

TRACKING THE FIELD

News from the Ipsos MORI Sports Research Unit

A person is running on a blue track with white lane markings. The person is wearing olive green shorts and white sneakers. The background shows a city skyline under a blue sky with clouds. The track has a circular pattern in the distance.

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Whose opinion counts? – 360° research

*The Sponsorship Sphere – Looking Beyond
Basic Evaluation*

Welcome...

... to the second edition of Tracking the Field – the Ipsos MORI Sports Research Unit's newsletter.

We have been busy since the last edition, with new high profile projects and developments with key organisations across the sector. We also have new faces in our team and a range of exciting opportunities.

We have conducted the largest ever survey of participation in sport and active recreation – the Active People Survey, on behalf of Sport England. You can find out more about this project on pages 3-5, and the innovative analysis and reporting tool developed to disseminate the results – Active People Diagnostic. Increasing participation is a key objective in the lead up to the London 2012 Olympic Games and Paralympic Games. Indeed, these Games present many of us within the sports sector with new challenges and along the road to London, the need for a robust evidence-base to support adequate strategies and initiatives will become increasingly apparent.

Over the following few pages we provide an overview of some of the different research and engagement solutions we offer, drawing directly on our clients' experiences to show the benefits that well designed and conducted research can bring to organisations.

We hope you enjoy this new edition of Tracking the Field and find it useful and informative - please contact the team if you have any queries or comments.

Jen Fraser
Head of Sports Research , Ipsos MORI

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Moving towards a healthier nation

Active People – helping you to take the next step

The sports industry has long lacked a comprehensive and robust measure of participation in sport and active recreation. That's not to say there haven't been useful indicators – the General Household Survey and the Health Survey for England both provided measures of physical activity. However, what the industry needed was a measure designed specifically for sport, one that would overcome the obstacles presented by other existing measures. The launch of the Active People Survey (conducted by Ipsos MORI on behalf of Sport England) and the subsequent development of Active People Diagnostic have set the wheels of change in motion. Never before has such a large scale survey of participation or one that provides such a depth of information been undertaken.

The Active People Survey

A total of 363,724 adults living in England took part in the first Active People Survey, a minimum of 1,000 in every local authority.

The Survey gathers data on the type, duration and intensity of participation in different types of sport and active recreation, as well as information about volunteering, membership of sports clubs, receipt of sports coaching, participation in competitive sport and satisfaction with local sports provision. This information is for enabling different organisations to measure their performance against targets for several key performance indicators, including sports contribution to the cultural block (*The percentage of the adult population participating in at least 30 minutes of sport and active recreation (including walking and cycling) of at least moderate intensity on at least 3 occasions a week*).

Active People Diagnostic is a password-protected site with access for registered users only. If you would like to register for Active People Diagnostic, visit

<http://www.webreport.se/apd/login.aspx>

Once you have completed the registration form, you will be automatically sent an email with a password and link to the site.

Active People Diagnostic

If you haven't yet registered to access Active People Diagnostic we strongly recommend that you do so. Active People Diagnostic is one of the most sophisticated online analysis and reporting tools ever to have been developed for research purposes.

In developing such a user-friendly tool Ipsos MORI and Sport England have involved end-users throughout the process, from the evolution of the concept of Active People Diagnostic, right through to testing the site.

For the first time ever Active People Diagnostic is now available for anyone to self-register to access. Anyone can interrogate results from the survey at numerous geographical levels (Local Authority, County Council, Primary Care Trust, County Sport Partnership, Sport England Region and Nationally), as well as being able to break down these results by a huge and varied number of socio-demographic variables and survey questions and results. Additionally, users can compare their results with other areas of sports and build respondent profiles on which they can run their own analysis.

