

A red shield-shaped logo with the words "LONDON SPORT" in white, bold, sans-serif capital letters.

**LONDON
SPORT**

A woman with short, curly brown hair, wearing a light blue polo shirt, is shown in profile from the chest up. She is looking towards the left with a slight smile. Her hands are clasped in front of her. She is wearing several pieces of jewelry: a watch on her left wrist, a ring on her left hand, and multiple bracelets on her right wrist. A thick red line curves across the top of the image, starting from the left and ending on the right. The background is blurred, showing what appears to be an indoor sports facility.

PLANNING FOR LONDON'S ACTIVE FUTURE

How the demographic change of London's population from 2025 to 2035 will impact the demand on Sport and Physical Activity Facilities

JUNE 2026



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SUMMARY





SUMMARY OF FINDINGS

400,000 more Londoners

High growth in deprived boroughs

25% more aged 65+

10% fewer under-16s

Change in type of need

288 more SPA facilities needed

For the first time, London Sport has modelled how demographic change between 2025 and 2035 will reshape demand for sport and physical activity (SPA) facilities¹ across the capital.

This analysis reveals a critical shift: demand is not simply growing - it is changing in who it comes from, where it will be concentrated, and what types of facilities will be needed. Planning based on today's patterns will not meet tomorrow's need.

A changing demand profile

London's population is projected to grow by over 400,000 people by 2035, but significant pressure will come from demographic change in addition to the headline growth. Demand will rise sharply among older adults, with a 25% increase in those aged 65+ in London. Around half of this group will have multiple long-term health conditions². The result will be a greater need for accessible, inclusive, and health-oriented facilities.

At the same time, a 10% decline in children and young people risks creating a false signal of reduced demand - potentially leading to the loss of facilities that will still be essential to overall system capacity. Crucially, declining demand from one group will be more than offset by growth in another. There is no surplus capacity - only shifting need.

The scale of the challenge

To simply maintain 2025 levels of provision, London will require the equivalent of 288 additional sport and physical activity facilities, on top of the 10,621 currently in place. Without this expansion, provision per head will fall - deepening existing inequalities and limiting opportunities to be active.

Inequality will widen without targeted action

Population growth and demographic change will not be evenly distributed. Some of London's most deprived boroughs - already underserved by sport and physical activity facilities - are set to experience the fastest growth. For example, Tower Hamlets is projected to grow by 7.9% - well above the London average of 4.4% - and is already one of the lowest ranking boroughs in London for sport and physical activity facility provision. Similar patterns are seen across other high-need boroughs.

This means that, if London does not act decisively, the gap between well-served and underserved communities will widen further.

Recommendations of where we must focus to meet 2035 demand

This new evidence points to five clear priorities:

1. Protect existing facilities

Sport and physical activity facilities must not be lost in response to short-term, localised declines in demand, pressures to take space for housing, or failure to mitigate the risks of climate change. The overall capacity needs to increase, not decrease. Existing facilities that come under threat due to reduced numbers of children and young people should be re-purposed or replaced.

2. Target investment where need will grow fastest

The impact of demographic change will be felt most keenly in boroughs that are growing, and ageing, the fastest. Some of these boroughs are already among the most underserved for sport and physical activity facilities and currently the least active. Barking & Dagenham, Newham and Tower Hamlets, followed by Brent, Lambeth and Lewisham should be prioritised to prevent this inequality in provision from growing further.

3. Expand capacity beyond new builds

Meeting demand will require more than capital investment. Immediate gains can be made through extended opening hours, increased utilisation of existing assets and greater use of non-traditional spaces - including empty retail units, and community spaces such as schools. We are calling for:

- Resumption of Opening School Facilities programme
- Investment in non-traditional spaces, including initiatives like the Lambeth CommUNITY project

1. Definition: A 'facility' represents a specific opportunity for activity within a site. Facilities are categorised by type - such as swimming pool, grass pitch or gym. Every facility has a unique Facility ID. Source: [Active Places Power](#)

2. [age-uk-briefing-state-of-health-and-care-july-2023-abridged-version.pdf](#)



SUMMARY OF FINDINGS *continued*

25% of Schools open facilities to community

4:1 return on investment in sport and physical activity

- Incentives, such as rate relief, for commercially owned facilities to work with priority groups and reduced rents for Community Sport providers, for whom cost is a huge barrier to hosting sessions in clean and accessible indoor spaces.
- Parks and green spaces play a role in promoting activity and are highly valued by Londoners³. Making these spaces more appealing - ensuring they have toilets, are clean, have relevant sessions, and are safe – could increase their usage across demographics.

4. Plan for an ageing population

Facility design, programming, welfare support, and workforce capability must adapt to meet the needs of a rapidly growing older population.

The likelihood of multiple long-term health conditions increases with age (see appendix) and adults aged 65+ are the most likely group to be ‘insufficiently active’. These factors must be a consideration in future planning.

- Investment will be needed to fully understand barriers to activity for this group and develop initiatives that reduce inactivity.
- Ensuring that new facilities are flexible, both in terms of the range of possible activities and flexible access requirements, will further future-proof provision to meet the needs of the future population.
- There will be a greater need to introduce Safeguarding Adults training and compliance measures. At present, awareness and understanding of safeguarding responsibilities toward adults is limited, particularly among clubs that are not affiliated with NGBs⁴. There is also a risk that opportunities to effectively safeguard adults could be missed. Strengthening knowledge and embedding appropriate practices across all clubs will be essential to ensure safe and inclusive environments for participants of all ages.

5. Take a whole-system approach

Facility planning alone will not be sufficient. A whole-system approach, with a joint strategy, would align resource to effectively focus on key challenges and reduce conflicting actions. A coordinated response is needed across:

- Workforce planning and development
There will be a need for more people, with an evolving mix of skills to deliver appropriate programmes.
- Health and care integration
The NHS 10-Year Plan⁵ commitments, which include ‘Hospital to Community’ and ‘Sickness to Prevention’, will encourage earlier interventions by health professionals to increase residents’ activity levels.
Sport and physical activity providers will need to link with health professionals and provide capacity for such interventions.
- Education and school estate planning
London schools are being closed or merged due to falling pupil numbers⁶.
44% of sports halls, 28% of playing fields and 16% of the swimming pools in London are located behind school gates, and just 25% of these schools open their facilities for community use⁷.
- Local, GLA and national government policy
The Department for Culture, Media and Sport have recommended in April 2026 that Government double spending on sport and recreation in England over the next 10 years⁸.

Evidence from Sport England shows a 4:1 return on investment in sport and physical activity⁹. A joined-up approach gives the best chance to build further on this return.

3. [Open parks matter most for physical activity in London - London Sport Data Hub](#)

4. [2024 in Review - Safeguarding Adults in Sport - Ann Craft Trust](#)

5. [NHS England » Fit for the Future: 10 Year Health Plan for England](#)

6. [Sharp decline in London pupil numbers puts school standards at risk | London Councils](#)

7. London Sport proprietary analysis, 2024

8. [Game On: Community and school sport](#)

9. [Social value and return on investment of sport and physical activity | Sport England](#)



SUMMARY OF FINDINGS *continued*

To maintain 2025 provision:

All facility types across London, £200m

Priority facility types in priority boroughs, £15m

Moving beyond maintenance

Maintaining current levels of provision of facilities is not enough to meet London’s future needs. This research highlights an opportunity - and necessity - to go further: to reduce longstanding inequalities in access to sport and physical activity across the capital. Meeting future demand must be aligned with a broader ambition to support the growing number of insufficiently active Londoners and ensure that access to facilities is equitable, inclusive, and sustainable. To achieve this, investment should be prioritised towards the facilities facing the greatest increases in demand, particularly in boroughs that are already the most underserved:

	To maintain 2025 provision	To reach London average
Barking & Dagenham	3 Sports Halls, 3 Studios, 2 Gyms	3 Sports Halls, 12 Studios, 11 Gyms
Brent	3 Sports Halls, 2 Gyms, 2 Studios	16 Gyms, 26 Studios
Lambeth	2 Gyms, 1 Sports Hall, 1 Studio	13 Sports Halls
Newham	4 Sports Halls, 3 Gyms, 2 Studios	3 Sports Halls, 15 Gyms, 27 Studios
Tower Hamlets	4 Gyms, 3 Sports Halls, 3 Studios	2 Gyms, 10 Sports Halls, 7 Studios
Lewisham	2 Gyms, 1 Sports Hall, 1 Studio	9 Gyms, 14 Sports Halls, 13 Studios

The cost to maintain 2025 provision in 2035 of Sports Halls, Studios and Health & Fitness Gyms in just the 6 priority boroughs shown above would be around £15m [note: To increase provision of the same facilities in the same boroughs to meet the London average would cost around £45m]. The cost to maintain 2025 provision across London overall exceeds £200m¹⁰.

Acting now

Population change is already under-way, system-partners are already responding, but lead times to activate facilities can be lengthy. This evidence provides a clear direction for action - enabling London to respond proactively, rather than reactively, to the demands of the next decade. The decisions made now will determine whether London’s sport and physical activity infrastructure can meet the needs of its future population.

10. Source: based predominantly on Sport England estimates (see appendix)



SUMMARY OF METHODOLOGY



No single data source was identified that could answer the central question of this research – ‘How the demographic change of London’s population from 2025 to 2035 will impact the demand on sport and physical activity facilities’.

The sources were selected based on their relevance (contains the required data to answer specific element of the central question, coverage of London), data quality (data is robust and reliable), availability (accessible, recent, affordable), and potential for data integration.

Sources were therefore identified that could answer the central question if combined appropriately.

The sources used were:

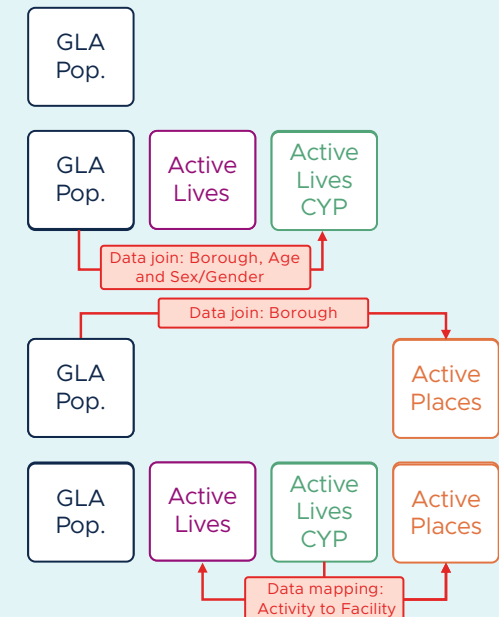
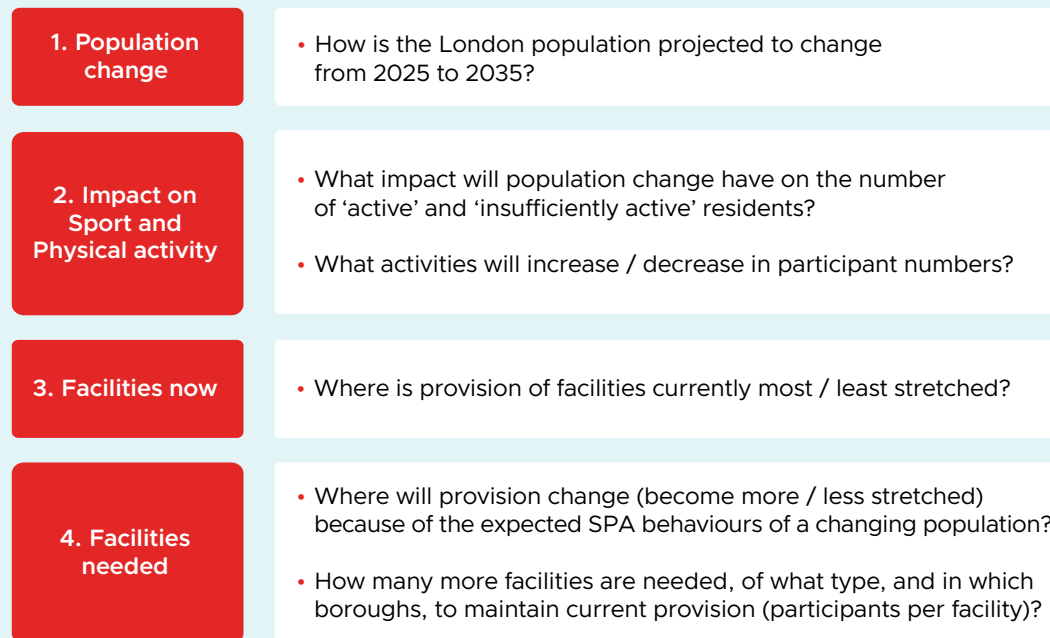


GREATER LONDON AUTHORITY

TRAJECTORY



The diagram below shows how the central question was answered through a series of sub-questions, which data were used for each, and how they were combined.





SUMMARY OF METHODOLOGY *continued*

The mapping used to integrate Activity and Facility data in step 4 ('Facilities needed') are shown below for Adults and Children & Young People (CYP).

ADULTS	Fitness Class	Indoor Swim Area	Yoga	Golf	Tennis	Outdoor Swim Area	Football	Pilates	Gym Session	Badminton	Dance	Basketball	Cricket	Squash	Gymnastics	Bowls	Netball	Track & Field	Trampolining	Volleyball	Rugby Union	Hockey		
Artificial Grass Pitch							Match																Match	
Athletics																		Match						
Golf				Match																				
Grass Pitches							Match						Match										Match	
Health and Fitness Gym									Match															
Indoor Bowls																	Match							
Indoor Tennis Centre	Match		Match		Match		Match	Match		Match	Match	Match						Match						Match
Outdoor Tennis Courts					Match		Match					Match						Match						Match
Sports Hall	Match		Match				Match	Match		Match	Match	Match	Match		Match	Match	Match			Match	Match			Match
Squash Courts														Match										
Studio	Match		Match					Match			Match				Match									
Swimming Pool (sqm)		Match				Match																		

Children & Young People	Football	Dance	Running/ Athletics	Swimming / WaterPolo / Diving Area	Basketball	Trampolining	Gymnastics	Tennis	Dodgeball	Martial Arts	Netball	Cricket	Rugby	Badminton	Hockey	Rounders	Field Athletics	Ice Skating	Volleyball	Golf			
Artificial Grass Pitch	Match														Match								
Athletics			Match															Match					
Golf																							Match
Grass Pitches	Match											Match	Match				Match						
Health and Fitness Gym																							
Ice Rinks																			Match				
Indoor Bowls																							
Indoor Tennis Centre	Match	Match			Match			Match			Match			Match	Match								
Outdoor Tennis Courts	Match				Match			Match			Match				Match								
Sports Hall	Match	Match			Match	Match	Match		Match	Match	Match	Match		Match	Match							Match	
Squash Courts																							
Studio		Match					Match																
Swimming Pool				Match																			

A full technical write-up of the methodology can be found in: [TL1 Methodology Write Up.docx](#).

2

POPULATION CHANGE

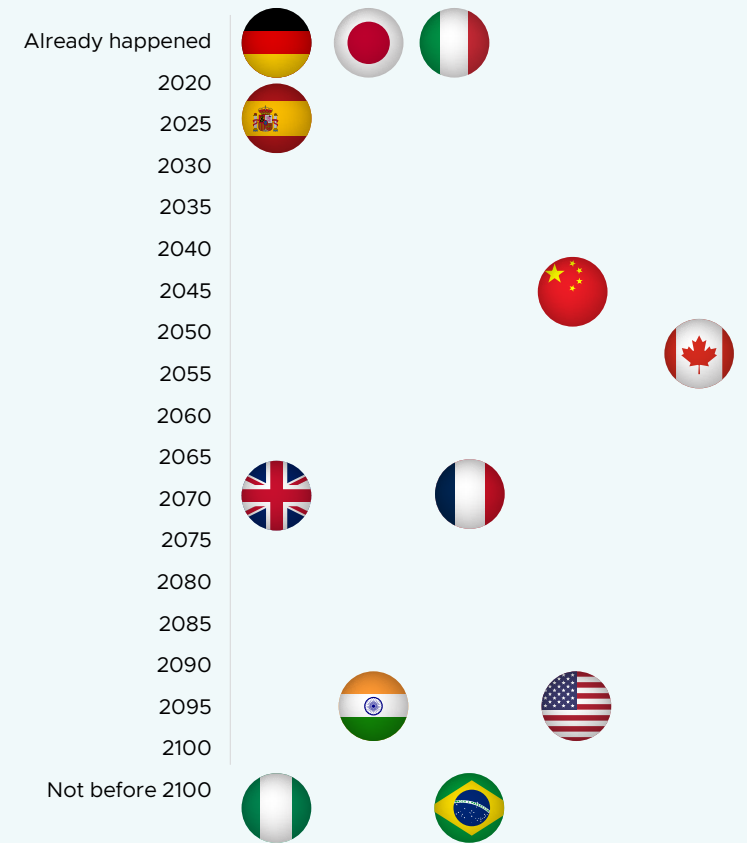




POPULATION CHANGE: SETTING THE SCENE

- Populations around the world are, as ever, changing. Falling birth ('fertility') rates will result in over-60s outnumbering under-30s for the first time across multiple major economies as we move through the 21st century. In the UK, in 1975 about 1-in-5 people were over 60, in 2025 it's 1-in-4, and 50 years from now it will be 1-in-3. And most of that growth is coming from the over-75s¹¹.
- A fertility rate of around 2.1 is required to replace a population. In 2024 the fertility rate across England and Wales was 1.4. Reasons for the declining rate are both transient and established:
 - **Cost of Living:** Kids are expensive. In addition to all the capital expenditure – cots, highchairs, buggies, car seats – there's the high running costs – formula, food, clothes, toys. Not feeling you have the financial headroom is a very good reason not to start a family or to add to one.
 - **Cost of Childcare:** Recent changes have made childcare more accessible but in dual income households (now the norm) it still leaves spillover costs and a logistical nightmare. Uneven parental leave and other policy disincentives – such as the now repealed two-child benefit cap – have been a barrier.
 - **Wider Anxiety:** Anxiety about external crises, such as climate breakdown, is regularly cited as a disincentive to have children. Not wanting to bring kids into the current world is an understandable starting point.
 - **Covid-19:** Research conducted at the outset of the pandemic found, of UK adults who had been planning to have children, around 3-in-5 postponed their plans, and a further 1-in-5 abandoned those plans altogether.

Point at which over 60s will outnumber under 30s

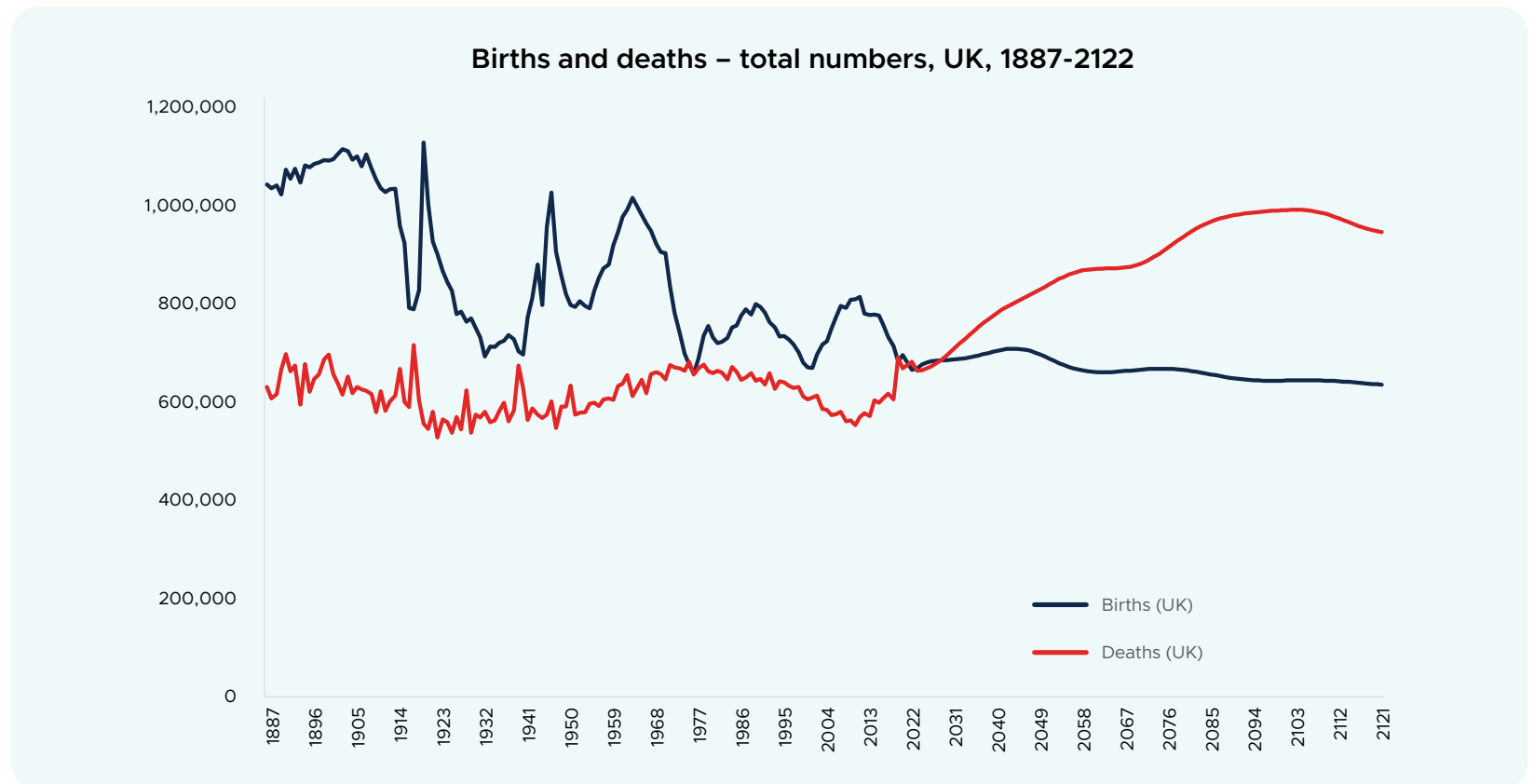


11. Source: Trajectory / ONS / UNWPP



POPULATION CHANGE: SETTING THE SCENE *continued*

- Before 2026, there have only been two years (since the 1880s) when there were more deaths than births recorded in the UK. The most recent being 2020, when the pandemic caused a drop in births and a dramatic spike in the number of deaths.
- But from 2030, every year, in perpetuity, more people in the UK will die than are born. By the end of the century, the number of deaths will be close to double the number of births.
- The impact is not just fewer children and young people. It is an increasing average age of the population. In 1975, the median average age of the UK population was 33 years. In 2025 the median age is 40 years. In 2100, it will be 48 years.
- Despite falling fertility rates and deaths outnumbering births, the UK population will continue to grow – and the reason is immigration.

