Trends in fitness

SPORT ENGLAND

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Executive Summary

Sport England launched some very popular campaigns in the past that targeted women to be more physically active and engage in sport. Although these campaigns managed to increase the participation of women in sport, there is still a significant percentage of the population in the UK that is inactive. In this context, Sport England and Loughborough University London discussed the potential problems that prevent women from exercising. During this process, six different personas were created that described the issues the sport industry faces from the consumer as well as the supplier side. These personas were then narrowed down into themes that identified five areas for improvement of the sport industry.

"We hope this report will help Sport England in the drive towards an active nation"

- The team

CONTENT

INTRODUCTION

Loughborough University in London is an academic school of the East Midlands based Loughborough University. The expansion to London has seen the development of new markets and enhancement of partnerships; within the business, commerce, enterprise, industry, government and international higher education institutions, to reflect the diversity of our programmes of study and international student cohort. Loughborough University in London's vision is to create a multicultural, multidisciplinary postgraduate student community, at a capacity of around 1,000 full time postgraduate students of varying nationalities.

Loughborough University London Staff met with Sport England's CEO Jennie Price in August 2017 to look at ways the two organisations can work collaboratively. From this meeting Sport England proposed three key problems/challenges that it was seeking solutions for.

This report focuses on the collaborative working towards the first of those challenges through a sandpit activity, conducted on the 29th January 2018, of which recommendations and next steps have been scoped.

Sport England

Fashion in fitness

Sport England has introduced its new strategy to cover the period 2017 - 2021. Entitled Towards an Active Nation, this was shaped by the Government's publication Sporting Future: a new Strategy for an Active Nation, published in December 2015 (Sport England Strategy, 2016). The UK Government publication acts, in this context, as leadership guidance for Sport England's strategy development. The government's vision aims to reclassify the nature of successful achievement in sport by focusing on five key outcomes: physical wellbeing, mental wellbeing, individual development, social and community development as well as economic development. These outcomes encompass a sporting policy that looks beyond simple participation to ways in which sport changes lives and becomes a force for social good (Sporting Future, 2018).

Following the government's focus, Sport England's vision with this strategy is that "everyone, regardless of their age, background or level of ability, feels able to engage in sport and physical activity." (Sport England, 2018)

According to Jennie Price, Sport England's Chief Executive, everybody should feel welcome, discovering something either in sport or physical activity that could addresses their specific needs. More specifically, what Sport England's new strategy tries to do is to get more people from every background regularly and meaningfully engaging in sport and physical activity. This includes a focus on under-represented groups (for example women, those with disabilities, people from lower socio-economic groups and some Black, Asian and Minority Ethnic – BAME - groups).

Looking back what has been achieved as the legacy of London 2012, a progress in some areas must be recognised, but it is important to note that sport in the UK goes broader and more deeply than London 2012.

Data from previous surveys regarding physical activity has been used to guide policy development and investments in order to cover the key strategic insights. One of the most expressive results is that, although many more people are now active (60,6%), which means that they are engaged with more than 150 minutes of exercise per week, there are many more still insufficiently active (around 6.2 million people), despite the fact that they demonstrate the desire to be active. This behaviour change is the target focus for the Tackling Inactivity strategic programme. Sport England dedicates effort and investment to make this change easier and to guarantee that they will stay active. To achieve this and the other key outcomes (engaging children and young people, volunteering, taking sport and active lifestyles into the mass market, supporting sport's core market, providing local delivery and improving facilities), Sport England has developed a Mass Market Directorate, with the following key functions.

1

Influence behavior change

To develop, deliver and support interventions that increase the resilience of people who have an 'in / out' relationship with sport and physical activity

2

Develop and deliver best practice

in marketing and business development: To ensure that Sport England applies the principles and best practice of marketing and business development/management to achieve its strategic outcomes

3

Use data

to help people get active: Using open and shared data to create world class, innovative consumer solutions to enable them to engage with activity, and ensuring our sector is literate and agile in the use of data.

Old campaigns and results

"This Girl Can" - 2014

Previous programmes and campaigns have proven to be successful in stimulating people to change their behaviour. For example, the This Girl Can campaign demonstrated how campaigning can help to nudge people into more sustainable habits. Since its start three years ago, the campaign has prompted 2.8 million women to do some or more sport and 1.5 million of these women started exercising or came back to it after a break.

From this results and further consultation surveys, requests for more consumer campaigns have appeared, with a strong potential to move the market due their wide appeal and easiness for people to fit into their busy lives. This includes support for more women engaging with cycling and the creation for the This Girl Can Swim session, which is design around a target audience, focusing on little things that make swimming easier and more enjoyable (for example, providing hang towels beside the pool, so women can cover themselves as soon as they get out of the pool and do not feel exposed).

