80 YEARS CHAMPIONING SPORT AND RECREATION

FIT FOR THE FUTURE

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HELPING THE SPORT AND RECREATION SECTOR FACE THE CHALLENGES OF TOMORROW: SCENE-SETTING REPORT

June 2015

SPORT+RECREATION ALLIANCE

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1. INTRODUCTION TO FIT FOR THE FUTURE

The sport and recreation sector is facing a challenging period. We are up against well-organised, well-resourced competition. The funding environment is tough and likely to become more so in the coming years and our current and potential consumers are becoming ever-more demanding. All of us who believe in the power of sport and recreation have a responsibility to identify these challenges, to make the changes needed to meet them head-on and fulfil our potential.

This report is the first part of a long-term project: ***Fit for the Future.*** It intends to set the scene across a number of areas where we feel there will be challenges for our members, our sector and the Alliance in the coming years. Two themes cut across all of these – the rise of technology and the need to tackle persistent inequalities in participation and involvement in sport and recreation at all levels.

This report is intended to provoke discussion and debate – it focuses only on the landscape and some potential opportunities. Our work to equip our sector to meet some of these challenges is at the heart of the Alliance's plan moving forward.

We cover a number of areas in this report but this is by no means an exhaustive list and we will be working with members to shape the direction of our future work. We will also be taking the opportunity to showcase some of the best work that our members already do, to share this excellent practice and to help to spread it more widely across the sector.

While this is a time of change, the Alliance also believes that there are real opportunities for the sector and for those willing to take on the challenge of doing things differently to respond to the evolving landscape. Technology, for example, should not be a threat to delivering high-quality activity; rather it should present an unprecedented opportunity to reach, engage and retain our current and future participants and consumers.

Fit for the Future is not simply about identifying challenges but working collectively across our sector to share best practice and to identify practical solutions to the challenges that both we and many other sectors are facing.

We are looking forward to working with our members and to bringing together the best expertise and insight from within our sector and more widely.

2. PUBLIC FINANCES AND POLITICAL CHANGE

There is no doubt that 2015 is a year of significant change. Two events dominate the political agenda and will set the direction of travel for the sport and recreation sector over the life of the next parliament and beyond: the General Election outcome and the subsequent Spending Review.

Contrary to expectations, the election has delivered a majority Conservative government. This does not, however, mean that 2015-20 will simply be five more years of the same financial and policy trajectories. While there will be elements of policy continuity, the scale of the challenge to public finances means that an emergency Budget and Spending Review will usher in further spending reductions by the end of the year. This will almost certainly presage steep reductions in public spending outside protected areas such as health and education. Public funding for sport and recreation is under serious threat.

This chapter explores the current financial and political environment and against this evolving backdrop identifies some key challenges and opportunities for the sport and recreation sector. This is a huge area to examine so we have picked out some key points.

THE PUBLIC FINANCES CHALLENGE

Two simple facts illustrate the scale of the challenge to public finances:

- **Public sector net borrowing**
  The amount needed to meet the shortfall between what Government receives in tax and what it spends is currently almost £90bn.[1] This is around double the level borrowing was at in the years preceding the financial crisis. Other things being equal, this borrowing adds to overall debt

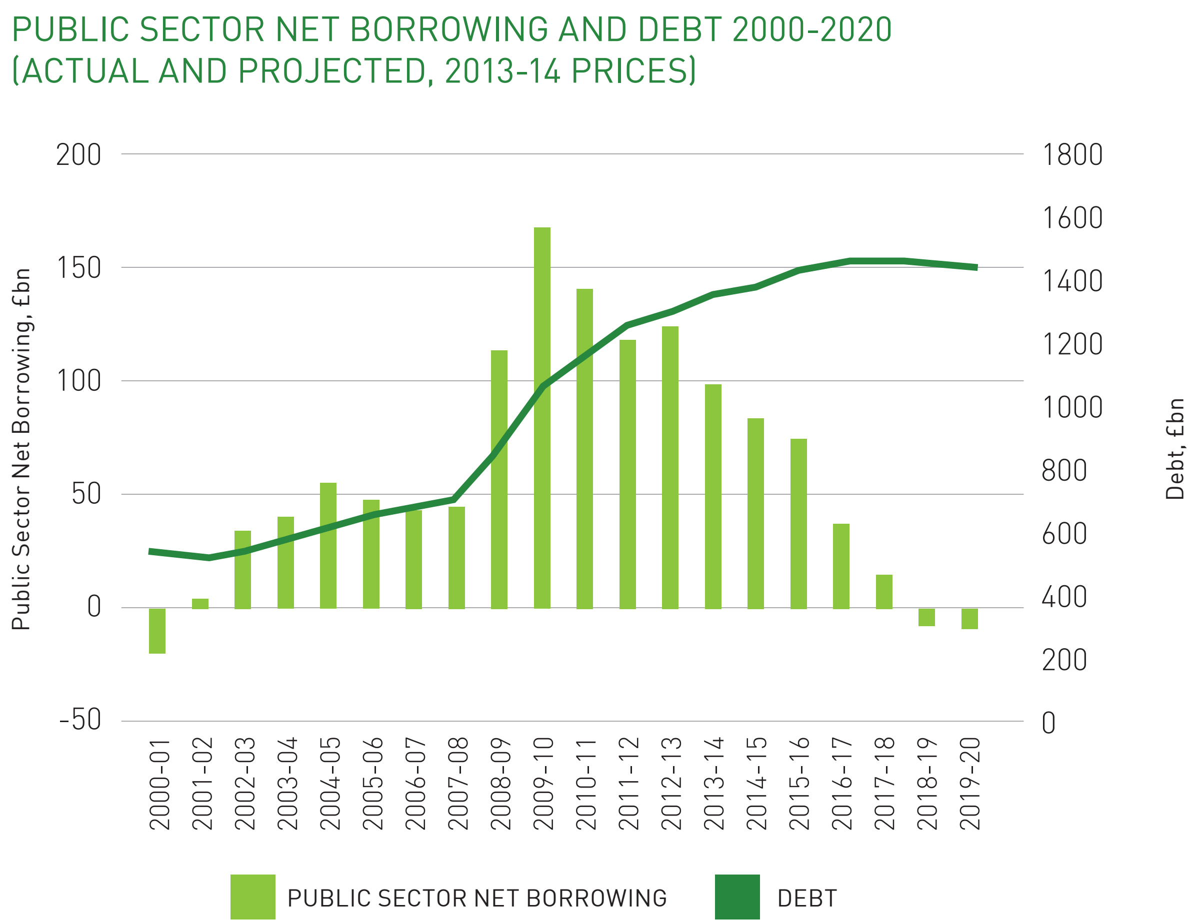
- **Public sector net debt**
  The total amount owed as a result of borrowing stands at nearly £1.5 trillion or 80.4% of national income.[2] The effect of this is that government spends significant sums (currently over £50bn per annum) on debt interest payments alone

Against this background it is clear that the Government will seek significant reductions in public spending over the life of the coming parliament in order to balance the books and reduce the overall debt burden.

Indeed, the election we have just been through was fought largely against the backdrop of how best to achieve this in the fastest yet fairest way possible.

Given that the focus will be on achieving these reductions whilst protecting essential public services such as health, education and social care, the largest cuts are likely to be targeted at unprotected areas of expenditure, both nationally and locally.[3]

Figure 1. Public sector net borrowing and debt



Source: Office for Budget Responsibility

WHERE DOES THE SECTOR CURRENTLY STAND?

Spending support for sport and recreation currently comes from a variety of sources – direct Exchequer funding via the Department for Culture, Media and Sport (DCMS) and its arms-length bodies but also from local authority expenditure on sport and leisure and National Lottery revenues.[4] In addition grassroots sports clubs are supported through tax reliefs provided to Community Amateur Sports Clubs (CASCs) and to clubs achieving charitable status.

