

RETURN TO MAJOR SPORTS EVENTS 2021 REPORT



CONTEXT OF THE STUDY

On March 31 2021 UK Sport completed a study to capture public sentiment on the return of major sports events during the coronavirus pandemic. The results of this study are outlined in this report. This study concluded the second phase of the Return to Major Events research, with the first being carried out in summer 2020.

The decision to reopen events to spectators in the UK sits with each of the devolved governments as part of the roadmap for easing lockdown restrictions. It is contingent on the continued success of the national vaccination programme, low numbers of hospitalisations related to coronavirus infections and new Covid variants remaining under control and not creating further risk.

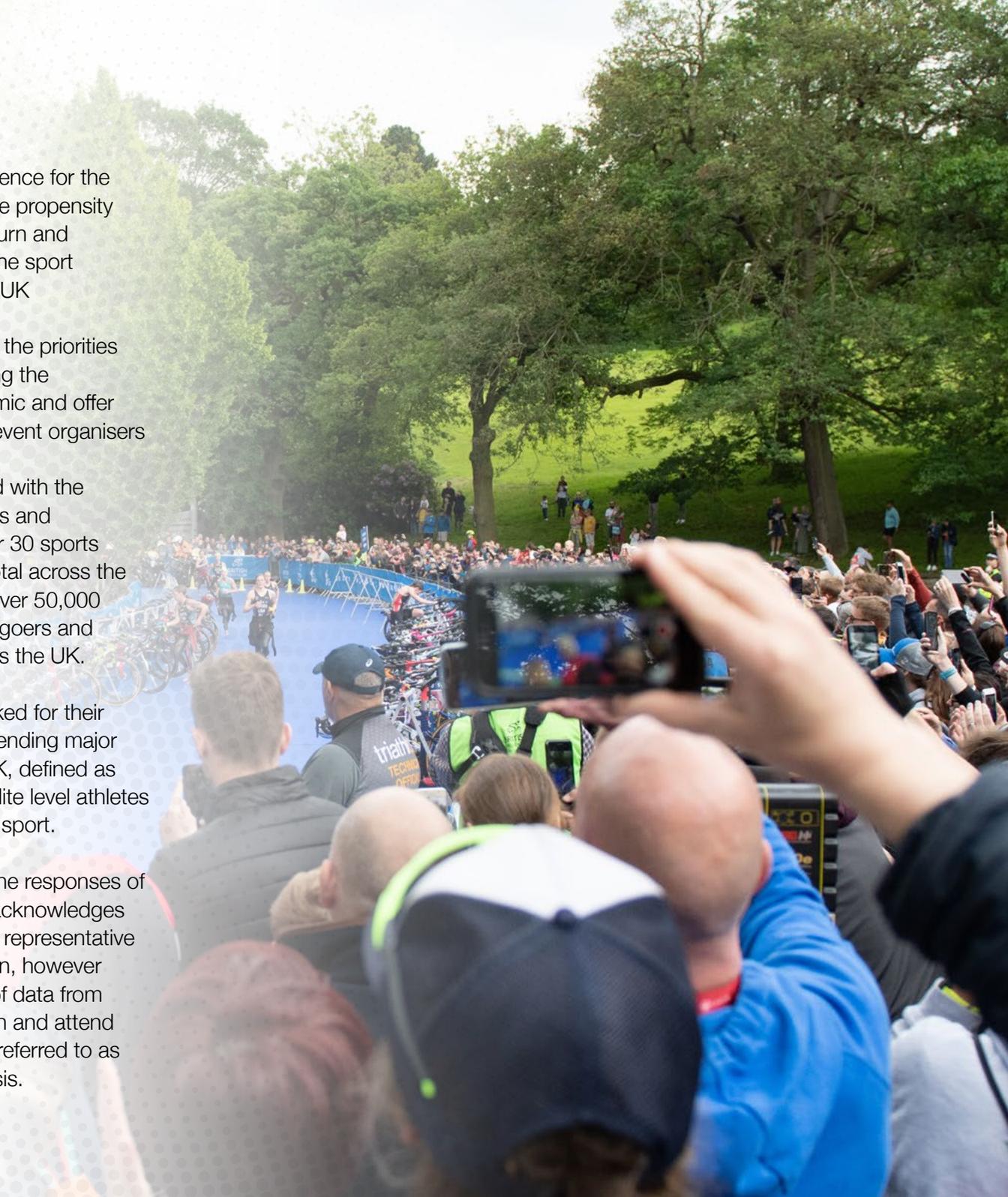
However, should these particular conditions continue to be positive and the roadmap proceeds as set out, the results of both surveys serve to:

- Provide robust evidence for the events sector on the propensity of spectators to return and the importance of the sport event sector to the UK
- Provide analysis on the priorities for spectators during the coronavirus pandemic and offer considerations for event organisers

The survey was shared with the membership databases and social networks of over 30 sports organisations and in total across the two phases received over 50,000 responses from event-goers and sports fans from across the UK.

Respondents were asked for their thoughts regarding attending major sports events in the UK, defined as events which feature elite level athletes at the pinnacle of their sport.

The report speaks to the responses of these individuals and acknowledges that the results are not representative of the British population, however offers a large sample of data from those who engage with and attend major sports events – referred to as ‘fans’ within this analysis.



EXECUTIVE SUMMARY

Spectating at major events is about more than just watching sport; it brings people together, united under a shared purpose and part of something bigger than the individual. While the magic of being part of a crowd has not been possible for the last few months, the results from this survey are positive for the future of the sports events sector as they clearly show that fans are committed to return to events as the country cautiously begins to open up.

Survey highlights:

97% of respondents feel comfortable returning to major sports events in the future.

75% of these would be comfortable returning within the next four months, with the belief it will be safe to do so at this point being the principal reason for this.

Over 70% of respondents think they will feel excited when they are able to attend a major sports event again. Only 22% state they might feel anxious when attending.

A clear refund policy is the main driver for spectators feeling confident to purchase a ticket.

This is closely followed by being able to avoid long queues and the availability of hand sanitiser.

58% of respondents hold the event organiser primarily responsible for maintaining a Covid-safe environment at a major event,

highlighting the significant responsibility event organisers have when delivering events in the current environment.

97% of respondents agree that major sports events are good for the nation's spirits.

Fans miss the buzz of live sporting action, supporting their favourite athlete or team, and being at events with family/friends.

