The return on investment of sport and physical activity in England in 2024

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This report has been prepared by researchers from the Sport Industry Research Centre (SIRC) at Sheffield Hallam University and the Institute of Sport at Manchester Metropolitan University. The report has been commissioned by Sport England.

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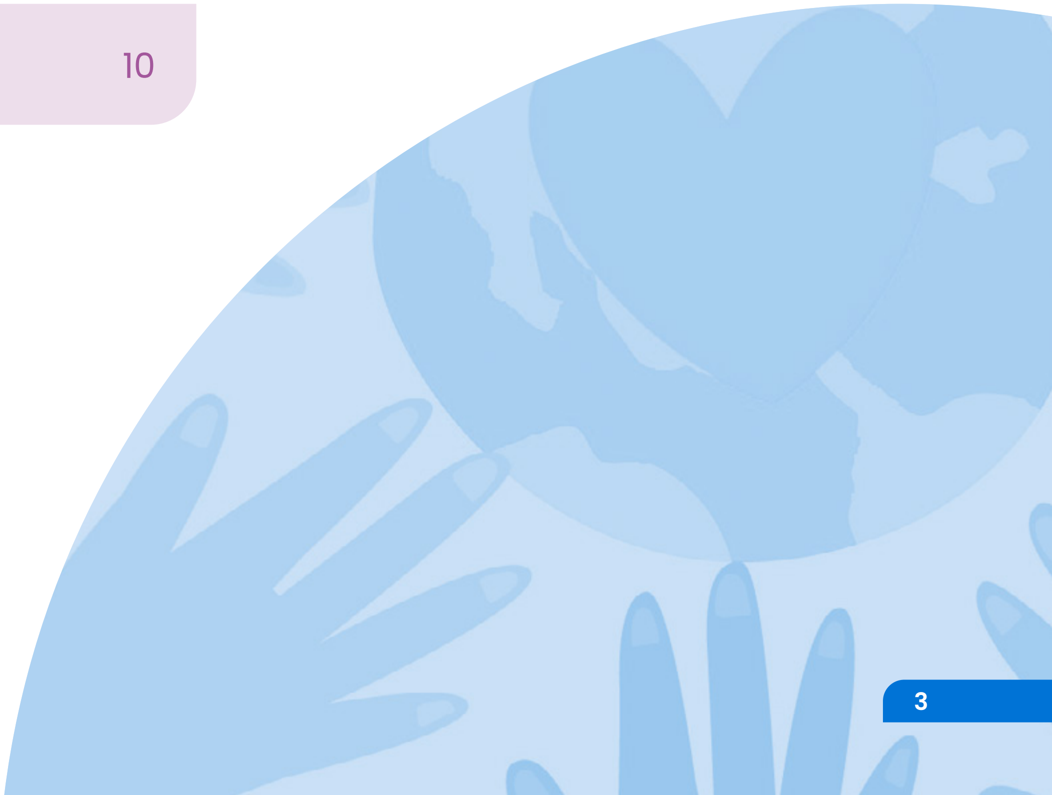

Introduction

In 2023, Sport England commissioned a consortium of research partners to develop an updated model of the social value of community sport and physical activity for England for 2023 (Year 1) and 2024 (Year 2)[1].

Both Year 1 and Year 2 of this work measured the primary (wellbeing) and secondary (health) value of sport and physical activity, delivered in partnership by State of Life, Sheffield Hallam University and Manchester Metropolitan University[2]. The Year 1 work also involved producing an estimate of the return on investment (ROI) by taking into account the 'inputs' required to support engagement with community sport and physical activity in England. The purpose of this report is to present the corresponding estimate of the inputs and ROI for Year 2.

We consider two types of ROI ratios. First, a ratio relating to social value only. Second, a ratio relating to the combined economic and social value of sport and physical activity, which incorporates the findings on the economic contribution of sport from the Department for Culture, Media and Sport Satellite Account[3]. Environmental outcomes were not assessed and are therefore not included in the ROI calculation.

1 This work builds on two previous social return on investment (SROI) studies conducted by Sheffield Hallam University for Sport England, which used participation and volunteering data from 2013/14 and 2017/18.
2 Social value of sport and physical activity | Sport England
3 Sport Satellite Account for the UK 2024: Key findings - GOV.UK

Inputs

Inputs are those things that stakeholders contribute to support engagement with sport and physical activity in England, including money (financial) and time (non-financial).

The material financial and non-financial inputs provided by relevant stakeholders in 2024 are presented in Table 1.

