

It's time

Future forecasts for women's participation in sport and exercise

women's
SPORT
FITNESS
FOUNDATION



A Future Foundation report for The
Women's Sport and Fitness Foundation

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“I urge you to support the Women’s Sport and Fitness Foundation as they take their campaign forward. This is a great opportunity and we should all get behind it.”

Gordon Brown Prime Minister



Forewords

Sue Tibballs

Women's Sport and Fitness Foundation
Chief Executive

Our role at the WSFF is to make physical activity an integral part of every woman's life. We commissioned this research because we felt that the ways in which women participate in sport and exercise are not sufficiently understood. We were also interested to know what the future might hold if current levels of activity continue. We hope the forecast of a 5.5% decrease in activity levels by 2017 will alert Government, the sports sector, the health and education sectors and the media to the scale of this challenge.

We will be using this report to stimulate a debate in the sport sector and beyond about how more women and girls can be encouraged to become and stay active. Some ideas are given in this report, but in Spring '08 we will publish the first ever national strategy designed to achieve a step change in female participation.

We will authoritatively and creatively campaign to:

- Make sport as appealing to women and girls as it is to men and boys
- Make women aware of the importance of being active
- Make fit and healthy women and girls social and cultural role models

We will work in partnership with Government, business and the media to inform and influence policy, and we will provide consultancy and advice to those delivering sport and exercise to help ensure that what they do is designed with women in mind.

We know we can make a difference. But we cannot achieve this on our own.

If you share our vision and would like to help us achieve our goals, please do get in touch. Whether a potential partner, someone with a public profile, or a committed individual, we'd love to hear from you and have your support.



Cameron Walker

Scottish Widows

Director of Corporate Communications

Scottish Widows is proud to support the work of the Women's Sport and Fitness Foundation and excited to be involved in 'It's time', a project that aims to raise the profile of women's lack of participation in sport and fitness with Government, the media, the industry and consumers.

Scottish Widows and the WSFF have a shared interest in women's well-being and their long-term future. The WSFF would like to see more women physically active early in life and staying active throughout their life. Scottish Widows would like to see more women saving earlier in life to ensure a financially comfortable retirement. In short, we both believe that in order to keep fit physically and financially, preparation is everything.

Our partnership with the WSFF is a key strand in our programme of promoting health and well-being in the community, and sits alongside our role as Official Pensions and Investment Provider of the London 2012 Olympic and Paralympic Games.

The research being undertaken by the WSFF into the barriers preventing women from taking part in sport and fitness echoes the comprehensive body of research that Scottish Widows produces every year. In our annual Women and Pensions Report we explore the problems women face in saving for their retirement. It will be interesting to consider the parallels between these two issues of physical and financial health.

We hope that this report will be a significant step towards generating solutions to the challenge of raising women's participation levels in sport and fitness, and that through this the lives of women and girls across the UK will improve.

Executive summary

This report shows that there is a crisis in women's participation in sport and exercise: more than 80% of women are not doing enough physical activity to benefit their health. Young women aged 16 – 24 are nearly half as active as their male counterparts. The statistics are even worse for low income and black and minority ethnic women.

Forecasts in participation rates for women in the next ten years show an even gloomier picture: one forecast shows a potential fall of 5.5% by 2017. This could amount to 1.25 million fewer women being sufficiently active.

At the same time, three out of five women believe that they do enough exercise to be healthy, whereas in reality less than one in five are actually doing enough.

These figures come at a time when Sport England has pledged to increase participation in sport and exercise by 1% every year. A target of getting two million more people active by 2012 from low participation groups (including women) has been set.

To put this challenge in perspective, despite a significant rise in the number of women who think it's important to be healthy, there has been almost no change in the level of women's physical activity in the UK for the past 20 years.

Meanwhile, the public health threat from obesity has been recognised by the Government as “a potential crisis on the scale of climate change” and may cost the nation £46 billion by 2050.

Reversing this trend means better understanding how women participate in sport and exercise:

- Women **do** sport differently to men: twice as many men play competitive sports as women and almost six in ten women prefer to exercise rather than to play sport

It also means understanding the barriers to women's participation. Time, money and people to be active with all play a part. But the biggest barriers to women's participation in sport and exercise are cultural:

- Sport is still seen by some as unfeminine, and girls' earliest experiences of sport are off-putting
 - Nearly a quarter of women say that PE at school put them off sport
 - Two in five girls feel self-conscious about their bodies in PE lessons
 - Nearly half of all adults think that girls aren't given as much encouragement to play sport as boys
 - Almost two in five women believe there is too much emphasis on sport in society today
- Girls are raised to think it is more important to be attractive than active, and many women are inhibited from exercising because of low body confidence
 - Nine out of ten women believe there is too much pressure to be thin
 - A quarter of women agree that 'I hate the way I look when I exercise or play sport'
 - A third of 18-24 year olds and nearly half of 25-34 year olds feel under greater pressure to be thin than to be healthy

Government is facing up to the challenge of creating a fitter and healthier nation – and the London 2012 Olympics have been sold on a promise of a legacy of increased participation – but this report argues that it's time we faced up to the realities of trying to create a nation of more active women and girls.

It's time the sport sector viewed women on an equal basis as men.

It's time we made women aware of the importance of being active, and provided the activities and facilities that women want, where they want, and at the times they want.

