



The rising cost of living

and its impact on sport
and physical activity.

This report, commissioned by Sport England and System Partners (including London Sport, Sported, The Sport and Recreation Alliance, EMD UK, and Sporting Equals) and created by Sheffield Hallam University, consolidates collective insights and learning. It aims to assist individual organisations in their decision-making and policy creation processes.

A summary version and one page overview is available on the Sport England website.

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1. Background and Rationale

Introduction

The rising cost of living is being caused by a range of simultaneous challenges including: the financial legacy of the Covid-19 pandemic; conflict in Ukraine and associated economic sanctions; global supply chain issues, interest rate rises and; inflation and wage stagnation. Sport England and some of its System Partners¹ have conducted and collated research to monitor the impacts of the rising cost of living on the sport and physical activity sector.

Sport England and its System Partners commissioned Sheffield Hallam University to bring together their collective insight and learning to create a central resource which individual organisations can draw on to support their own decision making and policy creation. The report consists of key cost of living insight documents and research reports published during March 2022 and October 2023, and which have been reviewed by Sheffield Hallam University. The overall aim has been to build an agreed narrative on the effects of increases in the cost of living on the supply of and demand for, sport and physical activity.

We have set out to underpin existing research within a framework based on applied economics and have used an objective tone and critical lens to interpret the data.

This report provides:

- A robust evidence base on the effects of the rise in the cost of living, which can continue to inform research plans and strategic decisions about how organisations respond.
- A simple story seen through multiple lenses that Sport England and System Partners can 'own' and use.
- A basis from which communications can be generated.

¹ System Partners are organisations Sport England are working with to deliver system-wide change against the 10-year strategy 'Uniting the Movement'. Examples of System Partners who have conducted and collated research into the cost-of-living increases include: London Sport, Sported, The Sport and Recreation Alliance, EMD UK and Sporting Equals.



Response

Sport England and System Partners have been tracking the impacts of cost of living increases since early 2022. They have been working collaboratively to understand the effects on sport and physical activity to inform how they respond. The response to cost of living increases is integral to *Uniting the Movement* – a 10-year strategy to transform lives and communities through sport and physical activity that also seeks to tackle inequalities in sport and physical activity.

The response to cost of living increases includes;

- The creation of a collaborative cost of living network, which enables insight, learning and research to be shared quickly and efficiently between System Partners to inform their response.
- Identifying key gaps in research about cost of living increases; commissioning research to fill them, and publishing and publicising findings.
- Working with the Department for Culture, Media & Sport to articulate the extent of the impact of cost of living increases, particularly regarding increases in operating costs related to leisure centres. The Government's Swimming Pool Support Fund (SPSF) was announced in the Chancellor's Spring Budget and is providing a total of £60 million to local authorities in England as a support package for public leisure facilities with swimming pools.
- Providing support, inspiration and information about free and low-cost activity options locally and via national campaigns such as *This Girl Can* and *We Are Undefeatable*.
- The promotion of Couch to Fitness free home workouts was funded to support people from lower socioeconomic backgrounds to continue to be active. So far, this targeted marketing has resulted in over 3,000 additional registrations, 96% of whom are people who live in IMD 1-3 areas (the most deprived areas).
- Sport England has increased the scale and visibility of existing funding that will have an impact on under-represented groups, this includes the Together Fund, Active Together (crowdfunding) and Small Grants and has provided funding to support disabled people and talented athletes from lower socioeconomic backgrounds.



- There are examples of clubs and community groups responding to support people to remain active, for example Sported focused helping members to secure funding and directly distributed £1.7m to community groups in grants on behalf of their partners. In addition, Sported's community groups have reported that to support young people to remain active half are providing free membership for their young people and just under half have their membership reduced fees.
- Organisations are supporting their memberships, for example EMD UK have introduced free membership including access to 240 resources, webinars and business support packs to support group exercise instructions; have introduced the Individual Assistant Programme for paid members, have an open bursary towards group exercise short courses and qualifications. In addition, EMD have sought to support their staff financially and have mental health champions to provide support.
- Active Partnerships are responding to support clubs, organisations and to people to remain active locally. For example, London Sport have engaged with senior officials in local government, including the Deputy Mayor for London to discuss cost of living increases in order to work together to address challenges; they ran a campaign using its Get Active Platform to promote free activities locally; they have funded projects across London (with a focus on IMD 1-3 areas) through the Together Fund and have worked in partnership with Aldi to provide food vouchers to selected schools funded through the Opening Schools Facilities Fund.
- The Sport and Recreation Alliance continues to carry out both primary and secondary research into the conditions within the grassroots community sport ecosystem; and is campaigning on behalf of its members for policy interventions to improve these conditions at the 'strategic' level. Further, in recognition of the resourcing challenges its members face, the Sport and Recreation Alliance are also hosting a series of sessions for its members to help them identify emerging funding trends, and equipping them with strategies and tactics to help mitigate the threats, and capitalise on the opportunities these trends provide.



2. Methodology

As part of this critical look at the data we have reviewed the studies that form the initial collection of evidence according to a 'hierarchy of evidence' which recognises that research varies in quality and attempts to grade outputs according to their methodological rigour. Generally, the higher up the hierarchy a methodology is ranked, the more robust it is assumed to be, although this is not absolute. For example, a well-conducted piece of qualitative research may provide more convincing evidence than a poorly conducted national survey (see Appendix 3).

The thematic analysis which follows places greater emphasis on the more rigorous research we have reviewed. These studies tend to be the regular large-scale surveys such as Sport England's Active Lives Survey (n= c. 155,000), which can confidently be generalised to population level.

The hierarchy presents a useful starting point for examining the body of evidence which has been compiled. It is important however, to point out that additional evidence will continue to emerge in the coming months. For example, the review does not contain any academic literature, since searches of major academic databases revealed that no journal articles or book chapters relating to the impact of recent increases in the cost of living on participation have yet been published. This point is easily explained by the time taken to clear the peer-review process. In time, it would be reasonable to expect a body of academic work to emerge, though this will be retrospective rather than offering any forecasts of future outcomes.

In this context, it is also important to note that some of the research reviewed here predates the significant increases in the cost of living featured in this review. For example, Gratton and Kokolakis' report to Sport England on The Effects of the Current Economic Conditions on Sport Participation relates to the economic recession which began with the recession of 2008. They noted that the recession resulted in a statistically significant negative effect on participation of -0.9% between 2008 to 2011 (Sport England, 2012).



Importantly, much of the data on which even the most robust research in the hierarchy is based, relates to perceptions of the impact of the cost of living, as opposed to measuring changes in actual behaviour. Thus, the reality of the impacts may vary from what individuals anticipate and is therefore likely to take some time to emerge. As Gratton and Kokolakis point out, there is a time lag of three financial quarters (nine months) in many official statistics, which amplifies the importance of the data generated by Sport England and its System Partners in recent months. The various surveys, evaluations and reviews are early indicators of the response of sport and physical activity consumers and industry to the effects of increases in the cost of living.

The analysis which follows reviews the content of these resources in relation to the five themes identified by Sport England and its System Partners, namely: the sport and physical activity economy; participation; clubs and community sports groups; facilities, and; the sport workforce.



3. Context

Activity Levels – Adults (aged 16+) and Children and Young People

Published in April 2023, Sport England Active Lives Adult Survey (November 2021 - November 2022) revealed that the proportion of the adult population in England meeting the Chief Medical Officer's recommendation of achieving 150 minutes of moderate intensity physical activity per week (categorised as 'active' by Sport England) had recovered to pre-pandemic levels (63%).

Beyond this headline data, the Active Lives Survey routinely identifies stubborn inequalities in levels of physical activity, which include but are not limited to:

- Men are more active than women;
- Activity levels decline with age;
- Disabled people or those with a long-term health condition are more likely to be inactive than those without;
- There are differences in activity levels associated with ethnic background. Adults from Asian (excluding Chinese), Other Ethnic Groups, Black and Chinese backgrounds are less likely to be active than people from Mixed, White Other and White British backgrounds.
- People from the most deprived areas are less active than people from the least deprived areas.



There is a move to consider combinations of characteristics of inequality in order to better understand how different characteristics impact activity levels. To illustrate, data from Active Lives Adult Report (2021-22) shows that 59.7% of people from Asian / Asian British backgrounds from higher socioeconomic backgrounds are active compared to 44.7% of people from Asian / Asian British backgrounds from lower socioeconomic backgrounds – a difference of 15%.

The results of Sport England's latest Active Lives Children and Young People Survey mirror those of the adult survey (though the data relate to the academic year 2021 – 22, and therefore predate some of the increases in inflation under discussion here). Activity levels returned to pre-pandemic levels after a lockdown-induced decline, with just under half of all children and young people (47%) meeting the Chief Medical Officers' guidelines for taking part in sport and physical activity for an average of 60 minutes or more every day, while 30% achieve less than 30 minutes per day. Crucially, the inequalities which are evident in adults' activity levels are also present in those of school age:

- Girls are less likely to be active than boys;
- Children from households on low incomes are less likely to be active than those from more affluent families;
- Black and Asian children and young people, and those from Other ethnic groups are the least likely to be active.

As with adults, combinations of characteristics of inequality are associated with activity levels of children and young people.

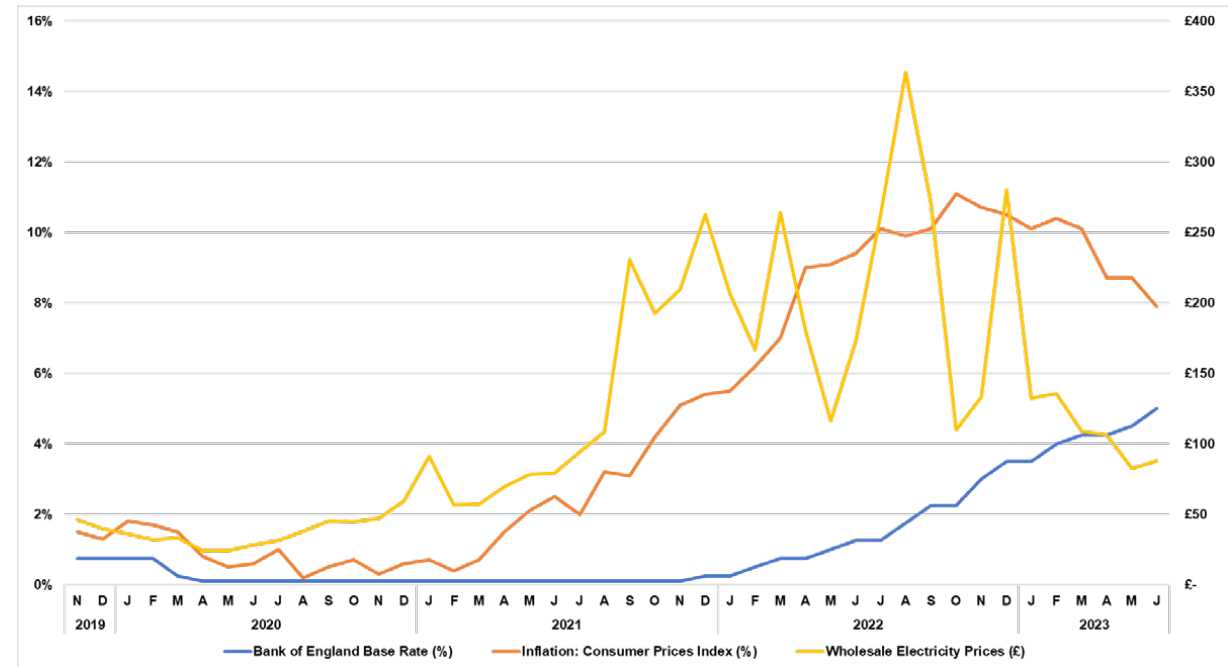
Whilst at face value the effects of Covid-19 on physical activity levels may have been reversed, the population now has a new set of different challenges to address which may impact on current and future physical activity levels. These trends are discussed in detail within the next section.