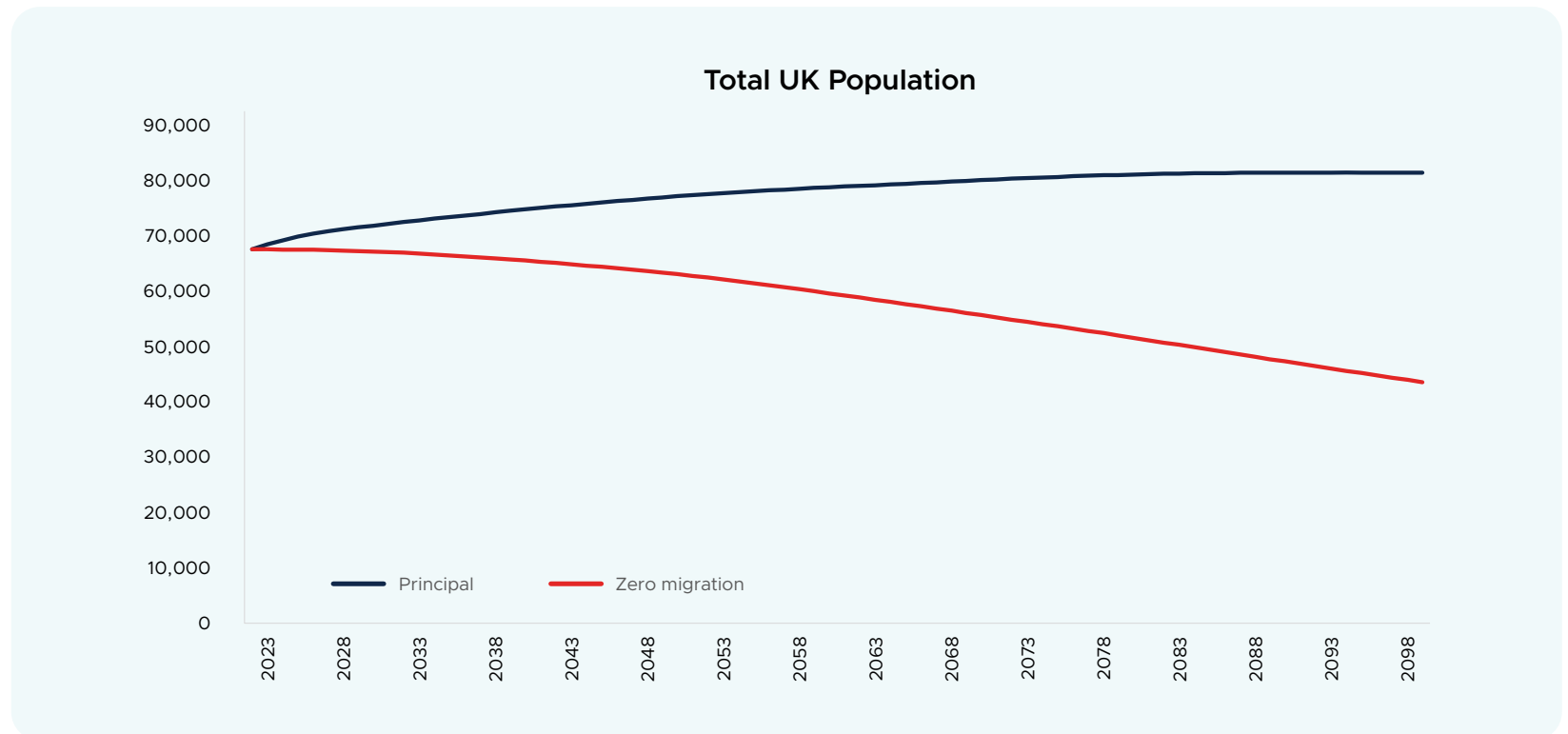


[Source: Trajectory / ONS / UNWPP]



POPULATION CHANGE: SETTING THE SCENE *continued*

- The overall UK population is expected to grow by around 5.5% from 2025 to 2035¹².
- If there were zero migration, the UK population would now be entering a phase of steep decline in numbers and, as the majority of immigrants are young working-aged adults, we would also expect a faster increase in average age.
- The UK requires around 340k net migrants every year to avoid population decline, and London is the gateway to the UK for many.
- Alongside an ageing and growing population, we should consider that the wants and needs of growing number of non-UK born Londoners will be a factor in shaping the sport and physical activity requirements in London [see Appendix]

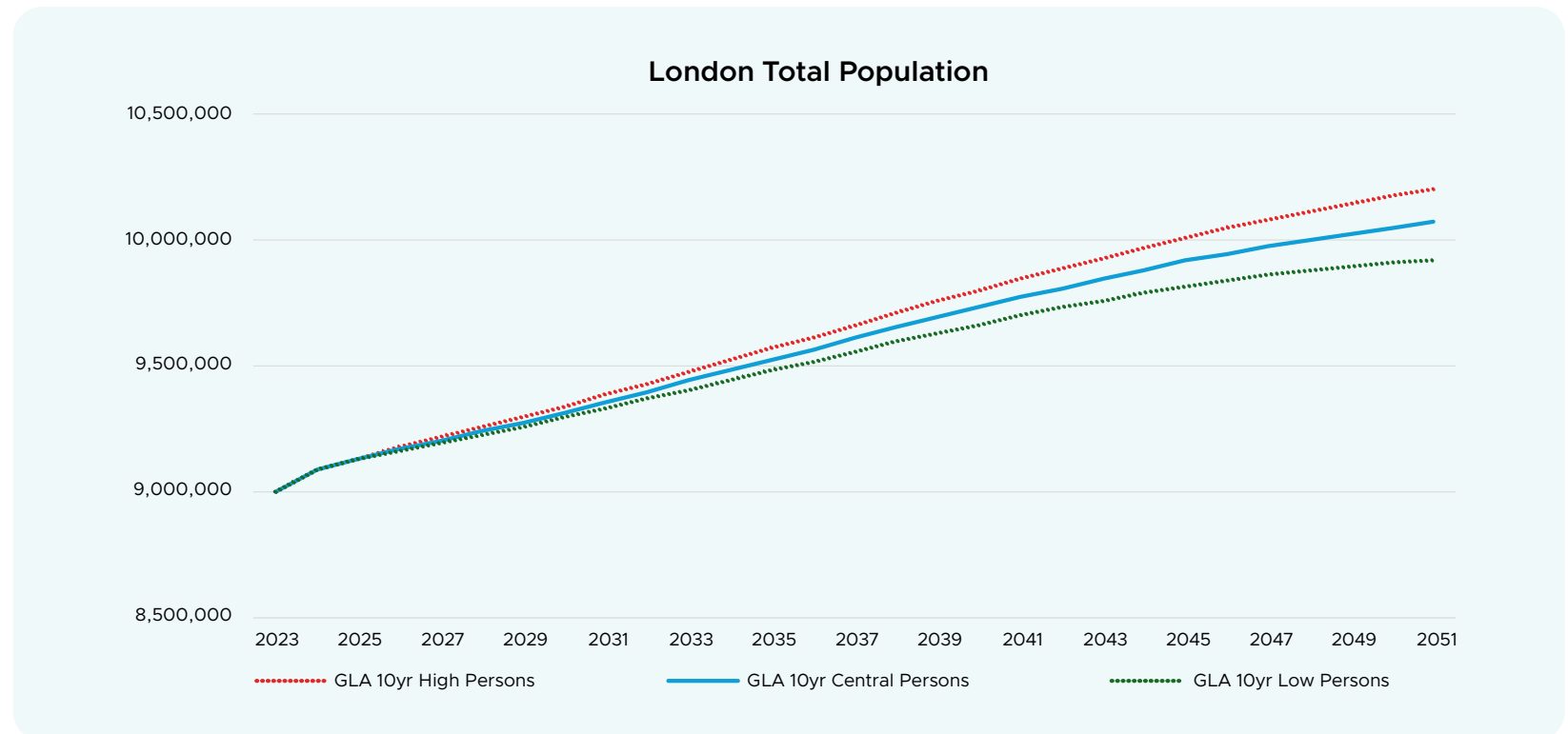


¹². [National population projections - Office for National Statistics](#)



SPORT AND PHYSICAL ACTIVITY FACILITIES IN LONDON WILL BE SHARED AMONG AN INCREASINGLY LARGE POPULATION BY 2035

- The London population is large. London has 9.1 million residents in 2025, which is more than Scotland and Wales combined¹³.
- London's population is projected to grow by 400k people from 2025 by 2035¹⁴, which is more than the current population of Leicester¹⁵.
- There is little difference between the High, Central and Low persons projections at the 10-year horizon. All scenarios show a similar and sustained rate of population increase for London.
- **Existing facilities, space and resources will be shared between an increased number of residents unless capacity increases.**



13. [Estimates of the population for the UK, England, Wales, Scotland, and Northern Ireland - Office for National Statistics](#)

14. GLA 10yr Central Persons projection

15. [Estimates of the population for the UK, England, Wales, Scotland, and Northern Ireland - Office for National Statistics](#)



TYPES OF FACILITIES REQUIRED WILL CHANGE AS THE POPULATION AGES

289k more aged 65+

148k fewer
under-16s

90 schools closed/
merged in last
5 years

- London will experience growth across all adult age cohorts.
- Among working age adults (16-to-64 years) the increase will be close to the overall London increase of 4.4%. For 65+ year-old adults the increases will be 25% (+289k people), and fewer births means London will be home to 10% (-148k) fewer children and young people.
- **These changes will significantly change demand for facilities and services. There will be increased demand overall from a growing population, but the demand will change as numbers within age cohorts change. So existing facilities may need to become more flexible.**
- Those catering for Children & Young People may see lower demand due to fewer numbers. If facilities like school sports halls are closed because of falling numbers of Children & Young People, then capacity for others in the community, as well as future generations, is also lost.
 - London Council's 2026 report '*Managing school rolls and maintaining educational standards in London*' state declining pupil numbers are raising the risk of more school closures, in addition to the approximately 90 school closures or mergers that have already happened over the last 5 years (see *Appendix*).
- **At the other end of the scale, those providing for 65+ adults will need to increase capacity by 25% simply to keep pace with increased demand.**
- NHS guidance is that older adults should do some type of physical activity every day¹⁶ to improve quality of life and help maintain independence¹⁷.
- As Health partners move toward a 'Prevention focussed' approach as part of their strategy to address the ageing population, we may also see prompts for lifestyle change much earlier in life. Not a focus of the analysis in this report, but success in this approach could accelerate the increase in demand on Sport & Physical Activities facilities.



¹⁶ Source: *Physical activity guidelines for older adults - NHS*

¹⁷ Source: *Exercise and keeping active as an older adult - Overview | Guy's and St Thomas' NHS Foundation Trust*



TYPES OF FACILITIES REQUIRED WILL CHANGE AS THE POPULATION AGES *continued*

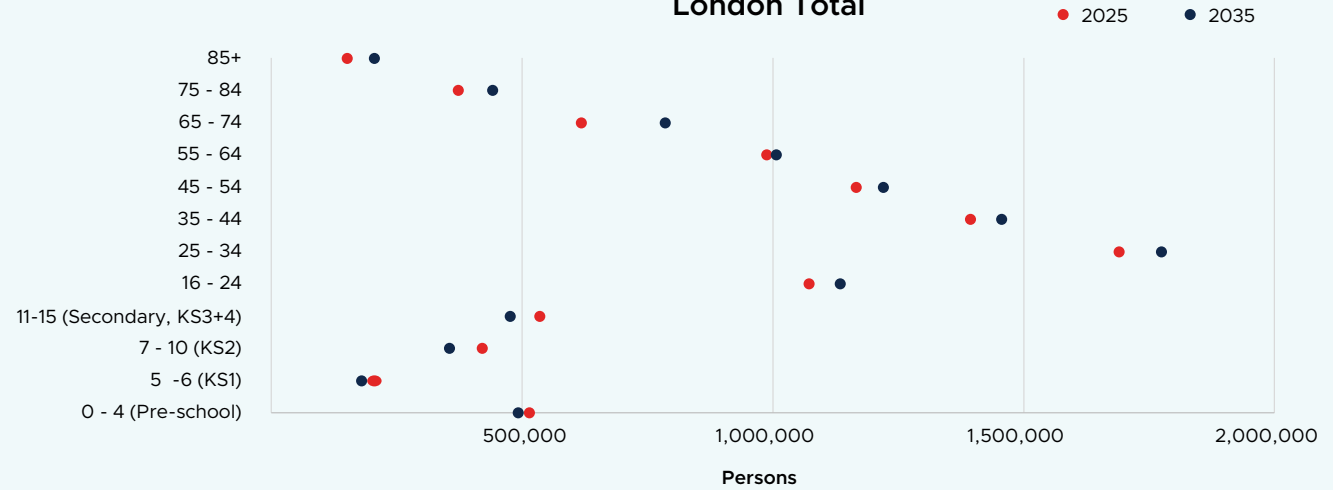
London skews toward younger adults

All adult groups growing in number

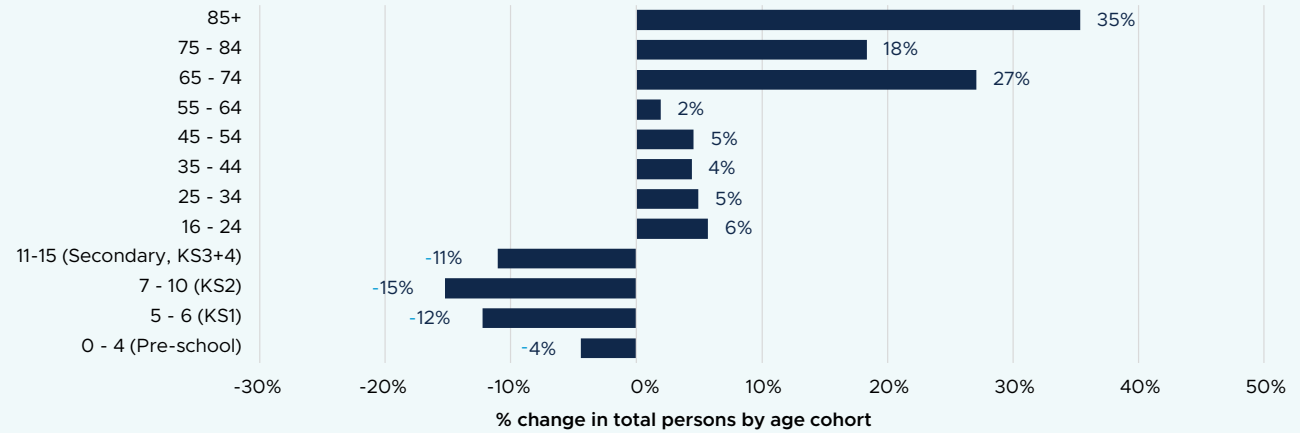
All child and young people groups in decline

Largest % growth among older adults

Age Profile (2025 and 2035 projection): London Total



Age Profile Change (2025 to 2035 projection): London Total



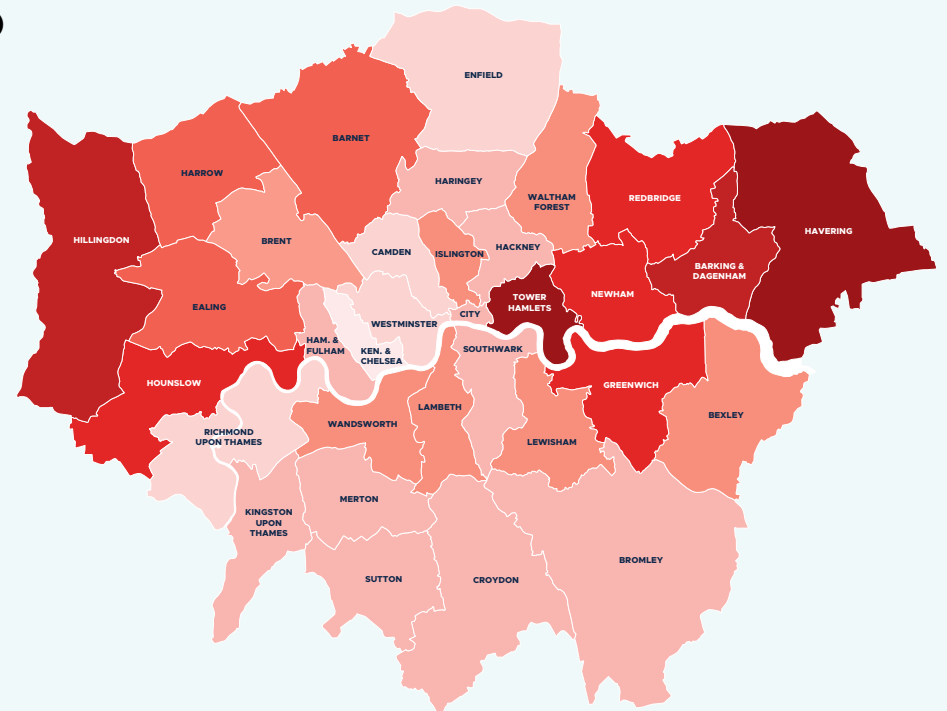
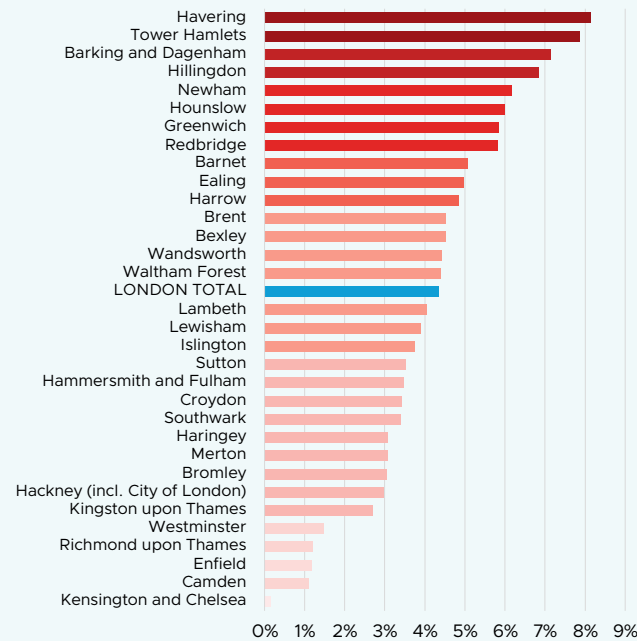


COMMUNITIES WITH THE HIGHEST PROJECTED POPULATION INCREASES WILL BE DISPROPORTIONATELY IMPACTED

- Boroughs projected to increase in size the most are **Havering (8.1%)**, **Tower Hamlets (7.9%)** and **Barking & Dagenham (7.1%)**.
- These charts show the % increase in population projected for each London borough from 2025 to 2035.

4.4% growth for London overall

**% increase in population by Borough
(GLA 10 year Central Projection, 2025 to 2035)**





MANY BOROUGHS HAVE ALREADY EXPERIENCED LARGE POPULATION GROWTH IN THE LAST 15 YEARS

- The 2025 to 2035 projected increases follow large population increases for some of the same boroughs between the 2011 and 2021 Census.
- The largest population increases in London between 2011 and 2021 were in Tower Hamlets and Barking and Dagenham, where the populations have grown by 22.1% and 17.7% respectively, relatively recently.
- This shows a sustained period of growth well above the London average in both boroughs.

