

Enriching our understanding of less active Londoners to target and tackle inactivity

Webinar 1: Segment Introduction 12th June 2019

Your speaker



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Senior Insight Manager
and Segmentation Lead



London Sports objective

To help London become the most physically active city in the world by focussing on the 2.6m less active Londoners (i.e. those less active than 150 mins per week)



Segmentation vision and objectives

To enrich understanding of less active Londoners and develop resources for more effective targeting, engagement and outreach



Develop a stronger sense
of instinct, empathy and
understanding



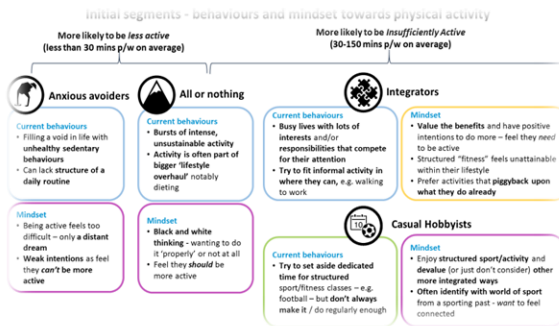
Determine segment
representation and relevant
opportunities to connect



Develop knowledge of best
practices and improve
communications

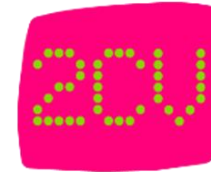
Our holistic two phase approach

Working with independent research agencies we have combined qualitative and quantitative insight for a richer more holistic perspective

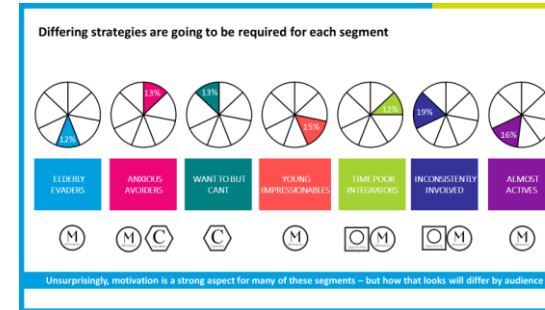


Phase 1 Qualitative foundation Key facts

- 4 'core' segments identified
- In home interviews and online mission diary tasks
- Pen portraits and showreels developed to bring segments to life
- Internal London Sport stakeholder workshops



Phase 2 Quantitative validation Key facts



- 7 segments deduced using factor and cluster analyses
- Online survey based methodology to determine segments focussing on mindset attitudes and behaviours
- n=2000 sample of less active adults aged 16+, living and /or working in London

Introducing the segments

LONDON
SPORT

London's seven less active segments

LONDON
SPORT

ELDERLY
EVADERS



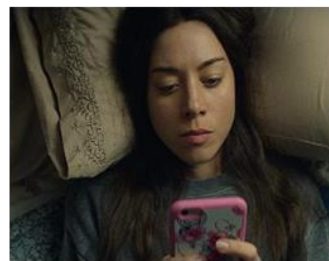
ANXIOUS
AVOIDERS



WANT TO BUT
CANT



YOUNG
IMPRESSIONABLES



TIME POOR
INTEGRATORS



INCONSISTENTLY
INVOLVED



ALMOST
ACTIVES



Number of Londoners

310k

335k

335k

388k

310k

491k

413k

Elderly Evaders



55-74
64% (193)



Children in HH
23% (75)



Retired
41% (214)



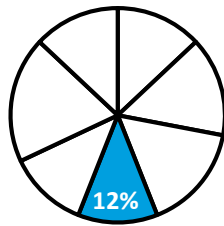
AVERAGE
AB 32% (120)



IN THEIR OWN WORDS...

“At the moment I do not want to be more active. Maybe if all those exercises and activities were fun and easy, I would start being more active”

“I don’t want to be more active. I have far more things to do. I prefer cerebral activities”

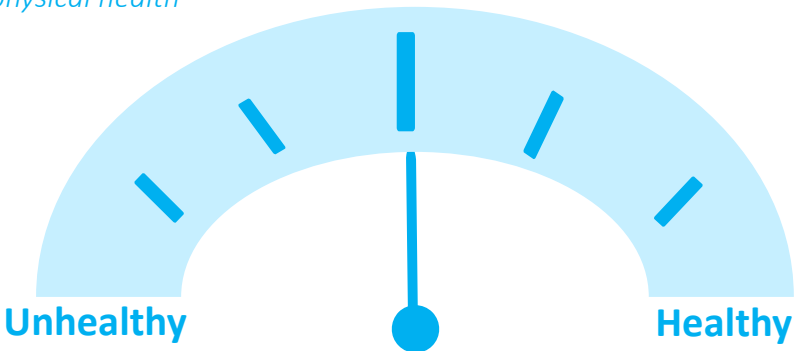


ACTIVITIES MAKE THEM FEEL...

