



**British Mountaineering Council: Membership Survey 2010**

FINAL Report

**Sport Structures Ltd**

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## Executive Summary

### Introduction

The British Mountaineering Council (BMC) is the national representative body for England and Wales that exists to protect the freedoms and promote the interests of hill walkers, climbers and mountaineers. The BMC undertook a member survey in 2000 but acknowledged that over the last ten years there have been many changes in the membership and the services offered. It was therefore decided to undertake a member survey in 2010 to gather feedback from the membership to improve services and inform work areas.

The 2010 member survey was distributed as a hardcopy form to approximately 62,000 members for a period of eight weeks via the March edition of Summit magazine. In total, 6,500 completed responses were returned to the BMC from which a sample of 2506 were selected at random for analysis to give a robust confidence level. More details on the methodology can be found in appendix A. This report seeks to provide a concise overview of the findings and provide recommendations as outlined within eight core sections:

**Member profile** – Response to the member survey 2010 provides a robust sample which generally reflects the profile of the overall membership. In terms of representation within the membership profile the one area for further investigation relates to the lower level of black and minority ethnic members. The BMC is currently addressing this via its equity steering group.

**BMC Membership** – Over one fifth of respondents have been a member of the BMC in excess of 10 years. Although this indicates a good level of retention consideration should be given to capturing more data relating to those individuals that do not renew.

Individuals tend to join the BMC to access travel insurance, register for mountaineering awards and to support the work of the BMC. This

is somewhat different to the reasons for membership renewal as existing members mainly rejoin to support the work of the BMC and to benefit from the travel insurance. Marketing approaches could be tailored to reflect these differences.

Over a quarter of all members are members through a BMC affiliated club. However this could be almost doubled if all members that are interested in joining a club become part of a club. Over 96% of club members are satisfied with their club membership and over 70% feel that it demonstrates good value for money.

**Mountaineering interests** - Members take part in a diverse range of activities with the three most popular activities seen to be hill/mountain walking, rock climbing and indoor climbing. Although all members should be encouraged to take part in all activities, targeted marketing to segments of the membership could be beneficial. For example there are some differences in the primary activity chosen by male and female members with more men opting for activities such as winter/ice climbing, alpine expeditions and ski mountaineering.

A high number of members take part in outdoor activities external to the BMC, therefore consideration should be given to how the BMC can coordinate with other governing bodies involved in these sports as a potential route to promoting interest in BMC membership.

**Mountaineering Background** - There is a high level of interest in gaining formal qualifications to lead or instruct in hill walking, climbing or mountaineering. Therefore those members that wish to receive information on qualifications should receive the relevant information to capitalise on initial interest. There should be a review of the delivery of leader and instructor training opportunities to ensure that demand can be catered for.

**Outdoor Marketplace** - Members are prepared to spend money on equipment and clothing although only around a third of members have made a purchase from the BMC online shop. Further research is required to gain an insight into what products are bought and what ways members can be attracted to purchase online.

Summit magazine and the BMC website are the most popular media amongst members, with limited membership use of the BMC community site. These channels of communication should be further maximised to inform and receive feedback from the membership.

**Travel Plans** - Members are wide ranging in their travel plans with most planning to travel overseas for hill walking, climbing and mountaineering in the next 12 months, with the majority of members intending to visit Europe.

**BMC work areas & services** - The BMC should continue to ensure that it delivers against the priorities perceived by the membership, this may include a reassessment of the work undertaken for some services.

The highest priority work areas and services:

- access, conservation and the environment
- equipment, technical and safety advice
- BMC travel and activity insurance
- £10million third party liability insurance

The lowest priority work areas and services:

- indoor climbing wall competitions and the British team
- supporting and advising indoor climbing walls
- BMC online shop
- discounted magazine subscriptions

**Distribution of findings** - A summary or headline document of the study findings should be circulated to members through Summit magazine and online.

**Renewal of study** - The member survey should be renewed every five years and where possible, complemented with smaller surveys or focus groups that collect data from targeted sections of the membership. Online and hardcopy survey should be used with an option for a free text response.

