

# 1. INTRODUCTION

This report has been compiled by the Sport Industry Research Centre (SIRC) at Sheffield Hallam University on behalf of the Chief Executive Officers' Forum (CEO Forum) which represents 39 of the leading national governing bodies (NGBs) of sport in England. The CEO Forum is a new group which aims to act independently as a voice for national governing bodies of sport; to be a 'go to' group of sport. for policy makers who impact on sport; and to influence policy that impacts on sport. The CEO Forum is a mixture of Olympic, non-Olympic, Paralympic and major spectator sports from football and rugby to handball and boccia who have come together with one clear aim; to promote the work and value of NGBs.

NGBs have been on an exciting journey in the last 10 years. They have matured into high achieving, modernised, professional organisations helping to deliver the heartbeat year period. of sport in this country alongside an enviable volunteer network. The State of Play demonstrates the impact being made on the sport sector and the CEO Forum intends to build on their respective and collective achievements contained within this report through the sharing of good practice. For the purposes of this report, all references to NGBs from this point forward mean those sports that are part of the CEO Forum<sup>1</sup>.

In order to provide some high level insight into the work of NGBs, the members of the CEO Forum were asked to provide answers to 10 key questions which we call the State of Play. The 10 questions and the broad areas of sport policy to which they relate are shown in Table 1. All answers to The State of Play audit relate to the calendar year 2014 unless otherwise stated.

NGBs were provided with a spreadsheet template to complete along with a set of guidance notes explaining how the relevant data should be completed. The analysis and interpretation of the final data set was carried out by SIRC. This valuable data set is an initial sign of the membership working together cooperatively for the wider benefit

The membership of the CEO Forum represents the majority of sports funded by both Sport England and UK Sport. Sport England funds 46 NGBs and in the 2013-2017 cycle will invest £368m in a range of Olympic, Paralympic, Commonwealth, team and other sports. Members of the CEO Forum are scheduled to receive £300m of this investment which equates to 78% of Sport England's funding for NGBs over the four

1 This report is the State of Play for the 39 NGBs that are part of the CEO Forum and does not claim to represent sports that are not part of the Forum.

**INFLUENCE** 

## The 10 questions that constitute the State of Play

OMMUNITY SPORT	Number of affiliated clubs					
	Number of club members					
OMPETITION	Number of competitions held					
	Number of competitions in schools					
OLUNTEERS	Number of volunteers					
	Financial value of volunteers					
LITE SPORT	Medals won 2009-2014					
	Athletes in the talent pool					
AJOR EVENTS	Number of major events hosted					
ITERNATIONAL	Number of people holding positions of					

international influence on behalf of NGBs

UK Sport by contrast, funds Olympic and Paralympic sports only and will invest £347m to illustrate how they have used their over the 2013-2017 Rio cycle. CEO Forum members are scheduled to receive some £196m of this investment which equates to 57% of UK Sport's overall investment. Clearly the CEO Forum is a major player in sport as its membership accounts for 68% of the total funding awarded by Sport England and UK Sport.

The membership of the CEO

Forum represents the majority

The State of Play report enables NGBs investments to deliver sporting and societal outcomes and to say 'thank you' to Sport England, UK Sport, the National Lottery and of course the Lottery playing public. We now consider each of the five areas and ten questions in turn to illustrate the State of Play in English sport.



#### The State of Play

# 2. COMMUNITY SPORT

Area COMMUNITY **SPORT** 

Question **NUMBER OF AFFILIATED CLUBS** NUMBER OF CLUB MEMBERS

Answer 50.262 1.812.132

The NGBs have a combined total of 50.262 clubs which is the equivalent of 125 clubs in every local authority district in England. These clubs in turn have a combined membership of 1,812,132 which gives an average club membership of 36 people across the 39 sports. These vary from Sunday football teams with a membership of 15 to large scale gymnastics clubs with over 1.000 members.

To put the overall scale of sports club membership into perspective, a January 2015 House of Commons Library report details that all of the political parties in the UK combined have a membership of 738.300. There are over 1,000,000 more members of sports clubs in England than there are members of political parties in the entire UK. Sport clubs not only provide opportunities for people to play sport, they also play a role in developing social capital and community cohesion.

