

New Players, New Tactics: Views on Sports Policy

A Survey on Reflections from Around the
Sector



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Foreword

The Sports Think Tank is a fully independent organisation dedicated to thorough and insightful thinking around sporting policy in the UK. We aim to push the boundaries of sports policy, to help provide innovative solutions to the challenges facing the sector and assessing the future of sport and public policy in order to widen and deepen sport's influence for social, national and economic good.

To do this, we provide a space for the many different interests in sport to come together, often for the first time, to question, debate and discuss. Whether this is national governing bodies, third sector organisations, sponsors and broadcasters, providers or academics – we want those with a stake in sport to learn from and challenge each other. Only until this happens, will we be able to bridge the gap between the best research, innovations, ideas, and policy-makers.

I am delighted to welcome *New Players, New Tactics*, which assesses the views and attitudes of a wide range of senior executives in sport. It is the first time, that we are aware, that any attempt has been undertaken to reflect and assess the views of the whole sector. Although our efforts are modest, it comes at a crucial time, as we ask ourselves some crucial questions: has there been a sporting legacy from London 2012? Is the long-standing participation strategy fit for purpose? Where should the sporting focus lie for this Conservative Government and the Sports Minister? What are the main challenges for the next ten years and beyond? We are firm believers that sport can play a hugely positive role in society and deliver across various outcomes which are at the forefront of government policy: Health

and wellbeing, community integration, character and resilience, to name a few, all of which are key policy focuses for this government.

If the past few years are anything to go by, sport also plays an important role in inspiring a nation and we hope to carry this forward to this year's Rugby World Cup 2015. We must not underestimate the significant external impact major events have internationally and on our economy.

The sector needs from government a strong, joined up approach for sport and physical activity. For itself the sector must mature, be less insular, and welcome fresh thinking and innovation especially at grassroots and community sport level. Most importantly, as I hope this survey starts to do, we all need to work together to debate, discuss and work together in partnership to achieve this goal.



Andy Reed OBE
Chair

Executive Summary

In November 2014 the Sports Think Tank hosted a roundtable discussion with influential executives from the sports sector to discuss the key issues facing sport for the incumbent government post-election. A survey was subsequently carried out across a diverse range of nearly 100 sports executives to gather opinion on these issues. The insights from this research will provide the Minister for Sport a useful barometer as the Government agrees a new direction for sports policy. The main findings included:

Leadership

- 86% supported a new '10 year cross department sports strategy'
- 95% wanted 'fresh perspectives and more independent input' to achieve goals and 85% believed sport should engage with innovators and entrepreneurs to meet consumer needs.
- Only 10% thought central government provided strong leadership in the sector only 5% thought local government did the same.
- 50% of respondents believed that sports policies in this country were 'not good', with only 30% rating current policy as 'good'.
- 57% of the respondents said the sector does not have a strong intellectual backbone, based on clear evidence and data and to evaluate programmes.
- The strategic allocation of resources and broader funding focus on outcomes were consistently challenged in the survey.
- Nearly 80% said that national governing bodies should think more creatively about products, platforms, pricing and content to satisfy sponsors, broadcasters and customers

Participation & Community Sport

- Only 38% believed Active People Survey is a valid measure of levels of sports participation
- Over 70% said there are not enough community sports facilities in England.
- 55% thought local authorities were not currently providing a good community sport and leisure service.
- Over 90% supported the recognition of sport for development in sports policy.
- 85% thought the sports sector should foster stronger relationships with innovators and entrepreneurs to meet consumer demand.
- Only 11% thought community sport is accessible for all.

Physical Activity

- Just over a quarter of participants (26%) thought that the physical activity agenda has been successfully embedded into sports policy-making
- Respondents called for a cross-departmental approach to addressing physical inactivity.

PE and School Sport

- Opinion was divided on the impact of both the School Sport Premium funding and the School Games programme.
- The sector should allow more time for the current strategy to be fully embedded to allow for hard outcomes to be measured.
- 71% thought fitness testing should be used in schools.

Major Events

- Over 75% said successive governments were right to support a decade of major events from 2010 to 2020.
- 70% would support a further decade of major events from 2020.

Professional Sport

- 60% said the Government should encourage free-market growth of professional sport.
- 85% believed that government intervention in integrity issues was justifiable.

Elite Sport

- Elite sport was identified as one of the UK's biggest sports policy successes over the past 10 years.
- Over half of survey participants (56%) disagreed with UK Sport's 'no compromise' strategy to remove funding from governing bodies when they fail to achieve elite success.

Conclusions

- Elite funding and the decade of sport have been the most successful policies of the last ten years.
- Community sport and increasing participation policies have been much less successful, as has access for all.
- The current school sport policy remains in the balance – this needs more time.
- Balancing the growth of professional sport whilst ensuring they have integrity remains a significant challenge, however, there is support for the Government to intervene more.
- The sector would welcome further investment from wealthier sports into grassroots and community sport to reinforce the traditional pyramid of sport.

Priorities

- A new, refreshing strategy for sport especially for grassroots, community, leisure and recreational sport – this should focus on sport delivering wider outcomes and ensuring access for all people in society.
- PE and school sport policy should be at the top Government's agenda for developing the successful foundations of a participation pipeline.
- Local authority provision needs major reform
- Elite funding should continue.
- A further decade of sport should be developed.

New Approaches

- Need for strong leadership at both central and local government – strong 10 year objectives for sport are crucial, as is a joined-up approach by government.
- Both the government and the sector need to facilitate more innovation and entrepreneurship, and a focus on consumer demand within grassroots, community, leisure and recreational sport – a new mechanism to ensure this is continuously refreshed is crucial.
- There needs to be an on-going public debate about the role of sports policy and funding in national life.
- New independent space is needed to debate and bring in new thinking from innovators, entrepreneurs, academic research, those from outside the sector as well as views from all parts of the sport sector to ensure the sports sector matures.
- The sector, especially the grassroots, community, leisure and recreational sport need to embrace technology to help collect accurate data to create a better evidence-base.
- Sector needs to work together better to ensure it creates a strong intellectual backbone.

Introduction

This report assesses the sector's views on sports policy. We wanted to examine the views of the sector's leaders in terms of what policies they thought had been successful and less so, over the last ten years; what they saw as the risks and challenges for the future and what any new Government should prioritise in the first 100 days – now overtaken by the publication of the Government's *A New Strategy for Sport* consultation. We also wanted to provide respondents with an opportunity to submit their own policy ideas and suggestions. For this purpose we designed the four open questions at the end of the survey.

We believe this is the first attempt to gather the views of the sector in one place. Despite the survey limitations, which there are many, this provides the sector and policy-makers with a broad base understanding of where they should focus their attention. It is also, we hope, the beginning of a journey where the sports sector can begin to work together, debate the issues, challenge current thinking and bring in outside ideas and influences in which it can build its voice, a voice that is robust, evidence-based and innovative to help develop sports policy in the years ahead, even after the new sport strategy is published later this year.

The Roundtable Discussion

In the lead up to the General Election the Sports Think Tank hosted a roundtable of stakeholders in sport in November 2014 to assess and debate what the sector's priorities were ahead of the main political parties releasing their manifestos. We asked questions such as: What has sport policy achieved in the last ten years? What should the sports policy priorities be at the next election and what can be achieved? And do we need a ten year, cross-departmental strategy for sports policy?

What emerged from this discussion was an interesting and expansive debate, which drew in ideas and perspectives from a group with diverse sector representation, including national governing bodies, the commercial sector and third sector sport executives as well as prominent academics within sport.

The discussion invariably turned to on-going criticism of the sports landscape being too crowded and complicated, noting that there are an overwhelming number of agencies, bodies and organisations currently competing for recognition. This of course is not helped by the Government's leadership of sports and physical activity policy which is scattered across numerous departments including Culture, Media and Sport, Health and Education.

Despite the collaboration of these and other Whitehall departments to successfully to deliver the 2012 London Olympic and Paralympic Games, there appears to be limited cooperation between these departments to effectively deliver an ongoing legacy for sporting and physical activity participation policy. One of the key ideas that emerged from the roundtable was that there was also an entrenched lack of unity in the sector itself. This lack of unity was responsible for the absence of a clear voice on policy that was loud enough to be heard and taken seriously in Whitehall and this was affecting the sector's ability to significantly influence politicians and decision-makers.

Methodology

Using themes and questions from the roundtable, we developed a sector questionnaire covering the main points of the discussion. The questionnaire underwent rigorous re-drafting, which saw the original 50 questions condensed to 32. These were used in a pilot study with 10 leaders from the across the sector, who evaluated and fed back on the research process. Changes to the final questionnaire were made accordingly. The final survey consisted of 36 statements,

with participants asked each time to what extent they agree with the relevant statement, and a series of four open questions which allowed fuller answers.

