



## Understanding the Impact of Covid-19

**How might people behave  
as restrictions ease?**

**What will people be  
looking for as they return  
to activities?**

April 2021

### How to use:

Open this document in  
PowerPoint (not Teams preview).

Navigate in **slide show mode** then  
click on the menu above.





## Key insight

The vaccine rollout is having a progressively positive impact on attitudes towards taking part in physical activity

Some people will return straight away, and others will take longer – especially to indoor settings

For some people, a sense of reduced fitness is impacting motivation

The onset of spring brings a sense of optimism and renewed motivation

Outdoor settings will continue to be important to support physical activity

People may prioritise flexible memberships, trials and one-off payments

Why this is important





## Why this is important

### **This matters because research shows being active has huge benefits for our physical and mental health.**

Those who are active are happier, and being active equips us with essential life skills and also connects and strengthens communities.

It has huge value to the nation's economy – directly through productivity and by supporting the health of the population.

### **Reduction in activity levels**

People are keen to be active, with 58%<sup>1</sup> saying they would like to do more physical activity once Covid-19 restrictions are removed. However, since the outbreak:

- Coronavirus has caused a drop in the activity levels of both adults and children.
- This is owing to restrictions in what has been permitted (opportunity) and also a drop in people's motivation and sense of capability to be active.

### **2021 lockdown has been tough for many people**

- Research indicates that the 2021 lockdown has been extremely tough for people, because opportunities to be active have been restricted, and the timing of the lockdown coincided with colder, darker months.
- The cumulative impact of multiple changes has reduced people's headspace, mental bandwidth and motivation to make the choice to be active.

### **No guarantee that people will return**

- Even when society opens up and activities are offered / become available there is no guarantee that people will return.
- Affordability may be a challenge, with people continuing to be financially impacted longer-term.
- Changes to working patterns, caring responsibilities, personal management of risk, worries about contracting / spreading the virus or anxieties about social mixing could continue to impact behaviour.



## How are people currently feeling?

**Whilst autumn and winter took their toll on mood and motivation, the vaccine roll out and easing of restrictions is creating a growing sense of cautious optimism.**

People are switching into a 'planning mindset' as restrictions ease with almost half (46%<sup>2</sup>) of people agreeing that the plan to relax lockdown restrictions has got the balance about right.

Many people are looking forward to seeing family and friends again as well as re-connecting with themselves in simple ways. People say they are most looking forward to going to a restaurant, getting a haircut and going shopping<sup>3</sup>.

Activity is high on the list of importance and overall, people are showing a growing appetite to do more physical activity and exercise.

Some people are cautious about returning to organised physical activity as soon as the rules allow (particularly indoor settings).

There is a hope that the easing of restrictions, coupled with improving weather conditions, will support people to be able to increase activity levels over time.

“ *I am confident that our gym will do their utmost to make it feel as safe as possible.*

*I'm obviously quietly conscious about my own personal space, as well as the space of those around me, and so think that whilst that continues to be adhered to, I'll be happy to return to reduced number classes.*

- Male, 35 - 54





## Spring feels like a new chapter

**Finer weather and longer, lighter days are motivation for people to get moving.**

The availability of more social opportunities outdoors as a result of easing restrictions, could play a key role in helping people to maintain and initiate physical activity habits.

The turn of the season is prompting a new-found motivation for people to be active. The appetite to undertake more activity has grown significantly since summer 2020, with approaching three quarters of adults (excluding those who aren't sure) saying they would like to be doing more physical activity<sup>4</sup>.

Seven in 10 adults\*<sup>5</sup> say that they have used exercise to manage their mental health during the pandemic – highlighting its important link to wellbeing, and the opportunity afforded by the arrival of better weather and relaxation of restrictions.

Barriers such as colder weather, not being able to see loved ones and not doing their 'usual' activities during the winter period meant that people had to rely heavily on intrinsic motivation – i.e. their own willingness, emotional connection or personal goals to maintain physical activity habits and routines.

The onset of spring and the easing of restrictions provides an opportunity for extrinsic motivations to also play a role in supporting people's physical activity habits. Examples include:

- Warmer weather and lighter evenings
- Enjoying springtime sights, sounds and smells
- Opportunities to meet up with friends and family
- Making plans for holidays or trips away

Whilst many people are still cautious, the vaccine programme is prompting a general sense that things are starting to improve.