Factors Increasing the Cost of Living

Figure 1 plots trends in interest rates, inflation and energy prices as well as documenting key policy decisions and unpredictable events.

Figure 1 - November 2019 to May 2023 timeline



The three simultaneous factors of increasing interest rates, the highest level of inflation since the 1970s; and unprecedented rises in the cost of energy are outlined in turn below.



Interest rates

Between March 2009 and April 2022, the Bank of England interest rate had been less than 1%, which curtailed the cost of borrowing, particularly for homeowners. In May 2022 interest rates rose to 1% and have since increased steadily to 5.25% in September 2023. For each £100,000 of borrowing on a typical 25-year mortgage, repayments would have increased from £377 per month to £599 per month (an increase of £222, or £2,664 per year). The same basic principle applies to people who do not have mortgages but who might have other forms of borrowing such as overdrafts, loans or credit cards.

Consumer Prices Index (inflation)

The Bank of England's typical target rate for inflation is 2%. Over the period November 2019 to April 2021, UK inflation was kept within the target. In May 2021 the 2% target was exceeded and steadily increased to a peak of 11.1% in October 2022 and remained above 10% for the next six months. Consumer price inflation in the United Kingdom eased to 6.7% in August 2023, from 6.8% in the previous month. This marked the lowest rate since February 2022, primarily due to a slowdown in food inflation and a decline in the cost of accommodation services.

Energy prices

Inflation has been driven to a considerable extent by the increase in energy prices, which have two underlying causes. First, the lifting of Covid-19 restrictions in the summer of 2021 led to an increase in demand globally and an increase in energy costs as supply was unable to keep up with demand in the short term. Second, Russia's invasion of Ukraine in February 2022 and the ongoing war has caused huge and sustained increases in energy costs for businesses and households alike.

The price cap in energy bills fell by £151 from £2,074 for Q3 2023 (July – September 2023) to £1,923 in Q4 2023 (October – December 2023).



Impact on the cost of living

The cumulative effect of rising interest rates, the highest inflation since the 1970s, and exceptional energy prices result in a situation whereby the 'cost of living' has increased sharply for many people. In essence, the impact of increases in the cost of living results in people having less discretionary income after paying their fixed costs. In some cases, total costs will exceed household income. Therefore, buying power is reduced, which at household level results in a rise in the cost of living and possibly the need to make decisions on cutting back on buying goods and services.

Wage growth remains high with annual average pay growth for the private sector was 8.2% in April to June 2023; this is the largest annual growth rate seen outside of the coronavirus (COVID-19) pandemic period. Annual average regular pay growth for the public sector was 6.2% in April to June 2023; a larger annual growth rate was last seen in August to October 2001 (6.3%).

Official data underline the increasing pressure on disposable incomes, due to affordability of energy bills and housing costs. The Office for National Statistics (ONS) Opinions and Lifestyle Survey reports that 42% of adult bill payers reported it being very or somewhat difficult to afford energy bills in September 2023; this is lower than 48% in a similar period last year (31st of August – 11th September) and slightly higher than 40% in spring 2021. The survey findings provide an insight into how people are responding to cost of living increases; with around 7 in 10 (69%) said they were spending less on non-essentials, half of adults (50%) were shopping around more, 47% of adults were using less fuel such as gas or electricity in their homes, and more than 4 in 10 (46%) were spending less on food shopping essentials.)

The Opinions and Lifestyle Survey (OLS) in June – September 2023, reported that during this period of time, some groups of the population were more likely to be finding it difficult to afford their energy bills; 55% of disabled adults, 69% of people from Black backgrounds and 59% of people from Asian backgrounds; 60% of renters, and; around 50% people with a personal income of less than £20,000.



The ONS Living Costs and Food Survey provides evidence of a pandemic-related fall in disposable income of £15 per week between 2020 and 2021, while expenditure on recreation and culture fell by nearly £30 per week over the same period. This finding could indicate that when households decide how to make savings, leisure activities are among those items which take a disproportionate 'hit'. Alternatively, reduced expenditure on recreation and culture may have been a short-term effect caused by people being confined to their homes during lockdowns and recreation and culture businesses being closed.

The Opinions and Lifestyle Survey (OLS) in August – September 2023, identified that among those currently paying rent or a mortgage, around 4 in 10 (43%) reported that their rent or mortgage payments had gone up in the past six months. The proportion of adults reporting an increase in their housing costs had remained relatively stable at around 30% since Spring 2022 but rose steadily from the beginning of March 2023 to 48% in July and has reduced to 43% most recently.

Increases in housing costs are usually associated with a rise in the proportion of people who fall into arrears with rental or mortgage payments. The data from the OLS suggest that this link remains well-established, and that some groups were more likely than others to experience issues. For example, renters were more likely to report a difficulty in meeting payments (43%) than mortgage holders (28%). Similarly, disabled adults (41%), households with children (47%), adults in receipt of benefits (45%) and adults from Asian (53%) and Black (47%) backgrounds were all more likely than average to report difficulties in meeting housing costs.

Low-income households spend a higher proportion of income on housing, fuel and power, restricting expenditure on leisure in comparison with higher income households, limiting their ability to make savings to mitigate against further increases in the cost of living (Office for National Statistics, 2022). Those on low incomes have no 'slack' by which to absorb increased living costs. In addition, the rate of increase in State benefits tends to be lower than wage inflation for those in employment. This situation makes the argument that those who have less resources are likely to experience more negative impacts resulting from higher living costs at least plausible.



Sustained periods of high inflation in the UK economy are rare, a fact which explains at least some of the attention on the impacts of the cost of living. While the headline rate has fallen slightly since the peak of 11.1% in October 2022, both the Bank of England and the Office for Budget Responsibility predict a sharp fall in inflation by the end of 2023, returning to the target level of 2% by the end of 2024.

This does not mean that prices will fall, however and the gap between household income and outgoings will not close until wages increase sufficiently to close the gap, based on forecasts living standards are projected to return to 2021/22 levels by 2027/28 which will be below pre-pandemic levels in real terms.



4. Findings by Theme

Sport Economy

Key Points

- The impact of increases in the cost of living appears to be 'priced in' to participant behaviour, meaning that some people are making permanent adjustments to their participation behaviour to reflect their level of disposable income.
- Incomes have fallen for many households in real terms, imposing limits on participation in sport and physical activity caused by factors including increased costs and less time.
- These effects are more pronounced in lower income households, which spend a higher proportion of their incomes on housing and energy costs.
- Providers are feeling the effects of energy price increases, and in some cases have reduced operating surpluses.
- The impact of gas and electricity price growth is amplified in facilities which are more energy intensive, such as swimming pools and leisure facilities.



Sport England’s Activity Check In data give some indication of how sharp and sustained increases in the cost of living play out in the sport economy. Half of all adults responding to the survey in November 2022 reported having less disposable income than a year ago, rising to 63% in February 2023 and just under one in five (19%) reported spending less on physical activity and exercise.

In August 2023, 35% of all adults reported that the cost of living increases were having a negative impact on their ability to be active (12% said it was having a significant negative impact and 24% said it was having somewhat of a negative impact), 55% of people said it was having little or no impact and 9% said it was having some positive impact.

Figure 2 – Impact of increases in the cost of living on ability to be active (Sport England 2022-23)

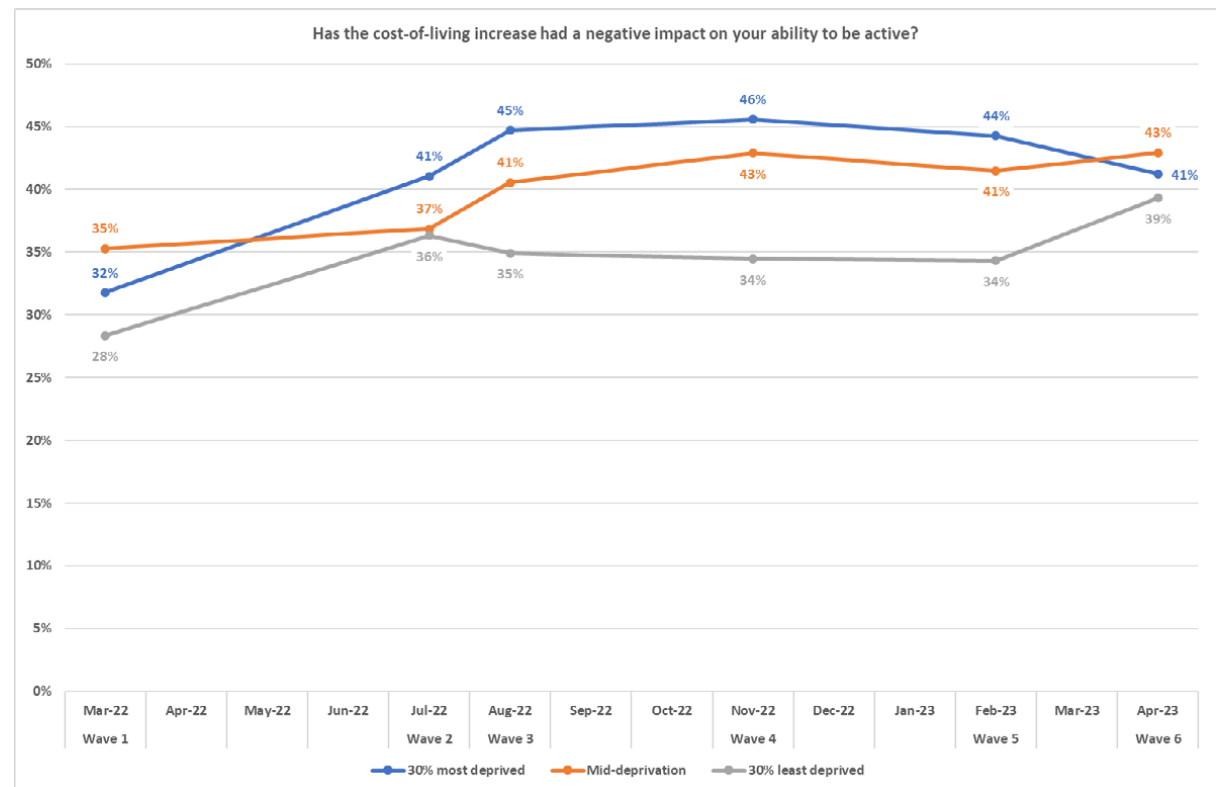




Figure 2 indicates that until recently, the impacts of cost-of-living increases have been more pronounced among disadvantaged groups (specifically, people living in the 30% most deprived neighbourhoods in England).

