (Very important and Quite important %) (Inactive)



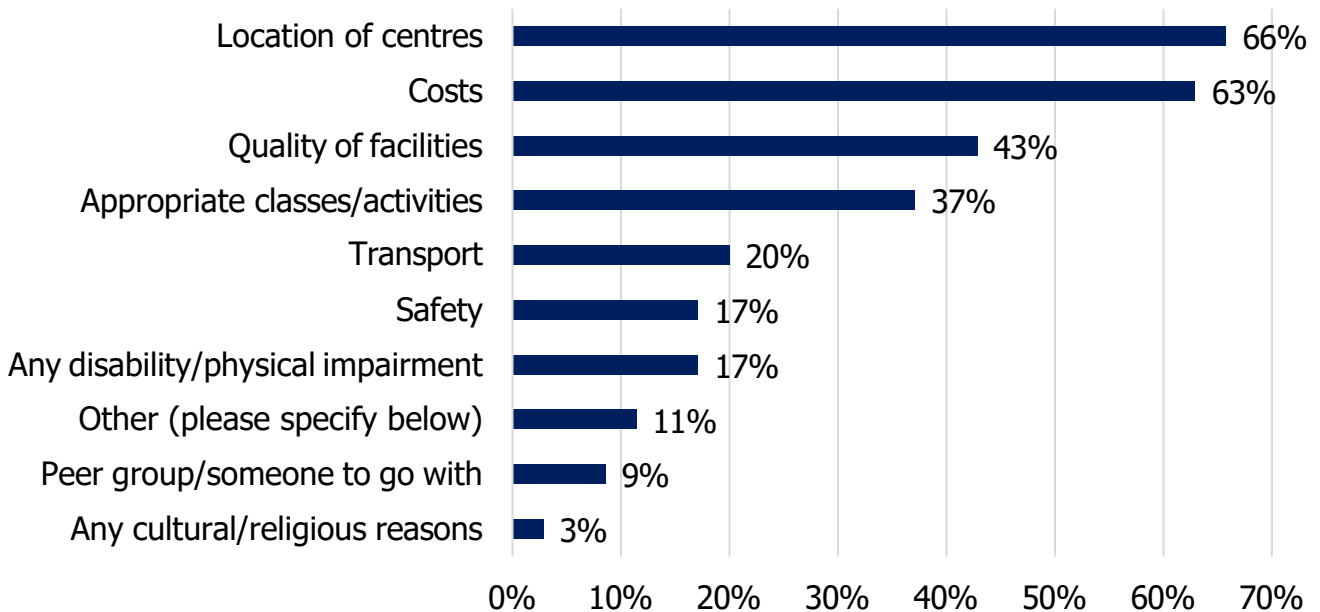
To what extent would the following things encourage you start doing more physical activity/exercise? (Somewhat and Very much %) (Inactive)



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



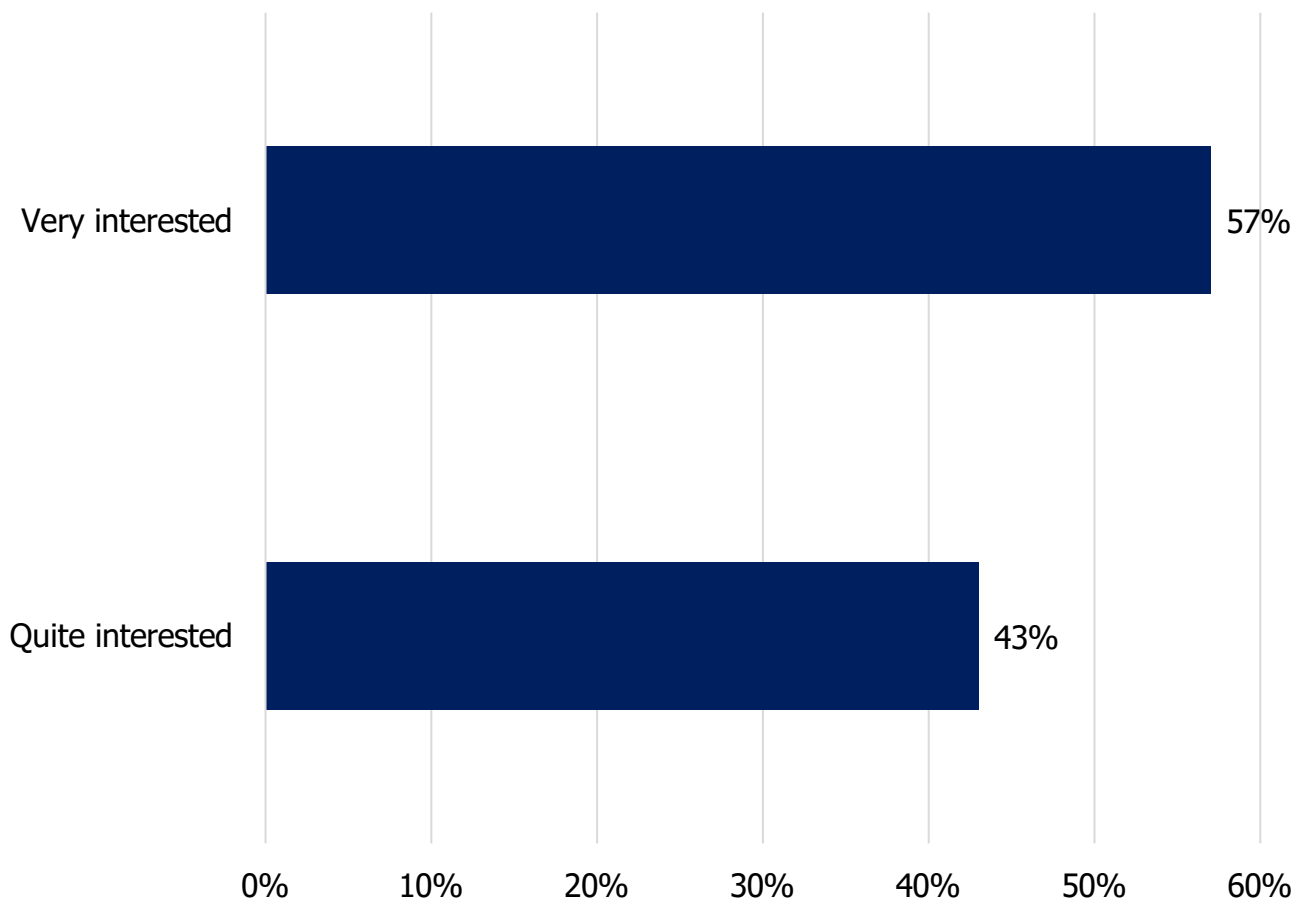
Please tell us the reason for your answer to the previous question (Inactive)



