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

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Summary of Findings

- This report shows the results of a 5-month study into the Sport, Physical Activity, and Leisure Sector of Greater Lincolnshire and Rutland. Data was gathered through a combination of desktop research, survey, open interviews, and group discussions, and represents the views of over 100 organisations from the region.
- There were over 1,200 companies in Greater Lincolnshire and Rutland providing services in the sport, physical activity, and leisure sector in June 2022.
- Those companies had an estimated combined turnover of £453 million and employed an estimated 28,000 people.
- There were also 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.
- The sector has tremendous productivity, both economic and social, with a combined GVA of £788 million which could grow up to £804 million over the next four quarters if current productivity trends are maintained.
- Populations projections show that the Greater Lincolnshire LEP area and Lincolnshire are projected to experience a steady increase in population over the next 20 years.
- There is growing number of people of pensionable ages, and a declining number of children in the UK which will have an impact on the service provision for the sector.
- There are significant opportunities for future provision of sport, physical activity, and leisure in Greater Lincolnshire and Rutland, particularly as part of a wider health strategy, a strategy for early provision, and provision of atypical active leisure. Small provider and community venues held a huge untapped potential for future growth and investment.
- Challenges for future provision included: challenges in increasing citizens' confidence and self-efficacy, challenges in increasing citizens' access to activities, challenges of funding for providers, and challenges of increasing coordination between businesses and policy-makers. There were also significant gaps in provision found for specific groups of citizens, particularly for cultural and religious minorities, and for those living with mental health conditions.
- Recruitment and retention were a serious challenge for the sector, with demand being driven by a shortage of skilled workers, a shortage of training, and a shortage of support for early career workers.
- Skills in demand included: digital skills, mental health first aid, specialist skills for working with different groups of clients, elite coaching, and more.
- A huge demand was noted for volunteers with professional skills.
- Motivation and morale were found to be a challenge for both salaried employees and volunteers.
- COVID-19 and the Cost-of-Living Crisis were found to have profound impacts on the sector, both positive and negative.
- Participants called for bold and innovative thinking to help the sector regenerate and grow.

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Introduction

This report has been prepared for Active Lincolnshire, Active Humber, and Active Together(the GL Active Partnership Network) by the Lincolnshire Open Research and Innovation Centre (LORIC) at Bishop Grosseteste University. The aim of this report has been to provide an overview and exploration of Greater Lincolnshire and Rutland's Sport, Physical Activity and Leisure Sector, in order to help The GL Active Partnership Network identify future trends in demographics and growth, stimulate sector development, and provide support to new and innovative interventions that help more people get active.

The aim of this report is to explore 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?

Each chapter of this report will be dedicated to one of these questions.

The report will end with a summary of the main findings and recommendations, broken down by stakeholder group: for individuals, for businesses, for charities, and for governing bodies.

Disclaimer:

This report contains open data made available under an Open Government Licence 3.0.

This report has been part-funded by Active Lincolnshire and supported by Research England.

This report has been produced for Active Lincolnshire and their partners by the Lincolnshire Open Research and Innovation Centre. The purpose of this market report is to support Active Lincolnshire and their partners with service development decisions, investment decisions, and funding applications.

The findings in this report are advisory only, and represent the researchers' interpretation of available data. The reader is not obligated to take on any of the recommendations laid out in this report, in part or in full, and is responsible for doing their own due diligence before implementing the findings in any way, shape, or form.

Terminology

There is some overlap between key terms that can lead to some challenges in understanding the full extent of the remit of this project. Working definitions used throughout this research project are shown below, with the caveat that some of those definitions may have been applied differently by different providers included in this research project.

Sport: "All forms of physical activity which, through casual or organised participation, aim at expressing or improving physical fitness and mental well-being, forming social relationships or obtaining results in competition at all levels."[1]

Physical activity: "Any bodily movement produced by skeletal muscles that requires energy expenditure."[2]

Leisure / Active Leisure: "Leisure time physical activity undertaken outside of structured, competition sport."[3]

Survey respondents: Research participants who took part in the survey run by LORIC between May 2022 and October 2022.

Interview participants / Interviewees: Research participants who took part in the semi-structured interviews run by LORIC between May 2022 and October 2022.

Providers: Public sector organisations, private sector organisations, and third sector organisations that provide services within the sport, physical activity, and leisure sector of Greater Lincolnshire and Rutland, or providing services and products that relate to the sector.

Citizens / clients / beneficiaries: Individuals of all ages within Greater Lincolnshire and Rutland who engage in or benefit from the products and services that providers in the sport, physical activity, and leisure sector offer.

Activity Levels: Measures used by Sport England to assess the levels of physical activity undertaken by adults in an average week. Depending on how much moderate or vigorous physical activity an adult undertakes in an average week, they are classified as active, fairly active, or inactive.

Moderate Physical Activity: In the context of the Active Lives Survey, this is defined as "activity where you raise your breathing rate".[4]

Vigorous Physical Activity: In the context of the Active Lives Survey, this is defined as and activity where "you are out of breath or sweating."

[1] Council of Europe RECOMMENDATION No. R (92) 13 REV OF THE COMMITTEE OF MINISTERS TO MEMBER STATES ON THE REVISED EUROPEAN SPORTS CHARTER https://search.coe.int/cm/Pages/result_details.aspx?ObjectID=09000016804c9dbb
[2] Physical activity (who.int)
[3] Active recreation - Sport and Recreation Victoria
[4] Active Lives | Sport England

Methodology

This research project used mixed methods in order to produce its findings. Data collection took place between May 2022 and October 2022, and was carried out in several ways.

First, the research team conducted desktop-based research, using open and secondary data sources to map out what information was already available and what information still needed to be collected.

Second, the research team collected primary data using a combination of quantitative surveys and qualitative interviews. The surveys and interviews were used to fill in the gaps that the open and secondary sources could not answer, such as the skills currently in demand and the impact that COVID-19 has had on the sector. The survey questions and the interview schedule are available in appendices D and E.

The survey ran between 17/07/2022 and 30/09/2022 and had 71 respondents. It was distributed via email and via social media to over 1500 people. Responses came from predominately small and micro business, the majority of which were also charities or Community Interest Companies (CICs). Of the respondents who reported the geographic location of their company, the majority came from Rutland, North Kesteven, Lincoln City, and North East Lincolnshire. Boston and Skegness, West Lindsey, East Lindsey, South Kesteven and South Holland had fewer respondents. No respondents reported having their organisations in North Lincolnshire.

The interviews were conducted between June 2022 and October 2022. There were a total of 20 participants who took part in the interviews, either as a group or one to one. Participants came both from for-profit and non-profit backgrounds, and represented 14 companies that operate within Greater Lincolnshire and Rutland.

Intermediate findings were presented at the Active Lincolnshire Tackling Inequalities in Physical Activity and Sport event on the 12th of September 2022. Additional feedback was collected from stakeholders on the day. There were 20 participants in the session, representing local government, private industry, non-profit companies, and education establishments taking part.

1. Chapter One: The current and potential economic impact, GVA and productivity of the sport, physical activity, and leisure sector

1.1 Section Headlines

This section of the report illustrates economic impact through standard means – Gross Value Added (GVA), turnover, employability, productivity, and sizes of business – but will also examine other markers of impact, such as potential social return on investment and likelihood of future economic growth.

According to open data made available by the UK government and the Office of National Statistics (ONS), there were over 1,200 companies in Greater Lincolnshire and Rutland providing services in the sport, physical activity, and leisure sector in June 2022. Those companies had an estimated combined turnover of £453 million and employed an estimated 28,000 people. There were also a further 1,218 charities, trusts, and community interest companies providing support in the sport, physical activity, and leisure sector, with an estimated combined income of £330 million, as well as 19 societies, mutuals, and other co-operatives, with an estimated income of £3 million in their last financial year.

The sector has tremendous productivity, both economic and social, with a combined GVA of £788 million, which could grow up to £804 million over the next four quarters if current productivity trends are maintained.

1.2 About Greater Lincolnshire and Rutland

Greater Lincolnshire and Rutland includes the councils of Lincoln City, West and East Lindsey, North and South Kesteven, South Holland, Boston, North East Lincolnshire, North Lincolnshire, and Rutland. It covers an area of approximately 7,341 km^2 and has a combined estimated population of 1,138,900 (as reported on Nomis[5], from 2020).

It is a geographically vast area, which combines urban, rural, and coastal regions, each of which has its own characteristics. As a region, Greater Lincolnshire and Rutland has some of the most and least deprived wards in England as per the Indices of Multiple Deprivation. It is an environment that both offers excellent conditions for the sport, physical activity, and leisure sector, but it is also one where opportunities to access sport, physical activity, and leisure are extremely uneven.

[5] https://www.nomisweb.co.uk/reports/lmp/lep/1925185595/report.aspx#tabrespop

1.3 Defining Greater Lincolnshire and Rutland's Sport, Physical Activity and Leisure Sector

Greater Lincolnshire and Rutland's Sport, Physical Activity, and Leisure sector encompasses both formal and informal provision of sport activities, physical activities, and active leisure. As defined by Active Lincolnshire, the sector includes:

- Local authority leisure operators
- Community and voluntary organisations
- Physical activity providers and coaches (i.e. yoga, Zumba instructors etc.)
- Coaching Agencies
- Football foundations
- Private sector operators; gyms, activity providers
- Grassroots sports
- Facilities and venues
- Adventure sport and outdoor activities, including water sports, cycling, and walking
- Events
- Elite sports clubs
- Private sector manufactures of sporting goods and equipment
- Physiotherapists, sports massage, and other physical health professionals
- Social Prescribing Link Workers
- Commissioned services utilising physical activity e.g. One You Lincolnshire programmes.

However, the reach and influence of the sector goes far beyond the organisations that operate directly in sport, physical activity, and leisure. The extended stakeholders of the sector include organisations in healthcare, education, manufacturing, tourism and the visitor economy, and more.

In management literature, stakeholders are defined as groups without whose support an organisation would cease to exist[6]. In the case of the Sport, Physical Activity, and Leisure Sector of Greater Lincolnshire and Rutland, this includes:

- Individuals engaged in the Sport, Physical Activity, and Leisure Sector as service users.
- Individuals engaged in the Sport, Physical Activity, and Leisure Sector as volunteers.
- Individuals engaged in the Sport, Physical Activity, and Leisure Sector as employees of companies.
- For-profit organisations that operate in the Sport, Physical Activity, and Leisure Sector. (e.g gyms, swimming pools, leisure centres, climbing walls.)
- Sole traders that operate in the Sport, Physical Activity, and Leisure Sector. (e.g. personal trainers, occupational therapists, coaches.)
- Charities, Community Interest Companies (CICs), Registered Societies, and Non-Government Organisations (NGOs) that operate in the Sport, Physical Activity, and Leisure Sector. Those could include umbrella organisations, organisations providing physical spaces, organisations providing human resources, and more.

[6] 1963 internal memorandum at the Stanford Research Institute

- Financial stakeholders, such as investors (for for-profit organisations), trustees and donors (for charities), as well as government funds (e.g. the Levelling Up Fund, Shared Prosperity Fund, Community Recovery Fund.)
- Non-financial stakeholders, such as county councils, city councils, and parish councils.
- Indirect stakeholders such as the NHS, schools, children's centres, social care providers and community/neighbourhood groups, who benefit from the Sport, Physical Activity, and Leisure Sector even if they don't engage with it through a specific programme or initiative.

It is important to understand the value drivers of each stakeholder group, what they needs, what tasks they are looking to fulfil, and the added value that they seek from engaging with the Sport, Physical Activity, and Leisure Sector, as these relationships can impact strategic provision considerably. It is also important to be aware of the intended and unintended consequences that might arise for different stakeholders as those decisions often drive decision-making.

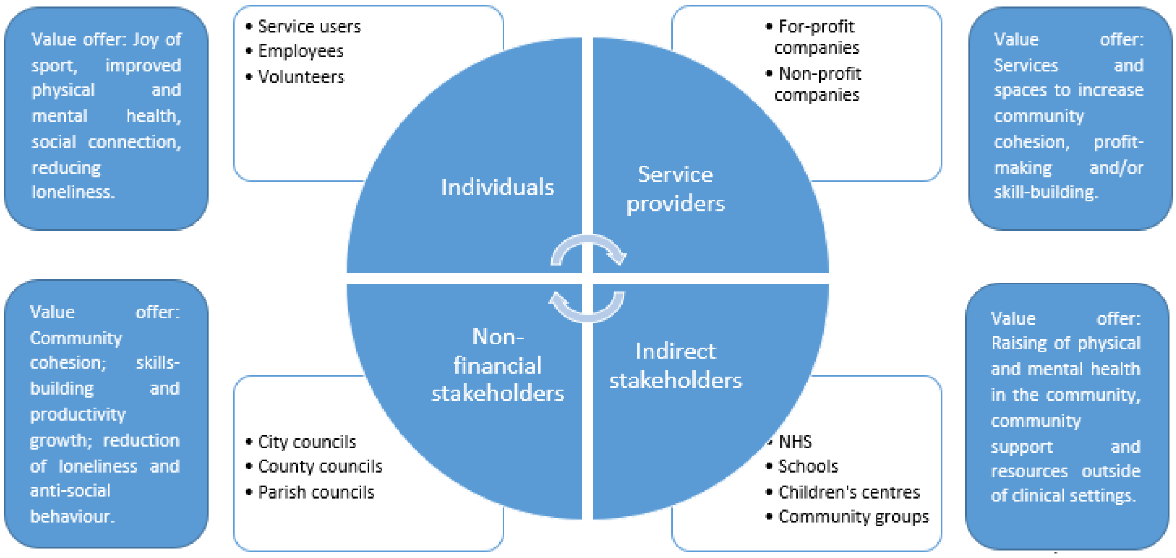


Figure 1: Stakeholder map of the Sport, Physical Activity, and Leisure Sector of Greater Lincolnshire and Rutland

By far, the biggest unifying value of the Sport, Physical Activity and Leisure Sector is the ability of services and organisations to increase community cohesion, reduce loneliness, and create resources for people to improve their physical and mental health in addition to what is available in clinical settings. This will be important later in this section when we examine the size and productivity of the sector.

1.4 Sector Participants

1.4.1 Registered Companies and Sole Traders

Based on data from Companies House (Summer 2022) there are 1,281 registered companies in the Greater Lincolnshire and Rutland catchment area (based on postcode and standard industrial classification (SIC) codes) that provide services in the sport, physical activity and leisure sector. Of those companies, 1164 were registered as Active and did not submit Dormant Company accounts.

Additional statistics on that dataset include:

- 22 companies submitted full accounts.
- 7 companies submitted group accounts.
- 20 submitted accounts as small companies, meaning they had fewer than 50 full-time employees, their balance sheet total did not exceed £5.1 million, and/or they had a turnover of less than £10.2 million.
- 401 submitted micro entity accounts, meaning they had less than 10 employees, their balance sheet total did not exceed £316,000, and/or their turnover did not exceed £632,000.
- 90 companies were registered as dormant.
- 26 companies submitted unaudited abridged accounts.
- 341 submitted total exemption full accounts.
- 345 submitted no accounts.
- 73 had been incorporated in 2022 (at the time of the data download), with a further 183 incorporated in 2021 and 140 incorporated in 2020.

The above statistics do not include any nation-wide providers. Nor do they include companies that misfiled or entered the wrong SIC code.

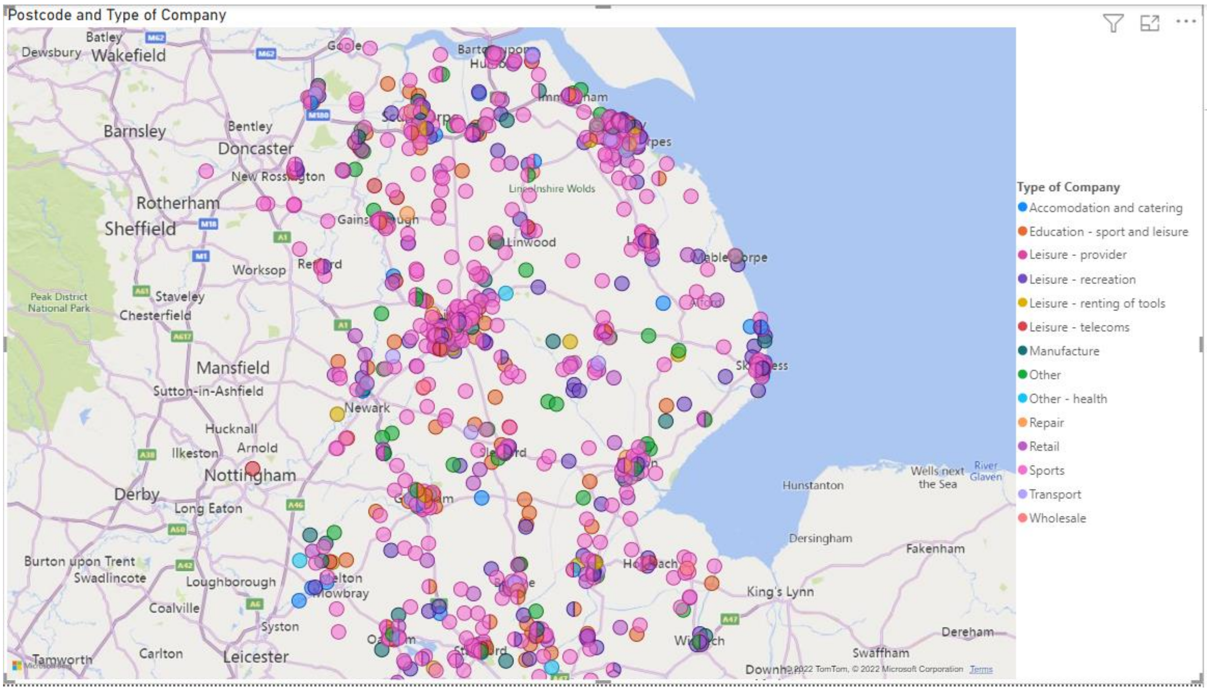


Figure 2: Distributions of for-profit companies in the region

Of the companies that submitted micro company accounts, not all were sole traders; however, it is reasonable to assume that many of them are. This includes coaches, personal trainers, occupational therapists, and other individuals who work on a freelance basis. However, that is likely not an exhaustive list and does not include coaches who work on a part-time basis and coaches who file self-assessment accounts with HMRC instead of company accounts.

The oldest incorporated companies were Lincoln City Football Club (1895) and The Grimsby Town Football Club (1891). Other long-standing companies in the sector (pre-1950s) include but are not limited to:

- The Boston Bowling Club
- Boston United Football Club
- Boston West End Bowling Club
- The Cleethorpes Bowling Club
- Grantham Town Football Club
- Lincoln City Football Club
- Lindum Sports Association
- Scunthorpe United Football Club
- Seacroft Golf Links Company
- Stamford Association Football Club
- The Grimsby Town Football Club
- The Welholme Lawn Tennis Club
- Wisbech Town Football Club
- Peterborough Milton Golf Club

The 2020-2022 period saw the incorporation of many new companies, although it is not clear whether this represents an unusual trend for the sector. An examination of the number of companies by incorporation date shows that decade-to-decade changes in the number of long-running companies even out after time. Nevertheless, the period of 2020-2022 appears to show a significant growth trend for the sector, which suggest many new entrants to the sector.

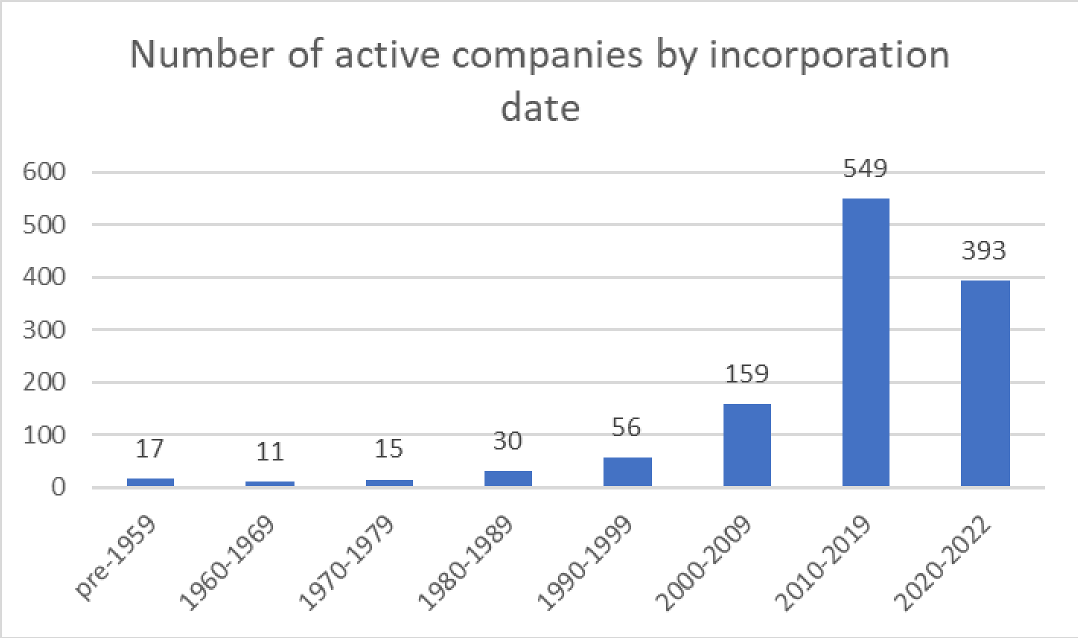


Figure 3: Decade-to-decade comparison of active companies by incorporation date

Turnover and employment data are difficult to access. Of the companies that filed full accounts, only some disclosed their turnover in their last financial year (ending 2021 or 2022, depending on when the company submits its accounts), and even less reported on their employment numbers. However, ONS data from the Annual Population Survey provides some additional information.

In the twelve-month period ending December 2021, a total of 7400 people were employed in Culture, Media, and Sports Occupations in Greater Lincolnshire and Rutland, and a further 8300 employed in Leisure, Travel and Related Personal Service Occupations. This, of course, does not include people employed in managerial, skilled, or administrative roles, but data pertaining to "Other Industries" suggests there are approximately 28,000 people employed across the sector[7] and across all occupations.

Of the companies identified in Greater Lincolnshire and Rutland, 36 reported their turnover in their filings, to a combined turnover of £100,601,714.43 in the last recorded financial year. This is, however, a very small sample size compared to the overall number of companies in the sector.

Data released by the UK government shows that the average turnovers of businesses outside of London break down as follows[8]:

Business type	Average Turnover
No employees	£72,461.00
1 - 9 employees	£548,027.00
10 - 49 employees	£3,086,597.00
50 - 249 employees	£20,228,523.00

[7] Annual Population Survey, Workplace Analysis: Employment by occupation sub-major group. Includes all employed in: arts, entertainment and recreation; other service activities; activities of households as employers; and undifferentiated goods and services producing activities of households for own use, and activities of extraterritorial organisations and bodies.

[8] https://www.gov.uk/government/statistics/business-population-estimates-2021/business-population-estimates-for-the-uk-and-regions-2021-statistical-release-html#:~:text=total%20employment%20in%20SMEs%20was,%C2%A30.7%20trillion%20(16%25)

Using that data and what has already been made available, we can estimate that for-profit businesses registered in Greater Lincolnshire and Rutland and Rutland have an estimated combined turnover of £453,881,214.43 in their last financial year.

1.4.2 Registered Charities

There were 1,218 charities registered in Greater Lincolnshire and Rutland as providing amateur sports activities, recreation activities, or activities dedicated to the "advancement of health or saving of lives". Those charities had a combined income in their last recorded filings of £330,794,681.00.

Of those 1,218 charities, their primary reported activities broke down as follows:

- 6 were acting solely as umbrella or resource bodies
- 189 make grants to individuals
- 97 make grants to organisations
- 38 provide other charitable activities
- 14 provide advocacy, advice, and information
- 507 provide buildings, facilities, or open space
- 200 provide human resources
- 29 provide other finance
- 136 provide services
- 1 sponsors or undertakes research

Over a half of all charities recorded more than one activity, meaning an entity could act as an umbrella or resource body, provide grants, and provide human resources. Only 539 charities in the Greater Lincolnshire and Rutland area reported only one activity, with over half of those being the provision of buildings, facilities, or open spaces.

Once all charitable activities were accounted for (i.e. primary, secondary, tertiary), it appears that most charities that operate in the sport, physical activities, and leisure sector do so through the provision of buildings, facilities, or open space (27% of all activities) followed by the provision of services (18%), advocacy, advice and information (12%) and human resources (11%). Further breakdown of those statistics can be seen below:

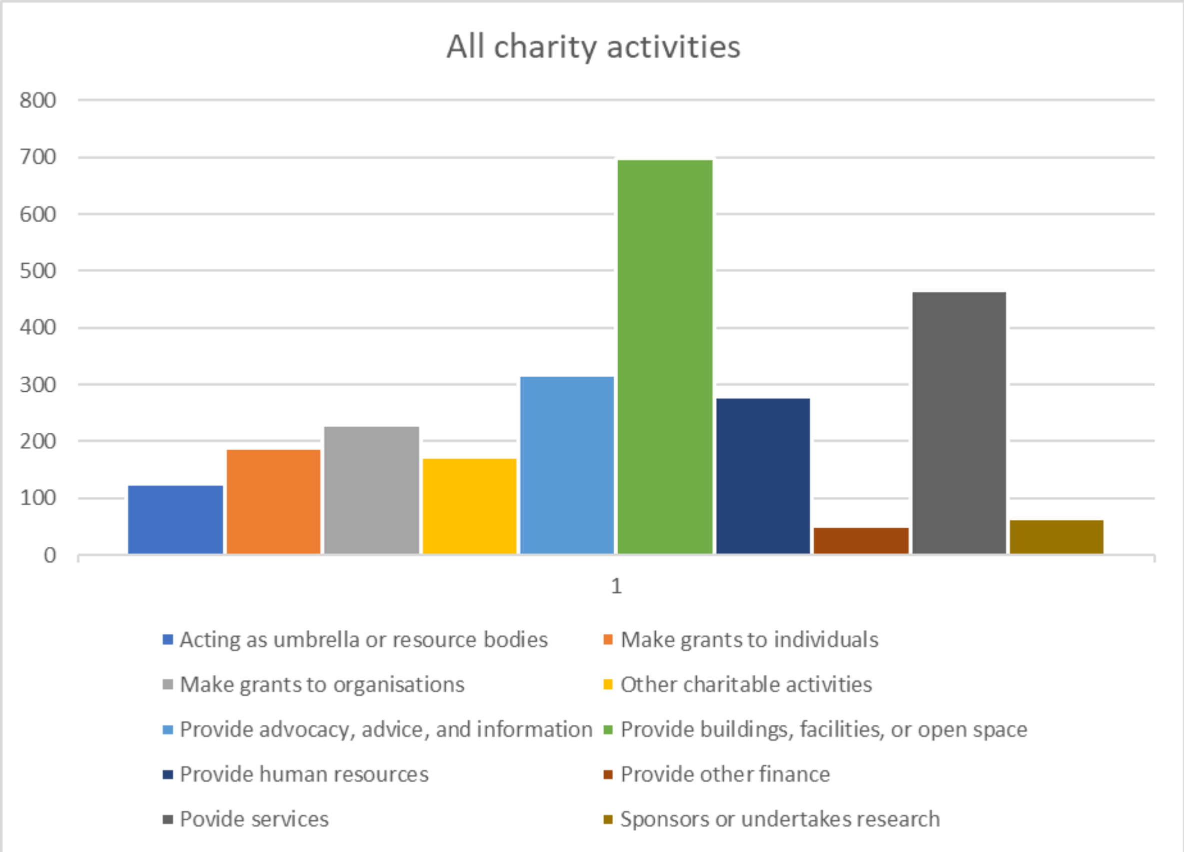


Figure 4: Charity Activities in Greater Lincolnshire and Rutland

In terms of aims and objectives of charities, most of the ones operating in the sport, physical activity, and leisure sector do so through the running of amateur sport teams, the provision of education and training, and the advancement of health and saving of lives. As with charity activities, most if not all organisations had more than one aim, and listed up to 14 different things which the charity does:

Types of charity aims	**Total**
Accommodation/housing	58
Amateur Sport	681
Armed Forces/emergency Service Efficiency	14
Arts/culture/heritage/science	349
Disability	292
Economic/community Development/employment	281
Education/training	609
Environment/conservation/heritage	209
General Charitable Purposes / Other Charitable Purposes	639
Recreation	428
Religious Activities	111
The Advancement Of Health Or Saving Of Lives	480
The Prevention Or Relief Of Poverty	210
Animals	55
Overseas Aid/Famine Relief	50
Human Rights/religious Or Racial Harmony/equality Or Diversity	39

Of those, the ones listing "religious activities" under their primary aim tended to be church halls and trusts that also operated in the arts/culture/heritage/science sphere and the amateur sport sphere. They mostly tended to provide buildings and grants to others.

Likewise, providers that listed "the prevention or relief of poverty," "environment/ conservation/ heritage" or "accommodation/ housing" as their primary charitable activity tended to do so though the provision of buildings and spaces.

Meanwhile, organisations that listed "amateur sport" as their primary activity tended to also list "recreation", "economic/ community/ employment development" and "environment/ conservation/ heritage" as their secondary aims and purposes. Most of these charities helped through the provision of buildings/facilities/open space, but also through the provision of grants, provision of advice, and provision of human resources.

On a similar note, organisations that listed "recreation" as their primary aim tended to deliver that through the provision of buildings, facilities and open spaces. Those organisations were less likely to provide other activities or grants and tended to be village halls and memorial trusts.

Organisations that listed disability, or the advancement of health or saving of lives as one of their primary aims, tended to operate through the provision of grants, services, or human resources. Those activities were further described as the redistribution of funds, activities aimed at aiding the healing and relief and rehabilitation of sick or wounded persons, the promotion of positive health, helping the sick of the parish, helping the activities of hospitals and rehabilitation centres, the support of people with mental health problems, and more.

The latter group of organisations are less directly related to the sport, physical activity, and leisure sector, but their activities overlap with those of private providers and are frequently needed for the purposes of reaching populations that are in poor physical and mental health, and populations that might not otherwise engage with sports, leisure, or physical activity.

Likewise, organisations that listed education and training as their primary aim tended to offer amateur sport and recreation as a secondary and tertiary aim. While they were not all directly involved in the sport, physical activity, and leisure sector, many are crucial for the development of community groups and the engagement of populations that might otherwise not engage in physical activity (such as the elderly and people with multiple and complex needs.) Examples of activities cited include:

- *"Wellbeing Service/IAPT/Counselling/Mental Health Training/Home and Community Support Service."*
- *"Involving the Sea Cadets in vocational projects, marine experience in small boats, and encouraging them to attend courses offered by the Royal Navy."*
- *"Gay & Peter Hartley's Hillards Trust makes grants to charities that support children's welfare, care for the elderly, mental/physical health, disability, & hospices. Grants are made up to £1,000 to local charities in towns in 11 counties in north and central England - mainly in Yorkshire, Lancashire, Lincolnshire, Derbyshire & Nottinghamshire. "*

- *"The hall is hired out to local community groups and acts as a base for their activities. In addition, the managing trustees from time to time run fund raising activities to supplement income from hirings."*
- *"Market Overton Village Hall provides a base for the local community, regular users include Free Church, Sewing Classes, Yoga, Art Class, Slimming World, Snooker Club & Cottesmore Village Players. Also a venue for village functions & private parties."*
- *"Working within the community and voluntary sector within the Humber area to assist organisations to improve, protect and procure recreation facilities"*
- *"Girlguiding Rutland is part of the worldwide association of girl guides. The aim of guiding is to help girls and young women develop emotionally, mentally, physically and spiritually so they can make a positive contribution to their community and the wider world."*
- *"Youth and Community Centre with Sports Hall with facilities such as badminton, squash, indoor football, basketball, community and arts facilities including conference and celebration activities particularly in support of community voluntary youth work."*

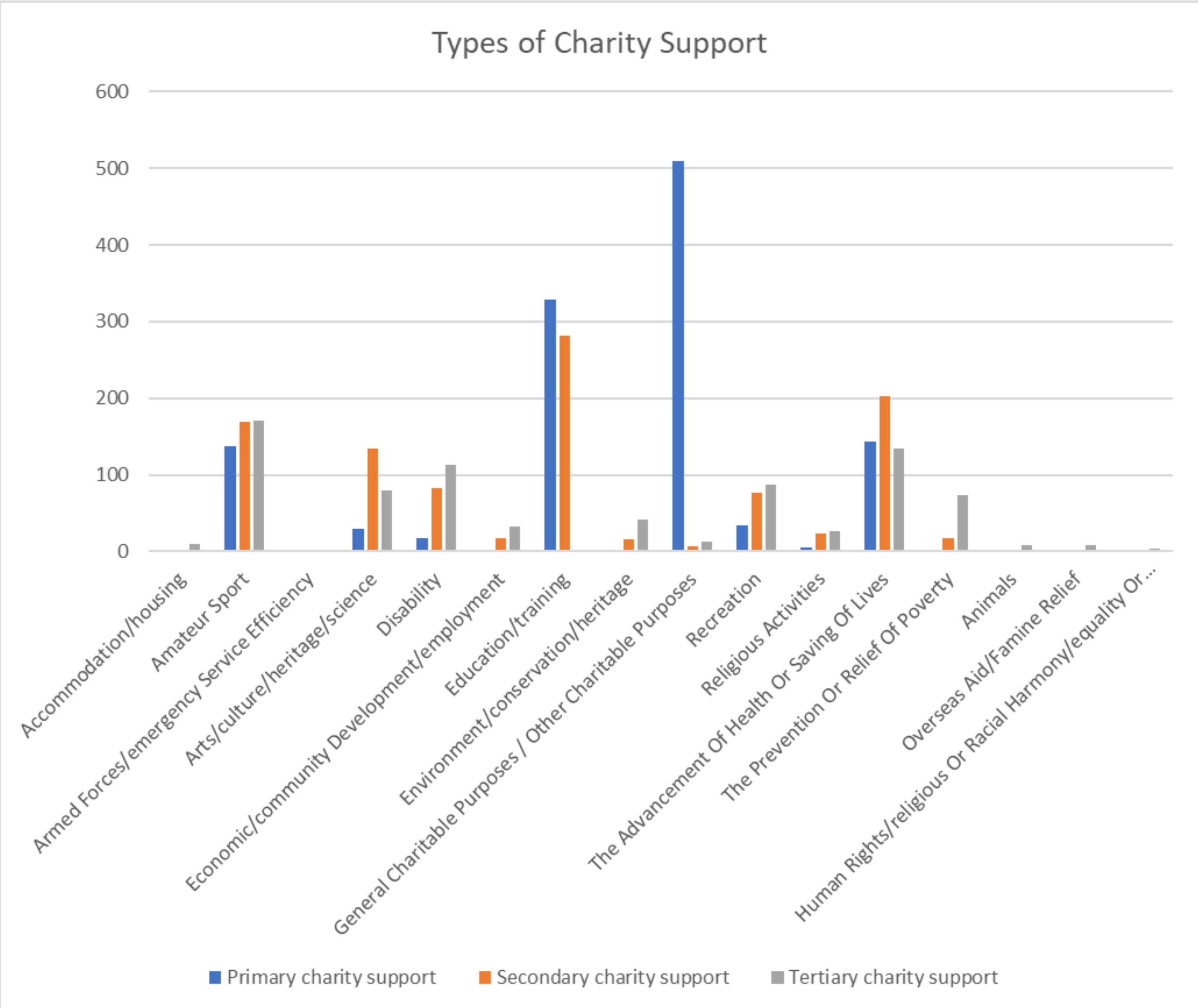


Figure 5: Types of Charity Support

When examining the beneficiaries of all these charities, the biggest groups are children and young people, the elderly, and people with disabilities.

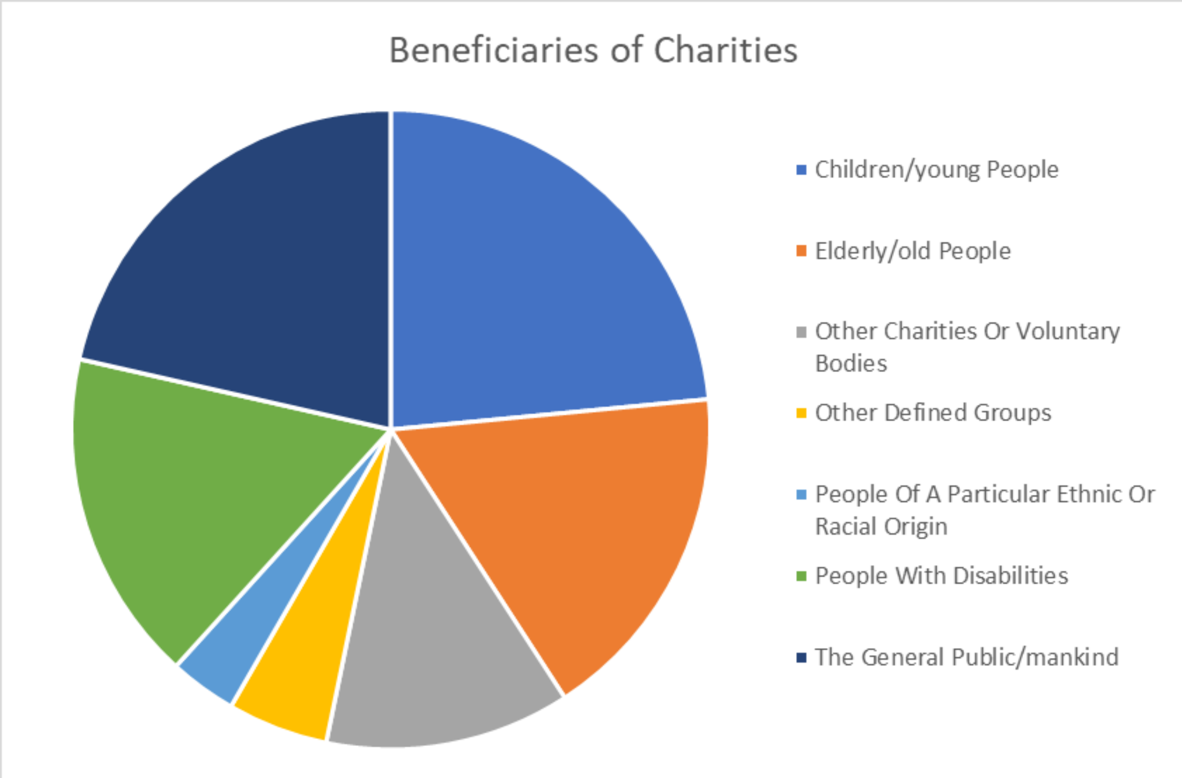


Figure 6: Beneficiaries of Charities

Of the charities, 49 included groups dedicated to the support of people of a particular ethnic or racial origin, or other defined groups. Some of those organisations were providing support for a specific parish or village; others offer women's only groups or support for family carers. Other activities included:

- Activities to support refugees;
- Activities to support those living with cancer;
- Activities to aid in the rest and convalescence of patients;
- Activities to support those who "have need because of age, infirmity, ill health or poverty";
- Activities to promote the "spiritual, moral and physical wellbeing of all seafarers, their families and dependants";
- Activities to support recently bereaved parents;

It appears that organisations are set up to tend to local needs, and provide a variety of support and activities, many of which intersect with the sport, physical activity, and leisure sector. This is further supported by the geographical distribution of these organisations, with many charities providing spaces for sports and community activities evenly dispersed throughout Greater Lincolnshire and Rutland.

