



Moving Communities Facilities Impact Report

April 2023 – March 2025



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Foreword



At a time when the importance of health, wellbeing, and community connection has never been clearer, I am proud of the vital role that Moving Communities continues to play in helping to understand and support community assets. In a changing and often challenging landscape for public leisure, Moving Communities not only showcases performance, but helps us to understand the evolving needs of the people and places we serve.

This report shares the last two full years of operational data and provides a window into how public leisure facilities are serving communities – especially those who need them most – and how they drive significant social value, thanks to a highly skilled and passionate workforce facing the challenges of a fragile financial picture. The key message is one of resilience and consolidation in the face of numerous challenges. Moving Communities continues to shine a light on what's working, where support is needed, and how we can work collectively to ensure our facilities remain inclusive, welcoming, and sustainable. This is vital given the role that facilities play supporting local places to transition to an active wellbeing service.

High-quality data sits at the heart of good decision-making. This year's report reflects an important step forward in the quality, consistency and depth of data being collected across the country. Thanks to the continued commitment of local authorities, operators and delivery partners, the insights we now gather are more robust, timely and representative than ever before. The strengthened evidence base, presented in both this report and through

the dynamic online platform is supporting our sector to move from observation to action with greater confidence and to continuously improve operations.

Wider sector initiatives such as OpenActive and Digital Futures provide a roadmap for how our sector can create efficiencies in data quality and data sharing. OpenActive is an ambitious, community-led initiative helping people to more easily find and book sport and physical activity opportunities online. Moving Communities has started working to these open data standards by aligning activity types across multiple operators and systems to support benchmarking. ukactive's [Digital Futures](#) programme helps organisations measure and continuously improve their digital infrastructure and culture. Moving Communities is working with organisations engaged on this programme to drive greater value from the depth of data and insights held across the sector, one of the five critical digital maturity areas identified in Digital Futures. We are at the start of that journey in terms of delivery and further collaboration will align these initiatives with the vision of Moving Communities.

I'd like to extend my sincere thanks to the consortium of partners who deliver the Moving Communities service: [Sheffield Hallam University](#), [Right Directions](#), [Active Insight](#), [Loughborough University](#) and our lead partner [4Global](#). Your collective expertise and dedication have been vital to the programme's success.

A special thank you to all those hundreds of leisure centres that regularly engage and share high-quality data with us. Your commitment and forward-thinking approach are helping the sector tell its story with confidence – and champion its value at every level.

My thanks also go to the **Moving Communities Board**, whose strategic guidance and vision have helped shape the programme and identify opportunities for wider growth and development.

We are proud of what this programme represents: impact, collaboration, and a shared commitment to helping people lead active lives. As we look ahead, Sport England remains committed to working alongside these partners as part of our Uniting the Movement strategy – showcasing how our public leisure infrastructure transforms to an Active Wellbeing service and continues to be a cornerstone of active, healthy, and connected communities.

Lisa Dodd-Mayne

Executive Director – Place, Sport England



Executive summary

The Moving Communities Facilities Impact Report (April 2023 – March 2025) highlights how England's public leisure facilities continue to deliver significant social, financial and community impact through resilience and recovery.

Participation has stabilised with centres averaging c.14,000 unique users per site in 2024/25. **Women make up 53% of users** – a welcome counter point to the national picture – and there has been **positive growth across older people (age 55+)**. There has also been an encouraging engagement from participants in the most deprived areas (**IMD 1-2**) which **grew modestly** but remains low at 16%, compared to 25% from the least deprived areas (**IMD 9-10**). Whilst inequalities remain, the importance of multi-activity facilities providing balanced programmes that align to the needs of local communities showcases that a number of interventions are already driving wider outcomes.

The social value continues to grow with an estimated **£3.63 billion in social value being generated by the Moving Communities portfolio (1,419 sites)** in 2024/25, largely from the value to individuals of improved wellbeing (87%) and the value to society of changes in health outcomes (13%). The greatest health related savings are linked to depression and Type 2 diabetes. The **average social value per participant** increased from £237 to **£242**. The higher values are linked to older age groups and mixed use of wet and dry facilities.



Fitness and outdoor activities experienced the highest growth rates, while swimming returned to pre-pandemic levels.

Financially, the sector is still in a **fragile** position following the pandemic, the energy crisis and challenges across the economy, with **50% of centres showing a positive cost recovery**. Income gains (up by 9%) offset some of the rising staff costs and even with the reduction in the cost of utilities, they remain high compared to pre-pandemic levels, with further increases expected as water costs rise. Improvement in performance is noted across income, social value and throughput for facilities that are less than 10 years old compared to those over 10 years old. Though not statistically tested, large wet and dry sites showed an average 26% increase in income, 20% increase in social value and 20% increase in throughput for sites that were less than 10 years old compared to those greater than 10 years old.

Quality standards remain high, with **82% of facilities rated Very Good or Excellent** in Quest assessments and 85% of users describing centres as inclusive and welcoming. **Customer satisfaction with their overall visit is high (75%),** though the **Net Promoter Score decreased slightly from 28 to 25.** Digital access continue to improve, with 82% of users booking online. The **number of jobs advertised in the sector has slightly decreased** following a period of sustained growth in jobs requiring a wide range of transferable skills to meet customer needs.

Despite rising cost pressures and changes in the profile and frequency of participation in some user segments, the sector has displayed remarkable resilience and consistency, providing services which are met with high levels of customer satisfaction. Financial performance, which is largely at a breakeven position, must be seen in the context of the social value achieved by facilities and the position of these assets as vital parts of local infrastructure. Facilities that are built in the right locations, with a facility mix that meets local community needs highlight the opportunity to maximise capital investment and ensure service arrangements drive outcome delivery. Demonstrating £3.6 billion in social value monetises the role of these assets in enhancing wellbeing and tackling inequalities, driving towards the delivery of an inclusive, active wellbeing service.



Section 1

About the service

Sport England's Moving Communities is driven by the largest data set ever gathered for the local public leisure facilities sector and was initially launched in March 2021 to support the National Leisure Recovery Fund, which saw £100m of government funding help the leisure sector recover from the pandemic.



The service collects data on user participation, finance, customer experience and service delivery at individual facility level for public leisure facilities.

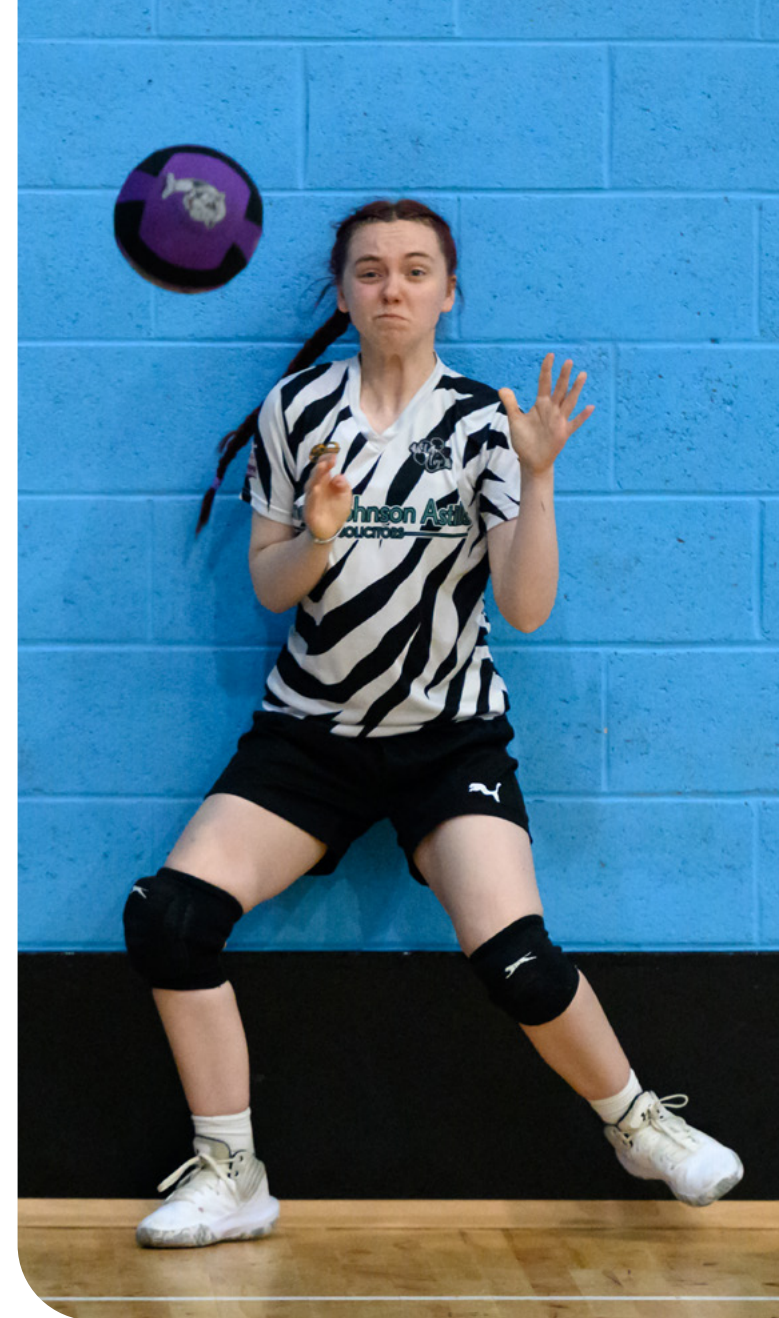
The data is then standardised and presented in dashboard format with a series of filters and benchmarks. This functionality enables local authorities, leisure providers and policymakers to compare their performance and inform strategic decisions about where time, effort and money are best invested to benefit local communities and the audiences most in need of help.

Tools such as maps and a calculator to measure the wider social impacts of physical activity taking place at these facilities, based on the [latest research](#) from Sheffield Hallam University, State of Life and Manchester Metropolitan University are available to all partners free of charge via the secure platform portal. The Moving Communities service sits alongside [Active Places](#) and [Active Lives](#) as an important data set to understand our progress in line with Uniting the Movement and our place-based way of working.

Scale and data capture methodology

In 2025, there were 1,419 public leisure facilities registered on the platform from 294¹ local authorities in England. Using 4Global's Datahub, a participation feed is automated from a facility's leisure management booking system into the platform wherever possible and updated monthly, whereas the financial data is updated manually on a quarterly basis. The Customer Experience survey is an online survey administered annually through local authorities and operating partners to users who have visited a facility in the last month asking for feedback on their most recent visit. National and local results from the survey can be viewed by users of the [platform](#).

The service delivery assessments are carried out at bespoke times relevant to that facility's operational performance as part of Sport England's Quest service. These sit alongside The Active Standard, a foundational quality mark for health and safety compliance developed by ukactive and its partners. The Active Standard forms the foundation of an operator's journey to improve standards and reduce risks, which is then elevated through the Quest service.



¹ This is a reduction in the number of Local Authorities compared to the report published in August 2024 due to local government reorganisation. There are 303 local authorities with responsibility for public leisure centres in England.

Figure 1.1 Sample breakdown by facility types

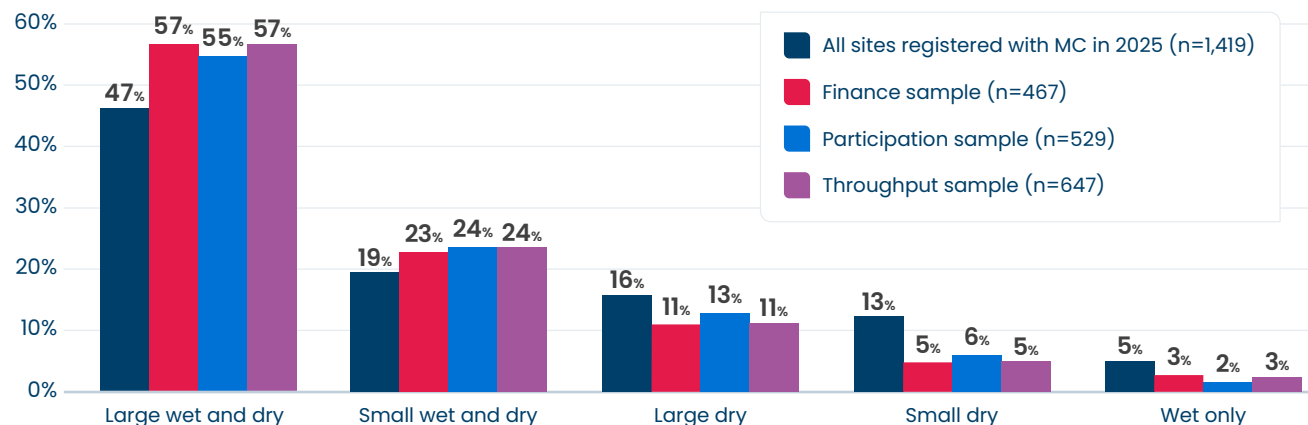
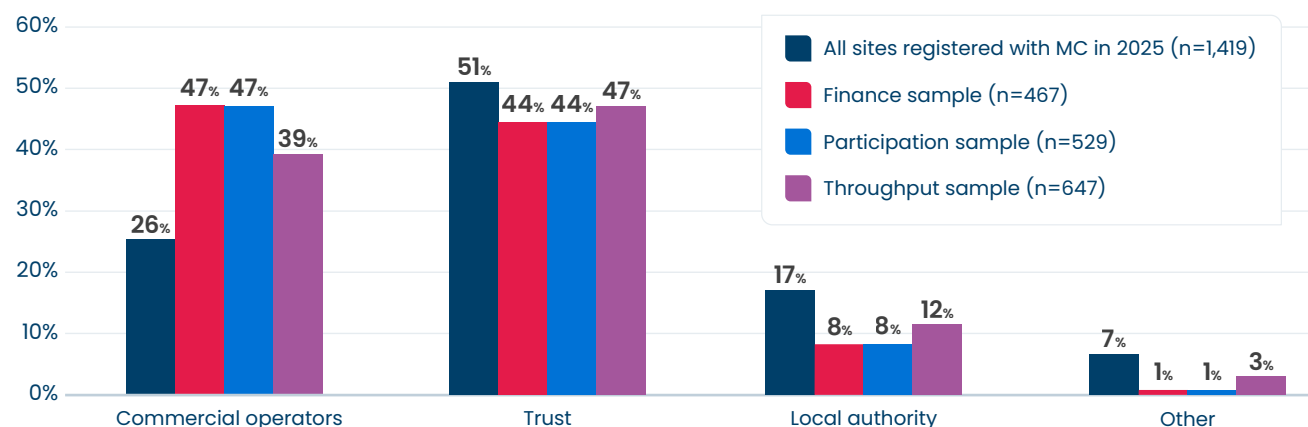


Figure 1.2 Sample breakdown by management types (as defined by [Active Places Power](#))



Focus of this report

This report has been produced by the Moving Communities consortium including Sheffield Hallam University and Loughborough University on behalf of Sport England. The analysis focuses on a subset of the 1,419 facilities on the platform, which is specifically the 529 facilities from 183 local authorities that submitted consistent participation data, 647 facilities from 221 local authorities that submitted consistent throughput data and the 467 facilities from 185 local authorities that submitted consistent financial data for the period April 2023 to March 2025. This sample has passed robust consistency and completeness checks to provide the highest quality data for a Moving Communities report to date.

