How we play - the habits of community sport

The trends affecting sporting habits and how the sport sector is both leading them and responding to them

SPORT ENGLAND

Introduction

This report explores the trends affecting sporting habits, and how the sports sector is both driving and responding to them. Understanding and responding to these trends will help everyone in sport, and hence this report is relevant to sport national governing bodies (NGBs), local authorities (LAs), county sports partnerships (CSPs), leisure operators, the education sector and the other organisations shaping delivery that is relevant to different target audiences and local communities. To support this practical application, case studies are included showing how different organisations have successfully responded to different gaps, trends and opportunities across the world of sport.

The aim of this report is to use insight to start conversations, and to encourage our partners to do the same, rather than provide exhaustive insights. It focuses on the key themes and messages relevant to a range of delivery organisations. To support it, we will continue to work with the sector to build their understanding of these key trends from an audience, sport and place-based perspective.

Through collectively understanding, sharing and applying these insights, the sector can continue to work together to transform community sport and get more people adopting a sporting habit for life.

In brief: habits in community sport

1 – The broader context for community sport

Chapter 1 explores how current economic and technology trends are shaping the spending priorities of the public sector and individual consumers.

The economic landscape remains challenging. Reduced public spending and disposable income are affecting sports funding and delivery

As a result, consumers are seeking greater value and not just cheaper alternatives

Facilities management is increasingly being outsourced in a bid to find alternative business models that improve RoI

Local authorities don't fund sport for its own sake… but sport represents an opportunity, with a value of over £20 billion, supporting 2.3% of all jobs in England, and with health benefits estimated at £1.7 billion in terms of savings in healthcare costs

Despite tough times, the Olympic legacy remains on track, with 1.4 million more people playing sport once a week than in 2005.

2 – What is a sporting habit?

Chapter 2 explores some of the key sporting habits that participants are demonstrating and how these habits can be developed and changed.

- People's sporting habits vary greatly, and a regular habit doesn't always mean people participate each week. There are seasonal and other influencing factors
- Interruptions such as injury, poor weather or the end of a season can all threaten longer-term participation habits
- Sports don't often have to compete with one another for their customers' attention. People want variety rather than an either/or choice
- Life transitions may be a challenge – but they're also an opportunity to create new habits
- Life transitions are the main reason people leave sport – but get them to

love sport during their youth, and they're more likely to stick with it and create a lifelong habit

3 – Is sport for all?

Chapter 3 explores some of the choices different groups of people are making, focusing on four key demographic groups where opportunities for growth are high.

- While sporting participation is up overall since 2005, participation behaviours are changing across age bands
- 12 million women say they want to do more sport – and to have fun doing it
- Women, more than any other group, are looking to participate with a group of people like them
- More disabled people are now participating, but to accelerate this trend the needs of different impairment sub-groups need to be accommodated
- BME participation is growing but varies greatly. Cultural and other race-based differences such as faith need to be accommodated
- Demand for sport is more consistent across socio-economic groups than current supply suggests. Sport is failing to be more attractive and accessible to these groups, although some organisations including Street Games and Kickz are having considerable success
- It's not all about competitiveness. Variety, having fun, being with peers and playing with people of a similar level also count.

4 – Consumer choices in a mixed economy

Chapter 4 looks at ways in which sport can be presented as a viable and scalable consumer choice by incorporating the market trends and customer needs.

- Sport has to compete for people's time with many other activities, many of which as also fun, social or healthy
- To succeed in attracting participants, sport needs to be easy to choose. Barriers to entry from skills, location and timing need to be lowered, so that sport better fits into people's changing lifestyles
- 'If we build it, they will come' simply isn't true. Instead, successful outcomes have resulted when sports providers have listened first, and delivered second
- Access to personalised information helps influence behaviours and create stronger habits
- Public, not-for-profit and commercial sports providers must continue to work together in a mixed economy approach, to create a seamless offer for consumers

5 – Succeeding in a complex landscape

Case studies provide valuable lessons:

- **parkrun**: creating customer-led growth. Saturday 5k runs at over 200 locations. Flexibility: people turn up and run. Simplicity: easy to organise at local level

- **Us Girls: making sport easy to try**: Multi-sports sessions for young mums in Chorley. Listening: format emerged from focus group consultation. Practicality: addressed associated costs eg. transport and childcare, and not just direct costs. Partnership: work with other organisations that already engage with target audience – even if they're not sports-related

- **Ping!:** treating delivery partners like customers. A nationwide table tennis initiative. Collaboration: listening to and working with delivery partners. Simplicity: streamlining the basic package. Economies of scale: helping local delivery partners with centralised funding applications and procurement processes

- **Sound Basketball:** combining sport with other lifestyle interests. After-school combination of basketball and music. Listening: student feedback prompted activity planning. Flexibility: programme effectively ran itself. Ownership: participants could adapt the model to their own needs.

- **No Strings Badminton:** expanding the reach of social pay and play. Flexible, local, sociable badminton sessions. Flexibility: turn up and play – don't even bring a racket. Think broadly: it's not just about the sport, but the opportunity to socialise. Teamwork: listen to and work with delivery partners. Access: make it easy for customers.

- **LTA & Tennis Foundation:** integrating inclusive tennis. A nationwide tennis network for disabled people. Partnership: work closely with relevant disability organisations. Listening: talking to potential participants established different needs from different impairment groups. Clarity: develop a plan that works at local as well as national levels.

Chapter 1 – the broader context for community sport

As the next NGB funding cycle begins, the broader landscape within which Sport England's partners are operating is fundamentally different from four years ago. Economically this is the longest slump in more than a century, and it's having a profound impact on both public sector and consumer spending. As public spending priorities narrow, the sport sector has to understand the wider social and health benefits sport can provide within the local community. Impacting on these outcomes can then justify the discretionary investment into sport-related services.

Similarly, the lifestyles and influences on consumer spending, particularly among young people, are evolving at an ever faster rate. New technology and innovations are often at the heart of this evolution. They are enabling consumers to continue their work and leisure activities from home, and to research and book activities without ever needing to speak with a real person.

This first chapter explores these trends and their potential impact on sport. The following chapters will then look more specifically at the habits and choices of the population, and how sport is responding to them.

The economic landscape remains challenging

The economic climate has been relentlessly challenging in recent years. In 2008 we entered what's been described as 'the deepest recession since the war,' and the UK economy has not yet fully recovered. The economic recovery is forecast to be both slow and bumpy. May 2013 Treasury forecasts indicate signs of economic recovery over the longer term, but it is likely to be years until consumer confidence fully returns.

The aspiration to maintain and grow participation is set against the backdrop of a recession, the banking crisis, weakness in the housing market, falling output and unemployment.

ECONOMIC CHALLENGES

Recovery is forecast to be slow

	2012	2013	2014	2015	2016	2017	Movement
Output (GDP growth)	0.0%	0.9%	1.7%	2.1%	2.2%	2.2%	↗
Inflation (Consumer Price Index)	2.7%	2.6%	2.2%	2.2%	2.2%	2.4%	→
Unemployment (Claimants)	1.59 million	1.58 million	1.53 million	1.44 million	1.33 million	1.24 million	→
House prices (Movement)	0.0%	0.5%	1.7%	3.0%	3.6%	3.6%	↗

This economic frailty impacts sport at consumer, corporate and public levels:

- A reduction in disposable income as a result of pay freezes or rising prices leads to consumers being able to spend less on their leisure time. 57% of people plan to cut back on their entertaining and socialising, while 25% of those playing less sport cite economic or financial reasons for the change.
- Public spending constraints are impacting on funding for facilities and sports development, and leading to a changing role for local authorities within sport and leisure.
- Sport England's investment into facilities has risen, rather than following this economic trend.

Consumers are searching for greater value not cheap alternatives

25%
of those playing less sport cite economic or financial reasons

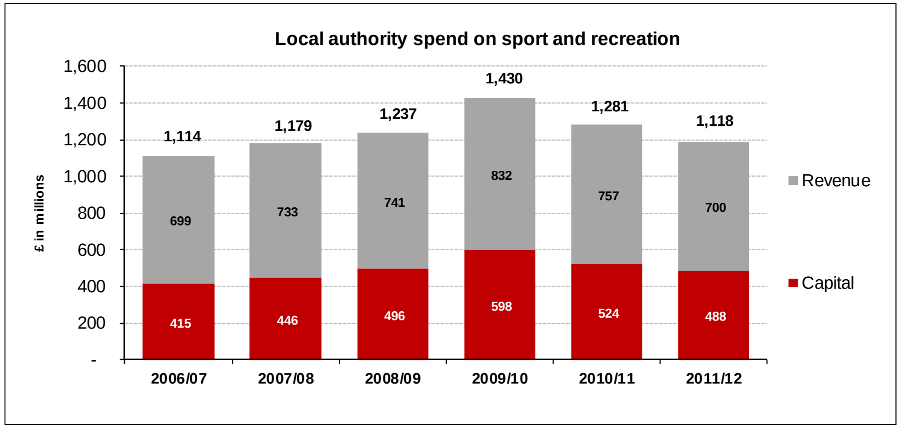
The recession has led to the continued rise of own-brand products, particularly in supermarkets. Sainsbury recently announced its quarterly sales had grown entirely on the back of its own-brand product ranges, while Waitrose has announced it is adding another 400 products to its Essentials range.

This consumer switch reflects the on-going desire for greater value. Consumers want to feel they are getting the same quality of experience for less money, not just cheaper alternatives. Similar leisure choices based on feeling worse off mean the trend to replace leisure activities with their "at home" equivalent is also set to continue.

This economic reality will make it harder for all organisations shaping and delivering sport to help consumers establish or maintain sporting habits. They need to overcome the behaviours leading to more leisure time now being spent at home and more leisure decisions being made last minute. New technologies are making availability and booking instantly available online enabling consumers to find the best deals quickly. To meet this expectation of improved value, sports organisations will need to look beyond subsidised offers to create more consistent and hence cost-effective offers.

Facilities management continues to be outsourced as the pressure for cost recovery rises

Local authorities and councils also have to respond to the sustained slump. Local government spending dropped by 17% over two years from £1.4bn in 2010 to £1.1bn in 2012, as councils faced with reduced budgets made tough choices about leisure provision compared with health, education and security. Further cuts are planned as a result of the low levels of economic growth and recent Comprehensive Spending Review. The Department for Culture, Media and Sport and the Communities and Local Government department will experience further cuts of 5% and 10% respectively in 2015-16.



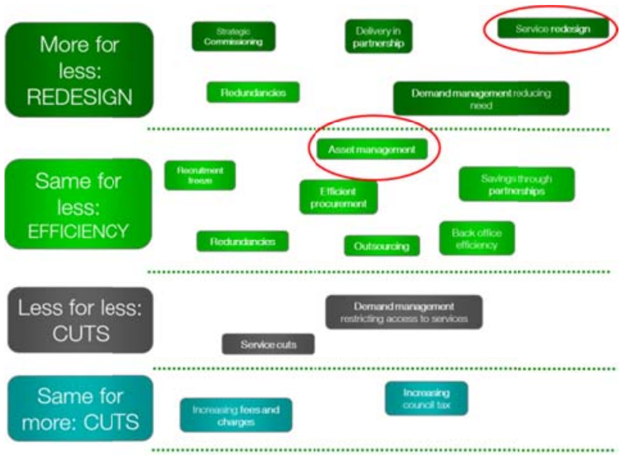
As the biggest investors into community sport, local authorities are responding to these cuts by changing their role. In some cases there has been work to rationalise and improve sporting stock. In many cases councils have shelved capital programmes and reduced revenue. More broadly, local authorities are open to a range of facility management options that can serve their population in the most effective way. This requires balancing an improved return on investment with safeguarding the service.

Both the short-run and longer term trends show financial expectations are shifting towards improved cost-recovery and lower subsidies per visit. Of the 152 facilities within the 2012 data set of the National Benchmarking Service (NBS), 55 broke even on operating costs and a further 20 facilities required less than a 10% subsidy on operating costs. According to the NBS data commercial contractor-run facilities have the best bottom line financial performance, closely followed by trust-run facilities and then in-house-run facilities.

As a result the trend to outsource facility management continues, either through commissioning or the transfer of sporting assets to community ownership. While in-house run facilities are still the majority (33% of centres in England), nationally there continues to be a growth in trust-run facilities. In-house trusts run 19% of centres and external trusts run 17%, leaving 31% run by contractors and other organisations.

