The State of Indoor Climbing in the UK

Quantitative Market Research Findings

conducted for

The Association of British Climbing Walls

May 2019

Crystal Market Research Ltd,
5 Hurle Crescent, Clifton, Bristol BS8 2SX.
www.crystalmarketresearch.co.uk
07801 151850
helen@crystalmarketresearch.co.uk

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Executive Summary

- The Association of British Climbing Walls (ABC) commissioned Crystal Market Research to repeat the work they carried out in 2017, in order to get more insight into the climbing walls industry: the current trends, current market and identify areas for growth.

- Key findings contained in this report include: At a conservative estimate…

  - Over 12 months, 1.5 million people climbed independently indoors, including 120,000 regulars
  - A further 500,000 U18s climbed under supervision, and a further 150,000 adults were supervised
  - There were an estimated 8 million visits to centers in one year

- The number of indoor climbers shows an increase since 2017 of 40-50%. The extent of this increase is misleading as it is mostly due to the 'large' walls in this year's survey being larger (and more representative) than in 2017. However, some of the increase is from...
  - More climbers at existing walls
  - More and bigger walls on the scene

- The indoor climbing industry is thriving and growing but competition is also increasing and some centres are reaching saturation: a minority of walls have not seen and/or do not expect an increase in numbers or revenue, but the larger walls tend to be more successful. 1 in 5 centres are under 2 years old. Bouldering continues to dominate the industry but auto belaying is becoming more widespread

- Customers retention remains a challenge: though increasing numbers are trying out indoor climbing, there's still scope to convert more into regulars as only 8% of independent climbers climb 'regularly'

- Indoor climbing remains diverse in terms of gender, age and geography

About the research

The aim of the research is to gather information about the indoor climbing wall market… updating a similar survey conducted summer 2017

- Investigate …
  - Number and profile of indoor climbers, number of wall visits
  - Wall turnover
  - Growth … past, future
  - Wall offering … facilities, payment methods
  - Staffing and pay

- Provide useful market information to walls and help the ABC better support the industry …

36 walls took part in the research…. compared with 27 in 2017

Survey of a representative sample of 36 walls in the UK

Information supplied by owner/wall manager

19 November 2018 - 8 February 2019

Customer entry system data a key resource for information, plus ’educated’ estimates

Survey data grossed up to give national market sizing

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Participating walls selected at random...

Stratified random sampling

List of 249 walls ordered according to size
… within size by region
… within region listed alphabetically

Every 7th wall on the list selected for interview

If selected wall unable or unwilling to take part, next wall on list approached … and so on

Representative sample in terms of size, type and geography

Sample of 36 walls = 15% of list

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From a comprehensive list of climbing walls...

List of walls used for 2017 survey updated and improved

↓

List = dedicated climbing walls and leisure centres/university sports centres having a wall of significant size that is open to the public

↓

Excludes walls that are:
Non commercial (e.g. schools, military, youth groups), private, independent climbing not allowed, limited opening hours, outdoors, mobile, in a shop, tiny

↓

249 walls on 2018 list (65 large, 77 medium, 107 small)

↓

Large = 250+ problems and/or 75+ lines
Small = <100 problems and/or <25 lines
Medium = in between
(size based on website info, photos and industry knowledge)

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The list covers most of the market = (more or less) all the large and medium walls... but not all the small, non commercial or private walls, which could number a further 1,000+

Wall List				
	Total	**Large**	**Medium**	**Small**
Lakes	7	3	1	3
London	21	9	5	7
South East	43	9	16	18
Midlands	35	10	10	15
North East	8	3	4	1
North West	17	8	4	5
Northern Ireland	5	1	2	2
Peak	15	6	2	7
Scotland	29	5	8	16
South West	25	4	11	10
Wales	27	4	5	18
Yorkshire	17	3	9	5
Total	**249**	**65**	**77**	**107**

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10% of walls on the list are new… they tend to be larger. Walls that have closed are mostly small.

Walls since summer 2017		
	Opened	**Closed**
Large	4	1
Medium	11	4
Small	9	12
Total	**24**	**17**

Note: 10 of the walls that have closed are High Sports/Climb

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The wall owner or manager was interviewed by phone… a few completed the questionnaire independently

Phone selected wall, ask to speak to owner or wall manager

↓

"Purpose of survey
Professionalism and independence (security of data, findings reported in aggregate, anonymous)
Results shared with participants
Content of survey (customer entry system to be interrogated)"

↓

Letter and questionnaire emailed

↓

Telephone interview appointment (or completed questionnaire returned by email)

↓

Further email/telephone communication to check/verify data

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All parts of the country and size of wall are well represented in the survey…

Survey Sample				
	Total	**Large**	**Medium**	**Small**
Lakes	**1**	1	0	0
London	**4**	4	0	0
South East	**7**	0	4	3
Midlands	**4**	1	3	0
North East	**1**	1	0	0
North West	**3**	1	1	1
Northern Ireland	**1**	0	1	0
Peak	**2**	1	0	1
Scotland	**4**	2	0	2
South West	**3**	0	2	1
Wales	**4**	1	0	3
Yorkshire	**2**	0	1	1
Total	**36**	**12**	**12**	**12**

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Shape and structure of the market & service offer

All the large walls in the survey are dedicated walls… the small walls tend to be in leisure, sports or activity centres…

Size of wall	Dedicated	Leisure centre	University sports, activity, community centre
Large (n = 12)	12	0	0
Medium (n = 12)	7	3	2
Small (n = 12)	3	6	3
TOTAL (n = 36)	**22**	**9**	**5**