UNINTERESTED	58% (294)
UNEASY	19% (99)
ANNOYED	7% (110)
REPULSED	5% (191)

PERCEIVED HEALTHINESS

Lifestyle, routine, mental/physical health



Elderly Evaders



55-74
64% (193)



Children in HH
23% (75)



Retired
41% (214)



AVERAGE
AB 32% (120)

TOP BARRIERS TO BEING MORE ACTIVE

I'd rather spend the free time that I have doing things I really enjoy

94% (181)

I know it's important but I don't feel it's urgent

64% (197)

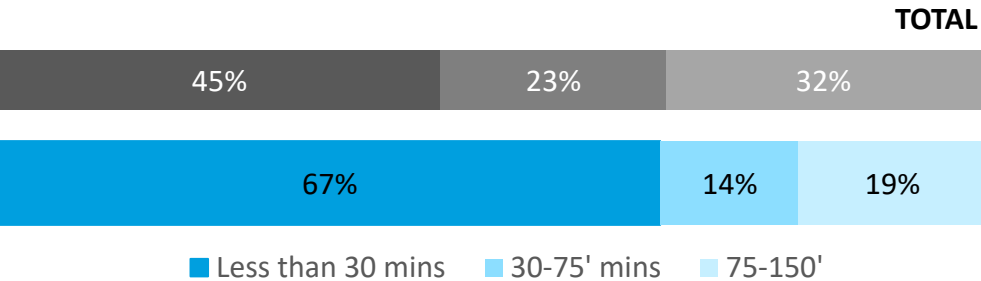
I would only exercise more if told to do so by my Doctor / GP

45% (262)

I don't see the point in exercising

33% (297)

AMOUNT OF TIME SPENT BEING ACTIVE



TOP ACTIVITIES



36%
Walk 10min
(69)



8%
Swimming
(47)



6%
Dance class
(61)

CURRENT BEHAVIOURS

44% 342

Not interested
in becoming
more active

Not thinking
about it

Getting prepared
to become more
active

Been more
active /
Trying to get
back

Made
proactive
steps

Trying to
become
more active

Keep active
no matter
what

Anxious Avoiders



45-64
47% (141)



Children in HH
27% (89)



PT / Home /
Unemployed
43% (133)



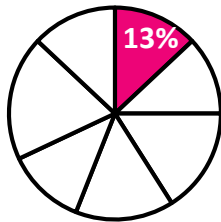
LOW
E 20% (140)



IN THEIR OWN WORDS

“Know I need to but can’t get the motivation. My friends are either very fit or not interested in starting so feel haven’t got anyone to start with”

“I am obese and have arthritis in knees and hips. This has been largely instrumental in my reluctance to take on board doing some fitness that is weight bearing”

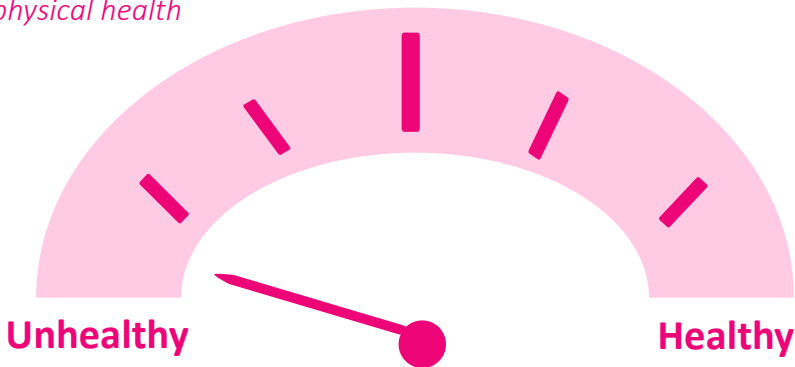


ACTIVITIES MAKE THEM FEEL...

UNEASY	51%	(267)
EMBARRASSED	40%	(283)
DESPAIRING	31%	(292)
HUMILIATED	17%	(328)

PERCEIVED HEALTHINESS

Lifestyle, routine, mental/physical health



Anxious Avoiders



45-64
47% (141)



Children in HH
27% (89)



PT / Home /
Unemployed
43% (133)

££ LOW
E 20% (140)

TOP BARRIERS TO BEING MORE ACTIVE

I just don't feel good doing physical activity

80% (261)

I'm not skilled or fit enough to be active

76% (268)

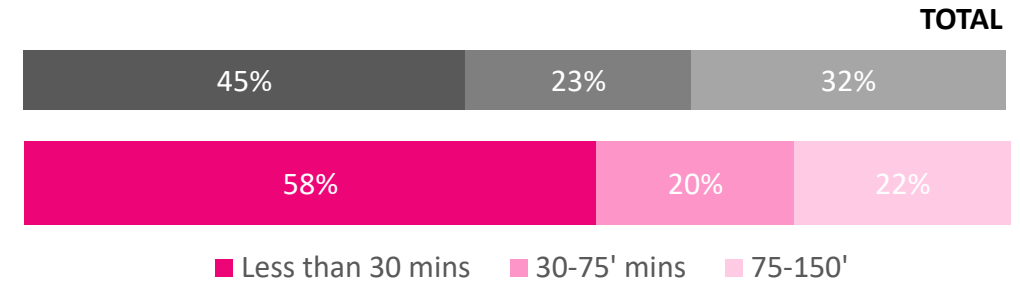
I don't even know where to begin

61% (247)

I don't know how to become more active

46% (252)

AMOUNT OF TIME SPENT BEING ACTIVE



TOP ACTIVITIES



45%
Walk 10min
(87)



13%
Swimming
(74)



11%
Home fitness DVD
(100)

CURRENT BEHAVIOURS

26% 174

Not interested
in becoming
more active

Not thinking
about it

Getting prepared
to become more
active

Been more
active /
Trying to get
back

Made
proactive
steps

Trying to
become
more active

Keep active
no matter
what

Want-to-but-can't

 65-74
33% (182)

 Children in HH
19% (67)

 Unemployed/
retired
59% (203)

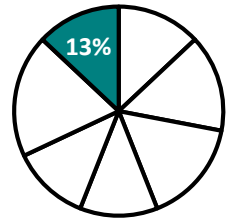
 **££** LOW
E 28% (194)



IN THEIR OWN WORDS...