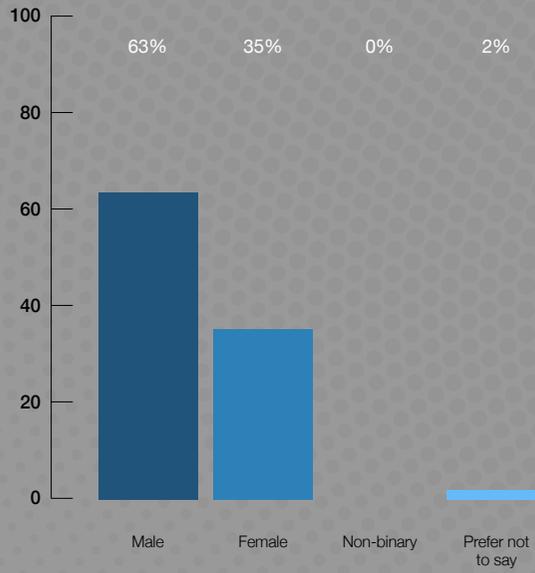
Over 84% of respondents agree that government should continue to provide financial support to the major sports events industry.

Without this, only 27% agree that major sports events can survive/continue post Covid-19. UK Sport is working closely with DCMS to continue to explore all options on how to support the sector and bring spectators back into sporting venues.

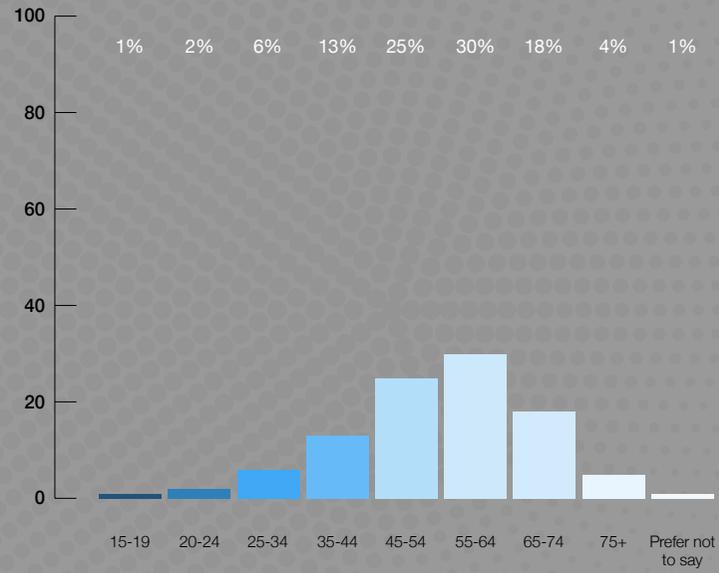


WHO DID WE SPEAK TO?