“ *Just went for a stretch in the garden – it's chilly but lovely signs of spring with the daffodils and birdsong. Life in lockdown has really made me appreciate little things like this – the little things nature gives us every day.* ”

- Female, 35 - 54

\* Excluding those who responded 'don't know'



## Impact of the vaccine

**The rollout of the vaccine is steadily having a positive impact on people's attitudes towards taking part in physical activity. It is not, however, viewed as a silver bullet.**

Positively, two fifths (41%)<sup>6</sup> of adults agree that the rollout of the vaccine will make them more likely to participate in sport and physical activity.

The number of adults agreeing that they feel less worried about doing sport and physical activity now the vaccine is being distributed, increased between January and March. Most recently, over half of adults agreed that they felt less worried (51% in March 2021 compared to 40% in January 2021<sup>7</sup>).

People aged 16 – 34, those in higher socioeconomic groups and people who have children are amongst the most likely to agree the vaccine roll out has made them feel less worried.

Noticeably, some of the groups who have been most worried and/or anxious throughout the pandemic are expressing a greater degree of caution.

People aged 55+ and those with longstanding illness and/or conditions (in particular physical conditions) are significantly less likely to agree that the vaccine rollout has made them feel less worried.

People from Asian, Chinese and Mixed backgrounds are more likely to agree that they worry about leaving their homes to be active. As such, people within these groups might continue to be cautious about the activities they participate in.

“ *The vaccine rollout is really boosting my confidence but I will still need to wait and see how I feel in the Summer.* ”

- Female, 55+



## Reduced fitness is impacting motivation

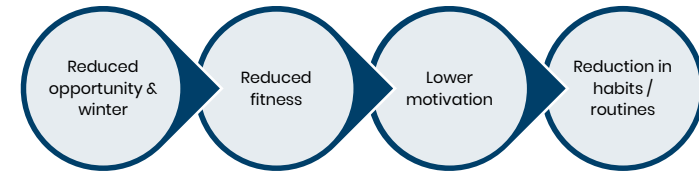
**Fewer opportunities to be active, coupled with more time spent indoors during the winter, has led to many people feeling as if their fitness has reduced and, as such, has driven down motivation to maintain physical activity habits.**

Presently, the biggest reported challenge to being physically active is feeling 'too tired or lacking energy'. In addition to this 'I'm not fit enough', also features amongst the top four challenges<sup>8</sup>.

People tell us they've drifted into less healthy patterns of behaviour, such as being more sedentary and snacking, which understandably makes their starting point feel harder.

This is particularly affecting young and middle-aged women and those who care for others, including children and vulnerable family members.

### Negative cycle



“ *The very cold weather we had in winter stopped me doing all outside exercise. I tried to continue exercise classes indoors but wasn't really enjoyable and I lost all motivation to do this.* ”

- Male, 35 - 54

“ *Really looking forward to the gyms opening as I am planning on going there four times a week...I think for a lot of people including myself, motivation is low.* ”

- Female, 35 - 54



## Gradually build fitness levels up

Restrictions easing and greater opportunities to be active along with better weather will help to increase motivation.

People told us that they felt optimistic that the next few months would provide them with the chance to make small changes to their daily lives and build their fitness levels back up.

Simply promoting the idea that 'physical health is good for mental health' in isolation could be ineffective.

For those who are already aware of the benefits, this message may act as a further barrier by provoking feelings of guilt.

**In order to break negative cycles, support should place an emphasis on:**

- Self-compassion
- Acknowledging and sharing struggles with others
- Building confidence and fitness up gradually

“ *When restrictions lift in April and May I will again have a purpose in walking into town to the shops, and things like craft fairs will start up again, so I will hopefully get back to the physical activity levels I would usually be at.* ”

- Female, 55+

“ *Our walking football sessions resume in a couple of weeks too, but we've already spoken about that and we're going to ease our way back in with light training sessions.* ”

