



## Horizon scanning

The trends that will impact sport and physical activity to 2031 and beyond...



[Trends](#)

[Next steps](#)

[Resources](#)



## About

The horizon scanning project was undertaken to reveal the trends that will impact sport and physical activity to 2031 and help inform Uniting the Movement, our 10-year strategy to transform lives and communities through sport and physical activity.

In this document you can explore the 15 core trends reviewed, including a summary of each, how it might develop in the future and what this may mean for the sport and physical activity sector.



Each core trend has three components:


- 1 Trend overview**  
An overview of the trend area and the current trajectory of important drivers
- 2 Looking ahead**  
How this trend area could develop in the future based on current trajectory and expectations, and what this could mean
- 3 Potential impact**  
for the sport and physical activity sector  
An outline of some of the key implications for the sport and physical activity sector, based on the current trajectory and future expectations of the trend area

The trends presented in this document are based on the best evidence and data available at the time of publication.

The implications and possible impact of the trends are intended to present a high-level view, and not an exhaustive list of possibilities.



15 core trends have been grouped by the following themes:

Economy and employment	Demographics	Society	Technology and connectivity	Community and activity
Multispeed economy 	Ageing society	Health and wellbeing	Democratisation of information	Active travel
Individual economy	Diversified demographics	Social equity	Heightened consumer expectations	Place and space
Evolution of work	Younger lives	Greener lives	Digital leisure	Cohesive communities



# Multispeed economy



The coronavirus (Covid-19) pandemic sent the UK economy into recession and while the recovery has begun, the longer-term economic outlook remains dependent on whether further restrictions are needed to control the virus, the strength of consumer spending and the lasting effects of Brexit.

In the wake of the global financial crisis in 2008, the UK's economy contracted significantly, but relatively similarly, across the country. However, the recovery that followed was less even, with London and the South East experiencing far greater growth, increasing existing regional inequalities.

There's potential for an unequal recovery to happen again over the next decade – with economic scarring projected to weigh unevenly on the outlook for different places, sectors and groups of people.

Squeezed public spending and higher taxes could both be a feature of approaches to address the large budget deficit and other macroeconomic issues, and both will be key factors in the geographical evenness of any recovery.

The economic consequences of the pandemic are also likely to create challenges for the government's levelling-up agenda.

Looking ahead



Potential impact

# Multispeed economy



## Looking ahead

- As the economic shock of the pandemic subsides, the crisis may result in permanent damage, or 'scarring' to the economy
- We may see economic adversity in the short to medium term, with lower levels of GDP and higher unemployment and inflation than would otherwise have been expected.
- As a result, there may be higher taxation to enable government spending as it attempts to address deep lying macroeconomic challenges.
- Certain regions and sub-regions are likely to be more adversely affected economically than others, particularly those struggling prior to the pandemic.
- An unequal recovery could lead to a widening of inequalities at regional and local level, and even greater polarisation in the lives and experiences of individuals.
- This may accelerate projects, initiatives and investment aimed at reducing disparities, given commitments to the levelling-up agenda.

# Multispeed economy



## Potential impact

- Economic adversity is likely to create direct challenges for business/club funding – particularly those reliant on public or local funding.
- Lower consumer spending on equipment, membership and subscriptions would affect existing business models – lower cost entry into sports and activities will be key.
- Economic factors may have an even larger impact on participation – widening gaps in participation due to issues of affordability and access.
- Urgency of the economic climate may reduce political and individual focus on sport and physical activity as a priority.
- Alternatively, there could be greater support and scrutiny for the role sport and physical activity can play as part of the levelling-up agenda.
- There may be greater demand and emphasis on local, place-based approaches to understand and respond to the needs of communities.



## Economy and employment

# Individual economy



The economic prospects for people in areas such as employment, spending power and consumer confidence have become more uncertain and uneven given the continued fallout from coronavirus and the interventions imposed to mitigate its impact.

The easing of lockdown in Spring 2021 set the stage for a snap back in consumer activity, but there's still likely to be longer-term adversity for many.

Income inequality – set to rise even before the pandemic – is likely to be exacerbated by the ongoing economic fallout from coronavirus.

This will be driven by a lack of real wage growth and rising housing costs being more acutely felt by lower-income households, magnifying existing inequalities and resulting in greater consumer fragmentation.

Young people, individuals from culturally diverse communities and those already on low incomes or experiencing poverty are likely to encounter the worst of the economic adversity.

Disposable income will become increasingly volatile as jobs become less secure and more people work in precarious forms of employment.