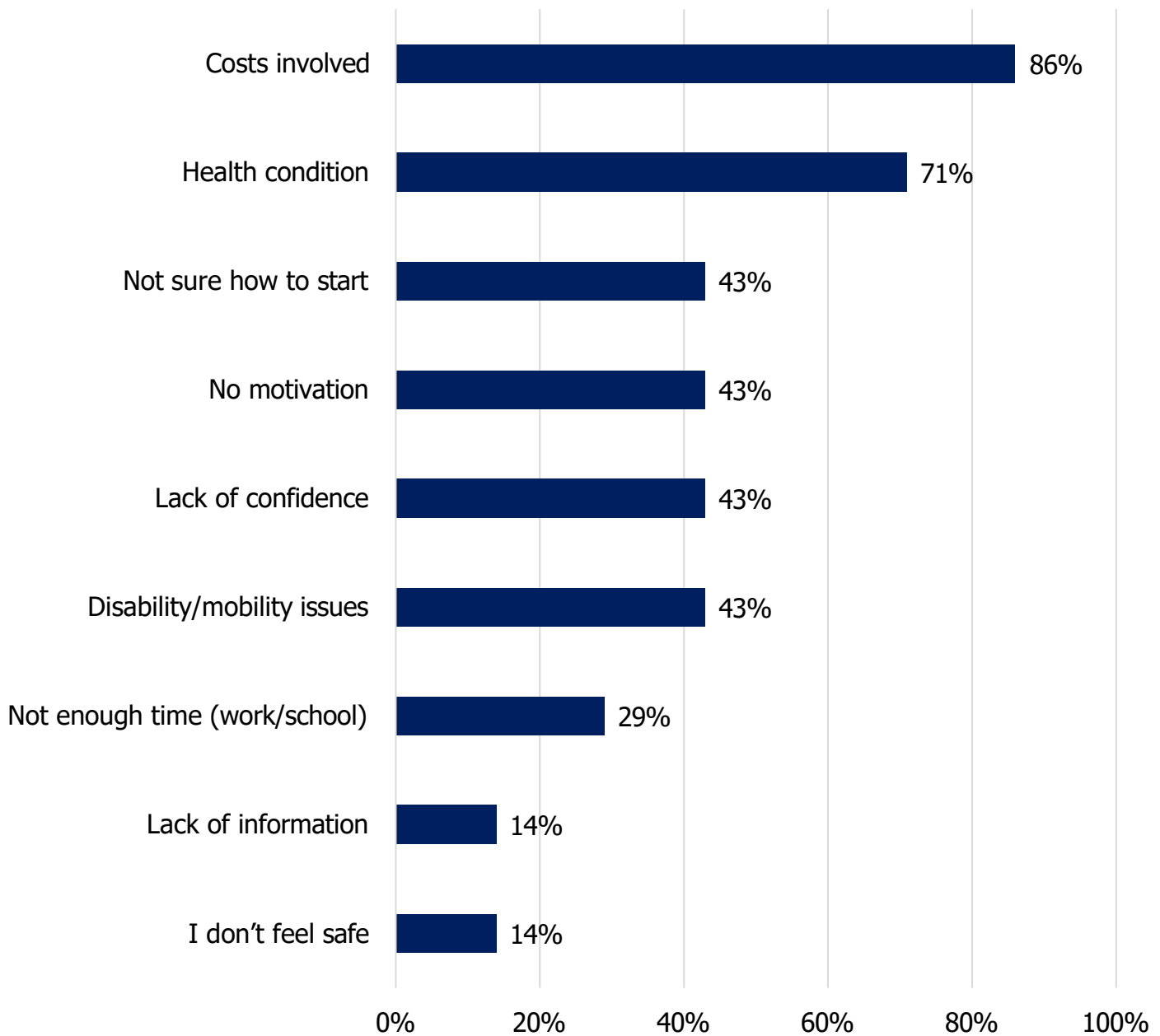
Breakdown by those who consider themselves to have a disability

For those people who selected 'Yes' to the following question 'Do you consider yourself to have a disability?' **Sample – 7**

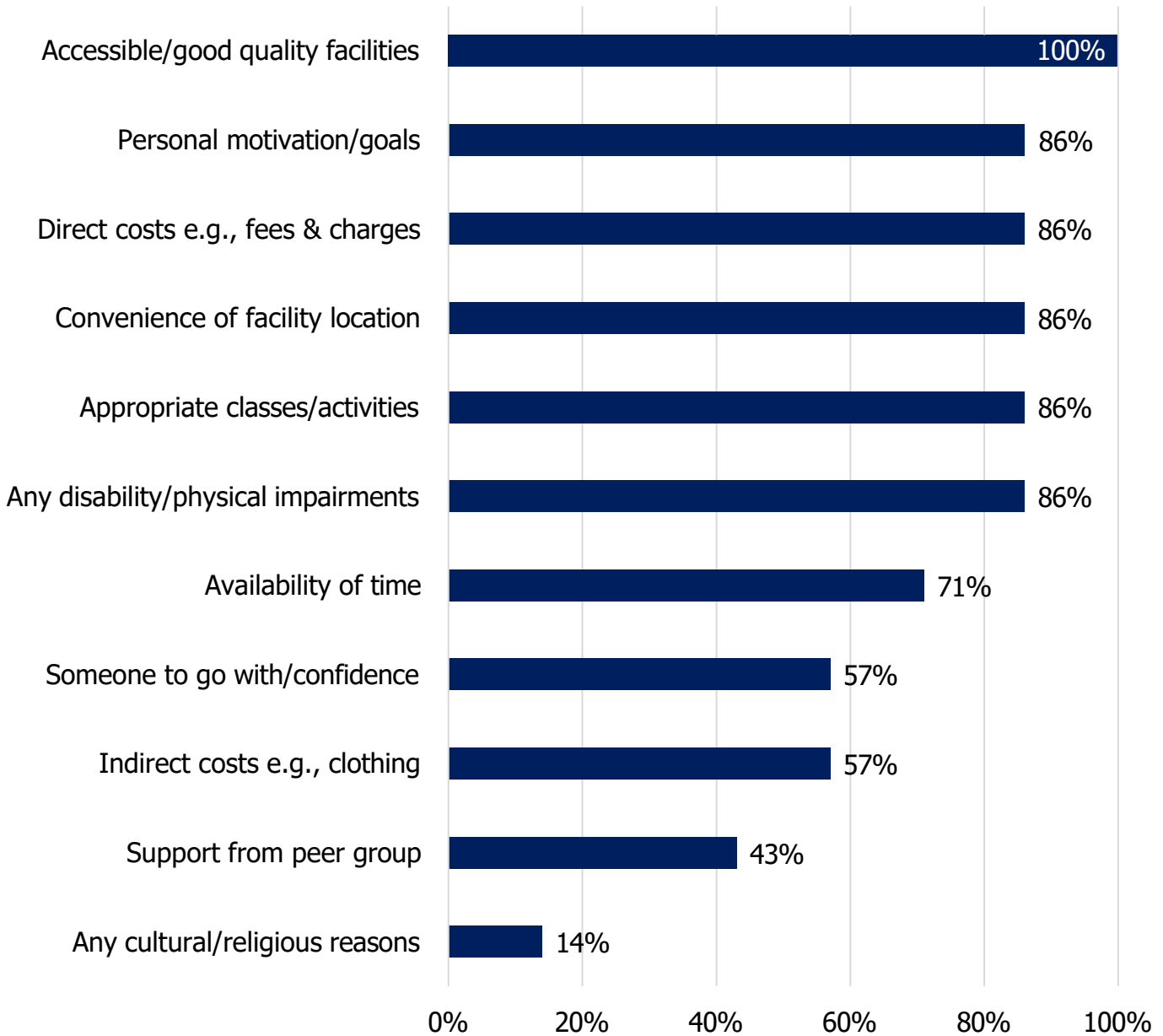
How interested are you in getting more active? (Disability)



