



FUTURE
FOUNDATION

SPORT WALES
ADVISORY GROUP

ACTING TODAY FOR AN ACTIVE TOMORROW

TRENDS WHICH WILL TRANSFORM SPORT IN WALES



CONTENTS

Foreword	3
Executive Summary	4
Introduction	8
Generating views of the future	8
Different types of trends	9
Scenarios of the future	9
The structure of the report	10
Consumer trends affecting the future of sporting participation in Wales	11
Changing Society	12
A Shifting Economic and Political Landscape	18
Changing Identities	23
Switched on Society	28
The Digital Revolution	31
Healthier Lives	35
Engaging Consumers in the 21st century	38
Scenarios for future sports participation in Wales	43
Scenarios designed to differentiate a range of future options	43
The critical uncertainties: cultural mindset with regards to sport and the degree to which policy makers directly seek to empower or inhibit sport	43
Assessing the four scenarios	51
Appendices	53

FOREWORD

The world around us is changing and it will continue to do so. That is one of the only things about our future world of which we can be sure.

We are all aware that for our businesses and indeed our lives to keep pace with the world of today and prepare for the world of tomorrow we have to make changes. The challenge is deciding what changes we need to make. In order to do this we have to be aware of what is happening now and be as sure as we can be that we invest strategically and sensibly in our futures. For example, in our own lives, how do we decide what sort of Smart TV to buy when competing manufacturers are releasing completely different operating systems? This is the sort of difficult decision you are faced with whether you are a supplier or a consumer and one that could see the rise or fall of your financial future.

Change is a risky and expensive business, so one way to mitigate risk is to make sure we all have access to the latest thinking on consumer insights and trends. It is important to use this information in conjunction with the best political, social, demographic and financial projections. This is not uncommon to the business sector and it is the way that many products and services are often developed. Like it or not, in today's world we have to think of sport as a product and a service if we are to attract more Welsh citizens to participate in sport and physical activity.

So, the Sport Wales Advisory Group, an independent group of volunteer experts from a range of sectors, have in a UK-

first, worked with trends forecasters to predict the future of Wales and how sport can remain relevant, available and attractive to all.

This report is not just relevant to the sports sector. Alongside our sports colleagues we have worked with partners from the world of health, education and the third sector to make this report relevant to the whole of Wales, with the potential to impact on the health and wealth of our nation.

This report is rich in information and outlines seven main themes that will impact on the Welsh population over the next 15 years. Importantly it also gives clear guidance on the implications and trends for the future of sport that all of us must heed.

I would like to thank our partners in this report for their support, along with the experts who gave their time to be interviewed. Thank you also to the members of the Sport Wales Advisory Group who have given up an incredible amount of their time to develop and deliver this report.

The Sport Wales Advisory Group now calls on the sport sector to work with health, education, political and business stakeholders to establish a working group to take the recommendations of this report forward.

Helen Humphrey
Chair Sport Wales Advisory Group

ACKNOWLEDGEMENTS

Sport Wales would like to thank for following sponsors for their help and support in the production of this report.



EXECUTIVE SUMMARY

Future Foundation has embarked on an extensive research programme in the development of this report. The first stages comprised a knowledge review of existing evidence, which drew upon available public research and the broader impact of Future Foundation's trends, creating the building blocks for the later stages of the project. As part of this work, bespoke qualitative research was conducted in different regions of Wales amongst participants who took part in physical activity with varying frequency and this was supplemented by a range of expert interviews from people with different perspectives on the challenges and opportunities that sport in Wales faces. Such research was used to guide a detailed trends analysis that, in conjunction with stakeholders, highlighted the key future trends which will have the greatest impact on the future of sporting activities. The outputs from all these core stages of research were drawn together in numerous future scenario development exercises, in order to develop four distinct scenarios of the potential future for sport in Wales.

A snapshot of our findings are outlined below.

THE KEY THEMES THAT WILL SHAPE THE FUTURE OF SPORT IN WALES

Demographic forces will create ever more flexible, less linear lives

The shifting demographic landscape of Wales towards an ageing but also ageless society will have a profound effect on the makeup of the Welsh population and, perhaps more significantly, on how they view themselves and their lives. Sport and exercise will, increasingly, have to operate within a framework where age has less of an impact on peoples mindsets and many of the old assumptions about who wants to do particular sports at particular stages of their life will be less and less true. The

same trends mean that engaging people in sport consistently throughout their lives will be a challenging task, but our research indicates that dropping out of certain sports will not be as irreversible as it once was.

Resources should be concentrated on reducing the impact of social inequality on sport

All key indicators suggest we will see steady economic improvement in Wales over the short to medium term. The average consumer will have more money in their pocket, and the sports sector is entitled to believe that it can compete aggressively for a share of that extra spend. At the same time, there will be growing social inequality and therefore great care and investment will have to be directed towards the more vulnerable segments of Welsh society if they are not to become increasingly marginalised when it comes to sport and exercise. At a time when public spending is being curtailed and people are more sceptical about welfare spending, ensuring that funding is channelled towards those least well off will continue to be a priority for policy makers.

Understanding shifting online and offline identities will be crucial for sports providers

The increasingly shareable nature of consumers' lives through social media, the rise of celebrity culture and a heavy media spotlight all mean that the definition of personal identity is changing. Increasing numbers of consumers take great care of how they look and the "life story" that their social media output tells about who they are. Offline identities remain important; hyper local role models and events will be crucial in ensuring continued sporting inspiration. Societal confidence in sport will continue to vary and adapting services to generate a sense of inclusion for all will be key to long term participation.

More demanding and time poor consumers will necessitate enhanced levels of commercial competitiveness from sport providers

The typical consumer of today already feels under significant time pressure and all the signs suggest that this will continue to be the case. Sports participation will have to fight for its place on our daily to-do list, for example, by bringing sport to where the people are, rather than forcing them to seek it out, or by capitalising on consumers' increasing desire to escape from their hectic lifestyles. Sports provision should be viewed as existing within the commercial market, not independent of it. Generating this commercial mindset among sports providers will be paramount to meeting the challenges of the modern consumer landscape.

Unlocking the full potential of the digital and data revolution will be fundamental in transforming how people engage with sport

Engagement with technology, through smartphones and tablets, and their associated applications, is already a mainstream characteristic of Welsh society. The rise of the Networked Society will increasingly change how people co-ordinate and take part in sporting activities. At the same time, the use of quantified apps and devices will prove crucial in keeping people engaged with sport, while also generating a wealth of actionable insights on sporting behaviour. However, responding to the threat of growing digital divisions within Welsh society will be vital if the full potential of the Digital Revolution is to be unleashed.

Sports providers will need to respond to the health demands of an ever more informed, autonomous and self-regulated consumer

Galvanised by the Digital Revolution and historic levels of government intervention, many Welsh consumers are becoming better informed, and more actively engaged, in their personal health management. While people are adopting more progressive mindsets regarding their health, consumers will also continue to seek quick-fix and not medically approved methods to achieve their goals. Looking further ahead, rising health costs will create a strong argument for greater early intervention through increased engagement with sporting activities. Adopting a mixed approach that utilises a government led educational strategy, while also stimulating more responsibility on an individual level will prove most successful in achieving long-term changes to people's attitude towards health.

Engaging consumers in the 21st century will bring fresh challenges

The typical consumer of 2014 is hard to please. They increasingly recognise that it is they who have all the power and have become more and more demanding to those providing the products and services they buy. The future will be more of the same, as technology and increasingly eager-to-please providers combine to give consumers more and more power to make risk-free and ever more optimised decisions. Sport will in no way be exempt from these changes.

VISIONS OF THE FUTURE: SPORT IN 2026?

As stated above, these key themes have been used as the building blocks for generating four opposing and currently uncertain visions of the future of sport in Wales.

These will be fully explored later in the report, but the four scenarios are outlined overleaf.

SCENARIO A: TALK THE WALK

Key Characteristics: Empowering policy but Inactive cultural mindset

This is a world where the public policy at all levels has been perfectly developed to promote and empower participation in sport. However, there has not been a concomitant swing in cultural attitudes; the success in the design of the policy implemented has not been reflected in, nor had a major impact on, the views and actions of broader society. The policy has been ineffectual due to poor communication, poor implantation or inappropriate delivery (or all three). Consequently, the policy framework has been unable to engage with a public which shows a strong unwillingness to change and has failed to put theory into practice. In sum, this is a world of wasted opportunity and resource, where the focus has been on promoting the supply without having any impact on demand.



SCENARIO B: SPORTOPIA

Key Characteristics: Empowering policy and Active cultural mindset

In this world, the Welsh citizen enjoys both optimal opportunities to engage in sport and the mindset that ensures they make the most of such opportunities. In such a scenario, there will be strong cross-sector collaborations and all barriers to participation are identified and removed. The policy framework will be communicated well and implemented successfully. Moreover, there will be clear evidence of the impact of this on other key policy areas, such as health, education, transport etc. In sum, this is a world which enjoys a clear long-term view of how sport can be optimally promoted and this has resulted in transformative action.





SCENARIO C: COUCH CULTURE

Key Characteristics: Inhibiting policy and Inactive cultural mindset

In this scenario, the Welsh citizen suffers from an inactive mindset and policy does nothing to alter this attitude if anything, it encourages it. This is a passive society where inactivity is the norm. Policies and agencies are both disjointed and there is no clearly defined strategy of how to attempt to turn around the underlying cultural norm. In sum, this is the worst of both worlds, where poor strategy and unfavourable societal norms combine to create a scenario where sport participation is at an all time low.



SCENARIO D: AGAINST THE ODDS

Key Characteristics: Inhibiting policy but Active cultural mindset

This scenario is characterised by a transformation in societal norms towards more active lifestyles, despite very little support from public policy. Here we find frustrated consumers, who want to take on more sporting activities but are hampered by a lack of opportunity. As a consequence, many new service provisions develop through the private sector, which puts added strain on the polarisation of opportunities between the 'haves' and the 'have not's'. Any progress made in this scenario will be in pockets of excellence (among those with the most resources). In sum, this is a world in which societal attitudes have developed in spite of poorly delivered policy; any progress will likely be short lived if the infrastructure is not put in place to capitalise on the apparent shift in consumer mindsets.



INTRODUCTION

While recently released data paints an encouraging picture of increasing levels of adult and child participation in sport, Sport Wales recognises that the long-term future of active engagement is under threat from a variety of sources including, political, economic, social and technological.

As a result of this, the Sport Wales Advisory Group has commissioned Future Foundation, an established and respected trends and insight consultancy, to look at the future of sport in Wales and opportunities for greater sporting engagement.

Sport Wales is the national organisation responsible for developing and promoting sport and physical recreation in Wales, and leading the sport sector in line with their Vision for Sport in Wales: *“to unite a proud sporting nation, where every child is hooked on sport for life and Wales is a nation of champions”*.

Recent data from the Sport Wales Active Adults Survey shows a major jump from 29% of the adult population taking part three or more times a week in 2008 to 39% in 2012. That represents: an incredible 262,000 more people, a 34% increase in the number of people enjoying the many benefits of sport. In addition, according to the School Sport Survey 2013, the number of young people who take part in a sporting or physical activity three or more times a week has risen from 27% in 2011 to 40% in 2013.

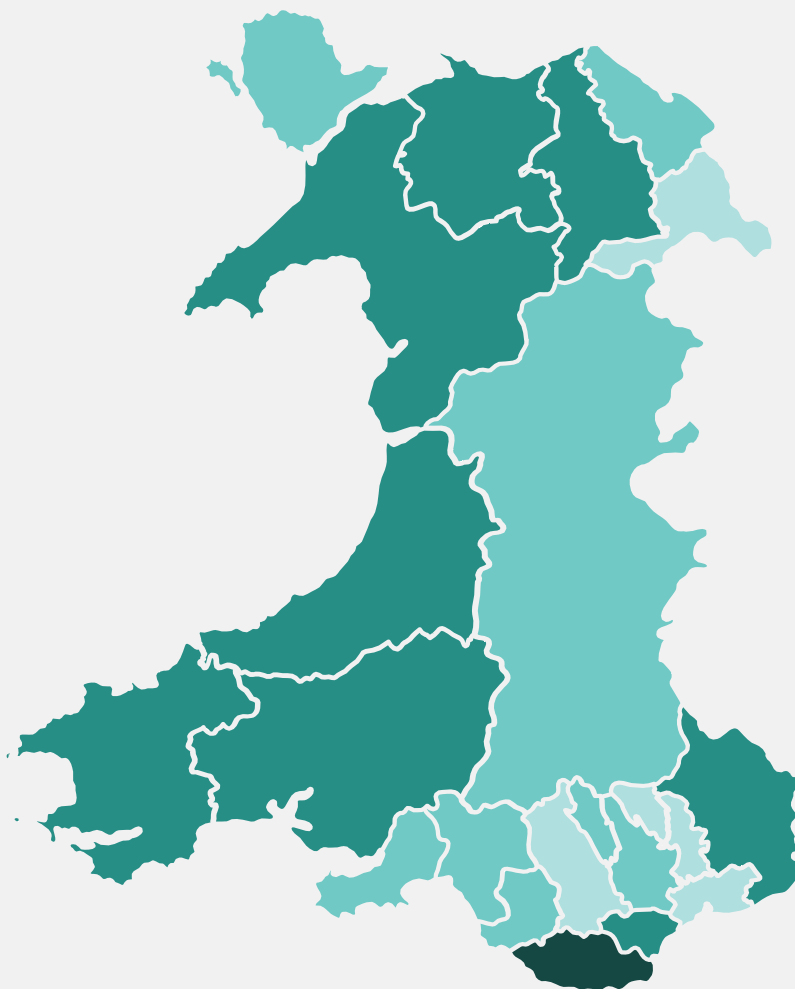
Keen not to take such further future increases in participation for granted, the Sport Wales Advisory Group is leading a project to look strategically at the long-term trends likely to impact on sport in Wales between now and 2026. This is a significant date, as the Programme for Government commits the Welsh Government to work with partners to explore the feasibility of bidding to host the Commonwealth Games in the second half of the next decade.

The outcome from this project, *‘Acting Today for an Active Tomorrow’*, will be a

SPORTS PARTICIPATION IN WALES

Hooked on Sport

% of Welsh population participating in sports three times a week or more often



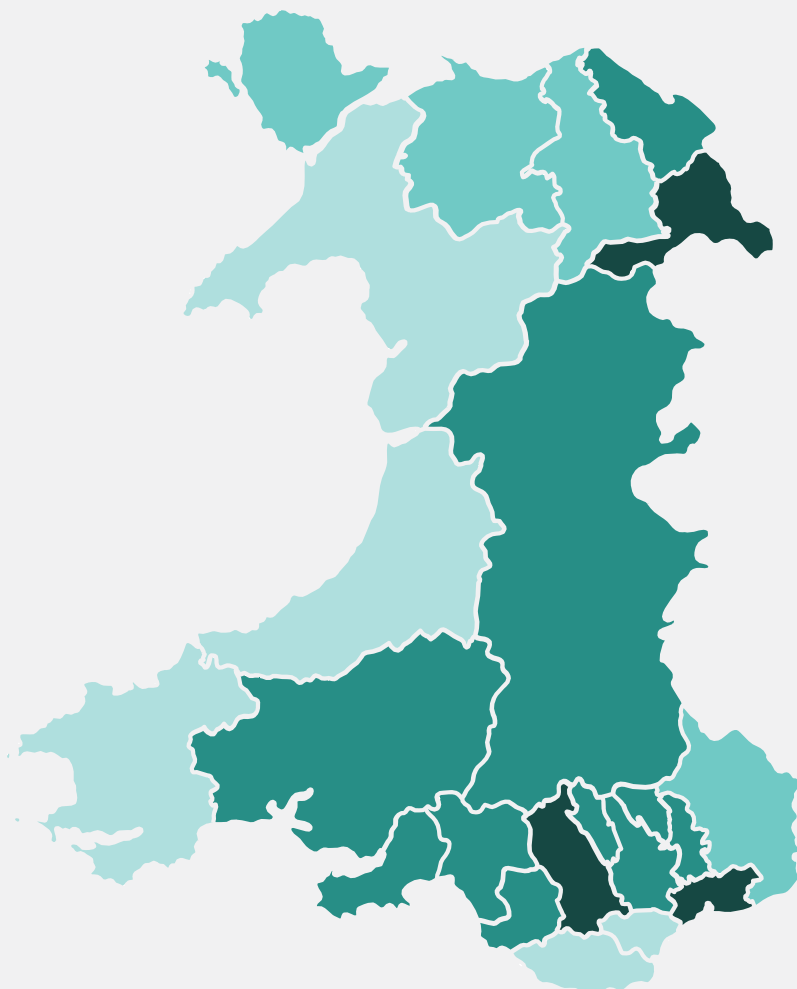
sport sector that takes decisive action to respond in advance to future demands, taking advantage of anticipated trends to transform, grow and develop sport and achieve the goals set out in the Vision for Sport in Wales and the Community Sport Strategy.