Active People Diagnostic is structured

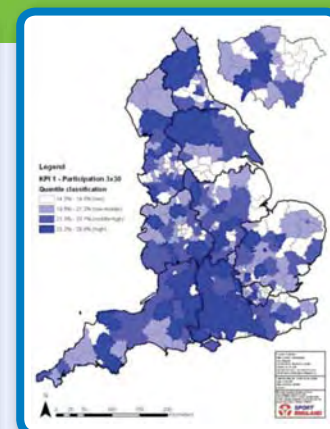
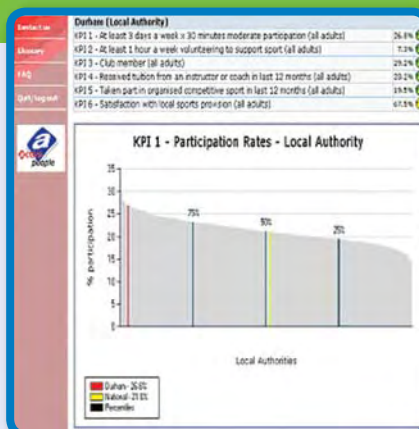
TIER ONE

Key Performance Indicators

Here you can access the six key performance indicator results at key levels (any LA, CC, PCT, CSP, region or nationally). Each of these results is also broken down by socio-demographic priority groups. You can choose to look at the KPI results within a table, via maps and through distribution charts.

21% of the adult population participate in moderate intensity sport and active recreation for at least 30 minutes on at least 3 days per week. Boston has the lowest proportion of adults who meet the participation threshold at 14%.

Analysis has also been completed which models participation rates at middle layer super output area (MSOA) "Synthetic" estimates of the 3x30 participation measure have been produced for all Middle Layer Super Output Areas (MSOA). For more information and to view the map outputs and background information to the small area estimate maps, please visit the Sport England website.



Sports results

Here you can access pre-defined national sports results for National Governing Bodies of Sport (NGBs) and individual sports where the number of respondents are at least 30 or above.

45% of the adult population has undertaken at least one sport or active recreation in last four weeks (excluding walking and cycling). Men are significantly more likely than women to have done so (49% vs. 40%).

TOP TEN

SPORTS AND RECREATIONAL ACTIVITIES

- ▶ Recreational walking (mod intensity 30+ mins)
- ▶ Swimming (all)
- ▶ Gym (incl. exercise bikes/rowing machines)
- ▶ Recreational cycling (mod intensity 30 + mins)
- ▶ Football (all)
- ▶ Running/jogging
- ▶ Golf/Pitch and Putt/Putting
- ▶ Badminton
- ▶ Tennis
- ▶ Aerobics

TIER TWO

Other Performance Indicators

Here you can access a range of other PIs e.g. the proportion of adults doing zero days of 30 minutes moderate intensity sport and active recreation.

51% of the adult population do zero days of moderate intensity sport and active recreation for at least 30 minutes. Women are more likely than men to have participated for zero days (55% women compared with 46% men).



around five key tiers:

TIER THREE

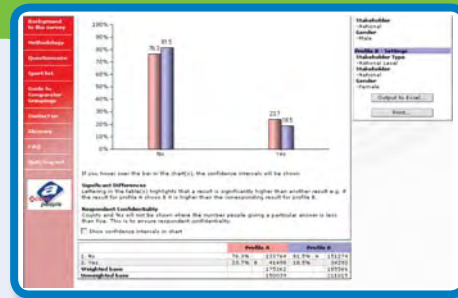
Interactive Analysis

Here you can build profiles of respondents and compare their results (profile analysis). For example, you could choose to run a profile analysis comparing the result for KPI 1 (3x30) for male swimmers aged 16-24 compared with female swimmers aged 16-24.

In South Bedfordshire County Sport Partnership (CSP), a higher proportion of men aged 16-19 (40%) than women aged 16-19 (27%) have taken part in organised competitive sport in the last 12 months.

In Birmingham men of non-white ethnic origin are significantly more likely than women of non-white ethnic origin to participate in moderate intensity sport and active recreation for at least three days a week and for at least 30 minutes each time (19% men compared with 10% women).

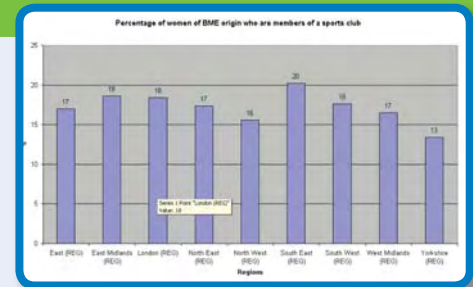
In addition, you can also run your own cross tabulations, running survey results by a multitude of breakdown variables and also filtering the base on a wide range of sub-groups.



TIER FOUR

Comparative Analysis

At this tier you can compare results with other geographies or other sports. For example, you could compare the result for club membership for women of BME origin across all nine regions.