It's becoming clear that subsidies can no longer be paid on many sporting facilities, and hence those that remain need to improve the return they provide. This significant shift in the financial drivers of both demand and supply will continue to have a profound and lasting impact on the market dynamics across sport. To maintain supply, all sporting organisations will need to find different business models that either reduce costs or generate new sources of revenue. This can include service redesign or demand management options such as changing operating hours, pricing or timetables.

Analysis of leisure centres by Sheffield Hallam University using the National Benchmarking Service demonstrates that some centres are already creating these more sustainable business models. The top performing 25% of leisure centres earn enough income to cover 41% more of their costs compared to the bottom



Source: Audit Commission "surviving the credit crunch"

performing 25% of centres. This is equivalent to potential savings of about £420,000 per centre and demonstrates the value that organisations across the sector could derive from a better understanding of their relative financial performance. Driving this performance is significantly better performance in at least one of three key factors – throughput, income and costs per square metre.

Local authorities don't fund sport for sport's sake

At a local level, the winds of change go beyond the spending cuts. Local authorities are being forced to make tough decisions on where to prioritise spending, and in many cases they can no longer afford to invest in sport for sport's sake. Instead it is increasingly being used as a medium through which local priorities such as health and social deprivation are addressed. This shifting focus represents both a challenge and an opportunity for the sector.

The challenge comes from fundamental changes in the factors driving where sport is delivered, and to whom. In many cases, health gains through sport will be greatest among those who are currently inactive and hence furthest from a regular sporting habit. To boost sport's role in helping the population get and stay healthy, Sport England has invested £6.2m into 15 projects through its new Get Healthy Get Into Sport fund. Over £10 million has been committed to 44 projects focused on developing sustainable links between the disability and sports sectors. In addition the £40m Community Sport Activation Fund is providing resources to support local wellbeing.

The opportunity for sport is significant. The government's drive to increase localism has led to local GPs having far greater freedom and budget that could be used to "prescribe" regular sports activity. Likewise demand for sport among disadvantaged communities often exceeds current supply, and hence working with local authorities could open up new market opportunities for many sports. There is a strong economic argument for channelling this investment into sport. A 2013 study estimated the value of sport to be over £20 billion, and it supports 2.3% of all jobs in England. Sports participation accounts for £11.8bn of this value, almost 60% of the total.

The health benefits of sport have recently been estimated at £1.7bn in terms of health care costs and £11.2bn in total economic value. An estimated £2.7 billion per annum contribution is also generated by sports volunteers.

The challenge and opportunity for sport is clear: the sector needs a better understanding of the wider social and health benefits of sport, and the value this offers to other organisations and local communities. From this understanding, the local benefits of sports participation can then be tightly matched to the local priorities of each community.

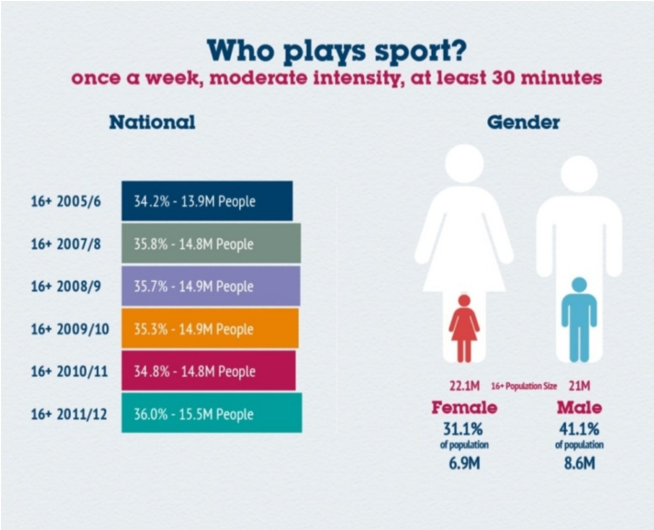
Despite the economic conditions the Olympic legacy remains on track

Despite the economic conditions, the demand for sports participation is still growing, and the impact of the successful Olympic Games has only magnified this. Around 31 million people have played sport in the last year, and 15.3 million people are playing sport once a week, every week. That's 1.4 million more than in 2005 when London won the bid to host the Olympic and Paralympic Games. The participation rate reached an all-time high in December 2012, before dropping back slightly as a result of the particularly poor weather in February/March. However, the results indicate that most of the increase seen following the Games in 2012 has indeed been retained.

There is a long way to go, but the signs are encouraging. The number of young people aged between 16 and 25 playing sport regularly has reached 3.86 million. This is an increase of nearly 63,000 on the previous 12 months, with strong advances in sports such as basketball and swimming.

There are also more women playing sport, with netball still continuing to attract high numbers of female players. Nicola Adams' success in the ring also appears to have an inspirational effect, with record numbers of women donning gloves. These have helped to drive a year-on-year increase of 89,900, narrowing the gender gap in sport.

Although there is still an unacceptable gap between the number of disabled people and non-disabled people playing sport, the figures for disabled people have been rising steadily since 2005. The latest figures show an increase of 46,600 over the past year, with Paralympic sports such as equestrianism and athletics growing in popularity.



In summary...

- The economic landscape remains challenging – funding for facilities and local delivery is being hit by reductions in public spending and disposable income
- Consumers are searching for greater value not just cheap alternatives – 'more of the same' is unlikely to succeed as consumers want to feel they are getting the same quality of experience for less money, not just cheaper alternatives
- Facilities management continues to be outsourced as the pressure for cost recovery rises – subsidies can no longer be paid on many sporting facilities and hence local authorities and facilities managers are looking for more sustainable business models
- Local authorities don't fund sport for sport's sake – to retain local investment sport needs to demonstrate that it can be an effective medium for addressing local priorities such as social deprivation
- Despite the economic conditions the Olympic legacy remains on track – demand for sport as a whole remains strong with 1.4 million more people are playing sport once a week compared to when the Games were won in 2005

Chapter 2 – what is a sporting habit?

People's sporting habits vary greatly. Examples include the daily runner training for a marathon, the 'whatever the weather' weekend angler, and the summer tennis player. Some habits are seasonal, some involve multiple sports, and for some the habit is not currently doing sport at all. Adding to the complexity, many people haven't yet formed a sporting habit, or have had it broken by injury, the weather, a major life change or simply because their playing partner is working late. This chapter explores some of these habits and how they can be developed and changed.

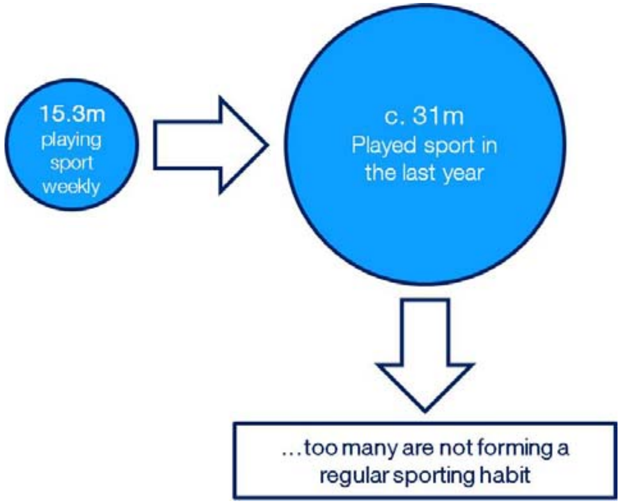
There are many different sporting habits

A person with a good sporting habit can be defined as someone who maintains a pattern of regular participation over many years by quickly getting back into the routine each time it gets interrupted. General engagement with sport remains high and so creating and maintaining good sporting habits is vital to sustaining and increasing regular participation in sport overall.

Over 70% of adults have participated at least once in the last year, with around half engaged with sport weekly (as measured by the Active People Survey). However, for many people this participation is not yet part of a consistent long-term habit.

Beneath the positive trend in the overall participation rate there is a significant amount of change within people's sporting behaviours. Only half the sporting population say they are doing the same amount of sport as 12 months ago. For the rest, their changes in frequency reflect the common challenge of helping individuals to achieve the consistency of habit.

A regular habit doesn't necessarily mean weekly

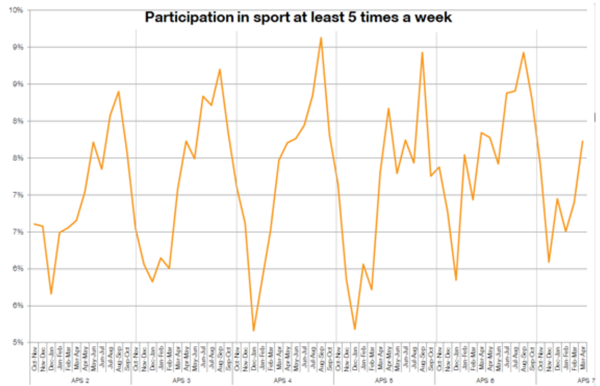


There are consistent regular habits of both participating and not participating in sport.

The frequency with which people with a regular sporting habit participate varies and includes both those above and below the 1x30 threshold. These less frequent sporting habits may be a pragmatic response to available resources (time, money, interest) at a particular moment in someone's life.

Therefore it is important to understand the right time and way to promote additional activities to such people. Doing it at the wrong time or in the wrong way might put them off sport altogether.

Frequency of participation among those with sporting habits also varies through the year. Not only do more people engage with sport in the summer than the winter, but the most sporty seem to increase the amount of time they spend playing sport. As the diagram demonstrates, there is a significant summer peak to the participation rate of at least five times a week. Such behavioural peaks have implications for pressure on available resources during the peak summer season.



Source: APS2-7Q2 (Oct 07-April 13)

For those whose habit is not to participate regularly, many simply prefer to do other things in their leisure time (22%). However, a proportion think they are not healthy enough to play sport (22%) or that they wouldn't enjoy it (14%). The current offer and messaging around sport is clearly not engaging those audiences.

Interestingly, some people perceive their behaviour to be more habitual than it really is. 12% of the population (around 5.1m people) perceive their behaviour to be a regular weekly habit, either throughout the year or at least during a season. However, they are not currently demonstrating this behaviour. This may in part reflect the level of short-term interruption in behaviour that is occurring. People intend to pick up a habit where they left off and so still consider themselves to be regularly active.

Only 9% of women blame a loss of interest in sport for their decreased

There are several reasons why people think they are playing less sport than before. 10% of people cite poor or deteriorating health, which could suggest that playing less is the first stage of them dropping out of sport. However, relatively few (just 9% of women and 7% of men) blame a loss of interest in sport for their decreased participation. Despite this, retention can't just be assumed. Participation varies from year to year and hence existing participants can't just be ignored on the assumption that they keep coming back.

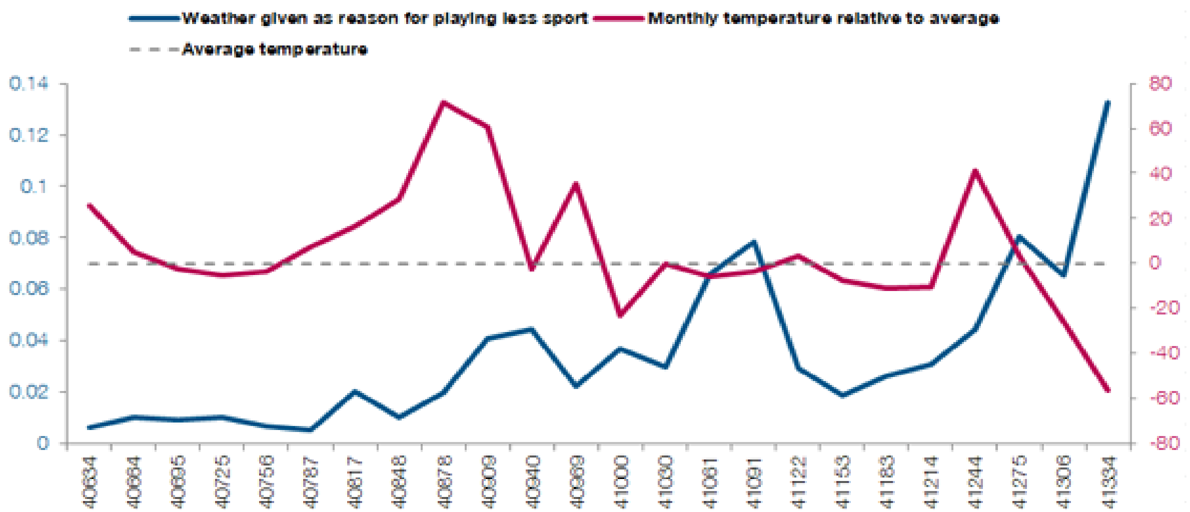
Short-term interruptions threaten long-term participation habits

In many cases playing less sport is likely to be the result of short-term interruptions. For example 22% of people playing less sport cite a lack of time due to work commitments and 16% blame recent injury or illness. The later in life injury happens, starting from the mid-30s, the more likely it seems to be a cause of drop out rather than just interruption. Part of our sector's collective challenge lies in identifying these short-term interruptions as they happen and then responding so they don't lead to a more significant lapse.