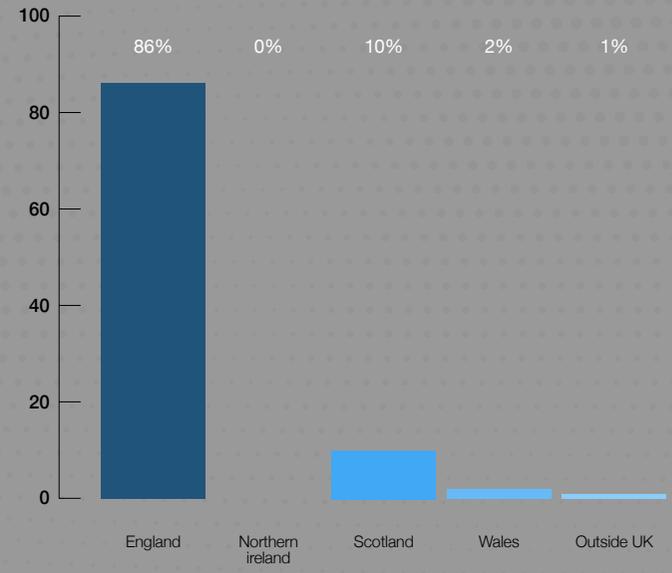
GENDER



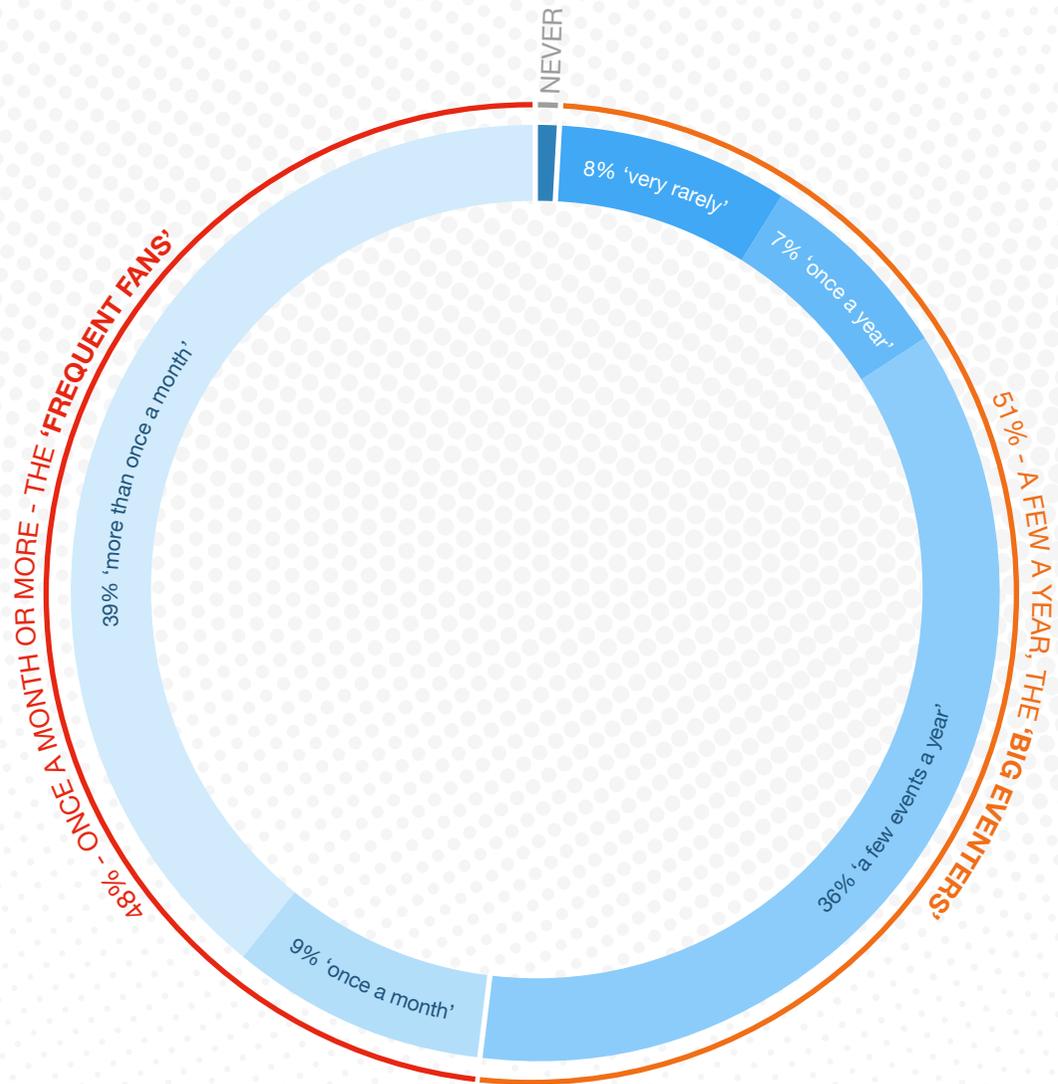
AGE



LOCATION



PREVIOUS ATTENDANCE AT MAJOR SPORTS EVENTS



0%	I have no interest in sports events and would never attend one	Never
1%	I follow sports events via the media but haven't attended as a spectator	
8%	I follow sports events via the media but only attend very rarely	51% - A few a year - the 'Big Eventers'
7%	I follow sports events via the media and I attended an event once a year	
36%	I follow sports events via the media and I attended a few events a year	
9%	I follow sports events via the media and I attended events once a month	48% - Once a month or more - the 'Frequent Fans'
39%	I follow sports events via the media and I attended events more than once a month	

RESPONDENTS HAVE ATTENDED EVENTS

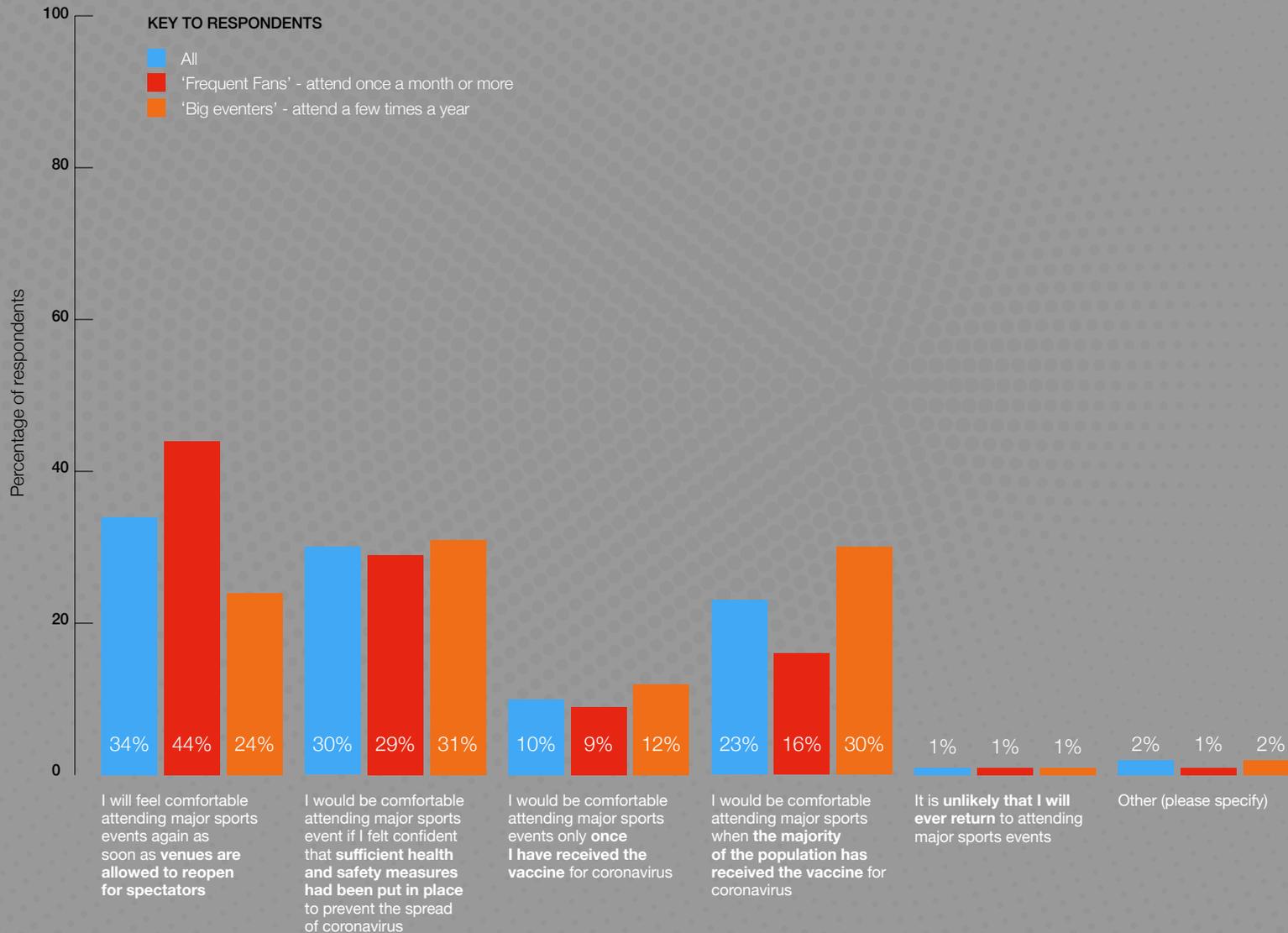
IN 105 DIFFERENT SPORTS

- | | | |
|--------------------|---------------------------|----------------------|
| Football | Table Tennis | Blind Football |
| Rugby Union | Ice Skating | Lacrosse |
| Cricket | Volleyball | Snowboard |
| Rugby League | Squash | Skateboarding |
| Horse racing | Handball | Futsal |
| Athletics | Wheelchair Basketball | Sitting Volleyball |
| Cycling | Polo | Ski Jumping |
| Tennis | Wheelchair Rugby | Para Table Tennis |
| Golf | Para-cycling | Goalball |
| Swimming | Weightlifting | Para Rowing |
| Boxing | Wheelchair Tennis | Biathlon |
| Motorsport - cars | Baseball/Softball | Para Triathlon |
| Formula 1 Racing | Water Polo | Water skiing |
| Greyhound Racing | Archery | Speed Skating |
| Equestrian | Shooting | Para Archery |
| Hockey | Mixed Martial Arts | Cross-country Skiing |
| Ice Hockey | Skiing | Esports |
| Darts | Judo | Para Canoe |
| Gymnastics | Surfing | Bobsleigh |
| Basketball | UFC | Korfball |
| Motorsport - bikes | Gaelic Football & Hurling | Croquet |
| Rowing | Wheelchair Rugby League | Wheelchair Fencing |
| Para Athletics | Fencing | Roller Hockey |
| Triathlon | Para Equestrian | Shooting Para Sport |
| Dance | Climbing | Para Judo |
| Netball | Modern Pentathlon | Ultimate Frisbee |
| Badminton | Curling | Para Badminton |
| Cheerleading | Taekwondo | Skeleton |
| Bowls | Karate | Para Sailing |
| Sailing | Boccia | Wheelchair Curling |
| Highland Games | Alpine Skiing | Luge |
| Diving | Australian Rules Football | Para Ice Hockey |
| Para Swimming | Kickboxing | Para Taekwondo |
| Wrestling | Windsurfing | Para Snowboard |
| Canoeing | Powerlifting | |