National funding

While a great deal of spending reduction has occurred since 2010, sport funding has – at a national level – fared relatively well up to now: the share of National Lottery revenues allocated to sport rose in 2011-12 and sport received a degree of insulation from the cuts announced in the Spending Review 2013.[5] Over the period 2010-2015 more than £2 billion of support has been provided to sport by DCMS and its arms-length bodies such as UK Sport and Sport England.[6]

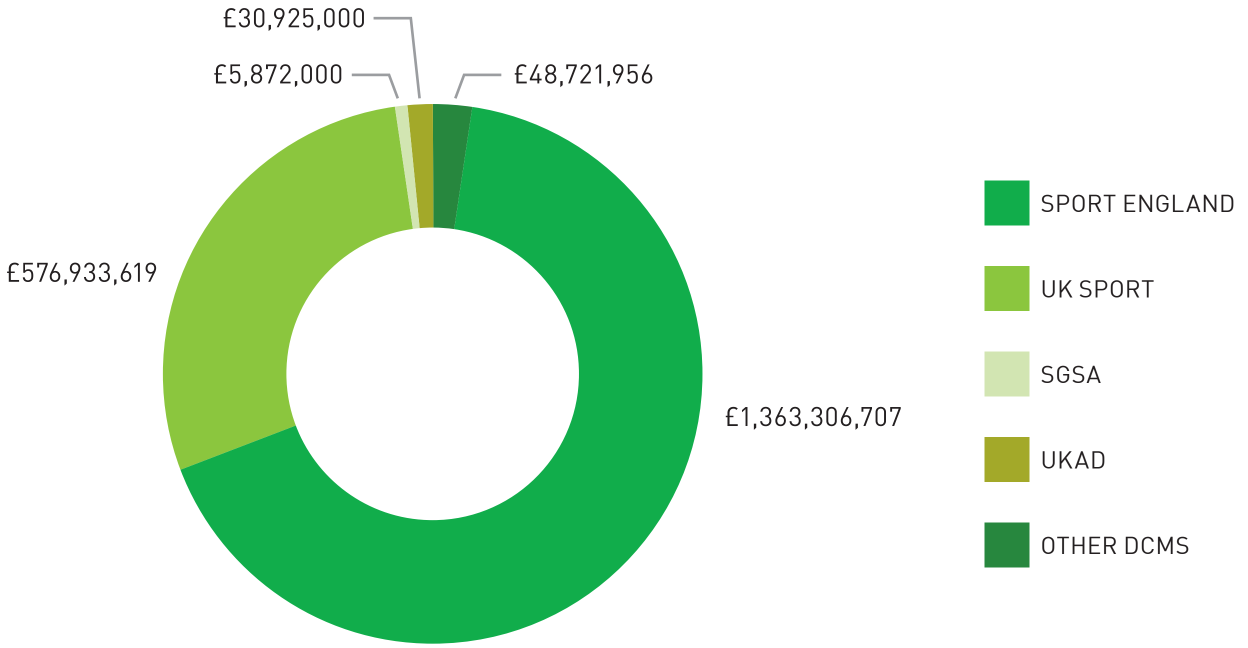
Local funding

It is at a local level where sport and leisure funding has arguably been hit hardest. Consistent reductions in the level of central government funding since 2010 means local authorities now have 25% less spending power in real terms.[7] Inevitably this has had an impact on the provision of sport and leisure: recent evidence indicates that local authority expenditure on sport and leisure has contracted by £42m since 2010 with many key facilities closed or facing the threat of closure.[8] In view of the increasing strain on local government finances – particularly from an ageing population and rising social care costs – local authorities will likely face continued pressure to reduce expenditure on sport and leisure.

In addition there is a secondary risk that, in response to these reductions in direct funding, local authorities will seek to reduce the amount of discretionary rate relief provided to grassroots sports clubs.[9]

For many clubs these reliefs are absolutely vital in order to support the provision of sport within their communities and therefore attempts by local authorities to further restrict or remove them could have a significant impact at grassroots level.

Figure. 2 Sport funding by organisation (national) 2010/11-2014/15



Source: DCMS

Table 1. Change in local authority spending on sport and leisure 2010-15

REGION CHANGE 2010-2015

1. North East: -£7,147,948
2. North West: -£12,372,959
3. Yorkshire: -£3,209,581
4. East Midlands: -£5,038,980
5. West Midlands: -£9,638,972
6. East: -£5,114,871
7. London: -£8,891,367
8. South West: -£3,347,463
9. South East: +£12,340,287

Total: -£42,421,854

Source: BBC survey

THE FUTURE: NO MORE 'SPORT FOR SPORT'S SAKE'?

While the outcome of any Spending Review is difficult to foresee with certainty, funding that might come under further scrutiny includes:

- Sport England Whole Sport Plans and facility investment
- UK Sport support for elite athletes
- Funding for sports integrity measures including anti-doping (UKAD) and sports betting corruption (Gambling Commission).

In addition there is no guarantee that the existing government structures will always remain as they are now. The Triennial Review of UK Sport and Sport England, due to report this year, may make further recommendations regarding, for example, closer joint working.[10]

Regardless of immediate changes and looking to the long-term, the scale of the public spending reductions required cannot be achieved by simply continuing with current policies or with 'business as usual'. Instead, government is likely to adopt policies that take account of the impact on future liabilities; in other words future policies must, at the very least, not add to the future debt burden and should ideally reduce it.[11]

In practice this means future funding for sport is likely to be tied much more closely to outcomes. At the moment, much of current spending is focused on driving higher participation. However, a government keen to deliver better value for money and reduce future liabilities will increasingly demand evidence as to how participation in sport contributes to achieving wider public policy goals. For example, how does participation improve health or educational outcomes? How can it help to reduce crime and anti-social behaviour?

To achieve this requires, at least in part, the sport and recreation sector to undertake a significant shift: moving away from being providers of 'sport for sport's sake' towards becoming providers of 'sport for social good'. Not only this, the sector will also need to be able to evidence the impact it has in these areas through more robust and sophisticated measurement tools.

CHALLENGES AND OPPORTUNITIES FOR THE SPORT AND RECREATION SECTOR

The future funding squeeze poses a profound challenge for the sector: how can sport and recreation continue to punch its weight in a world in which public financial support is being reduced so significantly?

Importantly this is a challenge confronting the sector as a whole – including national governing bodies (NGBs), representative organisations, clubs, athletes, administrators, national and local delivery partners and the widest range of organisations involved in the provision of sport and recreation.

In this context some opportunities the sector should consider include:

- How best to engage with policy makers to protect existing committed investment in both grassroots and high performance sport
- Identifying ways to deliver the same outputs for less, for example through shared services and more streamlined organisational/delivery models etc.
- How to improve the evidence base around the impact of sport and recreation to demonstrate its wider social and economic benefits
- Whether the existing model of funding based on participation is fit for purpose or whether a more tailored, outcome-focussed approach is required
- How to exploit sport's commercial appeal to generate more income from private sources such as sponsorship, broadcasting and commercial partnerships
- Exploiting technology more effectively to deliver efficiencies and improve the customer experience
- Ensuring that sport understands its customers better and is able to compete with alternative forms of entertainment and new market entrants
- Leveraging expertise from the private and third sectors to deliver shared objectives at lower cost.

3. THE LEGAL AND REGULATORY LANDSCAPE

While at first glance it may appear that sport is not subject to much in the way of government intervention or oversight, in practice national and European legislation has a significant influence on the way in which sport – both at the elite and grassroots level – is organised, financed, taxed and operated and even on the way it is consumed.

In addition sport remains subject – either directly or indirectly – to decisions taken by national and European courts as well as various industry regulators such as OFCOM and the Gambling Commission.

Future changes to the legal and regulatory landscape will therefore have a major impact on the sector.

SPORT AND RECREATION: CURRENT LEGAL AND REGULATORY ISSUES

While it is not possible in a short report to do justice to the breadth of the legal and regulatory issues facing sport, some key areas are set out below.

Broadcasting

Given the scale of the demand for live sport, the sale of broadcasting rights provides important income for many sports bodies and competition organisers. In many cases much of this revenue is reinvested by rights holders back into developing their respective sports, particularly at the grassroots level.

For example signatories to the Voluntary Code of Conduct for Rights Owners – principally the major spectator sports – commit to putting a minimum of 30% of the money generated from the sale of rights back into grassroots.[12] In addition an increasing number of sports are exploiting new broadcasting opportunities to grow their fan-base and profile; for example women's netball is now shown live on Sky.[13]

While there is no doubt that the sale of broadcasting rights has and continues to be of benefit to sport, their value rests on the ability of rights holders to continually improve the sporting product and to be able to ensure exclusivity for broadcasters. A number of challenges to this model either already exist or could well materialise in the coming years – particularly through rapid developments in technology – and sports bodies need to be alive to these but also to the opportunities that may also arise.

Integrity: match-fixing, doping and safeguarding

One of the defining characteristics of competitive sport is that the outcome of any contest should be unpredictable and decided by the skill of participants alone. Where sporting outcomes are determined by other means, the essential integrity of the competition is lost and sport risks losing spectators, sponsors and revenue as a result.

Similarly, sport provides opportunities for young people to participate and to develop wider personal and social skills. Putting in place appropriate safeguarding measures to create a secure environment for participants is therefore of paramount importance.

