

Active Adults Survey

2014

State of the Nation

Headline findings

- 41% of adults are hooked on sport in 2014, and took part in sport three or more times a week, compared with 39% in 2012.
- There remains a gender gap in participation levels with 46% of males hooked on sport compared with 35% of females. The equivalent figures in 2012 were 46% of males and 32% of females.
- Age, gender, disability and income level all have an impact on participation rates – although where you live plays less of a part. Participation levels are similar across the four regions of Central South, Mid and West Wales, North Wales and South East Wales.
- Irrespective of region, Welsh speakers are more likely to be hooked on sport than non-Welsh speakers – 45% compared with 39%.
- Adults in Wales are most likely to be taking part in walking (2 or more miles), exercise and fitness activities, swimming, running and cycling. Football for males and dance for females are also popular activities.
- 27% of adults are a member of a sports club, showing no change from 2012. Males are more likely to be members (33% compared with 21% of females) and again this difference shows virtually no real change from 2012, when the figures were 34% and 20%.
- 9% of adults volunteer in sport (10% in 2012) – equating to a workforce of 235,000 individuals. On average, volunteers give 10 hours of their time per month, compared with 8 hours in 2012.
- 72% of all adults would like to do more sport or physical activity (73% of males and 71% of females). The types of activities in demand are similar to those that people are participating in most – such as cycling, swimming and exercise and fitness activities. Football, and pursuits such as canoeing/kayaking, climbing, target shooting and fishing/angling are also sports males would like to do more of, while females report a preference for dance and athletics/running.

Introduction

The Active Adults Survey 2014 is the latest in a series of large-scale population based surveys of adult sport participation in Wales that have been commissioned by the Sports Council for Wales (Sport Wales) since 1987. The Active Adults Survey takes the form of a biennial household survey which measures levels of sports participation, club membership and volunteering in addition to lifestyle, health and other sport related behaviours amongst adults in Wales.

Our Vision sets out clear priorities for sport in Wales. We want a Wales where **every child is hooked on sport for life** and we have **a nation of champions**. The survey provides the main source of data used by Sport Wales to strategically monitor and track trends in sport in Wales, as well as forming a base from which to shape policy and practice.

The methodology and scale of the Active Adults Survey has developed and expanded over the three decades that it has been conducted:

- Initially, between 1987 and 1998, six waves of the survey were undertaken on Beaufort Research's Wales Omnibus Survey. For each wave of the survey, fieldwork took place in four batches of approximately 1,000 interviews spread across the year.
- From 1998 onwards, Sport Wales commissioned a bespoke survey. The four surveys conducted from 1998-2005 were based on a quota sampling method whereby participants were recruited until quotas, chosen to reflect the demographic profile of the Welsh population, were filled. Fieldwork took place over 12 months, with equal numbers of interviews in each month and Local Authority (LA) area.
- The Active Adults Survey 2008-2009 was the first to use a random probability sample and its methodology was employed again in 2010 and 2012 (the year in which Ipsos MORI was first commissioned to conduct the survey). Ipsos MORI and GfK NOP were commissioned to undertake the survey again in 2014, using a comparable survey methodology.

The main body of the Active Adults questionnaire – the questions on sports participation in the four weeks prior to interview – has remained unchanged since the start of the survey series in 1987, although the activities included in

these questions have been updated to reflect the changes in participation patterns. Questions on sports club membership and participation have been included since 1989. A range of demographic information is also collected for analysis, including gender, social grade, age, disability and household structure. The Active Adults Survey therefore provides a wealth of tracking data on sports participation in Wales.

Method

In total, 8,156 adults in Wales were interviewed for the Survey between 29th January 2014 and 2nd March 2015. Interviews were spread evenly across survey period to account for the seasonal nature of sport participation. Interviews were also spread evenly across all LAs to allow regional analysis of sport participation.

The sample of adults was ultimately derived using the Postcode Address File which, given its accuracy and almost universal coverage of addresses, provides a comprehensive sampling frame for households in Wales. Following analysis of the 2012 data, the sample design was changed in 2014 from a clustered sample design to an un-clustered sample design. This approach delivered a substantially higher effective sample size than the equivalent-cost clustered sample.