Generating views of the future

Future Foundation identify key consumer trends across the broad sweep of UK society and across multiple areas of consumer activity. These, clearly, relate not just to sport, and not just to Wales. Nevertheless, through a

No Frequent Activity

% of Welsh population participating in sports less than once a week



Source: Sport Wales Active Adults Survey 2012

combination of rigorous analysis and direct input from experts within various fields relating to sporting participation in Wales, we have produced a selection of trends and discussed how they apply to the future of sporting participation.

In addition, we have supplemented Future Foundation's existing database of consumer trends insight with a variety of additional perspectives, including focus groups and in depth interviews undertaken with consumers across Wales, interviews with a number of experts, workshops involving stakeholders from Sport Wales and

other NGOs from education, public health, community development, sport, leisure and, finally, extensive desk based research of published reports and data sources relating to sports participation, government policy and infrastructure building projects.

Different types of trends

The future is shaped by many inter-related factors moving at different speeds across different levels of society. Therefore it is vital to any analysis of the future that the speed and extent of the influence of a particular trend can be properly assessed. Future Foundation trends are broadly categorised into three types.

Contextual drivers: These are long term, deep rooted and certain. One example from the trends considered in this project is "*Digital Revolution*", which covers the rapid expansion of technology ownership and its progressive reach into all areas of consumers' lives.

Established trends: These are more recent and currently in the process of becoming mainstream over the coming years. An example included in our future proofing for this project is "*Perfection of the Body*". This trend discusses changing attitudes to body and body image in society.

Emerging trends: By definition these are newly identified but with sufficient interest and potential to warrant further investigation. The nature of evidence is more qualitative and speculative. A good example here is the trend towards "*The Death of Risk*", which captures the idea that society is becoming risk averse as risk becomes more visible and less tolerable, on a societal level.

Scenarios of the future

The scenarios presented in this document are not predictions of the future of sport in Wales, but a series of possible futures, each of which may be true. The process of scenario development is described in

more detail in the relevant section of this document but, in essence, involves the identification of two key dimensions that will shape the future of sport in Wales.

It is also true that all four of the scenarios could, to some degree, represent the future, with different scenarios perhaps being more relevant for specific sports in Wales, for different parts of the Welsh population and for different geographical areas within Wales.

The usefulness of scenarios lies not in prediction but in providing a framework within which to think about the future and enable Sport Wales to influence future policy. They also promote an atmosphere of forward-thinking, and enable organisations to prepare for the future and gear up for a number of alternative futures. Over time, as we move from 2014 towards 2026 and the world for which the scenarios have been created, which of the scenarios best represents the truth of that future will become clearer and efforts towards optimising sporting provision and participation within that set of conditions can be put into place.

Having said that, we do, within this report, identify which of the scenarios is currently deemed to be both most likely and most desirable.

The structure of the report

The aim of this report is to clearly set out anticipated changes to the social, economic, demographic, technological, competitive and regulatory landscape in 2026. There are two main sections:

1. Consumer trends affecting the future of sporting participation in Wales:

Here we summarise the key trends, both established and emerging, that will drive a changed relationship with sport. These have been grouped into seven broad themes.

2. Scenarios for future sporting participation in Wales:

Here we describe the critical uncertainties in the future environment, characterise four alternative future scenarios and briefly discuss what each might mean for the future of sport in Wales.

We have enriched the report with quotes from workshop participants, from the qualitative research and our expert interviews, and added illustrative data and product/service examples to help bring to the report to life. 



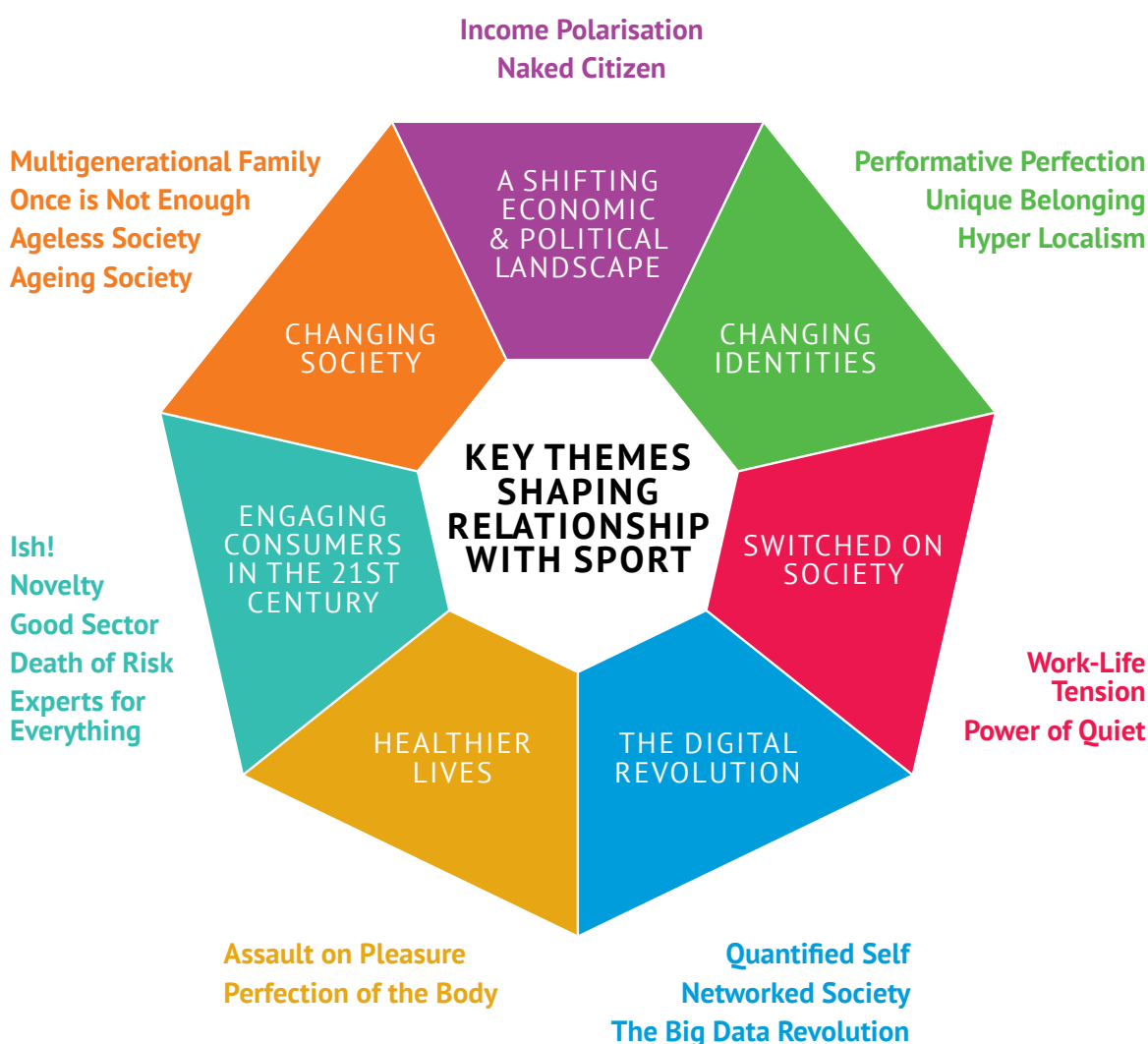
CONSUMER TRENDS AFFECTING THE FUTURE OF SPORTING PARTICIPATION IN WALES

The Welsh citizen of 2026 will share much with their counterpart of today but will also be noticeably different, as the forces of political, economic, environmental, social, and technological change encourage continued evolution of values, attitudes and behaviours.

However, the seeds of the future can be found in the present. As a preliminary to developing a framework of future sports participation, Future Foundation used a variety of research inputs to develop seven key consumer

themes that we believe will be crucial in shaping the nature of the future relationship between Welsh citizens and sporting activity and exercise.

This section introduces those seven themes in turn. For each, we describe firstly the key characteristics of the theme before highlighting key changes in attitudes and behaviour that we are already seeing within Wales, and which we expect to strengthen between now and 2026.



CHANGING SOCIETY

We expect demographic forces to re-shape the consumer landscape, propelling us towards a future where a re-evaluation of age and traditional life stages will have a profound effect on sporting behaviour in Wales.

Key Demographic Changes

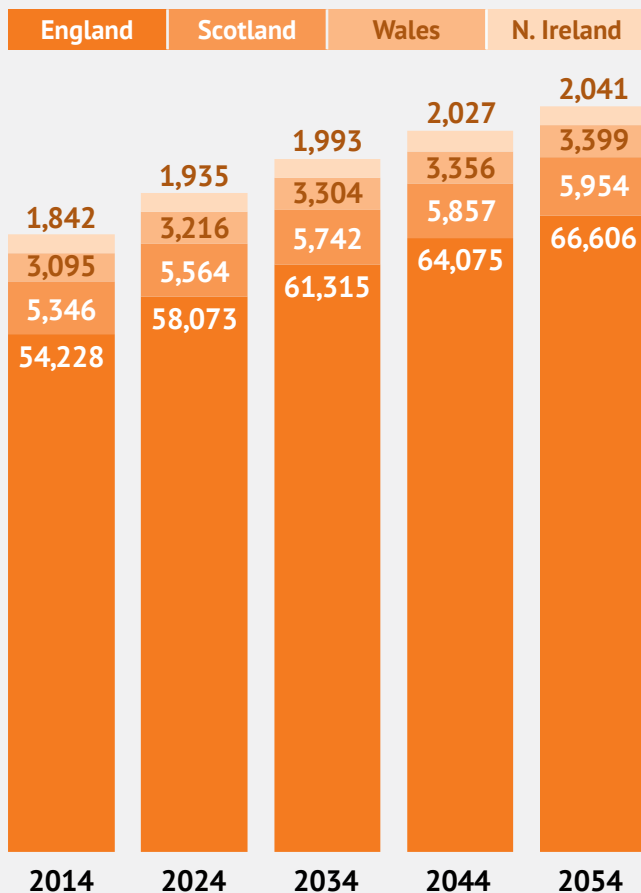
Welsh society is likely to witness significant changes over the coming decade. The overall size of the population will not shift dramatically, rising from barely over 3 million today to just over 3.2 million by 2026. Indeed, looking at longer term forecasts, it appears that the population of Wales is likely to remain relatively stable over the first half of the 21st century; in contrast to the more dramatic growth expected in England.

An Ageing Society

But within Welsh society we will see dramatic changes in terms of age. The Ageing Society has long been considered a core contextual driver that will have a transformative impact on all parts of the UK. In fact, there is no major EU economy where by 2026 the population of the over-50s will not rise (United Nations/nVision), meaning millions are now expecting to live longer and healthier lives. Also within Wales, as the chart below highlights, current data suggest that the Ageing Society will be most prevalent in Northern and Central regions of Wales. These facts produce anxiety within policy making. For example, how is the ageing population to be financially supported? How are healthcare systems to cope? How is the productive capacity of the economy to be sustained?

PROJECTED UK POPULATION, BY COUNTRY

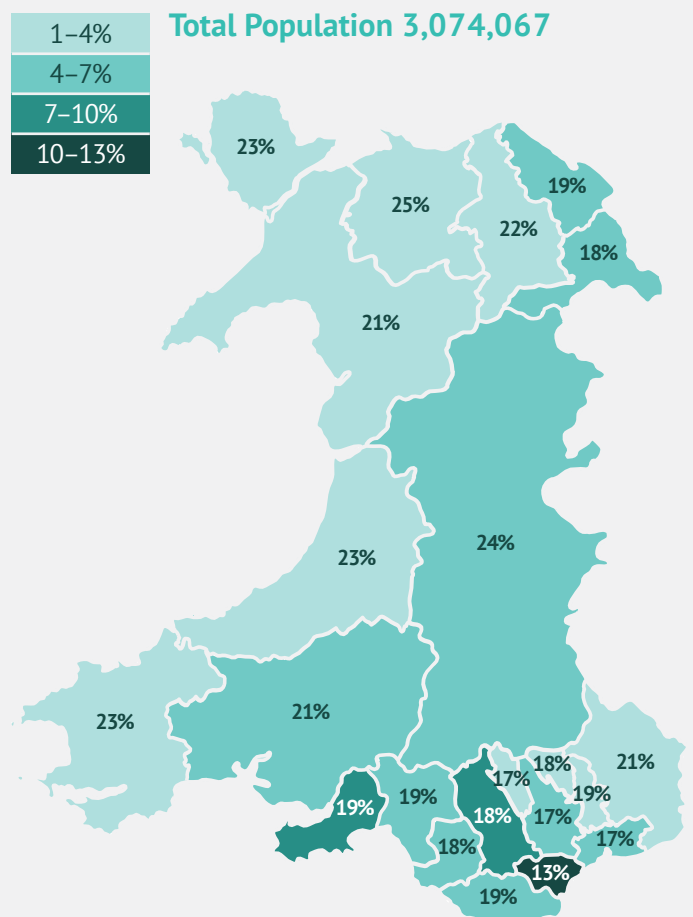
In thousands | 2013



Source: Population Projections, National Statistics/nVision, UK, 2013

POPULATION ESTIMATE

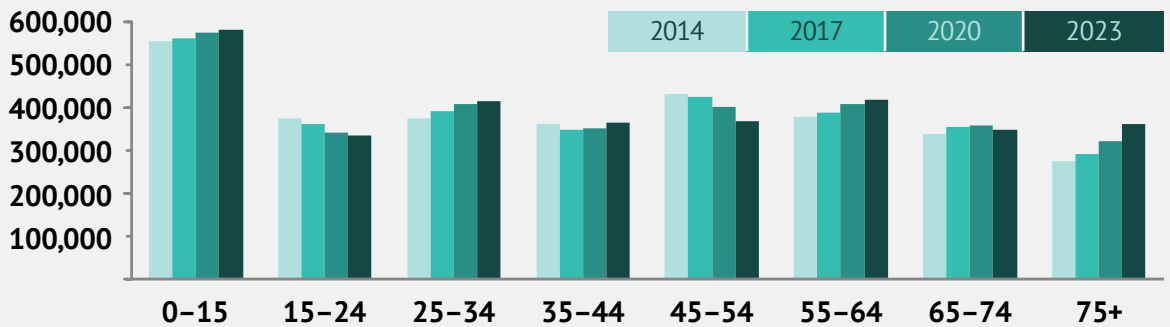
% of Welsh population 65+ by local authority, 2012



Source: StatsWales 2012

AGEING POPULATIONS

Projected Welsh populations at mid-years by age last birthday | ONS forecast, 2013



Source: Population Projections, National Statistics/nVision, UK, 2013

An Ageless Society

In addition to the to the Ageing Society, we are also seeing a shift in the very definition of age; a trend most often referred to as the Ageless Society. Here we note how evolving lifestyles and attitudes are challenging age-based assumptions and stimulating support for more age-inclusive services and communications.

Such changes in the consumer mindset are highlighted in the chart directly below. Not only do the majority of older age groups not see themselves as old, the number of people who hold this view is growing year-on-year.

And this movement towards a simultaneously ageing but also ageless society will have important consequences for

how Welsh consumers view, plan and live their lives. Most important will be the breakdown of the notion that traditional age boundaries are useful in anticipating consumer behaviour, attitudes or expectations.

The Lifestage Delay

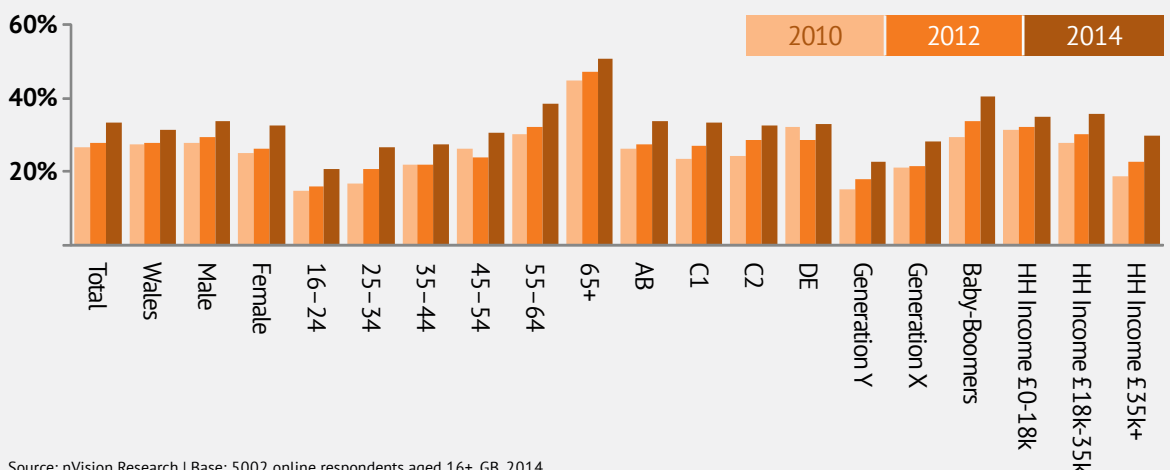
Moreover, we are seeing a fast emerging trend whereby Welsh citizens will expect to live far more fluid lives, where key milestones no longer happen just once, but often and in a much less linear fashion. A trend known as the Lifestage Delay that predicts the widespread realisation that no moment, no choice and no state of affairs are unique and irreversible. Therefore, we can expect older Welsh citizens to repeat, or seek out, new profound experiences much later in life.