These examples reflects the strategies of Sport England proposals to "make life easier for the millions of people who are trying to be active but find that the physical, social and emotional cues and incentives to act are just not strong or relevant enough to their lives." In this sense, Fashion in Fitness multi-disciplinary sandpit event tried to discuss some ideas to answer the main question: "How can Sport England plan and introduce interventions which will make a real difference for the fairly active group of women between the ages of 24-39 years?" The meeting was an opportunity to discuss and map out the barriers/challenges to making exercise a regular part of this target group daily life.

"I will if you will" - 2013

The campaign was piloted in Bury and delivered by Bury Council and is all about helping the women and girls of Bury to become more active, more often and have fun while they do it. The themes the campaign is narrowing down are the following

Accessible Activity
Individuals with physical disabilities

Mums and Babies
For future and recent mums

Family Friendly
For the whole family

Over 60's
For individuals over 60 years old

Exercise for Mental Health
Individuals mental health problems

FACT
Fit After Cancer Treatment

BEATS
Bury Exercise And Therapy Scheme

"Go where woman are" - 2015

The report aims for providing an extensive and detailed insight on how to engage more women and girls in sport and exercise. The report's main effort is to affect how the sport and exercise providers are dealing with women as an audience. It addresses the following themes

Instilling sense of belonging

Creating a responsive sport industry

Bringing sport to a career woman

other impactful campains

Adidas and Nike are both seeing growth in their women's apparel products. They are segmenting the women's market not with personas but with the physical activity or sport itself, i.e. training or running respectively. Also, Adidas supports that models and bloggers, not athletes, have stronger impact on female audience.

'Marketing to women doesn't mean excluding men, but it does mean excluding stereotypes'

Nike has paid extra attention to women, while trying to tap on the market driven by an "athleisure trend" where consumers buy athletic products and wear them outside of sporting activities as well (i.e. household chores, office). Nike leads the market by not only selling apparel and shoes, but also offering a vast selection of mobile apps and other services to help serve its customers best, which could work as a recommendation for Sport England current and future projects.

The Sandpit

29th of January 2018

Loughborough University
London

Leading Team

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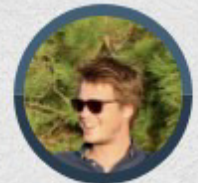
Students

Gabriela   **Max**   **Elizabeth**

Postgraduate students in Sport Business and Leadership

Julia   **Leonidas**   **Nathan**

Postgraduate students in Sport Business and Innovation

The Sandpit

29th of January 2018

Loughborough University
London

Guests

Professional Guests

Marvis Wenham - Leader of Physical Activity
Crystal King - User Group (24-39yr old Woman)
Patrick Diai - Leader of Physical Activity
Juliette Raison - Leader of Physical Activity

Buse Aksu - User Group (24-39yr old Woman)
Naz Begum - User Group (24-39yr old Woman)

Academics

Hester Hockin-Boyers - PhD Candidate
Yasemin Canik- PhD Candidate
Petros Gazelidis - Msc in Sport Business and Leadership

Dr Emily Hayday - Lecturer, Institute for Sport Business, Loughborough University London
Dr Aoife Sadlier - Research Associate, Loughborough University
Dr Simon Hodder - Senior Lecturer in Ergonomics/Human Factors, Loughborough University
Llayda Gulseren Demir - Faculty of Sport Sciences, Sakarya University

Sport England

David Newton - Executive Director Mass Market
Allison Savich - Head of Data & Market Innovation

Fashions change quickly in this market, and people who are captivated by one product may drop out of activity altogether if their favourite class is replaced by the latest craze. This is also a real challenge for the supply side of the market, due to the need to retrain, restock or redesign. Arguably, other sectors cope with the challenges of a changing market much better in terms of customer retention - what can we learn from them?