“I have severe arthritis so exercise is an issue for me, I do as much as I feel able to but I would like to be able to do more in the future”

“As a disabled person, I would enjoy the company of other people working together to get fit in a relaxed friendly atmosphere, but I would need transport to access such an activity”

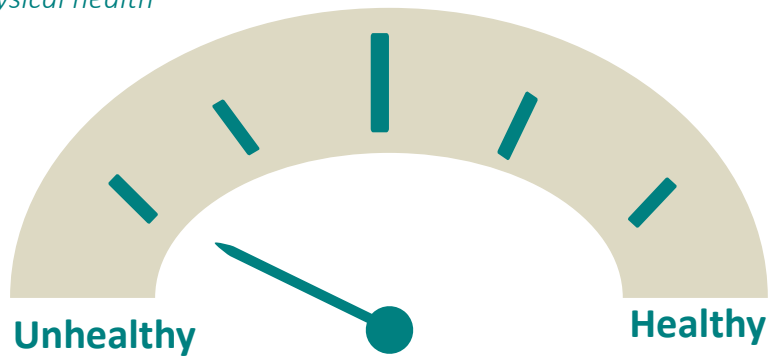


ACTIVITIES MAKE THEM FEEL...

DOWNHEARTED	26% (200)
DESPAIRING	25% (234)
ANNOYED	11% (174)
HUMILIATED	8% (163)

PERCEIVED HEALTHINESS

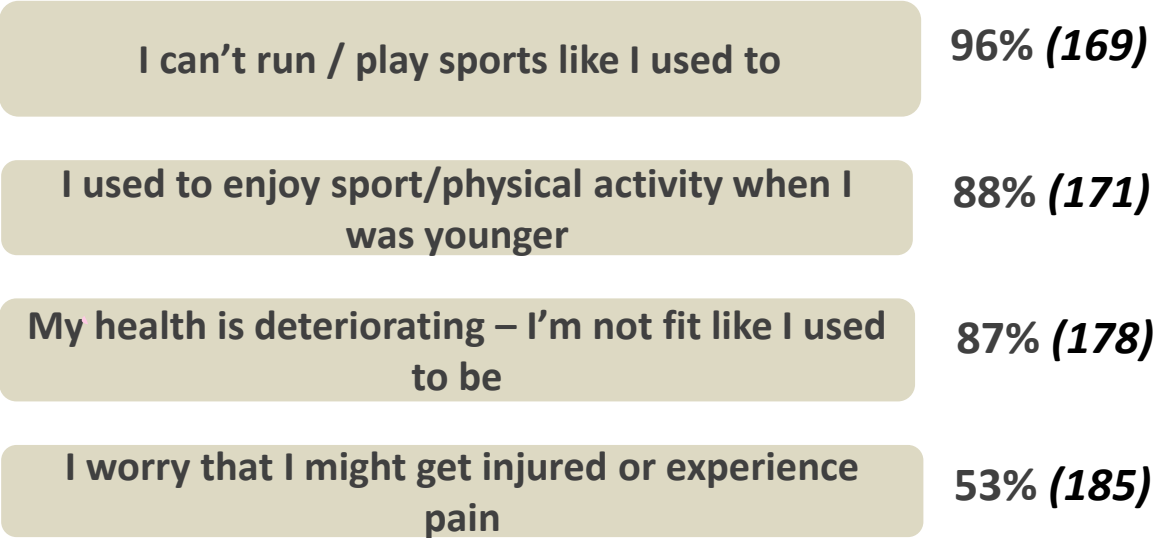
Lifestyle, routine, mental/physical health