Looking ahead



Potential impact



# Individual economy



## Looking ahead

- Unemployment to rise and remain above pre-pandemic levels over the next 1-3 years as the job retention scheme expires and an uneven economic recovery begins.
- Underemployment expected to grow in the next 3-5 years as precarious employment rises and automation technologies disrupt workforces and industries.
- However, labour shortages in key areas of the economy – due to a lack of necessary skills in the workforce – may last several years and further hinder economic recovery.
- Disposable incomes will be reduced and more volatile during the recovery – with unemployment relatively high, living costs rising and growth in real wages stagnant.
- Economic inequality will also increase as more people experience hardship – reversing the downward trend seen since the 2008 downturn.
- Overall effect of more precariousness and volatility in the lives of a growing number of people – with individuals less able to plan either their spending or time.

# Individual economy



## Potential impact

- Reduced incomes could mean less money for memberships, exercise classes, clothing and equipment – representing a barrier to participation.
- Income volatility will make it harder for individuals to make financial commitments.
- Short-term, rolling memberships, or 'pay as you go' could become increasingly important.
- Reduced and disrupted employment is likely to lead to fewer opportunities for active travel.
- The sport and physical activity workforce may become increasingly precariously employed, affecting the quality of experience.
- Disruption in employment could lead to people with more diverse experiences and skills entering the workforce.
- Individuals may increasingly reach out to non-traditional outlets for physical activity participation and guidance.

# Evolution of work



The last recession saw significant changes in how people work, with new technology and models of employment giving birth to the gig economy.

As a result, work became more precarious for many, contributing to income instability and less predictable working lives and routines.

The economic and public health consequences of the pandemic have prompted another acceleration in the shift towards more agile business practices – with the rapid uptake of remote working further influencing how, where and when we work.

Commuting and working patterns will continue to change as people live further away from, and travel less frequently to, work. Workers are also placing less importance on work in their lives and less importance relative to friends, family and play.

The ability to work flexibly to accommodate more important interests could contribute to greater de-regulation of time spent working, with the five-day working week coming under increasing threat. However, these dynamics will be less relevant to people in precarious employment or those facing challenges in finding work.

Looking ahead



Potential impact



# Evolution of work



## Looking ahead

- Remote working levels, and therefore time spent in offices and commuting, will remain largely dependent on the type and severity of restrictions in place due to coronavirus.
- Some changes accelerated by the pandemic will be sustained, such as agile business practices and people retaining more flexible working arrangements.
- Despite this shift, many individuals and organisations are likely to retain offices as their primary places of work.
- Work is likely to continue declining in importance relative to family, friends and leisure – especially among those with greater economic security.
- Precarious forms of work are likely to increase, with automation also increasing the risk of widespread job displacement.
- The technology capabilities of the population will continue to grow, leading to changes away from work.
- However, the rapid shift in technological infrastructure may exacerbate the inequalities experienced by digitally excluded groups due to lack of skills and access.

# Evolution of work



## Potential impact

- Changing locations and patterns of work will influence the spaces where sport and physical activity is delivered and accessed.
- The make-up of high streets and areas previously reliant on office workers may evolve to meet changing demand.
- People will increasingly look to local amenities – possibly driving greater demand for things like green spaces.
- This may give some people greater control over their time and opportunities to be active – remote workers for example will have greater flexibility – starting work later, extending lunch and finishing earlier.
- Others may have less control – those in precarious employment will contend with inflexible hours and stability of income, affecting opportunities to be active.
- Wellbeing policies will be increasingly required to accommodate remote work, and encourage healthy behaviours.
- Opportunities for physical activity may increasingly be delivered online, with providers required to adapt their services and skills to meet demand.
- Greater flexibility to attend activities at a wider range of times may lead to more diverse supply and demand.



## Demographics

# Ageing society



The UK is experiencing a slow and sustained demographic shift towards an ageing population.

As more people live deeper into old age we'll see a growth of chronic physical and mental health conditions and an increase in demand for health services.

The burden of an ageing society on public finances is set to grow significantly and will increase demand for paid and unpaid health and social care.

Reduced healthcare delivery in 2020 as a result of the pandemic may also have a profound and lasting legacy.

Looking ahead



Ensuring people are living healthier lives will have an important curative and preventative role in reducing the impact of chronic conditions in the future, with conditions set for it to become an increasingly important feature of public health policy.

Younger audiences may also be affected as 'intergenerational conflict' and competition for resources becomes more acute.

Younger people are less active democratically and this shift will see them increasingly outnumbered and holding less influence over policy decisions.

Potential impact



## Demographics

# Ageing society

## Looking ahead

- The UK Population will have an increasingly 'older' age profile, with significantly more individuals at old age in 2030 than 2020.
- As the number of people living into old age grows, so will the number of people living with long-term or chronic health conditions, and those experiencing multiple conditions at the same time.
- The investment required to meet growing healthcare needs will represent a large and rapidly increasing proportion of public spending.
- Wider demand for public resources required by older groups will grow as 'Baby Boomers' reach retirement.
- Emphasis on exercise and wellbeing as a cost-effective preventative measure to support healthy ageing will increase.
- The impact of an ageing population will extend to younger generations in terms of where resources and spending are prioritised.