- Male, 55+



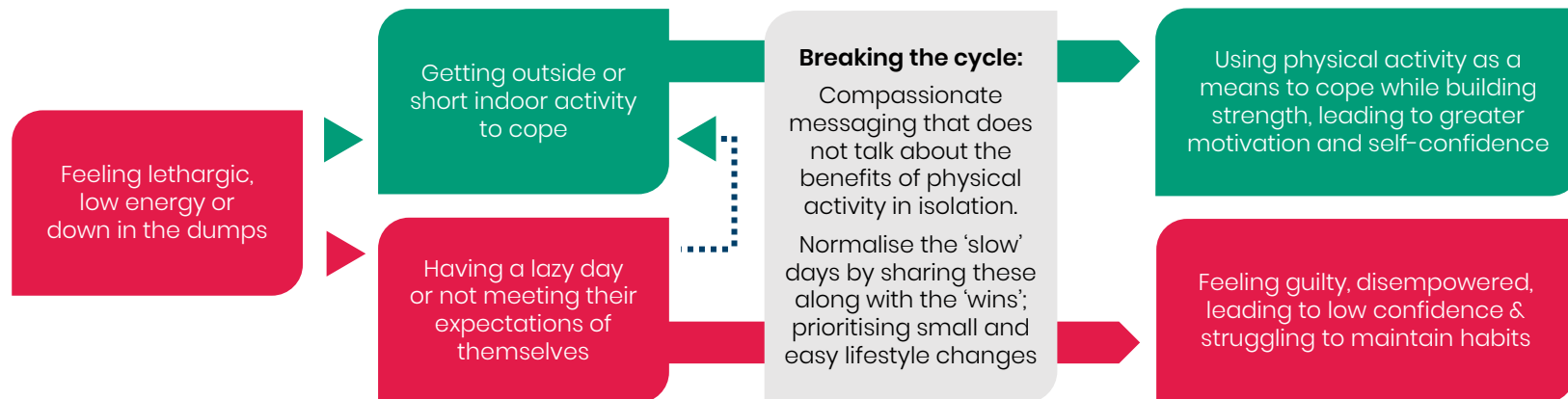


## The importance of being active is well understood

**A barrier to being more active is not lack of understanding of its importance – this is well understood.**

**Research continues to highlight the need to tackle emotional barriers which have been exacerbated by the pandemic.**

Some people feel guilty about their lack of motivation; they need to feel as if they are not alone, that it is normal / ok to feel like this in order to feel less alone, and empowered to make positive changes.





## Flexible memberships, trials and one-off payments

**There is a tendency to want to avoid financially committing to memberships, with many prioritising flexibility, new trials and one-off payments and services, or finding free resources online.**

The main viewpoint expressed is the need for paid services to be low cost and flexible.

There are a variety of perceptions linked to affordability. For many, Covid-19 restrictions have disproportionality affected household incomes, straining finances.

People aged 16 to 24, women, low paid workers, disabled people and people from Black, Pakistani, Bangladeshi and Mixed backgrounds are more likely to have been affected financially as a result of the coronavirus outbreak<sup>9</sup>.

Others have told us that they have saved money during the pandemic, meaning that it is not necessarily cost which is always the main barrier; rather, people tend to be unwilling to sign into long-term contracts.

Key drivers to encourage the return to paid memberships, are either the equipment; social and community benefits; and the access to expert instructors and coaches.

### Drivers for paying for subscriptions and memberships

Free trial and cost offers

Pay as you go options

Short-term contract options

Ensuring it is easy to cancel

Access to equipment

Access to a social network

Access to expertise



## How might people behave as sport and physical activity reopens?

Nearly two fifths (39%)<sup>10</sup> of adults say they have found new ways to be active since the start of the pandemic. An overwhelming majority (84%)<sup>11</sup> intend to continue with these activities as restrictions ease.

It's expected that the initial phase of easing restrictions will follow a similar pattern to summer 2020:

Some people will return to the gym, leisure centres and organised sport straight away; others will take their time

The ability to do more socially will allow people to lead more active lives

Outdoor activity will remain increasingly important – especially to those groups who are more worried and anxious

Some people will continue with their lockdown routines because of safety concerns or changes in preference



## Intention to return

**At least two thirds of adults who took part in activity before the pandemic intend to return to it. Of those who do intend to take part in activities, at least two thirds say they will delay their return<sup>12</sup>.**

People who took part in swimming and indoor gym/fitness classes are indicating the highest intention to return.

A similar picture is emerging for volunteers, with around seven in ten adults who volunteered before the pandemic saying that they intend to do so again. However, two out of three who intend to resume say they are not planning on doing so immediately as restrictions ease<sup>13</sup>.

Some people have expressed that they feel hesitant and struggle to imagine using sports or exercise facilities straight away, even with a vaccine, and as such will continue to avoid crowded or enclosed spaces for a while.