Programme of the day

9.30 am

Arrive at Loughborough University London (LU LDN)

10.00-10.15

Welcome and outlining of the brief from Dave Newton

10.15-12.30

Icebreaker
User interviews and creation of user journey/maps to identify barriers/challenges

12.30-1.00

Lunch – Users depart after lunch

1.00-2.30

Presentations – feeding back the journeys, including pain points/opportunities
PhD students add to discussion

2.30-4.00

Prototyping solutions.
The aim was to use the findings from the user-focused session to develop in-depth research and/or design questions and identify how these can be taken forward. This will draw on the expertise in the room. Preliminary, activities can be divided into two categories: Research and Events

4.00-5.00pm

Report back and wrap up strategy and develop systems to ensure that participant data is collated and analysed and regular reports are delivered as required in a timely and effective manner

Ensure that policies and procedures are consistent with the university's policy and obligations in respect of the child safeguarding and protection

Working with Personas

The term "persona" was introduced by American software designer and programmer, Alan Cooper (Cooper, 1999). This technique is heavily used in design projects and customer oriented decision making. Working with personas is an alternative way to present the user-perspectives and experiences that are collected through observations, data collection and Interviews (Blomquist, 2002). Indeed, a persona is a fictional representation of a customer belonging to a specific target-group. John Pruitt and Tamara Adlin also describe personas as a "detailed descriptions of imaginary people constructed out of well-understood, highly specified data about real people" (Pruitt *et al.*, 2006). A carefully constructed set of personas will allow to understand customer needs and improve customer experience.

Objectives

Personas appeared to counter the flaws of large-scale market segmentation and extensive quantitative researches. Some quantitative surveys push to premature buy-ins because of the mystic of the numbers (Siegel, 2010). Questions can be asked about the limitations of quantitative researches and the dangers of excessive deference to these methods (Siegel, 2010).

Guide decisions about features, navigation, and interaction
Companies are constantly looking at improvements and solution. Personas will help determine how those solutions will serve the targeted customer and makes discussions clearer and decisions easier to visualise.

Help stakeholders and designers keep the users in mind
Whenever we hear the name of someone we know, we recall a number of details about this person like his needs and character for example. The same is triggered by personas. By naming the persona and assign her a specific set of characteristics, we will quickly identify the needs of our persona and think about ways to satisfy those needs.

Facilitate communication between stakeholders
Agreeing on the customer target and having a clear representation of it, facilitates communication between the decision makers. Since stakeholders are on the same page after drawing up personas, they will be better able to separate personal preferences and targeted customer needs (Ward, 2010)

Create Personas

The creation process of personas often depends on the number and depth of the data collected. As described in The Persona Lifecycle, creating personas is a straightforward process in which the collected data is summarized, clustered and analysed in order to highlight themes (Pruitt *et al.*, 2006). Once those themes have been highlighted, persona "skeletons" are created. Finally, from the skeletons, personas are developed by adding data, details storytelling elements and photographs.To conclude, other techniques are used in this context like user roles, user segments and extreme characters but, they all follow the same principles as Cooper's personas (Mulder *et al.*, 2007). Personas are a result of intensive data collection and cannot be constructed without a broad knowledge of the market and the customers. We believe Sport England could use this process to understand their targets and develop their marketing strategies. However, a deep understanding of their data needs to occur before persona "skeletons" can be created.

Personas of the day

Bill — 45
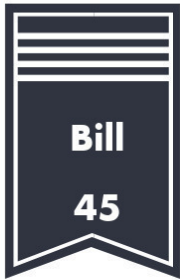
Profession

Leisure Center Manager

Background

- Provides 24/7 activities with no equipment
- Focused on engaging people in the community & by a special membership program they try to attract young people

Story

- No forward movement of cash, can only spend what he has been given, cannot focus on marketing and sales
- Public sector influenced by the establishment, government policies and multiple stakeholders. The procurement makes it slower (more infrastructure being sold to the private sector)
- Frustrated about the "terms and conditions" that prevent them from expanding faster,
- Struggles with external management and the poor facilities

Maria — 30

Profession

Zumba Instructor, self-employed, coaches in local public gym.

Background

- tries to engage her students by tailor-made fitness plan.
- Interacts with her students on social media and apps.

Story

- Struggles with generations issues (old vs. young) and knows that different people will have different needs and different values
- Wants the classes to be less commitment students would not feel its mandatory and will enjoy it
- Puts efforts in group engagement classes more inclusive
- Works in a male-dominant segment which makes her feel frustrated
- Complains about her expensive rent and the low pay she gets.