It's time we took meaningful action to challenge a culture that allows girls to grow up believing it is more important to be thin than healthy.

Introduction

This report details the status and reasons for women's critically low levels of physical activity, and was commissioned by WSFF in order to create the debate that will lead to the first national strategy to increase women's participation.

It has never been timelier due to the obesity crisis, the ageing national population, higher reported levels of stress, the need to build stronger communities and the commitment from Government that the London 2012 Olympic and Paralympic Games will provide the legacy of a fitter, healthier nation.



1.1 Purpose of the report

This report seeks to:

- highlight the critically low levels of women's participation in sport and exercise
- understand and explain the reasons for this, detailing in particular the complex motivations that are specific to women
- predict the likely levels of women's participation ten years from now in 2017, taking into account a range of social, cultural and economic factors
- propose potential strategies to address the considerable challenges of increasing participation

1.2 Context: why this matters

It is undisputed that increasing participation in sport and exercise is good for our individual and national health in both the short- and long-term. Indeed, at no time previously has this been of more critical importance.

Public health crisis

Obesity has been recognised by the Government as posing a public health threat on the scale of climate change. In 2002, obesity cost the UK £7bn; at current rates of increase, this could rise to £46bn by 2050. In just 20 years from now it is predicted that seven out of every ten women will be overweight.

The World Health Organisation estimates that up to 8% of all deaths could be avoided through higher levels of exercise, with 37% of deaths from coronary heart disease specifically attributed to a lack of exercise.

As levels of mental illness rise, physical activity has been shown in several studies to be an effective anti-depressant in mild cases of depression, with girls in particular responding more strongly than boys in terms of short-term benefits.

Ageing population

An ageing population accentuates the need to promote greater health and well-being, as with increased longevity comes increased ill-health. The incidence of osteoporosis, for example – for which women are a high-risk group – is considerably reduced by physical activity. Alone, it currently costs the state some £1bn every year.

Social pressures

Concerns about crime, an increasingly multi-cultural society, higher divorce rates, more people living alone and employment migration place greater pressure on creating and maintaining strong communities. Sport and exercise have an important role to play as facilitators of social cohesion. Research conducted for this report shows that 84% of people believe that sport brings communities together.

2012 Legacy

The Government has made clear that the multi-billion pound investment in the London 2012 Olympic and Paralympic Games is predicated on being able to dramatically increase participation in sport and exercise, creating the legacy of a fitter, healthier nation.

A target of two million more people in low activity groups (including women) participating in three half hour sessions every week has been set for 2012.

Women and girls represent 51% of the UK population. Ensuring they increase their physical activity rates is essential to provide the intended legacy.

To put this challenge in perspective, there has been almost no change in the level of women's physical activity in Great Britain for the past 20 years.

1.3 Report methodology

1. Development of a comprehensive evidence base from existing research and a wide range of published studies both UK and internationally-focused
2. Re-analysis of the **Active People Survey** data. Active People is Sport England's survey into sport and fitness among people living in England, and with over 350,000 respondents is the most extensive survey ever conducted in the sector
3. Re-analysis of the **Taking Part Survey** data. Taking Part is a national survey of 29,000 people living in England, of participation across a number of cultural sectors including sport, the arts, museums and libraries. The survey is carried out by BMRB on behalf of DCMS and its partner public bodies, including Sport England
4. Original omnibus research by ICM among a representative sample of 2013 adults in October 2007
5. Exploration and evaluation of the key drivers determining levels of women's participation now and in the future
6. Creation of a quantitative model in order to allow for the forecast of future participation levels among women based on a range of assumptions

1.4 Report definitions

Physical activity

Physical activity in this report is defined as all sport and exercise in which women participate, including for instance, dance and yoga, but excluding non-dedicated fitness activities such as housework or gardening, or non active recreational activities such as snooker or darts.

Health-giving activity levels

Current government guidelines state that, to benefit health, five thirty-minute sessions of moderate intensity dedicated activity per week are required. Sport has been tasked with delivering three of these sessions.

Moderate intensity

'Moderate intensity' exercise is defined as resulting in: an increase in the breathing rate; an increase in the heart rate, to the level where the pulse can be felt, and feeling warmer, possibly accompanied by sweating on hot or humid days or indoors.

1.5 Survey definitions

The Active People Survey, records information on over 250 sports and recreational physical activities. Sport and active recreation includes traditional sports and fitness, such as football, recreational walking, swimming and aerobics as well as recreational physical activities such as darts and snooker. However, it excludes dance and non dedicated fitness activities such as housework or gardening.



Status: the participation crisis

There is a crisis in participation: more than 80% of women are not doing enough activity to benefit their health. Women's participation is markedly lower than men's and there are clear differences between men and women in their choice of activity, with twice as many men playing organised competitive sport than women.

Six in ten women prefer 'exercising' to playing sport and participation in team and competitive sports is exceptionally low. Despite the hard evidence to the contrary, 60% of women think they do enough exercise to be healthy exposing a serious gap between perception and reality.