A higher proportion of those in the most deprived neighbourhoods reported a negative impact on their ability to engage with sport and physical activity than those in less deprived areas between Wave 2 (August 2022) and Wave 8 (August 2023). As day to day living costs rise and disposable income falls, it is those with the most marginal balance between income and expenditure who will be the first to make choices about saving money by reducing discretionary spending. Indirect costs such as transport are also a factor, with some evidence from the Activity Check-In Survey to suggest participants are using their cars less to access sport and physical activity opportunities.

Figure 2 is good evidence to support the point that those with the least financially are more likely to be negatively impacted by increases in the cost of living, which in turn is likely to amplify existing inequalities.

Figure 2 also shows that while the perceived negative impact peaked in Wave 4 (November 2022) at 46% for people in the 30% most deprived neighbourhoods it has remained above 41% between July 2022 and August 2023. Between Wave 1 (March 2022) and Wave 3 (August 2022) of the Activity Check-In survey, there was a significant shift in sentiment which was especially marked between July and August (Sport England, 2022-23). This point coincided with announcements in relation to the Energy Price Cap (superseded in October 2022 by the Energy Price Guarantee) which restored an element of predictability to energy prices. Furthermore, sentiment among those in the least deprived 30% of neighbourhoods shifted in the most recent wave of survey data with 39% (April 2023), reducing to 36% most recently in August 2023.

Our interpretation is that the wide coverage and debate around the increased cost of gas and electricity may have caused consumers in more deprived neighbourhoods to have 'priced in' the impact of these rises to their thinking before they occurred. The subsequent Government intervention helped to stabilise the market and protect people from the worst excesses of the increased costs. This intervention in turn may have led to the levelling off in perceptions that higher costs would impact negatively on participation in physical activity.



A recurrent theme is that the most deprived people feel the changes more acutely than their less deprived peers. In Wave 1 (March 2022) the difference between the least and most deprived was 4 percentage points whereas in Waves 2-5 (July 2022 – February 2023) it ranged from 5 to 12 percentage points. In Wave 6 (April 2023), the gap between the most and least deprived neighbourhoods closed to just 2 percentage points and widened in Wave 7 (June 2023) to 8 percentage points and most recently in Wave 8 (August 2023) it was 7 percentage points.

In Wave 5 (February 2023) of the Activity Check In survey, 63% of respondents said that their disposable income had fallen over the preceding 12 months, 39% said they were struggling to afford essential items (14% struggling a lot and 26% struggling a little) and 61% of people said they were not struggling. These figures were significantly higher among disabled people or people with long-term health conditions and those from the most deprived places (52% of disabled people and / or people with long-term health conditions and 47% of people from the 30% most deprived places).

Data produced by System Partners appears to confirm the patterns established by both ONS and Sport England data in relation to responses to increases in the cost of living by both households and the organisations which provide them with opportunities to engage with sport and physical activity. Prior to the pandemic, StreetGames found that among the most deprived 20% of households, spending on leisure as a proportion of average household expenditure increased from 34.9% of the national average to 38.2% between 2016 and 2019 (StreetGames, 2022), equating to an additional £350 per year and resulting in participation growth to that point in time.

New Philanthropy Capital's local needs databank found that households in the lowest decile of disposable income spend more of their income on essentials compared with those in the middle and higher deciles. Further, low-income households spend a larger proportion of their income on items for which prices are rising the fastest and that they have limited scope for cutting back on discretionary spending (New Philanthropy Capital, 2022). The Bevan Foundation's (2022) survey of adults in Wales identified a reduction in disposable income, with rising arrears and household debt, while the Children's Society report that 85% of parents are concerned about their household finances over the



next 12 months, and that 27% of parents have struggled to find the money to pay for PE and sports kit over the last year (The Children's Society, 2022).

London Sport (2023) identified the key factors in consumer decision making as housing costs and low incomes. Increases in the cost of housing (particularly rented housing) and a squeeze on disposable incomes have combined to undermine the purchasing power of Londoners in relation to sport and physical activity. There is a lower likelihood that people on low incomes have savings to cushion them from the impact of the rise in the cost of living. Housing costs have risen particularly sharply in London relative to the rest of the country. Half of all adults in London have reduced their spending, including sport and leisure-related expenditure (London Sport, 2023).

There is some evidence of changes in behaviour in spectator sports, with 56% of football fans expecting to reduce matchday spending on food, drink, programmes, raffle tickets and other donations (FSA, 2022). The same survey found some support for mitigation measures from 75% of supporters such as daylight kick-offs for midweek matches, but a minority of fans (13%) said that they would attend fewer games as a result. Some semi-professional leagues were reported to be in discussions to experiment with such a move², though in practice there has been little if any change to the traditional scheduling pattern of fixtures.

There is evidence that rising energy costs are affecting the financial reserves of paid and voluntary organisations. Research from the Sport and Recreation Alliance in July 2022 outlined that one in four clubs were in a financial 'red zone' (holding reserves below a third of turnover). Prior to the pandemic, when a small operating surplus was the norm among voluntary sports clubs the situation would have been less challenging (Sport and Recreation Alliance, July 2022). An impact of COVID-19 on voluntary clubs surveyed in the Sport and Recreation Alliance research is a depletion of their financial reserves.

Voluntary sports clubs are therefore vulnerable to shocks in the economy in the absence of opportunities to generate more income or access external support. Drivers of cost increases include energy price inflation, while inflation in the wider economy has a negative impact on the affordability of

2 Isthmian League offers early kick-offs to clubs to mitigate increased energy costs, published 3rd August, 2022, <https://www.bbc.co.uk/sport/football/62405670>



membership fees and subscriptions, affecting income generation (Sport and Recreation Alliance, July 2022), in addition 41% of organisations responding the Sported's Pulse Survey (September 2022) said that they have seen external funding streams reduce because of cost of living pressures.

These findings are echoed by the Children in Need survey of 776 charities and projects across the UK which found that 91% would struggle to pay an increased bill, threatening the delivery of support to children and young people (Children in Need, 2022). In 2022, Sported reported that groups delivering participation opportunities had responded to the impact of inflation by changing their operational model, with 47% now providing free membership for young people, while 36% have reduced fees (Sported, 2022). By early 2023, these figures had risen further, with just over half of all groups (51%) eliminating fees altogether (Sported, 2023).

Owned or leased facilities report significant concerns regarding utility costs, and those who rent facilities see this passed on through increased hire costs. Figures from Sported's Community Pulse survey in September 2022 indicated that there was a time lag for renters, whereas owners and lease holders were already reporting cost increases in the last 6 months. Subsequent reporting confirmed the scale of the utility price increases, with just under half of all providers (49%) recording a significant rise in energy costs over the previous 6 months (Sported, May 2023).

The main increases in running costs work their way down the supply chain to reach the consumer. ukactive's Energy Risk Survey in June 2022 asked fitness and leisure operators about the impact of high energy costs, which affected both their customers and their operations directly – with some facilities reporting that energy bills had risen by up to 200% compared to before the energy crisis. It noted that all public sector operators who responded were reporting they would be likely or extremely likely to increase customer pricing within the next 12 months as a result of the pressures. (ukactive, 2022a). A follow-up survey in February 2023 reported that 87% of private sector operators who responded had raised prices in the intervening period, and 93% expected to raise prices again in 2023 (ukactive, 2023).



Participation

Key Points

- At headline levels, the percentage of adults and children and young people who are meeting the Chief Medical Officers' guidelines and are 'active' have returned to pre-pandemic levels - indicating a level of resilience in activity levels.
- Beneath the headline rate, inequalities between socio-economic and demographic groups exists.
- Whilst the percentage of children and young people who are less active and adults who are inactive are lower than 12 months ago, they remain slightly higher than pre-pandemic levels. The percentage of people who are less active and inactive are likely to be associated, to some extent, with the pace of recovery following pandemic restrictions, as well as people making changes to their sport and physical activity behaviours due to cost of living increases.
- Just over two-thirds of people have made changes to their sport and physical activity behaviours because of cost of living increases, these changes, in the short-term at least are best described as having positive, neutral and negative affects on activity levels.
- Whilst changes which are categorised as negative are likely to be negatively affecting activity levels for some, the positive and neutral changes people are making to their sport and physical activity behaviours are likely contributing towards a level of resilience in the percentage of people who are active.
- Looking ahead, ongoing monitoring of future research including Active Lives and Activity Check-In is recommended to further understand the effects of cost of living increases on people's sport and physical activity attitudes and behaviours.



Adults (16+)

In the most recent iteration of Sport England's Active Lives Adult Survey Report (November 2021 – November 2022), 63.1% of adults met the Chief Medical Officer's guidance for physical activity of at least 150 minutes per week (Sport England 2023), which represents a return to pre-pandemic levels.

The proportion of inactive adults remains slightly up on pre-pandemic levels (+1.2%), however this figure has reduced by -1.4% compared to 12 months ago which is a positive signal. The Active Lives Adult Survey covers the period between November 2021 and November 2022 and as such, coincides with a period of cost of living increases which began in late 2021.

The Active Lives Adult survey 2021-2022 highlights persistent inequalities in activity levels overtime, with activity levels between the most and least affluent, and women, disabled people and / or people with a long-term health condition, people from Asian (excluding Chinese), Other Ethnic Groups, Black and Chinese backgrounds being less likely to be active than other groups.

Overall, the most recent Active Lives adult survey (2021-22) outlines that activity levels have recovered following a period of falls resulting from the restrictions applied to everyday life during the coronavirus (COVID-19) pandemic restrictions. The proportion of active adults is back in line with levels seen pre-pandemic (November 2018-19) and above those from baseline, six years ago (2015-16). This points to a story of recovery in the percentage of people who are active.

In the same report levels of inactivity are higher than before the pandemic (+1.2% in November 2021-22 compared to November 2018-19), however it should be noted that levels of inactivity have decreased compared to the levels seen during pandemic restrictions. There is likely an association between levels of inactivity and existing inequalities, as people with certain characteristics are more likely to be inactive (for example, people from lower socioeconomic backgrounds and disabled people and / or adults with a long-term health condition), cost of living increases may be contributing towards levels of inactivity being higher than before the Covid-19 pandemic restrictions.