A sample of 220 executives from the sports sector were invited by email to take part in an anonymous survey of 41 questions via a popular web-based survey programme. 92 people responded to the email invitation by completing the survey, a response-rate of 42%. Figure 1 shows the breakdown, by sector, of respondents.

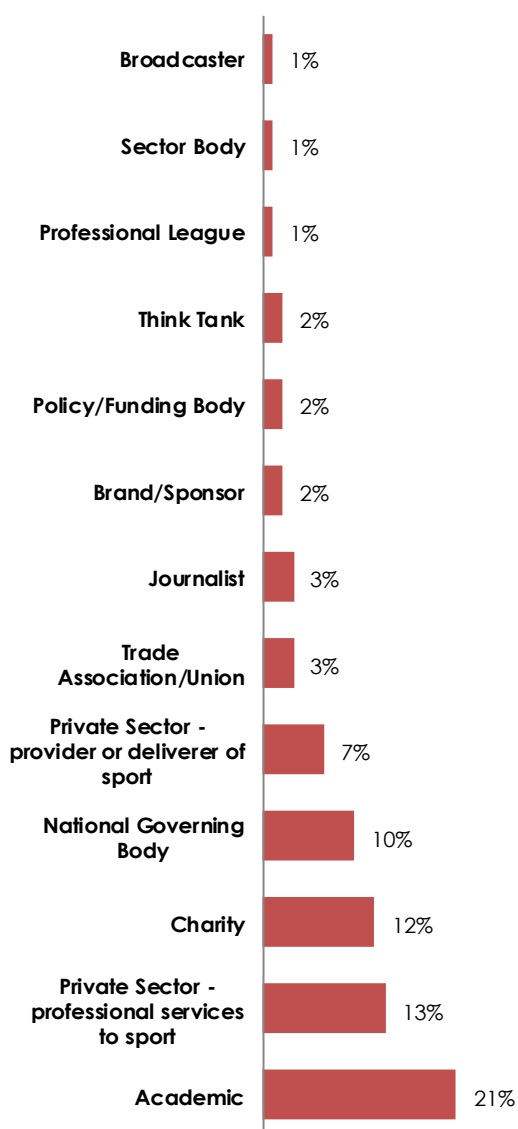


Figure 1 – Breakdown of Respondents by Sector

Statistical findings from the first section and qualitative analysis from the open

questions were used to identify key research themes for this report by the Sports Think Tank team, with the support of an independent verifier and also using the agreement responses from the 36 survey statements, identified the key messages and recommendations from the study. The themes, messages and recommendations were agreed by an independent verifier to whom was given full access to the survey results.

Limitations

It is not claimed by the authors that this sample is completely representative of the entire sports sector. The sample is notably imbalanced in terms of both gender and ethnicity, weaknesses attributed to inherent flaws in the convenience sample (invitees to the sample were drawn from a private contacts database), but the sample also reflects biases and a lack of diversity in the sector itself. For future studies of this nature, as well as a greater balance of gender and ethnicity, the sample could be improved with contributions from athletes, teachers, coaches, clubs, brands & sponsors, supporters/fans and the media.

All possible efforts were made to ensure that the wording of every question was clear, unambiguous and did not unduly influence the responses. The questions were intended to cover an expansive range of key topics relevant to all parts of the sector. These questions and the issues they cover arose from the roundtable discussion, where major issues for sports policy in the run-up to the 2015 general election were discussed and agreed.

Furthermore, the survey made clear that questions focused on where the responsibility for sport policy lay with the UK Central Government – sports policy-making in England and UK elite sport. As such, this survey does not reflect the views of devolved policy decisions made in Scotland, Wales and Northern Ireland, even though some respondents worked across UK sports policy. This was a limitation of the survey.

Leadership

To better understand how the participants felt about the strategic direction of sport, the survey contained questions broadly referring to leadership of the sector. This focused on English policy-making institutions including: the Department for Culture, Media and Sport (DCMS); local authorities; the non-departmental bodies implementing the Government's sports strategy – primarily Sport England and UK Sport.

Role of Central Government

The Labour Government's 2002 sport strategy, *Game Plan* was a landmark document that provided a rationale and action plan for mass participation and performance success in sport. Uniquely, it encouraged joined-up thinking across Whitehall, in particular to use sport to help address health and community issues at a local level, especially social exclusion, a central new Labour Government policy. In her foreword to the document, the then Secretary of State, Tessa Jowell noted:

*"Too often, too many organisations fail to join up their policies and their programmes. Too often, evidence on how to be most effective is lacking. Too often, initiatives lack sustainability. This means that children and young people miss out on the opportunity to enjoy sport, and we as a nation fail to identify future champions."*¹

Game Plan suggested that the 'many different strategies lead to confusion; and complex structures to inefficiency; ensuring the sector was poorly coordinated, lacked efficiency and often duplicated of roles and services.'²

Playing to Win: A New Era for Sport was published by the then Labour Secretary of State, Andy Burnham MP in 2008. *Playing to Win* set out its answers to the complex questions that sports development in England faced in the run up to the 2012

Olympic and Paralympic Games. In his introduction, Andy Burnham stated:

*"Sport is ultimately about people... We want to liberate sport's experts and elite performers to inspire more people to get off the couch and back in to sport, to sustain their enthusiasm and provide a quality experience which will allow individuals to excel".*³

This strategy announced a new partnership between Sport England and National Governing Bodies of sport (NGBs), and sought to increase participation and provide more quality coaching for more people and to build a club structure that was accessible to all. It was built around the belief that 'sport is often at the heart of a community, helping local communities live and thrive'⁴.

In January 2012, the new Conservative Secretary of State, Jeremy Hunt, published his youth sports strategy, *Creating a Sporting Habit for Life*. In his introduction he stated that:

*"As recent figures show, the challenge is not simply to build sports facilities but to fill them; and not simply to provide a short-term burst of interest and excitement, but offer long-term pathways that help young people continue playing sport into adulthood."*⁵

This strategy provide a new approach to grassroots sport – a more rigorous, targeted and results-orientated approach which focused on reaching out to young people more effectively by providing sporting opportunities in their local community. This vision was established to embrace and capitalise on the 2012 London Olympic and Paralympic Games, as well as other world-class events.

In the wake of the latest disappointing participation figures in England, Tracey Crouch, the Conservative Government's new Sports Minister, has made clear that these documents are out-dated and a further fresh approach is required to sports policy. At the beginning of August 2015, she set out her intentions by launching a public consultation on a new broad strategy, 13 years on from *Game Plan*. This

represents a major opportunity for the sector: to take stock and provide the Government with a strong set of evidence-based ideas and innovations to take sport policy into and through what is likely to be a fast-paced environment over the next decade and beyond.

The majority of respondents to our survey believed that DCMS, UK Sport and Sport England should remain primary organisations setting sport policy and funding priorities in the future. While only 10% thought Central Government provided strong leadership in the sector, and 20% thought it neither did this well or poorly, 69% felt Central Government was not providing the leadership the sector needed (Figure 2).

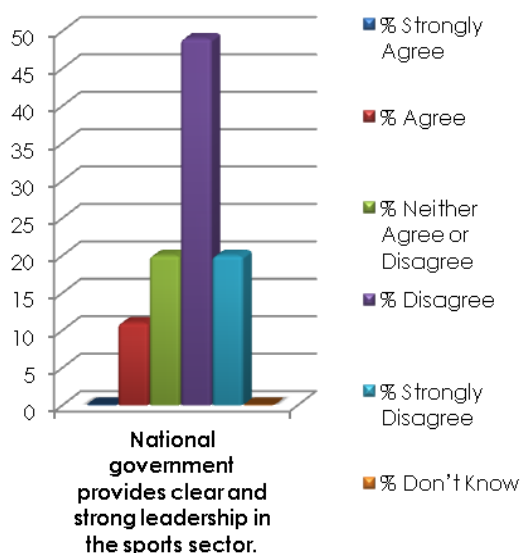


Figure 2 – Central Government Leadership

When evaluating the Government's leading role in policy development however, the picture painted was particularly mixed. Only 5% of participants believed that the Government does not need a 10-year cross-departmental strategy for sports policy, whereas 86% believed that it was necessary (Figure 3).

Of further concern was that 50% of respondents believed that sports policies in this country were 'not good', with only 30% rating current policy as 'good'. Much has changed since *Game Plan* was conceived, especially how society

prioritises its leisure time, uses technology and the 2008 strategy to deliver increased participation through the NGBs.

The research clearly indicated that respondents thought sport should be more unified, perhaps in one organisation that was responsible for sport policy from 0-18, and 18 and over, providing a more seamless journey that reflected people's real life experience of sporting activity over a lifetime.