PROPENSITY TO RETURN



HOW ARE YOU CURRENTLY FEELING ABOUT THE POSSIBILITY OF ATTENDING MAJOR SPORTS EVENTS ONCE GOVERNMENT GUIDANCE ALLOWS?

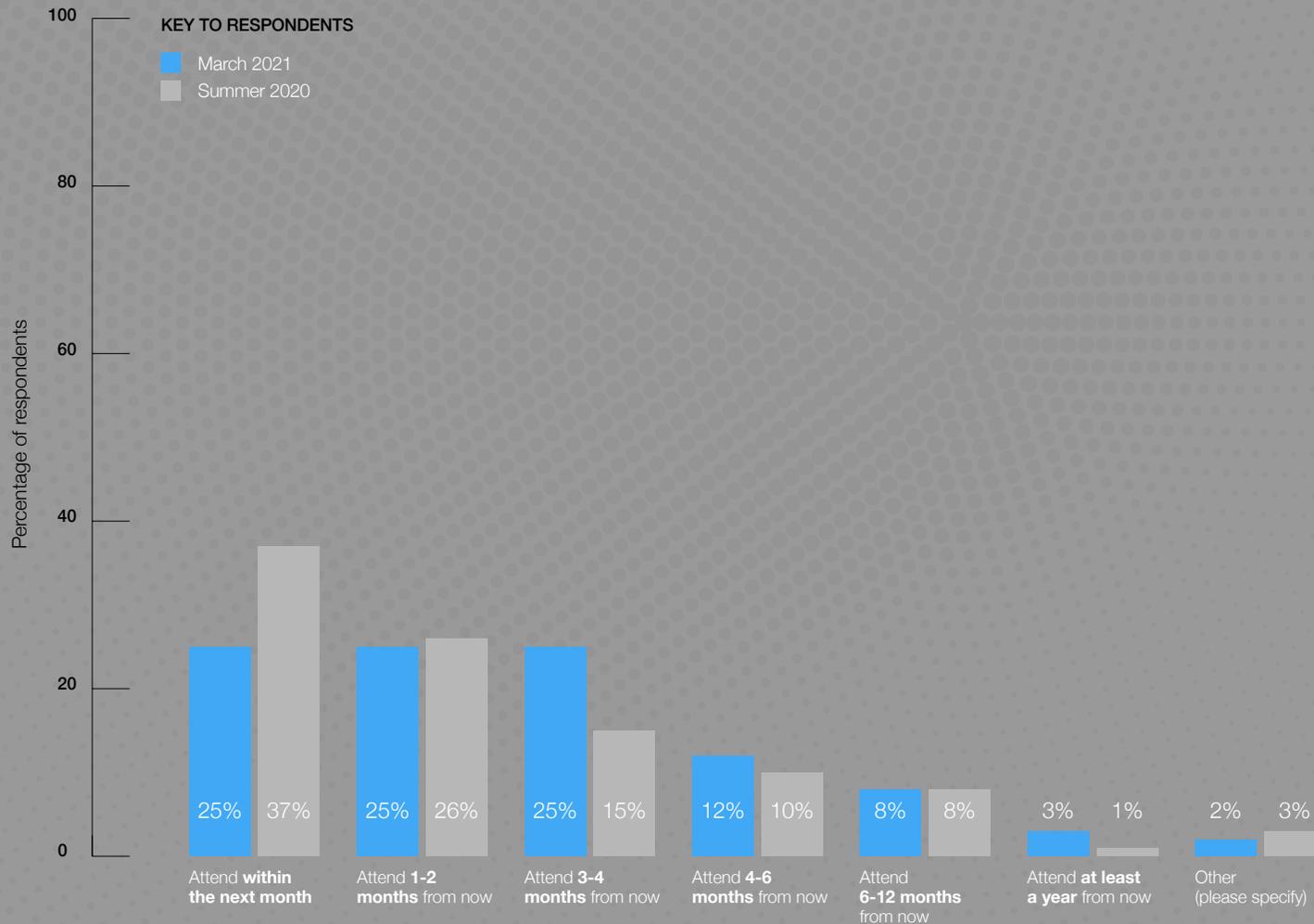


As of the end of March 2021, 97% of respondents can see a situation where they feel comfortable returning to major sports events.

Over 30% feel ready to return as soon as venues are allowed to reopen, an additional 30% will return with sufficient preventative health and safety measures. Another 30% cite the vaccine as integral to their intention to return to events. Only 1% of respondents are unlikely to attend major sports events due to the impact of coronavirus.

Where fans are used to attending events regularly, they are more comfortable with returning as soon as venues are allowed to reopen (44%), with vaccinations being of less importance. For those who attend events less frequently, health and safety measures and vaccinations for the majority of the population are of equal importance (31% and 30% respectively).

WHAT IS THE EARLIEST DATE YOU WOULD CONSIDER ATTENDING A SPORTS EVENT?