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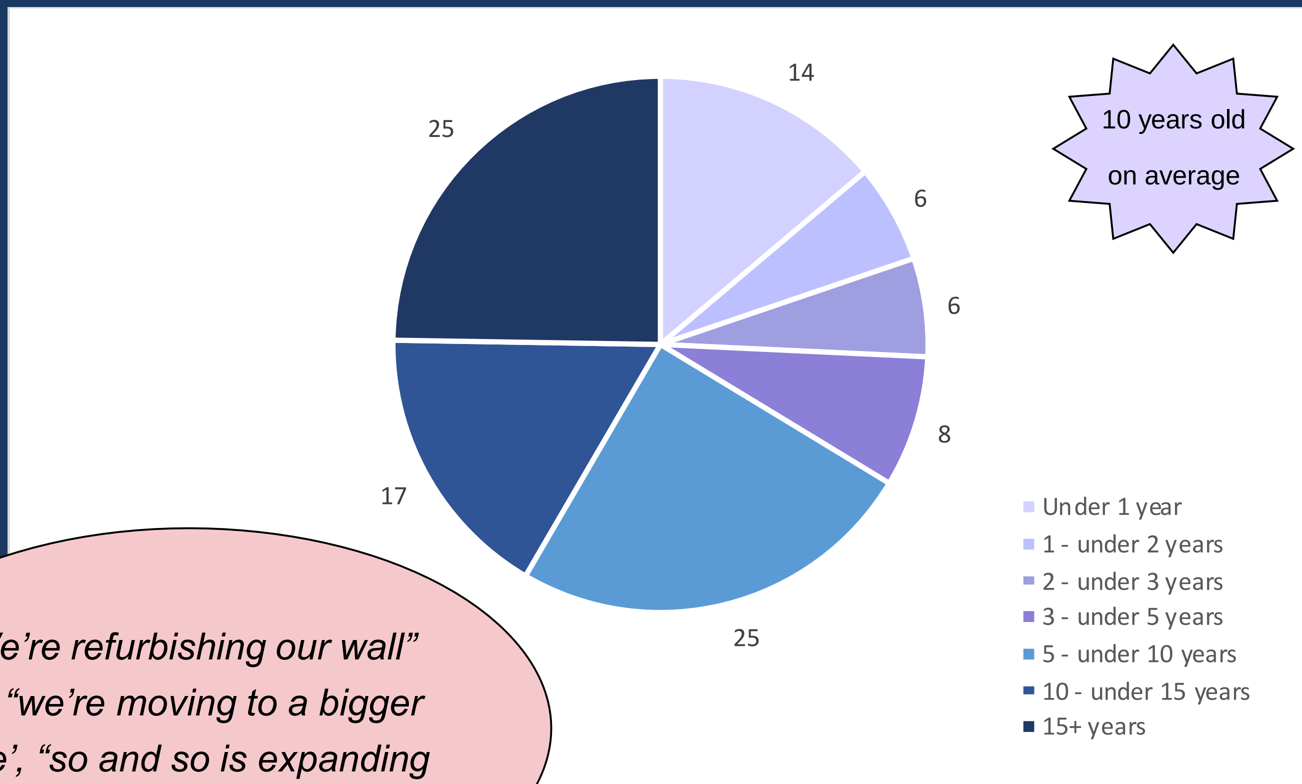
There are some established climbing walls but also lots of new entrants… 1 in 5 are under 2 years old… anecdotal mention of existing walls expanding and future new walls

Age of Walls %s



We're refurbishing our wall" … "we're moving to a bigger site', "so and so is expanding their wall" … " a new wall is planned for …"

Base: 36

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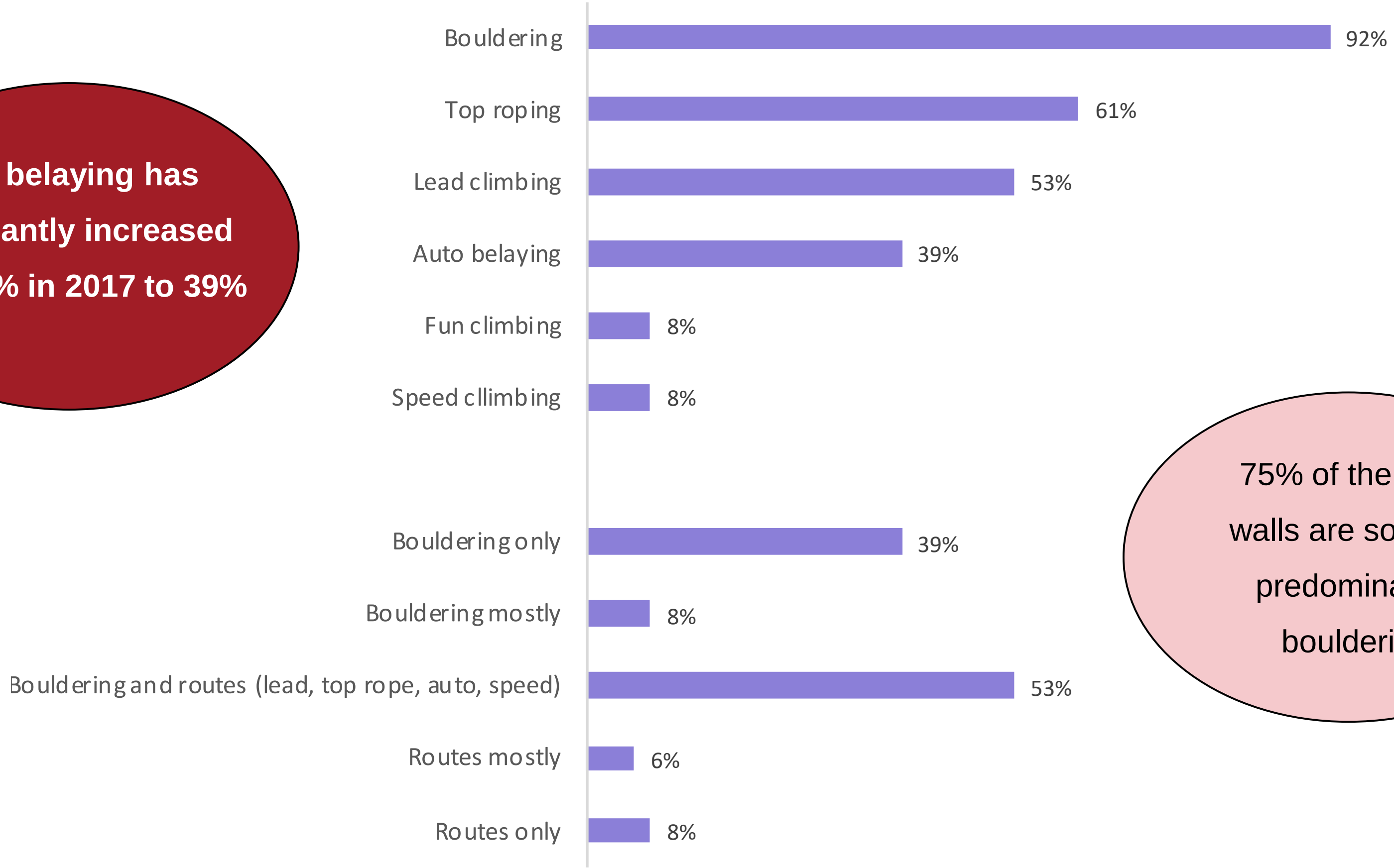
Bouldering continues to be the most popular form of indoor climbing...