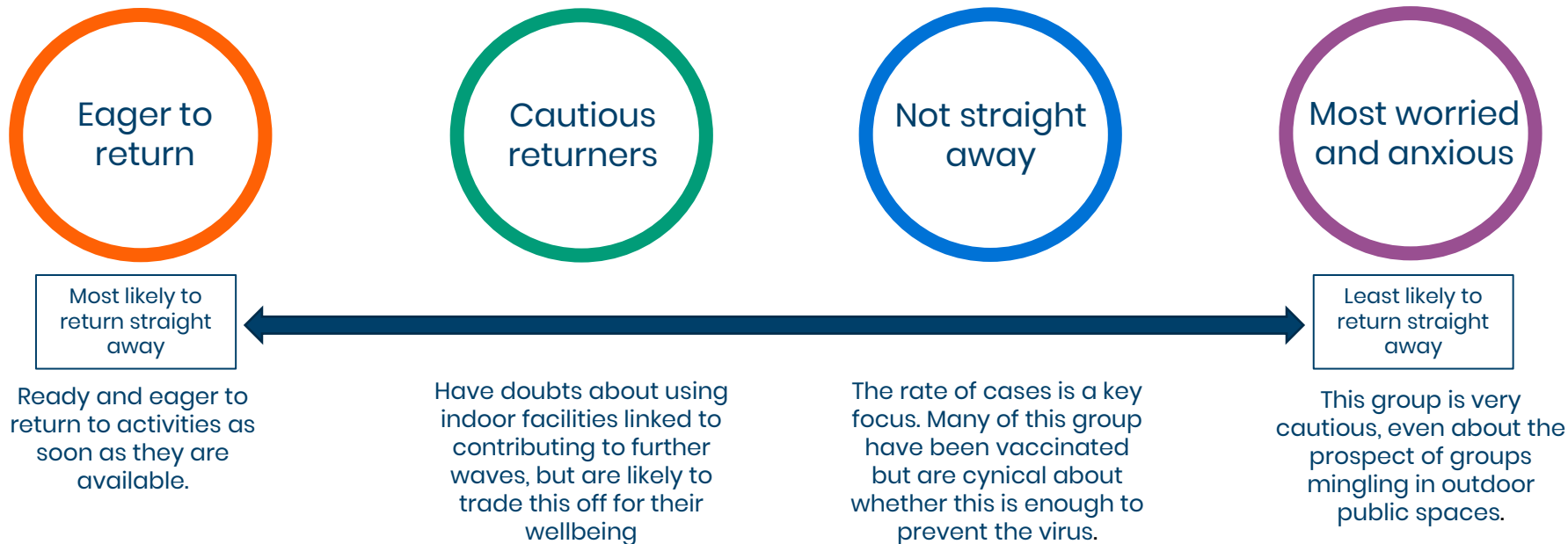
Numerous people expressed the fact that, by generally having more freedom, they will naturally weave more movement into their everyday lives – for instance, travelling to work or school, visiting new places and going to the shops in their local area.

People aged 55 and over have tended to give examples of where they will try to build more activity into their daily routines, such as climbing the stairs, doing housework and gardening.



## How might people behave as sport and physical activity reopens

As restrictions ease initially it's expected that people will generally feel more comfortable being outdoors than indoors. Our data indicates that, of those who use indoor leisure facilities, there will be differences between how soon people will return. Broadly it is expected that people will fall into the following camps:





## Intend to return first

There's likely to be a great degree of variation in likelihood to return indoor facilities but there is a group waiting in the wings to use facilities as they open, especially gyms and classes.

### Eager to return

Sport and physical activity being extremely important for physical and mental health will be a key driver for those people who return to activities as soon as they are permitted.

It's expected that this group will largely comprise of men and women who are aged between 16 and 34 years, in higher socioeconomic groups.

This group trust activity providers and had good experiences when facilities reopened in 2020. They have a lower perception of risk compared to other groups and whilst the vaccine rollout provides some additional reassurance it is not a major factor in their willingness to return.

Lack of available booking slots and flexibility of sessions could present as barriers to this group being active.

### What will help them to return?

Easy to use booking systems and maintenance of Covid-secure measures.

“ I consider this safe and feel the right precautions are placed and carried out through hand gel, tissues to clean equipment and sprays to ensure cleanliness around the gym.

I am not refraining from physical activity and feel it is beneficial in terms of health overall especially with the current climate. ”

- Male, 18 - 34



## Intend to return

### Cautious returners

Most likely to include parents and men and women aged 18-34 in higher socioeconomic groups, this group have their doubts about using indoor facilities but can probably be convinced to return if they feel the level of risk is low.

Mentally, for this group the decision to return is based less upon their individual safety and more around a moral dilemma. Hesitancy stems from feeling unsure whether their attendance will contribute towards another spike in Covid-19 cases.

They will consider the trade-offs with the benefits to their wellbeing likely to trump the perceived risk.

Based upon past experiences they tend to trust facilities to maintain good hygiene and Covid-secure procedures.

### What will help them to return?

Evidence of low virus transmission rates in facilities and active promotion of steps being taken to minimise risk.

“ At this moment, I am rather pessimistic. I do think with the vaccine rollout I would feel a little better, but I would have to make a decision once I judge the transmission numbers. ”

- Female, 18 – 34, parent



## May return but not straight away

### Not straight away

The rate of cases is a key focus for this group, many of whom have been vaccinated.