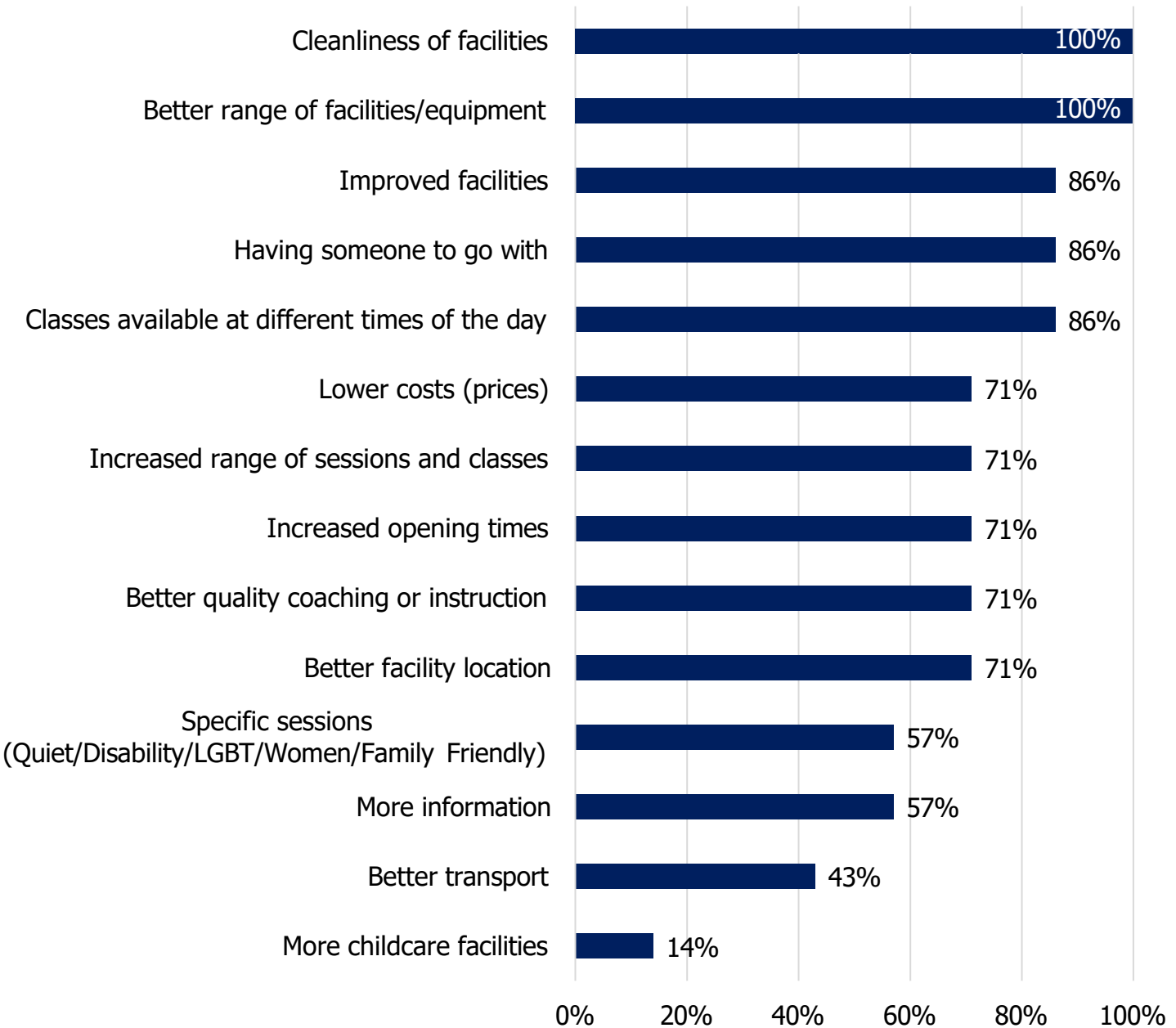
What are the main reasons you are currently not exercising? (Disability)



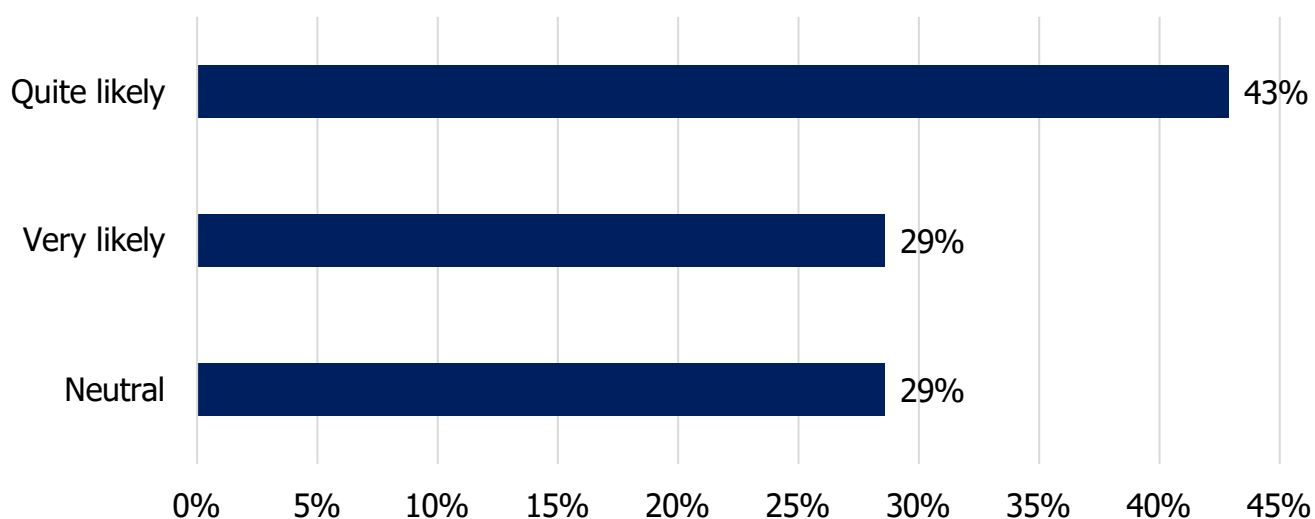
How important are the following when you think about doing more physical activity/exercise? (Very important and Quite important %) (Disability)