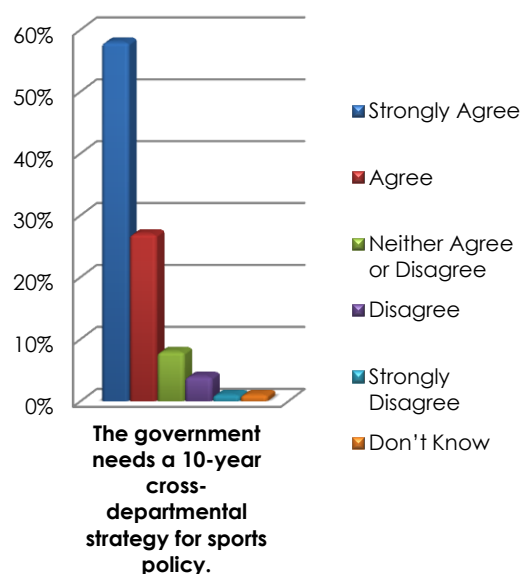


Figure 3 – Cross Departmental Sports Strategy

The changing relationship between sport and society is perhaps supported by the fact that over 95% wanted 'fresh perspectives and more independent input' to achieve its goals. Another 85% also believed that sport should foster strong relationships with innovators and entrepreneurs to meet consumer needs. Some of the ideas suggested to ensure the sector is better coordinated and has a stronger political voice included:

- Merge various sporting organisations to provide an effective platform for the identification of and exchange of good practice, a single unified voice and mutually agreeable leadership
- Encourage national governing bodies to modernise and adhere to 21st century governance structures

- Encourage all stakeholders to work together and share knowledge and experience through providing an appropriate platform for ideas to evolve
- Better use and resourcing of the Sports Think Tank
- Establish one organisation which is responsible for managing the role of sport, physical activity and recreation across the Government agenda
- Work with the commercial sector as a delivery agent to support reforms and innovative ideas

Role of Local Authorities

Local authorities are responsible for the provision of community sport, including recreational facilities such as leisure centres and parks. After the passing of the reforms outlined in the 2012 Health and Social Care Act⁶, local authorities are also responsible for overseeing health outcomes. Despite their duties to promote healthy lifestyles there is no legal requirement for local authorities to provide facilities for sport, physical activity and recreation.

Even more respondents thought Local Government provided less leadership than Central Government with 68% thinking that local Government did not provide clear and strong leadership, 25% of respondents were indifferent to whether local authority provided strong leadership or not. Moreover, one respondent suggested that, 'local authority sports development has been devalued in status due to availability' and now, 'serves little function or purpose at the grassroots level'. One identified reason for this is that Local Government's yearly cycle deters investment at the local level, as those returns, such as on physical activity, are not measurably achieved until sometime after.

Furthermore the on-going cuts in local authority budgets are starting to have significant impact on local authority provision, which was identified by many respondents.

Evidence-based policy and better use of data and technology

The Labour Government established the Cultural and Sport Evidence (CASE)⁷ strategic research programme. The CASE programme is jointly funded by the Department for Culture, Media and Sport, Arts Council England, English Heritage and Sport England. It builds on the Taking Part⁸ survey, which collects data on many aspects of leisure, culture and sport in England, as well as an in-depth range of socio-demographic information on respondents. There are currently over 12,000 studies on engagement in culture and sport, in an online, searchable database⁹.

The programme released two reports in March 2015 which examined the wider impact sport can have in supporting other policy areas: *Further analysis to value the health and educational benefits of sport and culture*¹⁰ and also *A Review of the Social Impacts of Culture and Sport*¹¹. The programme has also released various other reports since it was established, assessing the value of sports policy.

Whilst it is generally accepted that while the case for sport in policy-making is growing stronger, 57% of the respondents to the survey said that, generally, the sports sector does not have a strong intellectual backbone, based on clear evidence and data, to evaluate programmes and deliver best practice. Elaborating on the issue, one respondent noted there has been a "lack of an evidence base used in the distribution of investment... and lack of investment in the development of an evidence base (i.e. research and evaluation)." While many sports organisations, Government and academics have produced a wide range of research and reports, these need collecting, analysing and presenting cohesively.

This view was supported by respondents when assessing future policy-making, with participants suggesting that decision makers both at the local level and in Central Government can utilise research within the sector to make better-informed, demand-led decisions that focus on sport's wider outcomes. To this end, respondents thought community sport remained data-poor and used little of the technology available to it. One respondent stated that, in their understanding, not one NGB uses an application-programming interface (API), which is crucial in accessing software developers' products such as consumer-driven apps. Respondents felt that traditional grassroots and community sport and leisure providers needed to make significant progress here, especially as technology entrepreneurs and innovators are embracing changing consumer behaviours and expectations, which ultimately alters the face of sport activity and seeing good success.

To this end, some respondents also thought that the sporting infrastructure needed to ensure that it was able to work with these disruptors, embrace innovation and ensure that sports policy not only caught up with the changes in society and technology but stayed up-to-date with the myriad of rapid changes that will occur in the next ten years. We believe a mechanism, such as an 'innovation unit', could be established to not only embrace new technology and innovation, but support it and potentially fund new solutions, all with a light touch.

The following ideas were also proposed that advocate better use of data and technology by the sector to achieve some of these wider policy outcomes:

- Develop more multi-media, collective, co-ordinated marketing campaigns for sport and physical activity that advocate innovating lifestyle sports and traditional sports into a 'way of life'
- Develop and publish open data for the sport and physical activity sector, using the API format, to stimulate creativity in the sector, similarly to how

Transport for London have done with launching a Technology Innovation portal that collects new ideas and solutions from third parties

- Research and produce good quality, robust insight and data into sport participation
- Embrace, support and fund innovators from different sectors into all aspects of sport
- Encourage better use of social media platforms to engage communities in sport and physical activity.

Funding

The Central Government department responsible for the majority of sports policy, DCMS, invests around £500 million each year in sport in the UK, through UK Sport and Sport England, around £150 million and £350 million per annum respectively.¹² With the Olympic and Paralympic Games taking place in London in 2012, government investment levels were inflated for one year. The Department for Education is responsible for investment in physical education and school sport. Community sport falls under the responsibility of the local authorities.

In the five years since 2009-10 the Local Government Association has calculated that the local authority budget for sport and leisure has been reduced from £1.4bn to around £1bn, with further cuts recently announced in the budget from the new Conservative Government.¹³

When asked, 62% of participants suggested that public funding in sport should increase, compared to 34% who believed it should stay level and 4% who thought funding should decrease as a proportion of government spending (Figure 4).

Should government investment in sport stay level?

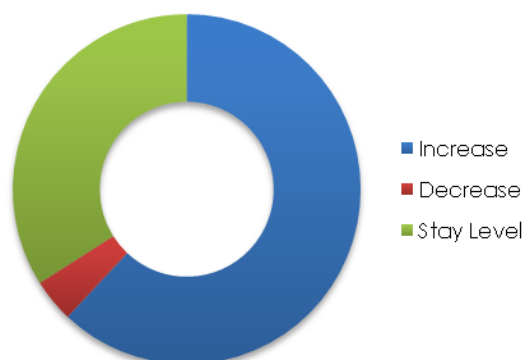


Figure 4 – Government Funding for Sport

Although many appreciated the level of funding into sport in general has been consistent over the past 10 years across successive parliaments and has been well received, the strategic allocation of resources and broader focus on outcomes was consistently challenged in the survey. Much of this debate can be broadly attributed to the focus on delivering the 2012 Olympic and Paralympic Games, in particular the conflicting focus between elite and grassroots success. One participant remarked that leadership and policy from Central Government has been concerned with changing structures to support sport rather than a “broader philosophical approach” because “it is easier to tinker with people and organisations”.

Some respondents also thought that the level of investment in the Olympic and Paralympic Games indicated that decision-makers based in Central Government had successfully helped to raise the profile of sport over the past ten years.

While many responses called for more general funding of community sport, a number identified a wider imbalance in funding strategy and called for more existing funds to be re-directed from elite sport and also commercial revenues from top professional sport to grassroots and community sport initiatives. In fact, 65% of respondents thought Government should

use levies on certain richer, more commercial parts of the sector to fund other parts and 72% thought the private sector should invest more into community sport. This is juxtaposed with the belief that national governing bodies should think more creatively about products, platforms, pricing and content to satisfy sponsors, broadcasters and customers. In doing so, as we have heard on previous occasions, this could increase the revenues into the sector.