Figure 3 - Participation by IMD Decile at Sports Halls and Swimming Pools, 2021-23

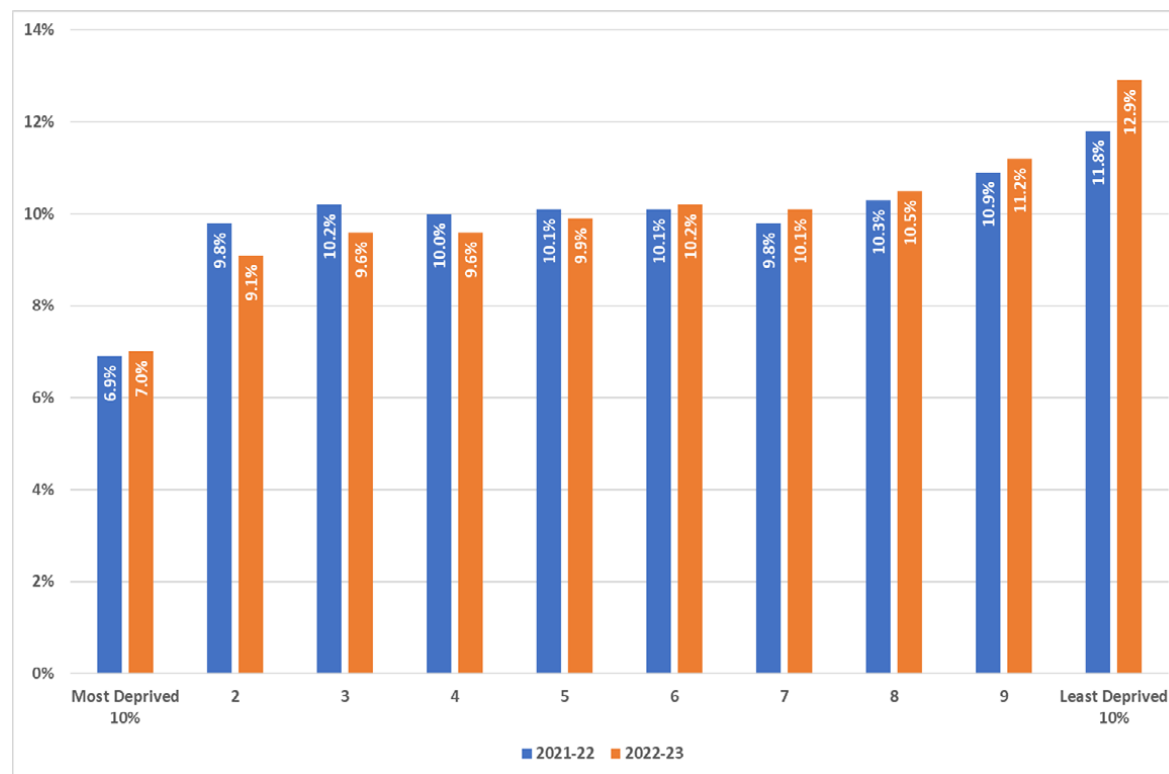


Figure 3 shows Moving Communities data relating to participation at sports halls and swimming pools, and highlights that while there was almost no change in the number of facility users from the most deprived 10% of neighbourhoods, they remain notably under-represented as a group. Moreover, the proportion of users from the next three most deprived deciles fell, while those from the least deprived 10% of neighbourhoods increased by just over 1 percentage point over the same period. The gap in activity levels between the most and least deprived neighbourhoods therefore appears to have grown, according to these data, as the cost of living has increased – reinforcing the inequalities between the most and least deprived areas as reported in Sport England’s Active Lives Adult Report (November 2021 – 22).



Levels of inactivity may, in part, be associated with a return in activity levels following pandemic restrictions as well as cost of living increases as a higher proportion of people with characteristics of inequality are more likely to be inactive compared to those with no characteristics of inequality, and these are groups who may be affected to a greater extent by cost of living increases.

The next Active Lives Adult Survey Report (due to be released in April 2024) will be of interest to understand the extent to which sport and physical activity behaviour such as levels of activity and inactivity changed between November 2022 and 2023, a time period which coincided with a longer period of cost of living increases.

Activity Check-In data between March 2022 and August 2023 monitored what impact, if any, the cost of living has had on people's ability to be active. In March 2022 (Wave 1) 35% of people said the cost of living had a negative impact on their ability to be active (10% said it was having a significant negative impact and 24% said it was having some of a negative impact).

Between waves 2 – 7 (July 2022 and June 2023) there was little change in the percentage of people who agreed it was having a negative impact (between 38% and 42%), little or no impact (between 48% and 51%) and a positive impact (between 9% and 11%).

In August 2023 the percentage of people who said the cost of living was having a negative impact on their ability to be active reduced slightly compared to waves 2 – 7 to 36%. This was caused by a reduction of the percentage of people who said it was having 'some' negative impact on their ability to be active (24%). In addition, the percentage of people who said the cost of living was having little or no impact increased slightly compared to waves 2 – 7 (55%).

Further waves of Activity Check-In data will be required to establish whether the changes in wave 8 (August 2023) are a one off, or if it signals changes in the impact of the cost of living on people's ability to be active.

Just over two thirds of adults (71%) have made changes to their sport and physical activity behaviours because of cost of living increases (wave 8, August 2023). The data indicates that people from the most-deprived locations (79%), people with disabilities and / or health conditions (83%), those aged 16 – 34 (90%), 35 – 54 (77%) and women (74%) and are the groups most likely to be making changes.



People who are making changes to their sport and physical activity behaviours because of cost of living increases report a variety of factors as contributing towards the changes they are making; 36% of people say they can't afford to be active, 29% say they have less time to be active, 28% say they have too much on their mind to plan to be active, 23% say they have fewer people to go with, 19% say opportunities in their local area have decreased and 13% say because of negative changes to the activity experience (wave 8, August 2023).

The changes people are making to their sport and physical activity behaviours because of cost of living increases can, in the short-term at least be described as having positive, neutral and negative impacts on people's activity levels i.e. those who are making predominantly negative changes may reduce their activity levels, whilst the positive and neutral changes people are making may be supporting the percentage of people who are active returning to pre-pandemic levels.

In August 2023 (wave 8) 20% of people were walking or cycling to places rather than using the car (a positive change), 18% started or increased free activities (a neutral change), 12% started or increased activities at home (a neutral change), 10% stopped doing pay as you go activities (a negative change), 8% cancelled their gym memberships (a negative change) and 6% cancelled memberships to specific sports or activities (a negative change) and 6% switched to lower cost or more flexible gym memberships (a neutral change).

Data from System Partners show similar trends. For example, ukactive reported consumer engagement polling in November 2022 which found that 43% of respondents thought the rising cost of living would have a negative impact on their ability to participate in sport and exercise (ukactive, 2022b). Similarly, London Sport found in March 2023 that over a third (38%) of Londoners reported the rising cost of living had either a significant or somewhat negative impact (12% significant negative impact and 26% somewhat negative impact) on their ability to be active, 49% reported no impact at all and 9% reported a positive impact (6% some positive impact and 3% significant positive impact). Disabled people and those with long-term health conditions (48%) and adults aged 18 – 34 (50%) and 35 – 54 (40%) were amongst the groups most likely to say they had been negatively impacted.



In response, 22% of Londoners increased free activities, 21% increased the amount of walking and cycling they did, 13% stopped doing pay as you go activities, 13% cancelled gym memberships, 13% cancelled sport and activity specific memberships and 8% switched to a lower cost / more flexible gym membership (London Sport, March 2023). The switch from paid activities to non-paid activities, is a good example of people finding a way to preserve their resilient physical activity habit.

In August 2023 (wave 8) when people were asked about how they felt about the changes they were making in response to cost of living increases people are reported both positive and negative feelings; 31% of people said they were motivated to continue an active lifestyle, 27% said they appreciated the time they spend being active more and 22% said they felt happy that they had found new activities (examples of positive feelings) whilst 20% said they felt sad they can no longer do activities they enjoy, 20% said they felt sad that they had to make choices about activities and 13% said they felt deconditioned (examples of negative feelings).

From the perspective of the types of activities adults are participating in, Active Lives Adult Report (November 2021 – 22) provides evidence of some activity switching during the pandemic, with participation in running and cycling peaking in 2019-20 (during a period of Pandemic restrictions). Whilst cycling for leisure and sport remains up on pre-pandemic levels (by just over 300,000), running has reduced, continuing the prior trend (down by nearly 1m since November 2015-16).

Swimming shows signs of recovery, levels remain below pre-pandemic levels and there is a continuation of the downward trend. In contrast, team sports have recovered to pre-pandemic levels with indications of a stabilisation at around 3.1m players. Despite seeing some growth previously, fitness activities and active travel both saw large drops in numbers during the pandemic that are yet to be fully recovered. As a result, both see fewer people taking part – with fitness down by more than 650,000 people (compared to November 2016-17) and active travel down by more than 800,000 people (compared to November 2015-16).



Walking for leisure was growing steadily before the pandemic and saw accelerated growth during it - with walking often becoming the activity of choice when others were less readily available. There has been a dip in walking for leisure compared to 12 months ago, this isn't unexpected given other activities have seen their numbers recover and there is a continued strong upward trend with more than 2.6m more walkers compared to before the pandemic (November 2018-10) and 4.6m compared to six years ago (November 2015-16).

Children and Young People - Years 1 - 11 (aged 5 - 16)

Active Lives Children and Young People Survey (academic year 2021-22) represents a period without COVID-19 restrictions, however individual and class-level disruption though self-report shows a return to pre-pandemic activity levels with 47.2% of children and young people being active which is back in line with pre-pandemic levels (2018-19), following increases compared to 12 months ago. The proportion who are active has increased by 2.6% meaning there are 219,000 more active children and young people compared to 12 months earlier, while the proportion who are less active has decreased by 2.3%, or 143,000 fewer less active children and young people, however the proportion of children and young people who are inactive is higher (+1.1%) than pre-pandemic levels (2018/19).

A similar story of inequality comes through the Active Lives Children and Young People Survey as it does in the Active Lives Adult Survey; with girls, children from low affluence families, children with disabilities and long-term health conditions and children from Asian backgrounds, Black backgrounds and children from Other ethnicities having lower levels of activity compared to other groups.

Through the lens of age bands the picture is mixed, the proportion of children and young people classified as active has returned to pre-pandemic levels across most aged groups, however activity levels for children in years 3-4 (ages 7-9) are 4.5%, or 53,000 children down on pre-pandemic levels (academic year 2018-19), with no change in activity levels compared to 12 months ago.

In contrast, activity levels have increased above pre-pandemic levels (up 5.7% / 145,000 young people) for young people in school years 9-11 (ages 13 - 16) and these figures are in line with the highs seen two years ago.



In February 2023 (wave 5) Activity Check-In asked parents and carers of children what changes they had made to their child(ren)'s sport and physical activities due to increases in the cost of living. The responses in terms of the types of changes being made were similar to those reported by adults (aged 16+), in the respect that the changes can be described as having positive, neutral and negative impacts on people's activity levels.

For example, 19% of parents / carers said they were using free activities for their child(ren) to socialise with friends instead of paid (a neutral change), 15% were walking or cycling to get to places with their child(ren) rather than using the car (a positive change), 12% said they had reduced the regularity of paid (pay as you go activities) their child(ren) does (a negative change), 10% have started / increased the number of free activities their child(ren) does and 7% have cancelled their child(ren)'s membership to specific sports activities.

Increases in active travel and gym and fitness, seen during the pandemic have been largely retained. The proportion of children and young people walking, cycling or scootering to get places (active travel) increased across the academic year 2019 -20, despite school settings being closed at times and these increases have been maintained over the last 12 months.

During the pandemic there was a large increase in gym and fitness activity driven by younger children (years 1-6, ages 5-11). This age group has seen levels fall back, although they do remain substantial and above pre-pandemic levels. In contrast, older children (years 7-11, ages 11 - 16) are following a steady upward trend in those doing gym and fitness.

Some activities were more notably hit during the pandemic than others, and while there are clear signs of recovery, some are not yet seeing the proportion of children and young people taking part return fully to pre-pandemic levels. For example, team sports participation remains 3.3% below pre-pandemic levels, the proportion taking part in gymnastics, trampolining or cheerleading remains 3.9% below pre-pandemic levels and swimming levels, while seeing a significant increase compared to 12 months ago due to the scale of the drops during the pandemic, remain 5.6% below pre-pandemic levels.