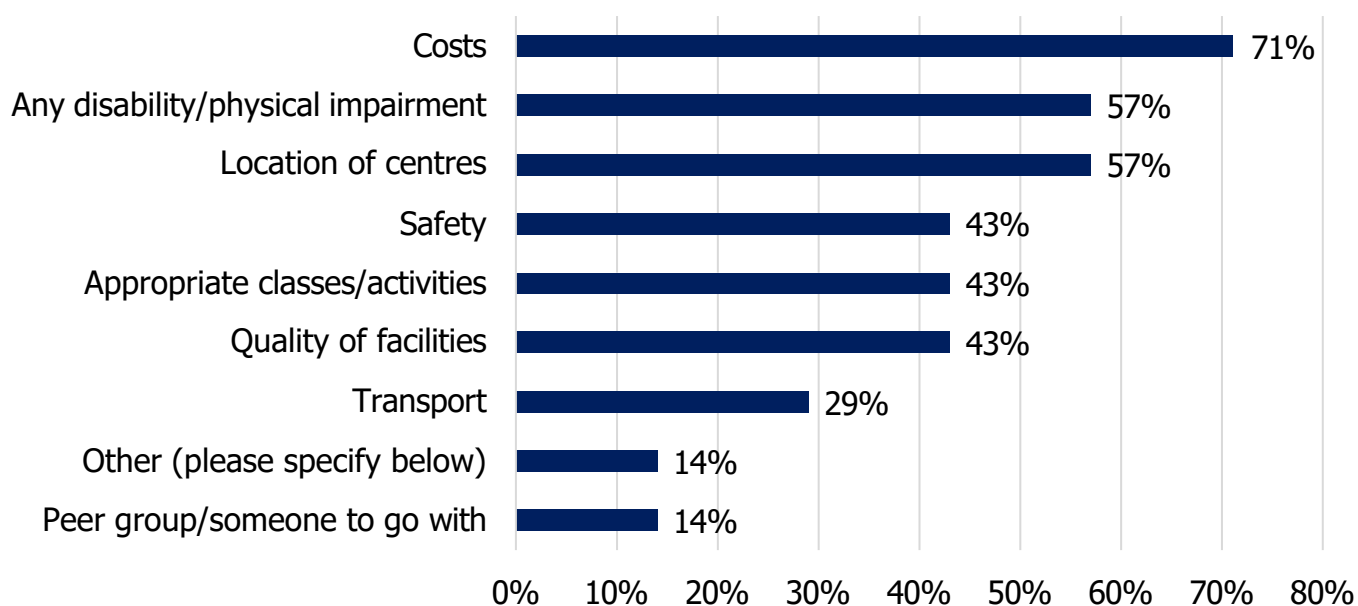
To what extent would the following things encourage you start doing more physical activity/exercise? (Somewhat and Very much %) (Disability)



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



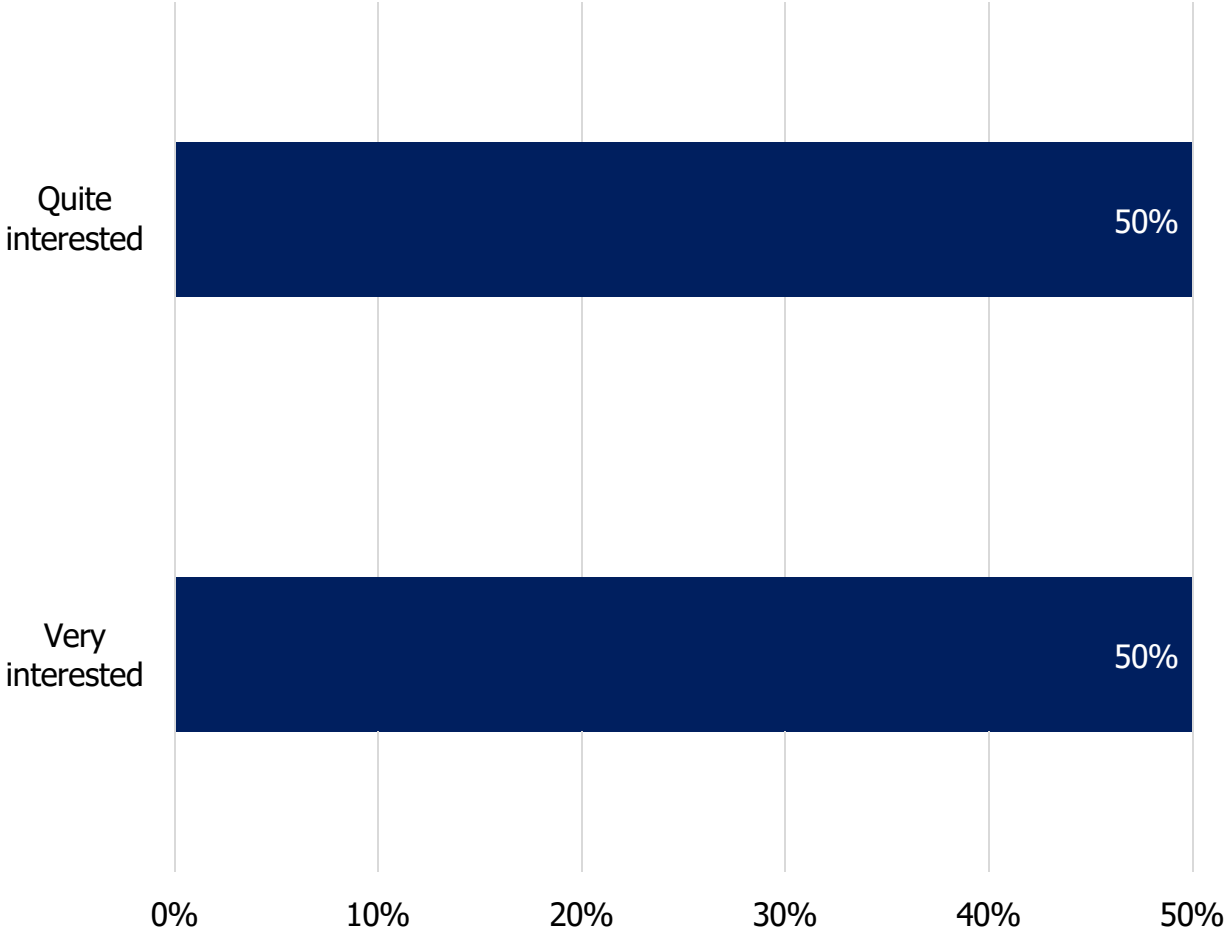
Please tell us the reason for your answer to the previous question (Disability)



