Customer Experience Survey 2025
National Report

Produced by: Mike Hill - *Active Insight* and Shia Ping Kung - *Sheffield Hallam University*

Content

Introduction

The Moving Communities Customer Experience Survey was carried out over a 19-week period from June to October 2025, using an online questionnaire distributed by 182 participating local authorities and 173 operators via email. Email invitations were sent to any member or customer on their database who had attended their leisure centre in the last month. The sample was therefore self-selecting, and the results have not been weighted in any way. It should be noted that the sample is over representative of females and older age groups.

The survey was designed in conjunction with Sport England's insight team and builds on the previous five annual Moving Communities Customer Experience Surveys, as well as similar surveys carried out by the National Benchmarking Service in the early 2000's. It provides an annual snapshot of the "experience" of people using public sector facilities throughout England and is the largest survey of its kind in the sector.

Mike Hill - Active Insight

Context

The Customer Experience Survey is a crucial component of Sport England's Moving Communities service providing valuable insights into the satisfaction and engagement of users of public leisure centres in England. Understanding customer needs and barriers to participation helps tailor programmes to increase activity levels, especially among underrepresented groups. The survey data enables Sport England and the wider sector to evaluate the effectiveness of their initiatives nationally, measure progress toward service provision goals and identify areas for improvement.

For the leisure sector, these insights support the development of targeted, inclusive local services that foster community cohesion and promote healthier lifestyles. Additionally, the survey fosters evidence-based decision-making, helping to allocate resources efficiently and develop impactful policies. Ultimately, it supports community-based sports and leisure activities to remain accessible, engaging, and responsive to local needs, driving long-term growth and participation in sport across communities.

Emma Bernstein - Sport England Strategic Projects Lead

“At Places Leisure, we are committed to creating vibrant, inclusive communities where everyone feels welcome and valued. Participating in the Moving Communities Customer Experience Survey allows us to gain vital insights into the needs and preferences of those we serve. It is important to us because it helps us understand our strengths and identify areas for improvement, ensuring we provide the best possible experience for our members and local communities. We believe that listening to our customers is key to evolving our services and fostering a positive environment. The data collected will be carefully analysed and used to inform our decisions, enhance our programmes, and develop initiatives that truly benefit our community. Ultimately, our goal is to build stronger, healthier communities through continuous feedback and meaningful action.”

Ellouise Wood

Customer Operations Manager Places

“The Moving Communities survey data provides a great opportunity to benchmark our performance against the national average and look at ways in which individual centres can improve product delivery. We use the importance and satisfaction indicators to analyse whether we’re meeting customer expectations and review those metrics over time to spot any trends. The data also provides a natural conversation starting point with Public Health colleagues and helps to show the value of leisure centres in terms of the wider health agenda.“

Alex Muse

Business Development Manager Wiltshire Council

Sample size and implications

This report draws on the largest dataset to date, evidencing customer experiences at sport and leisure facilities registered with Moving Communities. Although the sample is not randomly selected and certain demographic groups may be overrepresented or underrepresented in it, the survey offers a reasonably robust and reliable picture of how facilities are used and experienced. The dataset comprises over 80,000 survey responses from 688 sites across 182 local authorities in England. This large sample enables deeper exploration of subgroups with greater confidence, providing insights into differences across facility types and user profiles. While some demographic groups remain underrepresented, the substantial increase in responses this year is an important step toward building a more balanced and inclusive evidence base.

We are committed to improving representation in future survey iterations, enhancing the reliability of findings, and better reflecting the diversity of users and facilities across the sector. This report marks a milestone in that journey, made possible through the contributions of our partners and stakeholders. Together, these efforts enable Moving Communities to deliver increasingly actionable and trusted insights to help shape better experiences for all.

Shia Ping Kung – SIRC, Sheffield Hallam University - MC Project Research Manager

Key Findings and Insights

Sample profile

Since 2022, the gender split of respondents has remained consistent, **with females being overrepresented at 64%**. Moving Communities analysis of usage of leisure centres over the last 12 months suggests that typically 53% of users are female.

The age profile of the October 2025 survey is very similar to the 2022, 2023, and 2024 surveys, **and remains over representative of older age groups**, when compared with the actual user profile of leisure centres that Moving Communities reports. For example, 47% of our survey's respondents fell into the age group 55 to 74 years old, compared to the 18% that this age group represents of total users in 2025.

The "activity mix" of respondents has changed gradually over the last 4 years, gym usage has increased significantly, reaching 42% in 2025, while swimming participation has steadily declined from 42% in 2022 to 28% in 2025. Fitness class attendance has remained relatively stable, fluctuating between 23% and 30%.

64%

Female Respondents

Satisfaction levels and Net Promoter Score (NPS)

Overall satisfaction levels remain constant and relatively high, with 40% very satisfied and a further 34% quite satisfied. Generally, those aged 55–74 are significantly more satisfied than younger age groups, with the exception of 16–24 year olds.

The overall NPS has decreased slightly to 25, compared to 28 last year. Female respondents score above the national average, with an NPS of 27, while males are also marginally above the national average at 26.

25

Net Promoter Score

down from 28 in 2024

Key Findings and Insights Cont...

What's important to customers and is it being delivered?

Cleanliness, value for money and staff being helpful/friendly were the three most important factors for respondents when thinking about visiting a leisure centre and these have been constant over the last 4 years.

Staff being helpful and friendly was also the most satisfactory element relating to the leisure centre experience, with 88% of the sample agreeing that they were Very or Quite satisfied.

The largest "gap" between Importance and Satisfaction is cleanliness, where there is a gap of 24 percentage points between how important it is to customers and how well it is being delivered.

Satisfaction with the most recent visit is the strongest contributing factor to the NPS, and is shaped by key service attributes such as cleanliness, value for money, and staff friendliness, which together could influence customer loyalty and likelihood to recommend.

Detractors report significantly lower satisfaction than the overall average: 30% were satisfied with their last visit, as compared with 75% of all users. Gaps across specific service attributes range from 22% to 36%, indicating consistently lower ratings among detractors.

Cleanliness
Value for money
Staff being helpful/friendly

Life Satisfaction

Facility users show an average life satisfaction score of 7.8, which is higher than the general UK population average of 7.6.

Higher average life satisfaction was observed with individuals with a greater engagement in physical activity, which highlights a positive association between regular moderate intensity physical activity and perceived life satisfaction. This finding in turn **suggests that there are opportunities to improve subjective well-being through increased participation in sport and physical activity.**

7.8
Average Life Satisfaction Score
(0=not at all satisfied; 10= completely satisfied)

Key Findings and Insights Cont...

Impact of cost-of-living crisis

The impact of the rising cost of living on facility usage remains unchanged from last year, with **31% reporting it has a significant or moderate negative effect** on their use of sports, leisure, and health/fitness facilities.

31%

Negative effect

Online Services

While **only 31% of respondents used online services** to find information before their most recent visit, those who did overwhelmingly relied on the leisure centre's own website (80%). Once engaged, most users booked their session online, with **82% confirming they had made an online booking** before attending.

82%

Booked online

View of the Leisure Centre

A large majority of respondents view the leisure centre positively, with **85% saying it is inclusive and welcoming** and the same proportion **seeing people similar to themselves when using it. 92% feel safe attending at their preferred times.**

85%

Inclusive and welcoming

85%

See people similar to themselves

92%

feel safe attending at their preferred times

Key Findings and Insights Cont...

Environmental sustainability

68% do not have a clear opinion on whether their leisure centre is adequately adapting physical activity options to be more environmentally sustainable.

68%
No clear opinion

'This Girl Can' Campaign

27% of respondents had seen the 'This Girl Can' campaign. Of those who had, **21% reported that it encouraged them** to be more active or to use their local leisure centre.

27%
Saw the campaign

Full Survey Report

This year's survey had the largest dataset ever achieved, with 81,754 responses, across 182 local authorities and 173 operators. 688 leisure centres contributed to the survey dataset, (representing around 30% of the total numbers in England), although the level of response varied greatly between sites. Some questions had a lower response rate than others.

There was a good spread of responses by different management delivery type, which is broadly representative of the total number of different types of operators represented on Moving Communities as a whole, although Trusts are slightly over represented and Commercial Management sites slightly under.