Auto belaying has significantly increased from 19% in 2017 to 39%

75% of the large walls are solely or predominantly bouldering

Base: 36

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There’s more to climbing walls than climbing... there are social, educational, self improvement and competitive aspects

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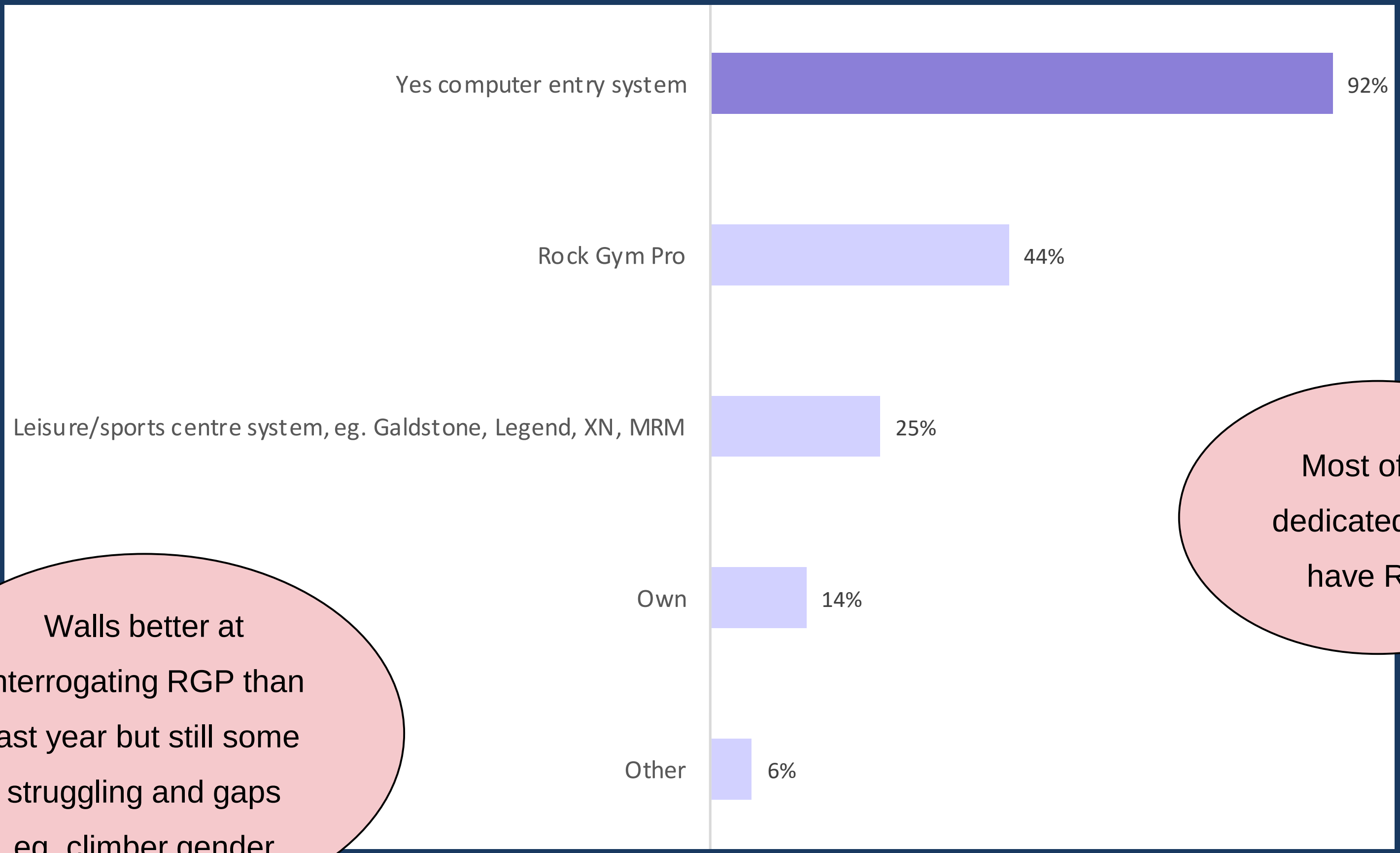
Most walls have the capacity to know a lot about their customers...

