

## Greater Norwich Needs Assessment:

### Needs Assessment 1: Sports and Physical Activity Profile

### Final Report

### Greater Norwich Area

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# Sports and Physical Activity Profile

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## Introduction

1. Sports and physical activity participation as well as serving a role in their own right are considered to be as important in being a main driver of creating a healthy and active lifestyle.
2. The purpose of producing this section on a sporting participation profile for the Greater Norwich area is to ensure participation is very much rooted in the determination of the development of the evidence base for the playing pitch strategy and the indoor facilities strategy. Understanding the sporting and physical activity participation profile for Greater Norwich is the fundamental context before developing the sports facilities evidence base.
3. We need to ensure that we do develop evidence for facility based on understanding who participates, how often, in what type of activities and the barriers and motivations for increasing participation. Understanding these and many other participation topics to ensure we do use this participation profile in identifying the playing pitches and sports facilities required do match the participation profile now and in the future.
4. This section sets out the current profile of participation and answer a number of questions, for example, how the profile of adult sports participation varies spatially across each of the three districts in Greater Norwich. Do people in different areas of each district participate in different sports and or does their rate of participation vary? Which are the most popular activities and as important what is the scale of complete inactivity in any form of participation.
5. This profile of participation is the essential foundation for the assessment of indoor and built facilities development. If we know what the hard evidence is saying about the profile of sports participation across each district then we can *match this up* against the sports facilities – are they the right type of sports facilities for the participation profile? Are the facilities located in areas where the people living in those areas do the sports which they provide?
6. The finding from the compilation of this evidence base has been applied in the Greater Norwich Strategy document.
7. The sequence of contents for this section are:
  - England wide and Greater Norwich trends in adult participation in sport and physical activity;
  - Adult and young peoples participation in sport and physical activity, from the Sport England Active People survey;
  - Customer satisfaction levels with the sporting offer in the Greater Norwich Districts
  - Impacts of levels of sporting and physical activity and inactivity on health benefits and the costs of inactivity for each of the three Greater Norwich Districts;
  - Spatial Analysis of sport and physical activity participation and obesity levels; and
  - Profile of adult sports participation for each local authority area.

8. For each of the bullet points above there is a summary of key findings. The first stage of this assessment is based on hard evidence findings, from the Sport England national survey of adult sports participation (Active People). This will be based on the three districts in Greater Norwich as this is how the data is assembled. This profile will be compiled in some detail.
9. To this Active People assessment is added findings on the profile of young people's participation in sport and physical activity. This will be drawn from the National Taking Part surveys which is an annual survey of young people's participation in two age bands 5 – 10 year olds and 11 – 15 year olds in all cultural activities. As this is a Department of Culture, Media and Sports (DCMS) survey, culture is defined as those activities within the remit of DCMS.
10. From this overall assessment of sports and physical activity participation it is possible to identify options to better match the sports participation profile to the future needs for indoor sports facilities. Simply put, the provision of sports facilities should respond to identified need and demand for specific and popular activities at appropriate locations.

#### **Sources of evidence for adult and young people's participation in sport and physical activity**

11. Sport England's Active People Survey provides the most comprehensive assessment of levels of sports participation across the country at a local authority, county, regional and national level. It measures a range of performance indicators including participation levels, volunteering and satisfaction with local sports provision. It also measures participation in particular sports and activities and allows for an analysis of participation according to gender, disability, ethnicity and other demographic indicators.
12. As well as participation, it is also possible to measure non-participation using Active People. This makes it possible to identify those sections of the population most in need of intervention in order to increase their participation in sport and physical activity. The annual survey results can be used to identify general patterns and trends in participation across years.
13. The analysis utilises data from surveys that have been conducted by Sport England: APS 1 (2005/6), APS 2 (2007/8), APS 3 (2008/9), APS 4 (2009/10) and APS 5 (2010/11) and APS 6 (2011/12) and APS 7 (2012/13) Note: AP7 commenced in October 2012 and was completed in October 2013. The full year details for AP 7 were not available at the time of undertaken this analysis (September 2013) and so the analysis is based on a combination of part year findings from AP7 and full year findings for AP 6. Furthermore some of the other data is from earlier AP years. The AP survey years are referenced in the report. Also some of the tables combine findings for more than one survey year.
14. Sport England organises the analysis and presentation of Active People (AP) and AP Market Segmentation data on a local authority basis and it is not possible to re-aggregate that data to a Greater Norwich basis. Consequently the findings are reported for each local authority separately. Where it is possible to do some re-aggregation of the individual local authority data based on our own compilation this is done as a composite with the production of new tables by NAA.

15. In addition to the Sport England Active People data it is recognised that to provide a rounded headline assessment of the sporting and physical activity profile of participation in an area inter relates to health data and employment data as well.
16. Related to sports inactivity is the impact this has in terms of the health benefit and disbenefit. The health impact of physical inactivity survey uses estimates of local levels of physical activity from the Sport England Active People survey. It models the potential benefit from increased levels of physical activity has on reducing the levels of preventable death from specific levels of activity, if 100%, 75%, 50% or 25% of the local population undertake the UK Chief Medical Officers' recommended levels of physical activity.
17. These are national sources of evidence applied to the Greater Norwich local authority areas. In addition it is important to source local surveys and sources of evidence. One such source is reviewing the profile of sports centre membership for each of the main public sports and leisure centres in each of the three districts. This information will also be used as the basis for subsequent consultations. Does the hard evidence findings from the Sport England data match up with what is happening on the ground, what differs and why? Also it provides a picture of the catchment area of individual sports facilities and spatially how this compares with local authority boundaries.
18. Collectively all these sources provide a rounded assessment of the Greater Norwich area profile of adult and young people's sports participation currently.

**Sport England's Active People Survey: National Headline Findings from the Active People 7 Survey**

19. Before describing the profile of sports participation across Greater Norwich it is important to set out the trends for what is happening across England. Does Greater Norwich follow the national pattern or are there any different features?
20. Sport England's data for 2012/13, compared to 2005/6, shows:
  - more men and women are taking part;
  - increased numbers of disabled people are taking part;
  - statistically significant increases in five out of the nine English regions, including the East Region;
  - increases among both black and minority ethnic and white British adults; and
  - more people from managerial/professional and intermediate social classes taking part, but no change among other socio-economic groups.
21. Some key findings are:
  - gender, age and socio-economic group have a big influence on sports take-up;
  - more men play sport than women. Currently 40.1% of men play sport at least once a week, compared to 30.5% of women. At a younger age, men are much more likely than women to play sport. But this difference declines sharply with age;

- 54.7% of 16-to-25-year-olds take part in at least one sport session a week, compared to 31.4% of older adults; and
  - take-up is highest, and rising, among managerial/professional workers and intermediate social groups. It is lowest, and static, among manual workers and unemployed people.
22. In terms of changes in participation by sport comparison of AP 6 (October 2011 – October 2012) with AP6 Q3 to AP & Rolling 12 months (Apr 2012 – April 2013) and for the main sports in the Greater Norwich study the sports with the most significant changes are set out in Table 1 overleaf. (Note: this is in effect only a 2 year comparison and the longer term trends over the full AP surveys 1 – 7 may well show different trend findings to those set out below). The key findings from this national table shows;
- 4 sports have a positive change, these being cricket, basketball, table tennis and volleyball. None of these are the biggest sports in terms of number of participants, with cricket being the highest at 189,400 nationally and volleyball the lowest at 34,400;
  - 8 sports show a negative change. Of note is that all the largest sports in terms of numbers of participants from swimming to tennis (indoor and outdoor) have decreasing participation; and
  - the actual numbers participating are low in terms of percentage of the England wide population. Swimming has the highest at 6.65% of the population and volleyball the lowest at 0.08% of the population.

**Table 1: Percentage and number of participants in each sport for AP 6 (October 2011 – October 2012) compared with AP6 Q3 to AP & Rolling 12 months (Apr 2012 – April 2013)**

APS6 (Oct 2011 - Oct 2012)		APS6 Q3 to APS7 Q2 Rolling 12 months (Apr 2012 - Apr 2013)			
Sport	Percentage of population	Number of Participants	Percentage of population	Number of Participants	Statistically significant change from APS 2
Swimming	6.81%	2,931,000	6.65%	2,892,200	Decrease
Football	4.94%	2,126,400	4.46%	1,939,700	Decrease
Athletics	4.72%	2,030,700	4.50%	1,958,000	Decrease
Cycling	4.55%	1,962,000	4.29%	1,866,100	Statistically no change
Badminton	1.26%	522,400	1.15%	499,000	Decrease
Tennis (outdoor and indoor)	1.03%	455,100	0.98%	424,400	Decrease
Bowls	2.45%	245,100	2.47%	223,900	Decrease
Cricket	0.43%	183,400	0.44%	189,400	Increase
Rugby Union	0.42%	183,400	0.38%	166,400	Decrease
Basketball	0.32%	155,900	0.42%	172,400	Increase
Table Tennis	0.23%	98,400	0.26%	112,200	Increase
Hockey	0.21%	86,800	0.19%	79,200	Decrease
Volleyball	0.06%	22,700	0.08%	34,400	Increase

(Source: Sport England Active People Surveys 5 and 6 October 2010 – October 2012)

**Active People Survey Findings for former National Indicator NI 8 for Broadlands District, City of Norwich and South Norfolk District**

23. A former and standard measure of adult sports participation which was used as a national indicator of adult sports participation is a measure known as NI8. This is a measure of adult (16+) population who participate in sport and active recreation for at least 30 minutes on at least 12 days in the last 4 weeks. This is usually referred to as the 3 x 30 minutes on 3 or more days a week. (Note: these local area estimates of adult participation in sport and active recreation differ from Sport England's 1x 30 sports participation indicator. Sport England's 1x 30 sports participation indicator includes a narrower range of activities (than specified for NI 8) - it does not include recreational walking or recreational cycling. The 1x 30 sport participation measure is based on once week participation, rather than three times a week for the former NI8 measure of sport

and active recreation. Also the NI 8 findings tend to be lower percentages of participation).

24. The NI 8 measure is however for local authorities still a benchmark of sports participation. The findings for this measure for the Greater Norwich authorities and for Norfolk County are set out in Table 2 below. These figures are taken right across all the Active People surveys from AP 1 to P 7 2nd quarter April 2013.

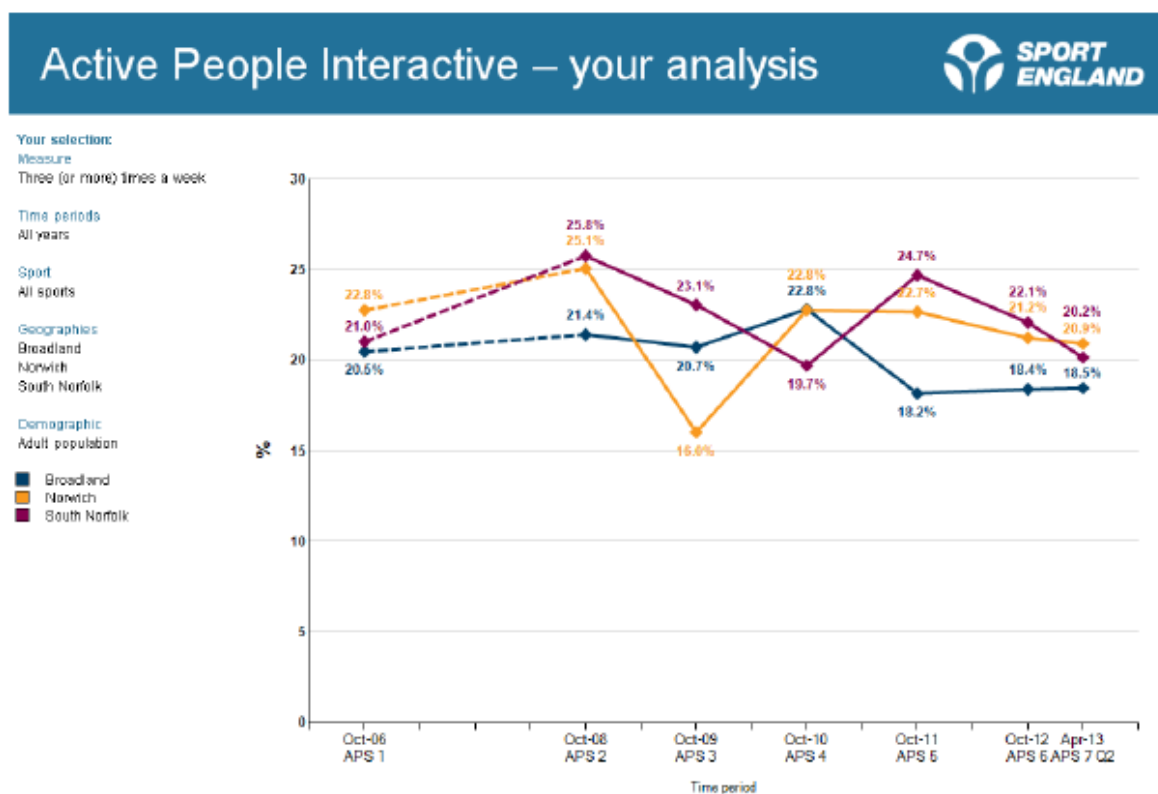
**Table 2: Adult participation in Sport NI 8 Measure**

Area name	APS1 (Oct 2005 - Oct 2006)		APS2/3 (Oct 2007 - Oct 2009)		APS4/5 (Oct 2009 - Oct 2011)		APS5/6 (Oct 2010 - Oct 2012)		APS5 Q3 to APS7 Q2 (Apr 2011 - Apr 2013) (Rolling 24 month period)		Change between APS1 (Oct 2005- Oct 2006) and APS5 Q3 to APS7 Q2 (Apr 2011 - Apr 2013)		
	%	Base	%	Base	%	Base	%	Base	%	Base	Percent age point change	Range	Significant
<b>Broadlands</b>	20.5%	997	20.9%	994	20.5%	1,009	18.3%	998	19.6%	971	- 0.9%	+/- 3.52%	No change
<b>Norwich</b>	22.8%	1,002	20.2%	991	22.7%	992	21.9%	998	20.8%	991	- 2%	+/- 3.62%	No change
<b>S Norfolk</b>	21%	1,007	24.6%	1,010	22.2%	1,001	23.4%	989	21.4%	975	+0.4%	+/- 3.58%	No change
<b>Norfolk County</b>	20.6%	7,099	21.4%	3,490	20.3%	3,050	19.7%	3,477	21%	3,485	+ 0.4%	+/- 1.79%	No change

(Source: Sport England: Active People Surveys AP 1 – AP7)

25. This same information for the three authorities can also be presented in chart form and shows the changes in participation over each year and presents the trends visually. This is set out as chart 1 below and shows in year one (2005-06) there is a narrow range of participation by the three authorities on this measure. With Norwich (shaded yellow) having the highest at 22.8% of the adult population, South Norfolk 21% (maroon) and Broadland (dark blue) 20.5%.
26. Over the course of the next 5 surveys there is quite a lot of fluctuation in participation in each authority and quite a wide variation, especially in Norwich. However by the latest survey AP 7 (up to April 2013) the three authorities are quite close again albeit lower than in AP 1 in 2005 – 06. Broadland has the lowest participation at 18.5%, South Norfolk is 20.2% and Norwich is 22.8%.
27. The percentage figures for Norfolk County and England wide in AP 1 are 20% and 21.3% and by AP 7 the percentages are higher in both cases at 21.4% for Norfolk and 23.7% England wide. So the Greater Norwich authorities in AP 1 had participation levels at the County and England wide levels but by AP 7 are below both the County and England wide.

**Chart 1: Active People Survey 1 – 7. Rate of 3 x 30 minutes participation in sport and physical activity for Broadland District, City of Norwich District and South Norfolk District.**



(Source: Sport England AP Survey Interactive)

28. The key findings in respect of each of the Greater Norwich authorities are:

- the rate of adult sports participation started within a narrow range has fluctuated with wide variations over the intervening surveys to AP 7 and the Greater Norwich authorities are now close together albeit participation is lower in AP 7 than in AP 1;
- Broadland District participation has dipped over the AP survey period. In AP 1 it was 20.5% of the adult population participating in sport and physical activity and by AP 7 this had changed to 18.5% based on the NI 8 measure;
- Norwich City participation was 22% of the adult population in AP 1 and this has decreased to 20.9% in AP 7, based on the NI 8 measure;
- South Norfolk's participation is 21% in AP 1 and by AP 7 this has changed to 20.2%; and
- all three authorities have a lower rate of adult participation by this measure in AP 7 than compared with Norfolk County which is 21.4% and for England wide which is 23.7%.