2.1 Participation levels

Critically low levels of participation

- 81% of women (16.7 million) – four out of every five – do not do enough physical activity to benefit their health
- Just 19% (3.8 million women) take part in regular physical activity for thirty minutes three times per week

2.2 Analysis of activities

Preference for exercise rather than sport

- 60% of women prefer 'exercising' to playing sport

Top five activities

Most women choose physical activity which does not require joining a team and which is non-competitive. The five most popular activities are:

Walking	19%
Swimming	17%
Gym	10%
Recreational cycling	5%
Road running & jogging (and other athletics)	4%

Team and competitive sports

- Even the most popular team sport (and indeed the fastest growing) football, is played by only 1% of women. This makes it the 12th most popular activity, equal with Pilates
- Only one in ten women took part in organised competitive sport in the past twelve months

2.3 Gender differences

Significant differences exist between women's and men's participation levels and preferences.

- 24% of men do sufficient exercise to benefit their health, compared with 19% of women
- Twice as many men play organised competitive sport as women
- For men, the most popular sport to take part in is a team competitive sport – football at 13% – compared with 1% for women

2.4 Activity breakdown by groups

In addition to gender differences, significant differences in participation levels and preferences exist between different groups of women, although no single group as a whole does enough physical activity to benefit their health.

- **Younger women prefer team sports:**
17% of 16-24s play team sports, compared with the average across all women of 2.8%, although this falls to 10% from the age of 25
- **Girls become less active throughout their teens:** While boys retain a level of activity throughout their school life (70% of boys achieve at least 60 minutes of activity a day from age 8 to 16), girls' activity rates begin to fall from the age of 10 – by age 15 only half of girls achieve the target activity rate
- **Women in routine jobs are least active:** 85% of women in routine and semi-routine jobs (e.g. care assistants, shop assistants and cleaners) do not take part in regular activity

- Women in managerial and professional jobs are most active: more than a quarter take part in regular activity
- Black and ethnic minority groups are less active: 87% of Asian women and 86% of African and Caribbean do no regular activity, compared with 81% of white or mixed race groups
- Participation levels fall from aged 45: almost 60% of 16-24s do some activity (although not necessarily enough to benefit their health), with levels reducing only slightly until 45, when rates begin to fall significantly. By the age of 85 only 6% of women do any activity at all

“... at first, the transition between primary school and secondary school and doing PE was more or less the same - I still just got on with doing PE.... Then, when puberty really started to kick in, that's when I just didn't wanna do it any more.”
(16, School)

“Just because at school, you have to do it. There's a certain (um) time allocated to do it, but now I'm working full-time, it's - it gets to the evening, it's like, oh – what am I gonna do tonight? And you don't really feel like going and doing sport”
(17, Employed)

Understanding participation in sport:
What determines sports participation among 15-19 year old women?
Sport England, 2006

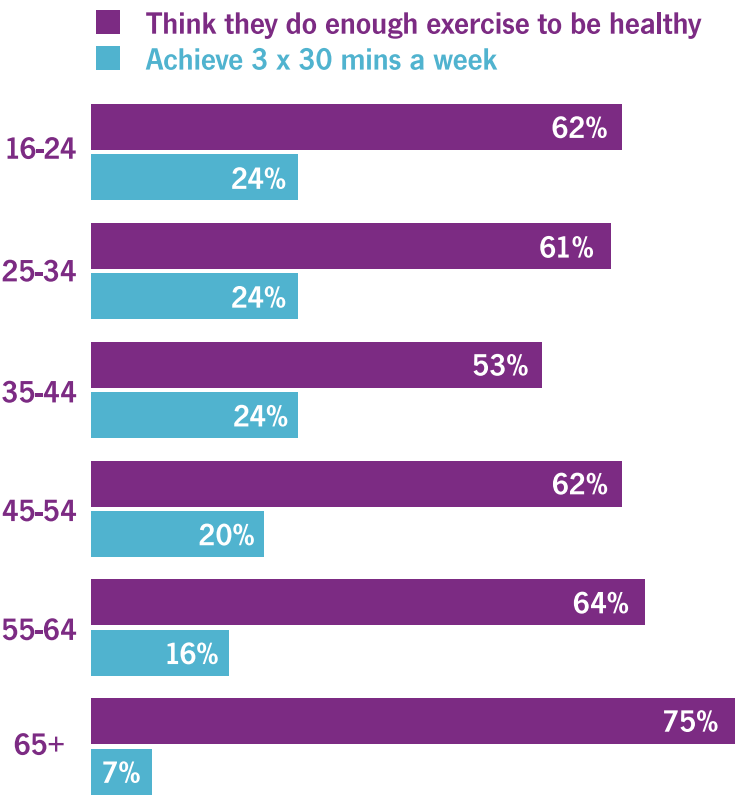
2.5 “Perception/reality” gap

Given these very low statistics for actual participation, it is salutary to note that in direct contrast to their actual levels of exercising, 60% of women believe that they get enough exercise to be healthy. In reality, this is true for just 19% of women.

The situation is most pronounced for women over 65 – those that do the least activity - of which three-quarters believe they do sufficient to benefit their health.

This represents an enormous gap between perception and reality, raising the question of how and why so many women think that they get enough exercise to be healthy. Are there, for instance, other activities in their daily lives that are contributing to their achieving greater fitness? Or are women unaware of the levels of activity recommended by current government guidelines?