Tower Hamlets growth:

22.1%, 2011 to 2021

+ 7.9%, 2025 to 2035

Barking & Dagenham:

17.7%, 2011 to 2021

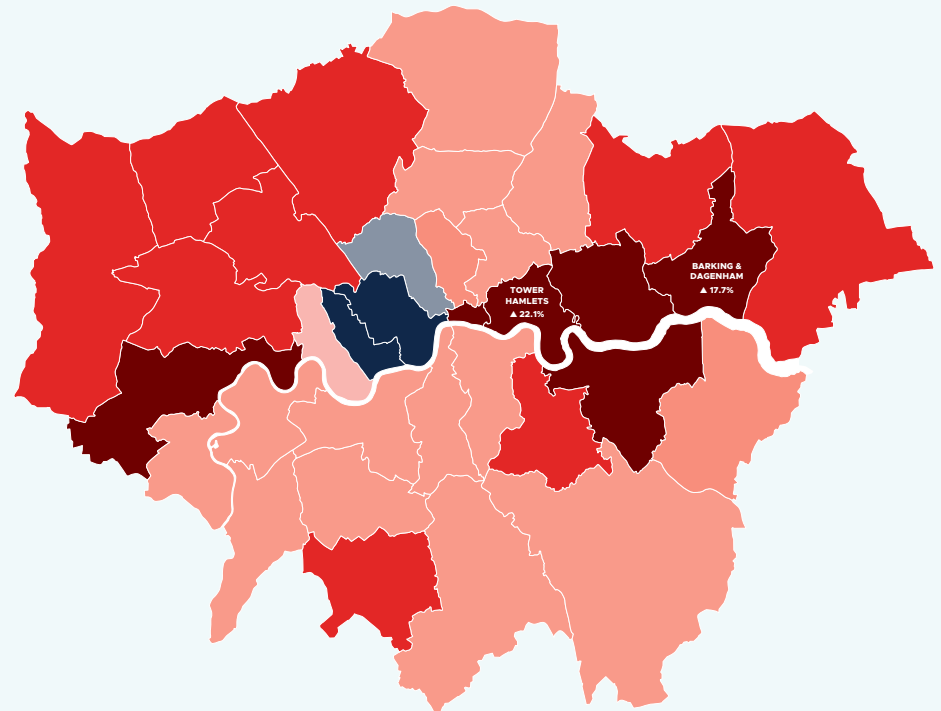
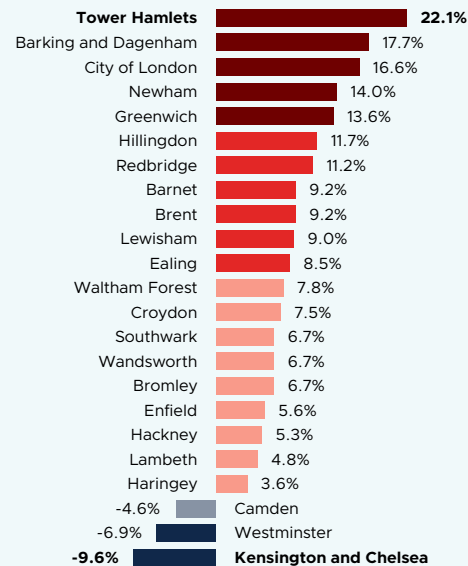
+ 7.1%, 2025 to 2035

Newham:

14.0%, 2011 to 2021

+ 6.2%, 2025 to 2035

Population change of selected local authority areas in London between 2011 and 2021





SOME OF THE MOST DEPRIVED BOROUGHS IN LONDON WILL EXPERIENCE THE LARGEST POPULATION INCREASES

- The largest borough level population increases will continue to be experienced by some of London's most deprived boroughs, as calculated in the Indices of Multiple Deprivation (IMD) 2025 release.
- Population change is not being experienced equally.
- Tower Hamlets, Barking & Dagenham and Newham are all among the 20 most deprived Local Authority areas in England¹⁸.
- **Some of the most deprived boroughs in London are projected to experience the largest population increases. The challenge to provide adequate facilities, programmes and workforce in these boroughs will become increasingly difficult.**

Of c300 Local Authority Districts in England:

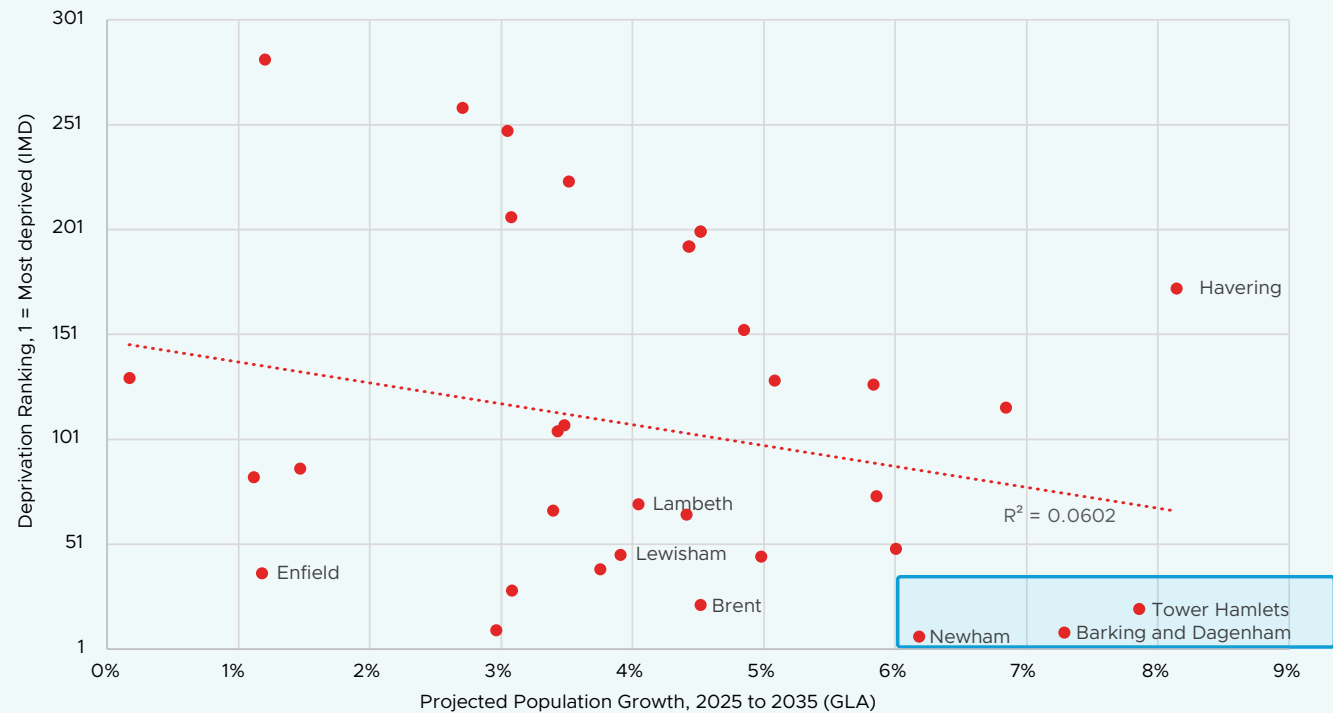
Newham, 7th most deprived

Barking & Dagenham, 9th

Hackney, 10th

Tower Hamlets, 20th

Population Growth x Deprivation Rank

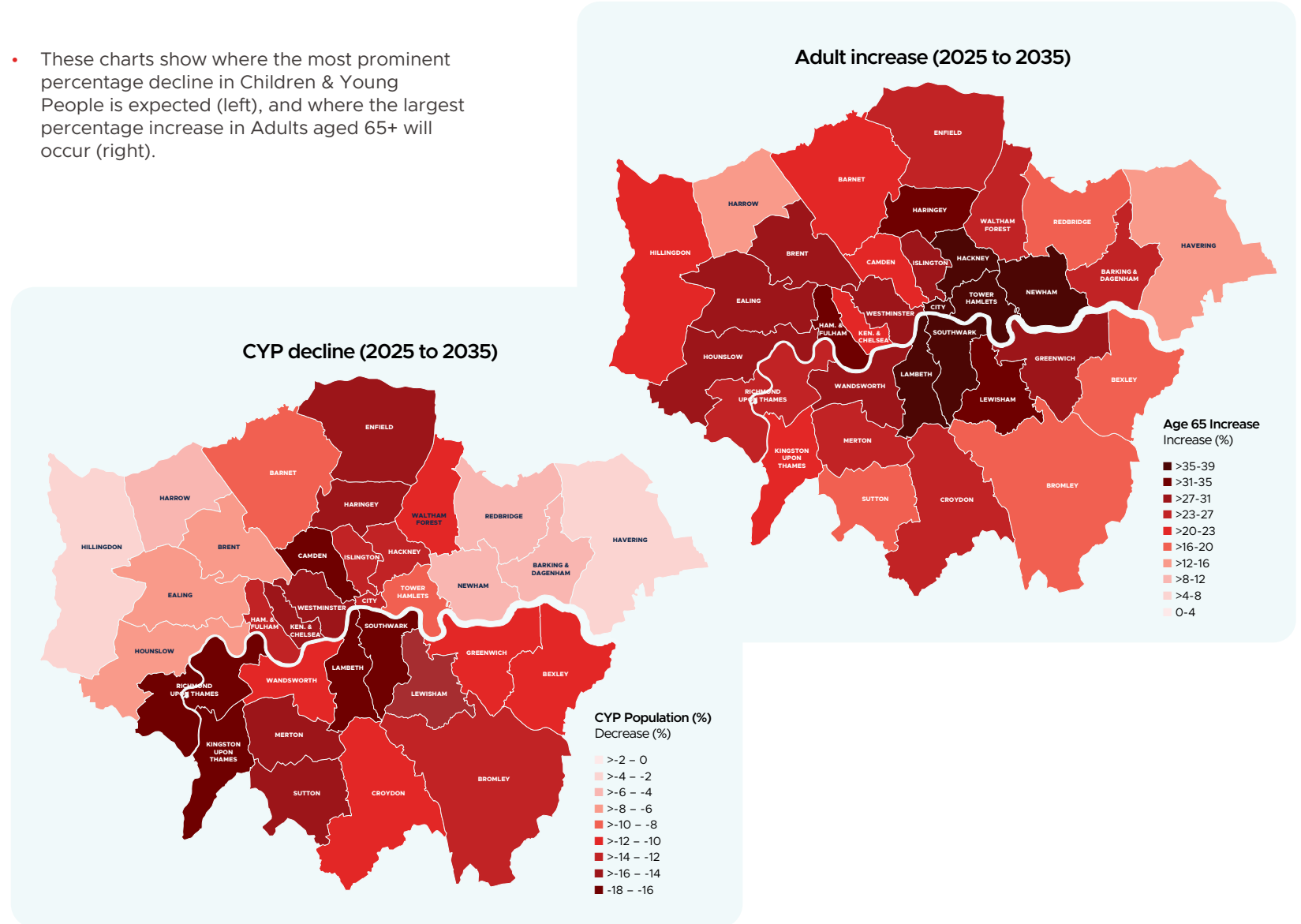


¹⁸ Source: English indices of deprivation 2025: statistical release - GOV.UK



THE SHIFT IN AGE PROFILE WILL ALSO NOT BE EXPERIENCED EQUALLY

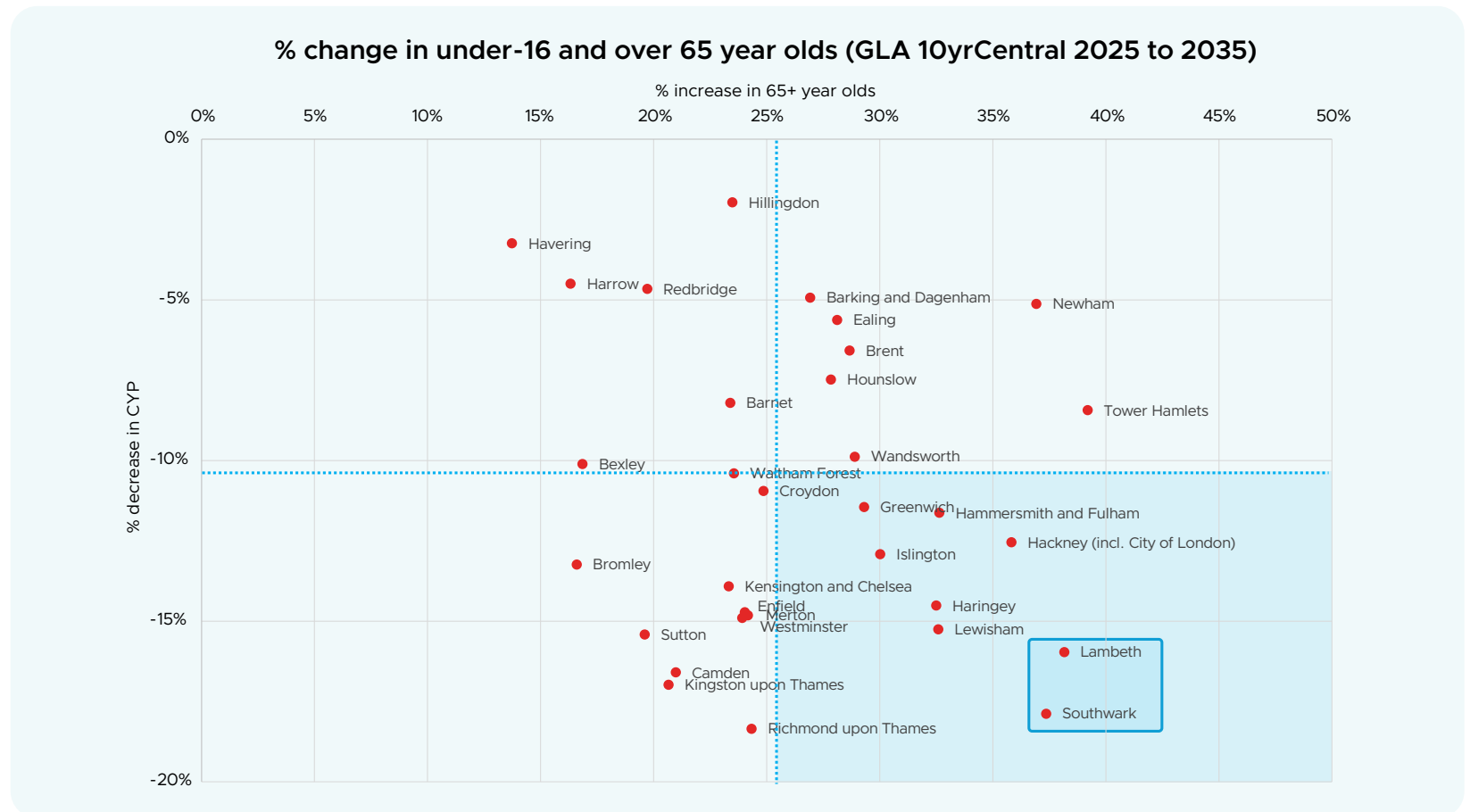
- These charts show where the most prominent percentage decline in Children & Young People is expected (left), and where the largest percentage increase in Adults aged 65+ will occur (right).





POPULATION CHANGES WILL NOT BE EXPERIENCED EQUALLY

- When changes in Children & Young People and Adults are combined, Lambeth and Southwark are shown to be the boroughs set to experience the biggest shift in population makeup. With among the highest % growth in those aged 65+ (38% and 37% respectively), and the largest % decline in Children & Young People (-16% and -18%).
- Tower Hamlets and Newham will also experience some of the largest % increases in those aged 65+.
- **These boroughs will require among the most pronounced shifts in age specific Sport & Physical Activities facilities, health services, sport welfare support and programmes to scale up their provisions for older adults.**



3

IMPACT ON ACTIVITY

LONDON LEVEL





CHANGES IN NUMBERS OF BOTH 'ACTIVE' AND 'INSUFFICIENTLY ACTIVE' PEOPLE WILL CREATE NEW CHALLENGES

Meeting CMO guidelines:

65 to 74YO, 61%

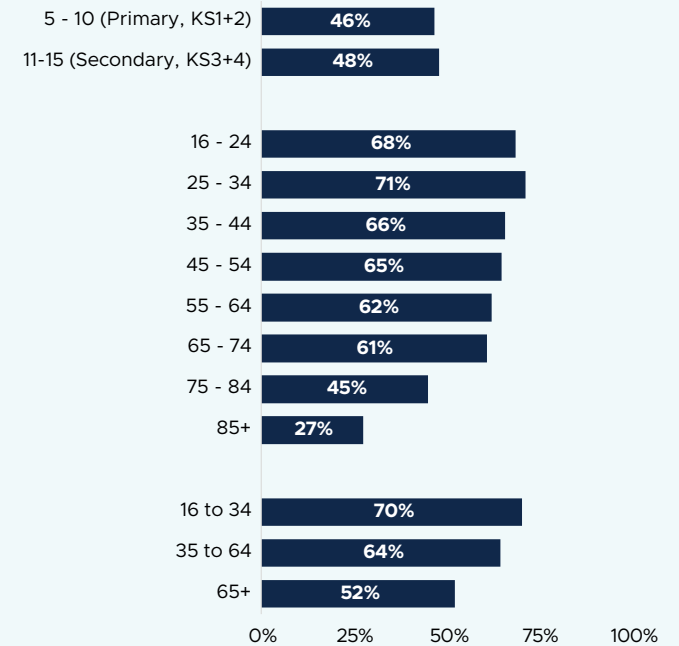
75 to 84YO, 45%

85+, 27%

- 'Active' is defined as those meeting the Chief Medical Officers activity guidelines for their age cohort:
 - Children & Young People = 60mins/day
 - Adults = 150min/week
- Activity levels are lowest among older adults.
- The least active age bands are set to see some of the largest increases in population as London population ages.
- The overall impact is that, as the London population ages, we would expect to see a higher proportion of adult Londoners being 'insufficiently active' (i.e. not achieving CMO guidelines) unless effective action is taken to provide appropriate opportunities for older adults in London.



All Londoners % Active in 2025 by Age





CHANGES IN NUMBERS OF BOTH 'ACTIVE' AND 'INSUFFICIENTLY ACTIVE' PEOPLE WILL CREATE NEW CHALLENGES *continued*

Combining activity data with population projections for London overall shows, from 2025 to 2035:

400k

More people living in London. **Creating housing for additional residents may conflict with protecting spaces for Sport & Physical Activities.**

334k

Additional active adults. **Where will they be active? Facility types / scheduling may need to adapt to more adults / fewer Children & Young People.**

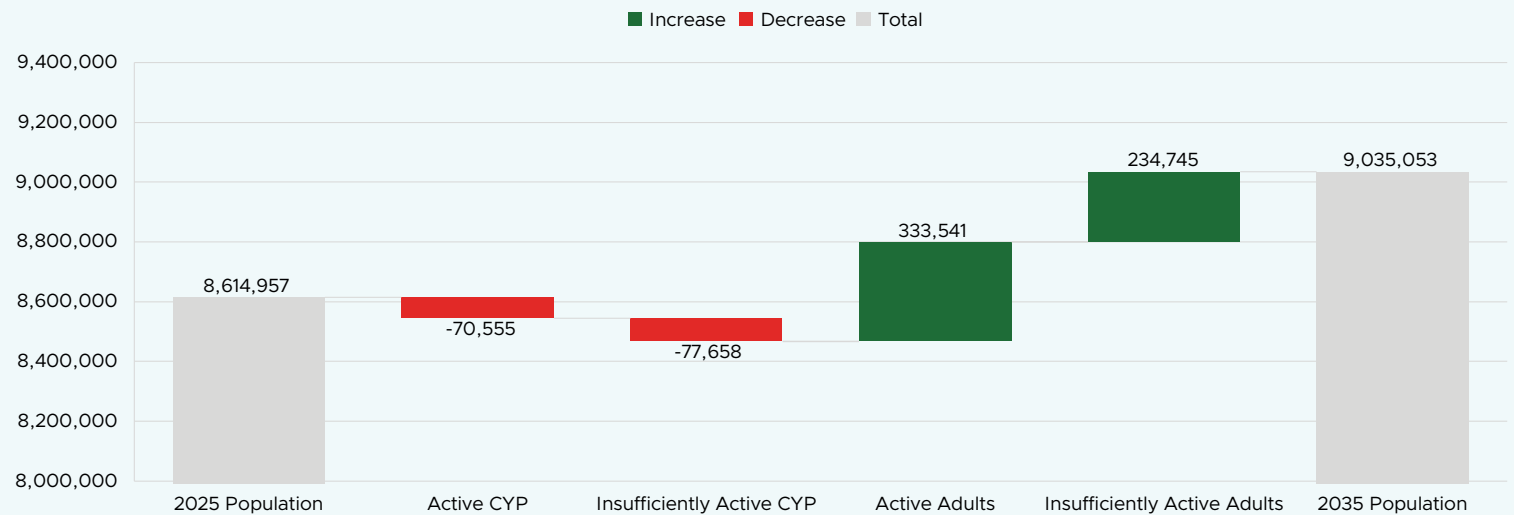
148k

Fewer Children & Young People. **What will happen to the facilities they currently use (e.g. school facilities)?**

235k

Additional insufficiently active adults. **The challenge of increasing activity in this group will require increased investment to cover nearly a quarter of a million additional people.**

Projection of number of 'Active' and insufficiently active people in London 2025 to 2035

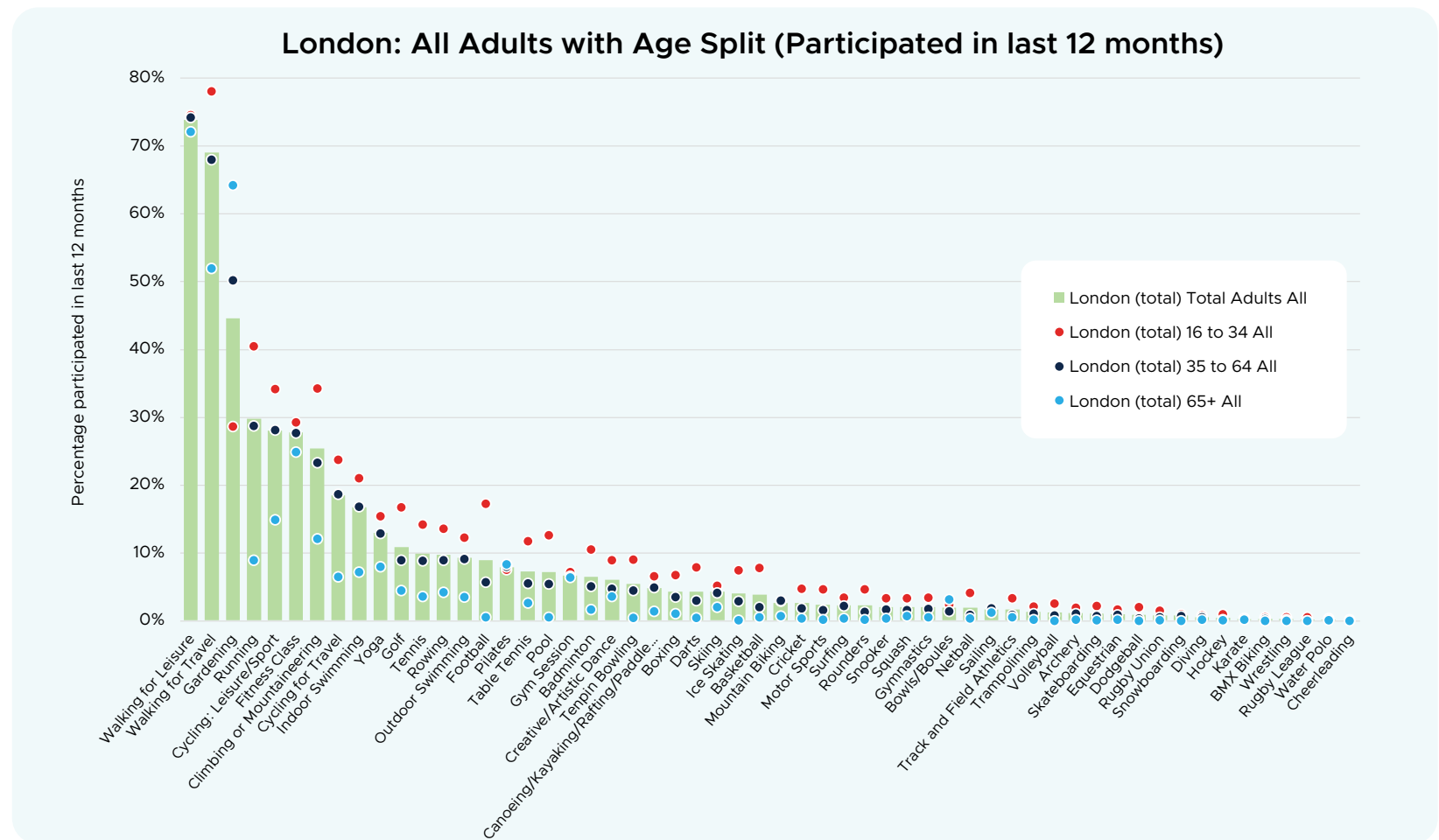


figures exclude Londoners aged 0 to 4 (pre-school)