TIER FIVE

Participation Modelling

At this tier you can see the expected participation rates in sport and active recreation for all local authorities compared to the actual participation rates (as measured in the survey). The modelling is based on a regression model determining the main economic and demographic factors that influence sport participation (this work was carried out by Sheffield Hallam University). It takes into account a wide range of economic and demographic variables outside the control of local authorities such as income, age, profession, and family structure.

The proportion of the adult population participating in at least 30 minutes of sport and active recreation (including walking and cycling) of at least moderate intensity on at least 3 occasions a week in Lambeth is greater than the expected rate of participation (actual participation for KPI 1 is 26% compared with an expected participation of 21%).

TAKING THE NEXT STEP

Active People Diagnostic is already being used by more than 3,000 stakeholders to help increase levels of participation amongst adults aged 16+ in England. Rather than just present the results Active People Diagnostic is facilitating decision-making right down to the local level by helping stakeholders to diagnose where the problems lie, to ask questions and to suggest possible answers – which groups are the least likely to participate in sport and active recreation? What are their characteristics? What types of people are falling just below the 3x30 threshold and what sports are they currently participating in?

For Active People this is really just the beginning. The next step is for local sport and leisure practitioners to delve deeper into the data, to combine it with other sources such as the data from the Taking Part Survey and the facilities

information available through Active Places. Active People Diagnostic provides the industry with the eyes to see who participates and who does not. The next step will be to understand why this is the case.

Now is time for the sport and market research industries to work collaboratively to get to the bottom of these key issues. Only through more in-depth studies can we hopefully understand the physical, psychological and social barriers that exist (either for real or in one's self perpetuated belief that these barriers exist).

If you would like further information about Active People please get in touch with Jen Fraser (Head of Sports Research) on 020 7347 3012 or at jen.fraser@ipsos-mori.com



SPORTS RESEARCH:

The Ipsos MORI Sports Research Unit has a strong reputation within the sports sector, bringing expertise to several key areas of research. We have experience of working with many key organisations, including Sport England, UK Sport, sports coach UK, NGBs such as the F.A and the R.F.U and Local Authorities across the country. A robust evidence-base is essential for the success of any organisation and sport is no different. Ipsos MORI has a wealth of experience on offer to our clients: below is just a taster...

VISITOR RESEARCH

Ipsos MORI regularly conducts visitor research, not only at sports and recreation facilities, but at a variety of museums and galleries. Methodologies employed include:

- Face-to-face onsite research using the latest hand-held computer technologies enabling fast turnaround of data and instant switching to foreign language versions of the questionnaire.
- Post event research, both through traditional paper based methodologies or increasingly online.

Visitor research at sports venues not only enables teams, clubs and venue management to **know** their customers, but also tells you how you are **performing** in the eyes of your customers. Visitor/spectator research can be used to investigate a wide range of issues such as visitor satisfaction, expectations, motivations to visit, likelihood to return and so on. This type of research has many benefits, but is particular useful for generating information and ideas to support the development and direction of marketing communications and to understand what would encourage more people to visit/spectate.

Are You Staying Ahead Of The Game?

FANBASE RESEARCH

Ipsos MORI has researched the fanbases of several sports clubs/teams, through on-site activities, online, paper, and telephone methodologies. Large scale projects can make use of Ipsos MORI's International Omnibus, or use the dedicated International CATI Centre based in London.

Understanding the size of a club or team's fanbase serves several purposes – but crucially in the modern sports environment it can enable the club's management to make important decisions about marketing. It enables the club to facilitate the development of relationships/partnerships with sponsors. Such research not only covers...

- Measuring level of awareness
- Measuring popularity and support

But crucially...

- Aims to build an understanding the **nature of support** and the **degree of loyalty** to the club or team in question
- Provides clubs and teams with the information to drive up the number of fans, to sustain loyalty and to increase revenues

PARTICIPATION RESEARCH

Participation research is a key strength at Ipsos MORI, having completed the Active People Survey on behalf of Sport England. This telephone survey of 363,724 adults was the largest ever survey of sport and active recreation to be undertaken in Europe.

