

Activity Check-in

Focus on – the impact
of cost of living



The Activity Check-In tracks behaviours and attitudes from both adults, children and young people towards sport and physical activity, revealing the impacts of a rapidly changing world.

Each wave captures views on a specific topic of current relevance – in this publication we focus on the impact of the rising cost of living and how the sector can help get people active through it.

Full data sets are available on our website.

This document is for partners and organisations who work in the sport and physical activity sector. It explores our current, collective understanding and shares some ideas on how to help people get, or remain active at low or no cost.

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Activity Check-In, is conducted by Savanta ComRes via an online survey. Completed by n=2000 adults (aged 16+) and n=450 children and young people (CYP) in school years 1 to 11.

All participants live in England and data has been weighted to be representative of the English population by age, gender, disability, region and socio-economic status.

Fieldwork dates for quantitative research: Wave one 25/03/2022 and 28/03/22. Wave two 15/07/2022 and 18/07/22. Wave three 19/08/2022 and 22/08/2022. Qualitative online community: 14/06/2022 and 20/06/2022.



1. Focus on the experience to support motivation

As people go through the cycle of reviewing their finances fairly regularly, they will be assessing and evaluating their experiences – what is important to them? What are they enjoying (and a reminder that enjoyment will be different for different people)? Where are they feeling the benefits?

Consider how you can provide enjoyable, inclusive, and sociable experiences that will motivate people to be active.

'Fun classes without the focus on exercise and raising awareness of local free fitness activities really appeals to me. I want to enjoy exercise and have motivation to go - rather than just to 'be fit'

Female, 18-24, higher socioeconomic background.



2. Make accessing activities as simple as possible

In the current context, people are experiencing additional mental strain associated with worry about finances coupled with uncertainty about the future. This is likely to impact people's motivation and psychological capability to be active.

Consider how to make accessing activities as simple as possible by reducing the burden on mental bandwidth, for example:

Make it easy to sign up or take part (and so reducing friction), using local facilities which feel familiar, or instructors who are part of the local community.



3. Link people up with local activities

Many people want to do more, but don't necessarily know what opportunities are available in their area, particularly ones which are low cost.

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'I recently saw this advertisement on my Facebook page. My sons actually attend classes here and they love it and it has really encouraged me to think about joining up myself as I know that not only is it going to keep me fit but teach me self defence too which is a good inspiration to have'

Female, 36-54, lower socioeconomic background.



4. Actively communicate flexible payment options

Personal memberships are an area consumers are likely to make cutbacks to and changes on. People want to feel in control over the finances.

There is an opportunity to actively communicate flexible payment options in an empathetic way linked to organisations understanding that the rising cost of living is a challenge for people. This may help reduce anxiety and worry for some people.

Easy opt out services and no cancellation penalties are also likely to provide people with reassurance.

'Gyms to offer rolling contracts rather than fixed term so you can cancel if you need to'

Male, 36-54, higher socioeconomic background.



Resources

We have worked with partners to support and develop a range of free or no cost programmes to help people get active:

Parkrun

Free, weekly, community events and take place in parks and open spaces. On Sunday mornings, there are 2km junior parkruns for children aged four to 14.

Couch to Fitness and Couch to Fitness: Bhangra

Helping people start their journey to a more active lifestyle.

Studio You

To engage less active teenage girls with school PE lessons.

Strava partnership

'Make Your Comeback' which includes a free This Girl Club on the app This Girl Can and Strava.

Digital Marketing Hub

Learn from digital marketing experts, and do more with the digital platforms at your fingertips.



Our campaigns provide information on how to find free, fun and accessible ways to get active:

[Join the Movement](#)

[This Girl Can](#)

[We Are Undefeatable](#)

And to see what cost of living support you and your consumers could be eligible for:

[Help for Households](#)



Insight

The rising cost of living is due to converging challenges, including:

- financial legacy of the Covid-19 pandemic
- conflict in Ukraine and associated economic sanctions
- global supply chain issues
- other global instability
- inflation, tax rises and wage stagnation.

We expect the resulting increase in cost of living to negatively impact sport and physical activity more than during previous recessions due to the significance and scale of these challenges.



What this means for the sector

The increase in inflation and utility costs is having an impact on sector organisations and coincides with a time where, for some, participation levels are still recovering following the Covid-19 restrictions.

Insight suggests¹ that operators are already responding or are considering responding in a variety of ways such as, reducing the number of sessions being delivered and increasing the costs to participants through to looking for alternative venues or halting activity completely.

Closures of facilities will likely impact the workforce, changing contract types or leading to redundancies.

In past recessions we saw greater impact to more costly and indoor, winter and asset owning activities².

Certain sports and activities such as swimming or indoor fitness classes are likely to be impacted more versus walking or running.

¹ Spotted. Members Survey. Facilities: June 2022

² C. Gratton and T. Kokolakis: June 2012

The Effects of the Current Economic Conditions on Sport Participation.
Sport Industry Research Centre, Sheffield Hallam University



Key findings

Almost half of adults say that they have less disposable income today compared to a year ago.

- 2 in 5 (40%) people said the cost of living increase was having a 'negative impact' on their ability to be active in August 2022, up from a third of people in March 2022 (an increase of 6.7%).³
- Despite people reporting cost of living was negatively impacting their ability to be active in March and July, this did not seem to translate to a decrease in overall activity levels³.
- There was a reduction in overall activity levels in August however, indicating that we may be seeing the start of negative impact on activity levels³.
- Almost half of people (48%) think the cost-of-living is likely to have a negative impact on their ability to be physically active in the future.³

This is particularly concerning because it comes as the population was still to return to activity levels seen before the pandemic, with people citing barriers such as 'not feeling fit enough' and 'struggling to find the bandwidth' to prioritise being active.