The participation of some individuals appears vulnerable to short-term interruptions. In recent years a notable cause of this has been more dramatic weather events. Colder than average temperatures during winter coupled with heavy rain throughout the year affected both the supply of sport and the willingness of some to participate at their habitual levels. Waterlogged or frozen pitches and golf courses led to fixture cancellations and loss of golf rounds. As many as 96% of rugby league fixtures were lost on one weekend in March 2013 while golf rounds dipped 45% year on year in the same month. At the same time the number of people blaming a drop in their participation on the weather spiked (blue line below).

Lapsing, lapsing, gone

A disappointingly wet summer in 2012 has also clearly contributed to a growing



Met Office statistics: Active People 5Q2 – 7Q2 (April 11 – April 13) tendency among the populace to blame the weather for their dips in participation. However the impact of the weather doesn't leave the sector powerless. Rather it needs to consider how to provide alternative opportunities, and even access to complimentary sports, when pitches and courses are closed. In cases where the weather leads to people choosing not to play even when facilities are still open, alternative offers need to be created that tap into the participants' underlying needs and motivations.

The nature of many sports themselves has always been seasonal. For instance, the majority of cricket and tennis is still played only in the summer months, when the likes of rugby union and hockey dip. Growth in indoor centres for tennis and cricket seeks to extend participation across the year, but for now this remains a choice made by the minority. The Rugby Football League has made a significant change to grow participation, shifting the core season to the summer to leave more of a winter break.

But what happens to habits during the off-season? Many seem to fill the gap with something else. In a variety of sports (not least cricket, tennis and hockey), interest peaks in the months leading up to the season among people who are otherwise active. Excitement about the prospect of cycling is also at its height ahead of summer peaks in participation, but here more of the audience is inactive, suggesting that for some, summer cycling is not part of a year-long sporting habit.

To achieve growth in participation levels, we must minimise the proportion of people whose interrupted habits start to become a more significant lapse in participation.

Life transitions remain the dominant reason for leaving sport

Life transitions remain the dominant reason people give for falling away from sports participation, particularly among the young. As many as 70% of 16-24s who leave sport and almost 60% of 25-34 year olds cite a life transition as the reason. This is reflected in both drop-off rates and the level of participation churn, particularly from the teen years to late 20s. Just 35% of 16-34 year olds report the same sporting behaviour as a year ago, while participation is 30% lower for 30 year olds than 16 year olds. In contrast, there appears to be more participation stability from late 20s to early 40s, with 53% of 35-54 year olds reporting the same behaviour year on year.

This stability may also have strong roots. Research has suggested people are more likely still to be playing sport at 25-34 if they really engaged with opportunities as 11-16 year olds and developed an affinity with sport in general at that age. Over half of those that are active agree they would have felt a sense of loss if sport had been taken away from them when they were growing up (three times the level for those that no longer participate).

Some people actively choose to stop playing sport, particularly at the key transition point of age 16 when participation in sport becomes increasingly about choice outside a structured educational setting. However many do not consciously drop out. Life changes act as habit interrupters in the first instance, and behaviours may need to adapt in order to sustain the habit and avoid it lapsing. It is the responsibility of the sport sector to help make this evolution as easy as possible. The more life transitions an individual goes through, the more the underlying sporting habit is worn down by attrition.

It's rare that sports fight over the same customer making an either/or decision

People's satisfaction with their sporting experience continues to be an important part of sustaining their behaviours, with those dropping off exhibiting much lower contentment. Part of that satisfaction is reinforced by the ability of sport to meet expectations while catering for changing needs as people move through life. Stronger, more sustained habits also seem to be associated with certain types of behaviour. What might some of the key ingredients of stronger habits be?

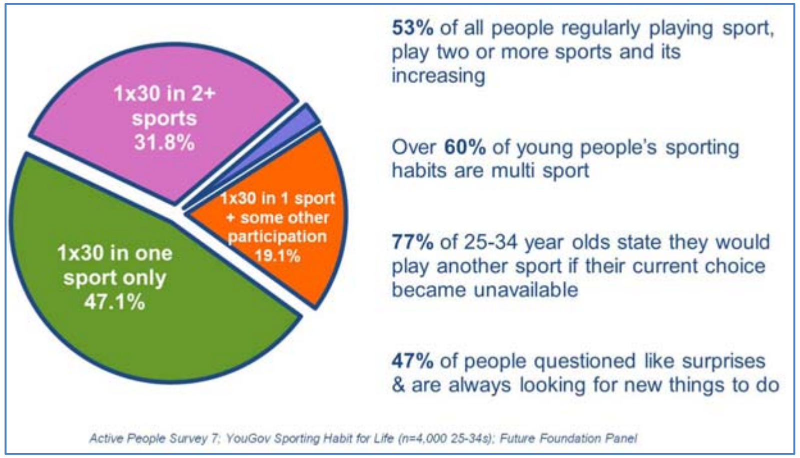
One factor that reduces susceptibility to interruption of weekly habits appears to be higher frequencies of participation. For example, in the early part of 2013, as participation dipped overall in challenging conditions, the behaviour of those with a more frequent habit was more resilient. Individuals of course need to strike a balance between deeper engagement with sport and the time required for other activities. However, choices that have more flexibility and provided time-efficient opportunities have thrived. Running and gym-based activities, with the potential for relatively short sessions and high flexibility, have always encouraged participation several times a week. Strong growth in both has not changed this picture.

Boxing has seen growth driven by those taking part not once but twice a week. This is an increasingly prominent boxing behaviour, suggesting increasing loyalty/affinity with the sport. However, over 80% of boxers take part in at least one other sport as well, an indicator of a second factor creating more resilient habits – a broader engagement with sport in general.

Regular sporting habits continue to be as likely to include multiple sports as engaging with just one activity. Only half of regular participants are just doing one sport (and that figure is lower still for 16-25s where participation has always been characterised by greater variety and churn).

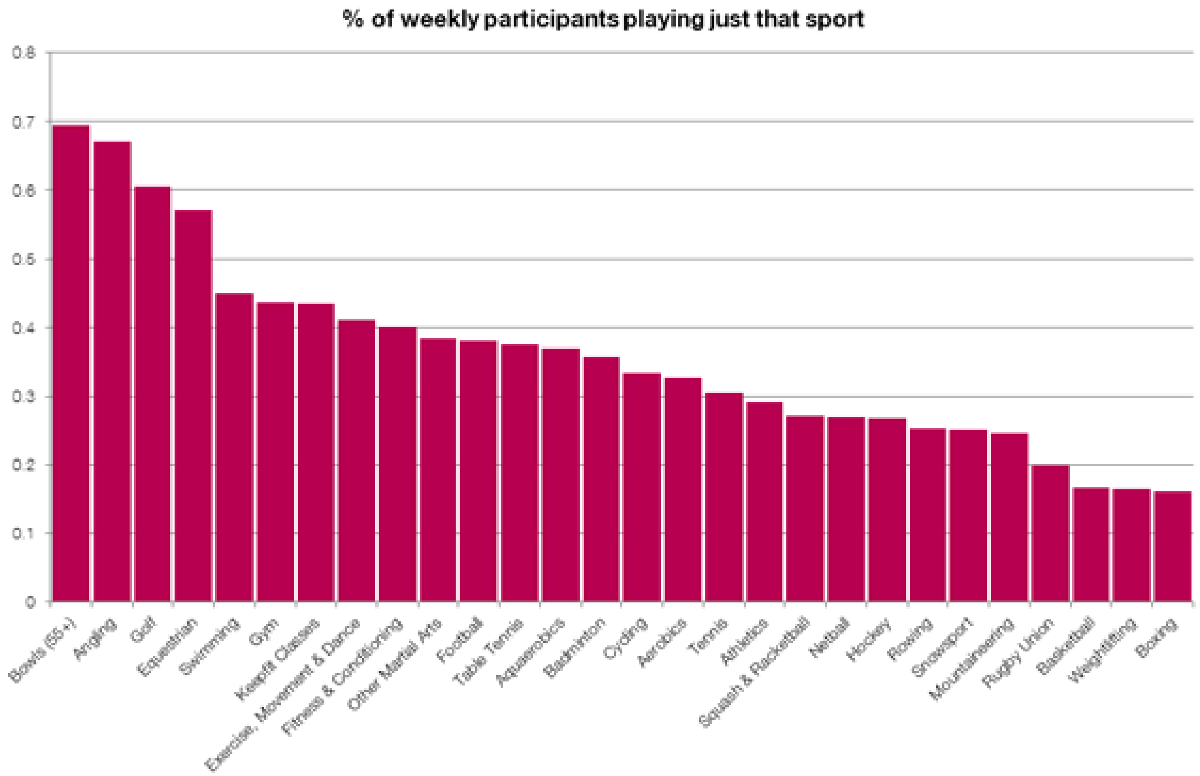
Research into participation among 25-34 year olds has pointed to the importance of an affinity with sport in general rather than any sport in particular in supporting habits later in life. Many of those now active played more than one sport as 11-16 year olds.

The implications of this are that having more than one string to your sporting bow seems to be a valuable part of dealing with interruptions to habit. If someone's main sport is temporarily unavailable or they need a change to avoid the experience becoming stale, bridging the gap with other sport-related activity may be helping to sustain overall habits.

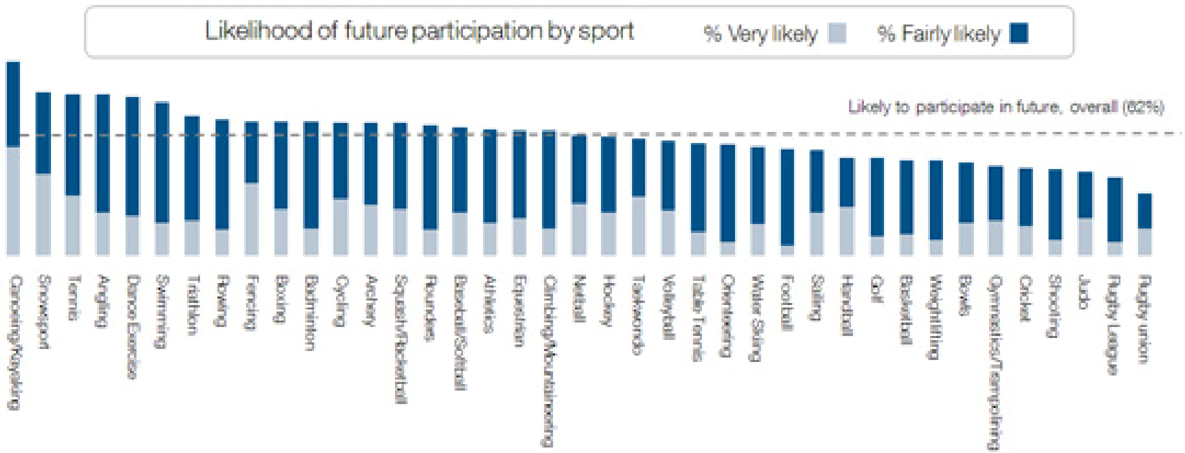


Mass participation events have encouraged some to a focused burst of engagement in running, rather than a sustained habit. At any one moment an average half a million "eventers" are not currently running. However, two-thirds are active in another sport, suggesting such events are playing a key role in the overall sporting experience of the habitual participant.

Single-sport participation gives some cause for concern. Sports with the highest proportion of participants doing only that activity (e.g. bowls, golf, swimming and equestrian) have all seen participation decrease. A single sport focus is a potentially more vulnerable form of sporting habit.