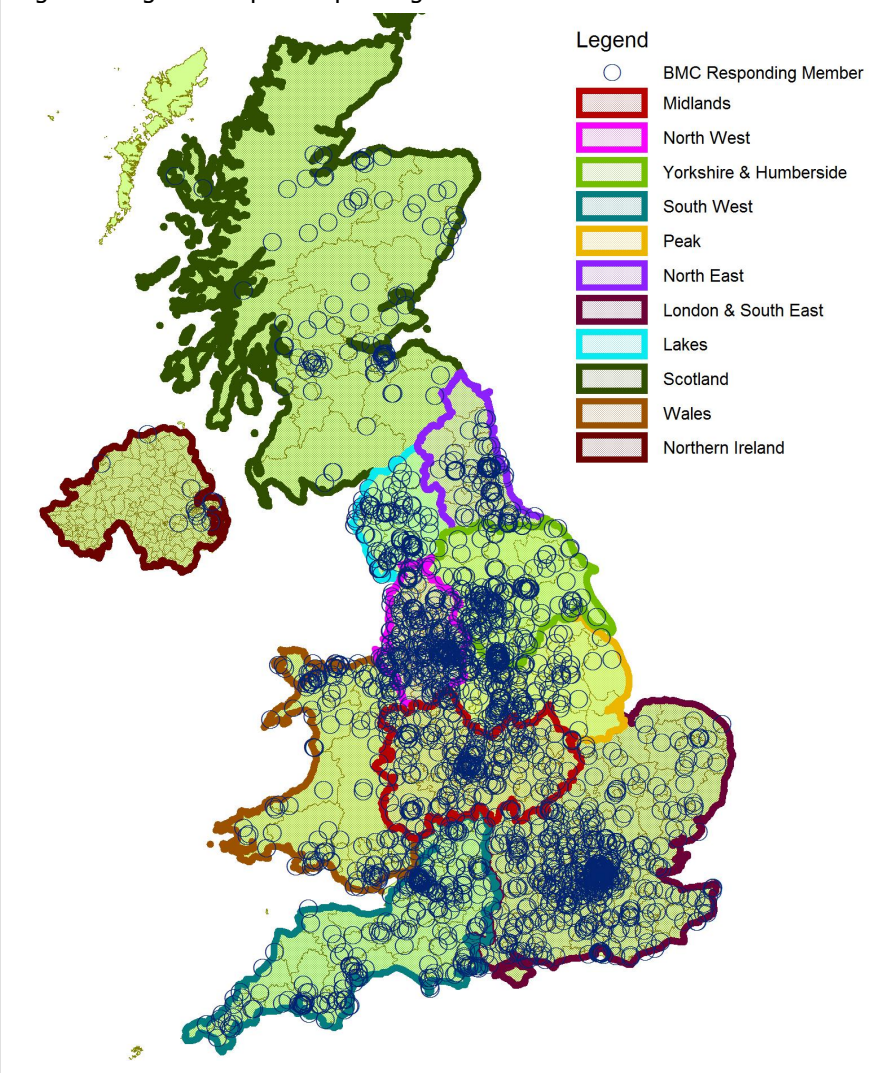
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## **1 Introduction**

- 1.1 The British Mountaineering Council (BMC) is the national representative body for England and Wales that exists to protect the freedoms and promote the interests of climbers, hill walkers and mountaineers, including ski-mountaineers. It has around 70,000 members of which 40,000 members are individual with the rest being affiliated to a mountaineering club. The BMC actively seeks to work for climbers, hill walkers and mountaineers to improve and inform its members on access and conservation, equipment & medical advice, guidebooks, safety and skills, clubs and huts, competition, climbing walls as well as youth and equity.
- 1.2 This report forms the consolidated overview of the BMC Membership survey as distributed to members through the March 2010 edition of its membership magazine Summit. The data contained within this report is based on a sample of 2506 responses. Please see details of the methodology and confidence intervals within appendix A.
- 1.3 This report seeks to provide a concise overview of the key findings outlined within seven core sections:
  - 1. Member profile
  - 2. BMC Membership
  - 3. Mountaineering interests
  - 4. Mountaineering background
  - 5. Outdoor market place
  - 6. Travel plans
  - 7. BMC work areas & services
- 1.4 The report is concluded with recommendations for the BMC on how to use the findings from the member survey to improve services and inform areas of development.

Figure 1 Regional map of responding members



## 2 Findings

### Member Profile

- 2.1 The regional distribution of BMC members demonstrates that London & South East (24.6%) has the highest number of members followed by the North West (12.7%) and South West (12.2%). See figure 1.
- 2.2 The survey response indicates that there are more male members (79.7%) than female members (20.3%). This is consistent with overall membership data although slightly less female members responded to the survey than anticipated. Reasons for this are not apparent as images within the survey were representative of female and male climbers, hill walkers and mountaineers and prizes were unisex.
- 2.3 There are 4.3% of responding members that indicate having a disability. This is consistent with findings of the recent BMC equity survey. The nature of disabilities experienced by members tend to be a physical (47.1%) or hearing impairment (14.9%).
- 2.4 In terms of ethnicity members tend to be predominantly White – British (94.2%), White - Irish (0.5%) and White - Other (3.4%). Other black and minority ethnic groups are also apparent within the membership although there are less than 1% within each ethnic group. Those most common minority groups are Mixed – White and Asian (0.6%), Chinese (0.4%) and Other Asian (0.2%). This is consistent with findings of the recent BMC equity survey.
- 2.5 The age profile of members is diverse with members apparent within each age range from under 18 to 65 years and over. The highest levels of responses were received by those aged 36-45 years (24.7%) and those aged 46 -55 years (24.5%). See figure 2.

