

# Health of the Nation

An in-depth report into UK consumer attitudes to physical exercise



*Is the UK in good shape?*

# Executive summary

How healthy are we as a nation? Are we doing enough exercise, and if not, why? What will encourage us to exercise more frequently and for longer, and what would be the economic consequences?

These are some of the questions we set out to answer with one of the most comprehensive surveys of the nation's fitness habits ever undertaken in the UK. Our study, based on an online survey of more than 10,000 responses, examines the nature of the "fitness gap" between the amount of exercise we need to stay healthy and the amount of exercise we are actually doing.

Our analysis confirms that if **more** people took **more** exercise **more** frequently, there would be a real and measurable improvement in the UK's economic health as well as its physical fitness. Narrowing the fitness gap could ease the burden on the National Health Service (NHS) and improve companies' productivity and profitability.

The Department of Health is already taking steps to improve the nation's health and fitness. The Chief Medical Officer, Sir Liam Donaldson, says that adults should exercise for at least 30 minutes a day, 5 days a week. To achieve this objective, the government has set a target of building enough new facilities to ensure that by 2020 no one will be more than a 20-minute journey by foot, bike, car or public transport, from at least one leisure centre, swimming pool or other exercise facility. The government have also set a target that by 2020 70% of the UK population will be doing 30 minutes of exercise a day, 5 days a week.

Our research reveals that our current exercise habits fall considerably short of the government target. Most of us – 94.3% – accept the link between exercise and good health, but almost half of us – 47.9% – do less exercise than the recommended 150 minutes per week. This figure rises to 51.6% when you exclude walking. Therefore, both the number and the duration of our exercise sessions fall short of the government's guidelines.

Just over an eighth of respondents – 12.7% – say a lack of convenient facilities or areas to exercise prevents them from exercising as much as they think they should. Those who complain of a dearth of facilities are likely to be among the keenest to keep fit. In other words, it appears that people who already take regular exercise – rather than those who do too little physical activity – are most likely to use additional facilities, thus meaning an increase in facilities will not necessarily increase levels of exercise by those falling behind of the government targets.

Roads and outdoor spaces are where we are most likely to exercise. Walking is by far the most common form of exercise in the UK, followed by jogging or running. Less than a quarter, 23.9%, have used a health club and just 17.5% used a leisure centre.

We can reveal that our research shows that the key barriers to exercise are a lack of motivation and a shortage of time.

Work and family commitments prevent 33.9% and 26.7% of respondents respectively from exercising as much as they should. Just over a fifth say that cost prohibits taking as much physical activity as they should. This evidence suggests the government commitment to building more facilities may not be the answer to improving the population's fitness.

Employers will not be surprised that people with a demanding career find relatively little time for physical activity. But human resource managers should note that people whose employers encourage them to take time to exercise complete 4.4 sessions a week, significantly more than the 3.4 sessions by those whose employers do not actively encourage exercise.

If the government target of 70% of the population exercising for 150 minutes or more per week is reached, we forecast that sick days would be cut by 2.78m saving employers a total of £487.2m a year in lost productivity\*. The same increase could axe doctor and hospital visits by 5.8m a year, giving a minimum annual saving to the NHS of £81.22m excluding any savings for medication and follow up treatment.

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\*This figure is based on the assumption that the average daily output of a UK worker is £175 calculated by dividing UK GDP of £1,267bn (2005 Pre-Budget report forecast for 2006) by 29m workers (ONS employment figure) divided by 250 typical working days per annum.

This prediction is based on our finding that in the last 12 months those who took more than 150 minutes' exercise took 3.0 sick days on average compared with 3.5 taken by those who took less than the recommended amount of physical activity. Exercisers who clock up more than 150 minutes made 1.9 doctor and hospital visits on average compared with 2.6 by those who do less than the 150 minutes.

Time is one of the main reasons we allow our health club and leisure centres memberships and our exercise programmes to lapse. Of those who terminate their memberships, a quarter say they don't use the facilities often enough to justify membership and a third state it is too stretching for their monthly budget despite expenditure on exercise being on average significantly less than expenditure on other leisure activities. Increased work demands are cited by a quarter of participants and increased family demands by another 18.5%.

People are more likely to exercise more frequently if they have a social or charitable motivation as well as a concern for their fitness. For example, those whose main reason for training is a charity event exercise on average 9% more than those who exercise mainly for personal health reasons.

Looking ahead, what are the challenges for those who seek to close the fitness gap and improve the health of the nation?

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