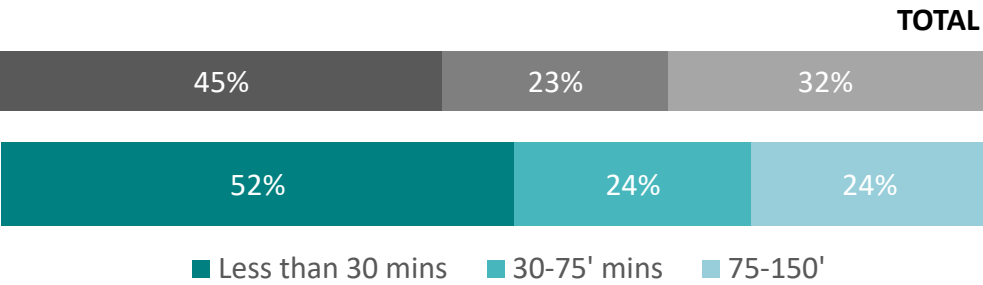
Want-to-but-can't



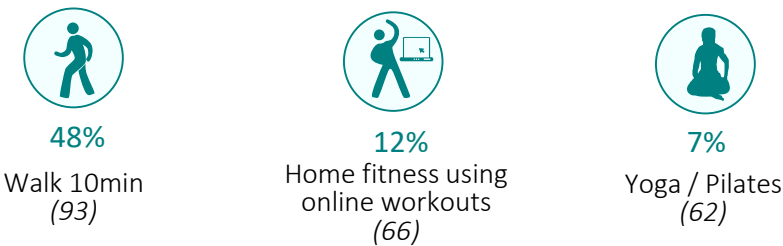
TOP BARRIERS TO BEING MORE ACTIVE



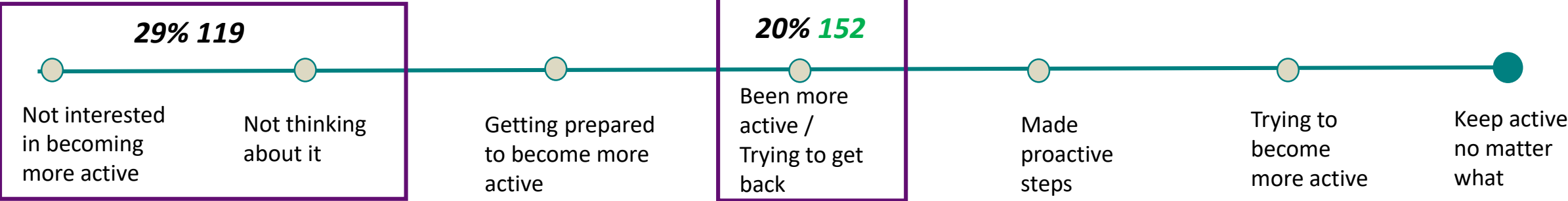
AMOUNT OF TIME SPENT BEING ACTIVE



TOP ACTIVITIES



CURRENT BEHAVIOURS



Young Impressionables



16-24
25% (176)



Children in HH
21% (70)



Student / PT
34% (106)

££
AB
C1

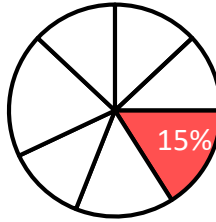
AVERAGE
70% 116



IN THEIR OWN WORDS...

‘I need in addition to professional advice somebody who could monitor my progress and encourage me on a regular basis’

“I wish there was a group of people the same fitness level as me that I could do exercise with and could afford it”



ACTIVITIES MAKE THEM FEEL...

INTIMIDATED	34%	(208)
EMBARRASSED	27%	(192)
JUDGED	24%	(206)
SHY	21%	(187)

PERCEIVED HEALTHINESS

Lifestyle, routine, mental/physical health



Young Impressionables



16-24
25% (176)



Children in HH
21% (70)

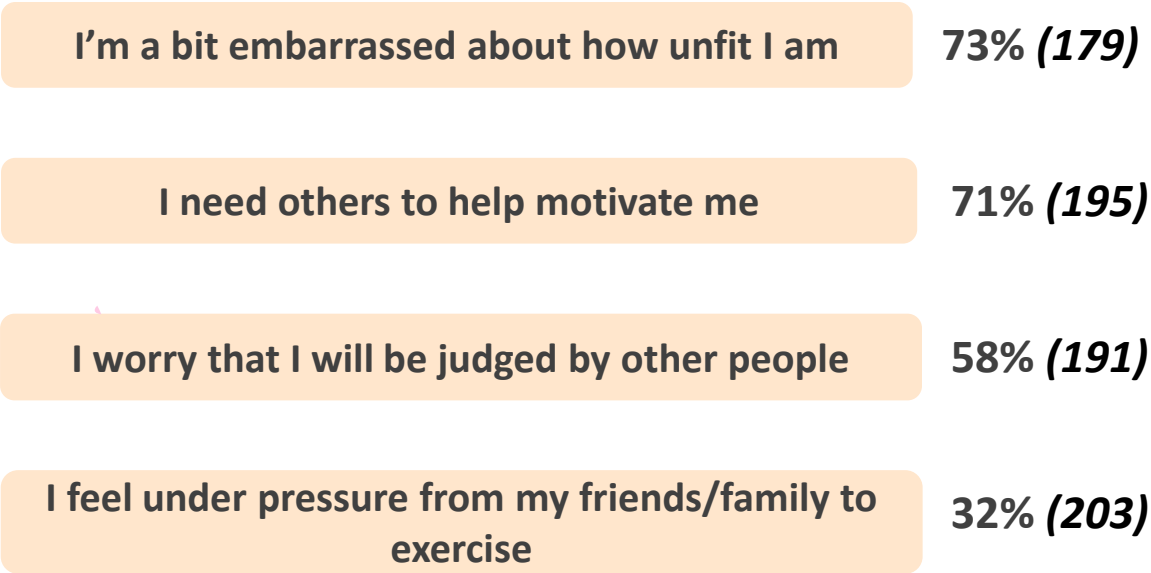


Student / PT
34% (106)