These points reflect a real challenge for policy-makers and the sector as they look to stimulate and support a new sports strategy amidst the on-going spending cuts that are likely in the forthcoming Spending Review in the autumn of 2015. The Government’s recent consultation is a good place to start, with 71% of participants reflected a need for a debate about why the Government invests public funds in sport. Respondents also suggested that funding and related issues should be a policy priority for leaders in the sector, particularly given the inevitable cuts that will impact sport at the local level and the ongoing criticism that after significant investment participation, whilst not decreasing, has not soared as policy-makers had anticipated. Sport England have already instigated a ‘mixed-economy’ funding structure that rewards national governing bodies who deliver but supports third sector organisations who have proven they can deliver increased participation. Many respondents felt the mixed-economy was the right way forward, both now and after the current Sport England Whole Sport Plan Settlement, which expires in 2017.

The Role of the Sector and Co-ordination

Over three quarters of participants (78%) did not believe that the sports sector had an effective, strong and unified voice able to influence change at the policy level. Some respondents highlighted the need for a think tank and/or a sports disruption unit, to support the sector and policy-

makers with independent thinking and insight, and provide the environment to introduce new ideas and best practise from other sectors. Furthermore, respondents also noted that the future success of the sports sector is at risk from a current lack of unity and co-operation at all levels, from Central and Local Government, and between organisations within the sport. In particular, sport's relationship with the health sector and the recognition of shared outcomes were frequently identified as areas where the sector has not been successful over the past ten years. This in turn has perhaps confused and distorted communications at the policy level, impacting on policy-makers willingness and ability to effectively deliver clear messages.

domestically. Respondents included governance at home and abroad among their risks and challenges for the future of the sport sector, including the integrity of international governing bodies, oversight among the wealthier sports bodies and policing to force out anti-corruption issues.

Expertise and Governance

A lack of expertise in some of the most prominent roles and consistently poor governance were identified as risks and challenges for the future. Respondents believed these needed to be addressed with the support of Government. Comments bemoaned a lack of knowledge and diversity in the sport sector, including some specific risks including "that we continue to believe that NGBs have the skills, roles or motivation to deliver physical activity" and less specific responses: "quality personnel find jobs elsewhere".

Respondents cited fears over the future of volunteering: "Community sport volunteers are alienated by a requirement to deliver Government agendas which are not their role" and also highlighted the "lack of diversity in senior leadership positions". This echoes the methodology section of this report with respect to how diversity in the sector may have influenced the makeup of the sample involved in this survey.

Similarly the consensus was that poor governance affects the sector widely. Some respondents urged action on this issue as a matter of government priority after many years of perceived failure to do so both internationally and

Participation & Community Sport

The Active People Survey

Since 2005, the number of people playing sport has been tracked continuously through the Active People Survey. Results are released in June and December each year, including a full year's data. This data is broken down by demographics such as age, gender, ethnicity, as well as by the way people are engaging, such as participation by volunteering or club membership. Sport England launched a consultation into different data capture methods in September 2015.

Opinions elicited on the Active People Survey (APS) were broadly negative: only 26% of respondents thought APS is a valid measure of sport participation. Answers to the open questions mirrored this finding. Some comments identified measurement as being among the risks and challenges to a successful and flourishing sports sector, citing "insufficient measurements in place to track health statistics" and "a lack of specific physical activity targets". While the survey found some people in the sport sector thought the APS is a useful umbrella indicator of national participation in sport, especially as it is the only longitudinal tool we have for measuring participation over time. It was also thought that the APS is a poor key performance indicator for individual sports, pitting one sport against another when participants often play many different sports at the same time or over a lifetime.

A few respondents suggested a new way of successfully measuring public participation was through measuring 'activity'. To this end, some participants felt that by better defining sport participation was a crucial first step: sport

operates across and at a number of interchangeable levels including: elite, professional; grassroots; community; leisure; fitness and recreational. Defining sport in this way and measuring activity, would also pull the sector together rather than pushing it apart through competition for 'participants'. This also would better reflect a person's modern sports journey, dipping in and out of many different 'sporting' activities over a lifetime. Some respondents also felt that technology had an important role to play and could be deployed to track activity providing a much stronger, resilient and reliable form of measurement.

Furthermore, it was suggested that the Government might wish to separate recreation and performance delivery in order to free national governing bodies of the responsibility of increased participation targets.

Participation & Accessibility

Community sport was frequently cited among the risks and challenges to the future of the sector and as a policy priority for the new Government, both directly and in relation to wider funding issues. Furthermore, there was a clear view that the distinctive roles that sport and physical activity can play in the wider policy context in delivering outcomes that improve community integration, boost employability, reduce crime and build character and resilience. 92% felt this 'sport for development' should be recognised. Many respondents commented that this must be embedded into a sport strategy as a central pillar. There was also general support for Sport England's current mixed economy approach to funding community sport, but it was suggested funding in these areas should go to organisations that deliver results in areas of priority.

While the evidence is clear that participation has decreased since the Olympics in 2012, the level of participation policy-makers had anticipated has not been achieved over the ten years. In 2006

the number of people 16 and over playing sport once a week was 14.1 million, during the year up to March 2015 the number was 15.5 million, an increase of 1.4 million people¹⁴.

Respondents felt that new thinking was needed here, many citing that the sector needed to, 'adapt its offer and create new models based on traditional sports but dovetailed with modern life and technology'. There was a pressing need for sport to be consumer-focused and demand-led: as we have seen, respondents felt the sports sector should foster stronger relationships with innovators and entrepreneurs to meet consumer demands. Furthermore while innovation was already happening outside the traditional areas, these 'new' sports should be embraced in a new light-touch way that allows them to flourish, that also provides encouragement, support and potential funding to stimulate new ideas. Examples of this include new formats of existing sports, such as Rugby 7s and FootGolf.

It was widely acknowledged that low socio-economic status remains a major barrier to access to spectator and participation opportunities. Many comments identified a "haves versus have-nots" culture of inequality, which is embedded throughout the UK, with nearly three-quarters of respondents (74%) stating they did not think community sport is currently accessible to all groups, especially women and girls, ethnic minorities, disadvantaged and the disabled (Figure 5).

Providing better access for all was seen as a significant failure of sports policy over the last ten years and a priority for the future, particularly for women, which was strongly highlighted. In our qualitative research, we heard that respondents felt sport has remained a middle-class pastime and that efforts to increase participation in sport have largely only succeeded in allowing already sporty people to become more active. It was often felt that this was supported by the funding of NGBs, which often attracts more affluent

participants and decreases access for under-represented groups.

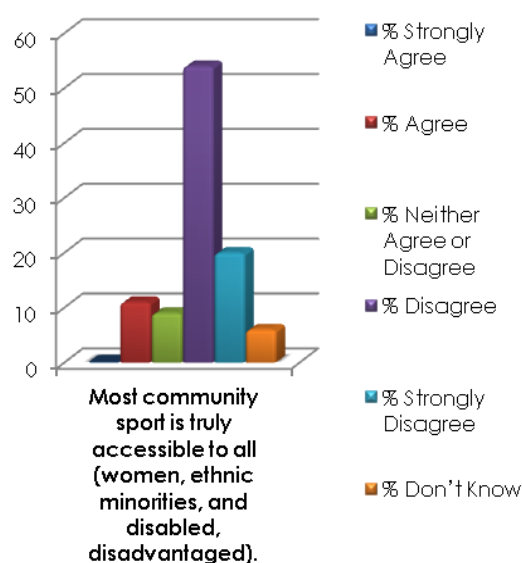


Figure 5 – Accessibility of Community Sport

Engaging people from under-represented groups was also identified as one of the major challenges to the sport sector and an important priority. There was also a broad consensus that the lack of accessibility and inclusivity in sport is compounded by: decreasing opportunities to view major events on free-to-air television; a lack of diversity in leadership positions in sports associations and biases in the media towards football and men's sport in general.

As we have seen previously, 72% of respondents also called for the Government to put greater pressure on the wealthier professional sports, such as the Premier League, to dedicate more investment to grassroots and community sport. This would give a new strength to the sporting pyramid uniting the sector and providing fresh and sustainable funding in the coming years.

Local Authorities

Local authorities received a wide range of comments from survey respondents, mostly converging on the opinion that they are doing an indifferent job of local provision. When asked directly, the

majority (55%) agreed that local authorities did not provide a good community sport and leisure service. This is a real issue for any new sport strategy as respondents also saw local authority provision and facilities as crucial to the success of the sports landscape. Facilities were also an issue for respondents to the survey: over 70% of people said there are not enough community sports facilities in England (Figure 6). Along with fears for the protection of playing fields, comments on facilities were made with respect to many of the same issues: funding to invest in new facilities and maintain existing ones is a major challenge for the future of the sport sector and should be among the policy priorities for the new Government.