Computer Entry System



Most of the dedicated walls have RGP

Walls better at interrogating RGP than last year but still some struggling and gaps eg. climber gender

Base: all

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Customer participation and demographics

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Approaching 1.5 million people have climbed indoors independently* in the last 12 months... a 50% increase since 2017

Unique users in last 12 months climbing independently*				2017 survey
Wall size	**Average # per wall**	**# walls in UK (master list)**	**Gross #**	**Gross #**
Large	14,678	65	953,580	538,428
Medium	5,298	77	407,955	271,883
Small	1,083	107	115,881	147,172
TOTAL			**1,477,416**	**957,483**

Base: 31

Note: much of this increase will be due to having larger walls in the sample this time. The survey sample this year is judged to be more representative than in 2017.

\+ **Independent climbers at non commercial, private and other walls not covered by this survey**

*not part of a group, lesson or award scheme, i.e. unsupervised

Approaching 120,000 ‘regularly’ climb independently indoors... a 30% increase since 2017.

Independent climbers climbing at least twice every 28 days				2017 Survey
Wall size	**Average # per wall**	**# walls in UK (master list)**	**Gross #**	**Gross #**
Large	939	65	61,011	44,961
Medium	518	77	39,910	32,652
Small	145	107	15,503	10,837
TOTAL			**116,242**	**88,450**

50,379 climb at least once a week

Only 8% of independent climbers are 'regulars'

Base: 27

Note: ’30 minutes activity of at least moderate intensity at least twice every 28 days’ is Sport England’s definition of ‘regularly taking part in sport and physical activity’

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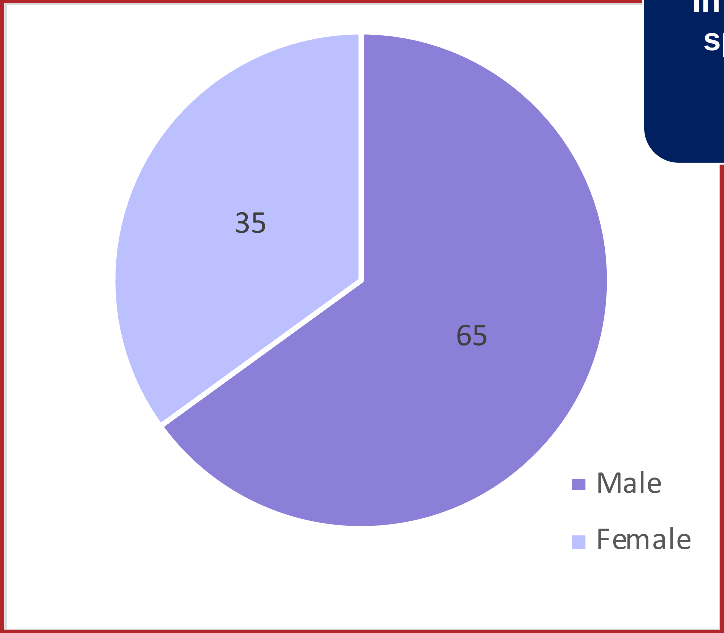
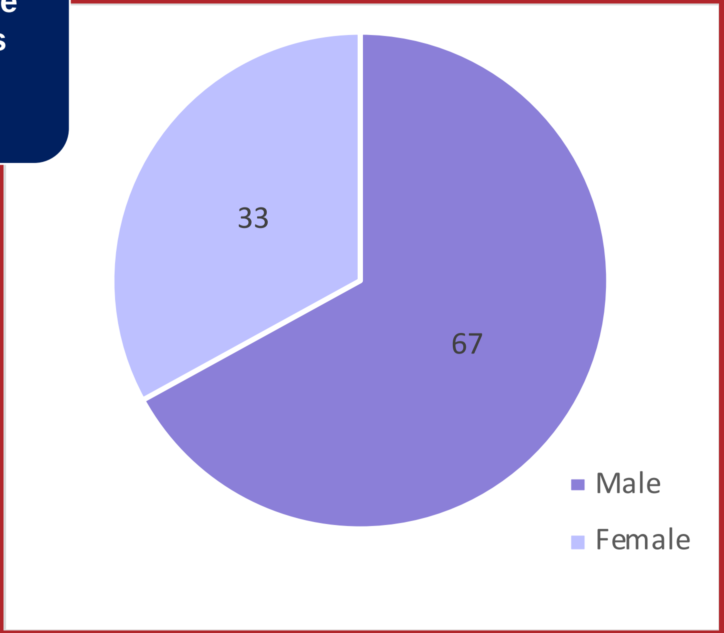
It is estimated that 1 in 3 independent climbers are women… the number of women climbing regularly has increased