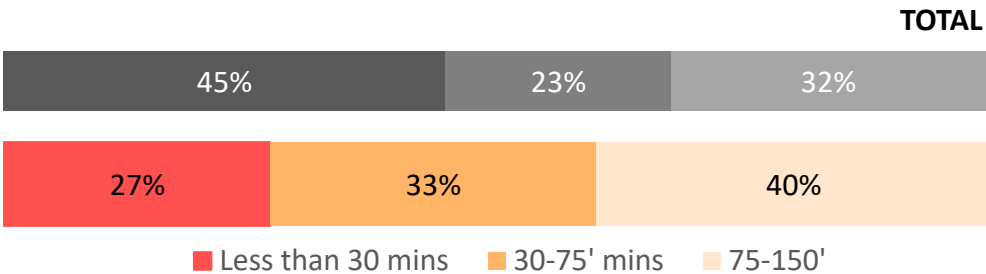


AVERAGE
AB
C1 70% 116

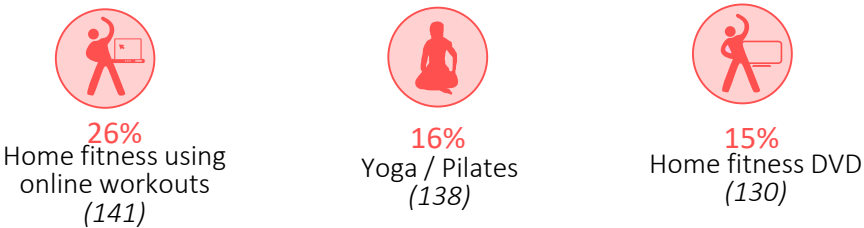
TOP BARRIERS TO BEING MORE ACTIVE



AMOUNT OF TIME SPENT BEING ACTIVE



TOP ACTIVITIES



CURRENT BEHAVIOURS



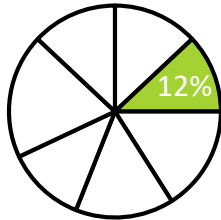
Time Poor Integrators



IN THEIR OWN WORDS

"I need more hours in the day! Working full time, very active kids and household responsibilities keep me busy from 6.30am until 10pm Mon-Sat"

"The expense of things holds me back. I prefer to keep fit whilst having fun or learning a skill e.g. Dance lessons, however these are expensive"



ACTIVITIES MAKE THEM FEEL...

MOTIVATED	33% (160)
ENERGISED	29% (181)
EXCITED	28% (182)
RELAXED	22% (132)

PERCEIVED HEALTHINESS

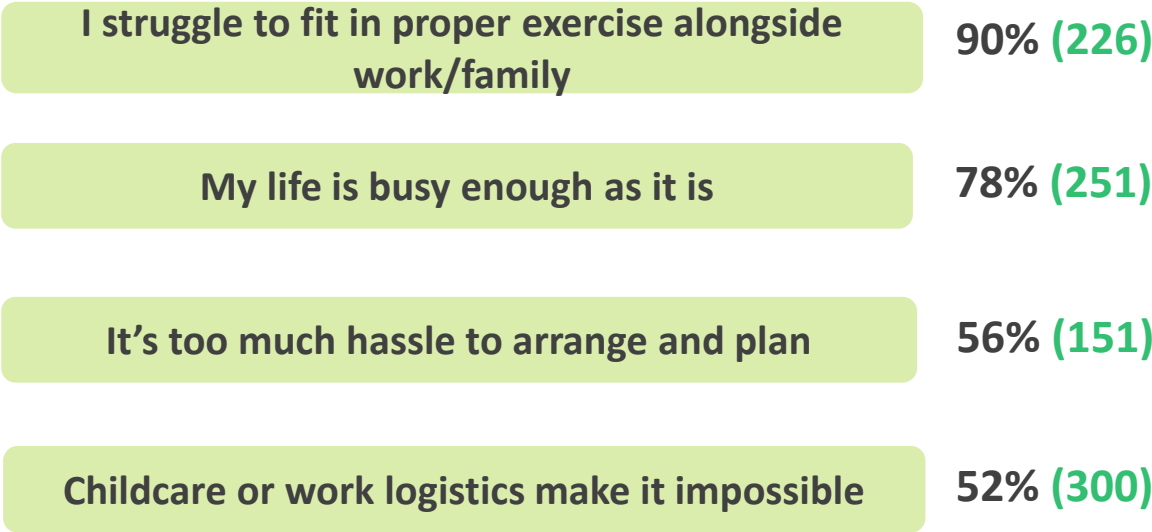
Lifestyle, routine, mental/physical health