Likelihood of future participation

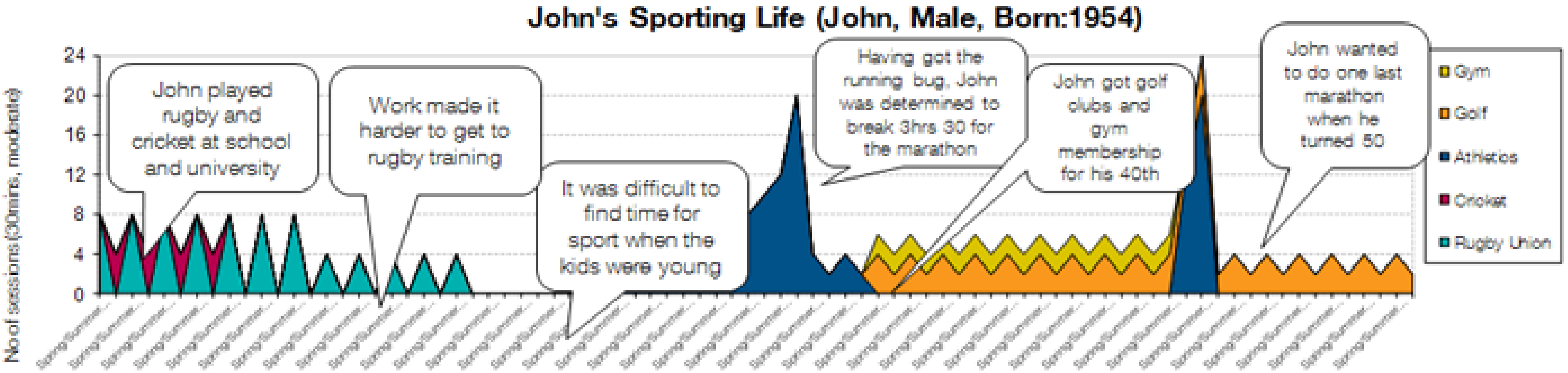


Number of participants at each level: Overall (1,468), General Participants (1,046), Club Members (422)

For team sports, two different patterns are emerging. Rugby Union players remain more likely to be involved in other sports, suggesting a greater pressure on their time as participation has dropped across all frequencies. By contrast, hockey players have reduced their multi-sport habits, and in some cases increased frequency of participation. This suggests hockey is successfully bucking the trend for less commitment and is "binding them" into the sport.

Sport has not traditionally catered well for adults wanting to take up new sports. With an ever-diminishing stock of sports perceived to be available to people as they age, the risk is that something non-sporty fills a temporary gap in people's lives and squeezes out the time for sport.

The challenge is to understand how target customers want to be presented with multi-sport offers, and whether they want regular choice, variety across the year or an occasional alternative. It also means doing more to support people's transition between sports. In research, 11% of women and 12% of men cite taking up another sport as the reason for leaving their current one (higher than the proportion noting the impact of wider competing leisure interests (7% of men and 6% of women). This demonstrates it is rare that sports are fighting over participants making an either/or decision.



It is clear that a sporting habit for life may have different phases and behaviours along the way. The likelihood of returning to different sports varies, but is particularly low for those with a strong age drop-off profile such as rugby. However, some sports clearly benefit. Running, cycling and swimming each pick up 27% of those who drop out of one sport but retain an overall sporting habit by transitioning to another.

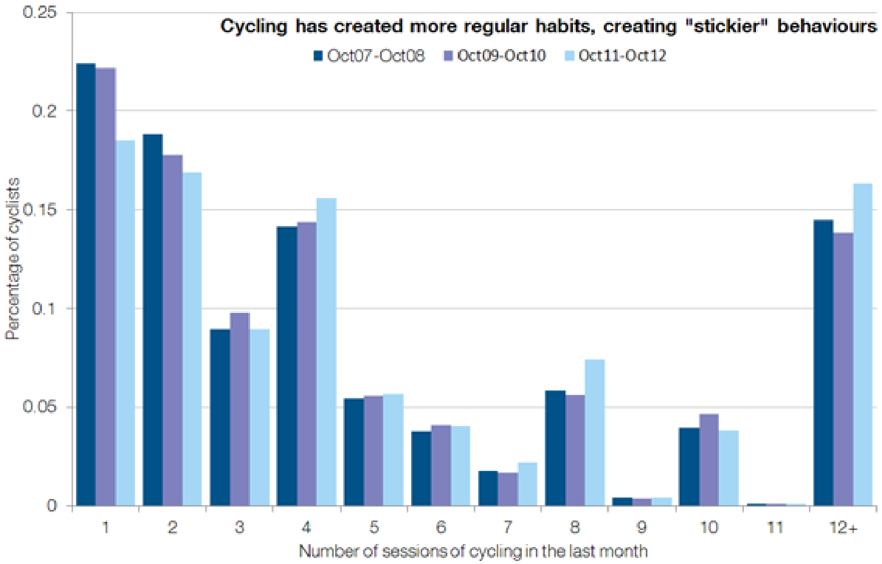
Transition points are an ideal opportunity to create new habits

Many people participating in sport don't make a regular habit of it. For example, swimming enjoys a peak in the summer, linked to participation on holiday. However, contrary to other sports, interest in the activity among those who are not participating booms in the months that follow, rather than during the lead-up. This suggests that short-term enjoyment, no doubt linked to the environment and relaxed atmosphere, has not helped to establish a habit on the return to normality.

Cycling has managed to create "stickier" habits – first by attracting more people on to their bikes through SkyRide (over 1m more cyclists) but then helping them to convert this behaviour into a more regular habit to sustain them. Some of this behaviour change has come from simply helping these participants to see that regular cycling is something that "people like me" can do.

The same is true of mountaineering, with growth in both regular once a week and twice a week climbing. This has in part been enabled by increases in indoor climbing – an adaptation that allows for a more regular habit through greater accessibility and convenience.

However, the opposite is true of equestrianism, a sport traditionally with a strong spread of regular habits of quite high frequencies (up to every day of the week). It has seen losses across the board for these frequent habits but modest growth among those riding once a fortnight. Some regular habits have been sustained, but at a lower frequency than



69% of 16-24s state life changes as the reason for stopping sport

previously, possibly as people react to pressures on both time and disposable income.

Research shows that 23 per cent of the population report playing more sport than last year, with many building on existing or past engagement rather than starting from scratch. This is reflected in the reasons given for participating more – such as to increase fitness (24%) or just because they enjoy it (9%) – which tend to be motivations that reinforce rather than activate habits. This is why sports such as netball have achieved success with 'back to' programmes, making it easier for participants with past experience to return and try it again. The first experience is focused on fun and fitness. Over time it then evolves to meet the demand to start improving skills and even playing in informal competitions.

However, following a steady decline in the number of 16-year-olds sticking with sport, there is also an increasing need to help create new habits among the adult population. Although traditionally seen as a challenge, life transitions can also be an opportunity. New habits can be established in the same way that old ones are broken. Signing up for an event or club membership can create a commitment to regular participation.

Similarly, moving to university or a new area is an opportunity to create a new series of habits. Rather than leaving participants to re-form new habits by themselves, successful organisations – outside as well as inside sport – are thinking differently about how to engage with and respond to target customers. Utility companies thrive on these transition points. British Gas, for example, has seen success in targeting these moments of change to introduce new customers to their wider range of services.

In summary...

- There are many different sporting habits – how often people participate varies from year to year and hence retention can't be taken for granted
- A regular habit doesn't necessarily mean weekly – success will come from helping people who experience sport to adopt a regular and frequent habit
- Short-term interruptions threaten long-term participation habits – growth will come from minimising the proportion of people for whom short-term interruptions become a more significant lapse in participation
- Life transitions remain the dominant reason people leave sport – cultivating a love of sport at a younger age creates participants who are more resilient to these changes
- It's rare that sports fight over the same customer making an either/or decision – regular sporting habits are just as likely to include more than one sport because many consumers are choosing multiple sports to help them sustain a sporting habit
- Transition points are an ideal opportunity to create new habits – successfully creating regular participation habits will require sports to thrive on rather than fear life transition points

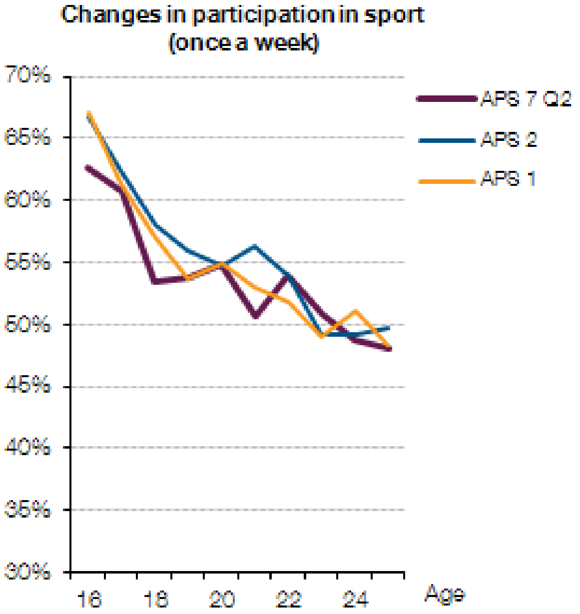
Chapter 3 – is sport for all?

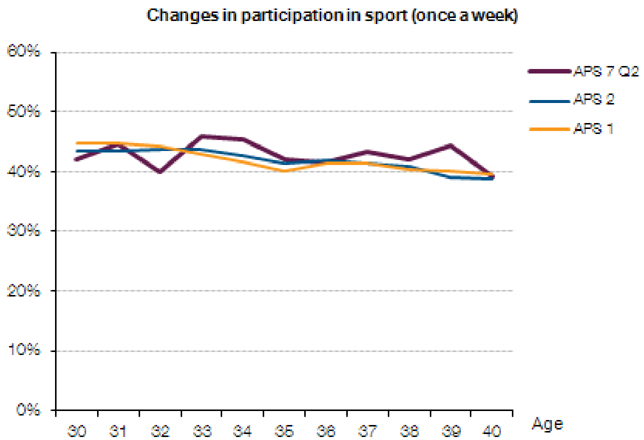
Chapter 2 demonstrated the current habits across sport, but this is only half the story. Sporting habits are based on making choices, not just choices between sports but also choices between sport, other leisure activities and wider lifestyle needs. The nature and implications of these choices are as variable as the habits they create. The constant is the need to know your current and potential customers and what it takes to persuade them to play more regularly.

This chapter explores some of the choices different groups are making, focusing on four key demographics where participation has been challenging/changing and where opportunities for growth are high and where it's critical to capture demand. We look at the choices and expectations of young people, women, BME communities and those with a disability; and explore the challenges they face in developing and maintaining sporting habits.

While overall demand for sport is growing, this demand isn't homogenous and the motivations to participate are different for every individual. Although on average 15.3 million people are playing sport at least once a week, 1.4 million up on 2005 when the bid was won, the changes in participation among different audiences have not been uniform. Sport continues to answer the needs of some groups more effectively than others.

Participation patterns are changing across age bands





Although the participation rate for different ages has fluctuated over time, the habits of more people are being sustained through their 30s and into their 40s. However, while demand for sport remains strong among young people, across all sports participation continues to drop significantly between 16 and 21, as young people make the transition through education to employment, when greater social and leisure choices become available. The challenge for the sector is creating a proposition that meets the rapidly changing needs of young people.

All sports have different audiences, and these can change over time depending on customer need. The top ten sports overall are not always the top sports for particular age groups: for instance, the peak age for a gymnast is eight years old, while 82% of golfers are over the age of 35. Lacrosse has identified that these age-based transitions have increased the market of people that can be attracted into new behaviours. The sport's NGB has seen real growth in higher education by tapping into the demand for an adult beginner offer for sporty youngsters looking for an option that isn't a traditional university team sport, such as rugby, netball or hockey.

The Sportivate programme for 14-25 year-olds launched in June 2011 is built on listening to what young people want from sport and then giving them great opportunities to get involved. Research shows this approach is succeeding, with most of the young people sticking with sport three months after they have completed the Sportivate course. As a result, the sports in demand range from judo and tennis to wakeboarding and parkour.

Over time the big four sports of athletics, cycling, football and swimming dominate. However the relative popularity of sporting choices for younger age groups is a more complicated picture. This shows that sports can capture the imagination of a particular age group but still engage less well with those a year younger or older. However once participants get into their mid-30s the choices become more stable from year to year.