Independent climber gender split



In 2017 the male:female split was estimated as 66:34 overall, 71:29 regulars

Regular independent climber gender split



Base: 35

Note 1: figures based mostly on estimates, not customer entry data

Note 2: Averages not weighted according to size of wall

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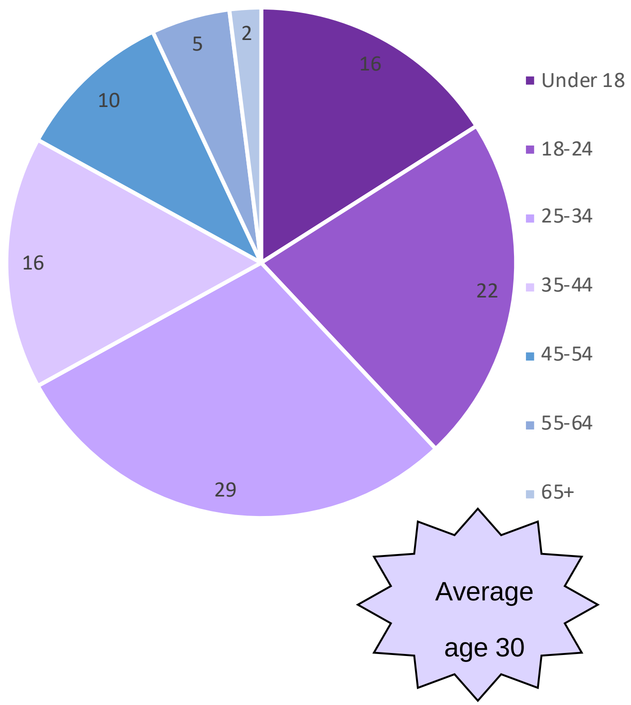
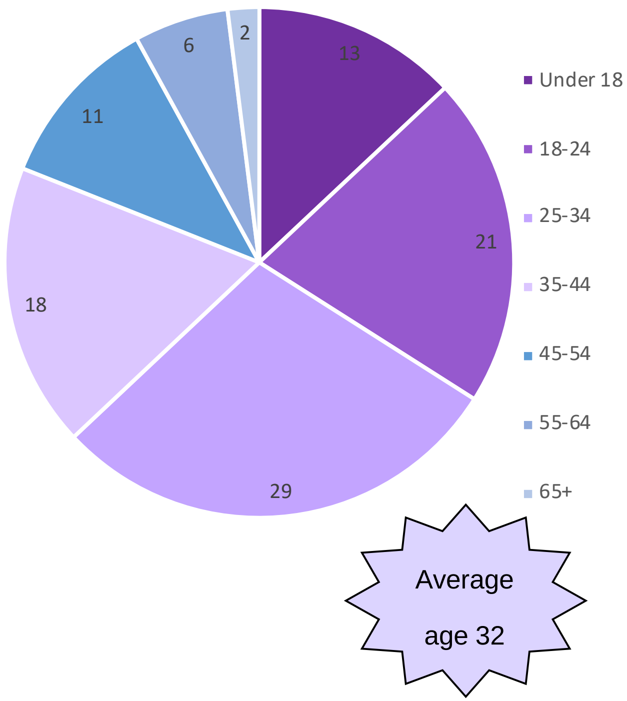
Indoor climbing is predominantly, though not entirely, a younger person's sport… the age profile of independent climbers hasn't changed.

Independent climber age split



Base: 34

Regular independent climber age split



Note 1: figures based on a mixture of customer entry data and estimates

Note 2: Averages not weighted according to size of wall

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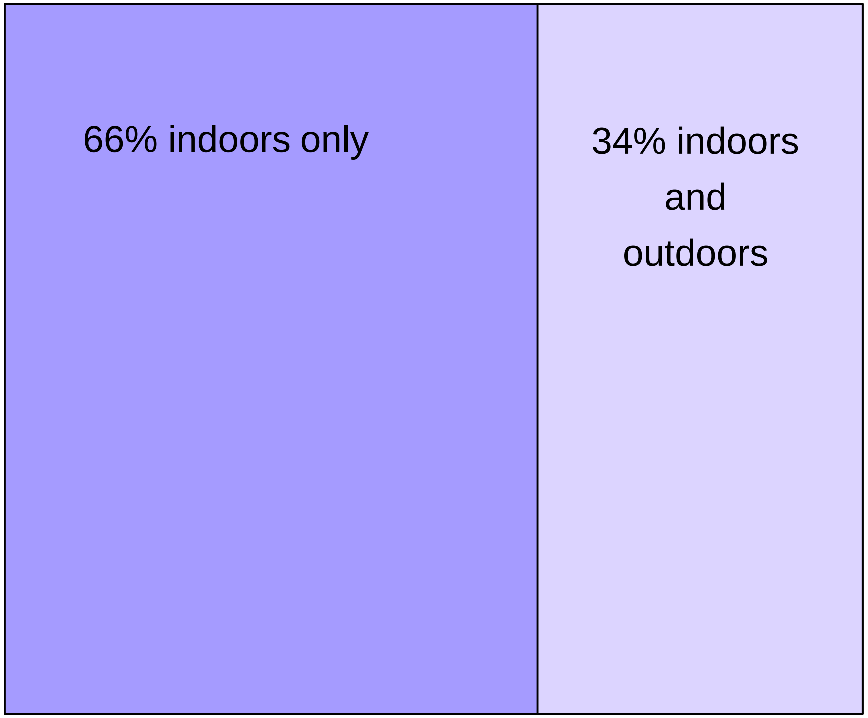
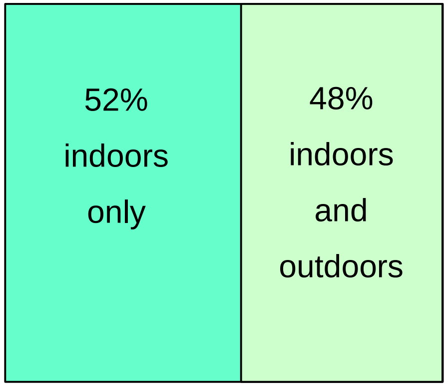
Climbing indoors is a sport in its own right… the perception is that most indoor climbers don't climb outdoors… regular indoor climbers are thought to be more likely to also climb outdoors.

Perception of where independent climbers climb



Perception of where regulars climb



Note: entirely estimated figures

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This year fewer walls report an increase in the number of independent climbers and the average increase is lower… some walls are reaching saturation point

Number of independent climbers over last 12 months has...		2017 survey
Increased	55%	80%
Stayed the same	31%	16%
Decreased	14%	4%

8% average increase

16% average increase

"It's competition from 3 new walls that are in a better location" … "we're bulging at the seams, new walls have taken some climbers because it's too busy at our wall', "we're focusing on supervised climbing"

Base: 29 (6 walls <2 years old excluded, 1 'don't know)

Note: last 12 months figures based on a mixture of customer entry data and estimates

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Most walls expect the number of independent climbers to increase… new walls are especially optimistic… increased competition and internal capacity are issues for a few... expansion and improvement is key

“Planning to revamp the wall”…”moving to a bigger site”…”about to open improved wall with auto belaying” … “we’re hoping the new build will arrest decline”