In this context sport continues to face major threats to integrity, notably:

- Betting-related match-fixing and other forms of competition manipulation
- Doping through the use of proscribed performance-enhancing drugs
- Harm to participants inflicted by individuals in positions of responsibility.

In the UK sports governing bodies and other agencies have responded to these integrity threats by implementing a range of measures designed to detect and punish offenders as well as to support, inform and educate participants – athletes, coaches and others – about the risks associated with these integrity threats.[14]

However the nature of these threats means that sport cannot tackle them alone. To respond effectively, many stakeholders need to work in concert.

Continued government support is therefore needed not just in terms of resources but also in order to help create a legal and regulatory environment that provides the tools to prosecute offenders and acts as a real deterrent to those who might contemplate becoming involved in corrupt and criminal activity.

The Sport and Recreation Alliance's ***Five-step Plan for a More Active Population*** has outlined some of the ways in which this could be done, for example, through the introduction of a sports betting right and dedicated resources earmarked to protect sports integrity.[15]

Taxation

The tax regime has an important impact on sport at both elite and grassroots level. At a grassroots level the Community Amateur Sports Club (CASC) scheme and charitable status provide reliefs that are vital to the survival of many community grassroots clubs.

At present there are around 6,600 CASCs that have benefitted from an aggregate saving of £180m over the life of the scheme. While extremely welcome, these reliefs do not come for free.

The new CASC rules for example are complex and more onerous than the previous regime. For grassroots clubs reliant on volunteers this will present a significant challenge and NGBs will need to ensure that their clubs are provided with the right tools and skills to operate within the new scheme.

At the elite level, the tax regime has a major influence on the ability of event organisers to compete for world-class events and attract top talent to the UK. Historically the tax rules around endorsement income have disincentivised major stars from competing in the UK although recent major sporting events such as the London 2012 Olympics and Glasgow 2014 Commonwealth Games have benefitted from exemptions.

Looking ahead, while recent legislation does provide the opportunity to apply for similar exemptions in future, arguably the changes do not go far enough in terms of providing certainty to sports organisers.[16]

Intellectual property rights

Sports governing bodies, event organisers, clubs and even participants derive important revenue from the commercial exploitation of their brands. This exploitation takes a range of forms, from exclusive relationships or agreements with sponsors to the sale of sports broadcasting rights and merchandising.

In this context the various legal protections available for intellectual property are vital in order for sport to be able to fully recoup the commercial returns from such arrangements.

While the issues in this field are many and varied the principal challenge remains how rights holders (and the parties they enter into agreements with) can best protect against infringement.

The types of infringement can vary and include: copyright infringement, for example by illegal streaming of broadcast content; trademark infringement; and attempts by unofficial partners and sponsors to appropriate unfairly the commercial value of sports events and competitions through ambush marketing.

In this respect the London 2012 Olympic Games provides a clear example of how legal protections, backed by legislation, can protect rights holders and ensure sport realises the full commercial value of its assets.[17]

Europe

Article 165 of the Treaty on the Functioning of the European Union (TFEU) gives the EU the power to support, coordinate and supplement sport policy measures taken by member states. Specifically the TFEU states that the EU 'shall contribute to the promotion of European sporting issues, while taking account of the specific nature of sport, its structures based on voluntary activity and its social and educational function'.[18]

A key cornerstone of this activity is the EU Work Plan for Sport 2013-17 which maps out EU activity in the areas of match-fixing, good governance, the economic benefits of sport, health enhancing physical activity (HEPA) and education, training and volunteering.[19]

Each policy area is coordinated by an expert group tasked with delivering specific policy recommendations by the end of the Work Plan period in 2017.[20]

In addition to EU sports policy activity, the professionalisation of sport and its growing importance as an economic activity means European law has a significant bearing on the sector.

This influence is seen in two distinct areas:

- Competition law – principally measures designed to restrict anti-competitive behaviour and abuse of dominant market positions by sports organisations
- State Aid – measures aimed at restricting unlawful state support for sports infrastructure and clubs, in particular where such support may distort competition between Member States of the EU.

Although the EU and its institutions have tended to recognise the autonomy of sports organisations and the unique cultural and social aspects of sport, it is nonetheless clear that these characteristics by themselves do not place sport above the law.

In this context European judgements will continue to progressively refine both the way in which sport as an economic activity is organised (for example how broadcasting rights are sold) and the extent to which sport and sporting infrastructure can be financed using public funds.

Participant safety: concussion

Recent cases within major contact sports such as rugby, NFL and others have demonstrated the significant risks to participants from concussion-related injuries. While it is clear that medical and scientific knowledge in this area is developing very quickly, in the short term sport needs to ensure that it takes a 'safety-first' approach based upon the best available advice.

There is much good practice at the elite professional level (for example in rugby) and the challenge will be how to ensure that this can be translated into the amateur/grassroots context.

In this respect the role of NGBs is crucial in ensuring that both policies and procedures to manage concussion risk are fit for purpose and that they are applied in practice at all levels from elite level down to grassroots. In addition NGBs have a major role to play in educating participants and disseminating advice on managing risks.[21]

CHALLENGES AND OPPORTUNITIES FOR THE SECTOR

There is no doubt that some of these significant challenges will present opportunities for organisations able to adapt quickly and take advantage of the changing landscape.

From a broader perspective, in view of the increased pressure on public finances, policy proposals will need to be increasingly flexible, innovative and cost-effective. In this context we believe there are real opportunities for the sector to work better together to make the case for reform in certain areas such as improvements to the regulatory regime around sports betting integrity and better protection for event organisers.

Overall the sector will need to consider seriously how it addresses:

- The proliferation of web-based, peer-to-peer technologies – for example social media-based apps such as Periscope and Meerkat – that may radically reshape the way in which sport is watched and consumed and which may enable less popular sports to grow their fan-base and raise their profile.
- Growing digital piracy, notably the availability of illegal internet streams, which may undermine the commercial value of rights and in the long run may affect broadcasters' willingness to pay for content.
- The potential for national government or EU intervention which may regulate the way in which broadcast rights are sold and/or the way that amounts received are used.
- Wider European reforms designed to facilitate cross-border access to content, notably the Digital Single Market agenda.[22]
- The development of sports policy initiatives at EU level which may in turn influence measures adopted within individual member states.
- Threats to sports integrity such as match-fixing and doping, notably how to ensure sufficient resources are allocated to the task and that the right stakeholders – sport, betting companies, law enforcement and regulators – have the appropriate powers and incentives to take action.
- The risk of harm to participants as a result of criminal wrongdoing by those involved in sport but also as a result of known risks from concussion and related injuries.
- The challenges to the ability of rights holders to protect and exploit intellectual property including the potential for more effective legislation in this area.
- The tax regime for sport and how it could be reformed to support grassroots sport and enable UK event organisers to compete for world-class events and attract the best talent.

4. LEADERSHIP, GOVERNANCE AND WORKFORCE

Leadership, governance and workforce are key aspects of any thriving organisation and central to ensuring that the sport and recreation sector is fit for the future. The way in which organisations are led and governed may need to adapt to an evolving and in some cases fast-moving external environment. The skills needed by those working in the sport and recreation sector, from national governing bodies to local programmes, might also need to develop to reflect changes in focus and demand. Across all of these areas the drive around inclusion will also require many organisations to make changes.

This chapter considers the current state of play relating to inequality in leadership, governance and workforce and suggests some challenges and opportunities that members of the sport and recreation sector might want to consider in order to be fit for the future. The ***Fit for the Future*** programme will also examine wider issues relating to leadership and governance as it develops.

THE CHALLENGE OF INEQUALITY IN LEADERSHIP AND GOVERNANCE

Although leadership and governance are key components of a succesful sport and recreation sector, there is limited data around the subject. Much of what does exist focuses on equal representation across the various roles that form executive and board levels of the sector.

Sporting Equals considered the representation of black, Asian and minority ethnic (BAME) communities in decision-making roles and surmised that while research suggests that overall BAME participation in sport is increasing, similar gains are not being seen in boardrooms, executive management or senior leadership roles. Its 2014 audit suggests that the overall BAME profile has changed very little over the past few years.[23]

The Culture, Media and Sport Committee inquiry into Women and Sport[24] stated that: "a number of those giving oral evidence pointed to the gender imbalance amongst sports governing bodies, managers and coaches, and the degree to which women in leadership roles in sport were still subject to overt, as well as covert, sexism".