The breakdown of those facilities is shown in Figures 1.1 and 1.2. To help the interpretation of these graphs, the sample composition is largely driven by mixed facility types and commercially and trust-managed centres. Large mixed sites make up between 55%-57% of the finance, participation and throughput samples and commercially managed sites account for 39%-47%.

Analysis method

Facilities have been included in this report on a matched-pairs basis, which means that every site included was in both the 2023/24 sample and the 2024/25 sample. However, because the findings in this report are reflective of a sample of facilities rather than all facilities in England, the results and any assumptions made about the sector as a whole should be interpreted with these points in mind. It is important to acknowledge the overlap of data across this report and this [previous one](#), noting that April 2023–March 2024 data will be reported in last year's report as well as this year's.



Section 2

Participation

Participants are defined on Moving Communities as individual users of facilities whose demographic data, specifically age, gender and postcode, are known. This section focuses on 529 facilities across 183 local authorities in England that submitted consistent participation data between April 2023 and March 2025.



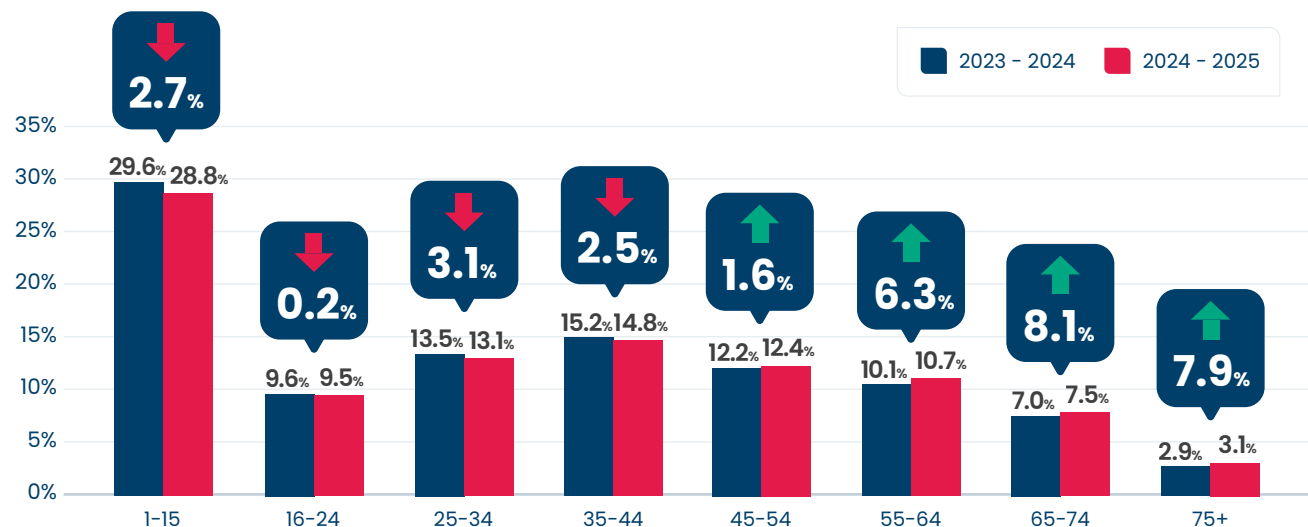
Moving Communities recorded a total of 7,493,768 participants at an average of 14,166 unique participants per site in 2024/25.

The average number of participants per site grew by less than 1% over the two-year period, indicating participation has stabilised after a period of recovery following the pandemic period of 2020/21. The balance between known users and unknown casual users is 76% known with the remaining 24% being unknown casual users.

Age

The age profile of unique participants in 2023/24 and 2024/25 across the 529 sites is shown in Figure 2.1. Marginal increases were seen in people over the age of 45, traditionally a group whose participation tends to steadily fall once they reach their mid-40s. The statistically significant decrease of 2.7% in participants aged 1-15 may reflect lower numbers of swimming lessons following the abnormally high demand after the pandemic affected years.

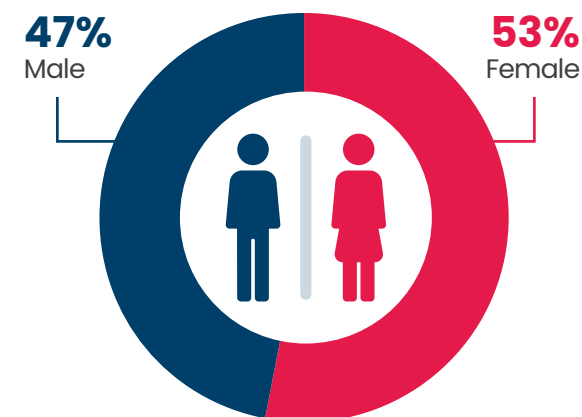
Figure 2.1 Percentage of unique participants by age in 2023/24 and 2024/25



Gender

The gender profile of unique participants in 2024/25 across the 529 sites was 53% females and 47% males as shown in Figure 2.2. This finding is consistent with last year's report, reinforcing that leisure centres are a welcome counterpoint to the national picture which shows that men participate more in sport and physical activity than women. Participation figures show that access to swimming, fitness activities and group exercise enables women to participate sport and physical activity in a variety of ways.

Figure 2.2 Percentage of unique participants by gender in 2024/25



Deprivation

Moving Communities assigns an Office for National Statistics Index of Multiple Deprivation (IMD) decile between 1 and 10 to a participant's home postcode. This proxy measure shows growth in the number of unique participants recorded by Moving Communities across all deciles due to the rising quality of data available through the service.

In 2024/25, participation from individuals in the most deprived 20% of areas in England (IMD 1-2) remains the lowest overall at 16% of users as shown in Figure 2.3.

Figure 2.3 Percentage of unique participants by IMD in 2024/25

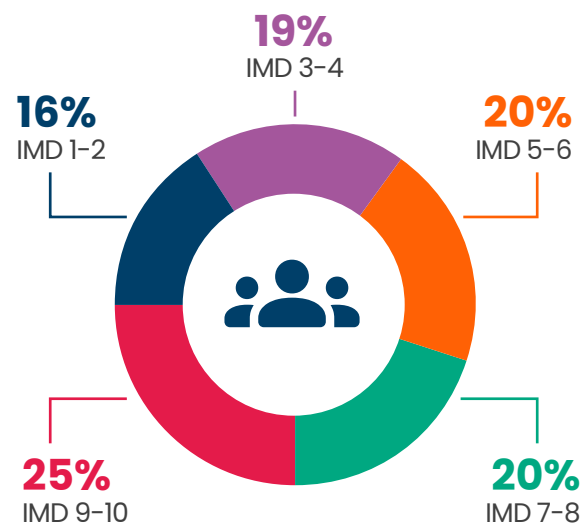
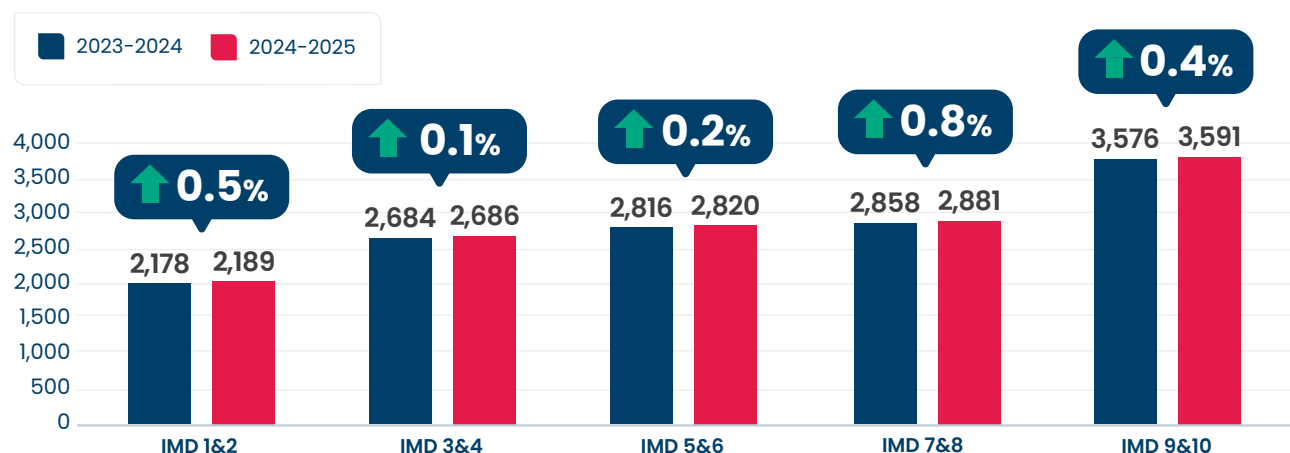


Figure 2.4 Average number of unique participants per site by IMD in 2023/2024 compared with 2024/25

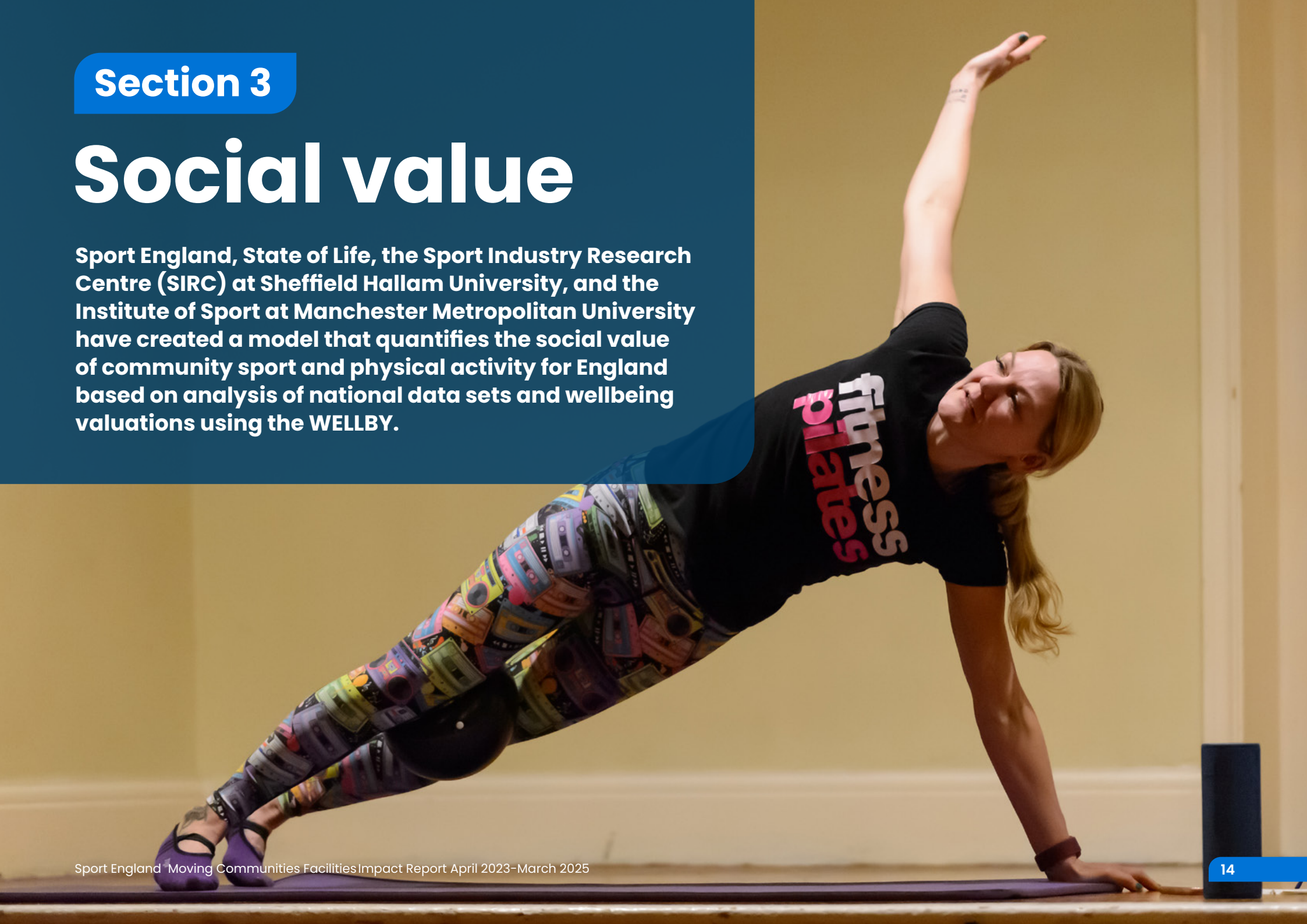


However, the second highest rate of growth in average participants per site was from the most deprived areas (IMD 1-2), which increased by 0.5% and although modest, is a statistically significant change. This finding may be indicative of the success of targeted interventions reaching more deprived communities, showing the role that these sites can play in helping to reduce inequalities. The proportionately higher gain amongst people from the most deprived areas in England is not a one-off occurrence, rather it is a continuing message from the last three years' worth of data from Moving Communities. However, the scale of the improvement is insufficient to narrow the participation gap between less deprived areas and the most deprived areas. 25% of participants came from the 20% least deprived areas (IMD 9-10), which was approximately 1.6 times more than that of the participation from the 20% most deprived areas (IMD 1-2) at 16%.

Section 3

Social value

Sport England, State of Life, the Sport Industry Research Centre (SIRC) at Sheffield Hallam University, and the Institute of Sport at Manchester Metropolitan University have created a model that quantifies the social value of community sport and physical activity for England based on analysis of national data sets and wellbeing valuations using the WELLBY.