Sarah — 28

Profession

Sports Facilitator in a University

Background

- she is a former athlete from South America & has a bachelor in sport
- She provides and promote sport sessions at Universities

Story

- Knows that the timetable needs to suit sports, otherwise students will not feel motivated to work out because of studies loans
- Recommended the university to promote some sports ambassadors, influencer students who can motivate others
- Knows that the community feeling is important and makes students feel the sense of belonging
- Frustrated when she realises that the university has no sports facilities, infrastructure or transport to take the students to sports

Personas of the day

Holly — 30

Profession

Marketing executive

Background

- Commutes daily from central London to Stratford
- Successful career woman

Story

- Would like to train for a 10km run, but prefers movies sessions
- Influenced by her colleagues and social media
- Aware of importance of physical activity for mental health frustration about her inactivity
- Complains about time management & claims that the working environment that not the best place to keep a good nutrition and doesn't help her to start working out
- When she leaves work it is already dark demotivating her from taking part in the fitness community

Jamilia — 38

Profession

Housewife

Background

- From Eritrea
- Religious routines (Islamic background)

Story

- Wants to start a physical activity, but is scared to do something unfamiliar and of a cultural misunderstanding
- Her partner does not support her
- Makes she fell alone, isolated, shy and scared. She does not feel she suits in the fitness community.
- Likes shopping, markets, sewing, gardening, and reading
- Lack of time due to household

Laura — 27

Profession

Web Designer

Background

- Mum who works long hours and lives very close to her job
- In her opinion, social and fun are very important

Story

- Worried about her image in the mirror and aware of the importance of exercising but still physically inactive
- Tried several different physical activities, but she is still looking for her "thing"
- Spending time in the gym makes her feel guilty about abandoning her kids
- Confused about the different types of exercise, not enough information
- Feels that the sessions are very long and she does not have time for this.

Narrowing down to main themes

Using Keywords from activity 1, we narrowed down the personas into five key themes. Groups were formed according to the participants individual interests. From themes, we drew research questions to push reflection further and provide Sport England with focus areas for the future.

Information and Education
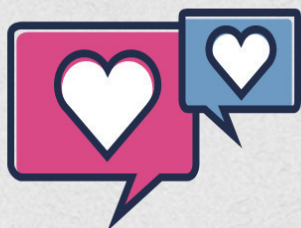
Sport Industry Instilling Sense of Belonging

Upscaling Community Sports Initiatives

Bringing Sport to a Career Woman

Creating a Responsive Sport Industry

5 Research Areas
For Sport England

I CAN BE PART OF THIS

Q1) What makes you feel like you belong?

Q2) Why do you struggle to find a sense of belonging in sport?

Targeting minority groups within communities such as the Black and Minority Ethnic (BME) demographic to create a sense of belonging. Can these groups be engaged through connecting with established non sporting pursuits or groups?

Case studies to be explored:
- Walking Netball
- Bollywood Dancing
- Zumba
- Yoga/ Pilates

CREATING A RESPONSIVE SPORT INDUSTRY

Q1) How can influencers be used as resource in order to reshape (inform) the current 'traditional' sports industry business model?

Q2) How do users engage with online fitness app content and what is needed to create a transition into participation?

The future of the sports industry is likely to be:

- Emerging
- Dynamic
- Less regulated
- Shift towards fitness/lifestyle
- Market Driven
- Unleashed participation mechanism

Influencers in the sport industry restrain the industry :Masculine, Traditional, Established, Unresponsive

KNOWLEDGE TRANSFORMATION FOR CHANGE

Q1) How can the sports industry be more responsive to change?

Leisure time can be filled with many activities and vary greatly between different demographics.

- How can sport create a sense of community to attract different demographics?

- How can information and education bring sport to all?

- Increase in public knowledge of community sport

- How can sport be personalised to promote behaviour change?

- How can we make users decide on sport rather than other leisure time activities ; can the two become combined?

BRINGING SPORT TO A CAREER WOMAN

Q1) What are companies doing to improve sport for the workplace (especially for women) and how can this be improved?

Career women have a distinct lack of time. Why is it a problem?

- Overbooked private sector, busy after work hours
- False assumptions

Collaboration with companies to:

- Optimise time
- Boost Productivity
- Relieve stress
- Source suitable activities and spaces
- Create a detailed workforce activity guideline

UPSCALING COMMUNITY SPORT INITIATIVES

Q1) How can community sport initiatives be upscaled and made reflective of different communities, generations and segments?

Working to identity wants/needs of demographic segments within local communities.

- Simplicity is key to the sustainability of an upscale.
- Are franchises a more feasible way of upscaling?
- What stakeholders and facilitators are key in the movement?
- Community sport to become a household name and 'norm'
- Should there be an incentive for fitness or volunteering?
- What role will technology play in the future or sport, e.g. gameification

What's Next ?