There have been increases in the number of people playing sport and increases in the number of people taking part in more sport as revealed by the eight Active People Surveys conducted between 2005/6 and 2013/14. NGBs have responded positively to the increase in demand for sport by altering the conditions of supply. The most recent results reveal that an additional 1.6m people are participating in sport and physical activity once a week compared with 2005-6.

CEO Forum sports account for over half of this increase, however, since the survey has

only recently begun to record participation among young people.

NGBs' own data indicate further growth in participation among school age children, reflecting targeted action by the governing bodies. In rugby for example, the RFU's current All Schools programme aims to introduce 750 new state secondary schools to Rugby by 2019, at the same time as developing links between schools and clubs to give students a route into adult participation. The route from school to club to representative participation is a welltrodden path, and underlines the importance of community clubs in talent identification and development.

Part of the rationale for hosting the Olympic and Paralympic Games in 2012 was to 'inspire a generation'. However, there is little point in attempting to inspire a generation into sport if the initial wave of enthusiasm is constrained by clubs without capacity; insufficient coaches and volunteers; insufficient venues; and inadequate playing surfaces and equipment.

The sports clubs in England have played an important role in helping to convert the desire to take part in sport since London 2012 into a measurable reality. Not least of all there are nearly 5,000 clubs amongst the CEO Forum's membership which are signed up to the Clubmark accreditation scheme which formally recognises high quality and inclusive community sport club provision.



# 1,000,000 1.6m

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# Area **COMPETITION**

Question
NUMBER OF COMPETITIONS HELD
NUMBER OF COMPETITIONS IN SCHOOLS

Answer 2,967,534 26.729

A key function of NGBs is their role in facilitating and authorising the playing of both recreational and competitive sport. Whether it be the tens of thousands of football clubs that play league matches at various standards for nine months of the year or the 42 boccia clubs in England; the common denominator is that NGBs are the providers of competitive sporting opportunities.

These opportunities are created in community sport and in schools. The State of Play audit asked NGBs to quantify how many competitions they provide and the answer is a rather staggering near three million in the community and a further 27,728 in schools. On average, every day there is in excess of 8,000 sporting competitions taking place across the 39 sports represented on the CEO Forum.

It is particularly noteworthy that the number of competitions held in schools has increased dramatically since Sport England has pursued an NGB-led strategy. The introduction of School Games has required schools to use NGB-approved competition frameworks and NGBs have embraced this opportunity by increasing the number of competitions in schools from around 6,500 in 2009 to 26,729 in 2014. Whilst the NGBs have developed the frameworks for these competitions, the excellent partnerships between the NGBs and the County Sports Partnerships and Youth Sport Trust have allowed these competitions to flourish.

There are now logical pathways in place for children to participate in high quality sporting competition within schools, between schools and at representative level via county level sports festivals.



#### BADMINTON ENGLAND

Impact

An increase from 350 young people at Key Stage 3 and Key Stage 4 in 2007 to 32,000 playing in the National Schools Badminton Championships in 2014.

#### How

Following a strategic decision to increase the number of young people playing badminton, Badminton England partnered with School Sports Coordinators, County Sports Partnerships, County Badminton.

Associations, School PE staff and a commercial partner (Center Parcs), to excite and inspire more people to play badminton.

Since 2007, the National Schools Badminton Championships has grown to become one of the biggest schools badminton events in Europe and engages 32,000 pupils, 5000 teams and 1500 secondary schools.

# Area **VOLUNTEERS**

Question NUMBER OF VOLUNTEERS FINANCIAL VALUE OF VOLUNTEER TIME Answer 1,908,991 £4,995,381,784

The provision of sporting opportunities is largely attributable to the invaluable army of sports volunteers who coach, organise, officiate and support sport in England, many of whom will have undertaken training or education courses and qualifications developed and delivered by NGBs. According to the Active People Survey around 7% of adults, some three million people, volunteer for sport. This makes sport the second largest sector for volunteering, second only to caring for relatives and friends. Amongst the NGBs there are 1.9 million volunteers which is larger in number than the entire workforce of the National Health Service in the UK or the membership of Britain's largest trade union, Unite, (both c. 1.4m).