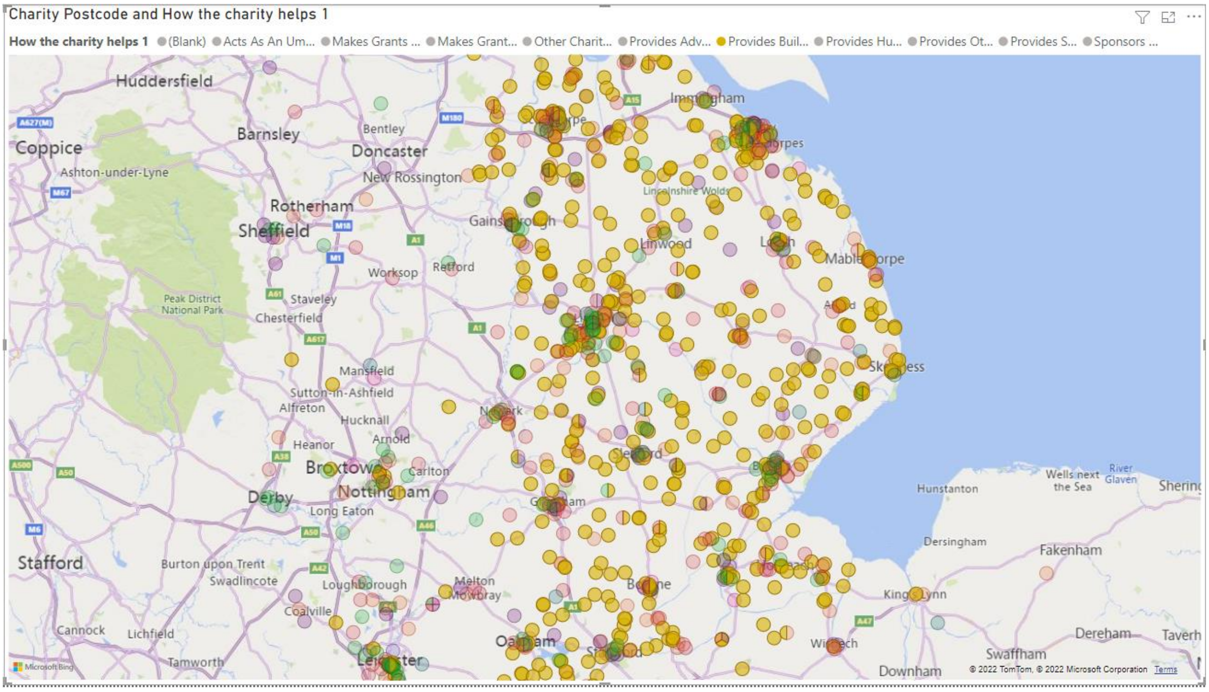


Figure 7: Distribution of charities that provide buildings, meeting space, and open space

1.4.3 Registered Societies

Of the registered societies and mutuals in Greater Lincolnshire and Rutland, 38 may be considered to provide services and products that relate directly to the Sports, Physical Activity and Leisure Sector. All of those societies submitted annual returns in the financial years 20/21 and 21/22, reporting a combined £3,650,507.32 of turnover and 212 full time equivalent employees.

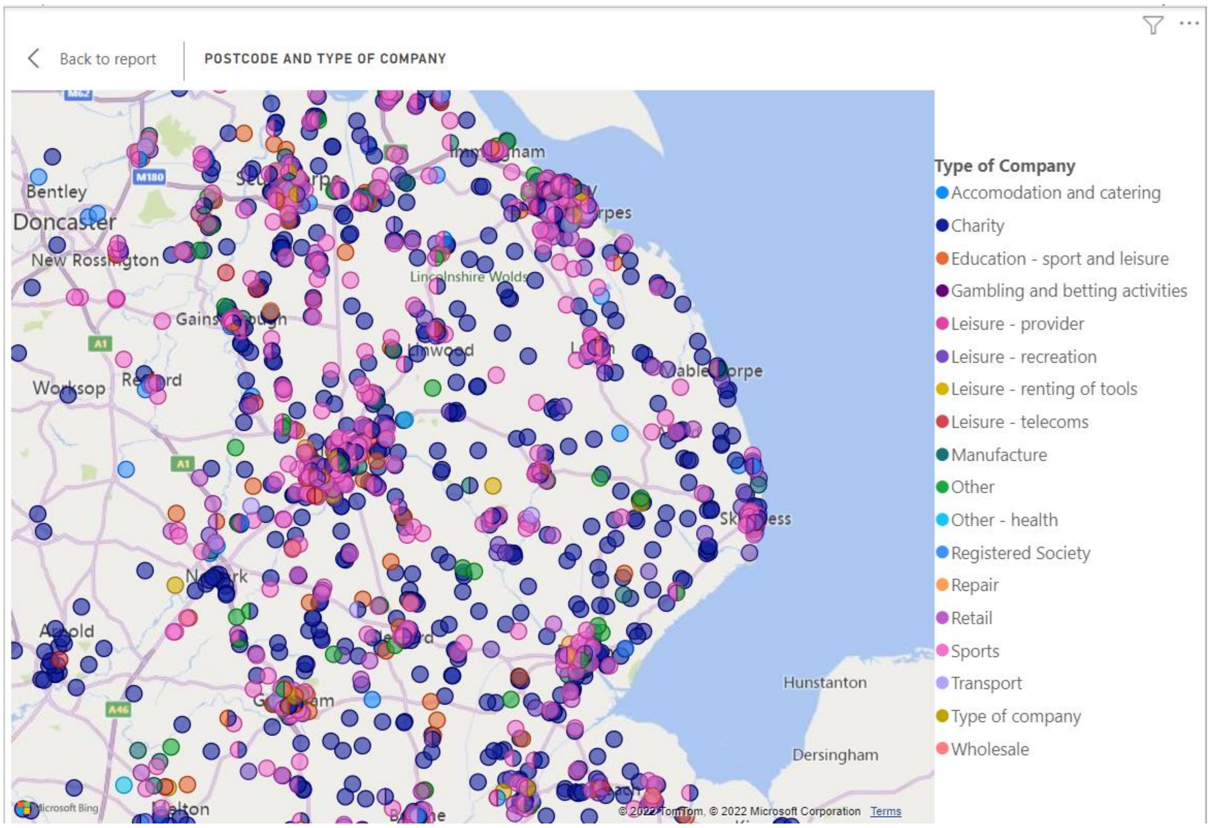
Most of these registered societies were social clubs, football and rugby clubs, or servicemen's clubs, including but not limited to:

- Blue and Gold Supporters Society Limited
- Boston and Fosdyke Fishing Society Limited
- Boston Conservative Club Limited
- Bourne and District Royal British Legion Club Limited
- Branston (Lincoln) Home Guard Social Club
- Carcroft Village Social Club Limited
- Crowle Liberal Sports and Social Club Limited
- Doncaster Rugby Football Club Limited
- East Retford Rugby Union Football Club Limited
- Grimsby Rugby Union Football Club Limited
- Grimsby Town Supporters' Society Limited

In addition to the registered societies and mutuals providing services directly to the Sports, Physical Activity and Leisure Sector are also societies that provide related services, such as Care Plus (North East Lincolnshire), Lincolnshire Co-Op, and Lincolnshire Co-Op Chemists. Taken together with the other societies and social clubs, they add up to a combined £342,508,918.32 worth of turnover and 3,639 full time employees.

1.5 Urban, coastal, and rural enterprise challenges

As seen from the data shown to this point, most businesses in the sector are clustered around towns and larger cities, although there is a sizeable population of businesses, co-operatives, mutuals, and charities in more rural and coastal settings. Specifically, charities, trusts, and community interest companies that provide buildings and open spaces seem evenly distributed throughout Greater Lincolnshire and Rutland, which shows there is the potential for delivery of sport, physical activity, and leisure to all populations.



Businesses based in more urban settings have different challenges and priorities than businesses in rural or coastal settings. The Lincolnshire coastal wards[9] for example are defined by high levels of deprivation[10] across all indices, but particularly in terms of employment, training, and access to

[9] Tetney, Marshchapel, North Somercotes, Skidbrooke with Saltfleet, Mablethorpe (North, East, and Central), Trusthorpe and Mablethorpe, Sutton on Sea (North and South) Alford, Chapel St Leonards, Ingoldmells, Winthorpe, Scarborough, Croft, Wainfleet and Friskney
[10] https://www.gov.uk/government/statistics/english-indices-of-deprivation-2019

services. Additionally, coastal wards in Greater Lincolnshire – more so than urban or rural ones – are defined by a seasonal economy, as evidenced by historical data from the DWP.

As illustrated by Figure 8, the peaks and troughs for Jobseekers' Allowance on-flows followed the end and start of tourist season consistently, up until 2018 when Universal Credit began to be rolled out.

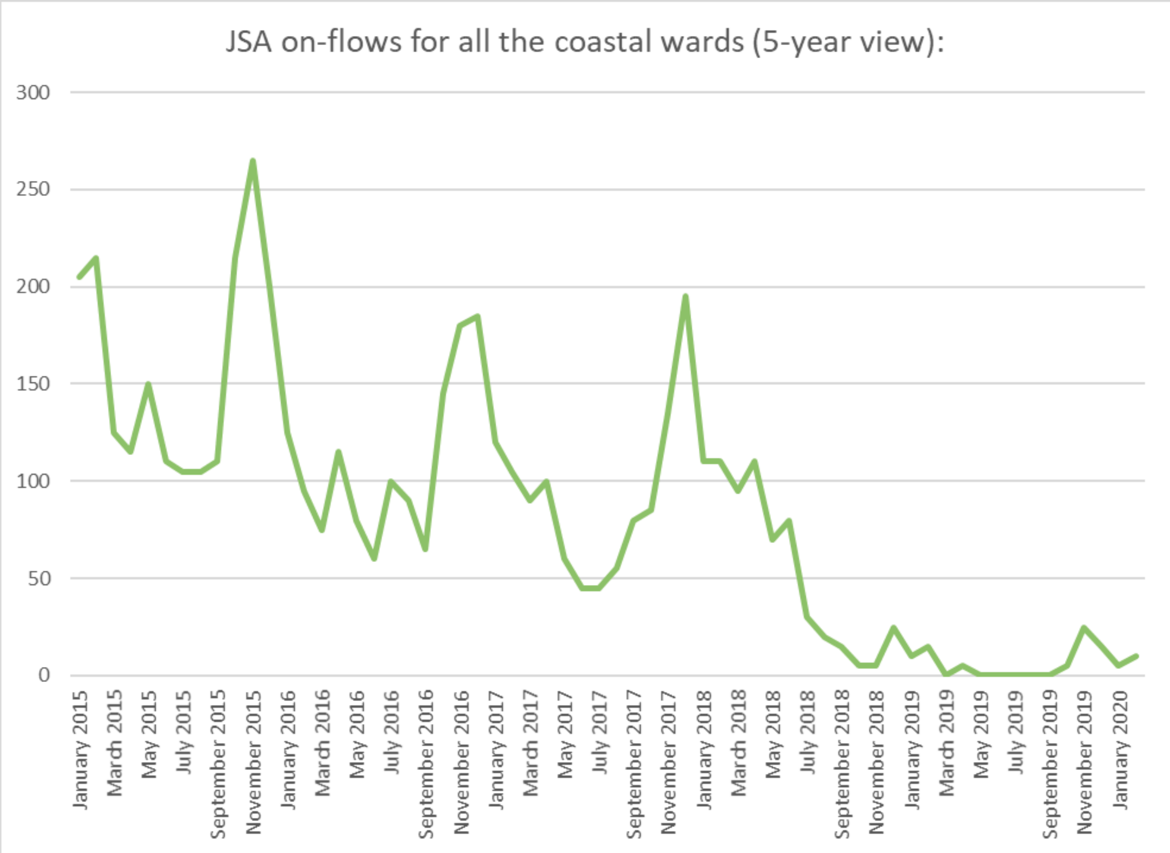


Figure 8: JSA on-flows (5-year review) coastal wards

By comparison, Jobseeker Allowance (JSA) on-flows for Lincoln city do not appear to follow similar patterns. A closer look at the data shows further that the people most impacted by that seasonality are those in sales and customer service occupations, as well as those in managerial occupations, as seen in Figure 9.

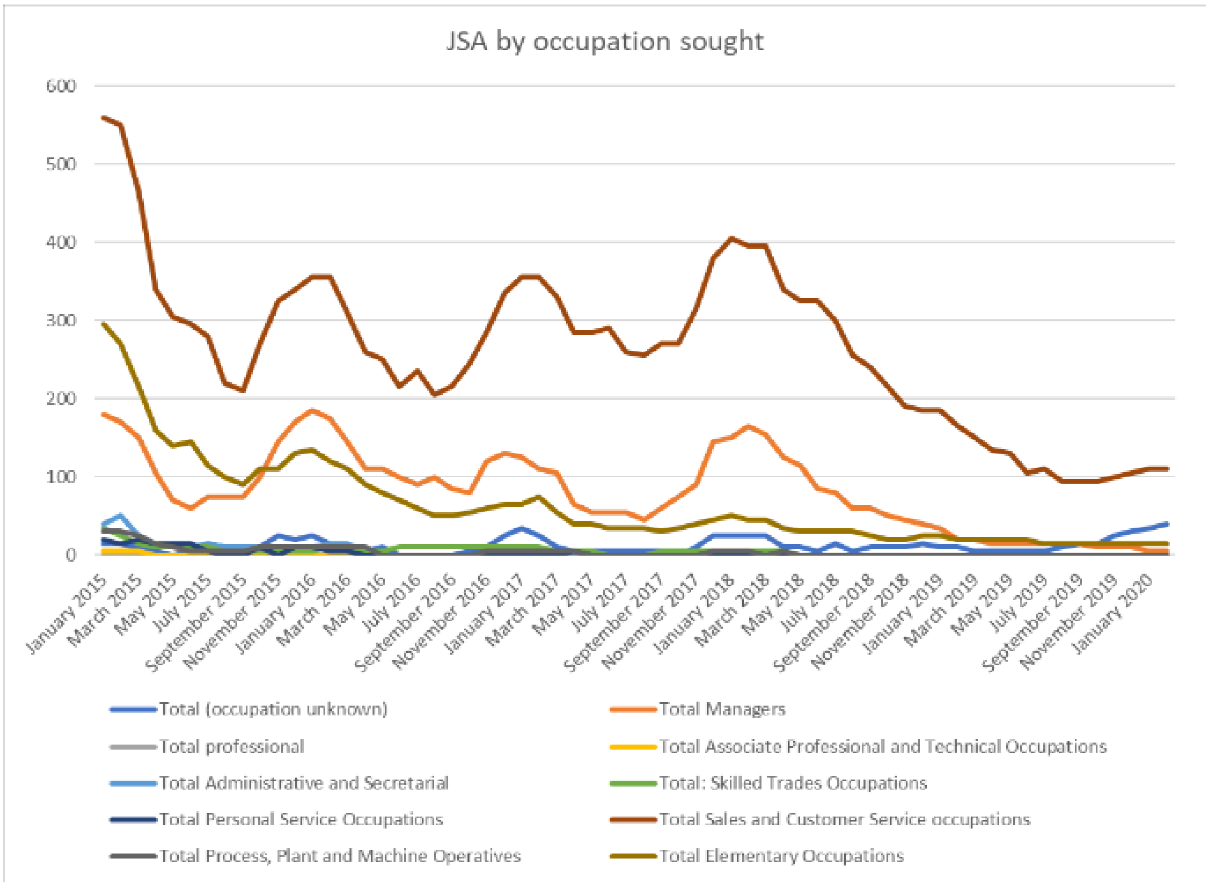


Figure 9: JSA on-flows by occupation sought (5-year review) Lincolnshire Coastal wards

The role of deprivation and regional specificities will be explored in more detail in Section 2: Forward Trends in Population Growth and Demographics. Businesses on coastal areas (and rural areas, to a lesser extent) are more likely to be impacted by the demographic factors of the area, as well as by the overall deprivation in the area. Businesses that rely on seasonal labour have fewer incentives to invest in worker development, and by the same token, seasonal workers have fewer incentives to view their current occupation as a career. The median salary for full-time workers is also lower on the coast than it is for the rest of the county, which suggests that there are fewer monetary incentives to attract workers to these areas.

	Male Full Time Workers - Coast	**Male Full Time Workers - County**	**Male Part Time Workers - Cost**	**Male Part Time Workers – County**	**Female Full Time Workers – Coast**	**Female Full Time Workers - County**	**Female Part Time Workers – Coast**	**Female Part Time Workers - County**
Average	£478.50	£547.90	£137.30	£162.10	£387.50	£411.90	£171.90	£170.90
Median	£471.50	£541.60	£137.30	£158.90	£387.00	£405.00	£178.70	£172.00
Min	£451.60	£530.10	£127.60	£149.90	£362.60	£396.20	£151.40	£159.40
Max	£509.80	£582.60	£146.90	£180.90	£420.70	£449.70	£184.60	£180.40

In addition to the known challenges to attracting talent to non-urban areas, seasonal economies were particularly impacted by the COVID-19 pandemic. This will be explored in more detail in Section 5: Understanding the Impact of COVID-19 on the Sector, but what is pertinent to this section is the fact that a lot of seasonal workers sought employment in retail and logistics during the pandemic, in pursuit of a more stable employment. In other words, areas where businesses were traditionally reliant on seasonal labour found themselves emerging from the pandemic with a significant labour shortage, and with fewer resources to address it. That has significant impacts not only on current productivity, but also on future growth opportunities.

1.6 Productivity of the sector and future growth opportunities

There are different ways to measure productivity, from monitoring profits to customer satisfaction, from comparing labour to goods produced, and monitoring employee progress[11]. Owing to the diversity of the companies that make up the sport, physical activity and leisure sector in Greater Lincolnshire and Rutland, it can be difficult to place one measure on productivity[12] but it is possible to look at the different factors that go into measuring it.

To return briefly to the stakeholder map from the start of this section, there are several identifiable groups of individuals and organisations that determine the productivity of the sector. These includes:

- For-profit organisations who create value through their product provision and service provision.
- Non-profit organisations who create value through their product provision and service provision.
- Employees, volunteers, and sole traders who create value through their labour and fundraising efforts.

Productivity can be measured in different ways, for example by dividing turnover by employees, or dividing turnover by work hours. Productivity in the charity sector can equally be measured by dividing income by volunteers or the number of hours. Depending on the approach taken, it is possible to say that for every additional employee, the sector gains an additional £16,210.04 in turnover[13]; for every hour worked, the return is £255,563.75[14]; and for every new society, charity, or community interest company, the sector gains an average of £271,588.41[15] of social value (as evidenced by charity income fundraised through the year).

The ONS supports both output per worker and output per hour worked as methods for estimating productivity. According to their latest flash productivity estimate, there appears to be a drop in productivity from quarter to quarter[16] however, due to the volatility of the market in 2020 and 2021, the ONS recommends looking at the long-term trends.

Those long-term trends are positive overall, with quarter-to-quarter growth in hours worked (1.4 percentage points) output per worker (0.5 percentage points) and GVA (0.8 percentage points). GVA, output per hour, and output per worker were all above their coronavirus levels, suggesting a trend towards growth.

It is worth noting that these ONS trends reflect the UK economy as a whole. The statistical release spends some time reflecting on the allocation effect and how it masks sector-by-sector changes. With that in mind, the ONS also notes that service industries (which include sport, physical activity, and

[11] https://www.indeed.com/career-advice/career-development/how-to-measure-productivity
[12] https://hbr.org/1988/01/no-nonsense-guide-to-measuring-productivity
[13] Turnover / Number of employees method
[14] Turnover / Number of hours worked method
[15] Funds Raised / Number of charities method
[16] https://www.ons.gov.uk/economy/economicoutputandproductivity/productivitymeasures/articles/gdpandthelabourmarket/januarytomarch2022#:~:text=Output%20per%20worker%20grew%200.5,of%20the%20coronavirus%20pandemic%20era.

leisure provision) experienced a growth of GVA (1.9%) and output per hour worked (3.5%) compared against pre-pandemic levels (but also a drop in hours worked of 1.6%).

Assuming growth continues at the current rates, private sector turnover for the sector in Greater Lincolnshire and Rutland stands to grow to up to £500 million; if we also include charities, trusts, financial mutuals and co-operatives in that estimate, GVA stands to grow up to 2% in the next four quarters, or up to £804 million in total.

If growth conditions will not be met for the sector, the next section explores the growth inhibitors that will heavily impact the Sport, Physical Activity, and Leisure sector in 2023-2024.

1.7 Growth inhibitors and the Cost-of-Living Crisis

Inflation has been, at the time of this writing, one of the central themes of conversation, with various aids being presented to consumers to help them cope with the rising cost of living. Disposable income has fallen significantly, which changes the purchasing decisions of potential clients of the sport, physical activity, and leisure sector. However, this is not the only way in which inflation may inhibit the potential growth of companies operating in the sector.

Several factors are seen as driving the overhead costs for organisations, including:

- Energy costs.
- Gas/heating costs.
- Costs of technology/digital tools.
- Labour costs and the cost of working.
- Inflation.

The challenge of recruitment, training, and retention will be explored in more detail in section 4 of this report. To give a flavour of the kind of impact high staff turnover can have on a company's overhead, consider training and recruitment costs: with median annual pay for Lincolnshire and Rutland at around £27,989 per annum, recruitment and training costs can go up to £2,800 per person[17]. Depending on the position being filled and the complexity of the task being carried out, new starters are likely to operate on reduced productivity during their first 10-15 weeks on the job, incurring opportunity costs for the business of between £1,519 and £3,546 per person[18]. Recruitment and retention is having a significant impact on the sector, with some participants reporting having to start over certain activities with brand new teams, after their old ones had left.

Associated with the cost of labour is also the cost of working. Participants in this project reported on the rising costs of fuel, personal transport, and childcare as some of the biggest concerns for their employees. At the time of writing, the cost of petrol in the UK is round £1.711 per litre[19], bringing the cost of filling a family car to between £80 and £120. A part-time place in a nursery for a child under two works out at £137 per week, or £263 per week for a full-time place. These are challenges for all households, but they pose a particular problem for single-parent households and for young women in

[17] Assuming that recruitment costs about 10% of the salary of the person being hired, either in terms of recruitment agency fees or in terms of the opportunity cost for the time spent by manager and HR.
[18] Depending on the complexity of the role and the training needed, new starters might operate at 30% to 70% productivity for their first 15 weeks.
[19] https://www.globalpetrolprices.com/United-Kingdom/gasoline_prices/

the workplace. As described by one of the participants, working is becoming too expensive for some. (This is on top of existing demographic trends – the most common reasons for women to be economically inactive in Greater Lincolnshire is either long-term illness, or looking after home and family[20].)

The cost of electricity and gas is also a significant growth inhibitor. In August 2022, Ofgem has raised the energy price cap for households to just under £4,000 p.a. However, the cost of electricity and gas for commercial venues is significantly higher than that of residential households. Prior to the change in the energy price cap, some of the interviewees for this project reported having to make difficult decisions about whether they should keep their facilities open; after the change of the energy price cap, participants were reporting plans to close the facilities that perform the least well.

These three factors - the cost of labour, the cost of working, and the cost of utilities – result in significant challenge for growth in the sector, in that they limit the supply and offer of high-quality service and activities. However, inflation and the cost of living also impact demand for the services of the sport, physical activity, and leisure sector.

At the time of writing, the Bank of England has announced an interest rate increase[21] as an attempt to curb inflation, which would also likely reduce discretionary spending. According to the ONS, half of UK adults have noticed the cost of living impacting their spending, with 35% of those adults making cuts to food and fuel expenditure. On a similar vein, 57% of respondents impacted by the cost of living crisis noted that they were spending less on non-essentials, 42% cut back on non-essential journeys, and 36% shopped around more.[22] All of those changes to consumer behaviours will have an impact on the sport, physical activity, and leisure sector, even if an economic recession does not occur as predicted.

With these growth inhibitors in mind, it is worth considering at the productivity statistics made available by the ONS and modelling what the impacts of all these growth inhibitors may be on the sector. Figure 10 shows three potential models, based on current growth trends (if productivity followed the trends seen during 2021), on historic data (if we saw the same trends as we did in 2008-2009), and if an economic slowdown occurred (GVA grew, but at slower rates than it had until this point.) The data was indexed against 2019.

[20] https://www.nomisweb.co.uk/reports/lmp/lep/1925185595/report.aspx#tabempunemp
[21] https://www.bbc.co.uk/news/business-57764601
[22] https://www.ons.gov.uk/economy/economicoutputandproductivity/output/articles/ukeconomylatest/2021-01-25#post

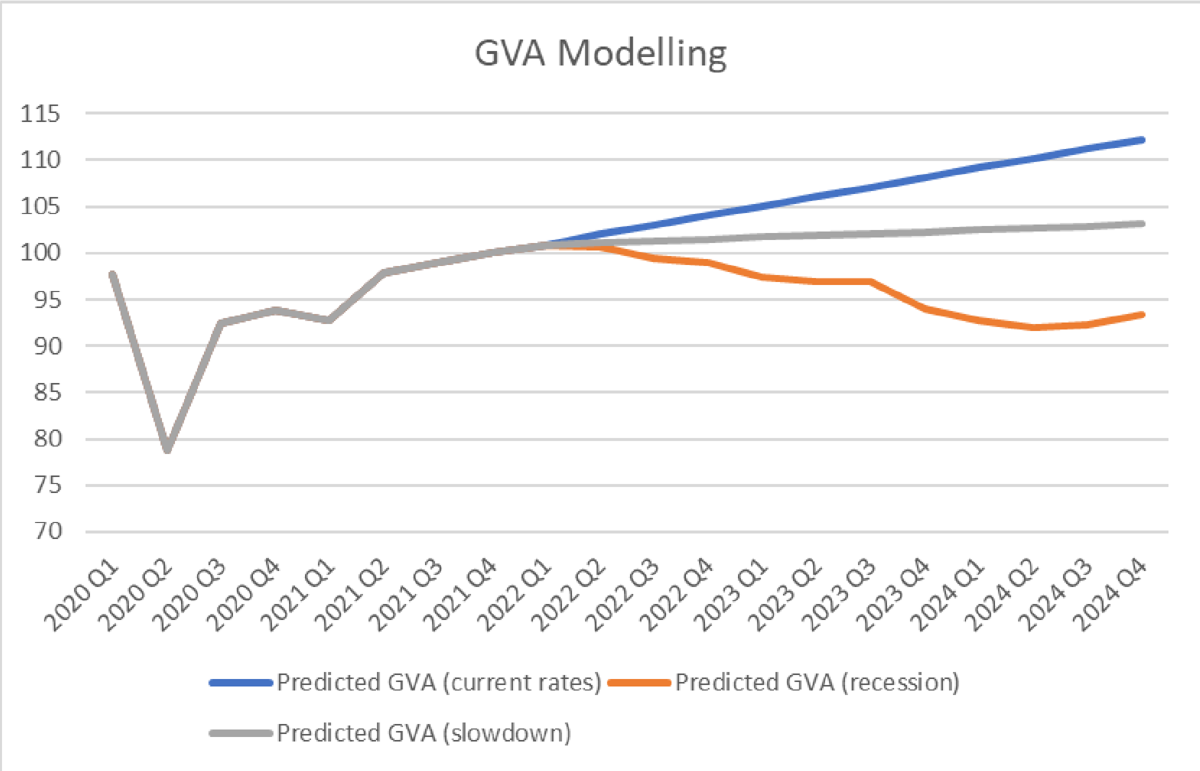


Figure 10: GVA Modelling, based on current statistics, and historic data

It is too early to tell which model is most likely to occur, but given the growth inhibitors present for the sector, it is not unreasonable to assume that an economic slowdown is highly probable. Of the companies operating in the Greater Lincolnshire and Rutland sport, physical activity, and leisure sector, the majority are micro businesses, many of which with fewer than 10 employees, which has impacts on the resilience of the company.

1.8 Recommendations

As demonstrated in this chapter, the Sport, Physical Activity, and Leisure sector of Greater Lincolnshire and Rutland is a diverse, complex environment with multiple and diverse needs. The estimated economic impact of the sector is immense, but it is facing significant growth inhibitors. As such, the recommendations of this chapter are presented as a means of addressing these inhibitors.

- Introducing more practical support for providers to cope with inflation and the cost of overheads. Examples of that include:
    - Advice and support on long-term investments, such as solar panels and insulation.
    - Advice and support on short-term energy/heating efficiencies.
    - Advice on implementing hardship support for employees.
    - Support on making the most of unused assets.
- Introducing more financial support for providers to cope with inflation and the cost of overheads. Examples of that include:
    - Grant funding schemes.
    - Hardship funds.

- Skills development programs.

- Introducing more support for charities and small providers to access pots of funding. Examples of that include:
    - Dedicated information sessions to help charities and small providers apply for funding and tenders.
    - Dedicated helpline/website for charities and small providers.
    - Overhauling tender rules to make it easier for small providers and charities to apply for various programs.
- Introducing more opportunities for charities and small providers to access business advice and support. Examples of that include:
    - Extending the business networks to include charities and small providers.
    - Dedicated business support services to help charities and community interest companies make the most of their assets.
    - Active efforts to get business professionals on charity trustee boards.
- Introducing schemes for skills development and talent retention in the sector. Examples of that include:
    - Dedicated training and skills funds.
    - Dedicated training and skills programs.
    - Bringing the training to the employers or removing barriers to training.
    - Developing multi-skilled pathways.
    - Lobbying for and introducing programs that would encourage employee retention.
- Introducing schemes to address the cost of working. Examples of that include:
    - Schemes to address the cost of travel, particularly for entry-level workers who cannot fulfil their obligations from home.
    - Schemes to address the cost of childcare.
    - Family carer support schemes.
    - Collaborations with carer support charities, such as Carers First.

2. Chapter Two: Forward trends in population growth and demographics of Greater Lincolnshire and Rutland

2.1 Section Headlines

Populations projections show that the Greater Lincolnshire LEP area and Lincolnshire are projected to experience a steady increase in population over the next 20 years.

Lincolnshire data[23] show that the district of Lincoln has the largest proportion of women and girls who are of working age, whilst the lowest proportion is in East Lindsey. Rutland data[24] show that 55.9% of women and girls are of working age. Data on North and North East Lincolnshire[25] show that both areas have 59.2% of their women and girls who are of working age.

There is growing number of people of pensionable ages, and a reducing number of children in the UK.

The average life expectancy by 2045 is anticipated to be 82.2 years for men and 85.3 years for women.

Overall, 93.29% of the population describe themselves as being "White: English/ Welsh/ Scottish/ Northern Irish/ British".

North Lincolnshire is the area with the most residents describing their ethnicity as "Asian/ Asian British", at 3% of the area's total population. The second highest numbers are reported by North East Lincolnshire, at 2,129 individuals, however translates to just 1% of the area's population.

Data on the 2019 IMD for the Greater Lincolnshire and Rutland taken from www.gov.uk[26] shows that there are more LSOAs in the most deprived 10% in England in North East Lincolnshire than in any other area of Greater Lincolnshire and Rutland.

Outside of North East Lincolnshire, the areas of East Lindsey, Lincoln and North Lincolnshire have the most areas within the most deprived 10% in England.

The areas of North Kesteven, South Kesteven, and Rutland are relatively less deprived according to the 2019 IMD.

2.2 General Demographic Information

Data on the 2021 population of Greater Lincolnshire and Rutland taken from the 2021 Census[27] show a total of 1,136,000 residents across Greater Lincolnshire and Rutland. This figure has risen by 57,916 according to 2011 Census figures, with increased populations across all of the wider area except in North East Lincolnshire which actually saw a 1.7% drop in population. The largest recorded increase in population by local authority area was seen in Lincoln at 11.1%, and the lowest increase was seen in North Lincolnshire, at just 1.3%.

[23] https://www.nomisweb.co.uk/reports/lmp/la/1946157150/subreports/wapop_compared/report.aspx?allInGB=&pivot=female&&sort=1&ascending=
[24] https://www.nomisweb.co.uk/reports/lmp/la/1946157150/subreports/wapop_compared/report.aspx?allInGB=&pivot=female&&sort=1&ascending=
[25] https://www.nomisweb.co.uk/reports/lmp/la/1946157111/subreports/wapop_compared/report.aspx?
[26] https://www.gov.uk/government/statistics/english-indices-of-deprivation-2019
[27] https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/bulletins/populationandhouseholdestimatesenglandandwales/census2021

Census Population Data 2011 and 2021

Area	Usual resident population, 2011	Usual resident population, 2021	Percentage change
Lincolnshire	713,653	768,400	N/A
Boston	*64,637*	*70,500*	*9.1*
East Lindsey	*136,401*	*142,300*	*4.3*
Lincoln	*93,541*	*103,900*	*11.1*
North Kesteven	*107,766*	*118,000*	*9.5*
South Holland	*88,270*	*95,100*	*7.7*
South Kesteven	*133,788*	*143,400*	*7.2*
West Lindsey	*89,250*	*95,200*	*6.7*
Rutland	37,369	41,000	9.7
North East Lincolnshire	159,616	156,900	-1.7
North Lincolnshire	167,446	169,700	1.3
Greater Lincolnshire and Rutland Total	1,078,084	1,136,000	N/A

Within the county of Lincolnshire, the districts of East Lindsey and South Kesteven are the most populous, whilst Boston has the smallest number of residents, as shown below.

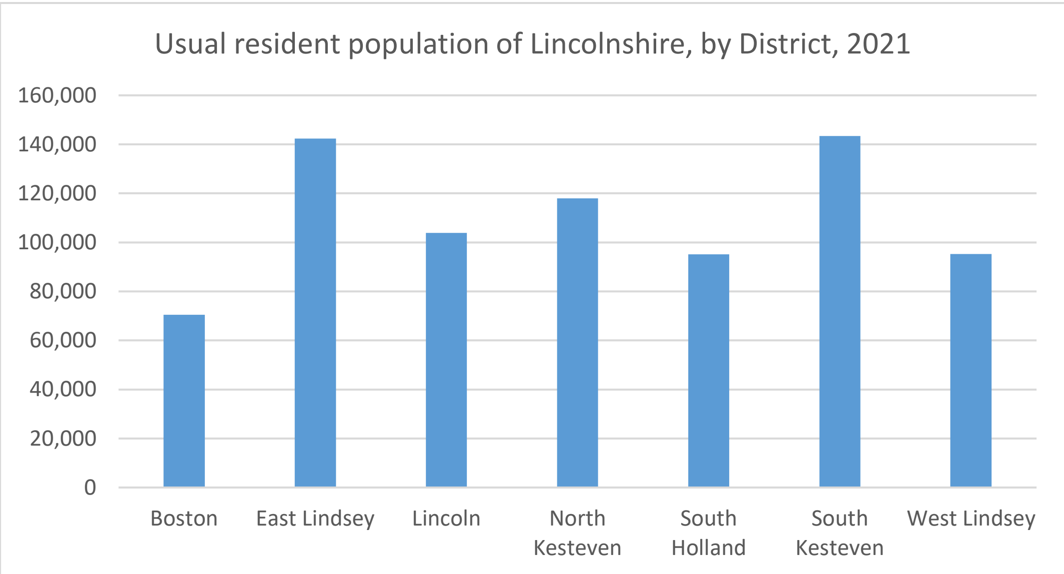


Figure 11: Population of Lincolnshire by District – 2021

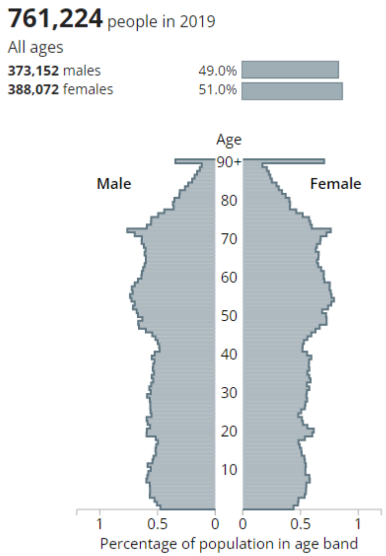
Population Estimate data by sex and by age group from the *Office for National Statistics, National Records of Scotland, Northern Ireland Statistics and Research Agency* for 2019 in Lincolnshire, Rutland, North East Lincolnshire, and North Lincolnshire are shown below as population pyramids[28]. These show that, with the exception of Lincolnshire, areas have similar age demographic profiles, with dips in population for those in their early 20s (potentially as a result of those in this age group moving away from home to access Higher Education).

[28] https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/articles/ukpopulationpyramidinteractive/2020-01-08

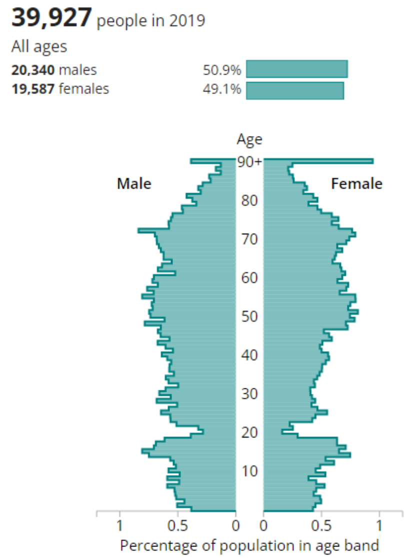
The dip amongst young people in this age range appears particularly pronounced in Rutland, and likely appears so due to the relatively smaller overall population size there. In contrast to this, there are a greater number of young adults in Lincolnshire. Across all four authority areas there are slightly lower numbers of adults in their early 40s, as well as reduced numbers of very young children. All areas have high numbers of older people born in the post-World War II “baby boom”, and large numbers of those who are over the age of 90.