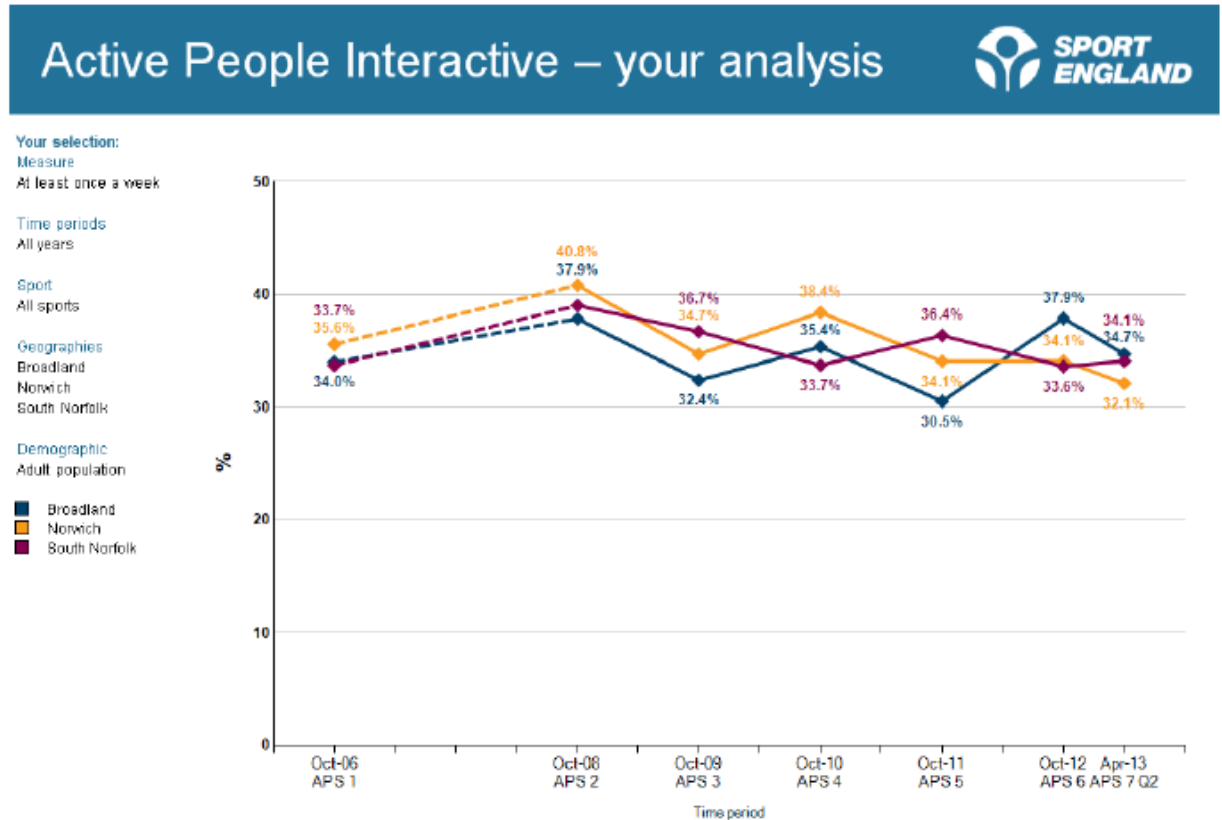
29. Finally on these national measures of sports participation applied to each district it is important to consider what is the trend in adult sports participation over the period of all



the AP surveys between 2005/06 which is AP 1 and to AP 7 up to April 2013. This measure is important because it is the Sport England adopted measure for changes in sports participation. Whilst local authorities may still apply the NI8 measure because it was a national performance indicator measure for local authorities performance the now adopted sport measure is once week participation.

30. The findings based on this measure for all three Greater Norwich authorities are set out in Chart 2 overleaf.
31. As Chart 2 shows;
  - all three authorities start in APS 1 in 2005 – 06 with a narrow similar level of participation. The lowest being South Norfolk at 33.7% of the adult population participating once a week, Broadland at 34% and Norwich at 35.7%;
  - by APS 7 in April 2013 there is still a narrow range of overall participation across all three local authorities. It is lowest in Norwich at 32.5% of all adults participating once a week and this is the lowest participation level for Norwich across all seven AP surveys. South Norfolk are at 34.1 % compared with 33.7% in AP S 1 so virtually no change, whilst Broadland is at 34.7% by this measure in APS 7 compared with 34% in APS 1, so an increase of 0.7% over the seven years;
  - so overall across the seven APS surveys between 2005 – 2006 and 2012 – 13 all three local authorities are by APS 7 at virtually the same level of participation as they were in APS 1. There is a slight increase in Broadland and South Norfolk and a slight decrease in Norwich; and
  - in between the levels of participation have fluctuated and all three authorities have had higher and lower levels of participation. Broadland being highest in APS 6 2011 – 12 at 37.9%, Norwich being highest in APS 2 2006 -07 at 40.8% and South Norfolk highest in APS 5 2010 -11 at 36.4%.
32. The key finding in the chart is that overall there has not been a sustained increase in adult sports participation between 2005 – 06 and 2012 – 13. In projecting what the demand for sports facilities could be in the future then the levels of adult sports participation are fundamental in making this assessment. Given these APS survey findings then modeling projected future demand based on participation suggests that maintaining existing levels of participation at the levels achieved in the seven APS survey years is the prudent basis to apply for assessment purposes.

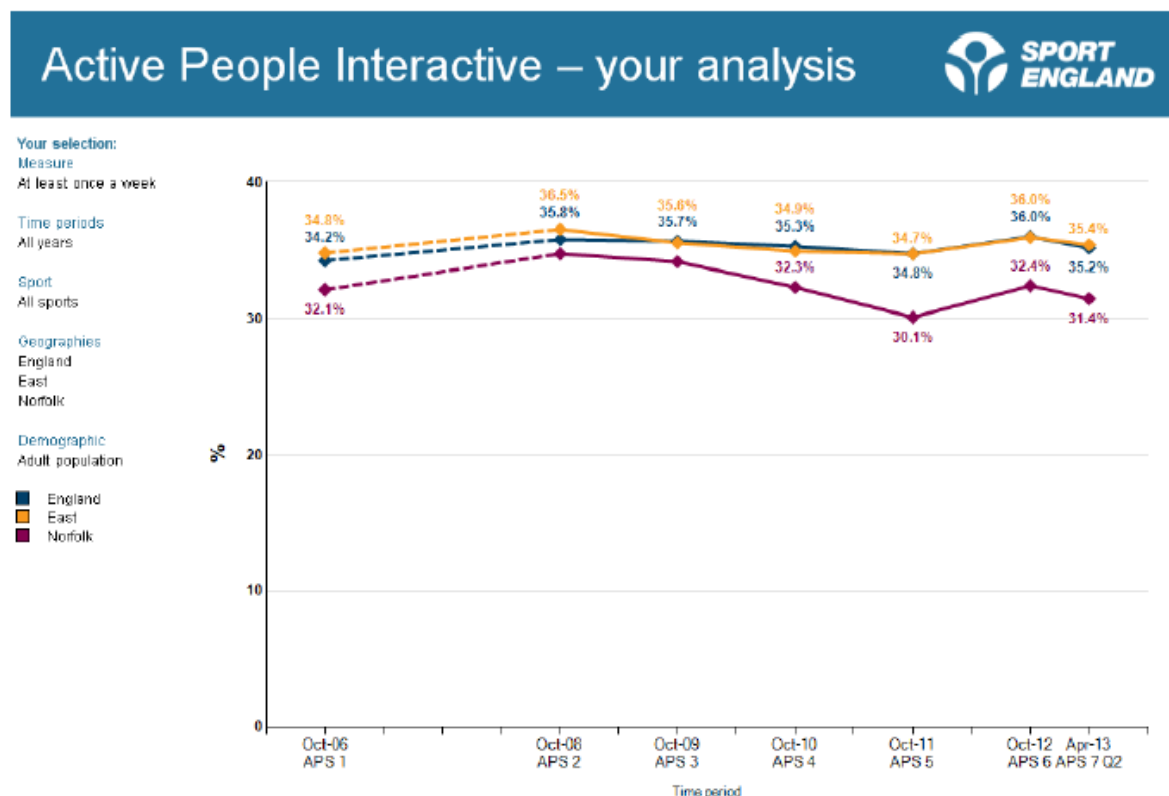
**Chart: 2: Adult (16+) participation in sport (at least once a week), by year over APS 1 to APS 7 for Broadland, City of Norwich and South Norfolk**



Source: Active People Survey, Year: 2005/06 (APS1), to 2012/13 (APS7), Measure: Adult participation. 1 session a week (at least 4 sessions of at least moderate intensity for at least 30 minutes in the previous 28 days)

33. In order to provide some context for the adult sports participation over APS 1 – APS 7 for the Greater Norwich authorities the participation level achieved across Norfolk County, East Region and for England wide based on the same once a week measure are set out overleaf in Chart 3.
34. As the chart shows all three Greater Norwich authorities are above the Norfolk County Rate in APS 1 which is 32.8% of the adult population. They are below the East Region level which is 34.8% and they are in line with the England wide level of once a week adult participation in AP! At 34.2%.
35. By AP 7 in 2012 – 13 the Norfolk County participation has decreased to 31.4% of the adult population, so all three Greater authorities are above this level. The East Region percentage is 35.4% of the adult population participating once a week and so all three Greater Norwich authorities are below this level of participation. The England wide percentage in APS 7 is 35.2% of the adult population participating once a week and so again all three Greater Norwich authorities are below this level.

**Chart 3: Adult (16+) participation in sport (at least once a week), by year over APS 1 to APS 7 for Norfolk County, East region and England wide**



Source: Active People Survey, Year: 2005/06 (APS1), to 2012/13 (APS7), Measure: Adult participation. 1 session a week (at least 4 sessions of at least moderate intensity for at least 30 minutes in the previous 28 days)

### Satisfaction with local provision for sport

36. Active People also have a KPI measure of the satisfaction with local provision for sport by the resident population. This includes satisfaction with the full sporting offer so sports development as well as sports facility management and provision.
37. The importance of these customer satisfaction findings are as an indicator to more detailed assessment of the sports facilities offer and whether there is a variation/difference between the overall findings. Customers can have much higher satisfaction with the sports facilities even if they are older but well maintained and provide a positive customer experience.
38. The level of satisfaction for local provision is set out below in Tables 3-5 for each of the three districts over the 2008/09 – 2010/11 periods. Both Broadland and Norwich Districts have customer satisfaction levels at between 2% - 3% below the East of England and England wide percentages for both years. Whilst South Norfolk districts customer satisfaction levels are on a par with both East of England and for England wide for both years.

**Table 3: Levels of customer satisfaction with the sporting offer in Broadland District**

Indicator	Broadland				East of England				England			
	2008/09	2009/10	2010/11	2011/12	2008/09	2009/10	2010/11	2011/12	2008/09	2009/10	2010/11	2011/12
KPI6+ - Satisfaction with local provision	65.2%	68.5%	N/A	N/A	69.7%	70.2%	N/A	N/A	68.4%	69.0%	N/A	N/A

Source: Active People Survey, Year: 2007/08-2010/11, Measure: Key Performance Indicator 16

**Table 4: Levels of customer satisfaction with the sporting offer in Norwich District**

Indicator	Norwich				East of England				England			
	2008/09	2009/10	2010/11	2011/12	2008/09	2009/10	2010/11	2011/12	2008/09	2009/10	2010/11	2011/12
KPI6+ - Satisfaction with local provision	67.9%	67.5%	N/A	N/A	69.7%	70.2%	N/A	N/A	68.4%	69.0%	N/A	N/A

Source: Active People Survey, Year: 2007/08-2010/11, Measure: Key Performance Indicator 16

**Table 5: Levels of customer satisfaction with the sporting offer in South Norfolk District**

Indicator	South Norfolk				East of England				England			
	2008/09	2009/10	2010/11	2011/12	2008/09	2009/10	2010/11	2011/12	2008/09	2009/10	2010/11	2011/12
KPI6+ - Satisfaction with local provision	69.4%	69.6%	N/A	N/A	69.7%	70.2%	N/A	N/A	68.4%	69.0%	N/A	N/A

Source: Active People Survey, Year: 2007/08-2010/11, Measure: Key Performance Indicator 16

### Sporting Inactivity

39. Before going into the detail of the sports participation profile for each authority it is important to consider the data on levels of sporting and physical activity and inactivity. In effect this is the participation challenge to turn inactivity into activity and the Sport England strategy for 2012 – 2017 is to encourage more people to take on and keep a sporting habit for life.
40. The Active People Survey measures the proportion of people who had not participated in 30 minutes of moderate sport and physical activity on any day in the four weeks prior to the survey. Results for each local authority are provided below along with East Region and England wide data. (Note: this information is not produced for Norfolk County). Data for this indicator comes from Active People surveys 1-4 and is the latest data available. It is not the same as the findings from the Active People latent demand survey which also measures inactivity.

41. As Table 6 shows the levels of sporting inactivity across all geographical areas are considerably higher than for the levels of actual activity. In effect Table 6 below represents the scale of the challenge in turning inactivity into activity.
42. The key findings are:
- Both Broadland and Norwich District have a lower percentage level of inactivity in AP4 than in AP 1 by between 1% - 2%. Whilst South Norfolk has just over a 1% increase in inactivity between the two survey years.
  - Both Broadland and Norwich have a between a 1% - 2% lower percentage of inactivity in AP 4 when compared with the East of England and England wide percentages in AP4. Whilst South Norfolk has a 1.8% higher rate of inactivity.

**Table 6: Sporting Inactivity in the Broadland, Norwich and South Norfolk Districts and for East Region and England wide (APS 1-4)**

<b>Key Performance Indicator</b>	<b>APS 1 (2005 - 06)</b>	<b>APS 2 (2006 - 07)</b>	<b>APS 3 2007 -08)</b>	<b>APS 4 (2008 -09)</b>
3 x 30 sport - Zero sessions x 30 minutes, moderate intensity sport or active recreation in last 4 weeks (all adults)				
<b>Broadland District</b>	<b>57.9%</b>	<b>54.1%</b>	<b>60.1%</b>	<b>56.3%</b>
<b>Norwich District</b>	<b>56.5%</b>	<b>52.4%</b>	<b>57.9%</b>	<b>55.1%</b>
<b>South Norfolk District</b>	<b>58.2%</b>	<b>54.7%</b>	<b>56.6%</b>	<b>59.3%</b>
East Region	58%	56.2%	57%	57.5%
England Wide	58.8%	57%	57.7%	57.5%

(Source Sport England Active People Diagnostic APS 1 – 4)

### **Health Impact of sporting and physical activity and Inactivity**

43. Related to sports inactivity is the impact this has in terms of health benefit and disbenefit. The health impact of physical inactivity uses estimates of local levels of physical activity from the Sport England Active People survey. It models the potential benefit from increased levels of physical activity has on reducing the levels of preventable death from specific levels of activity, if 100%, 75%, 50% or 25% of the local population undertake the UK Chief Medical Officers' recommended levels of physical activity.
44. The findings are quite striking and allied to the percentage of the population who do not do any form of physical activity it puts together a compelling evidence base of the

health benefits of physical activity in reducing deaths from the biggest health conditions.

45. The first set of results is based on March 2013 and the findings for each district are set out below. Based on the rates of adult participation for the once a week participation for each of the districts set out above and which are within the range of 33% - 38% for the Active People Survey 6 (2011–12) then the levels of preventable deaths are very low at the preventable deaths between 25% and 50% of the adult population being active.
46. It is only when the participation rate is at the 75% - 100% of the adult population that the preventable deaths as a proportion of the total deaths in each district for 2012 becomes significant. As the table on the levels of current inactive above shows there is much higher inactivity than there is activity. Achieving percentage rates of active participation where there is direct benefit of preventable deaths is and at these very high levels of participation is very challenging.

