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# STATE OF THE SPORTING NATION





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## THE STATE OF THE SPORTING NATION

- The impact of the economic climate upon consumer choices
- The importance of keeping the people who try sport
- The need to make sport easy to choose and play

## ECONOMIC CHALLENGES

Recovery is forecast to be slow and bumpy

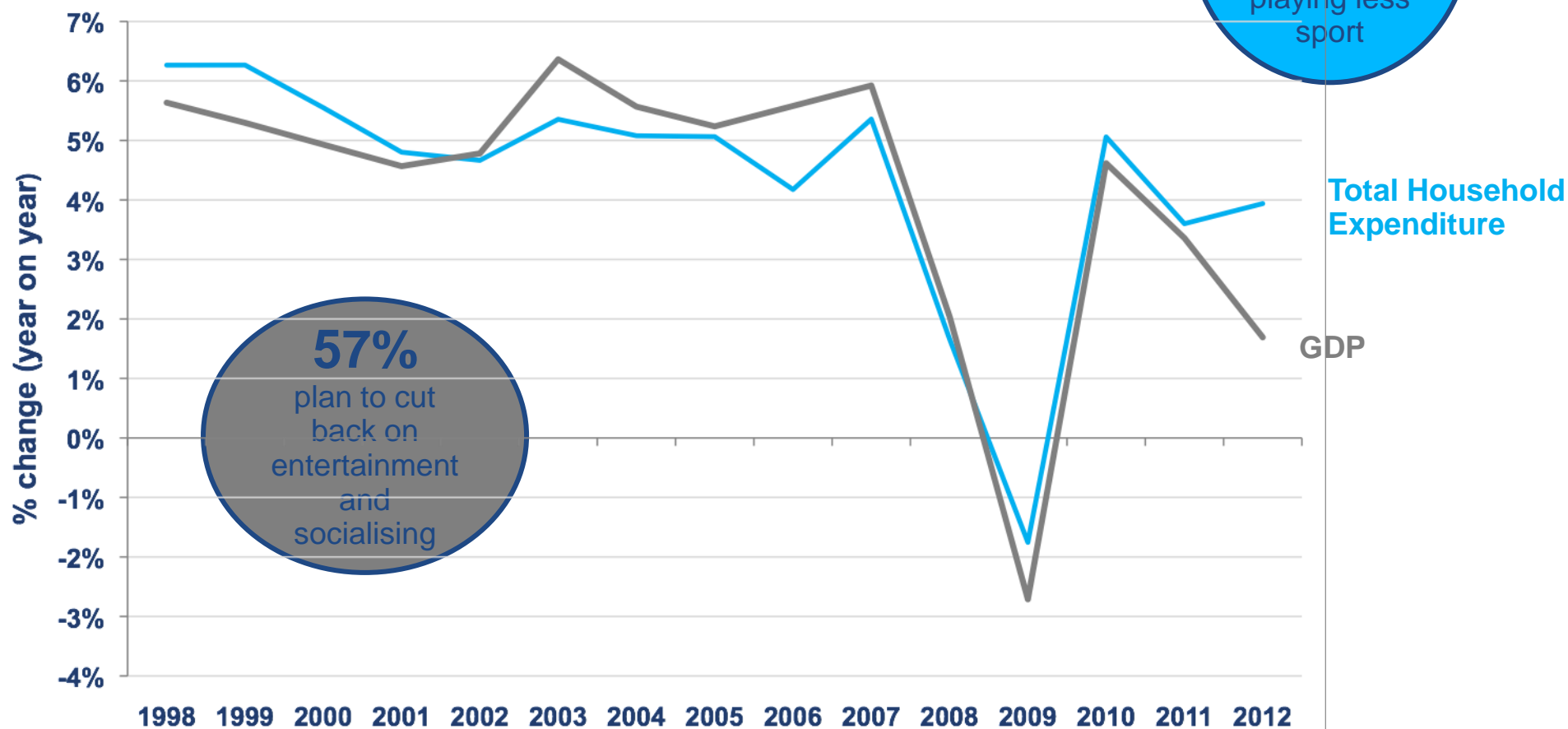
	2012	2013	2014	2015	2016	2017	Movement
Output (GDP growth)	0.0%	0.9%	1.7%	2.1%	2.2%	2.2%	
Inflation (Consumer Price Index)	2.7%	2.6%	2.2%	2.2%	2.2%	2.4%	
Unemployment (Claimants)	1.59 million	1.58 million	1.53 million	1.44 million	1.33 million	1.24 million	
House prices (Movement)	0.0%	0.5%	1.7%	3.0%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

# CONSUMER CHOICES

Consumers are feeling the squeeze...