## Demographics

# Ageing society



## Potential impact

- As the prevalence of both physical and mental health conditions grow, the relevance and appeal of different forms of physical activity is likely to change.
- The importance of physical activity as a preventative and alleviative remedy for long-term health conditions will grow.
- Physical activity may become a more central part of strategies to drive a healthier, more mobile and independent older population.
- The leisure-focus of 'new' older groups could see demand for experiences and activities rise.
- Time-poor older adults may be less keen to commit to regular volunteering.
- The needs, capabilities and expectations of older cohorts will fragment, with a greater requirement for diverse and inclusive services.
- Perceptions and definitions of physical activity may need to shift to ensure inclusive practices and activities.
- The sector and workforce need to be better equipped to understand and meet the needs of older audiences and those at risk of poorer health.



## Demographics

# Diversified demographics



Demographic profiles, definitions and characterisations are changing – with traditional identities, the ways in which diversity is understood and when we experience important life events shifting.

As society becomes more progressive and sensitive to how individuals want to be identified, organisations will be increasingly required to meet the needs of a much more diverse and less traditionally identifiable consumer.

The life-stages we inhabit are also shifting – childhood is shortening, while the 'teenage' phase of life is lengthening.

The pre-family young adult stage is extending significantly as parenthood is delayed, with the amount of time spent in the post-family stage of life set to grow considerably.

The UK will continue to become more ethnically diverse and while this growth won't be geographically even, it'll contribute to a shift in the composition of local populations and the services they require.

The current generation of parents are also more liberal in their attitudes to gender and sexual identity than those before them.

Looking ahead



Potential impact



## Demographics

# Diversified demographics



## Looking ahead

- The meaning of age will continue to shift with changes to the life course – with a greater proportion of the population in the pre and post-family stages of life.
- Societal values will become more progressive, with consumers increasingly reluctant to engage with organisations that fail to keep up with social attitudes.
- Consumer expectations of inclusive practices towards race, gender, disability, religion, sexual orientation and other protected characteristics will increase.
- Traditional demographic groupings will become increasingly unfit for purpose as a way of defining and describing people.
- There'll be a growing understanding of gender as non-binary and the number of people identifying as non-binary will increase.
- Society will continue to become more ethnically diverse, with people from culturally diverse backgrounds representing an increasingly larger proportion of the population.

## Demographics

# Diversified demographics



## Potential impact

- Audiences will become increasingly diverse, affecting how the sector engages, communicates, and creates relevant offers.
- There'll be an increasing imperative for the sport and physical activity workforce to be knowledgeable about – and sensitive to – changes in the demographic profile of their customers.
- As pre and post-family age groups expand, and with the most free time and disposable income, they could become two of the most relevant life-stages for providers to engage.
- Non-binary understanding of gender may pose challenges for competitive and contact sports, that currently rely on a male/female binary.
- Leisure venues with changing rooms and male/female specific classes will increasingly need to consider how to be inclusive for all gender identities.
- An increasingly diverse population and market will have significant implications for governing bodies and policies around equality, diversity, and inclusion.



## Demographics

# Younger lives



In the long-term, children are making healthier choices in some areas of their lives, such as consuming less alcohol and lower rates of smoking. However, the majority of children are still not moving enough to meet recommended levels of activity.

Comparatively high levels of obesity – unchanged over the long-term – will remain an issue and one defined by inequalities.

Poverty rates for children are projected to increase, with a range of health and wellbeing outcomes set to become further polarised.

Time allocated for PE in school has declined as the focus on academic attainment and core subjects has intensified.

Academic pressure is also contributing to poorer mental health, with children in the UK having the lowest levels of life satisfaction in Europe.

The pandemic has also put the mental health of young people under increasing strain.

As true digital natives, younger people are spending more time online, in more technologically sophisticated ways. They are, however, vulnerable to excessive use and a lack of skills.

The effects of the pandemic are set to take an ongoing, yet uneven, toll on the lives of young people, potentially widening inequalities and adding to the mounting socio-political challenges they face.

Looking ahead



Potential impact



## Demographics

# Younger lives



## Looking ahead

- Curriculums will continue to dictate activity levels within schools – the current status quo could see physical education fall – but a shift in emphasis, toward improving the health of students, could see it rise.
- The pandemic has led to a stark increase in mental health disorders and referrals among young people – this will take a toll on their development and increase the strain on health services.
- If damaging consumption continues to fall, government, public health bodies and parents could focus more of their attention on nutrition and activity.
- However, child poverty is likely to increase, with implications for both the physical and mental health of children.
- Technology will play an increasingly prominent role in children's lives – augmenting their experiences of sport and physical activity and competing for their time and attention.
- Fears of a 'lost generation' due to coronavirus may be unfounded, its impact will, however, add to the mounting challenges young people face in the form of competition for public funding, social justice and climate change.