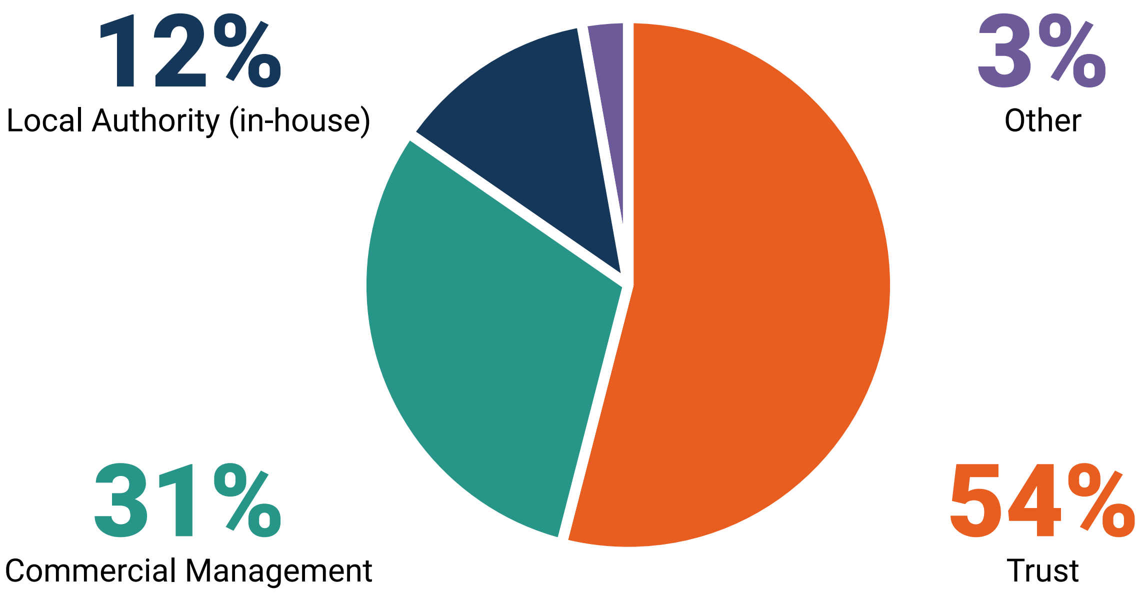
81,754
Respondents

182
Local authorities

688
Sites

173
Operators

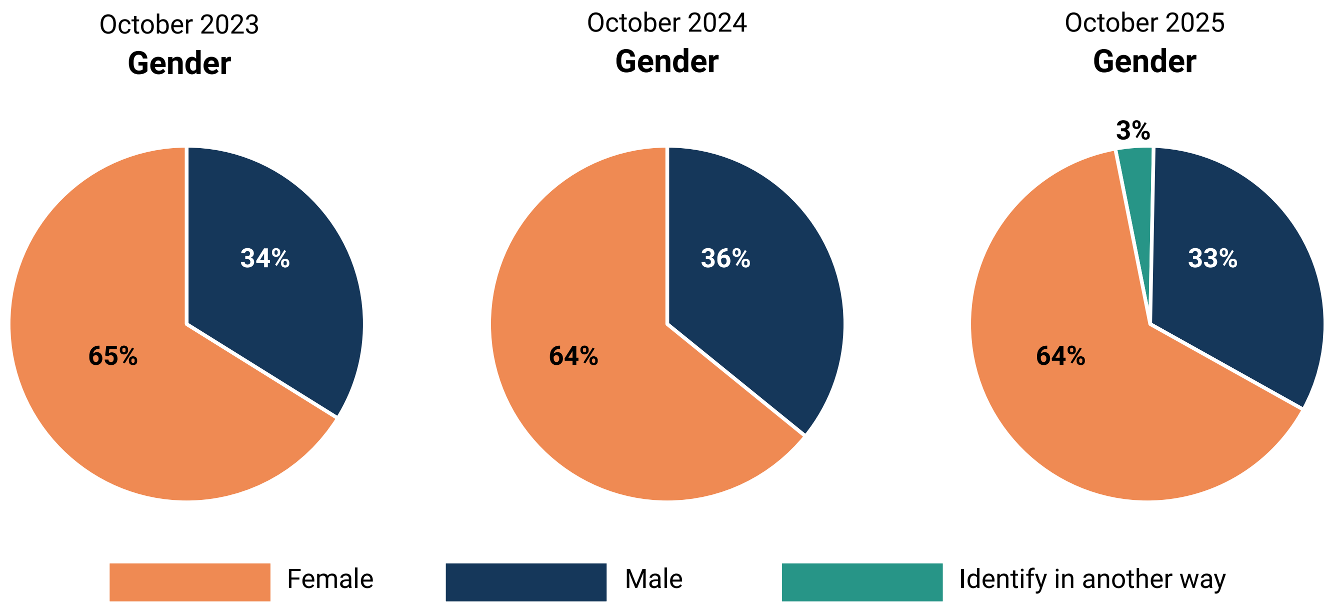
Sites by management type

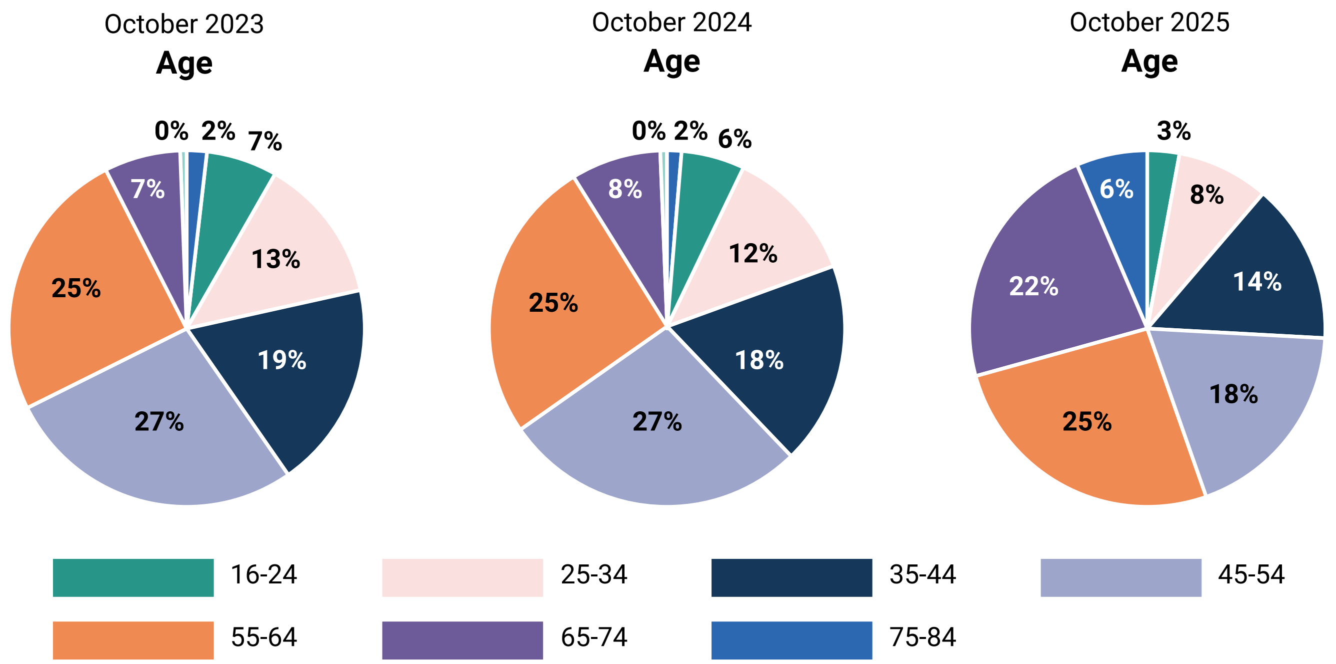


Sample Characteristics

Since 2023 the gender split of respondents has remained consistent, with females being overrepresented at around 64%- 65%. Moving Communities analysis of usage of leisure centres over the last 12 months suggest that 53% of users are typically female.

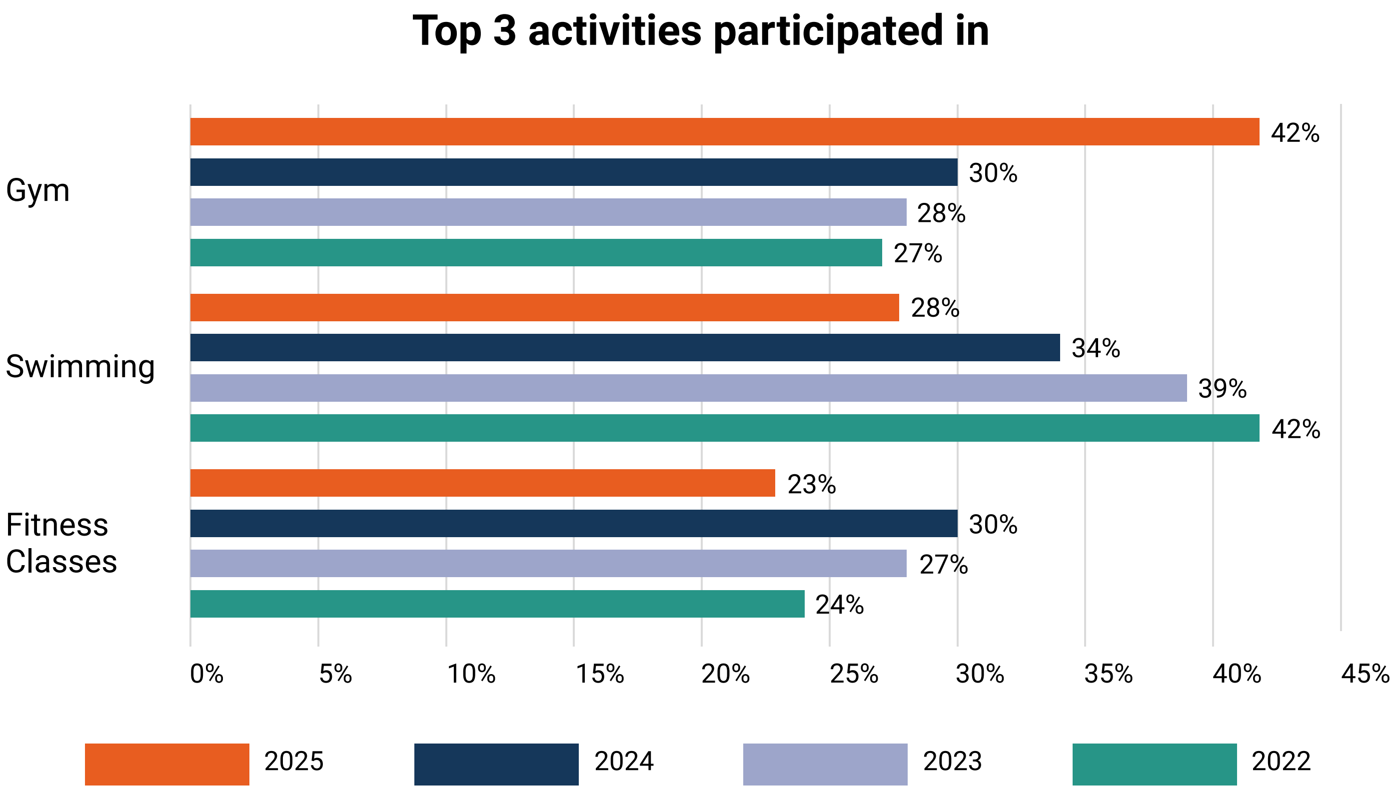
The age profile of the October 2025 survey is very similar to the October 2023 and 2024 survey, i.e. it is still over representative of older age groups when compared to the actual user profile of leisure centres that Moving Communities reports. For example, 47% of our respondents fell into the age group 55 to 74 years old, compared to the 18% that this age group represents of total users.