### BMC Membership

- 2.6 The most common type of membership held is individual or family member (71.4%), only 3.0% of which are concessionary (student, under 18 or unemployed). Less than a fifth of members are club members only (19.0%). An additional 9.2% are both individual members as well as being club members. See figure 4.
- 2.7 Membership retention can be illustrated by the number of years that members have held BMC membership, some individual members (20.9%) have had BMC membership in excess of 10 years. Although most individual members have been part of the BMC for 2-4 years (36.3%) or 5-9 years (27.7%)
- 2.8 Those factors considered in renewal differ slightly to the initial reasons for joining the BMC. When joining, access to BMC travel insurance (31.4%), and the opportunity to register for mountain training awards (31.6%) are seen as the most important, then to support the work done by the BMC for mountaineers (22.9%). From those that continue to renew their membership the main consideration for renewal was felt to be to continue to support the work done by the BMC for mountaineers (41.9%). Another important factor for renewal was the opportunity to access BMC travel insurance (25.8%). See figure 3.
- 2.9 BMC events were not seen as main factors for the renewal of BMC membership or initial reasons for becoming a member. However members have identified that they intend to participate in BMC activities in the next 12 months. The most popular BMC activities appear to be seminars/lectures/workshops (59.1%), outdoor meets (40.7%) and area meetings (30.9%).
- 2.10 In total 26.4% of respondents are members of a climbing or mountaineering club, with a further 25.7% of members indicating that they would like to become a climbing or mountaineering club member. In looking at more detail at club members there is a

Figure 2 Age of responding members

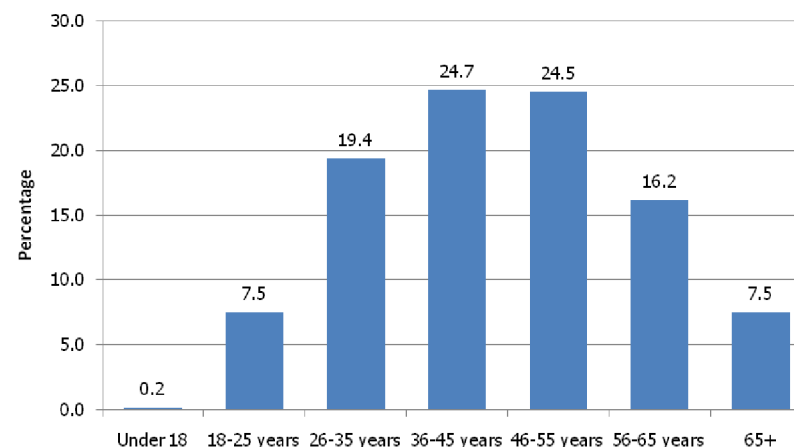
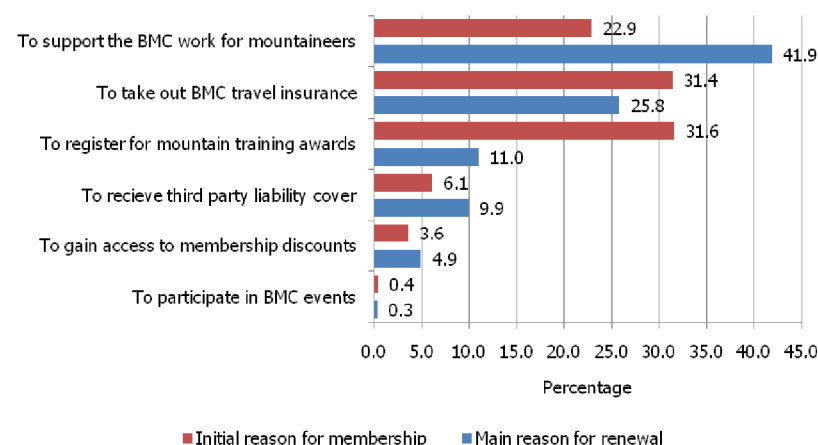


Figure 3 Reasons for initial BMC membership and renewal





similar percentage of male members as female members interested in joining a club. Whereas when looking at age those respondents aged 18-25 are more interested in joining a club. Over half of respondents aged 45 and over are not interested in joining a climbing or mountaineering club.

- 2.11 Those respondents that have their membership through a club have a proportion (£11.75) of their annual club subscription allocated to pay for their BMC membership. In assessing value for money of their BMC membership through their club the majority feel that they receive good value for money from their membership (70.8%). With only 3.6% suggesting that they had poor value for money. Of the club members who responded, the vast majority (96.1%) are satisfied with their BMC membership.

#### Mountaineering interests

- 2.12 Members indicated their three primary mountain-related activities. The most popular activities were hill/mountain walking, rock climbing and indoor climbing. In total 86.6% of members indicated hill/mountain walking as one of their primary mountain-related activities. 61.7% had hill/mountain walking as their primary activity. Several members (12.5%) only selected hill/mountain walking as their primary mountain-related activity and did not select a second or third activity. See figure 5.
- 2.13 Rock climbing was categorised as separate from bouldering. Rock climbing was indicated by 61.6% of the membership as one of their primary mountain – related activities compared to 13.9% for bouldering. Indoor climbing was also seen by members (37.3%) to be one the top three activities.
- 2.14 In looking at differences in the profile of members in relation to their three primary mountain-related activities there are some differences in preferences by male and female members. More men selected winter/ice climbing, alpine/expedition and ski mountaineering as their first activity compared to women. With