**25%**

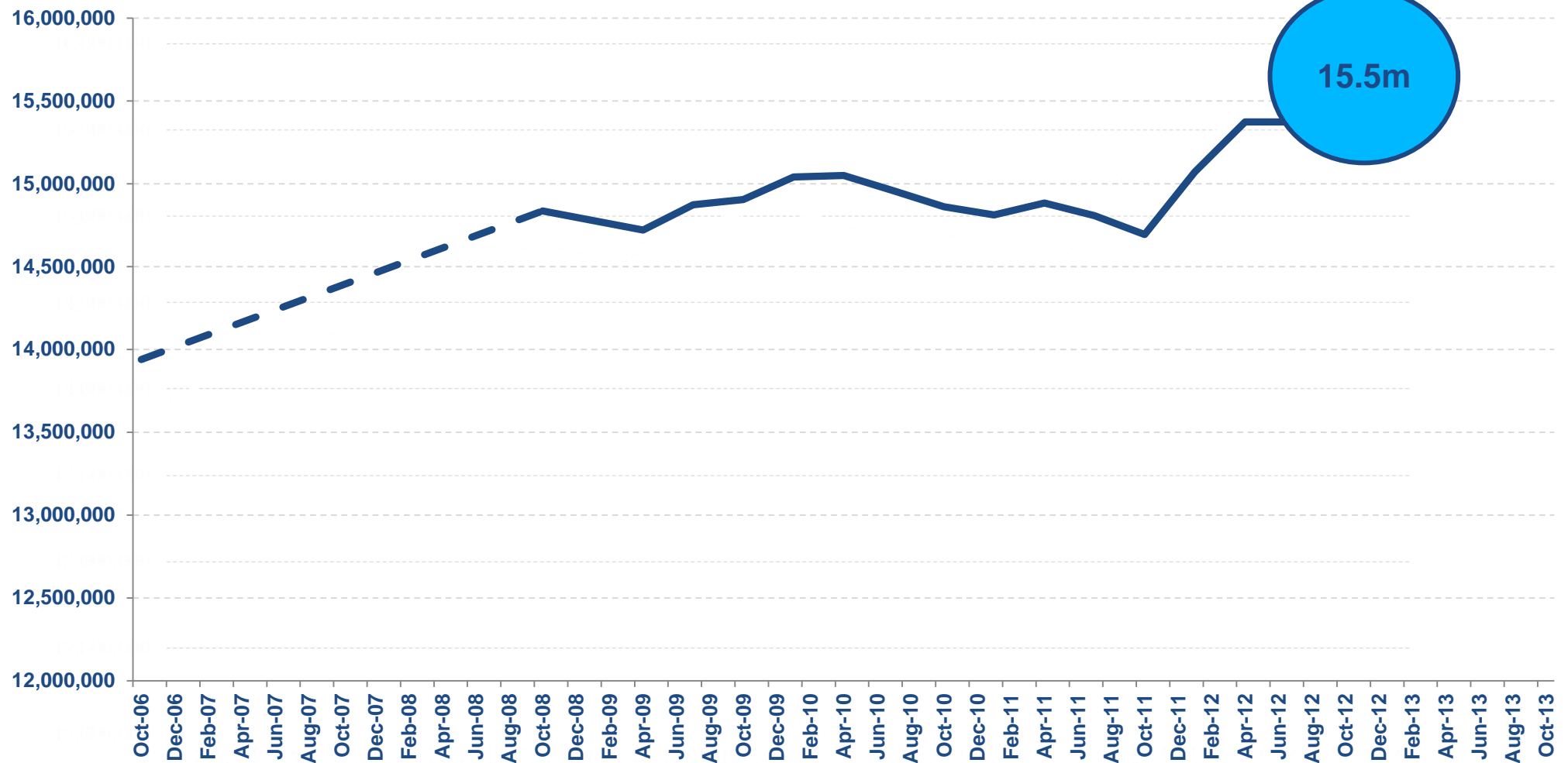
State financial reasons for playing less sport