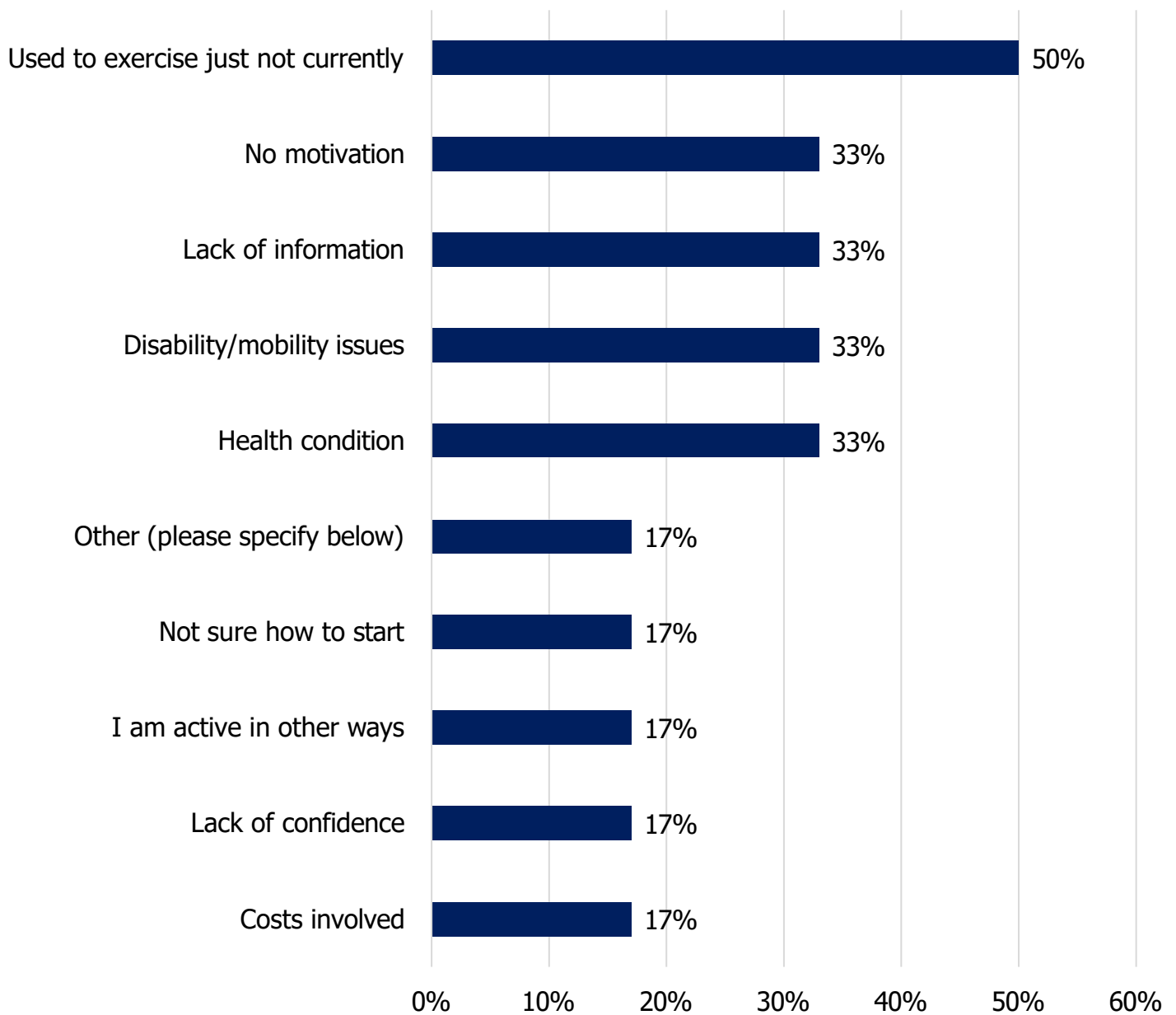
Breakdown by those aged 65+

Sample – 6

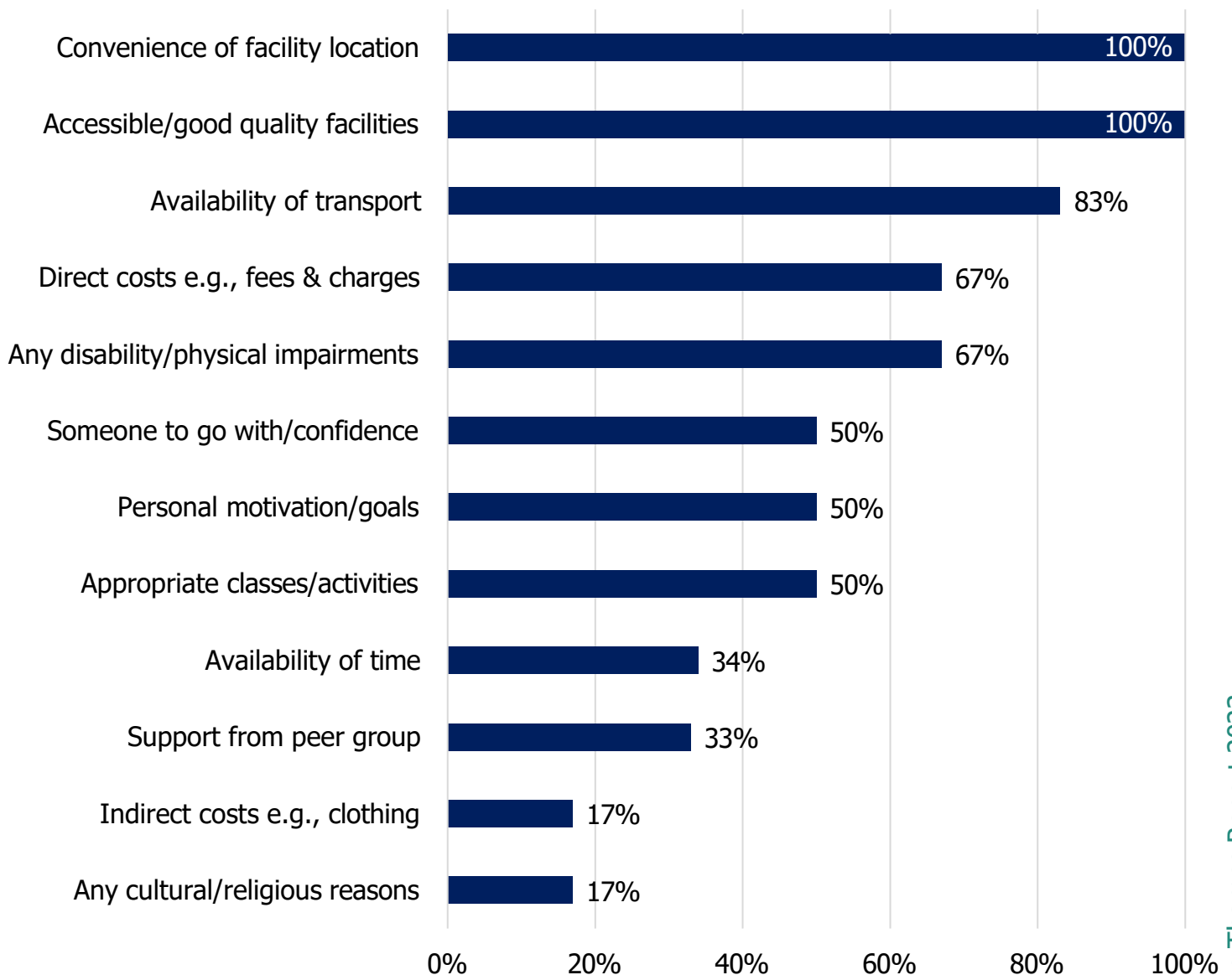
How interested are you in getting more active? (65+)