Figure 4 Membership categories

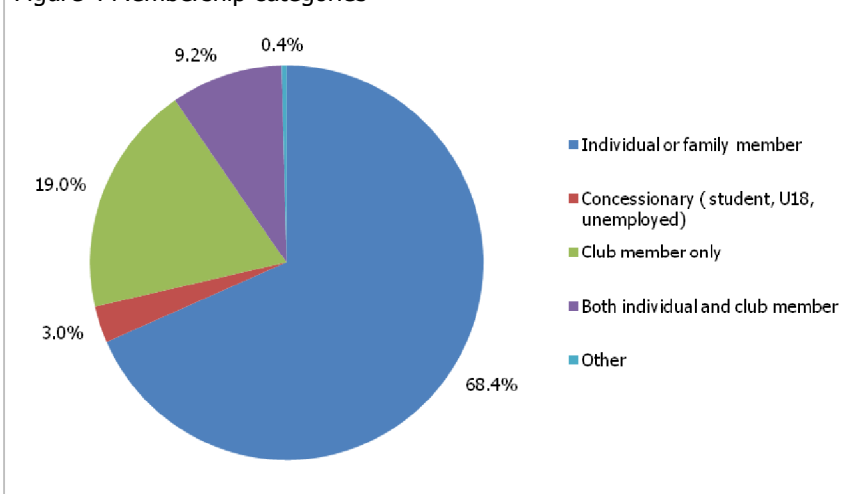
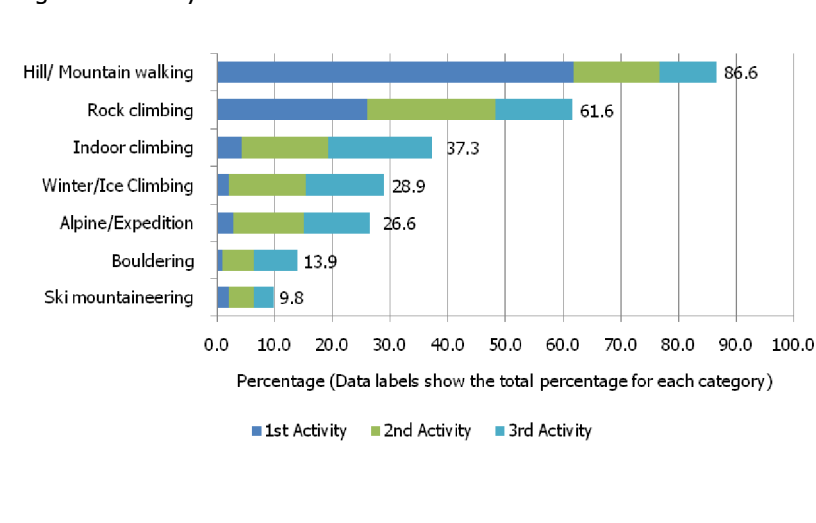


Figure 5 Primary mountain-related activities





more women selecting indoor climbing and bouldering as their first activity compared to men. A similar number of men and women selected hill/mountain walking and rock climbing.

2.15 The frequency of taking part in activities varies between each activity and season. A high proportion of members take part in hill/mountain walking in Summer (98.8%) with slightly fewer taking part in Winter (95.4%). The frequency of activity also differs between the seasons with 77.7% of members going hill/mountain walking at least once a month in Summer compared to 58.5% going once a month in Winter. See figure 6.

2.16 Just less than three quarters of members (74.2%) take part in rock climbing outdoors (including bouldering), with most (41.7%) taking part at least once a month. As many as 19.9% take part in rock climbing weekly. Of those members that rock climb (including bouldering) 83.3% trad climb and 58.5% sport climb. Most members take part at trad grades below extreme grades and sport grades below French 7a. See figure 7 & 8.

2.17 Compared to rock climbing outdoors a similar proportion of members take part in indoor climbing (72.3%), although only 3.5% take part in indoor climbing competitions. Nearly half (46.6%) of members take part in Winter/ice climbing with most members (33.5%) taking part less than once a month.

2.18 A lower proportion of members take part in alpine mountaineering/expeditions (49.5%) and ski mountaineering (16.3%) than take part in other activities. These activities tend to be participated in less often with those undertaking alpine mountaineering/expeditions mostly (39.6%) taking part just once a year. Of those taking part in ski mountaineering most (7.2%) will take part for 1-2 weeks per year.