**Table 7: Greater Norwich – Burden of illness and death from physical inactivity (age range 40 – 79) (footnote 1)**

Conditions Preventable through physical activity	Latest annual deaths for Broadland (2)	Preventable deaths if 100% active (3)	Preventable deaths if 75% active	Preventable deaths if 50% active	Preventable deaths if 25% active
<b>Broadland</b>					
Total deaths	495	88	60	31	0
Coronary heart disease	219	11	7	4	0
Breast cancer	91	19	13	7	1
Colorectal cancer	73	14	10	5	0
Conditions Preventable through physical activity	Latest annual deaths for Norwich (2)	Preventable deaths if 100% active (3)	Preventable deaths if 75% active	Preventable deaths if 50% active	Preventable deaths if 25% active
<b>Norwich</b>					
Total deaths	459	79	53	27	0
Coronary heart disease	204	11	7	4	0
Breast cancer	64	13	8	4	0
Colorectal cancer	52	10	7	3	0

Conditions Preventable through physical activity	Latest annual deaths for South Norfolk	Preventable deaths if 100% active (3)	Preventable deaths if 75% active	Preventable deaths if 50% active	Preventable deaths if 25% active
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**South Norfolk**

Total deaths	477	85	58	30	3
Coronary heart disease	217	11	7	4	0
Breast cancer	93	19	13	7	1
Colorectal cancer	70	14	9	5	0

(Source: Public Health England; Health Impact of Physical Inactivity Findings for 2013)

Notes

(1) This age range is not one of the standard age ranges for Active People measures of sports participation. The age range has been constructed for health reasons and the raw AP data extracted for this age range

(2) Latest annual figures is for deaths registered between 2007 - 2011

(3) The explanation of the definition of what is 100% active (of for other percentages of activity) is not defined. It is based on the Chief Medical Officer's definition which in turn might be one of the Active People measures of activity, for example 1 hour of physical activity once a week, or, 3 x 30 minutes of moderate intensity activity in sport or physical activity a week

47. It is also possible to document the financial costs from the health impacts of physical activity and inactivity and this is for specific illnesses. These are set out as Tables 8-11 overleaf for each of the three districts. It is difficult to make assessments of the financial costs of inactivity and the savings to be made by activity. Activity is more usually measured by a more active and healthy personal lifestyle and the benefits measured in these terms. Possibly the key findings in Tables 8 -11 overleaf is the cost in each authority from physical inactivity (second last column), which is £2.1m in Broadland District; £2.5m in Norwich District and £2.1m in South Norfolk District. Of course there are costs from increasing activity in providing services and programmes for people to participate in sport and to counter these costs in inactivity.
48. To provide some guidance on this, Table 8 overleaf sets out the responses to the question from the Active People survey, which sports would you most like to participate in that you do not do now. This table shows that cycling is the second most popular activity in both Broadland and Norwich with 9.2% and 7.4% of the adult population respectively wanting to participate. It is the most popular activity in South Norfolk with 10.3% of the adult population wanting to participate more.
49. Also of note is that swimming is the most popular activity in Broadland and Norwich with 11.1% of the adult population wanting to swim more in Broadland and 13% in Norwich. It is the second most popular activity in South Norfolk with 7.1% of the adult population wanting to swim more.
50. So there is a mixed picture of the flip side of costs of increasing activity but at what cost. Cycling is low cost/increased participation as it is cycle routes off road cycling and the existing road networks roads. Swimming is very high cost/increased participation

because it is indoor pools and which are the most expensive of the local authority/public sector stock of sports and recreational provision.

**Table 8: Most popular activities that adults would like to participate in, for Broadland, City of Norwich and South Norfolk Districts**

Authority and sports /activities	No. (000s)	Rate
<b>Broadland</b>		
Swimming	11.1	11.1%
Cycling	9.2	9.2%
<b>Norwich</b>		
Swimming	15.9	13%
Cycling	9.0	7.4%
Athletics	8.8	7.2%
<b>South Norfolk</b>		
Cycling	10.3	10.3%
Swimming	7.1	7.1%

**Table 9: Health Costs of Physical Inactivity Broadland District**

	The Health Costs of Physical Inactivity by disease category					The Health Costs of Physical Inactivity	
	Cancer lower GI e.g. bowel cancer	Breast Cancer	Diabetes	Coronary heart disease	Cerebrovascular disease e.g. stroke	Total Cost	Cost per 100,000 pop
Broadland	£108,514	£119,070	£417,691	£1,164,635	£348,409	£2,158,318	£1,781,695
East of England	£5,853,928	£5,755,887	£19,484,702	£60,186,615	£11,718,678	£102,999,810	£1,785,966
England	£67,816,189	£60,357,887	£190,660,420	£491,095,943	£134,359,285	£944,289,723	£1,817,285

Source: Sport England commissioned data from British Heart Foundation Health Promotion Research Group for PCTs and reworked into estimates for local authorities. Year: 2009/10, Measure: Health costs of physical inactivity, split by disease type

**Table 10: Health Costs of Physical Inactivity Norwich District**

Geography	The Health Costs of Physical Inactivity by disease category					The Health Costs of Physical Inactivity	
	Cancer lower GI e.g. bowel cancer	Breast Cancer	Diabetes	Coronary heart disease	Cerebrovascular disease e.g. stroke	Total Cost	Cost per 100,000 pop
Norwich	£125,897	£138,144	£484,602	£1,351,201	£404,222	£2,504,065	£1,781,695
East of England	£5,853,928	£5,755,887	£19,484,702	£60,186,615	£11,718,678	£102,999,810	£1,785,966
England	£67,816,189	£60,357,887	£190,660,420	£491,095,943	£134,359,285	£944,289,723	£1,817,285

Source: Sport England commissioned data from British Heart Foundation Health Promotion Research Group for PCTs and reworked into estimates for local authorities. Year: 2009/10, Measure: Health costs of physical inactivity, split by disease type



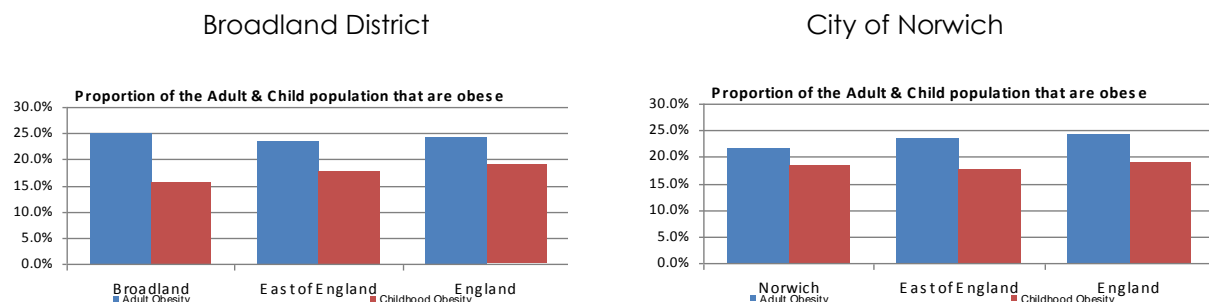
**Table 11: Health Costs of Physical Inactivity South Norfolk District**

Geography	The Health Costs of Physical Inactivity by disease category					The Health Costs of Physical Inactivity	
	Cancer lower GI e.g. bowel cancer	Breast Cancer	Diabetes	Coronary heart disease	Cerebrovascular disease e.g. stroke	Total Cost	Cost per 100,000 pop
South Norfolk	£106,850	£117,245	£411,288	£1,146,780	£343,068	£2,125,231	£1,781,695
East of England	£5,853,928	£5,755,887	£19,484,702	£60,186,615	£11,718,678	£102,999,810	£1,785,966
England	£67,816,189	£60,357,887	£190,660,420	£491,095,943	£134,359,285	£944,289,723	£1,817,285

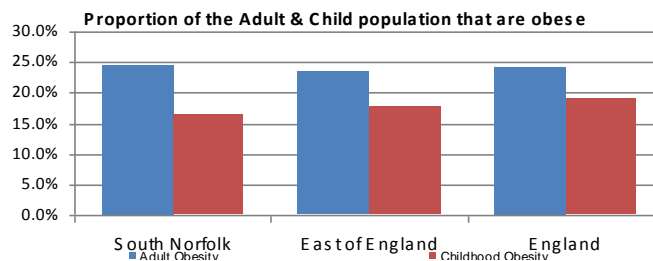
Source: Sport England commissioned data from British Heart Foundation Health Promotion Research Group for PCTs and reworked into estimates for local authorities. Year: 2009/10, Measure: Health costs of physical inactivity, split by disease type

51. The final section on the findings on the health profile of physical activity and inactivity relates to levels of obesity in adults and children. The most recent findings are from 2012 and it is possible to set out how the level of obesity in each of the three district council areas compares with the findings for the East of England and England wide. These are set out in Chart 4 below with the blue columns representing adult obesity levels and the brown columns the findings for children.
52. As the charts show adult obesity levels in both Broadland and South Norfolk districts at 25% of the adult population are on a par with the levels in both the East of England and England wide which are 23% of the adult population for both areas. In Norwich adult obesity is just over 20% of the total adult population.
53. Obesity levels in children in Broadland and South Norfolk districts are at around 15% of the children's population and just below the East of England and England averages at 17% and 19% respectively of the population for children.
54. Obesity levels for children in Norwich are at 18% of the children's population, so on a par with the East of England and England wide averages.

**Chart 4: Percentage of the adult and child population who are obese in Broadland, City of Norwich and South Norfolk Districts for 2012**



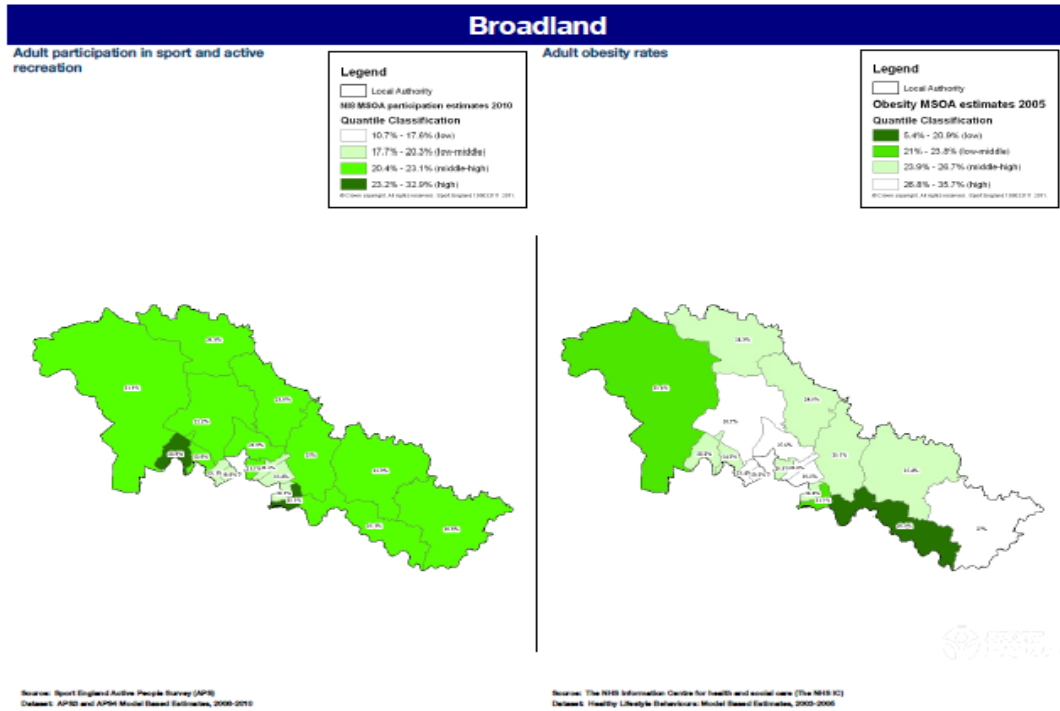
## South Norfolk District



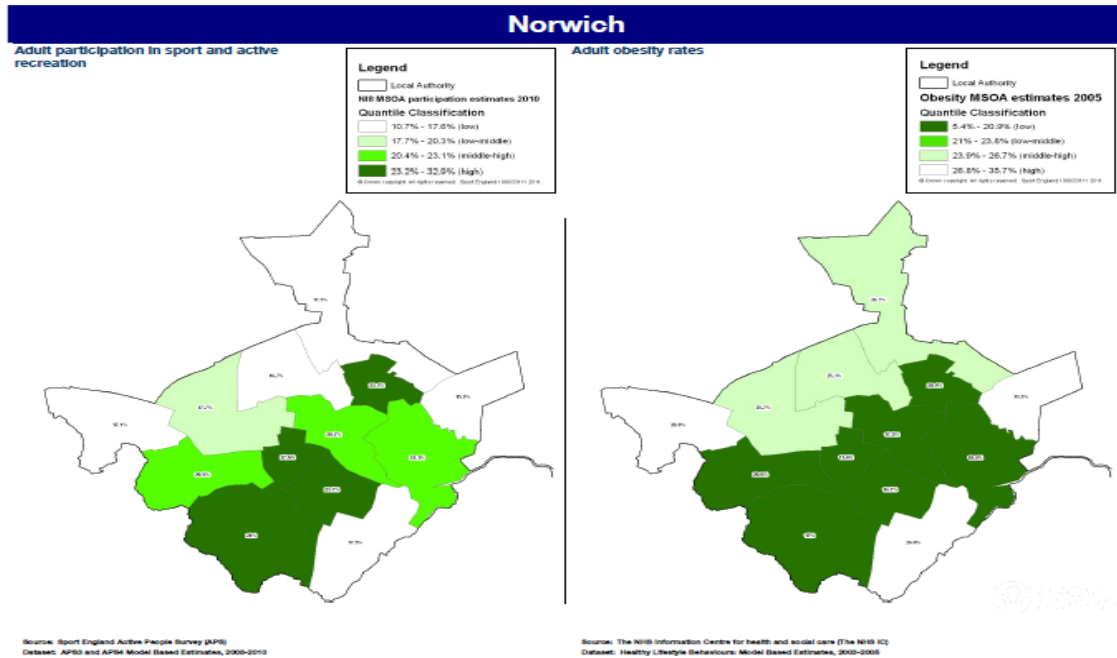
(Source Department of Health Local Authority Health Profiles 2012)

55. The information on levels of obesity can also be presented spatially to show how this differs across the area of each local authority. The spatial information on obesity can also be set out with the level of sports participation in the same output areas. In effect showing how the two compare based on the same geography.
56. Maps 1 - 6 overleaf are for each of the Greater Norwich districts and the map on the left shows the level of adult sports participation in each middle super output area based on the NI 8 measure 3 x 30 minutes of moderate sporting or physical activity once a week. The dark green areas are the areas of highest participation, graduated through dark to light shades of green and white which are the lowest levels of participation. Whilst the map on the right shows the levels of obesity in each of the same output areas with a reverse graduation of dark green being the areas of lowest levels of obesity and the white output areas the highest levels.
57. In two of the three maps for Norwich and South Norfolk there is a close relationship with the areas of highest participation (dark green) having the lowest levels of obesity (dark and mid green). This is less evident in the Broadland area where Broadland participation is virtually all in the second highest mid green range whilst the obesity output areas are more varied.
58. In essence the maps do illustrate the locations of highest levels of obesity and where to target intervention to reduce the levels of obesity. The maps do show this is quite specific areas and in general are not the areas of highest participation in sport and physical activity. (Note: the maps unlike the tables above illustrate adult levels of obesity only).