19% average increase

Expect number of independent climbers over next 12 months to...		2017 survey
Increase	75%	88%
Stay the same	19%	12%
Decrease	6%	0%

12% average increase

“We’re reaching a plateau” … “we’re getting to critical mass” … “no more capacity” …”going to close the wall and convert the space to alternative usage, it’s too small”… “3 new walls are possibly opening in the area”… “expect less of an increase next year because 2 new bouldering walls are opening nearby”

Base: 36

Over half a million U18s have climbed indoors under supervision* in the last 12 months... a 42% increase since 2017… mostly derived from smaller walls

Under 18s climbing supervised* in the last 12 months				2017 survey
Wall size	**Average # per wall**	**# walls in UK (master list)**	**Gross #**	**Gross #**
Large	3,197	65	207,817	200,879
Medium	2,372	77	182,653	115,920
Small	1,611	107	172,404	77,921
TOTAL			**562,873**	**394,721**

\+

U18s climbing supervised at non commercial, private and other walls not covered by this survey, e.g. schools

Base: 21

Note 1: figures based on customer entry data and some estimates
Note 2: many walls found it difficult to count supervised climbers
*either with school or a youth group, as part of an award scheme, having lessons or at a party

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This year most walls continue to report a similar increase in the number of U18 supervised climbers

13% average

Number of U18 supervised climbers over last 12 months has...		2017 survey
Increased	75%	72%
Stayed the same	7%	16%
Decreased	18%	12%

16% average

Base: 28 (6 walls <2 years old excluded, 2 ‘don’t know)

Note 1: last 12 months figures based on a mixture of customer entry data and estimates.

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Expectations for U18 supervised numbers continue to be upbeat

Expect number of U18 supervised climbers in next 12 months to ...		2017 survey
Increase	79%	88%
Stay the same	17%	8%
Decrease	3%	4%

13% average increase

13% average increase

Base: 34

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Supervised adults are a relatively small part of the indoor climbing market… around 150,000

Adults climbing supervised in the last 12 months			
Wall size	**Average # per wall**	**# walls in UK (master list)**	**Gross #**
Large	1,159	65	75,353
Medium	411	77	31,630
Small	342	107	36,626
TOTAL			**143,609**

Base: 30

Note: some adult supervised climbers will have moved on to become independent climbers so may be double counted

\+

Adults climbing supervised at non commercial, private and other walls not covered by this survey

Note 1: new question this year
Note 2: figures based on customer entry data and estimates

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Adult supervised climbing hasn't been a major growth area... 'only' half the walls report an increase

Number of adult supervised climbers over last 12 months has...	
Increased	52%
Stayed the same	37%
Decreased	11%

8%
average

Base: 27 (6 walls <2 years old excluded, 3 'don't know)

Note 1: no trend data
Note 2: last 12 months figures based on a mixture of customer entry data and estimates.

…nor is supervised climbing among adults expected to become a major growth area... 'only' half the walls expect it to increase

Expect number of adult supervised climbers in next 12 months to...	
Increase	56%
Stay the same	41%
Decrease	3%

25%*

average

Base: 34

Note 1: no trend data

*Due to one new wall expecting a 500% increase!

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Approaching 8 million visits have been made to climbing walls in the last 12 months... a 40% increase on last year

Visits made in last 12 months				2017 Survey
Wall size	**Average # per wall**	**# walls in UK (master list)**	**Gross #**	**Gross #**
Large	81,877	65	5,321,873	2,614,937
Medium	26,052	77	2,006,004	1,872,539
Small	6,932	107	533,729	1,110,938
TOTAL	39,569		**7,861,706**	**5,598,413**

Base: 34

Note: some of this increase will be due to the participation of 3 very large walls in this year's survey

+

Visits to non commercial, private and other walls not covered by this survey

Note 1: figures based on customer entry data

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In summary, indoor climber and footfall estimates are…

116,000 at least twice every 28 days

1.5 million independent climbers

50,000 least once a week

0.5 million U18 supervised climbers

150,000 adult supervised climbers

✚

Climbing at non-commercial, private and other walls not covered by this survey e.g. schools, gyms, outdoor education centre, small walls at leisure centres

8 million visits

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Climber figures for ABC and Active Lives surveys are not directly comparable

ABC Survey	Active Lives Survey
• 116,000 independent regular climbers i.e. climbed independently at least 26 times in previous 12 months • Indoor climbing only • Factual … customer database figures • Actual behaviour recorded for the previous 12 months • Assume an additional 43,000* 16-17 year old supervised climbers climbing ‘regularly’ e.g. done a course and/or award or visiting with school • Assume an additional 14,000** adult supervised climbers climbing ‘regularly’ e.g. done a couple of courses • Missing data … do ‘regulars’ always sign in?	• 315,000 aged 16+ climb/boulder ‘regularly’ i.e. have done so at least twice in the previous 28 days • Includes outdoor climbing • User point of view, so aspirational • Past behaviour does not determine future behaviour • Includes supervised climbing

* Assume 15% of 563,000 U18 supervised climbers aged 16-17, c50% of which are ‘regulars’
** Assume 10% of adult supervised climbers are ‘regulars’