Perception vs reality (by age)



Sources: ICM Omnibus Survey 2007/ Active People Survey 2006, Sport England
Base: UK/England, adults16+



Analysis: the key drivers of participation

The drivers of women's participation fall into four categories: age & life-stage; affluence & education; time-use; and individual motivation. Aside from gender, age and affluence are the greatest determinants of activity levels – the younger and more affluent you are, the more likely you are to exercise. However, time-use and individual motivation also have a significant effect. Some of the busiest women – professional working women – are also the most active. This could be seen as a reflection of high levels of motivation. Many of those who should be highly active – notably young women – are relatively inactive – a reflection perhaps of low body confidence amongst the young? While these four drivers need to be looked at together, what motivates women has not until now been properly understood or taken into account. Our evidence suggests that some cultural barriers are the most significant.



3.1 Introduction

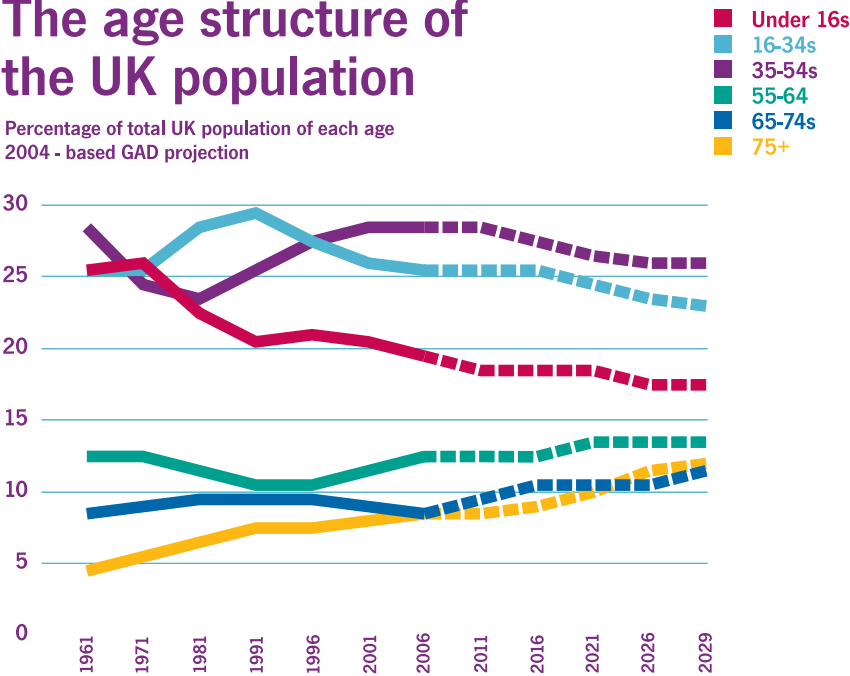
To understand why current levels of women’s participation are so low, it is necessary to explore the underlying drivers of actual behaviour in some detail. These create the basis for explaining the present picture and forecasting likely future levels of activity.

A complex mix of factors shapes activity patterns. These may be broadly divided into four areas: age and life stage, affluence and education, time and control, and underlying motivation, as represented in the schematic below.

The relationship between these factors is not necessarily clear cut: while age and life stage appear to be the most powerful predictor of likely activity overall, this can be strongly influenced by levels of education and affluence, so that some more affluent middle-aged and older women are able to maintain higher levels of activity than some of their younger and less affluent counterparts.

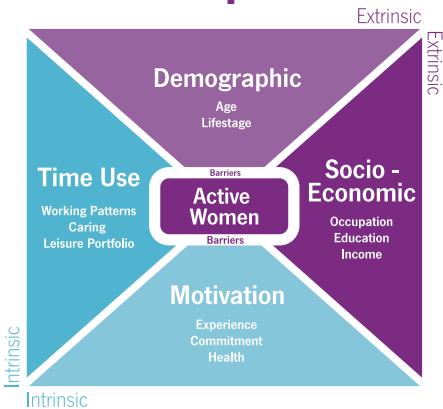
The age structure of the UK population

Percentage of total UK population of each age
2004 - based GAD projection



Source: Government Actuary's Department (www.gad.gov.uk/nVision Base: UK

Factors shaping exercise patterns



Time use and control are fundamental too: with growing pressures on women’s time from more work commitments, caring responsibilities and increased leisure options, the ability to ‘find time’ to exercise is critical.

What this report also shows in detail for the first time, however, is the impact of personal motivation, and the experiences that influence this. These range from the positive: coming from a sporty family and high levels of concern about health, for example. To the negative: a perception that sport and physical activity is unfeminine, and a lack of physical confidence to take part in sport.

These factors interact to create striking differences between activity levels for different groups of women. One clear implication of our analysis is that it will not be possible to define a ‘one size fits all’ solution in policy or delivery terms.

3.2 Age and life-stage

The facts of the ageing population are well known, with life expectancy having increased dramatically over the course of the last century and continuing to rise.

This disproportionately affects women who continue to live longer on average and make up a significant proportion of the population over 65, outnumbering men by three to one.