These volunteers freely contribute their time to sport and on average this time commitment averages out at just over an hour per week per volunteer. If we take the average hourly rate for employees as a proxy for the monetary value of this time, then the overall value of the contribution made by volunteers in NGBs is around £5 billion per year<sup>2</sup>. This is equivalent to a subsidy for sport of £104 per head of population in England.

2 Direct financial value of volunteer time for each sport is defined as the hypothetical cost of replacing volunteers with paid labour. It is calculated by multiplying the number of volunteers by the average amount of time spent volunteering in that

sport (both from the Active People Survey) and the average hourly wage (drawn from the Annual Survey of Hours and Earnings. Based on methodology in Sport England (2003) Sport Volunteering in England 2002. In addition to the direct impact of volunteers enabling sport to take place, there is also an indirect impact providing people with work experience and skills that contribute to enhanced employability and wellbeing for those involved. Team working, communication and leadership skills can be developed through sport (BUCS 2014³) and are increasingly valued by employers and government agencies alike. These skills are being delivered systematically by a variety of NGBs working with young people who are NEET⁴ and help to demonstrate the organisations' wider contribution to society.

1.9m

Amongst the NGBs there are 1.9 million volunteers which is larger in number than the entire workforce of the National Health Service.

3 British Universities and Colleges Sport (2013) The impact of sport on graduate employability, BUCS, London.

4 NEET stands for Not in Education, Employment of Training.



£4.9 billion 1,812,132 Value of volunteers **Club membership** [over 1 million more than UK political party membership] 1,908,991 NGB volunteers [more than entire NHS workforce] Major events held 50,262 26,729 Affiliated clubs Competitions in schools 169 9,300,000 Positions held in international sports influence People doing at least 30 minutes of sport each week **Competitions held** 

# 5. ELITE SPORT SUCCESS

Area **ELITE SPORT** 

Question
MEDALS WON 2009-2014
ATHLETES IN THE TALENT POOL

Answer 1,095 10.803

Among the NGBs are 31 different sports for which the pinnacle of achievement is either the Olympic Games or the Paralympic Games. Since the United Kingdom first began to invest in elite sport in 1997 via the use of National Lottery funding, there has been the creation of a world class elite sport development system - a partnership between the NGBs and UK Sport - that is now the envy of rival nations and a system that provides athletes with world class coaching, support staff and training to deliver success on the world stage. The success of this system is best illustrated by examining performance in the Olympic and Paralympic Games since Atlanta 1996 as shown in Tables 2 and 3.

A partnership between the NGBs and UK Sport - that is now the envy of rival nations and a system that provides athletes with world class coaching, support staff and training to deliver success on the world stage.

Success has not been confined to Olympic and Paralympic sports and there is also evidence of success in other multi-sport events such as the Commonwealth Games which includes non-Olympic sports such as netball bowls and squash on its roster. When we look at the data from the Commonwealth Games, there is evidence of consistent success including being ranked first in the medals' table at Glasgow 2014, as shown in Table 4.

As well as noting the successes of those who achieved medals and creditable performances on the world stage, the future competitiveness of the NGBs looks assured with some 6,834 athletes known to be in the elite sport development system. These athletes range from being medal contenders in the next four years (c. 400); the next 8 years (c. 1,000); and beyond (5,400+). This pipeline of talent will ensure that as there is a continual supply of competitive athletes who will help to keep the nation punching well above its weight in world sport for years to come.



YEAR	EVENT	TEAM	MEDALS WON	RANK
2014	European Athletics Championships	GBR	23	1st
2014	Commonwealth Games	England	EX Mail 27	4th
2014	IPC European Championships	GBR	52	3rd
2014	European Cross Country Championships	GBR	9	1st
2014	World Indoor Athletics Championships	GBR	6	4th
2014	World Mountain Running Championships	GBR	2	n/a
2014	European Mountain Running Championships	GBR	5	n/a

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# 6. HOSTING MAJOR SPORTS EVENTS

Area Question

MAJOR EVENTS | NUMBER OF MAJOR EVENTS HELD

Answer 317

Economically, major sports events can have a positive economic impact on the host location and in the case of events that attract visitors from overseas, an invisible export effect (UK Sport 2007). Furthermore, major sports events can improve the quality of life for local residents, particularly when government provides infrastructure investment in support of event delivery. These benefits include enabling the public to see the best of world sport on home soil and creating a national 'feel good' factor on the back of successful performances by home grown athletes. There is also evidence to show that major events can inspire spectators and television viewers to take part in sport or to become more physically active (UK Sport 2011). In partnership with relevant local and national stakeholders, NGBs have been the driving force in bidding to host these events and then delivering them.