Participation research can be of value to a broad range of organisations. Essentially it allows holders of such data to **assess** levels and patterns of sport and active recreation in their area or sport, and to **benchmark and profile** performance. This type of information is very powerful in terms of local **strategic planning** for local authorities, county councils, County Sport Partnerships, National Governing Bodies, and other national and regional partners, especially with the London 2012 Olympic Games and Paralympic Games only just around the corner.

STAKEHOLDER RESEARCH

The Ipsos MORI Sports Research Unit has conducted Stakeholder research with the F.A, PFA, and R.F.U amongst others. Stakeholder research varies in its scale and complexity depending on the specific requirements of the client – usually it entails a mixture of quantitative and qualitative methodologies, including, for example, focus groups, depth interviews, deliberative workshops, and surveys.

Stakeholder research enables those who are involved to have their say in the core issues facing them and the activity they are involved in. This is particularly important when the industry or a sport needs or seeks to make significant changes i.e. structural changes, regulatory changes, developmental changes but also when it is necessary to devise a new or re-focus an existing strategy.

PROGRAMME EVALUATION

Ipsos MORI has been involved in evaluations for many high profile programmes and initiatives across various sectors and brings this wider experience to the sports research field. We recently conducted a national impact study for the Sport England Sport Action Zones Programme through firstly survey-based research, but then a qualitative follow-up research programme.

Evaluation and impact studies are intrinsic to funding programmes and are essential in discovering what worked, what didn't and crucially, **why**. Evaluation studies invariably require the research to adopt both qualitative methodologies in order to explore the programme in-depth and quantitative methodologies to facilitate the collection of robust data to report on any measurable outcomes of and opinions about these programmes or initiatives.

If you would like to discuss any of the above in more depth, or indeed tailor something specific to your needs, please get in touch with a member of the Ipsos MORI Sports Research team.

Getting you to the front of the grid



The popularity of motorsports in this country is growing and with the limelight moving swiftly onto our new young talent in the form of Lewis Hamilton, we should expect this level of interest to increase. But the world of motorsports consists of much more than just F1 and it is equally important to recognise other events on the motor sport calendar – British Superbikes, F3 and GT championship, A1 Grand Prix, Britcar, LMES, MotoGP and so on.

But what do we know about the people that come to watch these events: the spectators, the enthusiasts, the motor sport participants? What is it that attracts people to go to our race tracks? What will keep them coming back for more?

Is the industry cashing in? Is enough being done to ensure spectator numbers are maximised via improvements to the visitor experience, effective promotion and communications, sustainable loyalty and identification of alternative markets and the next generation of motor sport fans? A report by Mintel (Feb 2007) suggests not, as only three of the six top UK race circuits are actually making a profit.

Carefully planned and designed market research is vital. It can help to draw in higher revenues, increase spectator numbers, improve the quality of services and enhance your reputation amongst all key stakeholders. So how can we help?

Spectator Research – how well do you know your visitors?

Why do you need to understand your visitors? Well, in a nutshell, if you don't you can only really rely on those that are satisfied and content enough to keep coming back. If you want to attract more people to come and watch motor sport events then there is every reason to know more about them. Only by having this knowledge can you market appropriately to different audiences and ensure that you provide the appropriate levels of services.

Increased visitor numbers will generate increased revenues, but a one size fits all approach to marketing is unlikely to be effective. Research can help you to identify the following types of information which clients in similar sectors (i.e. leisure attractions) use on a regular basis to monitor their visitors and to facilitate the development of appropriate marketing and communication materials.

- ▶ Who visits? – detailed profiles of your visitors
- ▶ Motivations and reasons for visiting events/tracks
- ▶ Sources of information – are particular marketing channels more effective amongst particular target audiences?
- ▶ Visitor expectations and satisfaction – are your visitors having a good experience?
- ▶ Likelihood to return to the event/track and likelihood to recommend – bad word of mouth is dangerous so it is important to know who are your advocates and who are not and why
- ▶ Ticketing – how do visitors purchase their tickets? Price sensitivity? Advance ticket purchasing and different modes of ticket purchasing e.g. online, telephone
- ▶ Level of expenditure during visit – which fee based facilities are visitors most likely to use
- ▶ Experience of different visitor facilities at the track
- ▶ Sponsors - awareness of sponsors, associations with sponsors and impact on purchasing behaviour

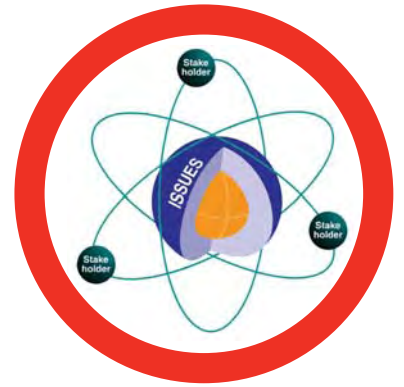
There are a number of techniques that can be used to gain such insight, including on-site visitor/spectator surveys, mailed out self-completion pre and post-event surveys and on-line surveys.