12 million women say they want to do more sport

Sport continues to be seen as more relevant to men, in terms of its presentation and response to people's needs. Although there is high demand among women (particularly among those who are inactive and also among mothers) most of them have traditionally been quite ambivalent towards sport. Women are still much less likely to be active than men. Currently 40.1% of men play sport at least once a week, compared to 30.5% of women.

Since the 2012 Games there have been some signs of change, with increased participation and demand from women. With 12m women nationally telling us that they want to do more sport and over half of these currently inactive, girls and women are the biggest growth opportunity.

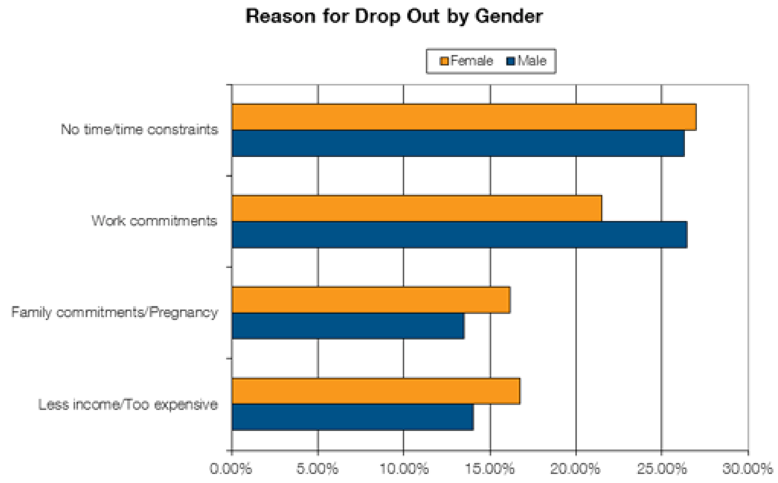
However, sport has yet to translate this demand into activity because it hasn't yet dealt adequately with the key barriers to participation. These barriers include a lack of confidence, lack of time and money and the inability of the coach or session leader to understand how to interact successfully with women and girls.

As with any demographic group, demand and expectations are not uniform. Women and girls who are really engaged in sport often exhibit behaviours close to those we consider belonging to sporty boys and men. The main driver for female sporting participation stated by all levels of female athletes from entry level to elite is "to have fun".

The needs and expectations for competition also vary, with strong demand for opportunities for achieving something less tangible than victory, such as beating a personal best time in a local event.

The untapped demand for female participation is more for what we could consider 'entry level' sports such as running, cycling and swimming. This finding supports the desire for a sport with a gentler entry with less overt competition at first. Key to understanding the demand for female participation is that for women, much more than men, time is a barrier because they often feel more responsible for childcare.

Success in harnessing this demand will be based on asking women what they want. A lot of work has been done in understanding how to overcome the barriers as part of the pilot programme launched in Bury earlier this year. This pilot will look at the stages of behaviour change and how to ensure that attitudes to women and sport are changed as part of a hearts and minds campaign to make sport for women a more natural choice. It aims to make it easier and more appealing for women and girls in the town to take up sport, by making it a place where playing sport comes naturally. Responding to local demand requires a focus on a clearly defined geographical area and community.



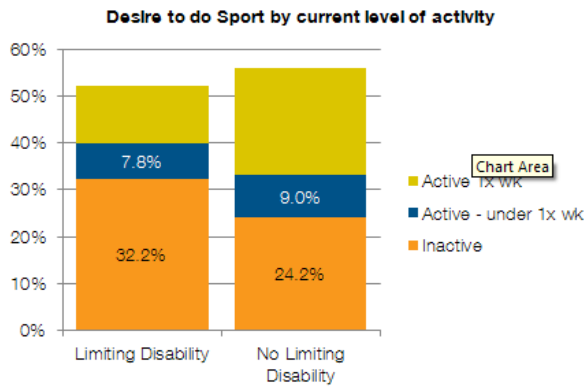
Women, more than any other group, are looking to participate with a group of people like them. This doesn't mean they are physically similar; it's rather a desire to find something in common with other participants that helps strongly with retention. Groups such as Pram Push Fitness are seeing great success by letting new mums run and exercise together with their buggies. Mothers feel confident in the activity level and find the time to go, as they do not have the issue of childcare or the guilt of leaving their child with a sitter. In the rain in Bury some mums did the exercises in wellies – for participants, wearing comfortable clothes is more important than branding. In being part of a social group the notion of activity becomes the norm, and women do not feel they are doing something out of the ordinary by being sporty.

As confidence is an issue for many groups, especially women and those from lower earning income households, the experience of the first sporting experience is absolutely key. Once individuals find the nerve to turn up for a session, they need to be welcomed and encouraged. If it doesn't feel like it will meet their needs, people may well not come back. A big part of the British Mountaineering Council's coach training through the National Sport Centre at Plas y Brenin is that making individuals feel welcome and comfortable is initially more important than launching into teaching them how to climb.

Participation rates vary considerably between impairment groups

When Sport England launched the 2012-17 Youth and Community Strategy in January 2012 increasing participation by disabled people became a key outcome. The strong demand to participate is slowly being matched by the supply, and the past 12 months in particular have seen a strong increase in the number of young disabled people taking part weekly.

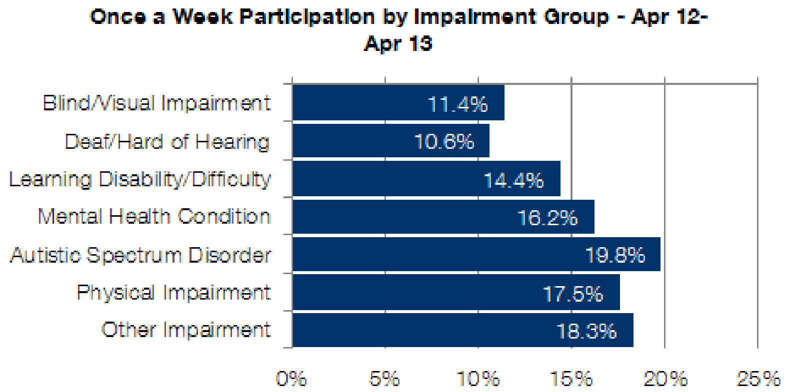
The participation of disabled participants has shown a steady increase since the announcement of the 2012 winning bid. This means that while the difference between the proportion of disabled and non-disabled people who play sport is still unacceptable, the gap has narrowed: in 2006 the gap was 22.7% and in 2013 it is now at 20.5%.



Latent demand remains very high, with over half of those with a disability wanting to do more sport. Demand from the currently inactive population is particularly high, with 8% more disabled people wanting to do more sport vs. those with no disability. As the 13-17 NGB funding awards demonstrate, there is now a real appetite from the NGBs to start providing specific and inclusive sporting opportunities. Delivering these plans quickly will be important, as current supply is unable to meet the high demand.

In understanding the participation of disabled individuals, it is essential to realise that they are not a homogenous group. Different impairment groups have different demands for both inclusive and specific delivery.

There are several examples of using different elements of the inclusion spectrum to include disabled people in sports activity of their choice, at a level of their choice. These range from fully inclusive activities, modified activities, parallel activities, adapted activities (reverse integration) and discrete activities (segregated, disability-specific activities). This enables disabled people to participate at levels of activity that are appropriate to them.

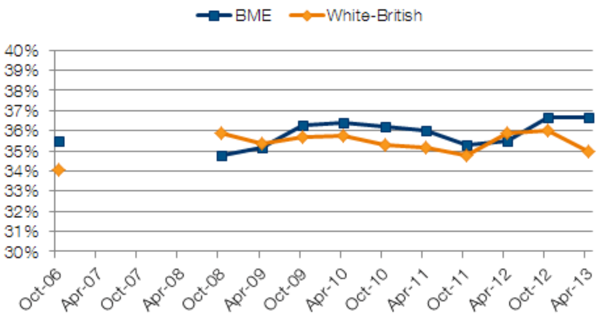


For example, the England Squash and Racketball Association have put into place deaf squash, a product with little adaption required to meet a specific need. The LTA has prioritised four impairment groups (deaf, visually impaired, learning difficulty and wheelchair) that require different levels of adaption while still contributing to their overall vision for tennis to be inclusive and accessible to all. England Athletics has committed to an increase in participation of 40,000 over four years through successful inclusive programmes.

Overall, Sport England is providing around £6.5 million in funding 15 NGBs to deliver dedicated disability programmes. There are a further 23 NGBs who are delivering inclusive programmes. To help support disability sports offers, the NGB 13-17 investment also included £5.2 million to the NGBs of four Paralympic sports (boccia; goalball; wheelchair basketball; and wheelchair rugby) and all four of the Paralympic NGBs have seen an increase in demand since the Games.

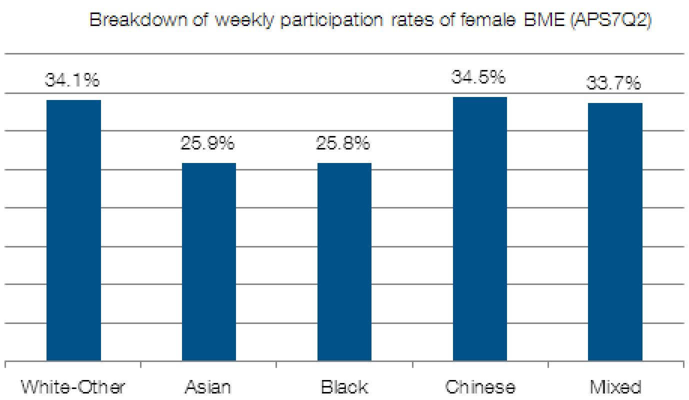
BME is a growing but complex market

Participation from those from a BME background has seen strong increases in the past 12 months. Basketball, athletics and netball are the top growth sports here, with an increased profile of athletes from a BME background in the Games driving demand in basketball and athletics.



Although as a global group BME is over-represented in participation terms, within this positive story there is a significant variation. The three groups who are especially underrepresented in sport participation terms are black and Asian females and Chinese men. Each group has a range of perceptions, motivations and expectations, making it harder for sports providers to deliver a relevant range of opportunities.

Facilities and services may also need to be designed in ways that resolve potential faith or cultural barriers. For example, the offer of female-only swimming sessions has proved popular with Muslim women. There are also opportunities to support delivery within the facilities that different communities already use, rather than expecting them to travel as a group to existing sports facilities.

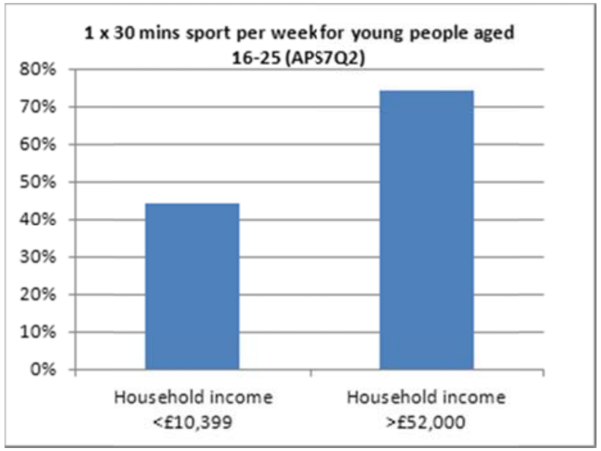


Supporting and growing participation could mean looking to support existing participation, rather than trying to draw the participants into more formal structures. For example, the ECB knows there are groups of South East Asian players who organise their own cricket matches on local pitches. They don't want to be part of any formal structures, as they've created a format that works best for them – including continuing to play in the rain. The ECB can therefore contribute to sustaining this participation by ensuring the pitches they use have good drainage.

Demand for sport is more consistent across socio-economic groups than the current supply

Participation in sport is substantially lower among those from a lower socio-economic background (almost 15% lower than for the highest groups). However, this stark difference is not reflected in the desire to participate in sport, which is more evenly matched across different socio-economic groups. It is clear that sport as a whole is failing to provide enough of an attractive, accessible offer to more economically deprived people. As a result, this is a key driver for many local authorities.

Kickz and Street Games have found a combination of barriers for this group that go beyond those typically faced by young people. These include convenience, cost, and a lack of confidence (in their ability and their body). From a recent report by Street Games, 23% of those surveyed stated they were "not confident enough to take part." However most respondents were interested in participating in some form of sport or activity both now and in the future.