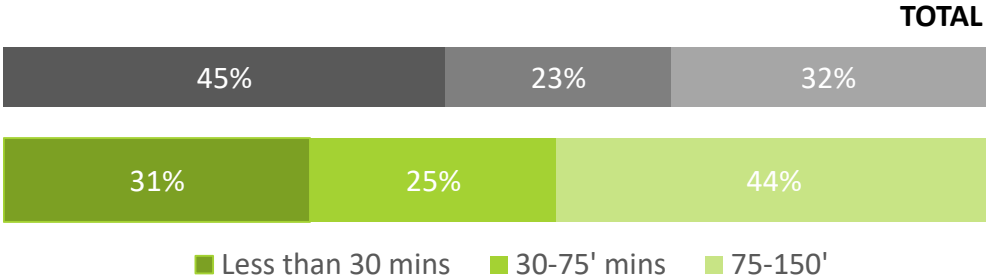
Time Poor Integrators



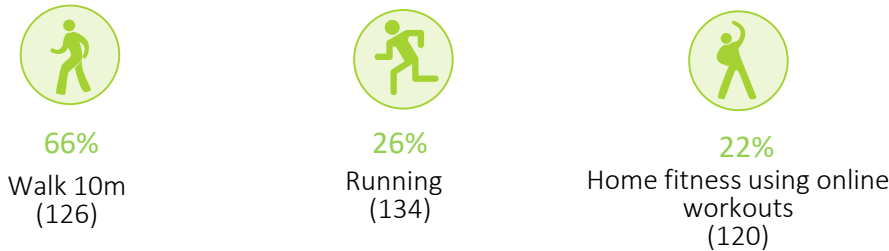
TOP BARRIERS TO BEING MORE ACTIVE



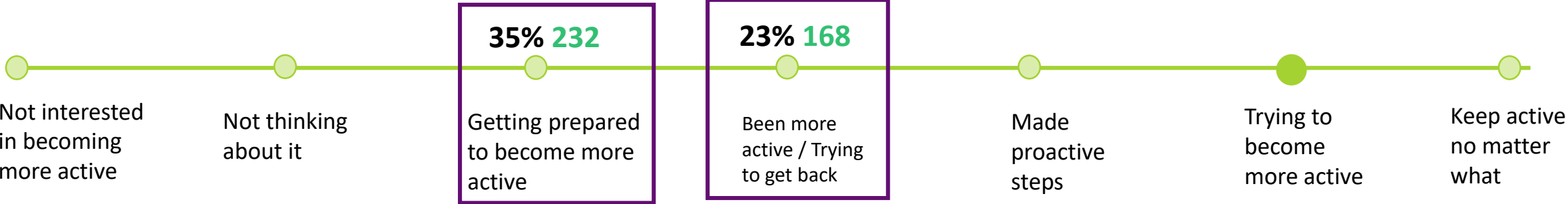
AMOUNT OF TIME SPENT BEING ACTIVE



TOP ACTIVITIES



CURRENT BEHAVIOURS



Inconsistently Involved



25-44
23% (134)



Children in HH
40% (130)



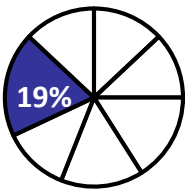
Work FT
55% (134)

££ AVERAGE
C2 41% (116)
DE



IN THEIR OWN WORDS...

“I would need to balance work/home and me life. If I could have an incentive such as quicker results that are guaranteed or coupons that would make a massive difference”

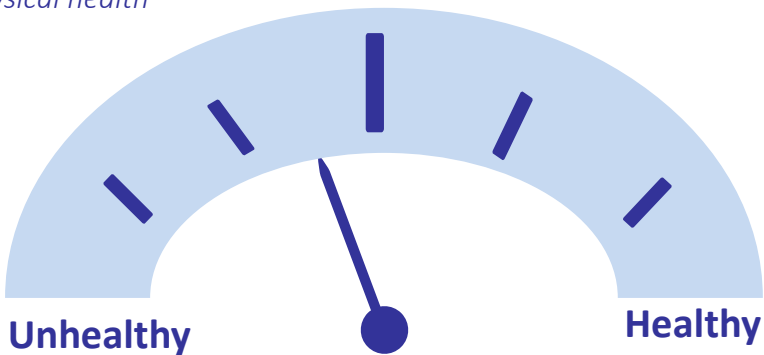


ACTIVITIES MAKE THEM FEEL...

RELAXED	20% (124)
EXCITED	18% (116)
CHEERFUL	16% (134)
ENERGISED	16% (103)

PERCEIVED HEALTHINESS

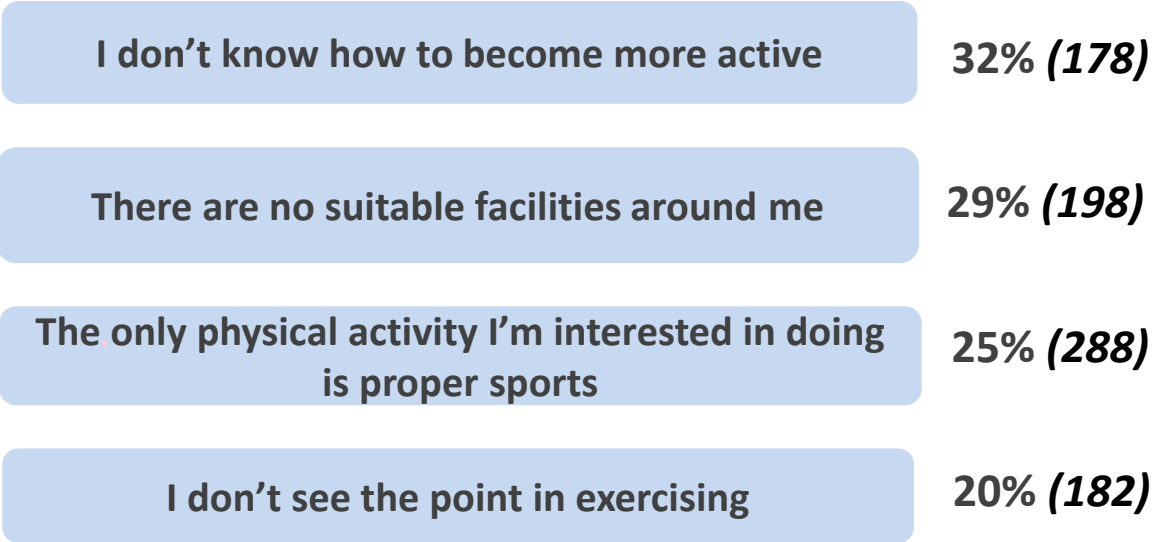
Lifestyle, routine, mental/physical health