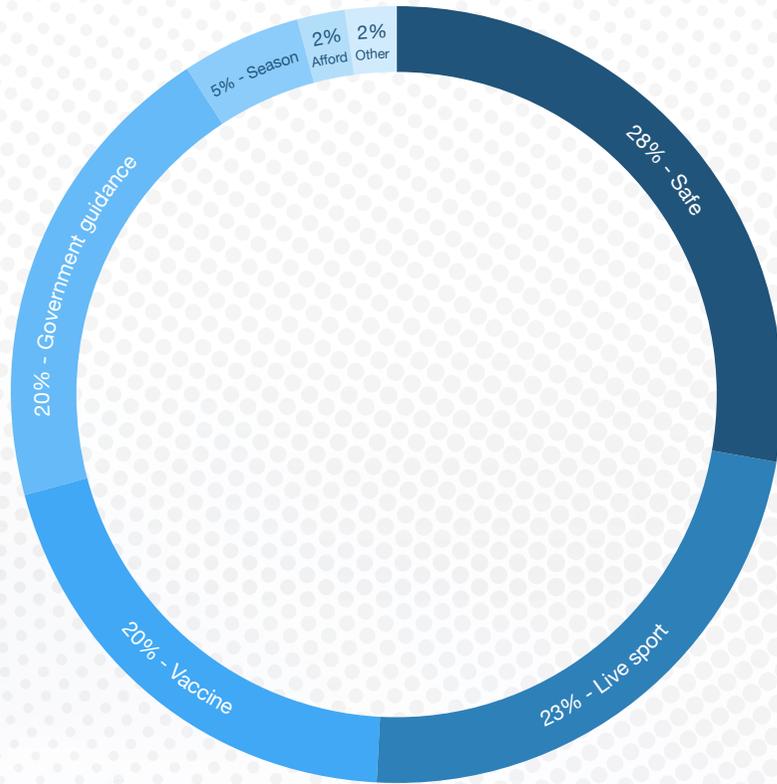


As of the end of March 2021, 75% of fans would be prepared to return to an event within four months.

Both this edition and the summer results show that sports fans are strongly inclined to return to events, with over three quarters of fans in both cases being happy to return within four months of being asked.

In 2021, overall motivation to get back to events is still as strong as in summer last year, with the majority being ready to return in line with the government's roadmap to reopening the nation. In comparison to last summer's results, whilst willingness to return immediately is lower, this is likely reflecting that there is a clearer picture and, therefore, measured expectations of when a return to 'normal' might be possible.

WHY WILL YOU CONSIDER ATTENDING A SPORTS EVENT AT THAT POINT?



I believe it will be safe to do so by then	28%
I want to get back to watching live sport	23%
I will have received the vaccine by then	20%
I believe government guidance will allow spectators at events by then	20%
It is the start of my sport's season	5%
I will be able to afford to then	2%
Other (please specify)	2%

Almost a third of respondents are basing their decision on when they will return on when they believe it will be safe to do so, with the desire to watch live sport, government guidance allowing attendance and prevalence of the vaccine also being important factors in their decision making process.



ANALYSIS

With event organisers preparing to invite spectators back to venues, it will be welcome news that, with appropriate health and safety measures in place and the continued progress of the vaccination roll-out over two-thirds of sports fans are comfortable returning to events in line with the UK government's roadmap for easing lockdown.

Furthermore, sports, especially those with regular attendees, can feel encouraged that another third of fans are comfortable and keen to return as soon as venues are allowed to reopen.

Fans appear more decisive and pragmatic in this edition of the research. In the midst of reopening from the first lockdown last summer, positivity was high in terms of feeling ready to return to events quickly, but there was also more longer-term

indecision as to what the future held. Furthermore at that time, concern about regional infection rates, the potential of a second wave, and limited prospect of a vaccine being readily available meant event organisers had to be prudent when considering staging events in the forthcoming 6-9-month window.

However, the cautious approach to reopening the nation following the current national lockdown has meant fans have been able to be more realistic in their responses. There is strong confidence that sufficient safety measures will be in place, and the impact of the vaccine offers a sense of security which was not available in the summer.

Whilst regional infection rates remain a concern, those who are still reluctant to attend now cite the inability to

predict how the virus will develop globally and the potential for newer strains of the virus as more of a worry. As fans have had to turn to the digital world to engage sport, some who would have previously attended events now feel more able to access their sport, and prefer to watch, from the safety of their homes.

However, event organisers should feel confident that they can expect continued attendance from spectators. Despite a challenging winter for the nation, with coronavirus creating a bleak outlook for many months and the route out of lockdown being very cautious, **sports fans are resilient** and their desire for live action shines strongly alongside the need for safety measures and vaccines. In both studies, **within four months, three quarters of fans were comfortable returning to spectate at major**

sports events, and results show that by September, almost 90% will be back.

For those hosting one-off or annual major events, these results give hope that the timeframes for reopening will allow for good fan engagement and attendance, and offer suggestions for how they should approach mitigation of 'Big Eventer' spectator concerns (see the Specific Measures section for further detail). For those hosting regular events, the more frequently a fan attends, the more confidence they appear to have in the organisers. This confidence, possibly born out of familiarity, coupled with a desire to get back to supporting their sport, and the lifestyle of a regular match goer, is a strong driver for Frequent Fans to engage.

SPECIFIC MEASURES



FORUM
MANCHESTER



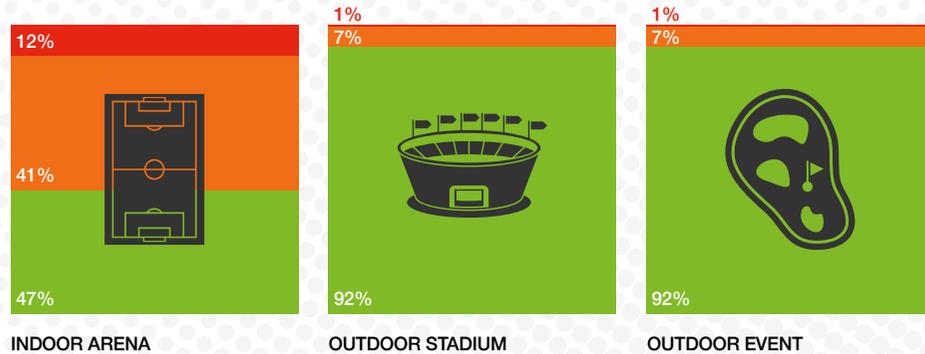
FORUM
MANCHESTER



PARAPOWERLIFTING

WOULD YOU CONSIDER ATTENDING A SPORTS EVENT AT THE FOLLOWING VENUES?

■ Yes
 ■ Maybe
 ■ No



INDOOR ARENA

OUTDOOR STADIUM

OUTDOOR EVENT

WHICH OF THE FOLLOWING MEASURES ARE IMPORTANT IN GIVING YOU CONFIDENCE TO PURCHASE A TICKET AND ATTEND A MAJOR SPORTS EVENT?