From 2014 to 2030 the Welsh population aged 75+ will grow by over 50% to reach 428,000.

Speculation from demographers suggests that one-third of Welsh babies born in 2013 could live to the age of 100.

SELF-PERCEPTIONS OF AGE: THOSE WHO FEEL OLD

“On a scale from 1 to 10, how old would you say you feel, where 1 is very young and 10 is very old?”
% who respond 7-10 | 2014



Source: nVision Research | Base: 5002 online respondents aged 16+, GB, 2014

“ My mum now is 73 and she has never been able to swim but there was a window in Bangor where for an hour there was free swimming and I actually made her go, which was good, because for 73 years she has never swum before.

Female, 46+, Caernarfon

”

Once Is Not Enough

As a consequence of such social trends, we are also witnessing the emergence of a significant new trend, where people increasingly have the time, energy and finances to repeat the most significant and memorable moments of their lives. Not only do we expect lives to become more fragmented, with life-stages becoming less uniform, but life-stages themselves may be repeated; creating a complex route through life that decreasingly resembles the more traditional and linear life-stages seen previously.

The Multi-Generational Family

The Multigenerational Family (or “vertical family”) references the impact that increased longevity is exerting on family structures, with:

- a) units often now comprising multiple generations; and
- b) grandparents and even great grandparents becoming more visible within family life.

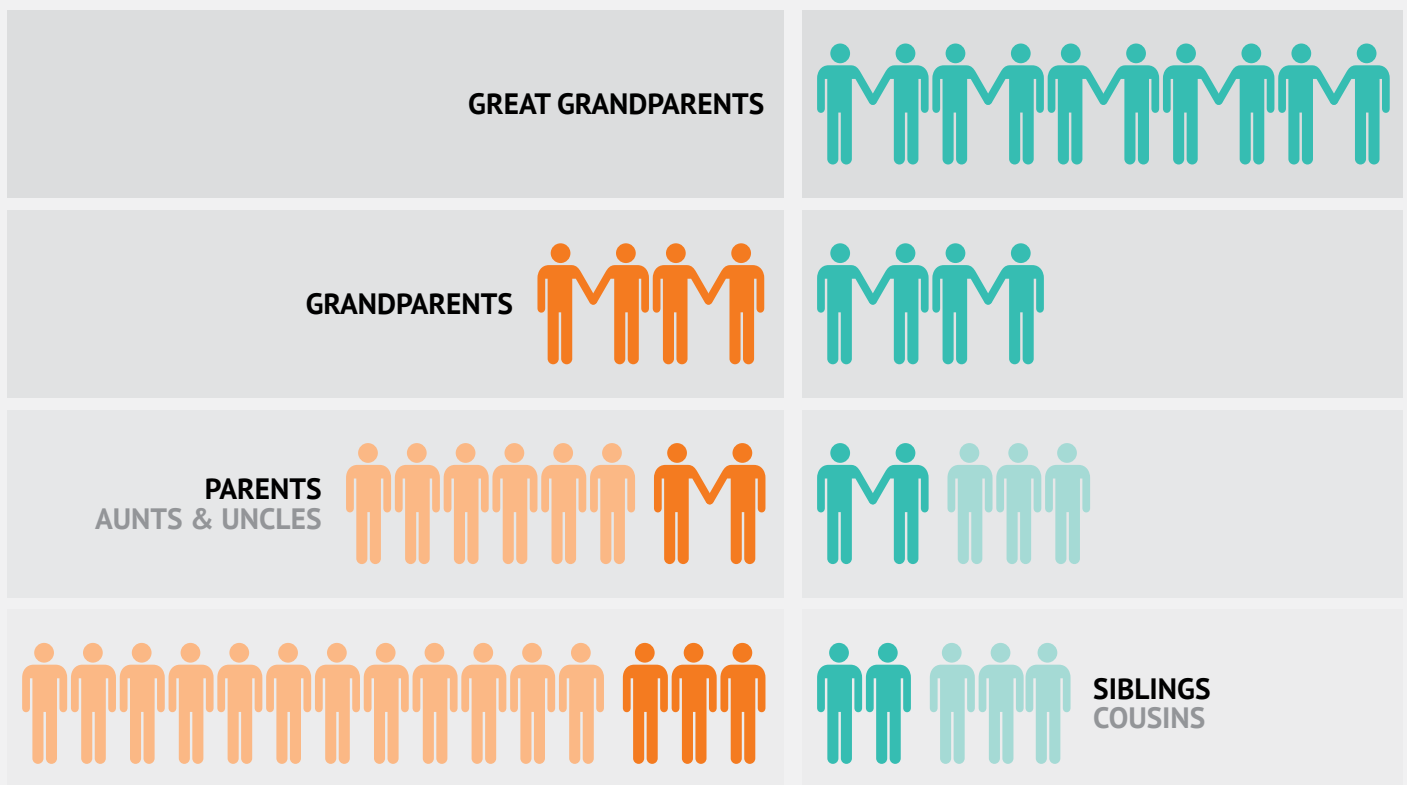
This is a trend being propelled further forward by modest birth rates, which interestingly have decreased the prominence of siblings, cousins, aunts and uncles within many families. Thus the structure of the family is more vertical and less horizontal than it has been in the past. Consequently, the Ageing Society is likely to enhance the role and influence of grandparents in family decisions, with important implications for combating inactivity at a household level. It should also be noted that, although not true in all instances, such changes to the family structure are likely to have more impact on women.

CHANGING FAMILY STRUCTURES

Multi-generational families and the growing role of grandparents

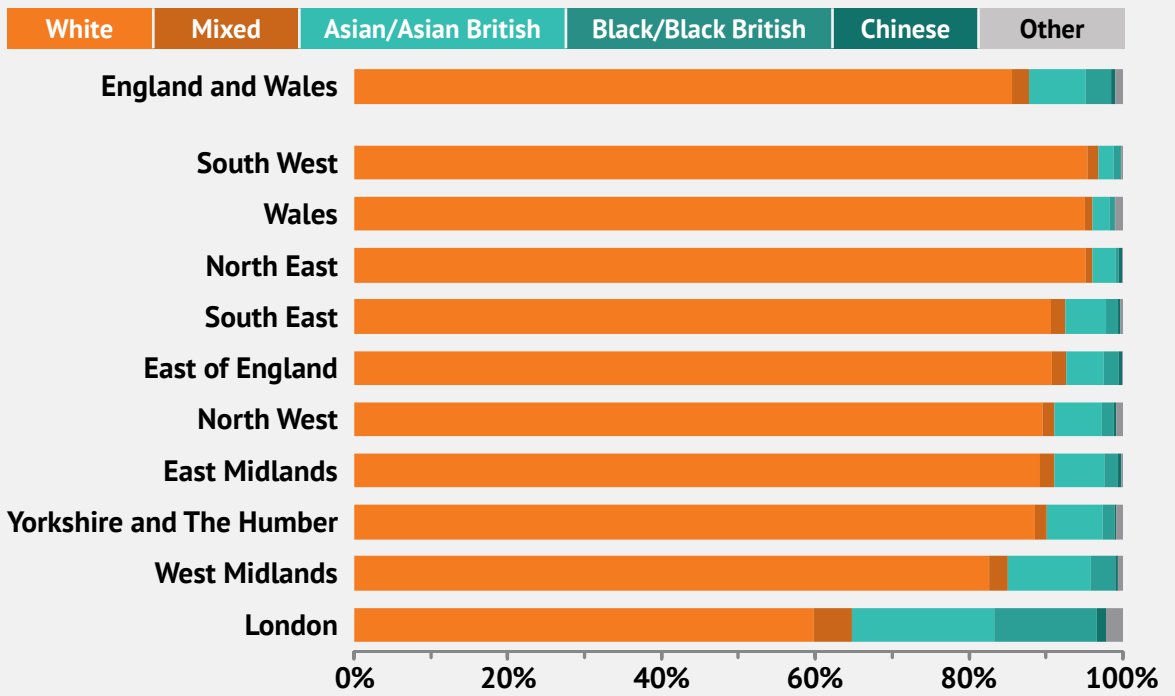
The traditional horizontal family

The modern vertical family



SELF-IDENTIFIED ETHNIC GROUP, BY REGION

“To which of these ethnic groups do you consider you belong?” | 2011 (published in 2013)



Source: Integrated Household Survey/UK Census/nVision, GB, 2011

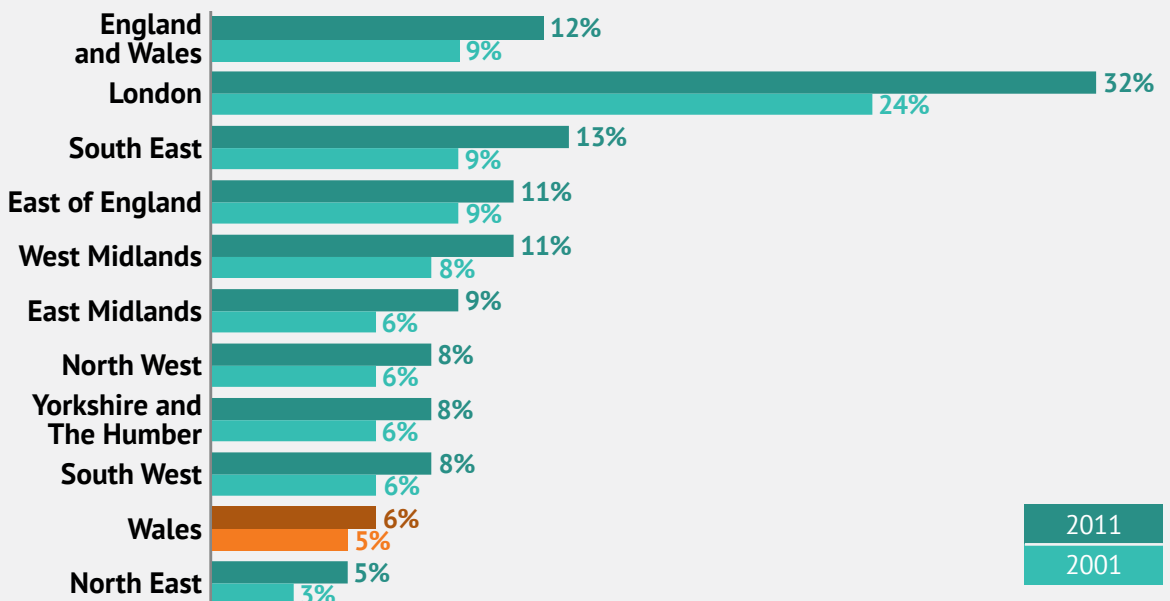
Ethnic Minority Representation: Overcoming a cultural disconnect

Looking at shifts in Welsh society overall, we find that the ethnic minority representation in Wales was 5% in 2011. This compares to 14.5% in the case of the whole of England and Wales. Within Wales, almost half of citizens from a non-white ethnic background

are Asian, while 0.6% of the Welsh population are Black.

According to the findings from the most recent UK census published in 2013, the number of households in Wales that contains two or more residents from multiple ethnic backgrounds has risen from 5% in 2001 to 6% in 2011; that's a total of 55,000 households. This is notably fewer than the average across England and Wales, which stands at 12%.

HOUSEHOLDS CONTAINING RESIDENTS FROM MULTIPLE ETHNIC GROUPS



Source: Integrated Household Survey/UK Census/nVision, GB, 2011

Consequently, although the proportion of ethnic minorities in Wales is notably less than in England, there remains a clear challenge for sport organisations to demonstrate that reflect the modern make up of Welsh society. Indeed, poor representation across all sporting bodies in Wales is likely to be a significant barrier to increasing sport participation among ethnic minorities. This is especially true in urban areas, such as Cardiff, where the proportion of people from diverse ethnic backgrounds is far higher. Indeed, figures from the latest UK Census show a significant variation in the proportion of ethnic

minorities across the regions of Wales. For example, while two-thirds of local authorities in Wales have an ethnic minority population of less than 5%, this number rises to almost 20% in Cardiff.

Under representation at all levels risks a dangerous disconnect between organisational bodies and ethnic communities. This in turn will limit the appreciation of cultural nuances, which will hinder the extent to which sport policies can be tailored to meet the specific requirements of different groups within society.

“ If you want to make a change towards an area such as more representation of ethnic minorities in ten years’ time, we need to make sure that the people who make decisions at the top level and boardroom levels, are able to relate to these groups and have experience of these groups and the experiences that they go through in life. ”

“ I think we need to look at making sure you reflect the communities you want to engage with and the local community you’re operating in is being reflected within your own organisation and structures. ”

Sunil Patel,
Show Racism the Red Card



IMPLICATIONS FOR THE FUTURE OF SPORT

- As Welsh citizens will be active for longer into old age, this will comprise a growing new target group to ensure continued sport engagement well beyond retirement age.
- As age boundaries offer less indication of behaviour, organisations will be expected to offer more flexible/age neutral communication and service options.
- With more people in Wales looking to re-visit events from their past, the power of nostalgia may be a potent tool in enticing people back into sport; appealing to activities enjoyed or missed from the past.
- The growing role of grandparents in family life will provide new demands and opportunities to develop sport services that cater to this shift in family dynamics.
- Although it is true that dropping out of sport at younger ages leads to people leaving certain sports behind for good, it is also clear that the momentum towards less linear lives will make continued and unbroken engagement with sport increasingly difficult. But at the same time, the Once Is Not Enough trend outlined above suggests that dropping out of sport at certain life-stages may not be the end game it once was and will be increasingly reversible.
- In addition, as part of the qualitative research we recognised that there was some preoccupation amongst young people with age and professionalism in sport, if you hadn't reached elite status by the time you reached adulthood then some felt that you might as well stop taking part in that sport. As a result, some effort should be made to neutralise this effect and remind consumers (particularly teens) that a particular sport does not need to be discarded just because you reach a certain age.
- Sporting needs and wants will become more defined by life-stage rather than age. Understanding the disrupting influence of each potential life-stage and then targeting citizens accordingly, will be a powerful tactic in reducing the drop-out rates at different stages.
- More research is undoubtedly needed to determine what actions can be taken to help overcome any cultural disconnect and boost engagement in sport among ethnic communities.



A SHIFTING ECONOMIC AND POLITICAL LANDSCAPE

An (unbalanced) economic recovery

As Wales begins to reach pre-recession economic levels, we can again start to view the future of the Welsh economy with cautious optimism. Indeed, short term indicators are very positive. Unemployment has fallen at a faster rate than in England, down from 8.4% in early 2013 to 6.6% at the start of 2014. Moreover, average annual earnings have risen from by £1,000 since 2010. The prospects for Welsh economic recovery may be in line with the rest of the UK, but we are still facing an unbalanced economic recovery; driven primarily by London and the South East.

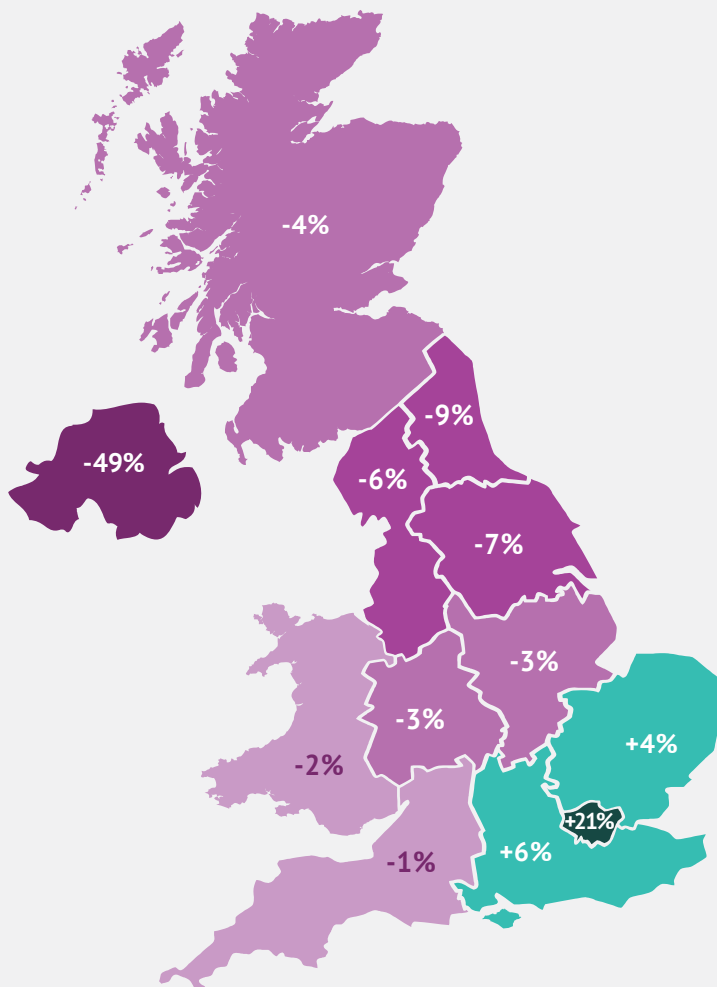
Despite concerns over an unbalanced recovery, the growth in earnings highlighted here suggests that Welsh society will be again enjoy rising affluence over the longer term. Such trends will have notable consequences for sport; empowering the majority to afford increased sporting activity, as well as unlocking new sports that may have previously been out of reach for financial reasons.

