

FUTURE TRENDS

INNOVATING TO GROW PARTICIPATION IN SPORT



**SPORT+
RECREATION
ALLIANCE**

FOREWORD

In every generation technology changes peoples' lives. The world someone is born into is not the same as the one they leave, with many leaps forward contributing to a brighter and better future.

The internet, a niche technology 25 years ago, is now arguably the greatest pillar needed for people to build happy lives – so much so that the United Nations has stated that access to the internet is a basic human right.

Change can be unexpected and technology often fills gaps that you never even realised were there. The challenge for us is to discover where that next leap forward is coming from.

Sport – including all types of recreational activities – are reflections of society and looking back through our recent past the evolution of many of our activities is easy to see.

From climbing in woollen suits in the fifties to the hydrophobic Gore-Tex shell fabric of 2014. From an Azerbaijani linesman in 1966 to high-speed camera goal-line technology now. As society has embraced change, as a sector, so must we.

The challenge now is to use technology to enhance lives. With the world teetering on the precipice of a physical inactivity time-bomb – what tech can haul us back from the brink?

As the seeds of change bring the opportunity for our sector to grow, so they also bring about uncertainty for many of our existing structures and practices.

As computer technology becomes more and more sophisticated, for example, what's to stop the next generation of people choosing to participate in their traditional outdoor sports from their own homes in a virtual reality environment?

But rather than fearing the unknown there is instead the chance to seize the opportunity that new technology may provide.

In this report the Future Foundation, the world's leading independent global consumer trends and insight firm, presents five trends that it believes will become more and more relevant to those of us in the sector alongside examples of where sport is already innovating.

There is now a window of opportunity for our sector to harness these trends to enhance the future. Only through preparation can we make sure that sport and recreation is part of the next leap and not just another footnote in the past.

Andy Reed OBE
Chair
Sport and Recreation Alliance

THE QUANTIFIED SELF

Smart technology is empowering consumers to collect and interpret real-time data about their daily lives for a more professional approach to lifestyle management.

Though there is no shortage of GPS fitness-tracking apps and dedicated health trackers on the market, the use of health tracking apps as yet remains a niche behaviour (the adoption rate is 8%).

However this trend comes into its own in the athletic arena, particularly as more integrated and intuitive ways to measure fitness and performance are developed. Measurement using now familiar biometric wristbands, such as FitBit Flex and Nike Fuelband, and their partner apps will soon seem as cumbersome as using stopwatches and notepads.

Thermal imaging cameras trackside can already capture heart rates remotely. Sensoria's line of bio-tracking (sensor

based tracking of people) clothing includes a sport bra, t-shirt and socks.

Self-quantification is not just about monitoring internal signals, but also mastering the finer points of sporting technique.

May 2014 saw the introduction of the first "smart" tennis racquet, which uses data collected by electronics in the handle to provide intelligent feedback on a number of metrics including number of shots played, the power and spin on each shot and the point at which the ball strikes the racquet strings.