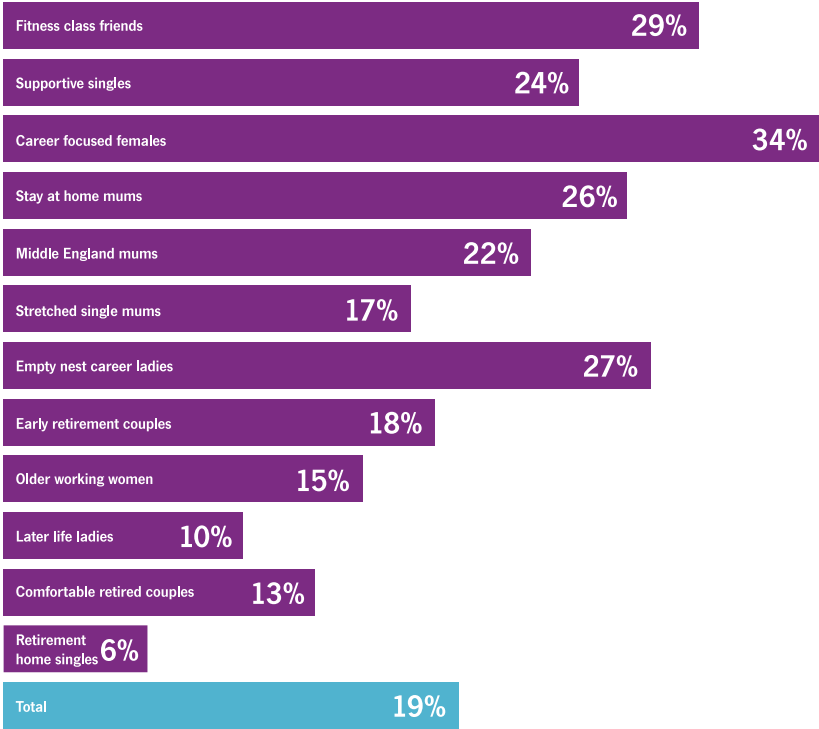
Levels of physical activity begin to fall sharply for women over the age of 45 and continue to decline, with just 6% of those over 85 doing any activity at all.

Although intimately interconnected with age, life-stage changes are also determined by the trends shaping family formation and relationships. These, in turn, are influenced strongly by changing gender roles, ideas about identity formation and a broader ‘culture of change’. This means that women’s identity is less predicated around their roles as wives and mothers than in the past.

Other trends such as families having fewer children and later in life, higher levels of divorce and separation (and more episodes in total because of our longer lives), mean that women are spending a smaller proportion of their lives in the core family and childrearing stages.

These changing trends have both positive and negative effects on women’s ability to exercise. It is clear that mothers with dependent children have the least discretionary time available - women are likely to experience a drop off in exercise levels at this point. However, the increased time outside of the family life stage should enable single and ‘child free’ women to exercise more than in the past. This seems already to have had a positive effect on the ‘empty nester’ career women.

Achieving 3x30 - by life-stage (Sport England segmentation)



Sources: Active People Survey, 2006, Sport England/Mosaic, Experian Base: England; adults 16+

3.3 Affluence and education

Women’s lives have been revolutionised in the last fifty years by their higher educational attainment and increasing participation in the workplace, which results in greater earning power and growing amounts of discretionary income.

Work is now a central feature of most women’s lives: not only do women enter the workplace in equal numbers to men, they are increasingly remaining in employment throughout their adult lives, so that now the majority of women remain in work during their childrearing years. For most working mothers, the resulting time pressures are the most extreme. Despite this, working women are more likely to exercise, particularly those in higher grade occupations.

A growing proportion of young women are now going onto degree level education. This too augurs well for exercise levels: with more education and presumably greater exposure to facilities and organised activities, this group should be one of the most likely of all to exercise, and remain active for life.

3.4 Time and control

Analysis of time use provides one of the most powerful means of gaining insight into the day-to-day lives of women, since it is here that the outcomes of competing demands and pressures are played out. The majority of women in the UK feel under time pressure with 66% agreeing that they never have enough time to get things done and, as noted above, this is most extreme among working women, and in particular, working mothers.

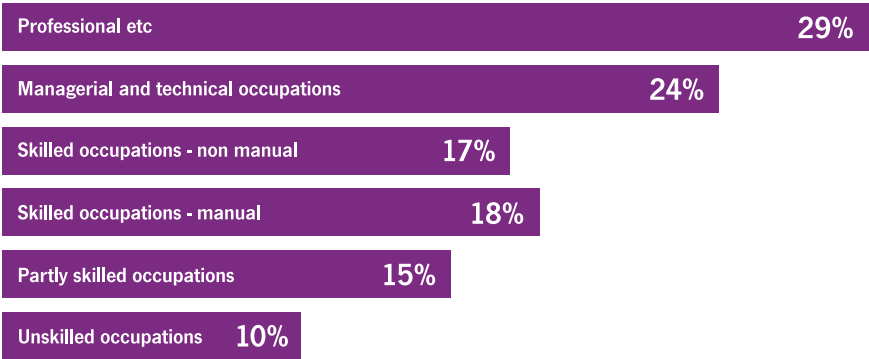
However, more recent analyses are pointing to a new source of pressure.

A consistent theme to emerge in the wider literature review of women’s exercise patterns across Europe is that sport and fitness activities have to be seen as just one part of an extended leisure portfolio enjoyed by affluent consumers in advanced consumer societies.

In fact, it may be this new, more realistic competitive ‘framing’ that can help to explain why participation itself is not increasing to the degree that other long term trends might predict.

The number and range of leisure activities has certainly increased – nearly doubling in the UK since 1970. With more choice available, it may be that the ‘just isn’t enough time to exercise’ excuse is a reflection on what Professor J. Gershuny has dubbed ‘busyness’ – the phenomenon of people using their jam-packed leisure time as a badge of honour.