Driving Experience Research – widening accessibility

Many tracks offer the opportunity for people to purchase driver experiences. Tailored research can help operators to understand more about the types of people who typically purchase them, the reasons for doing so, their perceptions of their experience and what would make it better. Having this knowledge to hand can facilitate the future programming and content of experiences to maximise repeat and multiple purchases and potentially widen the market. This will ultimately lead to an increase in your market share as well as helping to facilitate the marketing of your driving experience products.

For more information about our motor sport visitor/spectator survey products, please contact Jen Fraser (Head of Sports Research) on 020 7347 3012, at jen.fraser@ipsos-mori.com or Steve Spicer on 020 7347 3473, steve.spicer@ipsos-mori.com

Whose opinion counts? 360° research



The sports industry is big business, and involves an array of stakeholders – players, spectators, investors, sponsors, managers, coaches and many more. Like all other businesses, sport must evolve and keep up with the changing tides of time.

There are times when significant changes to the way that a sport is managed or structured are necessary. The nature of the change will vary i.e. structural changes to National Governing Bodies (NGBs), the introduction of a new system of coach education and development or perhaps a need to change the focus of financial priorities of the NGB. The type of change or development being pursued by the sport(s) will also vary in its different effects on different stakeholders.

“It would have to be comprehensive - including everyone within the game at a professional and amateur level, players and supporters, old and young, male and female. Those with a life long interest in rugby through to those with little interest in the sport. The research would provide foundations for future planning of the game and help the sport understand what is needed to make an impact and a difference - particularly at the community level.”

James Hill

Corporate Marketing Director, Zurich

Experience has taught us that the best planned change is invariably supported by a carefully planned and executed programme of consultation that effectively feeds into the decision-making process. This goes far beyond simply gauging whether different stakeholders support or oppose proposals, it's also about understanding and gaining a different perspective of how the change might work, what the outcomes might be and the consequences for different stakeholders.

Ipsos MORI has extensive experience of ensuring stakeholders' input is effectively sought and integrated into the decision-making process, with successful results -both the F.A. and Zurich have commissioned significant stakeholder studies which have contributed to a better understanding of relevant stakeholders' views and opinions about issues relating to both sports.

Likewise, Zurich the then sponsor of the R.F.U Premiership commissioned Ipsos MORI to work with them and the R.F.U to devise a research approach that could utilise the strength of the sport at the elite level to reverse a long-term trend of declining participation within the community game. Findings from the research fed into the R.F.U's action plan Making an Impact which is being used to help shape the strategic direction of the sport.

But it's not just the big guns that should be thinking about stakeholder consultation – any organisation, no matter how big or small should seriously consider undertaking research of this type when they are faced with making changes or refining their priorities. Stakeholder research is varied and here at Ipsos MORI we do not believe in a one size fits all approach – we tailor the research to meet specific needs.

“The strength of this work lies in the fact that it has been carried out on an entirely independent basis by the respected agency Ipsos MORI, and that it has covered the widest possible range of opinion. The results of the survey help to give us a focus for future priorities, and to promote informed debate about how we take the game forward.”

Adam Crozier

Former F.A. CEO

If you would like further information about our stakeholder research, please get in touch with Jen Fraser (Head of Sports Research) on 020 7347 3012 or at jen.fraser@ipsos-mori.com or Martin Kane on 020 7347 3364 or at martin.kane@ipsos-mori.com

The Sponsorship Sphere

Looking Beyond Basic Evaluation

Sponsorship is one of the fastest growing areas of marketing as brands strive for innovative ways to communicate with their target markets. As the industry continues to go from strength to strength - IEG estimated the global size of the sponsorship market grew by over 10% last year and Ipsos MORI's Sportskan estimated the UK sports market grew by over 5% - it is essential sponsors adopt appropriate methods to evaluate impact against the wide variety of objectives a sponsorship can be designed to meet.