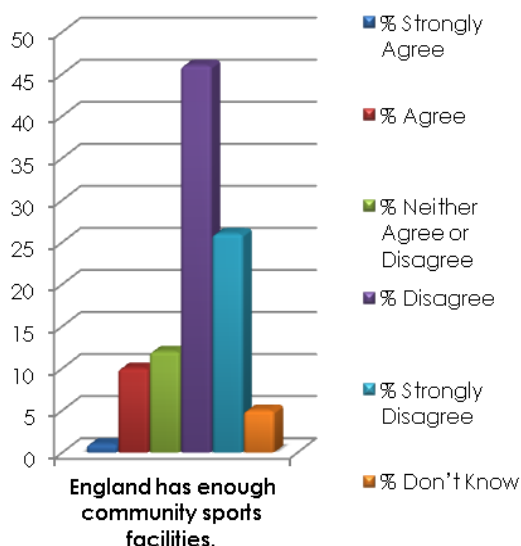


Figure 6 – Community Sport Facilities

The lack of investment and strategic allocation at community-level and reductions in budgets were identified as significant challenges to successful leadership at the local level. Many participants presented this as the biggest issue facing sports policy in the UK, given the cuts already made and the likelihood of more in future. Respondents predicted austerity-driven policy measures will impact those in the most deprived communities. Only 6% of respondents felt that further cuts would not impact significantly on local authorities' ability to provide an adequate sport and leisure service (Figure 7). Therefore, among the priorities for ensuring successful leadership at the local level, respondents argued that

long-term investment is needed in community leaders to deliver a wide range of sport and physical activity to develop community sports deliverers, supported by tax incentives.

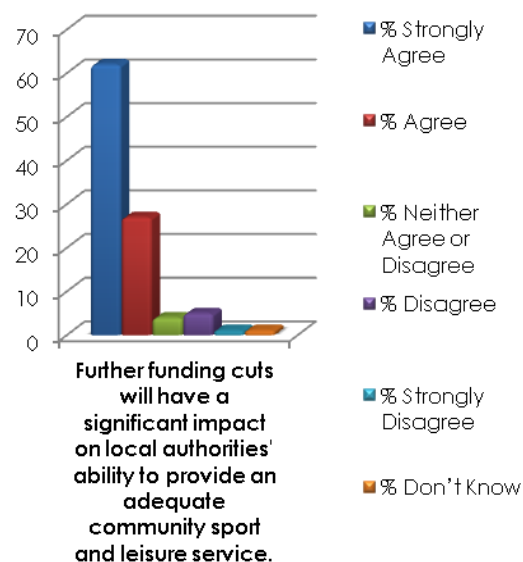


Figure 7 – Local Authority Funding Cuts

Given these generally negative responses towards local authority involvement in sport, it was not surprising that a number of respondents suggested that Local Government provision needed fundamental reform: this may come from further cuts. Whatever the scenario, it is clear that Local Government plays a crucial role in delivering a wide range of public policy, from grassroots and community sport, physical activity, recreation and in health and well-being, community integration and reducing low-level crime.

As the localised agenda is further implemented and more cuts come into effect, the way local authorities operate will be fundamentally changed regardless. Any new sports or health and well-being policies must understand, assess and review these significant changes and not only define what role local authorities should have, but propose new ways that sport can operate as one system, from the national to local level drawing together all the various strands of policy delivery that sport offers society.

Physical Activity

In the UK, physical inactivity directly contributes to one in six deaths¹⁵ and according to the National Institute for Health and Care Excellence (NICE), inactivity is costing the national economy in England £8.2 billion per year.¹⁶ Along with obesity, studies have found evidence to suggest being physically active improves mental health, through activities such as small-sided football games and structured exercise programmes. The evidence indicates physical activity reduces the risk of depression, and also improves self-assessed health and life satisfaction.¹⁷

While sport itself may not solve the inactivity crisis in this country, there remains an extremely strong link between sport at many levels (elite, grassroots, community sport and recreation) and physical activity. Moreover, the predicted reduction in GP visits as a result of good health associated with sport participation has a value to society in that it leads to cost savings for the NHS of £13.25 (all sports), £7.14 (team sports), £12.12 (individual sports).¹⁸ It is widely felt that these two policy areas need to be joined up at a strategic level and a stronger understanding developed between them, especially in delivery. Ensuring sport has the capacity to create new and accessible opportunities for people to keep physically active is therefore essential.

Participants in the survey were not convinced that consecutive governments have successfully addressed the issue of physical activity and indeed sport's wider role in combating public health issues, such as obesity. Just over a quarter of participants (26%) thought that the physical activity agenda has been successfully embedded into sports policy-making, whereas 42% believed it had not

(Figure 8). Among these issues, respondents suggested, "grassroots sport does still not adequately impact upon health statistics and the link between exercise, nutrition and sedentary lifestyles is still not being addressed correctly to affect sustainable change." Communicating these relationships at a policy level to the population is of great importance to ensure the full benefits of sport for health are realised.

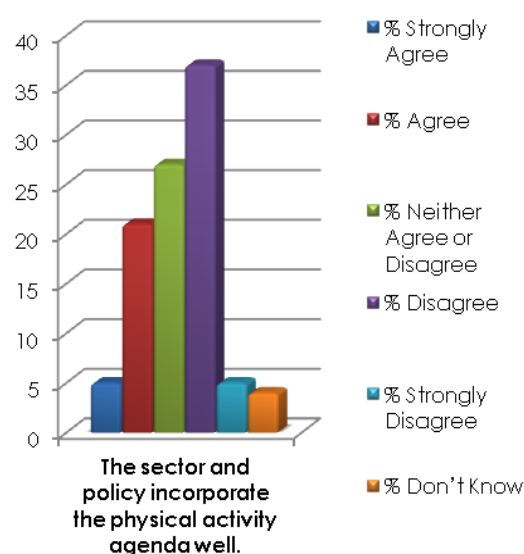


Figure 8 – Physical Activity and Sports Policy

Participants in the survey indicated increasingly sedentary life choices are one of the biggest issues facing policy-makers in this area. TV, computer games and other home-based activities are among a number of reasons why people are generally less active as a society in comparison to previous generations.

These factors were also identified in recent publications, which look to forecast future trends in sport. The Sport and Recreation Alliance's 'Future Trends' report in partnership with the Future Foundation found that involvement in, "formal, timetabled sports activities are becoming increasingly difficult to schedule into busy modern lives, requiring innovation". This report went on to say that "consumers are not willing to sacrifice indulgence for the sake of health benefit in their consumption habits."¹⁹ The Youth Sport Trust also worked with the Future Foundation to produce the

Class of 2035 report, which highlighted the potential risks of a new generation becoming sedated by exposure to digital devices, among other scenarios.²⁰

In addition to the feedback from the Sports Think Tank's sector survey, respondents urged the Government to play a more leading role in ensuring a cross-departmental approach to addressing physical inactivity is achieved. This would include Public Health England, the Department for Education and the Department for Culture, Media and Sport. Survey participants believed the Government is aware of the individual responsibilities to ensuring we have an active nation, however the necessary co-ordination between departments in order to find a solution remains problematic. This supports the belief in cross-departmental sports strategy and a strong understanding of the role sport – in its broadest definition – has in getting people active.

Two examples of innovative ideas to overcome the risks identified above and possible solutions to reducing the burden of physical inactivity on the nation's health included:

- The measurement of 'activity' not participation.
- The separation of recreation and performance-delivery in order to free national governing bodies of the responsibility of increased participation targets and allowing other organisations to fully embrace and focus on increasing recreational activity
- Creation of a robust, independent measure of health, fitness and competency levels in children and physical activity levels for adults

PE and School Sport

The PE and Sport Premium was introduced to help primary schools improve the quality of the PE and sport activities they offer their pupils by the Coalition Government in 2013. Over the three years until 2016, the Government plan to invest a £450 million, which sees schools awarded specific grants on the basis of how many pupils are in the school²¹. The policy replaces the School Sports Partnerships (SSPs) – a programme introduced by the Labour Government which involved groups of primary schools and secondary schools collaborating under centrally-funded partnership development managers and SSP coordinators.

Physical education and school sport featured prominently among responses to the survey. On specific policies, opinion was broadly divided on the impact of both the School Sport Premium funding and the School Games programme, which was introduced to promote competitive sport between schools. When presented with the statement ‘the PE and Sport Premium for primary schools has been a success’: 37% responded that the initiative has been unsuccessful, many other respondents felt they neither agreed nor disagreed (31%), and others were not in a position to make a judgment (22%, Figure 9). This policy also remains a political one: post-election Labour reignited its criticism of the Government for cutting its School Sport Partnerships, a flagship sports policy under Tessa Jowell. Anecdotally we understand that many communities still operate successfully in this way and there remains some ongoing support in some parts of the sector for the School Sport Partnership approach. While early government research indicates that the School Sport Premium is having a positive impact, our results indicate, that policy makers and the sector should allow more time for the current strategy to be fully

embedded, and it should also undertake further research into the impact of the policy before looking for alternatives.