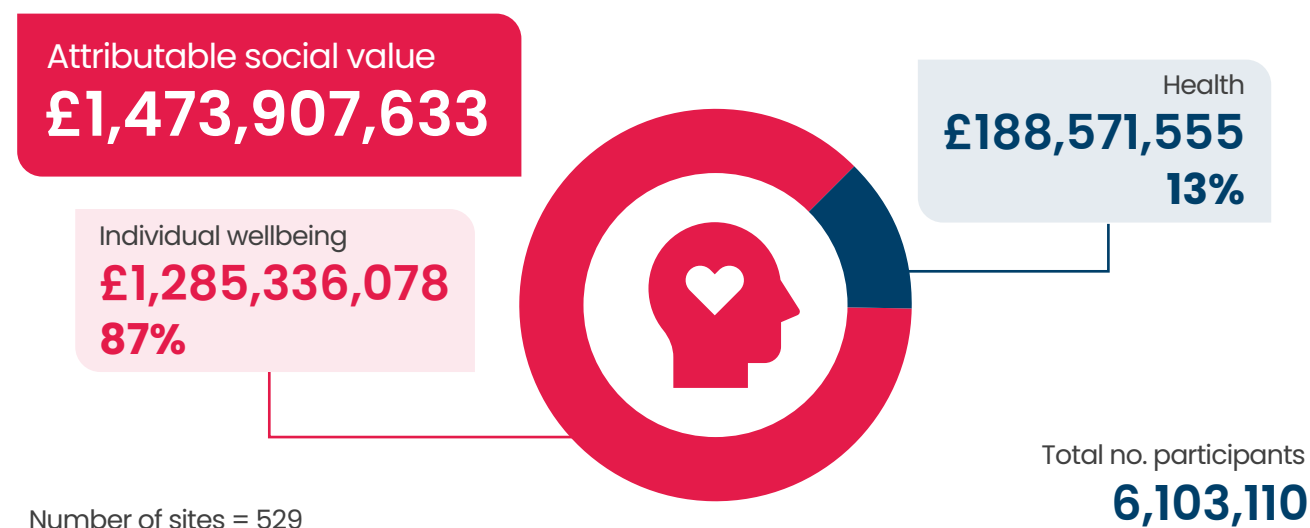
The model aligns where possible to the guidance provided by the HM Treasury Green Book², which defines social or public value as “all significant costs and benefits that affect the welfare and wellbeing of the population”.

The outcomes included in the model are categorised as (a) primary values: the direct benefit and value to individuals of improved wellbeing; and (b) secondary values: the wider value to society, including the state, of changes in health outcomes. Moving Communities applies the model by enabling local authorities and operating partners to ‘monetise’ the positive impact generated by unique participants in public leisure facilities.

Based on the 529 sites that provided high quality participation data, Moving Communities estimates that the total attributable³ social value for participation undertaken in these centres amounts to £1.47bn between April 2024 and March 2025. If we assume that these 529 sites are broadly representative of the 1,419 sites registered with Moving Communities, then the aggregated attributable social value for the entire Moving Communities portfolio is estimated at £3.63bn in 2024/25.

The £1.47bn represents both the primary value of the wellbeing benefits that individuals experience from being active; and the secondary value, which reflects the cost savings to public services such as healthcare. The calculator splits the total attributable value of £1.47bn into £1.28bn (87%) of primary benefit to participants’ wellbeing and £188m (13%) of secondary value such as cost savings through reduced incidences of disease resulting in reduced demands on health services.

Figure 3.1 Attributable social value for 529 sites between April 2024 and March 2025



² <https://www.gov.uk/government/publications/green-book-supplementary-guidance-wellbeing>

³ Attributable social value refers to the social value attributable to sport and physical activity that takes place at public sport and leisure facilities. We acknowledge that customers acquire social value from other sources of sport and physical activity. The amount attributable to public sport and leisure facilities is around 36% of a customer’s total social value.

The greatest health-related cost savings associated with participants contributing social value in the 529 sites are linked to depression and Type 2 diabetes with estimated savings of £51m and £49m respectively. Together these conditions

account for 53% of the net-health related cost savings. These conditions, along with back pain contribute to the 131 million working days that are lost each year to sickness absence in England.

The total social value of £1.47bn is primarily driven by large wet and dry sites, which contributed 69% of the total social value generated across the MC sites.

Figure 3.2 Estimated health cost savings (£millions) in 2024/25

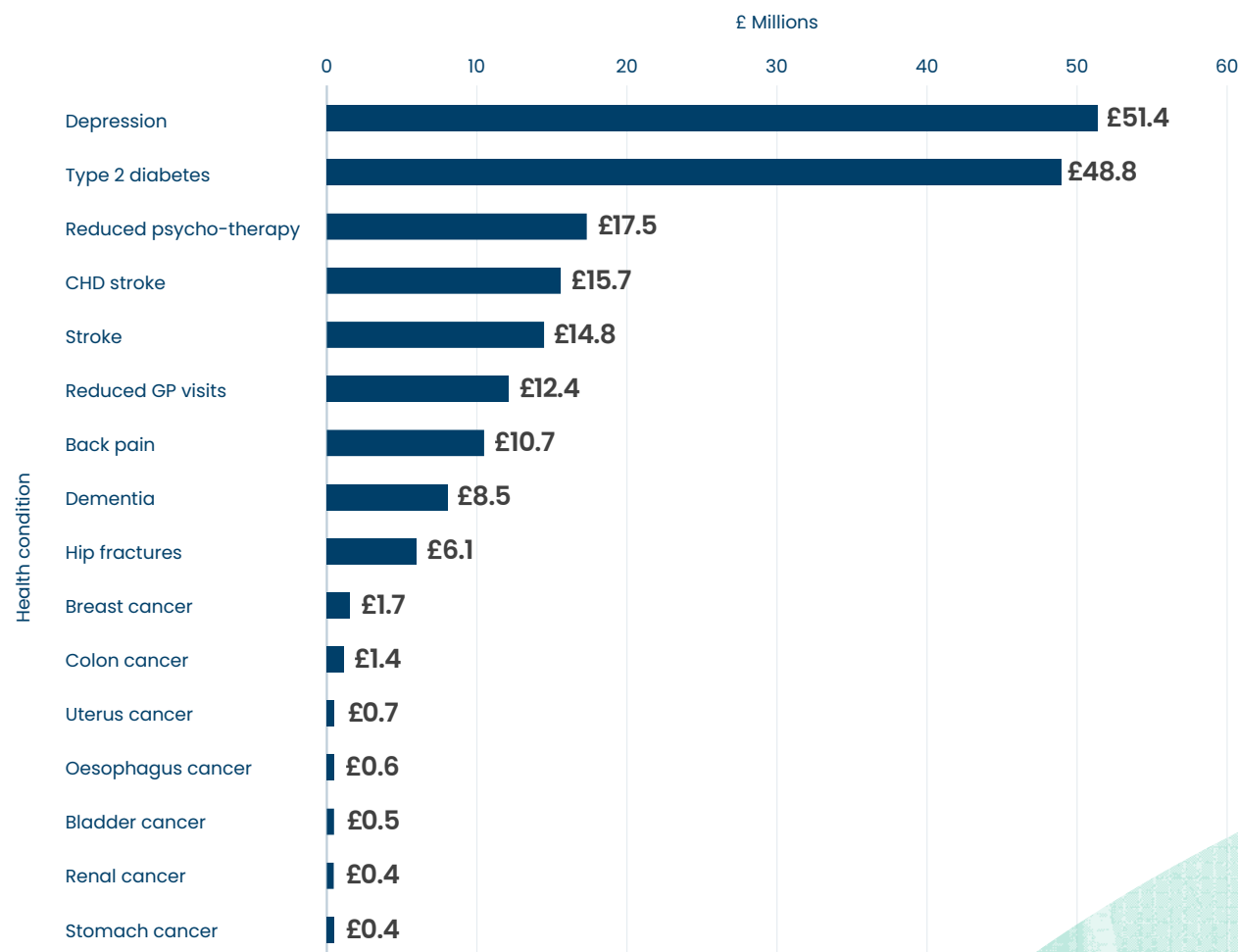
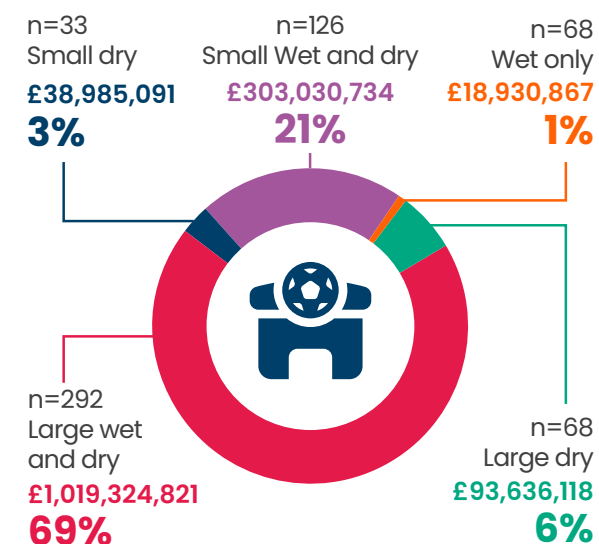


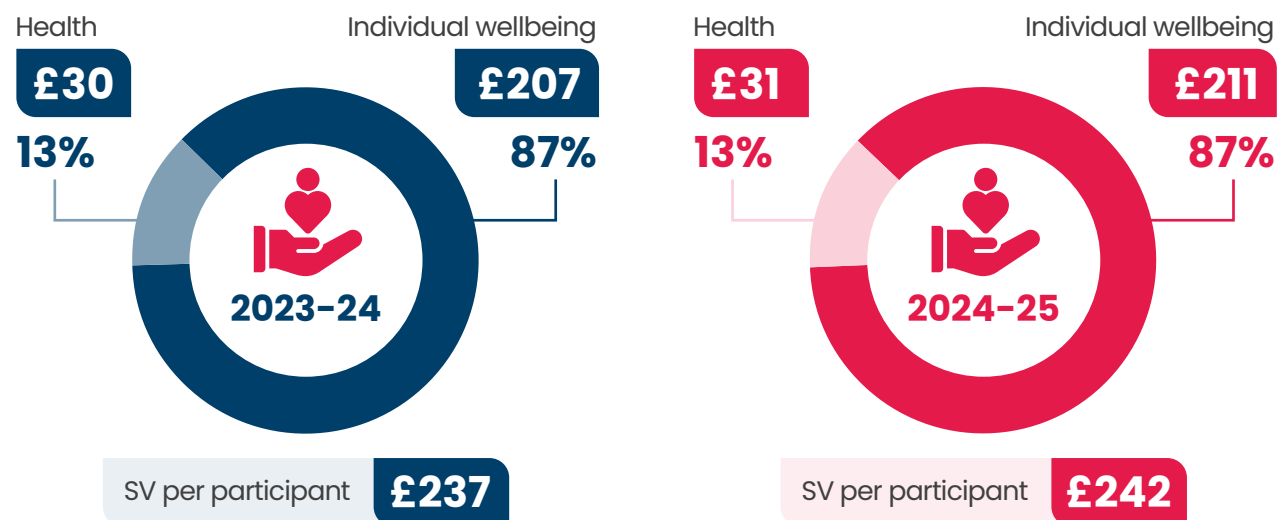
Figure 3.3 Attributable social value by facility type 2024/25



The average social value per participant has increased by almost 2% between 2023/24 and 2024/25 from £237 to £242. The higher average attributable social value per participant may be related to subtle shifts in the demographics of participants using MC sites between the two periods. The statistically significant increase in the number of older participants is important given the higher weightings applied in the social value calculator as age increases. This is because Sport England's social value of sport and physical activity in England report shows that based on similar activity levels, on average, older adults (65+) generate up to 1.5 times the social value of average aged adults on health-related cost savings. In addition, participants aged 75+ have a relatively higher wellbeing value (1.12 times the average adult score).

Other reasons for the higher average social value increase could also include the higher ratio of female participation rates to male participants (linked to reduced conditions relevant to women e.g. breast cancer) and more people sustaining the required 150 minutes of moderate intensity physical activity per week more consistently.

Figure 3.4 Average attributable social value per participant 2023/24 and 2024/25



Average attributable social value varies by facility type with large mixed sites having the highest average attributable social value per participant (£244 in 2024/25). Wet only facilities had the lowest average attributable social value per participant (£193 in 2024/25).

However, wet only facilities had the highest percentage increase (4.3%) and large mixed sites had a slower rate of increase (1.4%). These estimates are driven largely by the amount of time spent taking part in moderate or vigorous intensity physical activity. It is likely that people who use wet only facilities will participate for less time than those who make use of a variety of facilities in mixed sites.

For further guidance on the social value calculator:

[Click here →](#)

For how this relates to other social value models:

[Click here →](#)

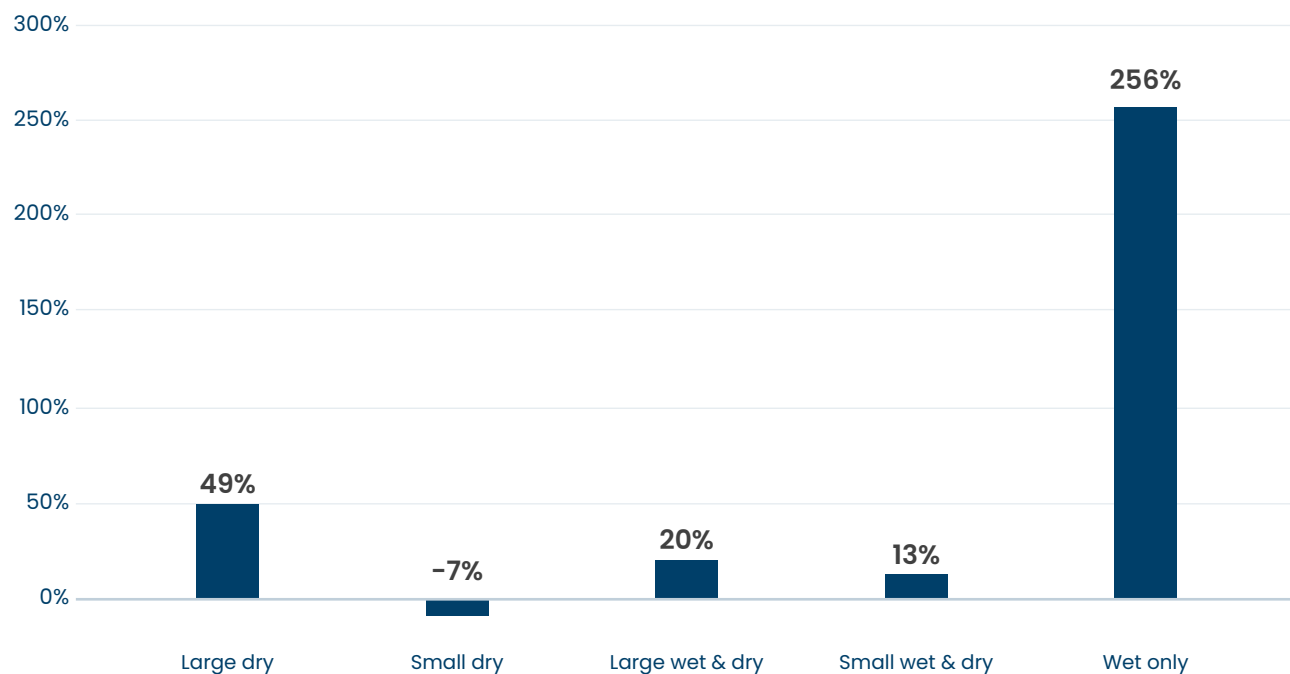
Figure 3.5 Average attributable social value per participant by facility type 2023/24 compared with 2024/25

	2023/24	2024/25	Changes 24/25 v 23/24	
All Sites	£237	£242		+1.9%
Large Dry	£229	£236		+3.0%
Large Wet and Dry	£241	£244		+1.4%
Small Dry	£224	£231		+3.3%
Small Wet and Dry	£234	£240		+2.6%
Wet Only	£185	£193		+4.3%

When looking at centres by their year of construction or significant refurbishment, all facility types, with the exception of small dry sites, built or significantly refurbished in the last 10 years generated at least 13% more social value per site in 2024/25 compared to centres built more than 10 years ago. Large wet and dry sites less than 10 years old recorded 20% more social value per site relative to similar facilities more than 10 years old.