In summary from a participation perspective covering children, young people and adults it is likely that changes in participation in specific activities are due, in part, to the lifting of pandemic restrictions i.e., a return to activities which were restricted during COVID-19 restrictions, and the reported changes people are making as a result of cost of living increases, as detailed in Activity Check-In.

Another key take-away from this insight is that people are making changes which are likely to be positive, negative and neutral in terms of their impact on activity levels. Negative changes, such as cancelling gym or sports memberships may have a negative impact on activity levels and might be contributing to inequalities, and the overall percentage of people who are inactive being slightly higher than pre-pandemic levels. On the other hand, neutral and positive changes such as increasing the amount of walking or cycling a person does to get places or increasing at home activity may be contributing to a level of resilience in the percentage of people who are active.

The next Active Lives Children and Young People Survey (academic year 2022 -2023) will be published in December 2023 and the next Active Lives Adult Report (2022-23) will be published in April 2024. These reports are important as they cover another period of time which coincides with cost of living increases. They will provide the opportunity to compare against key insights from the most recent Active Live Reports (presented in this report), and will enable further exploration of the effects of increases in the cost of living on people's sport and physical activity attitudes and behaviours to deepen understanding and use this information to respond.



Clubs and Community Sport Groups

Key Points

- Some participants appear to be cancelling memberships and subscriptions, it is likely that people from lower socioeconomic backgrounds are more likely to be affected.
- There is a high level of concern from voluntary clubs about the impact of cost of living increases on their groups and the communities they serve.
- A key concern of voluntary clubs is the loss of access to facilities. The extent to which facility providers pass on their increased costs to their users will be crucial in this respect.
- There is evidence that some voluntary clubs are responding to cost of living increases and have made changes to their operations to support young people to remain active.



Following the recession in 2008, many clubs that formerly had waiting lists for new players reported no longer had such lists, indicating a drop off in demand (Sport England, 2012). Sport England has recognised in its reporting of successive waves of the Activity Check In survey, that “individuals being unable to take part reduces opportunities for other members of clubs i.e., not having enough people to take part with, broadening the impact of increases in the cost of living” (Sport England, 2022).

It is therefore a concern that some people are making changes which may be negative for the sport and physical activity sector providers such as cancelling / reducing memberships or switching to lower cost / more flexible gym memberships, suggesting that some people are spending less on sport and physical activity as a result of cost of living increases.

These findings are supported by figures from London Sport’s research into the impact of the cost of living on sport and physical activity in the capital, where 13% of residents have cancelled an existing sport or activity-specific club membership, compared with 7% across the rest of the UK (London Sport, 2023).

Formal participation in voluntary clubs all but ceased during the pandemic and was forecast to recover to 90% of pre-Covid levels once lockdown restrictions were eased in the summer of 2021 (SRA 2021, SRA 2022). Participation opportunities (as measured by the number of minutes offered per club per week) have fallen by 16% (SRA, 2022). The reductions are particularly marked in sports which are facility-dependent compared with those which are more ‘footloose’ (SRA, 2022).

Recovery continues after COVID-19 however there are differences in the capacity levels reported by different organisations, the overarching insight suggests that membership levels of organised activities (sports clubs and community groups) are lower than pre-pandemic levels. It is recommended that club membership levels continue to be monitored as the changes could signal a change in the types of activities people are participating in.



For example, Sport England's Active Lives Adult Survey reported that the percentage of people who were club members reduced by -2.2% to 40.2% in November 2021 – 22 compared to the last pre-pandemic data point November 2017-18 (42.4%) suggesting that there has been a small reduction in the percentage of people who are club members since the pandemic.

Sported's survey of community sport groups found that 74% of organisations are operating below capacity, with 56% saying participation is lower than before the pandemic (Sported, 2022). Separately, the Local Government Association (LGA) reported that operators saw a recovery to 70% of pre-Covid levels by the early part of 2022 (LGA, 2022). Elsewhere, Community Leisure UK reported that participation in facilities was at 80-90% of pre-Covid levels, though this figure was as low as 50% in some trusts. (Community Leisure UK, 2022). Similarly, EMD UK (2023) reported that 49% of instructors have seen participant numbers decline over the past 12 months, while 28% have seen an increase, suggesting that there has been a net reduction in participants in group exercise classes.

There is evidence from the SRA's 2021 survey of voluntary clubs to suggest that looking forward 29% express concern that members would be lost to other physical activity opportunities or indeed new non-sporting hobbies developed during the pandemic.

Of the voluntary clubs who responded to the SRA survey (2022), 44% said that they had reduced activity as a result of cost of living increases and 71% said that they expected their members to continue to pay their fees (SRA, 2022). Such an outcome related to fees would have a much higher impact on members with low incomes, and data from the most recent waves of Sport England's Activity Check-In surveys suggest that they are likely to switch to lower cost, informal activities in response, particularly where indirect costs such as transport present an additional barrier to participation. Streetgames (2022) report that subscriptions to leisure services in the 20% most deprived neighbourhoods were already well below less deprived households at 57% of the national average, and the gap is expected to widen further if left unchecked.



A key concern for most voluntary clubs is the loss of access to the facilities on which they depend. Just over three quarters of clubs in the SRA survey (77%) identified availability of leisure centre facilities as a potential limiting factor on their activity, and more than half (53%) cited affordability of facilities.

In most cases this point refers to publicly owned and managed facilities, i.e., those run by, or on behalf of, local authorities. The Local Government Association (2022) agree that “clubs which are dependent on publicly owned facilities are vulnerable in the event of closure”. It is therefore logical to examine the effects of increases in the cost of living on the provision of facilities for sport and physical activity.

The Sported Community Pulse Survey (May 2023) highlighted that 54% of groups were extremely concerned and 40% were fairly concerned about the impact of cost of living increases on their group.

The top three most cited challenges groups reported that young people were facing were concerns around economic hardship (49%), poverty / inequality (31%) and mental health (29%) (Sported Community Pulse Survey, May 2023). In response, to support young people to remain active during a period of cost of living increases, 79% of groups reported making a change to their operation, a slight increase from their pulse survey in September 2022 (72%). The most frequent changes were to provide free membership for their young people (51%), reduce fees (45%) and providing free meals or food (35%).



Facilities

Key Points

- There is evidence that people are making changes to their memberships which is affecting paid for activities.
- Deliverers' concerns over loss of facility access appear to be borne out by data relating to availability.
- Utility costs are the most significant concern for facility operators.
- Financial pressures may result in temporary or permanent facility closures of both public and private sector facilities if funding shortfalls continue.
- Older, less energy-efficient facilities are especially vulnerable to closure, which may have implications for provision in communities with lower incomes and rural areas.



Sport England's Cost of Living Insight Report (2023), citing Sported (2022) suggests that both public and private facility providers are reducing the number of sessions offered and increasing fees. It should be noted that these constraints on services coincided with a period of re-opening following the easing of COVID-19 pandemic restrictions. These measures reduced fixed costs and compensated for lost income respectively. The recession of 2008 resulted in negative impacts on indoor activities, and those with inherently higher facility costs such as swimming and ice sports. These impacts are likely to be repeated in response to the rising cost of living and the rising cost of running a business (Sport England, 2012).

The nature of sport and leisure facilities is that virtually all costs are fixed relative to opening hours. Therefore, if fixed costs increase the logical responses are to reduce opening hours to save on staff costs or to raise prices. For energy intensive activities such as swimming, pools have to be heated whether a facility is open or closed and it is therefore no surprise that facilities with swimming pools are finding operating conditions particularly tough. Local authorities across England have reported budgetary pressures caused by rising energy costs, which have in some cases resulted in temporary closures³, or the prospect of facilities closing in the current financial year⁴. This is also true for private sector operators who are also facing the same pressures (ukactive, 2023).

On the demand side, consumer responses to increased facility costs and pressure on disposable incomes have been pragmatic and predictable. The Activity Check In surveys reveal that by August 2023, 8% of respondents had cancelled their gym memberships and 6% had cancelled memberships to specific sports (Sport England, 2023).

London Sport found that 13% of the capital's residents have cancelled their gym membership, compared with 7% across the rest of the UK. (London Sport, 2023). Whilst there aren't significant differences between the percentage of people from low, mid and high affluence backgrounds who are cancelling their gym memberships, the implication of each of these data points is that membership cancellations are more likely among those on low incomes as they are less likely to take part in a variety of activities and as such if they stop doing one activity it is likely to have a greater impact on their overall activity levels i.e. they are less likely to replace one activity with another.



Data from the Moving Communities data hub shows that, the number of participants from low socio-economic groups falling by almost 84,000 between March 2022 and March 2023 (Moving Communities Data Hub, 2023), despite overall throughput increasing by around 500,000 people. This apparent paradox may be explained, at least in part, by users from higher income households using lower cost facilities on a pay-to-play rather than a subscription basis.

From the perspective of providers, the picture is a challenging one. A survey of organisations by the Chartered Institute for the Management of Sport and Physical Activity (CIMSPA) with the Swimming Teachers Association (STA) found that 82% of all respondents report that the high cost of energy has had a negative impact on their business. More than half (54%) say that their organisation will be forced to raise prices or close without continued government support (CIMSPA, STA 2023). Data from ukactive's Energy Risk Survey appear to confirm this, with 31% of council areas in England thought to be at risk of losing public sector facilities or seeing reduced services at their leisure centre from April 2023 onwards, with an additional 50% of private sector operators also reducing their services or operations (ukactive, 2023) Around 350 public sector facilities nationally have seen service restrictions, temporary or permanent closures between October 2022 and February 2023 (ukactive, 2023).

Community Leisure UK report that 75% of charitable trusts are at risk, ranging from those who are in crisis now to those who foresee a crisis point on the horizon due to reduced disposable income caused by increases in the cost of living. Just over a third (38%) predicted that they would post an operating deficit in the financial year ending 2023 (Community Leisure UK, 2022). Sported's (2022) survey of 543 activity providers reveals significant concerns regarding utility costs, especially among those who lease or own facilities. Most operators reported increases in facility costs of up to 50% in the six months preceding the survey, and most expected further increases in costs in the next six months. To date, and affirming the approach of voluntary clubs, the response of many has been to attempt to secure alternative sources of funding. A consistently high percentage of groups identified this approach to dealing with a funding gap as their top priority.

A subsequent survey by the same organisation (Sported, 2023) confirmed that many groups have experienced significant rises in energy (49% of providers) and



utility bills (48%), in line with earlier findings. Future cost pressures are expected from increases in public liability insurance (forecast by 43% of groups) and continued high prices for energy and utilities. Interestingly, only 30% of groups expect to see further significant utility price increases, appearing to confirm that providers have adjusted permanently to a higher level of energy costs. This situation will be difficult to sustain in the longer term, as demonstrated by nearly half of providers contemplating price rises to cover costs.

The concerns of sessional providers reflect those of facility operators, 18% of whom fear that their facility will be forced to close by high energy prices (CIMSPA, STA 2023). Moving Communities (2023) data appears to confirm that these concerns are real, indicating that the proportion of total expenditure allocated to utilities rose by 3.5 percentage points between March 2022 and March 2023. Energy bills are as significant a pressure point for facility providers as they are for individual participants and for clubs. At the strategic level, 21% of trusts are planning to close some or all facilities in response to the impact of increases in utility costs (Community Leisure UK, 2022). Similarly, 21% of private sector operators predicted that they were likely to have to close some or all of their sites in the next six to 12 months (ukactive, 2023). The Local Government Association reports that some facilities closed, either permanently or temporarily over the winter (LGA, 2022). In London, reduced income from admission fees is putting local authority facilities at risk of closure (London Sport, 2022).