In 2012, UK Sport and Sport England asked all publicly-funded NGBs to have women as at least 25% of their board members by 2017. This target was restated in the Conservative Party's 2015 manifesto.[25]

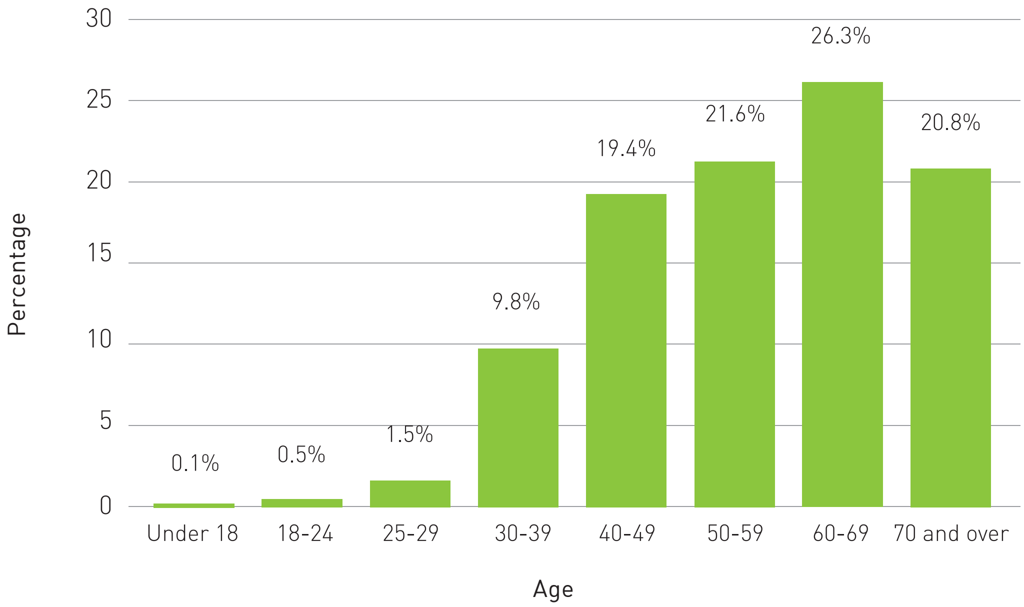
However, this figure is much lower than comparable targets for gender representation in leadership set elsewhere in Europe. For instance, the target set by the Norwegian Olympic Committee for its constituent organisational units requires composition of appointed assemblies, executive boards and councils to be directly proportionate to the gender distribution amongst the members.[26] Despite this, figures from May 2014 show:

- 22 out of 45 NGB boards funded by Sport England and UK Sport do not meet the 25% minimum expectation
- In 2009, 21% of board members were women. This had risen to 22% in the 2011/12 report and 27% in 2013/14
- The number of women in the most senior positions remains low: an average of 21% of the four senior roles surveyed are held by women.

The Government considers that more needs to be done to ensure there are no barriers to women in the rise to senior management and executive director level, and it has given a Women and Sport Advisory Board the task of addressing this, amongst other issues. Although not specific to, but potentially reflective of, the sport and recreation sector, in 2010 the Charity Commission set out the trustee age profile across England and Wales (Figure 3).[27]

Figure 3

TRUSTEES BY AGE BAND



Note: Age ranges are expressed as percentages of a total trustee figure of 810,306. Each trustee is counted only once, though same individuals are trustees for more than one charity

WORKFORCE

The sport and recreation sector workforce is varied and complex. Factors such as an ageing population, youth unemployment and funding cuts can all potentially impact on its make-up and size.

The 2015 Skills Active survey of the fitness industry[28] found that:

The average full-time salary of a respondent is £22,700, an increase from the £21,000 reported last year - this is lower than the national average full-time median salary of £27,200.

However, the average median part-time salary of respondents is higher than the national average.

Women working full-time earn 97% of their full-time male counterpart's salary. Likewise, female part-time workers earn 96% of the average male part-time salary.

The high proportion of self-employment in the industry means that 84% of people pay at least something towards their own training costs.

The gender divide in coaches is significant; only 17% of qualified coaches (1st for Sport Qualifications), and only 31% of coaches overall, are women despite the fact that women are more likely than men to use coaching (30% in comparison to 25%).[29]

In summer 2015 Sport England, supported by sports coach UK, will launch the first Coaching Plan for England which aims to champion a nation of active people supported by inspirational people.

It will be a sector-wide strategy covering the preparation, deployment, continuous improvement and delivery of coaching. It will also support the prioritisation of Sport England's funding and resources to develop coaching.[30]

As well as paid employees, sport is the single biggest volunteering sector in the UK. More than one fifth of the 15 million people who volunteer regularly do so in sport, equating to 3.2 million people.[31]

The Alliance's ***Sports Club Survey 2013*** found that there are 24 volunteers at the average club and this number had increased by 20% since 2011.[32]

Join In's estimate is that sport volunteering is worth £53bn – one of the most valuable sectors in the UK, on a par with the energy sector and four times bigger than agriculture.[33]

CHALLENGES AND OPPORTUNITIES FOR THE SECTOR

Leadership, governance and workforce are huge aspects of the sport and recreation sector that will play a central role in driving the sector forwards in the coming years. Many within the sector are already exploring areas for development but there is still space for more innovation and progress.

The sport and recreation sector needs diversity in skills and experience to grow and progress. For example, one area the Alliance will be looking at is young people's involvement in governance. This might include placing a greater emphasis on looking outside the sector to learn from other practice and to bring in new ideas and skills.

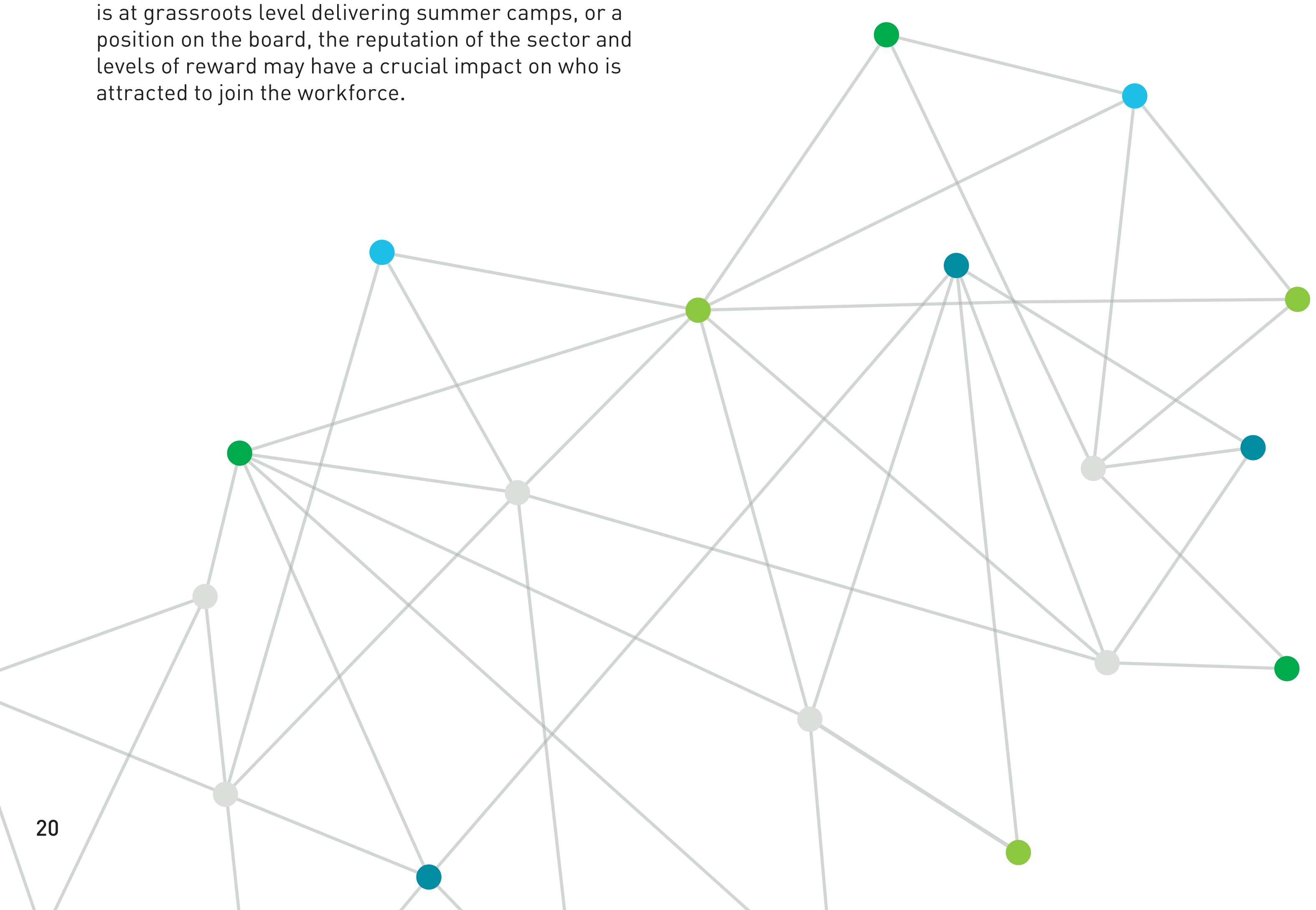
Where the sector is perceived as too traditional and reliant on established networks this can potentially lead to a legitimacy problem - for example where boards do not represent the make-up of the sport they purport to represent.