Since 2024, the main mode of transport to leisure centres has shifted, with an 11 percentage points decrease in those who drive and a 10 percentage points increase in those who walk. The 2025 figures are now more consistent with those recorded in 2022.

Participation patterns have shifted notably in 2025, with gym usage increasing significantly to 42% within the survey sample (up from 30% in 2024), making it the most common activity for the first time in four years. In contrast, participation in swimming has steadily declined from 42% in 2022 to 28% in 2025, while fitness class participation has returned to 2022 levels (23%) after peaking in 2024.

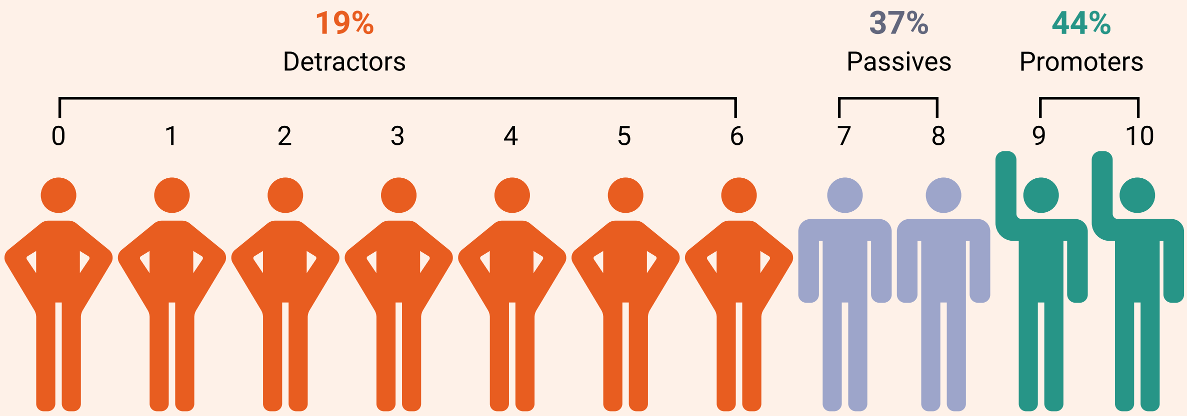


Net Promoter Score

Net Promoter Score (NPS) is an internationally recognised tool for measuring customer satisfaction and loyalty. It is based on asking the following question: “How likely would you be to recommend your centre to a friend or colleague, on a scale of 0 to 10, with 0 being Extremely unlikely and 10 being Extremely likely?” The actual NPS is then calculated using the model below.

Overall Net Promoter Score =

Promoters (9-10)% - Detractors (0-6)%

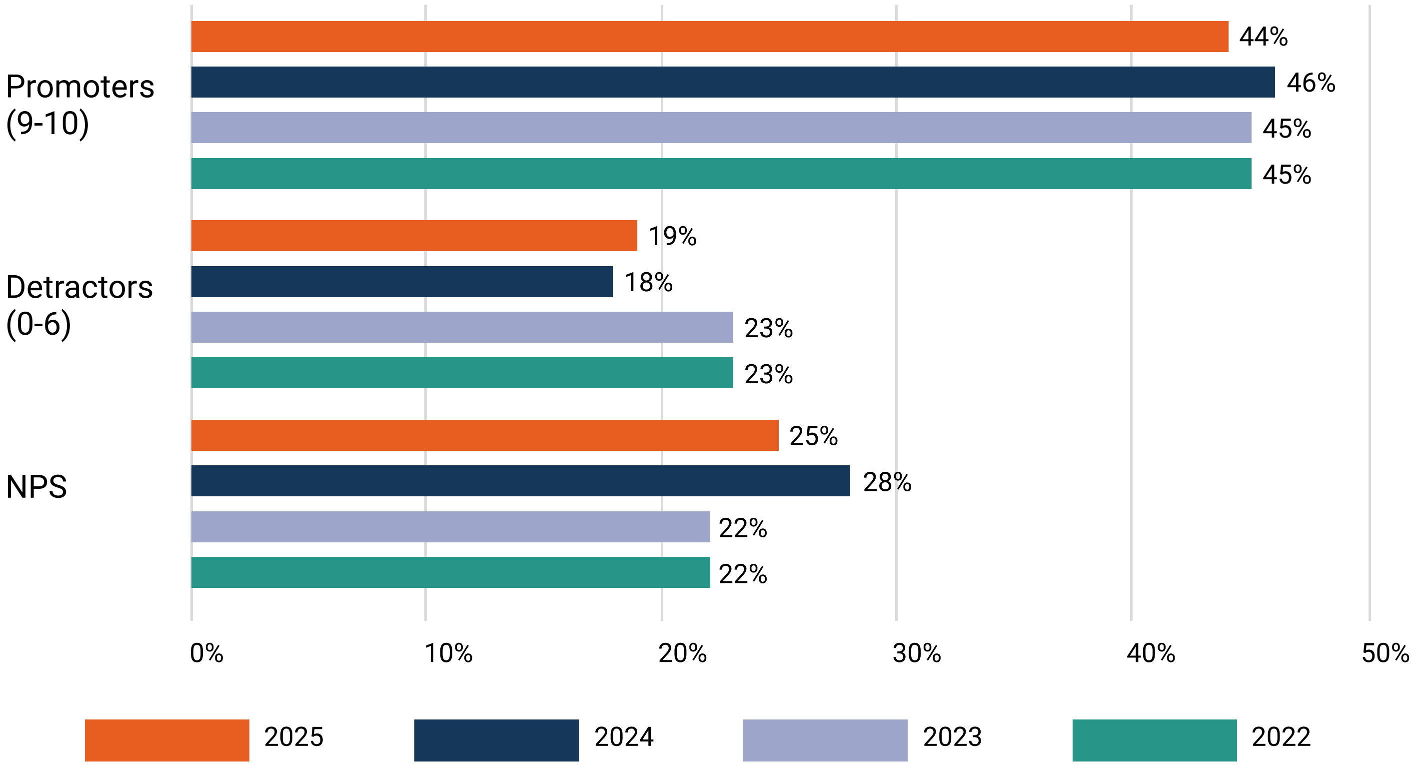


25

Net Promoter Score

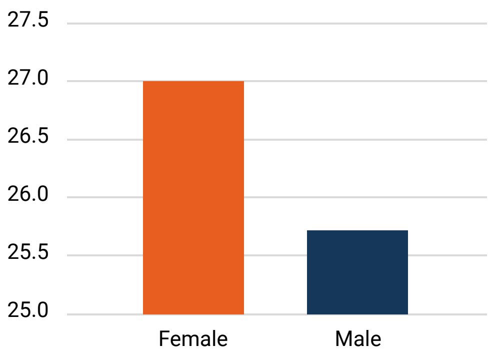
The overall NPS has decreased by 3 since last year, now at 25, but still up since 2022/23 when it was at 22.