Figure 3.6 Percentage difference in social value per site by facility type for a facility that is less than 10 years old compared to a facility that is 10+ years old in 2024/25 (n = 519 sites)



Section 4

Throughput

Throughput is defined as visits to the facility split by the main activity completed and is made up of known participants (as defined previously) and unknown casual users.

This section focuses on 647 facilities across 221 local authorities in England that submitted throughput data between April 2023 and March 2025.

Throughput data is the entry level data field required to join Moving Communities.



Moving Communities recorded a total of 169,434,368 visits at an average of 261,877 visits per site in 2024/25.

The average number of visits per site grew by less than 1% over the two-year period, indicating that visits have stabilised after a period of recovery following the pandemic, although the type of activity in which participants take part has changed during that period.

Activity

In 2024/25, the largest increase in the number of visits by activity type was seen in outdoor and fitness activities, which increased by 14% and 13% respectively. Swimming-related activities saw the largest declines. This finding can be partially explained by swimming lessons reverting to pre-Covid numbers. Group workouts remained relatively stable.

Figure 4.1 Average throughput per site by activity type

	2023/24	2024/25	Change	Change %
Swimming lessons	55,940	52,167	-3,773	 -6.7%
Swimming activities	67,534	59,242	-8,292	 -12.3%
Sports hall activities	12,991	£244	+208	 1.6%
Outdoor activities	4,605	5,252	+647	 14.0%
Other activities	32,339	33,279	+940	 2.9%
Group workout activities	27,255	27,108	-147	 -0.5%
Fitness (gym) activities	80,097	90,711	+10,614	 13.3%

Looking at participant breakdown by activity in 2024/25 compared to 2023/24 highlights changes in the demographics of individuals completing fitness (gym) and swimming activities. The increase in fitness (gym) activities has been driven by an increase in under 16 participants per site of 21.2%, followed by an increase in participants aged 65+ per site of 19.1%.

Female participants per site taking part in fitness (gym) activities increased by 12.4% and participants from IMD 1&2 per site also increased by 7.0% in 2024/25 compared to 2023/24.

The decrease in swimming activities has been driven by a reduction in female participants per site, which has fallen by 10.5%, and participants from IMD 1&2 per site, which decreased by 9.5% in 2024/25 compared with 2023/24.

Figure 4.2 Percentage difference in participants by fitness (gym) activities in 2024/25 compared to 2023/24 (sample size = 529)

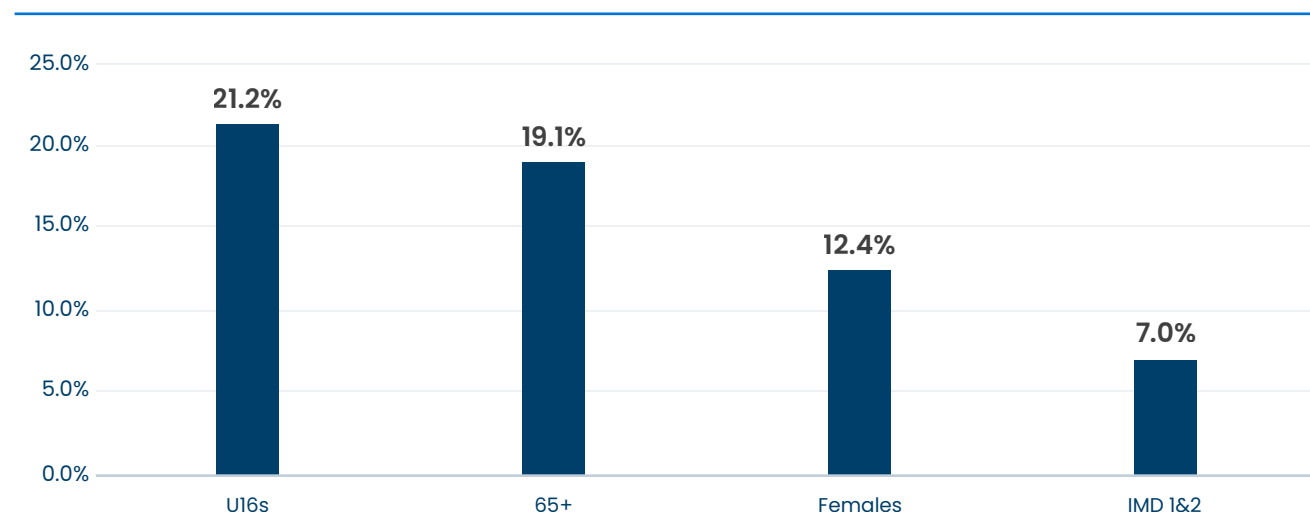
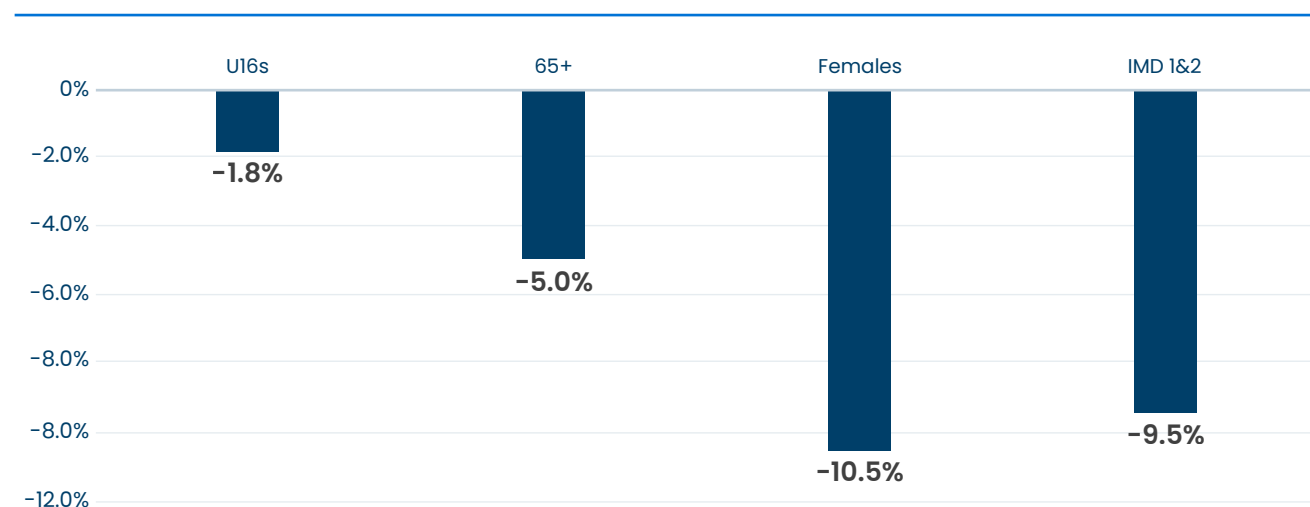


Figure 4.3 Percentage difference in participants by swimming activities in 2024/25 compared to 2023/24 (sample size = 529)



Overall, average throughput per site by facility type remained remarkably stable in 2024/25 compared with 2023/24. Exceptions include wet only sites (-2.8%), which is consistent with the reduction recorded in swimming participants; and dry only sites (+1.6% for large dry sites and +10.6% for small dry sites), which is consistent with the recorded increase in fitness (gym) activities. These findings are also in line with the growth in attributable social value generated from dry sites, with average attributable social value per site increasing by up to 7%.

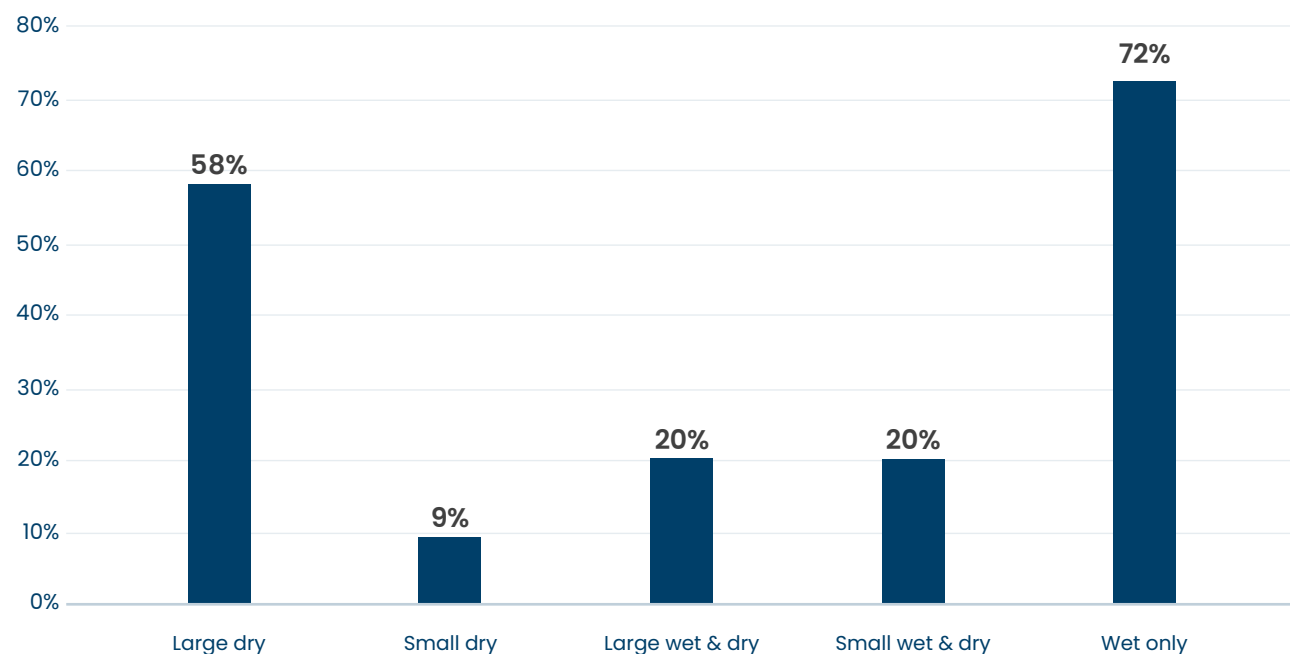
Figure 4.4 Average throughput per site by facility type

	2023/24	2024/25	Changes 24/25 v 23/24
All sites (n=647)	259,689	261,877	0.8%
Large Wet and Dry (n=368)	328,645	330,578	0.6%
Small Wet and Dry (n=153)	224,324	226,408	0.9%
Large Dry (n=74)	109,146	110,844	1.6%
Wet Only (n=17)	103,439	100,496	-2.8%
Small Dry (n=35)	83,442	92,300	10.6%

When looking at centres by their year of construction or significant refurbishment, all facility types built or significantly refurbished in the last 10 years achieved at least 9% more throughput per site in 2024/25 relative to centres built more than 10 years ago. Large wet and dry sites less than 10 years old recorded 20% more throughput per site relative to similar centres more than 10 years old.



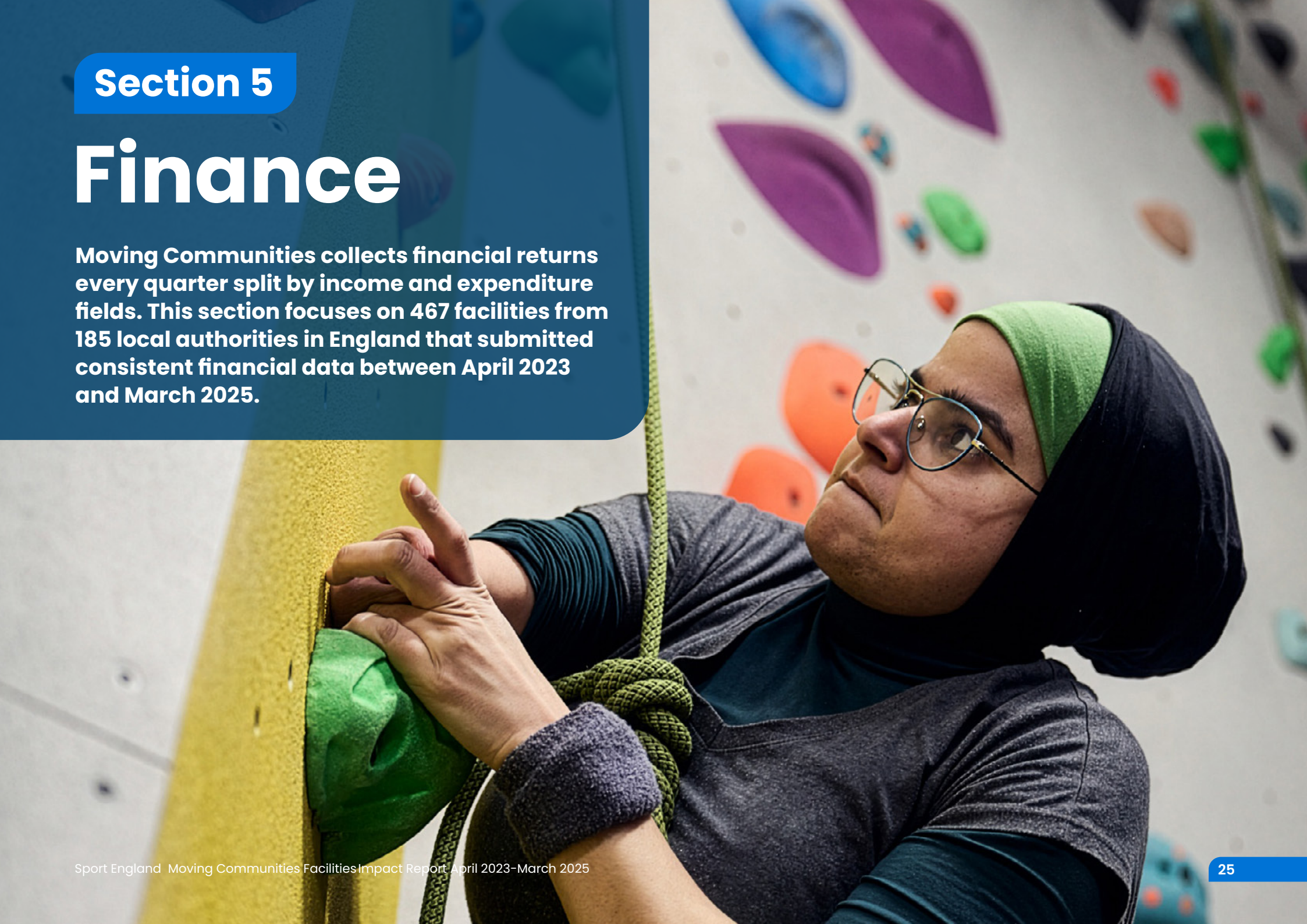
Figure 4.5 Percentage difference in throughput per site by facility type for a facility that is less than 10 years old compared to a facility that is 10+ years old in 2024/25 (n = 637 sites)



Section 5

Finance

Moving Communities collects financial returns every quarter split by income and expenditure fields. This section focuses on 467 facilities from 185 local authorities in England that submitted consistent financial data between April 2023 and March 2025.