Reward and recognition within the workforce may also be something that needs to be considered. Whether it is at grassroots level delivering summer camps, or a position on the board, the reputation of the sector and levels of reward may have a crucial impact on who is attracted to join the workforce.

However, a constrained financial environment is expected to continue, so one potential challenge is around attracting high-quality candidates at all levels.

A related issue is highlighted by a comparison with the corporate sector where many board roles are remunerated. How can organisations attract new, high-quality independent directors yet at the same time not commit significant expenditure to do so?

The size of organisations that make up the sport and recreation sector is varied. One challenge is how larger organisations can support smaller ones. Also, for smaller organisations a challenge is how to identify existing talent, nurture and retain it.



Another problem that could become more prevalent, particularly as budgets are reduced, is the reliance upon volunteers to deliver 'professional' services which might otherwise be expected to be fulfilled by paid staff and which may often require specific expertise or experience.

Within the sector there is an element of relying on the same volunteers over and again to support the leadership and governance of volunteer-led organisations. While this is effective in the short term, it raises longer-term issues around sustainability.

We cannot expect the same people to continue volunteering indefinitely, and without effective succession planning in place, voluntary organisations face uncertain futures.

There may be an opportunity here for the sector to capitalise on a commitment in the Conservative Party's manifesto to 'give those who work for a big company and the public sector a new workplace entitlement to Volunteering Leave for three days a year, on full pay'.[34]

Bringing in new volunteers can bring fresh perspectives and important skills. Similarly the sector may want to consider how it can maximise the contribution volunteers make to innovation and outreach and how funded organisations can support this to grow.

Although these challenges relating to the workforce, governance and leadership pose a huge risk, they also present a fantastic opportunity to improve. In order to secure a sustainable future, sports organisations must introduce effective succession planning measures, identifying new talent to succeed existing leaders.

At the same time, it is important the sector addresses the perceived lack of representation present in leadership; improving the balance of race, age and gender until it more closely matches the balance of diversity demonstrated by participants in the sector.

With both these needs in mind, it is clear that the sector can tackle both issues through volunteering and social action programmes targeted at young people – for example Step Up To Serve – with a view to developing them into future leaders in the sport sector.[35]

Alongside all of these issues, other challenges which may also present opportunities include equality within the paid workforce and attracting young people into the sector while at the same time balancing an ageing workforce facing a higher retirement age.

5. HEALTH

Health continues to be a dominant item on the political agenda. The Health and Social Care Act 2012 represented one of the biggest shake-ups of the NHS and introduced a new era of Public Health England, the NHS Commissioning Board, Clinical Commissioning Groups and Health and Wellbeing Boards.[36] Central to the Act was the integration of health and social care.[37] Sport and recreation has a vital contribution to make to both the public and mental health agendas and many within the sector are already delivering programmes in these areas. But what more can be done?

This chapter summarises the current health environment and identifies the challenges and opportunities which face the sector.

THE SCALE AND COST OF PHYSICAL INACTIVITY

Physical activity is body movement that expends energy and raises the heart rate.

Inactivity is less than 30 minutes physical activity a week.[38]

Public Health England[39] sets out the scale of physical inactivity:

Physical inactivity is the fourth largest cause of disease and disability in the UK.

Around one in two women and a third of men in England are damaging their health through physical inactivity.

21%

Only 21% of boys aged 5-15 achieve recommended levels of physical activity.

23%

Only 23% of girls aged 5-7 meet the recommended levels of daily physical activity. By ages 13-15 only 8% do.

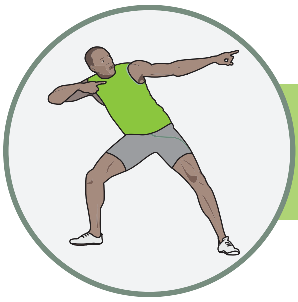
18%

Only 18% of disabled adults regularly take part in sport compared to 39% of non-disabled adults.

The Department of Health estimated that when the cost of treating diseases and sickness-related absence is accounted for, physical inactivity in England costs £8.2 billion annually.[40]

SPORT, RECREATION AND PUBLIC HEALTH

Getting people to become and remain active is a fundamental tenet of the sport and recreation sector and the case for physical activity is well made[41] :



IN THE TIME IT TAKES USAIN BOLT TO RUN 100M (9.58 SECONDS) THE NHS SPENDS AROUND £10,000 TACKLING PREVENTABLE ILL HEALTH

150 MINUTES OF PHYSICAL ACTIVITY A WEEK IS TWICE AS EFFECTIVE AS MEDICATION AT REDUCING THE RISK OF DEVELOPING TYPE 2 DIABETES

THE SAME AMOUNT OF WEEKLY PHYSICAL ACTIVITY ALSO REDUCES THE RISK OF CARDIOVASCULAR DISEASE BY 40%

40% ↓

REDUCTION IN THE RISK OF CARDIOVASCULAR DISEASE

It is also the case that[42]:

- Getting inactive people moving could prevent one in ten cases of stroke and heart disease in the UK
- Staying active can reduce the risk of vascular dementia and have a positive impact on non-vascular dementia
- People who are inactive have three times the rate of moderate to severe depression to active people.

Regular physical activity can reduce the risk of many chronic conditions including cancer, obesity, mental health problems and musculoskeletal conditions. Even relatively small increases in physical activity are associated with some protection against chronic diseases and an improved quality of life.[43]

There are many examples of activity programmes delivered by the sector that contribute to public health outcomes, for example clubs specifically for cancer survivors or which tackle obesity. There are also dementia-friendly sports programmes and in 2015 over 140 organisations signed-up to the Mental Health Charter for Sport and Recreation[44] within a month of its launch.

Recent years have seen an emergence of privately-delivered activities, like Zumba, driven by the fitness agenda. This is an example of where private initiatives have successfully identified and delivered a service that meets public demand.

People also continue to get active outdoors to improve their health. There has been an overall upward trend in visits to the natural environment for health or exercise, with this motivation cited for around two-fifths of visits taken in 2013/14. Those aged 55 and over were most likely to be motivated to visit the great outdoors for this reason.[45]

Strategically, some sport and recreation organisations are engaging at a national level, for example through Public Health England's Everybody Active, Every Day framework.[46]

Locally some areas are developing commissioning arrangements that integrate physical activity into health and wellbeing services, such as Blackburn with Darwen Borough Council's Wellbeing Service.[47]

CHALLENGES AND OPPORTUNITIES FOR THE SPORT AND RECREATION SECTOR

The health agenda is highly likely to remain prominent over the coming years. Since the election, Secretary of State for Health Rt Hon Jeremy Hunt MP has stated that he intends to put in place a national strategy to reduce diabetes and to tackle childhood obesity.[48]

The number of people aged 85 and over in the UK (1.4 million in 2012) is predicted to double in the next 20 years and nearly treble in the next 30. Alongside this, it seems likely that the proportion of people with chronic conditions and (often multiple) disabilities will also increase. Around 40% of people aged 85 and over already have a severe disability that makes it difficult for them to carry out daily activities.[49]

It seems logical to many that physical activity is a crucial piece of the health jigsaw, in terms of both prevention and helping those living with health issues. Yet there remains confusion around national and local health arrangements and around how to integrate health and physical activity to deliver an overall benefit. For example, the language of health does not necessarily match that of sport and recreation; this leads to miscommunication and missed opportunities.

In part this is because the language of health does not necessarily match that of sport and recreation which can lead to miscommunication and missed opportunities.

For example an NGB may not have a good understanding of local commissioning processes so does not engage and misses the chance to provide programmes to improve local health outcomes.

Although many are already engaging with the health agenda, some within the sport and recreation sector continue to be driven by sport-specific targets such as participation rates. However, with further funding cuts to sport on the way, organisations might want to review their purpose as well as the sustainability of their income sources.

