

Written evidence submitted by London Sport

Digital, Culture, Media and Sport Select Committee Inquiry into Impact of Covid-19 on DCMS Sectors

About London Sport

London Sport is the Active Partnership for London. Our vision is to make London the most physically active city in the world. Supported by Sport England and the Mayor of London, our work focuses on enabling more Londoners of all backgrounds to live and enjoy the benefits of active lives.

About this response

We are grateful for the opportunity to submit evidence to this inquiry, and welcome the Select Committee's decision to investigate the impact on DCMS sectors. Our response focuses specifically on the sport sector, by which we refer to physical activity and sport that supports people's physical activity levels. We also draw explicitly on our experiences of working across London's sport sector, though a number of points raised are likely to be consistent with impacts on physical activity and sport nationwide. Our response does not touch on the impacts of covid-19 on the professional or elite sport sector, nor on other DCMS sectors.

Evidence Submitted by London Sport to DCMS Select Committee Inquiry into Impact of Covid-19 on DCMS Sectors

1. Immediate Impact of Covid-19 on Physical Activity and Sport Sector

- 1.1 The widespread but unavoidable disruption caused by the Covid-19 outbreak and the associated lockdown measures make it challenging to outline the full breadth of impact on the physical activity and sport sector. For the purposes of this response, we will outline our current assessment of the immediate impact on the sector itself (specifically community and grassroots sporting organisations; local government sport, leisure and physical activity; charities delivering physical activity and sport programmes; and, self-employed and freelance physical activity professionals) in London, and the impacts on Londoners' physical activity levels.
- 1.2 Surveying of a wide range of community clubs operating in London conducted by Spotted Foundation since the beginning of the UK lockdown measures has shown that a significant number of clubs and community groups have raised the challenge of short-term financial sustainability as their prevailing concern. Surveying conducted in the week prior to 1 April 2020 showed that 41% of community sport organisations were concerned about immediate financial pressures, and more than one in four weren't sure they would still exist in six months' time¹. More recent research covering the whole of the UK (updated 26 April 2020) showed that nationwide concerns around immediate financial commitments had dropped (from 55% to 45%) but that the same 26% still had concerns that they would exist in six months' time².
- 1.3 This issue is particularly acute for smaller community groups, many of which cater specifically to the needs of individuals that are unable to or choose not to engage with more mainstream physical activity programmes. Many such groups are not structured in a way that enables them to build up financial reserves or to survive for prolonged periods of inactivity. While this self-evidently has a direct impact on those groups, the wider knock-on impact on people's physical activity levels is of particular concern. This is explored further in paragraph 1.7 – 1.10. These challenges have been mitigated to a certain extent by the swift response of Sport

¹ Spotted Foundation, *Community Pulse Survey – London*, updated 1 April 2020

² Spotted Foundation, *Community Pulse Survey – UK*, updated 26 April 2020

England (explored further in paragraphs 2.3 – 2.6) but inevitably that response may not be able to counteract all immediate and secondary impacts.