Hosting major sports events is increasingly recognised (de Bosscher et al 2006) as an important ingredient of an elite sport development system. Providing athletes with the opportunity to compete on home soil with the benefit of home crowds can make the difference between merely qualifying for a final and winning a medal (UK Sport 2008). In London 2012 Team GB built on its spectacular success in Beijing by using home • advantage to win 18 more medals, of which 10 were gold, and to achieve third place in the final medals' table. Events also provide a platform for volunteers and officials to

hone their skills and for positive images of host locations to be seen across the globe, as well as strengthening the position of the nation's NGBs within their global umbrella organisations.

The State of Play audit quantifies the number of events they have hosted in England over the last six years at European and World levels. The headline results are shown in Table 6 and exclude major multi-sport events such as the Olympic and Paralympic Games.

Overall 95 European and 222 World level events have been staged in England by NGBs between 2009 and 2014. Notable highlights since London 2012 include the 2013 Rugby League World Cup where significant research projects have been undertaken to examine a range of impacts and some of the highlights are listed below.

2013 Rugby League World Cup

- Economic impact on London £12.3m for hosting double header semi-finals
- Economic impact of £8.4m on Manchester for hosting Final
- 300 people were new to volunteering
- 12,600 ticket purchasers were inspired to take up Rugby League or to play more frequently
- 83% of spectators said the event gave them pride in their country
- 18.8m viewers in England, France, Australia and New Zealand watched television coverage of the event.

UK Sport (2007) Measuring Success 3: The economic impact of six major sports events supported by the World Class Events Programme in 2005 & 2006, UK Sport, London. UK Sport (2011) The inspirational effect of major sporting events, UK Sport, London. De Bosscher, V., De Knop, P., Van Bottenburg, M. and Shibli, S. (2006) A conceptual framework for analysing sports policy factors leading to international sporting success, European Sports Management Quarterly, vol. 6, no. 2, pp185-215. UK Sport (2008) Home Advantage: The Performance Benefits of Hosting Major Sporting Events, UK Sport London.



they are being staged in England represents positive endorsement of the nation's ability to host events and the international sporting community's confidence in the infrastructure and organisational ability available here. It is perhaps no surprise that Great Britain is enjoying an increased level of influence in

international sport as discussed next.

**ENGLAND HOCKEY** 

#### **Impact**

40% increase in young people playing Hockey in our clubs from 35,000 in 2011 to over 50.000 in 2015.

#### How

## Table 6: European and World level events hosted in England 2009-2014

TYPE	2009	2010	2011	2012	2013	2014	TOTALS	AVERAGE
European level events	15	15	16	17	18	14	95	16
World level events	41	37	45	47	41	11	222	37



# 8. CONCLUSIONS

The CEO Forum's NGBs have answered 10 questions to provide an insight into the State of Play. The membership has helped to deliver growth in grassroots participation, particularly enabling people to play more sport. It has realised the importance of developing the supply side of sport, notably clubs, an army of 1.9m volunteers, and schools. The positive trend in increased participation levels since the first Active People Survey in 2005/6 appears to be linked with this work.

London 2012 demonstrated the collective capacity and know-how to deliver major sporting events with an emphasis on wider social benefits and participation legacy. The subsequent award of future major sporting events on the back of the success of London 2012 provides further evidence of the international sporting community's confidence in Great Britain and our growing influence in international sport.

The 2012 Olympic Games were Britain's most successful in the modern era and it is testament to the quality and quantity of elite athletes being produced that the goal is to improve on this success in 2016.

NGBs on the Forum should therefore be optimistic in their outlook as we reach the half way stages in the current Sport England and UK Sport funding cycles.

In what way does the State of Play help the CEO Forum to announce its arrival and demonstrate the work and value of NGBs to the sport sector?