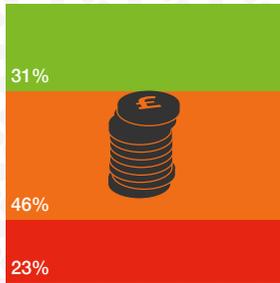
- 1 ★★★★★ Clear refund policy in the event of event cancellation
- 2 ★★★★★ Avoiding long queues of people
- 3 ★★★★★ Availability of hand sanitiser/hand washing facilities
- 4 ★★★★★ Seats spaced in line with social distancing guidance
- 5 ★★★★★ Low regional infection rates ('R' number)
- 6 ★★★★★ Enhanced social distancing measures in public spaces surrounding the venue
- 7 ★★★★★ Limits on the number who can attend
- 8 ★★★★★ On-site health monitoring (eg taking temperature)
- 9 ★★★★★ Knowing venue-cleaning procedures
- 10 ★★★★★ Face masks being worn by all attendees
- 11 ★★★★★ Demonstrating a sustainable approach to the staging of the event
- 12 ★★★★★ 'Vaccinated only' zones
- 13 ★★★★★ Clear direction on how to travel to the event without using public transport
- 14 ★★★ Seeing others have attended sports events safely before I attend
- 15 ★★★ Alcohol sales prohibited at venue
- 16 ★★ Secure bike parking

*RATING OUT OF FIVE STARS, ROUNDED TO NEAREST .5 STAR

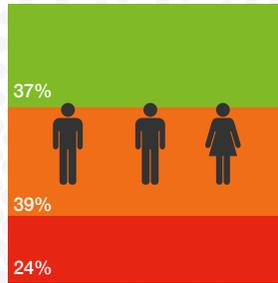


WOULD ANY OF THE FOLLOWING STOP YOU FROM PURCHASING A TICKET AND/OR ATTENDING A MAJOR EVENT?

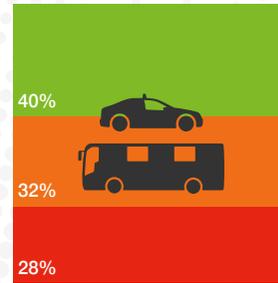
■ Yes
 ■ Maybe
 ■ No



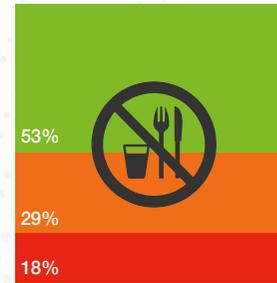
INCREASED TICKET PRICES TO COVER ENHANCED HYGIENE AND SAFETY MEASURES



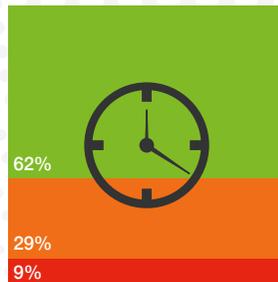
LONGER QUEUE TIMES FOR ENTRANCE/EXIT/TOILETS



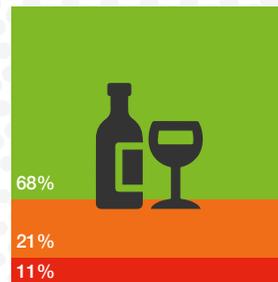
HAVING TO TAKE PUBLIC TRANSPORT TO THE VENUE DURING THE COVID-19 PANDEMIC



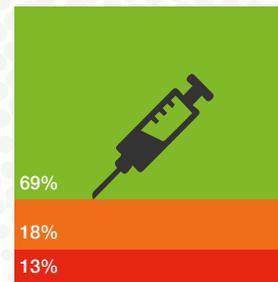
CLOSURE OF FOOD AND BEVERAGE AND RETAIL OUTLETS IN THE VENUE



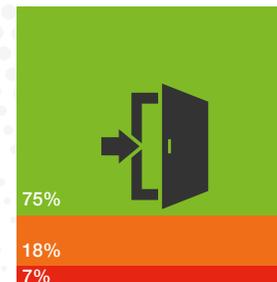
BEING ASKED TO ARRIVE AT THE VENUE MUCH EARLIER THAN NORMAL



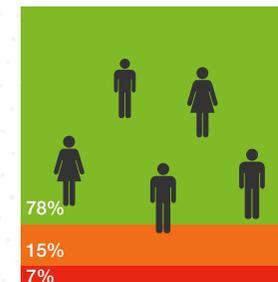
ALCOHOL BEING ON SALE AT THE VENUE



SPECIFIC AREAS FOR THOSE WHO HAVE RECEIVED A VACCINE



BEING ALLOCATED A SET TIME SLOT TO ENTER THE VENUE



SOCIALLY DISTANCED SEATING/STANDING AREAS

99% would consider attending events in an outdoor setting.
88% would consider attending indoor sports events.

Despite the difference in indoor versus outdoor events here, when asked about the measures that would give them confidence to purchase a ticket or attend an event results were comparable across all venue types.

A clear refund policy in the event of cancellation was the foremost factor in giving fans confidence. Hand cleanliness facilities and ability to socially distance is also important, but less importance is placed on the requirement for a face mask. It is also heartening that measures such as being allocated an (early) time to arrive or having socially distanced seating definitively does not put people off wanting to attend.

Overall, the now “usual” health and safety measures we have learnt to expect in relation to the prevention of the virus spread are all rated as statistically important, therefore the significance of having them in place and communicated should not be overlooked. With testing speeds increasing, the consideration of a Covid-passport and potential technological advancements in health safeguarding potentially emerging unexpectedly, it should be recognised that these results are relative to what fans are used to at the time of the survey being taken. Within the next four months, as technology, science and public understanding advances rapidly in relation to appropriate Covid-mitigation methods, the message to event organisers is that safety measures are important to spectators and the measures that are most trusted and habitualised in wider society at the time of the event will likely be what fans will look for to feel more confident to attend.

Whilst health measures are rated as important, it is interesting to see that spectators are generally most concerned with their financial outlay. Being sure of a refund in the event of cancellation and not seeing an increase in ticket prices indicates that despite the pandemic, value for money is still vital to consumers’ propensity to purchase. Equally, 61% said that the likelihood of long queues would possibly stop them wishing to attend, so the focus on brilliant basics shouldn’t be lost by organisers.