2019 Population Estimation Pyramids, by Geography

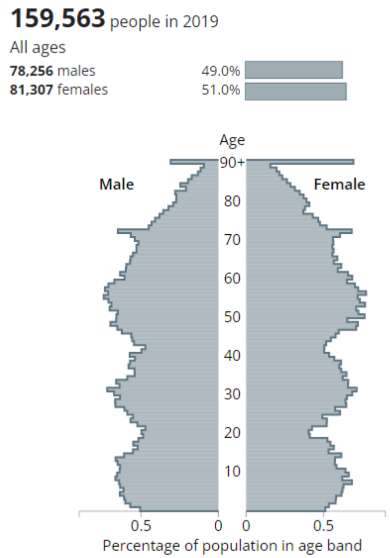
Lincolnshire



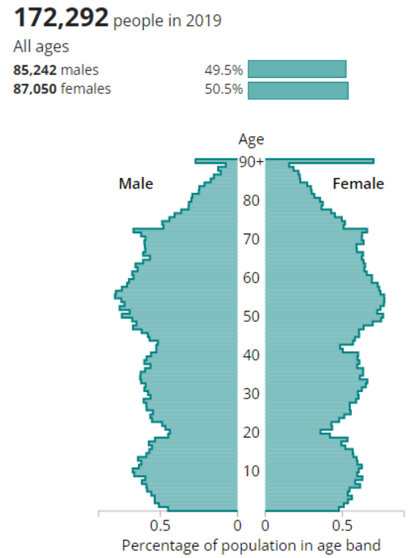
Rutland



North East Lincolnshire



North Lincolnshire



2.2.1 Population Projections

Population projections available via the Lincolnshire Research Observatory[29], North East Lincolnshire Data Observatory[30], the North Lincolnshire Local Plan[31], and key statistical data on the Rutland County Council website[32] show that the Greater Lincolnshire LEP area and the county of Lincolnshire are projected to experience a steady increase in population over the next 20 years, as shown below. Small increases are projected over a shorter period of time in North Lincolnshire and Rutland, and the population of North East Lincolnshire is expected to drop very slightly over the next 20 years, which is supported by the current Census return figures compared to 2011 Census data.

Table: Population Projection for Greater Lincolnshire and Rutland

Area	Year 2023	Year 2028	Year 2033	Year 2038	Year 2043
Greater Lincolnshire LEP	1117000	1140000	1157300	1171800	1186700
Lincolnshire	782500	804800	821900	835800	849600
Boston	73500	76400	78700	80700	82600
East Lindsey	146500	151400	155300	158700	161700
Lincoln	99500	101100	102300	102300	102500
North Kesteven	121500	125800	128700	131200	133700
South Holland	98500	102100	105100	107700	110300
South Kesteven	145600	148800	151200	153400	155800
West Lindsey	97300	99200	100600	101800	102900
Rutland*	39000	40000	-	-	-
North East Lincolnshire**	159948	159,494	158,898	158,698	158,811
North Lincolnshire***	173700	175300	175900	176400	-
* Projected figures are rounded to the nearest thousand. No projection available beyond 2028. ** No projection available for 2023, therefore 2024 projection is given. *** No projection available for 2038, therefore 2036 projection is given. No projection available for 2043.					

Within the county of Lincolnshire, district level projections are available via the Lincolnshire Research Observatory[33]. These show that increases in population are forecast across all seven districts, with the greatest increase in population forecast in East Lindsey, and the smallest increase forecast in the district of Lincoln (see Figure 12). Overall, the data suggests that there will be an increasing need for physical activities based upon an increasing number of residents across Lincolnshire and Rutland over the next few years, with the greatest increase in need experienced in East Lindsey.

[29] https://www.research-lincs.org.uk/Population.aspx
[30] https://www.nelincsdata.net/population/#/view-report/20a1ac6746bc4e62bd666ae95f0f2749/___iaFirstFeature
[31] https://localplan.northlincs.gov.uk/stages/3/2-north-lincolnshire-facts
[32] https://www.rutland.gov.uk/
[33] https://www.research-lincs.org.uk/LROPresentationTools/UI/Pages/MappingTool.aspx?dataInstanceID=8225

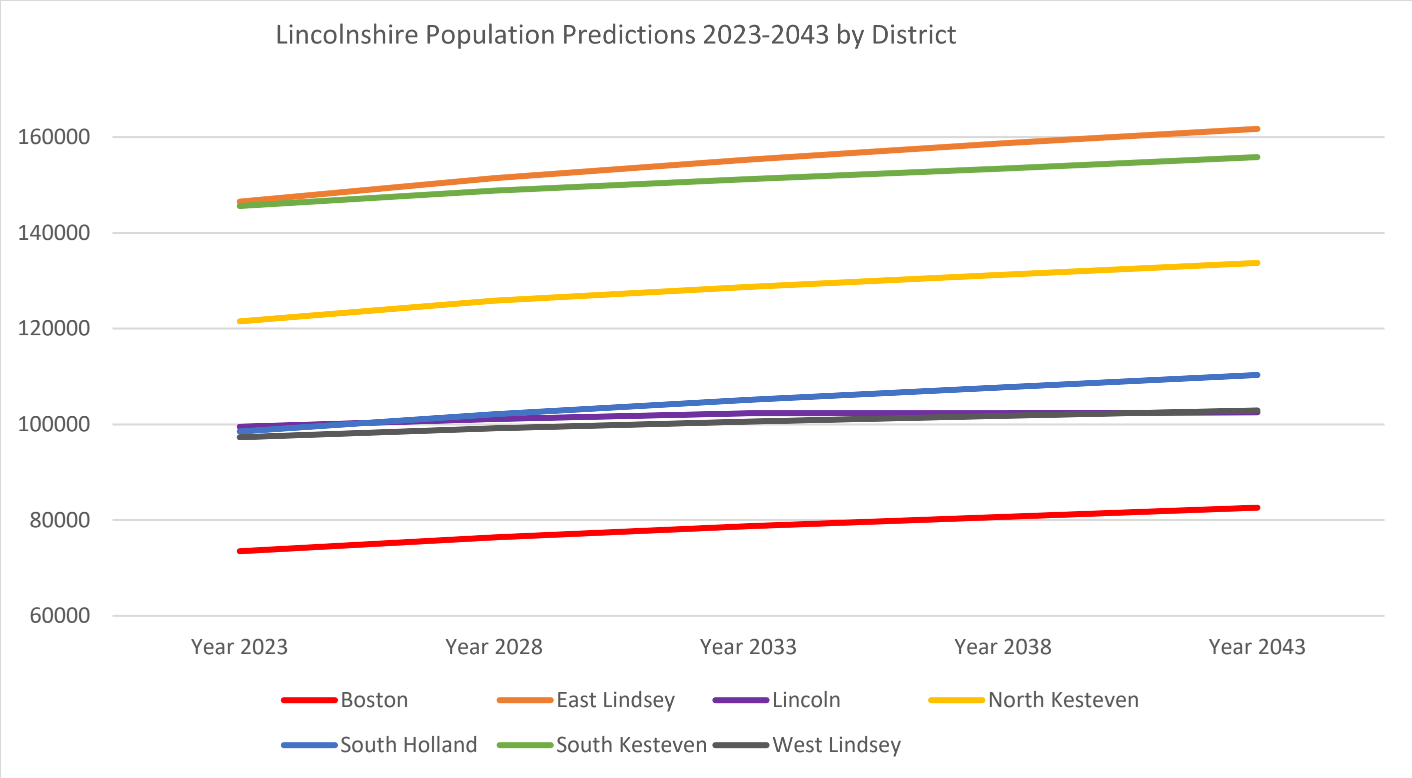


Figure 12: Population Projection Trajectories for Lincolnshire Districts to 2043

2.3 Gender (with a focus on Women and Girls)

Population estimates for 2019 across Greater Lincolnshire and Rutland[34] show that roughly half of the population of each area is made up of men, and half is made up of women.

Estimated Population Figures for 2019, by Gender

Area	Men	Women	Men %	Women %
Lincolnshire	373,152	388,072	49	51
Rutland	20,340	19,587	50.9	49.1
North East Lincolnshire	78,256	81,307	49	51
North Lincolnshire	85,242	87,050	49.5	50.5

Of the population of women and girls, women aged 16-64, (i.e., of working age, based on 2020 mid-year estimates). Lincolnshire data[35] show that the district of Lincoln has the largest proportion of women and girls who are of working age, whilst the lowest proportion is in East Lindsey. Rutland data[36] show that 55.9% of women and girls are of working age, whilst North and North East Lincolnshire figures[37] show that both areas have 59.2% of their women and girls who are of working age.

[34] https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/articles/ukpopulationpyramidinteractive/2020-01-08
[35] https://www.nomisweb.co.uk/reports/lmp/la/1946157150/subreports/wapop_compared/report.aspx?allInGB=&pivot=female&&sort=1&ascending=
[36] https://www.nomisweb.co.uk/reports/lmp/la/1946157150/subreports/wapop_compared/report.aspx?allInGB=&pivot=female&&sort=1&ascending=
[37] https://www.nomisweb.co.uk/reports/lmp/la/1946157111/subreports/wapop_compared/report.aspx?

Number of Women of Working Age, and Percentage of All Women and Girls who are of working age, by Area

District	Number of Women of Working Age	% of all Women and Girls Who are of Working Age
Lincolnshire	229,700	58.8
Boston	*20,900*	*58.9*
East Lindsey	*39,700*	*54.6*
Lincoln	*33,700*	*67.4*
North Kesteven	*35,500*	*58.7*
South Holland	*28,200*	*57.7*
South Kesteven	*43,100*	*58.2*
West Lindsey	*28,500*	*58.1*
Rutland	11,000	55.9
North East Lincolnshire	48,000	59.2
North Lincolnshire	51,700	59.2

Implications of these data include the anticipated need for activities attractive to women and girls of working age in Greater Lincolnshire and Rutland is high, particularly in the district of Lincoln. Many women in this bracket will work traditional office hours, it is important to provide activities which are available outside of these hours to enable more women to engage. As many women in this age bracket will also have childcare responsibilities, this needs to be taken into consideration, for example through the provision of suitable childcare options to enable mothers/carers to engage; the provision of activities that women can take their children to; or access to whole-family activities. As women are also more likely to be in unpaid caring roles than men, it would be useful to explore how this may impact upon women's ability and motivation to engage in physical activity, for example the provision of respite support for regular activities, or ad hoc/ non-bookable access to physical activity that allows for maximum flexibility.

2.3.1 Maternity

Using Live Births data for 2020 from NOMIS[38], as shown in the table below, the number of women who were either pregnant or up to one-year post-natal in 2020/21 (not taking into account mothers with multiple births or stillbirths) can be estimated to be around 10,000. This can provide information on the approximate number of women who may have been accessing maternity leave during this time and for whom suitable post-natal exercise would be relevant. This data can also indicate the number of pregnant women who may be interested in ante-natal fitness in a one-year period. Further implications include that new mothers are likely to require access to some form of childcare, or may want to access activities where they can bring their babies along.

In Lincolnshire, the number of live births was 6,600, with the highest number in South Kesteven, and the lowest number in Boston. Unsurprisingly due to its size, Rutland has the lowest number of births, whilst the highest birth rates were in North Lincolnshire and North East Lincolnshire. This suggests

[38] https://www.nomisweb.co.uk/query/construct/summary.asp?menuopt=200&subcomp=

that the areas in most need of ante-natal/maternity related provision in Greater Lincolnshire are North Lincolnshire, North East Lincolnshire, and South Kesteven.

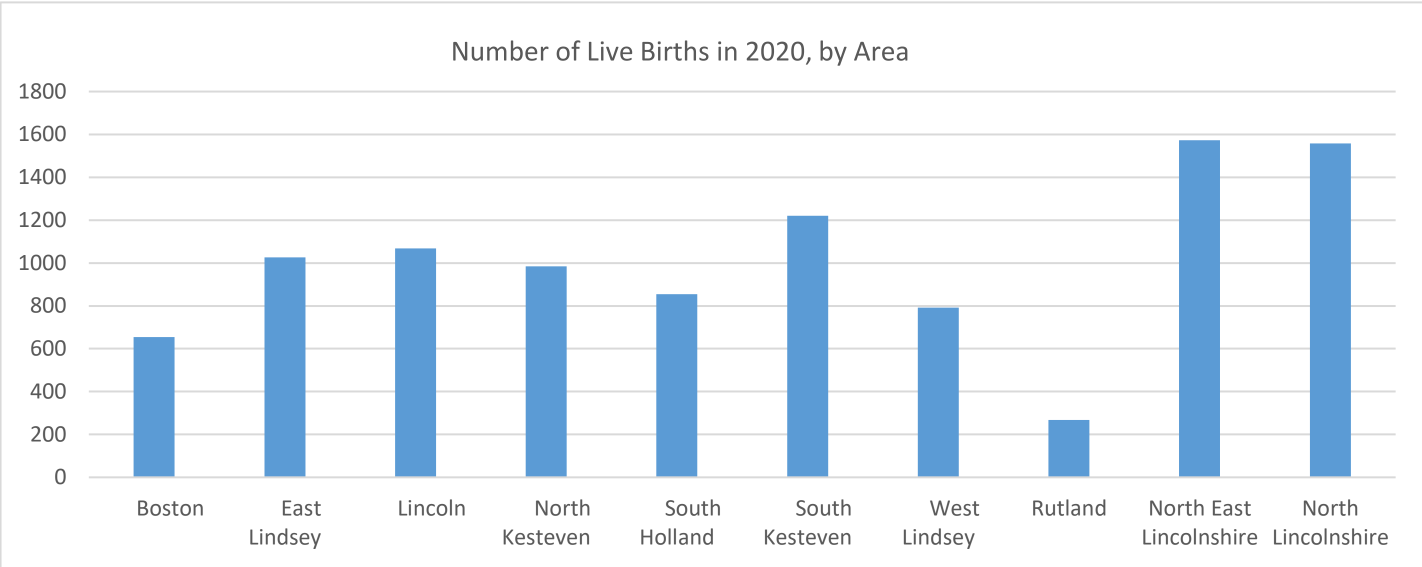


Figure 13: Number of Live Births in 2020, by Area

2.4 Age (with a focus on the Over 65s)

The demography of the UK is changing as people are living longer[39]. Figure 14 (taken from the OFS' National population projections: 2020-based interim[40]), shows that there is an aging population in the UK and a dropping birth rate.

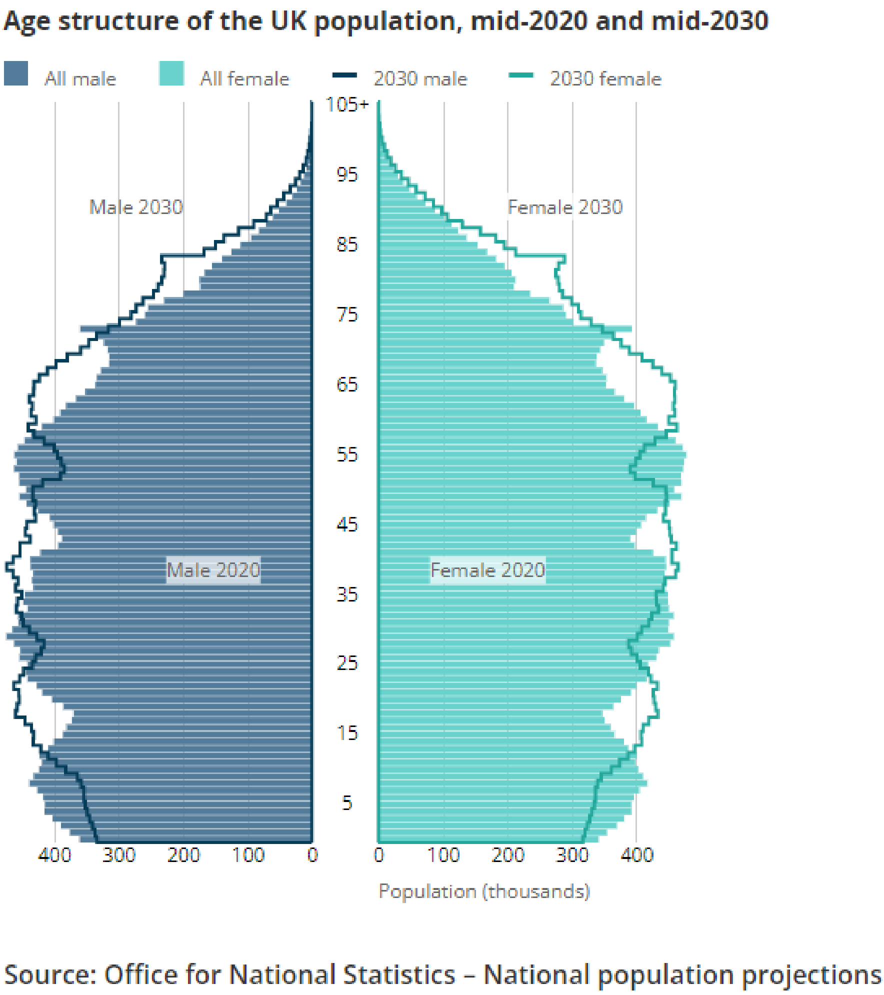


Figure 14: Age Structure of the UK Population- Mid 2020 and mid 2030

This means that there are a growing number of people of pensionable ages, and a reducing number of children in the UK. In addition, the average life expectancy by 2045 is anticipated to be 82.2 years for men and 85.3 years for women, as shown below. This demonstrates that the need for physical activities suitable for people over the age of 65 will increase significancy over the next 10-20 years across the UK.

[39] https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationprojections/bulletins/nationalpopulationprojections/2020basedinterim#changing-age-structure https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/articles/ukpopulationpyramidinteractive/2020-01-08
[40]

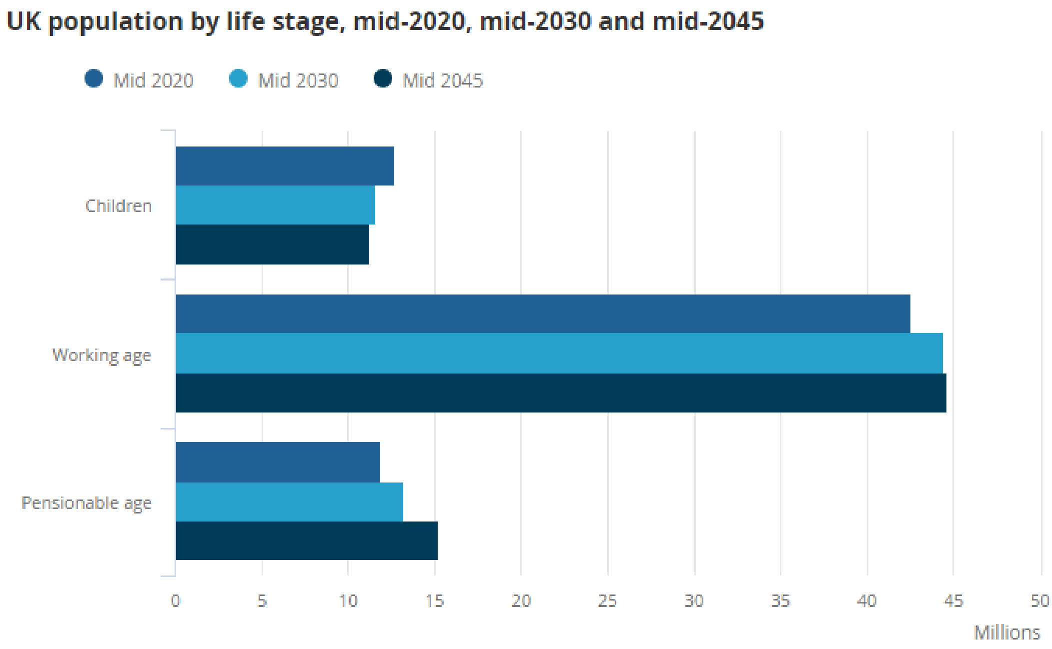


Figure 15: UK Population Projections by Life Stage

Office for National Statistics – National population projections

	2018-based	2020-based
Net annual long-term international migration (year ending mid 2025 onwards)	190,000	205,000
Long-term average number of children per woman	1.78	1.59
Life expectancy at birth, males, 2045 (years)	82.8	82.2
Life expectancy at birth, females, 2045 (years)	85.7	85.3

Notes

1. Life expectancies are period expectations of life for the start of 2045. They do not account for future improvements in mortality projected after that point.

Figure 16: ONS National Population Projections

Mid-2020 population estimates for Greater Lincolnshire[41,42,43] and Rutland show the proportion of residents, by area, who are aged 65 and over, as well as the England and East Midlands proportions for comparison. This shows that at 23%, Greater Lincolnshire has a higher proportion of 65+ residents than both the England (18.5%), and regional average (19.6%). The only area with a lower percentage

[41] https://www.research-lincs.org.uk/LROPresentationTools/UI/Pages/MappingTool.aspx
[42] https://www.nelincsdata.net/ons-mid-year-population-estimates-summary/#/view-report/fd478b813fa84b68b7ee90c24db484fc/E06000012
[43] https://www.northlincs.gov.uk/wp-content/uploads/2022/04/NL_Population_profile_final_v1-a.pdf

than the England and East Midlands average is Lincoln, at 15.3%. Other areas have similar, but higher than average rates, at between 20.9% and 25.2%. The area with by far the greatest proportion of residents aged 65 and over is East Lindsey, with just under 1/3 of the population being of pensionable age.

Table: Percentage of 2020 Population aged 65+, by Area

Area	Percentage of Population aged 65 and Over (%)
England	18.5
East Midlands	19.6
Greater Lincolnshire LEP	23
Lincolnshire	23.8
Boston	*21*
East Lindsey	*30.4*
Lincoln	*15.3*
North Kesteven	*23.6*
South Holland	*24.3*
South Kesteven	*23.4*
West Lindsey	*25.2*
Rutland *	24.7
North East Lincolnshire	20.9
North Lincolnshire	22
* Calculated using the estimated number of residents in total according 2020-mid Year estimates, and the number of residents 65+, taken from two different sources.	

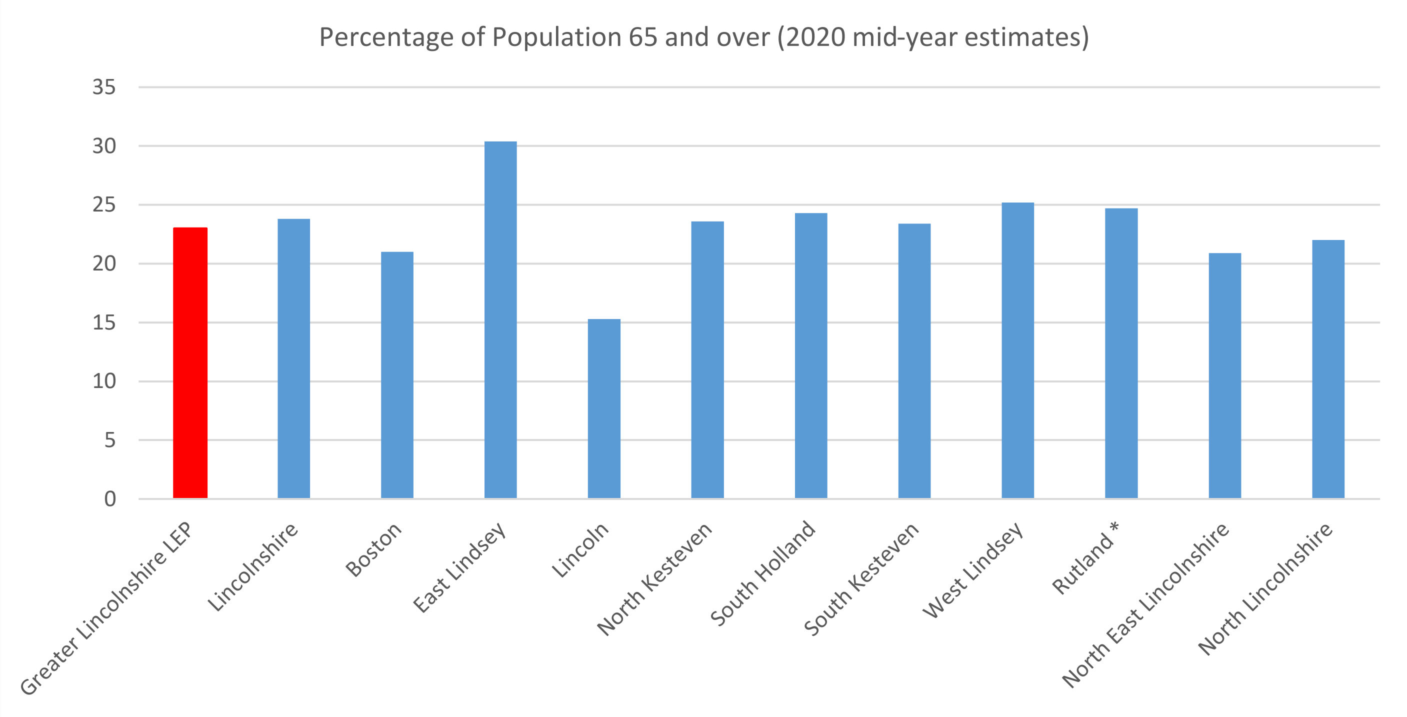


Figure 17: Percentage of Population Aged 65 and Over

The data shows that there is likely to be a significant demand of physical activities which appeal to, and are accessible to, over 65s across the GLLEP area. As per UK-wide population predications, this demand will continue to rise over the next 10-20 years. The area currently most in need of access physical activities which meet the needs of the over 65s based on the proportion of over 65s is East Lindsey. This matches the area most challenged by rurality, therefore accessibility of activities from a travel and transport perspective, as well as a physical needs perspective is important.

2.4.1 Healthy Life Expectancy

Healthy Life Expectancy at Birth (HLE) figures for the UK provided by ONS[44] show that the UK average HLE is 62.2 years for males, and 63.6 years for females. HLE figures for the East Midlands (including Lincolnshire and Rutland) are slightly lower at 62.0 years for males and 61.8 years for females, a reduction of 0.8 years for men and 0.3 years for women on 2015-2017 figures.

HLE figures for men in Yorkshire and the Humber (including North and North East Lincolnshire) are slightly lower than both the East Midlands and the UK average for men, with a HLE of 61.1 years (down 0.6 years from 2015-2017 figures). At 62.1 years for women, the HLE in Yorkshire and the Humber is slightly higher than for women in the East Midlands (61.8), but still less than the UK average of 63.6. Interestingly, whilst the HLE for women has dropped in the East Midlands for 2017 compared to 2015, and remained the same across the UK, the HLE for women in Yorkshire and the Humber has risen very slightly (by 0.5 years).

[44] https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/healthandlifeexpectancies/bulletins/healthstatelifeexpectanciesuk/2018to2020

Healthy life expectancy (HLE) at birth estimates, UK, constituent countries and English regions, 2018 to 2020

Healthy life expectancy (HLE) at birth estimates, UK, constituent countries and English regions, 2018 to 2020						
	Males			Females		
	HLE at birth in 2018 to 2020 (years)	Change since 2015 to 2017		HLE at birth in 2018 to 2020 (years)	Change since 2015 to 2017	
		Years	Months		Years	Months
UK	62.8	-0.3	-3.6	63.6	0.0	0.0
England	63.1	-0.2	-2.4	63.9	0.1	1.2
North East	59.1	-0.4	-4.8	59.7	-0.7	-8.4
North West	61.5	0.3	3.6	62.4	0.2	2.4
Yorkshire and the Humber	61.1	-0.6	-7.2	62.1	0.5	6.0
East Midlands	62.0	-0.8	-9.6	61.8	-0.3	-3.6
West Midlands	61.9	-0.2	-2.4	62.6	-0.2	-2.4
East of England	64.6	0.5	6.0	65.0	0.4	4.8
London	63.8	-0.1	-1.2	65.0	0.4	4.8
South East	65.5	-0.6	-7.2	65.9	-0.2	-2.4
South West	64.7	0	0.0	65.5	0.4	4.8
Wales	61.5	0	0.0	62.4	0.3	3.6
Scotland	60.9*	-1.4	-16.8	61.8	-0.9	-10.8
Northern Ireland	61.5	0.3	3.6	62.7	-0.1	-1.2
Source: Office for National Statistics						
Notes 1. * denotes countries where HLE has changed significantly either positively or negatively from 2015 to 2017 based on non-overlapping confidence intervals. 2. Change in HLE in months was calculated by multiplying the change in HLE at birth between 2015 to 2017 and 2018 to 2020 by 12.						

2.5 Ethnicity (with a focus on Ethnic Minorities)

Ethnicity data from the 2011 census (shown in full in Appendix B) shows that the vast majority of the population of Greater Lincolnshire report their ethnic group to be one of the available categories reported under “White”. Overall, 93.29% of the population describe themselves as being “White: English/Welsh/Scottish/Northern Irish/British”, as shown in Figure 18.

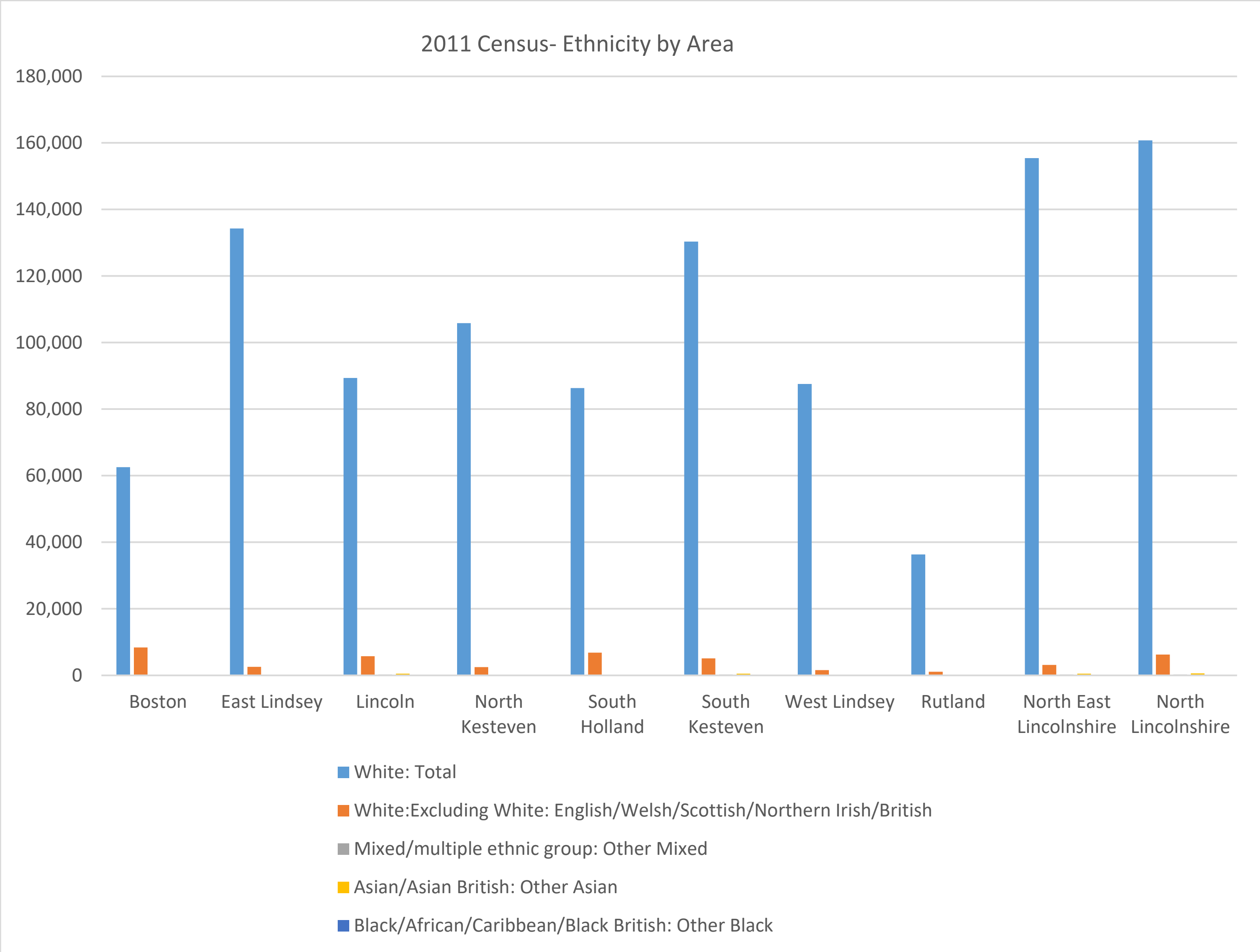


Figure 18: 2011 Census – Ethnicity by Area

2.5.1 Other White Backgrounds

By isolating the “White: English/Welsh/Scottish/Northern Irish/British” figures, the population data shows that the next largest group in Greater Lincolnshire is made up of residents who report their ethnicity as being “White”, but not “English/Welsh/Scottish/Northern Irish/British”, a group which makes up 4% of the overall population, and is largest in Boston, South Holland and North East Lincolnshire, with between 6,000 and 8,000 residents in each of these three areas.

Further breakdown of the figures for "White" to include only nationalities with over 100 individuals residing in Greater Lincolnshire shows that the majority of non-UK/British White residents live in Boston, South Holland, Lincoln and North Lincolnshire, and the fewest live in West Lindsey and in Rutland. Of the nationalities recorded, the two largest populations groups are those from Poland and the Baltic States, with the latter being particularly represented in Boston and South Holland. It is not clear what the implications of that are, however. More consultation with the populations should be carried out in order to identify activities that would be the most attractive.

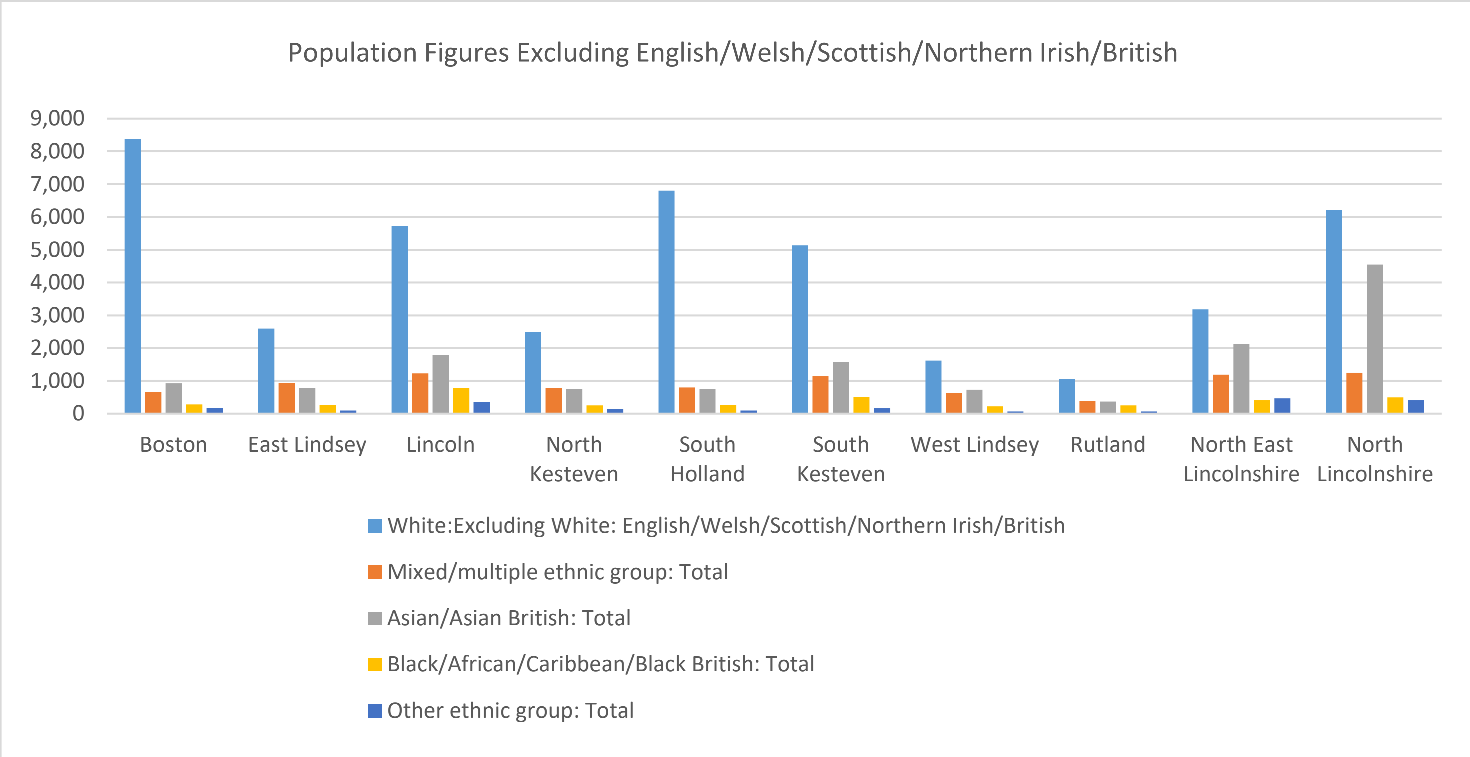


Figure 19: 2011 Population - Excluding the Majority Group of "English/Welsh/Scottish/Northern Irish/British"

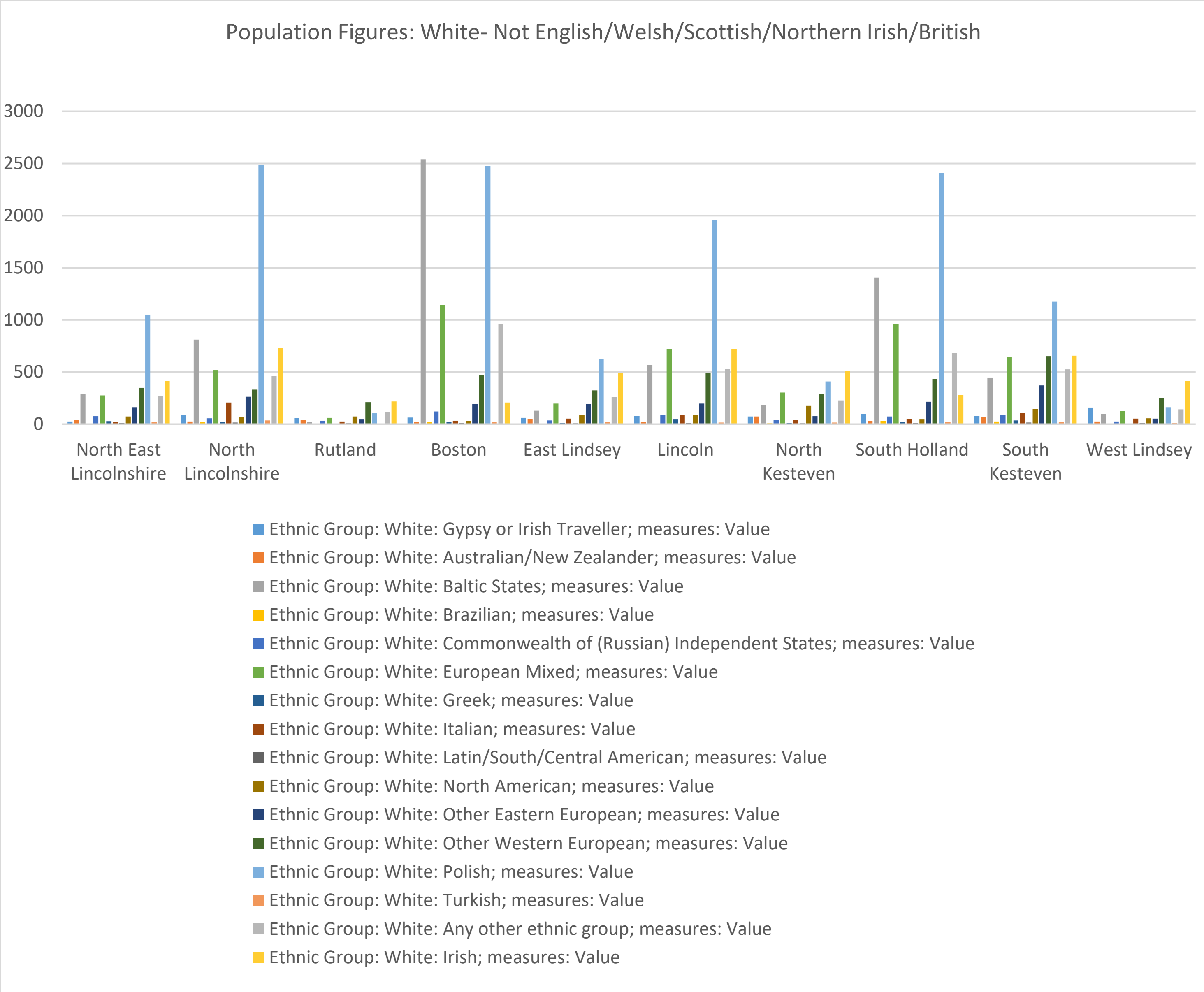


Figure 20: 2011 Population - "White" residents, (NOT English/Welsh/Scottish/Northern Irish/British) by nationality (where over 100 individuals of that nationality reside in Greater Lincolnshire)

2.5.2 Asian Backgrounds

Overall, 1.3% of the population of Greater Lincolnshire and Rutland reported that their ethnicity was Asian or British Asian in the 2011 Census (as shown in Appendix B). North Lincolnshire was the area with the most residents describing their ethnicity as "Asian/Asian British", at 3% of the area's total population (14,359 individuals). The second highest number of Asian/British Asian residents were recorded in North East Lincolnshire, at 2,129 individuals, which translates to 1% of the area's population. A total of 1,794 Asian/Asian British individuals were recorded in the district of Lincoln, making up 2% of the district's population.