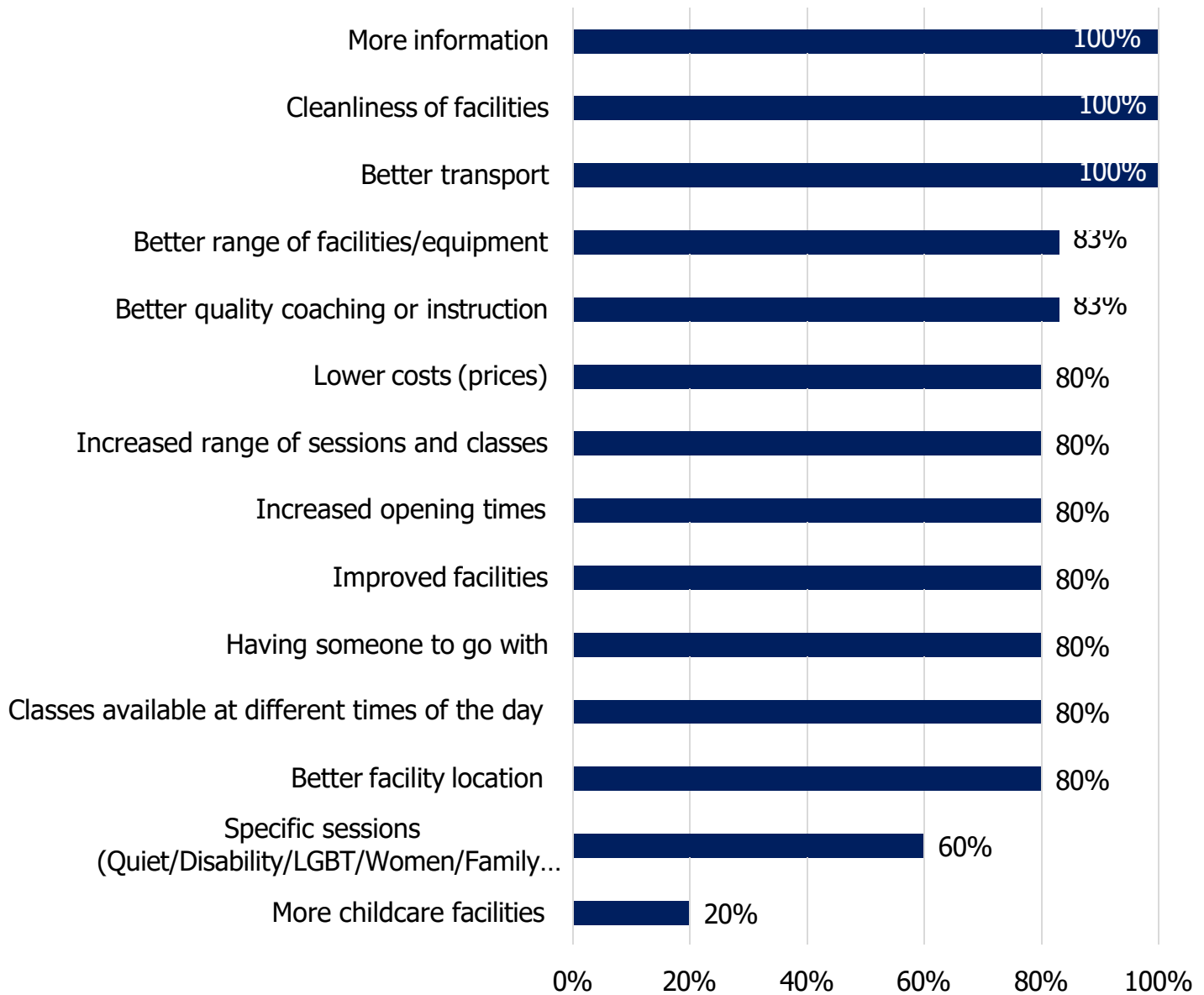
What are the main reasons you are currently not exercising? (65+)



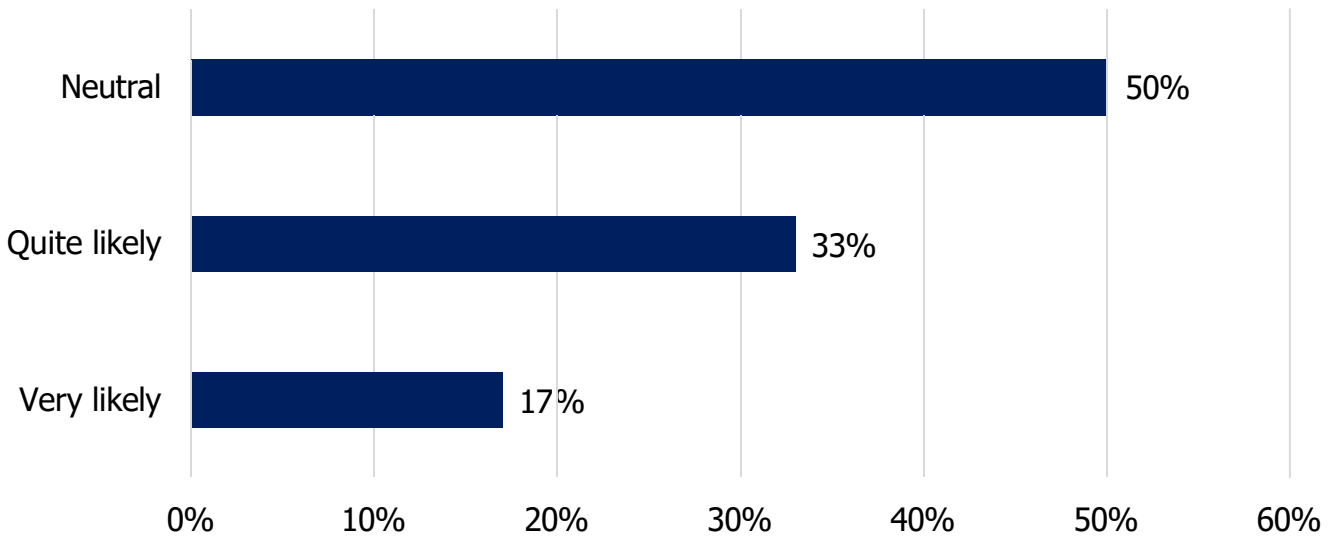
How important are the following when you think about doing more physical activity/exercise? (Very important and Quite important %) (65+)