This demand from individuals in low earning households has been successfully met when the sport has been taken to them in their territory or area. Street Games takes its sporting offer to the doorstep of the young people and empowers them to choose an activity.

Like all young people they have busy lives, and a strong social pull can be a distraction; but what's different with youngsters from lower income households is that 40% of the young females and 31% of the young males surveyed (Street Games Diva research 2013 "Background Fact for Doorstep Sport") had never taken part in an after-school sports club.

While the needs may vary, the approach to successfully overcoming these barriers is the same. Street Games finds ways to overcome the traditional barriers, asking young people what their needs are and then helping them to shape their own sporting solution. One such offer developed alongside the target audience is street golf. Street golf is played in an urban environment close to home rather than on the golf course. The course is designed by young people for young people and then taken to them in an environment in which they feel safe. Sport-specific sessions aren't always required, as local research shows that affordability of sessions and ease of access are sometimes more important than the sport itself.

Another organisation that has been very successful in reaching out to the younger market living in areas of inequality is Kickz, the Premier League's programme that uses football to bring communities together. To tap into the local need, Kickz coordinators will often join youth outreach patrols to meet and invite young people to come and participate in programmes.

Sport is taken to the participants at a time they choose, which means the demand for weekend evenings is high as it also fits in with their social needs. As a result, while local authority statistics suggest less than 5% of sport is delivered on Friday and Saturday evenings, these two nights account for over 40% of all Kickz contact hours. The ripple effect of deliberate schemes like this is that it can sometimes stop the target participants being drawn into negative habits, such as drinking, drugs, anti-social behaviour or crime.

Kickz motivates young people not previously engaged in sport through the power of the Premier League Brand and by allowing young people to have a significant say in the way sessions are run.

Participants want to play with people of a similar skill level

Variations in demand between different groups are not only dependent on the commonly cited motivations of fun, social experience or weight loss. It's also necessary to take into account the differing sporting experiences and skills levels of participants.

Initially, the hook can be about an accessible and non-judgemental entry point, where people won't feel silly or out of place. British Cycling has capitalised on this, with the Sky Ride local programme. Research from British Cycling showed that the national Sky Ride programme worked very well and raised awareness and interest in riding locally. Sky Ride Local allows individuals to sign up to rides in their vicinity and they can sort this by numerous behavioural categories allowing tailoring of the standard offer. Parents can choose to ride with their children, women can pick female-only rides, and most importantly the routes are self-selecting as people sign up to rides labelled "challenging", "steady" or "easy-going." Signing up to the "easy-going" routes can be compared to skiing down a green run: people are confident their skill level matches the challenge and are reassured they will be with others like them. British Cycling regularly reviews feedback to check its insights remain correct.

The Sportivate programme targets the semi-sporty teen and those up to age 25. Its success has been built on listening to what young people want from sport and then giving them great opportunities to get involved. The behaviour of these individuals is similar, in that they are not keen sports people and need to be motivated into activity by an offer that is less traditional. The appeal is that whatever the sport or activity, the young person is likely to be with others who are at the same level or ability and so the level playing field inspires confidence.

Sportivate empowers young people to choose their own slightly different sport and so the groups are usually groups of people trying something new together. This allows those whom we would not consider to be the sportiest members of society to be tempted into activity as a fun and social way to spend their time, rather than as a sport with a traditional or competitive focus. Such has been the success that an additional £10m per year of funding has been invested to allow the programme to run until March 2017, and from September 2013 it will be extended so that 11-13 year-olds can also take part.

Sport England is working with new partners and investing in innovative ideas to offer people the chance to get into sport in ways that most suit their needs and aspirations. For example, the fully inclusive School Games provides a great way for young people to discover new sports in a friendly environment. It will increase the opportunities for young people to take part in sport across the school year via local class-versus-class sport sessions, school versus-school competitions and county-wide sports festivals.

In summary…

- Participation patterns are changing across age groups
- 12 million women say they want to do more sport – unlocking the big growth opportunities among women requires offers that enable women to participate with people with whom they have something in common
- Participation rates vary considerably between impairment groups – different impairment groups have different needs across the spectrum of inclusive to dedicated delivery. These needs can be met by developing sustainable links between the disability and sport sectors.
- BME is a growing but complex market – success comes from using insight to create relevant offers tailored to the needs and expectations of different groups
- Demand for sport is more consistent across socio-economic groups than current supply – making sport easier to choose includes taking customised sports offers to the doorsteps of young people
- Answering varied needs under one banner – successful offers are easy for people to try, and yet varied enough to support the participants evolving needs

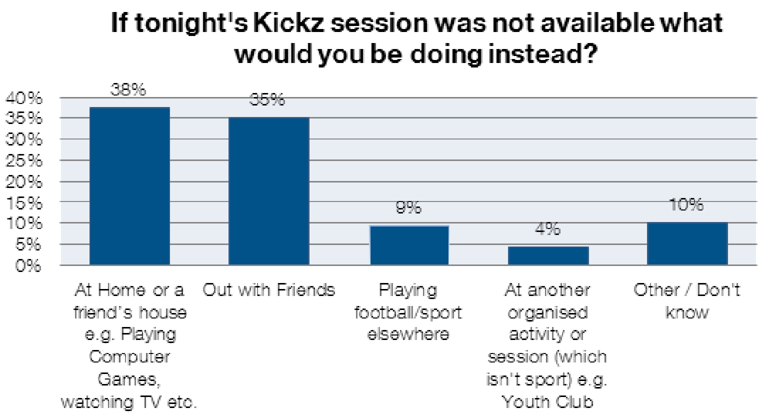
Chapter 4 – consumer choices in a mixed economy

Sporting habits are dependent on making choices – not just choices between sporting activities but also choices between sport, other leisure activities and wider lifestyle needs. The nature and implications of the choices are as variable as the habits they help create. In this chapter we look at ways in which sport can be presented as a viable consumer choice by incorporating the lessons already learned about capturing interest and changing behaviours. These lessons have been drawn from across a range of public, not-for-profit and commercial providers that form the 'mixed economy' of sports delivery.

Sport is a complicated and fragmented market, where local needs and the priorities of individual organisations dominate. Priorities range from a focus on underrepresented groups through to finding and developing talent. Meeting the diverse needs of stakeholders and the population has led to a rich variety of delivery but not always to economies of scale. The landscape of choices is often both confusing for the consumer and poorly communicated. Faced with a multiplicity of opportunities, most consumers are choosing the easiest option to meet their social and leisure needs. The problem is that the choice is often something other than sport.

Sport doesn't have a monopoly on being fun and social

People are increasingly expecting to be given exactly what they want and businesses are responding with a greater depth of personalisation. For the consumer, a regular fix of sport can bring many different benefits that reflect their diverse needs and motivations, not least around social gathering, personal achievement, enjoyment, health improvement and skill development. However, in providing many of these sport is not unique.



The area in which all types of participants (including club and elite) find the most satisfaction through their sport is the "release and diversion from everyday life" it brings. Those who have already chosen sport may agree it is fun and social, but others can equally be satisfied that these needs are served by a family day out, evenings in the pub or cinema or late-night sessions on internet-enabled gaming consoles.

Sports are not just competing with other sports. When the Kickz programme asked 14-19 year olds what they would do if their sport session were no longer on, over two-thirds said they would spend the time just with friends rather than at another sporting session (<10%).

To be on the shopping list of activities to fill someone's time and build the potential to create a sporting habit, a sport needs to stand for something – and it needs to use those values to get people interested and excited. England Netball has embedded the philosophy of building its offer around what participants want and need, under the "I heart Netball" brand that reflects the desire, particularly among the key audience of young women, to feel part of the netball family.

A strong brand can develop loyalty by maintaining engagement even when people are not currently playing the sport. Swimmers and cyclists don't feel as though they have ever left the sport even when they stop participating – they have the basic skill and could take it up again tomorrow if the fancy takes them. Rugby diehards express a continuing desire to play their sport into their 50s, even when there is little prospect of them actually doing so.

Growth comes from making sport easy to choose

The volume of choices and offers already within sport is no guarantee that the right solutions exist for the range of different audiences explored in the previous chapters. Indeed, as the world of sport understands more of its own insight, it is becoming increasingly clear that for many people an appropriate offer is not yet available.

For example, sport continues to offer relatively few viable opportunities for those who are less confident in their general sporting literacy to take up a new activity as an adult. The high levels of expressed interest in a wide range of sports and the localised success of programmes such as Active Villages suggests there is a significant potential market for this type of flexible offer. The Active Villages programme run by Suffolk Sport has focused on taking sport to local rural communities, to break down the perceived barriers associated with travelling to try out new activities. By creating very local delivery, the programme is encouraging trial and then retention through providing an experience that supports getting to know your neighbours while getting healthier through sport.

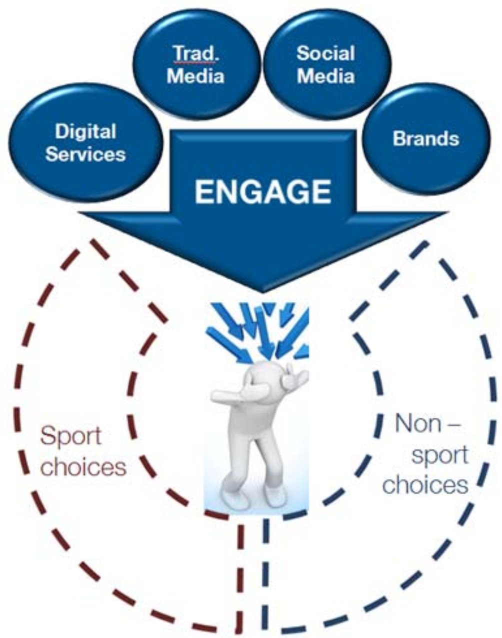
Many sporting activities are being successfully adapted to fit better into the wider lifestyles of their target audiences. The goal is simple – reduce the level of commitment required from people and maximise the flexibility with which they can find time for sport. Gyms offer a range of classes with flexible start times, many of them now shortened to a quick burst that fits into a lunch hour. Home Run combines the need to commute home with the opportunity to run with a group. Table tennis is increasingly to be found in ping pong parlours, trendy bars, shopping centres and parks rather than just at leisure centres. DIY kits now enable customers to convert any table into a chance to play. As a result the sport is able to create scale through consistency of execution while still meeting customer needs.

A common factor in all these developments is helping to make repeatedly choosing sport easier for people by lowering the barriers to entry from skills, location or timing. Older teenagers, a key target group for many sports, continue to drop away from sport at a concerning rate. They are at a stage in their lives where they are increasing in independence and where they are confronted with a wide range of choices. However, with independence comes the burden of looking after themselves, such as organising their own travel, paying for leisure pursuits themselves, even organising the means to meet and spend time with peers. Many want to choose what they do, but would prefer someone else to pick up at least some of the inherent difficulties for them.

Adventure racing has exploded, led by major international brands such as Tough Mudder which is providing consumers with extreme but high quality experiences. However, not all such developments will necessarily support sustained growth. There is an increasing tendency towards concept-led event provision. Recent entrants to the market include Electric Run, using lights, music and post-race drinks and the Dulux backed Color Run. Although the great experiences are proving popular, they are not necessarily habit-forming, unlike parkrun, which delivers the combination of consistency, accessibility and flexibility. It is vital to strike the right balance of giving customers what they want but remembering to frame it in the overall context of supporting changes in their behaviour.

Sport is still all about the people

Sport doesn't just happen. It needs people to make it happen and to deliver a compelling customer experience. Therefore at the heart of the choices people make and the experiences they have are the people they encounter. The coach, activator, organiser, volunteer and personal trainer are the keystones in creating environments and experiences that reinforce habits. Other parts of the workforce play their part too, from the welcoming staff at a reception desk to the committee members running a local marketing campaign.



Inspired by the volunteering legacy of London 2012 over 40,000 people have now become Sport Makers. This programme provides opportunities for people to help their friends get involved in sport while developing and applying their own skills. Many universities and colleges have created voluntary student activator roles that help to deliver social sport sessions. As well as the enjoyment of providing additional sports opportunities, the benefits to the student activators include the opportunity to add experience to their CV and to get support for their sporting commitments. The growth of recreational 'activator' roles is demonstrating that not only is delivery evolving to meet the needs of participants but it's also evolving to meet the needs of the volunteers that keep it moving.