Leisure providers are disproportionately affected by increases in gas and electricity costs, because of the high demand for energy in facilities, especially those with swimming pools. Facility providers used £125 million in reserve funds as well as £100m through the National Leisure Recovery Fund to sustain themselves through the pandemic, leaving little if any cash available to absorb increases in the price of energy.

The Job Retention Scheme provided support during the pandemic, but when both schemes ended there was a significant shortfall in income at facilities, which appears to be continuing according to Moving Communities data. The costs of paying the national living wage are also adding to inflationary pressures, with each leisure service expecting to see increases of between £1 million and £1.5 million (Local Government Association, 2022). Scaled up across around 300 leisure service providers at national level equates to a figure of nearly £0.5 billion.³⁷



In 2023 the Government announced the Swimming Pool Support Fund (SPSF) which will provide a total of £60m to local authorities in England as a support package for public leisure facilities with swimming pools. The objectives of phase one are to:

- Minimise the closure of swimming pool provision within local authority areas;
- Prevent gaps in public leisure provision emerging;
- Prioritise support in those areas of greatest socio-economic need (as evidenced by deprivation), where all other factors are equal; and
- Encourage the leisure sector to transition to a position of environmental and financial sustainability through local strategic plans for leisure and active wellbeing.

Availability of facilities was the most significant constraint on the operation of sports clubs as increases in the cost of living began to take hold (SRA, 2021). These concerns are real, with 12% of the groups surveyed by Sported saying that their operations were affected by issues related to changes in their access to facilities (Sported, 2022). Similarly, EMD UK (2023) found that 58% of instructors reported increased facility costs over the past year, and that one in four had stopped working for an operator during the same period. Schools are also heavily dependent on publicly funded facilities to deliver swimming as part of the National Curriculum and are therefore vulnerable to reductions in access (LGA, 2022). The SRA also found some evidence of reduced availability, higher costs and increased competition from other clubs and sports for the same space (SRA, 2022).

Availability concerns notwithstanding, facility-owning clubs generate over three times the amount of participation opportunities than other types of organisations, demonstrating their strategic importance to the sector (SRA, 2022). Looking ahead, the LGA forecasts that increased costs will inform decisions being made about opening hours, concessionary rates, and programming. For the remainder of the sector, there is an immediate threat to facilities. These tend to be older, energy-inefficient facilities in areas of the community with lower disposable incomes and by implication, lower demand. Rural facilities with limited public transport access are also likely to fall disproportionately into this category. Over 66% of public sports halls and swimming pools are said to be in need of replacement or refurbishment (LGA, 2022).



Workforce

Key Points

- Workforce capacity has returned post-Covid, especially among coaches, but some members of the workforce have been quicker to re-engage than others.
- The size of the volunteer workforce has declined overall, putting those who remain under increasing pressure to deliver the same amount of capacity.
- The inequalities in representation between volunteers from different socioeconomic and demographic groups persist, mirroring inequalities in participation.
- The paid workforce is finding employment opportunities increasingly hard to come by and terms and conditions appear to be deteriorating.
- There are long-term challenges to the retention of both the paid and unpaid (volunteer) workforce.

Evidence from the Active Lives Survey suggests that the adult volunteer workforce has returned to action, in the sense that regular volunteering is significantly above 2019–20 levels. However, some caution is necessary in interpreting this increase as it includes a period of pandemic restrictions when volunteering would have reduced during lockdowns. Similarly, while volunteering rates among young people remain 8.1% below pre-pandemic levels, the most recent data relate to the academic year 2021–22.

Coaches, those who provided any other help and those who provide transport have returned at a faster rate than other volunteer roles such as admin and committee roles, refereeing or fundraising. Inequalities also exist in the volunteer workforce and have increased during and after the pandemic restrictions. Fewer women, disabled people and / or people with long-term health conditions, people from lower socioeconomic backgrounds and people from culturally diverse communities volunteer compared to the population as a whole. (Sport England, 2023).



The Cost of Living Insight report (Sport England, 2022) states that a third of respondents are volunteering less, primarily due to time constraints. Conversely, 29% of people have increased their amount of volunteering because they are needed more. The overall effect appears to be that a smaller volunteer workforce is engaged more intensively (Sport England, 2023). The SRA forecast that volunteer input would be 10% higher in terms of time as clubs recovered from the effects of lockdown (SRA, 2021), while Sported found that 16% of groups were operating at reduced capacity because of a lack of paid staff and volunteers (Sported, 2022).

The SRA found that the amount of activity generated by volunteers has declined since before the pandemic, though this was forecast to recover from 2022 onwards. On average, each minute of volunteer time generates almost 40 minutes of participation activity (SRA, 2022). Three quarters of club volunteers were still active during the pandemic (SRA, 2021), which highlights the dependence of the sector on the unpaid sector of the workforce as well as demonstrating how volunteers innovated during the pandemic by organise online activities.

The paid workforce has experienced a reduction in the number of working hours (13%) and some employees have had to find work elsewhere (either within or outside the sector). This percentage is significantly higher among employees from culturally diverse backgrounds. Almost all employees (96%) are concerned for the future of their job or their business, and just over half (53%) would be likely to leave the sector if they lost their job. (CIMSPA, STA 2023).



From the employers' perspective, staff budgets have more than doubled since September 2021 (driven by casual staff budgets trebling over the same period), and 17% of trusts have started or are planning redundancies. (Community Leisure UK, 2022). The same research confirms that where facility closures take place (whether permanent or temporary), there is a negative impact on the workforce as a result of adverse terms and conditions or redundancies (Community Leisure, 2022). ukactive reported that in the early part of 2022, 63% of public sector facilities predicted that they would have to reduce staffing levels (ukactive, 2022a). A follow-up survey in early 2023 with private sector operators found that 43% of respondents had reduced their staffing levels since October 2022, with 58% predicting staff reductions in the next six-to-12 months (ukactive, 2023)

The Sport for Development Coalition (SfDC) reports that the workforce is experiencing severe challenges in sustaining meaningful careers in the sector resulting from zero hours contracts or sessional work. Work in the sector is often poorly paid or underpaid, with limited career progression opportunities, leading to difficulties in retaining staff (Sport for Development Coalition, 2022). A 2023 survey by EMD UK is more forceful in outlining the immediate future for the sector, reporting that as many as 54% of instructors are planning to leave the industry (with a further 2% already having done so). The survey also illustrates some of the effects of increases in the indirect costs faced by the workforce, with 59% of instructors changing their behaviour as result of higher travel costs, and 54% prevented by cost from engaging in continuous professional development courses over the past 12 months (EMD UK, 2023).



5. Summary

Headline levels of the percentage of active people have returned to pre-pandemic levels confirming an apparent recovery in overall activity levels and demonstrating a level of resilience in overall sport and physical activity behaviours. However, beneath this headline figure however, it appears that increases in the cost of living are contributing inequalities in activity levels.

Increases in the cost of living amplify disparities in disposable income which affect the most disadvantaged social and demographic groups disproportionately. Their levels of engagement with sport, physical activity and movement are already relatively low compared with the average, and the indications are that they are declining further as the cost of living erodes their ability to access opportunities.

Some behaviour changes which developed as an early response to increases in the cost of living appear to have bedded in. In other words, the behavioural response is unlikely to be reversed unless and until there is a significant shift in the economic situation at household level, with inflation not predicted to return to the target level of 2% until 2024 (IfG, 2023). Households which have the capacity to withstand the effects of increases in the cost of living have been able to maintain their existing pattern of participation. The most vulnerable households in terms of cost of living pressures are those which are most likely to have disengaged from activity. In the gap between the two extremes, participants have found other ways to engage and have changed their behaviour. The net effect has been a return, at a headline level, to pre-pandemic activity levels.

Activity within clubs and community groups, which drives a substantial amount of participation, also appears to have returned close to pre-Covid levels, though this recovery is not yet complete and organisations that provide activity report that they remain below full capacity. The reality is more complex and nuanced however and holds a mirror to broader trends. Reporting suggests that impacts of cost of living increases are felt disproportionately by those club members who are least able to withstand the financial shock of inflation. Club finances in the short-term are increasingly vulnerable since Covid restrictions. High energy prices are the most significant inflationary pressure, with evidence suggesting that these have not fed through fully to rental arrangements for



most clubs. Clubs which do not own their facilities anticipate higher rental charges as facility operators attempt to recoup their rising costs and clubs which are asset owning are likely to be affected by rising energy costs etc.

Utility costs are the most significant concern for facility operators. The challenge of rising costs is exacerbated by reduced income caused by cancelled membership and there is evidence that external funding streams are being reduced for some organisations. These pressures combined are likely to result in closures for older and more vulnerable facilities which may have implications for provision in communities with lower incomes and in rural areas.

The impact of increases in the cost of living on the workforce in the sport and physical activity sector is similarly complex. Some volunteers have disengaged (though this may be a temporary measure) leaving those that remain with more to do. Output per volunteer has increased, adding to the strain on a workforce which tends to be older than the participants it supports, and placing additional constraints on future growth. While workforce capacity has recovered overall post-Covid, especially among coaches, there is increasing pressure on individuals' time, and a declining ability to pay the direct and indirect costs of volunteering.

Volunteers from culturally diverse groups and those on low income continue to be under-represented, mirroring inequalities in participation, and reinforcing the idea that increases in the cost of living affect these groups disproportionately. Similarly, some paid staff, especially those on low wages and casual workers, are leaving the sector in search of better opportunities elsewhere. Many more are considering following suit as employers consider redundancies and closures as a means of managing the budgets. It is unclear at present how long these pressures on employers and employees will last.

Figure 4 - Quantity and Quality of Evidence

Theme	Count	Commentary	Potential Areas for Improvement
Sport Economy	29	This theme is the best supported in terms of the quantity and quality of data and evidence, with 29 sources, the majority of which are cross sectional analyses.	Academic literature relating to impact of current economic situation not yet available.
Participation	23	Around half of all resources are cross-sectional analyses. Significant volume of data - large scale samples from Active Lives Surveys facilitates detailed analyses of most aspects of participation.	Academic literature relating to impact of current economic situation not yet available. Opportunity to add in more NGB data and insight about participation levels.
Clubs	10	Limited in quantity compared with other themes, but quality is high, consisting of meta-analyses, time series data and cross-sectional analyses.	Limited academic literature relating to impact of current economic situation. Comparison of NGB affiliations and club memberships with pre-pandemic position would identify trends in participation and volunteering.
Facilities	17	Majority of resources are cross-sectional and time series studies but with limited sample sizes. More reliance on policy briefs than with other themes	Moving Communities analysis limited in scope and scale by capacity constraints but offers significant potential to expand knowledge base. Active Places Power data also absent from analysis. Opportunity to track facility availability over time.
Workforce	11	Limited amount of data and analysis in comparison with other themes, but quality is high, featuring time series and cross-sectional analysis of large scale surveys	Academic literature relating to impact of current economic situation not yet available. Opportunity to add in further NGB data and insight to inform the analysis. Meta-analysis offers scope for further research.



