

Sports Participation - UK - September 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“Fitness is both the main driver of participation in sport and the principal barrier to taking part. Successful providers need therefore to articulate the fitness benefits of their activities while allaying the fears of potential newcomers that they are not fit enough to join in.”
– **David Walmsley, Senior Leisure Analyst**

This report looks at the following areas:

- **Is everyone fit enough to play?**
- **What opportunities can the rise of hiking create?**

The sports participation market has now reversed recent losses of casual players but owes its revival more to the continuing strength of fitness-focused activities than to the appeal of more traditional team, competitive and racquet sports.

However, fitness concerns are not just the main driver of interest in playing sport but also present the principal barrier to getting more people to take part.

Sports that are not overtly fitness-led may therefore need to do more to promote their conditioning benefits to those who are choosing gym-based activities instead, while developing parallel pathways that de-emphasise the fitness requirements of beginner-level play could help overcome the fear of potential recruits that they are not fit enough to join in.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Sports Participation - UK - September 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Covered in this Report

Executive Summary

The market

Sport a regular fixture for most

Figure 1: Sport participation*, November 2015-November 2016

Strong core supports value growth

Figure 2: Forecast of consumer expenditure on participation* in sport, 2012-22

Fitness sports in best condition

Figure 3: Most popular sports, by participation rate*, November 2015-November 2016

Tennis courts net new investment

Figure 4: Top 10 types of registered sports facilities in England, August 2017

The consumer

Participation rates bounce back

Figure 5: Participation in sport (net), June 2014-July 2017

Hiking and weights make strongest gains

Figure 6: Sports most commonly played in the last 12 months, June 2014-July 2017

Playing for fitness – but also for fun

Figure 7: Motivations for playing sport, July 2017

A mental barrier of physical fitness

Figure 8: Barriers to participation in sport, July 2017

Spectator sports connect with players

Figure 9: Interest in spectator sport, July 2017

What we think

Issues and Insights

Is everyone fit enough to play?

The facts

The implications

What opportunities can the rise of hiking create?

The facts

The implications

The Market – What You Need to Know

Sport a regular fixture for most participants

Strong core supports spending growth

Fitness sports set the pace

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Sports Participation - UK - September 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Sports fund more facilities

More groups to help get more people active

Market Size and Forecast

Sport a regular fixture for the majority taking part

Figure 10: Sport participation*, November 2015-November 2016

Strong core supports value growth

Figure 11: Consumer expenditure on participation* in sport, 2012-22

Forecast

Figure 12: Forecast of consumer expenditure on participation* in sport, 2012-22

Forecast methodology

Market Segmentation

Fitness sports in best condition

Figure 13: Most popular sports, by participation rate*, November 2015-November 2016

Market Drivers

Tennis courts net new investment

Figure 14: Top 10 types of registered sports facilities in England, August 2017

Government widens participation in widening participation

Figure 15: Sport England funding of national governing bodies of sports, 2017-21

More affluent players lock in participation rates

Figure 16: Current financial situation compared to a year ago, by financial situation, January 2017

Wellbeing gains boost health of sport

Technology making sport more social

Figure 17: Sources of content shared on social and media networks other than users' own content, March 2017

Key Players – What You Need to Know

Grassroots sport caught on camera

Avatar athletes setting the pace

A new strategy for swimming

Launch Activity and Innovation

Playing for clips

Running tracked

A long-distance triathlon

Cricket aims to bowl over children – and mums

Team games for individuals

Governing Bodies

Swim England

UK Athletics

British Cycling

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Sports Participation - UK - September 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The FA
R&A
Lawn Tennis Association

The Consumer – What You Need to Know

Participation rates recover recent losses
Hiking and weights make strongest gains
Playing for fitness – but also for fun
A mental barrier of physical fitness
Spectator sports connect with players

Sport Participants

Participation rates bounce back
Figure 18: Participation in sport (net), June 2014-July 2017
A less physical challenge to revive old interest
Figure 19: Non-participants in sport, July 2017

Sports Played

Hikers stride forward and weightlifters power up
Figure 20: Sports most commonly played in the last 12 months, June 2014-July 2017
Fitness focus continues to dominate
Figure 21: Types of sports played, July 2017

Motivations for Play

Fun v fitness?
Figure 22: Motivations for playing sport, July 2017
Or fitness + fun?
Figure 23: Repertoire of motivations for playing sport, July 2017

Barriers to Participation

Revival of the unfittest
Figure 24: Barriers to participation in sport, July 2017
Personal is best for clearing high hurdle of fitness
Figure 25: Sources of inspiration for participation in sport, July 2017

Spectators and Players

Participants switch to sofas and stands
Figure 26: Interest in spectator sport, July 2017
Heroes' halo effect lasts into older age
Figure 27: Interest in spectator sport, by experience of participation in sport, July 2017
Social channels open a path to participation for potentials
Figure 28: Discussion of sport on social media, by experience of participation in sport, July 2017

Appendix

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Sports Participation - UK - September 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Data sources

Abbreviations

Fan chart forecast

Figure 29: Forecast of consumer expenditure on sports participation, 2017-22

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com