



Recovery modelling



Following the 98% accuracy of the national recovery projections following the first lockdown period, 4global have generated recovery curves for each activity and tier of restrictions, post the second period of national restrictions.

These may provide a useful reference point when completing projections for participation levels between December 2020 and March '21. Nationally representative outcomes from recovery modelling for each activity type and tier of restrictions are provided below, followed by overarching participation curves for the period January '20-March '21 and the fund period December '20-March '21.

These have been calculated considering:

- DataHub participation data from 2015-20
- DataHub participation data from the period between lockdowns (Aug-Nov 2020)
- Leisure-Net Post Lockdown 2.0 recovery survey results
- Sport England ComRes polling
- Recovery statistics from other countries
- Government restrictions and guidelines

(<https://www.gov.uk/guidance/working-safely-during-coronavirus-covid-19/providers-of-grassroots-sport-and-gym-leisure-facilities>)

The recovery curves have been generated using weekly calculations for each activity type in each tier.

The table below provides a four-month average (Dec-March) for each tier.

Some key considerations that have influenced these predictions:

- Recovery rates for individual tiers reflect the different restrictions. For instance, group workout is not permitted in Tier 3.
- For the purpose of this exercise, it's assumed restrictions will stay the same until the end of March '21.
- 'Other' contains all facility types and activities not contained in the above categories, including soft play and climbing.

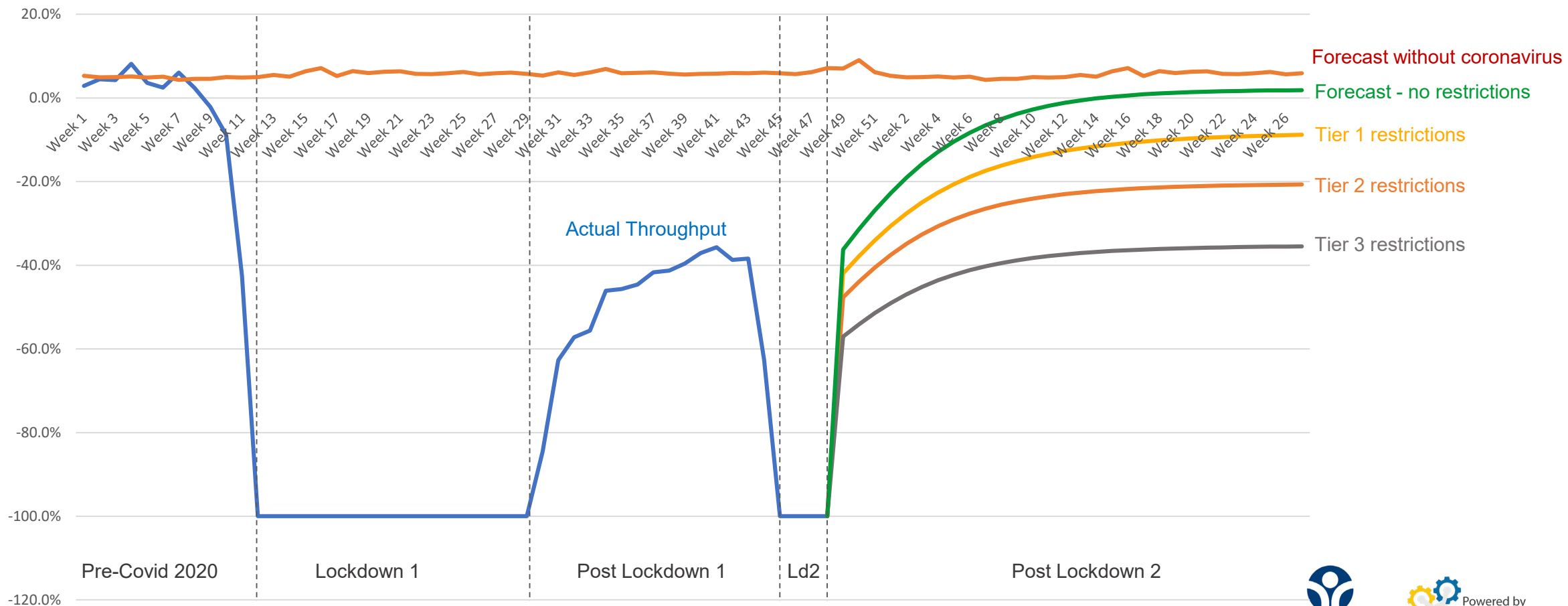
When applying these percentage recovery models to participation projections, it will be important to consider local factors including:

- Facility mix and make up
- Re-purposing of facilities (group workout being completed in a sports hall would still be considered group workout)
- Centre closures and changes to opening hours
- Other local trends that may not be picked up in national models.