# SPORTING BEHAVIOUR

Regular participation in sport is moving  
in the right direction

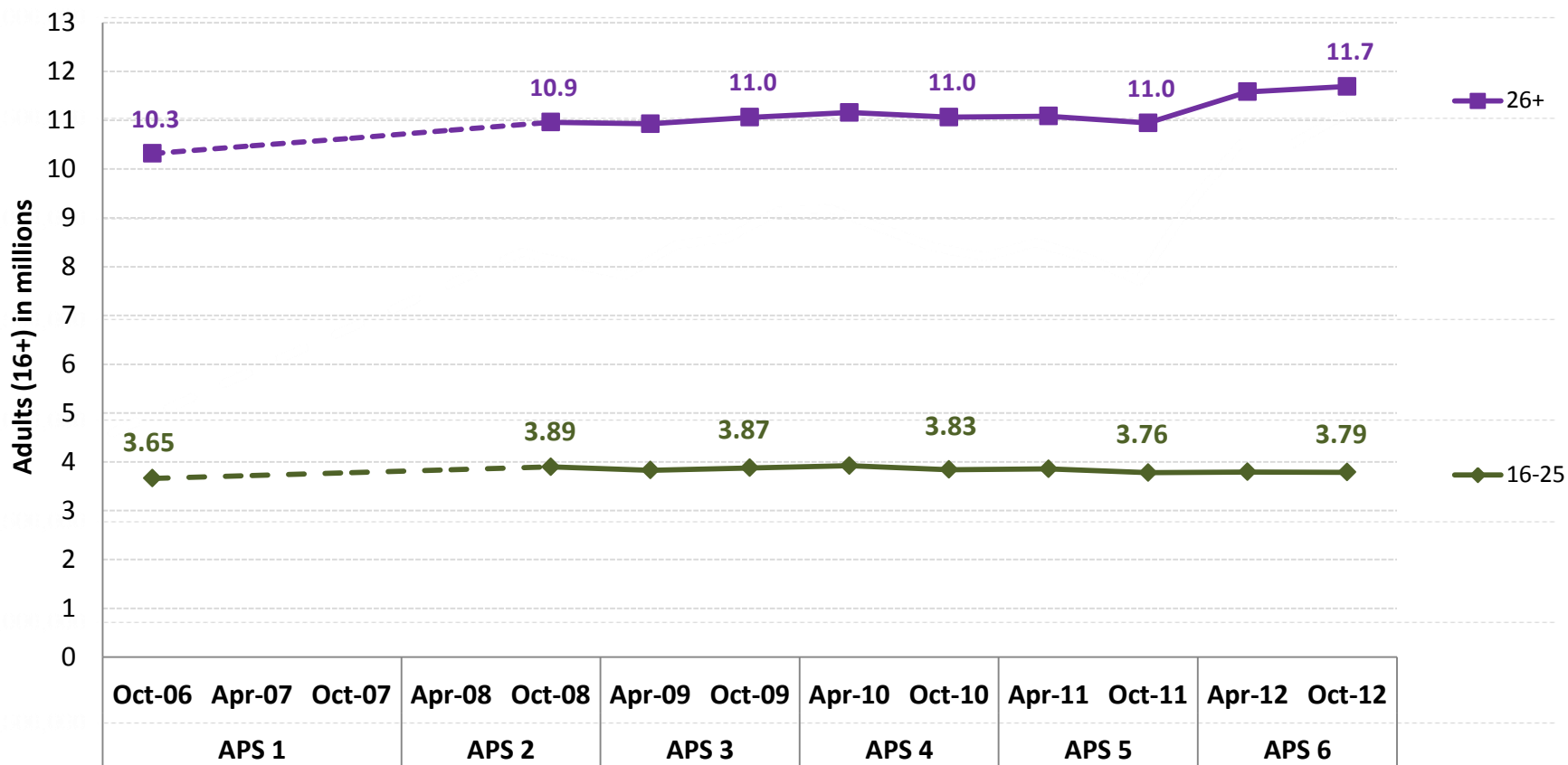
## Regular Participation