

Sport and Exercise - Ten Year Trends - UK - July 2010

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What is this report about?

Sport and exercise are now amongst the UK's most important leisure markets in both volume and value terms, with Britons playing more and spending significantly more than they did a decade ago. But the country's health problems are as persistent today as they were in 2000 and participation patterns suggest most of us are only playing at sport rather than pursuing it with sufficient vigour to improve our lives.

More positively, though, consumers are becoming more aware of the free or low-cost exercise opportunities that exist around them and are beginning to act on their own initiative in taking advantage of them.

What have we found out?

- More than 30 million adults now take part in sport and exercise at least monthly, a 15% increase on 2000 levels – but fewer than a third of these do so at the recommended level of three times a week or more often.
- Spending on sports participation, clothing and equipment is estimated to have risen by nearly 50% over the last ten years, to be nearing £10 billion in 2010. Growth rates are likely to be reduced over the next five years as the government's austerity programme impacts on both public supply and consumer demand.
- Jogging, cycling and hiking have all gained share on long-time leaders swimming and aerobics – suggesting consumers are looking for cheaper and more stimulating participation environments. The former require payment to play whereas the only outlay required for the latter is on equipment – also suggesting demand for free play is on the rise.
- The male bias in exercising more than once a week that existed in 2000 has been eroded, suggesting women have been quicker to take the frequent exercise message on board. Private gyms are being sustained by female participants, who have become far more willing to swap public centres for parks, which are also attracting an increasingly affluent demographic.
- Having a friend or family member to start a sport with is the second most likely factor to motivate consumers to try something new, and is a more important factor for women than it is for men.
- Charity events have an above average influence on 25-44-year-olds in terms of motivations for trying a sport – consumers in this age group are often returning to exercise after a period of inactivity, and need a kick-start.

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