AN OLDER POPULATION WILL REQUIRE A SHIFT IN FACILITIES, PROGRAMMES AND COACHES

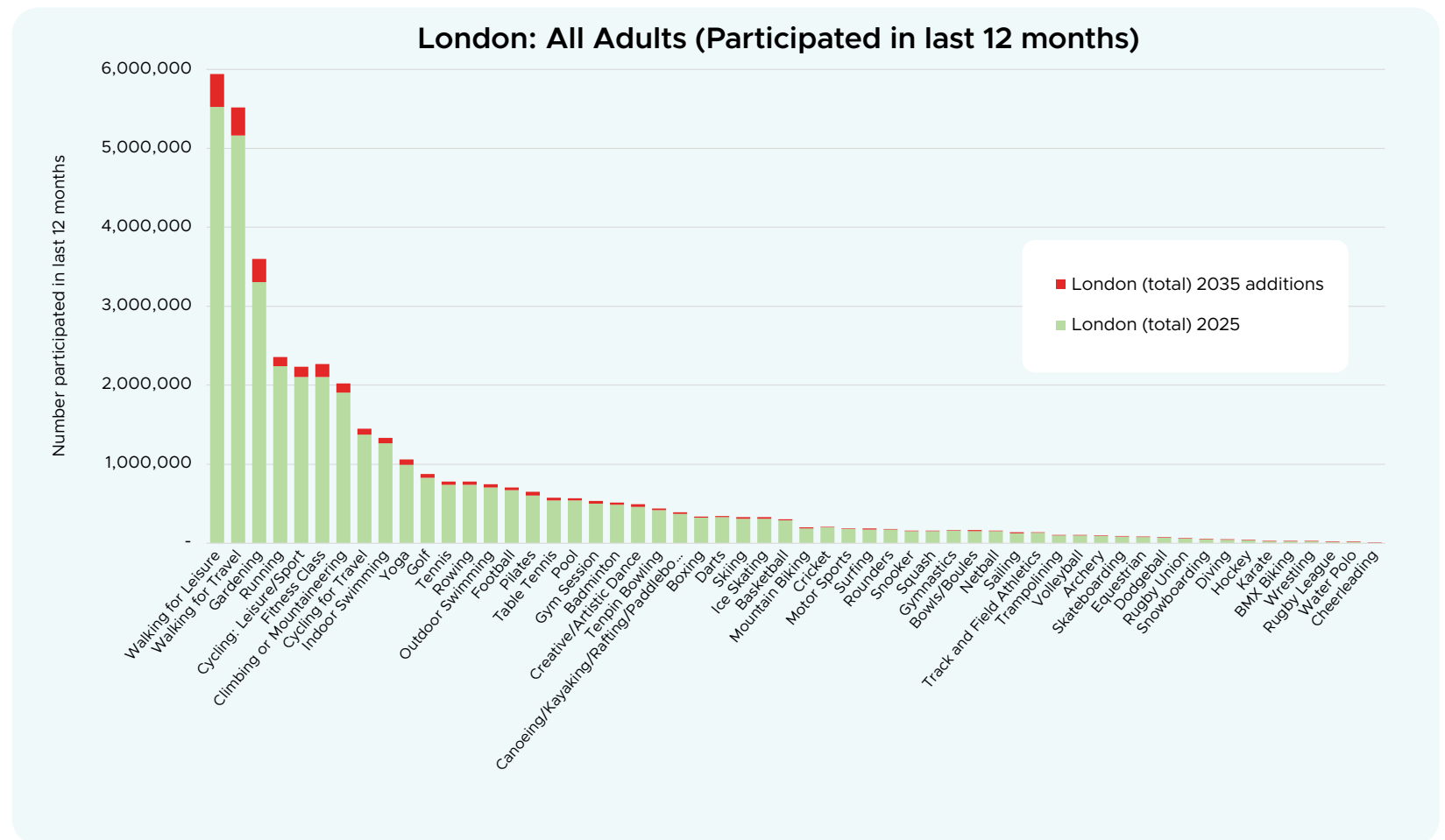
- The most common activities to have been undertaken by adult Londoners are Walking for Leisure (74% in the last 12 months), Walking for Travel (69%), Gardening (45%), Running (30%), Cycling for Leisure (28%).
- The coloured dots show there are large differences in participation by Age for certain activities.
- For example, Football skews strongly toward younger adults, Pilates skews slightly toward older adults.
- **An ageing population alters the likely demand for specific activities and the related facility types.**





AN OLDER POPULATION WILL ALSO REQUIRE MORE SPACE TO BE ACTIVE IN THE WIDER ENVIRONMENT

- Not all activities require specific Sport & Physical Activities facilities as listed in the Active Places facilities data set.
- **As the activities projected to see the largest increase in participation (see red stacks at top of bars), consideration for making spaces appropriate for Walking, Gardening, Running and Cycling should be embedded in new developments.**
- **Access to garden space is particularly limited in certain areas of London (see Appendix), and this activity will see substantial growth in demand as it is particularly skewed toward older adults.**





THE MIX OF FACILITIES, PROGRAMMES AND COACHES WILL NEED TO SHIFT

- Demand for some activities will disproportionately grow because of the ageing population. The facilities they require will experience the greatest increase in demand.
- Gardening (+295k people), Fitness Class (+159k), Pilates (+49k) and Bowls (+14k) all over-index. **Co-location of health and leisure facilities when growing housing stock for older Londoners could focus on space for these activities.**
- Young adult skewed activities - such as running (+121k) and football (+31k) - will still experience growth in demand, but the growth under-indexes relative to activities more popular with older residents.
- **To meet this change in the mix of demand, we will need more facilities, flexible facilities, programmes and coaches suited to the activities of the older population, and a focus more on health than on performance.**

Fitness Class +159k more participants



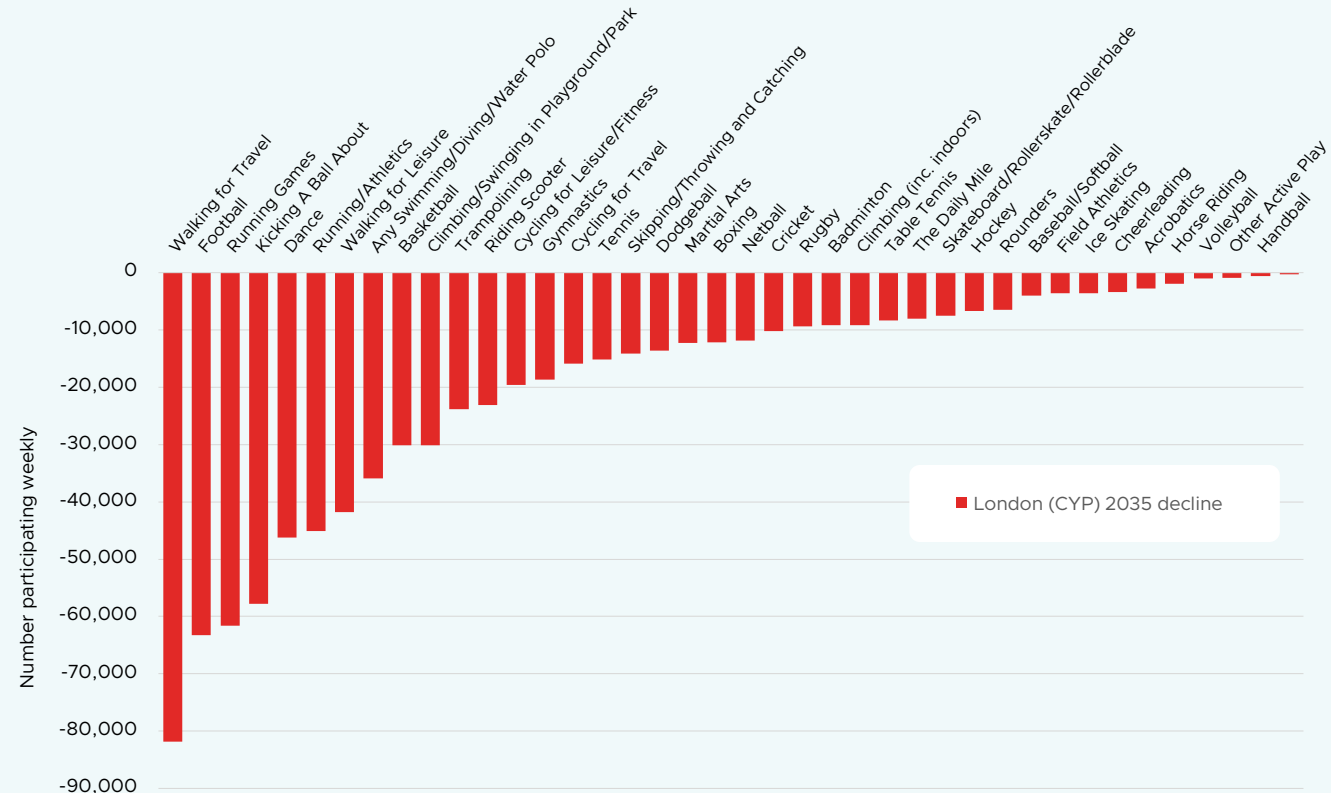


FEWER CHILDREN AND YOUNG PEOPLE COULD RISK THE LOSS OF VALUABLE FACILITIES IF NOT VIEWED IN THE BROADER CONTEXT

- The impact of 148k fewer Children & Young People across London is that all activities will see fewer Children & Young People participants.
- In 2025 there are 496k Children & Young People who play Football. This figure will be 63k fewer by 2035. Dance will be 46k fewer. Swimming 36k fewer.
- The reduction in Children & Young People activity, combined with the increase in Adult activity, creates the overall projection for London.
- If the facilities that had provided capacity to Children & Young People in 2025 are closed due to reduced participant numbers expected by 2035, this will impact the ability to meet increased capacity demands from an increasing number of adults.
- There is potential to re-use former school buildings to create community activity hubs – as has been shown by the Black Prince Trust in Lambeth.

148k fewer CYP reduces all activities

London: CYP (KS1-4) change in number participating weekly (2025 to 2035)



4

IMPACT ON ACTIVITY

BOROUGH LEVEL





EACH BOROUGH WILL FACE A UNIQUE CHANGE IN ACTIVITY LEVELS AND THE MIX OF ACTIVITIES IN DEMAND

London Sport priority boroughs (and Lewisham):

- **Barking & Dagenham** will experience most of their population growth among the older working age adults (35-to-64 YO). They will experience increase in demand by activity roughly in line with the current prominence of that activity. Growth in demand for Fitness Classes and Pilates slightly over-index.
- **Brent** will experience a large increase in the oldest adult cohort (65+). Increase in demand for Walking, Running and Cycling are among the highest because of their prevalence. But Gardening, Fitness Class, Pilates, Gym Sessions and Dance all significantly over-index in increased demand because of the age skew.
- **Enfield** is comparatively well served for facilities among our priority boroughs. There will be a large skew in average age, with significant decline in Children & Young People and growth coming from increased 65+ year old residents. The changes in activity type reflect this ageing.
- **Lambeth** population profile is already heavily skewed toward 25-to-34 YO adults. The highest growth is projected for this age cohort and also those aged 65+. There will be almost no change in the number in the population aged 35-to-64.
- **Newham** will see large growth in all cohorts aged 35+. They will therefore see relatively little increase in demand for those activities that are heavily skewed to the youngest adults, such as Football.

- **Tower Hamlets** will experience increases across all adult groups, with particularly large increases in older working age adults (35-to-64). Activities such as Walking for Leisure and Walking for Travel will both experience in excess of 20k more participants.
- **+ Lewisham**, included because of low provision of Sport & Physical Activities facilities in 2025, will experience growth across all adult age groups – in particular those aged 65+. Gardening, Fitness Classes and Pilates are again seeing increased prominence in the demand for specific activities.

This is a summary of the information used to model the change in facilities needed in each borough to cope with population change.





THIS PAGE DESCRIBES THE BOROUGH LEVEL CHARTS THAT APPEAR ON THE FOLLOWING PAGES

Borough population age profile 2025 and 2035

- Shows age profile for the borough in 2025 and 2035, based on GLA 10yr Central Persons projections

Borough projected additional activity demand (adults)

- Projected activities (over 12 months) of the additional Adults in the population of this borough from 2025 to 2035.
- For additional residents, the likelihood of demand for participation in the individual activity type is based on their Age and Gender cohort but is borough agnostic.

Borough age, sex and whether active waterfall 2025 to 2035

- Bridge modelled using GLA 10yr Central Persons population projections 2025 and 2035 by Age and Sex, combined with % 'Active' in Active Lives and Active Lives Children & Young People.

Borough projected decrease in activity type among children & young people

- Children & Young People in Key Stage 1-to-4 are treated as one Age cohort.
- Modelled based on current participation at borough level and change in overall number of Children & Young People at borough level in GLA projections in 2035.

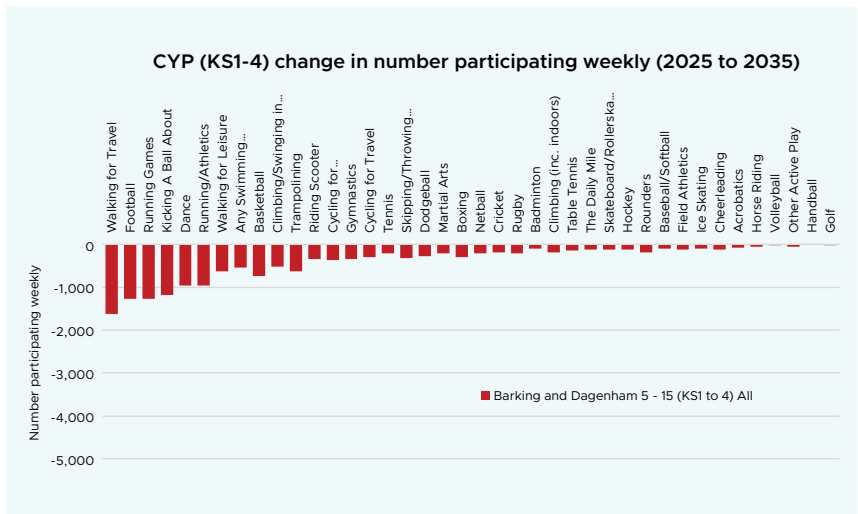
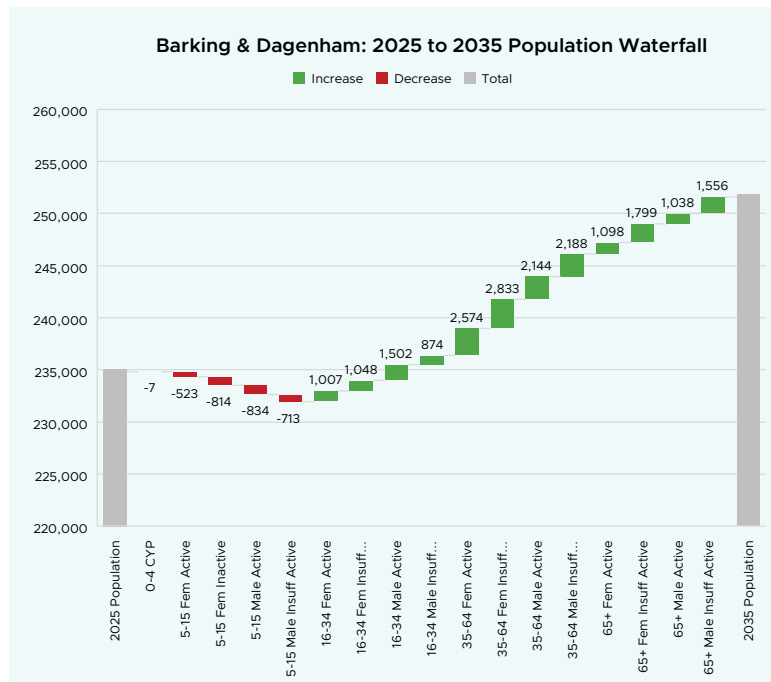
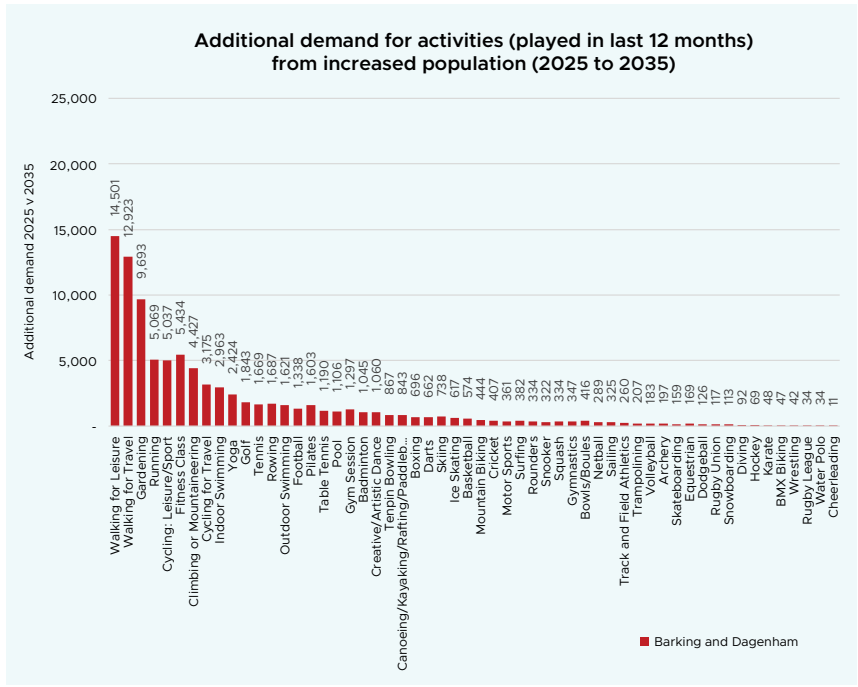
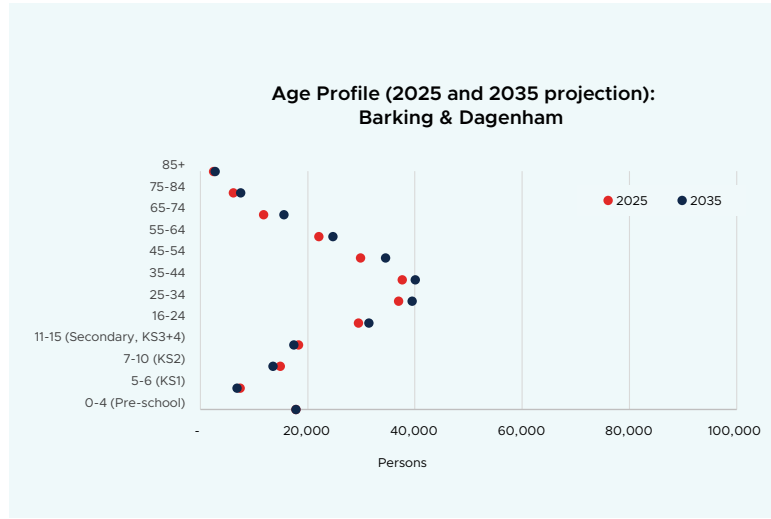


BARKING & DAGENHAM

2025 Pop
234,839

2035 Pop
251,610

% change
7.1%





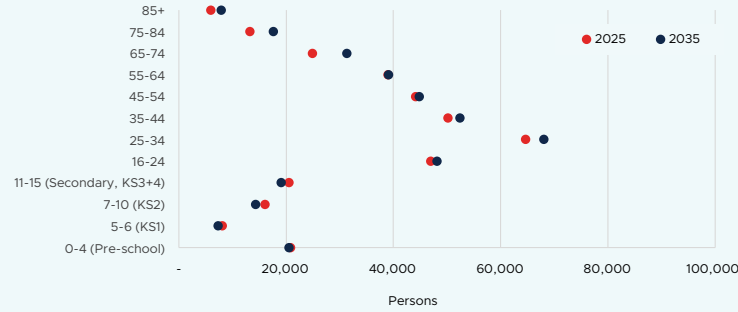
BRENT

2025 Pop
354,543

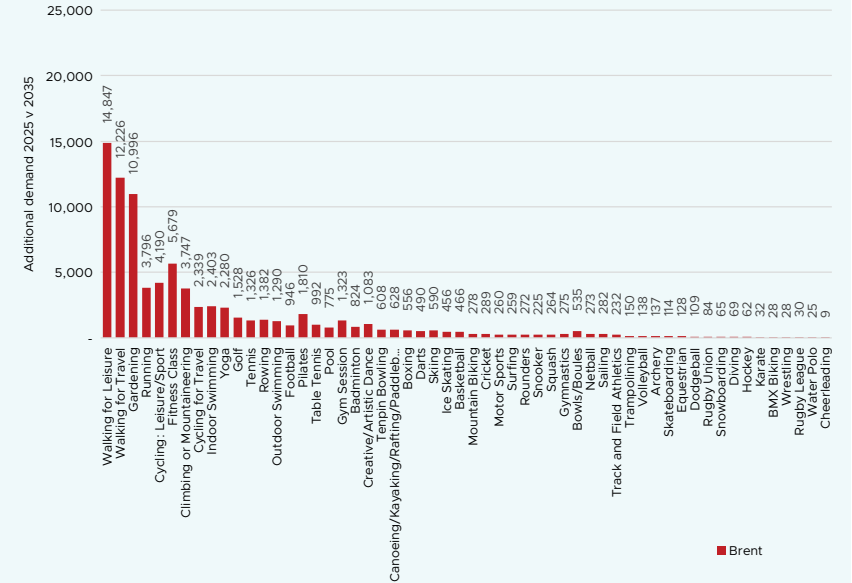
2035 Pop
370,567

% change
4.5%

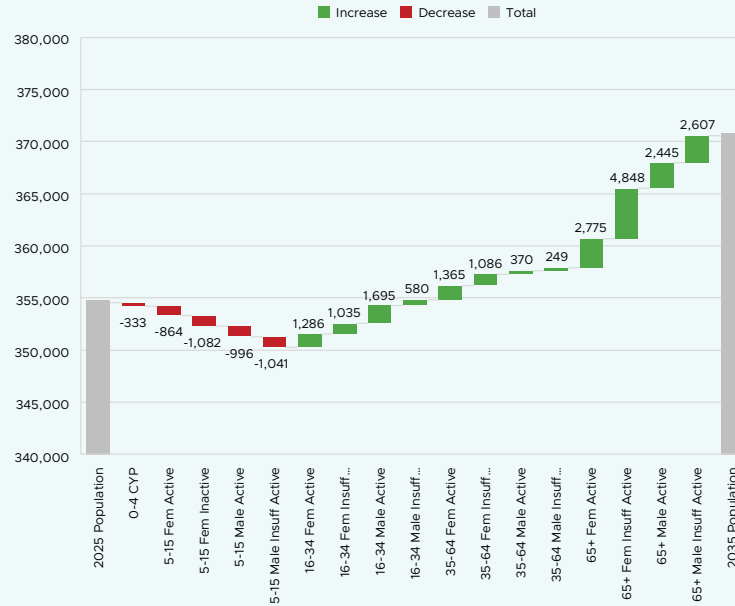
Age Profile (2025 and 2035 projection):
Brent