But concerns remain over rising inequality

Yet, as with all stories of growing affluence, one consequence is likely to be growing inequality. As the chart

AN UNBALANCED RECOVERY

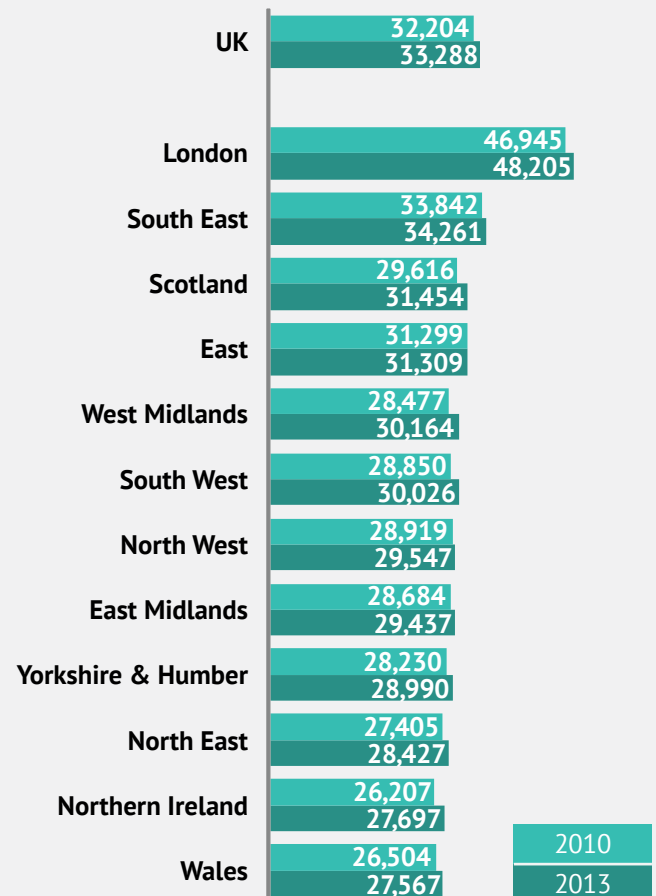
House prices vs. pre-crash, by region



Source: ONS/nVision

AVERAGE GROSS ANNUAL EARNINGS OF FULL TIME EMPLOYEES

Mean gross annual earnings, by region | 2013



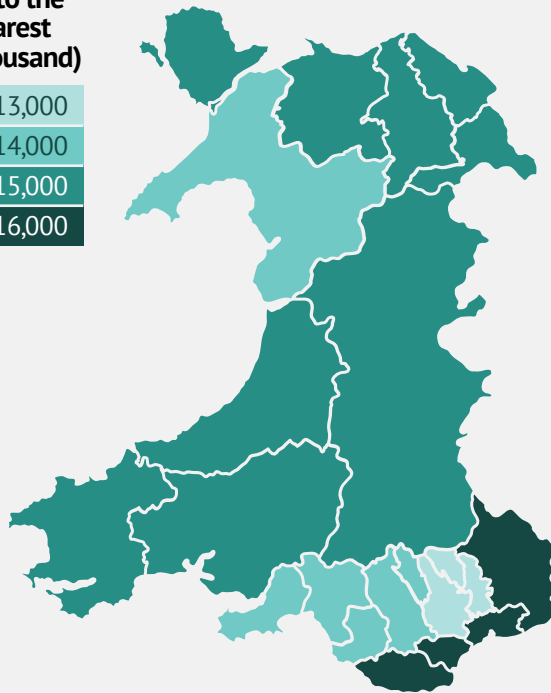
Source: Annual Survey of Hours and Earnings/National Statistics/nVision Base: UK, 2013

GROSS DISPOSABLE HOUSEHOLD INCOME

Per head by Welsh economic region | 2012

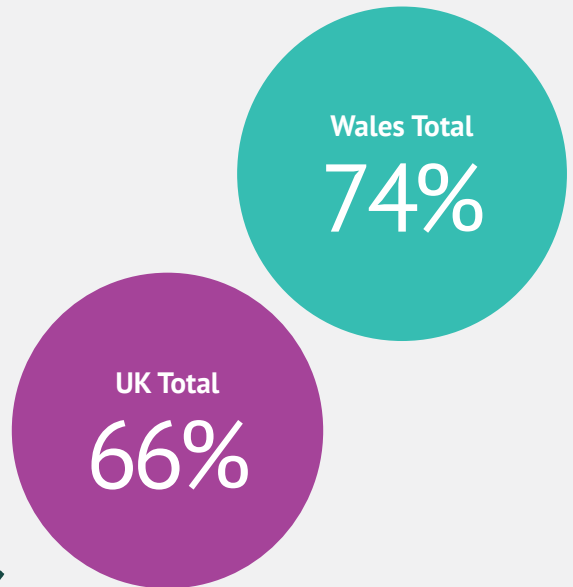
£ (to the nearest thousand)

£13,000
£14,000
£15,000
£16,000



INCOME POLARISATION

% who agree that “people today should be more angry about poverty in society”



below highlights, in 2012 there was already significant inequality between the regions of Wales. With the economic recovery expected to be driven by the top earners, we should expect to see such inequality becoming even starker over the short to medium term.

Such income disparity will create numerous challenges for sports participation in Wales, with the risk and rising disadvantages for those in lower income groups. The threat of

continued funding cuts for sport will also encourage this worrying trend.

In addition, new evidence from Sport Wales Active Adults Survey, heavily supports the view that social inequality will be the key barrier to sport engagement over the coming decade. Indeed, the survey shows that over half of people earning under £10,000 partake in no frequent sports activity, while this figure drops to 22% among those who earn £52,000 or more.

“ We know that the biggest determinant for equal outcomes is your socioeconomic class and actually in rural areas for young people, with the demise of public transport, with the kind of more isolation of communities, actually having the opportunity to participate in out of school activities is very, very limited.

My main concern about the public/private sector is that clearly, if we're not careful, it just will serve to increase the inequalities gap.

Adele Baumgardt,
Vice-Chair, Sport Wales

“ I think that there is an area in poorer communities where people are unemployed and they're poor and if you've got a fairly cheap leisure centre on the doorstep it doesn't necessarily follow that they would use it. I think that there's something else going on there which is about lack of motivation. So we still haven't cracked that one I think, really.

Christine Chapman,
A.M. Chair of Communities,
Equality and Local
Government Committees,
Welsh Assembly

The “New Normal”

Despite improvements in the economic outlook, it is important to note that the downturn has had a profound impact on the national psyche, resulting in new behaviours that will carry on well after the economic turbulence of recent years is over.

One key mindset that is here to stay is maximising behaviour, where Welsh people will continue to invest significant effort into optimising all of their commercial dealings. For example, in 2014, over two-thirds in Wales claimed to shop around extensively to get the best deals and to also carefully budget their personal finances. The maximising mindset is not only led by a desire for the cheapest deal, but rather the search for best overall commercial offer and outcome. Perhaps the clearest example of the growing demand for the best deal is the rapid increase in market share of ‘value’ supermarkets. Indeed, between March 2013 and 2014, Aldi and Lidl reported sales growth of 35% and 17% respectively. Sainsbury’s subsequent deal with Netto in June 2014, also indicates how established market players are having to respond to this continued value for money driven mindset.

Such echoes of the financial downturn will mean that, despite improving personal incomes, Welsh consumers will still be determined to find the very best deal for the sporting activities they wish to undertake.

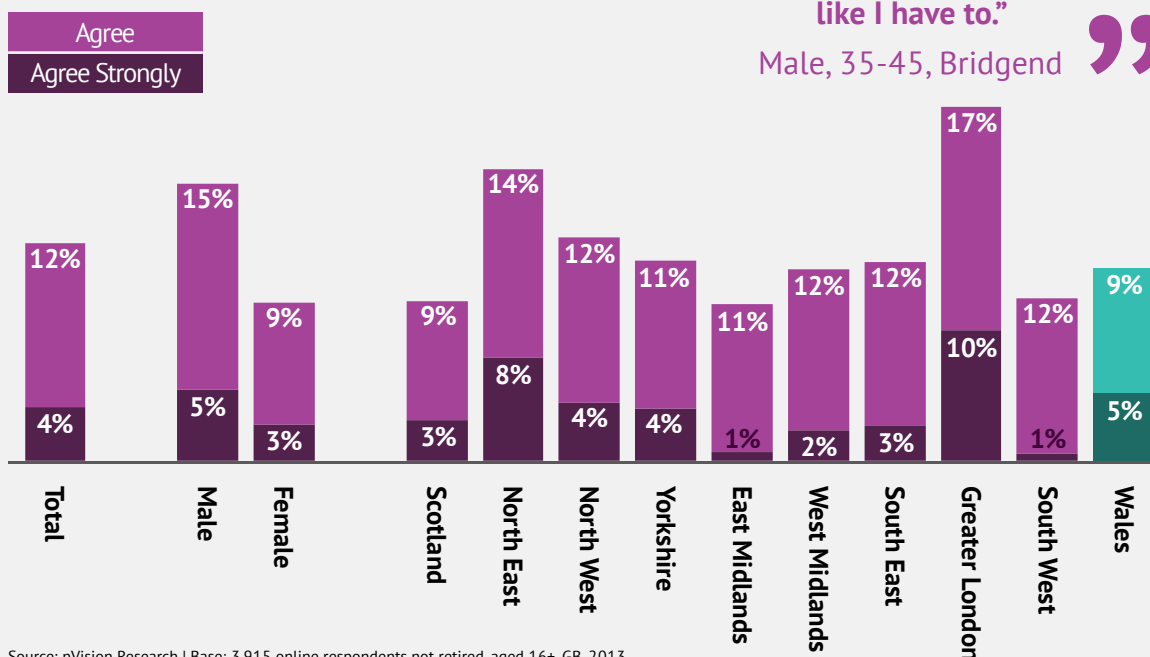
The Political Landscape: A shift in the social contract?

One further consequence of the economic downturn has been a subtle reevaluation of the State/Citizen relationship. Indeed, there is clearly a growing sense that the state may not be able to provide the kind of support expected in the past. While a growing sense of individual empowerment is also seeing the balance tilt towards a greater sense of individual responsibility, rather than top-down support. One example of this shift in attitude is the low number of people who expect the state to support them in later life. This shows slightly more expectation among younger and wealthier citizens, it still tells the overall story of majorities believing the state will have less of a role in their lives.

The growing sense of personal responsibility over state support is an important theme for the future of sport, which will be examined further in the Healthier Lives theme (see page 35).

THE NAKED CITIZEN

“I am confident that the state will financially support me when I reach retirement age”



“There’s not a lot that the government could do to encourage me to do more sport; I’ll do it as I feel like I have to.”

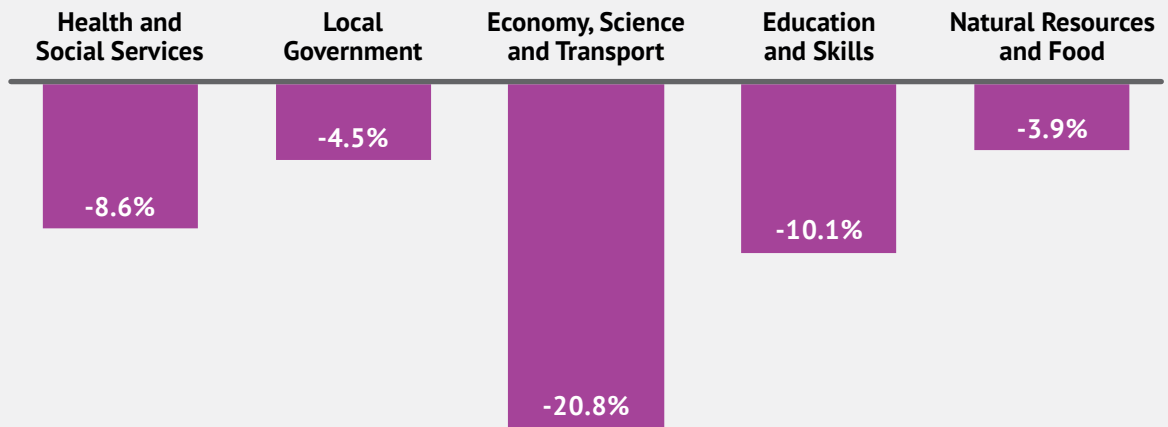
Male, 35-45, Bridgend

Source: nVision Research | Base: 3,915 online respondents not retired, aged 16+, GB, 2013

TOTAL DEPARTMENTAL EXPENDITURE, 2010-11 TO 2013-14

(current MEG structure, 2013-14 prices, £ millions)

% change (2010-11 to 2013-14)



Source: Institute for Fiscal Studies, Scenarios for the Welsh Government Budget 2013

The Political Landscape: Changing views on the welfare state

The changing relationship between citizen and state is demonstrated further by shifting views towards the benefit system and the welfare state. Research conducted by Ipsos/Demos in 2013 showed that just 24% of people in the UK supported increased benefits for the poor, while 49% disagreed. Similar levels of opinion were shown towards the notion that people on benefits will make a contribution back to society in the future.

At the same time, the level of public spending is set to decrease as the budget cuts get into full swing. As the chart below shows, government expenditure in the UK will decrease significantly from 2015 to 2018. Under such constraints, careful consideration will have to be given to where available resources are allocated to achieve optimal results.

Moreover, the combination of government spending cuts and growing disapproval of welfare spending means

that prioritising sport funding for the least privileged, highlighted here as a key action required to remove barriers to sport, will be a hard sell to the wider public. Making a strong, evidence supported, argument for such spending prioritisation will therefore be a key challenge for policy makers.

The Political Landscape: The Scottish Referendum

Regardless of the result in the 2014 Scottish referendum, all parties will recognise that Scotland enjoys a new status and strong sense of national identity. The key messages around devolution are strong and ones which the Welsh people cannot help but hear. We expect the aftershocks of the Scottish vote, whatever the result, to increase Welsh nationalism and increase calls for greater autonomy. Any change in the relationship between Westminster and the National Assembly for Wales will obviously have significant implications for the future of sport funding and policy in Wales.

“ Well if you look in Wales, the education and social services will be ring fenced, the money from the assembly government to the local authorities. Leisure services are not statutory so obviously they're going to be the first ones to go.

Christine Chapman, A.M. Chair of Communities, Equality and Local Government Committees, Welsh Assembly

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IMPLICATIONS FOR THE FUTURE OF SPORT

- Increased affluence will empower Welsh citizens to enjoy new sporting opportunities and will be an important contextual trend that will help promote greater participation in sport, though there will continue to be subsets of society that are excluded from sporting opportunities by lack of finances.
- However, the maximising mindset will endure, meaning that sporting opportunities must be able to offer clear value for money.
- Social inequality will be the biggest barrier to sports participation and must be viewed as a priority policy area.
- Sporting initiatives will have to focus more resources on targeting those groups of society who are likely to be left behind due to rising inequality.
- Reduced public resources will also have to be concentrated on targeting the least well off. Indeed, policies that prioritise supporting those who are inactive through no fault of their own, will instil a sense of fairness.
- A growing sense of personal responsibility may require a new approach from sporting bodies, moving away from directing behaviour and towards assisting individuals in designing their own active regime.



CHANGING IDENTITIES

At a broad level, our identity is influenced and framed by a multitude of different demographic and experiential factors, which shape our interests and preferences throughout our lives. Further, we see consumers growing more and more aware of how they portray their personality to their peers and the wider world, and the range of platforms they use in order to achieve this only grows in complexity.

Performative Perfection

Driven in part by the Digital Revolution and the extent to which we perfect and share our lives online, our social media sharing culture is no longer confined to the online world. Our whole reality is becoming more visual, social and recognition-fuelled and increasingly, we openly strive to portray a perfect self at all times both on and offline. As we deal with these new pressures, ideas such as online image management and social media identity consultancy come to the fore.