Figure 4 outlines some of the strengths and weaknesses of the evidence reviewed in this report. It is clear the quantity and quality of resources relating to the sport economy and to participation supports a more detailed and nuanced analysis of those themes. There are specific datasets (for example, Active Places and Moving Communities) which offer scope to develop new insight which would support all System Partners in their efforts to respond to a dynamic economic picture.

Nevertheless, this review is evidence that there has been innovative co-operation between System Partners to collate of data that is of value to the wider sector. Partner data consistently corroborates the findings of large-scale surveys by Sport England and other central government sources, thereby offering a new perspective on clubs and facility providers. Most crucially, the different layers of data provide new insight to the bigger picture and emerging trends. Gaps remain however, with data from National Governing Bodies detailing the number of clubs, participants, and volunteers offering significant scope for development.

It is important to recognise while that partner organisations tend to conduct research on discreet topics which serve their own interests, there is much to be gained from sharing the information they produce. For this reason, it would be reasonable to consider whether there would be additional value in extending the partnership approach to involve other organisations which could contribute to the discussion.



6. Recommendations

- Sport England and its System Partners have demonstrated an innovative way of working together by sharing data for the benefit of the sector. There is much merit in this process which in principle should be continued.
- There is an opportunity to share further updates to this report over time as the situation changes.
- As a logical consequence of continued collaboration between Sport England and System Partners, the opportunity exists to develop a strategic approach to sharing data, which will enable research to be more robust, to fill more gaps in the knowledge base, and to be more cost effective.
- In line with *Uniting The Movement* the focus of attention needs to be on those with the greatest need to develop and maintain resilient participation habits.
- System Partners should continue to monitor macro-economic data as part of ongoing efforts to explain trends in participation beyond sector-specific trends revealed by sources such as the Active Lives Survey. Specifically, consideration should be given to whether increases in the cost of living are reducing opportunities for people to be active and the extent to which people continue to make changes to their sport and physical activity behaviours.
- This review demonstrates the value of a collaborative approach to evidence gathering in support of policy goals. System Partners should continue to use their data sources such as affiliation data held by National Governing Bodies to monitor changes in activities and behaviour.

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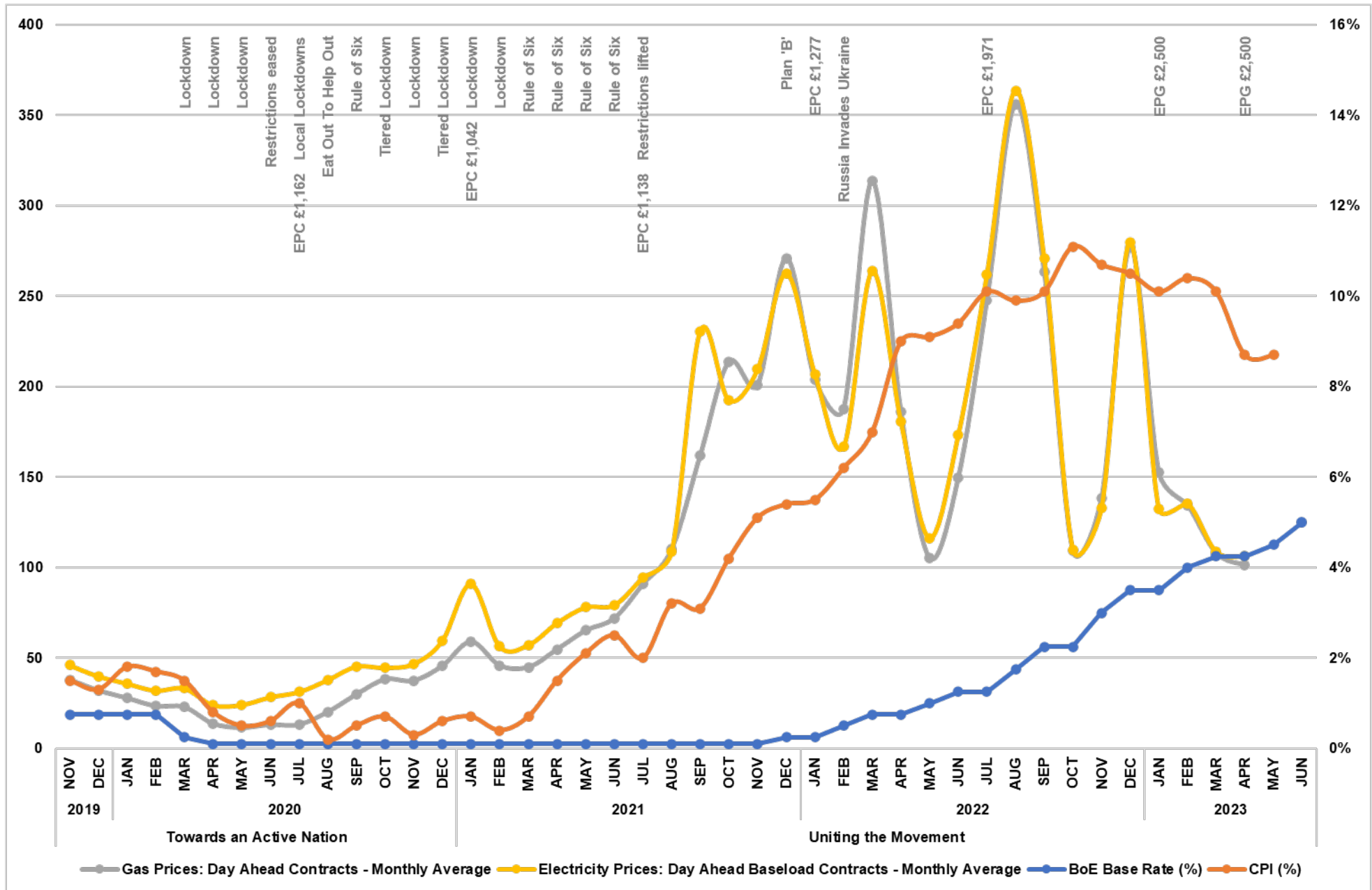
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Appendix 1 – The Broader Context of Increases in the Cost of Living

Any analysis of the impacts of rising cost of living must be considered in the wider context of the effects of the Covid-19 pandemic, because significant structural shifts in the way in which people engage in sport and physical activity have been noticed in the Active Lives Survey data. Examples include: a shift towards informal activity such as walking for leisure; a shift towards outdoor activity rather than indoor; and a shift towards active travel. Factors influencing active travel include 'push' factors such as Ultra Low Emission Zones and high parking costs pricing drivers off roads; as well as 'pull' factors such as better infrastructure for commuter cyclists. These points help to emphasise that fluctuations in physical activity levels may be the unintended consequences of policy decisions and events over which Sport England and its System Partners have limited no control.

In the context of sport and physical activity, this point is well illustrated by the timeline diagram shown in Figure 5, which plots trends in interest rates, inflation and energy prices as well as documenting key policy decisions and unpredictable events (e.g. war in Ukraine).

Figure 5 - November 2019 to May 2023 timeline

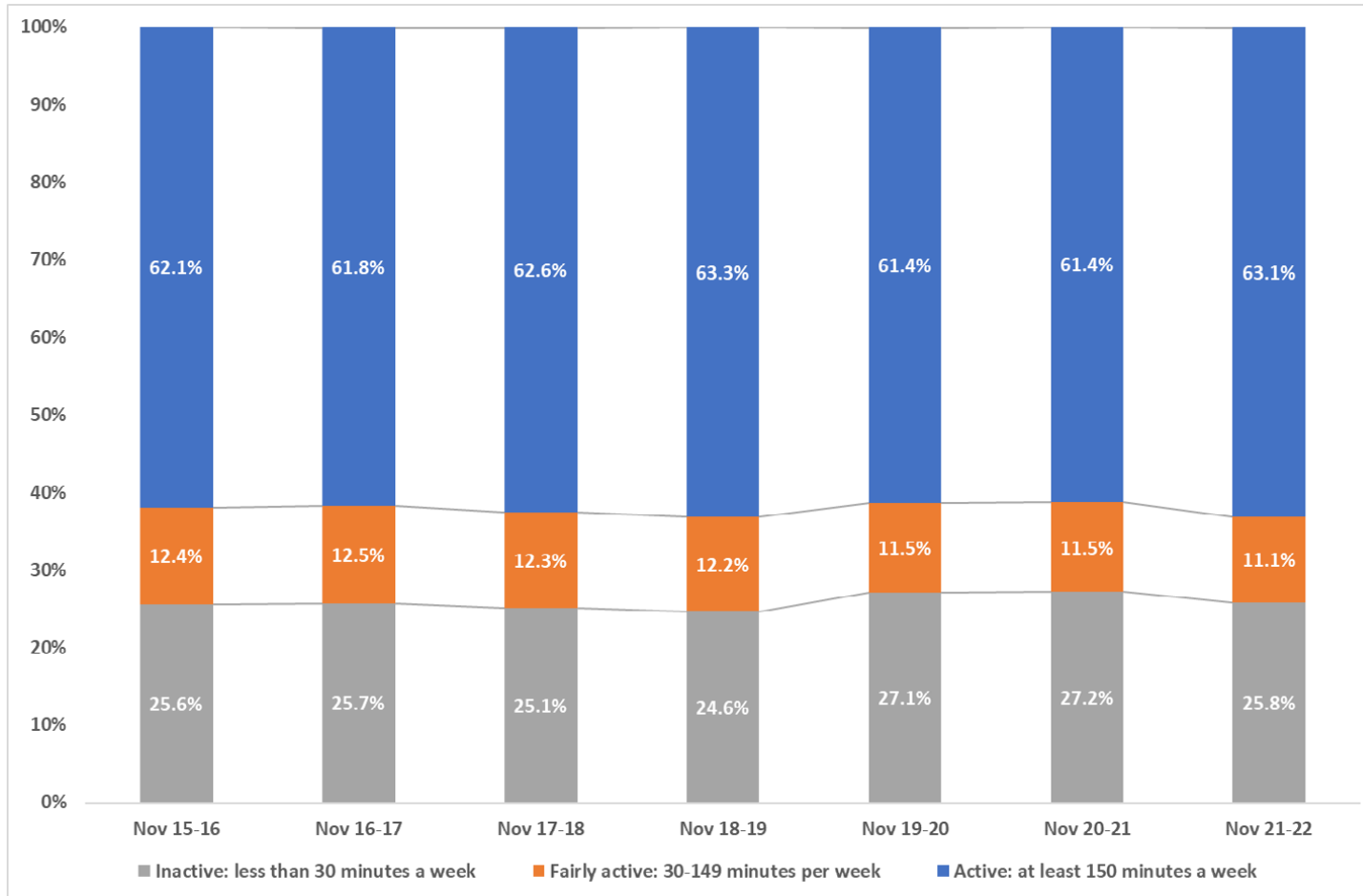


The impact of the pandemic is well-illustrated by the output from the Sport and Recreation Alliance's 2021 survey of voluntary clubs and providers. Their activity shut down overnight as a consequence of 'lockdown' causing organisations to lose an average of 60% of their membership which was forecast to return to 75% of pre-pandemic levels in 2021. Subsequent studies have shown this predicted recovery to be a longer, slower and shallower process, with many clubs reporting that their membership has not yet returned to pre-pandemic levels (Sport and Recreation Alliance, 2022).