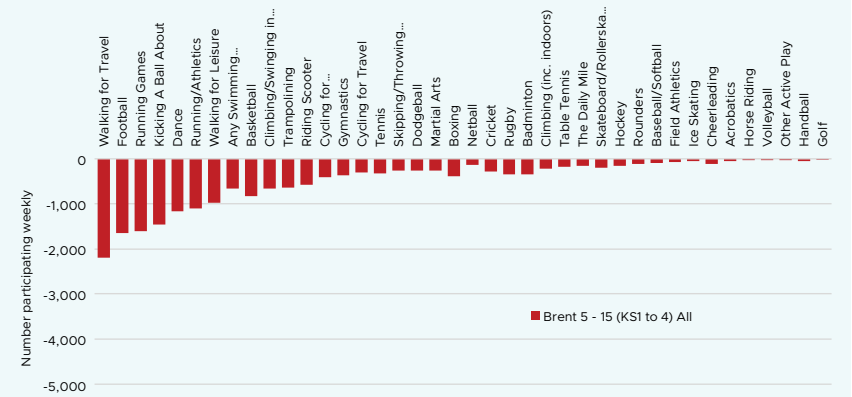
Additional demand for activities (played in last 12 months) from increased population (2025 to 2035)



Brent: 2025 to 2035 Population Waterfall



CYP (KS1-4) change in number participating weekly (2025 to 2035)



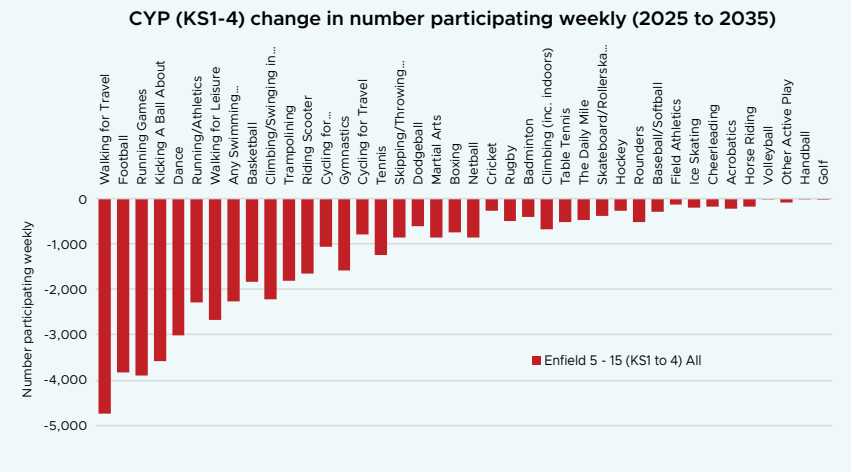
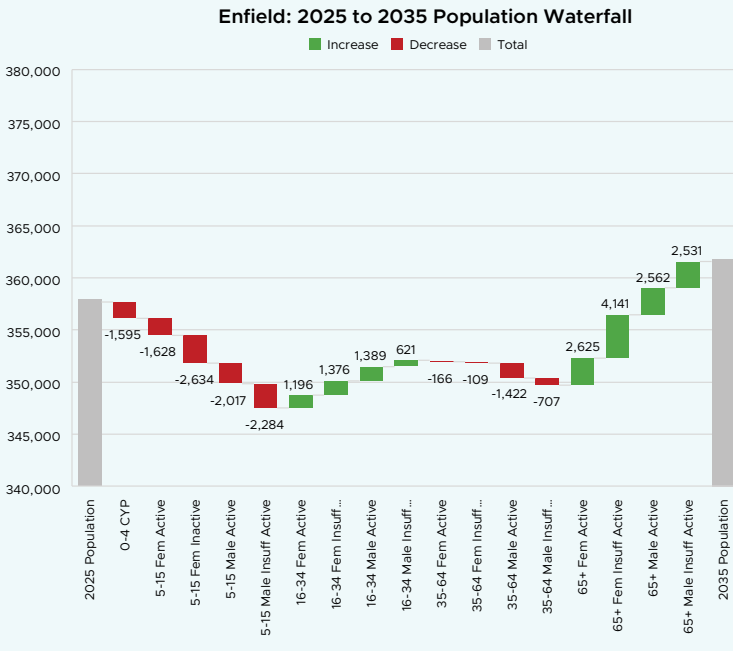
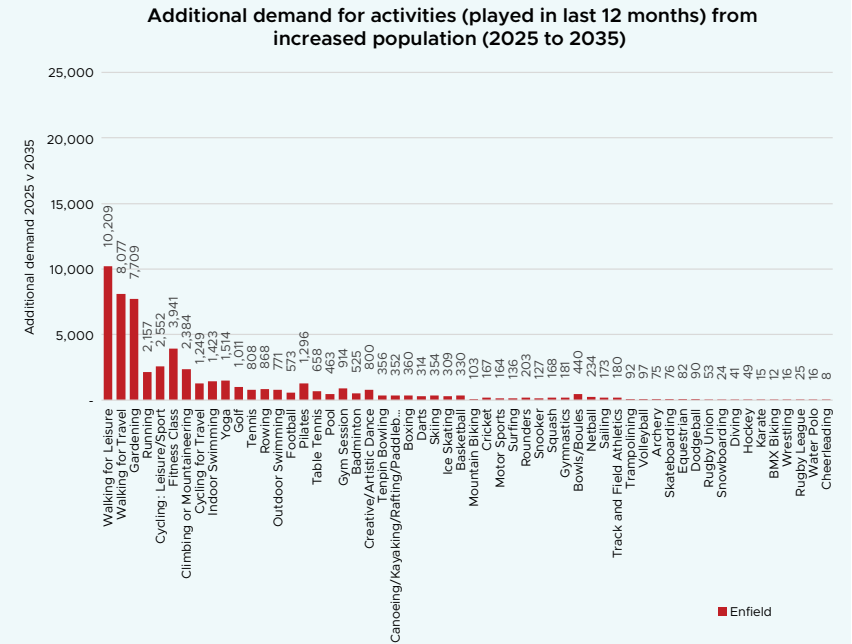
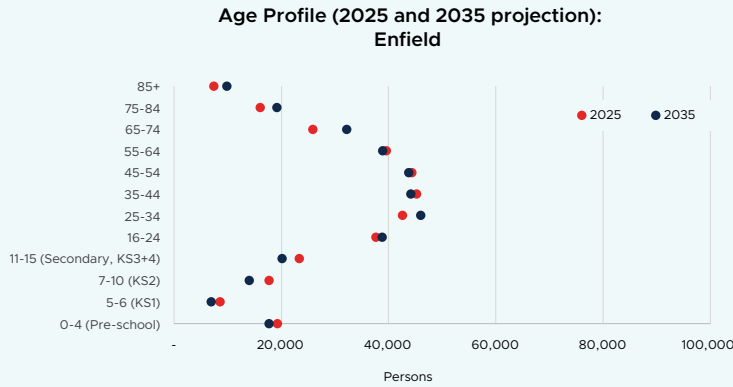


ENFIELD

2025 Pop
327,675

2035 Pop
331,553

% change
1.2%





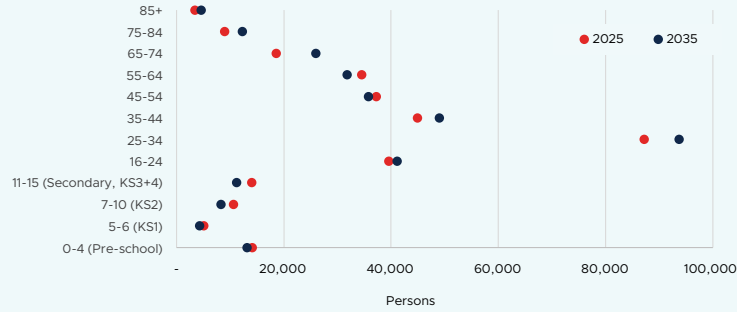
LAMBETH

2025 Pop
318,203

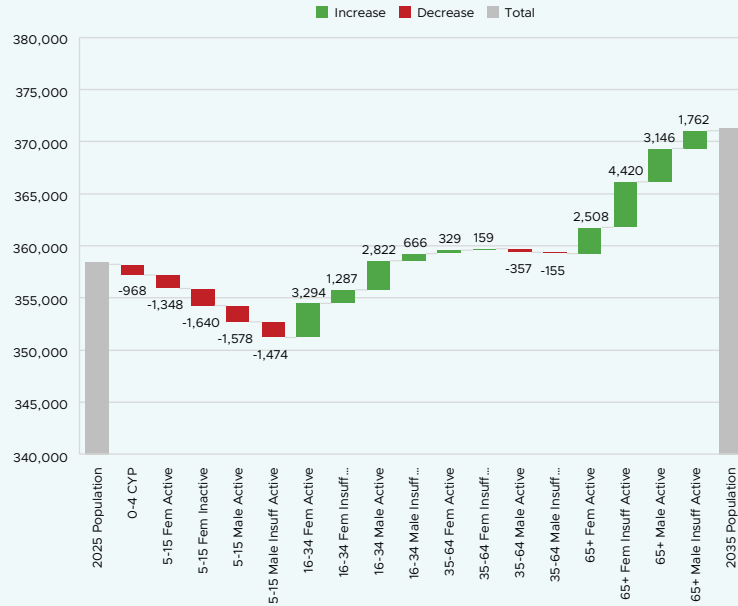
2035 Pop
331,076

% change
4.0%

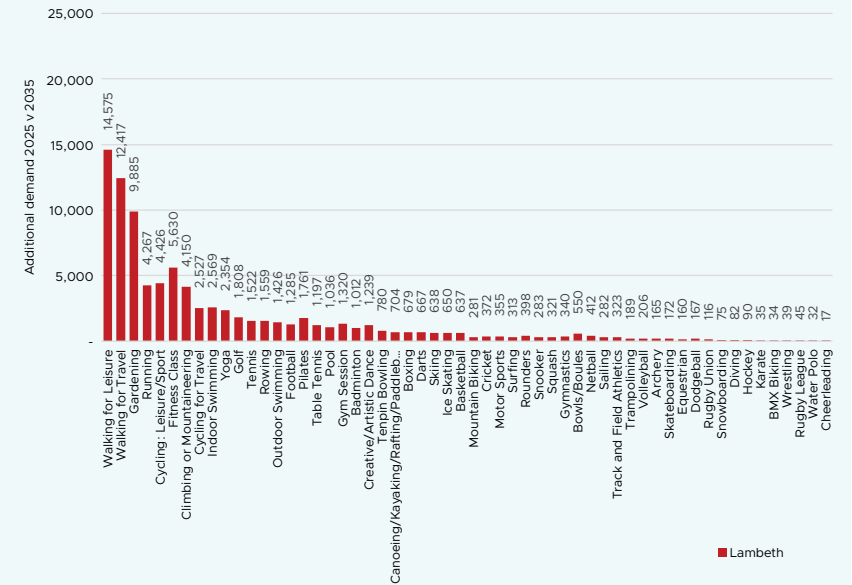
Age Profile (2025 and 2035 projection):
Lambeth



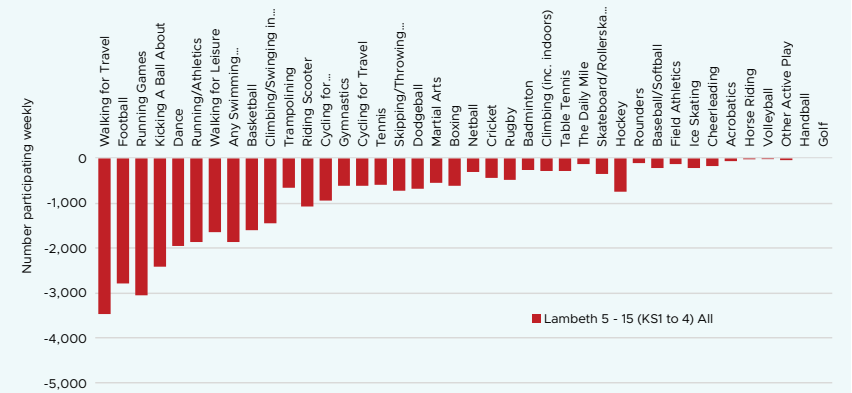
Lambeth: 2025 to 2035 Population Waterfall



Additional demand for activities (played in last 12 months) from increased population (2025 to 2035)



CYP (KS1-4) change in number participating weekly (2025 to 2035)





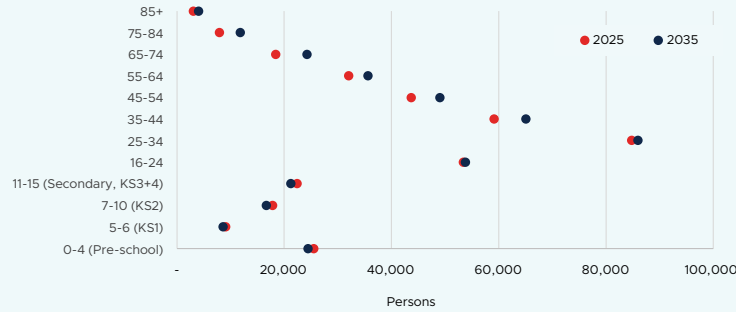
NEWHAM

2025 Pop
376,941

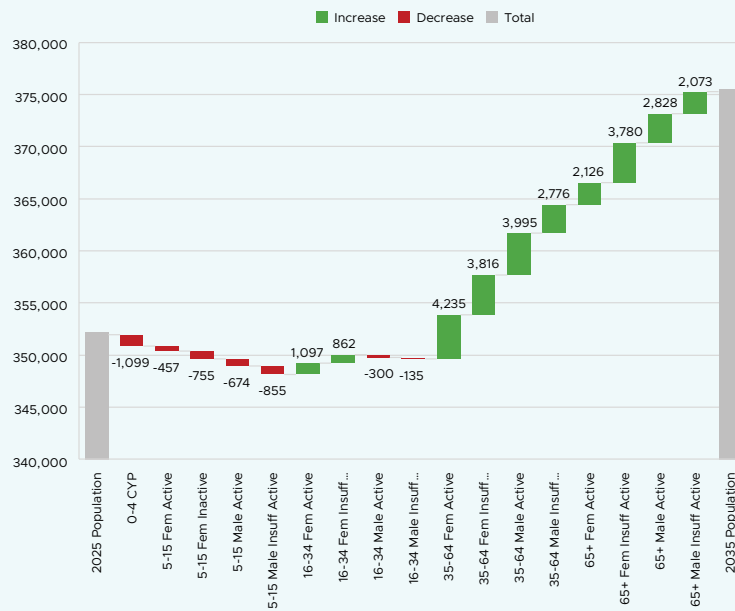
2035 Pop
400,255

% change
6.2%

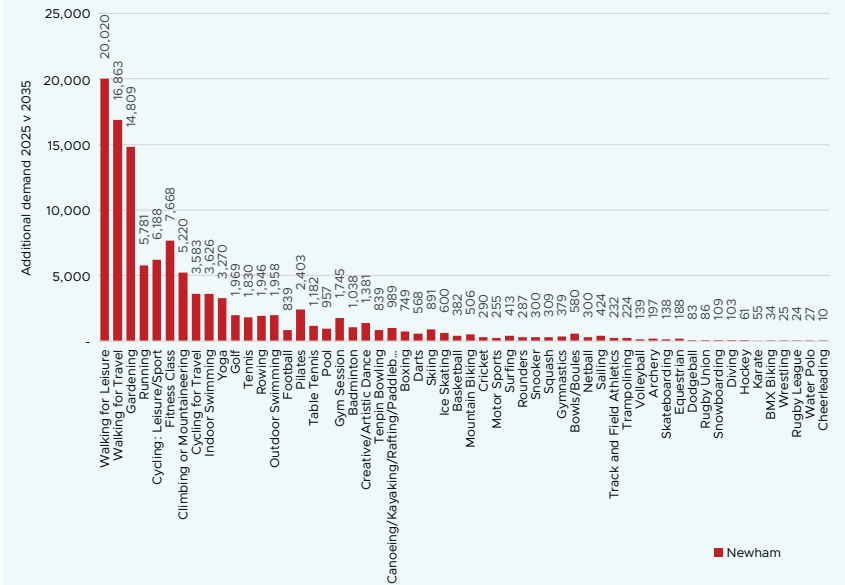
Age Profile (2025 and 2035 projection):
Newham



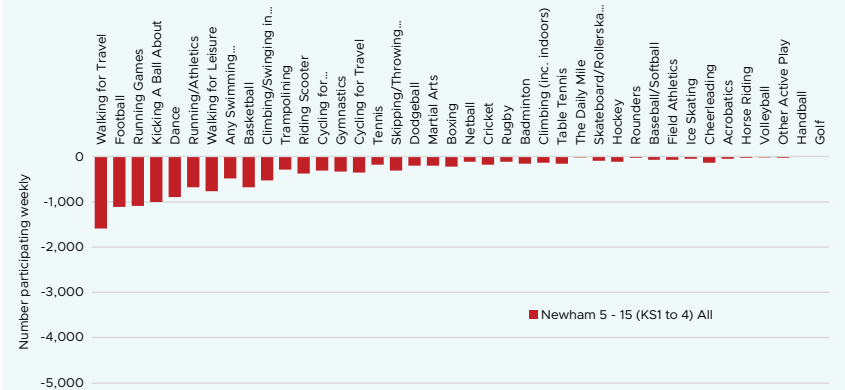
Newham: 2025 to 2035 Population Waterfall



Additional demand for activities (played in last 12 months) from increased population (2025 to 2035)



CYP (KS1-4) change in number participating weekly (2025 to 2035)



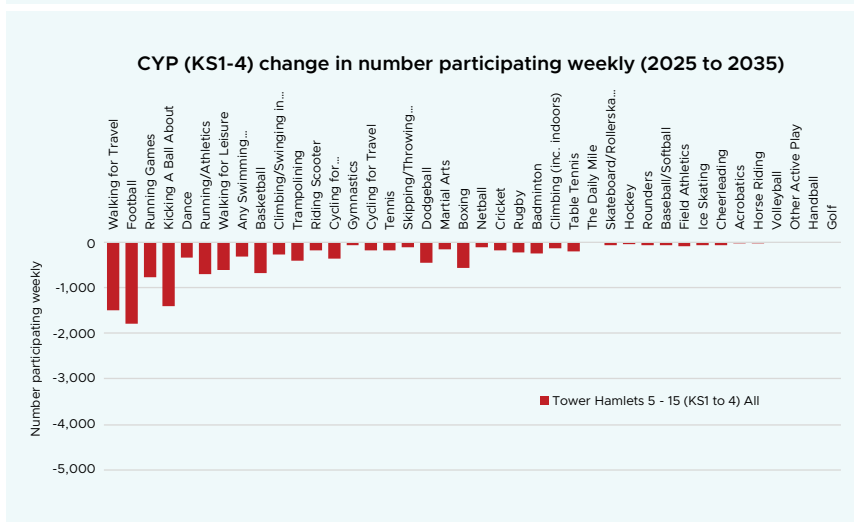
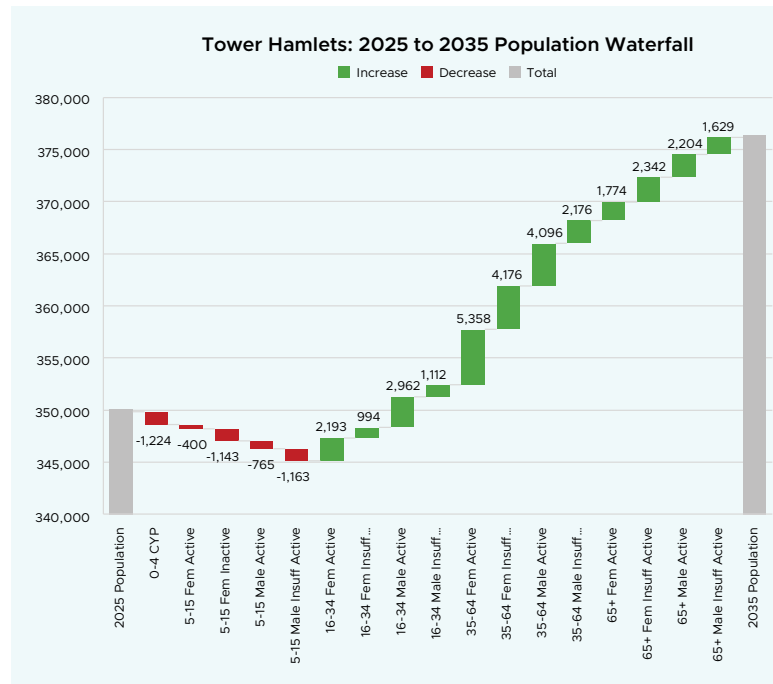
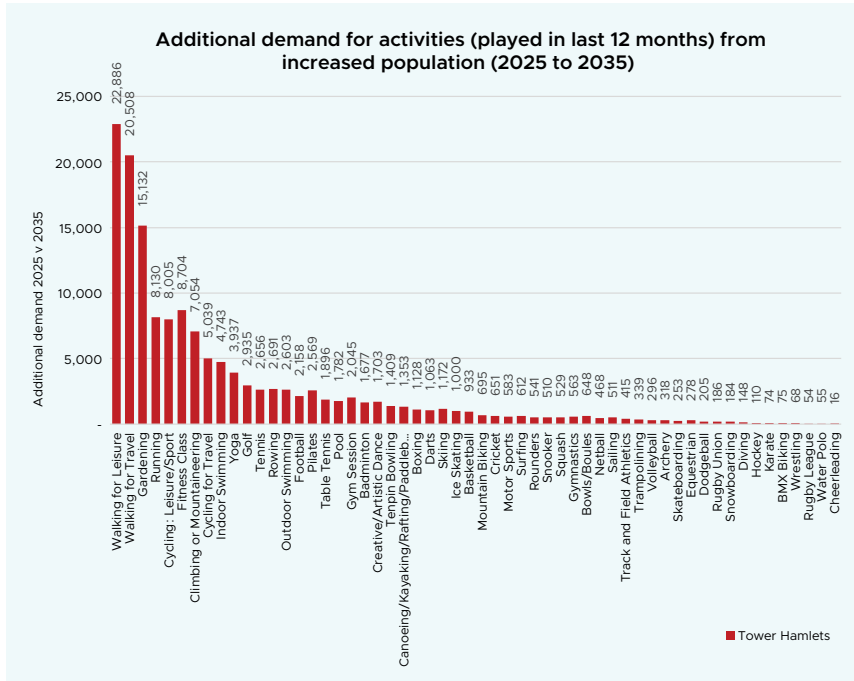
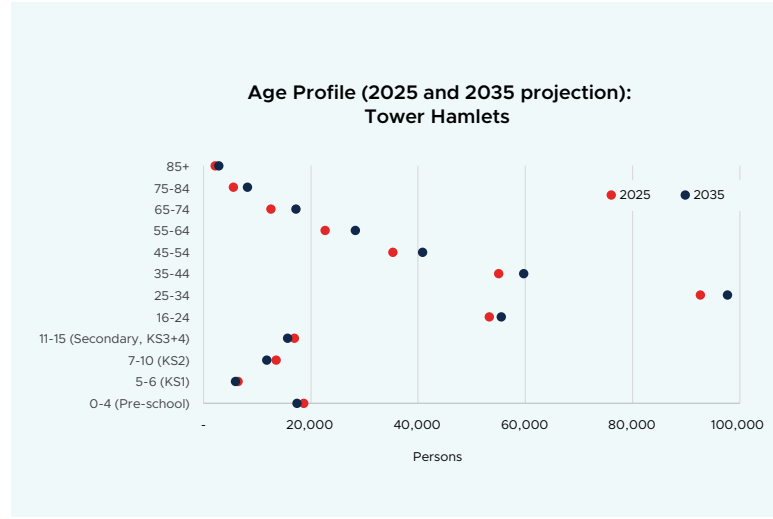