Interviews were conducted face-to-face in participants' homes and lasted 25 minutes on average, as in 2012. The participant was always an adult (aged 15+) who had been randomly chosen from all adults in the household through a Kish grid selection.

Results

Results of the survey are presented in the following sections:

1. Sports Participation in Wales - the trend from 1987 to 2014
2. Hooked on sport – frequency of participation for:
 - Regions in Wales
 - Protected characteristics
3. Information to help us understand how people in Wales become active by considering:

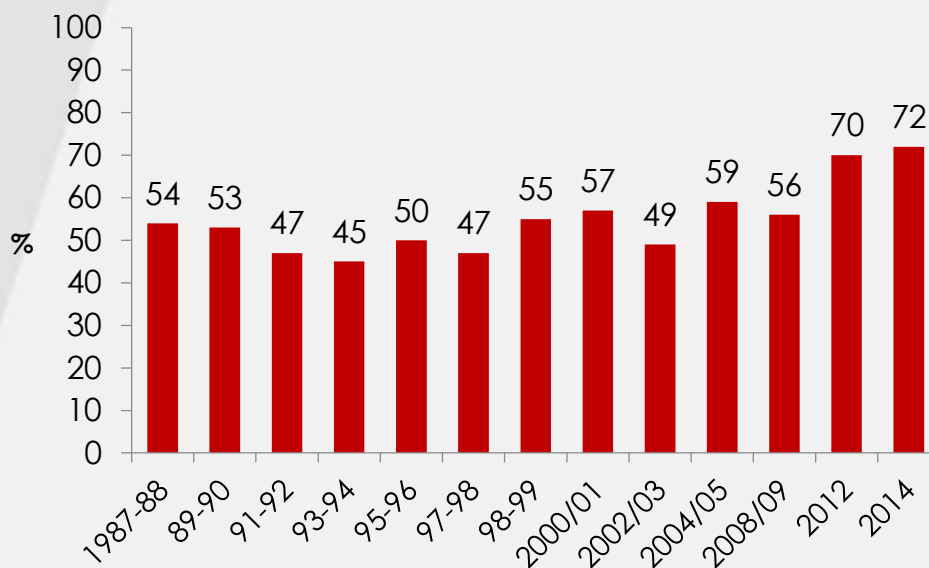
- motivation
- confidence
- awareness
- opportunities and resources
- the experience

Section 1: Sport in Wales – the long term trend

Sport Wales has monitored levels of sports participation in Wales since the 80s. For many years, the main measure reported was 'any participation in the last four weeks'. In 2014, 72% of adults reported that they had taken part in sport or physical recreation in the last four weeks, compared with 70% in 2012.

Figure 1 below shows the trend in participation levels (which remains relatively static) since the late 1980s.

Figure 1: Participation in sport (any participation in the previous four weeks)



Changes have been made to the inclusion of different activity types over the years, with new activities being included as direct prompts by the interviewer as they become prominent activities in society. The questionnaire always includes an option for respondents to include 'other' sports that may not appear on the list, and this provides a means of recording new trends in activity types and adjusting future questionnaires accordingly.

In the 1990s and early 2000s several changes were made to the list of sports and activities that respondents can record as 'participation'. For example, 'soccer' was changed to 'football' and 'road running' was added. Sports such as netball, football (including 5 aside), hockey and cricket were included as indoor options as well as an outdoor options, and activities such as touch and tag rugby were added in the list.

Up until 2008/09, the percentages shown above in Figure 1 excluded *darts*, *pool*, *skittles*, *ten pin bowling*, *disco dancing* and *exercise machines* partly due to not necessarily having a recognised governing body or some may have been considered 'pub sports'. These activities are now included in the survey as prompts, particularly due to the prevalence and relevance of the use of exercise machines as part of regular activity and training for sport.

Regardless of this change, and others across the years, this doesn't entirely explain the increase in participation in 2012 onwards. For example, including *darts*, *pool*, *skittles*, *ten pin bowling*, *disco dancing* and *exercise machines* in the 2008/09 measure only increases the overall percentage from 56% to 59%. There are relatively few people that *only* do one of these activities.

