

# Sports Participation - UK - September 2012

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“The sports participation market faces both some old chestnuts of barriers to play and some newer, more holistic issues that can be equally restrictive on consumers’ willingness or ability to take part.

Pressure on investment in public facility provision is unlikely to ease over the short term, continued fragility of consumer confidence could keep all leisure spending under review, and finding time for sport will remain difficult for pre-family and family groups alike – the former by choice, the latter by necessity.”

– David Walmsley, Senior Leisure Analyst

## In this report we answer the key questions:

- Are there enough places people can play?
- How can more people be encouraged to play more often?
- Can government policy keep teens in the game?
- How can the entrenched barrier of cost be overcome?
- Is technology an enemy or a friend?

While the original targets for the sports participation legacy of the London 2012 Olympics have long been abandoned, recent trends in playing numbers suggest the Games may have more post-event value as a platform for driving up activity levels than cynics might expect.

This report assesses the factors underlying these current and recent trends in sports participation in Great Britain (with a particular focus on England, given the nature of the data available), examines consumers’ attitudes towards sport and identifies ways in which governing bodies, facility providers and sports brands and sponsors can help boost playing numbers in the short and medium term.

Mintel’s definition of ‘participation sports’ is based on that set out by Sport England, which states that “the purpose of the activity must be sporting and not a means to another purpose” and that it “must have an established structure, defined by rules, and where appropriate, organised national or international competition”.

Mintel’s interpretation of the second element of this extends to the inclusion of athletic activities undertaken for fitness rather than competitive purposes, such as aerobics and/or weight training in a gym, and which are therefore less formally structured in terms of their rules and organisation, but which still have an accepted means of or basis for participation.

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**Americas:** +1 (312) 932 0600  
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