TOWER HAMLETS

2025 Pop
334,832

2035 Pop
361,155

% change
7.9%





FACILITY PROVISION





WITHOUT NEW ADDITIONS, EXISTING FACILITIES WILL BE SHARED BETWEEN HUNDREDS TO THOUSANDS MORE RESIDENTS

- There were 10,620 Sport & Physical Activities facilities (located across 3,602 sites) in London detailed in Active Places in January 2026.
- The most common is Grass Pitches. On average, in 2025 each Grass Pitch facility in London, is shared between 2,389 residents. **If no more Grass Pitch facilities are added by 2035, another 104 residents will be sharing each one.**
- It is a similar story across every type of facility.
- Each Swimming Pool facility is shared by 16,814 residents in 2025. That would rise by over 700 residents to 17,546 in 2035. For Swimming Pools it is sensible to look at number of residents per square-meter of water, to account for vastly differing sizes. This would rise from 107 residents per square meter of water in 2025, to 112 by 2035.
- **These averages are based on an even distribution of facilities across London. But facilities are not evenly distributed.**

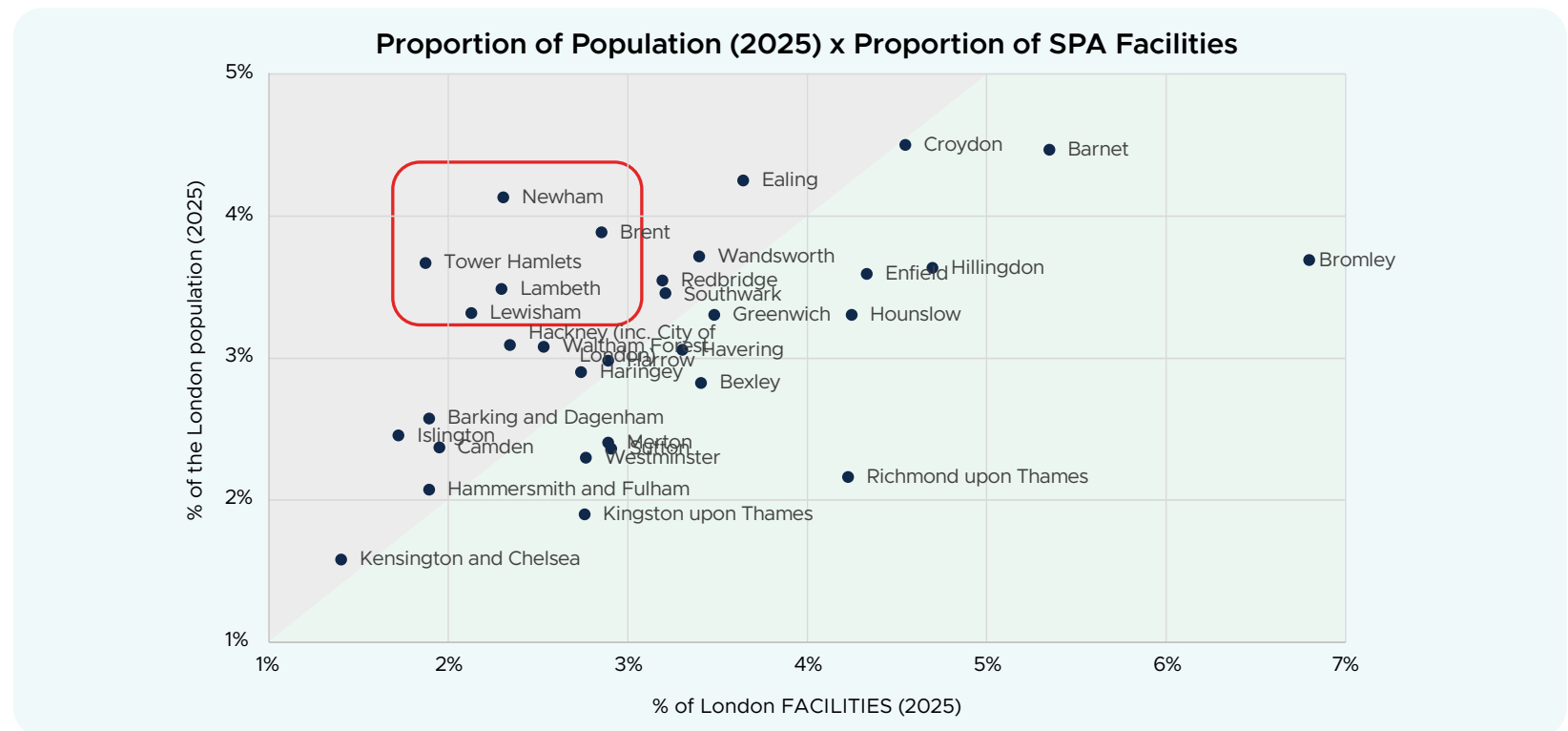
Across London:
 104 more residents per Grass Pitch Facility
 261 more per Sports Hall
 311 more per Studio
 349 more per H&F Gym

	2025	2035	
Grass Pitch Facilities	2,389	2,493	Residents per facility
Sports Hall Facilities	6,019	6,280	
Studio Facilities	7,161	7,472	
Health & Fitness Gym Facilities	8,016	8,365	
Outdoor Tennis Facilities	9,049	9,442	
Artificial Grass Pitch Facilities	10,843	11,315	
Swimming Pool Facilities	16,814	17,546	
Squash Court Facilities	59,286	61,866	
Golf Facilities	64,752	67,570	
Athletics Facilities	147,259	153,667	
Indoor Tennis Facilities	160,177	167,146	
Cycling Facilities	276,669	288,707	
Indoor Bowls Facilities	456,504	476,367	
Ice Rinks	1,521,681	1,587,890	
Grass Pitch Number of Pitches	1,384	1,444	Residents per pitch
Artificial Grass Pitch Number of Pitches	7,919	8,263	
Sports Hall Area	14.6	15.2	Residents per square meter
Swimming Pool Facilities Area	107.4	112.1	
Outdoor Tennis Number of Courts	2,696	2,813	Residents per court
Indoor Tennis Number of Courts	35,804	37,362	



CERTAIN BOROUGHS HAVE FAR FEWER THAN THEIR FAIR SHARE OF FACILITIES

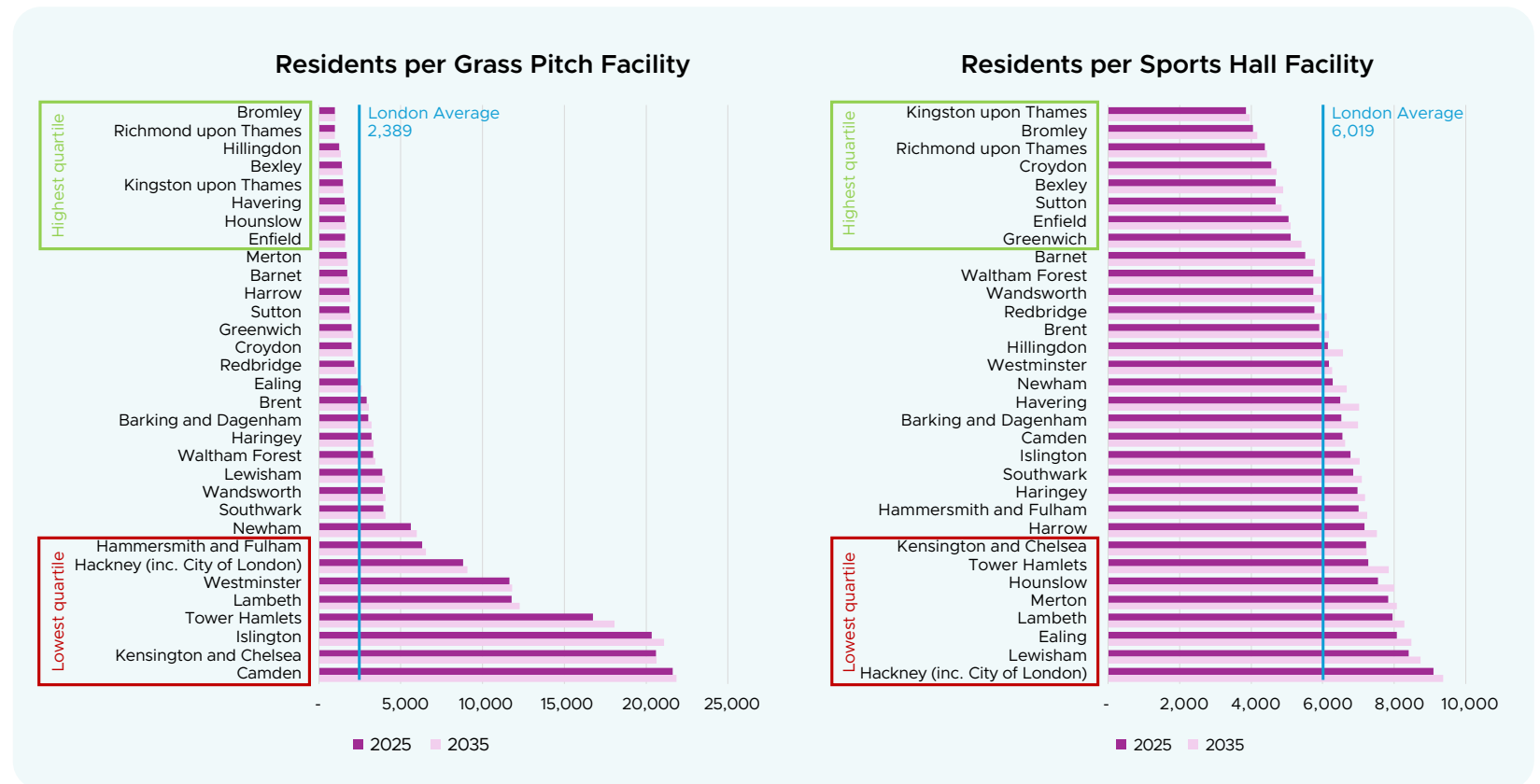
- A plot of % of London Population in 2025 and % of Sport & Physical Activities Facilities in 2025 shows how provision of facilities in a borough does not reflect the number of people who live there.
- For example, Bromley is home to 6.8% of the Sport & Physical Activities facilities in London, but only 3.7% of the London population. They are relatively well served.
- Boroughs who are the most poorly served are:
 - **Newham** (2.3% of facilities, 4.1% of population)
 - **Tower Hamlets** (1.9% facilities, 3.7% population)
 - **Brent** (2.9% facilities, 3.9% population)
 - **Lambeth** (2.3% facilities, 3.5% population)
 - **Lewisham** (2.1% facilities, 3.3% population).
- **The increase in demand for facilities due to population change in these boroughs (some of whom are expecting the largest increases of London boroughs – Newham above 6%, Tower Hamlets close to 8%) will only compound an existing shortfall for their residents and further reduce activity levels.**





THERE IS SOME VARIATION IN WHICH BOROUGHS ARE UNDERSERVED WHEN LOOKING AT SPECIFIC FACILITIES, BUT A FAMILIAR OVERALL PICTURE EMERGES

- Grass Pitches and Sports Halls are the most common facility types across London. Grass Pitches are a good example of uneven provision – where provision in Central London is massively different to other boroughs.



- The output from ranking charts such as this for each facility type (see appendix) can be combined to give an overview of provision by borough.



THERE IS SOME VARIATION IN WHICH BOROUGHS ARE UNDERSERVED WHEN LOOKING AT SPECIFIC FACILITIES, BUT A FAMILIAR OVERALL PICTURE EMERGES *continued*

- This chart shows a ranking of provision of each facility (and also courts, pitches, square meters) by resident for each borough in 2025. 1 = fewest residents per facility (best), 32 = most residents per facility (worst).
- 'Weighted Rank' is an average of all facilities weighted by the number of facilities in the column (grey columns excluded to avoid double counting).

Richmond-upon-Thames, Bromley and Kingston-upon-Thames rank best

Brent, Barking & Dagenham, Lewisham, Tower Hamlets and Newham rank worst

2025	Grass Pitch Facilities	Grass Pitch Number of Pitches	Sports Hall Facilities	Sports Hall Area	Studio Facilities	Health & Fitness Gym Facilities	Outdoor Tennis Facilities	Outdoor Tennis Number of Courts	Artificial Grass Pitch Facilities	Artificial Grass Pitch Number of Pitches	Swimming Pool Facilities	Swimming Pool Facilities Area	Squash Court Facilities	Golf Facilities	Athletic Facilities	Indoor Tennis Facilities	Indoor Tennis Number of Courts	Cycling Facilities	Indoor Bowls Facilities	Ice Rinks	Weighted rank
Richmond upon Thames	2	1	3	2	3	10	1	1	3	4	2	5	3	1	4	32	32	7	1	32	1
Bromley	1	2	2	3	9	17	2	3	5	11	6	2	2	2	9	3	5	18	14	32	2
Kingston upon Thames	5	3	1	1	13	7	3	6	17	7	7	27	9	8	19	4	15	32	4	32	3
Hounslow	7	5	27	20	10	14	9	11	1	1	10	12	16	7	5	7	4	32	11	32	4
Sutton	12	13	6	4	15	12	4	5	23	8	14	18	5	4	1	9	6	32	7	32	5
Barnet	10	10	9	13	16	20	6	9	10	3	11	14	19	5	22	12	7	32	16	32	6
Enfield	8	6	7	8	20	16	8	7	11	14	25	19	22	10	8	8	8	32	3	32	7
Bexley	4	8	5	7	23	22	16	18	16	19	26	29	23	15	27	10	19	10	32	32	8
Hillingdon	3	4	14	14	26	21	19	14	6	2	19	9	18	11	3	13	9	2	32	32	9
Merton	9	9	28	29	18	18	5	2	15	9	9	11	7	9	25	1	1	8	32	32	10
Greenwich	13	14	8	23	24	19	13	15	12	15	18	22	15	17	2	32	32	15	32	32	11
Wandsworth	22	19	11	18	11	9	18	8	8	20	12	16	13	22	10	14	12	19	32	32	12
Haringey	19	22	22	16	14	11	7	10	9	5	21	28	10	18	12	11	16	11	32	3	13
Havering	6	7	17	22	22	26	21	19	32	31	16	13	28	3	14	18	13	13	10	4	14
Westminster	27	25	15	9	1	1	25	25	19	26	1	1	1	32	6	16	18	32	6	2	15
Southwark	23	20	21	12	6	8	23	22	4	13	13	8	21	20	7	32	32	5	32	32	16
Croydon	14	15	4	6	31	25	10	16	30	32	20	15	27	6	23	32	32	21	5	32	17
Hammersmith and Fulham	25	26	23	32	7	3	15	4	26	18	4	3	4	32	20	2	2	6	32	32	18
Waltham Forest	20	18	10	5	19	24	27	26	7	10	23	26	20	19	28	5	10	4	32	1	19
Harrow	11	12	24	25	29	28	11	12	20	17	29	20	24	13	13	32	32	12	9	32	20
Kensington and Chelsea	31	31	25	27	2	6	12	23	14	12	5	4	12	32	32	6	3	32	32	32	21
Camden	32	30	19	21	4	2	17	20	21	28	3	10	6	32	24	32	32	32	32	32	22
Islington	30	32	20	19	8	4	32	31	2	6	15	6	11	32	32	17	11	32	32	32	23
Redbridge	15	11	12	15	28	31	20	17	27	23	32	30	14	12	17	19	14	3	13	32	24
Ealing	16	17	30	31	21	23	14	13	24	29	22	25	29	16	21	15	17	32	32	32	25
Hackney (inc. City of London)	26	24	32	24	5	5	28	28	22	22	8	7	8	32	15	32	32	14	32	32	26
Lambeth	28	28	29	26	12	13	22	21	13	21	17	23	17	32	16	32	32	17	12	5	27
Brent	17	21	13	17	32	30	24	24	28	24	28	32	26	21	30	32	32	20	15	32	28
Barking and Dagenham	18	16	18	10	27	32	30	30	18	16	27	21	32	14	26	32	32	9	8	32	29
Lewisham	21	23	31	30	25	27	26	29	25	27	30	31	32	32	29	32	32	16	2	32	30
Tower Hamlets	29	29	26	28	17	15	31	32	29	25	24	24	25	32	18	32	32	32	32	32	31
Newham	24	27	16	11	30	29	29	27	31	30	31	17	32	32	11	32	32	1	32	32	32



THERE IS SOME VARIATION IN WHICH BOROUGHS ARE UNDERSERVED WHEN LOOKING AT SPECIFIC FACILITIES, BUT A FAMILIAR OVERALL PICTURE EMERGES *continued*

- Inner London boroughs are most often the most underserved in terms of overall Sport & Physical Activities facilities per resident.
- Some of the London Sport priority boroughs - Newham, Tower Hamlets, Barking & Dagenham, Brent and Lambeth (along with Lewisham) - are the lowest ranked boroughs.
- The figures show that inequalities of provision are not entirely consistent. Even boroughs who are well served overall might have relatively few facilities of a specific type. And visa-versa, poorly served boroughs might have good provision of a few specific facility types.

Tower Hamlets, Barking & Dagenham, Newham also experiencing among largest population growth

Weighted Borough Rankings for Facilities per Resident





THERE IS SOME VARIATION IN WHICH BOROUGHS ARE UNDERSERVED WHEN LOOKING AT SPECIFIC FACILITIES, BUT A FAMILIAR OVERALL PICTURE EMERGES *continued*

Those boroughs who are most poorly served:

- **Lambeth.** Low provision for Grass Pitches and Sports Halls, but appears in the third quartile due to average provision of many other facility types.
- **Brent.** Average number of Sports Hall and Indoor Bowling facilities, but otherwise consistently underserved.
- **Barking & Dagenham.** Underserved in most facilities. Gyms, Tennis and Swimming facilities are particularly low.
- **Lewisham.** Underserved for all the most common facility types.
- **Tower Hamlets.** Average number of Studios and Health & Fitness Gym facilities, but otherwise consistently underserved.
- **Newham.** The lowest ranked borough in London. Home to the 2012 Olympic Park site, it has large Swimming facility, relatively good Athletics provision, and the most Cycling facilities in London. For these facility types, the Olympic Park could be masking the lack of smaller, more locally accessible, facilities for every-day use. Most other facility types also rank among the lowest provision in London.



6

IMPACT ON FACILITIES





TO MAINTAIN CURRENT PROVISION LONDON NEEDS 70+ MORE GYMS, 60+ MORE SPORTS HALLS, 50+ MORE STUDIOS...

Additional facilities required by 2035 to maintain 2025 provision Children & Young People and Adults combined	Artificial Grass Pitch	Athletics	Golf	Grass Pitches	Health and Fitness Gym	Indoor Bowls	Indoor Tennis Centre	Outdoor Tennis Courts	Sports Hall	Squash Courts	Studio	Swimming Pool (25x8m)
Barking and Dagenham	0.8	0.1	0.5	1.5	2.1	0.1	-0.0	0.5	3.0	-	2.5	1.3
Barnet	0.8	0.2	0.6	2.0	3.2	0.1	0.1	1.1	3.3	0.3	2.2	0.7
Bexley	0.6	0.0	0.2	2.2	2.1	-	-0.0	0.7	2.9	0.3	1.5	0.5
Brent	0.4	0.1	0.1	0.9	2.0	0.2	-	0.4	2.5	0.1	1.2	0.6
Bromley	0.8	0.1	0.2	3.3	2.2	0.1	0.3	0.9	3.2	0.6	2.3	0.5
Camden	0.1	0.0	-	-0.0	1.4	-	-	0.1	0.5	0.3	0.4	-0.2
Croydon	0.0	0.1	0.2	0.3	2.2	0.2	-	0.8	3.3	0.1	1.2	0.4
Ealing	0.3	0.0	0.1	0.7	2.4	-	0.1	0.6	2.0	0.1	2.1	0.6
Enfield	-0.3	0.1	0.0	-1.7	1.6	0.2	0.1	0.3	1.6	0.1	0.9	0.0
Greenwich	0.9	0.2	0.2	2.4	3.4	-	-	1.0	4.0	0.5	2.1	1.0
Hackney (inc. City of London)	-0.2	0.0	-	-0.2	2.0	-	-	0.1	0.6	0.1	1.0	0.1
Hammersmith and Fulham	0.3	0.0	-	0.3	1.2	-	0.2	0.2	0.8	0.2	1.0	0.2
Haringey	0.4	0.1	0.1	0.7	2.8	-	0.1	0.5	1.3	0.3	1.1	0.2
Harrow	0.6	0.1	0.2	1.2	1.6	0.2	-	0.6	1.6	0.1	1.2	0.6
Havering	1.0	0.4	0.7	7.4	2.7	0.1	0.1	1.2	4.2	0.1	3.1	1.5
Hillingdon	1.4	0.3	0.4	4.5	2.7	-	0.2	0.9	3.5	0.4	2.5	1.7
Hounslow	2.0	0.5	1.0	3.6	4.8	0.1	0.3	1.4	2.9	0.5	4.5	1.5
Islington	0.7	-	-	0.1	1.9	-	0.0	0.1	1.0	0.1	1.1	0.3
Kensington and Chelsea	-0.1	-	-	-0.0	0.4	-	0.0	-0.0	0.1	0.0	-0.0	-0.2
Kingston upon Thames	0.2	0.0	0.0	1.0	1.3	0.0	0.1	0.5	1.5	0.1	0.8	0.1
Lambeth	0.9	0.0	-	0.4	2.1	0.1	-0.1	0.5	1.3	0.1	1.1	0.2
Lewisham	0.2	0.1	-	0.5	2.0	0.2	-0.1	0.4	1.4	-	0.9	0.2
Merton	0.5	0.0	0.1	0.9	1.3	-	0.2	0.5	1.1	0.2	0.8	0.2
Newham	0.3	0.2	-	0.4	3.0	-	-	0.4	3.8	-	2.4	1.4
Redbridge	0.6	0.1	0.4	1.8	2.4	0.2	0.1	0.8	3.0	0.5	1.9	0.6
Richmond upon Thames	-0.1	0.0	-0.2	-1.4	1.2	0.2	-	0.1	0.7	0.2	0.2	-0.3
Southwark	0.8	0.1	0.1	0.7	3.2	-	-	0.4	1.5	0.2	1.8	0.2
Sutton	0.4	0.1	0.3	1.8	1.9	0.1	0.1	1.0	2.2	0.5	1.4	0.3
Tower Hamlets	1.1	0.1	-	0.7	3.9	-	-	0.5	3.4	0.2	2.8	1.0
Waltham Forest	0.9	0.1	0.1	0.9	2.0	-	0.2	0.4	2.5	0.2	1.8	0.5
Wandsworth	0.5	0.0	0.0	0.4	2.4	-	0.0	0.3	1.7	0.2	1.5	0.5
Westminster	0.2	0.0	-	0.1	1.6	0.1	0.0	0.1	0.5	0.2	0.9	0.1
London	16	2	4	33	71	2	2	17	63	7	53	18

- Using the projected change in population to show change in demand for certain activities, and mapping that change in activity to a need for facilities show us that, to maintain provision, London needs:
 - +71 Health & Fitness Gym facilities (equivalent to +6%)
 - +63 Sports Hall facilities (+4%)
 - +53 Studios (+4%)
 - Plus... 33 Grass Pitch facilities (+1%), +27 Outdoor Tennis Court facilities (+2%), +16 Artificial Grass Pitch facilities (+2%), and +18 more 25-by-8 meter Swimming Pools (+4%)
- This reflects that a large proportion of the additional demand is generated by older adults (aged 65+) who will require facilities such as Health & Fitness Gyms, Sports Halls and Studios to accommodate Fitness Classes, Pilates, Yoga and Dance.