Unique Belonging

Society has long attached importance to individualism, however, the value placed on this quality is evolving. Although we like to feel that we are all unique individuals, in reality, truly standing out from the crowd is something that many find intimidating and want to avoid. Instead, we want to be different but not too different.

Our recreational habits make up a huge part of this, and sporting activity, whether as a spectator or participant, is a key

example. Whilst we enjoy these activities, they also provide significant sharing opportunities that many use to embellish and strengthen their sense of identity. At the same time, confidence, ability and our perception of self play a core role.

This idea was clearly reflected as part of our qualitative analysis where two key components were established. On the one hand, tailored sporting provision gave our participants the feeling that their needs were being understood on an individual level (positively impacting on value of the activity), rather than as a broad demographic group or locality, as seen as part of *Changing Society*. However, in tandem with this was importance of these activities being carried out on a mass scale, helping to ease feelings of self-consciousness in a safe environment. Our participants claimed that this feeling of being 'heard', but not pinpointed, was more likely to entice them into increased sporting participation.

Simultaneously, it became clear that certain activities could often be in danger of stereotyping certain groups of people; for example, some older participants mentioned that they didn't appreciate it when provision assumed that they would be unable to take part in certain activities due to their age, when actually they would have enjoyed the chance to see what they were capable of. Clearly, a very sensitive and thought-through approach is important here, to ensure that this complex balance is achieved.

44%
of people in Wales feel a strong or moderate need to be that just that bit different from others in the way they express themselves

“ It would be very hard to go out and find something for our age group... nothing for that age bracket in between... [promotions] once you hit 25, there's a massive 35 year gap where there's absolutely nothing.

Female, 46+, Caernarfon

“ I've been at work all day, and I don't want to leave the children again, you have to have time as a family. So if I want to do something, I want to do it after the children have gone to bed. And there's nothing much on at 8pm in the evening.

Female, 25-34, Aberystwyth

“ A lot of people would like group activities which is are not threatening, so those sort of group activities; whether it's dancing, or Zumba... I think that's a good move really, that sport is not just about being competitive – it would be for some people, but not for others. So I think that it really depends on the person.

Christine Chapman, A.M. Chair of Communities, Equality and Local Government Committees, Welsh Assembly

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Evidently, a wider facet of this theme is confidence in sport and physical activity. As part of the research, we recognised that for those who had low levels of self-assurance, it was far less embarrassing to follow than lead. For example, to be actively encouraged to join an organised sporting group that was specific to your needs was a safe platform to participation, rather than take personal initiative to join an activity that might not be suitable in some way. In sum, with less chance of disappointment and potential embarrassment, our participants considered themselves more likely to try something new. To some extent, this ties into another theme we reference later called *Death of Risk*.

Hyper Localism

Locale is another important facet to our identity make-up. Specifically, the extent to which identifying with a local area can positively affect levels of participation. This includes identifying with a community in its broadest sense, e.g. simply supporting a local team or local facilities, but also community involvement and a proactive commitment to the local area such as volunteering. Importantly, there has already been some positive movement here – the Sport Wales Active Adults Survey illustrates that volunteering in local sport actually increased from 5% in 2008 to 10% in 2012, although the average amount of time spent volunteering has decreased. Looking ahead, Sport Wales (via their Coaching and Volunteering Strategy) are aiming to further double volunteering figures by 2016.

It is important to bear in mind, however, that this sense of 'local' can trickle down into various spheres of influence: from national, to regional, to county and perhaps most powerfully, to community level. In fact, we would argue that it is the Hyper Local that drives our identity in its most concentrated sense. Community and local involvement is a direct response to both the growing sense of alienation and isolation that some feel as the world globalised and connections become more virtual, and the profound affect that the downturn has had on our economic mindset, as explored earlier in the report.

In 2013, 85% of UK consumers agree that they will continue to be careful with their money even after the recession is over.

With this in mind, one could conceive a situation where a lack of investment leads to the centralisation of services in some areas, leading to a feeling of alienation for and negatively implicating consumers' finances and sense of identity. In addition, the likely creation of city regions across Wales could have the potential to diminish this theme of hyper-localism, as identities are extended and softened as a

result. On the other hand, we see this as more of a long-term trend as continued growth in social media news sharing platforms and the rise of connected online communities will work to counter this to a certain extent.

While it is likely that only a minority will ever want to become very active in their local community, these people will be a crucial resource for both volunteering but also act as local advocates, role models and experts.

More, our qualitative participants consistently mentioned that broad-

“

That's why the Commonwealth Games are nice, because we're, like, Welsh there, aren't we?

Male, 25-34, Aberystwyth

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“ Obviously role models are important... [but] it would depend on who you were because obviously certain groups of people would be really inspired by sort of professional athletes, rugby players; it depends, it would really depend... I mean a lot of people would see a professional sports person as so far removed from their own experience that they wouldn't even think about them, they would completely switch off, so I think that you would need to have somebody a bit closer to them.

Christine Chapman, A.M.
Chair of Communities, Equality and Local Government Committees,
Welsh Assembly

“ I think the Olympics were good for us in the countryside in general. It got people off the sofa to take part in things, because at the time, when the Olympics was on, I felt quite motivated to go out running or something. But now that it's over, you forget about it and then go back to your normal life.

Female, 25-34, Aberystwyth

level sporting events often did not have the same sense of long-term inspiration that a local event could have. Whilst global events such as the Olympics were considered to be inspiring in the short-term, there was a sense of unattainability.

Although products and services sit at the heart of this aspiration for all things locally produced and home-grown, locally cultivated sporting figures and heroes, their personal accomplishments and their role in the

39%
of Welsh consumers strongly or moderately feel the need “to be involved in the life of the neighbourhood or community”

local community also play a considerable part in making people feel a connection with their direct environment.

Our qualitative research demonstrated the importance a sense of community can play in terms of inspiring others when it is cemented and acknowledged by a key event or individual in your local area

that makes it feel somehow applicable to you personally.

“ Going back to the Tour of Britain... when people were interviewing Dave Brailsford... he was speaking to them in Welsh and I think that was nice because you thought “oh, he's still part of the community”... I think it does inspire people... everybody came together as something to look forward to and everybody was talking about it.

Female, 46+, Caernarfon

ADIDAS

In the run up to the London 2012 Olympics, official sponsor Adidas released a series of posters across the capital showcasing young individuals it had chosen as the “Pride” of their respective boroughs.

The campaign saw 32 different posters designed to highlight promising young athletes and creatives, with each being displayed in the individual's local area and describing them as the “Pride of xxx”. Fencer Curtis Miller, for example, was named as the “Pride of Islington”.



“ Well I think it's friends, family and community. I think it's quite interesting because we do push quite hard on positive role models but certainly. My experience is that if you give people role models who are too far away from your personal experience and position, particularly for women, they are likely to be put off, not engaged.

Adele Baumgardt, Vice-Chair, Sport Wales

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Another significant and grounded derivative of this idea of 'local', is the appeal of the past. Nostalgia represents a potent marketing tool – one through which an emotional connection with certain groups of consumers can be leveraged through feelings of warmth and familiarity, bringing with it a sense of pride and heritage. We would argue that the preservation of local nuances is a core element to this continued sense of identity – particularly for older consumers.

73%
of Welsh consumers agree strongly/agree that “every effort should be made to prevent the disappearance of regional and local differences in, say, food and dialects”



IMPLICATIONS FOR THE FUTURE OF SPORT

- There will be a need to continue to increase facilitation that meets the desire people have to share their sporting activities online over the coming years.
- Sport should look for opportunities to offer a sense of “unique belonging”, giving participants scope to feel personally understood, while also benefiting from the social nature of communal participation within safe parameters.
- There will be continued consumer receptivity to what feels familiar/ established, at least in the short-term offering opportunities to capitalise on nostalgia and Welsh sporting heritage.
- Sports must recognise the importance and obtainable nature of the ‘hyper-local’ over national or regional, in particular that offers community level role models and events that are paramount to inspiring young people to engage or re-engage with sport.
- Yet providers must tread carefully: sensible and relevant opportunities for Welsh consumers to feel proud about their achievements will be well-received, either personal or as a spectator – however, any sense that it is being shoehorned into their lives will not be welcome.



SWITCHED ON SOCIETY

The ever expanding need to balance the various and often competing spheres of their lives (work, home life, leisure time, social occasions) is causing Welsh consumers to experience various tensions and seek solutions which help them to maximise their time use.

Many strive for an optimum balance, satisfying demands in all areas without (too great) a sense of compromise. Along the way, efficiencies which enable people to manage their time more effectively or juggle responsibilities more expertly earn considerable support. Conversely, our disappointment threshold is diminished: for the time-pressured, the unsatisfying leisure moment or sports event simply cannot be tolerated.

Work-Life Tension

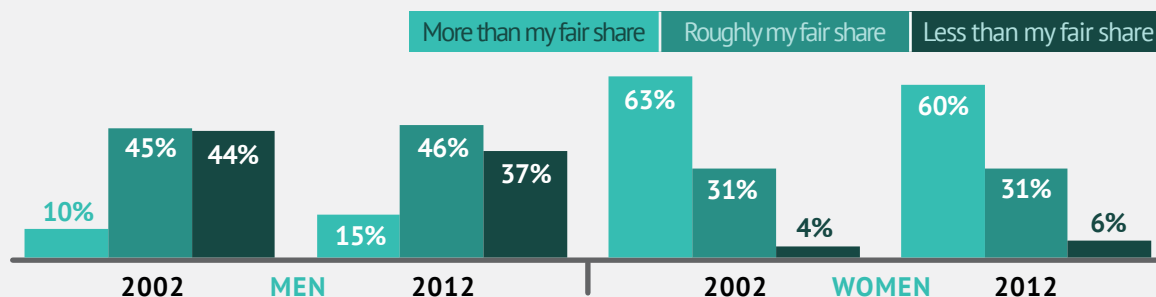
This modern phenomenon, a trend known as Work-Life Tension, appears to be particularly prevalent among Welsh society. Indeed, 85% state that they are under pressure in their everyday life, while two-thirds claim to feel stressed most of time. What's more, almost 70% believe that the stresses of modern life mean that people are less happy than they used to be.

Clearly, this is a trend which touches some demographic segments more than others and, while it is the young who often report the greatest levels of (self-perceived) time pressure, it is for those in the family formation stage where managing a wide range of roles and responsibilities may become most

FAIR DIVISION OF HOUSEHOLD WORK?

6 in 10 women say they do "more than their fair share"

"Which of the following best applies to the sharing of household work between you and your spouse/partner?" | % who selected each option | UK, 2012 data, published in 2013



Source: NatCen British Social Attitudes Survey/nVision | Base: 950 face-to-face respondents per country aged 18+, 2012

“ Your time is constantly diminishing and so it becomes that little bit more valuable and I think that for me certainly sport was the first thing to fall to the wayside as I moved from sixth form and university in to the real world, as it were.

Male, 18-24,
Cardiff

“ I think that it's about time poor as well, if parents are tired, they're worried about their jobs – it all sort of eats in to time that they may have with their children or with their own wellbeing I think. I think that that is a real problem which needs to be looked at... [Also] I think that particularly with the women, there is still a huge amount of inequality in the home so, for example, even if two parents, once the child comes along it probably tends to be the woman who would drop off with her physical activity and maybe the man may continue, you know; that's just the way that things are, unfortunately.

Christine Chapman, A.M. Chair of
Communities, Equality and Local
Government Committees, Welsh Assembly

“

Sometimes it's about people being time poor as well, tired from working hard all day. The last thing they think they need to do is to get out and be active. It's not just about being financially disadvantaged, although that is important it's also about time disadvantage and those other things as well.

Su Mably, Consultant for Public Health Wales

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challenging. While the story is relevant to both genders, Future Foundation research consistently reveals that women still perform a greater share of domestic chores and childcare and so may feel its effects the most forcefully.

The Power of Quiet


The time pressured environment that the majority of consumers find themselves in, combined with the digital bombardment that prevents people from ever fully switching off, has led to an emerging trend whereby consumers

seek moments of quiet; tranquil havens where they can fully remove themselves from the stresses of modern life.

In Wales we find the desire for such moments on the rise. For example, in 2013 62% claimed that they sometimes feel the need to get away from phone calls, emails and text messages and switch off. This is up from just 49% in 2011. And such trends will clearly offer new opportunities for sporting activities to position themselves as such occasions and appeal to the growing desire to find moments of escape.



IMPLICATIONS FOR THE FUTURE OF SPORT

- Opportunities for sport will have to respond to the far more fluid and flexible lives that Welsh consumers will be living. This will mean providing facilities/services at non-traditional times and for durations that suit ever increasing busy lifestyles. Indeed, we note that more individual and flexible sporting options show consistent growth. For example, membership of Swimming and Cycling clubs has almost doubled in Wales between 2008-2012 (Active Adults Survey).
- As outlined below, technological advances will enable greater flexibility through the rise of the Networked Society, allowing people to connect with new contacts in order to play sport on an ad-hoc basis.
- With Welsh citizens turning their hand to more types of activities, sports providers will face a more competitive market as people can turn from one sport to another quite easily.
- The perception of formal sport as organised on the premise that you can 'take it or leave it' in regards to the offer needs to change. Consumers are now so focused on value, that sport can no longer be seen to operate in a different competitive market to all other service providers. A fundamental shift in the mindset of sports providers is therefore needed to adapt to the challenges of the modern consumer landscape.
- The rise of the Multi-Generational family suggests that developing more joined-up sporting offers for children, parents and grandparents will prove successful in overcoming some of the barriers of the pressures of modern lives.
- Sports participation can also be encouraged by positioning/modifying activities into opportunities to relax and escape the pressure of their working/digital lives. 



THE DIGITAL REVOLUTION

To appreciate fully just how dramatically the world has been changed by the internet, we need only revisit the turn of the millennium – when a) about 30% of the UK population had domestic internet access (mostly through slow dial-up connections), and b) less than 10% of people went online more than once a week and c) the names Google, Facebook and Twitter had yet to enter our everyday vernacular.

As we write, 70% of people Wales use the internet several times a day, while smartphone ownership has almost reached the same number. Even more striking, 25% use the mobile internet every day and over 20% access the online world via their tablet daily. Moreover, almost half in Wales now check their social media sites every day; 10% even regularly check their Twitter account while in bed. Simply put, the sheer volume of digital activity and energy is overwhelming.

Such transformations have had an obvious empowering, but also disruptive impact on how Welsh consumers govern their lives. Indeed, there are multiple ways in which the Digital Revolution impacts considerations over the future of sport.

The Networked Society

As Welsh society grows more connected by the day, so the avenues through which advice, (re)views and expertise can be instantly disseminated continue to proliferate. In turn, the majority can harness a wealth of digital expertise to inform every sporting and lifestyle choice.

In addition, the rise of the Networked Society has allowed previously local and individual sports to become truly global in reach. New apps, websites and devices are enabling all consumers to connect with like-minded people around the globe, building clusters of sporting communities with no boundaries.

The Quantified Self

Beyond the impact of social media, the Digital Revolution has also led to an explosion in new apps and devices that allow consumers to monitor and streamline all of their sporting efforts; a trend known as the Quantified Self. Smart technology is unquestionably empowering consumers to collect and interpret real-time information about ever more aspects of their daily lives, which in turn allows us to find new efficiencies, reduce spend, adopt a more professional approach to lifestyle management and even sport.

NIKE SB

Launched on the iOS platform in November 2013, Nike SB is an app inviting skateboarders to complete challenges and upload videos of themselves in action. The app intends to transform the traditionally local pursuit into a globally networked activity.

The app's users can learn tricks by watching videos of famous pro skaters; they are then able to record themselves attempting the manoeuvres and upload ten second videos inside the app.

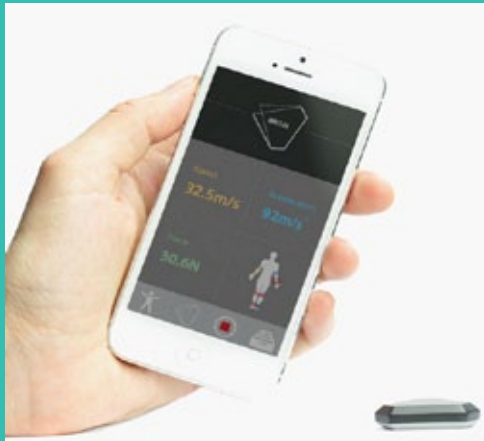
By accepting challenges, users can also earn badges, which can then be shared on Facebook or Twitter. The head-to-head game of S.K.A.T.E within the app pits skaters across the world against one another in the competitive performance of various tricks.



NOTCH

Notch is a wearable technology designed to collect and analyse data on the user's movements.

By wearing individual modules – relatively small and lightweight devices that can be embedded in specially designed apparel or attached to existing clothing – users can accurately monitor their movements and analyse the combined results via an accompanying app running on a paired smartphone.