## Demographics

# Younger lives



## Potential impact

- Parents are far more health conscious than their predecessors, and are more receptive to health messages regarding their children.
- There could be an increased emphasis on exercise outside of school, if PE continues to fall down schools' list of priorities due to changes in the curriculum.
- The pandemic has undermined efforts to increase non-PE activity levels in schools, with reduced movement in play-times and between classes.
- Sport and physical activity will increasingly be forced to compete with digital technology for children's attention.
- However, and if done safely, technology also has the potential to support activity in children through apps, platforms, or media channels designed to get children moving in some way.
- There could also be a growing role and opportunity for the sector to support better mental health and well-being in young people through physical activity.



Society

# Health and wellbeing



While obesity and diet remain an issue, consumers are more health conscious than they've been in the past.

With the stigma around mental health falling, there's been a significant increase in demand for mental health services.

The effects of the pandemic are likely to exacerbate many of the health challenges facing the country, such as an increase in the number of early or preventable deaths from disease or illness.

Broader attitudes to health are changing, however, and the pandemic could lead to sustained and positive lifestyle changes.

Looking ahead 



Shifting consumer expectations will also drive market forces and inform the provision of public health services, as people are given more choice on decisions about their health.

Health looks set to become an increasingly important metric when measuring societal success.

With healthcare becoming increasingly commoditised, services utilising digital technologies and individuals' health data are set to emerge.

New health inequalities may follow, with wealthier consumers better able to identify and access specific health or exercise needs.

Potential impact



Society

# Health and wellbeing



## Looking ahead

- Continued health polarisation based on differences in lifestyle and consumption habits across different groups.
- The prevalence of mental health conditions is expected to grow and could increasingly shape government policy as a result.
- Health becomes an increasingly common way of understanding success in governance.
- The consumerisation of health and wellbeing is likely to increase – in both public and private sectors.
- ‘Light touch’ interventions, such as social prescribing, could grow as a method for reducing demand for NHS services.
- Health indicators and outcomes are likely to become better measured and better analysed as more data is produced.
- People will become increasingly interested and capable of collecting data and ‘quantifying’ their own health and wellness.





Society

# Health and wellbeing



## Potential impact

- The health landscape will fragment; more people will live healthier lives but many will get left behind and widen inequalities.
- Health services are likely to increasingly resemble consumer-facing businesses as part of the NHS' Long Term Plan.
- A greater emphasis could be placed on health by government, with physical activity considered a vital strategy to mitigate impacts of the ageing population.
- The health and wellbeing sector is likely to have increasing reach into certain audiences that have most to gain from being physically active.
- A person's health and wellbeing, plus its relationship to being physically active, could be better measured and analysed as the use of tracking technology advances.
- The level of data available to the sport and physical activity sector may allow a much better understanding of consumers.



## Society

# Social equity

Societal attitudes toward inclusion and diversity have become far more accepting and progressive, but prejudice and other forms of ‘pushback’ still run through society.

Despite the general trend towards greater public acceptance and institutional protection of equality, persistent inequalities remain – with many predicted to worsen as a result of the pandemic.

And despite long-term progress in some areas – such as the gender pay gap – many structural inequalities and their determinants are too deeply entrenched to shift by 2030.

The government’s ‘levelling up’ agenda could help deliver

greater regional equality – with new infrastructure and investment in the North and the Midlands designed to improve everyday life.

Social mobility may decline, however, due of the rising economic and educational inequalities brought about by the pandemic.

The pandemic and the Black Lives Matter movement have also brought issues of race and racial inequalities to the forefront of national discourse.

Cultural divides and a polarisation of views on societal values and social justice mean they’re becoming increasingly politicised and complex issues to navigate.

What we expect



Potential impact



# Social equity



## Looking ahead

- Growing inequalities and issues of social mobility will contribute to a widening of experience and outcomes based on a person's ethnicity, affluence and health.
- This will also exacerbate existing challenges around how representative leaders, workforces and sectors are of society.
- Expectations of organisations to display progressive, inclusive values will continue to grow, as will criticism for those who fail to meet rising standards.
- The debate is likely to shift from one of equality to one of equity.
- Society will continue to become more progressive over the next decade, driven by both generational and time period effects.
- However, there'll be continued instances of pushback (e.g. recent rises in hate crimes) and polarisation of views on issues of social justice.
- The political views of older groups are likely to become increasingly relevant to policy decisions due to growth in numbers and higher voter turnout – therefore, issues facing young people may fall down the agenda.