PRIORITISE BUILDING CAPACITY IN THE BOROUGH'S WHO ARE ALREADY THE MOST UNDERSERVED

Maintaining provision in underserved boroughs is a priority. To do so would mean prioritising additional H&F Gym provision in the following way:

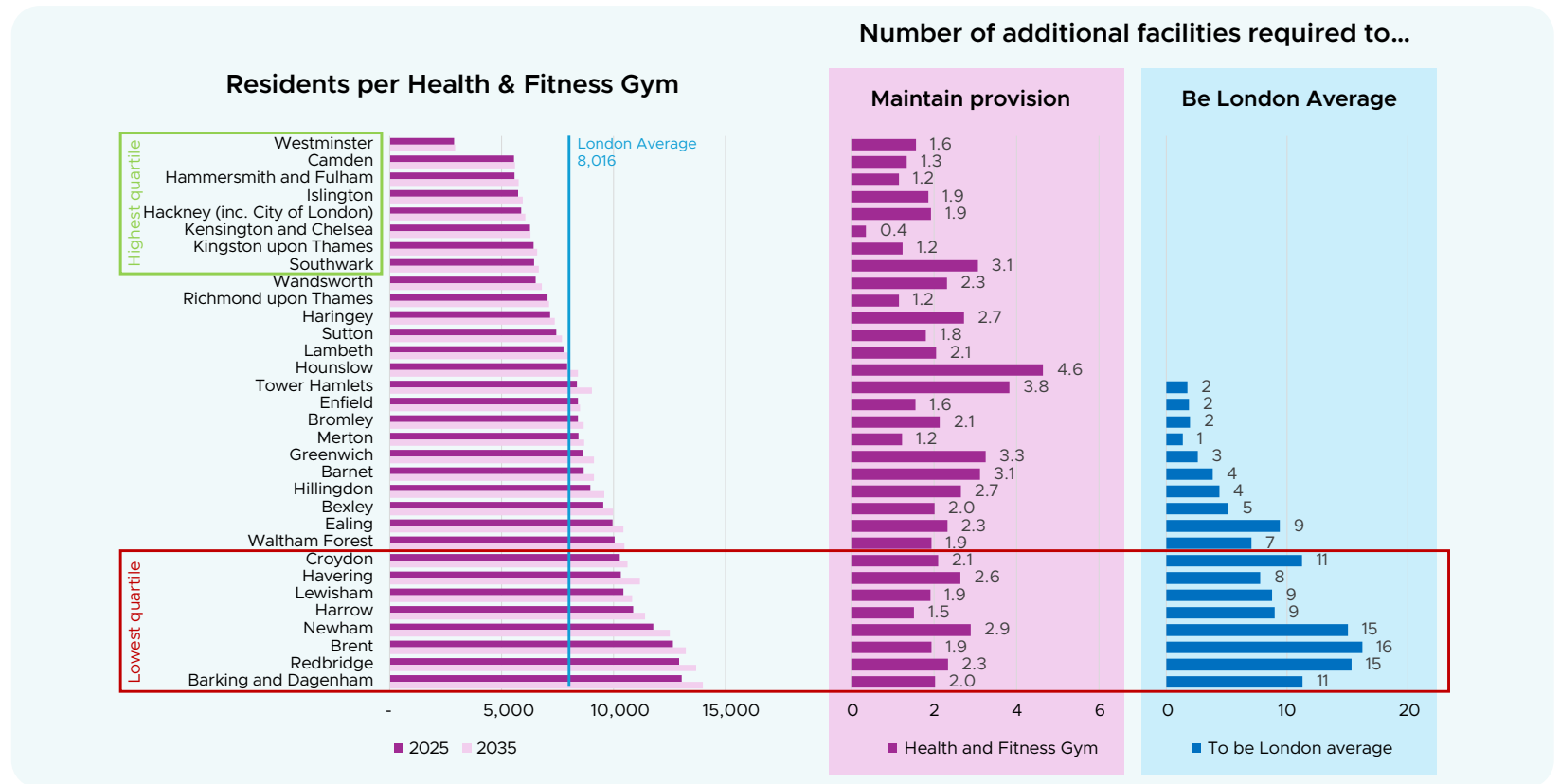
- 2.0 in B&D
- 2.3 in Redbridge
- 1.9 in Brent
- 2.9 in Newham

- 1.5 in Harrow
- 1.9 in Lewisham
- 2.6 in Havering
- 2.1 in Croydon

London could go beyond maintaining provision, and seek to level up provision. Moving all underserved boroughs to the current London Average would require 134 additional Health & Fitness Gym Facilities.

71 more H&F Gym facilities to maintain provision across London

134 more H&F Gym facilities to move underserved boroughs to be London average





PRIORITISE BUILDING CAPACITY IN THE BOROUGHES WHO ARE ALREADY THE MOST UNDERSERVED *continued*

To maintain Sports Hall facility provision in the most underserved boroughs would require:

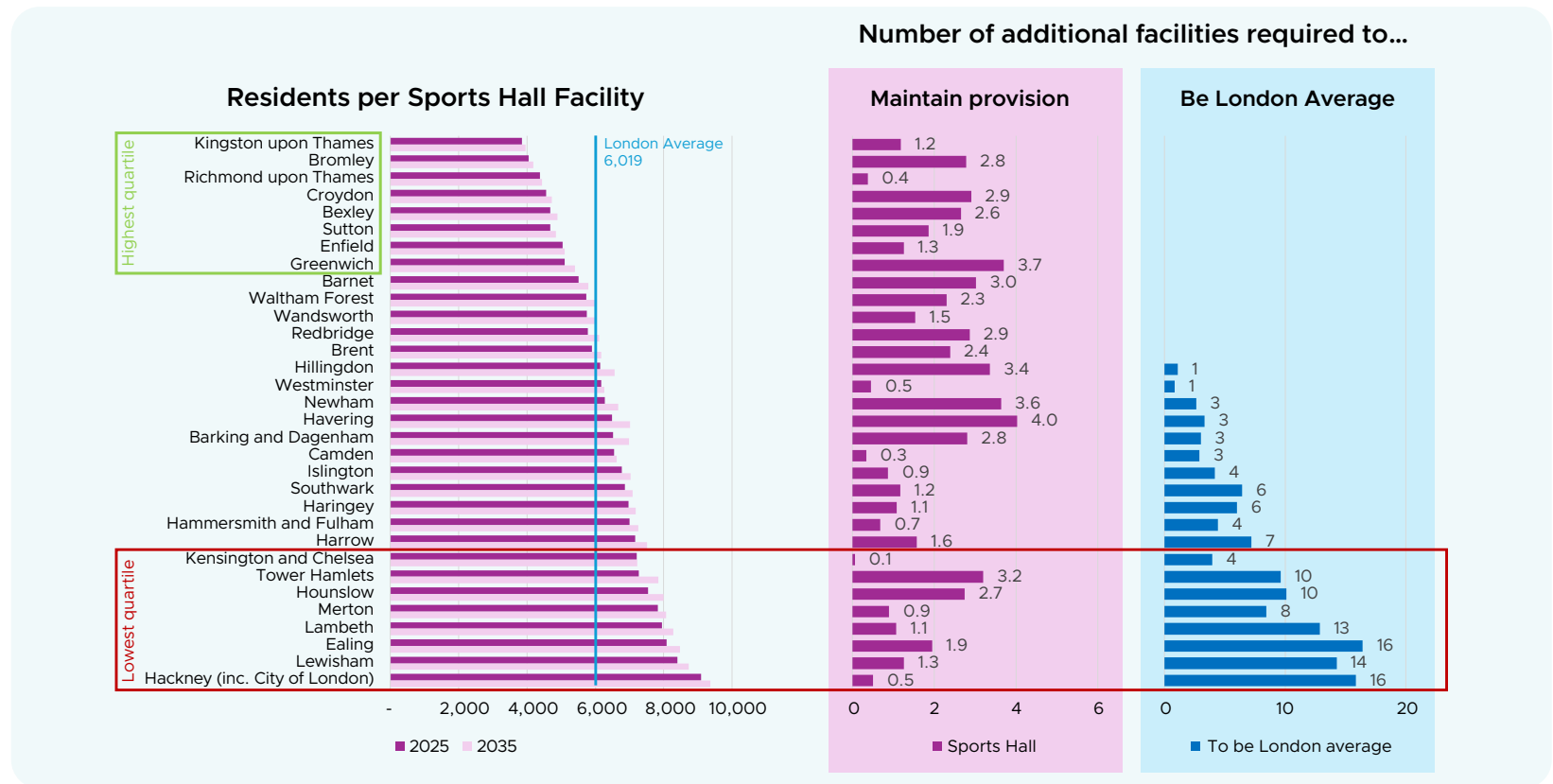
- 0.5 in Hackney
- 1.3 in Lewisham
- 1.9 in Ealing
- 1.1 in Lambeth

- 0.9 in Merton
- 2.7 in Hounslow
- 3.2 in Tower Hamlets
- 0.1 in K&C

Moving all underserved boroughs to the current London Average would require 134 additional Sports Hall Facilities.

63 more Sports Halls to maintain provision across London

134 more Sports Halls to move underserved boroughs to be London average





PRIORITISE BUILDING CAPACITY IN THE BOROUGHs WHO ARE ALREADY THE MOST UNDERSERVED *continued*

Maintaining provision of Studios in the most underserved boroughs would require:

- 1.1 in Brent
- 1.0 in Croydon
- 2.4 in Newham
- 1.2 in Harrow
- 1.8 in Redbridge

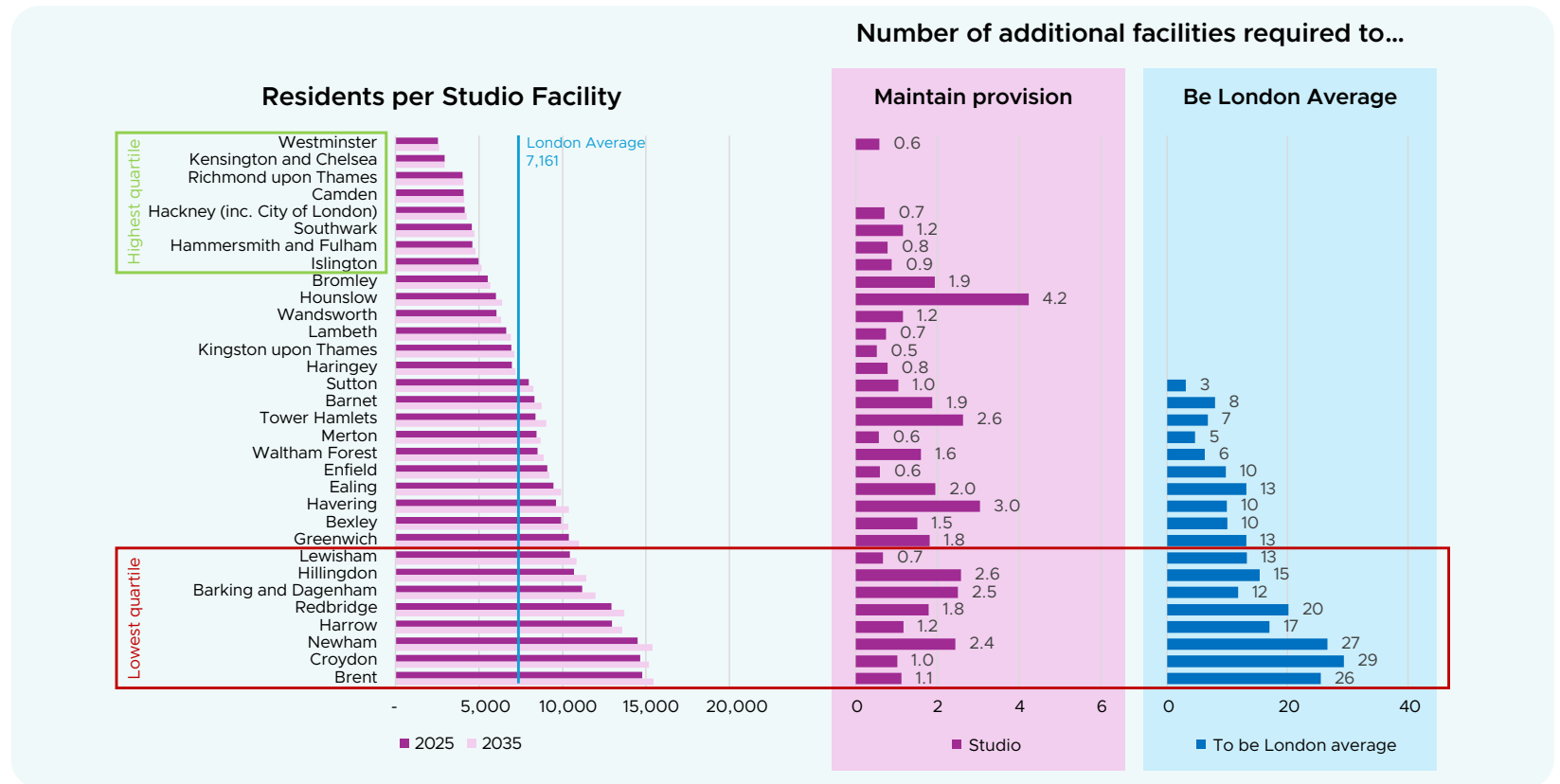
- 2.5 in B&D
- 2.6 in Hillingdon
- 0.7 Lewisham

Moving all underserved boroughs to the current London Average would require 244 additional Studio Facilities.

There are good examples of non-traditional spaces - such as libraries, community centres and retail units - being an appropriate substitute for Studio facilities.

53 more Studios to maintain provision across London

244 more Studios to move underserved boroughs to be London average





CAPACITY COULD BE INCREASED THROUGH BETTER ACCESSIBILITY

Active Places data from January 2026 shows whether a facility is accessible to the public, ownership type, and hours of availability.

For the facilities requiring the largest increase, in the most underserved boroughs, the data show:

- **Health & Fitness Gyms** are accessible to the public, for long hours. Commercial ownership means cost will be a likely barrier. **Local Authorities should incentivise commercial organisations to address accessibility for priority groups.**

- **Sports Halls** are mostly within Education settings. Access is more limited and operating hours are short. **Opening School Facilities programme (OSF) unlocks this capacity beyond Children & Young People.**
- **Studios** show a mix of ownership and accessibility, which could be higher, so **could benefit from a range of measures.**

H&F Gyms open 16 hours a day

71% of Sports Halls are Education owned

Health and Fitness Gym	Number of facilities	% Public	% Private	% Education owned	% Local Authority owned	% Commercial owned	% Sport Club owned	% Community Organisation owned	Average Hours per Day
Barking and Dagenham	18	83%	17%	44%	17%	28%		0%	14
Brent	28	89%	11%	21%	14%	64%		0%	17
Lambeth	41	83%	17%	12%	24%	59%		2%	17
Lewisham	29	79%	21%	31%	21%	45%		3%	15
Newham	32	81%	19%	28%	19%	47%		6%	15
Tower Hamlets	40	85%	15%	18%	18%	60%		3%	15
Grand Total	188	84%	16%	23%	19%	53%		3%	16

Sports Hall	Number of facilities	% Public	% Private	% Education owned	% Local Authority owned	% Commercial owned	% Sport Club owned	% Community Organisation owned	Average Hours per Day
Barking and Dagenham	36	56%	44%	78%	6%	0%	3%	14%	9
Brent	60	73%	27%	80%	10%	0%	8%	2%	10
Lambeth	40	83%	18%	63%	20%	0%	15%	0%	10
Lewisham	36	75%	25%	61%	22%	6%	6%	6%	10
Newham	60	77%	23%	70%	20%	0%	7%	3%	9
Tower Hamlets	46	65%	35%	67%	13%	0%	13%	7%	9
Grand Total	278	72%	28%	71%	15%	1%	9%	5%	9

Studio	Number of facilities	% Public	% Private	% Education owned	% Local Authority owned	% Commercial owned	% Sport Club owned	% Community Organisation owned	Average Hours per Day
Barking and Dagenham	21	90%	10%	48%	24%	10%		5%	12
Brent	24	96%	4%	38%	25%	38%		0%	13
Lambeth	48	96%	4%	25%	33%	40%		2%	13
Lewisham	29	90%	10%	31%	31%	28%		10%	14
Newham	26	88%	12%	38%	35%	19%		4%	13
Tower Hamlets	40	90%	10%	25%	18%	53%		3%	13
Grand Total	188	92%	8%	32%	28%	34%		4%	13



CONCLUSION





TAKE DECISIVE ACTION TODAY TO PROTECT THE HEALTH AND WELLBEING OF LONDONER'S TOMORROW

THANKS

London Sport colleagues

Sport England

Helen Price
Simon Pang
Ben Burak

GLA

Ben Corr

ONS

Rich Pereira

Trajectory Partnership

Barry Clark
Tom Johnson
Harry Baker

Opinium

Matthew Howlett
James Endersby

TECHNICAL WRITE-UP

[TL1 Methodology Write Up.docx](#)

London's population is changing rapidly - growing in size, ageing in profile, and shifting unevenly across boroughs. This research shows clearly that these changes will reshape demand for sport and physical activity facilities over the next decade.

The challenge facing London is not simply one of population growth. It is about whether the capital's infrastructure, planning, and investment decisions can adapt quickly enough to meet changing patterns of need. Without action, existing inequalities in access to facilities are likely to deepen, particularly in boroughs already experiencing the greatest levels of deprivation and the lowest levels of provision.



This analysis provides, for the first time, a clearer picture of where future pressures will emerge and where intervention is most urgently required. It demonstrates that maintaining current levels of provision alone will require significant expansion in capacity - through new facilities, better use of existing spaces, and more coordinated planning across sectors.

But this should not be viewed only as a facilities challenge. The implications extend to workforce planning, health and care integration, school estate decisions, community infrastructure, and the broader systems that support Londoners to live active and healthy lives. The projected growth in older adults, who are the least likely group to be active, means demand for accessible, inclusive, and preventative opportunities to be active will become even more important over time.

The evidence also highlights the importance of acting now. Decisions made over the next few years - about investment, land use, school facilities, partnerships, and local priorities - will shape whether London is prepared for the demands of 2035. Delaying action risks placing even greater pressure on already stretched facilities and communities.

Population change is inevitable. Worsening inequality is not.

With coordinated action, targeted investment, and a long-term commitment to equitable access, London has the opportunity not only to meet future demand, but to build a stronger, fairer, and more sustainable sport and physical activity system for the next generation.

8

APPENDIX





SHARP DECLINE IN LONDON PUPIL NUMBERS RAISES THE RISK OF CLOSURES

Schools:

Key points made in the January 2026 report press release are:

“Demand for school places in London is continuing to decline, raising the risk of school closures and reduced curriculum options, according to a new report from London Councils.

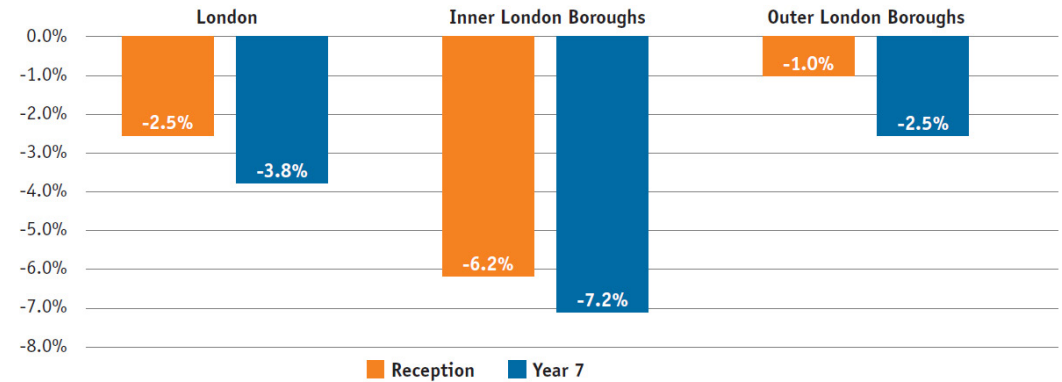
“School Capacity Survey (SCAP) data from all 32 boroughs shows a forecast decline of 3.8% in Year 7 places and 2.5% in reception places between 2025/6 and 2029/30. **Inner London faces the sharpest drop**, as demand for Year 7 places is expected to fall by 7.6% and reception places by 6.4% over the next four years.

“For the first time, the decline in demand for Year 7 places is greater than for reception places.