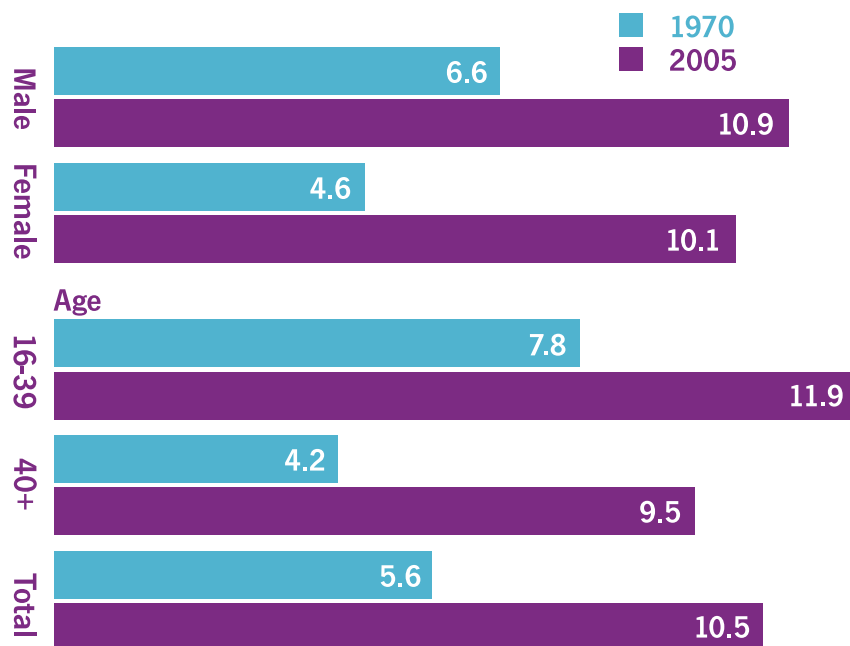
Women achieving 3x30 by profession



Source: Active People survey, 2006, Sport England/Mosaic, Experian **Base:** England; adults 16+

Out of home leisure participation

Number of different leisure activities people engage in during a twelve month period



Source: nVision Research/'The Symmetrical Family', 1970 Base: All respondents in London/South East; adults 16+

The reality is that, while many women have considerable amounts of discretionary leisure time (although still less than men), they have a wide range of other activities which they would rather prioritise.

The challenge then is to raise the enjoyment and reward profile of exercise versus this very wide range of other activities in which women now regularly participate.

"Just - I just don't have time, really. And if I did have the time, I'd just probably prefer to - to (um) go out with my friends or something, rather than - than (um) doing any sport, sort of thing." (19, Employed)

Understanding participation in sport: What determines sports participation among 15-19 year old women? Sport England, 2006

3.5 Motivation

Personal motivation is the most difficult driver to get to grips with, because it is by its very nature highly qualitative and hard to measure. However, from the original research conducted for this report, and from a number of in-depth research studies, there is ample evidence that all of the following have a significant impact on women's motivation to take part in sport and exercise.

3.5.1 Formative experiences of sport: it's for boys

It is an undisputed fact that the administration, leadership and media coverage of sport in the UK is dominated by men and men's sport. Just 29% of sports boards and committees are made-up of women and, in 2006, just 5% of sports newspaper coverage was dedicated to women's sports.

In the face of its domination of the media, 38% of women say that too much attention is paid to sport.

However, the perception that sport is for not for women begins with girls' earliest experiences of sport and exercise. Notably:

- 23% of women agree that PE at school put them off doing any sport
- 26% of women were never encouraged to play sport
- 42% of women and almost 50% of men believe that girls are not given as much encouragement as boys to do sport

There is also evidence that the sports traditionally provided by schools are not well suited to girls. While six in ten men (61%) strongly agree that 'I enjoy the competitiveness of sport' this compares with only one in three (36%) women. It is difficult to say whether this is the result of nature or nurture, but the effect is that many women have grown up feeling turned off from traditional sport.

Starting young

Only one girl in four believes it is 'cool' to be sporty and only 14% of boys and 27% of girls believe that 'being good at sport' is important for girls.
(Nike/Youth Sports Trust, 2000)

3.5.2 Body image and self-confidence

There is a fundamental mismatch between girls' views of their bodies' functions as passive and decorative, and the use of the body as active and functional in sport. Some girls say that they find an athletic, muscular body associated with sport undesirable and believe that it is inappropriate of them to develop one, as it appears masculine. Maybe not surprising when you consider 21% of men agree that 'being sporty is not feminine'.

One in five men think that women 'being sporty is not feminine'.
WSFF/Future Foundation, 2007

Many girls also dislike the practical requirement of having to alter their dress and appearance in a way that conflicts with their images of femininity in order to take part in PE.

- 30% of girls do not like their PE kit
- 40% of girls feel self-conscious about their bodies in PE lessons
- 26% of women 'hate the way that they look when they exercise/play sport'

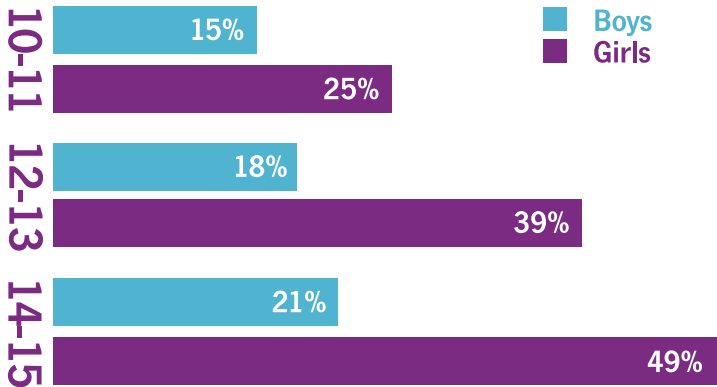
The pressure to be thin

These attitudes are set by a media-led society in which being thin has become culturally synonymous with being beautiful.