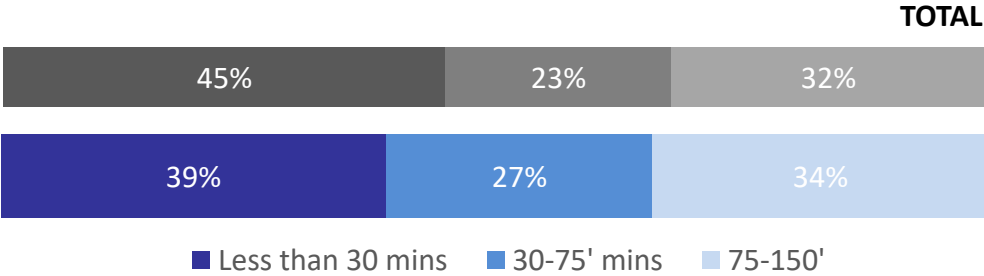
Inconsistently Involved



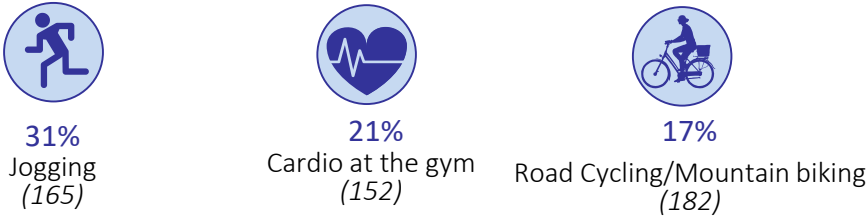
TOP BARRIERS TO BEING MORE ACTIVE



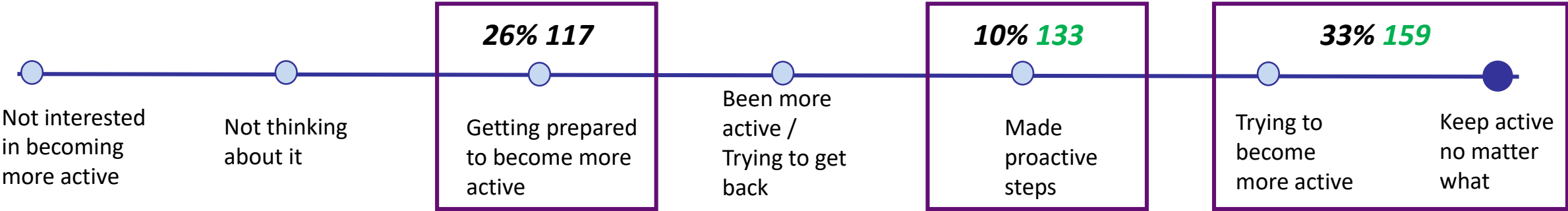
AMOUNT OF TIME SPENT BEING ACTIVE



TOP ACTIVITIES



CURRENT BEHAVIOURS



Almost Actives



16-44
48% (99)



Children in HH
27% (87)



Work FT
42% (101)



B

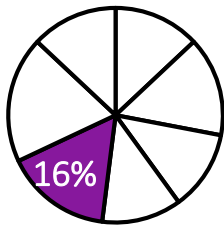
HIGH
26% (122)



IN THEIR OWN WORDS...

“I’m already sufficiently active on a regular DAILY basis. Not looking for change”

“Easier ways to find out about exercise groups in my area. I have been looking but can only find expensive gyms or personal trainers”

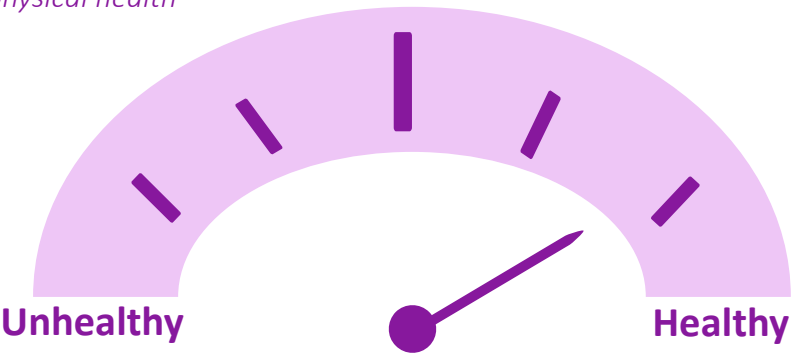


ACTIVITIES MAKE THEM FEEL...

MOTIVATED	45% (215)
ENERGISED	34% (216)
RELAXED	32% (196)
EXCITED	31% (207)

PERCEIVED HEALTHINESS

Lifestyle, routine, mental/physical health



Almost Actives



16-44
48% (99)



Children in HH
27% (87)



Work FT
42% (101)



HIGH
B 26% (122)

TOP BARRIERS TO BEING MORE ACTIVE

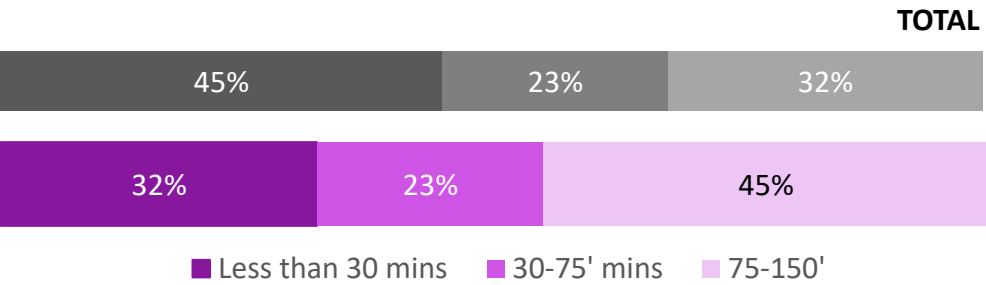
I have the opportunity to be more active 83% (157)

I find exercise a pleasurable activity 79% (239)

I'm motivated to be more active 78% (213)

I'm motivated by the prospect of 'small victories' when it comes to sport 61% (184)

AMOUNT OF TIME SPENT BEING ACTIVE



TOP ACTIVITIES



29%
Running
(146)