Figure 6 How often members take part in activities

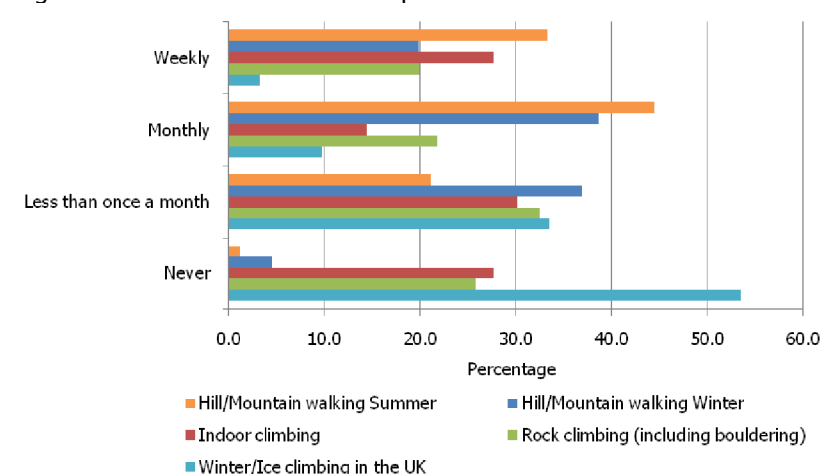


Figure 7 Trad lead climb standards

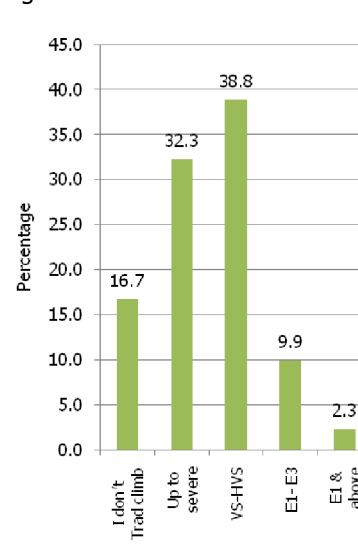
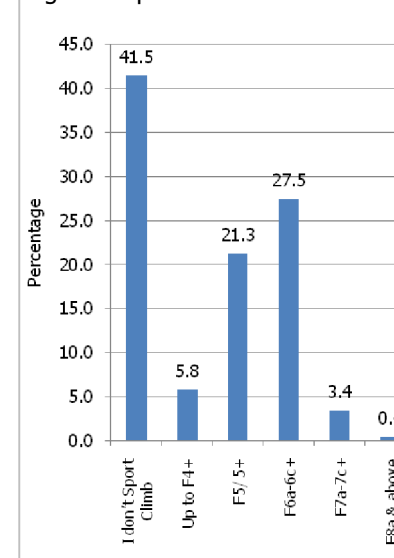


Figure 8 Sport lead climb standards



2.19 Over 90% of members take part in outdoor activities in addition to those supported by the BMC, the most popular is mountain biking/cycling (65.6%), whilst over half of members also undertake trekking (51.9%) and skiing (50.5%). See figure 9.

#### Mountaineering Background

2.20 The majority of members (67.0%) do not currently hold any qualifications to lead or instruct in mountaineering, climbing or hill walking. Of those members that do not have a qualification 33.8% would like to hold a qualification, with most (69.9%) wishing to gain a qualification in hill walking. This differs for those that already have a qualification, as almost half (49.4%) of those members that currently hold qualifications wish to gain further qualifications, with most (61.2%) wishing to gain a qualification in mountaineering. See figure 10.

2.21 There seems to be a significant number (41.5%) of members interested in gaining formal qualifications to lead or instruct in mountaineering, climbing or hill walking. However, only 28.5% would like to receive more information about qualifications from the BMC/Mountain leader training.

2.22 In looking in more detail at the profile of members with qualifications there are significantly more male members (79.3%) with qualifications than female (20.7%). In contrast when looking at those that are interested in gaining qualifications there is no difference in the level of interest from male and female members. In terms of age the majority of those with qualifications are aged 36-45 years. The level of interest in gaining qualifications appears to increase with age peaking at those aged 36-45 for hill walking, and those aged 26-35 for climbing and mountaineering.

#### Outdoor marketplace

2.23 The level of spend by members on mountaineering clothing and equipment over the last year differs significantly, with members paying less than £100 up to in excess of £2000. Two-thirds of

Figure 9 Other activities that members participate in

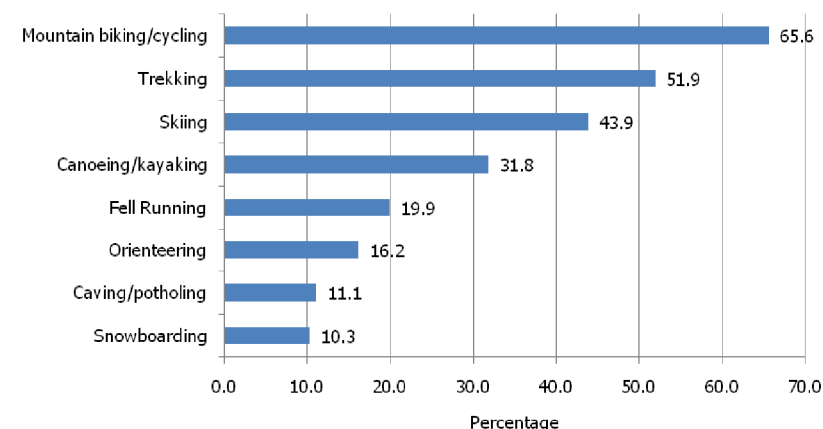
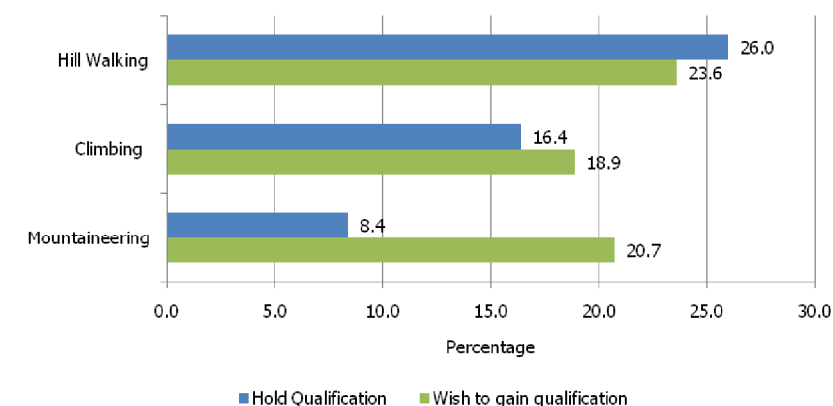