- Almost nine out of ten (88%) women believe that there is too much pressure to be thin
- 68% of women believe that the media, in particular, sets an unrealistic standard of beauty
- A third of 18-24 year olds and nearly half of 25-34 year olds feel under greater pressure to be thin than to be healthy

Women's concern with appearance starts young

Proportion saying they worry 'a lot'/'quite a lot' about 'the way you look', by age with gender



Source: Schools Health Unit/nVision, 2003 Base: UK; Pupils aged 10-15

Vicious circle

The consequence of these deep-rooted cultural issues is that, for girls and women, the relationship between body image and physical activity is a vicious circle: the more self-conscious they feel about their bodies, the less likely they are to take part in physical activity. And yet, participation has been proven to strengthen girls' psychological health, their self-confidence and positive body image.

42% of women feel that having more confidence in their body would help them play sport or exercise more

WSFF/Future Foundation, 2007

3.5.3 Perceptions of health

There is today a much higher level of awareness of the need to be fit to be healthy, and many women do participate in exercise primarily because of the health benefits. However, we also know that women seem to under-estimate the amount of exercise they need to do to maintain good health, with more than 80% of women doing too little activity to benefit their health. However, 86% said that they would exercise more if they thought their health was at risk suggesting a public awareness campaign could have a significant effect.

At the same time, a lack of fitness is for many women a barrier in itself to taking part. A third of women (33%) say that they feel too unfit to start exercising, no doubt associated for many with body confidence issues.

3.5.4 Enjoyment & socialising

Where women and girls do participate in sport and exercise, enjoyment and social inter-action are key positive motivators.

Women whose main motivation is enjoyment, rather than changing their weight, are far less likely to feel self-conscious about taking part and are also more likely to participate if the activity emphasises fun.

A key part of enjoying physical activity is the opportunity to exercise with friends. Women are more likely to participate if the activity provides the opportunity for social inter-action with friends and are less self-conscious when friends or family take part.

- 64% of women would exercise more if they had a friend to exercise or play sport with
- 61% of women would exercise more if there were more opportunities for families to exercise together

A conundrum unravelled...

This investigation into women's motivations helps provide an answer to a fundamental question: why, when increasing affluence, education and knowledge are generally resulting in more beneficial behaviours in developed markets, is exercise apparently bucking the trends? Why has it become 'de-coupled' from the positive drivers?

Our research suggests that a greater awareness of the need for exercise and its contribution to good health is being fundamentally undermined by a combination of cultural and time-related issues that make it extremely difficult for a significant proportion of women to get into the exercise 'habit'.

In short, a lack of motivation – or even worse a positive motivation not to exercise - is proving more powerful than the positive drivers of participation. In particular, entrenched and complex issues to do with femininity, body shape and confidence are paramount in determining actual behaviour.



The future: participation in 2017

Three forecasts for participation levels in ten years time have been modelled based on “future proofed” trends. The effects of the ageing population alone point towards a fall in women’s participation of 2.4%. The worst case scenario, taking into account issues including increasing obesity, time pressures, work intensity, stress, alcohol abuse and concerns about body image, suggest that this fall could in fact double – to 5.5%. Even in the best case scenario, giving greater weight to increases in positive trends such as health and environmental awareness, rising affluence and a growing leisure society, physical activity rates are likely to increase only 1.3% by 2017, well short of targets of 1% every year.

The implications for the nation’s health are critical unless dramatic action is taken now.



Future scenarios made simple

To establish a forecast for women's participation levels in ten years time, the Future Foundation created a model that incorporated the best quantitative evidence available and then fed in factors according to their relative importance to participation levels. In this way, three scenarios were created.

1) The ageing population scenario –

People are now living longer. Bearing in mind that older people tend to have low participation rates, what will our ageing population mean for women's participation?

2) The best case scenario – Giving greater emphasise to the positive future trends, how will growing concern with health and well-being and rising affluence affect women's likelihood to exercise?

3) The worst case scenario – Obesity is increasing, many women report that they are constantly time pressured, and body-confidence is at an all-time low for young women. How will these factors influence participation rates?

4.1 Developing a future view

Developing a view of the future has become increasingly important in public policy. The technique is used to identify the likely trajectory of current trends and help highlight the areas in which powerful interventions are needed to achieve a positive change.

For the first time, we believe, due to the extensive research base provided by the Active People Survey and the Taking Part Survey, it has been possible to consider the future course for women's activity levels through an innovative modelling process.

The outputs from the model have created a number of powerful forecasts that further emphasise the challenge of achieving any uplift in participation among women.

4.2 The ageing population scenario

The first step in the modelling process has been to apply demographic forecasts for the future age profile of women in order to create a view of what impact ageing will have on future participation, independent of other changes that might occur.

This confirms initial suspicions – if getting older (and associated life stage) is the strongest predictor of exercise levels declining - then the prognosis is not good.