In the same period, club and provider income fell by 51%, and expenditure by 41%, while those clubs which used their reserves to cover costs saw those funds decline by 18%. Organisations which had regularly generated a small operational surplus year on year, were effectively forced to cease operations and in many cases use funds which had been set aside for long-term investment, simply to stay afloat. The overall effect of the pandemic was to reduce the financial buffer with which providers would use to withstand a crisis (Sport and Recreation Alliance, 2021).

The categorisation of the levels of adult physical activity for the period 2015/16 to 2021/22 are shown in Figure 6.

Figure 6 - Adult physical activity levels in England 2015/15 to 2021/22



The 2018/19 data point in Figure 5 is the last full year of data prior to the Covid-19 pandemic, which first took hold in the UK in March 2020. The second last bar in Figure 1 (Nov 20-21) coincides with the expiry of Sport England's previous strategy, *Towards an Active Nation*, and the launch of its current 10-year strategy, *Uniting The Movement*. Despite the Covid-19 pandemic and its restrictions as well as the economic consequences of war in Ukraine (February 2022), the headline figures for physical activity levels have been remarkably stable over time.

Appendix 2 – Theory versus Practice

Theory

In theory, the significance of increases in the cost of living is that as people are forced to make choices about how they prioritise their spending, certain types of discretionary spending such as on sport and physical activity may reduce. Consequently, participation in physical activity may decline and the inequalities in participation which already exist may widen. Sport England's Activity Check In data confirms that some people have reduced their expenditure on sport and physical activity. For example, Sport England's Activity Check-In survey reveals that 8% of people have cancelled gym memberships, while 6% have cancelled memberships for specific sports.

The first post-pandemic data point of the Active Lives Survey (November 2021 to November 2022) coincides with some of the cost of living increases. It shows that physical activity levels have increased to more or less the same as their pre-pandemic levels. One interpretation of this is that attitudes and behaviours towards physical activity remain robust following on from the easing of pandemic restrictions. We are seeing recovery in the levels of activities such as active travel, fitness, and swimming in addition, we know that people are most likely to get their active minutes from walking – a free / low cost activity.

Practice

In practice, human behaviour does not necessarily work out as theory might predict for various reasons. Notably, our behaviour influences and is influenced by a range of environmental factors including policy, the physical environment, organisations and institutions, our social environment and our individual experiences, attitudes, beliefs and perceptions. A few examples of how theory and practice do not neatly coincide are outlined below.

- The data we have enable us to identify associations and for us to make reasonable assumptions about the relationship between variables. However, we lack the methodological rigour of longitudinal studies or laboratory conditions to be able to separate out cause and effect.
- Often there is a time lag between an event occurring and its subsequent impacts. For example, although energy prices have been volatile, it is only when the 'price cap' for household energy costs is changed that an actual increase in the cost of energy is experienced. Similarly, households on a fixed rate mortgage might be shielded from the full impact of rising interest rates for several years.
- For many people, sport and physical activity are 'resilient habits for life' and might not be the first items of discretionary spending to be sacrificed if money becomes tight. It is possible for people to substitute some forms of sport and physical activity that incur cost to others that are cheaper, or indeed free. For example, people could trade down from a premium gym membership to a lower cost provider.
- In the case of organised sport, such as that provided by clubs and community organisations there is evidence of measures taken to mitigate increased costs. Examples include: reducing the number of sessions delivered; delaying capital investment; moving to smaller premises; charging members more; and starting matches earlier to offset the need for floodlights.

- Some organisations such as clubs have financial reserves built up over years of operating within their resources or making surpluses. In the same way that individuals have savings that can be used to offset increases in the cost of living, so too some providers of sport have been able to use their reserves, access loans, and even benefit from financial support provided by Sport England and other funders.
- There is evidence that leisure facilities are employing novel techniques to reduce costs. For example, Exmouth Leisure Centre is using excess heat from a data centre to heat a swimming pool to save on water heating costs. While small in scale, and employing as yet unproven technology, it represents an example of innovative thinking to reduce expenditure.
- One impact of the Covid-19 pandemic is that there are some households which made considerable savings by virtue of not being able to go on holiday, day trips or out for meals (Resolution Foundation, 2021).
- The shift to hybrid working for some office-based workers has led to savings in commuting costs and lower expenditure on food and drink. Lower day to day operating costs have created an 'income effect' that may cushion some people from the increase in the cost of living (Resolution Foundation, 2021).

Overlaying the factors discussed above is the importance of realising that not all people will be affected in the same way by certain events. Consequently, generalising is a rather blunt instrument. A more considered approach would be to think about who is affected, how they are affected, why they are affected and for how long any effects last.

Appendix 3 – The Hierarchy of Evidence

As part of this critical look at the data we have graded the studies that form the initial collection of evidence according to a 'hierarchy of evidence' which recognises that research varies in quality and attempts to grade outputs according to their reliability and effectiveness. Generally, the higher up the hierarchy a methodology is ranked, the more robust it is assumed to be, though this is not absolute: a well-conducted, extensive, cross-sectional study may provide more convincing evidence than a poor time series study.

Figure 7 - Hierarchy of Evidence

	Methodology	Example/description	Total	
			n	%
A	Systematic reviews/ meta-analyses	Reviews of data that use transparent and rigorous methodology. Meta analysis includes statistical analysis of results.	2	6%
B	Randomised Controlled Trials	Clinical trials with clear methodology. They use randomised participants and control groups.	0	0%
C	Cohort study	A form of longitudinal study. Follows a group of people with a common or defined characteristic. Can be prospective or retrospective.	0	0%
D	Timeseries study	A form of longitudinal study (not panel). Revisits a cross sectional study or similar after a period of time has elapsed and compares the data.	6	19%
E	Case control	Studies that do not use randomised participants but compare two existing groups (one is a control group).	0	0%
F	Cross-sectional study	Provides data on entire populations based on a sample. Collects data at a defined time.	16	52%
G	Case study/ programme/ qualitative evaluations	Intensive analysis of an individual or group, or intervention. No case control. Descriptive or explanatory.	2	6%
H	Economic evaluations	Employ economic analysis methods to quantify the economic value of an intervention or activity.	0	0%
I	Narrative reviews	Review of literature that does not follow a clearly defined methodology.	1	3%
J	Policy brief Expert opinion/ Scientific statement	Including opinions from well-respected authorities, descriptive statistics, guidelines based on evidence.	4	13%
			31	100%

As Figure 7 shows clearly, just over half of the research resources collated for the first phase of this rapid evidence review are cross-sectional analyses, most of which are based on online or telephone surveys. These are divided into two groups: studies based on secondary analysis of large-scale surveys (such as the YouGov omnibus survey), and; analyses based on primary data collected for a specific purpose (such as the Sport and Recreation Alliance's survey of sports clubs, or Community Leisure UK's survey of facility providers).

Crucially, a further 19% of the published research reports are time series studies which review repeated iterations of cross-sectional research to measure change over time. These papers include analyses of Sport England's Active Lives Survey and the ONS Living Costs and Food Survey (LCF) and Opinions and Lifestyle Survey (OLS). Based on ongoing, large-scale surveys conducted to rigorous standards, these datasets have consistent question sets, enabling longitudinal analysis which results in a higher position on the hierarchy.

There are two studies with the highest grade (A), both of which predate the increases in the cost of living considered in this paper. One is a meta-analysis of the Active People Survey investigating the effects on participation of the last significant recession in the UK which began in 2008, conducted for Sport England. The other is a meta-analysis of the ONS Living Cost and Food Survey on behalf of StreetGames in 2019. While they do relate directly to the period under consideration here, they provide useful historical context and therefore merit inclusion.

The remainder of the resources reviewed to date are a combination of case study and programme evaluations (2), narrative reviews (1) and policy briefings (4) which, though based on well-sourced data, are nevertheless more descriptive in nature and open to a variety of interpretations.

The hierarchy presents a useful starting point for the examination of the body of evidence which has been compiled to date. It is pertinent however, to point out that this is not yet a comprehensive review of all the available evidence. Equally, it does not yet contain any academic literature. Searches of major academic databases revealed that no journal articles or book chapters relating to the impact of the cost of living on participation have yet been published, though this is easily explained by the time taken to clear the peer-review process. In time, it would be reasonable to expect a body of work to emerge, though this will (by necessity) be retrospective rather than offering any forecasts of future outcomes.

A further examination of the evidence by theme helps to identify some of the strengths and weaknesses in the data used to compile this study (Figure 8). Of the 31 resources featured in the report, 26 (84%) contained evidence which informed the discussion of the sport economy, while 20 (65%) supported analysis of participation. Of these, more than half were cross-sectional studies, while just over a quarter were graded A or D. In simple terms, there is a significant body of evidence which feeds into the debate around the consequences of the cost of living on the sport economy and participation, and much of it is of a very high quality.

Figure 8 - Matrix of Data Quality, by Theme

Rank	Methodology	Sport Economy		Participation		Clubs		Facilities		Workforce	
		n	%	n	%	n	%	n	%	n	%
A	Systematic reviews/ meta-analyses	2	8%	2	10%	2	20%	0	0%	0	0%
B	Randomised Controlled Trials	0	0%	0	0%	0	0%	0	0%	0	0%
C	Cohort study	0	0%	0	0%	0	0%	0	0%	0	0%
D	Timeseries study	5	19%	4	20%	2	20%	2	14%	3	33%
E	Case control	0	0%	0	0%	0	0%	0	0%	0	0%
F	Cross-sectional study	14	54%	11	55%	5	50%	9	64%	5	56%
G	Case study/ programme/ qualitative evaluations	2	8%	0	0%	0	0%	0	0%	1	11%
H	Economic evaluations	0	0%	0	0%	0	0%	0	0%	0	0%
I	Narrative reviews	1	4%	1	5%	0	0%	0	0%	0	0%
J	Policy brief/ Expert opinion/ Scientific statement	2	8%	2	10%	1	10%	3	21%	0	0%
		26	100%	20	100%	10	100%	14	100%	9	100%

By contrast, there is less evidence to support discussion of the other three themes. Fewer than half of the research resources used in this report relate to facilities (45%), while only 10 (32%) feature club-related content and 9 (26%) provide information on the sport and physical activity workforce. Neither of the meta-analyses reviewed for this study featured any facilities- or workforce-related content, while 21% of facilities-related resources were policy briefs or expert opinions of a more narrative or subjective nature.

The matrix therefore seems to indicate that analysis of the sport economy and participation is underpinned by a broad range of high-quality resources (supplemented by case-study and narrative research). There appears to be some scope however, to add weight to the body of evidence informing the discussion of clubs, facilities, and the workforce which supports them, in terms of both quality and quantity. In this context, the continuing development of resources such as the Moving Communities database takes on additional significance.

The most notable gap in data provision in this review is that of affiliation information collated by national governing bodies of sport and activity (NGBs). This is a resource of considerable potential value since it comprises detailed information relating to individual members, participants, officials and volunteers which can be aggregated for analysis by demographic and geographic characteristics and there is an opportunity to utilise this information as it becomes available. The planned integration of survey data from national governing bodies into Moving Communities will also add to understanding in this area.