Across the Greater Lincolnshire and Rutland area, the largest ethnic group within the category of "Asian/British Asian" was Indian (4,222 individuals), of whom around a quarter were resident in North Lincolnshire (see Figure 21). There were 2,214 Bangladeshi individuals across the whole of Greater Lincolnshire and Rutland in 2011, however, over half lived in North Lincolnshire, making them the largest Asian/British Asian subgroup within the area.

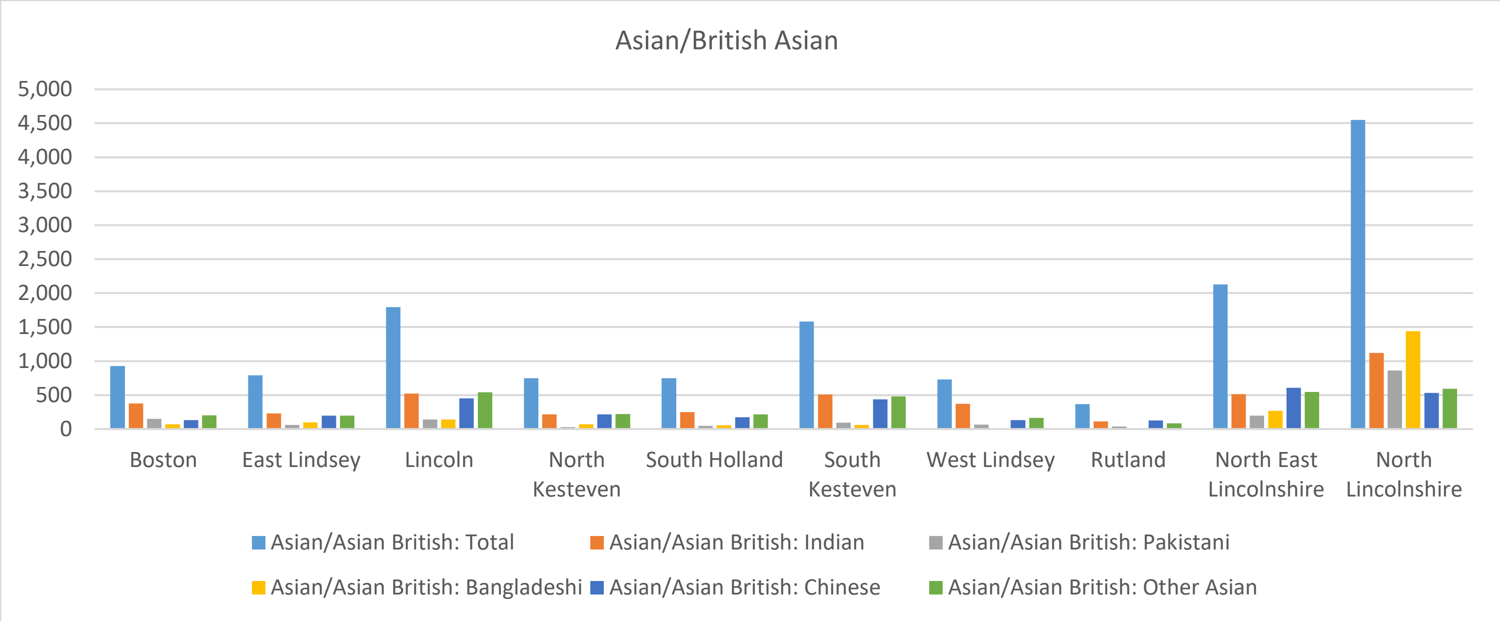


Figure 21: 2011 Population – Asian/British Asian

2.5.3 Black Backgrounds

In 2011, there were relatively few individuals who described their ethnicity as "Black/African/Caribbean/Black British" across Greater Lincolnshire and Rutland, with a total of just 3,717 residents, equating to 0.34% of the area's population (see Appendix B). The greatest number of Black/African/Caribbean/Black British residents (778) lived in the district of Lincoln, where they comprised 0.83% of the population of the district. Across the Greater Lincolnshire and Rutland area as a whole, and in each individual area, the largest Black/African/Caribbean/Black British subgroup was African.

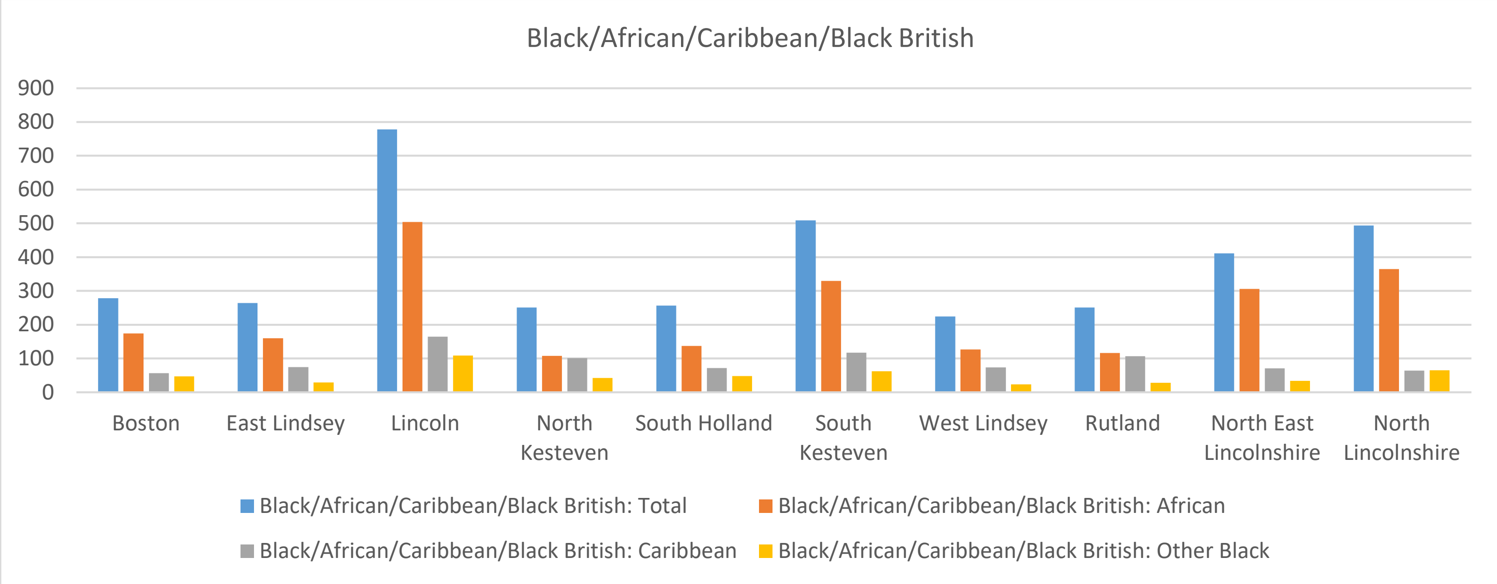


Figure 22: 2011 Population – Black/African/Caribbean/Black British

2.5.4 Mixed/Multiple Ethic Backgrounds

Across Greater Lincolnshire and Rutland, in 2011, 9,009 individuals (0.84% of the total population) described their ethnic background as "Mixed/Multiple" (see Appendix B). The largest number of these residents lived in North Lincolnshire, where they comprised 0.74% of the population. Very slightly lower numbers, combined with a smaller overall population figure in the district of Lincoln provided the district with a total of 1.31% of residents who described that they were of mixed or multiple ethnic backgrounds. Within the category of Mixed/Multiple ethnic groups, there were relatively similar figures for individuals from "White and Black Caribbean", "White and Asian", and "Other Mixed" backgrounds, and slightly lower figures for "White and Black African" individuals. Due to the diverse nature of this group, it would be difficult to draw any particular conclusions regarding implications for sport and physical activity.

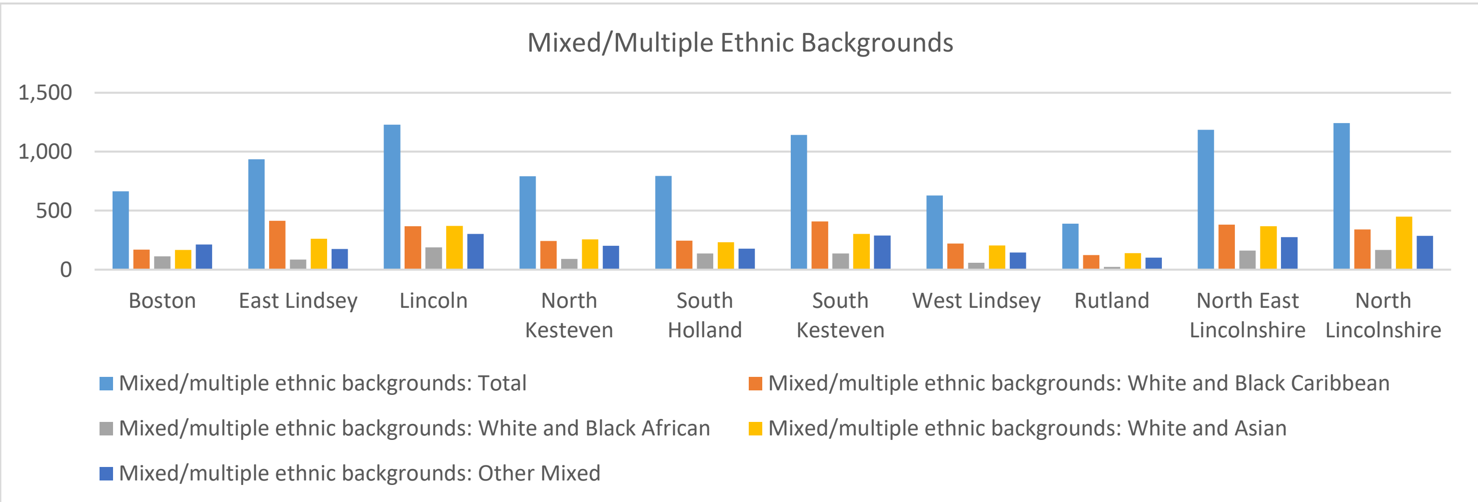


Figure 23: 2011 Population – Mixed/Multiple Ethnic Backgrounds

2.5.5 Other Ethnic Backgrounds

Individuals from "Other" ethnic backgrounds made up 1.22% of the population of Greater Lincolnshire and Rutland in 2011 (see Appendix B). This group includes Arab, of which there were 863 individuals across Greater Lincolnshire and Rutland who reported this as their ethnic group. Arab individuals made up 0.08% of the total population of the area, with the greatest numbers residing in North East Lincolnshire, Lincoln, and North Lincolnshire. In addition, other individuals who reported their ethic background as "Other" made up 0.71% of the total population, with the highest number of these individuals residing in North Lincolnshire (238 individuals) (see Figure 24).

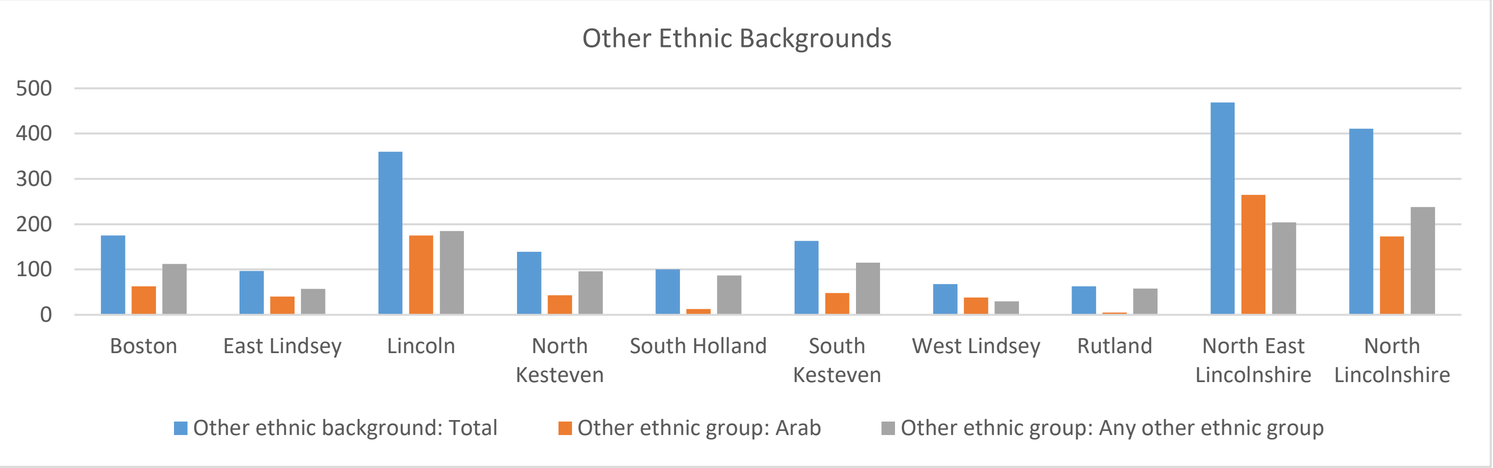


Figure 24: 2011 Population – "Other" Ethnic Backgrounds

2.5.6 Ethnicity and Sport

Governmental data on the physical activity levels of people with different ethnicities[45] shows that:

- *"from November 2019 to November 2020, 61.4% of people in England aged 16 and over were 'physically active' – they did 150 minutes or more of moderate intensity physical activity a week*
- *people of Mixed ethnicity were the most likely out of all ethnic groups to be physically active – this has remained consistent for the last 5 years*
- *people from the Asian ethnic group were less likely than average to be physically active – this has remained consistent for the last 5 years*
- *in the Black, Asian and White British ethnic groups, men were more likely to be active than women*
- *although the figures show differences between men and women in other ethnic groups, sample sizes were too small to make reliable generalisations"*.

[45] https://www.ethnicity-facts-figures.service.gov.uk/health/diet-and-exercise/physical-activity/latest

2.6 Socio-economic Factors

"*The Index of Multiple Deprivation (IMD) 2019 is the official measure of relative deprivation for small areas (or neighbourhoods) in England. The IMD ranks every small area (Lower Super Output Area) in England from 1 (most deprived) to 32,844 (least deprived). For larger areas we can look at the proportion of LSOAs within the area that lie within each decile. Decile 1 represents the most deprived 10% of LSOAs in England while decile 10 shows the least deprived 10% of LSOAs*."[46]

Data on the 2019 IMD for the Greater Lincolnshire and Rutland taken from www.gov.uk[47] show that there are more LSOAs in the most deprived 10% in England in North East Lincolnshire than in any other area of Greater Lincolnshire and Rutland. The figure is even higher in Lincolnshire as a whole. Within Lincolnshire, the district with the highest number of LSOAs in the most deprived 10% in England is East Lindsey. East Lindsey also has the highest number of LSOAs in decile 2, showing that overall, it is the most deprived area within the county of Lincolnshire. The least deprived areas overall are Rutland, North Kesteven and South Kesteven (see Figure 25).

Whilst East Lindsey is generally the most economically deprived district within Lincolnshire, some parts along the East coast are particularly deprived, including the Mablethorpe and Skegness areas. Other districts within Lincolnshire have pockets of deprivation, including Gainsborough in West Lindsey, Grantham in South Kesteven, Lincoln city and the area around Boston (as shown below).

Implications from this data include that those residents living in particularly deprived LSOAs may not have access to the funds to participate in sport and physical activity, therefore providing support to enable residents to participate for free, or at a reduced cost would be helpful.

[46] https://www.nelincsdata.net/deprivation/#/view-report/c1dae065b3324fcdb4b7531b4c5e3400/___iaFirstFeature
[47] https://www.gov.uk/government/statistics/english-indices-of-deprivation-2019

Indices of Multiple Deprivation - LSOA Deciles

Area	Decile 1	Decile 2	Decile 3	Decile 4	Decile 5	Decile 6	Decile 7	Decile 8	Decile 9	Decile 10	Grand Total
Lincolnshire	**29**	**72**	**129**	**216**	**180**	**294**	**343**	**352**	**459**	**290**	**2364**
Boston	*1*	*6*	*30*	*28*	*10*	*30*	*21*	*32*	*9*	*0*	*167*
East Lindsey	*13*	*32*	*39*	*56*	*25*	*30*	*56*	*24*	*36*	*0*	*311*
Lincoln	*10*	*18*	*21*	*20*	*25*	*36*	*42*	*48*	*27*	*0*	*247*
North Kesteven	*0*	*0*	*9*	*20*	*25*	*30*	*49*	*104*	*144*	*100*	*481*
South Holland	*0*	*2*	*9*	*44*	*40*	*66*	*49*	*32*	*36*	*0*	*278*
South Kesteven	*1*	*4*	*12*	*28*	*20*	*60*	*84*	*80*	*135*	*160*	*584*
West Lindsey	*4*	*10*	*9*	*20*	*35*	*42*	*42*	*32*	*72*	*30*	*296*
Rutland	**0**	**0**	**0**	**0**	**5**	**12**	**21**	**40**	**27**	**90**	***195***
North East Lincolnshire	**32**	**16**	**39**	**32**	**30**	**30**	**91**	**56**	**99**	**30**	***455***
North Lincolnshire	**11**	**18**	**24**	**36**	**70**	**66**	**105**	**88**	**90**	**30**	***538***
Grand Total	**72**	**106**	**192**	**284**	**285**	**402**	**560**	**536**	**675**	**440**	**3552**

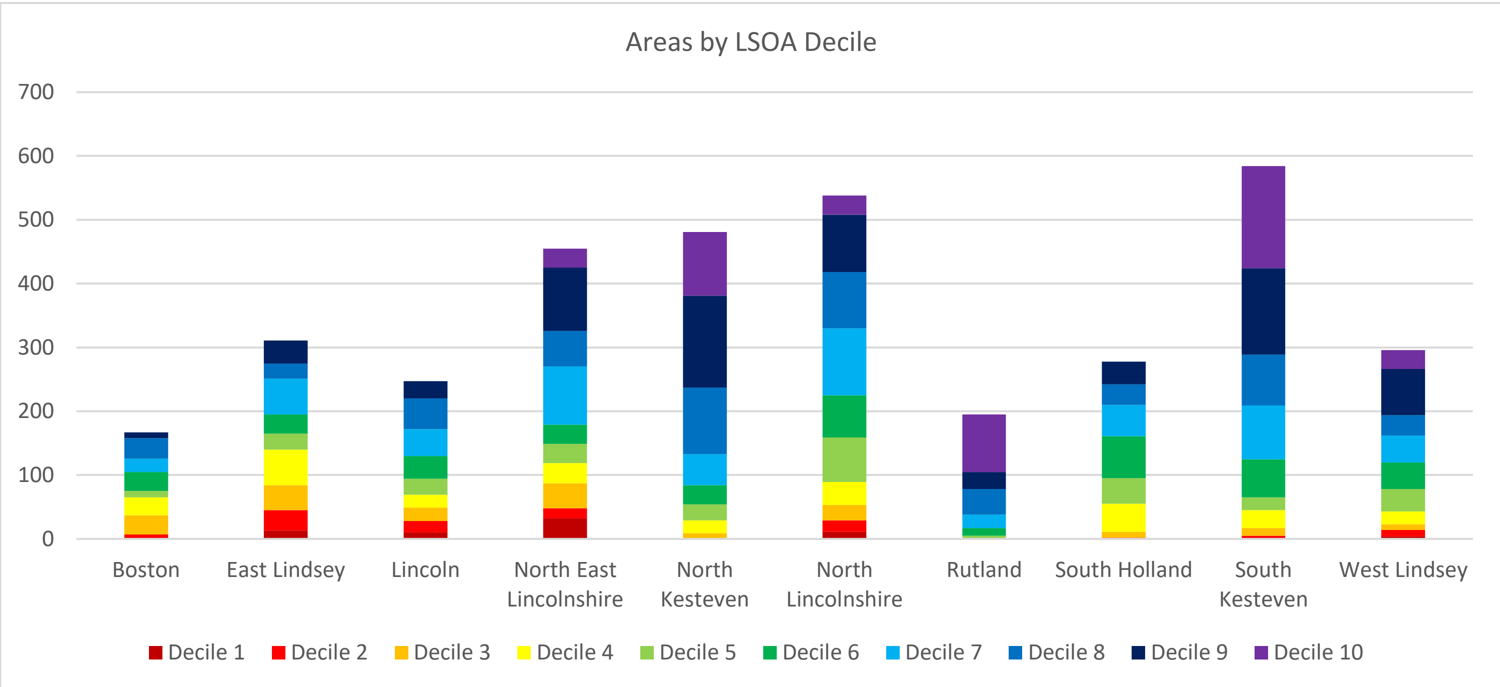


Figure 25: Indices of Multiple Deprivation - LSOA Deciles by Area

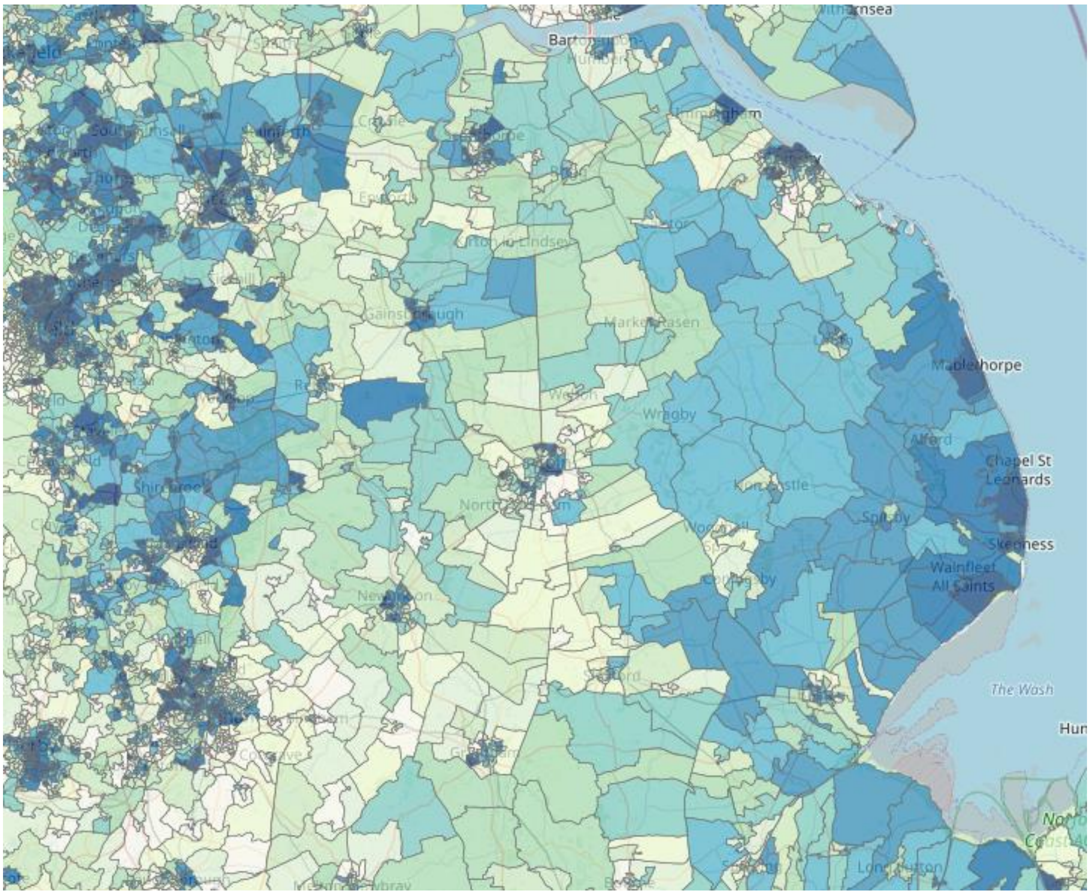


*Figure 26: Map of IMD Rank LSOAs across Greater Lincolnshire and Rutland **

*The darker blue the area, the more deprived

2.7 People living with mental health difficulties

NHS Digital Quality and Outcomes Framework 2019-20 data[48] show the numbers of GP patients who are recorded as having Depression, Dementia or Other Mental health difficulties (see Appendix C). Overall, there were 141,156 cases of mental health difficulties across these three categories in Greater Lincolnshire and Rutland (N.B. some patients may be counted twice if they have more than one diagnosis).

2.7.1 Depression

The number of patients with depression across the whole of Greater Lincolnshire and Rutland are 120,278, which is 11.88% of registered patients. The proportion of patients who have depression is the highest in North Lincolnshire at 14% of all GP registered patients. North Lincolnshire also had the greatest increase in the percentage of patients with depression based on 2018-19 and 2019-20 figures, at just over 1%. The proportion of patients with depression increased slightly in areas from 2018-19 to 2019-20.

[48] https://view.officeapps.live.com/op/view.aspx?src=https%3A%2F%2Ffiles.digital.nhs.uk%2FA8%2FCB4126%2Fqof-1920-prev-ach-pca-neu-prac.xlsx&wdOrigin=BROWSELINK

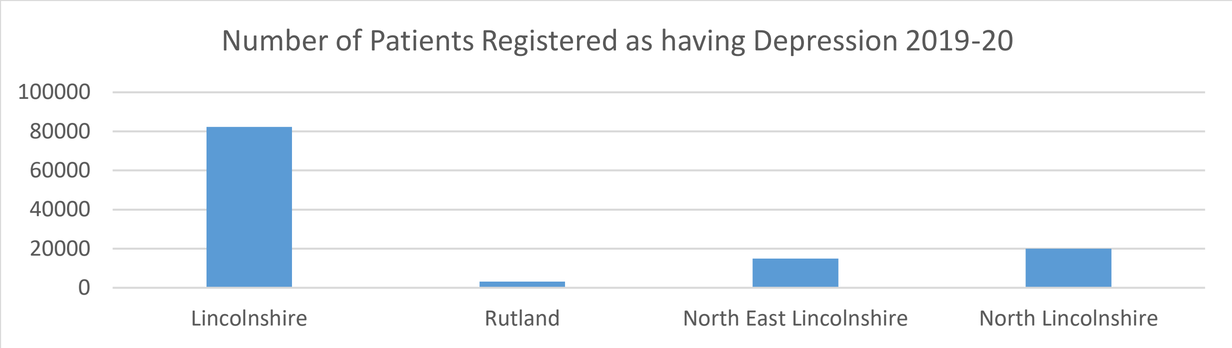


Figure 27: Number of Patients Registered as having Depression 2019-20

2.7.2 Dementia

The number of patients with dementia across the whole of Greater Lincolnshire and Rutland are 11,283 which is 0.84% of those registered. The proportion of patients who have dementia was the greatest in Lincolnshire at 0.94% of all GP registered patients (see Figure 28). Lincolnshire, North East Lincolnshire, and North Lincolnshire all had a slight increase in the proportion of patients with dementia, however there has been a very slight decrease in Rutland, which may be overly affected by the relatively low population figures in comparison to other areas.

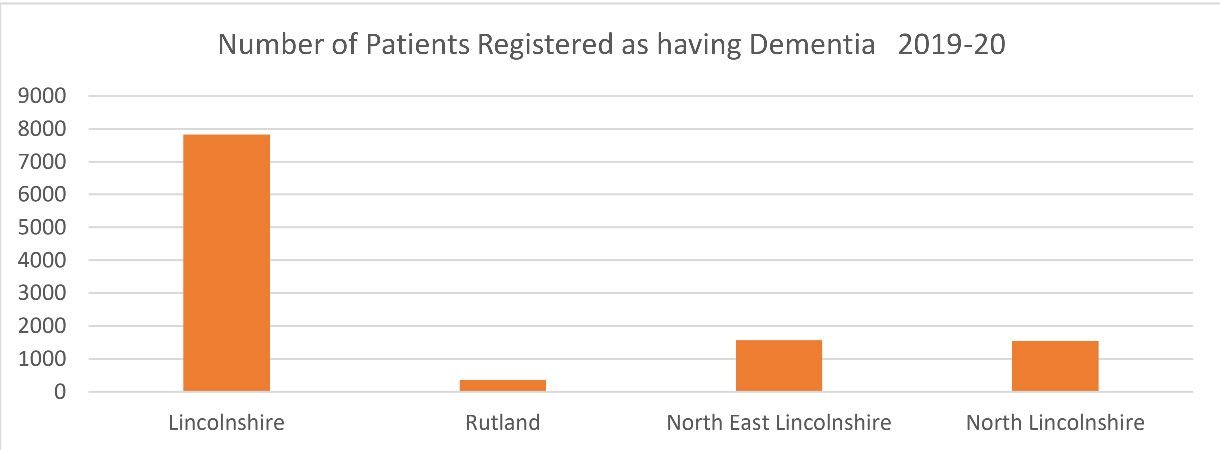


Figure 28: Number of Patients Registered as having Dementia 2019-20

2.7.3 Other Mental Health Difficulties

The number of patients with other mental health difficulties across the whole of Greater Lincolnshire and Rutland was 9,595 which is 0.81% of those registered (see Figure 29). The proportion of patients who have other mental health difficulties was the greatest in North East Lincolnshire at 1.02% of all GP registered patients. Overall, there was a slight decrease in the proportion of patients with other mental health difficulties registered between 2018-19 and 2019-20, however the proportion remained static in North Lincolnshire.

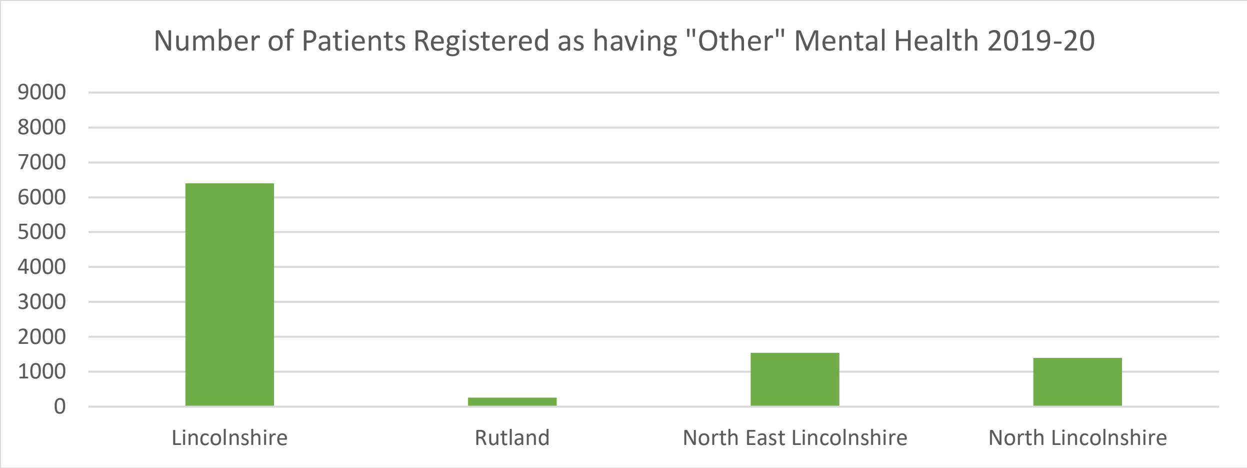


Figure 29: Number of Patients Registered as having Other Mental Health Issues 2019-20

2.8 Recommendations

As demonstrated by this chapter, the forward trends in population growth and demographics in Greater Lincolnshire and Rutland show a need for more dedicated programs that target women and girls, over-65s, members of various ethnic minorities, and people living with mental health difficulties. As such, the recommendations that are put forward are aimed at addressing these needs:

- Direct engagement with stakeholder groups, particularly ethnic and religious minorities, to better understand what they need from the Sport, Physical Activity, and Leisure sector. Examples include:
    - Engaging with local neighbourhood groups and dedicated charities.
    - Developing promotional materials in languages other than English.
    - Speaking to community leaders and asking their support in promoting various activities.
- Direct engagement with women and girls from different demographic groups to better understand the barriers to access they face. Examples include:
    - Engaging with local groups and charities.
    - Engaging with women in various spaces, such as food banks, hospitals, and schools.
    - Lobbying for programs aimed at supporting women and girls.
    - Lobbying for more programs aimed at freeing up women's time (such as childcare support, family carer support, etc.)
- The introduction of dedicated programs for people of different groups, as informed by direct stakeholder engagement. Examples include:
    - Clear communication strategies to reach selected stakeholder groups.
    - Developed formal and informal communication channels.
    - "You said, we did" – keeping stakeholders informed on how their feedback is being implemented.
    - Following up on promised changes or following up with progress updates.
- Resources, training, and support for providers to better engage with people living with mental health difficulties. Examples include:
    - Social prescribing.
    - Lobbying for more funding for dedicated training and skills development.

- Lobbying for more evidence-based training to support people with different mental health difficulties.
- Funding and support for widening participation programs. Examples include:
    - Meal and exercise clubs, as pilot-tested by Lincolnshire County Council.
    - Warm spaces and meals being offered alongside sport, physical activity, and leisure.
    - Lobbying for funded spaces on sport, physical activity, and leisure activities for eligible households.
- Support for programs aimed at over-65s. Examples could include:
    - Access support – increasing the physical accessibility of sport, physical activity, and leisure providers.
    - Funding for skills and training programs aimed at developing the workforce to work with over-65s.
    - Taking activities on the road to local community centres and small villages.

3. Chapter Three: Forward trends and behaviours that will impact the provision of sport and physical activity

3.1 Section Headlines

This section of the report concerns itself with the forward trends and behaviours that will impact the provision of sport, physical activity, and leisure in Greater Lincolnshire.

The section will start with an overview of the nation-wide trends in sport, physical activity, and leisure provision. It will then examine trends for Greater Lincolnshire and Rutland, as presented by both open data and interview data gathered for this project.

With both the national and local perspective in mind, this section will move into identifying gaps in provision and future opportunities for the sector. Those future opportunities will include: digital tools, atypical active leisure, using sport as part of a wider health strategy, early provision, and activities in community venues.

The chapter will then look at the various challenges to provision, including: the confidence and self-efficacy of citizens, the lack of coordination between providers, insufficient funding, lack of accessibility, and gaps in provision for defined groups.

Finally, the section will end with some reflections on the role of digital tools for provision, and how open data and digital skills will impact how we source and take part in activity.

3.2 Nation-wide sport and leisure trends

Data from Sport England's latest Active Lives Report (November 20-21)[49] show that 61.4% of adults in England were classed as active[50], 11.5% were classed as fairly active[51], and 27.2% were classed as inactive[52]. These levels remained somewhat stable over a 5-year period, although there appeared to be a drop in the overall population of active people in 2020 and 2021, likely corresponding with the COVID-19 lockdowns. Month-on-month data appears to confirm this, with activity picking up as restrictions eased.

In terms of demographics, the latest data from the Active Lives survey shows that men are more likely to be active than women (63% and 60% of the population surveyed, respectively); that people from more affluent backgrounds are more likely to be active than those in moderately affluent or non-affluent ones; that those aged 16-74 are significantly more likely to be active than those aged 75+ (with ages 16-34 being the most likely to be active); that those without a reported disability or long-term condition are more likely to be active than those with (66% and 45% of the population studied respectively), and that those from Mixed ethnic backgrounds and non-British white backgrounds were more likely to be active than other ethnic groups.

[49] https://sportengland-production-files.s3.eu-west-2.amazonaws.com/s3fs-public/2022-04/Active%20Lives%20Adult%20Survey%20November%2020-21%20Report.pdf?VersionId=nPU_v3jFjwG8o_xnv62FcKOdEiVmRWCb
[50] Adults who reported engaging in an average of 150+ minutes of moderate physical activity per week.
[51] Adults who reported engaging in 30 – 149 minutes of moderate physical activity per week.
[52] Adults who reported engaging in less than 30 minutes of moderate physical activity per week.

There were no significant changes noted in terms of gender, disability, ethnicity, and affluence-based demographics over time. While some fluctuations in numbers and percentages occurred, the overall ratios remained relatively stable throughout the 12 months displayed in the report. Physical activity in the 16-34 age group appeared to decline significantly over the year studied, however, compared to the 35-54 age group, which remained relatively stable over the same period of time. While activity levels were recovering among older adults, they were dropping off concerningly among younger people.

In terms of types of activity, there are several interesting trends observed over the period studied.

- By far, the greater increase was in "walking for leisure" which saw 2.4 million more people engaging with it over the period studied compared to the previous year (a 10% increase), and a 5.7 million / 24% increase compared to five years ago.
- By comparison, there was a sharp drop noted in Active Travel and Fitness Activities in 2020 and 2021 – likely due to the effects of the pandemic. Less drastic, but equally noted was a drop in swimming and team sports over the same time.
- Running and cycling for leisure appeared to experience a slight increase in popularity in 2020 before dropping off in 2021 – which is also an observation shared by participants.
- Fitness activities appear to be recovering to their pre-pandemic levels at a slower rate than team sports, for example, with the latter having more or less returned to their pre-pandemic levels and the former still not fully caught up.