Section 2: Hooked on sport – Adults in Wales 2014

It is now recognised that in order to gain a health benefit, adults should undertake physical activity for a minimum of 150 minutes per week. The current recommendations from the Chief Medical Officer are that adults aged 19 to 64 and older adults aged 65+ should aim to be active daily. Over a week, activity should add up to at least 150 minutes of moderate intensity activity in bouts of 10 minutes or more. Adults should also undertake physical activity to improve muscle strength on at least two days a week.

Sport and physical recreation can make a substantial contribution to activity levels. Over the last few years, Sport Wales has monitored how often people in Wales are participating and which groups are more or less likely to be **frequently active** by taking part in sport and physical recreation. Sport Wales does not capture the duration of activity levels (this is included in the Welsh Health Survey) but explores the number of occasions of activity over a four week period to see whether people in Wales are 'hooked on sport'.

What do we mean by 'hooked on sport'? For adults, we classify someone as being hooked on sport if they take part on average three or more occasions a week in sport or physical recreation.

41% of adults aged 15+ in Wales are hooked on sport compared with 39% in 2012. When accounting for the survey design (using confidence intervals) there has been no recognised change in participation levels since 2012. Figure 2 shows comparative data for 2012 and 2014 by age and gender.

Figure 2: Percentage of adults in Wales who are hooked on sport

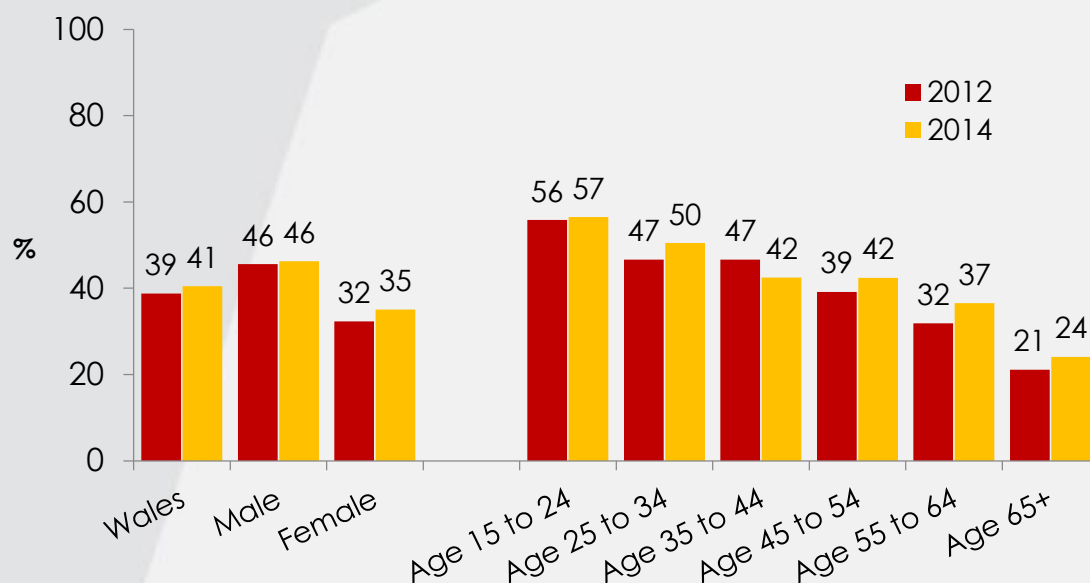


Figure 3 shows frequency of participation from 2012 to 2014. The percentages of adults and frequency of participation remains almost the same from 2012 to 2014.

Figure 3: Participation on sport and physical activity – number of occasions per week