Figure 10 Qualifications held or wished to be gained by members



members (65.7%) have spent between £100 - £500 in the last 12 months. See figure 11. Although all members have appeared to make clothing and equipment purchases over the last 12 months only a third of members have ever made a purchase from the BMC online shop. In looking at the profile of those making a purchase from the BMC online shop a greater proportion of male members have indicated using the service compared to female members.

2.24 The most popular outdoor magazine read by members (77.0%) is Summit magazine produced by the BMC. Summit magazine has a wide readership as although half of members just read the magazine themselves, 45.2% share their magazine with 2-3 people, whilst others share it with 4 or more people. Other popular magazines read by members included Trail, Climber and Climb with a readership of 36.5%, 23.1% and 21.2% respectively.

2.25 The most frequently visited website was the BMC's home site [www.thebmc.co.uk](http://www.thebmc.co.uk) accessed by 74.0% of members. Although the level of visits to the main site are relatively high, significantly fewer members (26.3%) have visited the community site on [www.thebmc.co.uk](http://www.thebmc.co.uk). External to the BMC, half of all members regularly visit [www.ukclimbing.com](http://www.ukclimbing.com).

#### Travel Plans

2.26 The majority of members (80.4%) intend to go climbing, hill walking or mountaineering overseas in the next 12 months. Of which 37.7% suggest that they will go only once compared to 14.4% that plan to go more than three times. Of those intending to go overseas most (36.6%) expect to go for 1-2 weeks, although some members have more substantial travel plans and are intending to be overseas for more than a month.

Figure 11 Level of spend on clothing & equipment in the last year

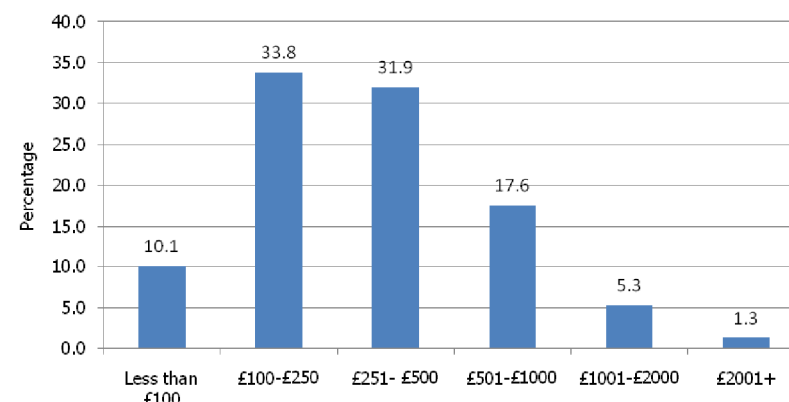
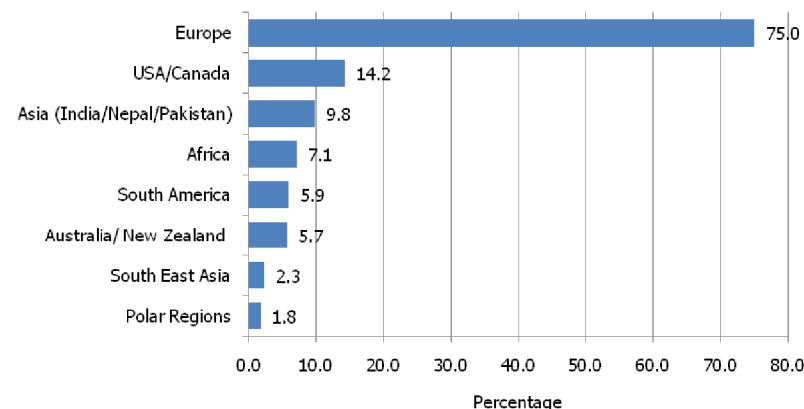


Figure 12 Overseas destinations



2.27 The most common destination for members (75.0%) travelling overseas for climbing, hill walking or mountaineering is Europe. USA/Canada and Asia (India/Nepal/Pakistan) are the next most popular destinations. See figure 12.

#### BMC work areas and services

2.28 The BMC identified eight core work programmes that comprise the work that it delivers. Members reviewed these work programmes to provide a rating for those that they perceive to be a high priority for the BMC and those that should be less of a priority. Access, conservation and the environment was seen as the highest priority followed by equipment, technical and safety advice. See figure 13.