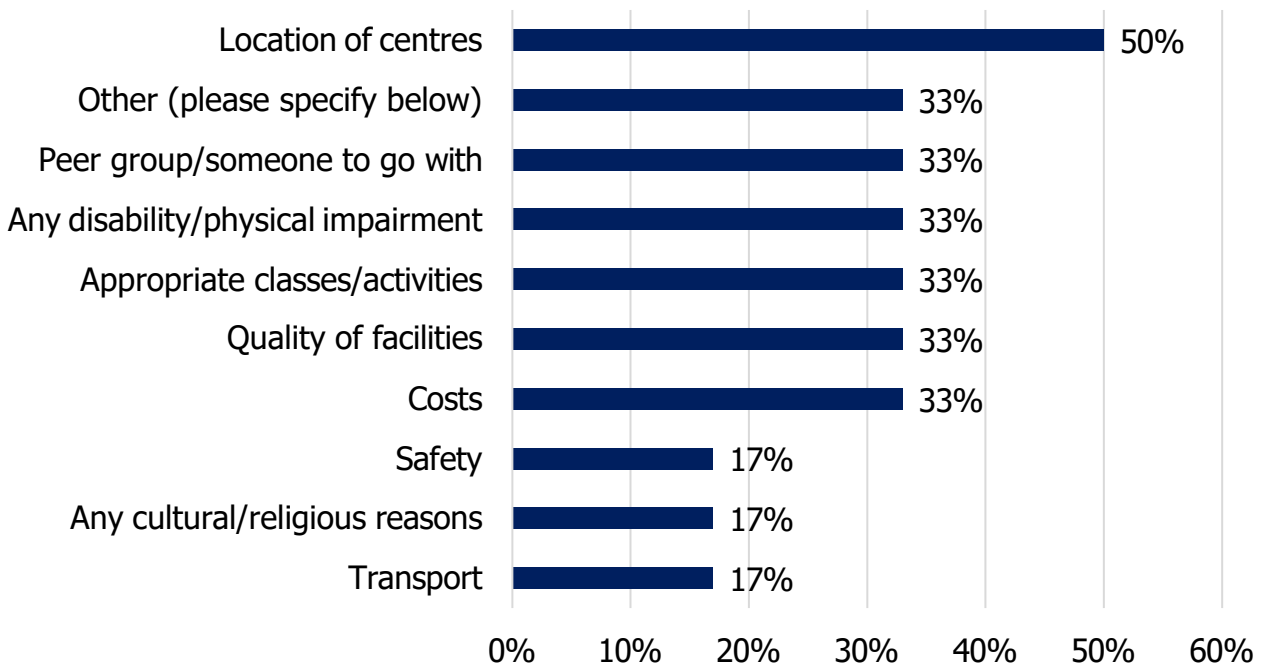
To what extent would the following things encourage you start doing more physical activity/exercise? (Somewhat and Very Much %) (65+)



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

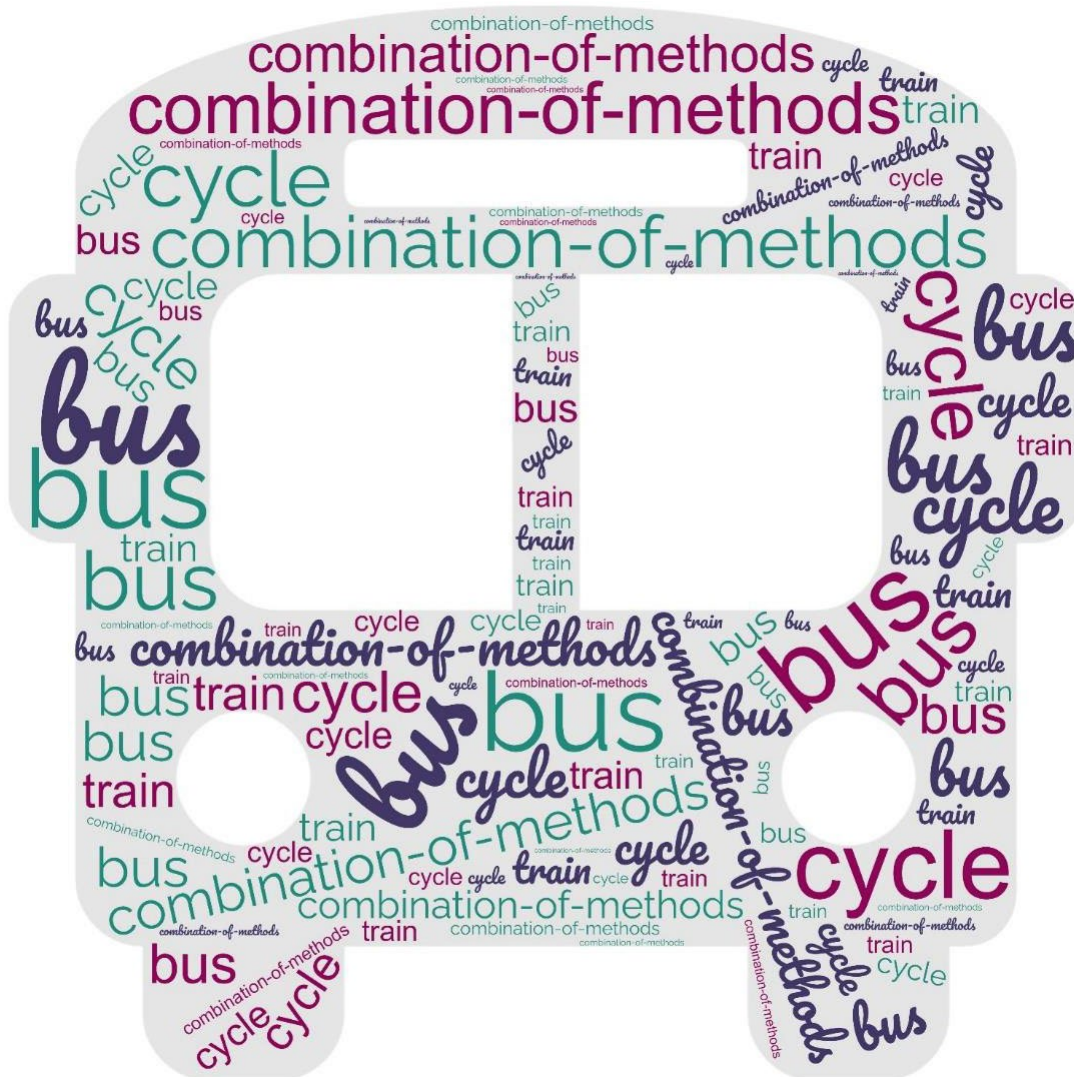


Please tell us the reason for your answer to the previous question (65+)



07 Appendix 1 - Open Responses

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



Top 4 Trends:

Bus

Combination of methods

Cycle

Train

Open Responses

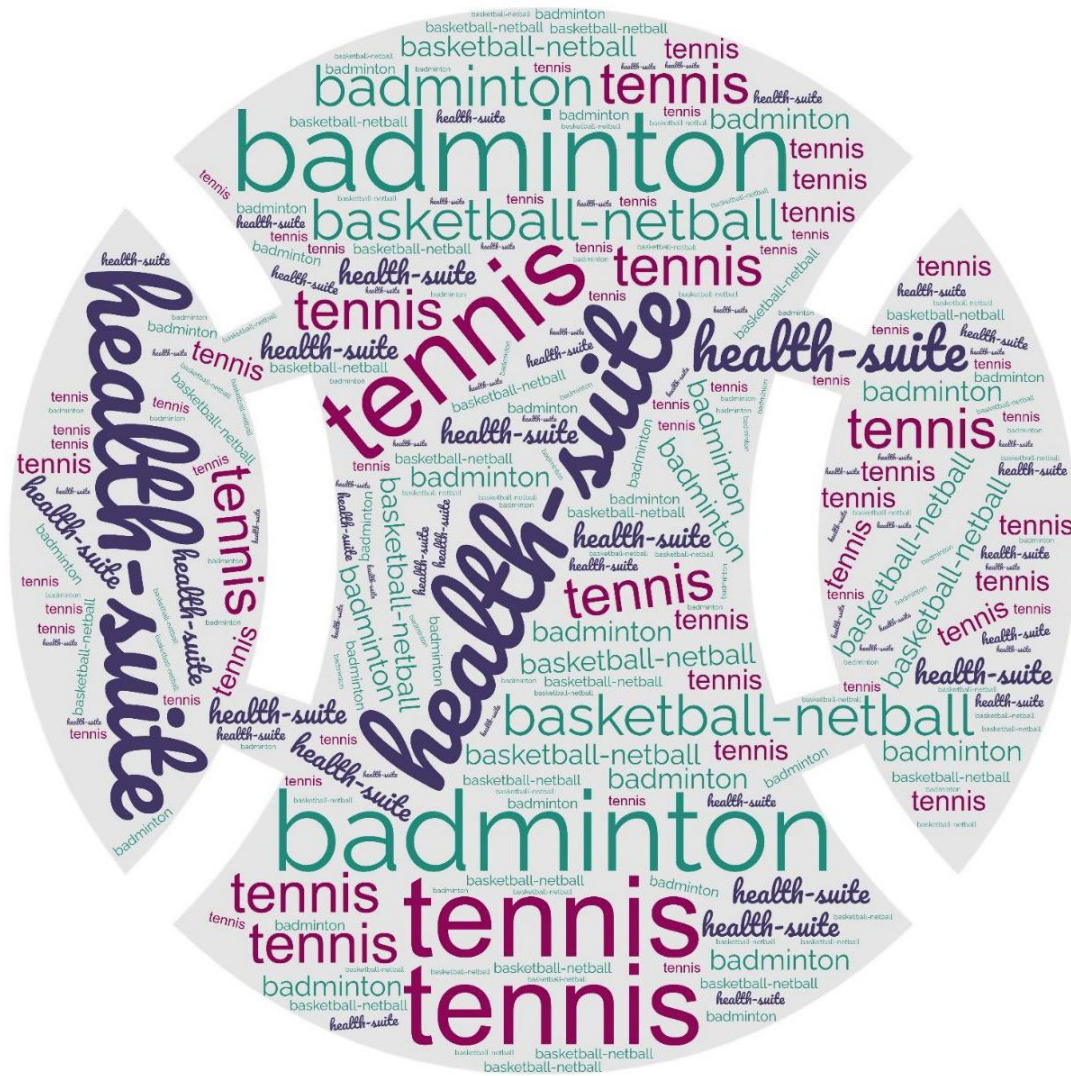
What is the main reason you visit the leisure centre?
Other:



- Top 5 Trends:
- Mental Health
 - Swimming
 - Exercise
 - Family activities/time
 - Socialise

Open Responses

Which facilities are most important to you?
Other:



Top 4 Trends:

- Badminton
- Health Suite
- Tennis
- Basketball/Netball

Open Responses

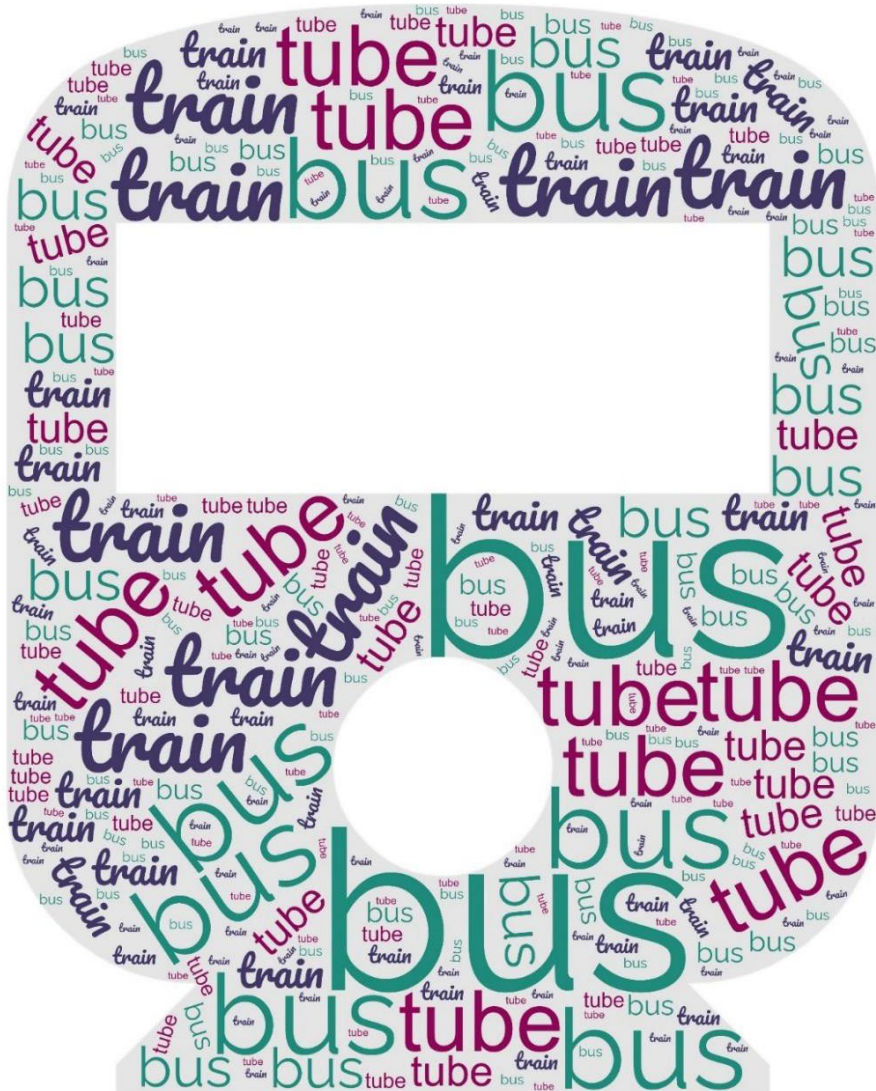
What do you like about the centre(s) you are using?
Other:



Top 3 Trends:
Swimming Pool/Outdoor Pool
Friendly, helpful staff
Community feel

Open Responses

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



Top 3 Trends:

Bus

Tube

Train

Open Responses

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

Other:



Top 3 Trends:

Cafe

Massage/Physio sessions

Creche/Children's activities