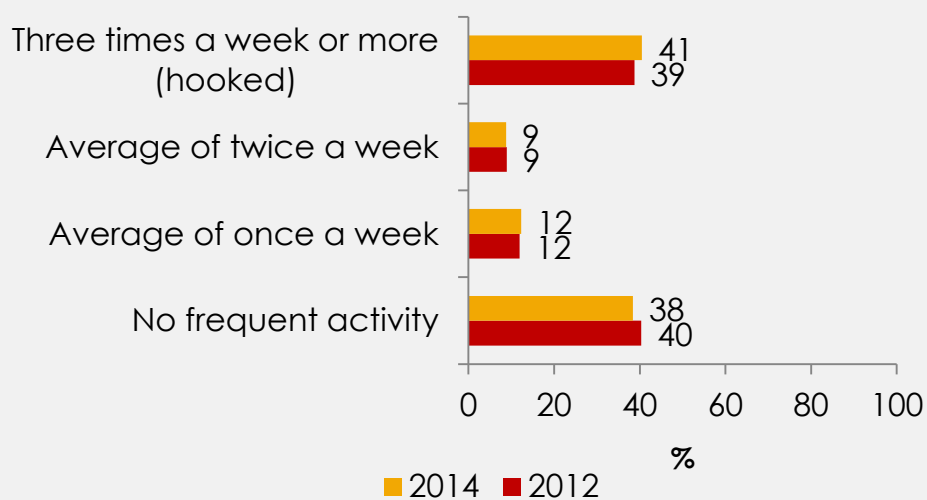
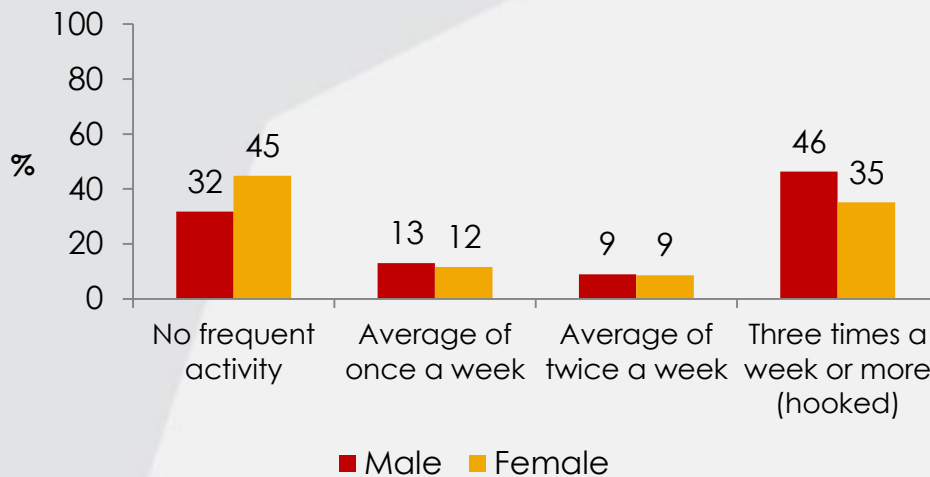


Figure 4 shows the frequency of participation for males and females.

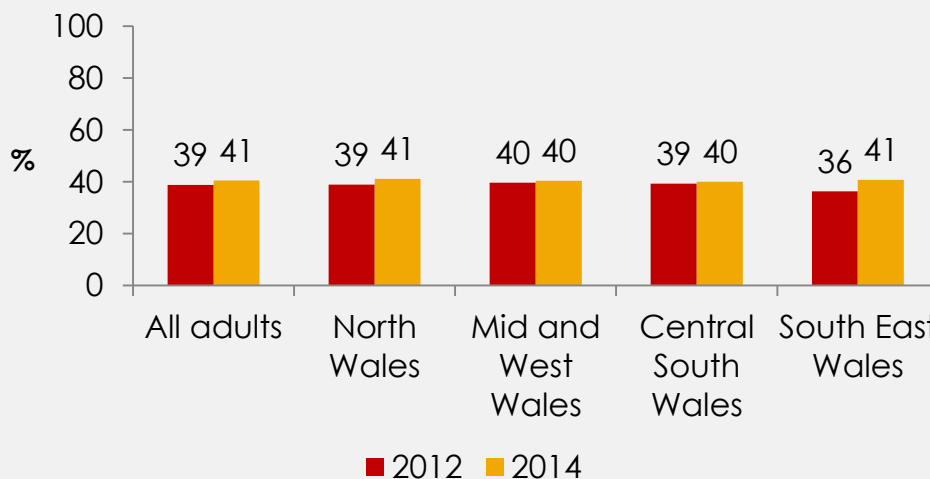
Figure 4: Participation on sport and physical activity in 2014 – number of occasions per week by gender



The long term trend has been that males are more likely to participate in sport than females. They are also more likely to participate more frequently, with 45% taking part in sport and physical activity three or more times a week compared with 35% of females. The reverse is true when looking at gender differences for adults who do no frequent activity – less than one occasion a week on average. Similar proportions of males and females take part once or twice a week and there has been no change in the proportion of adults who do so since 2012.

