

UNDERSTANDING GREATER LINCOLNSHIRE'S SPORT, PHYSICAL ACTIVITY and LEISURE SECTOR

Executive Summary

This document summarises the results of a 5-month study into the Sport, Physical Activity, and Leisure Sector of Greater Lincolnshire and Rutland. The full report will be made available by Active Lincolnshire in due course on their website. The data used in this report was gathered through a combination of desktop research, survey, open interviews, and group discussions, and represents the views of over 100 organisations from the Greater Lincolnshire and Rutland area.

The aim of this report was to answer the following questions:

1. What is the current and potential economic impact of the sport, physical activity, and leisure sector of Greater Lincolnshire and Rutland?
2. What are the current and future demographic trends that will impact the sport, physical activity, and leisure sector of Greater Lincolnshire and Rutland?
3. What are the current and future trends that will impact provision in the sport, physical activity, and leisure sector of Greater Lincolnshire and Rutland?
4. What are the skills gaps and development opportunities to develop a resilient and skilled workforce of the sport, physical activity, and leisure sector of Greater Lincolnshire and Rutland?
5. What are the impacts of COVID-19 and the Cost-of-Living Crisis on the sport, physical activity, and leisure sector of Greater Lincolnshire and Rutland?

Following the gathering and analysis of data for this project, it was found that:

- The sector has a combined GVA of approximately £788 million, which could grow up to £804 million over the next four quarters if current productivity trends are maintained. A lot of that value comes from small providers, including charitable organisations and community interest companies. There were over 1,200 companies in Greater Lincolnshire and Rutland providing services in the sport, physical activity, and leisure sector in June 2022. Many such companies need support, both financial and non-financial, but because of their size they tend to be ineligible for most aid schemes. More support needs to be directed towards these companies now.
- Voluntary organisations are a valuable, but rarely discussed aspect of the sector. In 2022, there were 1,218 charities, trusts, and community interest companies providing support in the sport, physical activity, and leisure sector, with a combined reported income of £330 million, as well as 19 societies, mutuals, and

other co-operatives, with a combined income reported of £3 million in their last financial year.

- There are many current and future demographic trends that will impact on the sport, physical activity, and leisure sector of Greater Lincolnshire and Rutland, but the most significant ones are: aging populations, decline of young people, and an overall projected population growth. There are specific concerns that providers should take into consideration when supporting defined groups: women and girls, religious and ethnic minorities, people with mental health difficulties, people living with multiple and complex needs, and LGBTQ+ people. However, different populations should be consulted to better understand their needs.
- There are many opportunities for the sector: digital rollout, 'atypical' active leisure, collaborating with the health sector to deliver effective intervention, early provision, and activities in community venues. For the providers to take advantage of those opportunities, however, it is important to address the challenges to provision: the confidence and self-efficacy of citizens, lack of coordination around providers, insufficient funding to go around, and the lack of accessibility, which pose the highest barriers to entry.
- Approximately 28,000 people are employed in the sector. There is a significant demand for digital skills, mental health first aid, multi-skilled development, and elite skills in coaching. There is also a significant demand for professional skills in volunteering. There are many factors that drive the current skills gap found in the sector, however, and there is a need for a system change to address it.
- COVID-19 had a significant impact on the sector, but the ones that will impact individuals, providers, and workers will be the effects of the cost-of-living crisis. While providers are recovering from the impacts of COVID-19, the consequences of the cost-of-living crisis will likely be felt across the sector for a long time.

Over the course of this research, it was found that the sector has tremendous economic and social potential, but is faced with many significant and overlapping challenges:

- Recruitment and retention of both salaried employees and volunteers are a major issue for all providers.
- Small providers and community interest companies offer great value for money and great value for the community but are frequently locked out of funding calls and nonfinancial support.
- For many workers – particularly women and early career workers – the costs of fuel and childcare are creating conditions where they cannot afford to work.
- Provision for distinct groups is limited.
- Elite coaching is not as available as it could be.
- Cost of utilities and fuel is closing many providers and causing others to re-evaluate the services they are offering.

- The sector needs better training for workers, and more diverse skills, for both salaried employees and volunteers.
- Mental health first aid is going to be as important as physical first aid for the sector.

With the findings of this report in mind, the following recommendations are put forward:

- Increase investment in small providers, particularly community providers. This investment can be both through grants (direct funding) and through the provision of business support (indirect funding) which would increase their resilience and help them introduce new programs to their local communities.
- Increase support for early careers in the sector, through investment in training, education, salaries, and long-term career planning.
- Increase support for volunteers and employees in the sector by reducing the cost of work (provision of childcare, elderly care, travel vouchers, and more).
- Increase support for programmes aimed at distinct groups (under-served communities, women and girls, religious minorities, people living with disabilities, people living with mental health conditions, and more).
- Increase economic support for providers to help them deal with the rising costs of utilities.
- Increase support for programmes encouraging volunteering in the sector (through corporate and community projects).
- Emphasise the value of volunteering to employers.
- Provide support for multi-skilled training.
- Provide support for bringing more elite coaches into the county.
- Create a Business Assessment Toolkit to help providers identify and address the growth inhibitors for their individual company and signpost these businesses to helpful resources.