This is not to say that tapping into health budgets is an easy way to plug financial gaps or that doing so is the right strategy for everyone. Although there are certainly opportunities for the sector to engage more, the health budget is already stretched and to access it, the sport and recreation sector needs to think about its evidence-base. Health policy is driven by outcome targets so organisations need to think about how they can demonstrate that their activities have a positive impact on health.

Walking and cycling are already recognised by leading public health experts as key ways to get inactive people moving. This is reflected by the requirement in the Infrastructure Act 2015 for the Secretary of State for Transport to set a cycling and walking investment strategy for England.[50] But another key potential area for growth is in the movement and dance sector which incorporates activity that can engage all ages and appeal to those seeking to improve their fitness in a fun way with their friends or family.

Many within the sector are already doing a deal of positive work around mental health but this is an area which may provide more opportunities given that the Government is committed to 'continue to take mental health as seriously as physical health' and to increasing funding for mental health care.[51]

Another opportunity around the health agenda is the potential for new, innovative partnerships - for example sports organisations linking with mental health charities that recognise the value of physical activity and want to do more. By combining expertise and resources, the potential to make a positive impact on people's physical and mental wellbeing is huge.

Outside of the sector, there are challenges around the public's perceptions of physical activity.

Although the Chief Medical Officer issues guidelines for recommended periods of activity across the life course[52], there is legitimate concern that the public is not sufficiently aware of these or of how dangerous physical inactivity can be.

This may provide opportunities for the sport and recreation sector to promote itself and work in partnership with health leaders to share messages with the public and to get more people active.

To be fit for the future, the sport and recreation sector should consider how it links into the health agenda. It might not be right for all but for many there are opportunities to grow and build partnerships in this area.

6. NATURAL ENVIRONMENT

The natural environment offers a wealth of opportunities for people of all ages to be active and participate in sport and recreation. Whether it's on land or water, in urban or rural spaces, the natural environment is a valuable asset that many are working to protect and make more accessible. Yet at the same time there are concerns around protecting the natural environment and it is only recently that the sector and government have begun to discuss a joined-up policy approach to outdoor recreation. So what does this all mean for sport and recreation organisations going forwards?

This chapter sets out the broad state of play around the natural environment and discusses some of the challenges and opportunities which the future holds. Some organisations are more closely linked with the natural environment than others but it is an important issue for many to consider.

THE CHANGING ENVIRONMENT

Our world is changing. Scientific studies have found that global temperatures have risen since 1880, with ten of the past 12 years being the warmest ever. The global sea level has risen about 17 centimetres in the last century and the rate of increase in the last decade is nearly double that of the whole of the last century. Snow is melting earlier; the amount of spring snow cover in the Northern Hemisphere has decreased over the past five decades.[53]

For the UK, 2014 was the warmest year recorded in the series from 1970 to 2014.[54] In 2014, average rainfall was 195.7 mm (14.8%) higher than in 2013, and 82.3 mm (5.7%) higher than the ten year average covering the period 2002-2011.[55]

Air pollution can impact on people's health and desire to get outdoors. In April 2015, the UK Supreme Court ordered Government to deliver new, more effective plans to cut illegal levels of air pollution in Britain.[56]

Changes in our environment due to climate change may impact on the type of sport and recreation activities people want, and are able, to do. For example, one study states that 'climate change has the potential to be a barrier to participation in physical activity, particularly in areas where temperatures are already relatively high'.[57]

On the other hand, others suggest that rising temperatures could encourage more people to get outside and result in increased levels of physical activity.[58]

THE VALUE AND SCALE OF OUTDOOR RECREATION

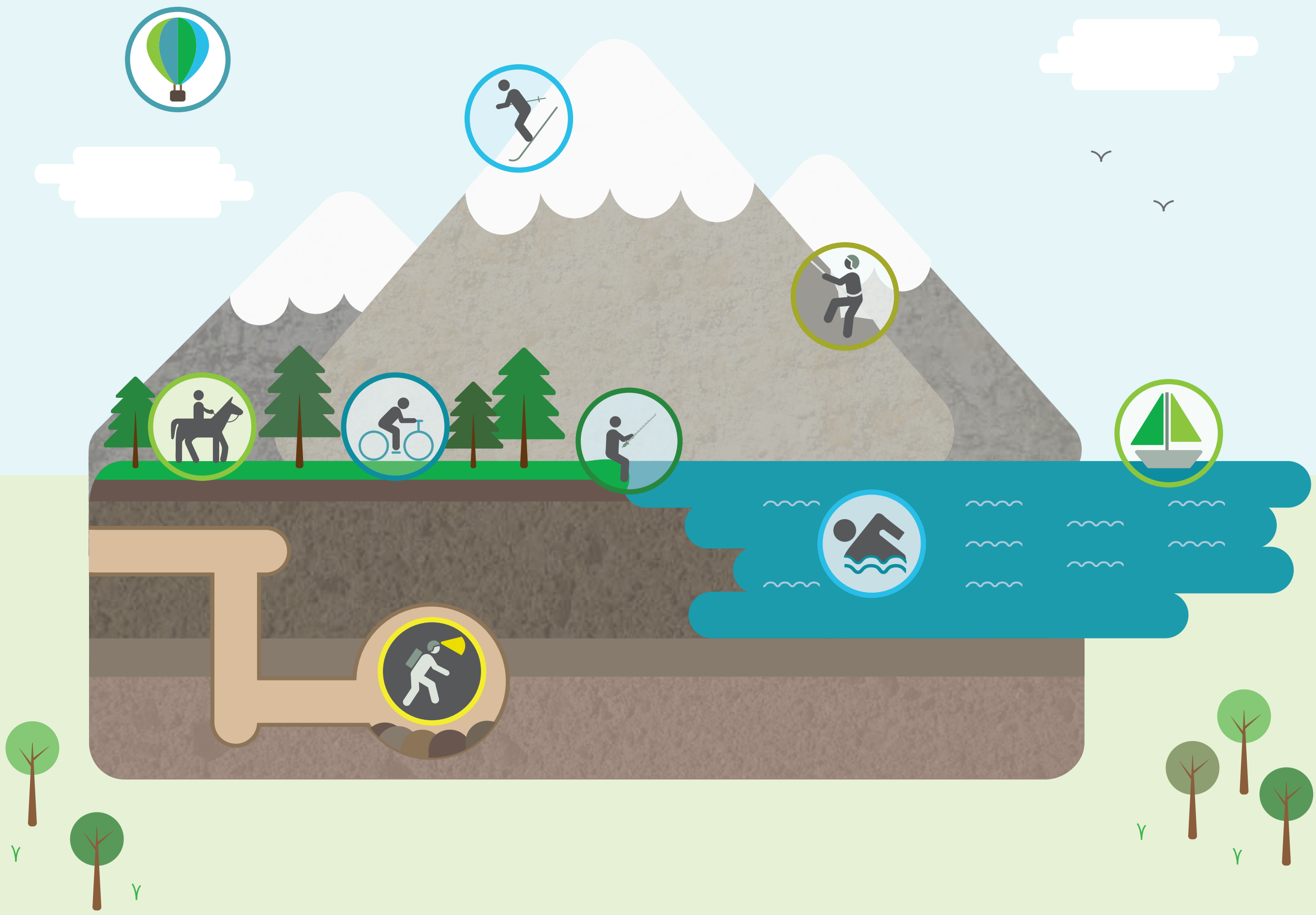
The natural environment is invaluable for many within the sport and recreation sector as it is where their activities take place. Being active outdoors not only benefits individuals but society as a whole. In 2014, the Sport and Recreation Alliance published ***Reconomics***[59] which sets out the economic value of outdoor recreation. It found that outdoor recreation:

> "Outdoor recreation refers to any physical activity taking place in the natural environment"
>
> (Reconomics, 2014)

- Is the UK's favourite pastime: three in four adults in England regularly get active outdoors
- Drives the visitor economy: people spending their day enjoying outdoor recreation spent £21 billion in 2012/13 - and when you factor in overnight visits this comes to £27 billion
- Creates jobs and skills: walking tourism alone supports up to 245,500 full-time equivalent jobs
- Promotes a healthy nation: outdoor recreation can make a significant contribution to tackling the £10 billion cost of physical inactivity.

Natural England's 2013-14 Monitoring Engagement with the Natural Environment (MENE) survey found that:

- Around nine in ten members of the English adult population visited the outdoors at least once in the last 12 months
- Parks in towns and cities were the most frequently visited destination type accounting for 778 million visits
- Walking was by far the most frequently undertaken activity
- Three-quarters of visits were less than two hours in duration, while two-thirds involved walking to the visit destination
- Almost four-fifths were taken within two miles of the visit start point.