Figure 5 shows hooked on sport rates according to geographical regions of Wales.

Figure 5: Hooked on sport by region 2012 and 2014



Across Wales, there is little difference in the frequency of participation according to region.

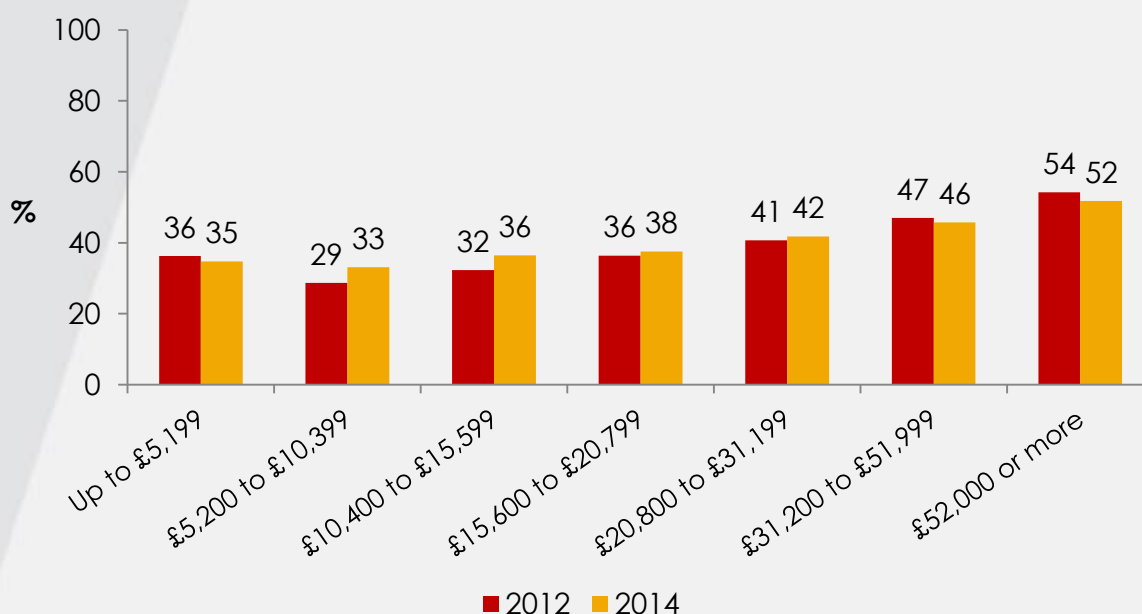
Hooked on sport and disability

29% of adults who reported having a long-term illness, health problem or disability were hooked on sport and took part on three or more occasions a week, compared with 48% of adults with no disability. For disabled adults, 29% also were hooked on sport in 2012, compared with 45% of non-disabled adults. Less than half (44%) of respondents in the sample reported a Long-term illness, health problem, a similar proportion to that in 2012 (42%).

Hooked on sport and income

Figure 6 shows the relationship between frequency of participation in sport and income level. As income level increases, the percentage of adults who are hooked on sport and take part three or more times a week also increases.

Figure 6: Percentage of adults who are hooked on sport and income level



Welsh speakers

Welsh speakers are more likely to be hooked on sport than non-Welsh speakers – 45% compared with 39%. Similar patterns have been seen for both students in the 2015 Further Education Sport Survey and young people in the 2015 School Sports Survey.

These patterns of participation according to individual characteristics have seen little change for adults since we have been collecting this information. Section 3 below considers some of the data from the survey that can help us to understand why people may, or may not, be taking part.

Section 3: Understanding how people become active

The Active Adults Survey provides information that, combined with other research and evidence, can help us to understand why people may or may not be active. Various pieces of data from the survey help us to consider the following areas:

- motivation
- confidence
- awareness
- opportunities & resources
- the experience

Motivation

Almost three quarters (72%) of all adults would like to do more sport or physical activity (73% of males and 71% of females). In 2012, 65% of adults said they would like to do more (66% of males and 64% of females).