# Social equity



## Potential impact

- With older generational groups better represented by government policy, emphasis on the needs of younger people may be required to fill gaps left by policy.
- Shift from equality to equity will increasingly become the norm, possibly reducing barriers to the targeted – but uneven – dispensation of funding.
- A lack of diversity and under-representation of groups in higher leadership levels could undermine efforts to promote more inclusive practices.
- Issues of social justice will become difficult to navigate as views polarise, with a growing expectation on those in the sector to take a position on questions of equality.
- The workforce will need to become more diverse to better serve, and be more representative of, its audiences.
- There will be an increasing onus on organisations to develop transparent diversity and inclusion policies that pre-empt unprecedented issues around diversity of gender, race, sexuality and religion.





## Society

# Greener lives



The continuing effects of climate change are well documented, with more extreme weather increasingly likely to impact when and where physical activity takes place.

Protecting the environment will become a significant driver of policies designed to increase active travel – as the need for more active forms of transport to help reduce emissions grows.

Short-term changes in behaviour brought on by the pandemic – higher rates of active travel and the staycation boom of 2020 – could help drive environmentally friendly policies.

However, despite increased

public awareness, concern about climate change is rarely a strong enough driver to change people's behaviour on its own.

The government is promising a 'green recovery' for a more environmentally friendly economy – putting into law a new and ambitious target for reducing emissions by 2035.

However, a stalling economy may increase the focus on shorter-term policies aimed at stimulating economic growth.

As consumer attitudes develop, there's been a huge growth in products and services that aim to cater to the environmentally conscious consumer.

Looking ahead



Potential impact

## Society

# Greener lives

## Looking ahead

- Government is expected to increasingly embrace the green agenda as a way of helping to reduce emissions, create jobs and enable ‘green innovation’.
- Consumer attitudes toward the climate crisis are likely to bounce back and intensify following the pandemic, driven by the greater urgency placed on this issue by younger generations.
- Consumers are also likely to become more receptive to green products and services, but climate concern – on its own – is likely to remain a weak driver of changes in behaviour.
- People will still be more likely to be incentivised to walk or cycle for journeys if it’s convenient, safe and cost-effective, rather than because it’s better for the environment.
- Weather becomes more volatile, with higher incidences of heat waves or extended spells of wet weather.



## Society

# Greener lives

## Potential impact

- Green agenda could see new regulations in building and energy consumption, which could affect sport and physical activity venues.
- Greater demands on the sector to demonstrate its green credentials and effectively manage its carbon footprint.
- Increasing emphasis on climate and sustainability could create longer-term challenges for environmentally intensive sports.
- More volatile weather will impact mass participation outdoors, with activities such as football, running, walking and cycling at greater risk due to extreme rain or heat.
- The sports and physical activities people choose to take part in are likely to be increasingly dictated by emerging weather patterns.
- Consumers are likely to become more receptive to ecologically beneficial behaviours, like active travel.
- Growing opportunities to align sport and physical activity and the role it can play to a greener political and social landscape.

## Technology and connectivity

# Democratisation of information

Individuals and organisations alike are increasingly able to access, and contribute to, the global sphere of information.

Access to the internet started to reach a saturation point in 2019, with growth in internet use over the next decade expected to be primarily driven by uptake in the over-55s. The main divides will be on skill levels, confidence, and quality of access.

More people are able to access and contribute to online information, making it easier to learn skills and find new or different ways to participate.

However, this may lower the quality of information available and contribute to the growing

phenomenon of echo chambers, pre-filtered content, and reduced trust in experts.

Democratisation is changing where people go for their information and learning needs, with social media channels and 'word of mouth' reviews all used more regularly than BBC or government websites.

Consumers are also showing more concern about the accuracy of information they find online. Growing scepticism, however, applies to both factual and false information.

The quantity and quality of data that individuals in the UK produce and share is also expected to increase.

Looking ahead



Potential impact





# Democratisation of information



## Looking ahead

- Internet access becomes almost completely ubiquitous as uptake increases in older age groups.
- The narrative of 'digital divides' will become less about accessibility and more about skills, confidence, sophistication of use, and devices or channels of access.
- The information environment will continue to grow in complexity, making it harder for people to find good quality and reliable information online, putting a further premium on skills.
- The pandemic will likely leave a tech legacy, with higher levels of digital skills, greater comfort with video interaction and greater use of online services.
- Increased internet use and device ownership creates wider opportunities to engage with people and for data collection.
- Increased gathering of both big and small data, and advances in data analysis driven by artificial intelligence (AI), will allow for a deeper understanding of consumers and how they behave.