Users can also wear an accompanying haptic wristband that vibrates to give real-time feedback on physical activity – for instance, vibrating when the wearer's posture is sub-optimal or congratulating a perfect kick on the football field.

Notch was exhibited at the Consumer Electronics Show (CES) 2014 and was attracting investment via the crowd-funding website Kickstarter in January 2014.

“

If I do go out for a run, I want to know what I've done, because it makes me feel better knowing how far I've been and how many calories I've burnt... that device is there to try and push you further really isn't it, a bit faster.

Female, 25-34, Aberystwyth

”

Yet, while there is evidence that this trend is starting to grow in Wales, it is notable that such a widely discussed trend has translated into limited behavioural change at a consumer level.

For example, when you look at the number of people in Wales who use calorie tracking apps you find that, although the number of users has doubled since 2010, only 7% of people use these devices today. Something, it

seems, must be applying the handbrake to the advancement of this trend.

At present, evidence suggests that the main obstacle is the overall utility of these devices – how much they can truly claim to offer personal insights on a level that allows consumers to significantly alter our behaviour for the better.

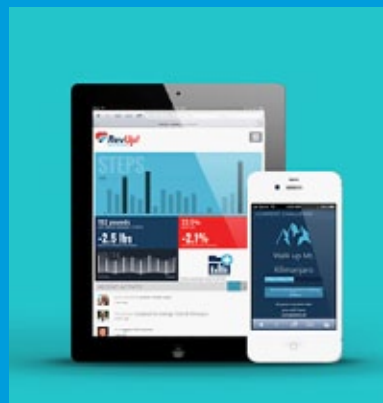
However, we are beginning to see the emergence of new devices and platforms that use more joined-up data

REVUP!

Unveiled at CES 2014, RevUp is a platform from MD Revolution which helps users make sense of their health data.

The system compiles information from lab results to genetic tests in order to deliver tailored health plans for users to achieve whatever health goals they set themselves. The tool can be synced with other apps or tracking tools such as diet trackers, pedometers and sleep monitors. The tool also uses predictive intelligence to suggest preventative health measures.

A points system gamifies the experience to keep users engaged. The system is available as a web and mobile app.





collection, across a range of different areas, to offer far more predictive guidance. Devices that can forecast consumer behaviour on a level that allows them offer holistic advice on how they can improve their lives – not only today, but also in the weeks, months and years ahead (a trend we refer to as Probability Gets Personal).

It is the emergence of such devices that provides a convincing model for how The Quantified Self is likely to develop and such advances are likely to result in a rapid expansion in the use of these devices throughout Wales. Indeed, the rise of these smart devices will mark one of the most substantial influences of the Digital Revolution on the future of sport in Wales.

The Big Data Revolution

One consequence of the digital era and the rise of smart devices, is an ever growing avalanche of consumer data on all areas of our lives, from our weekly supermarket shop to our latest gym performance. And the result is a new wealth of behavioural data that in many ways surpasses the kind of insights obtainable by traditional research methods. For organisations trying to understand individual behaviour (and influence it), harnessing this gold mine of public insight will become paramount.




Organizations must... remould their decision-making culture so that senior executives make more judgments based on clear data insights rather than intuition.

World Economic Forum 2014



IMPLICATIONS FOR THE FUTURE OF SPORT

- Ever more social media channels and the all-connected world that will become the norm by 2026, will change the way in which people view and enjoy sporting activities. Tapping into this trend will be crucial in promoting sporting activity.
- The use of quantified sporting apps will become increasingly popular and the predictive capabilities of these devices will be influential in promoting and keeping people in sport.
- The collection and analysis of the wealth of data generated from such trends must form a focal part of future insight strategies for sporting bodies. Indeed, the behavioural data collected from these devices (i.e. actual sporting activity rather than reported) will provide more real-time, accurate and actionable intelligence compared the insights that can be gained through traditional market research techniques.
- Like social inequality, and directly related to it, we can also expect to see an emerging division in the digital literacy and capabilities among different segments of Welsh society; exacerbated by differing access to the latest devices and systems. Such divisions must be considered in any wider policy on tacking social inequality, as limited access to new technologies will also hamper future access to sport. 



HEALTHIER LIVES

At a macro level, the consumer commitment to health and wellbeing has been growing over the past 15-20 years. Galvanised by the Digital Revolution – we have seen an increasing consumer awareness of personal health, as anxiety (and increasing knowledge) about the harmful implications of unhealthy living has amplified. As a result, many have felt compelled towards the adoption of a healthier and more moderate lifestyle; however, the characteristics of this acceptance have changed over time. If the 00's can be identified by Government initiatives such as 'Change 4 Life' and a growing social norm for healthy living, then the 10's have demonstrated the importance of personal responsibility as the 'new normal' – as an instrument of personal success and cultural heroism.

The Assault on Pleasure

There is hardly any aspect of today's UK consumption that does not attract some form of moral or political

debate. Our everyday pleasures have become increasingly prone to scrutiny, restrictions and regulation. Assuming that obesity rates and other health issues associated with unhealthy eating/drinking continue to rise, plenty of forces, political and regulatory, will continue to look for new mechanisms to inhibit excess over the coming years, as they have done already.

Rates of obesity have grown dramatically in low and middle-income countries – a result of changing diets and more sedentary lifestyles as populations urbanise. According to figures compiled for the National Assembly for Wales, rates of childhood obesity in the country specifically are the highest in the UK: around 36% of under 16s were classified overweight or obese in 2010 and between 2008-2012, children 2-15 years classed as obese rose to 19% from 16%. According to the Government Office for Science, up to 40% of the UK population could be classified as obese by 2026 if current trends continue.

REGULATION TIMELINE



“ If you look at our kind of obesity statistics, our general health and wellbeing statistics in terms of long-term life limiting conditions across the population in Wales, then we don't fare well compared to the rest of the UK and compared to Europe. **”**

Adele Baumgardt, Vice-Chair, Sport Wales

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Society of Sobriety and Controlled Living

In response to this 'nanny state' approach, yet driven by a growing belief that certain behaviours are socially unacceptable, we expect that consumers will increasingly prefer to moderate their own activities and lifestyles. We posit that over the coming decade, many of us will voluntarily embrace self-discipline and exercise purposeful moderation – over what we eat/drink, during moments of fun and escape; largely, in the overall micro-management of our lives. In the future, no-one will be admired who overdoses on unhealthy 'known knows'.

Mobile innovations and self-tracking technologies will further empower consumers to moderate their living through the collection and interpretation real-time information about ever more aspects of their health,

thus improving their lifestyle as a result of bespoke advice and sporting programmes.

However, we must bear in mind the rate at which consumer behaviour shifts from reactive to proactive may still take some time to reach a consistent and ingrained status.

43%
of Welsh consumers agree (and 17% agree strongly) that they have consciously made an effort to reduce the amount of alcohol they drink each week

Perfection of the Body

As a result of so much focus on the way we should look, and in a culture in which the concept of self-improvement has attracted considerable attention, we also see a growing trend towards consumers using all means at their disposal to banish the superficial defects. This is an increased adoption towards an optimised approach to aesthetic, rather than a solution to deep-rooted health problems. There is a tension here, however, with more people feeling susceptible to the pressures of the trend than actually taking steps designed to improve their appearance.

“ I have one of those watches at home that picks a satellite and tells me how far I've run and how many calories I've burnt. So I do wear that if I go out and it's nice to know how far you've gone and how many calories you've burnt.

Female, 25-34,
Aberystwyth

”

“ We need to stress that the health service is not just there to pick people up and fix them. People have a responsibility to look after themselves before they find themselves in a position where they need the health services and treatment. People working in the NHS, local government and the third sector can help people take on this responsibility.

Su Mably, Consultant
for Public Health Wales

”

SKINNEPIX

Early 2014 saw the launch of the SkinneePix app which promises users to improve the way they look in photos in order to boost their self-esteem under the slogan “it's our little secret”.

Using different intensity levels in the editing process, the app allows users to enhance their selfies to a self-specified extent. Depending on which setting they decide to go for, SkinneePix can make them instantly look 5, 10 or 15lbs lighter.



Driven by our recognition culture and growing use of social media, there is also an important digital context here, and as a result, considerable links to our theme of Performative Perfection – with many anxious to manage a perfected offline and online image (particularly via quick-fix, temporary solutions such as picture editing software/apps). Further, a culture of 24-hour coverage has made the private lives of celebrities ever more accessible for the consumer and although few might choose to admit it, they remain seriously influential over consumer attitudes as we strive for the body-perfect.

39%
of Welsh
adults agree
with the
statement “I
am too fat”

“ We are in a culture where celebrities appear to play an increasing role, people see them as are part of their lives...that influence can be positive or negative [and] can encourage people to emulate them in good or bad ways.

Su Mably, Consultant for Public Health Wales

”

IMPLICATIONS FOR THE FUTURE OF SPORT

- People are already choosing sports and exercise on the basis of how it's going to change their body. However, driven by the continued cult of celebrity and the rise of quick-fix aesthetic solutions, we expect this to be a particularly motivating factor for the majority over the coming years - as our perception of self becomes ever more outward-facing.
- Providers may need to re-focus the consumer on the method they employ to achieve their final shape/size and not just the aesthetic end result or interim methods that could negatively impact on one's health.
- Sport shouldn't be seen in isolation – healthcare costs cannot be reduced without the permeation and encouragement of physical activity.
- Though the 10s and beyond will be characterised by a landscape of hybrid action between the state and the individual, continued pre-emptive action will be required to encourage and stimulate some to take responsibility for their own health.



ENGAGING CONSUMERS IN THE 21ST CENTURY

Boosted by the Digital Revolution and the proliferation and accessibility of techno-innovations, we have seen the consumer choice landscape change dramatically over the past 5-10 years.

The information age has left us more sensitive to threats to our well-being and more capable of assessing the negative value of any such threat. In response to this, we have seen a stark increase in the number of expert advice and review sites coming to the fore, as a means of gathering and validating as much information as possible before making a decision (removing risk and thus any potential disappointment where at all possible). We are not saying that we have lost a desire for the novel or offbeat – however, we do want to be able to manage that sense of adventure. Lucky-dip style experiences will still be highly welcome in certain contexts, provided they can be sourced from a trusted provider.

In particular, this consumer need to validate levels of risk before committing to a final decision plays a very important role here, and ties into a variety of trends that we have already touched on earlier in the report:

Changing Society: increasingly ageless attitudes and the need for age-neutral activities reduce the sense of risk somewhat for the consumer.

The Quantified Self: growing data accumulation, and as a result, digital prediction of activities the consumer might enjoy, helps to reduce the likelihood of disappointment in the activity.

A shifting economic landscape: maximising value for money is a key consumer priority and can help lead to loyalty, and importantly, a sense of 'owning' one's decisions.

Healthier Lives: bolstered further by self-tracking technology, we expect to see growing self-moderation and discipline with regards to physical activity which will help to reduce the risk of ill-health.

Changing Identity and Unique Belonging:

it is considered safer to follow rather than lead; there are comprehensible risks associated with taking part in an activity that might not fit with your image.

In addition to a growing landscape of choice, demanding consumers and the mounting fragility of their behaviour more generally is also becoming a distinct reality that shouldn't be overlooked. Whilst commitment is fast becoming performance-conditional and transient, we are also seeing a growing consumer expectation for companies to communicate in a certain way with us that opens up a two way conversation in which the consumer has just as important a role to play.

Death of Risk

The language of risk avoidance is reaching everyone: risk is becoming more visible and less tolerable.

Time and money-poor consumers in particular, will welcome the chance to be able to make informed and thus more successful decisions about sporting activities as a result of more detailed information at their fingertips.

In fact, a significant number of our qualitative participants (particularly those for whom sport and physical activity wasn't a priority) revealed that one key demotivator to sport was the idea of having to research what was available in their local area; the process of exercising itself was considered demanding enough in itself, without having to proactively search for options. As a result, easy to access and detailed information to ensure you make 'the right choice' for you personally, will be well received.

We would argue that this need for more information is driven to some extent by the fact that consumers aren't always aware of what it is they want. In fact, our data shows that over half of the Welsh population would like to know more about themselves.

“ I would like [to try] something new that I haven't tried before. I'm adamant that everybody in the world has one thing that they're really good at doing but perhaps they don't find out what that is... So what we need is someone to advertise these things and tell us when they're on, and what the costs are, to create more interest.

Male, 25-34, Aberystwyth

”

Experts for Everything

Further to this, in a heavily consumer review-based retail and leisure landscape, many have found a renewed respect for the expert voice as a means of filtering down to the information and advice that's specifically relevant to them. In fact, in the UK as a whole, around a third say that

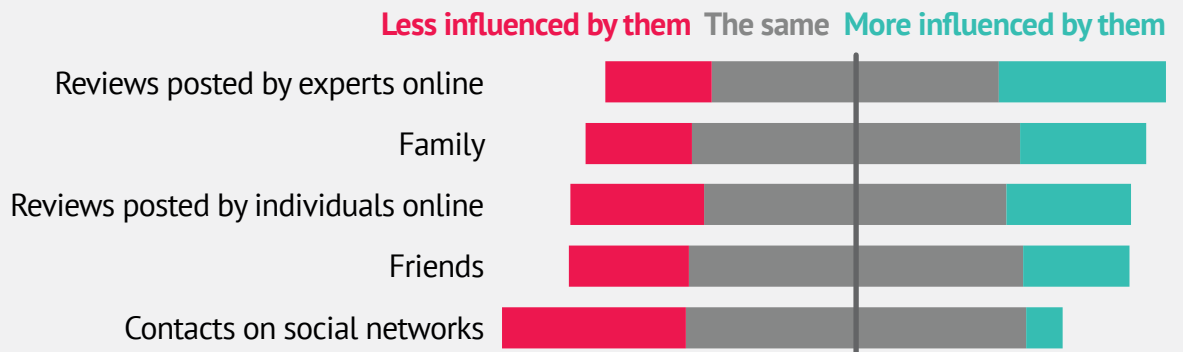
they are now more influenced by expert online interviews than in the past.

54%
of consumers
in Wales feel
a strong or
moderate
need to know
themselves
better

Especially in the case of more delicate matters such as health and wellbeing, the consumer will prefer to hear what an expert has to say, guiding them to make the right choice according to their personal needs, whilst minimising any associated sense of risk from a decision.

EXPERTS FOR EVERYTHING - INFLUENCES

“Thinking about each of the following, would you say you are more or less influenced by them now compared to in the past?”



Source: nVision Research | Base: 2,000 online respondents aged 16+, GB, 2012

EXPERTS FOR EVERYTHING - DATA

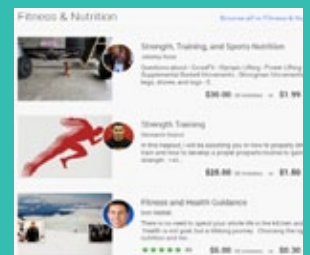
“Who do you turn to for expert advice on health matters?”

	UK Total	Wales Total	
		Total	16-34s
Doctor	95%	96%	
Independent experts online	16%	19%	
Online health forums	24%	31%	
Health magazines	12%	20%	
Someone famous I like and respect	3%	8%	

Source: nVision Research | Base: 3,813 online respondents who seek expert advice on health, age 16+, Great Britain, 2013

GOOGLE HELPOUTS

Launched in November 2013, Google Helpouts is a service which lets users access real-time help and advice, via a video feed, from real people “with expertise across a range of topics”. Help and advice can be sought in a variety of different areas, including Art & Music, Fitness & Nutrition, Computers & Electronics and Fashion & Beauty. For providers of medical help, Google carries out background checks to ensure that qualifications are valid. A number of brands, including Weight Watchers, Sephora and Rosetta Stone also offer branded sessions via the platform. Experts must be native speakers of English and be resident in the US, Canada, Ireland, UK, Australia or New Zealand.



“ Because my life is so busy, what I would like to do is a week’s course of different things, and because I work school term dates, it would be good over half term. I’m not working for the whole week, I don’t have any children, and I’d like to go and learn how to play squash or something. Not for the whole week maybe – Monday, Wednesday and Friday evenings perhaps, to try something new.

Female, 25-34, Aberystwyth

”

The Power of Novelty

However, whilst a wealth of information is key to helping consumers manage the success of their experiences, today’s society is also characterised by short attention spans and time pressures, with many seduced by the new and different.

Ish!

As a part of this, flexibility will be paramount as we progress through the 10s. Driven in part by the recession and the desire to avoid (further) risk of being tied into a potentially unsuccessful agreement, this

43%
of Welsh consumers and 50% of Urban Welsh consumers specifically agree that they feel under time pressure in their everyday lives

growing consumer intolerance to commitment re-wires our lifestyle expectations, whereby both commercial and inter-personal arrangements (from gym contracts to team sports) are likely to feel the pressure and sectors will need to adjust accordingly. That’s not to say that certain brands aren’t something that many identify with; however, where something as fluid and transitional as sporting participation is concerned, companies would be wise to remain cautious and expect a consumer aversion to commitment wherever possible.