Likeliness to recommend leisure centre

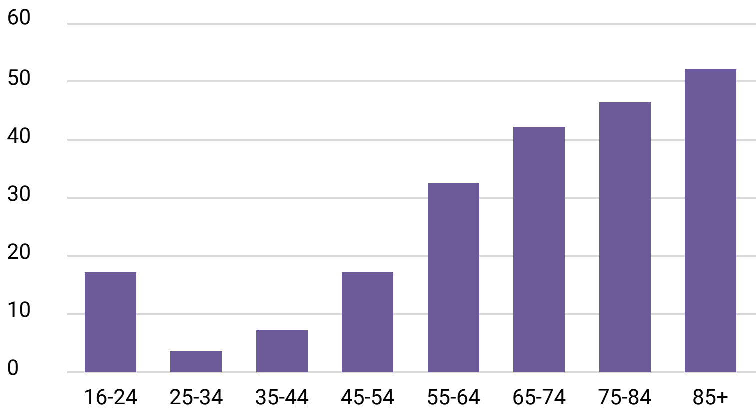


The NPS differs greatly across different demographics, notably across the different age groups. The female NPS is higher than the national average of 25, at 27, while the male NPS is also above the national average, at 26[1]. Females have a significantly higher NPS than males, which is driven primarily by having relatively more promoters in their sub sample.

[1] Respondents who 'identify in another way' for gender are not shown in the breakdown chart because their sample size is relatively small (n = 127, <0.2% of total responses). However, these respondents, along with those who did not answer the gender question, are included in the overall NPS analysis for all users. Notably, their scores are lower than those of both male and female respondents, which contributes to a lower overall average for all users.



	Female	Male
NPS	27.0	25.7



	16-24	25-34	35-44	45-54	55-64	65-74	75-84	85+
NPS	17	3	6	17	33	43	47	52

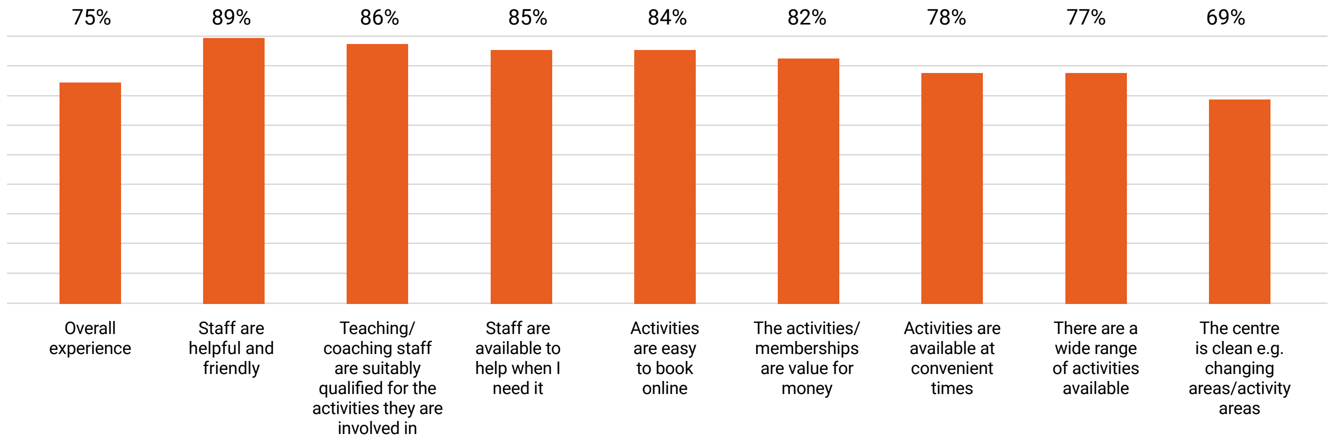
For a more detailed analysis of NPS using various cross-tabulations to provide in-depth insights please refer to Appendix 1.

Satisfaction Levels

In the survey, users are asked about their Overall Satisfaction with their centre and their satisfaction with specific service elements.

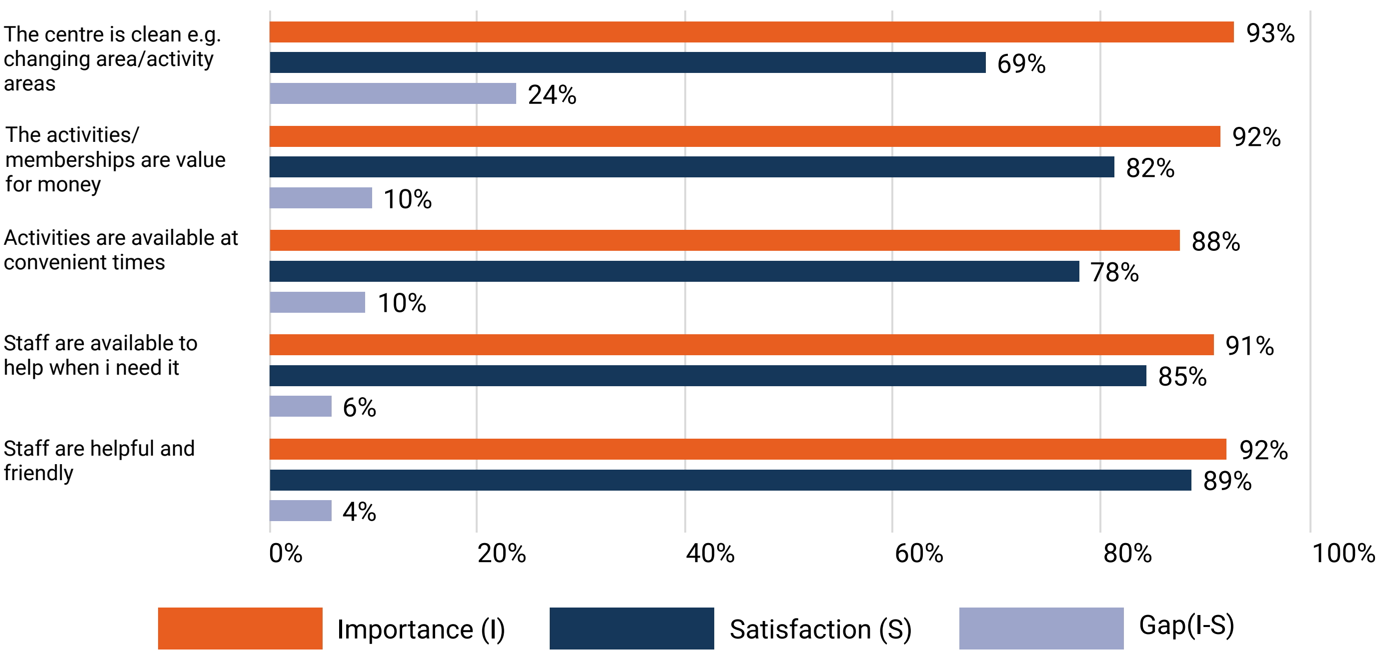
The Overall Satisfaction percentage is calculated by adding together the Satisfied scores and the Very satisfied scores to create a “satisfaction rating”. The overall score was 75% with top three service elements being Staff being helpful and friendly, Teaching/coaching staff being suitably qualified, and Staff are available when I need it. The lowest three elements were Cleanliness, Wide range of activities available, and Activities available at convenient times.

Satisfaction with service attributes



Users were also asked how important these service elements were, so we could compare Satisfaction with Importance to derive a “service delivery gap”. The table below shows that the elements with the largest gaps are Cleanliness, Value for money, and Activities available at convenient times.

Importance and satisfaction gap



For further analysis of Satisfaction when cross-tabulated by various demographics please see Appendix 1.

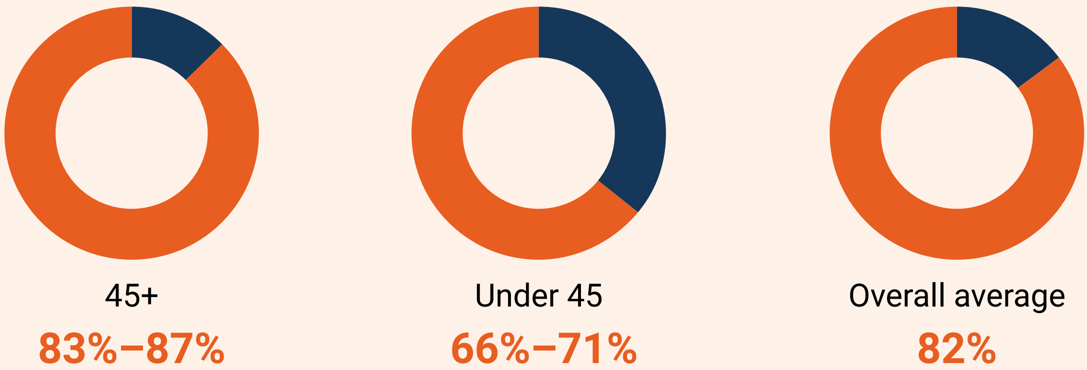
The Digital Journey

With more customers using online services to access information and booking services, a set of questions on this area was included in the survey for the first time.

69% of respondents did not use online services to find information about available sessions, but among those who did, usage of online services increases significantly with age.