Sport England's Active People's Survey[60] tracks participation in sports including those that take place outdoors. The latest survey results show the numbers of people participating in activities once a week for at least 30 minutes:

- **Over 2.1 million people aged 14 and over are cycling**
- **Over 110,000 people participate in angling**
- **Nearly 100,000 people go mountaineering**
- **Nearly 100,000 people go rowing**
- **Over 67,000 people go sailing**
- **Over 63,000 people go canoeing.**

People are also participating in more informal outdoor activity. In this respect one of the biggest recent successes has been the development of mass-participation movements such as parkrun. Across the UK there have been nearly 44,000 parkrun events in total participated in by over 680,000 people.[61]

Other considerations around the natural environment in relation to sport and recreation include the protection and use of green space, natural land and water assets. Making the outdoors accessible in both rural and urban environments, as well as countryside, woodland and the coast, is also vital to ensuring that everyone has the chance to benefit from being active in the natural environment.

Part of this is reliant on having effective transport systems to ensure that people are able to reach the outdoors and also support for people to participate in 'active travel', such as cycle-to-work schemes.

Locally, investment in facilities to engage people in outdoor recreation varies and as public funding cuts continue this remains a challenge for those making crucial decisions on where to invest. This opens up the market to other providers such as private companies and social enterprises and for some communities it might be an opportunity to take over and run local assets.

CHALLENGES AND OPPORTUNITIES FOR THE SPORT AND RECREATION SECTOR

Over the past few years, momentum has been gathering around outdoor recreation. The sport and recreation sector has come together with government departments to discuss its value and promote the benefits of being active in the natural environment.

In March 2015, the then Minister for Sport and Tourism Helen Grant MP said[62]:

"Outdoor recreation can play a big role to boost the nation's health and well-being and I am committed to championing this sector. I want more people to take advantage of Britain's great outdoors - whether that be running in the local park or treetop trekking"

The Sport and Recreation Alliance's ***Five-step Plan for a More Active Population***[63] reflects the prominence of outdoor recreation within our membership and calls for a dedicated minister to deliver a long-term outdoor strategy.

It also recommends that the Government and stakeholders agree a strategy for the long-term preservation and promotion of the nation's paths, trails, waterways and coastline and that the Government should place outdoor activity and green spaces at the heart of a strategy to improve health.

There is already an outdoor recreation action plan for Northern Ireland[64] and by working together the sport and recreation sector and government has created a basis for the development of a similar strategy for England.

There is an opportunity to consider further participation trends in the outdoors and how the sector can respond to these. For example, activities in the outdoors are ideal for people who want to do a mix of things – a participant might go out with walking boots and a bike to a site where he or she can hire canoes and do adventure trails and decide what to do when they arrive or in winter go skiing but in summer switch to water skiing.

"Outdoor recreation can play a big role to boost the nation's health and well-being and I am committed to championing this sector. I want more people to take advantage of Britain's great outdoors - whether that be running in the local park or treetop trekking."

So there may be openings here for organisations to work together around the 'active person' rather than around specific sports.

With or without national strategies, there is much to celebrate about outdoor recreation and the benefits being active in the natural environment can bring to people's health and wellbeing.

But there are also challenges that the sport and recreation sector should consider. These include issues around our changing physical environment and climate which, for example, can have an impact on scheduling and participation in seasonal sports.

Other challenges include:

- **How to build on the existing evidence and make the case for outdoor recreation? How to demonstrate the value of outdoor recreation to other agendas, such as health?**
- **How to tap into existing and potentially new funding streams?**
- **How to work with new partners to create high-quality spaces and provision for outdoor recreation?**
- **How to maximise the natural environment in both urban and rural areas to get people active?**

In this arena, it's not only about the sector being able to thrive but also about ensuring that the natural environment itself is fit for the future.

7. PARTICIPATION AND IMPACT

People take part in sport and recreation for different reasons, for different amounts of time and in different environments. But what does participation mean beyond numbers of people being active? Participation figures can mean the reward or withdrawal of funding. Participation can mean inclusion, enabling people who have never been active or who have never experienced sport and recreation to join in. It can also mean the development of skills and a route into employment, as well as increased physical and mental wellbeing.

Participation is sometimes the key performance indicator for sport and recreation organisations and many are striving to increase numbers as a result. However, as political and social agendas change and priorities shift, is participation really the best way to measure success?

This chapter considers some of the key current trends and issues within the broad arena of participation and impact before moving on to suggest possible challenges and opportunities for the sport and recreation sector.

PARTICIPATION TRENDS

The huge variety of sport and recreation activities available reflects the wide range of interests and reasons why people participate in sport. Formal, competitive activities continue to appeal alongside more informal ones.

Sport England's annual Active People Survey (APS) measures how many people take part in organised sport for at least 30 minutes once a week (the '1x30' measure). The latest survey (APS 8) found that the number of people in England who regularly take part in sport is rising.

During the year up to October 2014, 15.6 million people aged 16 years and over in England played sport at least once a week; an increase of 1.6 million since 2005/6. Within individual sports there have been increases and decreases in participation rates.

The APS also provides data on who is taking part in sport:

41% of men play sport at least once a week compared to 31% of women.

55% 

55% of 16 to 25 year olds take part in at least one sport session a week compared to 32% of older adults.

The number of black and minority ethnic adults playing sport is increasing.

 17%

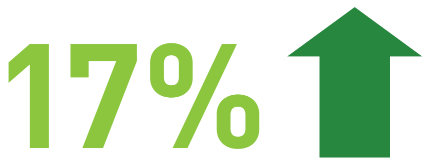
17% of disabled people are taking part in sport, up from 15% in 2005/6.

As well as participation in organised sport, over recent years a fitness drive among the population has seen the growth of activities such as Zumba. This reflects a possible increase in demand for activities that people can fit into busy lifestyles. Using the Zumba example, it is also often run at centres that offer other activities so parents can take part while children are attending their weekly sports session.

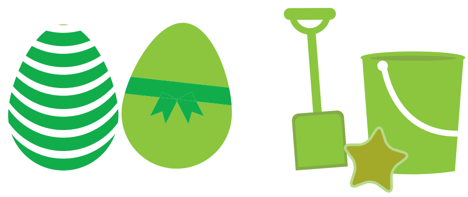
Natural England's Monitoring Engagement with the Natural Environment (MENE) survey also monitors people's activity. The 2013-14 survey[65] identified the following trends:

During 2009/10, half of the population claimed to visit the natural environment at least once a week. This rose to around six in ten in 2013/14.

Data suggested a possible trend for decreased visits to countryside destinations, which corresponds with evidence of a trend towards increased visit levels to destinations in towns and cities.



The role of locations in towns and cities for outdoor recreation visits has increased over time - the annual estimate for visits taken to towns and cities was 1.36 billion in 2013/14, a significant increase on the estimate of 1.22 billion recorded in 2012/13 and an overall increase of 17 per cent on the 2009/10 estimate of 1.16 billion visits.



The seasonally adjusted data demonstrated that the Easter holiday period impacts on visits to towns and cities, while visits to seaside resorts and towns were more likely to be taken at weekends.

The Alliance's ***Future Trends*** report[66] , produced in partnership with the Future Foundation, considers themes which are likely to become increasingly important to all within the sport and recreation sector:

- *The Quantified Self* – The use of technology to collect, analyse and interpret data about movement and performance
- *Game on* – The incorporation of playfulness into mainstream products, services and retail contexts
- *Healthy hedonism* – The increasing expectation that healthy behaviours should be fun. Consumers no longer want to make a choice between enjoyment and sensible choices
- *Performance perfection* – The use of social media to broadcast views and experiences and interact with others with similar interests
- *Cult of the home* – The increasing role that our living rooms play as attractive spaces in which to socialise and engage with sport and recreation.

MEASURES OF SUCCESS

How to measure success and demonstrate impact is a hot topic across many sectors, not just sport. While each of the funded national governing bodies has a range of targets to meet – including targets relating to talent development – the headline target for most is to drive up participation as measured by APS to a pre-agreed level by 2016/17 under the Whole Sport Plan programme.

Within the Whole Sport Plans, Sport England expects that the total investment available for participation is split 60% to benefit people aged 14-25 and 40% to benefit the rest of the adult population[67].

For those not receiving Sport England funding, participation figures are important but some organisations are using other measures of success such as health-based outcomes or impacts on anti-social behaviour. Others may consider success to be helping people to gain new skills and enter employment.