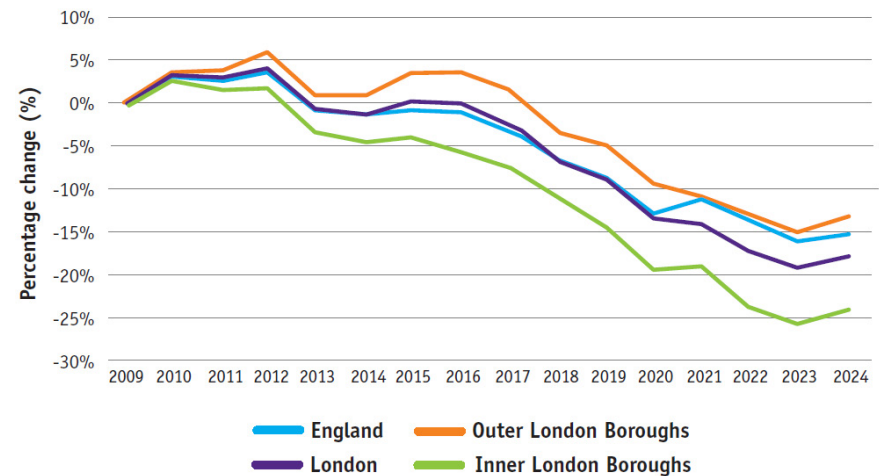
“As school funding is allocated on a per-pupil basis, London Councils estimates that the forecast decline in demand for school places would **lead to around £15m in funding cuts for primary schools and £30m for secondary schools in London.**

“Because schools are funded on a per-pupil basis, declining numbers have already significantly affected school finances, leading to **approximately 90 school closures or mergers in the last five years.**”

Graph 1: Percentage change in London school places, 2025/26 to 2029/30



Graph 4: Percentage Change in Total Numbers of Live Births Compared to 2009



Sources:

[Sharp decline in London pupil numbers puts school standards at risk | London Councils](#)

Managing school rolls and maintaining educational standards in London, January 2026, London Councils

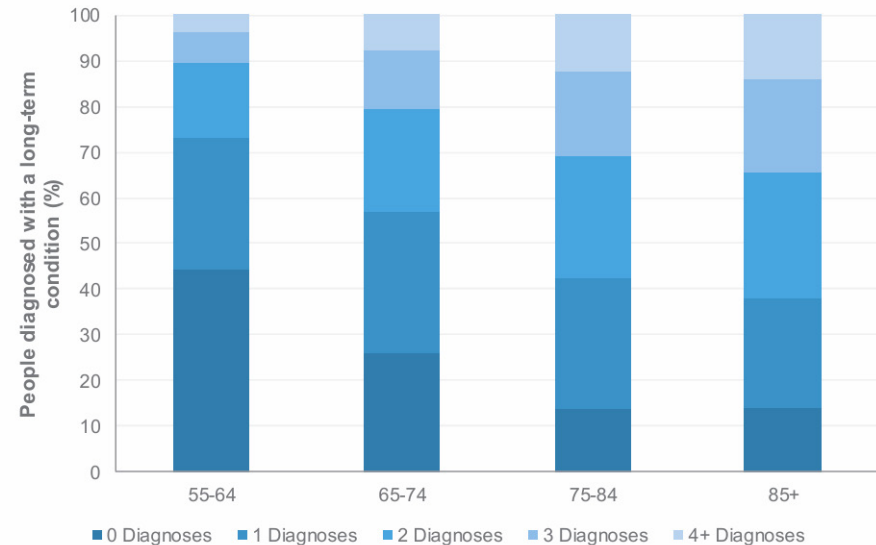


HALF OF ADULTS IN ENGLAND AGED 65+ HAVE MULTIPLE LONG-TERM HEALTH CONDITIONS

Older adults:

- The likelihood of having a long-term health condition (LTHC) diagnosis increases with age
- The likelihood of multiple LTHC diagnosis increases with age
- *“People with multiple long-term conditions (two or more) have an increased risk of functional decline, poorer quality of life, greater healthcare use and higher mortality.”*

Figure 4 Percentage of people with diagnosed long-term conditions, by age group, England



Sources:

[age-uk-briefing-state-of-health-and-care-july-2023-abridged-version.pdf](#)



APPROPRIATE OPPORTUNITIES FOR NON-UK BORN ADULTS TO BE ACTIVE COULD BE INCREASINGLY IN DEMAND

Immigration:

With deaths now outnumbering births, international immigration is, and will continue to be, the driver of population growth in London. The most common non-UK country of birth within London's population is India, followed by Romania, Poland, Bangladesh and Pakistan¹⁸.

The popularity of sports in these countries shows that, whilst football is ubiquitous, there are also strong preferences for sports like Cricket and Kabaddi¹⁹.

Planning for sport and physical activity in London should consider the growing demand for these sports from the growing non-UK born population. Sports like Kabaddi and Polish Speedway have limited mainstream presence in England. Migrants from those backgrounds may therefore participate less in sports after migration unless specific provision exists.

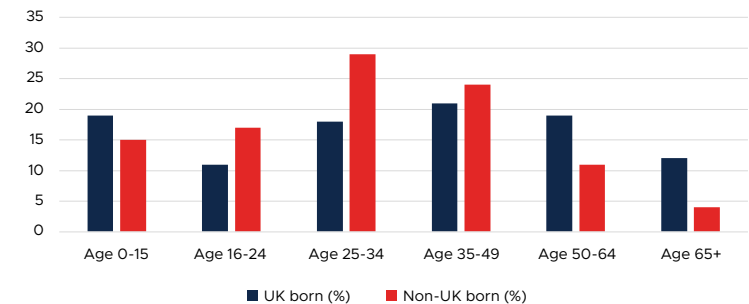
The age profile of non-UK born London residents skews toward the younger working-age adults. But participation in physical activity by ethnic group in London is lowest among South-Asian adults (which includes India, Bangladesh and Pakistan, but not China). 56% of South-Asian born adults in London meet CMO activity guidelines (compared to 65% of London adults overall)²⁰.

This suggests there is potential to engage more of the non-UK born population in physical activity. But planning provision based on past demand risks underestimating the needs of young adult migrants. Planning should consider culturally appropriate opportunities and non-traditional venues.

Needs will vary by borough, as boroughs with the highest proportions of non-UK born residents are not consistent in terms of socioeconomic status²¹.

County of Birth	London pop.	Most popular sports
India	323k	Cricket, Kabaddi, Football
Romania	176k	Football, Gymnastics, Tennis/Handball
Poland	149k	Football, Volleyball, Basketball/Handball
Bangladesh	139k	Cricket, Kabaddi, Football
Pakistan	130k	Cricket, Hockey, Football

Age of UK Born vs Non-UK Born Residents



Borough	% Non-UK Born Residents (2021)
Brent	56.1
Westminster	55.6
Kensington and Chelsea	53.9
Newham	53.7
Harrow	51.1

18. ONS Census 2021 Country of Birth]

19. https://www.business-standard.com/cricket/news/india-s-sport-audience-base-678-mn-2-cricketers-are-most-liked-report-124032000232_1.html

20. Sport England Active Lives Adult Survey 2023-24]

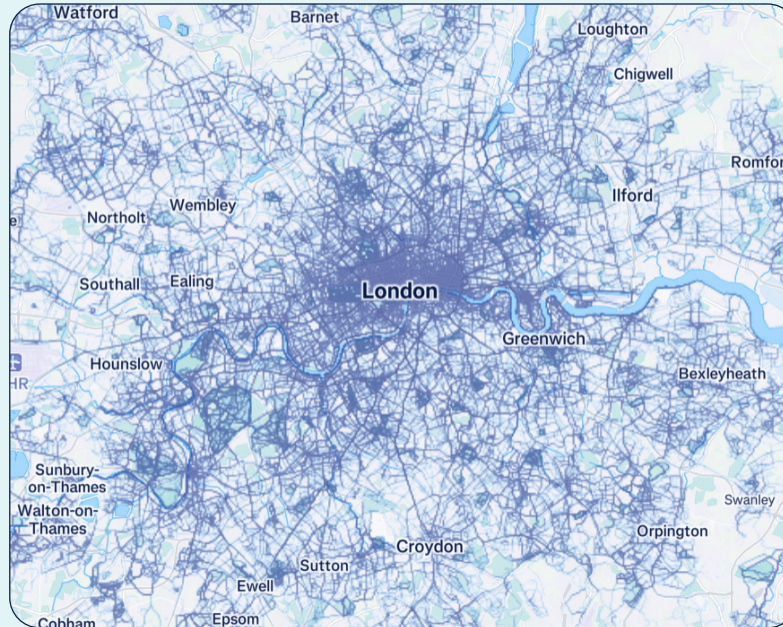
21. ONS Census 2021 / Annual Population Survey 2021, and London Data Store / ONS migration outputs]



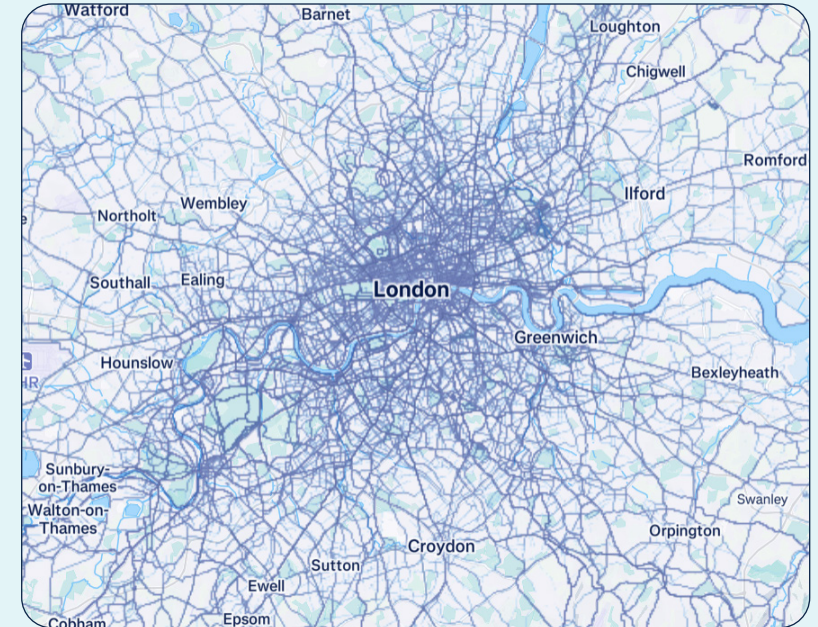
STRAVA DATA SHOWS HOW PUBLIC SPACES ARE UTILISED FOR RUNNING AND CYCLING IN LONDON

Run, Cycle and Garden spaces in London:

- Analysis of Strava heat maps for running and cycling reveals the extent to which these activities are conducted in public spaces: Road networks; Public parks; River and canal embankments.



Strava **Run** heatmap (April 2026)



Strava **Cycle** heatmap (April 2026)

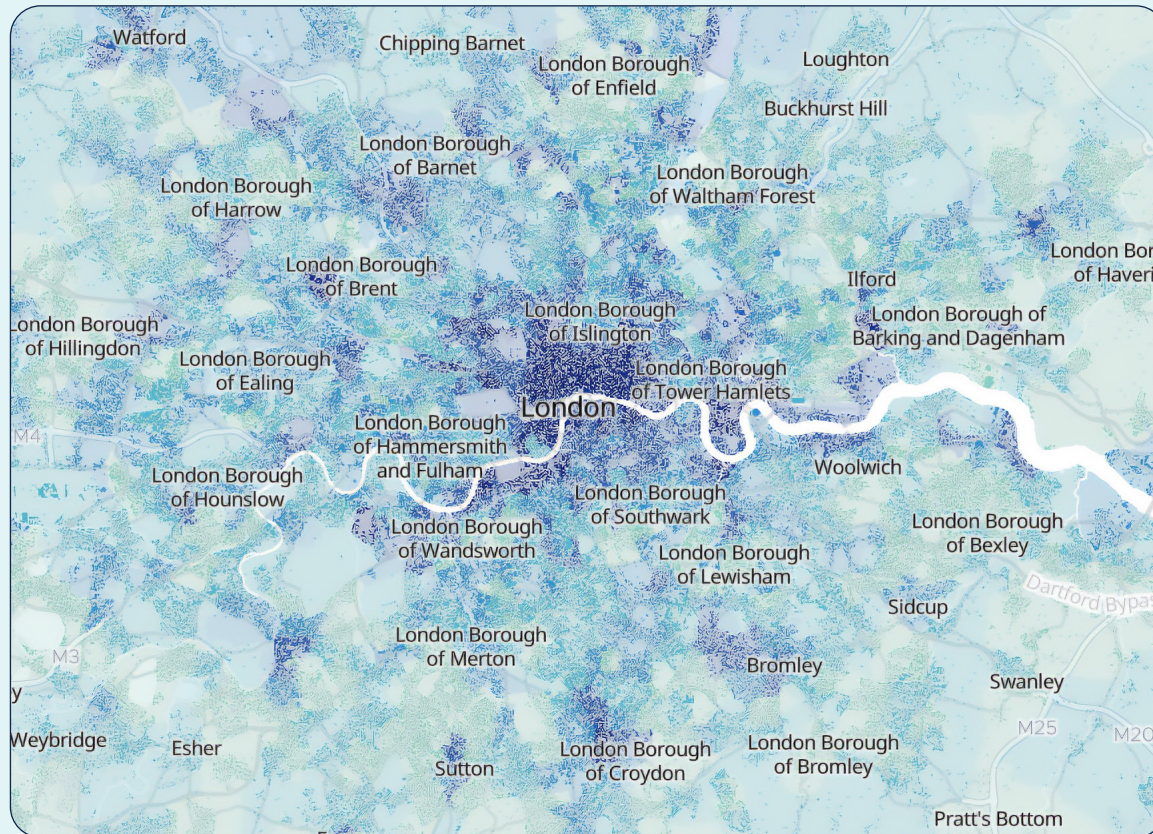


ONS DATA SHOWS HOW LONDONERS ARE LESS LIKELY TO BE ABLE TO ACCESS A GARDEN, AND THAT LONDON GARDENS ARE SMALLER

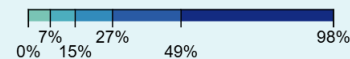
Run, Cycle and Garden spaces in London:

According to ONS analysis conducted during 2020 lockdowns:

- 1-in-5 households in London did not have access to a garden
- The London figure is the highest of any region in Britain, and compares to a national figure for Great Britain of 1-in-8
- At a national level, Black people are nearly 4 times as likely as White people to not have a private garden
- Older people are the most likely to have a garden (only 1-in-12 of those aged 65+ do not have access)
- The average garden in London is 26% smaller than the national average (at 140 square meters, half the size of a tennis court)



ONS: % of dwellings without garden access (May 2020)



Source: *One in eight British households has no garden* - Office for National Statistics



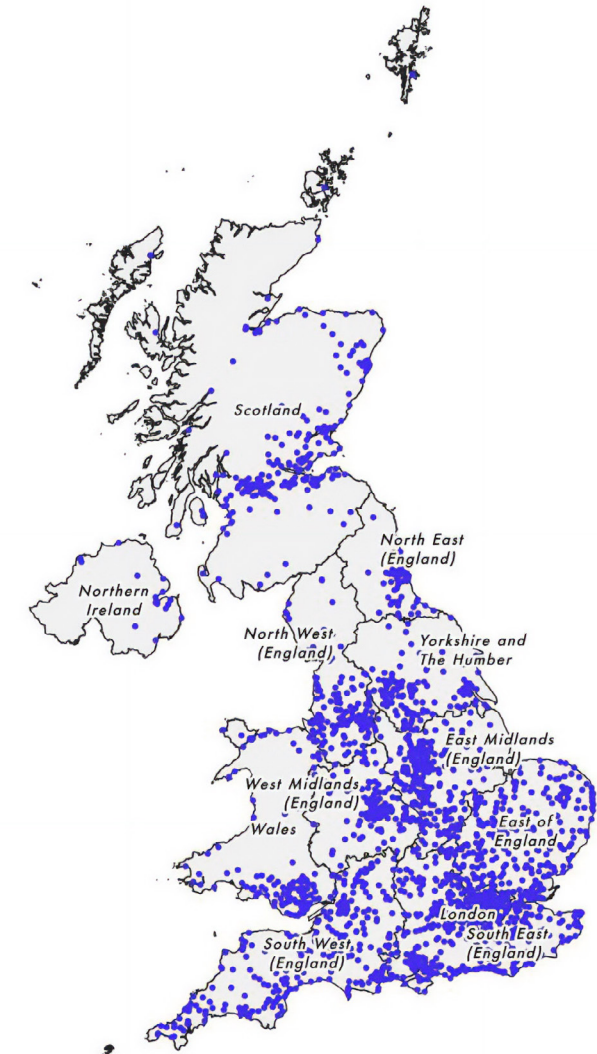
FIRST UK AUDIT OF SKATEABLE PLACES SHOWS SIGNIFICANT VARIATION ACROSS REGIONS

Skateable spaces:

Skateboard GB (working with Goldsmiths, University of London, and Betongpark) have released findings from their national audit of skateable spaces.

Headlines:

- The study is the first UK audit of skateable places.
- The study identified 1,923 skateable spaces (including outdoor and indoor skateparks, DIY sites, and significant street-skating locations).
- There is significant variation in provision across the UK.
- The Southwest, East of England and Scotland have relatively high provisions when considering the populations in those regions. **London is home to around 8% of skate facilities, but also around 13% of the UK population (ONS 2024).**



Source: [Skateboard GB Reveals Results of First National Audit of Skateparks | Skateboard GB | Run by skateboarders. For skateboarders.](#)



PLAYGROUNDS IN LONDON ARE WORKING HARD IN THE ABSENCE OF OTHER FACILITIES

Playgrounds:

'To Play or Not to Play: Mapping Unequal Provision of Children's Playgrounds' from 2025 gives information about playgrounds across England.

The research shows that Playgrounds (which vary greatly in size, equipment and state of repair) in London have been positioned to serve children in our most deprived communities (see IMD1 in the chart above).

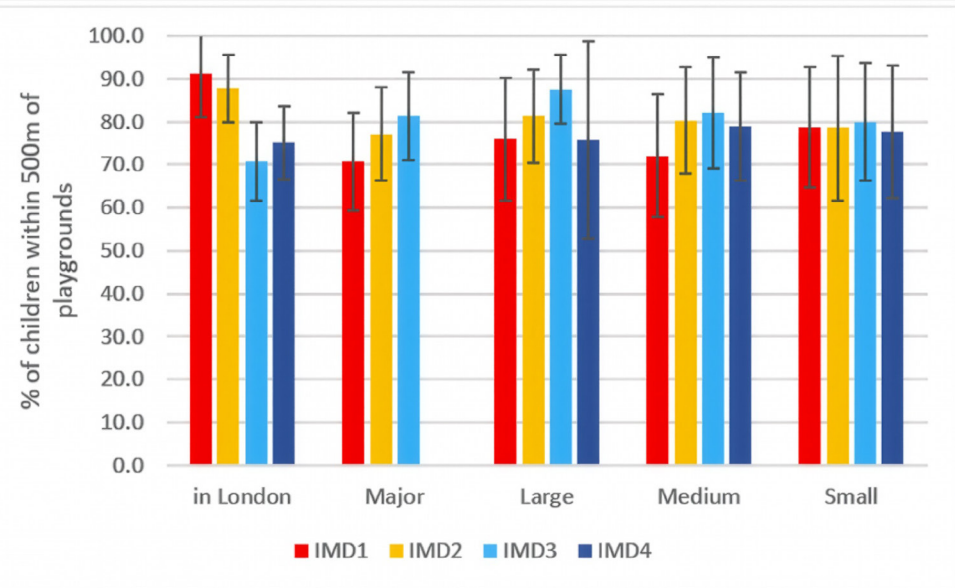
London have a high proportion of the highest deprivation in England. 14 (44%) of London's boroughs are in the lowest quartile (lowest 25%) of local authority areas in England in IMD25.

Children in these same boroughs - and there are a LOT of children in these boroughs - have far fewer other sport and physical activity facilities available to them. 1-in-5 children in these boroughs do not have access to a garden or outdoor balcony.

Playgrounds in these boroughs are doing a lot of heavy lifting. They buck the trend that otherwise leaves children in the most deprived areas in London with also the fewest facilities.



Figure 3. The percentage of children (under 16) within 500 m of playgrounds by level of deprivation and settlement category (with standard deviation bars).



Source: *To Play or Not to Play: Mapping Unequal Provision of Children's Playgrounds*



THE COST OF DELIVERING THE ADDITIONAL FACILITIES REQUIRED TO MAINTAIN PROVISION IN LONDON EXCEEDS £200M

Cost of facilities:

- Estimations of cost for additional facilities calculated in this report equal £203m.
- These estimations rely on Sport England Facility Costs Q4 2025 where available.
- Requirements were separated, rather than relying on Community Leisure Centres which could meet multiple requirements, but not in the ratio / numbers needed.
- Where the required granularity of information was not available in the Sport England document, estimates (for Golf, Gyms, Squash, Studio) were achieved using commercial sources / quotes.
- In each case, a low cost to mid-range solution was used for the estimate.

	Type (cheapest option):	Cost of 1	Maintain: London overall		Maintain: Priority		LDN Ave.: Priority	
			#	£	#	£	#	£
Artificial Grass Pitch	Senior 23 mm sand-filled pitch, fenced, sports lighting (106 x 70 m)	£ 1,095,000	15.7	£ 17,212,145				
Athletics	6-lane track with 110 m straight both sides, grass infield, artificial surfaced throws, jumps and end fans, sports lighting	£ 1,810,000	2.5	£ 4,486,345				
Golf	18-hole course	£ 4,895,000	4.0	£ 19,359,735				
Grass Pitches	Football Natural Turf Pitch-Senior Pitch (106m x 70m)	£ 115,000	32.5	£ 3,742,545				
Health and Fitness Gym	Mid-range	£ 40,000	71.4	£ 2,857,073	14	£ 560,000	71	£ 2,840,000
Indoor Bowls	6 Rinks	£ 2,760,000	1.6	£ 4,432,152				
Indoor Tennis Centre	3 Court Centre	£ 3,115,000	2.1	£ 6,427,668				
Outdoor Tennis Courts	2 courts, macadam, fenced, sports lighting (36.58 x 33.53 m)	£ 260,000	16.9	£ 4,385,813				
Sports Hall	1-court hall (18 x 10 m)	£ 915,000	63.2	£ 57,787,888	15	£ 13,725,000	43	£ 39,345,000
Squash Courts	Standard court	£ 60,000	7.0	£ 422,750				
Studio	Leisure Local	£ 25,000	53.4	£ 1,336,111	12	£ 300,000	85	£ 2,125,000
Swimming Pools (sqm)	Based on 4-lane 25m x 8m pool	£ 4,580,000	17.6	£ 80,565,407				
TOTAL				£ 203,015,633		£ 14,585,000		£ 44,310,000

Sources:

[Facility Costs 4Q2025](#)

<https://boothgolfandleisure.co.uk/golf-courses-how-much-do-they-cost-to-build/>

[Gym Startup Costs UK 2026: Full Guide to Opening a Gym](#)

<https://www.dynamiksportsfloors.co.uk/sports-flooring/squash-2/>

[How Much Does It Cost to Set Up a Gym in the UK?](#)



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