



Sports Participation - UK - 2022

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This report looks at the following areas:

- The impact of the growing cost-of-living crisis on sports participation.
- The speed and shape of the market's recovery from the impact of COVID-19.
- How sport and fitness preferences influence participation habits.
- How and where people pay to play.
- Willingness and reluctance to cut back on participation.

Only 16% of sports participants (and just 9% of those who play more than once a week) include sport and fitness among the top three things on which they would be willing to spend less if they need to reduce their expenditure.

This commitment to play, alongside a skew in participation rates towards the better off, gives the market some protection against the cost-of-living crisis, although the threat it poses to less affluent groups risks widening existing inequalities in play.

Access to sport is also threatened by the future of many public facilities being put at risk by a combination of operational fragility caused by the COVID-19 pandemic and the difficulties local authorities face in funding leisure services.

However, sports providers have an opportunity to tap into people's post-pandemic priorities in the short and longer term: firstly, by providing the social participation experiences they have missed and then by aligning with rising consumer interest in health and fitness.



"Sports participants are determined to maintain their activity in the face of the cost-of-living crisis but many will have to make compromises and consider trading-down options to do so."

- **David Walmsley, Senior Leisure Analyst, October 2022**

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