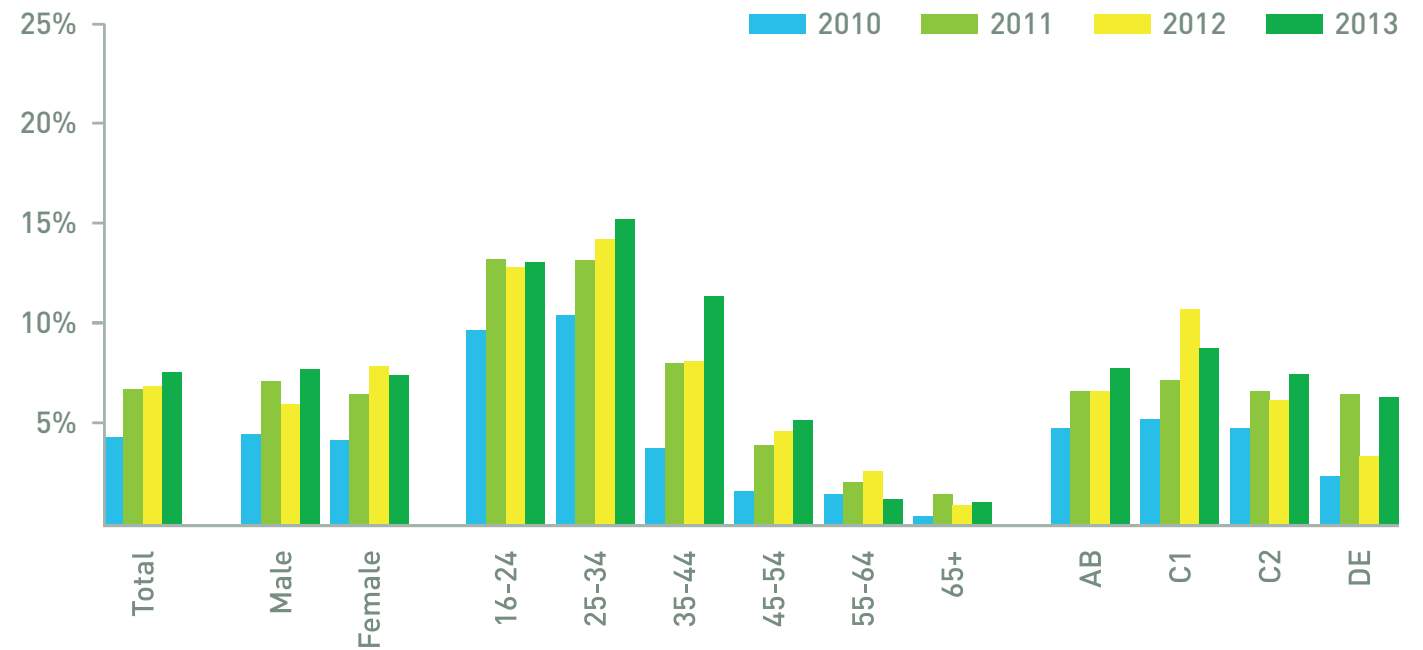
There is potential here for these sensor technologies to enhance the performance of high-level athletes, but also for amateurs to closer approximate these levels with minimal need for expensive personal coaching – a "Connected Racket" may be all the coach you need.

PERSONAL HEALTH TRACKING APPS

USAGE LOW BUT INCREASING

Which of the following kinds of apps do you use at least once a month?

Personal health-tracking apps eg calorie counters, running route markers | 2013



Source: nVision Research | Base: 5,000 online respondents aged 16+, GB, 2013

GAME ON



Once the behaviour of distinct subcultures, gaming has now gone mainstream. Close to 30% of people today say that they regularly use gaming apps and gaming mechanics have found their way into many walks of life, used by brands, governments and businesses to incentivise loyalty and stimulate engagement.

Games are powerful motivationally because they help participants see a narrative of personal improvement, drive competition and boost morale with instant and incremental rewards.

Points, levels, leaderboards, challenges... these are all dynamics familiar from the world of professional sport. But by leveraging new connected technologies to imitate these mechanics for a mass audience, national governing bodies can expose the average participant to the competitive motivations of professional athletes, consolidate the identity of new sports and incentivise spectating

non-participants (the “Fantasy League” crowd) to get involved.

Moreover, the external motivation of game progression segues into the internal motivation of personal fulfilment when users are able to customise the system to create game-goals that fall in line with their own interests.

Fitocracy, for example, is an online game and social network which uses points and achievements to motivate users to complete exercise-based challenges. Users can start following other users, comment on their exercise sessions and also give them “props”: equivalent to “likes” on Facebook. Friends aside, some services even allow users to “play against” their heroes.

The Red Bull Personal Best challenges budding mountain bikers to beat times set by MTB (Mountain Terrain Biking) champions Rachel and Gee Atherton.

CASE STUDY

BATTLE BADMINTON

BADMINTON ENGLAND



Battle Badminton is an online badminton ladder league and social platform which facilitates games between casual players – encouraging participants to play more regularly.

Battle Badminton takes social badminton to the next level, letting users find new players as well as issue and accept challenges to “battle” it out for pride on court in singles or doubles matches.

Aimed at males between 25-45 years’-old, Battle Badminton draws on themes from popular TV shows and video games to reach its target audience. It is the first attempt by a national governing body to create its own social platform.