2.29 Involvement with climbing walls were seen to be lower priorities including indoor climbing competitions, the British Team and supporting and advising indoor climbing walls.

2.30 In terms of seven identified BMC services, members felt the highest priorities were the BMC travel and activity insurance and the £10million third party liability insurance. Those services that were seen to be lower priorities were the BMC online shop and discounted magazine subscriptions. See figure 14.

Figure 13 Members priority for BMC work programmes

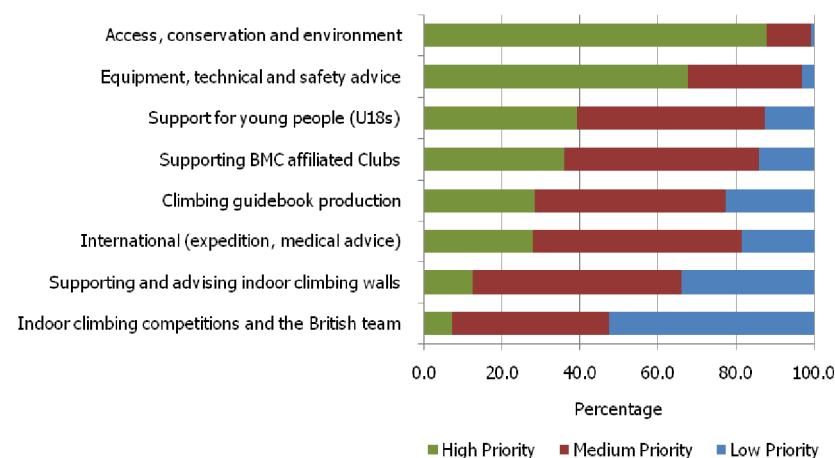
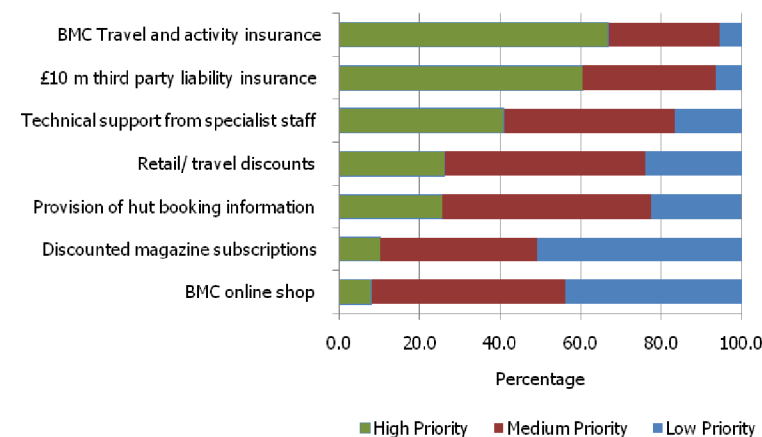


Figure 14 Members priority for BMC services



### 3 Conclusions and Recommendations

#### Members profile

3.1 The profile of the members to respond to the survey provides a robust sample of the overall membership, with the level of response from the demographic breakdown closely reflecting the overall membership. Although the survey provides a good reflection of BMC members profile there is a need to consider:

- The lower level of representation from black and minority ethnic communities. It is recommended that a series of focus groups are set up with members and non members from black and minority ethnic communities to try to establish how underrepresentation can be approached.
- Inclusion of these findings within work towards the Equality Standard for Sport.

#### BMC Membership

3.2 There appears to be a good level of membership retention with over one fifth of members being part of the BMC for 10 years or more. Although outside of the parameters of this study consideration should be given to capturing more data relating to individuals that let their membership lapse.

3.3 Individuals taking part in hill walking, climbing or mountaineering initially become either an individual or club member of the BMC so that they can access travel insurance, register for mountaineering awards and offer support to the work of the BMC. Whereas the most popular reasons for members to renew their membership is to support the work of the BMC followed by accessing travel insurance. There is the opportunity for tailored marketing approaches to be aimed at gaining new members and marketing targeting existing members to renew their membership. This promotion could highlight both the work done by the BMC and the benefits of travel insurance.

3.4 There is the potential to strengthen the level of club membership by converting those members that are interested in joining a club to become club members. The profile of those wanting to join a club tends to be both male and female members that are in the younger age ranges. Almost all club members appear satisfied with their BMC membership and feel that it demonstrates good value for money. This membership process through club affiliation should be continued.

#### Mountaineering interests

3.5 Members take part in a diverse range of activities with the three most popular activities seen to be hill/mountain walking, rock climbing and indoor climbing. There were some differences in the primary activity chosen by male and female members with more men opting for those activities that could be perceived as more high risk such as winter/ice climbing, alpine expeditions and ski mountaineering. These findings could be used to direct marketing approaches and information that reflects these preferences, although care should be taken to support all members in their chosen activities.