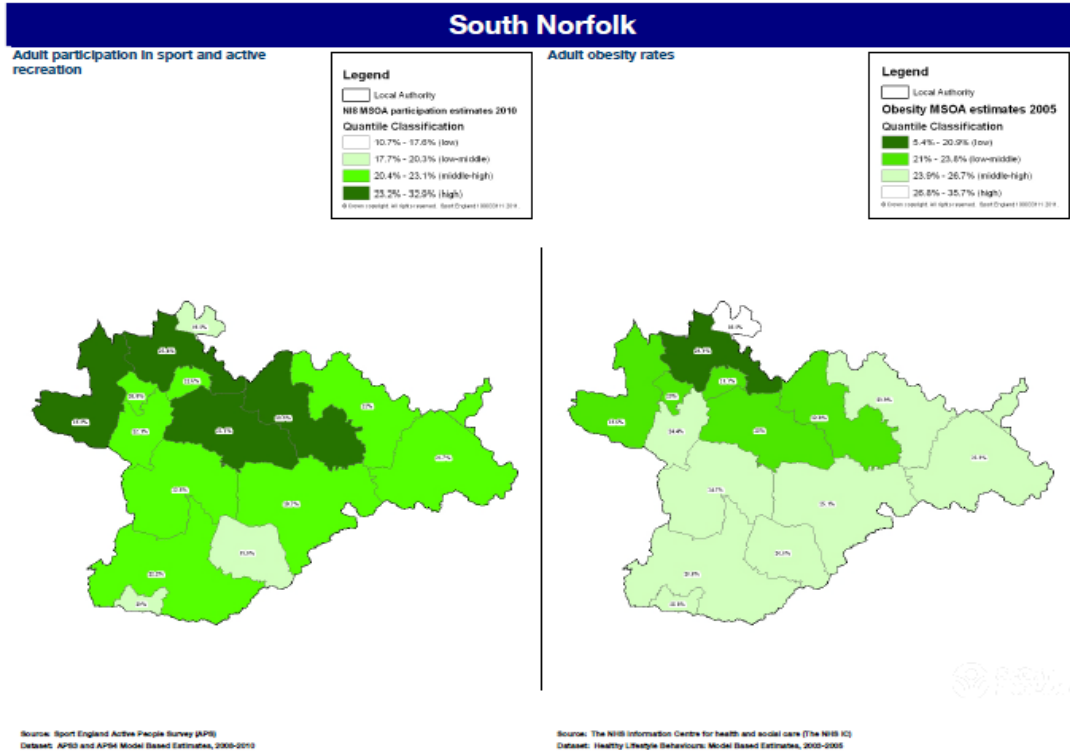
**Map 1: Levels of adult sports participation in and levels of adult obesity in middle super output areas for Broadland District**



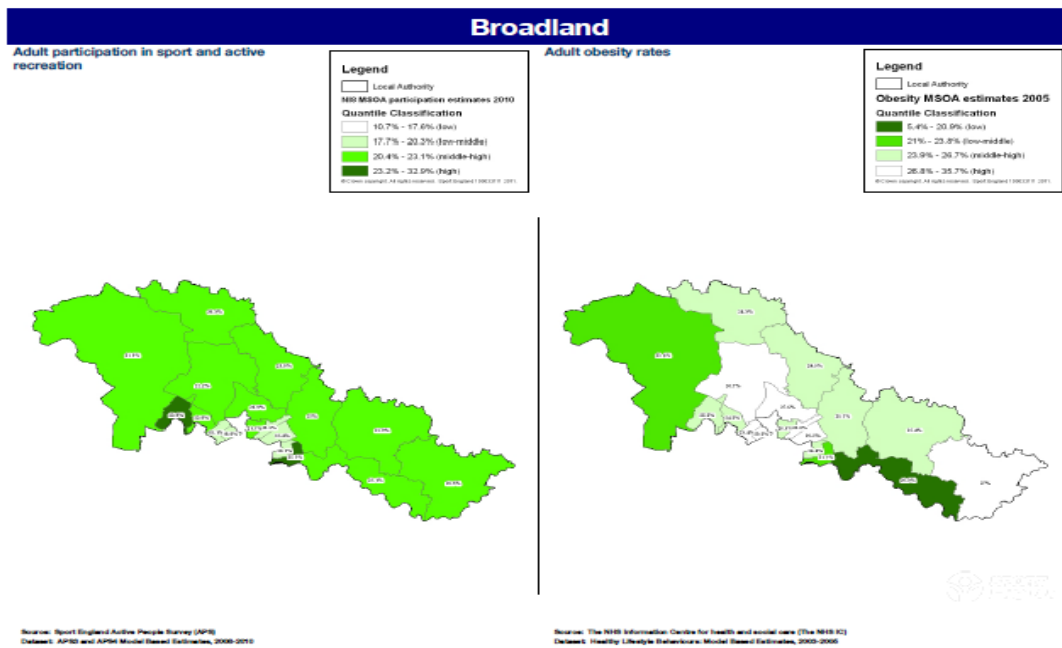
**Map 2: Levels of adult sports participation in and levels of adult obesity in middle super output areas for City of Norwich District**



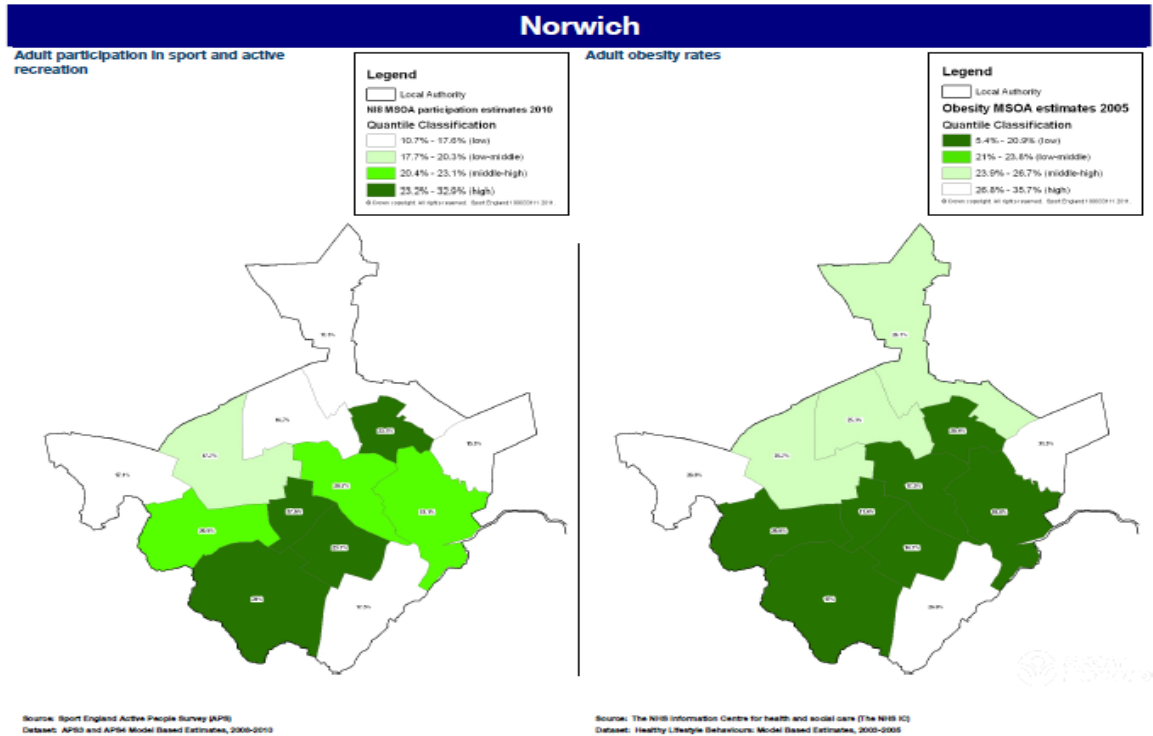
**Map 3: Levels of adult sports participation in and levels of adult obesity in middle super output areas for South Norfolk District**



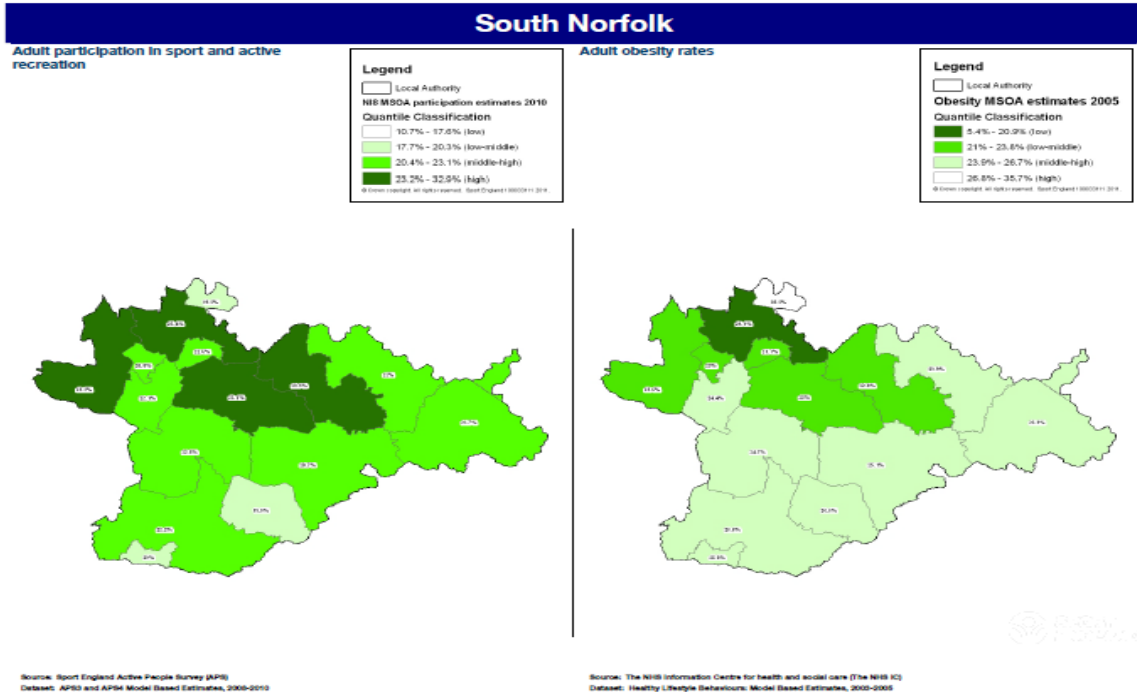
**Map 4: Levels of adult sports participation in and levels of adult obesity in middle super output areas for Broadland District**



**Map 5: Levels of adult sports participation in and levels of adult obesity in middle super output areas for City of Norwich District**



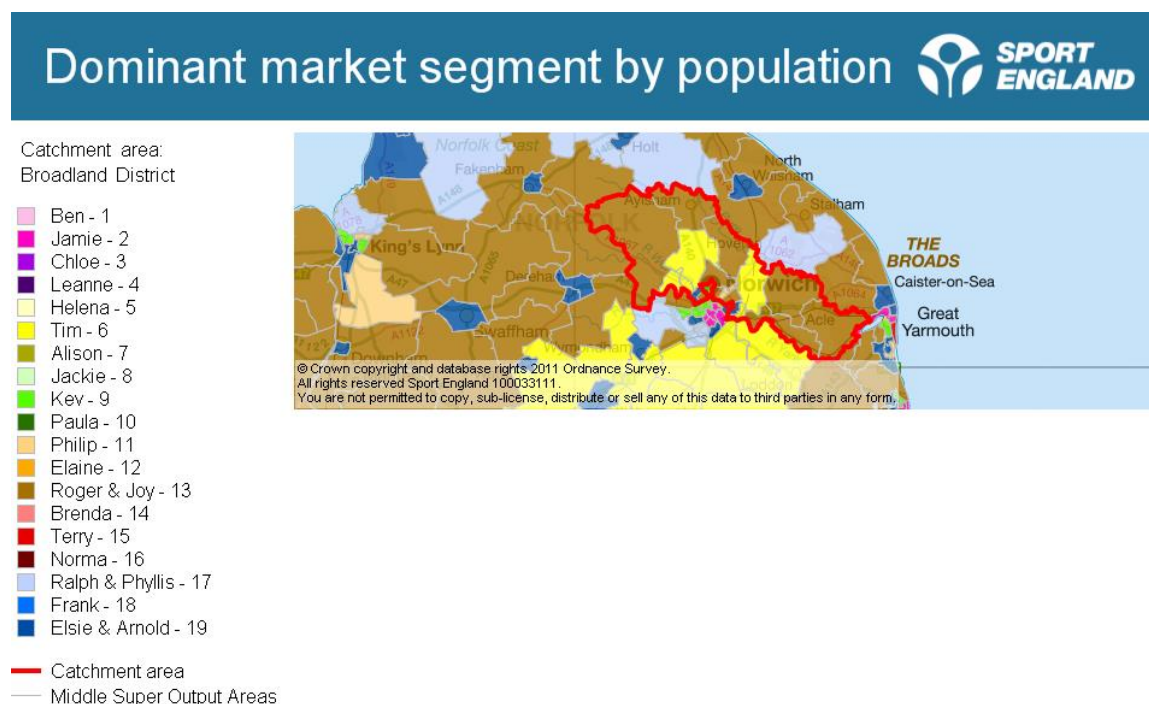
**Map 6: Levels of adult sports participation in and levels of adult obesity in middle super output areas for South Norfolk District**



## **Sport England Market Segmentation - What is the profile of adult sports participation in the Greater Norwich authorities?**

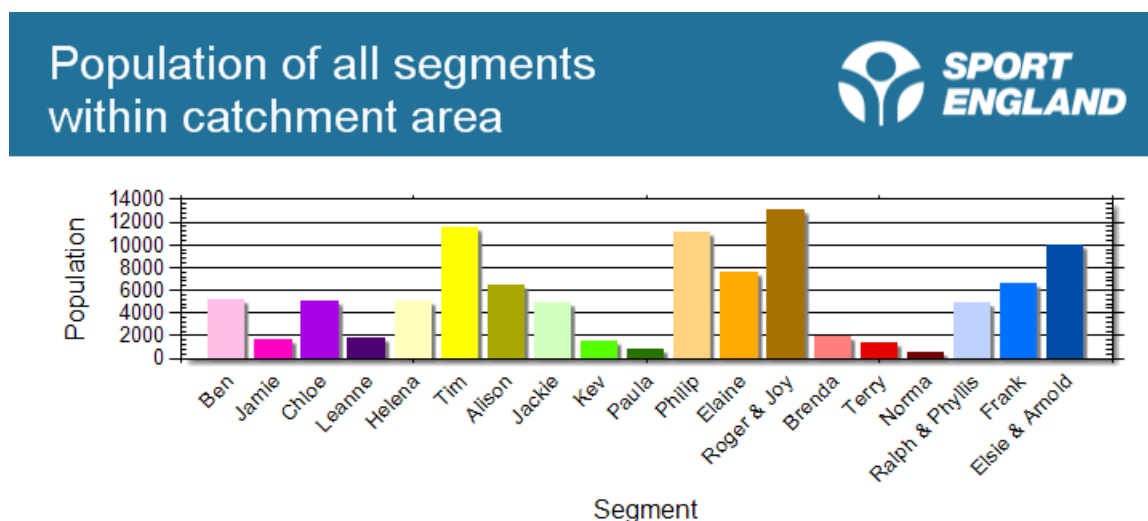
59. As part of the Active People survey findings Sport England analysed the data on the English population to produce 19 market segments with distinct sporting behaviours and attitudes.
60. This includes information on specific sports people take part in as well as why people do sport, whether they want to do sport and the barriers to doing more sport. In addition, the segments provide information on media consumption and communication channels, social capital, health indicators including obesity and engagement in the wider cultural sphere.
61. The power of these sporting segments lies not only in their ability to help us better understand the characteristics of our potential market but also to explore the market base at differing geographic levels. It is possible to analyse the market in a particular local authority. Each segment has been assigned a name which reflects the most popular first names for the group.
62. Market segmentation allows us to develop a more sophisticated, tailored approach to delivering services. In tailoring the service we provide to the customer's individual needs, rather than adopting a 'one size fits all' approach. It is one of the best tools we have to improve public services and outcomes.
63. The market segmentation map and profile for each of the Greater Norwich authorities is analysed in the same sequence of Broadland, City of Norwich and South Norfolk District. Set out are:
64. A map illustrating the single dominate market segment SPATIALLY in each middle output area. This does not mean there are not other market segments in each output area, just that the map only shows the MOST DOMINATE SEGMENT;
65. A market segmentation chart illustrating the total population for each market segment. This is more informative than the map because it provides the picture on the make up of ALL the 19 market segments in each authority;
66. A table which details all 19 market segments as well as information on the proportion of the authority's population for each segment. Plus details of the activities that are most likely to appeal to each segment and information on barriers to increasing participation and motivation factors affecting them.
67. Each map, chart and table is followed by an assessment of what it means. The final section for each authority is a summary of key findings.
68. After each authority's profile there is an overview of the key findings which are common to most authorities. The market segmentation data is taken from the Active People 4 Survey October 2010 – October 2011.
69. The findings for Broadland District are:

## Map 7: Dominant market segments in Broadland District by location



70. As Map 7 illustrates there are 2 dominate market segments across the middle super output areas of Broadland District. This is consistent with the market segmentation map for most authorities and usually there are 2 -3 dominate segments and usually close to age ranges, which is not the case in Broadlands.
71. The dominate market segments are Roger and Joy (shaded brown) and Tim (shaded yellow).). In terms of their SPATIAL distribution it is Roger and Joy which make up around 80% of the output areas across Broadland, with Tim around 20%.
72. These are the SPATIALLY dominate segments and they also have the highest population numbers. There are however some other segments which whilst not predominate spatially do have high population numbers. The population distribution across all 19 market segments is set out in Chart 5 overleaf, shown to be a bit different from the spatial distribution and is set out as map 7 above.

**Chart 5: Market Segments in by population Broadland District**



73. The top seven dominate market segments by population and the percentage of each segment within the total adult population are set out in Table 8 below.