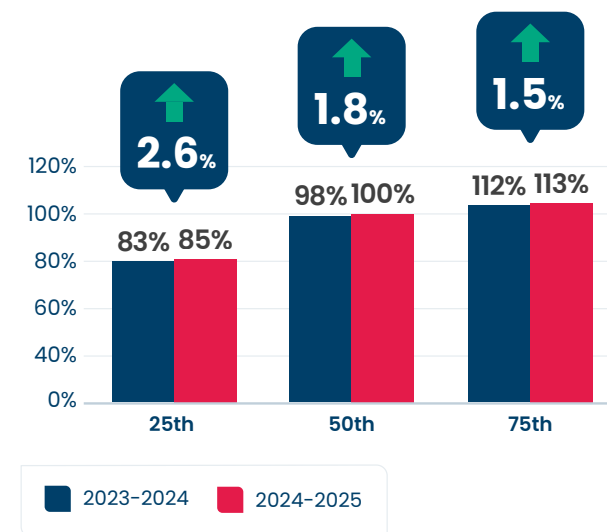
It is important to note that local policy and micro-economic pressures will impact all metrics across Moving Communities.

For example, councils may prioritise keeping prices affordable to promote access from their local community but equally, financial pressures may force certain decisions that have a limiting effect on the ability to deliver wider outcomes.

In 2024/25, greater availability and higher quality finance data on the Moving Communities platform have enabled a detailed analysis of cost recovery⁵ rates across the portfolio of facilities. Figure 5.1 shows the headline cost recovery rate scores for the sample of 467 sites that provided financial data. The cost recovery rates for each of the 467 sites in the sample were ranked in order from lowest to highest. Measurements were taken at three points: the 25th percentile or the 117th site in the distribution; the median or the halfway point in the distribution; and the 75th percentile or 351st site in the distribution.

The sites in the 25th percentile have a lower cost recovery but they are improving at a greater rate (2.6 percentage points) than at the median (+1.8) and the 75th percentile (+1.5). The key message is that at the 50th percentile (or median), the cost recovery rate has improved by 1.8 percentage points to 100%, or breakeven. In simple terms, this finding means that half of the sites in the sample perform at breakeven or better, with the remaining 50% of sites operating at a loss. This analysis reveals the highly marginal nature of operating public sport and leisure facilities in financial terms.

Figure 5.1 Cost recovery rates (%) 2023/24 to 2024/25



⁵ Cost recovery is a ratio which measures the extent to which a facility recovers its costs with its income. Breakeven, where cost equals income would give a cost recovery rate of 100%. Cost recovery scores below 100% indicate operating at a loss (or deficit), whereas scores over 100% indicate operating at a profit (or surplus).

A strong positive finding is that between 2023/24 and 2024/25 cost recovery rates have improved at all quartiles, which points to an industry that has become more efficient financially. This achievement also needs to be considered in the context of the financial headwinds that the industry has faced. The increase in minimum wage has led to an increase in staff costs, which typically form the highest percentage of total cost. On average staff costs rose by 10% across all sites as shown in Figure 5.2. A further challenge to note moving forward will be the increase in employers' National Insurance Contributions (NICs).

Offsetting the headwinds to some extent have been further reductions in energy costs and the injection into the industry of the Swimming Pool Support Fund. Figure 5.3 shows the continued reduction in utility costs following the high prices recorded in the energy crisis. It is worth noting that although the decrease in utility costs is identical to the increase in staffing costs at 10%, in absolute terms staffing costs are typically four times greater than utility costs. Thus, only around 25% of the increase in staffing costs has been offset by the reduction in utility costs.

Figure 5.2 Increases in staff costs 2023/24 to 2024/25

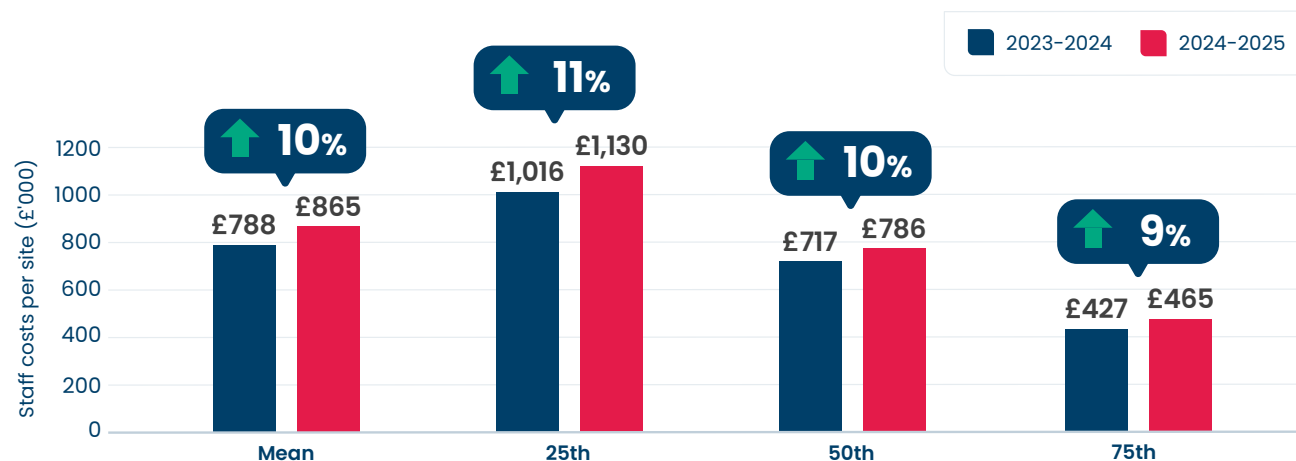
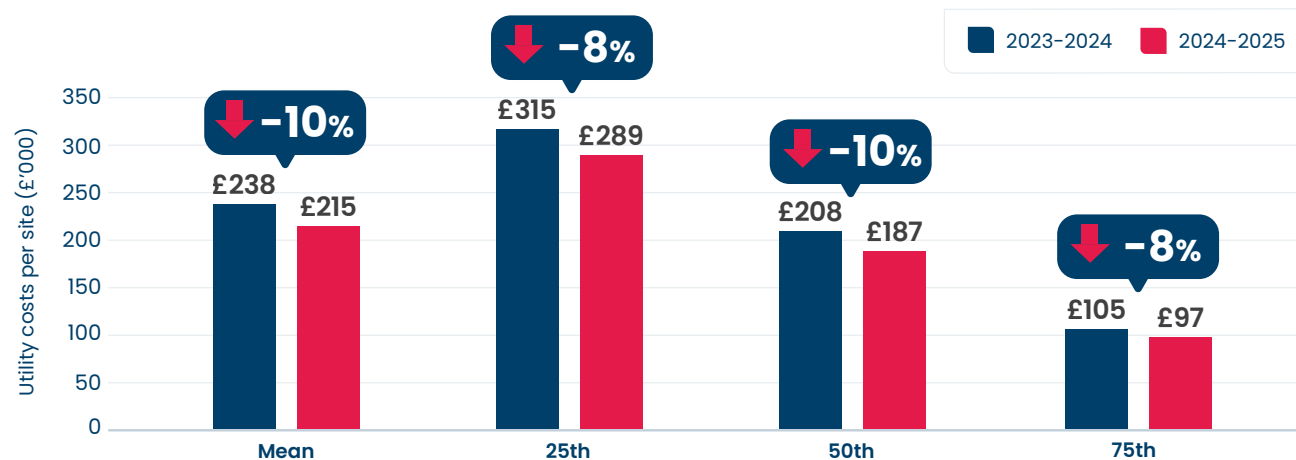


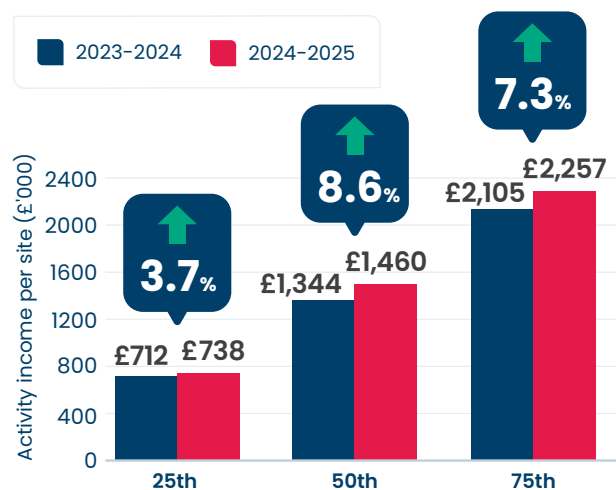
Figure 5.3 Decreases in utility costs 2023/24 to 2024/25



The big picture, however, is that although operating costs have increased overall, income has increased at an even greater rate, such that it has helped to increase the median cost recovery rate from 98% in 2023/24 to 100% in 2024/25.

As public sport and leisure facilities are near 100% fixed cost businesses, the logical approach to improving financial efficiency is to increase income. Figure 5.4 illustrates by how much the 467 facilities have increased their income from activities (or participation fees) over the period 2023/24 to 2024/25.

Figure 5.4 Activity income per site 2023/24 to 2024/25



All three percentiles in the activity income distribution show an increase in income from activities, although this varies by the benchmarks. Sites in the bottom quartile increased income by 3.7%, whereas at the median and above the increase in income ranges from 7.3% to 8.6%.

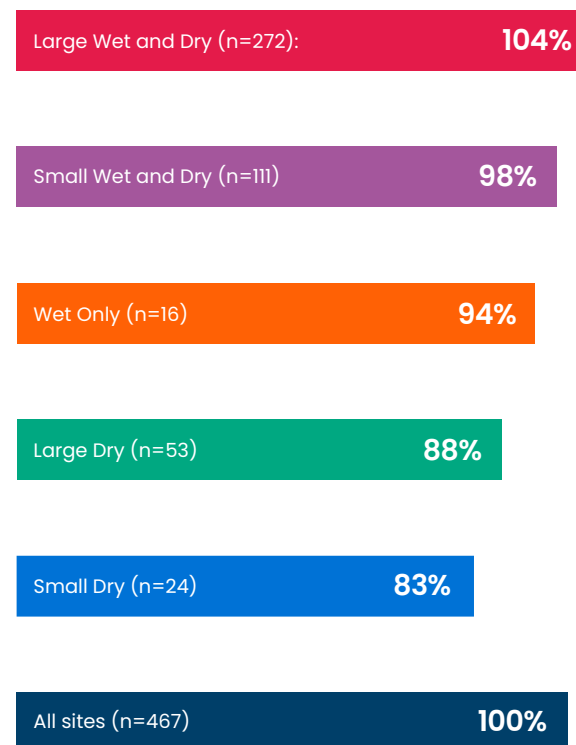
As has been shown in the participation section, throughput and the size of the customer base have barely changed in 2024/25. Therefore, the improvement in income must have been driven largely by increases in price. If this point is accepted, it follows that the customer base has shown considerable financial resilience by virtue of its willingness to absorb such price increases.



Cost recovery rates are not necessarily a function of the quality of onsite management, as there are also structural explanations as to why some sites perform better than others financially. Figure 5.5 provides an analysis of cost recovery rates by facility type to illustrate the point.

Wet and dry facilities, notably large wet and dry facilities (104%), have higher cost recovery rates than all other facility types. This structural advantage is likely to be attributable to economies of scale and the diversity of the offer that can be made. For example, a monthly membership offer that includes fitness activities such as gym and group exercise as well as access to swimming. By contrast, dry facilities, whether they are large or small, have the lowest cost recovery rates (83% to 88%), which may reflect a 'willingness to pay' premium that customers place on swimming.

Figure 5.5 Cost recovery rates (%) by facility type 2024/5

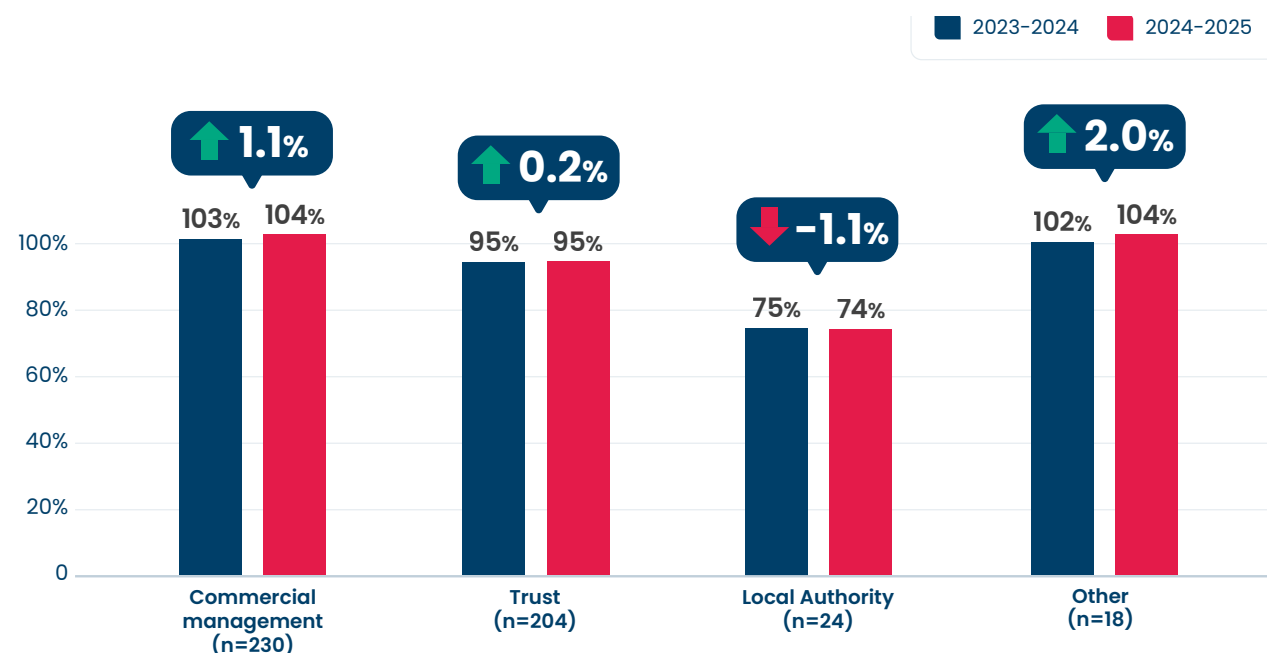


A second structural determinant of the cost recovery is management type whereby some types of management modes tend to perform better than others, as shown in Figure 5.6.