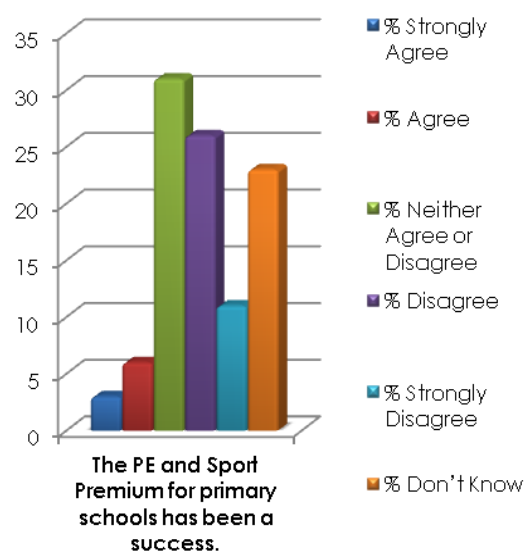


Figure 9 – School Sport Premium

These two policies and the equivocal views they draw in the sector are indicative of a wider feeling among the participants of this survey, that lack of consistency in school sport policy over successive governments in the past 10 years and that it is not a significant priority in the school curriculum has made it hard for schools to achieve high quality provision and benefits from that.

In responding to an open question on the desired policy priorities for the new Government, school sport rated highest as respondents' first-choice. Those that answered had three broad policy asks for the Government's PE strategy:

- PE is raised in status in schools to an equal level with literacy and numeracy
- More curriculum-time is devoted to sport and physical education
- More specialist teachers are trained to deliver PE in schools

PE and school sport were cited as in need of more funding and greater investment, with regards to both more specialist teachers and to investing in school sports facilities and protecting existing ones. Some responses included the suggestion

that independent schools should be made to share their facilities more with local state schools to help improve the standard of state school PE provision.

In terms of further policy ideas and suggestions, one notable theme across the entire survey was the feeling of a lack of cooperation and unity in the sport sector and school sport was no exception. With a myriad of providers in and around school sport, third sector organisations, private companies and teachers make for a confusing landscape and an even more mixed quality of provision. Many agreed that this needed to be resolved through a more collaborate and joined-up approach to establishing a fairer market place among charitable organisations. Some suggested that at sector level, Sport England, with the right insight and skills, should provide the necessary coherence in approach to sport: from 0-18 years and 18 and over, thus joining up the pathway of sporting activity and better reflecting the reality of a person's lifelong sporting journey.

Interestingly, over 70% of respondents believed schools should record children's fitness levels' (Figure 10) – one policy idea among many to help address childhood inactivity and to better measure whether a schools' approach to physical activity is working or not.

Respondents felt that the Government should do more to define the role of PE, sport and physical activity and subsequently align specific programmes to help achieve different outcomes such as education and health. It was broadly felt that these two government agenda do not collaborate well enough.

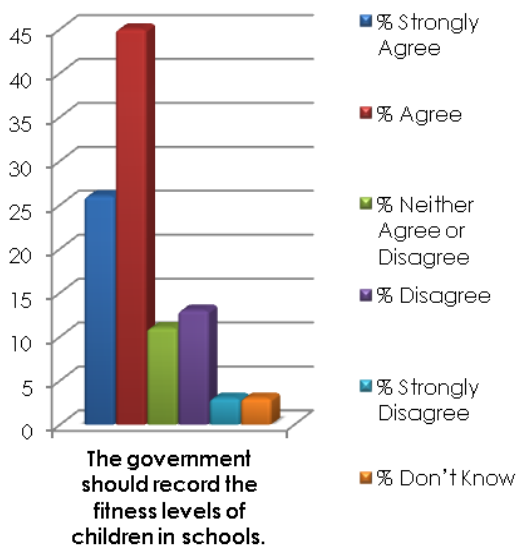


Figure 10 – Measuring Fitness Levels

Major Events

UK Sport's Gold Event Series strategy is focused primarily on attracting World Championships, European Championships and premium World Circuit events. The organisation has targeting hosting of 100 major events through to 2023 in the UK.²² Among the major events taking place in UK over the next few years are the Rugby World Cup in September 2015, the Athletics World Championships and the Euro 2020 Football Championships.

In July 2014 the Government and the Mayor of London jointly released the second annual *Inspired by 2012* report. The report sets out a number of legacy findings two years on from the London Olympic and Paralympic Games, specifically referring to: sport and healthy living; the regeneration of East London; economic growth bringing communities together and the legacy of the Paralympics.

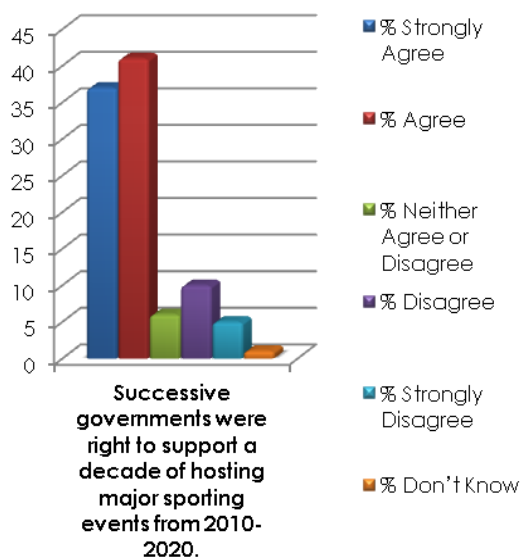


Figure 11 – Current Decade of Sport

Furthermore, in their 2014 report, *Persuasion and Power in the Modern World*, the House of Lords Select Committee on Soft Power and the UK's Influence highlighted how the 2012 London Olympic and Paralympic Games showcased many attractive features of

the UK, including cutting-edge technology; innovation in infrastructure; management and organisational skills; helpful volunteers; and enthusiastic audiences.²³ Moreover, the British Council regard sport as 'the most accessible and exportable of the UK's soft power assets'.²⁴

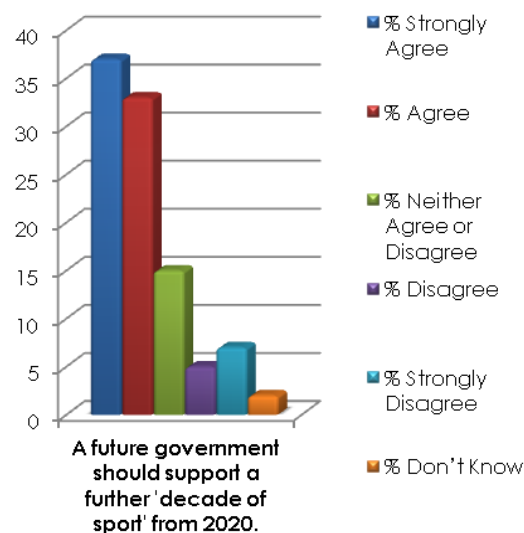


Figure 12 – Future Decade of Sport

Major events were highlighted as a success of recent sport policy in the UK. A high number of respondents backed Government policies that showed intention to attract major sporting events to the UK, with three-quarters of participants (74%) saying successive governments were right to support major sporting events from 2010 to 2020 (Figure 11). Furthermore, 70% of respondents supported the case for another 'decade of sport' after 2020 (Figure 12). Attracting major events to the UK was stated as one of the top policy priorities for the Government.

Those surveyed said that major events were an inspiration to the population and raised the profile of many minority sports. The major criticism however, was over the Government's failure to exploit the benefits of hosting the Olympic Games and turn them into the promised legacy of participation. A few respondents also indicated that the Government was at fault for not effectively communicating the wider returns on the huge public financial investment in the Olympics.

Elite Sport

UK Sport is non-departmental public body which provides strategic investment to enable Great Britain's Olympic and Paralympic sports to achieve success. The organisation is responsible for the 'top end' of Britain's sporting pathway, supporting athletes and sports to compete and win medals at the Olympic and Paralympic Games.²⁵

Following London 2012 Games, some Olympic sports such as basketball had their funding cut because they stood little chance of winning a medal, despite over 200,000 people playing the sport every week. Following a consultation on UK Sport's approach to funding individual sports, participation will now be used as a factor in deciding whether a sport receives development funding even though it is unlikely to win a medal.

While some respondents were critical of grassroots and community sport legacy, they were very clear about the successful return on investment in terms of the number of medals won. Elite sport was a major success of government policy over ten years and respondents were positive about the clear link between the sustained period of investment in elite sport in the lead-up to The Olympics of 2012 and the elite success it yielded for Great Britain.

