

The Leisure Database Company – Written evidence (NPS0053)

The public sector will be largest provider of sport and fitness participation over the next four years.

1, The demographics, number of sites, facilities, embedded within communities, with dedicated staff, provide the basis of a new force to support our health and education services.

2, Population: The public sector sites are ideally placed, having more people within the core catchment area than the private sector 84.2% of the population live within 2 miles of public sector sites. 90% of the population is the target audience for the public sector. From early years all the way through to old age.

3, Only 10.5% of the population had monthly direct debits with the private sector before the pandemic hit. After permanent closures and changes in behaviour after one year the industry will shrink to around 9%. An estimated one million people (one seventh of the fitness membership) have been displaced due to lockdown and restricted access, digital, outdoors and self-help, encouraged by the Government message to take 'daily exercise.'

4, Facilities

73% public sector sites have studios, (62% private)

72% have sports halls, (3% private)

53% have a pool (33% private, 72% are smaller)

Public sector sites have more fitness equipment stations between 20 – 79, a sweet spot for community sites.

The public sector is uniquely placed with more indoor cycle studios, golf, indoor/outdoor tennis, sauna, steam rooms, badminton courts, squash courts, car parks, the list goes on. Crucially in the current situation - more outdoor space, over 90% more, that's why over 400% more classes have taken place outside in 2020 compared to 2019. This trend will continue.

Noon is now the most popular time to exercise, replacing 5.30pm. During winter months 84% of the population can walk in the light or take a short cycle ride for activities at noon.

The public sector has the sites in the right place, the range of facilities and all imbedded in the community. The Governments number one partner to improve the health of the nation.

5, Movement

Look back in time and consider how exercise is fundamentally strange and unusual behaviour from an evolutionary anthropological perspective. The base natural instinct is to preserve energy, unless it's vital to life, remains part of our evolutionary history.

We never evolved to exercise.

This evolutionary view goes a long way to understanding why the fitness industry struggles to get beyond a total 15% penetration rate and sports, an estimated 35% who do once a week participation.

From 2005 to 2016 the Active People Survey (APS) results did not change significantly yet over the same period Sport England allocated £2.2 billion in exchequer and lottery funding. The NHS suggests 150 minutes of moderate intensity activity a week or 75 minutes of vigorous intensity activity a week. The committee should ask why an estimated £30 million plus was spent on APS attempting to monitor a lower level of activity and why a third of all sports had 'insufficient sample size.' See more on this from the Sports Group submission.

6, This Movement (and Committee) needs to RE-Imagine the product to grow the market

Covid shows that the current sports and fitness industry is not fit for purpose in improving prevention and helping build immunity to the threat of a recurring pandemic.

Covid hits the oldest hardest. Three quarters of people who have died have been over the age of 75 while less than 1% of the population over 75 participate in sports or fitness, when 100% of the population over 75 value their health. Garry Player the golfer at 73 is one of the oldest professional athletes and a great ambassador for remaining active. On a personal level my mother took up yoga in her 80's and a personal trainer in her 90's, my father-in-law has just retired and exercises every day aged 97. It's never too late to start yet both sports and fitness shy away from the older population.

The pandemic cruelly exposed that ageing, obesity and health inequalities are like a disease and so going forward should be treated accordingly.

Exercise, movement and wellness needs to be linked to education and health, from cradle to the grave.

No amount of commercialisation of the fitness product, or the carrot & stick health messages have impacted the majority of the population, so it is time for a fresh approach.

Time for a new mega trend of health and wellness to emerge where movement, fitness and sport is a by-product. Exercise for the masses could be a legacy of the pandemic.

A detailed report by the House of Lords Science & Technology Committee makes a strong case for UK regulators to take an innovative approach. We need the same innovation message from the Sports Committee on expanding sports, exercise and wellness in our communities and working together with Health and Education to improve the health of the nation. Lockdown has proved to be the mother of invention for daily exercise.

David Minton is founder of The Leisure Database Company. The company helped to create and then managed the Active Places database, for England and Wales,

from 2004 till 2015. With over 30 years of experience in the sports and fitness industry more detailed articles on the subject can be found here, <https://www.leisuredb.com/blog>

The Leisure Database Company have developed unique supply demand modelling for the fitness industry along with customer profiling and trend analysis. The company audits the industry each year. Figures quoted in this paper have been taken from the database January 2000.

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