Find out more: badmintonengland.co.uk/battle

THERE ARE TWO ELEMENTS TO THE BATTLE BADMINTON PLATFORM:

1. A functional platform allowing individuals to set up games and be ranked nationally.
2. A social platform allowing individuals to interact – adding an additional element of enjoyment.

Battle Badminton players earn points each time they get on court and local and national leader boards mean players can rise through the Battle Badminton ranks and achieve one of the nine status levels.

In the first six months Battle Badminton had over 3,200 registered users. It’s steadily growing and continues to evolve according to user input.

Badminton England wants to be responsive to the market and is now planning the next phase of promotion and development – including enhancing the use of the social platform.

This will include the addition of an “Upper Realm”, a separate social area for more committed players throughout the off-season and the potential creation of a “Junior Realm” for under-18s.

Badminton England is also working on how to include a badminton offer within fitness apps (eg Strava) to provide participants with data about their performance. This is part of a long-term strategy to enhance the user experience through technology.



HEALTHY HEDONISM

In an age of austerity, there is no denying that the pleasure-seeking impulse still exists. Consumers are not willing to sacrifice indulgence for the sake of health benefit in their consumption habits – but this impulse must take new, socially acceptable forms.

Social status is up for grabs for those seen to be in command of their personal development, appearance and fitness. Today, the idea that health-consciousness need be boring has fallen by the wayside, and any modern indulgence must have a health-centred proposition. We can expect these developments to affect sports participation.

Impulsive, physical, potentially novel – sport shares many of the characteristics of indulgence. Furthermore, as involvement in formal, timetabled sports activities becomes increasingly difficult to schedule into busy modern lives, moments on

the pitch or court are being themselves viewed as luxuries (particularly as an alternative to the gym).

The growing popularity of “breaks with benefits”, particularly those holidays incorporating sports training, is best understood in the context of the citizen’s desire for self-improving new experiences, even in their leisure hours.

At the same time, when half of 16-24-year-olds say they feel under pressure to look as good as they can, expressed motivations for pursuing sport and exercise today are more likely than ever to include some element of vanity and body-consciousness.

Innovations in surgery and quick-fix beauty products lessen the need for consumers to invest considerable time and energy exercising. The sports world must respond to this.

PERFORMATIVE PERFECTION

Gamification is the concept of applying video game mechanics to engage and motivate people to achieve their goals, and its appeal is rooted in the consumer-citizen's desire for peer recognition. 66% admit to satisfaction when their online posts are acknowledged.

"Life-logging" (running a 24/7 video diary from a wearable device) and advances in underwater photographic technology are both technological drivers that are fuelling this trend on.

Innovation in the way in which people interact, particularly online, is also driving innovation in sports being played. As users frustrated by the impersonality of their swelling friends lists and news feeds, migrate from sites such as Facebook purposefully to conduct smaller conversations based around specific needs, interests and social groups, so niche platforms such as