ISH!

“I have actively avoided buying a product/service because the contract tied me in for a long period of time.”

UK		Wales	
Total	Parents	Total	Parents
67%	68%	64%	69%

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

FITMOB

Fitmob is an app which has partnered with various local gyms in order to let people attend gym classes at a variety of their neighbourhood’s gyms. More, the membership prices drop according to how frequently people attend classes. The first class they attend costs \$15, if they come back a second time that week it will cost \$10 and if they show up a third time it costs only \$5.



“ [Commitment] that’s really going to put me off...going to the gym regularly [means] you’re signing for 12 months... I would rather have a rolling contract that you can end after a month.

Male, 35-45, Bridgend

“ I’d like a gym where you just turn up and pay for that session and then you go.

Female, 18-24, Cardiff

THE GOOD SECTOR – DATA

% who agree that companies should be penalised for failing to care for the environment

UK	Total	66%
Wales	Total	66%
	35-54s	68%
	Parents	72%

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

SOFT POWER – DATA

“Companies should have a legal obligation to act in a socially responsible way.”

UK	Total	76%
Wales	Total	81%
	55+	85%
	Female	86%

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

The Good Sector via Soft Power

Bolstered by the post-recessionary maximising mindset, the attraction of high quality at low prices has lost none of its sheen. However, for some time now, the consumer expectation has been that companies must care not just about maximising revenue but about their wider social responsibilities – demonstrating very visibly that they are a thoroughly good sector.

As part of the wider brand communication of this theme, we have also seen a significant development in the strength of ‘soft power’, which we expect to continue over the coming years. We are all the more likely to respond well to

a proposition if it is politely/warmly phrased; it is not chic to seem – either as a company or an individual – too aggressively ambitious, too thrustingly entrepreneurial or exploitative.

This trend in particular will be leveraged by both the rise of big data and the brand-consumer dialogues that it will facilitate, and increasing social networking activity.

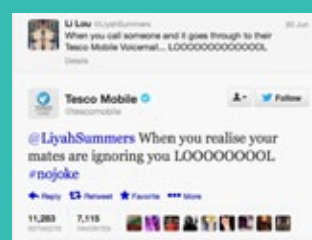
More, in light of the burgeoning review culture, we would argue here that it is important for organisations to embrace and even facilitate this trend and the consumer appetite for transparency; owning and acknowledging the fact that your organisation may have made mistakes but you are listening to consumers and are ready to improve.

COCA-COLA

Early 2013 saw Coca-Cola launching anti-obesity television adverts in the US. Marking the first time the FMCG company had addressed the issue on screen, the ads highlighted its commitment to producing lower-calorie soft drinks but reminded consumers that “all calories count, no matter where they come from” – advising individuals that “if you eat and drink more calories than you burn off, you’ll gain weight”.



TESCO MOBILE




October 2013 saw Tesco Mobile responding to suggestions on social media that the network

was somehow uncool by adopting a sarcastic tone and “trolling the trolls”. In a series of ripostes to tweeters making fun of Tesco Mobile, the hashtag #nojoke accompanied replies of genuine wit and humour, attempting to make the point that there is nothing funny about Tesco Mobile. The retort pictured here was soon retweeted over 11,000 times.

For the sector of sport specifically, there are considerable opportunities for companies to utilise soft power as a means of encouraging people to engage or re-engage with sport; recognising the individuality of sporting preferences by opening up a dialogue and giving consumers a sense that they are being 'heard' based on their personal needs.

IMPLICATIONS FOR THE FUTURE OF SPORT

- Experts provide an increasing source of influence for consumers. As a result, there are opportunities for advocates and local community spokespeople to provide and share personal advice.
- Cost (and risk) barriers associated with the trial of new sporting activities, equipment hire/rental cannot be overlooked. Sport must aim wherever possible to stimulate and support the consumer with new sporting/exercise ideas that mitigate the level of effort required as part of the process.
- At certain points, almost all consumers will feel lacklustre and require motivation to continue participating in sporting activities. New, yet relevant versions of existing activities will be appealing to the masses as they look to liven up the monotony of the everyday.
- Here is a changing face of commitment in the consumer mindset where both time and money is concerned:
 - Potential side-effect on the uptake of team sports where commitment in its traditional sense remains key.
 - Increased interest in pay-as-you-go and 'taster' formats that reduce uncertainty.
- Particularly where communication is concerned, it is important to adopt a human approach to keep the consumer on-side. Maintaining an open dialogue to ensure you continue to understand what they want and need, but also as a powerful means of altering ingrained behaviours.
- Beyond the impact of traditional barriers such as cost and time, there are a considerable number of other factors which sporting providers need to consider in order to ensure positive and retained engagement amongst participants – for example: expert advice, a need to be individual without standing out too much and a careful consideration of age and how this might influence preferences over time. 

SCENARIOS FOR FUTURE SPORTS PARTICIPATION IN WALES

The scenarios that follow have been designed to crystallise the two key factors that will influence the future of sporting participation in Wales.

By looking at alternative combinations of these two factors, we have created four visions of the future, while at the same time recognising that the true picture may well be somewhere between these extremes, be different for certain segments of Welsh society and/or be different by sport, by sports provider or by local authority.

Scenarios designed to differentiate a range of future options

Having examined the trends in consumer behaviour, the impact of technology, and the wider commercial and societal context, we moved on to developing scenarios for the future that would help us stimulate debate and crystallise the implications of these glimpses into the future. We decided to use a classic two-way scenario grid in order to create distinctly different and contrasting futures which we felt would be most suitable for the consultation process with stakeholders. Building on the identification of the themes describing the direction of consumer's future needs, the key was to isolate the most critical uncertainties. These had to be influential in shaping the future landscape but uncertain in terms of their evolution and totally independent of one another.

This process resulted in a grid with one axis representing a legislative/structural dimension and the other a consumer/cultural dimension, creating four alternative scenarios.

The critical uncertainties:

What will the cultural mindset be with regards to sport and the degree to which policy makers will directly seek to empower or inhibit sport

The two drivers chosen were selected to capture the most fundamental changes that could occur on a structural and an individual/agency level. Such contrasting drivers usually produce the most provocative and engaging scenarios of the future.

Based on the myriad of drivers that were raised through the various discussions, we decided on the two drivers which we felt encapsulated the range of ideas in the most convincing way. These were policy and culture.

Vertical driver: Policy

The extent to which future policy across all levels and organisations is acting as either a means to empower citizens to participate in sport or as a key inhibitor. So on one end of the axis we have a scenario where there is a near perfect and joined-up policy in place to provide all the infrastructure, support and motivation required to get people into sport. The opposing end of the axis is a scenario where the policy in place offers no such support and, instead, acts as a turn off to future sport participation.

This dimension relates to at least two of the earlier trend themes. Firstly, the Shifting Economic and Political Landscape theme describes how income polarisation and an increasingly "Naked Citizen" will both fragment the Welsh population in terms of the level of economic access they have towards sporting participation and also create an increasingly self-sufficient (or, from another perspective unsupported) citizenry which will come to take personal and individual responsibility for many aspects of their own lives, including health, fitness and sport.

Similarly, Healthier Lives includes a narrative in which there has been a so-called “Assault on Pleasure”, with government and other bodies have legislated against “bad behaviours” such as smoking and excessive alcohol consumption.

At this point in time we felt it was very difficult to foresee whether policy, in its broadest terms, would be favourable towards sport in 2026 or give it rather less priority than other areas competing for its attention and budgets, since this could depend on the political leanings of the organisations in power at that time, or be affected by factors unknown at this point in time.

At this stage, it is important to note that we recognise policy to be a catch-all term for a wide variety of decisions, made by a myriad of bodies with remits ranging from the very local to Welsh national, to UK-wide or even to European, including: sport (sporting governing bodies/local authorities, clubs, other sporting providers), health, economic development, transportation/access, infrastructure, and so on.

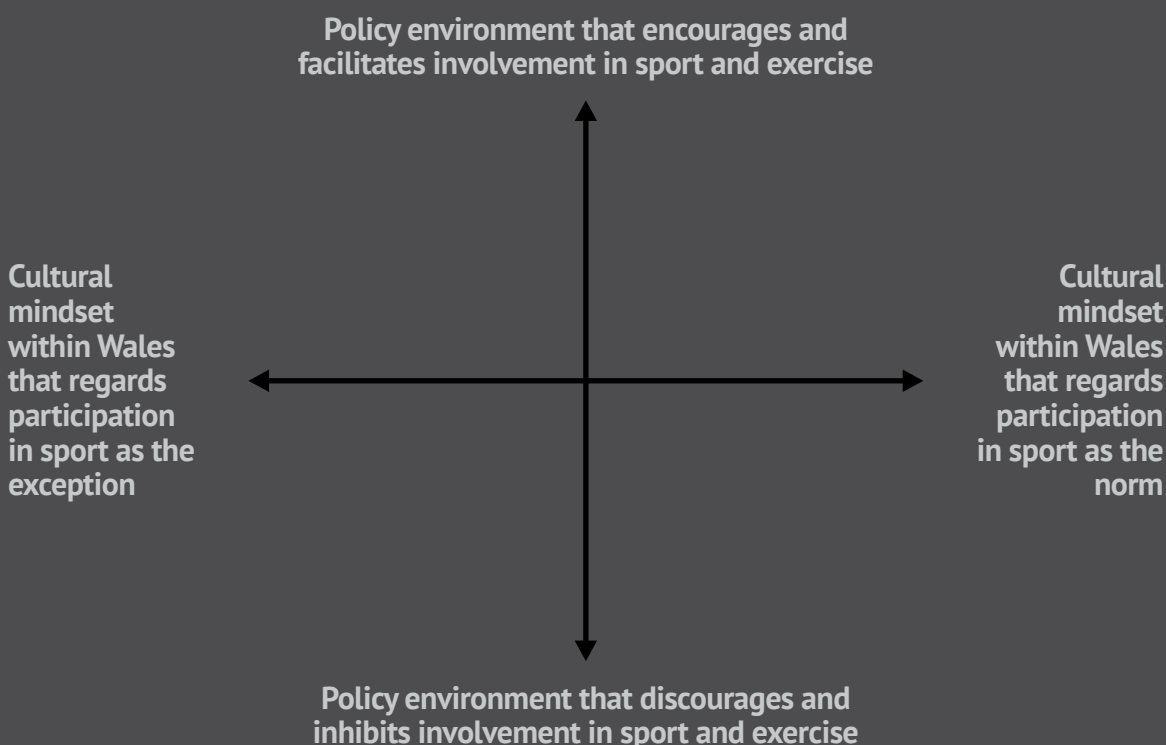
Horizontal driver: Culture

The extent to which social norms and culture move towards one that promotes

more active lifestyles or towards one that encourages less activity. As a result, one end of the axis is a cultural norm that ensures everyone feels it is necessary to live an active lifestyle and the other would reflect a mindset where it is felt acceptable to do no activity at all.

Several of the trend themes discussed in the previous section of this report will have a significant impact on whether the Welsh population of 2026 is one where sporting participation is regarded as the norm, or as a slightly quirky throwback. For example, Demographics and the inherent changes in population structure will have a profound impact on how the Welsh of the future regard the ageing process, and likely the role of sport and exercise in their lives. Busy Lives will also have an impact, although whether this is in terms of creating bigger barriers to participation or in terms of encouraging a push back to overworking. Similarly, the future shape of Identity will have a more tangential, but still important, role in determining how Welsh citizens of the future think of themselves, whilst The Digital Revolution and Changing Consumers are anticipated to have more of a part to play in how consumers engage with sport than why they may or may not do so.

SPORT WALES SCENARIO FRAMEWORK



SPORT WALES SCENARIO GRID



Having created this framework, a series of projective techniques were used to bring the scenarios to life. This resulted in four distinct landscapes describing what we would expect the future of sport in Wales to look like. These were characterised with a descriptive title and visualised to make them easy to communicate, memorable and distinguishable from each other.

The four scenarios are described below:

SCENARIO A: TALK THE WALK

Key Characteristics: Empowering policy but Inactive cultural mindset

This is a world where the public policy at all levels has been perfectly developed to promote and empower participation in sport. However, there has not been a concomitant swing in cultural attitudes; the success in the design of the policy implemented has not been reflected in, nor had a major impact on, the views and actions of broader society. The policy has been ineffectual due to poor communication, poor implementation or inappropriate delivery (or all three). Consequently, the policy framework has been unable to engage with a public which shows a strong unwillingness to change and has failed to put theory into

practice. In sum, this is a world of wasted opportunity and resource, where the focus has been on promoting the supply without having any impact on demand.

Many of the consumer themes discussed above have a role to play in the possible creation of such a version of the future, some in a positive way and less more negatively. The changing *demographic, economic and political landscapes*, for example, should combine to create a focus among policy makers on how to best serve the growing numbers of older citizens, in an environment where post-crisis austerity mitigates against high investment solutions. This policy focus, it is true, will likely encompass more than just sports and exercise, involving such agencies as those concerned with healthcare, housing, care of the elderly and education, for example. In such a situation, it will be vital for sports agencies to foster effective links with other agencies, in order to build truly *cross-curricular* arguments for funding by ticking as many boxes as possible.

The changing definition of *Identity* and the (slowly) growing recognition among consumers that they should lead *Healthier Lives* both offer real challenges (or from another perspective, genuine opportunities) to sporting participation

SCENARIO A

TALK THE WALK



and may provide some of the explanation for why empowering policy may not always lead to a more positive mindset or increased participation.

Similarly, many of the factors discussed under *Switched on Society* represent barriers, both perceptual and practical to increased participation, leading to *talk* not turning into *action*. Sports providers will need to place increasing emphasis on helping to remove these barriers wherever possible by making sports participation as easy as possible. For example, these could include some of the following initiatives (which we list purely to illustrate the types of ways that such barriers can be reduced rather than as definitive recommendations for implementation):

- Partnering with local businesses to offer sport *in the workplace* so that people don't have to go out of their way to access sport
- Taking sport out of leisure centres and into the community (in the style of the mobile library, perhaps) so that people can participate by literally walking out of their front door
- Providing *park and ride* style transportation to and from sports offerings.

To a great extent, **Talk the Walk** represents a future of missed opportunity. Given that the underlying policy environment is favourable towards provision of sport by providers and, in theory therefore, to high levels of participation by the public, a key question is clearly why the public would not be receptive to what is being offered to them. A number of possibilities emerge:

- The decisions made about how to implement policy and some of the specific choices about what to provide and where to provide it may not match what is needed. Clearly, hard-won policy support and resourcing investment needs to be used optimally if it is to create the desired changes in mindset.
- New sports-related offerings may not be motivating or adequately communicated to the public. There was widespread acceptance among workshop participants that today's media-savvy and hard to engage consumer only responds to the very best of product offers and marketing messages. Communication with the public needs to be relevant to today's (and tomorrow's) world in terms of

the choice of messages and media channels and either delivered in a highly creative, attention-grabbing manner or delivered with such reach and frequency as to demand attention. The *Engaging Consumers in the 21st Century* and *Digital Revolution* themes give further proof of the importance of reaching out to consumers in the appropriate manner by leveraging new technologies, putting messages in the places where consumers are likely to be most receptive to them, and recognising the fickle, commitment-phobic nature of public attention.

Talk the Walk was felt to be a very worrying scenario for the future since policy makers would likely react to the disappointing uptake of sport in the face of the resources provided by quickly pulling the plug on investment, creating a rapid downward spiral of declining interest and participation in sport and exercise. In other words, this situation would, most likely lead to a vicious circle where public disinterest would lead to lowered funding and less policy focus on sport, in turn creating even lower levels of public engagement, and so on.

SCENARIO B: SPORTOPIA

Key Characteristics: Empowering policy and Active cultural mindset

In this world, the Welsh citizen enjoys both optimal opportunities to engage in sport and the mindset that ensures they make the most of such opportunities. In such a scenario, there will be strong cross-sector collaborations and all barriers to participation are identified and removed. The policy framework will be communicated well and implemented successfully. Moreover, there will be clear evidence of the impact of this on other key policy areas, such as health, education, transport etc. In sum, this is a world which enjoys a clear long-term view of how sport can be optimally promoted and this has resulted in transformative action on a societal level.

Sportopia clearly represents something of a *Holy Grail* for sports providers, a world in which policy and mindset create a virtuous circle of ever-increasing positivity. Inherent in the description is the notion that providers will have found a way to involve everyone, even those groups of society



who are currently disenfranchised from sports participation. Such a shift may be brought about in a number of ways (at least in theory), depending upon the reasons underlying current non-participation by such members of the public.