This data is referred to by the sports sector as 'latent demand' and is measured by recording the percentage of adults who gave a positive answer to the following interviewer question:

“Thinking about all the sports and physical activities that we have talked about today, are there any that you are not currently doing but you would like to do, or any that you would like to do more of?”

A prompt list of the various activities already discussed is provided.

The types of activities in demand are similar to those that people are participating in most – such as cycling, swimming and exercise and fitness activities. Football, and pursuits such as canoeing/kayaking, climbing, target shooting and fishing/angling are also sports males would like to do more of, while females report a preference for dance and athletics/running.

Table 1 shows the demand for various activity types according to gender.

Table 1: Percentage of adults reporting a latent demand for sports and activities

Males	% indicating a demand	Females	% indicating a demand
Cycling (any type)	16	Exercise and fitness	26
Swimming	16	Swimming	25
Exercise and fitness	14	Cycling (any type)	10
Canoeing/ Kayaking	9	Athletics/running	9
Football	9	Dance (any type)	9
Fishing /Angling	9	Walking 2 or more miles	8

Confidence

Previous analysis of Sport Wales survey data (for young people and adults) has shown that confidence and perceived lack of ability can be a barrier to taking part. Reasons for not participating in sport and physical activity include having a disability, illness or injury that prevents participation, not being confident and not being fit enough. In addition, respondents who expressed any latent demand were asked what would encourage them to do more. Again, issues such as 'If I was fitter' (18% of adults who had a latent demand) and 'If I had someone to go with (15%) 'If I was more confident' (7%) were issues that relate to confidence and motivation.

Awareness

While there is limited data within the survey on people's awareness of where, how and when opportunities are available for them to take part, insight from qualitative research indicates how important it is - if you don't know about the opportunity – there is no way to take advantage of opportunities that exist. Adults may also be aware of an opportunity but not be able to access it for logistical reasons or because they perceive it is not for them.

Opportunities and resources

Table 2 shows the opportunities that adults in Wales are most likely to be accessing. The kinds of activities that adults are most likely to take part in have shown little change over time – walking, cycling, swimming remain popular. There is no real change to report compared with 2012.

Table 2: Most popular activities – percentage and number of adults

Top Activities	Participation rate	Number of Adults aged 15+
Walking (over 2 miles)	47%	1,208,000
Exercise and fitness	21%	542,000
Swimming	15%	400,000
Running	14%	351,000
Cycling	12%	302,000
Weight Training	11%	287,000
Other sport activities		
Football (including futsal)	8%	212,000
Golf (including pitch & putt)	4%	90,000
Rugby	3%	70,000
Badminton	2%	57,000
Table tennis	2%	46,000
Tennis	2%	41,000
Climbing activities	1%	34,000
Canoeing or kayaking	1%	34,000
Athletics	1%	28,000
Basketball	1%	28,000
Netball	1%	21,000
Boxing	1%	21,000
Cricket	1%	18,000

Table 3 shows this information for males and females. Males and females are equally as likely to be taking part in exercise and fitness activities, such as going to the gym or taking part in classes. Higher percentages of males take part in cycling and football, while higher percentages of females take part in swimming and dance.

Table 3: Most popular activities by gender

Males			Females		
	% 2012	% 2014		% 2012	% 2014
Walking 2 or more miles	40	46	Walking 2 or more miles	43	48
Cycling (any, including BMX and mountain biking)	15	17	Exercise and fitness activity (and in brackets, including exercise machines)	20 (22)	17 (21)
Exercise and fitness activity (and in brackets, including exercise machines)	18 (22)	17 (21)	Swimming	18	17
Athletics/running (including 'jogging')	16	16	Athletics/running (including 'jogging')	11	11
Football	16	15	Cycling (any, including BMX and mountain biking)	6	6
Swimming	14	14	Dance (any)	5	2

Sports Club membership

Sports club membership statistics indicate the extent to which adults are accessing organised sports opportunities – perhaps a more formal offer than recreational participation. In 2014, 27% of adults are a member of a sports club (27% were also members in 2012). There is a gender gap in sports club membership – 33% of males are sports club members compared with 21% of females. The respective figures in 2012 were 34% and 20%. Again this difference shows no real change from 2012.

