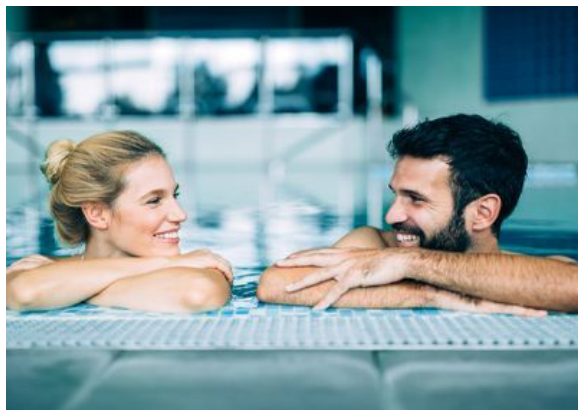


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“Public leisure centres and swimming pools have been badly hit by the COVID-19 crisis and face a long road to recovery. The pace at which they move along it will be determined by the government’s appetite for state support and the ability of operators and local authorities to move beyond the business models of the age of austerity.”

– **David Walmsley, Senior Leisure Analyst, 24 August 2020**

This report looks at the following areas:

- The impact of COVID-19 on consumer behaviour and market dynamics in the leisure centres and swimming pools market
- The concerns operators will need to address to give customers confidence to return
- The need to rebalance revenues between the market’s swimming and fitness segments
- The role leisure centres and swimming pools can play in delivering the ambitions of post-pandemic public health policy
- The value of expanding the leisure centre and swimming pool offer beyond current core activities.

Even before the COVID-19 pandemic struck, delays in replacing or refurbishing ageing swimming pools meant that 40% of these facilities were considered at risk of closure over the coming decade. However, the damage wrought by the crisis is such that industry associations fear that up to half of all leisure centres could be lost by the end of 2020 without urgent new financial support.

With enforced leisure centre closures extending beyond those imposed on many other business sectors during the pandemic and only around two thirds of sites re-opening by early September, the market is set to see revenues fall by 60% in 2020.

The principal threat to the sector’s long-term recovery is that it fails to resolve the underlying issues of lack of investment and unsustainable operating models that magnified the impact of the COVID-19 crisis when it struck.

The most significant opportunity for public leisure centres and swimming pools in the next normal of the post-pandemic period lies in positioning themselves as key enablers of the healthier society that changes in public policy and consumer behaviour are expected to promote.

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COVID-19 and Leisure Centres and Swimming Pools

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