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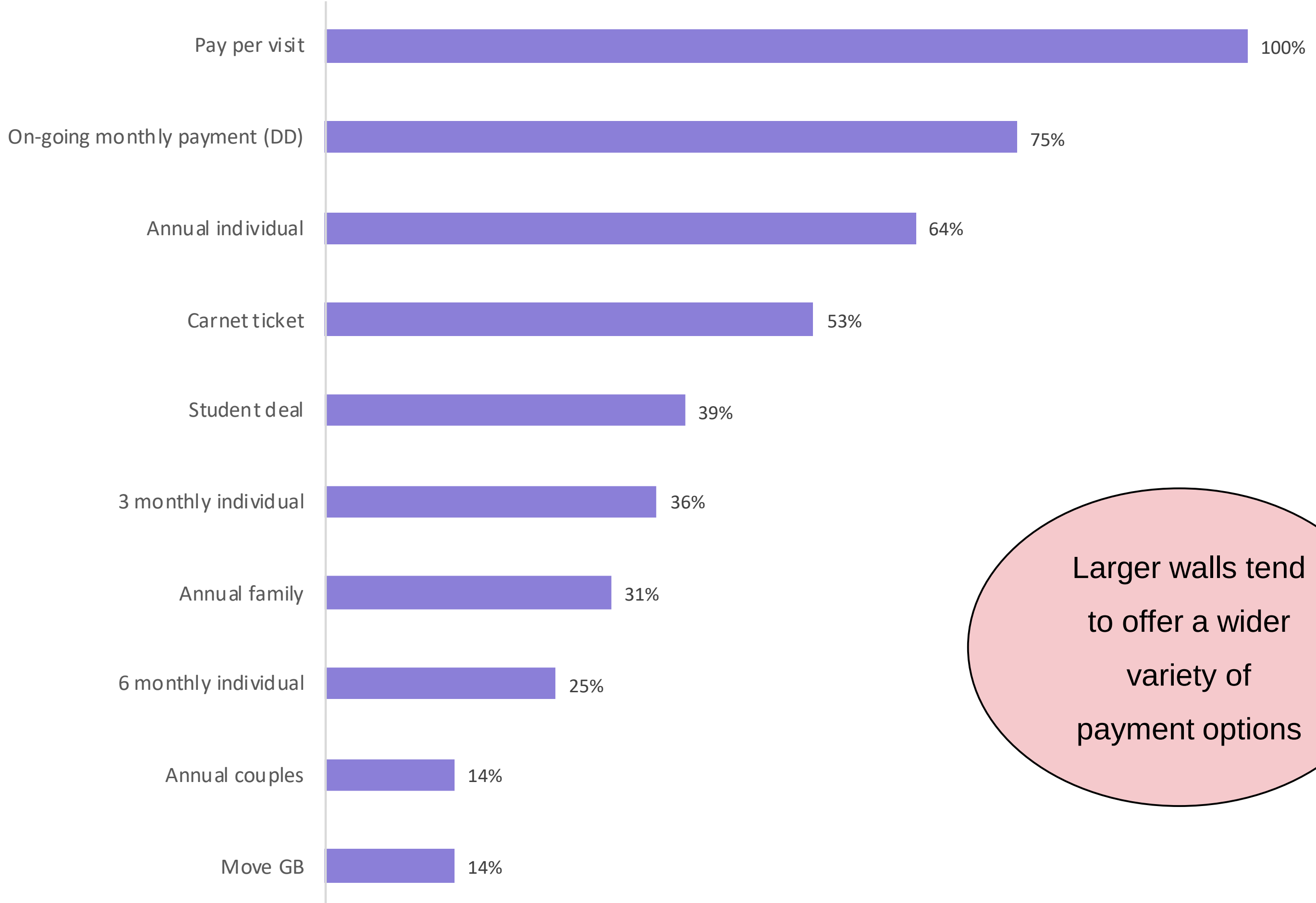
Commercial considerations

There's a wide range of payment options for customers… though not everyone offers everything.



Larger walls tend to offer a wider variety of payment options

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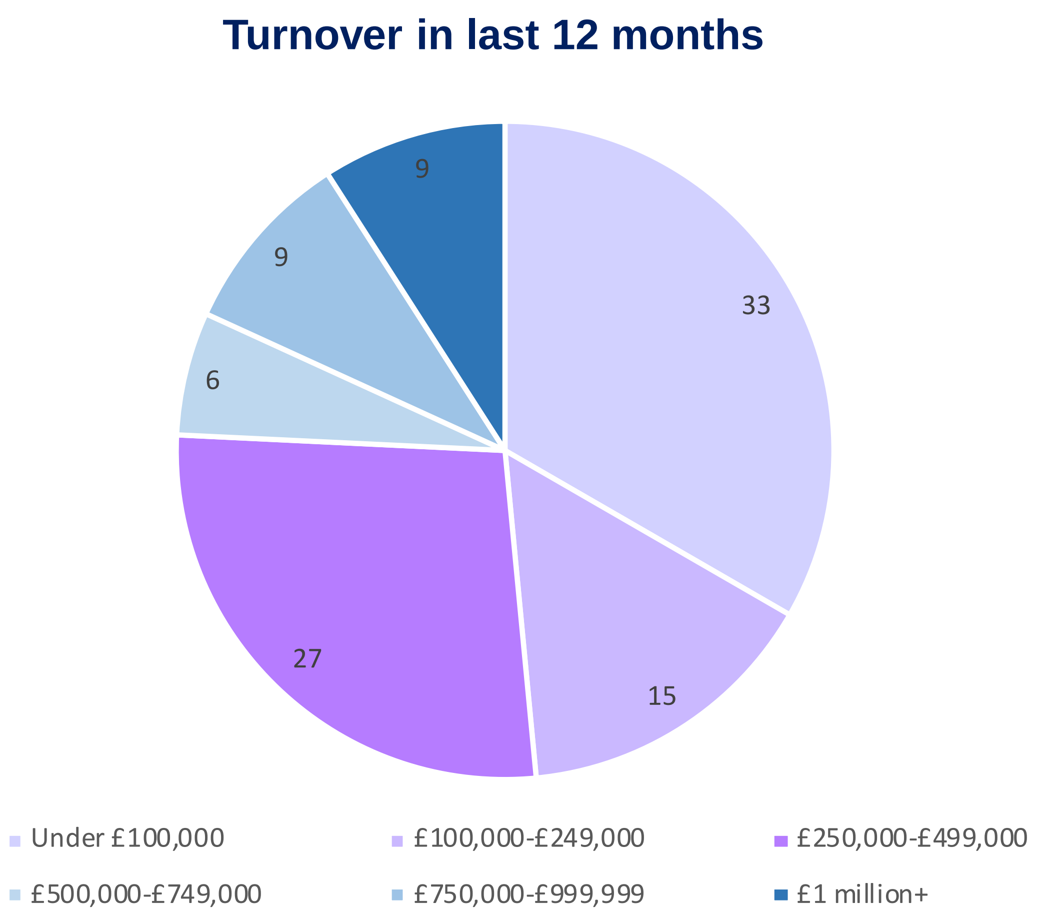
There's a wide variation in revenue between individual walls… there are some much bigger walls in this year's survey