Table 1 Value of inputs in 2024

Inputs				£ million
Financial	Consumers			28,000.1
	Public sector			2,015.9
		Of which:	Sport England	349.6
			Local authorities	1,472.7
			DCMS	13.6
			Department for Transport	112.0
			DHSC/OHID	68.0
	Other			1,435.5
		Of which:	Educational institutions	1,429.5
			Charities	6.0
Non-financial			Volunteer time	6,341.0
OVERALL				**37,792.5**

Collectively, the value of the financial (£31.5bn) and non-financial (£6.3bn) inputs in 2024 is estimated to be circa **£38bn** (up from £35bn in 2023). The data sources and key assumptions used to derive these inputs are outlined below.

- **Consumer spending on sport and physical activity** was estimated for England using the DCMS Sport Satellite Account, but we only consider the spending on active engagement (e.g. sports goods and equipment, members' fees, clothing and footwear used for participation etc.) and the figures were adjusted for inflation using standard GDP deflators as well as changes in adult and child participation rates between Year 1 and Year 2. It is estimated that around 66% of sport-related consumer spending in England refers to community participation, which corresponds to £28bn at 2024 prices. We have explicitly excluded any consumer spending associated with sport-related media and gambling and other forms of expenditure on passive engagement.
- **The activities of public sector agencies, local authorities and government departments** are also recognised in the inputs (totalling £2bn), which were collated by Sport England from a range of sources including their annual reports, Local Government Association, DCMS, DHSC/OHID and the Department for Transport.
- **The sport and physical activity spending on public and private education** (£1.4bn) was estimated using the DCMS Sport Satellite Account alongside additional information provided by Sport England on the expenditure by schools and further education and higher education institutions.
- **Data on the contribution of charitable organisations is limited** and is unlikely to make a material difference to the overall figure for inputs. However, we have included the inputs for one of the UK's leading charities for improving the education and development of children through sport (Youth Sport Trust). To avoid double counting, this figure excludes any inputs already allocated to Sport England.
- **A material non-financial stakeholder input relates to the replacement cost of volunteer time**, which is valued at £6.3bn based on the number of adult volunteers that support sport and physical activity, the average number of hours that they contribute annually, and the average hourly wage. This calculation is detailed in Appendix A. Volunteering by children and young people is not included within this estimate.

As with the primary and secondary values, we have included material inputs that can be evidenced robustly. Reasonable care was taken to ensure that inputs were not double counted, for example between DCMS and Sport England. Similarly, the inputs associated with the private sector are captured as part of the consumer spending estimate and are therefore not recognised separately to avoid double counting. Some stakeholder inputs are excluded due to lack of robust data (e.g. third-sector contributions and private sponsorship), but such inputs are unlikely to be material relative to the size of the inputs that have been captured.

Return on investment

Social ROI

The value associated with the replacement cost of the time contributed by volunteers to support sport and physical activity was treated as both an input and outcome in the Year 1 ROI calculation on the basis that volunteer time represents a non-monetary benefit to organisations who rely on their labour. If we adopt a similar (inclusive) approach, then the total social value in 2024 amounts to **£129bn** and the ROI ratio is **3.42**[4] – see Table 2. While this ROI ratio is higher relative to 2023 (3.21), it is not directly comparable because additional primary and secondary values were incorporated in the Year 2 work (e.g. the wellbeing associated with participation by primary school aged children, and health-related productivity savings among physically active adults).

Table 2 Return on investment in 2024 – Social outcomes

		£ billion
Outcomes	Primary value (wellbeing)	106.9
	Secondary value (health)	15.9
	Volunteering replacement value	6.3
	Social value	**129.2**
Inputs	Financial	31.5
	Non-financial	6.3
	Total inputs	**37.8**
Return on investment (outcomes/inputs)		**3.42**

4 If we exclude the replacement value of volunteering as an outcome, then the ROI ratio is 3.25. For illustrative purposes, if volunteering was to be removed from both sides of the equation (i.e. inputs and outcomes), then the ROI increases to 3.91.

Economic and social ROI

The combined economic and social value of sport and physical activity in England in 2024 is estimated at circa **£165bn**, as shown in Table 3 (up from £148bn in 2023). This aggregate figure consists of £129bn in social value (as per Table 2 above) plus £36bn in community sport related economic activity (gross value added – GVA). The £36bn GVA figure has been estimated using the DCMS Sport Satellite Account and adjusted for inflation. Consistent with the Year 1 work, the GVA estimate is based on the assumption that 66% of GVA associated with sport and physical activity in England relates to community participation[5].

The ROI ratio for economic and social outcomes in 2024 works out at **4.38**[6].