In terms of behaviours observed, while perceived ability of participants has remained the same, and opportunity to engage in sport and physical activity has rallied, enjoyment in sport and physical activity appears to have decreased.

In addition to the findings of the Active Lives study, several significant changes have occurred since November 2021 that might impact the capability, opportunity, and enjoyment that participants might have of sport and physical activity:

- Inflation has increased to 8.2% at the time of this writing[53].
- The overall unemployment rate in the UK has gone down to 3.2%[54] however real earnings have decreased, despite a slight increase in nominal earnings. Job vacancies have also increased significantly.
- The Bank of England has announced a rise in interest rates, which impacts mortgages and credit for consumers.
- Quality of Life has decreased, with sport participation in particular reducing over the latest quarter.[55]

This could mean several things for the sector. Firstly, just as companies operating are all experiencing rising costs of labour and overheads, so are participants seeing a drop in disposable income, driven by stagnating wages and higher bills. Rising inflation and interest rates are likely to impact those from

[53] https://www.ons.gov.uk/economy/inflationandpriceindices/bulletins/consumerpriceinflation/latest
[54] https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/bulletins/uklabourmarket/latest
[55] https://www.ons.gov.uk/peoplepopulationandcommunity/wellbeing/bulletins/qualityoflifeintheuk/august2022

non-affluent and less-affluent backgrounds the most, making them even less likely to have the capability and opportunity to engage in sport, physical activity, and leisure.

Additionally, the decline in enjoyment in sport and physical activity might drive participants away from the sector; equally, however, there could be a great opportunity for new and interesting activities, particularly for “atypical” sport and physical activities.

3.3 Opportunities for Lincolnshire-wide innovation

This section will examine in more detail the opportunities available for companies in Lincolnshire. It will begin by looking at the rollout of digital tools, the growth of atypical active leisure, supportive activities for the healthcare sector, and the impact and importance of community centres for sport, physical activity, and active leisure.

3.3.1 Digital rollout

Over the course of the interviews, many participants noted that the first year of the pandemic saw the successful rollout of an unprecedented number of digital tools to help people engage with the sport, physical activity, and leisure sector. Examples included virtual and e-sport initiatives, but also the digitisation of services in leisure centres and gyms.

Indeed, the need for social distancing and high levels of hygiene during COVID-19 resulted in many gyms, leisure centres, and sport clubs introducing various digital tools to minimise face-to-face interactions. The rollout of self-check-in kiosks, digital bookings, and the usage of applications for people to manage and pay for their activities has resulted in a much more rapid digitisation than was anticipated for Greater Lincolnshire. And while there are some drawbacks to this rapid digital rollout, (to be discussed in the next section) there are also significant benefits to them.

What makes digital tools exciting for Greater Lincolnshire and Rutland is the opportunity to bring sport, physical activity, and leisure to individuals who, for one reason or another, cannot ordinarily access the sector. While many local charities, charitable trusts, and community interest companies offer a variety of activities depending on the needs of their community, cost, accessibility, and travel times are among some of the most common reasons why individuals do not engage with sport or leisure activities, as the next section will explore in more detail.

Additionally, digital tools offer the possibility for individuals to explore sport, physical activity, and leisure on their own terms, build up their confidence, and develop their interests. Among the participants of this research, there were providers of organised sport events who found that the wider usage of digital tools post-pandemic helped people engage in physical activity where they would not have done so face-to-face.

Case Study

Virtual Lincs

Virtual Lincs is an application launched by Lincs Inspire which provides virtual, on-demand, and live fitness classes. From their website: *"Lincs Inspire is a charitable trust – a non-profit organisation bringing leisure, sport, cultural and library services to local communities. The trust model is built around the principle that any surplus funds are ring-fenced and re-invested to support our charitable aims. Our purpose and ethos is rooted in our communities, helping to improve people's lives and wellbeing by creating more inclusive places to live, work, and visit."*

Lincs Inspire offer a variety of activities, but the Virtual Lincs application is a good example of the potential benefits and applications of digital tools for sport and physical activity:

- It allows for participants to select the level of course they feel most comfortable in.
- It allows for participants to play a video or tutorial at a speed they can follow.
- It allows for participants to tune into live classes without having to leave their home.
- It allows for participants to get practical guidance from their tutors during live classes.
- It allows for participants to replay the classes they are the most comfortable with as many times as they want.

While Virtual Lincs is just one of many applications that are available to people in Lincolnshire, it is a good example of what digital technology can do for participants, especially participants who feel unsure of where to start and how to build up the confidence they need to participate in face-to-face sport and physical activities.

Website: https://www.lincsinspire.com/virtual-lincs/

3.3.2 "Atypical" active leisure

"Atypical" active leisure existed before the COVID-19 pandemic, but participants saw an increase of interest in these activities throughout lockdown. Examples of "atypical" sport and physical activities include, but are not limited to:

- Pole fitness;
- Aerial fitness;
- Circus workshop;
- Dance classes, both traditional and ballroom;
- Silent discos;
- Comedy fitness;
- Ultimate frisbee;
- Unicycling;
- Performance arts;
- Climbing walls, gyms, parkour clubs;
- Gardening classes;
- Walks, fishing, dancing clubs;
- Diverse music;
- Performance arts;
- Burlesque;
- LARP-ing (Live Action Role Play);

The interviewees talked about the ways in which low-impact, low-stakes activities had powerful impacts on their clients. They also talked about the ways in which their clients' relationships with their bodies, and their clients' outlook on exercise altogether, started to change as a result of engaging atypical physical activities. Many expressed the view that low-stakes activities, including atypical active leisure, would make a great springboard for future, more intensive engagement with the sport and physical activity sector.

Case study

Dance Free

Dance Free is a Community Interest Company (CIC) that uses wireless headsets to organise silent discos in nature. Per their website: *"Dance Free is a free-movement activity held at varying beautiful locations in nature across Lincolnshire. It is a fun and welcoming space, everyone is welcome - anyone can participate, regardless of age, gender or ability. No experience is necessary. It is a mindful experience moving and connecting to the body through the music."*

Dance Free started up during the COVID-19 pandemic as a means of engaging people with physical activity in a relaxed, non-stressful manner. The owner used her prior knowledge about music and movement to develop and launch the silent discos, with participants joining into their own community around the activity. Currently, Dance Free is run by the owner, with help from volunteers, but they are hopeful that they will be able to grow soon.

Silent discos are an atypical physical activity, but they have significant benefits for participants. For example, participants of silent discos reported better connection with nature and appreciation for nature; better connections with their own bodies and their own feelings; improvements in mood and mental health; and the ability to improve their physical fitness.

One of the benefits that Dance Free have observed is that their activities help people that would not normally engage in dance to, in fact, start dancing. Some of the reasons given why people would not normally go to a disco or a club include, but are not limited to:

- Not feeling comfortable in disco or club settings;
- Not wanting their night out to involve alcohol;
- Feeling self-conscious when dancing;
- Not being comfortable dancing to an audience;
- Stigma around men and dancing;

The benefit of having the wireless headsets and holding the activities in nature (on a beach, in the forest, in a field) is that participants can either dance on their own, together but apart, and join the group once they have warmed up. Additionally, the silent discos allow for participants to engage with physical activity on their own terms, to the degree they feel most comfortable in. These activities were seen as a chance to relax, release stress and worry, connect with nature, and connect with other people.

Website: [Dance Free (wedancefree.com)]

3.3.3 Using sport, physical activity, and leisure as part of a wider health strategy

Alongside "atypical" sport and physical activities, the interview data showed a rise in activities that are supportive of sport and physical activities, such as chiropractic, acupuncture, body conditioning activities, and more. Furthermore, participants also spoke of their desire to work in closer collaboration with healthcare providers, to engage in dialogue and co-production.

Different participants and different companies had different groups of people that they wanted to engage with more: older people, inactive people, young people, people who might need a safe space to relax and engage in physical activity, and people with long-term health conditions. Between those who participated in the interviews and those who participated in the surveys, there was a wealth of experience and goodwill demonstrated in Greater Lincolnshire and Rutland's Sport, Physical Activity and Leisure sector.

One of the ways in which more cohesion can be achieved between providers is through social prescribing. Since before the pandemic, Social Prescribing has been taken up more in Lincolnshire, through both self-referrals and through GP services. The roles of link workers vary depending on the need of the client, but they broadly work to engage clients with their local community, help their clients find activity groups that suit their interest, help their clients get settled. Social Prescribing is, indeed, one of the activities offered by Active Lincolnshire[56].

Social prescribing link workers had a particularly important role during the pandemic in engaging with people who would not have otherwise been reached by services; in helping people identify goals they wanted to work towards; and in helping clients achieve those goals. In that regard, link workers have an especially vital role to play in the future engagement of citizens with the sport, physical activity, and leisure sector.

However, social prescribing was not the be-all-and-end-all for collaboration opportunities. Indeed, participants felt that there were many other organisations they would have loved to collaborate with, including but not limited to:

- Charities;
- Carers (professional and family);
- Support workers;
- Government bodies;
- Private sector partners;

Across the board, all participants felt the need for better, more real collaboration between stakeholders to change perceptions of public health. This increased collaboration was seen as vital for boosting physical activity at all levels, but especially for children and teenagers.

3.3.4 Early provision

Participants reflected on how important early engagement was for the sport, physical activity, and leisure sector. Many participants worked with children and teenagers, as well as their parents, in order

[56] https://www.activelincolnshire.com/what-we-do/in-health-wellbeing/social-prescribing

to support them in accessing appropriate physical activity, and thus had a lot of observations they wanted to share about the value of sport, physical activity and active leisure for the family as a whole.

The benefits of sport, physical activity, and active leisure early in life, according to participants, include: supporting emotional self-regulation, building up healthy habits, and increasing self-efficacy. The latter benefit is very pertinent in light of some of the challenges to provision, which will be discussed in the next section. Self-efficacy, or “an individual's belief in their capacity to act in the ways necessary to reach specific goals”[57] is crucial for the building up of resilience in young people, their willingness to try new things, and their ability to problem-solve.

However, participants also noted that the delivery of successful early provision also required effort, and investment, as well as the participation and cooperation of parents. Indeed, parental support was seen as especially important given the amount of time, travel, and money needed for children to engage in certain sport and physical activity. Many participants noted that provision was not evenly distributed across the county, and children interested in pursuing more intensive sporting careers would have to travel even further to access elite coaches.

Nevertheless, participants were optimistic about the opportunities for early provision of sport and physical activity and felt that they could be combined with other community projects to engage the entire family together.

3.3.5 Activities in community venues

Some of the participants in this research project discussed the ways in which leisure activities are being taken more into the community. Indeed, those participants felt that some of the most impactful, influential events that could increase physical activity levels were the ones that happened on people’s doorstep.

One notable example given were running events – Lincoln Half Marathon, Park Runs, Fun Runs – which can be organised to take the event right past people’s doorsteps. These events, as explained by a representative of Curly’s Athletes, can be both big and small, local and regional, and serve to increase aspiration and passion among local residents.

Additionally, Lincolnshire is known for its Steampunk culture, with the Asylum Steampunk Festivals[58] providing annual opportunities for leisure as well as physical activities (Dances, Performances, Parades, Walking tours, Penny-farthing bicycle rides, etc.)

Indeed, an emphasis was placed in interviews on the impact of small, local events. Those events were seen as most effective when they were tailored to the needs of the local community, and aimed at addressing specific problems (lack of self-efficacy, lack of motivation, poor activity levels, poor engagement among women and girls.) Participants brought up the importance of role models – not just in terms of famous people, but also in showing that “people like me” can do a specific sport or physical activity.

[57] Self-Efficacy Teaching Tip Sheet (apa.org)
[58] https://www.asylumsteampunk.co.uk/asylum-steampunk-festival/

Community centres and village halls came up frequently in the interviews as an untapped resource. Participants who were trustees and board members told stories of how they came into the role by virtue of necessity – the village was about to lose its library, or there was not enough support to keep their local swimming pool open, or they wanted to make sure there was still a space for local residents to meet and socialise.

Community centres and village halls offer a cost-effective way for local residents to engage in sport and physical activity such as judo club, drama club, cheer group, keep fit, tai chi, bands/local discos. Additionally, they also offer various activities that serve to promote community spirit, such as "Live and Local"[59], coffee morning, and fundraising. These spaces are very well-placed for supporting families, elderly-residents, and under-served communities, for both leisure and volunteering, and can be vastly more budget-friendly than larger leisure centres.

Case Study

Village Halls and Community Hubs

Crowland Community Hall is an example of the opportunities for both provision of activities and upskilling that could occur in community hubs and village halls across Greater Lincolnshire and Rutland. The organisation was founded as a measure for the local community to preserve their library, and create a more robust, more responsive offer in response to the needs of their community.

As described by the trustees of Crowland Community Hall, the organisation's goal is the "*advancement of education for the benefit of the public in Crowland and the surrounding areas by the provision of library services; To further or benefit the residents of Crowland and the surrounding areas (…) in a common effort to advance education and to provide facilities in the interests of social welfare for recreation and leisure time occupation with the objective of improving the conditions of life for the residents.*"

Crowland Community Hall took advantage of the pandemic to renovate and make their building more accessible to the public. It was a good example of a local provider who was able to make the most of a difficult situation by taking the forced downtime of the pandemic as an opportunity to expand on their services, signpost them better to the public, and increase visibility for local activities.

In terms of support offered to the community, Crowland Community Hall offers a library, a space of hobby groups, craft, Judo, Tai Chi, and local music. They are also a cost-effective alternative for events, weddings, birthday parties, and christenings.

Website: [Crowland Hub]

[59] Home : Live & Local (liveandlocal.org.uk)

However, community centres are also often overlooked in terms of funding and support because of the sizes of their operations, which is something that will be discussed in more detail in the next section.

3.4 Challenges for provision

Having examined some of the opportunities for sport and physical activity in Greater Lincolnshire and Rutland, this section will turn to challenges to provision. As identified by survey respondents and by interview participants, the main themes of this section are as follows: Confidence and self-efficacy (the role of mental health for participants), the lack of co-ordination between providers and commissioners, accessibility challenges, cost and funding challenges, and the gaps in provision for defined groups.

3.4.1 Confidence and self-efficacy

When examining the results of the survey, respondents noted that from their perspective, the biggest barriers towards engagement with the sector were self-efficacy, motivation, and confidence on the part of individuals. By contrast, respondents did not consider safety or lack of confidence in the providers themselves to be a barrier to engagement, as seen in the figure below:

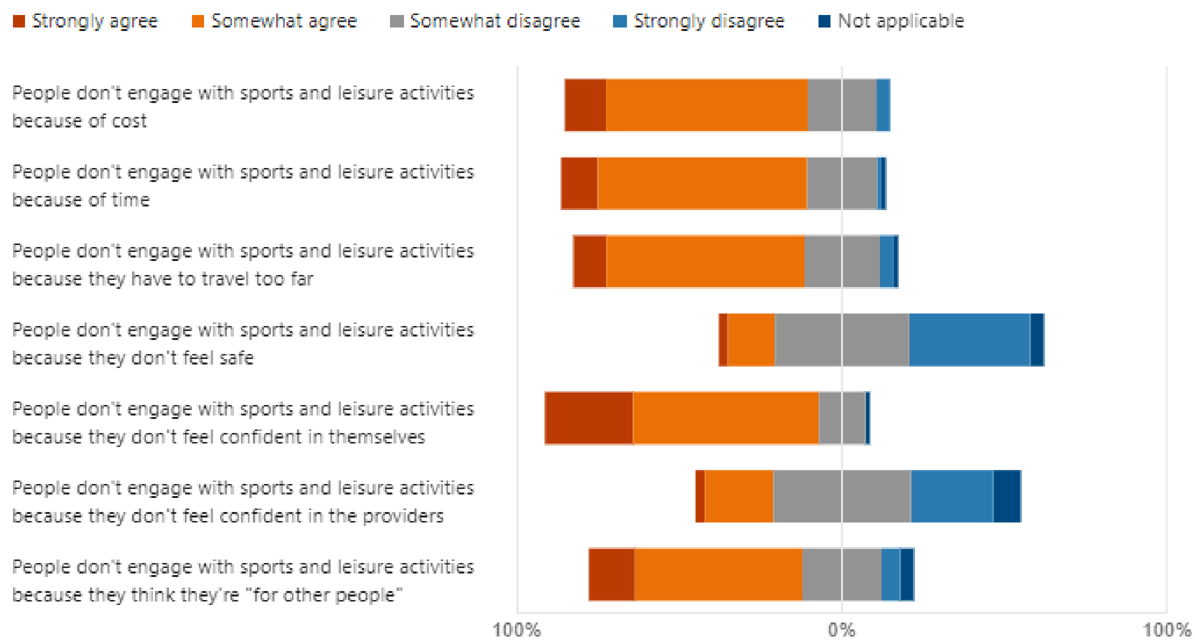


Figure 30: Survey Question 13: To what extent do you agree with the following statements about motivations to be engaged in physical activity?

Some respondents took the opportunity to expand further on their answers, commenting about the role of motivation and seeing your peers engage in physical activity. Noteworthy themes in the answers included:

- People form their attitudes toward physical exercise early on and are less likely to change them as adults without significant influence from their peer group.

- Certain activities have a reputation for being for "certain kinds of people" which presents a significant barrier to entry.
- Volunteering would be a great route to physical activity for inactive people, because it helps build up their confidence and self-esteem.

"Confidence is an issue but so is motivation and self-esteem. Volunteering would be a good route to improving numbers of active [sic] people. Plus, more cycles in the community at affordable prices, access to swimming pools and moving away from 'stuffy and clicky' walk groups and towards more exciting activities. Gardening is a great way for over 55's to get more active."

- *Survey respondent, Charity*

Respondents also noted that, to some degree, there will always be people who make the conscious choice not to engage in exercise or physical activity, regardless of how much information and public messaging there is out there, or how effectively it is shared with them. That is not to suggest there is no point in information sharing or active campaigning, but it does demonstrate a "pick your battles" kind of outlook among the community interest companies, charities, and other voluntary organisations in the sector.

Participants did not all display a laissez-faire approach. Some expressed the view that the sector can do more to educate citizens about the benefits of physical health, invest more in programs for the young, invest more in elite coaching, and take a more proactive approach about reaching out to under-served groups. There were also views expressed among some participants that employers and campaigners should not be afraid to take a harder line with citizens, adopting similar tactics for promoting physical activity as anti-tobacco campaigns.

The latter view – that harder tactics should be adopted when trying to reach inactive populations – is espoused by some nation-wide health campaigns and can be seen in various proposals, such as the idea of changing food packaging to reflect how much exercise it takes to burn off the calories. However, experts seem divided on the impact of such tactics[60] and campaigners have raised concerns that certain tactics risk exacerbating or triggering disordered eating behaviours in vulnerable populations[61]. This report will go more into depth about the impact of the pandemic on mental health and on those living with eating disorders, but it is worth noting that the population susceptible to engage in disordered eating and over-exercise is often overlooked when health and exercise campaigns are crafted.

Interview participants noted that many of the interventions needed to help citizens with their confidence, mental health, and self-efficacy are expensive, and resources are limited. Some participants noted that in some areas, men are more active than women; whereas in other areas like North East Lincolnshire, that trend was inversed. A combination of national and local approaches are needed, as well as a community element to the provision.

Equally, participants acknowledged the importance of habit-building and enjoyment for the success of any intervention. There was an understanding that mental health and mental health first aid had to

[60] Why food labels showing the exercise needed to burn off calories won't work for everyone (theconversation.com)
[61] 'Exercise targets would trigger my eating disorder' - BBC News

be embedded into practice in order to help people put the "should" into action. Participants noted that understanding healthy guidelines and putting them into practice were two different challenges, and that a welcoming environment, organic engagement, and strong leadership were as crucial to people's long-term success as any other factor.

Lastly, participants also discussed the importance of a joined-up approach in helping citizens achieve their goals. The lack of co-ordination and the tendency for organisations to work in silos was identified as a major challenge to provision, which is what the next section will focus on.

3.4.2 Lack of coordination

One of the main concerns raised by participants was the lack of coordination between providers of sport, physical activity, and leisure activities, and commissioners from the local authorities. Given the size of the county, and the number of micro companies in the sector, it is worth asking to what extent coordination and cooperation is possible; nevertheless, one of the concerns that the participants expressed was that there was simply not enough information about what was available, for whom, and how different people could access it.

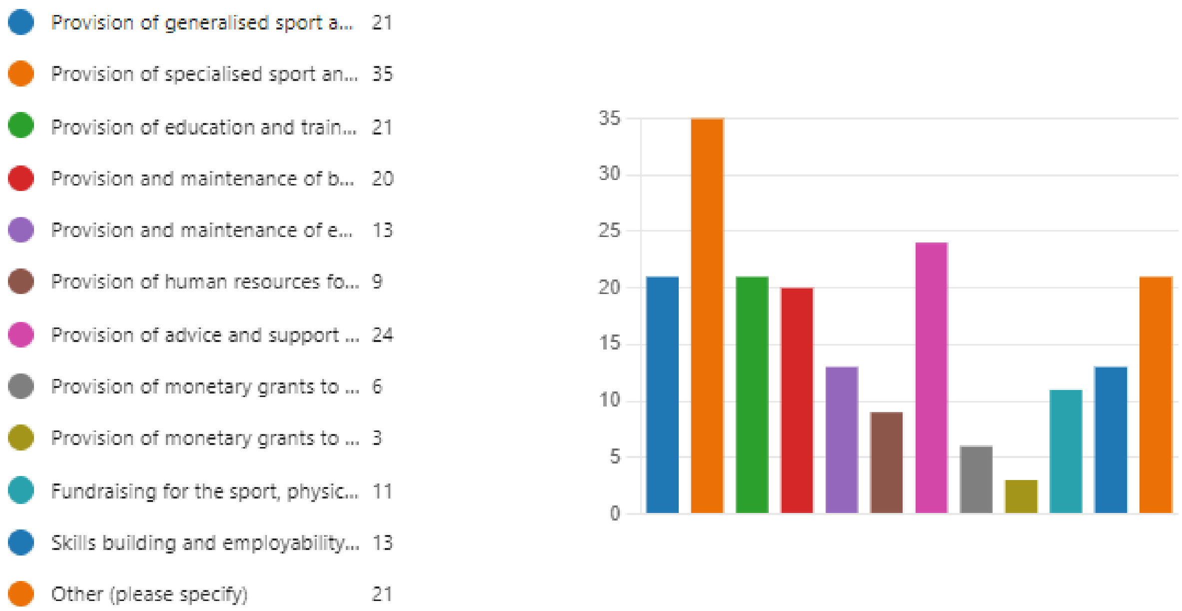


Figure 31: Survey Question 8: Please describe the activities of your company

Both open data and survey data suggest that most charities and voluntary sector organisations offer a mixture of services – from buildings and open spaces to human resources, advice and support. Almost half of the respondents up to 30/08/2022 also used the opportunity provided to give further details about the activities of their charity, trust, or voluntary organisation, listing activities such as:

- Opportunities for civic engagement.
- Providing support to veterans and ex-servicemen.
- Provision of academic and non-academic learning.
- Provision of a public library.

- Provision of IT equipment, and more.

However, there appears to be no coordination between providers in terms of what is being offered, what is being commissioned, and for what purposes. Rather, it appears that different community interest companies, charitable trusts, and voluntary organisations provide whatever their local community needs at any given point.

To some extent (possibly due to accessibility, demographics and distance) many of the respondents noted later in the survey that their members would take advantage of certain sport, physical activity, and leisure options if they were available to them – but it is also worth noting that many mission statements of the smaller voluntary organisations in Greater Lincolnshire and Rutland focus on providing a local service.

However, another reason for this lack of co-ordinated approach, according to interview participants, was the lack of support from healthcare providers, medical practitioners, and other stakeholders. To some extent, participants felt that this was due to different organisational cultures, but they also observed that even within the same profession, different people had different views about the role of exercise in people's health. One participant talked about how they felt that younger doctors tended to prescribe physical activity for mental health more, whereas others were perceived as discouraging their patients from engaging in physical activity at all.

Participants also expressed the sentiment that there had to be "more doing" and "less talking" on everyone's part to address low activity levels in the population. Examples of how that might be done included, but were not limited to sharing success stories, sharing what works, having integrated healthcare systems, stopping with the duplication of activities, having a more proactive approach towards planning and investment, and having a very clear understanding of what "collaboration" means. It was felt by some participants that a more considered approach towards business planning might be beneficial for joined up working, as having more competition did not always result in better services for citizens. This could mean more business support, more consultation with smaller providers, and more strategy applied to planning.

Finally, data from both survey and interviews showed that many smaller providers felt overlooked and left behind when the conversation turned to funding and general business support. Interviewees described all the ways in which their organisation could have grown, both in employment and in provision, if they were simply given the support they needed to improve their facilities and bring more elite coaches onboard. People who sat on the board of trustees in charities and in community halls felt that they would benefit a lot from having more professionals on the board, or at least having access to professionals who were savvy in business matters. Unfortunately, many small providers felt they could not afford such support, and they did not have access to the funding to do it either.

3.4.3 Insufficient funding

After confidence, motivation, and self-efficacy were accounted for, cost and accessibility were the next most common deterrents for individuals to engage in the sector. The issue of cost is expected to persist and increase in severity, as household budgets become more and more constrained. Indeed, as one survey respondent noted:

With the constant news of cost of living increase we have seen a dramatic increase of cancellations stating they can no longer afford to maintain a membership.

- *Survey respondent, Community Interest Company*

However, cost is also a challenge that providers cited a lot when asked about the biggest current barriers to them delivering new services. Throughout the interviews, it was generally agreed that everyone could do with more advice on getting funding, particularly those who worked in charities and community venues. Many interviewees from that sector talked about how effective they had been in the past in delivering services quickly, to budget, and stretching out limited resources. The lack of access to large pots of money encouraged boards of trustees to be creative in budgeting and fundraising, which allowed them to weather many difficult periods.

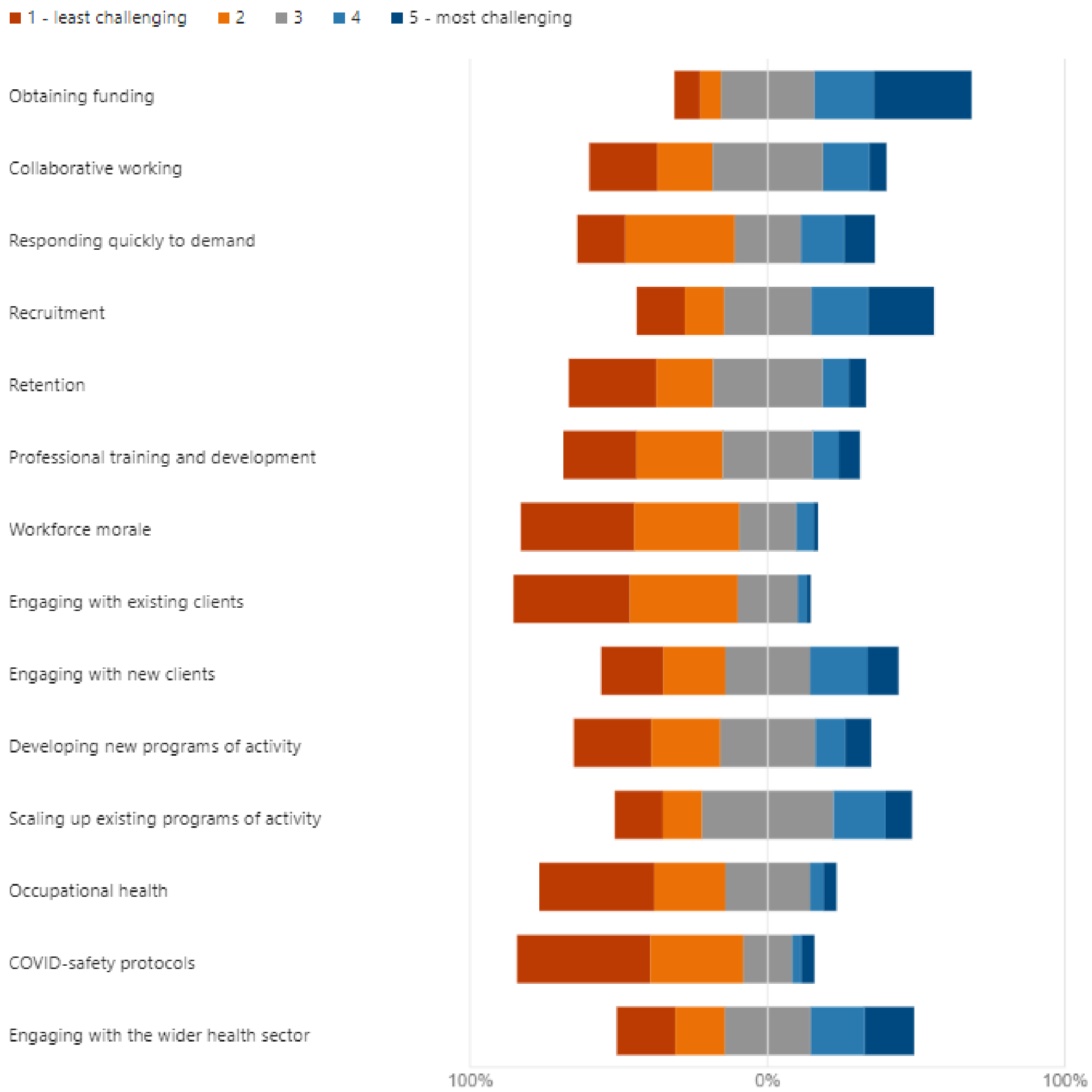


Figure 32: Survey question number 15: To what extent are the following a challenge to your organisation?

At the same time, participants noted that many organisations who didn't need support with funding in the past had to look for alternative ways to pay the bills now. This will be discussed in more detail in the section on COVID-19 and the Cost-of-Living crisis, but many interviewees gave examples of how their charity or community interest company had to make sacrifices or change their ways of working in response to the rising costs of fuel and utilities. One charity talked about how reluctant they were to put up the prices for venue hire because they didn't want to put off their regulars. They understood that they were effectively subsidising those groups to encourage them to continue to use those spaces, but they didn't want to pass off the rising cost of utilities on to the end customer for as long as they could. This was understood not to be a sustainable decision in the long run, and underscored the importance of more support for small providers.

3.4.4 Lack of accessibility

As seen from section 3.4.1, over 50% of respondents somewhat agree and 19.2% strongly agree that people do not engage in sport and leisure activities because of cost, while 11.5% strongly agree and 65.4% somewhat agree that people do not engage in sport or leisure activities because of time. 15.4% strongly agree and 53.8% somewhat agree that people do not engage in sport or leisure activities because of the distance they have to travel.

These findings were consistent with open data for Lincolnshire, which shows the distribution of provision across the county. While at first glance, the map of different charities, societies, and for-profit companies in the sector suggests an even distribution of services, once the query is limited to sport and leisure provision, it reveals that most companies offering sport, physical activity, and leisure as their primary activity appear clustered around specific areas and large tourist centres, making them less accessible to those living in rural settings, and those with limited transport links.

That is not to say that people are not willing to go the distance and cost in order to engage in sport and physical activity – as evidenced by section 3.4.1, participants were of the opinion that, given sufficient motivation, people would travel in order to engage in sport and physical activity.

> *(M)any of our members would go swimming if we had a pool near us. Some of our members do have cars so can travel many miles. Some of our members engage in various group physical activity groups according to their ability.*
>
> - *Survey respondent, Charity*

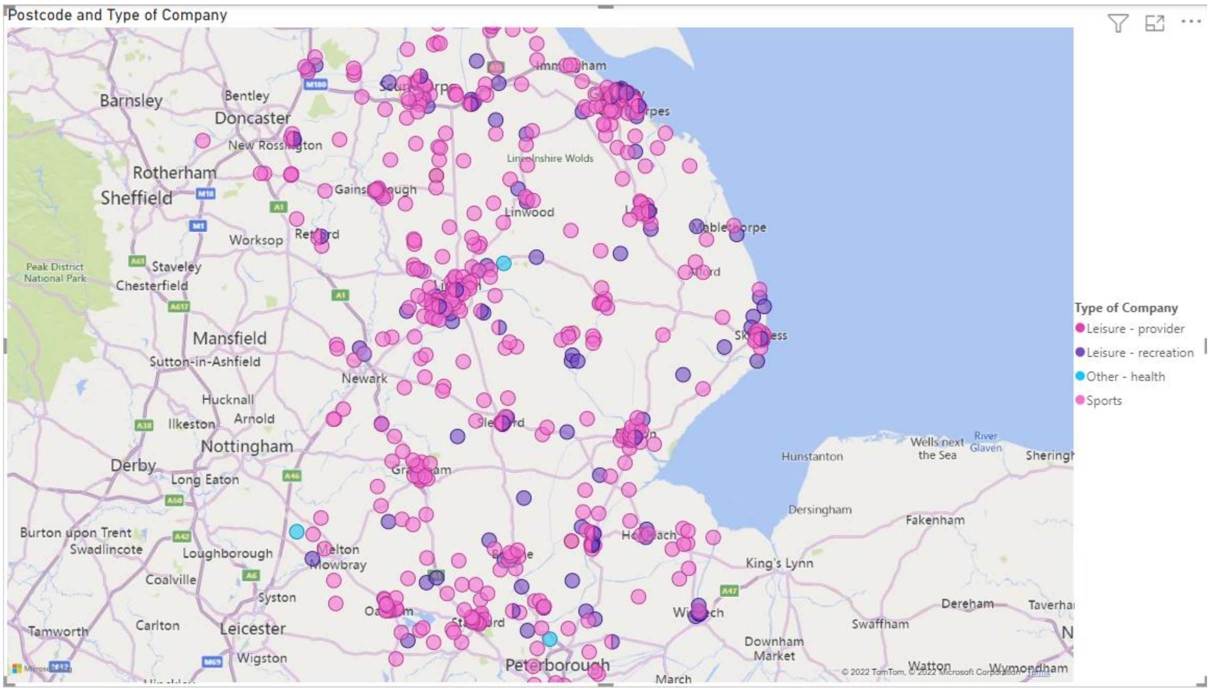


Figure 33: Distribution of Leisure providers across Greater Lincolnshire and Rutland

At the same time, interviewees noted that depending on location, citizens might simply not have the time to engage in sport and physical activity. One example given was of shift patterns in certain industries, as they were seen as not being ideal for active lives. This is particularly relevant for Greater Lincolnshire and Rutland, where 21% of the population in employment works for 45 hours or more per week.

	Greater Lincolnshire and Rutland	
	number	%
T17:1 (Under 10 : All people)	18,800	4%
T17:2 (Under 10 : Male)	4,200	2%
T17:3 (Under 10 : Female)	14,100	6%
T17:4 (10 to 34 : All people)	160,000	31%
T17:5 (10 to 34 : Male)	41,100	15%
T17:6 (10 to 34 : Female)	118,900	47%
T17:7 (35 to 44 : All people)	233,700	45%
T17:8 (35 to 44 : Male)	142,900	53%
T17:9 (35 to 44 : Female)	90,800	36%
T17:10 (45 hours plus : All people)	110,200	21%
T17:11 (45 hours plus : Male)	80,800	30%
T17:12 (45 hours plus : Female)	29,400	12%

Figure 34: Hours worked Greater Lincolnshire and Rutland, 12 months to Q2 22[62]

[62] Annual Population Survey, NOMIS Nomis - Official Census and Labour Market Statistics - Nomis - Official Census and Labour Market Statistics (nomisweb.co.uk)

Throughout all the interviews, the importance of creating fun, accessible exercise, and encouraging movement was emphasised. However, it was also agreed that a one-size-fits all provision wasn't ideal – different groups need different support.

3.4.5 Gaps in provision for defined groups

As seen from Section 2: Forward Trends in Population Growth and Demographics, there are several groups in Greater Lincolnshire and Rutland for whom engagement with sport, physical activity, and leisure presents higher barriers than for others. Additionally, as seen in section 3.2, many of the groups that struggle to engage with sport on a national scale are very highly represented in Greater Lincolnshire – older people, ethnic minorities, people with disabilities and long-term conditions, and people living in non-affluent areas.

3.4.5.1 Cultural and Religious considerations

Culture and religion, in addition to ethnicity may be relevant factors to consider when establishing/promoting sports. After Christianity, the largest religions in the UK as per the 2011 census were, in order: Islam, Hinduism, Sikhism, Judaism and Buddhism[63].

Sport England[64] have found that participation in sport and physical activity is higher among some faith groups than others, for example "*amongst those practising a religion, those of a Buddhist, Christian, Jewish or Sikh faith are more likely to be physically active. In contrast, activity levels are lowest amongst those who practise Islam*."[65].

Sporting Equals[66] is an organisation that promotes ethnic diversity in sport and physical activity which may be able to provide advice and guidance relating to the engagement of people from various ethnic, cultural and religious backgrounds in sport and physical activity. Upon registration with them it is possible to download various reports relevant to equality and diversity in sport. Lincolnshire-based organisations Centre for Reconciliation[67] and JUST Lincolnshire[68] may also be able to provide support and advice regarding religion and cultural matters locally relating to sport.

Network Steet Games[69] provide a guide to engaging females from BME communities and different cultural backgrounds[70] in sport. They describe important factors to consider as including:

- Female only sessions.
- Female exclusive environments.
- A relaxed clothing policy which is well publicised.
- Parental approval and building relationships.
- Understanding of the Faith calendar.
- Using faith centres to host activities.

[63]https://en.wikipedia.org/wiki/Religion_in_the_United_Kingdom#:~:text=Eurostat%27s%20Eurobarometer%20survey%20in,9.9%25%20Anti%2Dtheists).
[64] https://www.sportengland.org/
[65] https://www.sportengland.org/know-your-audience/demographic-knowledge/faith-groups
[66] http://www.sportingequals.org.uk/research-and-advice/research/
[67] https://tcf-reconciliation.org/
[68] https://www.justlincolnshire.org.uk/
[69] https://network.streetgames.org/
[70] https://network.streetgames.org/sites/default/files/Us%20Girls%20How%20To%20Guides%20BME%20Reduced.pdf

Islam

The Muslim Sports Foundation[71], the Muslim Association of Great Britain[72] the Muslim Women in Sport Network[73] and the Women in Sport's Insight pack[74] may be able to provide guidance on the promotion of physical activity within the Muslim community of Greater Lincolnshire and Rutland. Some key recommendations from the Women in Sport Insight Pack in relation to engaging Muslim Women and girls in sport include:

- *"**Promotion**: Use **relatable role models** and people within the local Muslim community to promote sports opportunities. Using images of Muslim women and girls participating in sport in promotional materials can increase awareness of the possibilities, as long as you have permission from participants to use these images. Include relevant information that will put participants at ease, such as that sessions **are led by a female coach in a private space**. This will provide reassurance that the needs of Muslim girls and women have been considered and met.*
- ***Sport in schools**: Consult with girls and their parents to ensure that the right steps are taken to be **inclusive and responsive** to the specific needs of Muslim girls.*
- *Enable Muslim girls to **wear clothes they feel comfortable in**. This removes the potential barrier that adhering to Islam dress protocols presents.*
- ***Be aware of holidays** such as Ramadan, when rituals such as fasting might impact the ability of Muslim students to participate in P.E. and other physical activities.*
- ***Enable privacy**, such as private areas for changing in changing rooms and separated showers".*

Hinduism

Hindu Matters in Britain[75],[76] and the Hindu Council UK[77] may provide guidance on engaging Hindu communities in sports and physical activities.