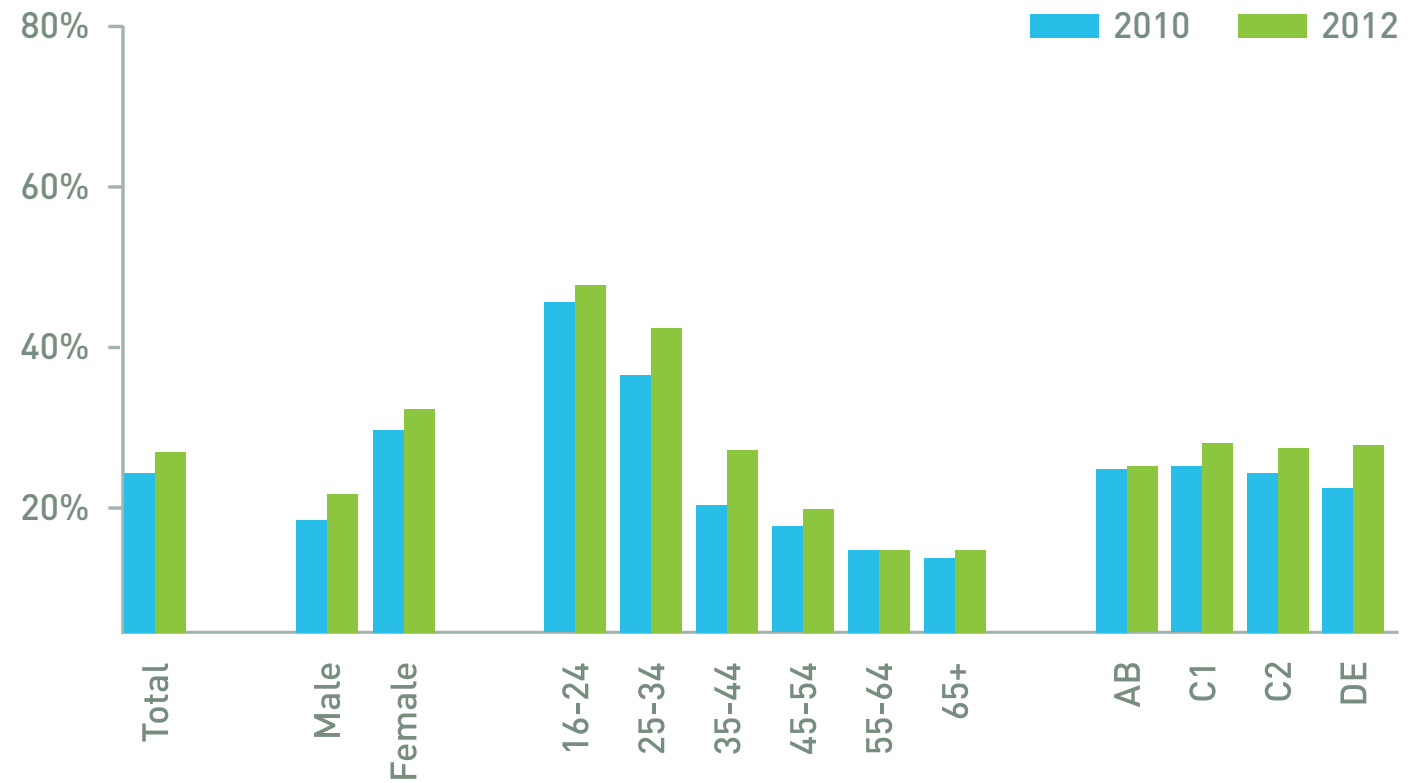
Nike SB – a digital space for skateboarders to chat – gain traction and relevance.

Similarly, as standards of professional athleticism are perceived to move further beyond the point of demoralising unattainability, a growing sector of new sports will open up to the amateur with a thirst for competition but without the time, inclination or disposition to challenge established champions.

England Hockey's Rush Hockey programme, with its pared down teams and simplified rules, fitness-centric sport spin-offs like the LTA's Cardio Tennis, restyled sports incorporating elements of dance/martial arts...these upstart sports, popularised by online communities, are inclusive and accessible, emphasising fun, friendship and health benefit over technique, dedication and rigour.

“I FEEL UNDER PRESSURE TO LOOK AS GOOD AS I CAN”