in Sport



# SPORTING BEHAVIOUR

## Participation Driven by 26+ Age Group

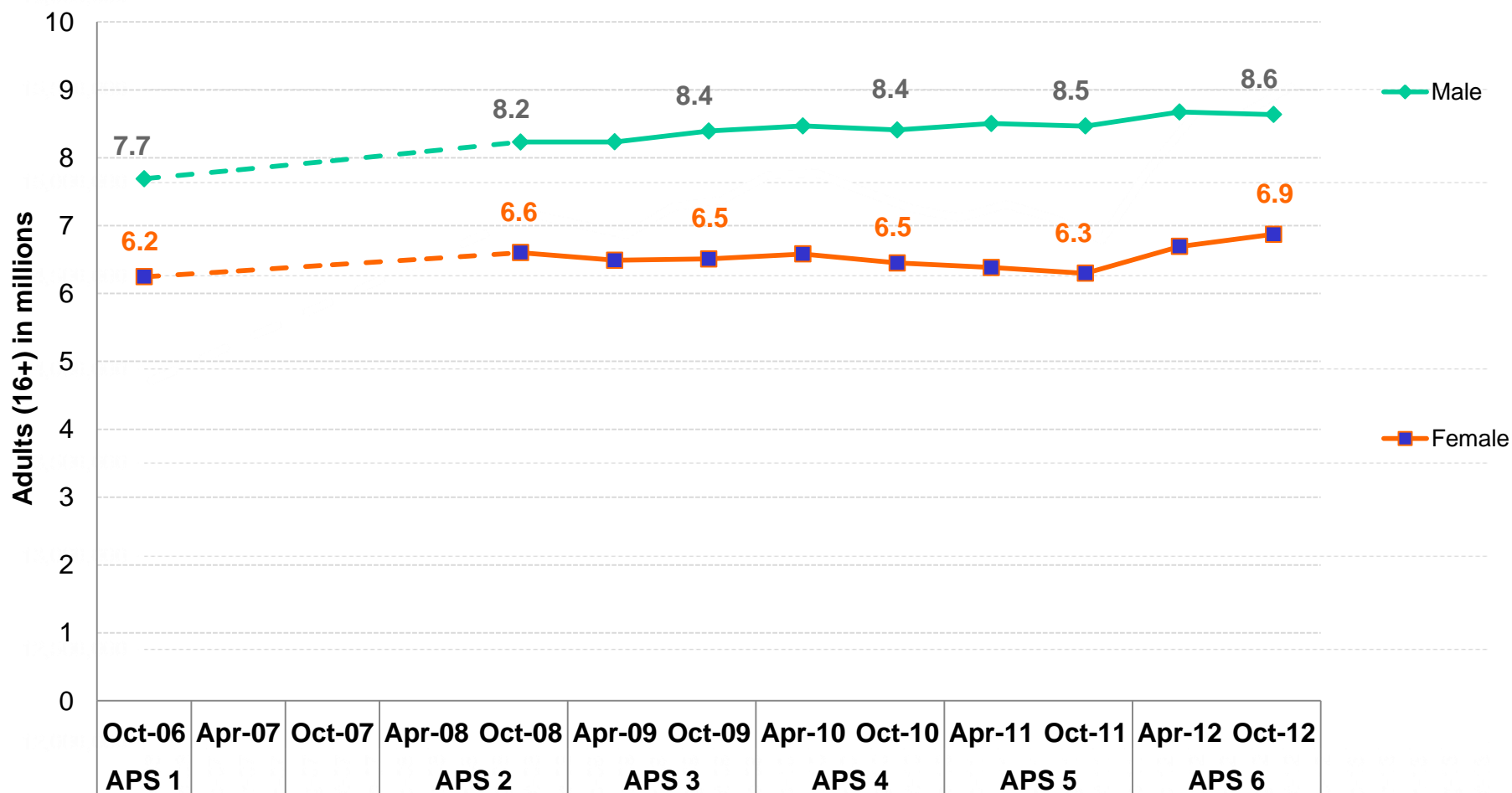
Sport participation by age (millions)