# Democratisation of information



## Potential impact

- Reaching people with information about physical activity services and initiatives could get easier, but there will be a growing number of competing resources.
- Complexity of finding information online could also make communicating and reaching people with appropriate advice on issues like health more challenging for the sector.
- Availability of information could disrupt existing supply, with individuals capable of finding advice, or taking classes, on their own at home.
- Online communities of interest and peer-to-peer interactions could become increasingly valuable sources of information for people.
- Quantity of data produced by existing and potential audiences will grow, requiring organisations to develop better data gathering, analysis and protection skills to understand them.
- Sport and physical activity workforce will require the skills and capabilities to keep up with technological changes.



## Technology and connectivity

# Heightened consumer expectations

Technology has become increasingly instrumental in the ability of organisations to improve offers and service delivery – be that 24/7 customer service or same day delivery – and consumer expectations have risen in response.

As the amount of data produced by individuals has increased, so have the capabilities of businesses to understand and respond to it.

This has led to the emergence of mass personalisation and curated choices, with transactions and experiences increasingly tailored to meet an individual's wants and needs.

The growth of smart phone usage and data-driven services means that today's consumer is 'always on' and expects to be connected to every facet of their lives via their fingertips all of the time.

Consumers also have an expectation that organisations will constantly innovate to keep up with their needs.

While large and data literate companies continue to pioneer new and functional ways to meet the needs of an "on-demand" consumer market, those without the same capabilities may struggle to keep up with expectations.

Looking ahead 

Potential impact

## Technology and connectivity

# Heightened consumer expectations

## Looking ahead

- As pioneering businesses implement advanced technology throughout service delivery, customer expectations increase.
- Personalisation and 'curated choice' become the norm, with consumers expecting a narrow, more relevant, range of options from organisations.
- Consumer experiences, driven by organisations and sectors with more advanced capabilities, will increasingly shape the expectations people have of other sectors and providers.
- Consumers will increasingly want products and services 'on demand' and in ways that fit in with hectic lifestyles.
- Mobile-only expectations will apply to all customer or public facing organisations – small and large, public and private sector.
- As functional aspects of service delivery are continuously optimised, emotional experiences may lag even further behind.
- Consumer demand for unique, 'Instagrammable', personal experiences continues to grow.





## Technology and connectivity

# Heightened consumer expectations



## Potential impact

- The world's increasingly digitalised and consumers will expect this from sport and physical activity.
- Organisations and the workforce will require the tech skills and capabilities to meet consumers where they are and provide relevant user experiences.
- Interactions with technologically advanced businesses will lead to increased expectations of sporting organisations, gyms and other service providers.
- Consumers will increasingly expect businesses to provide tailored and personalised experiences based on data.
- Online booking systems, flexibility in membership and use, and digitally mediated interactions will be required by sports clubs/venues.
- The sector must be vigilant in following and complying with both governance on data standards and with consumer attitudes toward data.
- 'Human premium' may become a differentiating factor (e.g. paying more for in-person guidance/instruction) vs. digital classes.



Technology and connectivity

## Digital leisure



Traditional forms of physical activity are increasingly mediated by technology, with the rise in smartphone ownership and growth of wearable technology meaning more activities can be quantified and analysed.

While digitally mediated leisure has become more accessible, and cheaper – due to the rise in free online exercise programmes – there are also sophisticated products and services with the potential to transform in-home exercise.

With this shift, more individuals than ever before are now capable of receiving some form of instructed guidance.

The sophistication of tools designed to map walking, cycling and running routes is also increasing, with technology and data-driven services further enabling the generation of active travel routes tailored to individual preferences.

E-sports, having grown in popularity and professionalism, are a form of entertainment increasingly vying for people's time and attention.

The rise of digital leisure means providers with traditionally 'analogue' activities face significant competition from equipment or services that can be used in other settings.

Looking ahead



Potential impact



## Technology and connectivity

# Digital leisure



## Looking ahead

- In-home exercise grows in popularity, boosted by consumer experiences during the pandemic.
- In-home exercise options proliferate, from low-tech options like YouTube aerobics or Yoga classes, to high-tech ones like Zwift and Peloton.
- Route-planning technology grows in sophistication, helping consumers to have more enjoyable, safer experiences of active travel.
- Fitness tracking will continue to be popular as a tool for measuring activity and other health indicators, providing opportunities to develop a more sophisticated and holistic view of an individual.
- There will be growing expectations for the fitness industry to integrate with services that digitally mediate or track activity
- Gaming grows as a competitor for people's leisure time, becoming a bigger threat as it increasingly plays a role in how people socialise.
- E-sports grow in popularity, but increased professionalism draws attention to physical and mental health regimes of e-sports players.