This group are missing their pre-pandemic activities and routines and many are aware that they are less active than usual owing to a loss of opportunities to be active as a result of restrictions.

Whilst the vaccine rollout provides some reassurance, they want to see lower rates of cases for a sustained period of time before they return.

In addition to this, there is some scepticism about exercising indoors from this group centred around ventilated spaces.

On account of the barriers in existence, this group may take longer, contemplating their return before taking action. As such, multiple touchpoints and messages are likely to be required to build reassurance before they return.

### What will help them to return?

Outdoor offers from providers, low case rates of Covid-19 and reassurance through ongoing promotion of Covid-secure procedures.

“ I am refraining from doing this due to concerns about contracting the virus. I am not sure this is safe at the moment especially when I think about how quickly the virus spread late last year once we were allowed to mix freely. ”

- Female, 18 – 34





## Not returning any time soon

### Most worried and anxious

Men and women aged 55+ and people with long-term health conditions are most likely to be among the groups of people who do not intend to return in the near future.

People in this group have been amongst the most worried and anxious throughout the pandemic. They're against the prospect of mingling indoors or in crowded spaces outdoors owing to a moral responsibility they feel for others.

As they have been following the rules closely, this group are really missing socialising with others.

Feeling in control of their personal space will be important as restrictions ease, as they are more likely to be scared of crowded or closed indoor spaces.



Delay in the return of some people to indoor settings such as gyms and leisure centres may create a sense of "in-group out-groupness". People could feel left behind and even less like they belong.

### What will help them to return?

- Ability to participate in outdoor activities with lots of social distancing.
- Reassurances around the vaccine and how it contributes to lower risk.
- Timely communication to keep them connected and sustained digital offers.

“Thinking about gathering indoors I am scared, due to the enclosed areas, close contact and not wearing face coverings. Outdoors is a lot better with fresh air and wide spaces”

- Female, 55+



## What will help people to return?

For those who intend to take part in activities, most would welcome a combination of Covid-secure measures and knowing that they and others have been vaccinated.

1

Showcase your Covid-19 safety measures

2

Emphasise enjoyment and help people ease back in gradually

3

Mental and physical health matters – but show the benefits, small victories and avoid telling

4

Provide flexible membership offers

5

Make booking sessions easy & as hassle free as possible



## Reopening Summary

### Step 1a – 8 March

Face to face learning for children and young people.

Wrap around childcare and supervised activities are permitted.

### Step 1b – 29 March

Outdoor gatherings for 6 x people or 2 x households.

Outdoor sports facilities open and formally organised sport permitted outdoors

### Step 2 – 12 April

Indoor leisure facilities open for use with people within their own household.

Non-essential retail, personal care, libraries etc open.

Most outdoor attractions e.g. zoos open.

Hospitality venues can serve outdoors.

Self-contained accommodation reopens.

### Step 3 – date TBC

Most restrictions on meeting others outdoors will be lifted, however gatherings of 30+ will remain illegal.

Indoors, the rule of six or two households will apply (the government will keep under review if it's safe to increase this).

Indoor hospitality will re-open.

Larger sporting events allowed indoors and outdoors – with caps on spectator numbers.

### Step 4 – date TBC

Most legal limits are lifted



## Tools and resources

Return to Play

Latest Government Guidance

Covid-19 physical activity tracker and dashboard

Active Lives Adult May 19/20



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## Sources

[1] [6] [7] [8] Physical Attitudes and Behaviours Survey, Savanta ComRes, Waves 14, 15 and 16. Wave 14 carried out over 27.11.2020 – 30.11.2020, wave 15 carried out over 15.01.2021 – 18.01.2021 and wave 16 carried out over 26.02.2021 – 01.03.2021. c. 2000 16+ adults.

[2] YouGov. Snap Poll: English people tend to back pace of lockdown lifting. Fieldwork 22.02.2021. Published 22.02.2021.

[3] YouGov. What are people looking forward to most as lockdown in England relaxes? Fieldwork 07.04.2021 – 08.04.2021. Published 12.04.2021. 1,705 GB adults.

[4] [5] [10] [11] [12] [13] Join the Movement Campaign Evaluation: Lot 1 Wave 2 & Lot 2 Wave 3. Online Survey: 2,503 adults (16+) interviewed between 26.02.2021 – 05.03.2021. Community carried out over 08.03.2021 – 12.03.2021. 63 participants.

[9] Coronavirus: Impact on the labour market. Briefing paper number 8898, 25.03.2021. House of Commons Library. 25.03.2021.

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[Summary](#)

[Insight](#)

[Intention](#)

[Resources](#)