Sikhism

Guidance on engaging Sikh communities in sports and physical activities may be found from Sikh Sport[78], who "*promote sport positively with families, youth and communities whilst increasing the awareness of important Sikh values*". Other information may be obtained from Network of Sikh Organisations[79] and from the British Sikh Report 2020[80], a report "*created by Sikhs about Sikhs, and for everyone with an interest in the lives of Sikhs in Britain*".

Judaism

US based, Jewish Sports Now[81] may be able to provide guidance regarding the engagement of Jewish communities in sport. Other sources of information may include the sports pages of Jewish News, the UK's biggest Jewish newspaper[82].

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[71] https://muslimsportsfoundation.org.uk/
[72] https://www.mabonline.net/muslims-in-sports/
[73] https://mwisn.org/about-us/
[74] https://www.womeninsport.org/wp-content/uploads/2019/12/Muslim-Women-and-Girls-Insight-Pack-FINAL.pdf
[75] www.hindumattersinbritain.co.uk
[76] https://www.hindumattersinbritain.co.uk/Page/sports
[77] http://www.hinducounciluk.org/
[78] https://www.sikhsport.co.uk/
[79] https://nsouk.co.uk/
[80] https://britishsikhreport.org/wp-content/uploads/2020/11/British-Sikh-Report-2020.pdf
[81] https://jewishsportsnow.com/
[82] https://www.jewishnews.co.uk/topic/sport/

Buddhism

The Buddhist Society[83] may be able to provide guidance regarding the engagement of Buddhist communities in sport.

3.4.5.2 Gaps in provision for people with mental health difficulties

Mental health was a considerable topic of conversation, particularly after the pandemic. More time will be spent discussing the impact of COVID-19 on the mental health of individuals, but there is one gap in provision that is particularly relevant to the sport, physical activity, and leisure sector. That gap being provision for those who suffer with eating disorders and other adjacent mental health conditions.

Data on eating disorders is limited, especially on the regional level, and getting treatment has historically been very difficult. Research published by the charity B-Eat in 2017 also showed how long waiting times are for individuals with suspected or confirmed eating disorders to receive specialist treatment pre-pandemic[84] - post-COVID, those waiting times are likely to increase.

What this means for the sport, physical activity, and leisure sector is that there are significant opportunities for new, innovative interventions, delivered to those who need it most. However, it also means that the sector must be very mindful of its messaging and the way it approaches working with "atypical" clients, regardless of whether they are children or adults. In recent years, a big focus of the UK's public health strategy has been obesity and childhood obesity. Yet, eating disorders are, by and large, a hidden problem, and that even people out of treatment might relapse into destructive behaviours under the wrong conditions.

Additionally, it is worth noting that while sport and physical activity are shown to improve the symptoms of certain mood affective disorders (such as depression) and certain neurotic, stress-related and somatoform disorders (such as generalised anxiety), certain conditions can overlap and exacerbate one another, which further emphasises the need for comprehensive mental health education and mental health first aid training within the sector. Indeed, as some of the participants note, mental health education and mental health first aid are being introduced more and more as part of the training of staff, but it is important to remember that unless a client comes out and says what they are struggling with, it is impossible to know what might be going on in their lives. The experiences that clients have will determine whether they are likely to return to a leisure centre or continue with a new sport or physical activity, so that kind of education and training, arguably, deserves to be prioritised.

This is even more the case for provision aimed at people with multiple and complex needs, physical disabilities, and long-term conditions.

[83] https://www.thebuddhistsociety.org/
[84] https://beat.contentfiles.net/media/documents/delaying-for-years-denied-for-months.pdf

3.4.5.3 Gaps in provision for people with disabilities and multiple and complex needs

Data on people living with disabilities have been taken from NOMIS[85] data on individuals in receipt of disability benefits. As such, these data are likely to provide a conservative estimate of the number of people living with disabilities in the Greater Lincolnshire and Rutland area, as there may be also those who are disabled, but not eligible for disability benefits; those who do not realise they are eligible and have not made a claim; and those with disabilities who do not wish to make a claim.

Data are provided for the period of November 2018, as beyond this date, this data collection has been discontinued. This shows that as of 2018, there were a total of 31,000 people in receipt of disability related benefits across the whole of Lincolnshire and Rutland, with the greatest number in Lincolnshire, and the fewest in Rutland.

A breakdown of the data by gender shows that there are slightly higher numbers of male than female claimants in all four areas, with an average of 54% claimants across the Greater Lincolnshire and Rutland area being male.

A breakdown by age shows that in each area there are more claimants who are aged 65 and over than there are of children under 16, or of 16-64 year olds. This difference is particularly pronounced in Lincolnshire where there were 9,310 claimants who were aged 65+, compared to 6,040 under 16s, and only 5,500 aged 16-64.

By exploring age and gender across each area (as shown below), it can be seen that in all four areas there are more male claimants in the Under 16 and 16-64 age categories, but more females in the 65+ age group. This suggests that currently older women are more likely to be recorded as having disabilities, however it is likely that this may change over the next few years, as younger men (who are currently more likely to be recorded as having disabilities) move into older age groups.

People Living with Disabilities in Greater Lincolnshire and Rutland

Area	Under 16*	16-64*	65+*	Calculated Total*	Total provided by NOMIS
Lincolnshire Total	**6040**	**5500**	**9310**	**20850**	**20860**
Lincolnshire Men	4200	2890	4300	11390	11410
Lincolnshire Women	1840	2610	5010	9460	9460
Rutland Total	**170**	**120**	**200**	**490**	**550**
Rutland Men	120	80	80	280	300
Rutland Women	50	40	120	210	250
North East Lincolnshire	**1180**	**1610**	**1880**	**4670**	**4720**
North East Lincs Men	820	880	880	2580	2570
North East Lincs Women	360	730	1000	2090	2150
North Lincolnshire	**1170**	**1620**	**2060**	**4850**	**4870**
North Lincs Men	800	840	890	2530	2540
North Lincs Women	370	780	1170	2320	2320

[85] https://www.nomisweb.co.uk/query/construct/summary.asp?mode=construct&version=0&dataset=115

*These figures show totals calculated using the raw data provided by NOMIS in order to provide a breakdown of claimants by age and gender. As these do not take into account "negligible" returns which are anonymised at a granular level, the totals may not exactly match with totals reported by NOMIS but have been provided here for transparency.

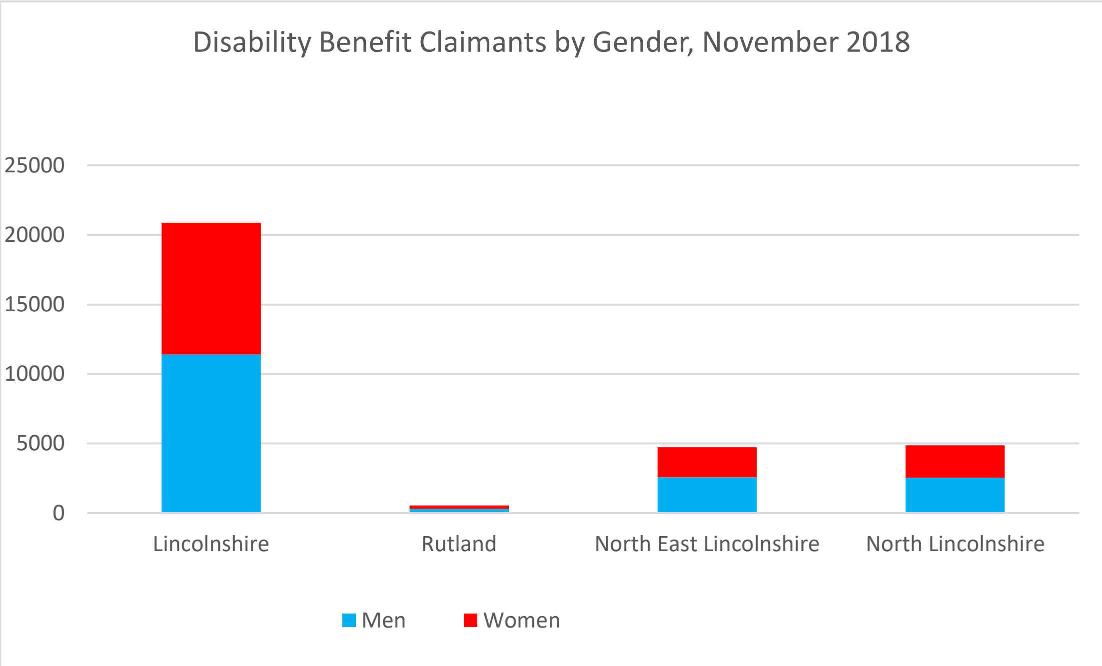

Figure 35: Disability Benefit Claimants by Gender

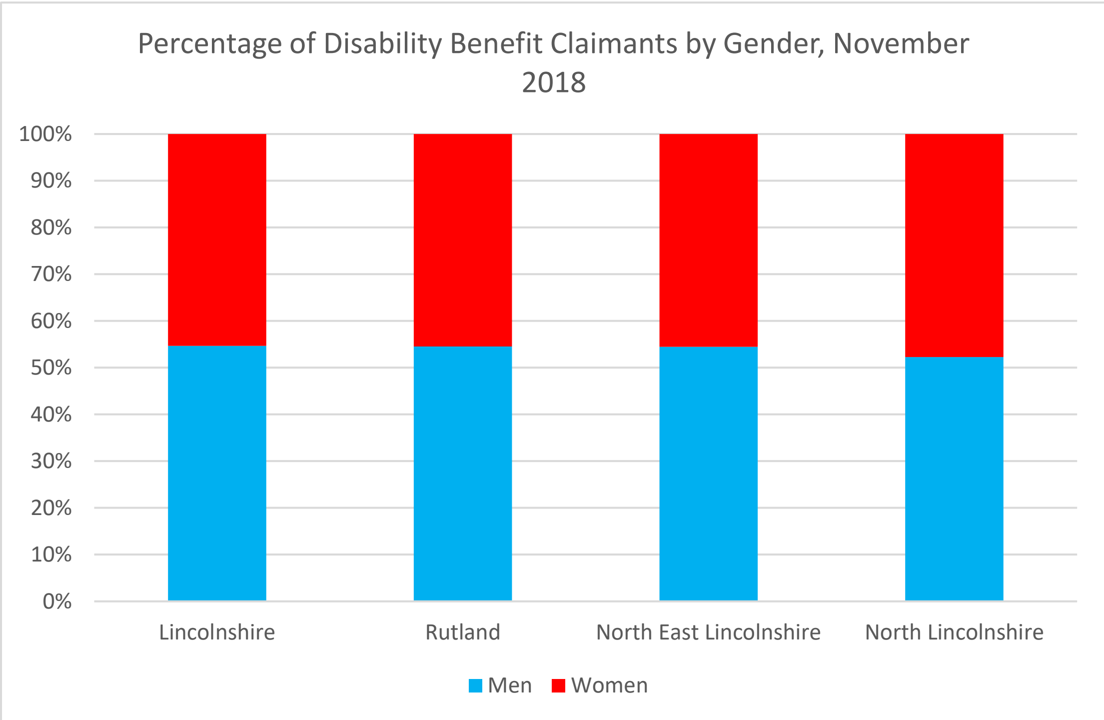

Figure 36: Percentage of Disability Benefit Claimants by Gender, November 2018

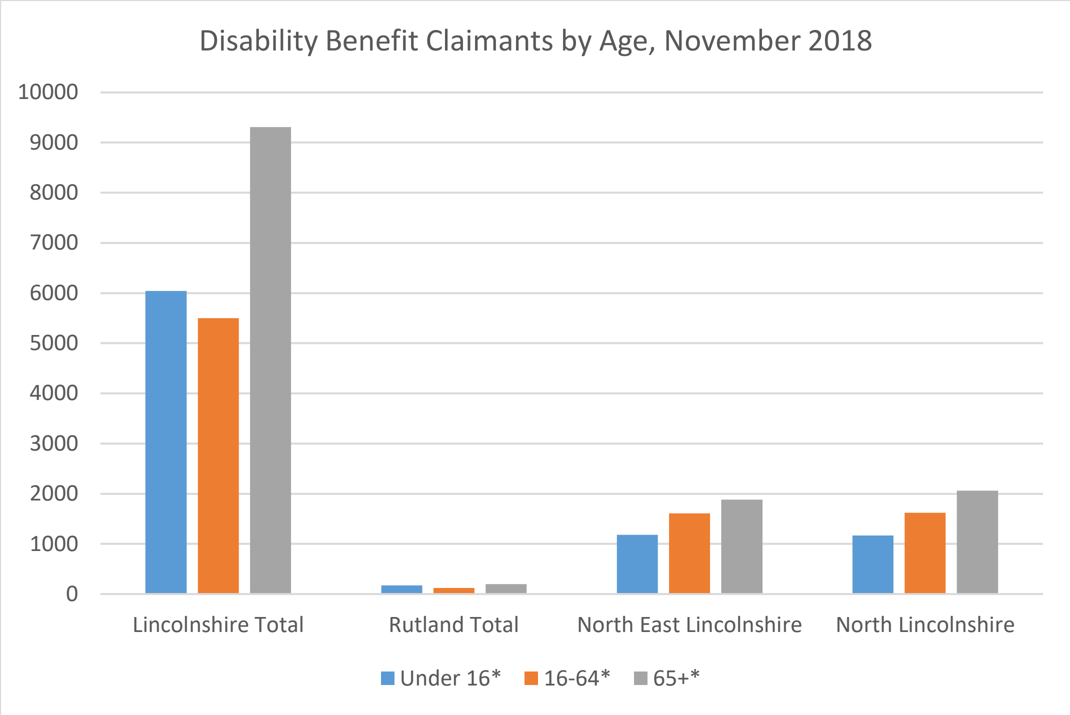

Figure 37: Disability Benefit Claimants by Age, November 2018

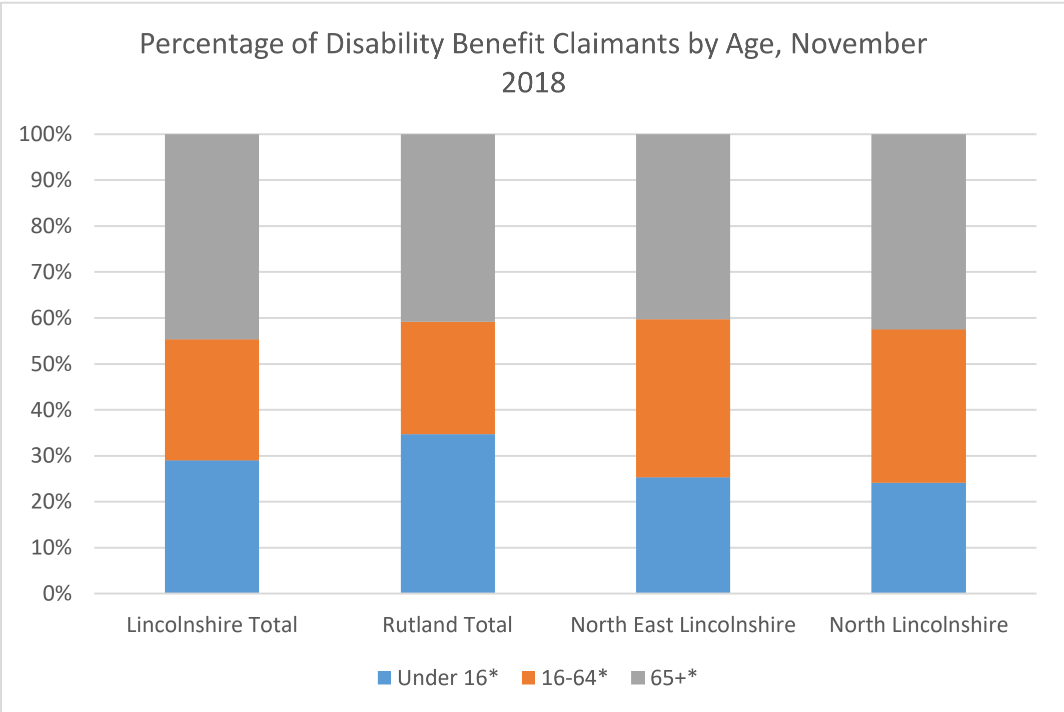

Figure 38: Percentage of Disability Benefit Claimants by Age, November 2018

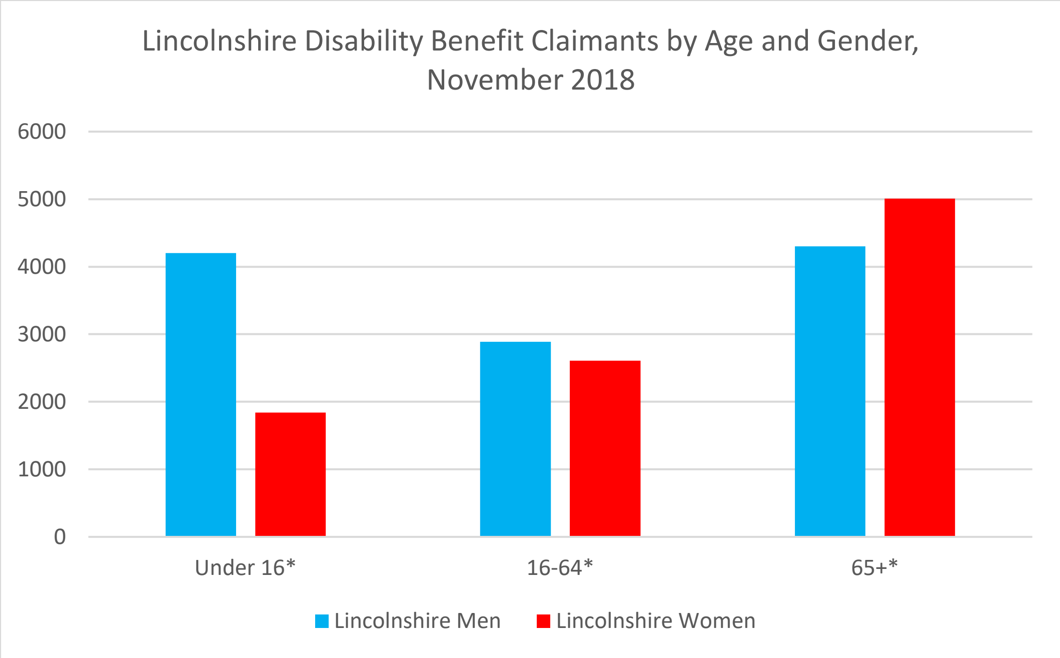

Figure 39: Lincolnshire Disability Benefit Claimants by Age and Gender, November 2018

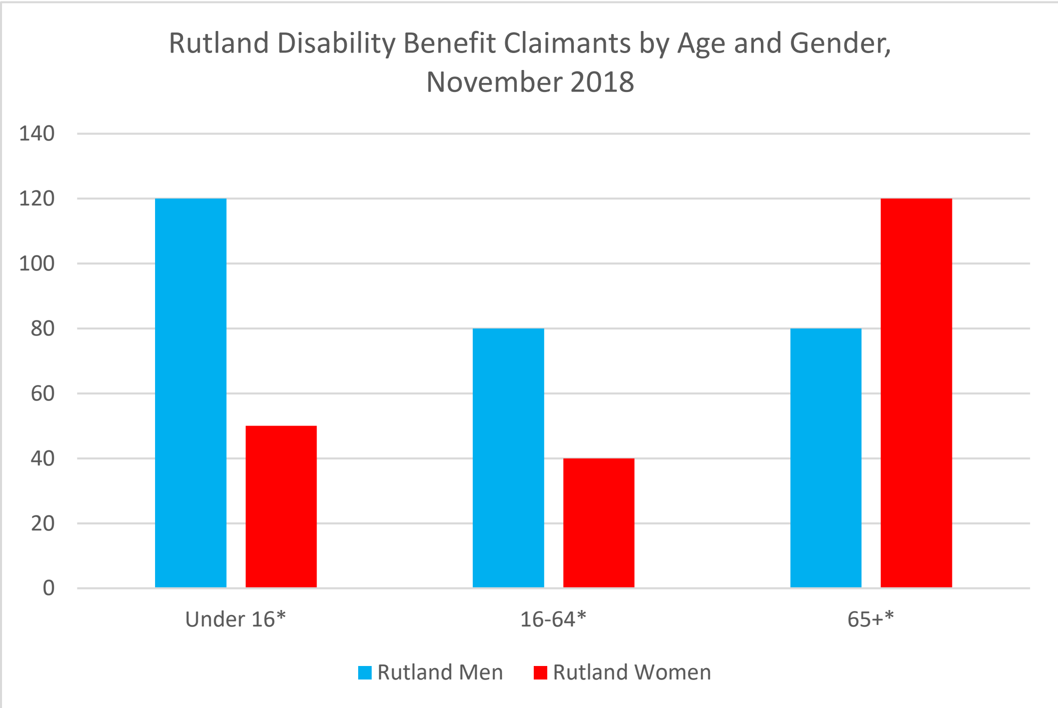

Figure 40: Rutland Disability Benefit Claimants by Age and Gender, November 2018

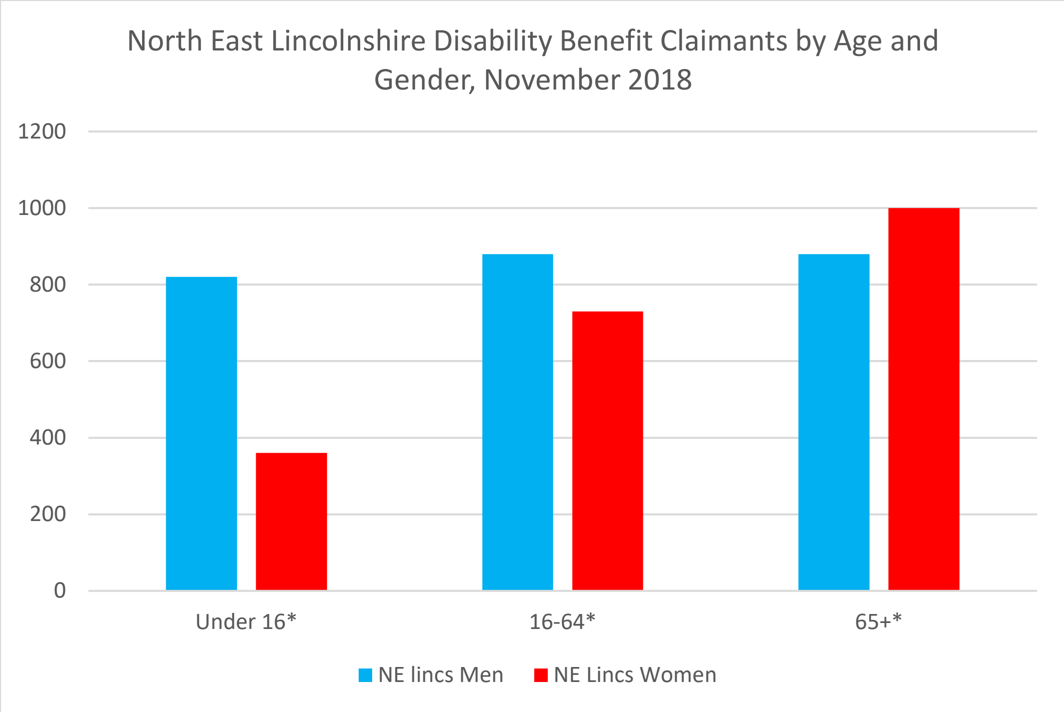

Figure 41: North East Lincolnshire Disability Benefit Claimants by Age and Gender, November 2018

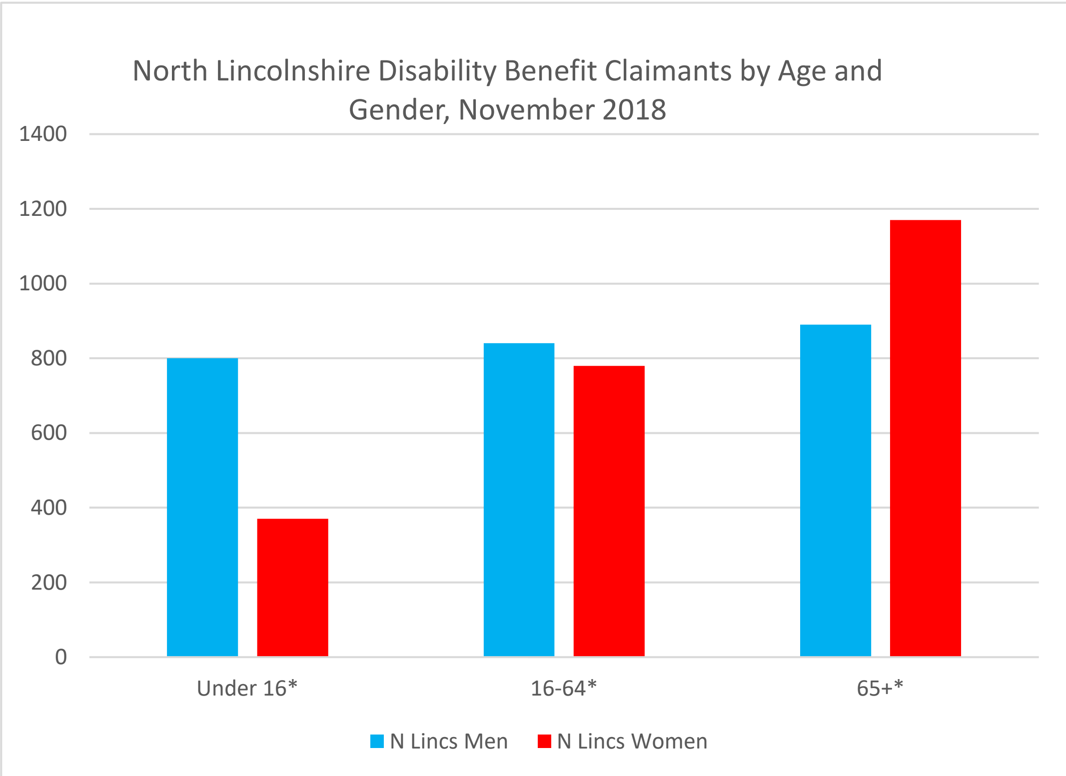

Figure 42: North Lincolnshire Disability Benefit Claimants by Age and Gender, November 2018

3.4.5.4 Gaps in provision for LGBTQIA+ people in sport

Demographic data on the size of the LGBTQIA+ population of Greater Lincolnshire and Rutland is scarce, as demonstrated by Part 2. Information about the companies, charities, and mutuals in Greater Lincolnshire and Rutland that specifically support LGBTQIA+ patrons is also scarce. Only one club is listed as being LGBTQ+ friendly in Lincolnshire according to Pride Sports[86] and it is unclear how many other sport, physical activity, and leisure providers in the area have adopted a code of practice that might foster an inclusive environment for LGBTQ+ individuals.

That can pose a problem to getting individuals active and promoting growth in the sector. A report commissioned by Sport England in 2016, shows that:

- 55% of LGBT men were not active enough to maintain good health, compared to 33% of men in the general population.
- 56% of LGBT women were not active enough to maintain good health, compared to 45% of women in the general population.
- 64% of LGBT people who identified as something other than male or female (e.g. genderfluid or genderqueer) were not active enough to maintain good health[87].

More recent data from Active Lives (Published April 2021, and covering 2019-2020 period) shows some improvement, with 70.5% of gay and lesbian people were classed as active[88], compared to 67.5% of bisexual people who participated in the survey. For those who reported having “other sexual orientation”, that number dropped to 49.7%. No data was shared about gender identity and physical activity.

However, data from both Sport England[89] and the Equality Network[90] shows that there is a widespread perception of sport as being not friendly to the LGBTQ+ community. The research presented by the Equality Network does specify that barriers to accessing physical activity are smaller, but respondents in their study felt that sport was not friendly to LGBTQ+ people. For that same reason, it is very difficult to get a sufficient data about the numbers of LGBTQ+ people participating in sport and physical activities, as the perceived unfriendliness of that environment might discourage them from disclosing that part of themselves to their teams or their coaches.

Guidance on helping LGBTQ+ people get active seems scarce and limited. A 2020 review on widening the participation of transgender and nonbinary individuals in sport has not yet been published, despite the release date being pushed back twice[91]. Some guidance is available from Pride Sports[92] but it is not complete.

86 https://pridesports.org.uk/
87 https://sportengland-production-files.s3.eu-west-2.amazonaws.com/s3fs-public/pride-sport-sport-physical-activity-and-lgbt-report-2016.pdf?VersionId=HWrXN2KhPLBV8mmOIEqCEh7E1FFOxZKM
88 completing 150+ minutes a week of moderate intensity physical activity.
89 https://www.sportengland.org/research-and-data/research/lgbtq
90 https://www.equality-network.org/our-work/policyandcampaign/out-for-sport/the-facts
91 https://www.sportengland.org/know-your-audience/demographic-knowledge/lgbt/review-transgender-inclusion-domestic-sport-uk
92 https://pridesports.org.uk/resources/

3.5 The role of data in future provision

3.5.1 The Good

The opportunities for data and digital tools are significant for the Sport, Physical Activity, and Leisure sector. This report owes a lot of its findings to open data, including information made available by the ONS, NHS, NOMIS, the UK Government, and local authorities. Well-coordinated data dashboards can help policy-makers in making fast, real-time decisions in order to maximise resource usage and deliver tailored solutions that the population needs.

An oft-cited example of digital technologies being put to good use is Joe Wicks' Keeping the Nation active initiative during COVID-19. This initiative, delivered through YouTube, was a great example of how a well-aimed, targeted intervention could be delivered quickly and efficiently to a large number of people. However, one aspect of this case study that is less often discussed is the sheer volume of data that can be accessed through YouTube's analytics. There are granular data which could then be used to target and improve existing interventions in real time. Geography, demographics, watch time, most viewed videos and most viewed parts of the videos – those are just a handful of the metrics that are available. A more locally-delivered intervention – perhaps, one aimed at getting inactive people engaged into some gentle form of physical activity – could review their data throughout the period of the intervention and adjust what they are delivering, doing more of what worked and less of what did not.

To give another example, fitness applications often apply data from their users to drive engagement – either through offering incentives for positive actions, or offering "nudges" when they deem that a person has become disengaged from the activity they signed up for. The kinds of incentives and "nudges" vary from application to application, but they are all based on the same principle.

However, opportunities for data to be deployed in the service of getting more people engaged in the sport, physical activity, and leisure sector are balanced against significant barriers to application. Namely, the digital divide and how it manifests in Greater Lincolnshire.

3.5.2 The Bad

Interview data suggests that in practice, data and digital tools have had a mixed effect on both the side of the employers and on the engagement with sport, physical activity, and leisure on the part of citizens. On the part of the employers, interviewees note that automation has taken away jobs from frontline staff – for example, self check-in kiosks and vending machines have replaced reception and hospitality staff. At the same time, interviewees noted that the rollout of automated/digital tools did not appear to increase participation in leisure centres. Indeed, in some cases, interviewees felt that automated/digital tools actively harmed participation, by creating barriers to entry.

It is worth noting that the impact of automated or digital tools on the sector did not occur in isolation. Pre-COVID, Greater Lincolnshire had a pronounced deficit in skills, and was identified as being at particular risk of automation[93] because of the makeup of local companies, levels of investment, and

[93] Probability of automation in England - Office for National Statistics (ons.gov.uk)

the provision (or lack thereof) of training for staff looking to upskill and move into different roles. The table below shows some of the roles most "at risk" of automation:

SOC10M – Description	Probability of automation
	Source: Annual Population Survey 2011-2017, Survey of Adult Skills (PIAAC) and Frey & Osborne probabilities
Waiters and waitresses	72.81%
Shelf fillers	71.70%
Elementary sales occupations n.e.c.	70.69%
Bar staff	70.66%
Kitchen and catering assistants	69.20%
Farm workers	69.05%
Sewing machinists	68.64%
Cleaners and domestics	68.13%
Tyre, exhaust and windscreen fitters	68.07%
Vehicle valeters and cleaners	67.77%

Furthermore, qualifications held in Greater Lincolnshire have consistently lagged behind the rest of Great Britain as illustrated in the table below:

Qualifications (Jan 2019-Dec 2019)[94]	Lincolnshire	Lincolnshire %	North Lincolnshire	North Lincolnshire %	North East Lincolnshire	North East Lincolnshire %	Great Britain
NVQ4 And Above	134800	30.6%	29000	28.3%	22200	23.20%	40.3%
NVQ3	102500	23.3%	18500	18.0%	21000	22.0%	18.2%
NVQ2	97500	22.1%	20400	20.0%	22300	23.4%	17.1%
NVQ1	53500	12.2%	14400	14.0%	12900	13.4%	10.0%
Other	28700	6.5%	8600	8.4%	6900	7.30%	6.7%
No Qualifications	23400	5.3%	11600	11.3%	10200	10.70%	7.7%

LORIC's past research has noted that there is a pronounced gap in literacy skills among adults in Greater Lincolnshire – a gap which has largely remained a hidden problem due to various individual and systemic issues.[95]

Beyond the workforce issues that the skills gap represents, there is also the digital divide and how it manifests itself in Greater Lincolnshire and Rutland. The digital divide is a combination of intersecting factors that impact an individual's likelihood to access and take full advantage of digital tools[96]. Those factors include barriers of infrastructure[97]; barriers of resources[98]; barriers of education[99]; and

[94] Source: ONS Annual population survey, as seen on NOMIS (local area profile)
[95] https://loric.thedata.place/dataset/adult-literacy-in-greater-lincolnshire
[96] Past LORIC research.
[97] Can individuals get access to reliable, strong WiFi in their area?
[98] Can individuals purchase the hardware and software necessary to use the tools?
[99] Do individuals know how to safely use the digital tools to their fullest?

emotional barriers[100]. Depending on how many of those barriers a person or community encounters, and to what extent they can overcome them, is what determines the breadth and depth of the digital divide for that person, or that community.

All this to say, there is a structural issue that prevents people from using digital tools to access sport, physical activity, and leisure; and that structural issue may well be beyond the ability of an individual leisure centre or gym to solve. When potential participants are put off by an app or an automated check-in desk, it may be for any number of reasons, including:

- Thinking that this is too complicated.
- Concerns about privacy.
- Feeling like they are not getting that “human touch” when coming to the leisure centre or gym.
- Thinking “this place is not for me” because they associate digital tools with expensive, “posh” places.
- Not understanding what is expected of them.
- Not having access to a smartphone or a computer.
- Not having access to digital banking tools.

Leisure centres and other sport facilities appear to have taken notice of that. According to interviewees, they are seeking to invest more in frontline staff, such as reception and hospitality, in order to cater to a wider range of clients. However, this is also where many interviewees come up against the recruitment and retention problem that was described in chapter one.

As described by interviewees, the staff and resource shortage has led to a lot of multi-tasking on the part of the existing staff. Some of the situations described in interview included managers taking on hospitality, reception, and housekeeping jobs alongside their contracted duties to maintain business continuity. While some leisure centres were implementing initiatives to increase staff retention, this was not evenly distributed and varied from place to place.

Moreover, even if all structural and individual barriers to engagement were removed, there is one final challenge in applying a utopic data model to the sport, physical activity, and leisure sector: namely, data quality and availability.

3.5.3 The Complicated

Open data is data that are easily accessible, published under an open license, and published in a form that is both readable by humans and by computers. Open data is the ideal for policy-makers and companies as it allows them to make evidence-based decisions quickly and with minimal challenge to obtaining that evidence.

Unfortunately, there is not open data on all possible subjects, and what is available is of varying quality. To give an example encountered within the preparation of this report, the demographic data for Lincolnshire, North East Lincolnshire, and North Lincolnshire took days to compile, sort out, and be made presentable. By comparison, the data for Rutland only took a couple of hours. There were no

[100] Does an individual’s socio-economic or cultural background prevent them from accessing digital tools?

differences in the operations being performed, just on the publishers and how they made their data available to the general population.

Naturally, there are paid-for services that provide similar or even better data – Van Djick Bureau, for example – but the key problem is that an annual licence to those services can cost anywhere from £5,000 to £50,000. It is a model that prices out micro, small, and even some medium-sized businesses; and if a company does not see the immediate return on investment of the product, it is less likely to want to seek it out in the future.

Harnessing the power of data for positive behaviour is a challenging endeavour that not all companies working in the sector can reasonably engage with. Cost barriers, skills barriers, and data literacy barriers can all hamstring an initiative, no matter how well-designed it is or how well it tests with focus groups.

Finally, the challenges to "nudge theory" which have been published in recent years. As reported, there is emerging evidence that "nudges" – techniques designed to change people's behaviour – are not as effective as initially represented, or at the very least, their return on investment is very small compared to their cost.[101] As such, it is worth considering what may be the most effective and the most impactful changes that the sector can make in order to encourage more people to engage with sport, physical activity, and leisure providers.

3.6 Recommendations

As demonstrated by this chapter, there are significant opportunities for developing provision in Greater Lincolnshire and Rutland. However, there are multiple individual, organisational, and structural challenges that may prevent citizens from engaging with the sector. As such, the recommendations that are put forward are aimed at addressing these challenges:

- Interventions aimed at increasing the confidence and self-efficacy of citizens. Examples include:
    - Targeted activities, based on consultations with various user groups (see chapter 2 for more details.)
        - Activities for ethnic minorities.
        - Activities for people with mental health difficulties.
        - Activities for people with disabilities.
        - Resources, training, and support for providers to better engage with people with multiple and complex needs.
    - As there was little or no data on the experiences and needs of non-binary and transgender people, there is a need for more research and direct engagement with LGBTQIA+ individuals to support them to engage with the sector.
- Interventions to address the lack of accessibility to sport, physical activity, and leisure in certain parts of the county. Examples include:
    - More funding for taking activities "on the road" or to local community centres.
    - More funding for local trainers.
    - More training and support for local providers.

[101] https://theconversation.com/nudge-theory-doesnt-work-after-all-says-new-evidence-review-but-it-could-still-have-a-future-187635

    - Investment in increasing both the accessibility of venues and the accessibility of programs.
- Interventions to address the lack of coordination between stakeholders within the sector. Examples include:
    - Better networking for all organisations with the sector.
    - Direct engagement with small providers, CICs, and charities that operate in the sector.
    - More targeted aid for small providers.
    - Better conversations between public sector (NHS, councils, GLLEP) and small providers, particularly the third sector.
- Increasing access to funding, both in terms of direct grants and in terms of information and aid to help providers access funding. Examples include:
    - Better signposting for funding calls.
    - Better information and support to help small providers apply for funding.
    - Building partnerships between small providers, charities, and CICs, and the public sector (NHS, councils, the GLLEP) to create continuity of funding. (See chapter 1 for more recommendations).
- Interventions aimed at increasing provision for specific demographic groups (see chapter 2 for more details.)
- Raising the profile of "atypical" active leisure and showcasing the good work done by providers within that part of the sector.
- Increasing early provision, both directly (through targeted programs) and indirectly (through measures that will increase access to these programs).
- Use data alongside local skills and knowledge to improve service delivery and increase access to programs.