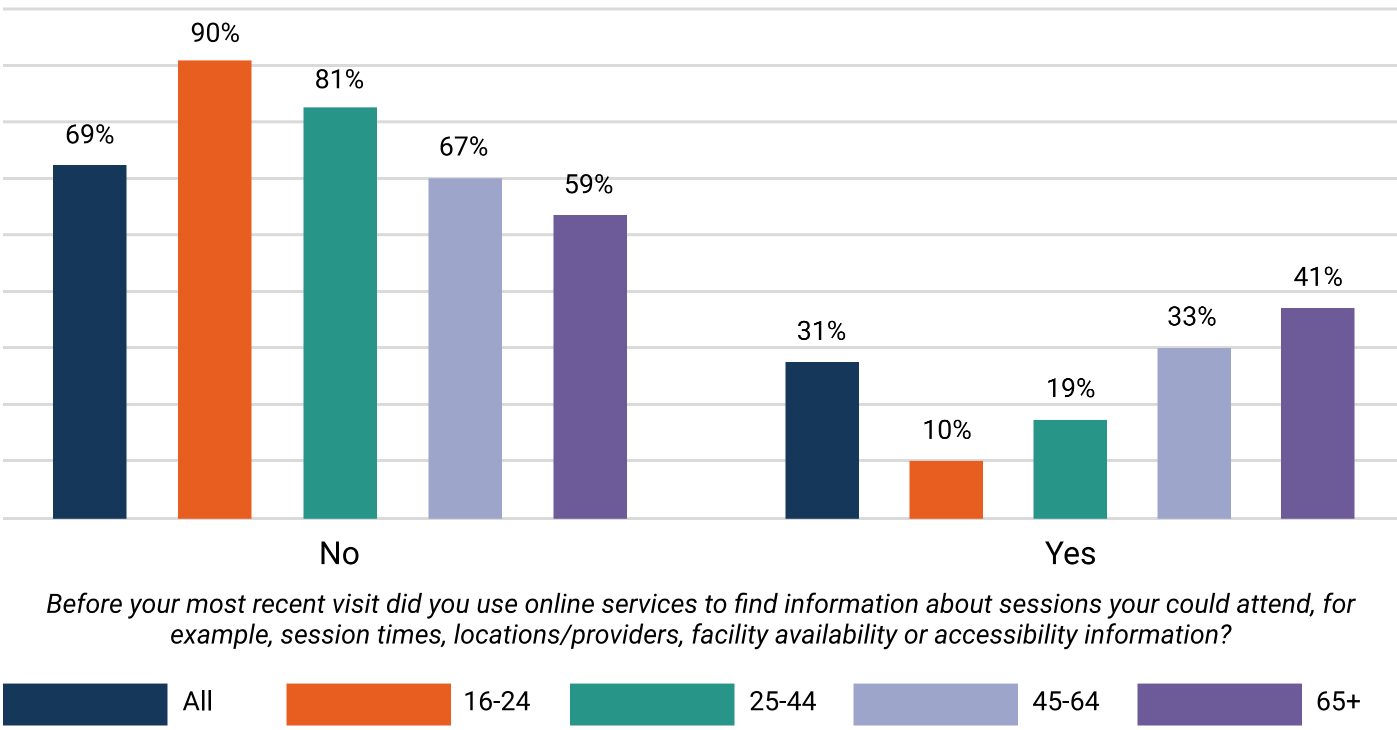
Respondents aged 45+ are more likely to book sessions online compared with younger groups:

Booking sessions online



There is also a strong link between age and online booking behaviour as shown by the chart below, with older age groups generally using online services to find information about sessions more than younger age groups.

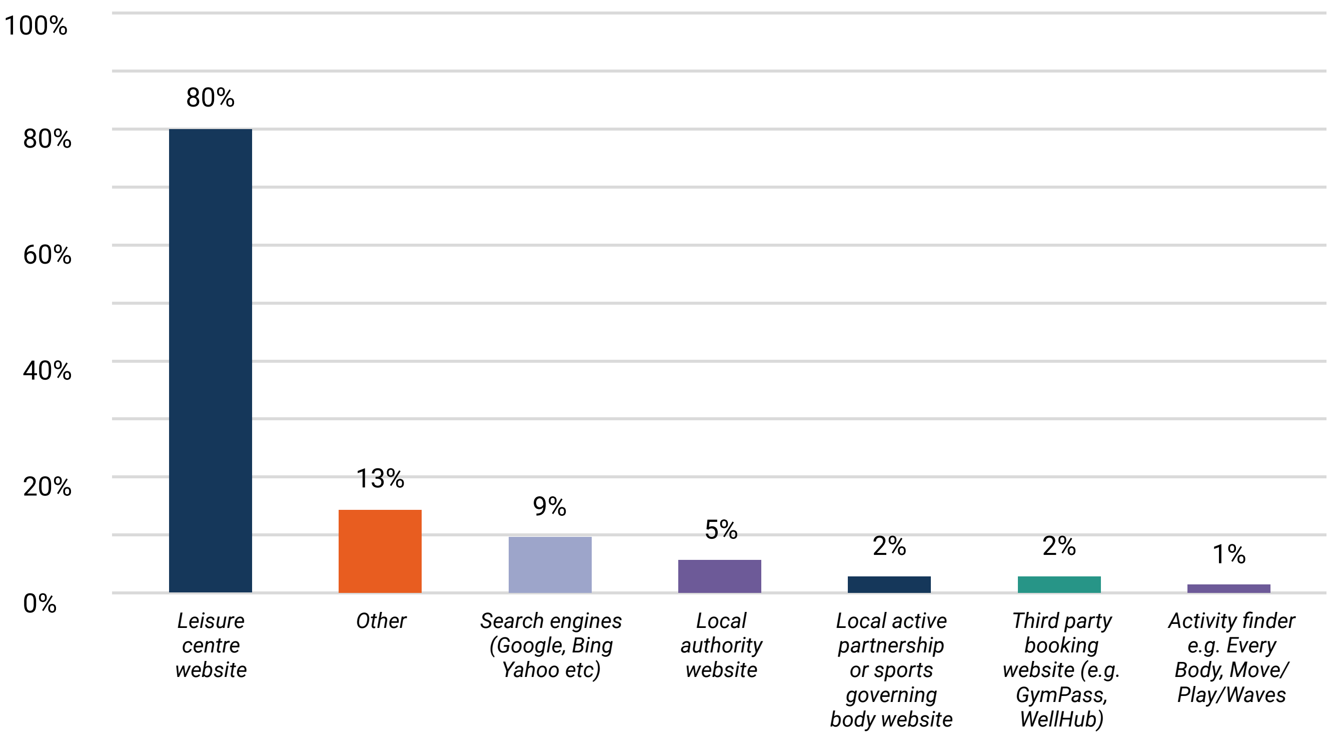
Online information search



Before your most recent visit did you use online services to find information about sessions your could attend, for example, session times, locations/providers, facility availability or accessibility information?

Online service(s) used

Which online service(s) did you use (select all that are relevant)



Finally, females are more likely than males to use online services (35% v 25%) and to make online bookings (85% v 76%).

Usage of online services increases significantly with age

Higher online booking in 45+ age group

% of respondents ages 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 age group

% of respondents ages <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%)**

View of the Leisure Centre

Another new set of questions focused on the customers' views and feelings about their leisure centre. The key findings are summarised in the table below.

85% agree that the leisure centre is inclusive and welcoming

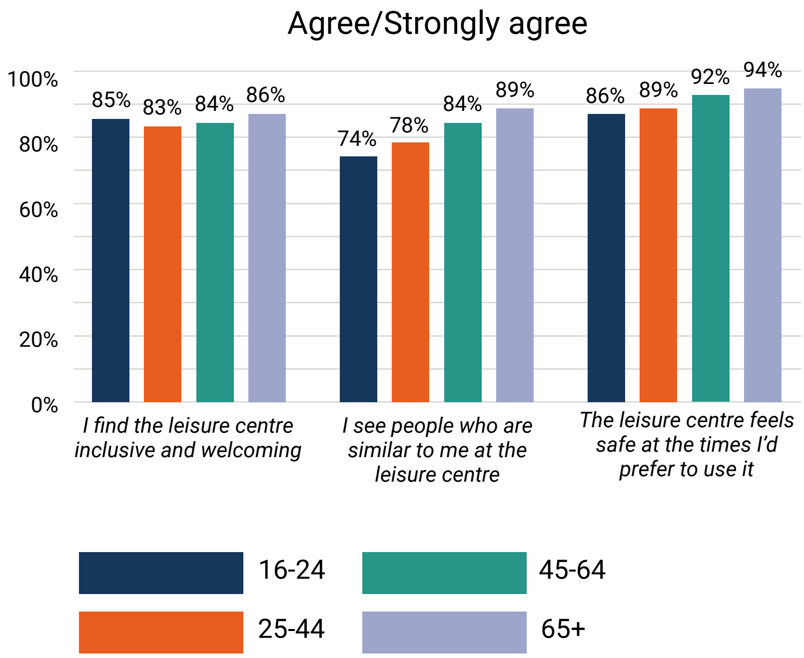
85% see people similar to themselves at the leisure centre

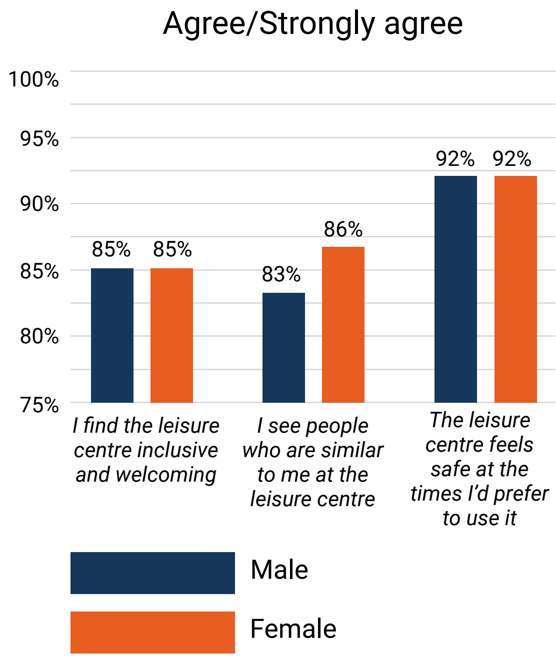
92% of respondents feel safe using the leisure centre at their preferred times

When analysed by age and gender, there were interesting differences in customers' views, with older age groups and females generally feeling more positive about their centre.