British Military Fitness has used a "different" type of workforce to create a new experience, centred on both the individual leading the group and the dynamics of the group itself. Over 800 instructors, all serving or former members of the armed forces, are now running 400 classes a week in over 100 parks for over 20,000 members.

Access to personalised information helps create stronger habits

Grassroots sport has traditionally focused on supply – building places, training people, putting on programmes. Although this supply has begun to adapt to the expressed needs of the end user, engagement remains a largely one-way process. In the past our sector built things; now we ask what people want and then create offers. With greater customer understanding is coming a greater awareness of how to reach and communicate with the different audiences and the importance of engaging with them, not just pushing products to them. Much of what is offered remains largely hidden, particularly to communities currently outside sport. However, the greatest successes in sports participation terms, from the growth of mass participation running to Sky Ride, have come from speaking to a wider audience with a compelling series of stories and offers.

Traditional media remains an important part of this mix. For example, engagement with the BBC has significantly increased customer awareness through powerful story-telling. However, the greatest opportunity lies in digital platforms. At the heart of the pan-sport Spogo programme, alongside individual success stories like Splashpath and the LTA's AllPlay, lies a commitment to providing the information that consumers want and need to make choosing sport easier. Similarly, Runkeeper uses social media to keep participants engaged between participation sessions. There is a strong balance between the core provider content and the richer engagement from the user-generated material.

There is also a growing number of commercial organisations and brands interested in supporting and working with grassroots sport. Partly this is a result of the home Olympics, but also the increasing awareness of the reach and value of community sport through the success of partnerships such as British Cycling's with Sky. This presents a fantastic opportunity to take advantage of these organisations' reach and of their ability to engage and inspire consumers. In turn this will create more of the seamlessly connected, coherent offers that are the bedrock of sustained behaviour change.

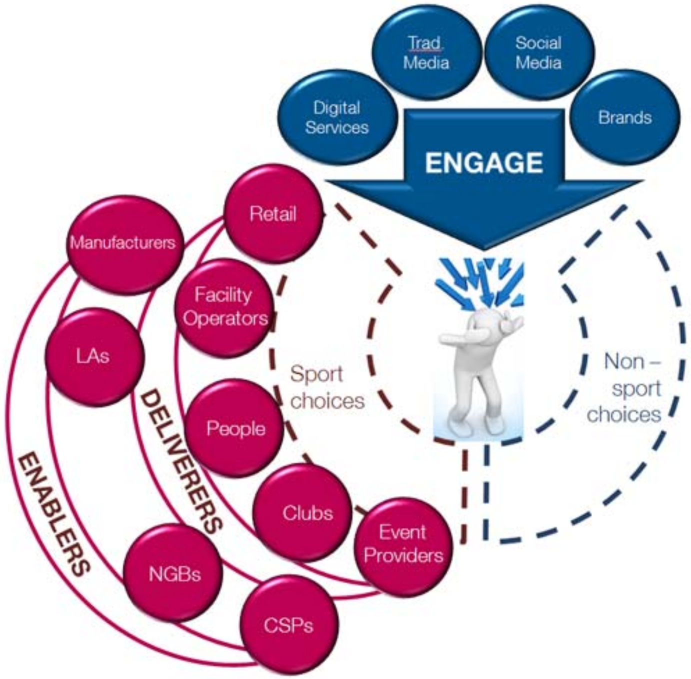
However, this means systematically linking together the key stages of a behaviour change programme – from the development of behavioural insights to evidence-based planning, through design and delivery of communications and offers, to evaluation and continuous refinement. By following this model, Sky Ride has enabled British Cycling and its partners to respond to the feedback from a range of communications and offers to move people from awareness to a regular cycling habit.

Changing behaviour is partly providing compelling reasons to take part and partly about helping individuals to understand their own habits. The accessibility of personal data and innovations around wearable technology could be key. Organisations such as WeightWatchers have known for many years that people are more likely to change their behaviour (usually for the better) when they are monitored and supported. This effect is seen in many gyms by the difference in effort people put in when their personal trainer is and isn't there. At an individual level, training diaries have helped elite athletes measure actual rather than perceived behaviours, and it is this personal accountability that technology is now bringing to the masses.

Jawbone UP, Fitbit, Nike Fuelband and Nike+ and many other applications make it very easy for participants in a range of sports to see exactly how much they have done and how often they really do it. The personalised feedback loops provided by this data can become a powerful motivator. Nike once calculated that the magic number of uploads to Nike+ was 5. When people reached that number they had become hooked on what their data could tell them, and hence were significantly more likely to keep running and uploading. As these technologies become more mainstream, the world of sport has a significant opportunity to use it to change and reinforce more regular sporting habits.

The mixed economy continues to grow, and work together

Continuing to create and convert interest into a regular habit will require a range of public, not-for-profit and commercial providers. This 'mixed economy' of delivery will ensure that evolving consumer needs are met by innovative and flexible providers. These providers must collectively be able to help participants establish and maintain a sporting habit for life.



Sport is a complex mixed economy and NGBs need to bring together partners from across their sport if they are to achieve sustained growth in participation. Football has long since ceased to be a solely 11-a-side game, with small-sided football now more prevalent. Just one provider in this space, Powerleague, now has more than 130,000 players using 470 pitches each week for formal competition and informal games with their mates. As the sector starts to communicate better with itself, different providers are developing a better understanding of the needs and priorities of potential partners (both traditional and non-traditional). This is the first step to the type of effective relationships that result in a seamless offer for consumers rather than a confused landscape.

The health and fitness market has shown strong and resilient growth, with market penetration of memberships now at its highest level at 12.6%, despite the wider social and economic context. However, this overall growth disguises the shift happening within the market, with a 94% growth in low cost (budget) clubs between March 2012 and March 2013, providing a squeeze in the middle of the market. Memberships are the key revenue driver for public leisure facilities, but competing on price alone will not prove successful. However, partnerships between public leisure provision and sport, including NGBs, can create increased value for customers through greater variety and quality of experiences. Approaches such as Badminton England's Play Badminton framework are good examples of how NGBs can respond.

Local authorities are increasingly looking to sport to support other policy priorities, such as deprivation or health, as they are no longer able to just fund sport for sport's sake. This shift in focus could lead to NGBs and local authorities having different target audiences in mind for local delivery, thereby creating a need to find common ground. County sport partnerships continue to have an important role here, through their ability to connect and coordinate partners at a local level.

However, meeting the needs of one agency doesn't have to be one-sided. For example, although personal trainers (PTs) now have to pay to use Paddington Recreation Ground (a possibly inevitable consequence of the tight squeeze on local authority budgets), Westminster Council has introduced an innovative solution. PTs receive a 50% reduction if they sign up to the Park Maker programme and provide an hour's free activity for every hour they do client work in the park. The offer for local residents has therefore improved, but there is also a bigger, immediately accessible, recruitment pool for PTs. Some of the successful cross-selling ethos of the gym environment has thus entered parks, beyond the creation of outdoor equipment.

Consumers expect a seamless offer across providers

Several NGBs have already had success in working hand-in-glove across this mixed economy, not least British Triathlon in its relationship with event providers, and the ECB's partnership with Last Man Stands. The experience of several NGBs has also revealed the importance not only of working with partner organisations but also supporting subsequent delivery. For example, the general manager of an individual leisure centre is constantly juggling local priorities and context with the need to meet business targets. Therefore meeting local needs is as important to sport delivery as building partnerships with executives of the key leisure operators.

The BCU's Go Canoeing brand is the consumer face of a strong and growing network of partnerships and relationships. The NGB identified a range of contact points for consumers considering taking part in canoeing. It has worked with manufacturers in the trade to influence the retail channel, including broadening the base to include more mainstream retailers such as Argos and Tesco. This is creating more of a mass-market opportunity.

The BCU has also developed links with a range of canoeing providers to support an expansion in the opportunities and choices for the consumer, for example tours and events. This is driven by the NGB's understanding of the motivations of potential canoeists, including an interest in the outdoors, exercise and release, a need for flexibility and a desire to participate with their own family and friends rather than joining a pre-arranged group.

The impetus to use participation in sport is not only coming from those whose first priority is delivery. Specialist retail stores such as bike and running shops have started targeting greater connections to their shops by making the most of their communities of interest. Many now organise training groups that keep their customers engaged by starting training sessions from their store (eg SweatShop).

Commercial and other providers from outside sport are seeing opportunities to expand into sport provision. For example, the National Trust is expanding the sporting offer available on its properties to provide another reason for visitors to come back regularly, creating an alignment with sport's desire for stronger habits. The charity sector continues to use sport to achieve its fundraising goals. Its drive to keep people engaged and looking for their next challenge means events and opportunities are evolving to keep the challenge fresh and interesting. New, exciting and fresh experiences can only be good for stopping habits becoming stale.

In summary…

- The changing face of provision continues to develop a 'mixed economy' of sports delivery – growth continues to be delivered by organisations and programmes that fully understand the needs of their target customers and make it easy for them to choose sport
- Sport doesn't have a monopoly on being fun and social – offering a fun experience is not enough as many sporting offers are competing for attention with a range of wider leisure and lifestyle alternatives.
- Growth comes from making sport easy to choose –increasing the flexibility/choices available reduces the level of perceived commitment and helps to maintain regular habits
- Sport is still all about the people – success comes from having enough of the right people able to deliver the right experience for the target audience
- Access to personalised information helps create stronger habits – making information accessible where and when people want it, is crucial to making is easy for them to keep choosing sport. Easy access to data can influence behaviour through creating personalised feedback loops that create additional motivation
- The mixed economy continues to grow, and work together – partnerships can create new value for customers through providing greater variety of quality and connected experiences
- Consumers expect a seamless offer across providers – creating a network of engaged partners enables NGBs to increase the scale of delivery across their sport

Chapter 5 – succeeding in a complex landscape

The sporting habits, choices and evolving delivery discussed in the previous chapter demonstrate the complex landscape of sport. However, opportunities for growth in participation still exist for many sports and in many different locations. Unlocking these opportunities requires a different approach, one that is firmly anchored in a deep understanding of current and potential customers.

This chapter provides some examples of how different organisations across the sector have successfully used this insight to develop relevant offers that have changed the behaviour of their target audience. While the case studies don't address all sports or possible challenges, they individually and collectively highlight valuable lessons that the wider sector can also consider applying. The examples are:

- parkrun – creating customer-led growth
- Us Girls – making sport easy to try
- Ping! – treating partners like customers
- Sound Basketball – combining sport with other lifestyle interests
- No Strings Badminton - expanding the reach of social pay and play
- LTA & Tennis Foundation – integrating inclusive tennis

parkrun: creating customer-led growth

parkrun's simple and consistent delivery model now has an average of 27,000 people running 5km at 9am each Saturday morning.

Market gap/opportunity

A gap in the market existed for an informal but regular, distinctive and organised running offer. Advances in technology helped to make it happen.

Offer & routes to market

parkrun offers participants a community-based running event that is more like an organised training run than a scaled-down race. At the heart of this offer is predictable simplicity. Each location offers the same basic format of a weekly, free, 5k timed event. All events set off at 9am on Saturdays and finish with the opportunity to relive the race at a local coffee shop. Barriers to entry are further reduced by using bar code scanning technology to enable registered runners simply to turn up and run at any event in the world. Runners have the flexibility to make last-minute decisions about when and where to participate. Results are emailed the same day and posted on the website with historical results and stats including age group records and age-graded performances.

To encourage runners to keep coming back, regular attendance is made to seem like the 'norm' by offering "clubs" that celebrate it. There's a '50 Club' for runners who've reached 50 runs, a '100 Club', a '250 Club', and a '10 Club' for under-19s. There's also an annual points competition at each event to encourage attendance.

All this is communicated through the weekly email newsletter, social media and the post-run coffee sessions. This systematic communication is a good example of using customer-generated content to reinforce the experience and benefits. parkrun lets its customers do the talking, by sharing their experiences to reinforce the enthusiasm, experience and benefits of the 'parkrun family'.

Growth has not been an overnight success, but with the delivery model now well evolved it is achieving scaling here and around the world. The UK now has 203 locations attracting an average of 136 runners each week. To keep costs to a minimum growth remains organic, always waiting for the public to request a new parkrun location. These events are then organised by local volunteers, who can access a 'parkrun-in-a-box' concept to minimise start-up costs and time spent learning what works.