Table 3 Return on investment in 2024 – Economic and social outcomes

		£ billion
Outcomes	Social value (From Table 2)	129.2
	Economic value – GVA	36.2
	Combined economic & social value	**165.4**
Total inputs (From Table 2)		**37.8**
Return on investment		**4.38**

5 The 66% figure used is a proxy based on the share of sport-related consumer spending in England that is associated with being active. In 2017/18, the shares of sport-related consumer spending and GVA in England associated with community participation were 54% and 58% respectively. Hence, the assumption that the share of sport-related GVA that is associated with community participation is at least commensurate with the corresponding share of sport-related consumer spending seems reasonable and conservative.

6 If we exclude the replacement value of volunteering as an outcome, then the combined ROI for economic and social outcomes is 4.21. For illustrative purposes, removing volunteering from both sides of the equation (inputs and outcomes) increases the combined ROI to 5.06.

As illustrated by the data presented in Table 4, the 2024 ratio compares favourably relative to the corresponding ratios for previous years, albeit varying outcomes, population groups, valuation techniques, data sources and assumptions have been utilised in the different iterations of this work, which limits a genuine comparison to be made over time.

Table 4 Return on investment in context

	2013	2018	2023	2024
Social – Health (£bn)	5.2	9.6	10.5	15.9
Social – Wellbeing (£bn)	30.4	41.8	96.7	106.9
Social – Volunteer replacement (£bn)	Excluded	5.7	5.6	6.3
Social – Other (£bn)	9.2	14.5	Excluded	Excluded
Economic – GVA (£bn)	Excluded	13.8	34.9	36.2
Total value of outcomes (£bn)	44.8	85.5	147.6	165.4
Return on investment	**1.91**	**3.91**	**4.20**	**4.38**

Appendix – replacement value of volunteering

Introduction

The time contribution of volunteers to support sport and physical activity represents a non-market benefit for organisations that rely on the services of volunteers. The replacement cost of volunteering is a minimum representation of the value to organisations in the sport and physical activity sector. This approach is consistent with the Year 1 work.

Data and assumptions

As per the 2024 Active Lives data tables, around 22.3% of the adult population (aged 16+) in England volunteered to support sport and physical activity in the last year, equivalent to some **10.5m** adults. Active Lives data on volunteering frequency is captured using the four categories shown in Table A1. However, it is important to recognise that the sum total of adults in these categories is lower than the total number of adults using the headline statistic available for 'any volunteering' (i.e. 10m v 10.5m). The replacement cost/value calculation utilises the latter (higher) figure.

Table A1 also shows our numerical assumptions corresponding to each frequency of volunteering, which are on the conservative side. The number of volunteering occasions are estimated by multiplying the number of volunteers in each category by the relevant assumption about how many times they volunteered during the last year. Using this approach, the average frequency of volunteering across all categories is estimated at around 21 times.

Table A1 Volunteering frequency 2024

Self-reported frequency	Adults	Number of times (assumed)	Volunteering occasions
Once/one-off	2,182,600	1	2,182,600
Every few months	2,687,900	6	16,127,400
Once a month but not once a week throughout the year	1,902,000	12	22,824,000
Once a week or more throughout the year	3,211,400	52	166,992,800
Total	**9,983,900**	**21**	**208,126,800**

Data on volunteering duration is not reported in the Active Lives data tables but can be extracted from the Active Lives interactive tool. Like the frequency data, the data on duration is captured in categorial form and can be converted into a numerical figure using a set of assumptions – see Table A2. Based on these (conservative) assumptions, the weighted average duration per volunteer is estimated at around 102 minutes or 1.7 hours. According to the Annual Survey of Hours and Earnings (ASHE)[7], the median hourly pay for all employee jobs in the UK in 2024 was £17.09.

Table A2 Volunteering duration

Duration in any given instance	%	Number of minutes (assumed)
Less than half an hour	8.7%	15
Around half an hour	11.6%	30
Around 45 minutes to an hour	28.8%	52.5
Around two hours	30.5%	120
Three or four hours	11.8%	210
More than four hours	8.6%	240
Total	**100.0%**	**102**

7 Earnings and hours worked, all employees: ASHE Table 1 - Office for National Statistics

Derivation of replacement cost/value

Bringing together the data and assumptions presented in the previous section:

- 10.5m adults in England volunteered to support sport and physical activity in 2024.
- The average frequency per volunteer was around 21 times, with an average duration per occasion of 1.7 hours i.e. each volunteer committed approximately 35.4 hours.
- The typical hourly wage rate was £17.09.

Using this data, the replacement cost/value of sport-related volunteering is estimated at £6.34bn in 2024 prices (i.e. 10.5m volunteers x 35.4 hours x £17.09). For comparative purposes, the corresponding estimate for Year 1 was £5.58bn in 2023 prices.

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