Sites managed by commercial operators had the highest cost recovery rate (104% in 2024/25) which was an increase of one percentage point over 2023/24. We can conclude that it is the financial performance of commercial operators that enabled the Moving Communities sample to have median cost recovery rate of 100%, as sites managed by trusts (95%) and local authorities (74%) have cost recovery rates below 100%.

The sample of sites managed by local authorities (n=24) is modest, but these are the only operators whose cost recovery rate decreased between 2023/24 and 2024/25. This finding is likely to be attributable to having less scope to adjust operating procedures in response to the increased employment costs and greater reticence to increase prices.

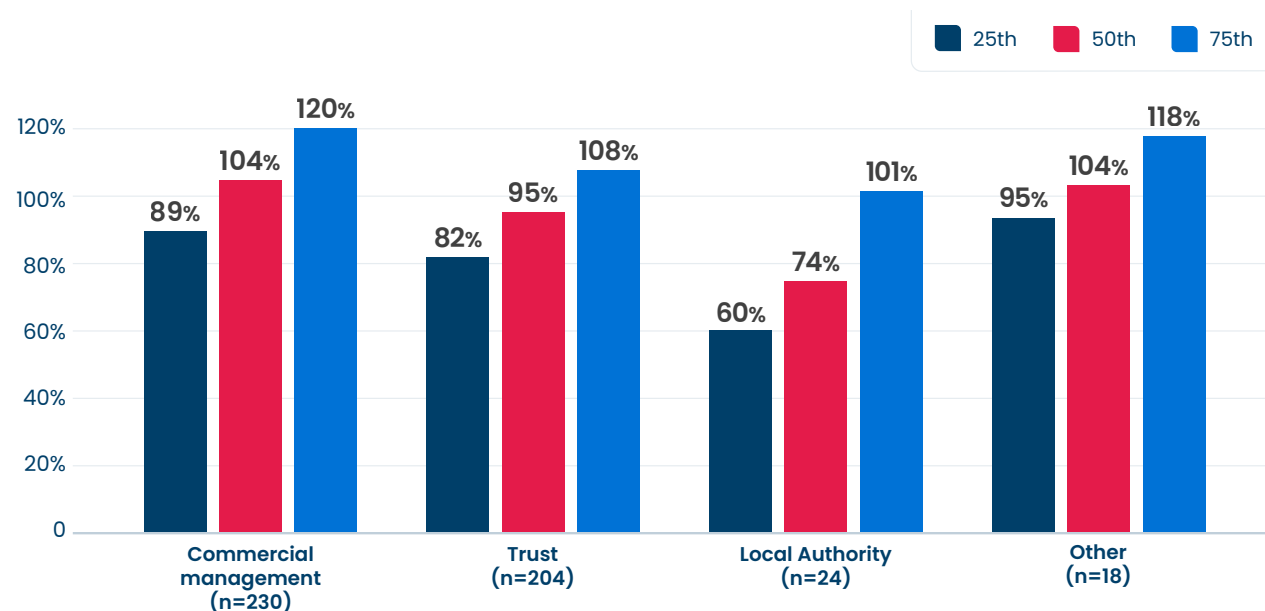
Figure 5.6 Median cost recovery rate (%) by management type



Even within management types there are significant variations in the financial efficiency achieved by operators. As shown in Figure 5.7, all operator types are capable of running facilities at breakeven or better because at the 75th percentile they all have cost recovery rates greater than 100%. This finding means that for all management types, the top 25% of their facilities operate at a surplus.

However, the interquartile range, which is the difference between the 75th percentile and the 25th percentile, reveals that there is considerable variation in the cost recovery scores achieved by facilities within the same family type. Local Authority sites have the highest interquartile range (41 percentage points) with Commercial Management sites the next highest at 31 percentage points. By contrast there is less variability amongst 'Other' management types (23) and Trusts (26). Explanations for these variances will lie in various combinations of: the type of facility; age and condition of facilities; level of competition locally; demographic make up of the catchment area; business model; and the quality and motivation of management and staff.

Figure 5.7 Cost recovery rates (%) by management type 2024/25



The importance of managing financial efficiency can be appreciated by looking at the difference in performance by quartiles as shown in Figure 5.8.

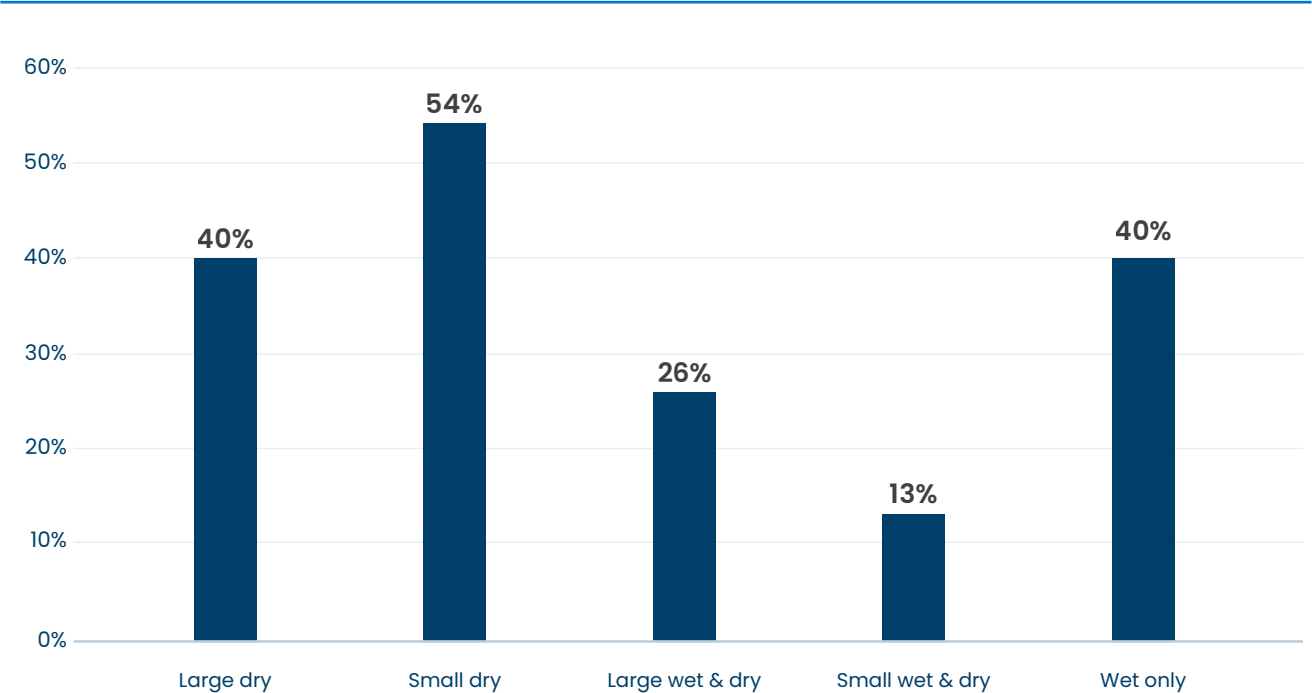
Sites that were in the bottom quartile in 2023/24 have reduced operating deficits by £31,513 in 2024/25. At the median level sites have improved by £24,299, moving from a small loss to breaking even, whilst sites in the top quartile have improved by £66,001. These findings show how a small change in relative efficiency can have a significant impact on the ‘bottom line’ in absolute terms. In 2024/25 any facility that could improve its financial performance from the 25th percentile to the median would improve its cost recovery rate from 85% to 100%, which in turn would convert a loss of £144,261 into a breakeven position.

When looking at centres by their year of construction or significant refurbishment, all facility types built or significantly refurbished in the last 10 years generated at least 13% more income per site in 2024/25 relative to centres built more than 10 years ago. Large wet and dry sites less than 10 years old achieved 26% more income per site compared with similar centres that are more than 10 years old.

Figure 5.8 Subsidy or surplus per site by quartile 2023/24 to 2024/25

Subsidy / Surplus Per site	25th	50th	75th
23-24	-£175,774	-£24,299	£150,898
24-25	-£144,261	£0	£216,899
Change	+£31,513	+£24,299	+£66,001

Figure 5.9 Percentage difference in income per site by facility type for a facility that is less than 10 years old compared to a facility that is 10+years old in 2024/25 (n = 465 sites)



Section 6

Quest

Sport England's Quest service, delivered by Right Directions, is a well-established continuous improvement tool for leisure facilities, supporting partners to identify and prioritise opportunities to enhance the quality of their services and facilities.



**THE ACTIVE
STANDARD**



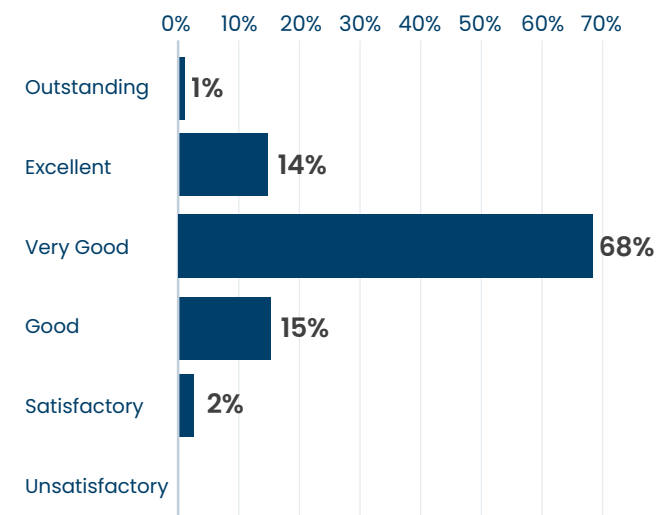
Quest draws on the expertise of highly qualified assessors with extensive sector knowledge alongside mystery visits and independent reviews to recognise local delivery and provide a national accreditation.

Quest works in parallel with the Active Standard (also known as TAS), which is a foundational quality mark focused on health and safety compliance for fitness and leisure facilities, developed by ukactive and its partners. The Active Standard forms the foundation of an operator's journey to improve standards and reduce risks, which is then elevated through the Quest service.

At the end of March 2025, 54 site assessments had been completed for TAS, representing samples from 15 fitness and leisure operators in both public and private sectors. A further 29 operators have also received The Active Standard certification based on their pre-existing compliance with Quest. The number of assessments continues to grow with further engagement from ukactive members.

Over 2024, a total of 324 Quest assessments were completed, involving more than 115 local authorities. Leisure facilities were evaluated, scored, and awarded one of the following bandings: Outstanding, Excellent, Very Good, Good, Satisfactory, or Unsatisfactory. Over this period, 68% of sites achieved a 'Very Good' rating in their overall assessment, while 14% were awarded 'Excellent.' This profile reflects a continued upward trend and positive recovery towards pre-Covid levels when 77% of sites were rated 'Very Good' and 17% achieved 'Excellent'.

Figure 6.1 Quest banding from 324 assessments



Quest assessments consist of a series of core and choice modules. Core modules focus on establishing fundamental elements essential to driving operational quality. Choice modules enable facilities to

customise an assessment to align with specific operations. For instance, available choice modules encompass areas such as Ice Rinks, Event Management, and Fitness Suites, along with various engagement-

focused modules. A breakdown of scores in core modules in 2023 and 2024 is presented in Figure 6.2.

Figure 6.2 Core Quest module scores in 2023 to 2024

Module	Excellent		Very good		Good		Satisfactory		Unsatisfactory	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Customer Journey	12%	8%	53%	58%	31%	31%	4%	3%	0%	0%
Operational Management	13%	13%	51%	53%	32%	31%	4%	3%	0%	0%
Environmental Management	10%	9%	43%	46%	34%	35%	13%	10%	0%	0%
Tackling Inequalities	8%	11%	50%	54%	30%	28%	12%	6%	0%	1%
Managing the Team	16%	34%	55%	54%	27%	10%	2%	2%	0%	0%
Planning to Improve	37%	43%	34%	41%	19%	11%	8%	4%	2%	0%
Mystery Visit	19%	23%	42%	42%	30%	29%	8%	6%	1%	0%

 Bold green text indicates key areas of improvement.

Core and choice modules

Consistently high standards

Modules such as “Customer Journey” and “Operational Management” continued to demonstrate excellence, with over **50%** of facilities receiving a “Very Good” rating. This finding indicates a strong emphasis on customer experience and operational efficiency.

Opportunities for improvement

The “Environmental Management” module had the highest percentage of “Satisfactory” scores (10%), suggesting a need for enhanced sustainability efforts. Steady progress has been seen in the “Tackling Inequalities” module with more facilities delivering programmes and services that truly reflect the diversity of their communities. This module recorded the highest proportion of “Unsatisfactory” ratings (1%).

Strongest performance areas

“Managing the Team” and “Planning to Improve” were the highest performing modules. 34% of facilities achieved an “Excellent” rating in “Managing the Team,” while “Planning to Improve” had the highest proportion of “Excellent” scores at 43%. These results reflect a proactive approach to leadership, strategic planning, and continuous development.

Minimal underperformance

Encouragingly, “Unsatisfactory” ratings were rare across all modules, reinforcing that most facilities are meeting or exceeding expected standards.

Read the full Quest Annual Report 2024 here:

[Read Report →](#)



Section 7

Customer experience

Every year, Moving Communities administers a Customer Experience survey with the support of local authorities and leisure facility operating partners to gather feedback from users who visited the site in the last month about their experience at the centre.



This survey is the largest survey of its kind in the sector and gives a detailed annual overview of the customer experience across public leisure facilities in England.