It was encouraging to see that the survey found that over half of those who responded (54%) believe that the UK currently has successful development pathways in elite sport, although 21% neither agreed nor disagreed with this statement. Respondents also broadly felt that there are currently enough facilities in the UK to meet the training needs of elite athletes (41%), although 31% thought we did not and a further 22% neither agreed or disagreed with the statement.

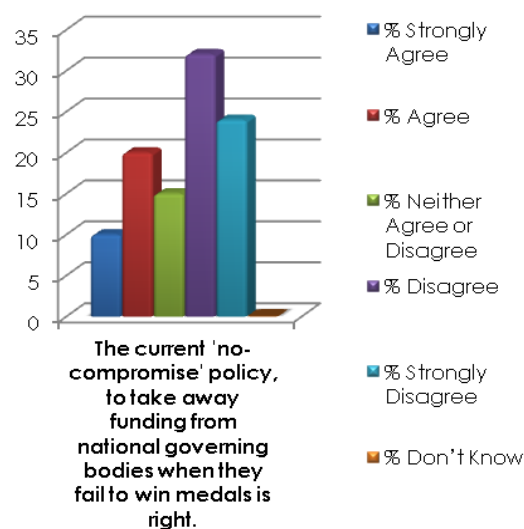


Figure 13 No Compromise Policy

When questioned however, over half of survey participants (56%) stated they disagree with UK Sport's 'no compromise' strategy, to remove funding from NGBs when they fail to achieve success at the elite level. While this survey was carried out before UK Sport had announced the conclusion of the consultation into its funding strategy, with this now announced the broad sector view remains that concerns have not been addressed adequately. While it may take time for this new policy to bed in, it is likely that the issue of 'no compromise' will remain. While the policy is clearly yielding results, results supported by the sector, there perhaps remains some room for a modified policy to ensure the system has some flex in its ability to support those sports just outside the system and working closely with Sport England will be crucial here. This opinion was echoed in many responses to an open question on the future risks and challenges to the sport sector, where some respondents cited an imbalance of funding across NGBs, some "rich sports" enjoying a disproportionate share of investment and the resulting reinforcement of sport as a "middle-class activity". Governance surely also plays a role here and sport must also, as we have seen in the results above, play its role in ensuring a sport is well governed to the highest possible standards.

A number of respondents stated a redistribution of funding among NGBs as one of their policy priorities for the Government. The issues of inclusivity and accessibility to sport drew further comments in this regard: while funding was one aspect that affects elitism and equality in sport, responses also highlighted the urge for more to be done to achieve greater diversity on the boards of NGBs and to support elite athletes from diverse backgrounds.

Professional Sport

Professional sport continues to evoke a conflicting set of opinions. Ultimately respondents wanted the growth and success of our professional sports to continue, with 60% saying the Government should encourage the free-market growth of professional sports.

Yet, at the same time, over 80% thought that Government intervention in ticket re-sales and 85% of respondents in integrity issues was justifiable (Figure 14).

Furthermore, accessibility, and inclusivity were prominent themes, with many comments relating specifically to the sport of football. When asked to state the greatest risks and challenges faced by the sport sector in the future, a significant number of respondents cited the growing gap between professional and grassroots sport. Football was singled-out by respondents as the prime example of a sport where there is a great imbalance of money and resources: as the top-end flourishes financially, the game suffers at grassroots level.

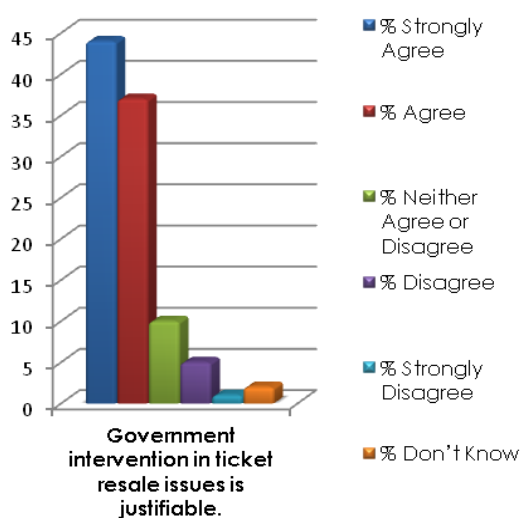


Figure 14 – Intervention in Ticket Resale

Many respondents also commented on the need for a redistribution of wealth in football, perhaps through a greater government levy on The Premier League to secure some of the money from broadcasting rights for the benefit of the grassroots game. One respondent's policy priority for government was; "Regulation of Premier football league funding... to benefit community football".

The issue of broadcasting drew further comments: the survey found a view that sport is becoming a prohibitive experience not only to play, but also to watch, with the least well-off unable to view many major sporting competitions and fixtures that have been moved away from free-to-air television. This is despite the fact that 57% of British households have TV subscriptions to the likes of Sky and Virgin²⁶. The survey also indicated that the sport available to watch is too biased in favour of football and in favour of men's sport in general.

The survey also found a predominant view that the Government has not properly addressed the demands from football fans with regards to the governance of professional clubs. While this was not a major priority, respondents stated that successive administrations have not effectively intervened on football matters, specifically with regards to the oversight of governance structures and scrutinising club owners. While there were few responses explicitly directed at specific aspects of sporting integrity, like doping or match-fixing, there were a significant number of responses urging policy action on wider corruption and good governance, particularly in football and particularly; "corruption at the international level of governance." While it was proposed that the Government addresses football club ownership as a policy priority, no specific references were made to facilitating fan-ownership of football clubs.

These views represent what we have heard over the last year and are often reflected in the media. They represent a challenge for policy-makers however: we

want our best professional sport to lead the world and draw in the best players and leagues, yet not at any price. Government, whilst having limited authority to intervene in professional sport, opinion supports them having a role to curb the extraordinary excesses where it is necessary. It will be crucial therefore that any new sport policy re-examine the 'pyramid of sport' that has its roots deep in our sporting history and assess where change is required. If it does not it is likely that the pyramid, which many argue is already dead, will die completely. This survey reveals there is no doubt the widening gap between top-level sport and the grassroots or community is an ongoing tension in sport policy and gives policy-makers some evidence to support them in ensuring this gap does not widen further.

Conclusion

This report provides a broad assessment of views of the sport sector about the current sports policy, while also identifying the risks, challenges and approaches that need to be prioritised in the development of a new sport strategy.

Current Policy

The findings indicate that both the elite funding of sport and its success at winning medals, and the decade of sport have been the most successful policies of the last ten years.

Community sport and increasing participation policies however, have not achieved what the Government or sector had hoped. The Active People Survey remains a divisive measure of sports participation and funding has not supported, over time, enough real innovation: those organisations that have adapted their offer to a changing society and the rise of technology to meet consumer demands. This is coupled with a strong concern about the role of local authorities: whilst ongoing funding cuts are having a significant impact, the fundamental role of local authorities in relation to any Central Government policy-making needs to be debated and new principles established, especially around what community facilities are available. There is also strong support for the private sector to be more involved and engaged in supporting community sport.

Furthermore, while progress has been made to ensure 'access for all', this still has a way to go before sport can claim it is truly representative of society.

The Coalition Government's school sports policy remains in the balance: while there is good support for the current approach there still remains broad scepticism about

the policy, indicating that this will need more time to prove successful.

Just as challenging is the balance between the desire to create a policy environment in which professional sport can flourish both domestically and internationally, while ensuring that these sports have integrity, whether this is ticket resale, corruption, governance or betting integrity-- in which many respondents felt the Government should intervene because sport itself was failing to grasp these issues sufficiently.

Furthermore, the sector supports more general calls for our wealthiest sports to further invest in community and grassroots sport as their commercial revenues increase. This goes to the heart of the traditional 'sports pyramid': that sport is a self-supporting structure where those at the sporting pinnacle and those who have a recreational interest are linked and support each other. This gap between the wealthiest and poorest, according to the findings of this report, must be reduced in terms of participating, accessing and supporting sporting activity. The state plays an increasingly integrated role in this relationship because sport matters on many levels: from hosting the Olympics and Rugby World Cups; to creating economic growth and as a tool of soft power abroad; through to the significant social and health benefits to society and in our identity as a nation.

Priorities

There are of course many priorities but from this research, but we suggest that grassroots, community and recreational sport are at the top of the list. There is a strong belief that the Government needs to explore the role and direction of community sport policy. Broadly it is felt that sport for development (the impacts that sport can have across a wide range of policy areas) should play a central role in any new sport policy. To achieve this, a cross-departmental approach to using sport to make an impact on physical activity, anti-social behaviour, community

integration, volunteering and instilling character and resilience through sport is vital. Sport must also be accessible for all (disadvantaged, disabled and women and girls).