A deliberate part of the delivery model is the blurring of boundaries between participant and volunteers. To ensure each event has enough volunteers, the requirements and expectations are kept to a minimum and made an integral part of the overall parkrun experience. Demonstrating the simplicity, an 11-year-old has even acted as run director.

The relationship with local clubs faced difficulties in the early days, as clubs didn't understand parkrun's role. However times have changed and now clubs that associate with parkrun are growing their membership. Event providers are also benefiting as parkrun provides new runners with an easy access point to running events.

Things to think about

- Customer experience: a consistent and simple offer can provide participants with the flexibility to make last-minute decisions. For example, how could you provide the convenience of a fun event that caters for the whole family but without taking up the whole day?

- Innovation: rather than trying to modify well-established delivery formats, instead try to reinvent a different part of the sport or current experience.
- Workforce: when delivery hinges on having volunteers to support it, consider how the volunteer experience can mirror the customer experience (e.g. simple and informal).

Us Girls: making sport easy to try

StreetGames' young mums activity sessions in Chorley are attracting new sports participants by breaking down barriers to participation among young mums.

Market gap/opportunity

Young mums attending play sessions at a local children's centre expressed an interest in doing some form of sport or physical activity. However, the cost and availability of childcare was a major barrier to them starting.

Offer & routes to market

Having identified the local market opportunity, the Us Girls team developed daytime multi-sport sessions for the young mums. To make sure they provided what their target audience really wanted, the team took time to talk to the mums to fully understand their exercise concerns and aspirations, their childcare issues and what activities they most wanted to try.

The outcome of these focus groups was a clear understanding of the appropriate skills and experience required by the instructors, and how the activities needed to be structured to deliver a relevant experience that would keep them coming back.

As a result an all-round approach was developed, that started with the mums meeting at the children's centre and walking over to the leisure centre together. Arriving as a group meant they were more confident entering an environment with which they had previously been uncomfortable.

To address the cost barriers staff from the children's centre were made available to look after the children, and the initial sessions were provided free of charge. Demand was driven by promoting the sessions directly to the young mums group, and reinforced by reminders from the children's centre staff before the first session.

The dedicated sessions were delivered within a relaxed environment, and enabled participants to swap between activities at any time. Their chosen sports included trampolining, badminton, inline skating, netball and squash.

To ensure instructors had the required experience and soft skills, the Us Girls team developed 'how-to' guides to explain how to engage specifically with young mums. There was also very practical support for planning sessions based on the expectations and behaviour of the specific participants.

Things to think about

- Customer insight: take time to talk to the potential participants. Understand their needs and expectations about the structure, timing and format of activities as well as the style and experience of the workforce and the facilities used for delivery.

- Customer proposition: while cost is often seen as a barrier, it may not be the cost of the session itself. Look at the related costs of attending the activity such as transport, buying equipment, childcare etc and identify creative ways these costs can be reduced.
- Creative partnerships: make links with the organisations and services that already engage with the target audience. The best environment to reach and engage with target customers may not be sports-specific.

Ping!: treating delivery partners like customers

Over the last three years Ping! has scaled up from 66 tables in London to 392 tables across eight cities, by thinking about delivery partners in the same way as customers.

Market gap/opportunity

Ping! had already proved successful at creating the big experiential participation events. But to achieve scale and sustainable participation it needed to create a business model that met the needs of a range of local delivery partners.

Offer & routes to market

Ping! offers participants attractive and easy ways to play regular ping-pong as part of their social life. Initially based around major investment into a small number of cities, the challenge for Sing London & ETTA became how to find a way of building on this success while achieving a wider scale of impact.

To achieve this the organisations started by identifying its key delivery partners, their needs and their priorities. Local authorities wanted cost-effective activities that reached their communities without using up valuable staff time across sport and leisure departments. Community organisations wanted an easier way to access grant funding and the support for creating delivery plans from scratch.

In response to these needs, ETTA & Sing London created a Ping! Your City package of resources and funding that made it easier for local partners to plan and implement Ping! This package was central to achieving sustainable scale of impact by:

- Including “sales” materials that used existing success stories to engage and enthuse new cities and local partners
- Significantly reducing the amount of hands-on support required by each city. The package provided a suite of online resources such as marketing materials and various how-to guides, enabling each city to learn the lessons of previous delivery. These practical guides included standard SLAs, training resources, volunteer role descriptions and project management checklists.
- Providing the flexibility to meet local needs by being very clear about the aspects of the offer that could be adapted by using local intelligence to bring delivery to life. For example, standard marketing materials made room for local organisations’ logos.
- Minimising the costs for each partner by negotiating and

procuring the equipment centrally. To simplify the funding application process, the package included a partially completed Small Grants application form and guidance to help develop a better delivery plan. This also helped to minimise the time applicants spent securing the funding, enabling them to focus more resources on delivery.

Things to think about

- Partner priorities: understanding the priorities, agenda and constraints of potential delivery partners is vital to making it easy for them to choose to deliver your offer.
- Streamline processes: review all the potential set-up and delivery processes from the perspective of potential partners. How can they be made more efficient, and how can they be enhanced to improve each partner's chances of success?
- Sustainability: consider how you can help potential delivery partners access other sources of funding, as well as reducing their planning and delivery costs

Sound Basketball: combining sport with other lifestyle interests

The 'Sound Basketball' after-school club successfully attracted up to 75 young people per session, drawn from both keen basketballers and those more interested in music.

Market gap/opportunity

A large number of young people had some interest in sport but were not currently engaged with community or club sport, because they didn't see it as relevant to their wider lifestyle.

Offer & routes to market

As part of the initial delivery planning, the CSP undertook some consultation with young people in the local area. As well as asking them which sports they wanted to play, they were asked questions that helped shape the recruitment of coaches, delivery partners and agencies.

From this consultation Sound Basketball was developed as an informal basketball club run after school in Southwark. The exciting difference with this offer was DJs playing at the side of the courts to create an informal yet vibrant atmosphere. The young people came along to play basketball, listen to the music and even to have a go as the DJ. This combined sporting and lifestyle offer created a positive mix and integration of keen basketball players and young people who were there more for the music.

Delivery was based on young people putting their names on a board when they turned up, and as soon as there was a team ready to go, they played. The winning team stayed on for a maximum of three wins. Consequently the teams were a mix of serious and casual players, and provided the chance to get to know new people. As with other successful Sport Unlimited programmes, the young people took ownership of the session. It essentially ran itself, with 50-75 young people at each session.

The power of this customer-led approach to delivery is that it can help achieve the balance of achieving scale of impact while still reflecting local needs. By engaging the target customers in advance to understand what they want from delivery, the wider offer can be tailored to their needs while still enabling consistent delivery of the core basketball product.

Things to think about

- Customer insight: listening to the "student voice" is crucial. Finding out what young people want, and where and how they want it, not only helps to engage the target audience in the activities but also helps to retain them. This local intelligence should be developed before the activities are planned.
- Signposting: promote opportunities to come and try activities in the early stages, and then signpost participants to clubs and other programmes where they can continue playing.
- Relevant offers: let participants take ownership of the sessions, potentially creating different formats that are more relevant to their wider lifestyles. The core product (eg basketball) might stay the same, but the experiences and opportunities wrapped around it may vary based on the needs and interests of local participants (e.g. the chance to also play DJ).

No Strings Badminton: expanding the reach of social pay and play

Since the programme launched in 2010, No Strings Badminton has grown to include over 500 leisure centre sites and has delivered over 670,000 player appearances (session visits).

Market gap or opportunity

Like many sports, badminton has a number of people who express an interest in playing, but for various reasons don't play frequently enough to forge a regular habit. Reasons given for this latent demand in badminton included not having time to fit it in, not having anyone to play with, not wanting to be part of a traditional club environment or wanting an activity that was more fun and sociable while still providing some exercise. The leisure operators also needed a different badminton offer, one that could wrap around all their badminton provision and add value to the wider facility.

Offer & routes to market

To meet this market gap, BADMINTON England set about reinventing the customer experience of 'pay and play' badminton sessions. The No-Strings Badminton customer proposition is based on no commitments and no barriers. Adults of all ages, abilities and experience are welcome as the focus is on creating a relaxed and sociable session. There's no need to pre-book a court, find a playing partner or even remember your racket. The courts are all booked by the organisers, who provide shuttles while rackets can often be hired from the Centre. Playing partners are guaranteed, because a sociable session means that players rotate so they can meet and socialise with others.

Increasing the socialising and reducing the excuses extends to the online experience. The stand-alone website very consistently delivers on the customer proposition of 'no fuss just fun'. The tone of voice is chatty, the images are of "people like me" and "lifestyle" rather than sports focussed. The simple online session finder helps participants filter by what's important to them, be it travelling distance, crèche facilities or available days of the week. It then presents all relevant information on a map.

The benefits of this offer have had as much of an impact on the delivery partners as on the end customers. Over time the 'No Strings' model has evolved to ensure that it provides a simple and successful delivery model that meets operators' needs for increased sports hall usage and revenue. In the process, the NGB's role has evolved beyond the delivery to include enabling its partners to successfully deliver badminton. By responding to the needs and priorities of operators, as well as the end customer, No Strings has been able to continue growing. What's more, while not all participants are new to badminton, the experience is helping to drive up their engagement with the sport and hence establish more regular habits of participation.

Things to think about

- Customer relationships: define a distinctive customer proposition relevant to the target market and then look for opportunities to extend customers' experiences beyond the time they spend playing. Whether it's simplifying the booking process or creating a virtual social circle, loyalty and habits become stronger with frequent interactions that reinforce the customer proposition.
- Connections: programmes that achieve significant scale of impact will be those that combine well packaged local delivery with the ability to enable and influence delivery partners. This starts by involving partners in the design of programmes that meet their needs as well as those of the participant.
- Access: make it very easy for potential customers to find relevant sessions quickly. This includes a club/session finder that enables filtering by the criteria that are important to the target customers, but also includes getting national, local and online marketing optimised so that the messages are easy to find where the target market already goes looking for information.

LTA & Tennis Foundation: integrating inclusive tennis

As many as 2,160 disabled people regularly participate across 27 disability tennis networks, supported by 120 venues and 200 specifically trained coaches.

Market gap/opportunity

Tennis can be inclusive and accessible to every kind of community. The LTA and the Tennis Foundation have a vision of that potential being achieved, across all levels of tennis:

at the community level, where it means more disabled people playing, coaching and/or volunteering;

at the development level, where it means more disabled people playing more regularly, as well as the identification of talented players; and

at the performance level, where it means the continuing development of talented disabled tennis players and supporting their sustained performance at world levels.

Offer & routes to market

The Tennis Foundation established a clear vision for creating a fully inclusive and accessible sport, and then set about translating that down into local plans and tangible ways of working. The Tennis Foundation's two disability officers are fully embedded as part of the LTA's Field Teams. The disability programmes are embedded within the overall plans and priority areas, to ensure that disability delivery is treated no differently from delivery to any other target customer group.

The customer understanding behind the target groups has moved beyond seeing disabled participants as one homogeneous group. The needs, motivations and influences across each of its four priority impairment groups (deaf, visually impaired, learning difficulty and wheelchair) are well understood and are used to shape the workforce training and deployment as well as programme design. This insight also confirmed that increasing disability participation needed more disabled coaches and volunteers to act as role models. As a result, coach CPD has evolved so there are specific modules for each impairment group. To date there are 200 trained coaches delivering tennis to disabled participants.

To increase the reach and scale of impact within each impairment group, the Tennis Foundation has built strong partnerships with the non-sport disability organisations that already understand and work with people with each impairment. By getting the LTA, Tennis Foundation and organisations such as the Down's Syndrome Association working together, knowledge, skills and networks have been developed to reach the right people with the right offer at the right place.

Things to think about

- Creative partnerships: identify the organisations that already have the greatest reach and influence over target customers, and then partner with them to add sport into their existing offer. For disability sport, the disability organisations for each impairment group will already have a huge amount of insight and connections about potential participants.
- Target market: take time first to understand the needs and influences of potential participants across each impairment group. Even where the goal is fully inclusive delivery, this understanding of the target customer will help to define how workforce training, offers and delivery plans may need to be evolved.
- Clear vision and role: establish a clear vision of success, and then translate it down into tangible local plans and ways of working. Consider who needs to be working together, and how multiple programmes could benefit from adopting the same basic approach.