**Table 8: Population numbers and percentages for top seven markets segments in Broadland District**

Name of Market Segment	Total population in Broadland of each segment	% of total adult (16+) population for each segment in Broadland
Roger and Joy	13,056	12.9%
Tim	11,556	11.4%
Philip	11,073	11%
Elsie and Arnold	9,957	9.8%
Elaine	7,501	7.4%
Frank	6,536	6.4%
Alison	6,496	6.4%
<b>Total</b>	<b>66,175</b>	<b>65.3%</b>

74. As the chart and table show:

- there are 3 male, 2 female and 2 male/female So a slightly male profile of adult sports participation by gender. Also the largest female segment is Elaine but this is the fifth highest segment in population numbers;
- the male segments make up 28.8% of the Broadland adult population, the female segments make up 13.8% of the Broadland adult population participation so a higher population level for the male segments. The two male/female segments make up 22.7% of the Broadland adult population;



- in terms of age bands, none of the top seven segments is below the age of 26 (Note: the adult population is defined as 16+) where there is a higher than the national average rate of sports participation and sports/physical activity participation is an important lifestyle choice for the segments in this young age band;
- in terms of age range for the segments;
  - in the 26 – 45 age range there is one segment which is Tim
  - in the 36 – 45 age range there is one segment which is Alison
  - in the 46 – 55 age range there are two segments which are Philip and Elaine
  - in the 56 – 65 age range there is Roger and Joy and
  - in the 65+ age range there are two segments which are Frank and Elsie and Arnold
- so the most dominate market segments are very much in the older age ranges, with five of the top seven segments aged over 46. These segments have lower than national average rates of sports participation and their reasons for participating are for recreational, social activity and with a strong personal health motivation.

75. The activities, key barriers and motivating factors for each of the top seven market segments for Broadland are in order of population numbers summarised below.

- **Segment 13 – Early retirement couples Roger and Joy (56 – 65)** Roger & Joy are slightly less active than the average adult population. Roger & Joy have below average levels of sports participation. 66% of this segment has done no sport in the past four weeks, compared with 60% of all adults. 38% have participated in sport at least once a week, which is consistent with other segments of the same age.

The top sports that Roger & Joy participate in are keep fit/gym and swimming which are the most popular sports with 13% of the segment doing these, followed by cycling with 8% of this segment doing cycling, golf with 6% of the segment playing golf and angling with 2% of this segment doing angling. Their participation levels are below average for all these sports, with the exception of golf and angling. Motivations to participate more are improving health and activity with family. Barriers to increased participation are transport/access and health.

- **Segment 6 – Settling down males Tim (26 – 45)** Tim – is a very active type enjoying high intensity activities. Individuals in this segment are predominantly of White British (77%), or Other White (10%) origin; or may also be Asian/Asian British (6%), of Irish heritage (5%), Black/Black British (1%), Chinese (1%) or belong to another ethnic group (1%).

Tim enjoys technical sports such as skiing, uninhibited by financial outlay. Both team games and individual activities feature high on his agenda and personal fitness activities are also popular. 21% of the Tim segment take part in cycling compared to 9% of all adults nationally; 20% of this segment takes part in keep fit/gym, compared to 17% of all adults nationally.

Swimming, football and athletics or running is also popular sports for Tim. Tim is more likely than all adults to take part in football and athletics. Motivations for Tim

to be more active include having more time and increasing personal performance. The main barrier is lack of time.

- **Segment 11 – Comfortable Mid-Life Males Philip (46-55).** Philip is another relatively active segment and is the most active segment within this age group. He is likely to enjoy team sports such as football and cricket as well as indoor activities including badminton and gym-based activities. Like Tim, Philip is likely to be a member of a club and to take part in competitive sport. Motivations for this segment include meeting friends, taking children, keeping fit and enjoyment. Barriers include being too busy, particularly due to work commitments
- **Segment 19 – Retired Elsie and Arnold (60+)** Elsie & Arnold are much less active than the average adult population, but their activity levels are more consistent with other segments in this age range. They are likely to be doing less sport than 12 months ago, mainly due to health or injury. The top sports/activities that Elsie & Arnold participate in are walking, swimming, dancing, bowls and low impact exercise. 7% of this segment takes part in swimming, and 3% do bowls. Motivations to do more are improved transport and more people to do activity with. Barriers are age and health
- **Segment 12 – Empty nest career ladies Elaine (45 – 54)** Elaine's sporting activity levels are consistent with the national average, and slightly above average for some indicators. 23% of Elaine's are likely to be a member of a health club and may also attend classes – 22% of this segment has received instruction in the past 12 months. The top sports that Elaine participates in are Keep fit/gym and swimming which are the most popular sports with around a fifth of the segment doing these, followed by cycling (7%), athletics or running (3%), tennis (2%), badminton (2%) and horse riding (2%). Motivations to participate more are keeping fit and losing weight. Barriers to increased participation are lack of time and interest
- **Segment 18 – twilight year man (66+) Frank.** Frank is generally much less active than the average adult population, but his activity levels are more consistent with other segments in this age range. He is are likely to be doing the same or less sport than 12 months ago, with health the main issue for those doing less.

Some of Franks have done no sport in the past four weeks, compared with the average of 60% of all adults. 21% have participated in sport at least once a week, which is higher than other segments of that age (the average of segments 17 to 19 is 12%). A small proportion have undertaken three sessions of sport a week 9%, compared with 11% of the over 66 age group, or 15% of all adults.

The top sports that Frank participates in are 7% of this group takes part in golf, 6% in keep fit/gym and 6% in bowls and swimming.

Main motivations for Frank are enjoyment, keeping fit and socializing. Socialising is as important for Frank as all adults, which may reflect the club environment of his favourite sports. The main barriers to increased participation are 'health, injury or disability'. This appears consistent with the age of the segment and propensity to have health problems. Some 47% of this segment has a long standing illness, disability or infirmity.

- **Segment 7 – stay at home mum Alison (26 – 45)** Alison is a fairly active with above average levels of participation in sport, with over half of this segment doing sport at least once a week (the average for all adults is 40%). 20% of Alison's participate in three 30-minute sessions of moderate intensity sport per week, compared to 15% of all adults.

76. The top sports that Alison participates in are 27% of this segment take part in keep fit/gym compared to 17% of all adults; 25% of this group take part in 'swimming' compared to 14% of all adults; 12% of this segment take part in cycling, and 11% take part in athletics (including running). Alison may also take part infrequently in one of horse-riding, tennis, badminton and netball.
77. Main motivations for Alison playing sport are keeping fit 46%, enjoyment 42%, taking the children 29% and losing weight 14%. Taking the children is a more significant motivation for Alison playing sport than it is for the overall adult population, (29% compared to 8% of all adults). The main barrier to increased participation is family commitments with health and work commitments.
78. To provide the rounded picture and profile of ALL 19 market segments, their population numbers, details of the sports/activities most likely to appeal to each segment as well as information on barriers and motivating factors affecting them are set out in Table 9 below. The seven largest segments in Broadland in terms of population numbers are shown in blue.

**Table 9: Profile of all 19 market segments Broadland District**

Segment	Total and (% of adult population in Broadland	Forename & brief description	Gender/age/status	Sports Most Interested in	Motivations	Barriers	How to Increase Participation	Participation Profile
01	5.1%	Ben Competitive Male Urbanites	Male 18-25 Single Graduate professional	Rugby, Squash, Windsurfing, Tennis, Cricket, Climbing, Gym, Football	Improving performance Training for competition Social Enjoyment Keep fit	Time Interest	Better facilities People to go with Improved transport	Most active in population Approx. 20% zero days
02	1.7%	Jamie Sports Team Drinkers	Male 18-25 Single Vocational Student	Basketball, Football, Weight Training, Badminton, Boxing, Martial Arts	Social Performance Competition	Time	Better facilities People to go with Longer opening hours	Second highest participation of all types Approx. 30% zero days
03	5%	Chloe Fitness Class Friends	Female 18-25 Single Graduate Professional	Body combat, Netball, Pilates, Running, Aqua Aerobics, Tennis, Gym, Swimming	Weight Fitness	Time	Cost Opening Hours Facilities People to go with	Active type 30-35% zero days

Segment	Total and (% of adult population in Broadland	Forename & brief description	Gender/age/status	Sports Most Interested in	Motivations	Barriers	How to Increase Participation	Participation Profile
04	1.5%	Leanne Supportive Singles	Female 18-25 Single Likely to have children Student / part time vocational education	Swimming, Gym, Aerobics, Ice Skating, Dance Exercise, Body Pump, Utility Walking	Losing weight Activities for children	Health isn't good enough  Time	Help with child care Longer opening hours Cost	Least active of A but does participate 40-45% zero days
05	8%	Helena  Career Focused Females	Female 26-35 Single Full time professional	Gym, Road Running, Dance Exercise, Horse Riding, Skiing, Tai chi, Body Pump, Yoga	Losing weight Keeping fit Improving performance	Time People to go with	Longer opening hours People to go with	Very active type 30-35% zero days
06	11.5%	<b>Tim</b> <b>Settling Down Males</b>	<b>Male 26-45</b> <b>Single / married</b> <b>May have children</b> <b>Professional</b>	<b>Canoeing, Cricket, Cycling, Squash, Skiing, Golf, Football</b>	<b>Improve performance</b> <b>Keep fit</b> <b>Social</b>	<b>Time</b>	<b>More free time</b> <b>Help with childcare</b>	<b>Very active type</b> <b>25-30% zero days</b>
07	6.5%	<b>Alison</b> <b>Stay at Home Mums</b>	<b>Female 36-45</b> <b>Married</b> <b>Housewife</b> <b>Children</b>	<b>Swimming, Badminton, Aerobics, Pilates, Tennis, Cycling, Horse Riding, Exercise Bike</b>	<b>Taking children</b> <b>Losing weight</b> <b>Keeping fit</b>	<b>Time</b>	<b>Help with childcare</b> <b>Better facilities</b>	<b>Fairly active type</b> <b>30-35% zero days</b>
08	4.8%	Jackie  Middle England Mums	Female 36-45 Married Part time skilled worker, housewife Children	Swimming, Dance Exercise, Body Pump, Ice Skating (with children), Walking, Aqua Aerobics	Taking children Losing weight	Time Cost Lack of interest	Help with childcare Cheaper admissions	Average 45-50% zero days
09	1.5%	Kev  Pub League Team Mates	Male 36-45 Single / married May have children Vocational	Football, Darts, Karate, Snooker, Weights, Boxing, Fishing, Pool, Ten Pin Bowling, Cricket	Competition Social Enjoyment (Itd) Perform	Time Slight cost factor	More free time Cost Facilities	Less active within group B Approx. 50% zero days

Segment	Total and (% of adult population in Broadland	Forename & brief description	Gender/age/status	Sports Most Interested in	Motivations	Barriers	How to Increase Participation	Participation Profile
10	4.8%	Paula Stretched Single Mums	Female 26-35 Single Job seeker or part time low skilled	Swimming, Utility walking, Aerobics, Ice Skating	Lose weight Take children	Cost Lack of childcare Poor transport Lack of interest	Improved transport Cheaper admission Help with childcare Better facilities	Least active type within Group B Approx. 60% zero days
11	11%	Philip Comfortable Mid-Life Males	Male 46-55 Married Professional Older children	Sailing, Football, Badminton, Cycling, Gym, Jogging, Golf, Cricket	Social Taking children Improving performance Enjoyment	Time Lack of childcare	More free time Help with childcare	Most active within Group C Approx. 40% zero days
12	7.5%	Elaine Empty Nest Career Ladies	Female 46-55 Married Professional Children left home	Swimming, Walking, Aqua Aerobics, Step Machine, Yoga, Horse Riding, Pilates, Gym	Keeping fit Losing weight Help with injury	Time Lack of interest	Longer opening hours More people to go with	Reasonably active type 40-45% zero days
13	13%	Roger and Joy Early Retirement Couples	Male / female 56-65 Retired or part-time	Swimming, Walking, Aqua Aerobics, Bowls, Sailing, Golf, Shooting, Fishing, Racquet Sports	Keeping fit To help with injury Enjoyment Taking grandchildren	Poor health Lack of interest Transport	Better facilities Improved transport	Participate once or twice a week 50-55% zero days
14	1.9%	Brenda Older Working Women	Female 46-55 Single / married May have children Low skilled worker	Swimming, Utility Walking, Dance Exercise, Aerobics, Step Machine, Keep fit	Weight Bring grandchildren Help with injury	Lack of interest Time	More free time Longer hours Cheaper admissions Help with childcare (for grandchildren)	Sometimes participates 60-65% zero days
15	1.3%	Terry Local 'Old Boys'	Male age 56-65 Single / married Low skilled worker Job seeker	Fishing, Shooting, Pool, Utility walking, Darts, Snooker, Utility cycling	Help with injury Social	Poor health Lack of people to go with Cost	Subsidized admissions People to go with	Some low intensity participation 65-70% zero days

Segment	Total and (% of adult population in Broadland	Forename & brief description	Gender/age/status	Sports Most Interested in	Motivations	Barriers	How to Increase Participation	Participation Profile
16	0.6%	Norma Later Life Ladies	Female 56-65 Single / married Low skilled worker Retired	Walking, Keep fit, Swimming, Aqua Aerobics	Help with injury or disability	Poor health Cost	Cheaper admissions People to go with	Lowest participation of Group C  75-80% zero days
17	4.8%	Ralph and Phyllis  Comfortable Retired Couples	Male / female 65+ Married Retired	Bowls, Golf, Tennis, Table tennis, Snooker, Walking, Fishing, Swimming	Social Improve performance and keep fit Enjoyment	Transport Lack of people to go with	Improved transport More people to go with	Highest participation of Group D  Approx. 70% zero days
18	6.5%	<b>Frank</b>  <b>Twilight Year Gents</b>	<b>Male 66+ Married / single Retired</b>	<b>Bowls, Golf, Darts, Pool, Snooker, Walking, Fishing</b>	<b>Social Enjoyment</b>	<b>Poor health</b>	<b>Improved transport Cheaper admission</b>	<b>Medium participation for group D  75-80% zero days</b>
19	4.9%	<b>Elsie and Arnold</b>  <b>Retirement Home Singles</b>	<b>Male / female 66+ Widowed Retired</b>	<b>Walking, Dancing, Bowls, Low- impact exercise</b>	<b>Social Help with injury</b>	<b>Health problems and disability</b>	<b>Improved transport People to go with</b>	<b>Lowest participation of Group D  Approx. 85% zero days</b>

### Main findings from the market segmentation review of Broadland District

79. The sporting participation and profile market segmentation findings indicate that;
- Broadland's participation profile has 2 dominate market segments spatially which are Roger and Joy and Tim. Roger and Joy are by far the most dominate market segment across the Broadland output areas. These same two market segments have the highest population numbers at 24.3% of the total Broadland adult population. So there is a correlation between where the dominate sports participants live and how many there are of them in Broadland.
  - Of the top seven market segments which make up 65% of the Broadland adult population this is spilt, 3 male, 2 female and 2 male/female segments. So a slightly higher male profile of adult sports participation by gender. However the largest female segment is Elaine but this is the fifth highest segment in population numbers.
  - The most significant finding is in terms of age of the 7 segments with the highest population numbers. None of the top seven segments is below the age of 26 (Note: the adult population is defined d as 16+) where there is a higher than the national average rate of sports participation and sports/physical activity participation is an important lifestyle choice for the segments in this young age band.
  - In terms of age range for the top seven segments;

- in the 26 – 45 age range there is one segment which is Tim
  - in the 36 – 45 age range there is one segment which is Alison
  - in the 46 – 55 age range there are two segments which are Philip and Elaine
  - in the 56 – 65 age range there is Roger and Joy and
  - in the 65+ age range there are two segments which are Frank and Elsie and Arnold.
- So the most dominate market segments are very much in the older age ranges, with five of the top seven segments aged over 46. These segments have lower than national average rates of sports participation and their reasons for participating are for recreational, social/family activity and with a strong personal health motivation.
  - The most popular activities for the five segments aged over 45 are in order of popularity; swimming; walking; keep fit/gym cycling (recreational); fishing; and snooker/darts. Of note is that only two one of these activities involves a built sports facility – swimming and gym. Whilst the others are low cost in terms of facility provision and participation can be maintained/boosted by activity programmes for walking and cycling rather than provision of facilities. Of course this is not the full picture and it only represents 65% of the total adult population in Broadland. Also these segments do participate in other activities such as golf and bowls (indoor and outdoor) which do require facilities but these are lower choice activities. The key feature/finding is that if the overriding objective s to increase participation and create a healthy lifestyle then this is low in terms of facility provision and informal recreational activity programmes have a large appeal to the majority of the participants in the Broadland profile.
  - The younger market segment age groups aged between (18 – 25) are; Ben Jamie, Chloe and Leanne. These four segments make up 8.3% of the Broadland total adult population and so there is a small percentage of adults across Broadland who have a higher than the national average rate of sports participation. These younger groups play sport in organised and competitive structures. Sport and physical activity are important lifestyle choices and they allocate a lot of time to playing sport.