- 1.4 The Covid-19 outbreak is also causing significant disruption at a more structural level. For Local Authorities the management of leisure contracts (including the operation of gyms and leisure centres, the maintenance of sport courts and pitches and other aspects of Local Authority leisure programmes) are raising a number of challenges. There are some concerns, as well, that where Local Authorities face budgetary challenges as a result of the impact of Covid-19 that sport, as a non-statutory service could be deprioritised while more pressing immediate-term responses take precedence.
- 1.5 Other aspects of physical activity and sport delivery have also been impacted. With many parts of the physical activity coaching and delivery workforce being self-employed, financial strain and sustainability has been a considerable factor which has been only partly alleviated by the adoption of digital on-demand activity (more detail on innovative responses can be found in paragraphs 4.4 – 4.7). While it would be safe to anticipate that the eventual easing of lockdown measures will see a workforce ready to return to delivery, there is at least a degree of risk that some aspects of the sporting workforce may not return to delivery.
- 1.6 A significant additional proportion of the physical activity and sport workforce is voluntary. Many of these people's activities have been curtailed, particularly those that worked within club settings, and consequently there is a considerable impact here in terms of social good, finance and sustainability. There is also likely to be a marked impact on those volunteers' own individual well-being, given the well-established positive impact of volunteering on individual mental and social wellbeing.
- 1.7 The impact of Covid-19 on community and grassroots organisations has been previously outlined in this response (paragraph 1.2 – 1.3), but the potential long-term knock-on impact on people's physical activity behaviours is worth highlighting. One consequence of the focuses of participatory sport strategy in the UK over the past five years has been that work to address physical inactivity has been targeted through partnerships with community groups and specialist bodies that have proven track-records of reaching under-represented groups, often in specific localities.
- 1.8 This approach is best-evidenced in the success of programmes such as the Sport England-funded Local Delivery Pilots and other smaller-scale place-based interventions, or in efforts to build physical activity partnerships with sector-specific bodies such as Deaf and Disabled People's Organisations (DDPOs). By their nature, many of these groups are smaller organisations that face a degree of financial peril, or may otherwise be larger organisations for whom physical activity and sport is relatively low on their list of priorities, and thus is at vulnerable in the event of cuts to services. This risks a knock-on impact whereby parts of the population that most require support and intervention by specialist groups are unattended for, thereby potentially entrenching inequalities related to physical activity, and physical and mental health and wellbeing.
- 1.9 Research conducted and published by Sport England in April 2020 suggests that while a significant majority of adults in England (63%) say it is more important to be active now compared to before the Covid-10 outbreak, some people are finding it harder to be regularly active than others – with older people, people in lower socio-economic groups and people living alone all less likely to have done more activity during the lockdown. Some positive potential long-term impacts drawn from this analysis are explored in paragraphs 3.11-3.12.
- 1.10 Forecasting conducted by Portas Consulting as part of the Active Citizens Worldwide initiative, drawing on data from a number of sources and baseline information drawn from the cities of Auckland, London, Singapore and Stockholm, has further suggested that full lockdown measures could cause up to a 70% drop in physical activity levels in urban

environments, though that analysis is based on a hypothetical city environment in which all forms of outdoors physical activity is prohibited. Nevertheless, a milder 'social distancing' forecast (which incorporates continued facility-based physical activity and active travel, both at reductions of 10% from normal capacity) nevertheless forecasts a 15% drop in physical activity levels³.

1.11 While each of these analyses involves a degree of hypothetical assessment, it is clear that there are significant potential risks to the physical activity levels of some groups of people, many of whom may otherwise experience multiple forms of health deprivation. This risks later additional public health challenges where regular physical activity levels play less of a preventative role in the short-term.

2. How effectively has the support provided by DCMS, other Government departments and arms-length bodies addressed the sector's needs?

2.1 In a complex, fast-moving and unprecedented situation, both Government and Sport England have acted decisively to support both the physical activity and sport sector, and its core ambitions.

2.2 Government's decision to protect outdoor exercise as a freedom within the lockdown guidance is an important contribution to the nation's continued physical and mental wellbeing; at a time of significant upheaval and challenge, this is an important and welcome step and is worthy of acknowledgement.

2.3 Similarly, Sport England have provided welcome structural support to the sector and practical guidance to individuals on the importance of continued physical activity. The provision of up to £195m of additional funding to the sector significantly alleviated many of the financial sustainability concerns outlined in paragraphs 1.2-1.3.

2.4 The steps taken by Sport England to simplify funding application processes, and to provide certainty and flexibility for currently funded partners, have also gone a significant way towards addressing concerns around business continuity for the 'structural' parts of the physical activity and sport sector.