Travelling to the event using public transports still raises concerns, with 60% of people saying it would possibly stop them from attending, however this figure is slightly lower than in 2020. Being able to clearly communicate how to safely travel to the event using public transport will be an important task for event organisers. Whilst consideration of additional parking sites for venues could encourage spectators to

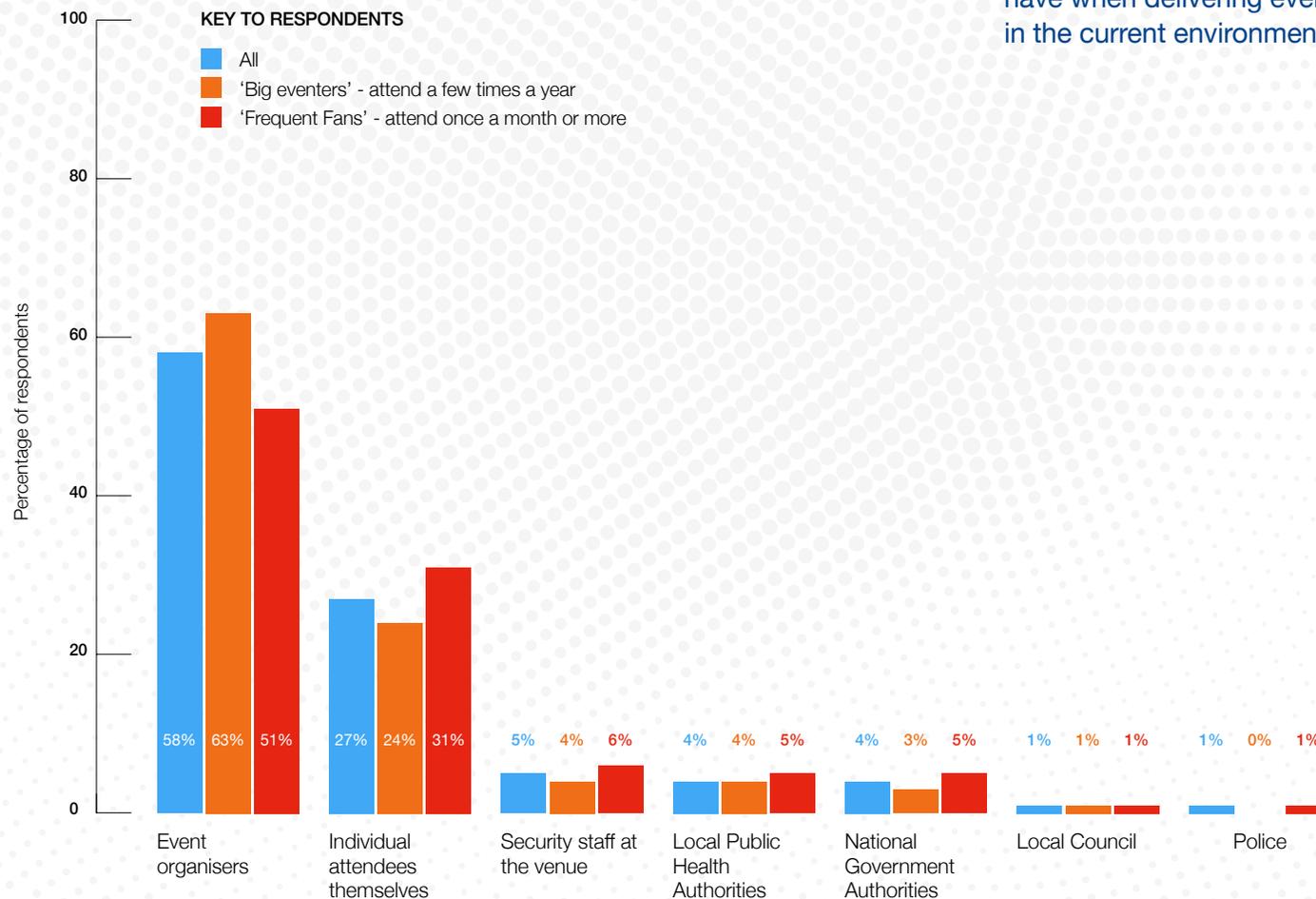
attend, the environmental impact of this shouldn’t be ignored, with the majority of fans agreeing that major sports events can help support a green economic recovery.

Event organisers should also consider what might be expected by their spectators following a year of new habits being formed. Venue cleanliness will likely be under closer scrutiny from attendees, and with hand sanitiser becoming a standard fixture in shop entrances, provision should probably be made for these, irrespective of what other health and safety measures are in place. Equally, people are likely to expect less physical contact, so contactless payment, e-tickets and technology-optimised security measures could be considered.

IF YOU WERE TO ATTEND A FUTURE EVENT,
WHO DO YOU CONSIDER TO BE
**MAINLY RESPONSIBLE FOR MAINTAINING
A COVID-SAFE ENVIRONMENT FOR ATTENDEES?**

58% of fans consider the event organisers as responsible for maintaining a Covid-safe environment for attendees, highlighting the significant responsibility event organisers have when delivering events in the current environment.

This also points to the need for event organisers to rapidly develop expertise in this area and as a result, the importance of the technical support and guidance offered to event organisers regarding mitigating the spread of coronavirus cannot be underestimated. A further 27% consider the individuals attendees themselves as responsible, highlighting that event goers have a significant role to play in keeping environments safe through actions at an individual level.



Interestingly for organisers, 'Frequent Fans' take more responsibility for maintaining their own safety than 'Big Eventers', once again showing that familiarity and trust for those who attend events more regularly is higher, and also shows the loyalty and support of those fans to their sport. One-off or annual events should consider what they can do with their pre-event communications to best familiarise their spectators with the event in advance and build trust and confidence.

SENTIMENTS



WHAT ARE YOU MOST LOOKING FORWARD TO ABOUT ATTENDING MAJOR SPORTS EVENTS IN THE FUTURE?