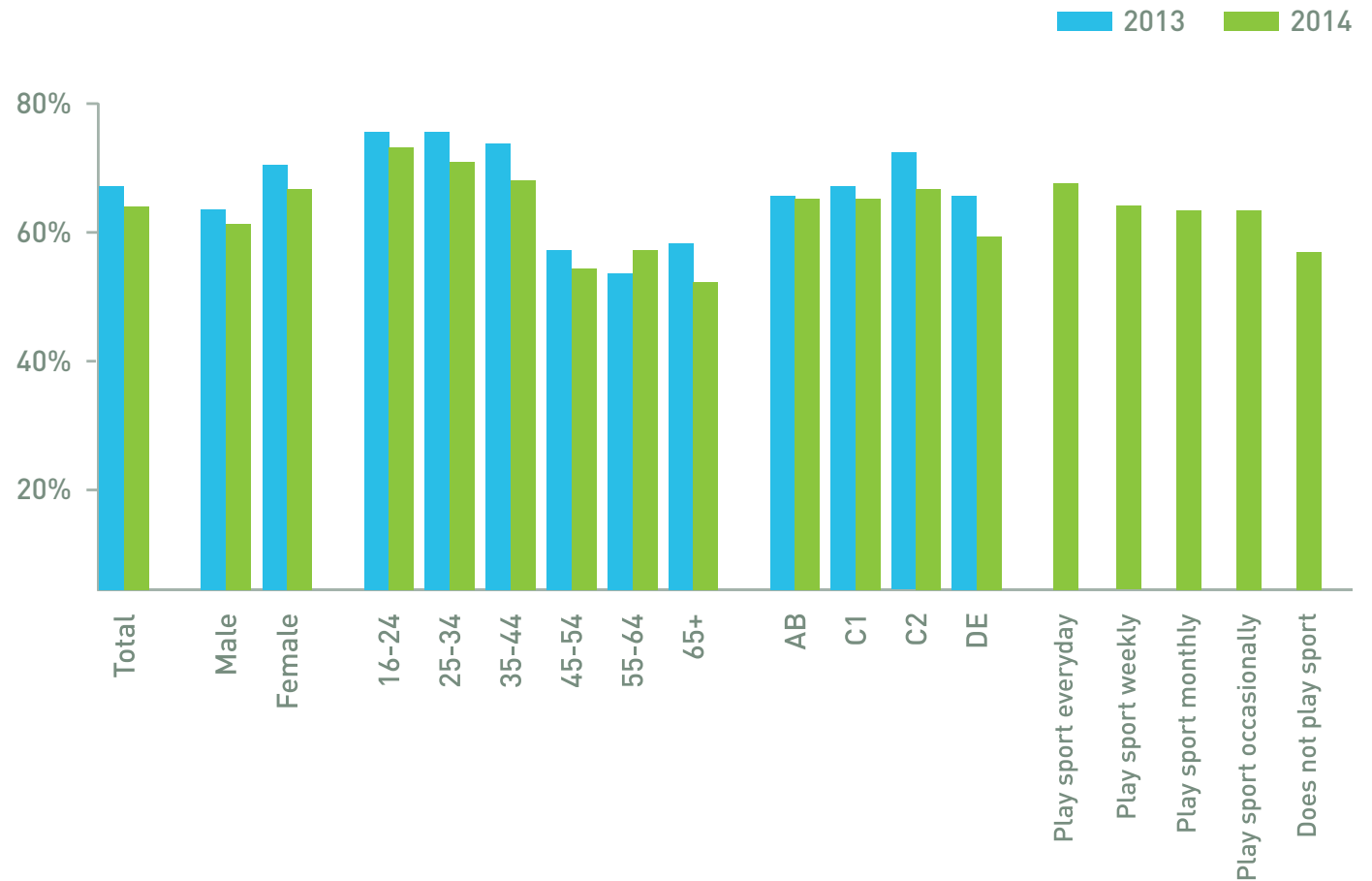
% who agree or agree strongly | 2012



Source: nVision Research | Base: 1,000-5,000 online respondents aged 16+, GB, 2012

“I LIKE IT WHEN PEOPLE ACKNOWLEDGE MY POSTS/PHOTOS/COMMENTS ON SOCIAL NETWORKING SITES”

—————
 % of social networkers who agree or agree strongly | 2014



CASE STUDY CARDIO TENNIS

LAWN TENNIS ASSOCIATION



Cardio Tennis is a tennis-inspired group exercise class offering a full-body workout for people of all ages and abilities.



Find out more: lta.org.uk/cardiotennis



Originally developed in the USA in 2005 as a solution to falling participation, the Lawn Tennis Association (LTA) launched Cardio Tennis in the UK in 2013 as a response to the growing demand for hybrid exercise classes.

Like other hybrid exercise classes such as Boxercise and Spinning, the focus is on providing a fun workout session rather than improving tennis technique, although participants are able to develop tennis skills.

Up to 16 people in any session can participate and workouts are run at a high-intensity with music.

A key ingredient in a Cardio Tennis session is the heart rate monitor given to every participant. This is a tool to engage people and provide instant data on performance.

Cardio Tennis is now running weekly in 850 venues around the country, providing sessions for 10,000 adult participants, as well as in schools where the LTA has trained teachers to be able to deliver sessions.