# SPORTING BEHAVIOUR

Female Participation is Increasing but  
Gender Gap Remains

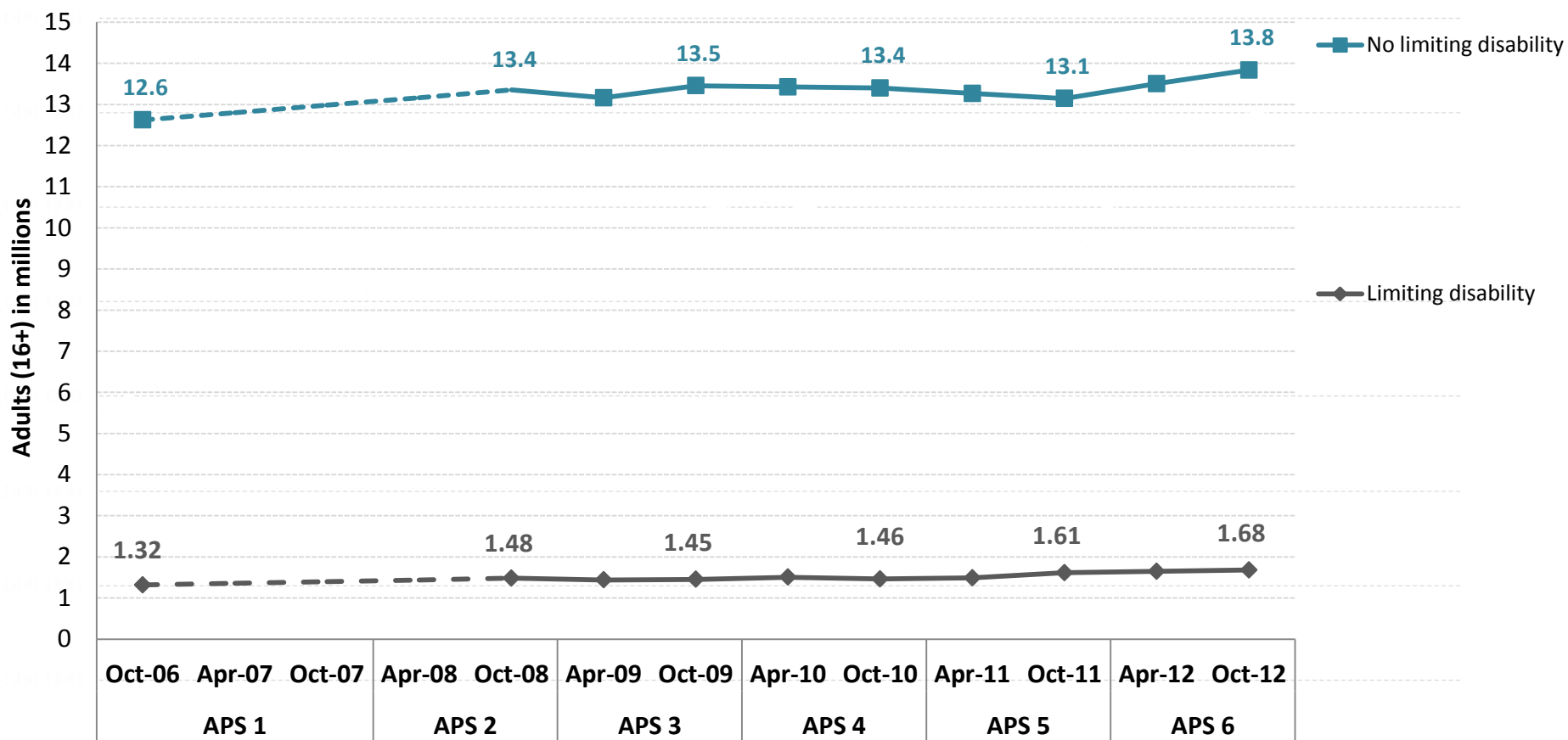
Sport participation by gender (millions)



# SPORTING BEHAVIOUR

More Disabled People Playing Sport but  
Gap is Widening

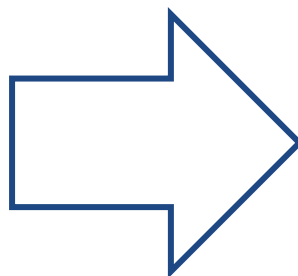
Sport participation: disability (millions)