Furthermore, the role of local authorities needs major reform especially as further funding cuts will significantly undermine what they can provide at a time when most believe that local services and facilities are poor and inadequate. A new framework is needed for the next 10 years that reflects the reality of provision while integrating the new responsibilities at a local level including Police and Crime Commissioners and Health and Well-Being Boards.

As well as local authorities, national governing bodies and third sector organisations should play a crucial role in the long-term investment into community sport, as a part of a mixed-economy approach, along with a greater role for the private sector. The key to this is product adaption – the creation of new models based on traditional sport but dovetailed with modern life and technology.

Secondly, there is strong support for the funding of elite athletes and another decade of sport from 2020.

Thirdly, whatever the view of how better PE provision should be achieved, what is clear is school sport should be a key priority and elevated further in status in any new sports strategy. Fitness-testing should also be considered.

Finally, there was good support for the Government to define its role in helping to find a balance between our strong free-market approach to sports, revenue redistribution mechanisms and specific interventions in certain circumstances such as fans rights, ticket-resale and integrity issues whether doping, betting or governance.

New Approaches

The research also offers policy-makers and the sector with some potential guiding principles as the Government draft a new sports strategy.

Firstly, there is a need for stronger leadership at both Central and Local Government level. The development of a new ten-year, cross-departmental joined-up strategy for sport remains central to achieving this. This strategy not only needs to set out the Government's objectives for sport but provide clear definitions of sporting activity, ensure that there are strong links between the many facets of sporting activity and ensure that the role of Local Government in an ever evolving structural, institutional and financial landscape is embedded.

Secondly, a strategy is not enough in itself as fresh perspectives and more independent input is needed. The existing sports sector has much experience and will be critical to achieving this but it is time to call on different approaches and ideas rather than just rely on those who have dominated the debate since the last thorough overhaul of Government sports policy in 2002. The sector believes there is a lack of innovative ideas in sports policy.

Both policy-makers and the sector need to encourage and facilitate more innovation and entrepreneurship whilst having a stronger focus on consumer needs and demand. More creative thinking around products, platforms and content will not only help attract more funding but also to meet the demand from consumers. The strategy needs to embrace new players like technologists, entrepreneurs, new tactics and the private sector if it is to maximise the potential of sport to improve sports participation and the nation's health, fitness and well-being.

Furthermore, the strategy should also look to provide a mechanism that will embrace and develop innovation and the use of technology in designing future sports policies over the next ten years. Here we believe a new innovation unit is needed.

Thirdly, there is a strong argument that there needs to be a public debate about the role of sports policy and funding in national life. There is a need for expanding the independent space to debate and bring in new thinking from innovators and entrepreneurs, academic research and views from other sectors. By inviting those many organisations and institutions to debate the issues; discuss the problems; share experiences and best practice will shine a refreshing light into the sector. In doing so, the sector will be able to mature with a stronger collective approach.

Fourthly, the sector also needs to ask itself how it can better work together to ensure it is creating a strong intellectual backbone. This will emerge from debating the issues in sport collectively and widely and by using technology to collect and analyse data. This is especially true at grassroots, community, leisure and recreational sport levels. Both of these approaches will help to build and create a

stronger evidence-base, and equip the sector with the arguments it needs for a more effective and collective political voice.

Sports policy is complex, as much for its reach as for its impact. Society has changed and, while parts of sport have also, others must now catch up and excel. The announcement of a sport strategy consultation provides a unique opportunity to reassess what our sport priorities should be, what our objectives are for the coming years and how we approach these successfully. *Game Plan* was a document of its time informing a generation of sports policy-making. It has given policy-makers and the sector a strong base from which to build new policies for the next 10 years. This survey reflects a strong appetite for change: to embrace new players and new tactics to mature the framework in which sport policy operates and better meet consumer needs and demands in 2015

Appendix A: Closed Question Data

Please state to what degree you agree with the following statements:	% Strongly Agree	% Agree	% Neither Agree or Disagree	% Disagree	% Strongly Disagree	% Don't Know
1. Sports policies in this country are good.	0.00	29.76	19.05	38.10	11.90	1.19
2. We need a public debate about why the Government invests public funds in sport.	38.10	32.14	10.71	14.29	4.76	0.00
3. The Government needs a 10-year cross-party strategy for sports policy.	58.33	27.38	8.33	3.57	1.19	1.19
4. Central Government provides clear and strong leadership in the sports sector.	0.00	10.71	20.24	48.81	20.24	0.00
5. Local Government provides clear and strong leadership in the sports sector.	1.19	4.76	25.00	50.00	17.86	1.19
6. DCMS, UK Sport and Sport England should remain primary providers of sports policy and funding in the future.	11.90	41.67	23.81	15.48	5.95	1.19
7. Sports policy-making needs fresh perspectives and more independent input.	54.76	40.48	1.19	1.19	1.19	1.19
8. The sports sector has a strong intellectual backbone based in clear evidence and data.	4.76	17.86	17.86	40.48	16.67	2.38
9. The sector has an effective, strong, and collective political voice.	1.19	8.33	10.71	54.76	23.81	1.19
10. The current 'no-compromise' policy, to take away funding from national governing bodies when they fail to win medals or meet their participation targets, is right.	9.76	19.51	14.63	31.71	24.39	0.00
11. The Active People Survey is a valid measure of sport participation in England.	6.10	19.51	12.20	37.80	21.95	2.44
12. The Government should use levies on certain richer, more commercial parts of the sector to fund other parts.	23.17	41.46	15.85	12.20	4.88	2.44
13. The private sector should invest more in community sport.	26.83	45.12	20.73	4.88	1.22	1.22

Please state to what degree you agree with the following statements:	% Strongly Agree	% Agree	% Neither Agree or Disagree	% Disagree	% Strongly Disagree	% Don't Know
14. National governing bodies should think creatively about products/platforms/pricing/content to satisfy sponsors, broadcasters and customers.	30.49	48.78	14.63	3.66	0.00	2.44
15. The sports sector should foster stronger relationships with innovators and entrepreneurs to meet consumer demands.	36.59	48.78	10.98	0.00	3.66	0.00
16. Government intervention in professional sport is justifiable when it comes to current corruption and integrity issues.	48.15	38.27	4.94	7.41	0.00	1.23
17. The government should continue to encourage the free-market growth the professional sports.	17.28	41.98	18.52	14.81	3.70	3.70
18. Government intervention in ticket resale issues is justifiable.	44.44	37.04	9.88	4.94	1.23	2.47
19. The UK currently has successful talent development pathways in elite sports.	8.64	44.44	20.99	14.81	7.41	3.70
20. The UK has an adequate number of elite sports facilities.	3.70	37.04	22.22	22.22	8.64	6.17
21. Successive governments were right to support a decade of hosting major sporting events from 2010-2020.	37.04	40.74	6.17	9.88	4.94	1.23
22. A future government should support a further 'decade of sport' from 2020.	37.04	33.33	14.81	4.94	7.41	2.47
23. Local Authorities currently provide a good community sport and leisure service.	2.47	14.81	25.93	39.51	16.05	1.23
24. Further funding cuts will have a significant impact on local authorities' ability to provide an adequate community sport and leisure service.	61.73	27.16	3.70	4.94	1.23	1.23
25. England has enough community sports facilities.	1.23	9.88	12.35	45.68	25.93	4.94
26. Most community sport is truly accessible to all (women, ethnic minorities, and disabled, disadvantaged).	0.00	11.11	8.64	54.32	19.75	6.17
27. Sport policy should recognise the distinctive role that sport can play in wider policy outcomes including improving community integration, boosting	64.20	28.40	3.70	1.23	2.47	0.00

employability and reducing crime.						
28. The sport sector and sport policy incorporate the physical activity agenda well.	5.17	20.99	27.16	37.04	4.94	3.70
29. The PE and Sport Premium for primary schools has been a success.	2.50	6.25	31.25	26.25	11.25	22.50
30. The School Games made a positive impact on competitive sport in schools	3.75	25.00	26.25	16.25	10.00	18.75
31. The Government should record the fitness levels of children in schools.	26.25	45.00	11.25	12.50	2.50	2.50

Appendix B: Open Questions

The following five open questions were also asked in the Sports Think Tank survey:

1. What have successive governments' sport policies achieved over the last 10 years? What have they done well and poorly?
2. Should public funding increase, decrease or stay level as a proportion of government spending?
3. In your view, what are the future risks and challenges to a successful and flourishing sports sector?
4. Looking ahead to 2025, what three policies would you want the parties to prioritise in their 2015 general election manifestos?
5. In order of priority, what 3 innovations or reforms you would like to see the sports sector embrace?

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