## Technology and connectivity

# Digital leisure



## Potential impact

- Individuals are expected to develop more mixed portfolios of in-home/out-of-home exercise by combining gym memberships with free-to-access classes.
- Social element of gyms becomes a defining feature as in-home options both proliferate through digital channels and grow in sophistication through technology.
- Digitally mediated, gamified versions of physical activity could disrupt the landscape, lead to new opportunities to build participation, while also challenging existing providers to adapt.
- The growth in digitally mediated activities to keep people fit and healthy could pose threats to traditional sports.
- Online gaming – alongside other digital media like YouTube or Twitch – increasingly represents competition for children's time.
- Growing popularity of e-sports means it has the potential to displace activity and increase sedentary behaviour, but it could also evolve in ways that helps people realise physical and mental health benefits.





## Community and activity

# Active travel

Utilising human powered forms of transport – whereby people are burning calories rather than fuel – are a key component of active travel policy and considerations around town planning and infrastructure.

Since 2002, people have been making fewer trips and travelling less distance per trip, on average. Despite the average number of bicycle trips staying fairly stable over this time, the average distance travelled per trip by bicycle has increased dramatically.

Walking levels reached a low in 2014 but there's been a rise in the number of trips and time spent walking per person since then.

Growth in active travel can help reduce emissions and inactivity – with walking one of the most accessible ways to be active.

The benefits of active travel – for both health and wellbeing, and wider economic benefits – appear to be well-understood by government, with new plans and investment announced following the active travel boom seen throughout the pandemic.

The emergence of electronic modes of transport – such as e-scooters and e-bikes – represent a potentially disruptive force; with scope to reduce traffic, improve environments and support less active people to move more.

Looking ahead 

Potential impact

A photograph showing a person walking on a paved path on the left and a person cycling on the same path on the right. The path is lined with trees and a white fence in the background. The scene is outdoors and appears to be a park or a dedicated cycling/walking route.

## Community and activity

# Active travel



## Looking ahead

- Active travel will become increasingly significant in how local places and spaces are perceived and accessed.
- Shorter trip lengths and better safety will play a significant role in the perceived feasibility of active travel in people's minds.
- Barriers to active travel will remain more prominent on the demand side, rather than the supply side, and remain more entrenched among audiences with lower uptake.
- Further efforts will be needed to incentivise active travel in ways that focus on powerful drivers of behaviour change, like price, safety, time and health.
- People will become increasingly likely to travel on their own or with family members.
- Cars to remain the dominant form of transport in England.
- Use of new electronic forms of transport – such as e-bikes and e-scooters – continues to rise.
- '15-minute city' concept grows in popularity and could have greater influence over planning decisions.
- Increased government investment leads to improved infrastructure for cycling – but funding for road network continues to dwarf it.



## Community and activity

# Active travel

## Potential impact

- Greater preference for independent forms of travel may see individuals increasingly avoid public transport in favour of cars and lighter forms of transport, like active travel and e-scooters.
- Funding for cycling increases as government aims to create healthier, greener population, but unlikely to create large scale shifts in behaviour on its own due to larger investment into competing travel options (e.g. road network).
- If journeys are still too far, or considered too dangerous, people will continue to use other forms of transport instead.
- Growth of 15-minute concept creates greater opportunity for active design in urban areas, with cycling a key part of the philosophy.
- E-bikes have the potential to make cycling more inclusive and accessible, but e-scooters increasingly threaten to displace more active forms of travel.
- Understanding of what constitutes sport and physical activity should broaden to encapsulate activities that don't require physical facilities, e.g. walking.



## Community and activity

# Place and space



The physical context in which people live – such as their access to local amenities and green spaces, their home and their immediate environment – are becoming increasingly prominent considerations for debates around active lifestyles.

A growing proportion of the UK population will live in urban areas over the course of the next decade, giving further traction to the ‘15-minute city’ urban living concept, where necessities are within 15 minutes on foot or by bike.

The growth in the ‘Internet of Things’ – technologies that allow devices and systems to

connect and exchange data over the internet – will help ‘Smart Cities’ collect and analyse data from smart roads and pavements to understand how active travel is being used.

Access to attractive, quality green spaces will remain vital – with the pandemic further amplifying the importance of parks and outdoor spaces for the physical and mental wellbeing of individuals.

Despite the UK being a green country, there are significant inequalities in the distribution, accessibility and safety of both private and public green spaces for people to enjoy.