View of the leisure centre

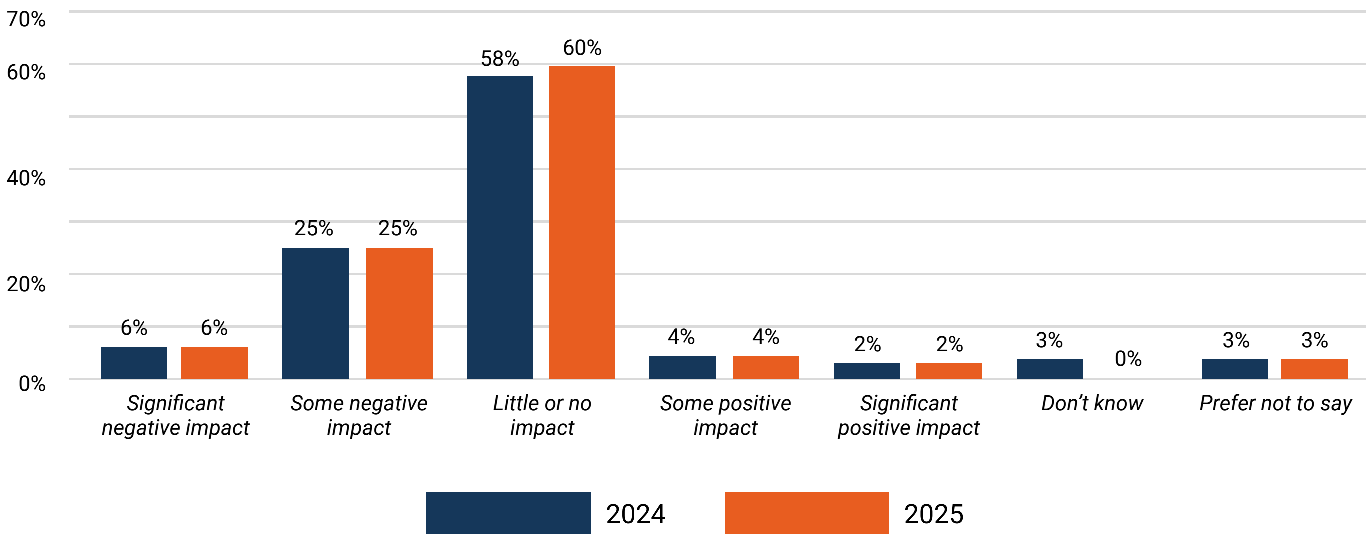
Thinking about the exercises that you do at the leisure centre, to what extent do you agree or disagree with these statements?





Cost of Living Impact

For the third year running, a question about the impact of the increased Cost of Living was included. The results were exactly the same as last year with 31% stating that it had a Significant or Some negative impact on their use of sports, leisure and health/fitness facilities.



Analysis was undertaken to compare responses to this question based on customers' IMD (Indices of Multiple Deprivation) based on their postcode. Relatively more people in the lower IMD groups (i.e. more deprived) reported negative impacts than those in the higher groups.

	IMD 1 & 2	IMD 3 & 4	IMD 5 & 6	IMD 7 & 8	IMD 9 & 10
Negative impact	38%	35%	32%	29%	28%
Positive Impact	10%	7%	6%	5%	5%
Little or no impact	52%	58%	62%	66%	67%

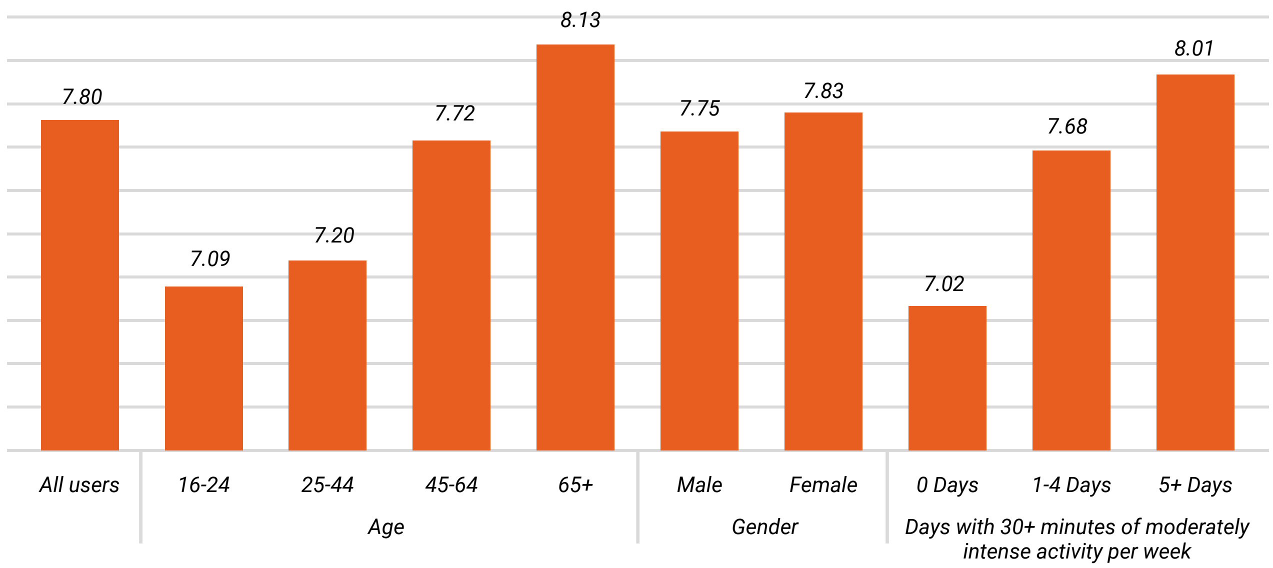
Life Satisfaction

A life satisfaction question was introduced in this year's survey to measure facility users' subjective well-being. Respondents were asked to rate satisfaction with their life nowadays, on a scale of 0 to 10, where 0 is "not at all satisfied" and 10 is "completely satisfied". The findings showed that facility users had an average life satisfaction of 7.8, which is 0.2 above the UK average of 7.6[2]. Average satisfaction was relatively high across all demographic groups, with the lowest score at 7.09. Younger participants (16-44) showed notably lower satisfaction, averaging 7.2 or lower, compared with the older age groups (7.7 or higher), which indicates a clear age-related subjective well-being gap.

Higher average life satisfaction was observed among individuals with greater engagement in physical activity. Facility users completing at least 30 minutes of moderate-intensity activity on five or more days per week reported the highest satisfaction (8.01), while those reporting no such activity scored the lowest (7.02). This pattern indicates a clear positive association between regular moderate physical activity and perceived life satisfaction, highlighting opportunities to enhance well-being through increased participation.

[2] Based on the Q2 2025 data (latest available) [Quarterly personal well-being estimates – seasonally adjusted - Office for National Statistics](). (Note. Satisfaction Scores: 0-4 is 'low', 5-6 is 'medium', 7-8 is 'high' and 9-10 is 'very high' level of life satisfaction)