Create a sense of belonging

The discussion of the different themes addressed the different problems that were identified out of the six personas. Whereas those issues tackled a variety of topics and reasons, one thing became apparent through all the different themes: in sport, people are looking for a sense of belonging. Conversely, if someone does not feel that he or she belongs to a certain community that is created around the sporting activity then this person is likely to drop out. However, we live in times where for instance more and more gyms and leisure centres open up that try to gain a competitive advantage on the market by offering low membership fees and prices. Accordingly, the service that is provided by those facilities is based on low costs and hence characterised by anonymity. This mismatch between supply and demand means that the big fitness chains that exist across England struggle to attract people who are willing to exercise yet want to feel that they are part of something. Therefore, it must be identified what makes someone feel like they belong and why people struggle to find this sense of belonging in existing sports.In order to address this issue, such sports as Yoga that have successfully and constantly grown in recent years can be analysed in terms of how they create this sense of community. Especially in times where inclusion of minority groups has become more important than ever, the message that sport can connect people of all backgrounds and form diverse communities in which everybody is and feels welcomed could further be communicated.

What's Next ?

Change in demand

During the debate, the theme of a career women and housewife kept emerging who cannot dedicate herself to a certain activity because she does not have a clear daily structure. The career women might have to travel frequently and spontaneously across the continent whereas the housewife takes care of her kids and drives them to football, cricket and piano lessons. All this make their schedule chaotic and prevents them from developing a routine for any sports activity. Therefore, these activities need to be flexible and individually tailored towards her. Although many sports are very traditional and hence conservative, many new activities especially in the fitness sector have developed recently that are less regulated, more dynamic and put fun in the centre of focus goal rather than competition.

This development must be further explored in terms of how people receive this change and react to new trends. In this context, can influencers and ambassadors communicate these new themes of sports and inform potential consumers about the change that sport is undergoing? Additionally, how is new technology and new media such as social networks and fitness apps playing into this? As stated earlier, Nike offer a great selection of mobile apps and other online services that are customised to their customers' needs and make them engage with the brand.

The world of online users in enormous, hence investigating how these users engage with fitness trends online can shed light on their behaviour and preferences and by taking corresponding actions, open a whole new market that can be turned into participation of those users.

What's Next ?

Change in demand

Conversely, how can the sport industry as a whole respond to the changing demands of the consumer? One of the problems that sport is facing nowadays is that people have a huge range of opportunities what to do in their leisure. Especially streaming platforms such as Netflix and Amazon constitute a dangerous threat to sport since they encourage the lazy part of the population to be even lazier. Naturally, watching a series on your couch is more comfortable than getting changed and going for a run. The challenge becomes now to raise the awareness in those people that being active is essential for mind and body to stay healthy. Does education have an impact in this process, can this impact be enhanced and can the community take on a more responsible role in bringing people to sport?

However as stated earlier, for some people it might not be possible to engage in sport on a regular basis. Hence the question arises, instead of bringing people to sport, can sport be brought to them? This might be specifically applicable for the part of the population that spends most of their time at work and only have a restricted amount of free time. Especially the career woman who is also a mother dedicates this limited time rather to her family then spends it at the gym. Therefore, sport can be brought to the women at workplace. Here, the companies come into play; every company must understand its responsibility in terms on keeping its employees fit and healthy. Hence, sporting activities have to be incorporated into the daily work life. For this however to be accepted by every business, the positive effects of workplace fitness must be clearly communicated in order to raise awareness that such activities reduce stress, enhance the performance at work and contribute to a better working climate. Hence, future studies should investigate how workplace health activities can be implemented most effectively and aim for making the concept appealing across Britain.

What's Next ?

Upscaling community sport

Community sport that offer activities to a certain part of the community in a specific area exist all over the country, but everyone is fighting its own battle. Thus, the question arises if it would be more efficient to upscale those initiatives. For that matter, do the activities that already exist locally represent the demands of their communities and by analysing them, can these findings be broadened and made applicable to a bigger society? Once this has been identified, what is the most efficient way of implementing it? Are franchises the ultimate solution? And which influencers can drive this process and shape it successfully? Furthermore, in order to promote community sports and get more people interested, does it make sense to offer a certain incentive for participation in sport?

Conclusion

The present report described the collaborative working between Loughborough University London and Sport England through a sandpit activity, conducted on the 29th January 2018, where recommendations and next steps have been scoped, trying to discuss and map out the barriers/challenges to making exercise a regular part of the fairly active group of women daily life.

The sandpit used the methodology of creating personas through different groups of discussion, which can help Sport England to better understand their targets and to develop their marketing strategies. From these Personas, some key themes have emerged and from them, the main research areas for future could be draw: Creation of a sense of belonging; Upscaling Community Sport and Change in the demand (necessity of flexible and individually tailored activities for career women and housewife and raising the awareness of the interdependence between health and active life style).

Finally, the report provides some important reflections. Overall, Sport England should push these reflections further in order to cope with the challenges of getting more women regularly and meaningfully engaged in sport and physical activity.