2.5 While the responses of Government and Sport England have been broadly positive and proportionate to the level of challenge experienced by the sector, it is important to note the risks that the financial support made available to the sector by Sport England could be exhausted in the event of a significantly-extended lockdown period. We would encourage Government, both through DCMS and via other departments including Treasury, to explore further financial contingencies to support the sector's long-term survival.

2.6 In the event of a further lockdown period, some form of regionalised financial response may be required. Agencies with local expertise, including Active Partnerships (such as London Sport) should be considered as part of the solution to providing targeted local knowledge and expertise.

3. What will the likely long-term impacts of Covid-19 be on the sector, and what support is needed to deal with those?

³ The Active Citizens Worldwide initiative uses detailed socio-demographic, sport and physical activity data to accurately understand the effects of policy interventions or external events on physical activity in the population and resulting health, social and economic consequences. The 'Full Lockdown' and 'Social Distancing' scenarios have been modelled by predicting the number of minutes of sport and physical activity each individual would complete. In the 'Full Lockdown' scenario, it is assumed individuals are not allowed outside their homes for exercise and therefore would only complete individual fitness activities in their homes that do not require any equipment of gym environment. In the 'Social Distancing' scenario, it is assumed that team sports are not allowed and there would be an overall reduction in all other types of sport and physical activity. As the UK approach falls between the 'Full Lockdown' and 'Social Distancing' assumptions, it would be assumed that the impact on London would fall between the 70% and 15% reduction figures.

- 3.1 The long-term impacts of the Covid-19 outbreak are difficult to assess at this juncture, but there are a number of potential scenarios that Government, arms-length bodies and the wider physical activity and sport sector should be prepared to respond to.
- 3.2 Should physical activity behaviours be negatively impacted by the impact of the outbreak and lockdown (for example, through people's behaviours shifting away from regular physical activity as a result of wider changes in their lives, which may be economic, physiological, behavioural or social) parts of the sector that rely on participant revenue for income may struggle to recover in the short-term, creating supply-side pressure particularly where providers are supporting the needs of a particular population group.
- 3.3 These challenges are particularly worth taking into account as they run the risk of deepening and further entrenching some existing inequalities. As the *Health Equity in England: The Marmot Review 10 Years On (2020)* review concludes, a range of factors have contributed to a widening of health inequalities in the past decade, with certain population groups and communities particularly impacted⁴.
- 3.4 As outlined earlier in this response (paragraph 1.8) some of these inequalities run the risk of exacerbation if vital physical activity and sport support and services are reduced because of the impacts of Covid-19. Any long-term support plans should consider their contribution to health equity as a central tenet.
- 3.5 It is also worth noting that those with limited access to digital services or lower levels of digital aptitude may also be less able to access some of the digital delivery activity which has emerged as a means of supporting on-going physical activity, which potentially further impacts on equality of provision.
- 3.6 Conversely, should consumer demand build-up during periods of lockdown, deliverers may face challenges in swiftly scaling-up operations in order to meet need, which may risk missing the opportunity to capitalise on community demand for physical activity provision.
- 3.7 There may also be attitudinal fears among members of the public related to returning to group physical activity delivery once lockdown measures abate, which may require effective public messaging from figures of authority in response. This should be considered with the same degree of importance as the current inclusion of outdoor exercise in government messaging.
- 3.8 In either of these situations, the sector will need support in mobilising which may be some combination of fiscal support and public information campaigning. In its immediate response to the Covid-19 outbreak Sport England has shown its capabilities on both fronts and should be supported in leading these efforts when the time comes. As in recommendations outlined in paragraph 2.6, local agencies should be included in response planning to ensure efforts are effectively coordinated.
- 3.9 In the event that inequalities in physical activity participation are borne out through the Covid-19 outbreak period (as expressed in paragraphs 1.8 – 1.9), government may wish to consider developing new long-term indicators to better understand the impact on long-term health inequalities to better support a targeted, long-term sectoral response.
- 3.10 While this response is focused specifically on the impacts on grassroots physical activity and sport, there may be a knock-on impact in areas where professional and elite sport provide financial support to grassroots provision. For certain sports and forms of activity, this could have a significant impact which may not be fully realised for some time.