Challenges facing different groups

Decline in activity levels

The impact of the cost of living is being felt across different groups of people.

People from lower socioeconomic backgrounds, those living in the most deprived places (IMD-1-3) and people with a disability and/or long-term health condition are most likely to agree the cost of living is having a significant impact on their ability to be physically active.

In contrast, people aged 55+, people without a disability and/or long-term health condition and people from the least deprived places (IMD 8-10) are less likely to agree that it is had a significant impact on their ability to be physically active.

The insight suggests that inequalities are likely to have widened, as nearly 1 in 10 (7%) of those negatively impacted have stopped activity altogether due to the cost of living increases.⁴



Changes in behaviour

We previously identified different behavioural groups. This included people cutting back because they can't afford to continue with their physical activity choices and people making choices between paid activities and/or lowering frequency. We'll cover more about these groups throughout this report.

In addition, there are people who are doing more or continuing because they recognise the benefits to wellbeing.

'I now spend a bit more money on fitness having got a gym membership, but this was because I was struggling with my mental health'

Female, 25-35, lower socioeconomic background.

Finally there are those who are not making changes because they are either able to continue to pay for activities or who were doing low cost or free activities prior to the rise in the cost of living, such as walking for leisure, and are continuing with these.



Changes in behaviour

Two thirds of adults have told us they've made changes to their sport and physical activity behaviour because of cost of living increases.

The changes cover behaviours which, in the short-term at least, have positive, neutral and negative impacts on people's activity levels.

The most common changes include:

- walking/cycling to get to places rather than using the car (20%)
- starting/increasing free activities (17%)
- exercising to socialise with friends instead of paid social activities i.e., going for a walk with a friends instead of going to a coffee shop with them (15%)
- or activity at home (13%).

Some people are switching to lower cost, more flexible memberships and/or are cancelling memberships (both gym and other sports/activities).



What's driving changes

Physical activity isn't considered an essential spend for people who are cutting back or choosing between activities or lowering frequency.

'I have stopped going to the gym. I had a gym at home but had to sell it to make ends meet. So, I don't lift weights presently. I walk more and jog more because they cost nothing'

Male, 36-54, lower socioeconomic background.

'I have had to stop swimming as I cannot afford to do that as well as pay for my gym membership'

Female, 36-54, lower socioeconomic background.

'Cutting out swimming costs in order to have the extra to pay for groceries'

Female, 35-54, lower socioeconomic background.



Differences by activity level

People who are active on 3+ days in the last week are more likely to have made at least one change to their sport and physical activity behaviour* because of the cost of living increases. They are also more likely to have made 'positive changes'* for example, walking or cycling to get to places rather than using the car.

People doing 0–2 days are less likely to be 'positively' changing their physical activity behaviours due to the rising cost of living.

The strongest indicators as to whether someone is likely to remain active are their levels of motivation and the extent of their habits.

For people who are active on 3+ days in the last week, physical activity is more likely to be a priority in their lives and they are likely to have more established, and frequent physical activity habits or routines.*

As such, we hypothesise that a higher proportion of this group have been motivated to make 'positive' changes because of the cost of living increases, in order to be physically active.

*When compared to people who are active on 0 –2 days in the last week



Activities impacted

The recovery in both swimming participation and people using gyms or attending fitness classes following the easing of pandemic restrictions seems to have stalled in July and August 2022, tracking below 2021 levels having been tracking above 2021 in January and March*.

It is likely we are seeing some impact from the cost of living increases.

- Those swimming once a week in August 2022 is reportedly lower than July 2021 (-3.0%)
- Those doing fitness in facilities once a week in August 2022 is reportedly lower than July 2021 (-3.5%)

*Overview of lockdown restrictions during 2021: 4th January –29th March 2021 England was in a national lockdown. From 29th March 2021: Outdoor gatherings with 6 people or two households allowed. From 12th April 2021: Non essential retail reopened as well as indoor leisure (e.g. gyms). 17th May 2021 : Limit of 30 people allowed to mix outdoors. Rule of 6 or two households allowed for indoor gatherings. Indoor venues re-open and 10K spectators could attend very largest outdoor seated venues. 19th July 2021: Most legal limits on social contact were removed in England.

Please note, this is Activity Check-In and Covid-19 Tracking Study data, it uses different questions and response options to Active Lives, and as such the two should not be compared.



Activities not impacted

We are not yet recording reportable increases in the following activities:

Walking is not currently showing a reportable increase.

The increase seen between March and August in informal activities and active play reflects the usual seasonal uplift we'd expect to see.

Running or jogging continues to track below 2021 levels following an increase during the pandemic restrictions.

In part, this could be due to effects cancelling each other out, while some people may be switching to free activities like running, those who are cutting back completely may have been previously doing free or low-cost activities.

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Next steps

We will continue to bring together sector partners to discuss what we are learning, are looking to understand and where we have gaps in our knowledge - to better understand the challenges on the sector and reveal the impact it is having on the workforce.

We plan to gather and share 'bright spot' examples of people consciously being more active to support their mental and physical wellbeing at this time, and good practice examples of how the sector is helping people stay active.

We need to remain agile to changes to the context such as new government measures or energy caps and continue to update our understanding.

We're interested to hear any examples of how the sector is supporting people with the rising cost of living - if you would like to contribute any insight, please contact:

Insight@sportengland.org