- We are here and we represent the majority of funded NGBs and the majority of national level investment in sport:
- We are helping to deliver growth in grassroots participation;
- We are developing the supply side of sport;
- We have an army of 1.9 million volunteers which is larger in number than the entire staff of the NHS;
- We are the guardians of competitive sport and under our watch an average over 8,000 sporting competitions take place every day;
- We make a wider contribution to society through improved community cohesion and social capital;
- We delivered considerable success in London 2012 and continue to be successful in a wide range of Olympic, Commonwealth, and other sports;
- We have an extensive pipeline to maintain elite sport success;
- We know what we are doing with major sports events in terms of delivery, wider benefits and legacy
- We have increased our influence in international sport
- We have been, and continue to be, proactive in the way we do business.

We are helping to deliver growth in grassroots participation.

We have an extensive pipeline to maintain elite sport success.

We are the guardians of competitive sport.

We have increased our influence in international sport.





# 9. A MESSAGE FROM THE CEO FORUM

The State of Play research demonstrates the significant role, reach and impact of NGBs in growing sports participation, winning medals, bringing major sporting events to the UK, developing community sports clubs and training and deploying volunteers and coaches across the country. The impact of our work transcends the sporting landscape and touches much wider social and economic agendas – something that, as a group, we are enormously proud of. Our 39 member sports want to celebrate this incredible progress and impact.

We also want to thank the National Lottery, government and our key stakeholders for the investment we have received over the last decade that has been so instrumental in our journey to much greater professionalism, focus and impact. In particular, we want to say a massive thank you to the millions of volunteers, coaches and sports clubs and associations for helping us to achieve all that is outlined in State of Play.

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that is outlined in State of Play.

With just weeks to go until the General Election, all our members are committed to working constructively with whoever is in Government to ensure that:

- NGBs remain at the heart of the sports system for both elite and community sport;
- NGB funding is maintained to enable us to build on the significant progress achieved over the last decade;
- NGBs continue to grow and develop the huge reach and impact of their volunteer force, which is currently worth £5 billion to the delivery of sport in England; and
- There is an overall vision created for sport across the country that aligns all stakeholders in central and local government with NGBs and others in the sporting landscape.

A huge amount has been achieved in sport at all levels over the last decade with NGBs being the glue at the centre of an increasingly professional and effective system. And with continued investment and vision, so much more can be done. NGB Forum members look forward to playing their part in the next successful chapter of British sport.



agendas positions of influence in 2014.



expanded to include the weekend, charity events and Indoor Rounders

the community and sessions

Sarah quickly found a pocket of interest within

#### **GROWING GRASSROOTS ROUNDERS**

#### Sarah Harwood

Sarah wanted to play Rounders but couldn't find an established team or league or a venue who offered Rounders sessions in her local area. As she was keen to rekindle her love of her favourite school sport, she initiated the first steps to find out how she could go about setting up Rounders.

With the help of Blackburn Community
Sports Club Sarah accessed a Rounders
Activator course. Supported with her
knowledge from the course, the Rounders
Toolkit and a facebook page, she started to
promote her sessions and through word of
mouth was greeted with 25 women on the
first session.

Sarah quickly found a pocket of interest within the community and sessions expanded to include the weekend, charity events and Indoor Rounders. While there is every sign that interest is increasing, Sarah's next challenge is to set up a league in Darwen & Blackburn.

The following sports make up the CEO Forum:

ARCHERY
ATHLETICS
BADMINTON
BASKETBALL
BOCCIA

BOWLS BOXING

CANOEING

CRICKET CYCLING

**EQUESTRIAN** 

FENCING FOOTBALL

GOALBALL

**GYMNASTICS** 

HANDBALL HOCKEY

JUDO

LACROSSE

**MOUNTAINEERING** 

NETBALL

**ORIENTEERING** 

ROUNDERS

ROWING

**RUGBY LEAGUE** 

**RUGBY UNION** 

**SHOOTING** 

**SNOWSPORT** 

**SQUASH & RACKETBALL** 

TABLE TENNIS
TAEKWONDO

**TENNIS** 

TRIATHLON

**VOLLEYBALL** 

**WATER-SKI & WAKEBOARD** 

WEIGHTLIFTING

WHEELCHAIR BASKETBALL

WHEELCHAIR RUGBY

WRESTLING

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