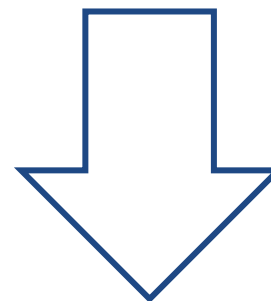


## TURNING EXPERIENCES INTO HABITS

**15.5m**  
playing  
sport  
weekly

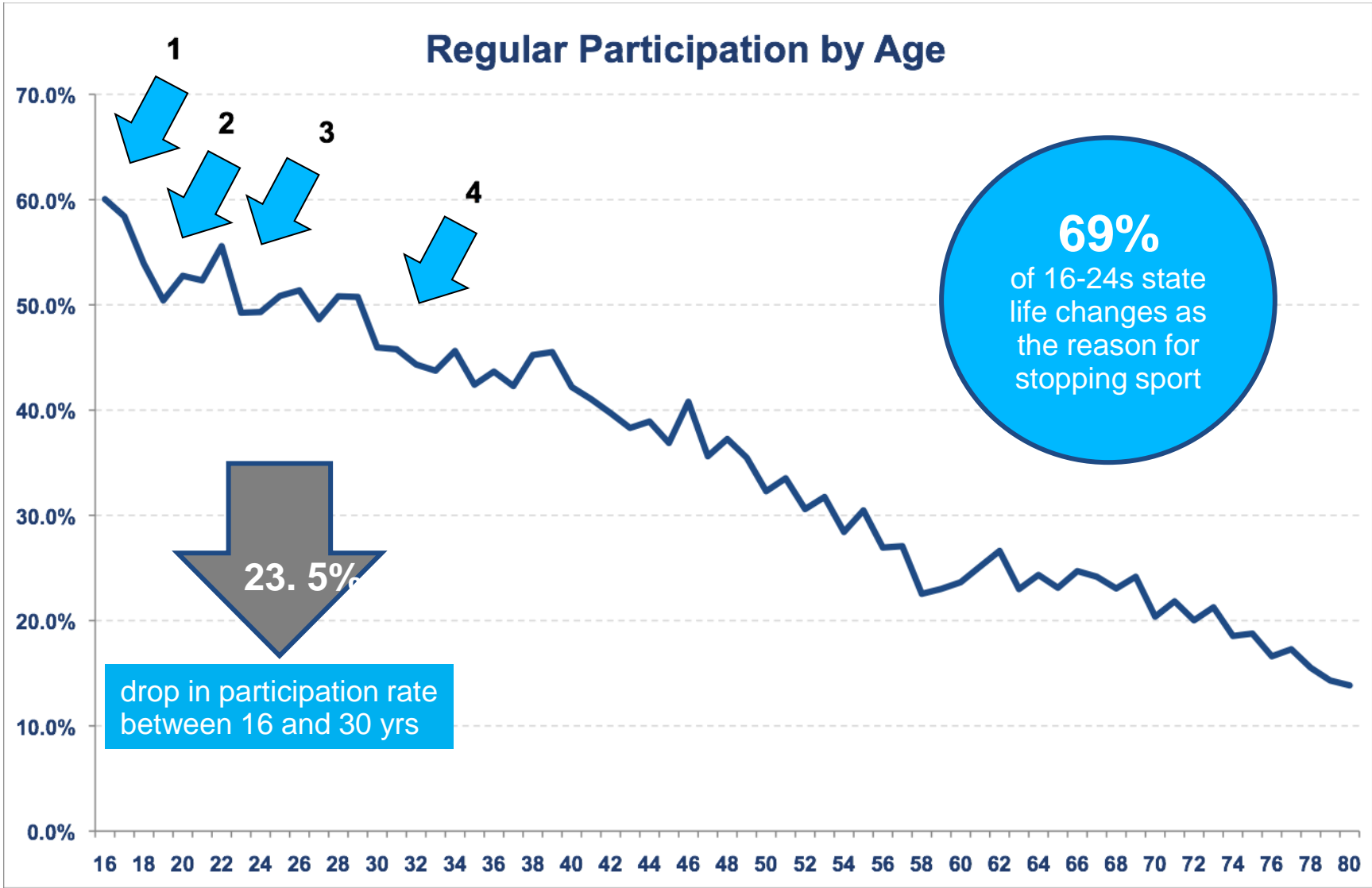


**31m**  
played sport in  
the last year



**... too many are not forming a regular  
sporting habit**

# TAKE ADVANTAGE OF CHANGE



## TAKE ADVANTAGE OF CHANGE



**British Gas**  
Looking after your world

## MAKE IT ACCESSIBLE

BIRMINGHAM  
64 tables  
75,000 visits

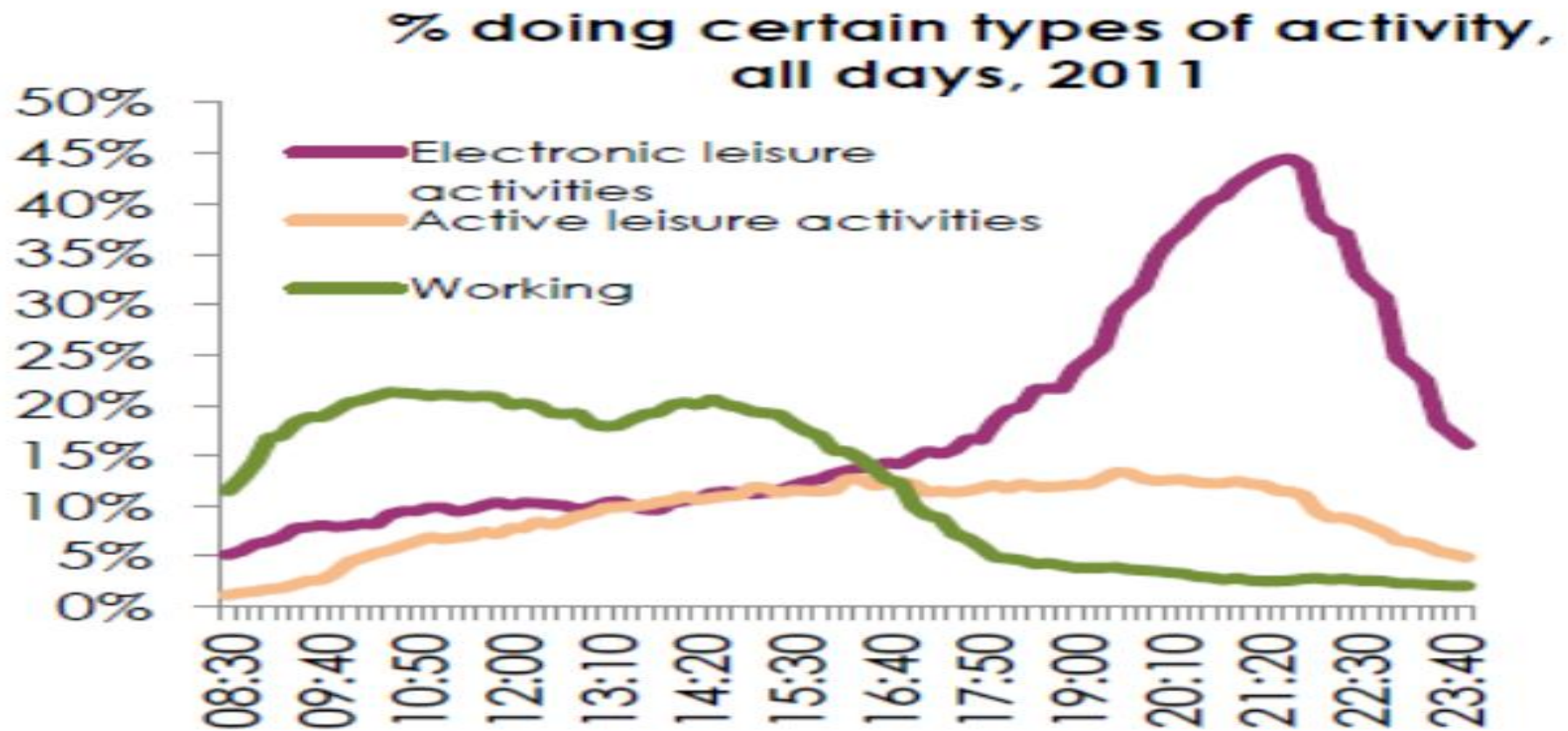
LEICESTER  
58 tables  
58,000 visits

BRISTOL  
40 tables  