It should be noted that the number of survey responses varied per site, suggesting that the survey findings may be influenced to some extent by sites with a higher number of responses. Although some questions have a lower response rate, all questions have a minimum of 34,000 responses. Furthermore, proportionately more females and older users have completed the survey. This section of the report should therefore be interpreted with these caveats in mind.

Figure 7.1 Number of sites and total responses to the customer experience survey in 2024/25

2024	2025
 158 Local Authorities	 180 Local Authorities
 560 sites	 688 sites
	54% Trust 30% Commercial management 13% Local Authority 3% Other
 43,602 responses	 76,904 responses



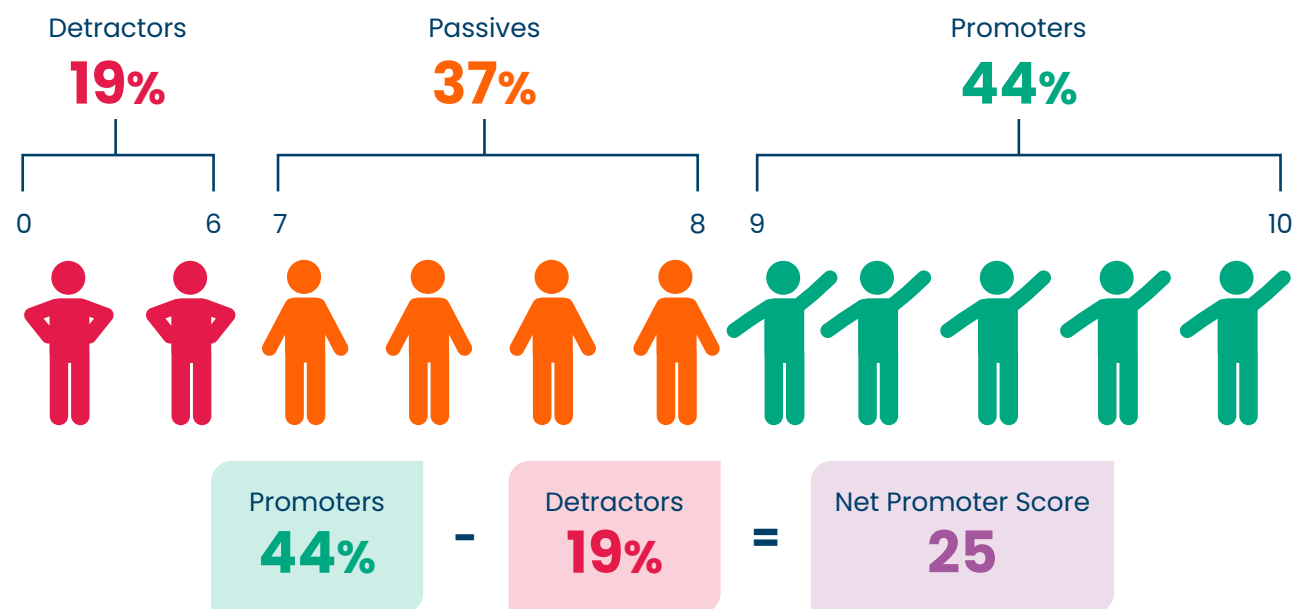
Net Promoter Score

Net Promoter Score (NPS) is a market research metric that is based on a survey question asking respondents to rate the likelihood that they would recommend a company, product, or service to a friend or colleague. The NPS subdivides respondents into “promoters” who provide ratings of 9 or 10, “passives” who provide ratings of 7 or 8, and “detractors” who provide ratings of 0 to 6.

Calculating the NPS involves subtracting the percentage of detractors from the percentage of promoters identified by the survey. The higher the NPS, the better and it is typically interpreted as an indicator of customer loyalty or satisfaction and in some cases, is argued to correlate with revenue growth relative to competitors within an industry.

Figure 7.2 Net Promoter Score 2025

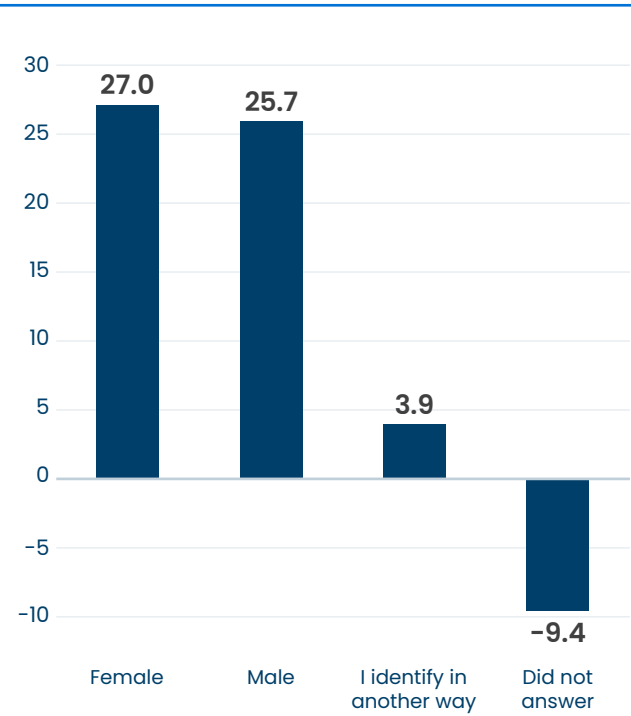
The Net Promoter Score was 28 in the 2024 Customer Experience survey but has now fallen to **25** in 2025 based on 76,904 responses. Net Promoter Scores range from a minimum of -100 and +100. Scores of between -100 to 0 are diagnosed as ‘in need of improvement’; 1-30 is ‘good’; 31-70 is ‘great’ and 71+ is ‘excellent’. With an overall score of +25 the customer experience score for public sport and leisure facilities in 2025 can be summarised as ‘good’. The highest score recorded using this survey was 35 in October 2021, but it declined post-Covid and is yet to recover fully.



Gender

Users who answered “I identify in another way” had a lower NPS than those answering male or female which is driven by the higher number of detractors in this group. However, this should be treated with caution as this is a small sample size. The difference in NPS between females and males is statistically significant.

Figure 7.3 Net Promoter Score by gender 2025

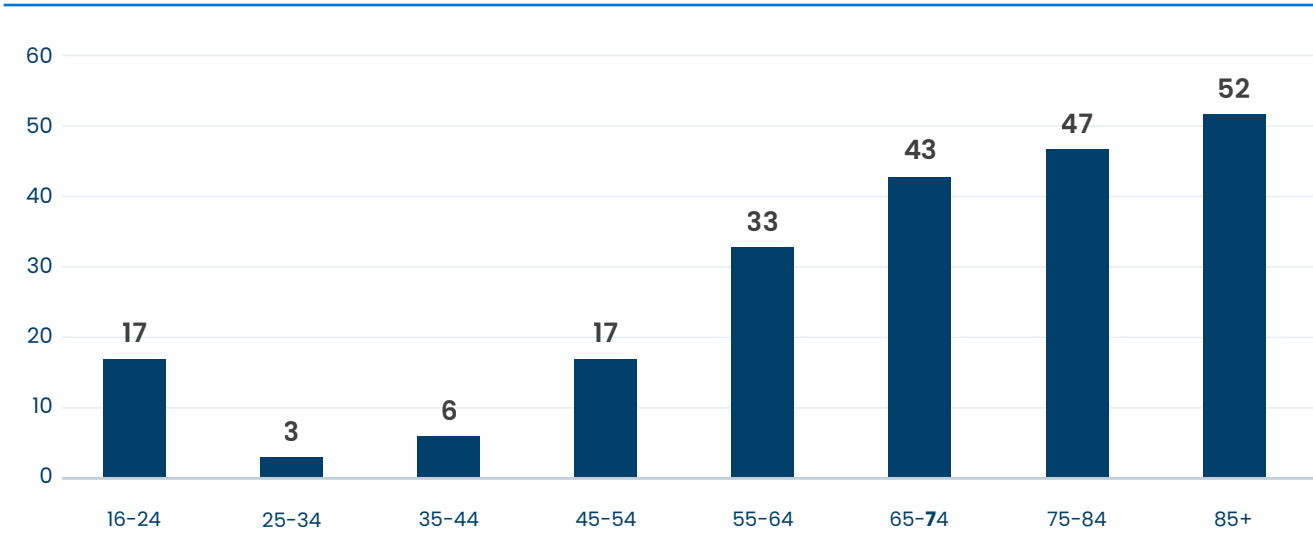


Number of responses = 76,904

Age

There is a general upward trend in NPS in older age groups being almost double the national figure. This is driven by the significantly higher percentage of detractors among the younger age groups and a significantly higher promoter percentage for over 55’s.

Figure 7.4 Net Promoter Score by age 2025



Number of responses = 76,904



Satisfaction

Users were asked about the level of satisfaction with their overall experience*. An average of 75% of all respondents stated they were either quite satisfied or very satisfied with their overall experience.

19% of users who identify in another way on the gender analysis were dissatisfied or very dissatisfied with the service, which is the highest level of dissatisfaction across the sub groups of age and gender.

	All respondents	Female	I identify in another way	Male
Dissatisfied very dissatisfied	10%	9%	19%	11%
Neither satisfied nor dissatisfied	15%	15%	12%	14%
Quite satisfied/ very satisfied	75%	75%	69%	75%

Satisfaction was highest among older age groups with up to 81% of users aged 65–74 reporting high satisfaction.

	All respondents	16–24	25–34	35–44	45–54	55–64	65–74	75–84	85+
Dissatisfied/ very dissatisfied	10%	7%	11%	13%	11%	9%	8%	10%	13%
Neither satisfied nor dissatisfied	15%	15%	21%	20%	18%	14%	6%	9%	9%
Quite satisfied/ very satisfied	75%	77%	68%	67%	71%	77%	81%	81%	78%

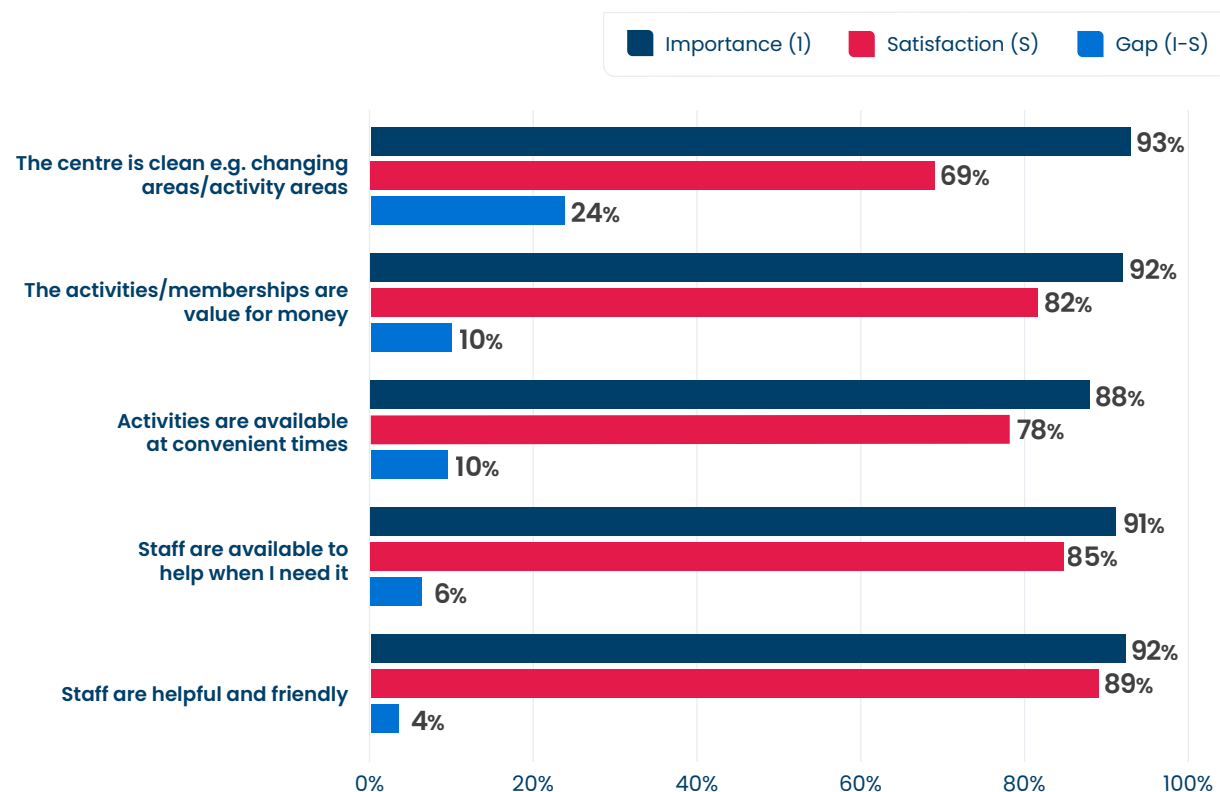
* The darker colour shows an equal or higher % for a gender/age category compared to the % given by all respondents, lighter colour shows a lower % for a gender/age category to the % given by all respondents. While the coloured blocks illustrate scoring differences, these do not inherently indicate statistically significant variation.

Service attributes

The survey also asked users to rate service attributes in order of importance and satisfaction. Staff being helpful/friendly and cleanliness were the two most important factors to the sample when thinking about visiting a leisure facility, which has been a consistent pattern over the last three years. The need for activities/memberships to provide value for money was the third most important attribute.

Addressing attributes with wide gaps between importance and satisfaction is key to improving services. Staff being helpful/friendly was the most satisfactory element relating to the leisure centre experience, with 89% of the sample agreeing that they were either Very or Quite Satisfied. The main 'gap' between importance and satisfaction is for cleanliness, where there is a 24 percentage point gap between how important it is to customers and how well it is being delivered in practice. It is interesting that this gap has decreased by 9 percentage points from 2024 when it was 33%, suggesting an improvement in cleanliness throughout the sector.

Figure 7.5 Top 5 service attribute gaps: importance v satisfaction



Digital journey

New questions were added to the 2025 survey on the “digital journey” that customers increasingly experience. 87% of customers said it was important that activities were easy to book online, with 31% using digital services to find information prior to their most recent visit. Most people (80%) use the centre website to find information, with 8% using a search engine and 5% using the local authority website. 82% booked their activity online before attending.



Higher Online Booking in 45+ Age Group

% of respondents aged 45+ booking online: **83% to 87%**, above overall average of 82%.



Higher Female Online Engagement

More females **used online services and made bookings online** than males (**35% v 25%; 85% v 76%**).



Lower Online Booking in Under 45 Group

% of respondents aged <45 booking online: **66% to 71%**



Increased online research by gender-diverse younger participants

Younger people (**16–24**) ‘**identified in another way**’ show significantly higher rates of online research (**%36 v males (7%) and females (13%)**).