Base: 33

Note 1: Turnover is for individual sites not groups
Note 2: The 2017 t/o question did not specify ‘gross’ t/o so some figures may have been reported as ‘net of VAT’

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Larger walls generate more revenue per customer visit...

Turnover in last 12 months			2017 Survey
Wall size	**Average turnover per wall**	**Average turnover per visit**	**Average turnover per wall**
Large	**£951,460**	**£10.50**	**£374,908**
Medium	**£299,498**	**£10.56**	**£266,117**
Small	**£41,318**	**£6.38**	**£85,950**
TOTAL	**£450,997**	**£9.00**	**£246,021**

Note: 2 large and 3 medium walls reported partial t/o because they opened less than 12 months ago

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This year most walls continue to see an increase in revenue... larger walls have been more successful than smaller walls

All the large walls have increased their TO (by 6% on average)… half of the small walls report a decrease

Turnover over in last 12 months has...		2017 survey
Increased	76%	79%
Stayed the same	0%	8%
Decreased	24%	13%

"We were hit hard by the hot summer, unlike city based walls where there's a captive market" … "It was a very hot summer so people were going outside (not just to climb), plus it had been a bad summer the previous year and there was the novelty element of something new in town"

Base: 25 (6 walls <2 years old excluded, 5 'don't know)

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The vast majority of walls continue to be optimistic about future revenue, though not quite as universally as in 2017 … competition or restructuring are the main reasons for any expected decline

Expect turnover over next 12 months to...		**2017 survey**
Increase	82%	96%
Stay the same	6%	4%
Decrease	12%	0%

“Because of the opening of our sister wall” … “3 new walls will be opening”…”Had a pricing restructure to undercut other bigger walls” …”We’re closing the wall because it’s too small”

Base: 34

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Climbing walls offer a lot of part time work, zero hours work and work for freelancers... zero hours less evident in large walls

Average number of employees in medium and small walls and FTE jobs similar to 2017

Wall size	Average number of employees (inc zero hours)	% employing zero hours staff	Average number of freelancers	Average full time equivalent jobs (inc wall employees and freelancers)
Large	25	33%	8	15
Medium	14	66%	8	7
Small	6	50%	2	2
TOTAL	15	50%	6	8

Freelancers are mostly route setters and instructors, occasionally technical advisers

Note 1: averages of Large walls skewed upwards by one very large employer

Base: all

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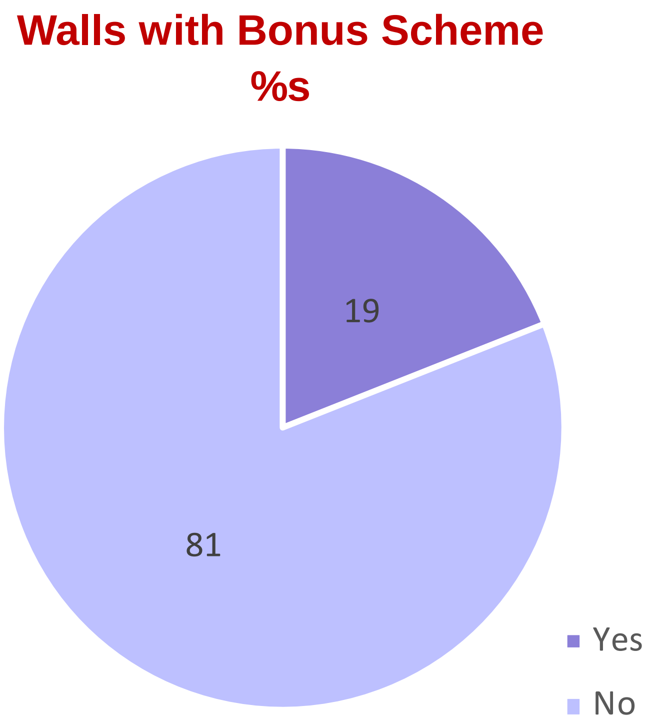
Climbing walls do not generally have bonus schemes for staff…



Tends to be for senior staff, occasionally for instructors and/or staff, sometimes informal. Generally 5% of salary or % of turnover

Base: 36

Salaries are higher in larger walls and in the South…

Wall size	Centre manager average annual salary	Duty manager average pay per hour	Internal route setter average pay per day
Large	£26,600	£10.40	£82
Medium	£25,700	£10.30	£75
Small	£23,600	n/a*	n/a*
TOTAL	£25,400		

* Not applicable because staff undertake multiple roles, often within leisure/sports centre

Pay is higher in South/Midlands:
Centre manager average: £28,800 (large walls), £27,100 (medium walls)
Duty manager average: £11.22 (large), £10.67 (medium)

Base: 27

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Commercial conclusions

- Average turnover per visit is £9 (= turnover/total number of visits)
- There's a wide range of payment options
  - Not everyone offers everything
  - 75% offer on-going monthly payment
- Walls provide a lot of part time and freelance work … and zero hours
- The average centre manager salary is c£25k … higher in larger walls and those based in the South/Midlands

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