55,000 visits

LONDON  
87 tables  
90,400 visits

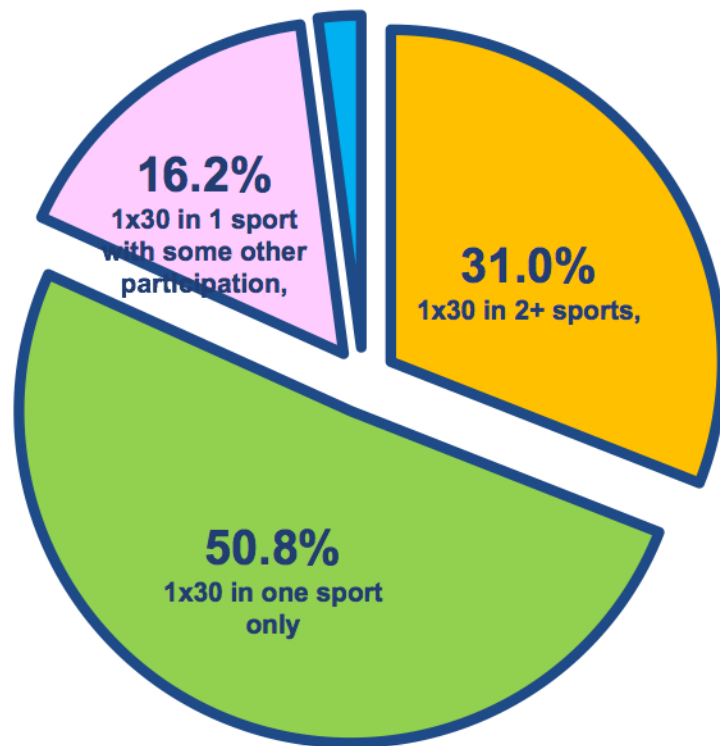


## MAKE IT ACCESSIBLE



Source: Trajectory Time Use Consortium 2011

## OFFER CHOICE



**49.2%** of all people regularly playing sport, play two or more sports. This increases to **60%** of young people

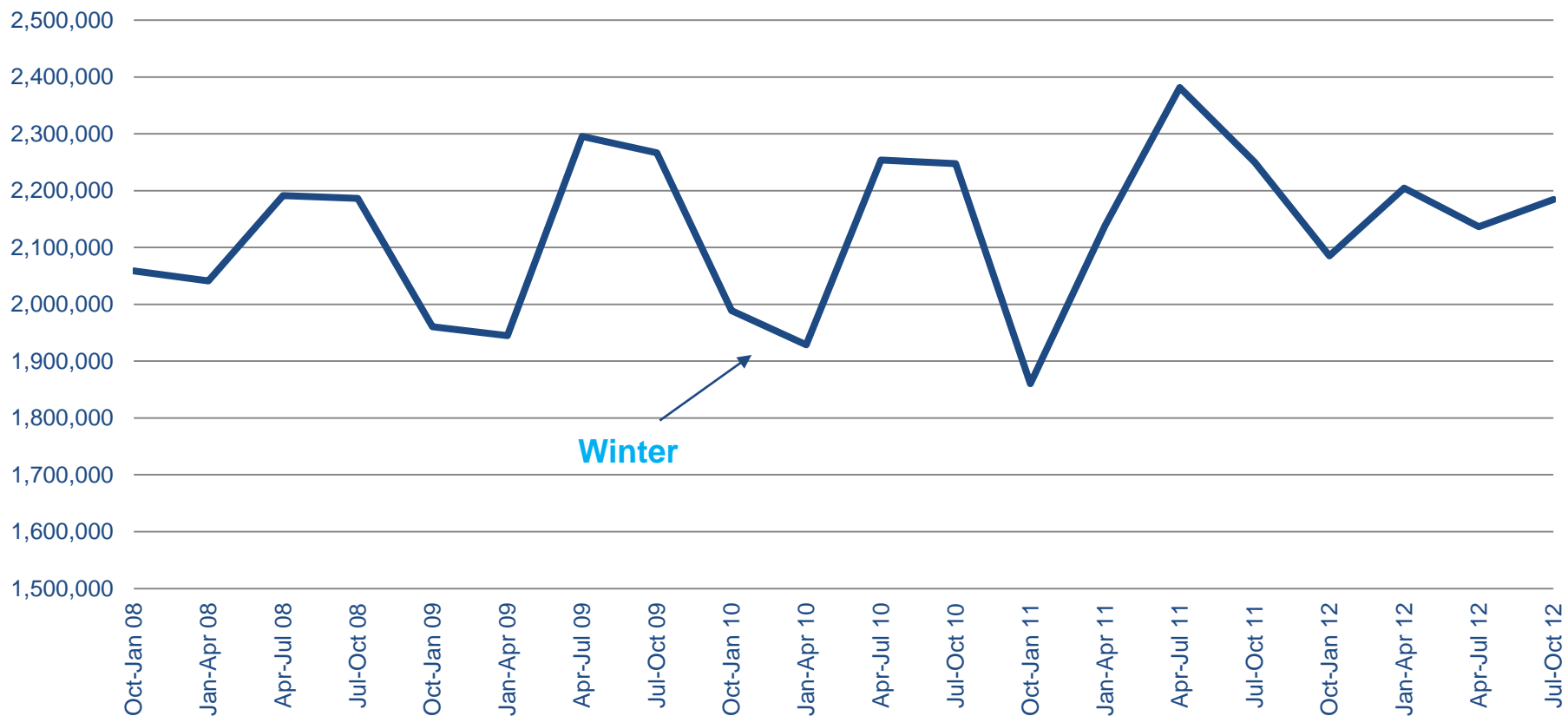
**77%** of 25-34 year olds state they would play another sport if their current choice became unavailable

**47%** of people questioned like surprises & are always looking for new things to do

### The Multi-Sport Habits of Regular Participants

# THINK ABOUT FORMATS

## Football Participation by Season



## REINFORCE HABITS





## **MAKE IT EASY TO CHOOSE SPORT**

- Take advantage of change
- Make it accessible
- Offer choice
- Think about formats
- Reinforce habits

## IN CONCLUSION

- The current economic climate is impacting upon consumer choices & 'more of the same' is unlikely to succeed
- Success will come from helping people who try sport to adopt a regular habit
- Make sure sport is easy to choose and play