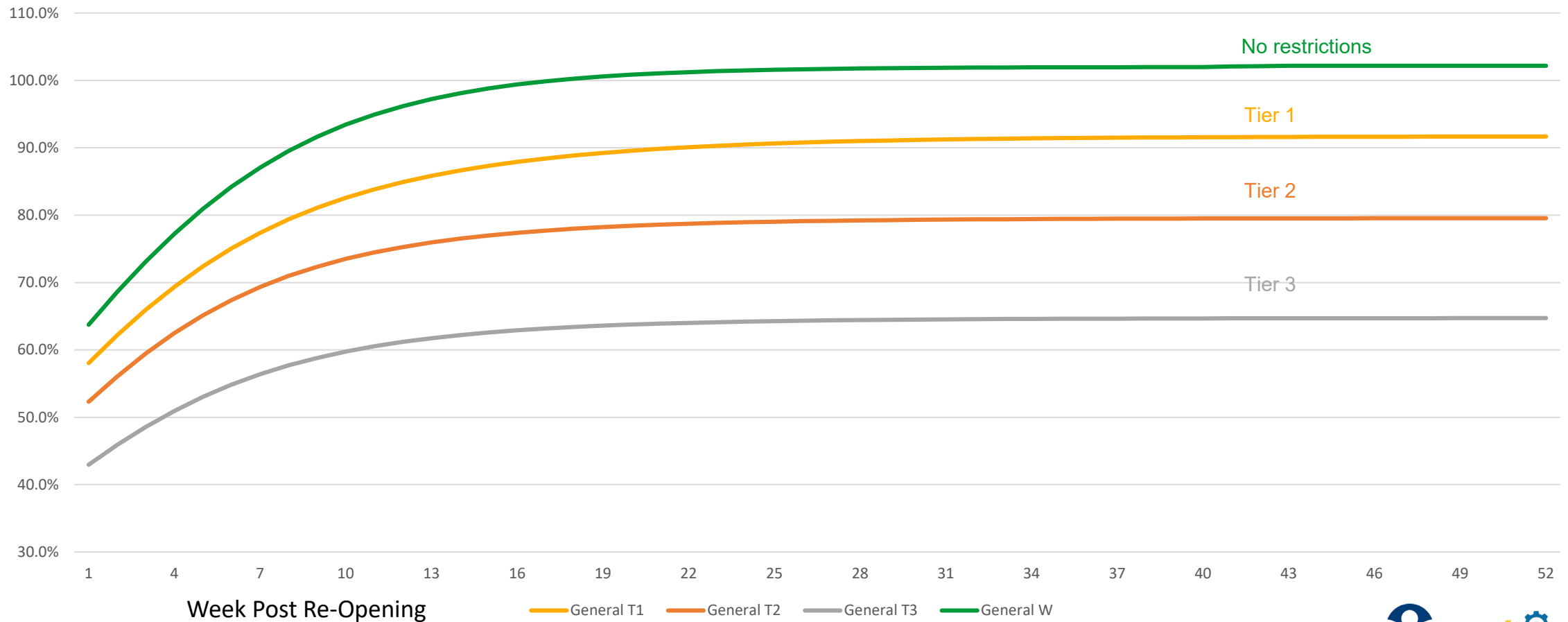
Throughput recovery percentage – coronavirus period

Recovery Journey: Jan 2020 - Mar 2021 Actuals & Forecasts



Recovery percentage post lockdown 2.0 – Tier 1/2/3

Total Throughput Recovery After Lockdown 2.0





Recovery percentage – activity type/tier

The recovery curves have been generated using weekly calculations for each activity type in each tier. The table below provides a four-month average (Dec-March) for each, per tier.

Activity Types	Tier 1	Tier 2	Tier 3
Gym	87.1%	84.3%	82.9%
Group workout	70.2%	53.4%	0.0%
Swim lesson	87.6%	84.9%	82.3%
Swim	81.6%	75.4%	71.9%
Sports hall	75.9%	55.7%	31.8%
Outdoor	93.3%	89.3%	84.8%
Other	68.5%	56.3%	43.0%
Total sector average	78.4%	69.9%	56.9%



National Leisure Recovery Fund questions?
Please contact – queries@nationalleisurerecoveryfund.co.uk

Questions relating to the modelling presented?
Please contact – Research.Team@4global.com