4. Chapter Four: Skills gaps and development opportunities to support and develop a resilient and relevant workforce

4.1 Section Headlines

This chapter examines the labour needs of the sport, physical activity, and leisure sector. It will begin with a recap of the estimated size of the labour force and the existing skills of the sector, as detailed in Chapter 1. It will also reiterate some of the information detailed in Chapters 2 and 3 regarding the skills challenges, gaps, and development opportunities.

It will then look at the specific challenges of recruitment and retention, and the factors that drive the current skills gap that is observed in the sector.

The chapter will then examine the skills in demand, which include: digital skills, mental health first aid, multi-skilled development, and elite skills.

Finally, the chapter will examine the role of volunteers, and the current state of morale and motivation in the workforce.

4.2 Size of the labour force and existing skills

As seen in the previous section of this report (Forward Trends: the role of data and digital tools) the overall skills level in Greater Lincolnshire is somewhat lower than the average for the East Midlands and for Great Britain in general. According to the Annual Population Survey published by the Office of National Statistics, in 2021 there were far more people holding NVQ1 and NVQ2 level qualifications as their highest level of qualification compared to the rest of the region and the country; and far fewer people holding NVQ4 and above when compared to the rest of the region and the country.

	Greater Lincolnshire and Rutland %	East Midlands %	Great Britain %
All people aged 16-64: NVQ1	13%	12%	9%
All people aged 16-64: NVQ2	19%	17%	15%
All people aged 16-64: NVQ3	17%	18%	17%
All people aged 16-64: NVQ4+	32%	36%	44%
All people aged 16-64: None	8%	7%	7%
All people aged 16-64: Other Qualifications	7%	6%	6%
All people aged 16-64: Trade Apprenticeships	4%	4%	3%

The 2021 annual population survey, there were a total of 28,000 people potentially working in the sport, physical activity, and leisure sector in Greater Lincolnshire. (The data for Rutland was anonymised.) The majority of workers engaged in the Sport, Physical Activity, and Leisure sector appear to be employed in the "caring, leisure, and other service occupations" (34% of all employees) followed by "skilled trades occupations (19%) and "associate professional and technical occupations (18%). This distribution appears to be in line with regional and national percentages, but skews towards the less senior roles. Specifically, the roles described as "caring, leisure, and other service occupations" represent only 23% of all roles in Great Britain, and 30% of all roles in the East Midlands, compared to 34% of all roles in the industry in Greater Lincolnshire.

	Greater Lincolnshire		East Midlands		Great Britain	
	Number	%	Number	%	number	%
Managers, Directors and Senior Officials (SOC2010): R-U Other services[102]	2,300	8%	11,800	11%	171,800	10%
Professional Occupations (SOC2010): R-U Other services	2,800	10%	12,200	11%	279,800	16%
Associate Prof & Tech Occupations (SOC2010): R-U Other services	5,000	18%	17,500	16%	405,800	23%
Administrative and Secretarial Occupations (SOC2010): R-U Other services	1,300	5%	9,200	9%	157,900	9%
Skilled Trades Occupations (SOC2010): R-U Other services	5,200	19%	12,500	12%	137,500	8%
Caring, Leisure and Other Service Occupations (SOC2010): R-U Other services	9,600	34%	32,200	30%	400,500	23%
Sales and Customer Service Occupations (SOC2010): R-U Other services	!		2,000	2%	67,700	4%
Process, Plant and Machine Operatives (SOC2010): R-U Other services	!		1,600	1%	22,100	1%
Elementary occupations (SOC2010): R-U Other services	1,800	6%	7,800	7%	134,500	8%

Further breakdown by age bracket shows that 61% of all the people employed in the industries in Greater Lincolnshire are 25-49 years of age (compared to 57% in the East Midlands and 56% in Great Britain). According to the same data source, 69% of all people working in these industry classifications were registered as "employed", 26% were registered as self-employed, and 5% were registered as "other flexibility." There were slightly more people registered as self-employed or working in other flexible arrangements when compared to the rest of the East Midlands or Great Britain, but not to an extent where it represents a significant difference.

	Greater Lincolnshire		East Midlands		Great Britain	
	Culture, Media and Sports Occupations	Leisure, Travel and Related Personal Service Occupations	Culture, Media and Sports Occupations	Leisure, Travel and Related Personal Service Occupations	Culture, Media and Sports Occupations	Leisure, Travel and Related Personal Service Occupations
All people	7,400	8,300	34,100	39,600	649,800	557,200
Full-time	2,600	4,600	20,600	22,000	418,700	333,000
Part-time	4,800	3,700	12,900	17,500	229,600	224,000

An examination of the NOMIS data on occupations and flexibility shows that there were more people in Greater Lincolnshire working part-time in culture, media, and sport occupations; which appears to be in inverse to the regional or national trends. The breakdown by flexibility for leisure, travel, and related personal service occupations, however, follows the same trends.

Please note, SIC and SOC codes are imperfect ways of estimating the size of an industry. Depending on the interpretation, the actual size of the Greater Lincolnshire Sport, Physical Activity and Leisure sector is anything between 15,700 and 28,000 people employed across all possible occupations and all types of contracts (leisure, art, culture, media, administrative, elementary, and managerial roles).

[102] R-U Other services include: arts, entertainment and recreation; other service activities; activities of households as employers; and undifferentiated goods and services producing activities of households for own use, and activities of extraterritorial organisations and bodies.

However, what is relevant for this analysis is the distribution of these occupations and skills in Greater Lincolnshire and Rutland when compared to the rest of the East Midlands and Great Britain.

The size of the labour force in Greater Lincolnshire and Rutland for the sport, physical activity, and leisure sector is more seasonal than in other parts of the country. It also appears that ages 25-49 are more represented in the area than in the rest of the region. Finally, there is a lot more flexibility, as evidenced by the proportion of self-employed people, and people on other flexible contracts.

4.3 Recruitment and retention

Participants pointed at recruitment and retention as one of the biggest, if not the biggest challenge for the sector. Funding and the cost of overheads were common themes in both survey and interviews, but it was the challenges of recruitment and retention that came up for every participant.

Recruitment is a challenge for many sectors in the UK economy, and at the time of writing, the August labour market statistical bulletin from the Office of National Statistics shows there are 1,274,000 job vacancies across the UK. The number is a slight decline from the previous quarter, but still represents about half a million vacancies more than in January-March 2020[103].

Nevertheless, as participants noted, there were several factors that exacerbated the recruitment and retention challenges for the sport, physical activity, and leisure sector:

> The seasonality of the labour force, particularly in the leisure sector on the Lincolnshire coast, resulted in the sector being impacted by COVID-related furlough and redundancies.
>
> Many of the staff that were then made redundant or furloughed took the time in 2020 and 2021 to retrain and enter the workforce in another industry. As documented in both secondary data and participant testimonials, many experienced workers who were previously occupied in the sport, physical activity and leisure sector sought employment in less seasonal occupations.
>
> Many of the workers who stayed in the sector had the ability to negotiate higher salaries, particularly sports coaches and personal trainers. This, in turn, drove the prices of labour even further up.
>
> The rollout of digital tools for the sector during the pandemic presented many opportunities for innovation and the introduction of digital skills. Many of the tools introduced in the sector also made many roles obsolete – notably, reception staff and hospitality staff. Consequently, participants in this research project note that a lot of roles that would have been done by multiple workers are now being filled by just one or two people, sometimes to the detriment of service quality.
>
> There were no incentives for skilled workers to return to the sector after COVID and furlough. As explained by the research participants, the seasonality of the sector combined with the lack

[103] https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/bulletins/uklabourmarket/august2022

of clear career path meant that for many workers, other industries were a better, safer investment of their time and effort.

Taken together, these five factors have resulted in a significant skills shortage in the sector, combined with a very high turnover of staff. What participants observed was that it was a lot harder to fill the positions they had, and it was a lot harder to keep the staff they did hire. In addition to hiring skilled people into the roles they did need to fill, participants also found there was now a need for many new skills that had hitherto not been developed in the sector.

Incentives: “More than a job, but a career”

In response to the challenge of recruitment and retention, many workplaces have started offering enhanced incentives for people to join in, including more workplace training and higher salaries. However, some of the good practices shared by the participants include strategies aimed at actively developing their workforce and creating long-term careers. In other words, they approached the problem of recruitment as “not just giving a person a job, but a career.”

An example of what this strategy might look like is workplace schemes, multi-skill training programs, and developing parallel career paths in the company. A person might join a leisure centre as a lifeguard for a summer, but receive training for multiple other roles (for example fitness training, physical therapy, mental health first aid.) That person would then have the option of developing their career on its original track, or to transition into a different role if they find that it does not actually suit them.

At the same time, participants stressed the importance of showcasing people in senior leadership roles whose career path was unconventional. For those participants, a crucial part of raising aspirations for staff was demonstrating how a person might be successful if they pursue a career in this organisation (as opposed to viewing this as a stopgap job between school and university).

This strategy – the pursuit of developing cadres and putting them on a long-term career track – is valuable not just because it is likely to reduce the overall training bill for a company, but also because it could positively impact employee morale, increase loyalty, and encourage people to stay in their role instead of changing jobs every 3-6 months.

Furthermore, the rapid turnover of staff is a considerable concern for employers in the sport, physical activity, and leisure sector. Far from being a temporary phenomenon, participants expressed concern that this may become commonplace, especially as the cost-of-living in the UK continues to increase. However, rapid turnover is not the only major threat perceived by participants. Indeed, as described by some participants, this threat is not one that can be addressed by an individual employer.

“It’s too expensive to work”

While some employees appear to have taken advantage of the current labour market to “jump between jobs” and negotiate higher salaries for themselves, some of the participants in this study have noticed a phenomenon where people are taken out of the workforce, not because they don’t want to work, but because it is too expensive for them to do so at their current level. Reasons driving this phenomenon include:

- The cost of fuel: At the time of writing, the cost of gasoline in the UK is round £1.711 per litre[104], bringing the cost of filling a family car between £80 and £120 per trip.
- Cost of childcare: A part-time place in a nursery for a child under 2 works out at £137 per week, or £263 per week for a full-time place. For a 49-week term, this adds up to £6,762 per year for a part-time place and £12,887 for a full-time place. Registered childminders cost a little less (£118 per week for part-time care and £228 for full-time care), but a live-in nanny can cost up to £650 per week, plus tax, National Insurance contributions, as well as room and board.[105]
- Cost of care for sick family members: According to Carers UK, there are approximately 11.5 million people in the UK providing unpaid care to a person who is elderly, seriously ill, or disabled.[106] Additionally, a large percentage of people will provide care for more than one person (like a child and a sick family member) over their lifetime. With the cost of home care starting at £15 per hour, it could cost between £375 and £750 per week to have a professional carer supporting family members.
- Cost of being ill: At the time of writing, statutory sick pay is at £99.35 per week for up to 28 weeks.[107]
- Not being able to afford to work remotely: As discussed by the participants, not everyone working in the sport, physical activity, and leisure sector can do their work remotely to accommodate childcare and family caring responsibilities.

These challenges are universal to all workers, but they impact young women and early career workers disproportionately. According to the Annual Population Survey (Q1 22 results) the most common reasons for women in Greater Lincolnshire and Rutland to be economically inactive were looking after the home and family, or long-term illness. (For males, the most common reason to be economically inactive was long-term illness or being in higher education.) Women were also more likely than men to have second jobs in Distribution, Hotels, and Restaurants; as well as second jobs in Public Administration, Education, and Health. Women were more likely to work part-time than men (based on weekly hours worked) at a lower median hourly rate[108]; and even women in full-time employment earn a median of £485.70 per week, compared to £621.30 per week for men.

What this means is that the financial burden of work is likely to grow, and that financial burden is more likely to be carried by women and young people at the start of their career. While the cost of working can be somewhat mitigated by workplace schemes, participants noted that, unless the worker was a middle manager and earning a high salary already, those measures were not likely to have a significant impact on them staying in employment.

This signals a need for a sector-wide intervention – not just to drive recruitment, but to address the underlying causes of under-employment and under-use of resources. Examples of such interventions include:

- More digital opportunities.
- More training to fill digital roles.
- More investment in local employment opportunities, cutting the need to travel.

[104] https://www.globalpetrolprices.com/United-Kingdom/gasoline_prices/
[105] https://www.nct.org.uk/life-parent/work-and-childcare/childcare/average-childcare-costs
[106] https://www.local.gov.uk/lga-libdem-group/resources/template-motions/unpaid-carers
[107] https://www.gov.uk/employers-sick-pay
[108] Median hourly rate for female part-time workers is £12.75; median hourly rate for male part-time workers is £14.81

- More investment in childcare and elderly care facilities.
- More investment in local transport and infrastructure to allow for seamless travel or for people to take on digital opportunities within the sector.
- More investment in the recruitment of elite coaches for the sector.

It is worth noting that while the sport, physical activity, and leisure sector is one where face-to-face delivery is very important, it is not the only set of skills that is in high demand, as the next section will explore.

4.4 Skills in demand

4.4.1 Digital skills

Participants named digital skills as some of the most in-demand for their workforce – not just for the creation of applications that people might use to engage in sport, physical activity, and leisure, but also for many supporting roles, such as:

- Social media management and marketing.
- Production of digital content (e.g. blog posts, articles, videos, graphics, etc.)
- Digital administration, such as running websites, sending out email campaigns; and more.

While the usage of digital tools dropped off in 2021 and 2022, as lockdowns began to lift and people started engaging face to face again, participants noted the increase that occurred in 2020. For some, that signalled that there was a significant opportunity for the sector to expand, and reach new clients beyond those they already work with. However, that also meant there was a need to develop these digital capabilities within their own teams.

One participant described their digital strategy as a one-person show, as he developed most of the content, uploaded it online, and pushed it to their various audiences. That appears to be the strategy of many other companies in the sport, physical activity, and leisure sector. However, that same participant noted that this was not sustainable, nor was it something they wanted to engage with on a full-time basis.

Participants named different reasons as to why they wanted to invest more in digital skills:

- Helping their message to reach more people;
- Getting a competitive advantage;
- Engaging audiences they would not have otherwise engaged with in the past;
- Publicity alignment (necessary for national campaigns and partnerships);
- More efficient working;
- Better engagement with younger audiences;
- Better return on investment for their marketing budget.

Unfortunately, participants also noted that their organisations were not at a point where they could actively invest in the training and hiring of dedicated staff members who would work on their digital strategy. What happened most often was that one or two people in the company would do what they could in their free time to produce content, but none of the participants reported having a dedicated social media or digital strategy.

4.4.2 Mental health first aid

Demand was for mental health first aid was high, as well as any other skill that enhanced the ability of staff to provide support to people who might struggle with their mental health. As explained by one of the participants, many people are struggling with their mental health after the pandemic. For people to be able to engage with sport and physical activity, they can sometimes benefit from an adjustment period, and some time building up their confidence before they start to attend regular classes.

LORIC came to a similar conclusion when the centre produced their 2021 report on Adult Literacy in Greater Lincolnshire. For certain populations, and in certain areas, there is simply not enough provision to allow somebody to jump into a structured activity.

4.4.3 Multi-skilled development and Elite Skills

While some of the participants in this project talked about the need for specific skills in the sector, most brought up the need for multi-skilled development and multi-skilled training, (i.e. the recruitment and nurturing of staff that have a variety of skills and abilities).

The skills cited by interviewees as being in demand include, but are not limited to:

- Literacy.
- Sales.
- Customer service.
- Policy document training.
- Library skills (for community centre volunteers).
- Skills to manage Long Covid.
- Skills to manage mental health difficulties.
- Skills to manage safeguarding and welfare.
- Skills to engage effectively with inactive communities.

The reasons for the demand for multi-skilled development were rooted into the needs of the individual organisations. A prevailing sentiment was that there needed to be more cohesion with education providers to equip young people with more varied skills for the workplace. While individual employers talked about how they were investing in multi-skilled training for their workforce, and creating varied career paths for their workers, they also noted that education also had a part to play.

Survey respondents also emphasised the opportunities for a joined-up approach with healthcare providers, which in turn created a demand for corresponding skills, including but not limited to:

- Understanding complex health needs.
- Helping to alleviate and mental health issues.
- Skills needed to help people struggling with obesity.
- The running of health hubs.

- Promoting benefits of healthy lifestyle on mental health.
- Working in collaboration with researchers to co-produce research that can address issues with physical inactivity.
- Pre- and post-natal course delivery.
- Working with over-55 groups.
- Working with children and young people.
- Working with families, and more.

Elite skills were also brought up as being in particularly high demand for sports clubs. As explained by one of the interview participants, natural ability can only take a person so far – an elite coach can help many skilled young people reach their full potential. However, there was a “frustrating” lack of coaches with the kinds of elite skills that were needed, with families having to travel across the Humber to access the facilities and the skills that they needed. Whilst local providers explained that they did their best, they also explained that there are certain skills that can only be achieved through elite coaching and mentoring.

Finally, both survey respondents and interview participants emphasised the role volunteering had on recruitment and retention for the sector, which is what the next section will focus on in more detail.

4.4.4 Professional skills in volunteering

So far, this chapter has outlined the challenges and opportunities for the labour force in Greater Lincolnshire and Rutland. To some extent, these challenges have been exacerbated by COVID-19 and the cost-of-living crisis; others were present before the pandemic.

What has not yet been discussed in great detail is the third sector, and specifically the role of volunteers. As one interview participant noted, the third sector has been in “crisis mode” for a long time, and has been concerning itself with the problems that are now considered endemic for the sport, physical activity, and leisure sector – namely, the lack of provision for under-served populations, the rising costs of utilities, and the lack of funding for elite coaches. The third sector has been very creative, as many interviewees noted, but many organisations that didn’t used to need funding are now finding themselves in need of help.

In the survey, most respondents noted that they didn’t have salaried employees, and that their board of trustees and volunteers ran everything. There was a sense among both survey respondents and interview participants that more volunteers were needed across the board, as they provided a crucial service for the sector – from mass participation events, to the running of sport clubs, to the maintenance and upkeep of venues.

Participants also pointed out the need for more professional skills in their volunteers. While some providers only needed volunteers to help run events (like marathons, Park Runs, and fundraisers), others – such as village halls and community centres – had much more complex and comprehensive requirements, such as customer service skills and library skills.

In addition to filling any customer-facing roles they might have, many charities, Charitable Incorporated Organisations (CIOs), and charitable trusts also struggled to recruit trustees into their boards. Participants pointed towards the difficulty of recruiting trustees as a threat to their organisations, as lack of continuity and succession planning leaves them vulnerable to long-term changes.

As seen from the previous chapter on future trends, village halls and community hubs are crucial, not just for the sport, physical activity, and leisure sector, but to local regeneration as a whole. In many rural settings, volunteer-run community hubs are the only opportunity for local residents to access library services, leisure activities, physical activity, and sport. They offer crucial services such as WiFi access and warm spaces, particularly for citizens who are struggling to pay their bills or who might not have access to the Internet to complete a benefit claim or a passport application. In communities with limited transport links, village halls offer the only means for people to socialise.

Given the role fulfilled by these spaces, it is understandable that the skills demanded of their volunteers are more complex than those of an event organisation committee. However, it also leads to a phenomenon which will be explored in more detail in the next section, which is the professionalisation of volunteering.

4.5 Volunteers

Volunteers are a core part of the Sport, Physical Activity, and Leisure sector. They are also becoming increasingly more and more professionalised, as they deliver at a standard of conduct and skill level that is comparable to those in paid-for roles.

This trend towards the professionalisation of volunteering has been observed for at least a decade now, with articles demonstrating the impact of different organisations becoming more and more volunteer-led being published as late as 2011[109] and the professionalisation of volunteer management being observed by researchers as early as 1982[110]. In all sectors, it is becoming increasingly common for volunteers to be screened and selected for roles the same way they do for payroll jobs; and they receive training that is comparable to, if not exceeding that in salaried positions.

The sport, physical activity, and leisure sector is no exception. Of the respondents to the survey, 64% represented Charities, 14% were Community Interest Companies, and 14% more represented other kinds of voluntary organisations. Most didn't have employees, or had less than 10 employees. A vast amount of work was being done by the boards of trustees, with support from volunteers.

Participants from charitable organisations and community interest companies described the high standard to which they held their volunteers. Induction comprised comprehensive training on data management and GDPR, equality and diversity law, health, and safety in the workplace, and more. Volunteers were also expected to provide high-levels of support to customers, work to deadlines, keep to schedule, and deliver key project indicators as set by their managers.

Moreover, while participants described encountering some pushback from volunteers, they felt that most of the people who donate their time to the organisation understand the need for more professional norms in the workplace and followed that code of conduct without complaint. Volunteers

[109] https://core.ac.uk/download/pdf/229306923.pdf
[110] https://journals.sagepub.com/doi/10.1177/089976408201100211

who responded to demands for more professionalism poorly were perceived as the minority. Participants described it as a relationship of needs and requirements, where the organisation requires certain standards be met by its volunteers, and the volunteers consent to work to those requirements.

That is not to say that organisations did not still offer volunteering opportunities to those who may need them for mental health or employability reasons. But participants stressed that volunteering was primarily a professional arrangement, and that volunteers ought to be held to the same standard as salaried employees, as far as skills and professional conduct went. While the participants talked about the ways in which volunteering could enrich the lives of people and support them into the workplace, the interviews focused on the need for professional volunteers, including:

- Administrators.
- Librarians.
- Sales people.
- Sales managers.
- Custodians.
- Accountants.
- Trustees.

The need for more volunteers on the trustee board – especially young trustees – was brought up as a particular concern. Most trustee boards for village halls and community centres are made up of volunteers at the end of their working life, or who are already in retirement. While that gives them the time to engage fully with the needs of the organisation, it also means that they are limited in what they can do and how they can grow. A need for professional project management, accountancy, and policy skills on the board was singled out as key to the long-term longevity of the organisation.

Many of the community centre representatives who contributed to the interviews had started up their organisations to preserve local services. Participants described how they wanted to make sure there were still activities for elderly residents, how they wanted to preserve their local library, how they were trying to make sure there were still places for people to access the internet, fill out passport applications, or access the myriad of digital-first services they could not access at home. An overarching theme for the voluntary sector was how local communities were all trying to step in to make sure local residents were not left behind.

This information provides a valuable snapshot of the current state of the volunteer labour market in Lincolnshire. Whereas the private sector is experiencing a demand for high skilled labour, the volunteer sector appears to be made up by retirees and over 55s. The perception is that the volunteer workforce is highly skilled, highly motivated, relatively secure in their relationships and housing, and in possession of a good work-life balance. While respondents did note that some of their volunteers might be worried about money and finances at present, nearly half of respondents thought that bills and funding were not their workforce's biggest concern, which is an interesting trend when compared to the rest of the labour market.

These findings appear to align with the data provided by Sport England in their Active Lives survey. The latest statistical release from November 2021 shows that volunteers are more likely to be male, aged 35-54 or 55-74, and affluent. Despite an overall decrease in volunteering in 2020-2021 compared to 2019-2020, 35% of all volunteers contributed at least 2 hours per week, 29% did so between 45 minutes and an hour, 11% volunteer for at least 3 hours, and 5% volunteered for more than 4 hours per week.

Respondents to this research – both survey and interview – noted that the volunteer workforce was highly motivated, collaborative, and responsive to the needs of the community. Long-term career planning did not appear to be applicable for the volunteer workforce, and investment in the volunteer workforce did not appear to be a high priority for respondents, as seen from the graph below.

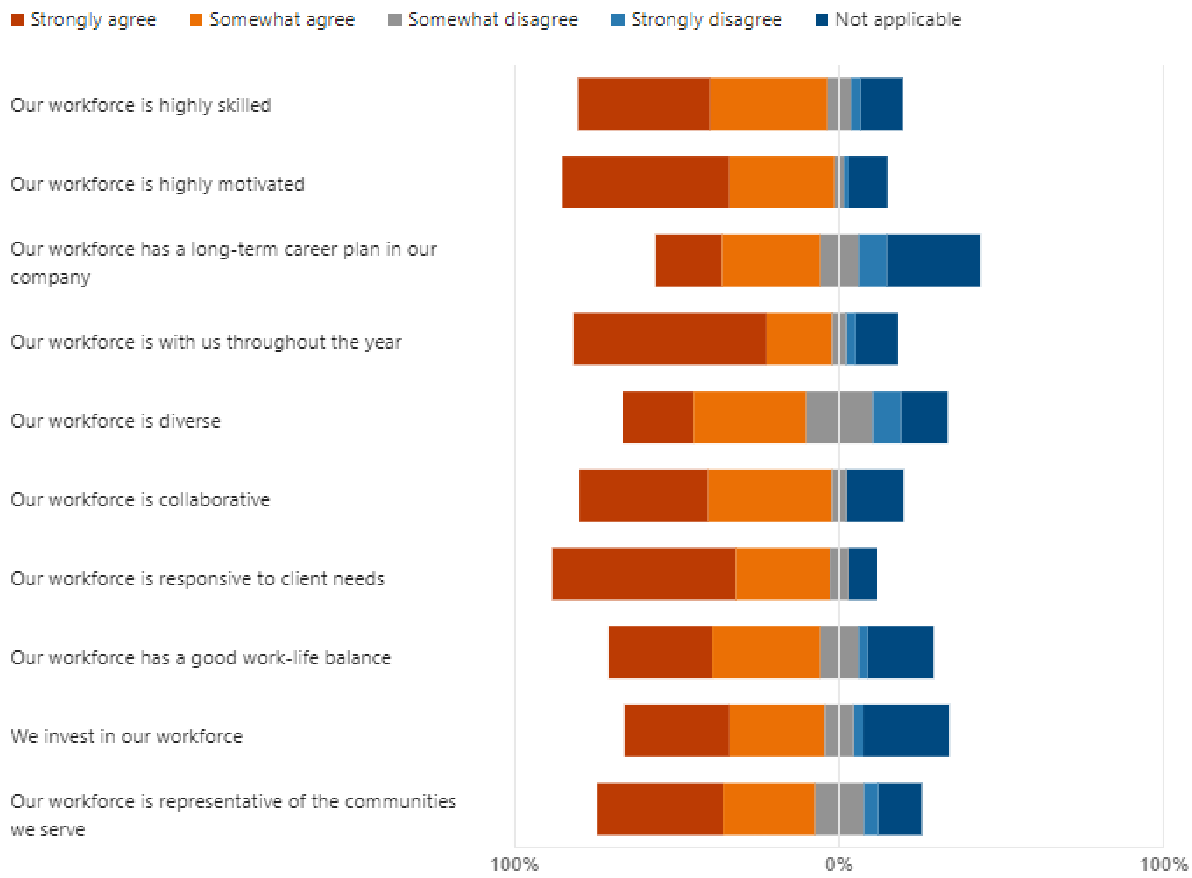

Figure 43: Survey Question 19: To what extent do you agree with the following statements about your workforce?

Both survey respondents and interview participants praised their volunteers for the hard work they did and for the ways in which they were able to pull off amazing, creative solutions to problems, before, during, and after the pandemic. At the same time, while survey respondents thought their workforce was highly motivated, interview participants had far more mixed views about morale in both their salaried workforce and among volunteers.

4.6 Morale and Motivation

An interesting aspect of the interviews which wasn't observed in the surveys were the mixed views held about the morale and motivation of the workforce. Whilst participants praised their employees and volunteers about the amazing work they did, there was also a sentiment expressed that workers were not as passionate about the sector as they used to be.

The lack of motivation manifested itself in different ways: a diminished "feeling of community"; a diminished interest in volunteering on the part of all people, but especially young people; high turnover as workers leave new jobs for better paid ones.

An ongoing theme in many of the interviews was the fear that participants perceived in their workforce, due to the lack of stability in the sector. Participants in third sector organisations described the difficulty of filling all their volunteering positions every year, and expressed frustration that members of the local community did not seem to want to take a more active part in running activities. As described by one participant, residents had lots of ideas about what their organisation should do, what events they should put on, and what changes it should make; however, none of those residents wanted to volunteer or take ownership of making such events happen.

The diminished morale and motivation were perceived as being a major problem; at the same time, though, participants did not name a singular source of this diminished morale. In the interviews, there were many themes that overlapped with the motivation of the workforce: lack of funding, lack of training opportunities, automation of work, failure on the part of employers to recognise the value of volunteering, and a lack of aspiration. Some participants described volunteers coming in with a bad attitude towards their role – "this isn't my job, I'm just a volunteer, I'm not responsible for that". However, those participants also stressed that these incidents tended to be a minority – an exception, rather than the rule.

More often than not, participants described a feeling of exhaustion in the sector. Some felt that COVID-19 had given the sport, physical activity, and leisure sector a major opportunity to overhaul the way it approached employment and training. Indeed, as one participant described, the sector was already losing 80% of its workforce every 5 years pre-pandemic; in other words, the conditions for the poor morale and low motivation were present before lockdowns and the gradual re-opening of the economy accelerated the workforce problems that are being observed now.

As for how the problems could be addressed, participants pointed out that most solutions require money, both directly and indirectly. For example, while some participants wanted more young people to be involved in their local community, they also acknowledged that young people had more financial pressures and more demands on their time than those who were recently retired. The rising costs of utilities and fuel were also seen as limiting people's opportunities for being involved in volunteering, or taking up entry-level roles. While volunteering was seen by many as a great way to get into the sector, participants acknowledged that it is not something everyone can afford to do.

However, participants agree unanimously that the cost-of-living crisis and the COVID-19 pandemic have had an impact on morale and motivation of the workforce. As such, the next chapter of this research will focus specifically on these two ongoing challenges and their specific impact on the sport, physical activity, and leisure sector.

4.7 Recommendations

As demonstrated by this chapter, the workforce of the sport, physical activity, and leisure sector is staffed by many talented and skilled employees and volunteers. However, there is a growing demand for complex skills, limits to what training can be undertaken, and structural challenges to recruitment and retainment. As such, the recommendations that are put forward are aimed at addressing these challenges:

- Funding and partnership support to provide training and upskilling, particularly in the areas where there are skills in high demand. Examples include:
    - Upskilling existing workforce where possible.
    - Actively developing long-term career paths for employees.
    - Helping businesses overhaul their income model without penalizing employees.
    - Lobbying for better salaries, especially for entry-level workers.
    - Courses and mentoring to help existing employees learn about digital skills.
    - Integrating Mental Health First Aid into the training of employees.
    - Making Multi-Skilled Development and Multi-Level Career Paths the norm, rather than the exception.
    - Increase funding to attract Elite Coaching to the county.
- Raising the profile of volunteers and volunteering within the sector, with the view of increasing collaboration between stakeholders. Examples include:
    - CSR schemes to encourage volunteering, both in entry-level positions and on Trustee Boards.
    - Raising awareness of the value of skills developed during volunteering to support entry to the labour market where possible.
    - Provide business training and business support for the third sector.
    - Increasing collaborations between businesses and the third sector.
    - Working with public sector partners to encourage more volunteering. (For example, for people who might have been out of work for a while.)
- Targeted support towards aiding stakeholders in recruiting and retaining staff.
    - Support for year-round employment schemes, through cross-training and various skills development.
    - Funding for eligible companies to hire people year-round.
    - Lobbying, support, and funding to increase the resilience of the sector, both as insurance in the case of another global pandemic and to make enterprises more financially robust.
    - Investment in employee retention schemes, particularly for skills of high demand.
    - Discouraging role consolidation.
- Take active steps to reduce the cost of working, particularly for entry-level workers and women. Examples of that include:
    - Childcare / elderly relative care support schemes.
    - Support for family carers in the workplace.
    - Support schemes for transport costs.
    - Creating working opportunities closer to home or allowing more hybrid working depending on the role.
    - Mentorship and training schemes for employees who might have been out of work for a while.

5. Chapter 5: Understanding the impact of COVID-19 and the Cost-of-Living Crisis on the sector

5.1 Section Headlines

This chapter will begin by looking at the impacts of COVID-19 on individuals, the workforce, and on providers. It will examine the overlapping factors that inhibit growth, prevent citizens from engaging with physical activity, and create barriers to employees.

It will then look at the impacts of the Cost-of-Living crisis on individuals, the workforce, and on providers. It will recap some of the findings from previous chapters, but it will also look at cost-of-living crisis specific factors that might inhibit growth and productivity in the sport, physical activity, and leisure sector.

5.2 The impacts of COVID-19

Research published throughout the COVID-19 pandemic has shown the many ways in which long-term isolation and long COVID have impacted the lives of the population.

5.2.1 Impacts of COVID-19 on individuals

During the first year of the COVID-19 pandemic, some of the participants noted an sharp increase in physical activity, particularly running, in the general population. Participants also noted that the first year of the pandemic was the one with the most imaginative and innovative initiatives introduced by local authorities and other physical activity providers.

However, participants also noted that the second year of the pandemic, as lockdown restrictions were lifted, very few people continued their engagement with physical activities. Reasons given ranged from people simply being busier, having less free time, or insufficient support being put into place to encourage them to keep going. Digital tools were seen as useful to some, but participants also noted that not everyone in Greater Lincolnshire and Rutland had the same access to digital tools, online classes, or similar remote support. (See Chapter 3).

Other positive changes noted by participants were the increased appreciation for community resources and the increased appreciation for exercise time. In the first year of the pandemic, some participants noticed how the limited time people had to go outside translated into greater focus on physical exercise and greater appreciation for the time they had outside. Participants felt that this momentum could have been carried over, if individuals were given sufficient support in continuing with their new habits – unfortunately, they also felt they didn't have enough cohesion and resources to do so.

Long COVID was brought up as something that would impact citizens for a long time, and possibly impact their engagement with the sector. While leisure centres and community hubs reported doing a lot of work to tell people it was safe to visit them again, it was felt by participants that numbers are not yet back to what they used to be. When discussing skills in demand for the sector, some participants brought up rehab from COVID, as well as skills to help reduce citizens' anxiety. They also talked about the need to help people connect, taking people into nature, and aiding in the building of useful skills after the pandemic.

Indeed, the impact of the pandemic on individuals' mental health was seen as disruptive by participants as the impact of the pandemic on physical health.

Over the course of the COVID-19 pandemic, multiple publications issued warnings about the impact of long-term isolation on mental health, specifically on those with pre-existing conditions. Indeed, the Royal College of Psychiatrists noted that the country saw a record number of referrals for mental health conditions in 2021[111], with the ONS further reporting on the rise in self-reported depression in adults over the time period[112]. The ONS data also notes that the groups more likely to report depressive symptoms included:

- Women aged 16-69, with the highest prevalence being among women aged 16-29.
- Young adults aged 16-29.
- Disabled and clinically vulnerable adults.
- Economically under-active and unemployed individuals.
- Adults with lower personal incomes.
- Adults living in single-person households.
- Adults living in areas of high deprivation.
- Adults living in precarious housing situations.

NB: As noted by the ONS, correlation of these demographic characteristics with depressive symptoms is not meant to imply causation.

In addition to the data made available by the ONS, NHS and the government[113] have also produced multiple articles on the impact of the pandemic on the mental health of patients[114] and staff[115]. What this means is that post-pandemic, the population as a whole is experiencing higher prevalence of depression, anxiety, PTSD, loneliness, and a decrease in life satisfaction, though variance between different groups within the population is significant.

Additionally, data made available by the government show that children's mental health was particularly impacted by the pandemic, with girls and young women, young adults (16-24) and children with disabilities or SEND-needs reporting more difficulties with their mental health.

One aspect of the long-term impact of COVID-19 on the mental health of individuals is the impact on those vulnerable to disordered eating. According to the NHS[116] and the Lancet[117] referrals to the Children and Young People with Eating Disorders Pathways doubled over the pandemic; there is limited information on adult referrals, but guidance published in 2019 suggests that the problem of eating disorders is not restricted to one age group[118].

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[111] https://www.guidelines.co.uk/news/record-number-of-mental-health-referrals-during-the-pandemic/456870.article
[112] https://www.ons.gov.uk/peoplepopulationandcommunity/wellbeing/articles/coronavirusanddepressioninadultsgreatbritain/julytoaugust2021
[113] https://www.gov.uk/government/publications/covid-19-mental-health-and-wellbeing-surveillance-report
[114] https://www.england.nhs.uk/mental-health/case-studies/severe-mental-illness-smi-case-studies/protecting-the-most-vulnerable-mental-health-patients-during-a-pandemic/
[115] https://www.gmmh.nhs.uk/news/carms-blog-the-impact-of-the-covid19-pandemic-on-the-mental-health-of-healthcare-workers-5061/
[116] https://www.england.nhs.uk/statistics/statistical-work-areas/cyped-waiting-times/
[117] https://www.thelancet.com/journals/lanchi/article/PIIS2352-4642(21)00094-8/fulltext
[118] https://www.england.nhs.uk/wp-content/uploads/2019/08/aed-guidance.pdf

5.2.2 Impacts of COVID-19 on the workforce

Many of the impacts that COVID-19 has had on the workforce have been explored previously in the report. While it is possible to point to events like lockdowns and restrictions around socialising as catalysts for major changes in the workforce, it is difficult to assess with a 100% certainty whether certain changes to the labour market would have occurred without it, or whether COVID-19 simply accelerated a previously existing problem.

To sum up some of the ways in which COVID-19 has impacted the workforce that have already been covered by this report:

- Many experienced workers left the industry after being furloughed or made redundant during the pandemic.
- Those workers who remained – particularly coaches and instructors – had the ability to set their rates higher than before, further driving up operational costs for providers.
- Recruitment and retention are extremely difficult, and turnover is very high. This, in turn, generates excess costs in productivity and in resources.
- A lot of new employees lack previous experience and need additional training and support.
- Training does not necessarily reach those who need it the most, or does not cover all the skills in demand.
- Single-track training is no longer enough, with various skills being in demand – digital, mental health first aid, and more.

Having said all of this, there were some impacts on the workforce that participants attributed specifically to COVID-19: the exodus of skilled workers; the rising cost of skilled labour; and the opportunities for employment that were missed out by students because of the pandemic. The latter was seen as having far-reaching consequences, as the lack of hands-on experience for future workers had a knock-on effect on recruitment and training times.

5.2.3 Impacts of COVID-19 on the providers

When asked about the ways in which the sector has changed since 2020, many participants pointed out the ways in which providers had to adapt in order to become "COVID-safe" – smaller class sizes, repurposing spaces, introducing new rules and restrictions around equipment, and more. As reported by participants, a lot of providers have not returned to how things were before the pandemic started – class sizes are still comparatively small, training halls are still being used as gyms (thus locking out any group that might use them for their own sport), and there are still rules around the sanitisation and usage of equipment in place.