⁴ *Health Equity in England: The Marmot Review 10 Years On (2020)*, Professor Sir Michael Marmot, Jessica Allen, Tammy Boyce, Peter Goldblatt, Joana Morrison. See specifically pages 5, 94 & 98.

- 3.11 While there are a number of negative potential scenarios that government should be prepared for, there may also be positive long-term impacts regarding population-level attitudes to the importance of physical activity participation. As Sport England's attitudinal surveying (paragraph 1.9) suggests, a significant proportion of the nation's adult population reports a higher awareness of the value of regular physical activity. If these findings continue to bear out throughout the lockdown period, the sport sector should be prepared and supported to capitalise on this interest both in the short-term through 'at-home' activities and in the long-term in supporting a return to community-based physical activity.
- 3.12 The apparent willingness of the general public to adapt to new ways of accessing physical activity during the Covid-19 lockdown (the popularity of Joe Wicks' daily PE classes, for example) that have low barriers to entry and require little structural investment could also point to solutions for longer-standing physical activity challenges post-Covid-19. Long-term planning for physical activity and sport that reaches beyond Covid-19 impacts could draw on learnings from this period to help reach wider population groups with appropriate physical activity offers in the long-term.
- 3.13 Whatever the long-term impacts of the Covid-19 outbreak on the physical activity and sport sector, it is clear that the widespread health and social impacts of physical activity will play an important role in rebuilding and reconnecting communities in the aftermath of the current period. The sector should be supported in the coming weeks and months to be prepared for that role.

4. What lessons can be learnt from how DCMS, arms-length bodies and the sector have dealt with Covid-19? And how might the sector evolve after Covid-19, and how can DCMS support such innovation to deal with future challenges?

- 4.1 This part of the response deals with the final two queries set out by the Select Committee Inquiry collectively.
- 4.2 Broadly, the lessons from the physical activity sector's response to the Covid-19 outbreak have been positive and are worth reflecting positively on. In particular, the provisions for regular outdoor exercise, direct support to the physical activity and sport sector, and public campaigning on the importance of physical activity are all welcome examples of government and Sport England acting swiftly, decisively and with the sector's needs in mind.
- 4.3 The past month has highlighted the relative insecurity of large parts of the physical activity and sport sector, where the development of significant financial reserves has not necessarily been a key focus or indeed a possibility for many organisations delivering services in the sector. While this experience may encourage the sector to take a more mindful approach to business sustainability, considering the future economic needs of smaller organisations that make a significant contribution to the sector could also be a partial focus for government and Sport England as part of the post-lockdown recovery period.
- 4.4 The immediate response has also showed how different parts of the sector are differently geared towards adopting digital and technological practices to maintain activity during this period of operational upheaval.
- 4.5 Through London Sport's work, we have detected an impressive ability from within the SportTech community to quickly bring new products and services to market to support physical activity delivery. This has also been exhibited by a number of larger bodies within the sector, including commercial gyms and leisure chains, and larger National Governing Bodies of Sport.

- 4.6 While some community groups have been well-placed to respond in this way, others have been left attempting to play catch-up and perhaps lacked strong digital and technical skills to support the intention to deliver activity during this period.
- 4.7 While government and Sport England have advocated for a wider adoption of tech and digital approaches for physical activity and sport in recent years, this should be considered a significant area of focus in the medium-term. Supporting a more widespread adoption of tech and digital by physical activity and sport bodies can help to both mitigate the impact of any similar future challenges, and to present a new front for integrating physical activity into people's normal lives.
- 4.8 Finally, government's commitment to encouraging regular physical activity should be retained throughout and beyond the social recovery from Covid-19. Its health, social and economic benefits are well-evidenced and long-standing, and a more widespread adoption could be a lasting, positive legacy for the nation.