80. Some further features of the Broadland sporting profile are;

- the sports and physical activities played which are common across most groups are swimming and keep fit/gym. The motivations are similar in that it is for health and lifestyle reasons, especially losing weight. Playing of team sports is not a big feature at all. So “things done” are individual activities or family based activities at recreational level rather than organised competitive sport;
- barriers to increasing participation do vary by segments and there are a number of individual reasons rather than a few common reasons. Lack of time, cost, and lack of people to play the activity with are all mentioned as barriers. Cost relates to cost of childcare and transport costs as well as just facility costs, in fact facility costs seem to be less of a barrier; and
- the fact that Broadland has a medium to high rate of sports participation, around 20% of the adult population based on the NI 8 measure of 3 x 30 minutes of moderate intensity activity 3 times a week and across the first 6 AP surveys is

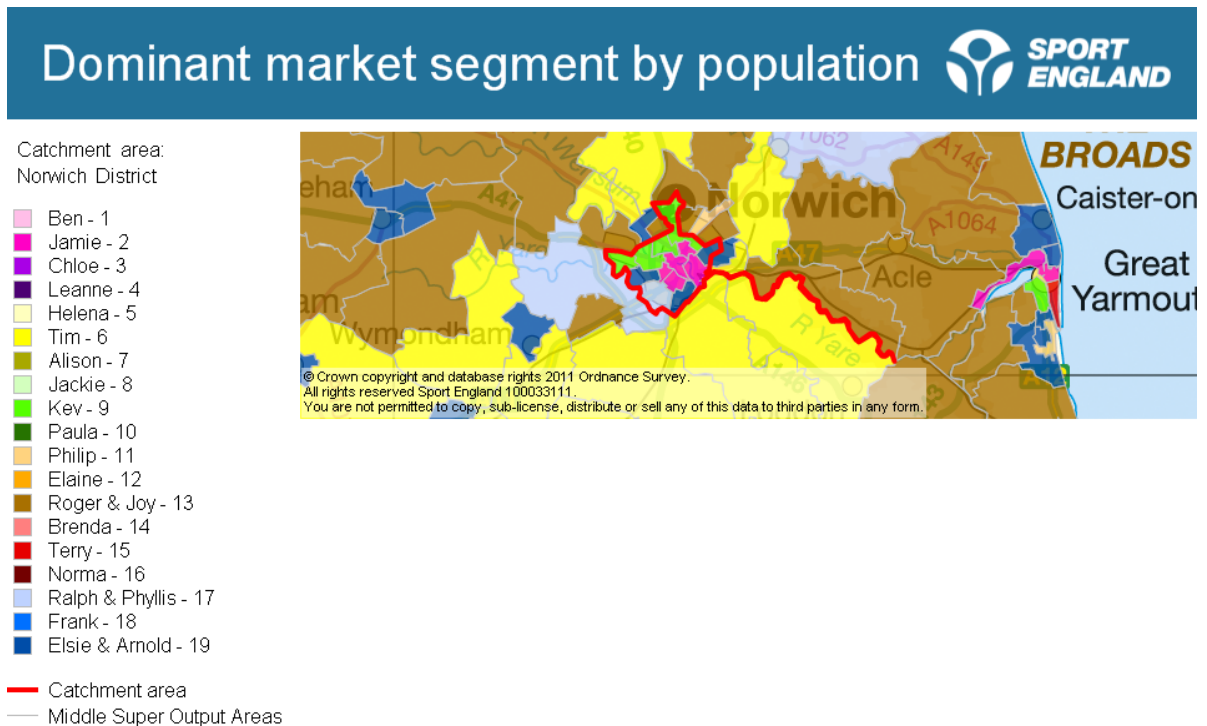
perhaps a surprising finding. The explanation is that Broadland has a lower market segmentation adult population in the 16 – 25 age range at 8.3% of the total adult population who play sport at national or above national rates of sports participation. Broadland does however have high market segmentation numbers in the 46 – 64 age range at 31.3% of the total adult population who play sport or physical activity at below national rates – so doing activity infrequently but a large population.

- 81. There is also 16.2% of the Broadland adult population aged over 65 who have even lower rates of physical activity or sports participation but two of the top seven market segments are in this age range. So again low levels of participation but a lot of people doing something - infrequently.
- 82. This ends the reporting on the profile of sports participation for Broadland District.

**City of Norwich profile of sports participation**

- 83. Next is a review of the sports participation profile for the City of Norwich using the same sources of information as for Broadland District.

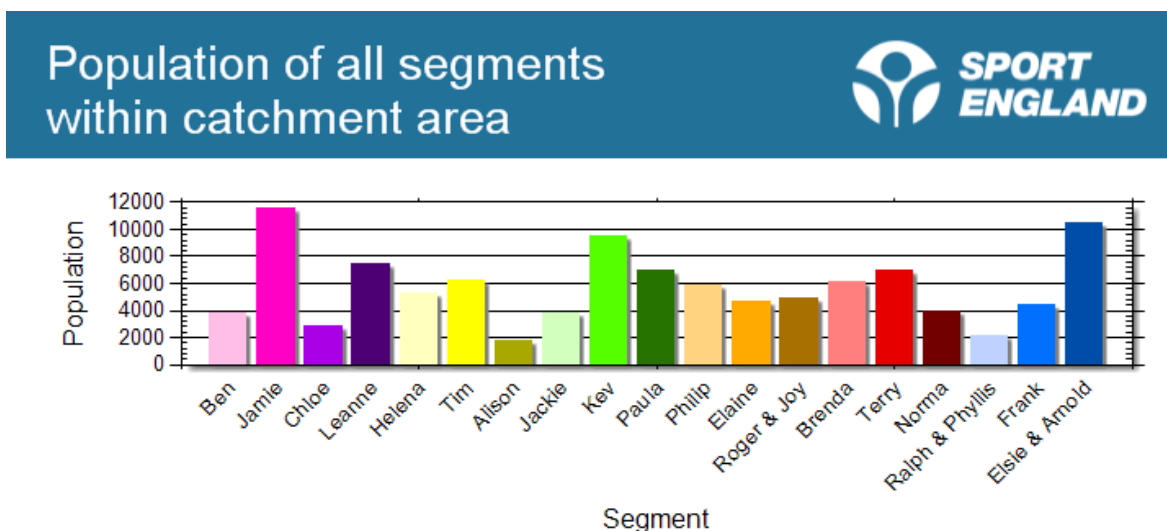
**Map 8: Dominant market segments in City of Norwich by location**



- 84. As Map 8 illustrates there are 5 dominate market segments across the middle super output areas in Norwich. The SPATIAL balance between the top 5 segments is very much focused on the Kev segment (shaded green) across the northern half of Norwich, with Jamie (shaded pink) in the centre/east and then three output areas for Elsie and Arnold (shaded dark blue) and one output area for Ralph and Phyllis (shaded light blue). So 5 dominate market segments but in land area it is dominated by y 2, these being Kev and Jamie.



**Chart 6: Market Segments in by population in City of Norwich District**



85. The chart show a somewhat different profile of population numbers for each market segment when compared with the dominate market segments spatially. Jamie is the second largest market segment spatially but the highest in population numbers at 11,558 or 10.6% of the Norwich adult population.
86. Elsie and Arnold are the fourth highest market segment spatially and the second highest in terms of population numbers at 10,470 people or 9.6% of the adult population. Whilst Kev who is the most dominate segment spatially is the third highest in terms of population numbers at 9,471 or 8.7% of the Norwich adult population.
87. Ralph and Phyllis are the final and fourth dominate market segments spatially but is the third lowest segment in terms of population numbers at 2,158 people and only 2% of the Norwich adult population. So it would seem there is a “cluster of Ralph and Phyllis's in this southern output area of Norwich but not located elsewhere in any numbers in Norwich.
88. The high population number segments but which do not appear spatially are: Leanne, 7,431 people and 7.8% of the Norwich adult population; Paula 6,970 population and 6.4% of the Norwich adult population; Terry 6,935 population and also 6.4% of the Norwich adult population; Tim and Brenda 6,230 and 6,152 people respectively and 5.7% of the Norwich adult population.
89. The top seven market segments by population are set out in Table 10 overleaf.

**Table 10: Population numbers and percentages for top seven markets segments in City of Norwich District**

Name of Market Segment	Total population in Norwich of each segment	% of total adult (16+) population for each segment in Norwich
Jamie	11,558	10.6%
Elsie and Arnold	10,470	9.6%
Kev	9,471	8.7%
Leanne	7,431	7.8%
Paula	6,970	6.4%
Terry	6,935	6.4%
Tim	6,230	5.7%
Brenda	6,152	5.7%
<b>Total</b>	<b>65,217</b>	<b>60.9%</b>

90. As the chart and table show:

- In terms of **gender** there are 4 male 3 female segments and 1 male and female segment in the top 8 segments by population. The male segments make up 31.4% of the Norwich adult population. The female segments make up 19.9% of the adult population and the one male/female segment makes up 9.6% of the Norwich adult population. So in terms of population the male segments are higher in population and there is one more segment in the top eight segments by population numbers.
- In terms of **age bands** there is a very even spread of segments across the age bands. Only one age band of 16 – 25 has two of the market segments with the highest population and all the other six segments are spread across the 26 – 65 age range. If there is a “bulge” it is in the 26 – 45 age range which has three segments. The breakdown is;
  - 2 segments in the 16 – 25 age range, these are Jamie and Leanne
  - 1 segment in the 26 – 35 age range, which is Paula
  - 1 segment 26 – 45 age range, which is Tim
  - 1 segment in the 36 – 45 age range, which is Kev
  - 1 segment in the 46 – 55 age range, which is Brenda
  - 1 segment in the 56 – 65 age range, which is Terry
  - 1 segment in the 65+ age range, which is Elsie and Arnold

91. The activities, key barriers and motivating factors for each of the top eight market segments for Lincoln are in order of population numbers summarised below.

- **Segment 2 – sports team lad Jamie (16 – 25).** Jamie is a very active type that takes part in sport on a regular basis. Jamie is a very active type that takes part in sport on a regular basis: Almost 60% do sport at least once a week compared with 40% of adults. 31% of this segment does three 30-minute sessions of moderate intensity sport per week, compared to 15% of all adults. Jamie is the second most active segment, after Ben. Individuals in this segment are predominantly of White British (60%), or Other White (15%) origin; or may also be Asian/Asian British (14%), of Irish

heritage (5%), Black/Black British (2%), Chinese (1%) or belong to another ethnic group (2%).

The top sports that Jamie participates in are 28% of this group play football, compared to 4% of all adults; 22% take part in 'keep fit and gym' compared to 17% of all adults; 12% take part in both athletics (running) and cycling, and 10% go swimming. Jamie may also take part in badminton, tennis, cricket, basketball and golf.

The main motivations for Jamie playing sport are enjoyment (54%), keeping fit (37%), and socialising (22%). These motivations are more significant for Jamie than they are for all adults. 'Training/taking part in competition' and 'taking children' is less significant motivating factors for Jamie.

Barriers for Jamie to participating more are given as 'Other' factors. This category includes 'left school', 'no opportunity', and 'economic/work reasons. Work commitments are a barrier for 27% of this segment, which is higher than amongst the overall adult population (19%). Health, injury and disability are considered a barrier to playing sport by 13% of this segment.

- **Segment 19 – Retired Elsie and Arnold (65+)** Elsie & Arnold are much less active than the average adult population, but their activity levels are more consistent with other segments in this age range. They are likely to be doing less sport than 12 months ago, mainly due to health or injury. The top sports/activities that Elsie & Arnold participate in are walking, swimming, dancing, bowls and low impact exercise. 7% of this segment takes part in swimming, and 3% do bowls. Motivations to do more are improved transport and more people to do activity with. Barriers are age and health.
- **Segment 9 – Pub league playing with his mates Kev (35 – 44)** Kev has average levels of sports participation. The sports that Kev participates in are keep fit and gym with 14% of this segment doing this activity, compared to 17% of all adults nationally. 12% of this segment takes part in football compared to 4% of all adults nationally. In addition, 11% of people in this segment take part in cycling, and 10% go swimming. Kev may also take part in athletics or running, golf, angling, badminton, archery or martial arts/combat sports. Motivations to do more activity are to improve performance, more activity with friends. Barriers are cost and lack of time.
- **Segment 4 - Supportive singles Leanne (18 – 25)** Leanne is the least active segment of her age group. The top sports that Leanne participates in are keeping fit with 23% of this group doing this activity, compared to 17% of all adults nationally. 18% of this group takes part in swimming compared to 14% of all adult nationally, whilst 9% of Leanne's take part in athletics or running, and 6% take part in cycling. Leanne may also take part in football, badminton, netball, hockey, horse-riding, tennis and volleyball. Motivations to do more activity are to do things with children, lose weight. Barriers are lack of time and questions about level of personal health.
- **Segment 10 - Stretched single Mum Paula (26 - 35).** Paula is not a very active participant and does more family based activity than her own personal participation, for example swimming with her children. The top sports that Paula

participates in are 18% of this segment participate in keep fit/gym compared to 17% of all adults; 17% of people in this segment take part in swimming compared to 14% of all adults; 5% of this segment take part in cycling, and 4% in athletics or running. Motivations for Paula to do more activity are to lose weight, and do activity with children. Barriers are cost of activity/child care and interest in types of activity offered.

- **Segment 15 – Local old boys Terry (56 – 65).** Terry is generally less active than the general adult population. Individuals in this segment are predominantly of White British (79%), or of Irish heritage (7%); or may also be Asian/Asian British (6%), of Other White (6%) origin; Black/Black British (1%), Chinese (0.5%) or belong to another ethnic group (1%).

The top sports that Terry participates in are: Keep fit/gym is the most popular sport with 8% of the segment doing this, followed by swimming 6% and cycling 6%. Angling and golf are the next most popular sports, both being played by 4% of this segment. Golf, angling and archery are the only sports where a higher proportion of Terry's participate than the national average.

Motivations for Terry to do more sport and physical activity are enjoyment, keeping fit and socialising. Enjoyment is more of a motivator for Terry than the average adult population. Barriers for Terry are listed as 'health, injury or disability'. This appears consistent with the age of the segment and propensity to have health issues. Other barriers (including no opportunity and economic factors) are also a factor but to a lesser extent than health factors.

- **Segment 6 – Settling down males Tim (26 – 45)** Tim – is a very active type enjoying high intensity activities. Individuals in this segment are predominantly of White British (77%), or Other White (10%) origin; or may also be Asian/Asian British (6%), of Irish heritage (5%), Black/Black British (1%), Chinese (1%) or belong to another ethnic group (1%).

Tim enjoys technical sports such as skiing, uninhibited by financial outlay. Both team games and individual activities feature high on his agenda and personal fitness activities are also popular. 21% of the Tim segment take part in cycling compared to 9% of all adults nationally; 20% of this segment takes part in keep fit/gym, compared to 17% of all adults nationally.

Swimming, football and athletics or running is also popular sports for Tim. Tim is more likely than all adults to take part in football and athletics. Motivations for Tim to be more active include having more time and increasing personal performance. The main barrier is lack of time.

- **Segment 14 – Older working women Brenda (46 – 55).** Brenda is generally less active than the average adult population. The top sports that Brenda participates in are, keep fit/gym which is the most popular sport with 15% of the segment doing this, followed by swimming (13%) and cycling (4%). Other sports are, athletics (including running) which around 2% of Brenda's participate in. This is followed by badminton, horse riding, tennis, martial arts (including Tai Chi), football and golf. In all cases Brenda's participation levels are below the national average for all adults. Motivations to increase activity are doing activity with grand children,

losing weight. Barriers are personal more free time, cheaper facility costs/child care for grandchildren, longer opening hours.

92. To provide the rounded picture and profile of all 19 market segments, their population numbers, details of the sports/activities most likely to appeal to each segment as well as information on barriers and motivating factors affecting them are set out in Table 11 below. The seven largest segments in North Kesteven in terms of population numbers and spatially are shown in blue.

