

Sports Participation: Inc Impact of COVID-19 - UK - October 2020

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“Enthusiasm for sport has remained strong throughout a period in which the venue closures and operating restrictions of the COVID-19 pandemic have badly damaged market value.”

– David Walmsley, Senior Leisure Analyst, 5 October, 2020

This report looks at the following areas:

- The impact of COVID-19 on consumer behaviour and market dynamics in the sports participation sector.
- The threat to sports provision posed by ageing facilities and the weakening ability of local authorities and NGBs to replace them.
- The implications for sport of shifting consumer health priorities from physical fitness to mental wellbeing.
- The opportunities for market growth available through the convergence of physical and digital experiences in sport.
- The need for sports providers to support rising participation rates in older age groups.

Sports participants have refused to let the restrictions on physical activity imposed during the COVID-19 pandemic weaken their enthusiasm for play: 81% continued to exercise during the spring lockdown and two thirds say they would like to take part more often once the next 'normal' arrives.

The market's main problem during the pandemic is not that consumers have been unwilling to spend but rather that they have been unable to do so: the prolonged closure of many participation venues and the restrictions on activity that have accompanied their reopening are expected to depress market value by 39% in 2020.

The principal threat to recovery in 2021 and beyond is that providers are unable to fully serve this latent demand as a result of prolonged infection-control measures and the revenue crises facing the local authorities and national governing bodies (NGBs), who are the principal funders of facilities.

The next normal is also expected to be characterised by an increasing prioritisation of mental wellbeing over physical fitness as the key influence on our overall health. This presents a challenge to all sports to demonstrate their positive impact on the mind as well as the body, but also a growth opportunity for those that can do so, most likely by promoting the fun of play and putting inclusion and individual development ahead of the pressure of formal competition.

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