Financial exclusion is clearly one of the greatest inhibitors to participation amongst current non-participants whether from the point of view of ensuring that paid-for participation is not even considered on the grounds of unaffordability (for memberships, kit, equipment, etc.) or merely by producing a segment of Welsh society that feel excluded from society in general. Clearly one of the underlying defining factors of this scenario is an assumption that policy makers will have prioritised the needs to this segment of society but, as previously, it is recognised that policy changes will not be enough in themselves.

Within a future world where sports and exercise have been given high priority, we can assume that investment will be forthcoming to open up sporting participation to those currently excluded from it on financial grounds. But, again, policy changes may be for naught if there are not accompanying changes in mindset. Achieving such shifts in attitudes amongst a group who have no history of sporting participation and who have come to regard sports participation as perhaps elitist, and certainly middle-class, will be hard to achieve and will require a sensitive and tactful approach of gentle persuasion.

We should also note that financial challenges are not the only way in which the Welsh public is excluded from sport. Age, has also been a psychological barrier to participation with participants dropping out of sport because they feel they have become too old for it, and non-participants feeling that it is too late for them to change their habits. Yet, the *Changing Society* theme, with its key message of *Ageless living* suggests that such assumptions about how people in Wales view what they can or cannot do at different ages are breaking down. By 2026 this phenomenon will have become even more marked and we believe that there will significant opportunities for

Sportopia to mean *Sport For All Ages*. Providers should look for opportunities to create age-neutral activities by, for example:

- Encouraging older citizens to re-establish a relationship with sport that may have lapsed
- Re-scoping sports activities to be age-neutral, possibly by re-evaluating the rules of sports, the suitability of sports and exercise activities to be carried out by mixed-age groups (in the style of differentiated learning approaches in the classroom)
- Fostering a belief amongst older members of society that *you are never too old to learn or try something new*.

But **Sportopia** will also be about maintaining or increasing levels of participation amongst current participants.

We believe that likely motivators for increased sporting participation to individuals all along the spectrum of involvement from so-called *couch potatoes* to Olympic medalists may include some ideas discussed under the *Changing Identities, Healthier Lives* and *Digital Revolutions* themes.

The combination of these themes reference Welsh society's changing attitude to identity and health, and usage of technology as both a facilitator and a social networking tool. We believe that the possibility of a **Sportopia** mentality can be significantly increased by playing close attention to the role that sports and exercise has in the creation and online sharing of a positive and aspirational self-image amongst participants, for example by:

- Overtly showcasing the ability of specific sports, or sport in general, to help with body sculpting as well as other health benefits.
- Promoting the pivotal and complementary role that sport/exercise can play alongside diet and nutrition in creating a healthier populace.
- Leveraging the power of sport/exercise to offer social interaction, team building and community spirit.
- Offering an optimal balance between national (UK), national (Wales), and local offerings.

SCENARIO C

COUCH CULTURE



- Ensuring that attention is given to the shareability of any sporting participation.
- Actively managing all forms of risk to ensure continued engagement.

SCENARIO C: COUCH CULTURE

Key Characteristics: Inhibiting policy and Inactive cultural mindset

In this scenario, the Welsh citizen suffers from an inactive mindset and policy does nothing to alter this attitude, if anything, it encourages it. This is a passive society where inactivity is the norm. Policies and agencies are both disjointed and there is no clearly defined strategy of how to attempt to turn around the underlying cultural norm. In sum, this is the worst of both worlds, where poor strategy and unfavourable societal norms combine to create a scenario where sport participation is at an all time low.

If **Sportopia** represents an ideal situation for the future of Welsh sporting participation, then **Couch Culture** is its antithesis, a world where Welsh society doesn't feel inclined to participate, and even if they did, the options for participation would be limited.

As in the case of **Talk the Walk**, busy lifestyles, economic disenfranchisement and competition from other leisure pursuits all conspire to put sport and exercise to the back of people's minds. Rather than there being no policy in place with regards to sports participation, workshop participants felt that the future situation was likely to be exacerbated by disparate or disjointed policies, and/or of poor or non-existent collaboration between the various agencies trying to enact those policies. There may, for instance, be duplication of provision in some instances, and of total lack of provision in others, with the result that viewed across the country as a whole, the sporting offering would appear incredibly patchy. Those in areas of higher provision might or might not participate, while those in the rest of the country would have no chance of participation, even should they feel so inclined. Clearly, under such a set of circumstances, a key requirement would be for clarity of strategy and, potentially for someone to take overall stewardship of sports and lifestyle related policies, with remit to ensure efficient implementation of an integrated strategy.

From the consumer standpoint, many of the same factors underpinning **Talk the Walk** are also likely to be true in this case, but without the policy *safety net* to take up the slack.

SCENARIO D: AGAINST THE ODDS

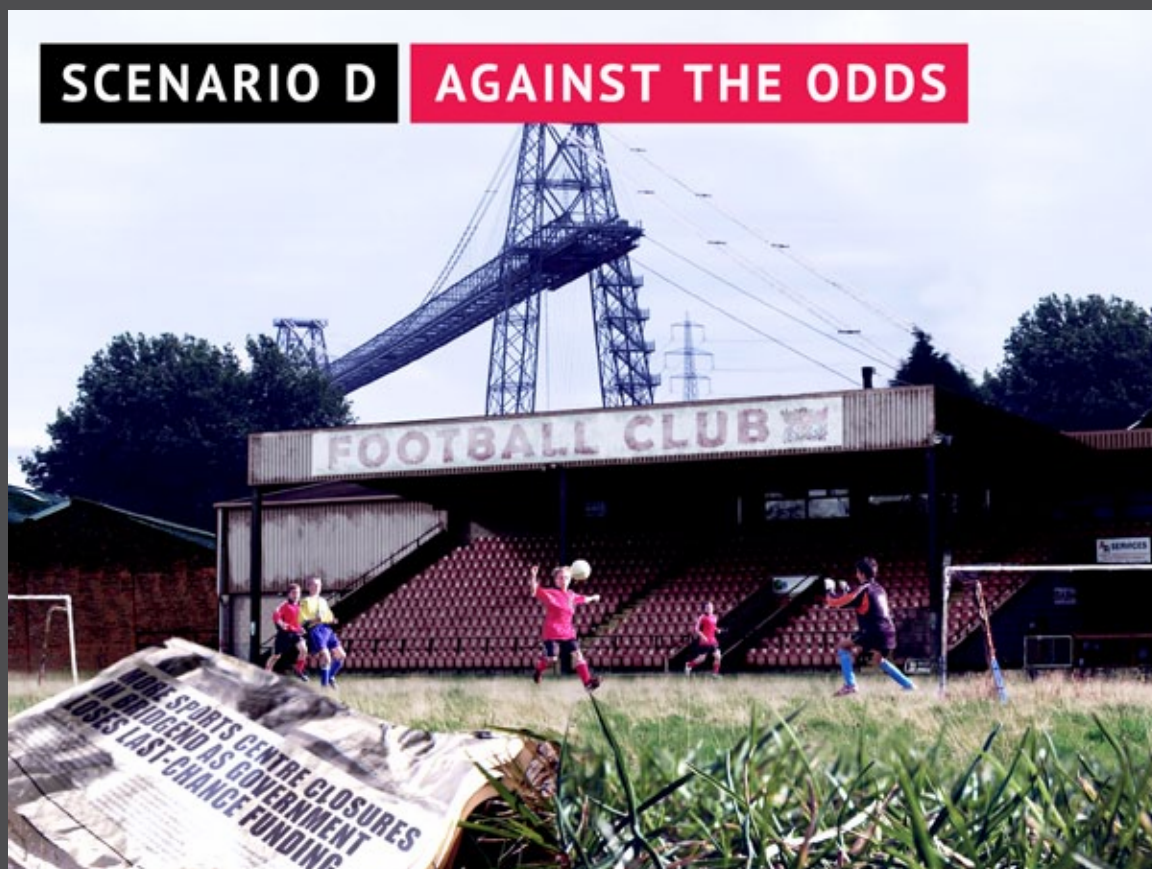
Key Characteristics: Inhibiting policy but Active cultural mindset

This scenario is characterised by a transformation in societal norms towards more active lifestyles, despite very little support from public policy. Here we find frustrated consumers, who want to take on more sporting activities but are hampered by a lack of opportunity. As a consequence, many new service provisions develop through the private sector, which puts added strain on the polarisation of opportunities between the 'haves' and the 'have not's. Any progress made in this scenario will be in pockets of excellence (among those with the most resources). In sum, this is a world in which societal attitudes have developed in spite of poorly delivered policy; any progress will likely be short lived if the infrastructure is not put in place to capitalise on the apparent shift in consumer mindsets.

In the world of **Against the Odds**, the policy and institutional framework fails to establish ways to support those who find it difficult to participate. This leads to unequal access to opportunities through uneven technology access and cost-ineffective solutions – income inequality and related cultural issues lead to unequal participation levels.

In short, **Against the Odds** requires consumers to drive their own participation and, as now, those who are knowledgeable, able and confident will be far more motivated to do this, and to act. For those who are stimulated, motivation is likely to come, as in the case of **Sportopia**, from a desire to create *Healthier Lives*, or to fit in with *Changing Identities*, further enriched by the technological empowerment of *The Digital Revolution*.

The visual metaphor that we have used for this scenario attempts to convey a situation where the keenest participants make use of whatever facilities they can find, however run down, inaccessible, unsuitable or dangerous they may be. There may be a useful lesson here, in that, under these conditions striving to provide optimal conditions in which sport can be played may be unfeasible.



Adopting a ‘good enough’ mentality that recognises that imperfect facilities and options are still far preferable to no facilities at all, may be a crucial mindshift, leading to the identification and usage of a wide variety of sites, perhaps not originally designed for sport, but which can still offer a focal point for some kinds of sporting participation.

It is also worth recognising that **Against the Odds**:

- Has differential impact on the extremes of sporting participation: for this reason, if this scenario is close to representing the 2026 truth for some of Welsh society, we are very likely to see a hugely polarised society with regards to sports participation, to an even greater degree than is true in 2014.
- To some degree represents the current variable nature of sporting provision across Wales, played out on a larger canvass. In other words, this scenario describes a world in which most of the country comes to resemble those areas of the country that are currently least well served in terms of sporting provision.

Assessing the four scenarios

These scenarios were evaluated by workshop participants on two key aspects:

- Perceived **likelihood** of best reflecting the prevailing landscape in Wales in 2026.
- Perceived **desirability** of the scenarios for promoting an active tomorrow for Wales.

The four scenarios were ranked from 1st to 4th in both respects, with the results for desirability summarised to the right.

DESIRABILITY

B: SPORTOPIA



D: AGAINST THE ODDS



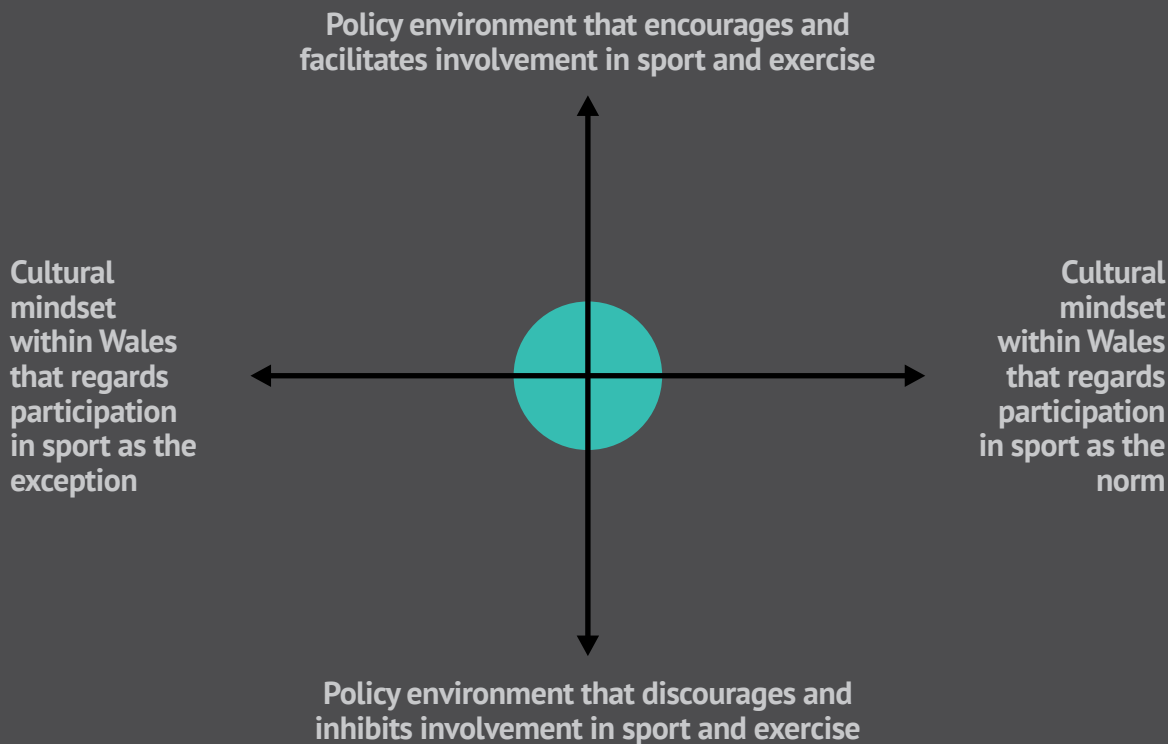
A: TALK THE WALK



C: COUCH CULTURE



SPORT WALES – LIKELY SITUATION 2026




When it comes to the future likelihood of these four scenarios the situation is somewhat more complex. The key stakeholders consulted for this project felt that the most likely situation lay mid-way between the four scenarios, as shown above.

In other words the most likely future situation for Wales is one in which:

- Policy is neither fully empowering, nor fully inhibiting but some way between these two extremes.
- Cultural attitudes towards sports are neither fully active, nor fully inactive but some way between these two extremes.

- Different scenarios will affect particular segments of Welsh society in different ways or be more relevant in specific parts of the country or for different types of sporting activity, rather than a situation where one scenario will be dominant across all groups, areas and sports.

Clearly then, in striving to create a future where both these factors act in favour of increased sporting activity, work needs to be done to both promote and implement an empowering set of policies and also to change cultural attitudes towards sport and exercise. 

APPENDICES

QUALITATIVE RESEARCH DETAILS

Primary qualitative research

In March 2014, Future Foundation conducted a qualitative research stage to explore attitudes towards sport and physical activity that included 4 focus groups and 4 in-depth interviews, with a range of participants of different ages, gender, lifestyles and frequency of taking part in physical activity. Research was conducted in the English language in Cardiff, Bridgend and Caernarfon and in the Welsh language in Aberystwyth.

Expert interviews

Future Foundation interviewed four experts with different areas of focus within the Welsh landscape, from politics to health, to help develop a broad view of sporting participation in Wales between now and 2026.

List of experts interviewed

Christine Chapman AM, Labour and Co-operative Member of the Welsh Assembly for Cynon Valley

Adele Baumgardt, Vice Chair, Sport Wales

Sunil Patel, Campaign Manager for Show Racism the Red Card

Su Mably, Consultant for Public Health Wales

QUANTITATIVE RESEARCH DETAILS

The core base of quantitative research used in this report was taken from nVision; Future Foundation's proprietary research database of key UK trends, emerging trends, reports, standalone data charts and trend-related innovations. Where relevant, trend data in this report has been cut by the Welsh population and various demographics within Wales. All Future Foundation's GB research is conducted online with a nationally representative sample between 1,000 and 5,000 consumers

Sport Wales Active Adults Survey 2012

The Active Adults Survey is a large scale survey of the adult population in Wales. Adults (defined as aged 15 and above) living in private households in Wales were eligible to take part in the survey. The survey is done face to face, with an interviewer visiting the person at their home. Households are selected at random, and the interviewer randomly selects someone from the household to take part in the survey, when they visit. The Sport Wales has commissioned large-scale population-based surveys of adult participation in sport in Wales since 1987.

LITERATURE REVIEW

An in-depth literature review was undertaken prior to the workshop and qualitative research processes, designed to investigate the key factors and themes for Wales from a range of 3rd party sources: Demographics & Health (Office for National Statistics, and the UK Census), Economic (Oxford Economics/nVision forecasts, Institute for Fiscal Studies, Scenarios for the Welsh Government Budget), Political & Legislative (Future Pressure on Welsh Public Services, Welsh Sports Association, Commission on Public Service Governance & Delivery, Commission on Devolution in Wales), Infrastructure, Service & Facilities and Education & Skills (nVision trends and proprietary GB research data, NatCen British Social Attitudes Survey).

PROCESS

This report was pulled together using all of the above quantitative and qualitative research sources, including the results of a two part in-depth workshop process where Future Foundation invited workshop participants (from both Sport Wales, Public Health Wales and a variety of other sporting and educational bodies) to visualise four different potential scenarios for the future of sport in Wales.

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