Sports club membership rates fall with age – 40% of 15-24 year olds are members decreasing to 18% for the 65+ age groups. Just over a quarter (26%) of adults aged between 35 and 54 are sport club members.

Leisure activities

In addition to sports participation, adults are asked about other leisure activities that they have taken part in over the last four weeks. Table 4 shows the results. It is worth noting that while there is a gender gap in terms of sports club membership, equal percentages of males and females (access leisure centres – just over a quarter of the population, a similar proportion to those accessing sports clubs overall. 26% had been to a leisure or fitness centre in 2014 and 27% in 2012.

Table 4: Percentage of adults taking part in leisure activities

	All adults %	Males %	Females %
Visited the countryside	52	55	50
Visited the seaside or coast	51	52	50
Visited a park or country park	40	40	40
Attended an arts event: a cinema, the theatre, ballet, opera, or a concert	33	30	36
Been to a leisure or fitness centre	26	26	26
Been to an amateur sporting event as a spectator	15	19	12
Been to a professional sporting event as a spectator	11	18	5

Volunteering

Volunteers play a key role in the delivery and support of opportunities – a valuable resource in the overall workforce delivering sport. By volunteering, we mean actively helping, on an unpaid volunteer basis, to run any sporting activity after school or at a club helping with things like administration, coaching, catering, transport etc.

In 2014, 9% of adults in Wales volunteered in sport in the previous year, compared with 10% in 2012. 10% percent of males volunteered compared with 9% of females.

Types of volunteering activity

Of these volunteers, most were likely to provide coaching (46%) followed by administration (30%), officiating and refereeing (20%), transport (18%), catering (14%), and stewarding (14%). Volunteers may have taken part in more than one of these activities.

There has been an increase in the average number of hours that adults provide as volunteers. On average, volunteers provided ten hours of their time a month in 2014, compared with eight hours in 2012.

Experience

Volunteers play a part in all elements of the cycle – acting as motivators, facilitators and supporting participation. They can help to create a good experience for participants and at the same time can benefit from the experience themselves.

44% of the existing volunteers were motivated to do more volunteering and reported yes to the question *'Do you ever feel that you would like to spend more time helping groups, clubs or organisations associated with sport?'* Additionally, 20% of adults who didn't currently volunteer were motivated to do more. Compared with non-volunteers, volunteers are more likely to give a positive response and say they are:

- Happy
- Satisfied with their physical health
- Satisfied with their work situation
- Satisfied with their life
- Feel that the things they do in their lives are worthwhile

This reflects findings from 2012 for adults who are hooked on sport and take part three or more times a week¹.

A person's experience of sport at school can affect their motivation to participate in sport or not throughout their lives. In 2014, 59% of adults said they enjoyed sport 'a lot' when they were at school. 22% enjoyed it 'a little' and 19% said 'not at all'. With research showing that enjoyment is linked to participation, 59% of adults also agreed that when they were at school, they had regularly taken part in sport outside of lesson time.

Conclusion

The 2014 Active Adults Survey shows that there has been a two percentage point increase in the percentage of adults who are hooked on sport since 2012, essentially showing little change. 41% take part on three or more occasions a week, sustaining the levels of activity seen in 2012. The known gaps in sports participation according to gender, disability and income level persist.

¹ http://sport.wales/media/1476430/sport_and_well-being.pdf

Further analysis of Active Adults Survey data is available on the Sport Wales website at <http://sport.wales/research--policy.aspx>

<http://sport.wales/ymchwil-a-pholisi.aspx?lang=cy&>

Note on Future surveys

From 2014, the National Survey, the Welsh Health Survey, the Arts in Wales Survey, the Welsh Outdoor Recreation Survey and the Active Adults Survey will be amalgamated into a single survey.

The new survey will be known as the National Survey for Wales. It will begin in 2016-17 and will involve a random sample of around 12,000 people across Wales each year, and be carried out face-to-face in people's homes. It will continue to provide the high-quality information needed by survey users, but more cost-effectively compared with continuing the current surveys. Further information on the approach can be found on the Welsh Government website.