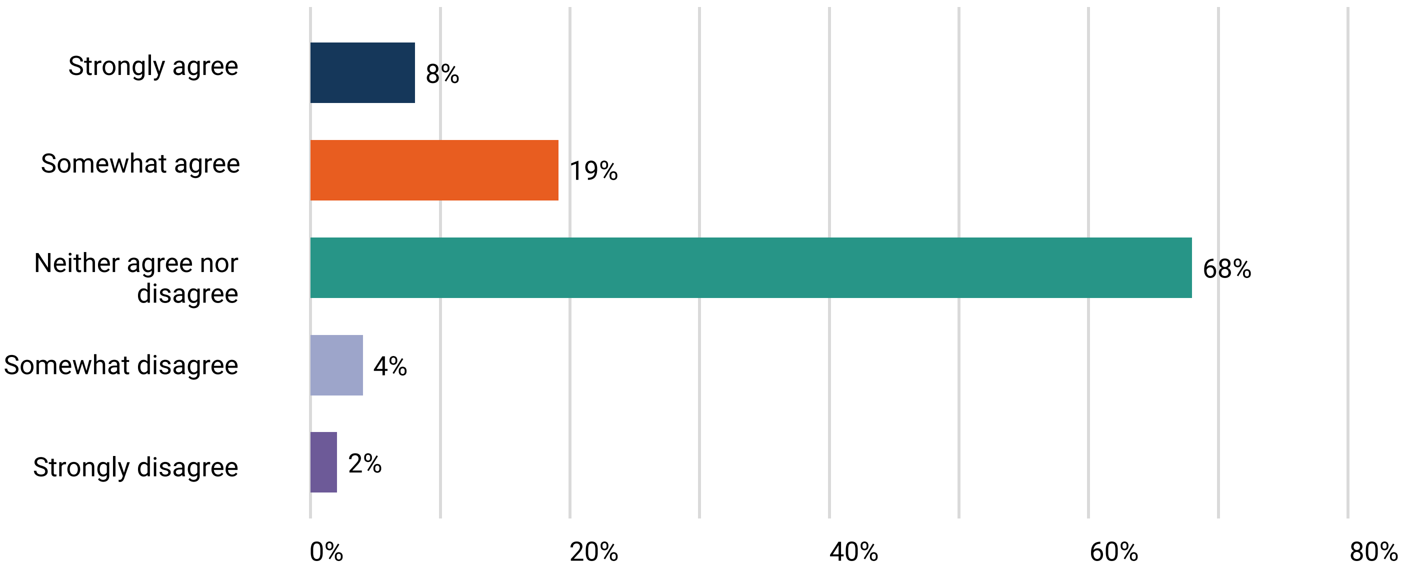
Satisfaction with life



Environmental Sustainability

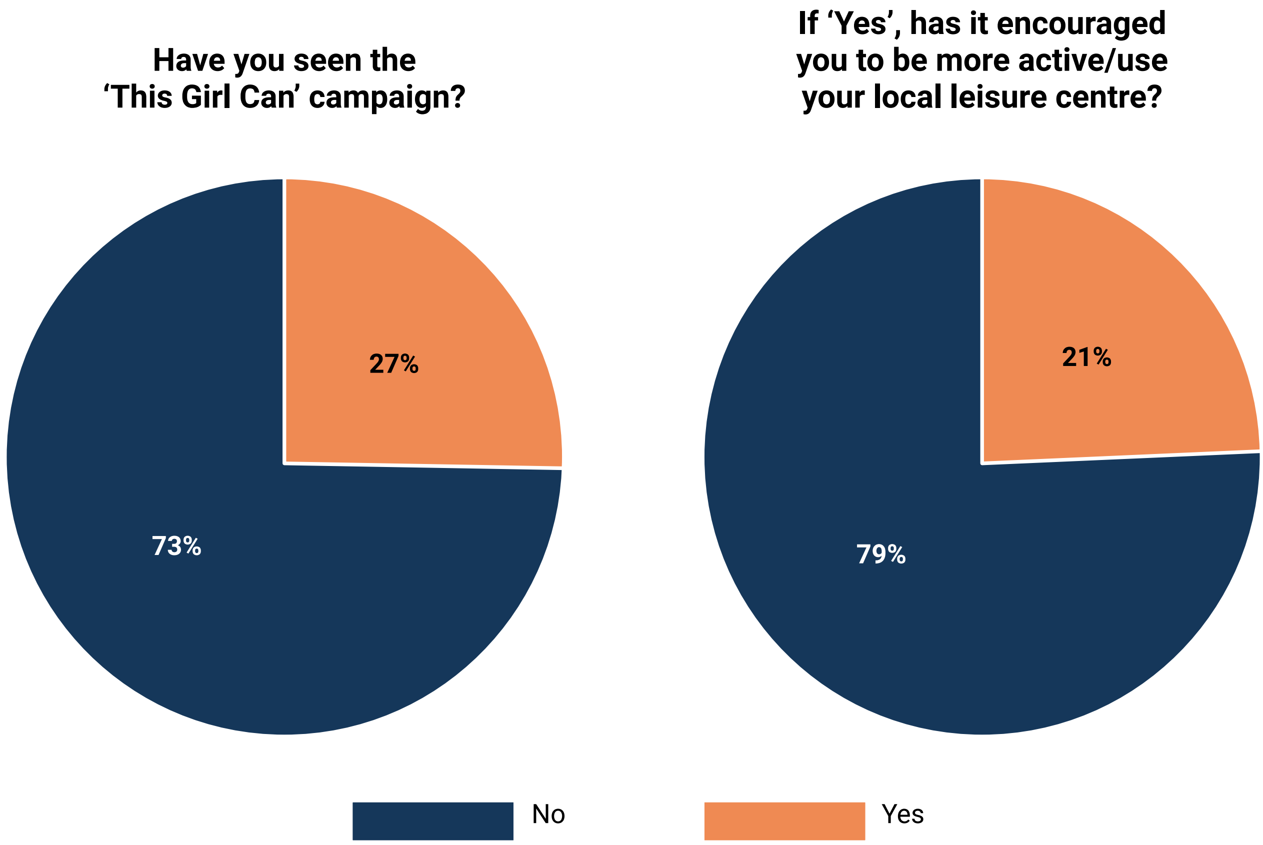
For the second year running, a question was asked about whether customers felt their centre was doing enough to make their services more environmentally sustainable. Overall, 27% of customers answered positively, a very similar figure to last year.

To what extent do you agree or disagree that your leisure centre/provider is doing enough to adapt physical activity opportunities to be more environmentally sustainable?



‘This Girl Can’ Campaign

Respondents were asked whether they had seen the recent ‘This Girl Can’ campaign and, if so, whether it had encouraged them to become more active or to use their local leisure centre. Overall, 27% reported seeing the campaign, and 21% of these individuals indicated that it had influenced their behaviour - either by motivating them to become more physically active or by encouraging a greater use of their local leisure centre. These findings suggest that although the campaign’s overall reach within the sample was modest, its impact among those exposed was beneficial, with one in five viewers reporting positive changes in their activity-related behaviours.



Appendix 1

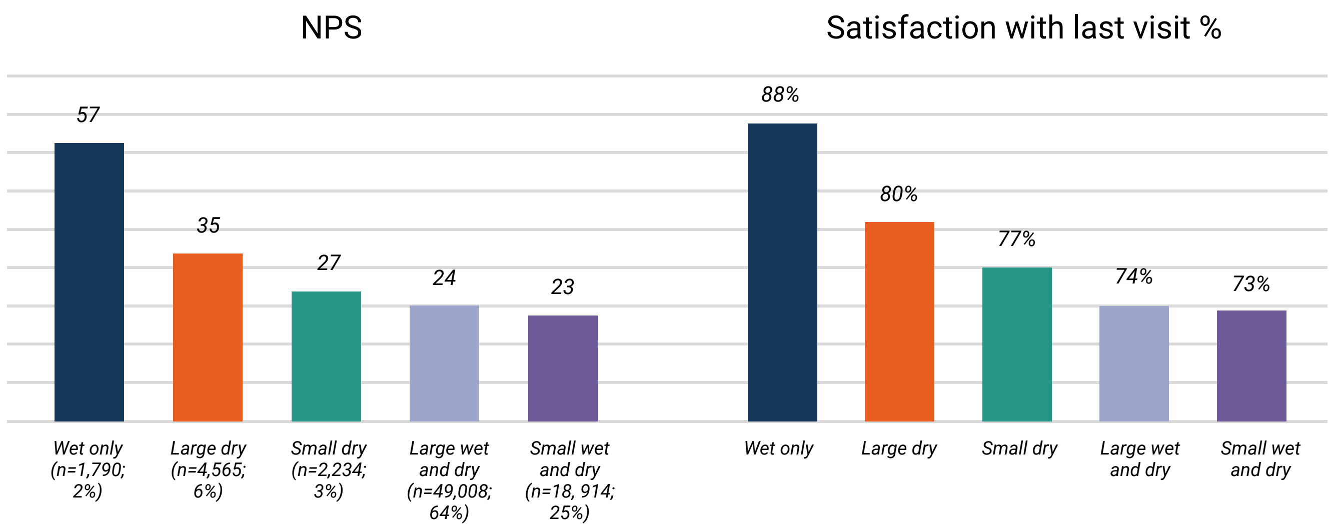
Further cross-tabulation of key questions

Additional NPS and Overall Satisfaction Analysis

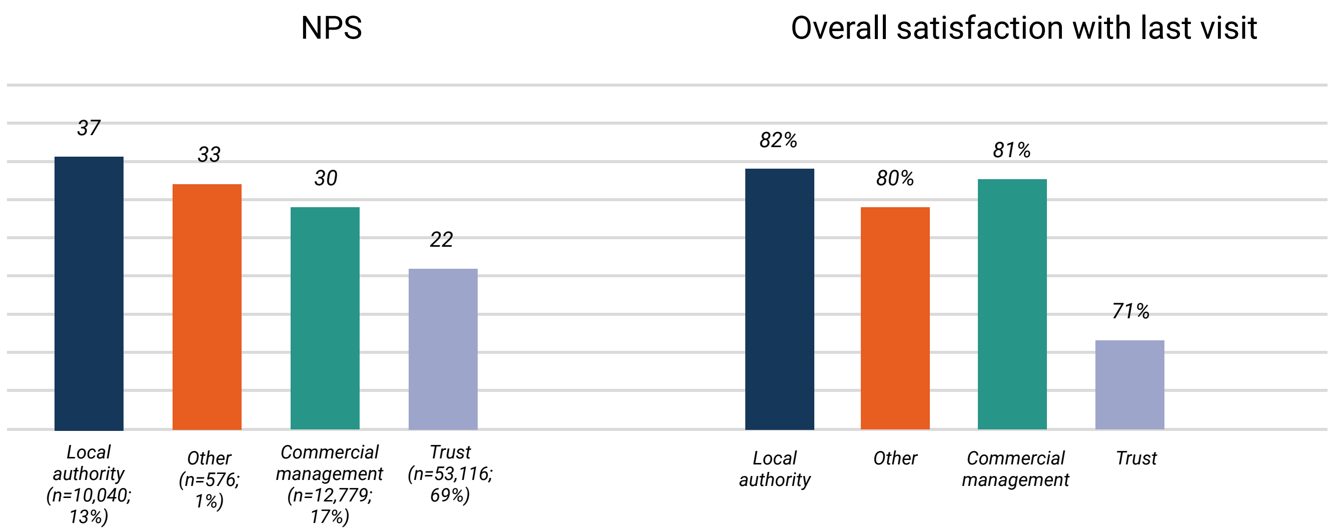
Because of the importance of NPS and Overall Satisfaction scores to the sector, further analysis was undertaken on these two questions.