1 The **buzz** of live sporting action



2 **Supporting** my sport/ favourite athlete



3 A day out with **family and friends**



4 Having **something special** to look forward to that gets me out of the house



5 **Sharing** the live experience with other fans in the venue



6 **Seeing** elite athletes and competition



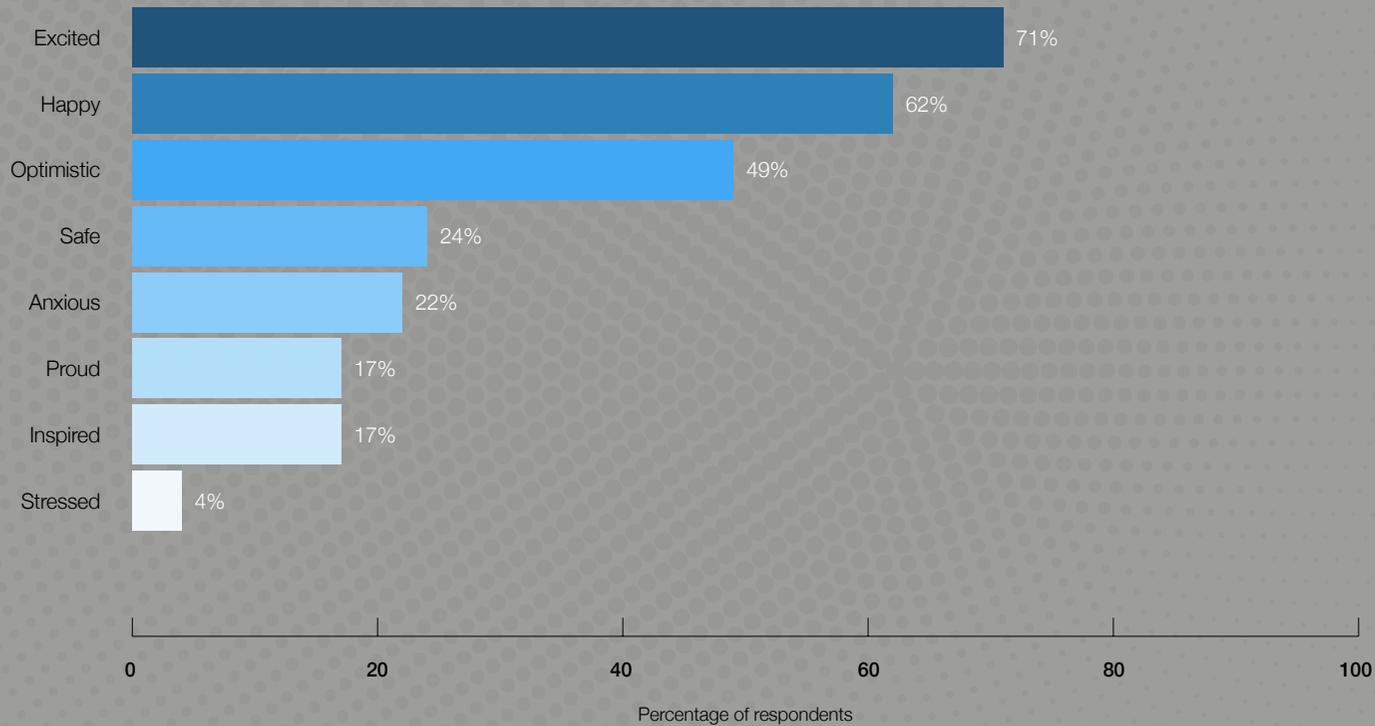
7 A feeling of things returning to **'normal'**



8 **Supporting** my local venue

Being able to spectate at events is exciting to many as it is an indicator that restrictions are likely to have been lifted, which signifies freedom that many have missed. Others also feel that the return of events will also mean being able to compete or volunteer again, and many are also excited about being able to participate in sport once more. As well as the experience of attending the event, the pre- and post-competition socialising is something people are looking forward to getting back to.

IF YOU WERE TO ATTEND AN EVENT, HOW DO YOU THINK YOU WOULD FEEL?



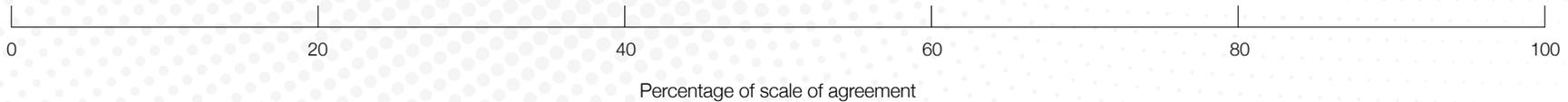
The coronavirus pandemic is considered by many to have had a significant emotional burden on society, with media and press reports regularly highlighting emotions such as a 'fear', 'nervousness' and 'concerns' throughout the pandemic. The above results clearly show that despite all of the negative emotion associated with the pandemic, respondents suggest that they will be 'excited', 'happy' and 'optimistic' when returning to events, and is evidence of the positive impact sport events can have on society. However, feelings of anxiousness are still prevalent, highlighting again the important role event organisers have in assuring spectators they are not at risk when attending their event.

HOW DO YOU FEEL ABOUT MAJOR SPORTS EVENTS?

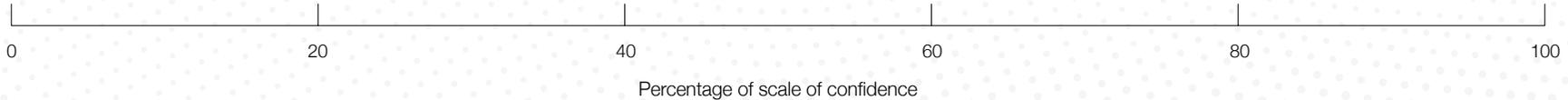
2021

2020

Note: Agreement/
confidence defined
as score of 6 or
higher, 5 being
neutral and 4 or
lower showing
disagreement/lack
of confidence



IN THE CURRENT CONTEXT OF THE COVID-19 PANDEMIC, TO WHAT EXTENT ARE YOU **CONFIDENT** THAT MAJOR SPORTS EVENTS IN THE UK CAN **SURVIVE/CONTINUE WITHOUT FINANCIAL SUPPORT** FROM THE GOVERNMENT?



ANALYSIS

The sentiments reflected in the results of this research are positive for the sport events industry. As of the end of March 2021, sports fans remain committed to attending sports events, their desire to return aligns with, and has potentially been steered by, the roadmaps for easing restrictions, and they are accepting that their experience of attending events is likely to be different to that of a pre-Covid world.

There is however concern for the future of events in general, with

fans citing funding concerns and acknowledging that continued support from the government is vital. In corroboration with these results, sport has seen a healthy support package granted, in acknowledgement of the positive impact sport and events can have on society at large.

It is clear that major sports events in the UK remain integral to the day to-day fabric of our communities, the well-being of individuals, and the wider benefits events create; all of which have been missed while the country

has been in lockdown to prevent the spread of coronavirus. This is reflected in the increase in positive sentiment about major events since last summer.

The return of spectators to sports events is considered an important indicator of the UK returning to 'normal' as the country cautiously looks to ease restrictions. The return of major sports events will also generate significant economic activity and allow venues to continue to be financially viable, to boost local economies and support jobs which are

integral to the sports events industry in the UK. Safety and spectator experience will be important to fans whilst at an event, but respondents are clear on the wider economic and wellbeing benefits which events can provide to the UK, and the value of government support to the sector.

The industry can see these results as a positive indication that sports fans continue to support major events, increasingly recognise their importance and, as soon as it is safe to do so, will return to spectate.



If you have any questions about the data presented in this report, please contact info@uksport.gov.uk

The Return to Major Sports Events survey was created and managed by Indigo Ltd on behalf of UK Sport. Indigo Ltd provides smart, sensible and practical consultancy, and has led on cultural audience sentiment tracking during Covid-19 through a series of large-scale national research projects - including After the Interval, Act 2 and the ongoing Culture Restart Toolkit - which have gathered over 300,000 responses so far.

For more information please visit www.indigo-ltd.com

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