

Exe Valley Leisure Centre, Tiverton

Methodology

In the light of Exe Valley Leisure Centre's plans to expand the fitness offering, we have set out to find out more about the current customer reach at the centre, the size and demographic profile of both the existing membership and the catchment area, and the potential to increase membership numbers from the current figure of 1,422.

As part of this exercise, we have plotted the postcodes of existing members to see how far they are travelling and therefore what can be regarded as a realistic core catchment area for the centre, bearing in mind any improvements in facilities but also the whereabouts of competing facilities in the area.

Current Member Spread

Exe Valley Leisure Centre is situated on the west side of Tiverton, a town of just under 20,000 people which is easily the largest population centre in this part of Devon. 63% of the centre's members live within 2 miles of the leisure centre. Thereafter, they tend to be widely scattered around the many villages which make up this very rural area. Generally, local people are used to driving considerable distances for local services, and there are concentrations of members in Bampton (c. 6 miles to the north of Tiverton), Silverton (c. 7 miles to the south) and Cullompton (c. 6 miles to the south east, close to the M5). Cullompton has its own 'dry' sports centre, which indicates that Exe Valley users here are either people who work in Tiverton or who want a swimming pool as part of their facility mix.

Overall, we have concentrated on a 13 minute drive around Exe Valley LC, which is home to 80% of current members and, in all, nearly 33,000 people. We have, however, omitted those people who live to the east of the M5 motorway (mainly in Appledore and Uffculme) to leave us with a core catchment area which includes 77% of all members and has a population of 28,056 people. This extends north to Bampton; east along the A361 to Sampford Peverell and the M5; west along the A361 towards Rackenford and south to Bickleigh (this thus exceeds the numbers found within a 5 mile radius).

Current Member Penetration

The penetration summary concentrates on just those members who live within the adjusted 13 min drive time catchment (1,059 in total) and breaks these down into one of the 15 Mosaic groups and 67 Mosaic types. The figures in red show what proportion of both members and population fall into each category. Dividing the total number of residents in each group and type by the number of members gives (right hand column) a figure for the percentage of the market which the centre is currently penetrating (3.77% overall at present). However, we can see that the centre is performing much better than this mean figure in a number of different segments.

Group M (Industrial Heritage) includes people who are generally in affordable, older style housing. They are largely working class, middle-aged and incomes are below average. The segment is performing well for the centre at present with almost 13% of members from a catchment population of just over 10%. So your overall penetration is 4.8%. Within this group, you have type M55 (Backyard Regeneration), which is the best

performing type across the board. Generally consisting of parents in their thirties, often in white collar occupations, these people have a high propensity to visit leisure centres – particularly those with swimming pools. At Exe Valley, they make up 6.7% of all members even though within the catchment area as a whole, it makes up just 3.47%. Your penetration within this type is 7.3%.

Group D (Small Town Diversity) also performs well at Exe Valley. This is the second largest Mosaic grouping in the area and consists of those residents of small towns who have strong roots in their local community. Overall, the centre is having some success in attracting these people: the member share (16.8%) exceeds that among the wider catchment population (13.8%).

Group C (Rural Solitude) is prominent in this area and as the name suggests, consists of residents of small villages and isolated homes where farming and tourism are the mainstays. Although economically reasonably affluent, their propensity to use leisure facilities can be comparatively modest because of the distances they have to travel (they often live in the outlying villages in and around the edges of a catchment area). This group makes up the largest share of the catchment population (19.8%) and 18% of members.

Types G31 (Domestic Comfort) and G32 (Childcare Years) also do well here. Together they account for over 7% of members and the penetration in both is over 5% (over 6% in the case of G31). G is a young group, full of affluent families with young children, often with both parents working and household incomes some way above average. They tend to be good targets for fitness offerings, especially where there are also facilities and activities available for their children.

Group I (Ex-Council Community) makes up a large share of the catchment population (18.7%) but the proportion of members is smaller (12.7%). People in this group tend to be self-reliant, hard workers, many of them council tenants with comparatively low disposable incomes. But they can be good targets for fitness facilities, especially those in the public sector where price points tend to be a bit cheaper.

Note that the area does have above average numbers of groups E (Active Retirement) and L (Elderly Needs). The latter, in particular, is largely out of reach for gym providers (your penetration in this group is much lower than it is in group E).

Competition

Clearly, competition in Tiverton is fairly thin on the ground. The gym facilities at Petroc College just across the road (c. 25 stations) are available for £19 per month (gym only) or £28 per month (with classes). The Willows Health & Fitness on Fore Street has a 24 station gym and treatment room / sauna / sunbed. Membership costs £33 per month. There are no other substantial gyms within 5 miles radius or 13 mins drive.

Latent Demand

We have estimated the total demand for Exe Valley Leisure Centre, bearing in mind the enlarged fitness offering, to be 2,112 – this is the total number of members we feel could be achieved. This includes allowance for 23% of the total to travel from further afield (as they do now). However, we think that penetration rates will fall off slightly

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towards the edge of the catchment area and in particular as you get closer to Cullompton and we have made a reduction of 100 to the overall figure in recognition of this.

After subtracting the current membership figure of 1,422, it leaves a latent (i.e. unmet) demand of **690** – this is how many more members we feel could be achieved.



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