Overall NPS was driven down by respondents from mixed sites and trust-managed sites (64% and 69% of the total sample, respectively) who gave relatively lower scores for these types of facility. Satisfaction levels at these sites reflect their Net Promoter Scores.

NPS and overall satisfaction by facility type



NPS and overall satisfaction by management type



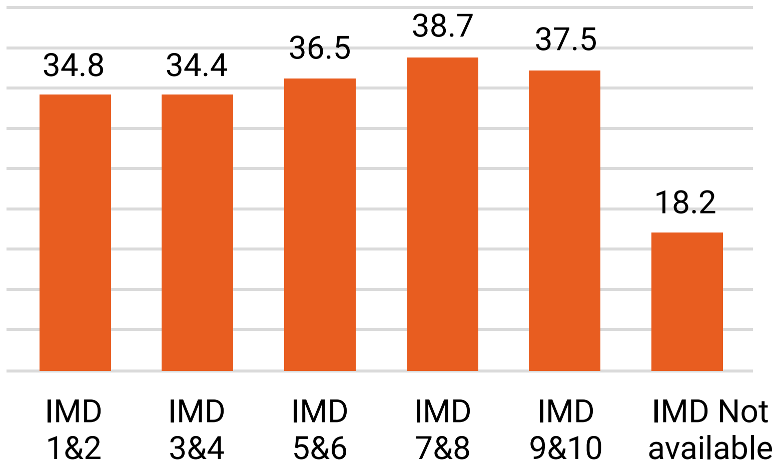
IMD Analysis

From a subsample of over 29,000 respondents (postcodes were used as a proxy for deprivation), those in more deprived areas (IMD 1–6) have a significantly higher proportion of detractors than less deprived areas (IMD 7–10), resulting in their relatively lower NPS. Although average satisfaction is high (79%–84%), respondents from the most deprived 20% (IMD 1–2) are the least satisfied compared with others (IMD 3–10).

Respondents from IMD 1-2 also reported a relatively lower satisfaction with their last visit, value for money, cleanliness, ease of online booking, and activity availability. Cost-of-living pressures affect them more, with 38% of IMD 1–2 respondents reporting a negative impact on their use of sports, leisure and health/fitness facilities over the last 12 months, compared with 28% in IMD 9–10.

2025 Net promoter score by postcode IMD

Net promoter score by deprivation (IMD) 2025



(Note. IMD valid response n=29, 396)

	IMD 1 & 2	IMD 3 & 4	IMD 5 & 6	IMD 7 & 8	IMD 9 & 10
Dissatisfied/ very dissatisfied	13%	12%	12%	11%	10%
Neither satisfied nor dissatisfied	8%	7%	6%	6%	6%
Quite satisfied / very satisfied	79%	81%	82%	83%	84%

Overall satisfaction by age and gender

Both males and females showed similar satisfaction levels with their overall visit.

Overall satisfaction with the last visit is highest among **older age groups (55+),** with **77% to 81% reporting high satisfaction**, which aligns with their relatively high NPS.

In contrast, the **25–34 and 35–44** age groups show **significantly lower satisfaction** than the overall average, helping to explain their lower NPS of 3 and 6, respectively.

However, across all respondents, the majority **(67% to 81%)** report being satisfied or very satisfied with their visit, resulting in a **high overall average of 75%.**

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

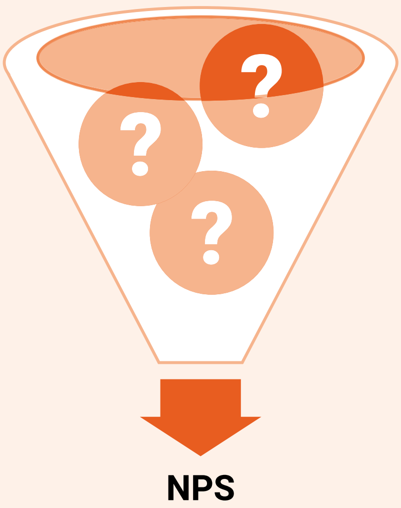
Factors affecting NPS

Overall satisfaction with the last visit is the strongest influential factor of NPS, showing a positive correlation of 0.59 and explaining about one-third of the variation in likelihood to recommend. This finding means that **improving overall visit satisfaction has the greatest potential impact on NPS.**

Satisfaction is shaped by key service attributes such as perceived quality of service, value for money, and staff interactions. Each of these factors shows moderate positive correlations with NPS, accounting for 16%–30% of variation when considered independently. These findings highlight the importance of consistently delivering high-quality, customer-focused experiences.

For detractors, overall satisfaction with the last visit remains the most influential factor, followed closely by value for money, which is a particularly relevant factor given cost-of-living pressures and the negative impact on their usage of leisure centres as mentioned below.

NPS and correlating Factors



Strong/moderate positive correlations

Overall satisfaction with their last visit ($r=0.59$, $R^2=0.34$)

Satisfaction with specific service attributes ($r=0.40$ to 0.55; $R^2=0.16$ to 0.30)

Top 5 specific service attributes influencing NPS

1. The activities/memberships are value for money
2. Staff are available to help when I need it
3. The centre is clean e.g. changing areas/activity areas
4. Staff are helpful and friendly
5. Activities are available at convenient times

In addition, when comparing the satisfaction level of detractors with the overall average, there were relatively fewer detractors who were satisfied with their last visit (30% v 75% of all users). The gaps for specific attributes range from 22% to 36%, showing that detractors consistently reported lower satisfaction across all service attributes.

Enhancing the overall satisfaction experience and perceived value for money of activities, alongside other key influential factors such as cleanliness, activity programming, and inclusivity, can potentially reduce detractors and convert passives into promoters, thereby driving improvements in NPS.[3]

[3] While facility users may share similar characteristics, it would be worthwhile for sites which participated in the Customer Survey to review their own survey data where possible, to better understand their customers and implement the most appropriate strategies.

	All %	Detractors	Difference (Detractor % - All %)
Overall experience	**75%**	**30%**	**-45%**
The activities/memberships were value for money	82%	46%	**-36%**
The centre is clean e.g. changing areas/activity areas	69%	33%	**-35%**
Activities are available at convenient times	78%	44%	**-34%**
There is a wide range of activities available	77%	47%	**-31%**
Staff are available to help when I need it	85%	56%	**-29%**
Staff are helpful and friendly	89%	63%	**-26%**
Activities are easy to book online	84%	61%	**-23%**
Teaching/coaching staff are suitably qualified for the activities they are involved in	86%	64%	**-22%**

NPS Insights - Summary

NPS 2025 v 2024

Overall NPS decreased from 28 to 25 due to **decreased promoters %** and **increased detractor %.**

Gender Insight

Females show a higher NPS, driven by **more promoters.**

Age Insight

Younger/middle-aged users (25-44) have **lower satisfaction and lower NPS.**

Older users (55+) show **higher satisfaction and NPS.**

Main NPS Driver

Satisfaction with the last visit is the **most influential factor** of NPS for all users (including detractors).

Top influencing service attributes

Value for money, staff availability or helpfulness**, cleanliness** and **convenient activity times** are key influencing factors

Detractors' Sensitivities

Value for money, safety and inclusivity are among the main influential factors for detractors' NPS scoring.

Detractors reported a **higher % of negative impact on facility usage due to increased** costs of living.

Satisfaction Gap

Only **30% of detractors satisfied with their last visit vs 75% overall.**

Detractors had well **below average satisfaction across** all **service attributes.**

Positive perceptions of leisure centre

Majority find the centre **inclusive** (85%), **safe** (92%) and **reflective of their community** (i.e. find people similar to them) (85%).

Inclusivity by demographics

Older and the **youngest age groups feel most welcome.**

Females and older age groups (45+) were **seeing people similar to them slightly more** than male and younger groups.

Actionable

Improve service provision and users' **value for money perception.**

Focus on younger/middle-aged segments (especially among 25-44 year olds).