Since its launch in 2013, Cardio Tennis has been well-received due to its focus on fun and social interaction but has potential for further growth.



CULT OF THE HOME

Consumer spending on in-home leisure currently outstrips that of outdoor leisure by a factor of two, and forecasts suggest that the gap is set to widen in the coming years. By 2020 it is projected that 75% of Europeans will live in cities. Framed in these terms, the future of active, outdoor sport looks bleak.

However, 87% of citizens agree that “spending time out of doors is an important part of my life”. Catering to this need and taking their lead from the Wii Fit and Xbox Kinect, immersive in-home athletics technologies already exist which – while maintaining the comfort, safety and convenience of indoor leisure – closer associate the experience not just of being outside on the streets but of being a pro athlete on circuit.

BitGym for iPad for example upgrades the user’s cardio

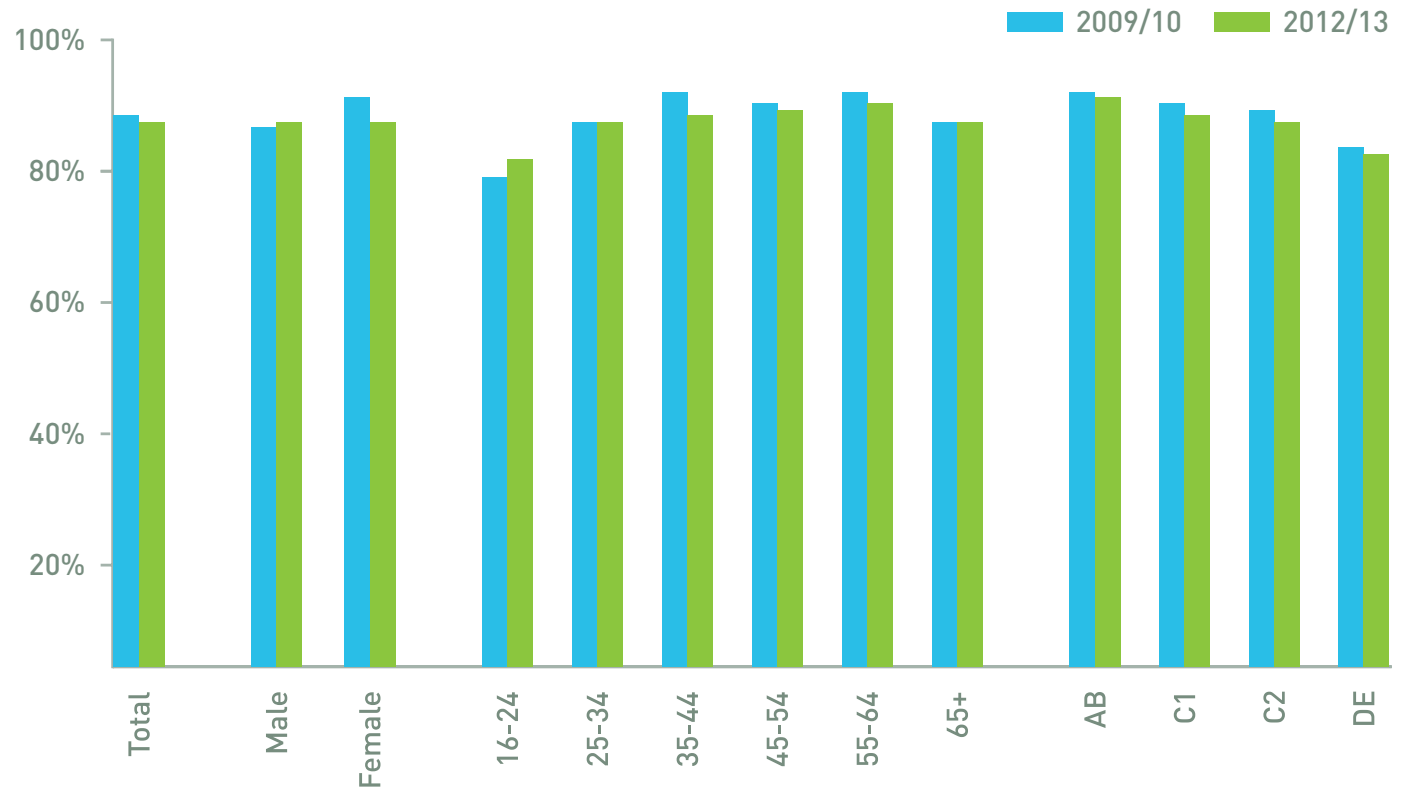
machine with interactive trails from around the world. The front-facing camera tracks the user’s movement, and integrates it with a moving visualisation of famous road rides and hiking trails.