Another impact has been the introduction of automated processes, with employees having to take on more roles. One participant talked about managers in leisure centres who also had to do housekeeping and hospitality tasks, simply because there were not enough staff available. Whilst automated self-check-ins and vending systems were useful during the pandemic, participants expressed concern that they had been rolled out too quickly, with no regard for visitors who might not be able to use these solutions as they are intended.

Beyond the frontline pressures providers faced, another impact that COVID-19 had on the sector was on the ability and mental health of fundraisers. As discussed by one participant, the prolonged isolation and working from home was detrimental to the parts of the workforce that focus on fundraising, which had a knock-on effect on the income of the provider. Additionally, the pandemic and successive lockdowns led to a lot of initiatives being stalled, indefinitely postponed, or cancelled completely, which will have a cumulative effect on the sector's ability to innovate for years to come.

One positive impact of COVID-19, as reported by some community hubs and community halls, was that the lockdown allowed them to carry out maintenance work and facility upgrades that would not have been possible in another year. Whilst some of those upgrades were necessary, others had been put off due to other priorities. Participants noted that once the work was finished, they were able to welcome new visitors, signpost their activities more effectively, and show the local community what is available to them on their doorstep. Even if some people were reluctant to come out after COVID, as one participant noted, community venues are seeing visitor numbers climbing.

All in all, while the COVID-19 pandemic accelerated some challenges for the sector, it was also an opportunity for providers to do "big brave things", as participants described them. It would be a stretch to describe the changes to the sector as a complete reset, as many of the problems described in this report are systemic and will take many years to address. Nevertheless, evidence from individual providers shows that there are any who used the pandemic as an opportunity to innovate and improve.

Indeed, the question currently facing the sector is not whether or not it will recover from COVID-19, but how it will be able to maintain positive momentum in the face of the cost-of-living crisis.

5.3 The impacts of the Cost-of-Living Crisis

Researchers have argued that the cost-of-living crisis that is being experienced in the UK has been many years in the making[119]. While events like Brexit, the war in Ukraine, and COVID-19 are shown to have exacerbated existing challenges, productivity and Gross Domestic Product per capita have been shown to weaken over time. Reasons given include declining investment, prices of discretionary items rising at a faster rate than the median household income, accumulating debt, and ecological debt[120], to name a few.

On a local level, in 2019 Greater Lincolnshire was home to several of the most deprived and under-served wards in England and Wales according to the Indices of Multiple Deprivation. Research from before the pandemic and during the pandemic showed that qualification levels were lower for Lincolnshire than they were for the rest of the East Midlands and the UK as a whole. Investment and economic growth were both declining over time, as evidenced both by the open data and by the testimonials of participants.

What this means is that, while the impact of COVID-19 has been the easiest to identify on the sector, the cost-of-living crisis will have much more long-term, lasting repercussions.

[119] https://theconversation.com/the-cost-of-living-crisis-has-been-many-years-in-the-making-but-politicians-on-both-sides-ignore-this-189483
[120] Overuse of natural resources.

5.3.1 Impacts of the Cost-of-Living crisis on individuals

Participants had mixed views on the way the cost-of-living crisis would impact individuals. Most of them talked about the negative consequences: the cutting of discretionary spending (e.g. gym memberships, unnecessary car trips, various activity clubs). Participants agreed that the least served communities would be hurt the most by the crisis; that it would have a chilling effect on the activities of women and girls, disabled communities, and those living in the most under-served wards in the county.

However, some participants also noted that the cost-of-living crisis might drive more people towards community centres, community hubs, and leisure centres. This could be because families might be looking to minimise their heating bill, or take advantage of free meal/free exercise programs. It was also felt that parents might prioritise their children's activities over their own, so there is a possibility that adult engagement in sport, physical activity, and leisure might drop while children's engagement remains stable or increases. Some participants noted that, if people chose to keep their gym membership, they might be more likely to use the facilities (like showers and complimentary towels) to save up on their bills at home.

As to what can be done to keep at-risk groups engaged in sport, physical activity, and leisure, participants seemed to agree that free activities are preferable, even if they result in a lot of 'no-shows'. As explained by interviewees, while they cannot guarantee numbers for free events, imposing fees would only serve to drive away the people who might need the intervention the most. Evidence from previous holiday activities and food programmes in Lincolnshire has shown that they are effective in reaching their intended populations, and there is nothing to suggest that these populations would engage better if there was a fee attached to the activity.

On a similar note, interviewees from community hubs talked about how they were effectively subsidising groups to have their activities in their centre by not raising their booking prices. Whilst interviewees agreed that this strategy was not beneficial to their bottom line, they did not want to pass the cost on to the groups and risk taking away activities from the local community.

The combination of local deprivation, lack of access to services, long travel distances, and costs of utilities create barriers to sport and physical activity in Greater Lincolnshire and Rutland that are felt particularly by those who are the least advantaged. Interviewees noted that while they do their best within their individual organisations, they can't do it all, and stressed that funding will remain among the highest, if not the highest, factors when it comes to the success of any given intervention.

5.3.2 Impacts of the Cost-of-Living crisis on the workforce

As with the section of the impacts of COVID-19 on the workforce, the way the cost-of-living crisis has manifested in worker shortages and under-employment (see Chapter 4). To recap some of the issues outlined, there is a need for interventions and for workers who are specifically trained in helping distinct groups of people: women and girls, disabled people, disadvantaged communities (especially on the Coast), religious and ethnic minorities and more.

Third sector organisations also noted the need for more professionals to support their sector – accountants, HR professionals, and business professionals were desperately needed in order to allow smaller, community-run organisations to thrive. At the same time, those organisations lacked the funds to bring those professionals onboard. Those that reported having funds pre-COVID also noted that most of their "war chest" had been spent during the pandemic.

When asked about the things concerning their workforce, survey respondents rated money and financial wellbeing as being overwhelmingly the most concerning (see Figure 44).

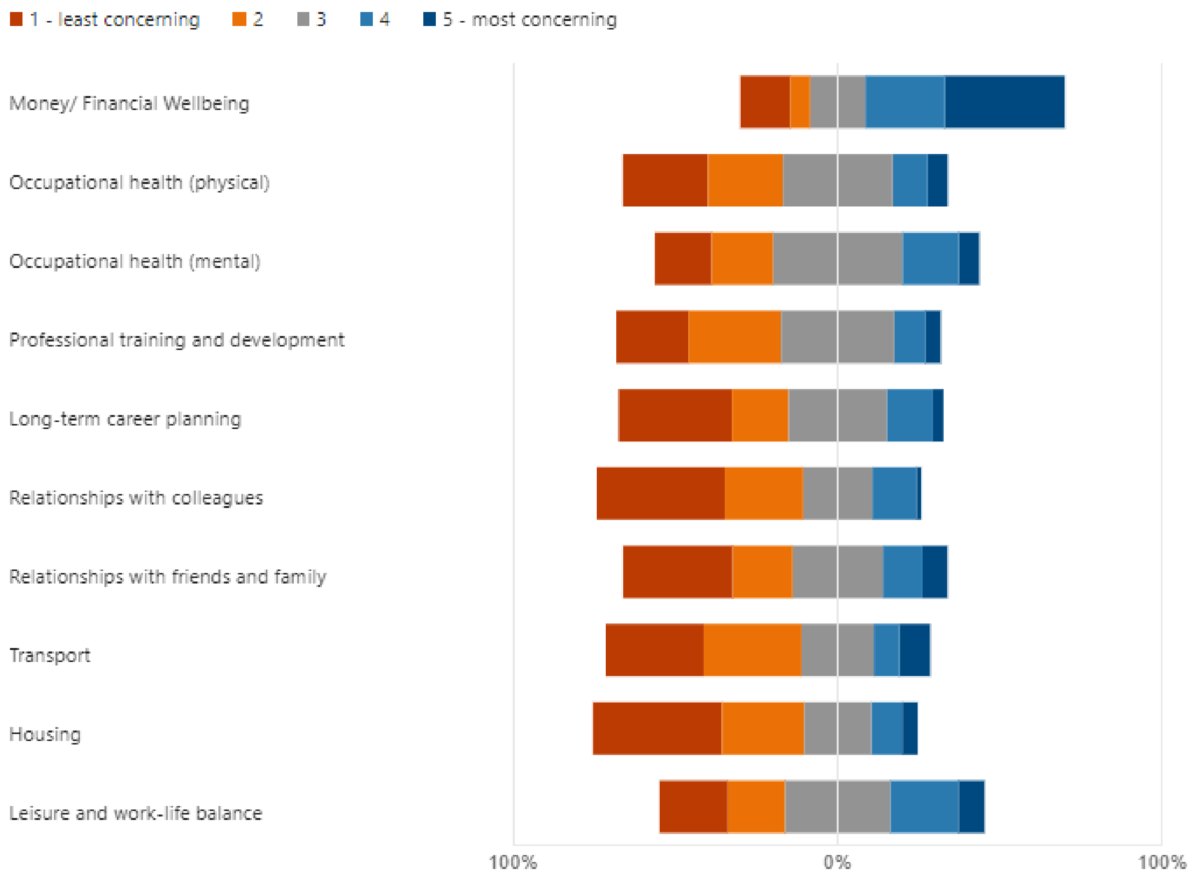

Figure 44: Survey Question 21: In your view, to what extent are the following things are a concern for your workforce?

Other observations that were voiced by participants during the Active Lincolnshire Stakeholder event in September 2022 regarding the impact of the cost of living crisis on staff included:

- Fuel costs/transport costs will likely reduce the options open to staff who travel to work.
- Higher demand for services will likely increase demand for staff.
- Working from home can lead to isolation, higher home fuel bills and can impact on productivity. This can also impact on the mental and physical health of staff – e.g. lonely or less physically active.
- Many front-line staff cannot work from home to save travel costs.
- Running on a skeleton staff to reduce travel costs might become the norm.
- Reduced funding and opportunities for CDP.
- Anticipated higher turnover of staff.

- Volunteering is seen as less attractive as people need to be earning money.
- Reduced number of student volunteers – students may take paid part time work instead of volunteering whilst studying.
- Reduced numbers of older volunteers as people retire later, or look for part time work once retired, rather than volunteering.

Participants in the stakeholder event also observed that the language used e.g. "volunteer" can be a problem as people feel that they need to have more commitment and this can put them off. The term "support staff" was suggested as perhaps being more attractive.

Participants also noted the perceived "shelf-life" for many roles in the sector. A concern was raised that, after a time, staff wanting to increase their income or develop their careers, such as coaches or instructors would need to move into management, or out of the sector.

Both these observations relate to findings from the survey and the interviews that have been discussed in chapter 4 of this report. Namely, the professionalisation of volunteering and the lack of clear career paths for individuals in the sector are two phenomena that will likely impact the supply of labour in the short- to medium-term in the sector.

However, as noted previously in this report, many of these challenges are systemic in nature and require a systemic response. While individual employers can take steps to address specific workforce concerns, certain issues would require a joined-up approach.

5.3.3 Impacts of the Cost-of-Living crisis on providers

When discussing the future challenges to the sector, both interview participants and survey respondents noted the rising costs of utilities and fuel as being one of the biggest concerns for them. Electricity and gas came up frequently in conversations as being major drivers of costs – floodlights for outdoor pitches, the heating of swimming pools, electricity and heat for gyms, electricity and heat for large sports halls, and more.

Many of these costs were being passed on to groups in the form of rent or surcharges for specific activities; those companies that didn't do so had to compromise in other ways, by either dipping into their reserves (if they have any) or by limiting office hours. The community or voluntary sector might be called on to provide access to buildings to bridge a gap in services, but these buildings tend to be old and energy inefficient (unless they have been renovated recently) and therefore these services are likely to be more expensive to run.

Across the board, it was felt that there is a need for more thinking outside of the box, moving away from guidelines, and towards more collaborative working between sectors. As described in Chapter 3 of this report, small providers can be very cost-effective, and they can provide a lot of value for money, but they also get overlooked in funding calls.

5.3 Recommendations

As demonstrated by this chapter, the workforce of the sport, physical activity, and leisure sector is staffed by many talented and skilled employees and volunteers. However, there is a growing demand for complex skills, limits to what training can be undertaken, and structural challenges to recruitment and retainment. As such, the recommendations that are put forward are aimed at addressing these challenges:

- Big, bold thinking needed, both for sector recovery and sector resilience.
- Community-centred approaches to resource distribution. Examples include:
    - Direct community engagement to deliver what is needed. (See Chapter 2 for more details,)
    - Two-way conversations with community leaders.
    - Lobbying and investment for local solutions and local providers.
- Putting mental health in the centre of programs. Examples include:
    - Developing resilience by addressing individual, organisational, and systemic barriers to working.
    - Developing resilience by addressing individual, organisational, and systemic barriers to engagement with the sector.
    - Lobbying and investment for bespoke programs, addressing individual concerns rather than one-size-fits-all approaches.
- Empowering employees in the workplace. Examples include:
    - Skills, training, and investment in long-term career paths.
    - Addressing the barriers to work.
    - Mentoring and skills development for people who have been out of the workplace for a while.
    - Mentoring and skills development for people who struggle with chronic health conditions, including long COVID.
- Increasing investment in skills and development of long-term career paths. Examples include:
    - Multi-skilled training.
    - Highlighting those with unconventional career paths.
    - Investment in on-the-job training.
    - Investment for year-long employment.
    - Engaging with and addressing the concerns of employees.
- Increasing investment in volunteers and volunteering. (See chapter 4 for more details.)
- Increasing support for frontline staff. (See chapter 4 for more details.)
- Increasing the economic resilience of enterprises. Examples include:
    - Investment in micro businesses, CICs, and charities.
    - Investment in partnership working between the public, private, and third sector.
    - Lobbying for and investment in continuity planning for local programs, preserving local knowledge, and maintaining skills.
    - Helping companies invest in long-term sustainability planning (such as energy independence, insulation, energy-efficient practices, recycling and upcycling of equipment, and more.)
    - Helping companies implement short- and medium-term efficiencies (such as minimising staff turnover.) (See chapter 1 for more details.)

Chapter 6: Conclusions and Recommendations

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?

It is difficult to summarise all the findings, but in brief, the research indicates the following:

1. The sector has a combined GVA of £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. 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.
2. 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 in order to better understand their needs.
3. 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. In order 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.
4. 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 in order to address it.
5. 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.

Appendix A: Demographic Breakdown of Survey Respondents

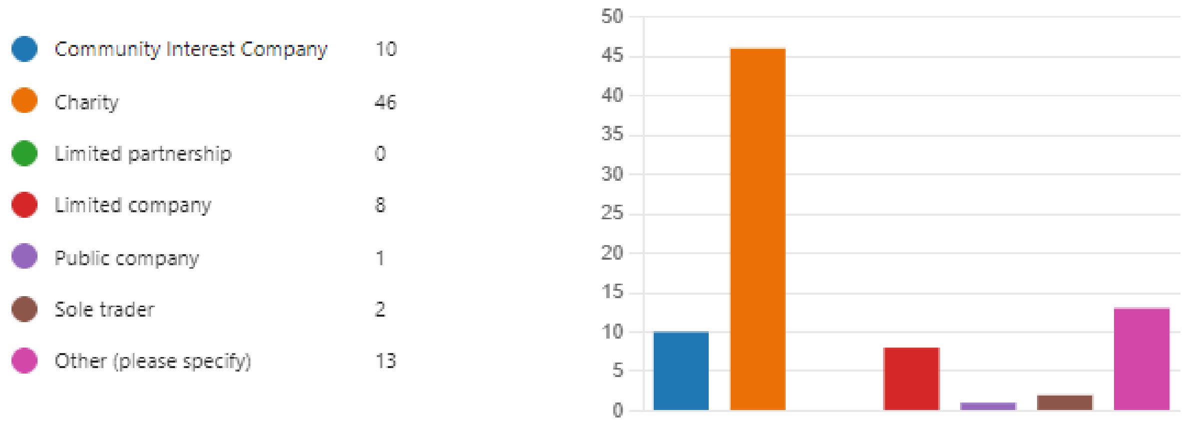

Figure 45: Survey respondents by business type

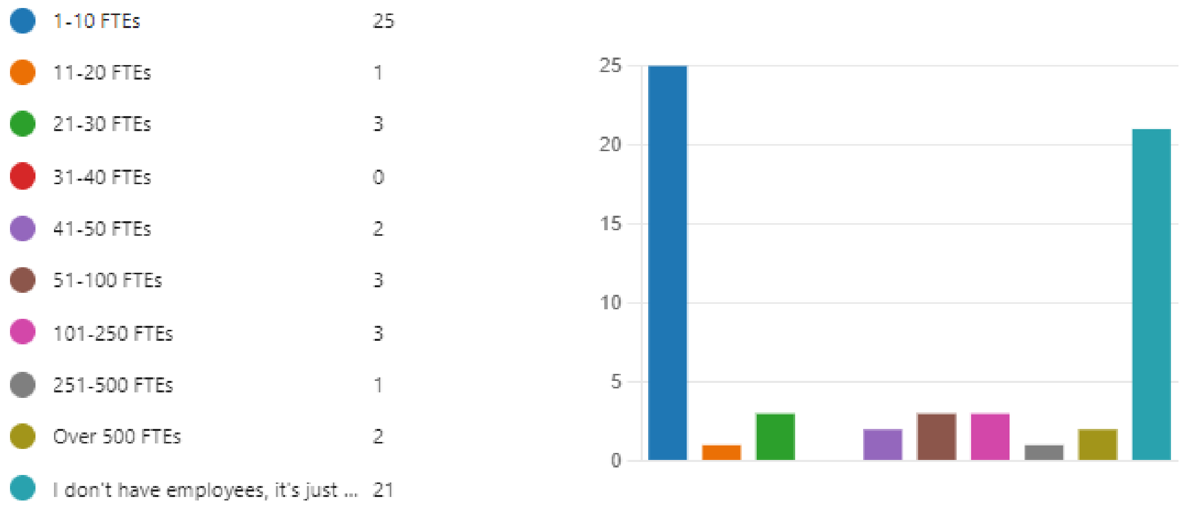

Figure 46: Survey respondents by number of employees

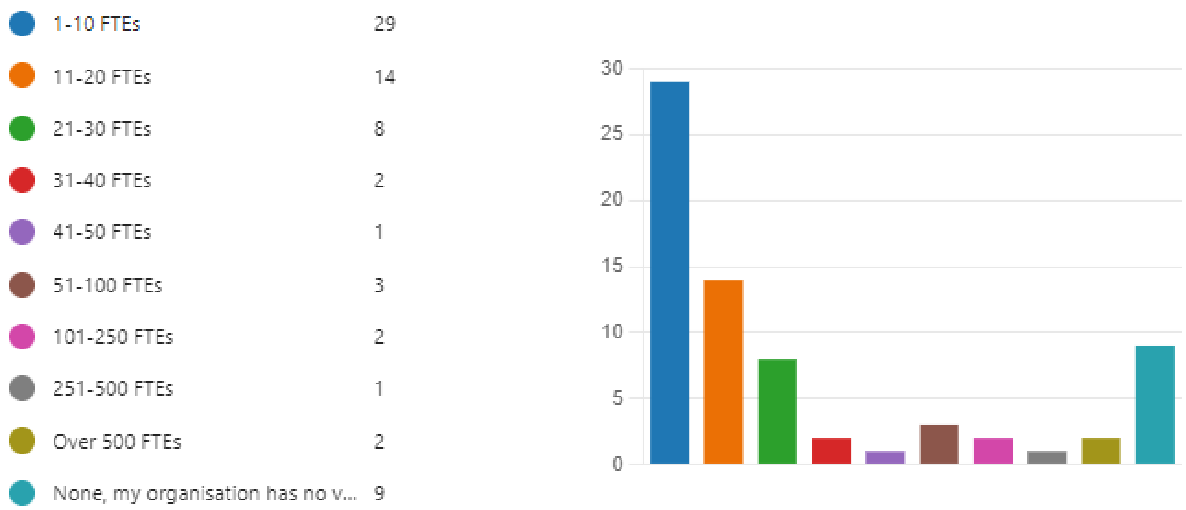

Figure 47: Survey respondents by number of volunteers

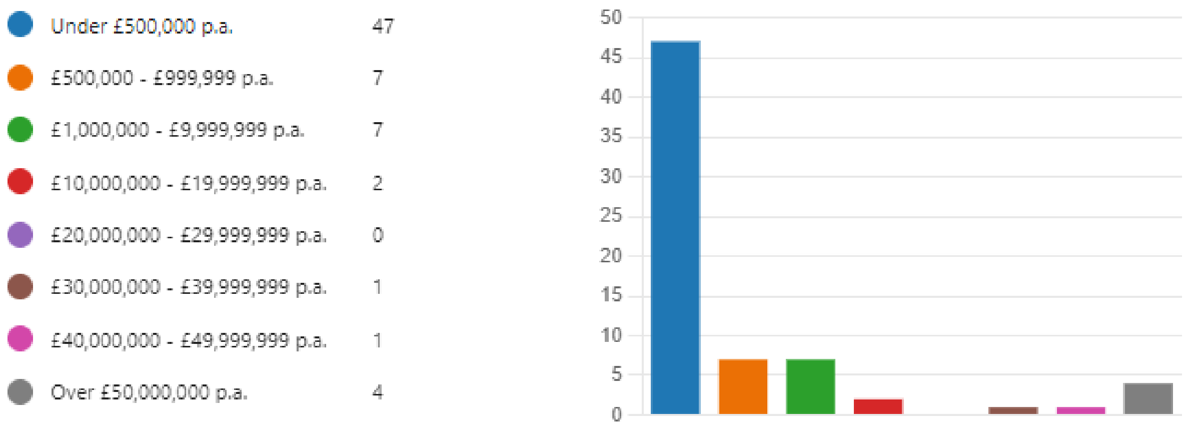

Figure 48: Survey respondents by annual turnover

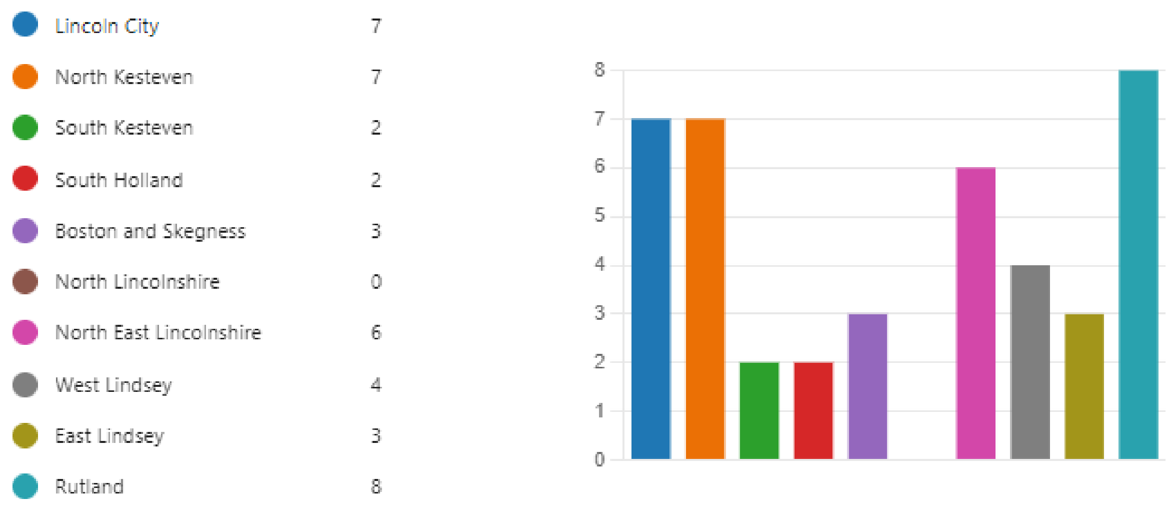

Figure 49: Distribution of survey respondents (where declared)

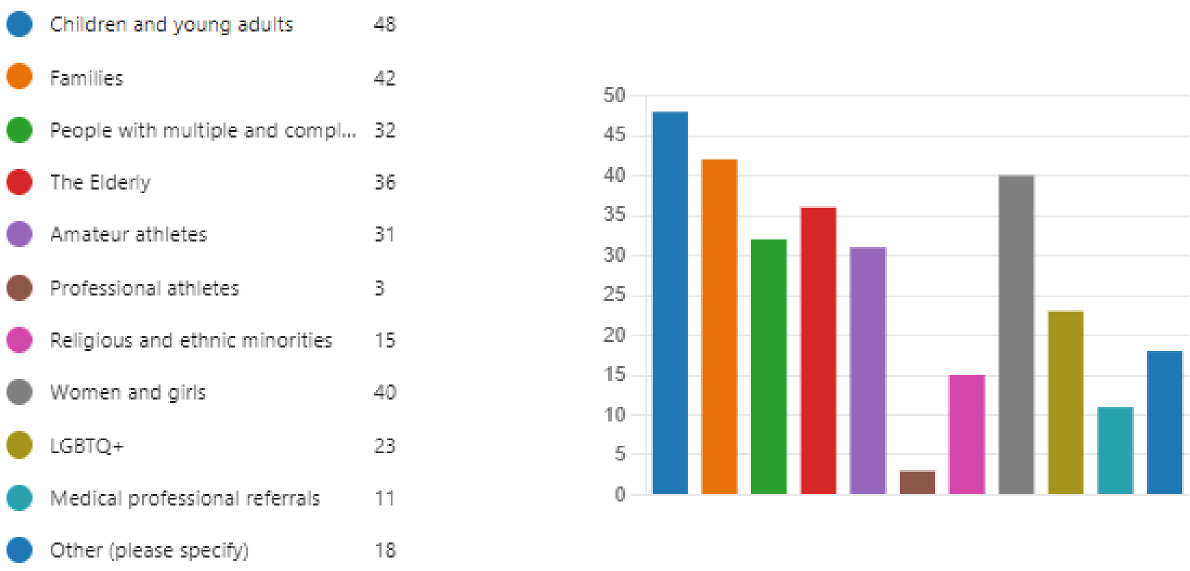

Figure 50: Survey respondents by groups organisation works with

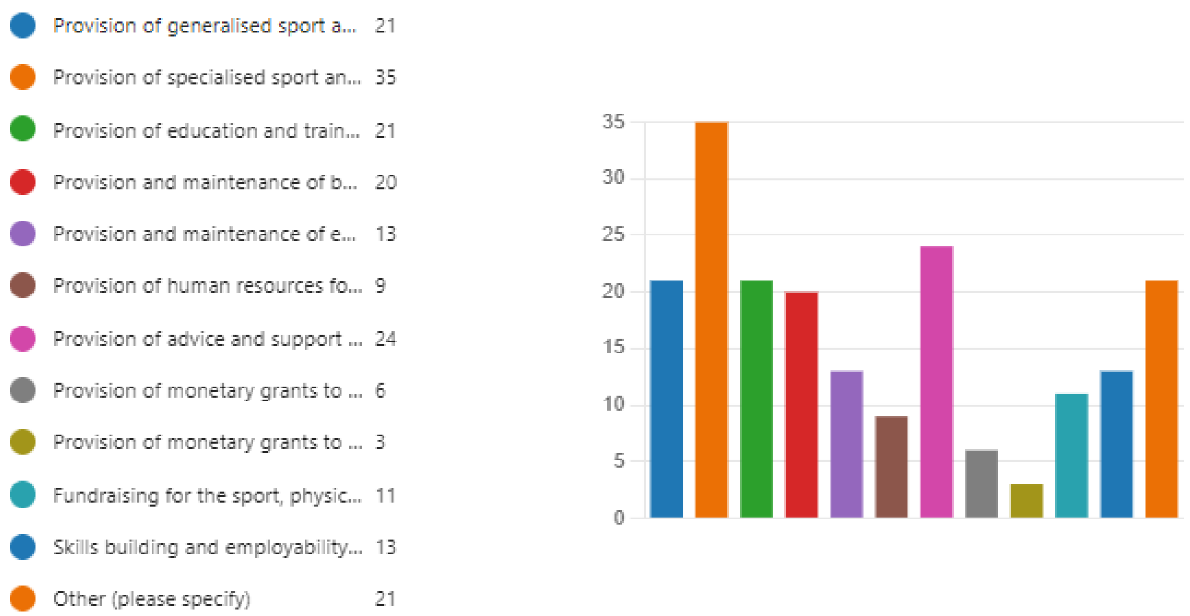

Figure 51: Survey respondents by organisation activity

Appendix B: 2011 Census Data - Ethnicity

Ethnic Group	Boston	East Lindsey	Lincoln	North Kesteven	South Holland	South Kesteven	West Lindsey	Rutland	North East Lincolnshire	North Lincolnshire	% of Greater Lincolnshire & Rutland Population
All categories: Ethnic group	64,637	136,401	93,541	107,766	88,270	133,788	89,250	37,369	159,616	167,446	
White: Total	62,592	134,314	89,379	105,835	86,370	130,394	87,600	36,301	155,421	160,748	97.30%
White: English/Welsh/Scottish/Northern Irish/British	54,221	131,717	83,653	103,343	79,569	125,261	85,977	35,241	152,240	154,526	93.29%
White: Irish	208	490	719	512	282	656	411	217	414	727	0.43%
White: Gypsy or Irish Traveller	63	61	80	74	100	78	161	58	26	90	0.07%
White: Other White	8,100	2,046	4,927	1,906	6,419	4,399	1,051	785	2,741	5,405	3.50%
Mixed/multiple ethnic group: Total	664	937	1,230	791	796	1,142	630	389	1,186	1,244	0.84%
Mixed/multiple ethnic group: White and Black Caribbean	171	414	367	242	247	410	222	123	381	341	0.27%
Mixed/multiple ethnic group: White and Black African	114	87	189	91	138	138	58	23	161	166	0.11%
Mixed/multiple ethnic group: White and Asian	167	261	372	256	233	304	205	141	369	451	0.26%
Mixed/multiple ethnic group: Other Mixed	212	175	302	202	178	290	145	102	275	286	0.20%
Asian/Asian British: Total	928	789	1,794	750	747	1,580	728	365	2,129	4,549	1.33%
Asian/Asian British: Indian	374	231	522	217	251	509	370	113	513	1,122	0.39%
Asian/Asian British: Pakistani	148	63	139	29	48	93	64	38	195	862	0.16%
Asian/Asian British: Bangladeshi	72	100	139	68	54	63	0	7	268	1,443	0.21%

Asian/Asian British: Chinese	130	198	452	215	176	436	130	125	605	530	0.28%
Asian/Asian British: Other Asian	204	197	542	221	218	479	164	82	548	592	0.30%
Black/African/Caribbean/Black British: Total	278	264	778	251	257	509	224	251	411	494	0.34%
Black/African/Caribbean/Black British: African	174	160	504	108	137	330	127	116	306	365	0.22%
Black/African/Caribbean/Black British: Caribbean	57	75	165	101	72	117	74	107	71	64	0.08%
Black/African/Caribbean/Black British: Other Black	47	29	109	42	48	62	23	28	34	65	0.05%
Other ethnic group: Total	175	97	360	139	100	163	68	63	469	411	1.22%
Other ethnic group: Arab	63	40	175	43	13	48	38	5	265	173	0.08%
Other ethnic group: Any other ethnic group	112	57	185	96	87	115	30	58	204	238	0.71%

Appendix C: Prevalence of Depression, Dementia and Other Mental Health Difficulties Across Greater Lincolnshire and Rutland

	Depression Prevalence							Dementia Prevalence							Other Mental Health Prevalence				
	2018-19			2019-20				2018-19			2019-20				2018-19			20	
NHS Area	List size ages 18+	Register	Prevalence (%)	List size ages 18+	Register	Prevalence (%)	Average Year on year change	List size ages 18+	Register	Prevalence (%)	List size ages 18+	Register	Prevalence (%)	Average Year on year change	List size ages 18+	Register	Prevalence (%)	List size ages 18+	Register
Lincolnshire	633845	74190	11.53847756	648768	82251	12.5259144	0.92	780401	7539	0.931673	798699	7821	0.942839	0.01	780401	6447	0.829117	798699	6400
Rutland	30631	2848	9.743085697	31130	3124	10.5135997	0.77	38634	367	0.854921	39119	358	0.833486	-0.02	38634	271	0.639049	39119	261
North East Lincolnshire	134899	13582	9.766205216	135277	14870	10.49841217	0.73	170074	1557	0.787635	170358	1562	0.797669	0.01	170074	1664	1.143671	170358	1540
North Lincolnshire	144679	18417	12.92339837	145843	20033	13.96695455	1.04	180334	1486	0.770191	181658	1542	0.77891	0.01	180334	1406	0.782826	181658	1394
Total	**944054**	**109037**	**10.99279171**	**961018**	**120278**	**11.87622021**	**0.87**	**1169443**	**10949**	**0.836105**	**1189834**	**11283**	**0.838226**	**0.00**	**1169443**	**9788**	**0.848666**	**1189834**	**9595**

Appendix D: Survey Questions

1.Please declare that you have read and understood the above terms.

○ I have read and understood the terms of this research, and consent for my data to be used in the manner described

2.Please select a memorable word. You will need this when requesting a copy of your data or requesting for your data to be deleted.

3.What is the best way to describe your organisation? (please select all that apply)

☐ Community Interest Company

☐ Charity

☐ Limited partnership

☐ Limited company

☐ Public company

☐ Sole trader

☐ Other (please specify)

4.If you answered other to the question above, please use this space to describe your organisation:

5.How many employees do you have?

○ 1-10 FTEs

- 11-20 FTEs
- 21-30 FTEs
- 31-40 FTEs
- 41-50 FTEs
- 51-100 FTEs
- 101-250 FTEs
- 251-500 FTEs
- Over 500 FTEs
- I don't have employees, it's just me in the company

6.How many volunteers do you have? (Including Trustees)

- 1-10 FTEs
- 11-20 FTEs
- 21-30 FTEs
- 31-40 FTEs
- 41-50 FTEs
- 51-100 FTEs
- 101-250 FTEs
- 251-500 FTEs
- Over 500 FTEs
- None, my organisation has no volunteers

7.What is your annual turnover/income?

- Under £500,000 p.a.
- £500,000 - £999,999 p.a.
- £1,000,000 - £9,999,999 p.a.
- £10,000,000 - £19,999,999 p.a.
- £20,000,000 - £29,999,999 p.a.
- £30,000,000 - £39,999,999 p.a.
- £40,000,000 - £49,999,999 p.a.
- Over £50,000,000 p.a.

8.Please describe the activities of your company (select all that apply):

☐ Provision of generalised sport and leisure activities

☐ Provision of specialised sport and leisure activities

☐ Provision of education and training in the sport, physical activities, and leisure sector

☐ Provision and maintenance of buildings, open spaces, and other spaces for sport, physical activities, and leisure

☐ Provision and maintenance of equipment aimed at the sport, physical activity, and leisure sector

☐ Provision of human resources for the sport, physical activity, and leisure sector

☐ Provision of advice and support for people seeking to engage with sport, physical activity, or leisure

☐ Provision of monetary grants to organisations that are in the sport, physical activity, and leisure sector

☐ Provision of monetary grants to individuals to engage in the sport, physical activity, and leisure sector

☐ Fundraising for the sport, physical activity, and leisure sector

☐ Skills building and employability through the sport, physical activity, and leisure sector

☐ Other (please specify)

9.If you answered "other" to the question above, please use this space to give a brief description of your activities:

10.With which groups to you work? (select all that apply)

☐ Children and young adults

☐ Families

☐ People with multiple and complex needs

☐ The Elderly

- ☐ Amateur athletes
- ☐ Professional athletes
- ☐ Religious and ethnic minorities
- ☐ Women and girls
- ☐ LGBTQ+
- ☐ Medical professional referrals
- ☐ Other (please specify)

11.If you answered "other" to the question above, please use this space to further elaborate:

12.Where is your organisation based in?

- ○ Lincoln City
- ○ North Kesteven
- ○ South Kesteven
- ○ South Holland
- ○ Boston and Skegness
- ○ North Lincolnshire
- ○ North East Lincolnshire
- ○ West Lindsey
- ○ East Lindsey

Rutland

13.To what extent do you agree with the following statements about motivations to get engaged with activities? (rank from strongly agree to strongly disagree)

People don't engage with sports and leisure activities because of cost

People don't engage with sports and leisure activities because of time

People don't engage with sports and leisure activities because they have to travel too far

People don't engage with sports and leisure activities because they don't feel safe

People don't engage with sports and leisure activities because they don't feel confident in themselves

People don't engage with sports and leisure activities because they don't feel confident in the providers

People don't engage with sports and leisure activities because they think they're "for other people"

14.Please use this space if you would like to elaborate further on your answers to the last question:

15.To what extent are the following a challenge for your organisation? Please rank from 1 to 5, 1 being least challenging to 5 being most challenging.

Obtaining funding

Collaborative working

Responding quickly to demand

Recruitment

Retention
Professional training and development
Workforce morale
Engaging with existing clients
Engaging with new clients
Developing new programs of activity
Scaling up existing programs of activity
Occupational health
COVID-safety protocols
Engaging with the wider health sector

16.Please use this space if you would like to elaborate further on your answers to the last question:

17.In your experience, what are the top 3 opportunities for the sector?

18.In your experience, who are the people that need the most support to access sport and leisure activities?

19. To what extent do you agree with the following statements about your workforce? (employees and volunteers)

Our workforce is highly skilled

Our workforce is highly motivated

Our workforce has a long-term career plan in our company

Our workforce is with us throughout the year

Our workforce is diverse

Our workforce is collaborative

Our workforce is responsive to client needs

Our workforce has a good work-life balance

We invest in our workforce

Our workforce is representative of the communities we serve

20.Please use this space if you would like to elaborate further on your answers to the last question:

21.In your view, to what extent are the following things a concern to your workforce? Please rank them 1 to 5, 1 being least concerning, 5 being most concerning.

Money/ Financial Wellbeing

Occupational health (physical)

Occupational health (mental)

Professional training and development

Long-term career planning

Relationships with colleagues
Relationships with friends and family
Transport
Housing
Leisure and work-life balance

22.Please use this space if you would like to elaborate further on your answers to the last question:

Appendix E: Indicative Interview Schedule

1. To start with, can you please tell me about your organisation and your role in it? What are your main activities?
2. To what extent would you say the sector has changed since 2020? In what ways?
3. What is the current makeup of your workforce? For example, do you tend to employ a lot of graduates? Locals? Is your workforce seasonal or year-round?
4. What are the sorts of skills that you are looking for in your organisation? What are the sorts of skills that you think are in short supply?
5. What are the groups that you think engage best with your activities? What about the groups that engage the least well with your activities?
6. What are the sorts of clients or beneficiaries that you would like to work with?
7. What are the top three biggest challenges to the sector, in your opinion?
8. What are the top three biggest opportunities for the sector?
9. Blue skies thinking, what sort of support would you like your organisation to get in the future?
10. Are there any good practices that you would like to share with the wider sector?