Sport and recreation can also often be the means to an end for many organisations and not necessarily delivered by those within the sector. For example, football has been used in youth projects to reduce anti-social behaviour. The European Union ***Work Plan for Sport 2014-17***[68] also examines wider public policy goals related to sport including education, training, employment and volunteering.

> ...sport can be a powerful vehicle for social inclusion, gender equality, and youth empowerment... There is nothing like sport to bring women and men from different cultures together around the shared values of fair play, mutual respect and team spirit... Sport is a pillar of a healthy society, at ease with itself, united in its diversity, based on human rights and equal dignity. It provides a field for passions to be shared, for communities to come together, for the disadvantaged to be empowered.
>
> (Ms Irina Bokova, Director-General of UNESCO, 2015[69])

Participation can also be broken down into specific target groups. This is an important way to measure how inclusive sport and recreation is. It also enables providers to develop new offers to give more people the opportunity to be active.

On a more individual basis, advances in technology mean that people are able to record and decide their own measures of success, for example number of calories burnt or distance travelled. Alternatively, some people may define success in terms of reducing social isolation, meeting new friends or getting out of the house.

Technology can also be used to create new movements. An outdoor recreation example is Geocaching where people share co-ordinates of an item or container hidden at a particular location for other people to find using GPS trackers. Advancements in technology are also seen at an elite level, for example the introduction of goal-line technology in football and GPS tracking within training sessions.

CHALLENGES AND OPPORTUNITIES FOR THE SPORT AND RECREATION SECTOR

There are many challenges to the sport and recreation sector around participation and measuring impact but, as with all our topics, these bring opportunities too.

A challenge for the sport and recreation sector is to keep up with the pace of technological advancements and the culture of computer gaming and online competition. However, the sector can maximise the benefits of these developments to develop sport and activities and also to engage and motivate people to participate.

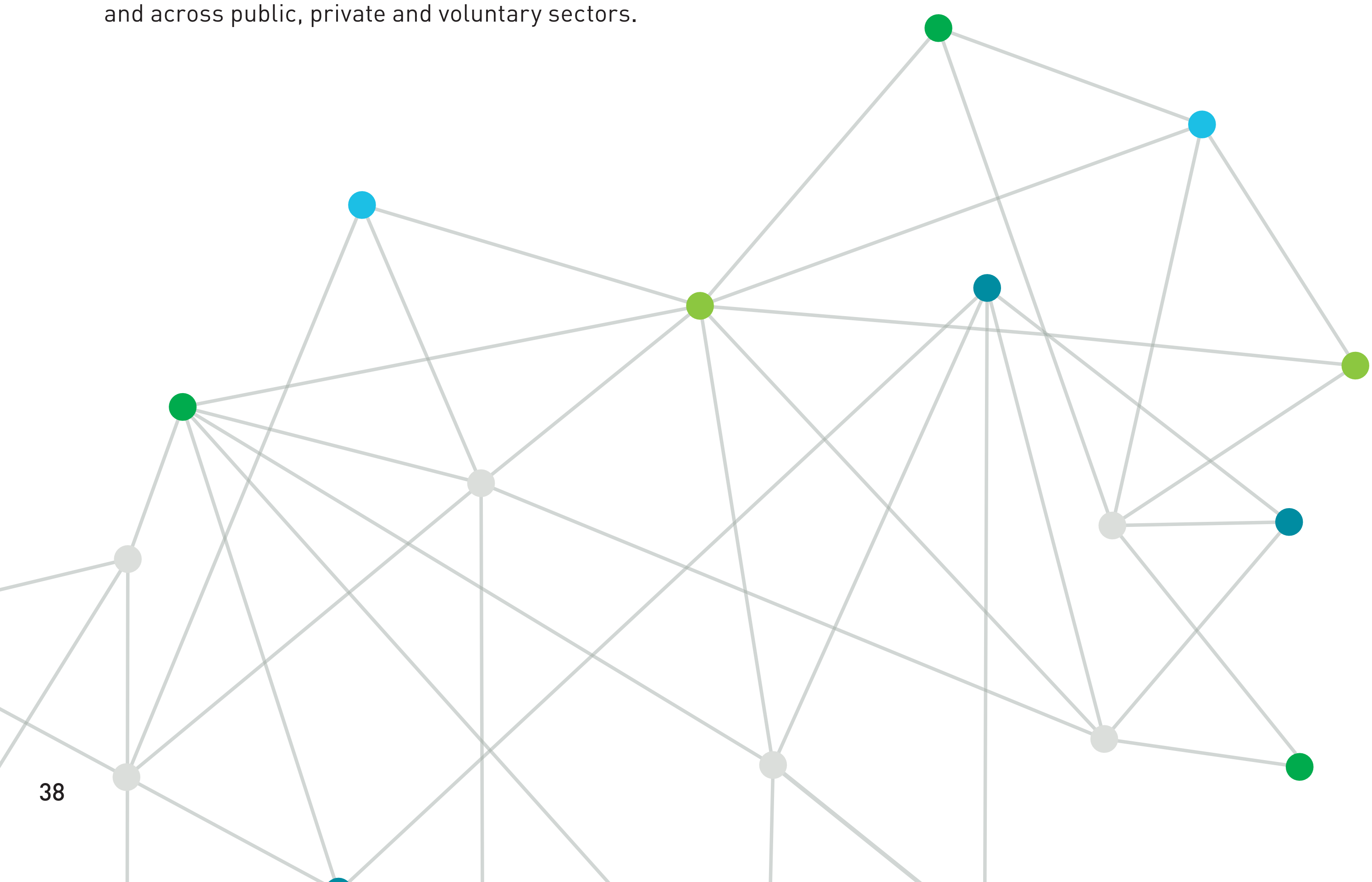
For example, clubs can engage new members through interactive, mobile-friendly websites and organisations can encourage the use of apps, such as Strava or Runkeeper, to monitor performance and build up networks.

Participation trends help identify patterns of behaviour and are a chance for providers from all sectors to see if they can find new ways to meet changing demands. Whether it's identifying a surge in a specific type of activity or a lack of participation within a target group, there are many ways for the sport and recreation sector to get people involved. There are also opportunities to develop innovative partnerships within and across public, private and voluntary sectors.

Organisations may also identify opportunities for joint working around people who tend to do lots of different activities, for example someone who likes being outdoors and will swap between hiking, cycling and mountaineering. By identifying gateway activities, there is scope to maximise participation in other areas.

New market entrants will also bring competitive pressure to bear on existing sports providers and their delivery models. Relatively new organisations such as parkrun are demonstrating that mass participation can be delivered with relatively little in terms of overheads.[70] Importantly, like Zumba, these activities are attracting people with their flexible, low cost, 'turn up and participate' approach.

This reinforces the need for NGBs and other organisations that offer more organised sport to be more agile and customer-focussed with their offering in order to retain participants and grow their sports. Lessons can be learned from other industries that have transitioned from a relatively 'producer-led'm odelt oo net hati sm orer esponsivet o consumer demand.



In this respect, the ability of the sport and recreation sector to market its offer and use technology to engage people is a potential barrier but there is also scope here to learn from others within and outside of the sector.

Debates around impact measurement have become more prevalent in recent years and evaluation techniques and systems more sophisticated. Many within the sport and recreation sector have responded, with larger organisations investing in insight work and research. But others, especially smaller organisations, might want to consider how they are going to respond to this.

On the funding side there may be scope to review the existing mechanisms for funding NGBs to deliver participation through Whole Sport Plans. For example, Sport England funding has tended to incentivise by making funding conditional on the achievement of participation targets. However, arguably the existing mechanism doesn't fully take account of fluctuations in participation that occur due to wider economic conditions as well as other factors that affect uptake such as adverse weather or the fact that people engage in a number of different activities.

The result is that funding can be withdrawn at short notice which in turn can lead to inefficient, 'stop-start' investment. In this context consideration might be given to developing a more tailored, risk-sharing approach between funders and NGBs which takes account of the differing challenges facing particular sports and the factors that drive participation in each.

Lessons can be learned from other regulated sectors that employ a range of different approaches to incentivising performance through contractual mechanisms such as utilities and transport.

In addition, existing funders might change their criteria in response to government agendas or other external pressures. This could result in a shift in focus away from straight participation numbers towards funding for health or social outcomes such as a reduction in anti-social behaviour.

Many within the sector are already working in these areas but are not measuring their success against these outcomes. Others aren't ready to engage but recognise that this could be an opportunity for innovation and diversification of the offer.

Participation and impact measurement are huge topics. Reviewing organisational approaches to these areas may expose sports and recreational organisations to new funding sources and also attract more people to take part.

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