User perception

In 2025, two new questions were introduced to understand better users' perceptions of their local leisure centres. The results were positive and reinforced the vital role of these assets as inclusive, welcoming, and safe community hubs that bring people together in a place.

- **85%** agree that their leisure centre is inclusive and welcoming
- **85%** see people similar to themselves at their leisure centre
- **92%** of respondents feel safe using the leisure centre at their preferred times

There are some significant differences between the responses from different age groups and gender groups. There was significantly higher agreement among (16–24) and (65+) age groups around centres being inclusive and welcoming and older respondents (45+) reported higher agreement with seeing similar people to themselves and feeling safe. There was higher agreement among females than males (86% vs 83%) reporting seeing similar people to themselves at their leisure centres.

Figure 7.6 User perceptions by age groups 2025

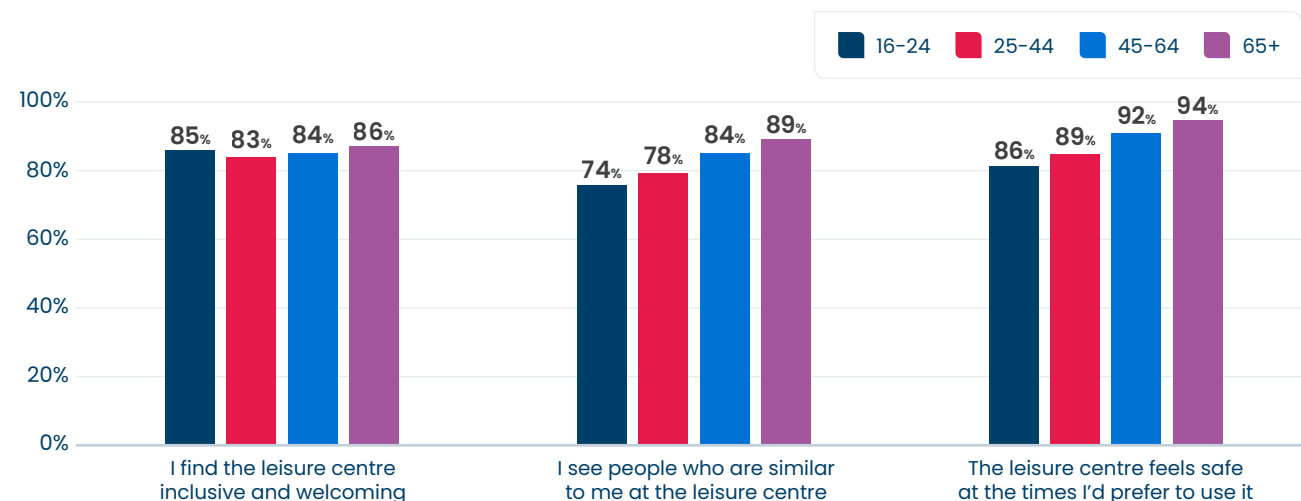
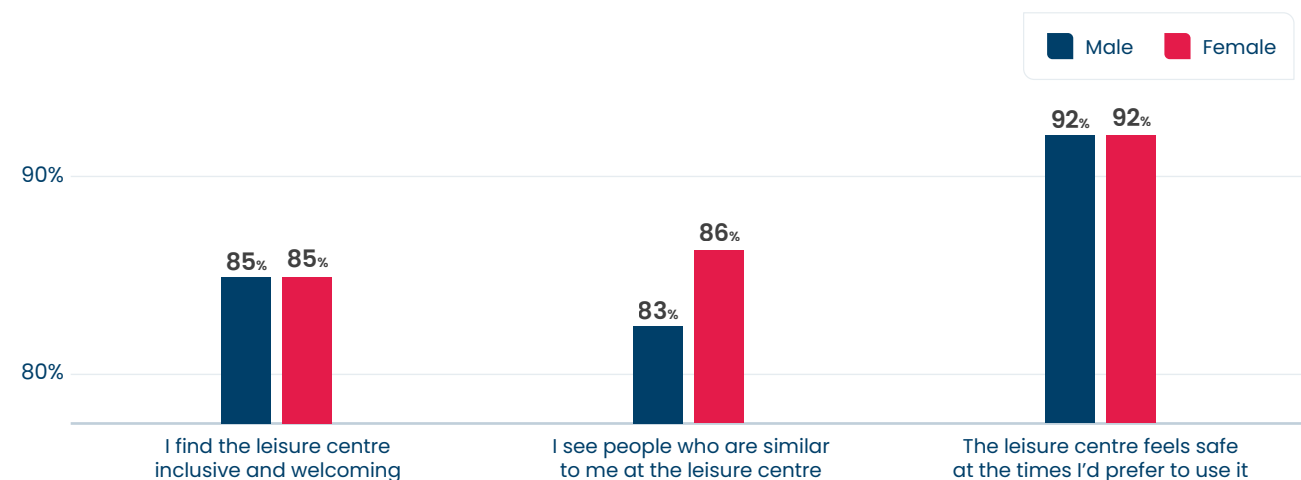


Figure 7.7 User perceptions by gender 2025



This finding correlated with the wider consumer insight panel which asks over 60,000 adults in England a series of questions online throughout the year to capture a snap-shot of what the general population thinks about physical activity and active wellbeing.

Section 8

Data Lens

Moving Communities works collaboratively with [CIMSPA](#) and its [Data Lens platform](#) to build a detailed picture of workforce trends across the sport and physical activity sector. Drawing on real-time data from job postings, professional profiles, and traditional labour market sources, we can better understand sector recruitment and the evolving skills landscape.

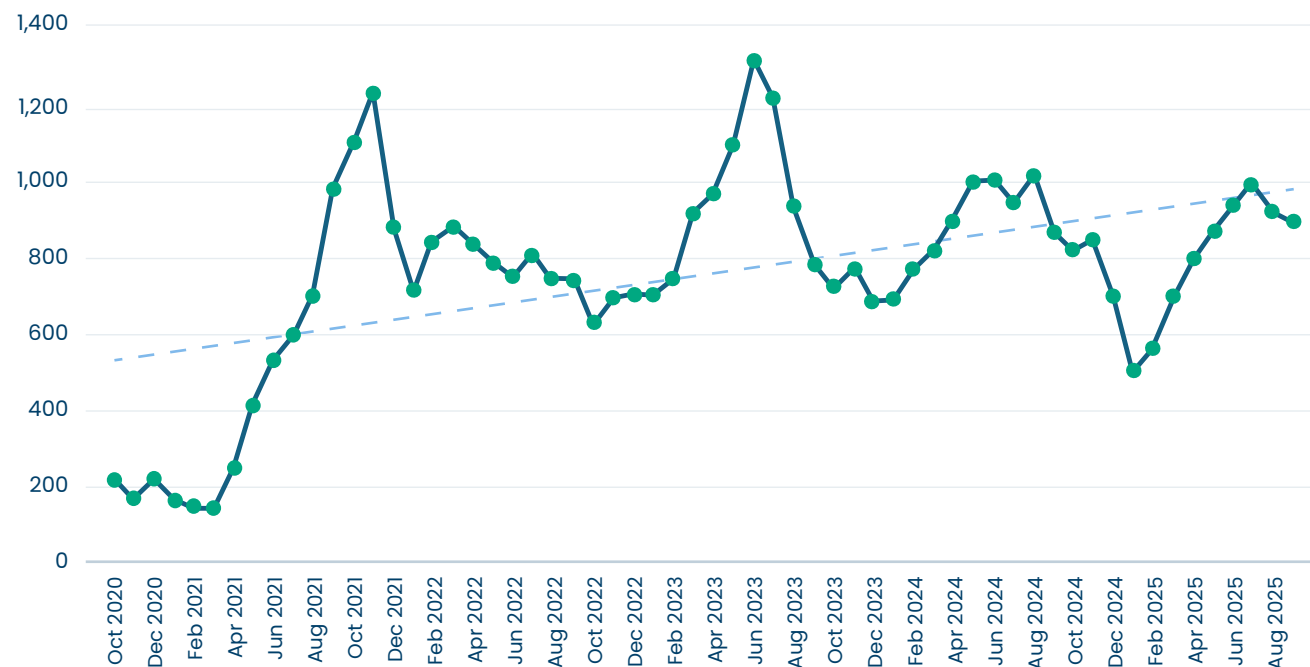


Job postings

Longer-term data shows consistent growth in job postings since 2020. Overall, recruitment levels for Moving Communities sites on Data Lens remain stable and buoyant.

Analysis of job postings across Moving Communities sites on Data Lens shows a slight decrease in recruitment activity following a period of sustained growth. Between April 2024 – March 2025, there were 4,789 job postings, representing a 5% decrease in recruitment activity compared to the previous financial year. It is likely that this reflects labour market stabilisation following a surge in demand, though this may indicate a reluctance of employers in light of increased National Insurance Contributions from April 2025 and living wage increases to fill roles. It could also indicate that organisations are retaining a higher proportion of their staff and therefore do not need to recruit as often.

Figure 8.1 Number of job postings 2020 to 2025



It is important to note that the dip in late-2024 was likely caused by updates to the Data Lens platform rather than a genuine reduction in recruitment activity.



Average advertised salaries

Advertised salary data from the past 12 months indicates continued variation across key sector roles. 'Sports Coaches, Instructors, and Officials' remain the jobs with the highest advertised salary, with a median advertised salary of £29,200 per year. This figure reflects employers' recognition of the expertise and front-facing skills required for these roles.

In comparison, 'Leisure and Sport Managers and Proprietors' recorded a slightly lower average of £25,300 per annum. This finding likely reflects the inclusion of a broad range of management positions, including junior manager roles and senior manager roles that may not advertise a salary, which reduces the median score. Managerial roles continue to offer strong career pathways, underscoring the importance of leadership across the sector.

Figure 8.2 Advertised salaries by key sector roles

	No. of unique job postings (April 2024 – March 2025)	Advertised median salary
Fitness and Wellbeing Instructors	1,351	£27,300
Sports coaches, instructors and officials	1,556	£29,200
Leisure and Sport Managers and Proprietors	196	£25,300
Sports and leisure assistants	1,674	£23,700





CIMSPA references in job postings

References to CIMSPA membership, affiliation, or qualifications within job postings continue to appear frequently, reflecting continued recognition of CIMSPA's work and the value of professional accreditation. Employers are increasingly seeking candidates who demonstrate professional affiliation with CIMSPA, reinforcing the sector's ongoing professionalisation and the role CIMSPA plays in maintaining workforce standards.

Skills insights

Skills data continues to demonstrate the broad and adaptable nature of the sector's workforce. Common skills, such as communication, teamwork, and customer service, remain regularly listed in sector job postings, reflecting the sector's participant-focussed nature. Specialist skills, such as lifeguarding and coaching continue to feature prominently, indicating sustained demand for technical proficiency and competency to ensure the safety of both participant and deliverer. It remains the case that employers regularly list diverse skills within job postings to reflect the multi-faceted, and often amalgamated, roles

that the sector's workforce occupy. Well-rounded individuals who possess a range of common or transferable skills can meet the multiple needs of clients and customers and can therefore increase customer satisfaction and retention.

Access to CIMSPA Data Lens is an included benefit for all CIMSPA Partners and Sport England System Partners and is available for non-partners for an annual licence fee.

[Click here to register →](#)

Board members



Dr Jon Argent
Chair of [Moving Communities](#)

An experienced strategic leader in the sport, physical activity, leisure and wellbeing sectors.



Richard Boardman
Head of Research and Development at [Sport and Recreation Alliance](#)

An independent representative body for grassroots community sport and recreation in the UK.



Adam Blaze
CEO of [Activity Alliance](#)

The national charity for disabled people in sport and activity.



Debbie Johns
Head of Performance Networks at [Association for Public Service Excellence](#)

A not-for-profit unincorporated association working with over 300 councils promoting excellence in frontline public services.



Dr Matthew Wade
Head of Research and Development at [ukactive](#)

A not-for-profit industry association for commercial gyms, independent operators and community leisure centres.



Samantha Ramanah
Adviser at the [Local Government Association](#)

The national membership body for local authorities in England and Wales.



Rachel Sim

Project and Research Officer at [Community Leisure UK](#)

The members' association representing charitable leisure and culture trusts across England, Scotland, and Wales.



Penny Greenwood-Pearsons

Executive Officer at [CLOA \(Chief Cultural & Leisure Officers Association\)](#)

The professional association for strategic leaders in public sector cultural and leisure services.



Phil Wright

Head of Insight & Business Transformation at [CIMSPA \(Chartered Institute for the Management of Sport and Physical Activity\)](#)

The professional development body for the UK's sport and physical activity sector.



Kevin Mills

Director of Place Development at [Sport England](#)

An arms-length body under the Department for Culture, Media and Sport responsible for growing and developing grassroots sport and getting more people active across England.



Andy Taylor

CEO of the [Active Partnership Network](#)

A network of 42 Active Partnerships which are locally led, non-profit, strategic organisations, bringing together people and organisations to increase physical activity levels.



Glossary

Facility types are defined as:

Term	Definition
Wet only	Only swimming pools are present on the site.
Small wet & dry	At least one swimming pool and up to three other facility types.
Large wet & dry	At least one swimming pool and four or more other facility types.
Small dry	Up to three facility types and no swimming pool.
Large dry	Four or more facility types and no swimming pool.

Management types are defined as:

Term	Definition
Local authority (in house)	Managed by local authority using their own staff.
Trust	Charitable Trust set up to run public sport and leisure facilities. Some local authorities have established leisure trusts to run their leisure centres. These Trusts benefit from charitable status and work outside the local authority structure. The local authority remains the owner of the facility.
Commercial management	Where the facility is managed by a commercial company, such as commercial health clubs. There are also commercial management operators which have been contracted in to manage local authority leisure centres.
Other	Any other management types (e.g. community organisation, school/college/university (in house), 'other' as defined in Active Places Database).

Social value uses the following definitions:

Term	Definition
Attributable (net) social value	The proportion of social value directly attributable to activities that take place within leisure centres.
Wellbeing Value /Primary value	Direct value to individuals of improved wellbeing.
Wider health value /Secondary value	Wider value to society, including the state, of changes in health outcomes.
WELLBY	Wellbeing-adjusted Life Year

Other terms used in the report which require definition are:

Term	Definition
Utility costs	Costs associated with gas, electricity, water and other types of alternative energy.

Term	Definition
Outdoor Activities	Including but not limited to American Football, Archery, Athletics, Baseball, Outdoor bowls, Outdoor cricket, Cycling, Outdoor football, Hockey, Lacrosse, Outdoor netball, Rounders, Rugby, Outdoor tennis, Walking, Water sports, Softball, Winter sports, Outdoor adventure activities, Running.



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November 2025