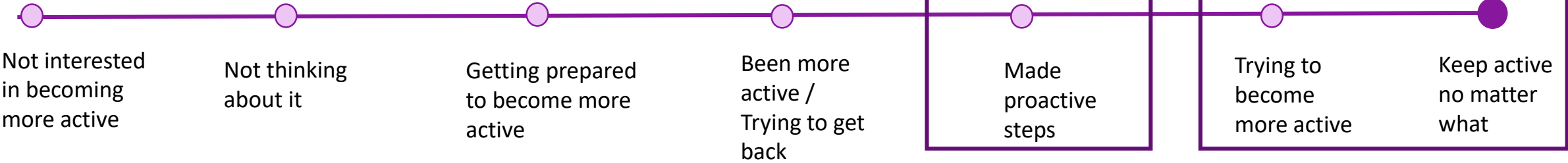


27%
Jogging
(147)



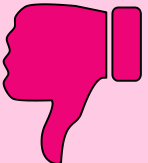

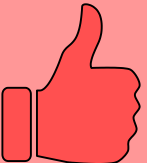
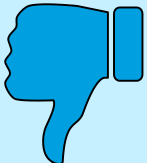


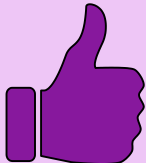
17%
Fitness class (e.g. Circuits)
(160)

CURRENT BEHAVIOURS



Segment behaviour and mindset summary

LONDON
SPORT

	ANXIOUS AVOIDERS	WANT TO BUT CANT	YOUNG IMPRESSIONABLES	ELDERLY EVADERS	TIME POOR INTEGRATORS	INCONSISTENTLY INVOLVED	ALMOST ACTIVES
Current levels of activity (out of 10) 4.3 AVG	2.5	3.3	3.8	4.0	4.4	5.1	6.0
Desire to be more active							
Emotions associated with activity	UNEASY EMBARRASSED DESPAIRING	DOWNHEARTED DESPAIRING ANNOYED	INTIMIDATED EMBARRASSED JUDGED	UNINTERESTED UNEASY ANNOYED	MOTIVATED ENERGISED EXCITED	RELAXED EXCITED CHEERFUL	MOTIVATED ENERGISED RELAXED
Motivation	Low activity, with low levels of motivation – likely driven by negative emotions	Low activity with a desire to do more though feeling frustrated about their ability to do so	Low activity – would like to be more active though some reticence due to embarrassment	Average activity with little desire to do more	Average activity, but real desire to do more as value the benefits	Higher activity but no strong desire to do more despite feeling quite positive about activeness	Highest activity currently and open to doing more as enjoy it

The most discriminating factors remain consistent with initial qual findings



Different strategies will be required to engage segments effectively

COM-B Model

LONDON
SPORT

ELDERLY
EVADERS



ANXIOUS
AVOIDERS



WANT TO BUT
CANT



YOUNG
IMPRESSIONABLES



TIME POOR
INTEGRATORS



INCONSISTENTLY
INVOLVED



ALMOST
ACTIVES



Number of Londoners

310k

335k

335k

388k

310k

491k

413k

Activation opportunities

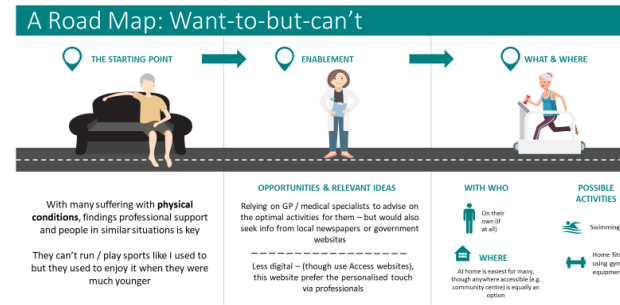
**LONDON
SPORT**

Insight Portal key resources

London Sport segmentation foundation resources



Segment profiles



Broad opportunity areas



Golden identifier questions

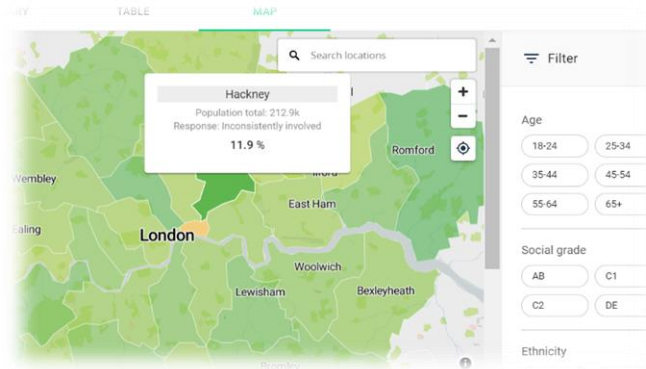
Materials available from 21st June
<https://data.londonsport.org/>

Insight activation working in partnership with London Sport

Our steering group, ongoing intelligence gathering, in-house tools and bespoke insight consulting services



Intelligence gathering workshops and events



In-house mapping tool and programme database



- Enrichment workshops
- Intervention audits
- Communication development
- Applied behavioural change techniques
- Impact and evaluation
- Co-creation

Team support and bespoke insight consulting

Contact insight@londonsport.org together with your Relationship Manager to discuss opportunities



Stay tuned for part 2!
19th June 3pm Segment Engagement Opportunities

Materials available from 21st June <https://data.londonsport.org/Insight@londonsport.org>



*It's about finding
your thing.
This is definitely
my thing.*

- Jess, 24

**LONDON
SPORT**

#MostActiveCity