Looking ahead



Potential impact



## Community and activity

# Place and space



## Looking ahead

- UK's urban population continues to grow, with 85% of the population living in urban areas by 2030.
- The spatial composition of places will continue to evolve in response to the dislocation experienced due to changes in how and where we work, live and play.
- Neighbourhoods, towns and residential areas are more likely to be inhabited from 9am-5pm, and while this shift may not apply to everyone, it'll change the way people think about and use space.
- The concept of living within 15 minutes of necessities is likely to grow in popularity.
- Importance of parks and other open spaces people can enjoy is likely to grow, driven by the context and experiences of the pandemic.
- It'll also be the quality of these spaces, not the quantity, that'll be a more significant driver in attracting people to use them.
- The presence of 'good places' and accessible routes between them will also be increasingly important to the growth of active forms of travel.

## Community and activity

# Place and space



## Potential impact

- Changes in where people are located may give people more time to be active as they spend less time commuting, but it would also remove many incidental journeys they used to make.
- Shifts in how we understand and use places will alter where people are active and could create opportunities to strengthen communities.
- City centre venues reliant on high levels of footfall from central business hubs or districts may struggle, as more people work from home more often.
- Where individuals choose to live may shift as the importance of green space, whether in the form of parks or rural areas, increases.
- Increased clustering could place increasing pressure on parks and green spaces, which may be further threatened by policies to meet the growing housing need.
- Increased collection and analysis of data from sensors and processors in cities will allow for greater monitoring and understanding of how active transport is being used.



## Community and activity

# Cohesive communities

The social fabric and institutions underpinning the places where people live are becoming an increasingly important context when considering engagement with physical activity.

Participation in physical activity can help improve community cohesion and people's sense of belonging – and greater community cohesion can, in turn, boost participation levels.

However, some characteristics of community cohesion appear to be in decline – such as group membership, time socialising with family and issues around loneliness. Developed economic societies have reduced the need for people to rely on others to get by, leading to more individualistic practices.

The last decade has also seen a reduction in council operated community services and local authority spending on culture and leisure services due to austerity measures. Council budgets for largely discretionary services are likely to remain under significant pressure.

The economic adversity and disproportionate effects of the pandemic may also exacerbate existing social divides and create new disparities, both within and between local areas.

In contrast, recent events may be a catalyst for stronger community ties – with changing priorities and working practices potentially leading to people spending more time and effort in their local communities.

Looking ahead 

Potential impact





Community and activity

# Cohesive communities



## Looking ahead

- Economic hardship, coupled with growing inequality and demographic trends, will place increasing pressure on the social fabric and cohesion of communities.
- Growing public health challenges and recessionary pressures are likely to drive up demand for charitable and public services.
- Budgets for spending on local services will remain under huge pressure due to gaps in council finances.
- Failure of businesses due to economic adversity and government cuts could see an increase in number of 'community assets'.
- Community cohesion and sense of belonging in Britain may decline further amid the context of 'culture war'.
- And yet, communities may be brought together following boosts to neighbourliness prompted by the pandemic.
- Life becomes individualised with more people living alone and self-reliant.
- Charitable giving – both in terms of people's time and money – is likely to decline as consumers feel the economic pinch.





Community and activity

# Cohesive communities



## Potential impact

- Increased individualised living and proliferation of in-home exercise could see the social aspect of gyms in attracting consumers grow significantly.
- The rallying effect of coronavirus on local communities represents an asset which could be harnessed to boost sport and physical activity.
- Sport's capability to drive community cohesion could see greater emphasis placed on sport and physical activity by policymakers.
- Increase in community assets could see the landscape of exercise venues shift if private businesses fail and community run ones emerge.
- Decline in charitable giving could threaten existing sports clubs and organisations, while reducing charities' ability to help.
- More individualised living could lead to increased demand for community-run organisations.



## Use the trends to inform your...

**1**

### **Strategic decision making**

This foresight into long-term trends can be used to support strategic planning. Examples of how to use include; using the trends to inform a SWOT/implications analysis, or a stop/start/continue process.

---

**2**

### **Conversations with partners**

This foresight into long-term trends can be used to inform conversations you're having with partners about their own strategic planning.

---

**3**

### **Further futures work**

This foresight can provide a foundation to enable further futures thinking or techniques, such as scenario planning or exploring relevant trends in greater depth by gathering more intelligence or looking at other signals of change.



## Resources to help you...

### About this document

Providing foresight on the macro trends that will impact sport and physical activity to 2031 and beyond, this document explores the implications for the sector, helping us identify and understand future strategic issues, and support the strategic thinking and decision-making that will make us more resilient to changes in the environment we operate in.

This resource was created by Sport England and [Trajectory](#) to support the development of Uniting the Movement, Sport England's 10-year strategy.

The six-stage process included extensive stakeholder engagement, trends analysis and the development of implications for the most significant trends; helping us understand the challenges and opportunities ahead to ensure we're fit to face the future.

Implications template

Government: Futures thinking  
and foresight guide

Sources



**For more information please contact:**  
[research@SportEngland.org](mailto:research@SportEngland.org)