The potential of this is boosted by augmented and virtual reality technologies such as Oculus Rift – a virtual reality headset. When workout meets wish fulfilment, the motivational potential for setting homebodies on the path to professional athleticism is significant.

For experienced enthusiasts, ever more sophisticated equipment and training tools are becoming obtainable on the average working person’s income. We ask – will tomorrow’s consumer be able to buy a hyperbaric (oxygen) chamber on a budget?

“SPENDING TIME OUT OF DOORS (INCLUDING MY OWN GARDEN) IS AN IMPORTANT PART OF MY LIFE”

% who agree or agree strongly | 2013



Source: Natural England/nVision | Base: 3,528 respondents aged 16+, England, 2013

AFTERWORD

Amongst tremendous change in the coming years, there will be constants. Sport and recreation will continue to inspire strong emotional connections and generate powerful nostalgia. Debate between technophiles and traditionalists is particularly heated when it comes to sport, hindering the adoption of innovations and, arguably, putting up a hurdle to wider participation. We do not see this changing any time soon.

Sport must remain a fundamentally human drama, with human performance in the foreground, but traditionalists argue that technology poses a threat to this. It distracts or detracts from what is most important in sport. While it cannot be said that there is no cause for concern here, to focus on the risks is to miss the fact that new technologies have the power to make high-level sport more accessible and rewarding to millions across the country.

This is a major challenge facing governing bodies going forward – how can technologies be used to supplement rather than supplant the human drama of sport, opening it up to fresh audiences

without alienating established supporters?

Innovations must disappear into the background. Play must be data-enhanced, but not predictable. Quantified Self devices must inform, but not bully. Digital referees and in-game statistics must be authoritative, but not too authoritative – punditry must survive. Optimisation after all is all very well and good, but if the fun isn't there, what's the point?

Drawing this line is the same as staying ahead of the curve, and is far from easy. Keeping a finger on the online social pulse is crucial. In any case, understand the online arena and you understand the motivations, inhibitions and passions of tomorrow's participants.

Right now, understanding the online arena means tracking the migration from "megaphone model" networks like Facebook to more specialised platforms for more intimate conversations, but habits are constantly changing.

These communities will be the home grounds for a new generation of sportspeople for

whom networked technologies are not new and disruptive forces but long-established parts of everyday life. They are also a group at risk of falling off the radar. Though young sportspeople are being entered into intensive sporting activities at ever younger ages, the standards set by pro-athletes are moving ever beyond the reach of most of us.

The result? Some young people are dropping out and giving up at ever younger ages, feeling ever sooner that they "don't have what it takes". The technologies discussed in this report may help to bridge the widening gap between amateur and professional, making quality coaching and support available to all.

With so many new entertainments and technologies demanding the attention of young people, the relevance of play going forward will be challenged if advocates fail to adapt. However, harnessed appropriately within an open-minded but grounded culture of innovation, there is potential for new technologies not merely to disrupt, but to enthuse,

inspire and impart fundamental, unchanging sporting values to those currently most at risk of missing out.

SO WHAT DOES THE FUTURE HOLD?

We'd like to hear your thoughts on the themes covered in this report. Is sport innovating? Do you have any examples of sports organisations who are using innovative technology effectively to increase participation?

Share your thoughts on Twitter using **#future4sport**
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The **Sport and Recreation Alliance** is the UK umbrella body for sport and recreation representing over 320 members like The FA, the Rugby Football Union, British Athletics, the Ramblers and the Exercise Movement and Dance Partnership. Our role is to represent their views and provide vital services and thought leadership, to make their lives easier.

Visit: sportandrecreation.org.uk

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