3.6 BMC members appear to have a range of interests with the majority of members indicating taking part in more than one activity supported by the BMC. In addition more than 90% of members take part in other outdoor activities with the most popular being mountain biking/cycling, trekking and skiing. Consideration should be given to how the BMC can coordinate with other governing bodies involved in these additional activities as a route to potentially increasing interest in BMC membership.

### Mountaineering Background

- 3.7 There is a high level of interest in gaining formal qualifications to lead or instruct in mountaineering, climbing or hill walking. Both male and female members are keen to gain qualifications with the level of interest reducing with age.
- 3.8 Those members that wish to receive information on qualifications should be followed up with direct communication to capitalise on initial interest and the level of leader and instructor training opportunities should be reviewed in line with demand. Further investigations may be required to establish why members have not already become involved with the qualification framework.

### Outdoor Marketplace

- 3.9 Members spend in the last year provides an indication of potential spend in the next 12 months. Where possible the BMC should seek to improve their commercial opportunities within the market place specifically through the promotion of the online shop which has led to purchases from around a third of members. Further market research is required to understand what products are bought via the BMC online shop and how more members can be attracted to complete a purchase.
- 3.10 Summit magazine and the BMC website are popular amongst members. These regular communication channels should continue to be a focus for informing and updating the membership. There is opportunity to develop the use from members of the separate community site.

### Travel Plans

- 3.11 Members are wide ranging in their travel plans. More than 80% intend to go climbing, hill walking or mountaineering overseas in the next 12 months.

- 3.12 A third of members intend to only visit Europe, however it is apparent that some members will travel to far ranging destinations so will require a different level of advice or support.

### BMC work areas & services

- 3.13 The two highest priority work areas undertaken by the BMC are identified by members as access, conservation and the environment followed by equipment, technical and safety advice. Those that were the lowest were in relation to indoor climbing walls.
- 3.14 Members highlighted the BMC travel and activity insurance as the highest priority to the services on offer by the BMC, closely followed by the £10million third party liability insurance. Those services that were seen as a low priority are the BMC online shop and discounted magazine subscriptions.

### Distribution of findings

- 3.15 The findings from this study should be shared internally within the BMC to inform and evidence actions undertaken to improve services to members. A summary or headline document should be produced for wider circulation to members through Summit magazine and online. Communication of the findings should assist in strengthening the relationship with the members and demonstrate the value given to their feedback.

**Renewal of study**

- 3.16 This member survey comes ten years after the previous study conducted in 2000. Although membership surveys of this scale should not be repeated too frequently it is recommended that a consistent and comprehensive member survey should be collected every five years. This could be complemented with smaller targeted surveys or focus groups with specific member groups.
- 3.17 It is recommended that a similar methodology is undertaken for renewal of the study; however consideration should be given to a mixed method of data capture through both hardcopy and online surveys. Although more time-consuming to analyse an open comments box may also have provided valuable qualitative data to support responses.



## Appendix A: Methodology and limitations

### Methodology

The questions contained in the member survey 2010 were based initially upon those questions within the previous member survey released in 2000. The questions were developed into eight concise sections for ease of use. Only closed questions were included in order to produce focused quantitative responses. To reduce analysis no open response questions were included. An internal pilot was undertaken within the BMC with a focus group of staff and members to check the understanding and interpretation of questions in order to ensure the validity of response.

The 44 questions were designed as an A4 six page (two fold) full colour hardcopy form sponsored by Berghaus. The format was produced to ensure that scanned data entry could be utilised. The survey included incentives in the form of four high value prizes (Equipment, DVDs and Maps) that could be won through a prize draw process. The member survey was distributed for a period of eight weeks (From 12<sup>th</sup> March to 14<sup>th</sup> May) using the March 2010 edition of Summit magazine as the distribution mechanism which was circulated to approximately 62,000 members. Enclosed within Summit magazine was the hardcopy survey and return envelopes addressed to the BMC.

In total 6,500 completed responses were returned to the BMC from which a sample of 2506 were randomly selected as a sample for analysis. The sample provided a robust level of confidence in the results. See table below for the confidence intervals from the sample:

	%	+ or -
Confidence Intervals at a 95% confidence level Based on 2506 responses from a population of 62000	5 or 95	0.84
	10 or 90	1.15
	20 or 80	1.53
	30 or 70	1.76
	40 or 60	1.88
	50	1.92

PASW Statistics 18 (SPSS<sup>TM</sup> - Statistical Package for Social Sciences) was used as a platform for the processing of quantitative data through the use of statistical techniques. The data produced from the analysis can be reviewed within the BMC Membership Survey Final DATA report which is available from the BMC on request.

Initially an interim DATA report was produced during the data collection. Based on a sample of 1000 responses this enabled data cleansing and analysis processes to be checked for bias prior to the final sample being selected. Finally this report has been produced to provide an interpretation of the key findings from the survey to inform the future activity of the BMC.

### Limitations

The distribution method relied upon members receiving and acting upon the hardcopy survey provided to them within Summit magazine (envelopes were not pre-paid). No further promotion of the survey was undertaken with the membership during the collection period.

It has been noted that in comparison to the total membership numbers there is less representation in the survey response from those aged under 25 years. To capture responses from this age group an online version of the survey may have been more accessible/appealing.