**Table 11: Profile of all 19 market segments for Norwich**

Segment	Total and (% of population in Norwich)	Forename & brief description	Gender/age/status	Sports Most Interested in	Motivations	Barriers	How to Increase Participation	Participation Profile
01	3,792 (3.5%)	Ben Competitive Male Urbanites	Male 18-25 Single Graduate professional	Rugby, Squash, Windsurfing, Tennis, Cricket, Climbing, Gym, Football	Improving performance Training for competition Social Enjoyment Keep fit	Time Interest	Better facilities People to go with Improved transport	Most active in population Approx. 20% zero days
02	11,558 (10.6%)	Jamie Sports Team Drinkers	Male 18-25 Single Vocational Student	<b>Basketball, Football, Weight Training, Badminton, Boxing, Martial Arts</b>	<b>Social Performance Competition</b>	<b>Time</b>	<b>Better facilities People to go with Longer opening hours</b>	<b>Second highest participation of all types Approx. 30% zero days</b>
03	2,903 (2.7%)	Chloe Fitness Class Friends	Female 18-25 Single Graduate Professional	Body combat, Netball, Pilates, Running, Aqua Aerobics, Tennis, Gym, Swimming	Weight Fitness	Time	Cost Opening Hours Facilities People to go with	Active type 30-35% zero days
04	7,431 (6.8%)	Leanne Supportive Singles	Female 18-25 Single Likely to have children Student / part time vocational education	<b>Swimming, Gym, Aerobics, Ice Skating, Dance Exercise, Body Pump, Utility Walking</b>	<b>Losing weight Activities for children</b>	<b>Health isn't good enough  Time</b>	<b>Help with child care Longer opening hours Cost</b>	<b>Least active of A but does participate 40-45% zero days</b>
05	5,302 (4.9%)	Helena Career Focused Females	Female 26-35 Single Full time professional	Gym, Road Running, Dance Exercise, Horse Riding, Skiing, Tai chi, Body Pump, Yoga	Losing weight Keeping fit Improving performance	Time People to go with	Longer opening hours People to go with	Very active type 30-35% zero days

Segment	Total and (% of population in Norwich)	Forename & brief description	Gender/age/status	Sports Most Interested in	Motivations	Barriers	How to Increase Participation	Participation Profile
06	6,230 (5.7%)	Tim Settling Down Males	Male 26-45 Single / married May have children Professional	Canoeing, Cricket, Cycling, Squash, Skiing, Golf, Football	Improve performance Keep fit Social	Time	More free time Help with childcare	Very active type 25-30% zero days
07	1,772 (1.6)	Alison Stay at Home Mums	Female 36-45 Married Housewife Children	Swimming, Badminton, Aerobics, Pilates, Tennis, Cycling, Horse Riding, Exercise Bike	Taking children Losing weight Keeping fit	Time	Help with childcare Better facilities	Fairly active type 30-35% zero days
08	3,812 (3.5%)	Jackie Middle England Mums	Female 36-45 Married Part time skilled worker, housewife Children	Swimming, Dance Exercise, Body Pump, Ice Skating (with children), Walking, Aqua Aerobics	Taking children Losing weight	Time Cost Lack of interest	Help with childcare Cheaper admissions	Average 45-50% zero days
09	9,471 (8.7%)	Kev Pub League Team Mates	Male 36-45 Single / married May have children Vocational	Football, Darts, Karate, Snooker, Weights, Boxing, Fishing, Pool, Ten Pin Bowling, Cricket	Competition Social Enjoyment (Itd) Perform	Time Slight cost factor	More free time Cost Facilities	Less active within group B Approx. 50% zero days
10	6,970 (6.4%)	Paula Stretched Single Mums	Female 26-35 Single Job seeker or part time low skilled	Swimming, Utility walking, Aerobics, Ice Skating	Lose weight Take children	Cost Lack of childcare Poor transport Lack of interest	Improved transport Cheaper admission Help with childcare Better facilities	Least active type within Group B Approx. 60% zero days
11	5,895 (5.4%)	Philip Comfortable Mid-Life Males	Male 46-55 Married Professional Older children	Sailing, Football, Badminton, Cycling, Gym, Jogging, Golf, Cricket	Social Taking children Improving performance Enjoyment	Time Lack of childcare	More free time Help with childcare	Most active within Group C Approx. 40% zero days

Segment	Total and (% of population in Norwich)	Forename & brief description	Gender/age/status	Sports Most Interested in	Motivations	Barriers	How to Increase Participation	Participation Profile
12	4,633 (4.3%)	Elaine Empty Nest Career Ladies	Female 46-55 Married Professional Children left home	Swimming, Walking, Aqua Aerobics, Step Machine, Yoga, Horse Riding, Pilates, Gym	Keeping fit Losing weight Help with injury	Time Lack of interest	Longer opening hours More people to go with	Reasonably active type 40-45% zero days
13	4,881 (4.5%)	Roger and Joy Early Retirement Couples	Male / female 56-65 Retired or part-time	Swimming, Walking, Aqua Aerobics, Bowls, Sailing, Golf, Shooting, Fishing, Racquet Sports	Keeping fit To help with injury Enjoyment Taking grandchildren	Poor health Lack of interest Transport	Better facilities Improved transport	Participate once or twice a week  50-55% zero days
14	6,152 (5.7%)	<b>Brenda</b> <b>Older Working Women</b>	<b>Female</b> <b>46-55</b> <b>Single / married</b> <b>May have children</b> <b>Low skilled worker</b>	<b>Swimming, Utility Walking, Dance Exercise, Aerobics, Step Machine, Keep fit</b>	<b>Weight Bring grandchildren Help with injury</b>	<b>Lack of interest Time</b>	<b>More free time Longer hours Cheaper admissions Help with childcare (for grand children)</b>	<b>Sometimes participates</b>  <b>60-65% zero days</b>
15	6,935 (6.4%)	Terry Local 'Old Boys'	Male age 56-65 Single / married Low skilled worker Job seeker	Fishing, Shooting, Pool, Utility walking, Darts, Snooker, Utility cycling	Help with injury Social	Poor health Lack of people to go with Cost	Subsidized admissions People to go with	Some low intensity participation  65-70% zero days
16	3,957 (3.6%)	Norma Later Life Ladies	Female 56-65 Single / married Low skilled worker Retired	Walking, Keep fit, Swimming, Aqua Aerobics	Help with injury or disability	Poor health Cost	Cheaper admissions People to go with	Lowest participation of Group C  75-80% zero days
17	2,158 (2%)	Ralph and Phyllis Comfortable Retired Couples	Male / female 65+ Married Retired	Bowls, Golf, Tennis, Table tennis, Snooker, Walking, Fishing, Swimming	Social Improve performance and keep fit Enjoyment	Transport Lack of people to go with	Improved transport More people to go with	Highest participation of Group D  Approx. 70% zero days
18	4,421 (4.1%)	Frank Twilight Year Gents	Male 66+ Married / single Retired	Bowls, Golf, Darts, Pool, Snooker, Walking, Fishing	Social Enjoyment	Poor health	Improved transport Cheaper admission	Medium participation for group D  75-80% zero days

Segment	Total and (% of population in Norwich)	Forename & brief description	Gender/age/status	Sports Most Interested in	Motivations	Barriers	How to Increase Participation	Participation Profile
19	10,470 (9.6%)	Elsie and Arnold Retirement Home Singles	Male / female 66+ Widowed Retired	Walking, Dancing, Bowls, Low-impact exercise	Social Help with injury	Health problems and disability	Improved transport People to go with	Lowest participation of Group D Approx. 85% zero days

### Summary of key findings from the market segmentation review of Norwich

93. The sporting participation and profile market segmentation findings indicate that:

- there are 5 dominate market segments across the middle super output areas in Norwich. The SPATIAL balance between the top 5 segments is very much focused on the Kev segment across the northern half of Norwich, with Jamie in the centre/east. These two segments dominate spatially. For both these segments football is the predominate activity, especially for Jamie where 40% of this segment play football compared to 4% nationally;
- in terms of gender there are 4 male 3 female segments and 1 male and female segments in the top 8 segments by population. The male segments make up 31.4% of the Norwich adult population. The female segments 19.9% of the adult population and the one male/female segment makes up 9.6% of the Norwich adult population. So in terms of population the male segments are higher in population and there is one more segment in the top eight segments by population numbers;
- in terms of age bands there is a very even spread of segments across the age bands. Only one age band which is in the 16 – 25 has two market segments. The other six segments are spread across the 26 – 65 age range. If there is a “bulge” it is in the 26 – 45 age range which has three segments;
- three of the top eight segments (Jamie Leanne and Tim) have a rate of sports participation which is higher than the national average, the remaining five segments participate on a national average or lower than national average rate of sports participation;
- motivations for Tim, Leanne and Jamie are to do more sport for healthy lifestyle reasons and for Jamie it is about the playing of team sports in organised and competitive league structures. The motivations to do more across the other main market segments are to do more activity for health/loss of weight/overcome injuries/more family based activities. This is particularly true of the female segments;
- barriers to increased activity centre around lack of time and work for the most active segments. Barriers for the less active segments are lack of time because of competing time commitments. Especially family and personal health or injury – very much for the older age groups;
- across all the segments there are very few facility barriers such as cost, programmes not at a time that suits, quality of facilities or lack of access;



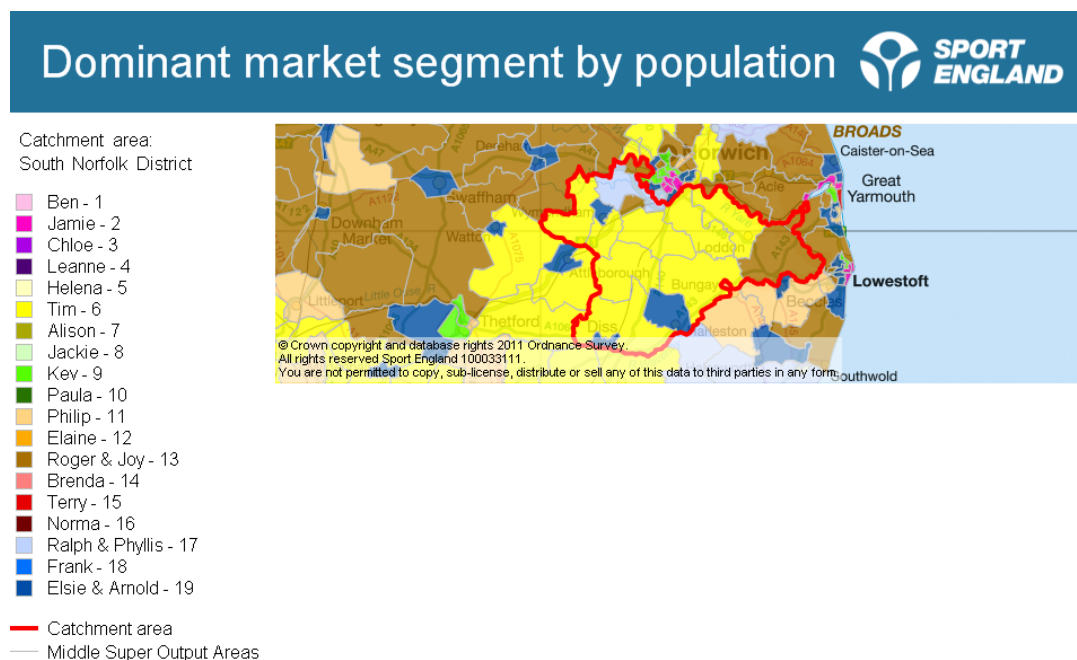
- Tim, and to a lesser extent, Jamie are the segments which play sport for sport purposes and want to improve performance and increase the range and types of sports they do. Norwich's sporting profile is more towards community based recreation for fitness, health and social activity; and
- sports/physical activities played which are common across most groups are swimming and keep fit/gym. Again the motivations for doing these sports/activities are for health and lifestyle reasons, especially losing weight. Playing of team sports is not a big feature at all. "Things done" are more individual activities or family based activities at recreational level rather than organised sport.

94. This ends the reporting on the profile of adult sports participation across Norwich.

### South Norfolk District profile of sports participation

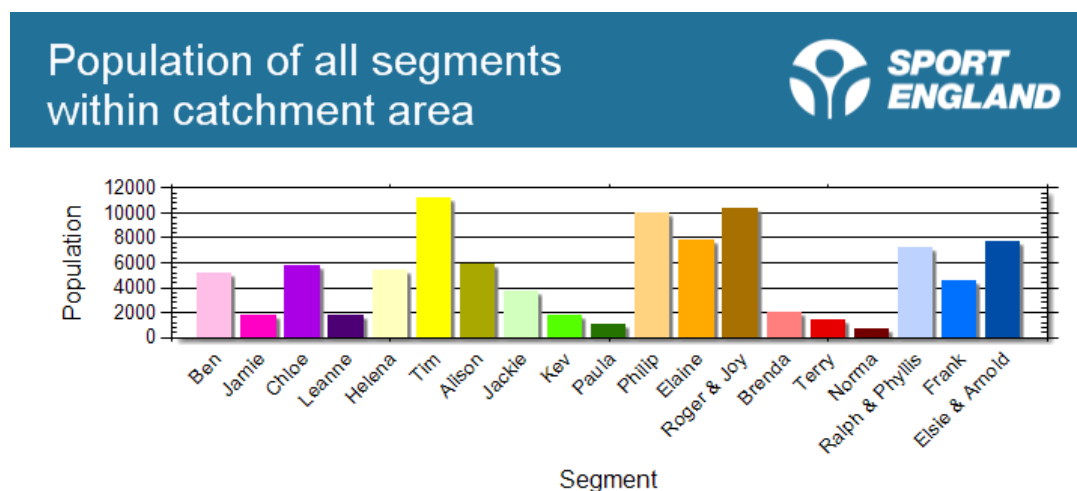
95. Finally, it is a review of the sports participation profile for south Norfolk District using the same sources of information as for Broadland and for Norwich.

### Map 9: Dominant market segments in South Norfolk by location



96. As Map 9 shows South Norfolk in terms of dominant market segments has one segment which is Tim (yellow) and this makes up around 80% of the land area of South Norfolk. There is a very small cluster of output areas in the north which are Ralph and Phyllis (shaded light blue) Area and two output areas for Elsie and Arnold (dark blue).

**Chart 7: Market Segments in by population in South Norfolk**



97. Chart 7 shows a different picture of population numbers for each segment than the spatial dominance of Tim. Whilst Tim is also the dominate segment in terms of numbers with 11,162 people and which is 11.7% of the South Norfolk adult population, there are two other segments with almost the same numbers as Tim. These are Roger and Joy with 10,412 people and 10.9% of the South Norfolk adult population, plus Philip with 9,982 people and 10.5% of the South Norfolk adult population.
98. By contrast the other dominant segments spatially have lower population numbers than these segments. Ralph and Phyllis have a population of 7,248 people and 7.6% of the population, whilst Elsie and Arnold have 7,716 people and 8.1% of the adult population.
99. The numbers and percentages for each of the top seven segments are set out in Table 12 below.

**Table 12: Population numbers and percentages for top seven markets segments in South Norfolk**

Name of Market Segment	Total population in South Norfolk of each segment	% of total adult (16+) population for each segment in South Norfolk
Tim	11,162	11.7%
Roger & Joy	10,412	10.9%
Philip	9,982	10.5%
Elaine	7,863	8.3%
Elsie & Arnold	7,716	8.1%
Ralph & Phyllis	7,248	7.6%
Chloe	5,774	6.1%
<b>Total</b>	<b>60,157</b>	<b>63.2%</b>

100. As the chart and table show:
- in terms of **gender** there are 2 male, 2 female segment and 3 male and female segments in the top seven segments by population. The two male segments make up 22. 2% of the South Norfolk adult population. The two female segments make

up a smaller 14.4% of the adult population. So quite an imbalance between the dominate market segments by gender in terms of population;

- the three older male/female top market segments make up 26.6% of the South Norfolk adult population. So a dominance of these segments in percentage terms and who are in the 55+ age groups;
- in terms of **age bands only one of the top seven dominate market segments, which is Chloe is below 26 years of age.** This is a similar finding as for Broadland, except none of the top seven dominate market segments in Broadland are below 26 years of age. The youngest segment in South Norfolk is Tim aged between 26 – 45. Tim's are the highest segment in terms of population numbers at 11,162, people which is 11.7% of the South Norfolk adult population;
- in terms of the 26 and under aged market segments there are 4 segments in this age band Ben, Jamie, Chloe and Leanne. Together all four segments total 14,425 people, which is 15.3% of the total adult population in South Norfolk. Ben and Jamie are the two segments with the highest rate of sports participation. Overall across the four segments this is a low total number and percentage of the population for the segments and age bands with the highest rates of sports participation;

the two male segments participate a lot in pitch sports, particularly football and adventure activity. Whilst the 2 female segments participate in swimming health and fitness/dance (see their sporting profile in Table 12 overleaf); and

- overall in **age bands** of the dominate market segments in South Norfolk are:
  - 1 in the 26 – 45 age group; (Leanne)
  - 1 in the 36 – 45 age group; (Tim)
  - 2 in the 46 – 55 age group; (Elaine and Philip)
  - 1 in the 56 – 65 age group; (Roger and Joy)
  - 2 in the 65+ age group; (Elsie and Arnold/ Ralph and Phyllis)

So 5 of the top 7 segments are in the 46+ age bands and only one is in the younger 26 – 35 age group.