Traditional methods of media valuation and sponsorship awareness research are not sufficient to fully measure the impact of a sponsorship, when objectives extend beyond awareness to the development of customer loyalty, corporate reputation and employee relations.

Ipsos MORI's Simon Lincoln explains how a 360° approach to evaluation across five key areas is essential:

Corporate Reputation

Developing a good reputation can take time but is ultimately invaluable. Brands need to build a reservoir of goodwill to allow them to bounce back from inevitable ups and downs that hit all organisations. Sponsorship is a key tool in building corporate reputation - for instance Southern Water's 'Learn to Swim' scheme - and its impact can be measured among a variety of key stakeholders; consumers, opinion formers (notably, the media), business leaders, MPs and the financial community.

Customer Loyalty

Loyalty assessment should be a key part of most sponsorship research programmes; to what extent are initiatives such as priority access to events and discounted services impacting upon customer loyalty and how could they generate a better return.

Employee Research

Employees are vital to the success of a sponsorship. A full understanding of employees awareness and attitudes towards sponsorship activities will lead to greater alignment to brand strategy and benefits to employee motivation and retention.

Media / PR Tracking

PR is vital to the success of a sponsorship deal, as is monitoring how brand perceptions shift in relation to the volume and slant of particular stories over time. By understanding this link between opinion and PR, brands / agencies can adapt their media strategy to maximise sponsorship impact.

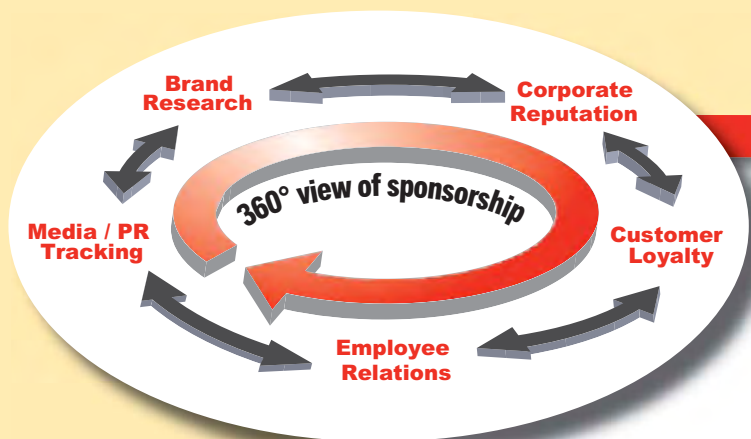




Finally, Brand Research...

Assesses the impact a sponsorship has had on brand objectives, whether it be sponsorship awareness, brand salience, brand equity, image and consideration. By modelling survey data against sales data, the impact on the bottom line can be quantified.

It is only by adopting such a holistic 360° approach, that the true impact of a sponsorship can be understood and managed for business benefit.



Recently one of our clients undertook an engaging sponsorship related activation that required consumers to actively interact with the brand, the results of which were of benefit to third party organisations.

The results of the research showed that attitudes towards the activation were very positive and among those aware of the activation, perceptions of the brand were significantly enhanced.

Despite this, because the activation was very 'niche', awareness was low. Ipsos MORI's recommendation was to expand the scope of the activation, broadening its reach and its interaction with the brand, thereby maximising the potential impact.

Another key finding from this piece of research arose when the media value generated by the sponsorship was compared to the spontaneous association the sponsor generated with their property. The result of which showed the media value generated by the sponsorship increased throughout the period of research, while the spontaneous association figure decreased - the implications being association with the property was dependent on more than just pure media exposure.

For more information about our sports sponsorship research service, please contact Simon Lincoln on 020 8861 8137 or at simon.lincoln@ipsos-mori.com



Contact

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UNDERSTANDING ATTRACTIONS NEWSLETTER



Our latest newsletter from the leisure team, with articles about our syndicated attractions website survey and 10 years of Blair: A golden age for culture?

For more information or to obtain a copy, please contact Jenny McNeill on 020 7347 3013 or at jenny.mcneill@ipsos-mori.com or you can download at www.ipsos-mori.com/publications/newsletters/



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