101. The activities, key barriers and motivating factors for each of the top seven market segments for South Norfolk are in order of population numbers summarised below.

- **Segment 6 – Settling down males Tim (26 – 45)** Tim – is a very active type enjoying high intensity activities. Individuals in this segment are predominantly of White British (77%), or Other White (10%) origin; or may also be Asian/Asian British (6%), of Irish heritage (5%), Black/Black British (1%), Chinese (1%) or belong to another ethnic group (1%).

Tim enjoys technical sports such as skiing, uninhibited by financial outlay. Both team games and individual activities feature high on his agenda and personal fitness activities are also popular. 21% of the Tim segment take part in cycling compared to 9% of all adults nationally; 20% of this segment takes part in keep fit/gym, compared to 17% of all adults nationally. Swimming, football and athletics or running is also popular sports for Tim. Tim is more likely than all adults to take part

in football and athletics. Motivations for Tim to be more active include having more time and increasing personal performance. The main barrier is lack of time.

- **Segment 13 – Early retirement couples Roger and Joy (56 – 65)** Roger & Joy are slightly less active than the average adult population. Roger & Joy have below average levels of sports participation. 66% of this segment has done no sport in the past four weeks, compared with 60% of all adults. 38% have participated in sport at least once a week, which is consistent with other segments of the same age.

The top sports that Roger & Joy participate in are keep fit/gym and swimming which are the most popular sports with 13% of the segment doing these, followed by cycling with 8% of this segment doing cycling, golf with 6% of the segment playing golf and angling with 2% of this segment doing angling. Their participation levels are below average for all these sports, with the exception of golf and angling. Motivations to participate more are improving health and activity with family. Barriers to increased participation are transport/access and health.

- **Segment 11 – Comfortable Mid-Life Males Philip (46-55).** Philip is another relatively active segment and is the most active segment within this age group. He is likely to enjoy team sports such as football and cricket as well as indoor activities including badminton and gym-based activities. Like Tim, Philip is likely to be a member of a club and to take part in competitive sport. Motivations for this segment include meeting friends, taking children, keeping fit and enjoyment. Barriers include being too busy, particularly due to work commitments.
- **Segment 12 – Empty nest career ladies Elaine (45 – 54)** Elaine's sporting activity levels are consistent with the national average, and slightly above average for some indicators. 23% of Elaine's are likely to be a member of a health club and may also attend classes – 22% of this segment has received instruction in the past 12 months. The top sports that Elaine participates in are Keep fit/gym and swimming which are the most popular sports with around a fifth of the segment doing these, followed by cycling (7%), athletics or running (3%), **tennis** (2%), badminton (2%) and horse riding (2%). Motivations to participate more are keeping fit and losing weight. Barriers to increased participation are lack of time and interest.
- **Segment 19 – Retired Elsie and Arnold (65+)** Elsie & Arnold are much less active than the average adult population, but their activity levels are more consistent with other segments in this age range. They are likely to be doing less sport than 12 months ago, mainly due to health or injury. The top sports/activities that Elsie & Arnold participate in are walking, swimming, dancing, bowls and low impact exercise. 7% of this segment takes part in swimming, and 3% do bowls. Motivations to do more are improved transport and more people to do activity with. Barriers are age and health.
- **Segment 17 – Comfortable retired Couple Ralph and Phyllis (65+)** Ralph and Phyllis are generally less active than the average adult population, but their activity levels are higher than others in their age range. They are likely to be doing the same or less sport than 12 months ago, with health the main issue for those doing less. The top sports that Ralph & Phyllis participate in are 10% of this group take part in keep fit or gym, 9% swim, 7% play golf and 4% play bowls. Motivations to participate

more are keep fit, enjoyment, improve activity level. Barriers are lack of people to participate with and transport.

- **Segment 3 – Fitness class friend Chloe (16 – 25)** Chloe is an active type that takes part in sport on a regular basis. Chloe is the most active young female segment amongst the adult population, but she is less sporty than young, male segments Ben or Jamie. The top sports that Chloe participates in are: 28% of this group take part in 'keep fit and gym' compared to 17% of all adults; 24% take part in swimming compared to 14% of all adults; and 14% take part in athletics or running. She may also take part in horse riding, tennis and netball. Individuals in this segment are predominantly of White British 75%, or Other White 12% origin; or may also be Asian/Asian British 6%, of Irish heritage 5%, Black/Black British (2%, Chinese(1% or belong to another ethnic group 2%.

Motivations for Chloe are enjoyment 47%, keeping fit 45%, socialising 15% and losing weight (12%). Enjoyment and keeping fit are more significant motivating factors for Chloe than they are for all adults. Improving performance and 'training/taking part in competition' are much less relevant motivating factors for this segment.

Barriers for Chloe are 'Other factors' which is 30% of this segment. This includes 'left school', 'no opportunity', and 'economic/work reasons'. Family is a barrier for 20% of this sector compared to for 7% of all adults. 'Health, injury and disability' are considered a barrier to playing sport by 8% of this segment. Similarly 9% of this segment describes themselves as having a long-standing illness or disability.

102. Again to provide the rounded picture and profile of all 19 market segments, their population numbers, details of the sports/activities most likely to appeal to each segment as well as information on barriers and motivating factors affecting them are set out in Table 12 overleaf. The seven largest segments in South Norfolk in terms of population numbers and spatially are highlighted in blue.

**Table 12: Profile of all 19 market segments for South Norfolk**

Segment	Total and (% of population in SN)	Forename & brief description	Gender/age/status	Sports Most Interested in	Motivations	Barriers	How to Increase Participation	Participation Profile
01	5,101 (5.4%)	Ben Competitive Male Urbanites	Male 18-25 Single Graduate professional	Rugby, Squash, Windsurfing, Tennis, Cricket, Climbing, Gym, Football	Improving performance Training for competition Social Enjoyment Keep fit	Time Interest	Better facilities People to go with Improved transport	Most active in population Approx. 20% zero days
02	1,787 (1.9%)	Jamie Sports Team Drinkers	Male 18-25 Single Vocational Student	Basketball, Football, Weight Training, Badminton, Boxing, Martial Arts	Social Performance Competition	Time	Better facilities People to go with Longer opening hours	Second highest participation of all types Approx. 30% zero days
03	5,774 (6.1%)	Chloe Fitness Class Friends	Female 18-25 Single Graduate Professional	Body combat, Netball, Pilates, Running, Aqua Aerobics, Tennis, Gym, Swimming	Weight Fitness	Time	Cost Opening Hours Facilities People to go with	Active type 30-35% zero days
04	1,763 (1.9%)	Leanne Supportive Singles	Female 18-25 Single Likely to have children Student / part time vocational education	Swimming, Gym, Aerobics, Ice Skating, Dance Exercise, Body Pump, Utility Walking	Losing weight Activities for children	Health isn't good enough Time	Help with child care Longer opening hours Cost	Least active of A but does participate 40-45% zero days
05	5,348 (5.6%)	Helena Career Focused Females	Female 26-35 Single Full time professional	Gym, Road Running, Dance Exercise, Horse Riding, Skiing, Tai chi, Body Pump, Yoga	Losing weight Keeping fit Improving performance	Time People to go with	Longer opening hours People to go with	Very active type 30-35% zero days
06	11,162 (11.7%)	Tim Settling Down Males	Male 26-45 Single / married May have children Professional	Canoeing, Cricket, Cycling, Squash, Skiing, Golf, Football	Improve performance Keep fit Social	Time	More free time Help with childcare	Very active type 25-30% zero days

Segment	Total and (% of population in SN)	Forename & brief description	Gender/age/status	Sports Most Interested in	Motivations	Barriers	How to Increase Participation	Participation Profile
07	5,925 (6.2%)	Alison Stay at Home Mums	Female 36-45 Married Housewife Children	Swimming, Badminton, Aerobics, Pilates, Tennis, Cycling, Horse Riding, Exercise Bike	Taking children Losing weight Keeping fit	Time	Help with childcare Better facilities	Fairly active type 30-35% zero days
08	3,638 (3.8%)	Jackie Middle England Mums	Female 36-45 Married Part time skilled worker, housewife Children	Swimming, Dance Exercise, Body Pump, Ice Skating (with children), Walking, Aqua Aerobics	Taking children Losing weight	Time Cost Lack of interest	Help with childcare Cheaper admissions	Average 45-50% zero days
09	1,801 (1.9%)	Kev Pub League Team Mates	Male 36-45 Single / married May have children Vocational	Football, Darts, Karate, Snooker, Weights, Boxing, Fishing, Pool, Ten Pin Bowling, Cricket	Competition Social Enjoyment (ltd) Perform	Time Slight cost factor	More free time Cost Facilities	Less active within group B Approx. 50% zero days
10	1,031 (1.1%)	Paula Stretched Single Mums	Female 26-35 Single Job seeker or part time low skilled	Swimming, Utility walking, Aerobics, Ice Skating	Lose weight Take children	Cost Lack of childcare Poor transport Lack of interest	Improved transport Cheaper admission Help with childcare Better facilities	Least active type within Group B Approx. 60% zero days
11	9,982 (10.5%)	Philip Comfortable Mid-Life Males	Male 46-55 Married Professional Older children	Sailing, Football, Badminton, Cycling, Gym, Jogging, Golf, Cricket	Social Taking children Improving performance Enjoyment	Time Lack of childcare	More free time Help with childcare	Most active within Group C Approx. 40% zero days
12	7,863 (8.3%)	Elaine Empty Nest Career Ladies	Female 46-55 Married Professional Children left home	Swimming, Walking, Aqua Aerobics, Step Machine, Yoga, Horse Riding, Pilates, Gym	Keeping fit Losing weight Help with injury	Time Lack of interest	Longer opening hours More people to go with	Reasonably active type 40-45% zero days

Segment	Total and (% of population in SN)	Forename & brief description	Gender/age/status	Sports Most Interested in	Motivations	Barriers	How to Increase Participation	Participation Profile
13	10,412 (10.9%)	Roger and Joy Early Retirement Couples	Male / female 56-65 Retired or part-time	Swimming, Walking, Aqua Aerobics, Bowls, Sailing, Golf, Shooting, Fishing, Racquet Sports	Keeping fit To help with injury Enjoyment Taking grandchildren	Poor health Lack of interest Transport	Better facilities Improved transport	Participate once or twice a week  50-55% zero days
14	2,001 (2.1%)	Brenda Older Working Women	Female 46-55 Single / married May have children Low skilled worker	Swimming, Utility Walking, Dance Exercise, Aerobics, Step Machine, Keep fit	Weight Bring grandchildren Help with injury	Lack of interest Time	More free time Longer hours Cheaper admissions Help with childcare (for grand children)	Sometimes participates  60-65% zero days
15	1,442 (1.5%)	Terry Local 'Old Boys'	Male age 56-65 Single / married Low skilled worker Job seeker	Fishing, Shooting, Pool, Utility walking, Darts, Snooker, Utility cycling	Help with injury Social	Poor health Lack of people to go with Cost	Subsidised admissions People to go with	Some low intensity participation  65-70% zero days
16	704 (0.7%)	Norma Later Life Ladies	Female 56-65 Single / married Low skilled worker Retired	Walking, Keep fit, Swimming, Aqua Aerobics	Help with injury or disability	Poor health Cost	Cheaper admissions People to go with	Lowest participation of Group C  75-80% zero days
17	7,248 (7.6%)	Ralph and Phyllis Comfortable Retired Couples	Male / female 65+ Married Retired	Bowls, Golf, Tennis, Table tennis, Snooker, Walking, Fishing, Swimming	Social Improve performance and keep fit Enjoyment	Transport Lack of people to go with	Improved transport More people to go with	Highest participation of Group D  Approx. 70% zero days
18	4,515 (4.7%)	Frank Twilight Year Gents	Male 66+ Married / single Retired	Bowls, Golf, Darts, Pool, Snooker, Walking, Fishing	Social Enjoyment	Poor health	Improved transport Cheaper admission	Medium participation for group D  75-80% zero days
19	7,716 (8.1%)	Elsie and Arnold Retirement Home Singles	Male / female 66+ Widowed Retired	Walking, Dancing, Bowls, Low-impact exercise	Social Help with injury	Health problems and disability	Improved transport People to go with	Lowest participation of Group D  Approx. 85% zero days



## Summary of key findings from the market segmentation review of South Norfolk

103. The sporting participation and profile market segmentation findings across South Norfolk indicates that;

- **South Norfolk's participation profile has 3 dominate market segments spatially.** However the spatial balance is very much focused on one segment, this being Tim which is around 80% of the total land area of South Norfolk.
- **Tim is also the dominate segment in terms of population numbers with 11,162 people** and which is 11.7% of the South Norfolk adult population. However there are two other segments with a similar level of population as Tim, these being Roger and Joy with 10,412 people and 10.9% of the South Norfolk adult population, plus Philip with 9,982 people and 10.5% of the South Norfolk adult population.

By contrast the other dominant segments spatially have lower population numbers than these segments. Ralph and Phyllis have a population of 7,248 people and 7.6% of the population, whilst Elsie and Arnold have 7,716 people and 8.1% of the adult population.

- **In terms of gender there are 2 male 2 female segment and 3 male and female segments in the top seven segments by population.** The two male segments make up 22.2% of the South Norfolk adult population. The two female segments are a smaller 14.4% of the adult population. So quite an imbalance between the dominate market segments by gender in terms of population.

The three older male/female top market segments make up 26.6% of the South Norfolk adult population. So a dominance of the segments in percentage terms in the 55+ age groups.

- **Only one of the top seven dominate market segments, which is Chloe is below 26 years of age.** This is a similar finding as for Broadland, except none of the top seven dominate market segments in Broadland are below 26 years of age. The youngest segment in South Norfolk is Tim aged between 26 – 45. Tim's are the highest segment in terms of population numbers at 11,162, people which is 11.7% of the South Norfolk adult population.
- In terms of the 26 and under aged market segments there are 4 segments in this age band Ben, Jamie, Chloe and Leanne. Together all four segments total 14,425 people, which is 15.3% of the total adult population in South Norfolk. Ben and Jamie are the two segments with the highest rate of sports participation. Overall across the four segments this is a low total number and percentage of the population for the segments and age bands with the highest rates of sports participation.

The two male segments participate a lot in pitch sports, particularly football and adventure activity. Whilst the 2 female segments participate in swimming health and fitness/dance (see their sporting profile in Table 13 overleaf).

- Overall in **age bands** of the dominate market segments in South Norfolk are:
  - 1 in the 26 – 45 age group; (Leanne)

- 1 in the 36 – 45 age group; (Tim)
- 2 in the 46 – 55 age group; (Elaine and Philip)
- 1 in the 56 – 65 age group; (Roger and Joy)
- 2 in the 65+ age group; (Elsie and Arnold/ Ralph and Phyllis)

So 5 of the top 7 segments are in the 46+ age bands and only one is in the younger 26 – 35 age group.

- **Motivations which are consistent across the main market segments are to do more activity for personal health/loss of weight/overcome injuries.** This is particularly true of the joint female/male segments.
- **Barriers to increased activity focus on lack of time and personal health as the two main barriers.** Again and as with Broadlands barriers appear to be not so much sports based like lack of access to facilities at times which suit or the actual programmes of activity offered.
- **All of the top market segments, excepting Tim and Chloe play sport/do physical activity predominantly for recreational, keep fit/be more active and family based activity reasons.** Tim is the exception he plays sport for sports purposes and wants to improve performance and increase the range and types of sports he does. So overall in South Norfolk and again like Broadlands, the sporting profile is one of community based recreation for fitness, health and social activity.
- **Sports/physical activities played which are common across most groups are swimming and keep fit/gym.** Again the motivations for doing these sports/activities are for health and lifestyle reason. Playing of team sports in competitive organised structures is not a big feature at all. Neither of the two male segments, which are Ben and Jamie and who play pitch sports (40% of Jamie's play pitch sports compared with 4% nationally) have high numbers in South Norfolk, there are 5,100 Ben's and only 1,787 Jamie's. These two segments have the highest rate of participation across all 19 segments, so low numbers in these segments is challenging when trying to increase participation, as well as reflecting a lower borough demand total population for pitch sports.

104. This ends the reporting on the 2012 profile of adult sports participation across South Norfolk District.

#### **Overall summary of analysis of sports participation across each authority**

105. The overall summary of key headline findings on the evidence base for sports and physical activity participation across each of the three districts is set out at the conclusion of the reporting for each authority.