The very fact that women are ageing (along with men, of course) points to a potential decline in activity rates of 2.4% across all women by 2017.

The forecasts for the ageing population of women naturally result in differential growth rates for different age groups, with the greatest increase in the middle-aged and older groups who are most influenced by the 'baby boomer bulge' – the result of peaking birth-rates in the post war decades up until 1964.

4.3 The best case scenario

To construct this scenario, eight current trends were identified as having most positive impact on women's participation. These were:

- Increased concern with health and well being
- Rising affluence
- Growing leisure society
- Demand for new experiences (the experience economy)
- Back to nature – desire to visit and walk in natural areas and parks
- Rebalancing gender – men are slowly taking on more responsibility for domestic tasks
- Greater longevity – people are staying healthier for longer
- More educated women

The effects of these trends were 'future-proofed' in a workshop setting – this means each trend was given a weight according to their potential future impact. This process was then fed into the forecasting model, using the best available quantitative proxies for their likely impact over the next ten years, to generate an estimate of the positive uplift created by changing conditions affecting women in the next decade.

In this scenario, participation among women is likely to grow in the next 10 years, but only very slightly. If trends such as more educated women and increased concern for health were to continue, then they would result in a 3.6% rise in participation levels by 2017. A very small increase and nowhere near hitting the 1% year on year target.

Once we offset the gains from the above analysis with the declines predicted as a result of women ageing, the true extent of the challenge facing WSFF and its partners is clearly drawn.

This tells us that without the effects of strong intervention, **overall growth in activity levels is likely to be no more than 1.3% by 2017.** This, alarmingly, is the best case scenario.

4.4 The worst case scenario

In reality, the positive trends identified above are not likely to completely outweigh the more negative trends such as growing obesity or the increased competition amongst leisure activities.

Therefore, in order to create a contrast to the more positive 'what if' scenarios, the Future Foundation developed a 'worst case' scenario. This highlights the potential impact of a range of negative factors that might both singly and in combination result in a tendency for women to exercise even less in the future.

Seven key factors were identified. They were:

- Body image issues and lack of confidence outweigh drive to be healthy
- Obesity in the 'obsegenic' society reducing ability to start exercising
- Stress and mental illness stopping women from having sufficient motivation and energy to exercise
- Time pressures increasing due to work intensification and continuing caring demands
- Growth in ethnic minority women as proportion of total
- Increased competition from other leisure activities
- Drinking culture – although the trends are generally downward, binge drinking will differentially impact some groups

These trends, added to the impact of the ageing female population, show the potential for the **overall level of participation to decrease across women by 5.5% by 2017.**

These negative trends have a particular impact on the younger age groups, with their levels of participation falling more than the average. Given young women aged 16 – 24 are already almost half as active as their male counterparts, this is a truly worrying picture. If we are going to raise future generations of girls who do aspire to be active, action to curb these negative influences needs to be urgently taken.



Solutions: what has to be done

A national, joined-up strategy for increasing women's participation is essential to achieve the step change in physical activity required for the health and well-being of the nation.

It must co-ordinate policy across the Government departments responsible for sport and exercise, health and education, encompass the worlds of sport and education and integrally involve the media and business. The very specific issues that relate to women and girls must be recognised and addressed, notably the cultural challenges of body image and self-confidence. Women and girls make up 51% of the population - this is not a niche or "equality" issue - rather one of understanding gender difference and formulating policy and changing behaviour accordingly.



5.1 National strategy for increasing women's participation

This report is designed to stimulate debate and serve as a catalyst to engage the necessary stakeholders to create a joined-up national strategy for increasing women's participation.

To be successful, the strategy must be owned by Government and translated into policy and its stakeholders should include:

- Government departments and public sector bodies responsible for sport, exercise, participation, health and education
- National Governing Bodies and those involved in the sports delivery system
- Schools, colleges and universities
- The media, notably in those responsible for sport, fitness, lifestyle, women's interest and the cultural portrayal of women
- Businesses, both as employers and those with an interest in physical activity, from sports provision to clothing and sponsorship

The Women's Sport and Fitness Foundation will initiate and co-ordinate the consultation process.

5.2 Understanding gender differences

If only one thing could be established from this report, it would be that it's time now to recognise the challenges that are unique to women and girls' participation and to structure policies accordingly. Women and girls make up 51% the population. Consequently, while by definition they are the majority group, more practically their issues can no longer be treated as "equality" or niche concerns.

Thus, successfully raising participation becomes a matter of accepting and understanding the nature of gender difference and intelligently applying the different and more complex approach this entails.

5.3 Suggested interventions

While by no means exhaustive, a series of proposals have been considered to contribute to the debate and consultation process designed to create ultimate policies and solutions.

Transition through life stage

Physical activity rates tend to fall at key transitional points in women's life-stage. This pattern could potentially be reversed if these junctures could be successfully addressed, these being:

- Keeping women active as they age
- Helping young women to exercise as they transition into the workplace
- The arrival and departure of children which are likely to happen later in women's lives as they postpone childbearing into their 30's
- More frequent house and job moves
- Partnership creation and break up (both of which are forecast to increase in the future)

Two specific groups of women have been identified as prime targets to achieve notable increases in participation.

i. "Baby boomers"

Increasing age points to declining levels of exercise. However, one of the groups with one of the highest levels of current participation is more affluent middle-aged, career orientated women, who have older children or are empty nesters.

This points to a very specific opportunity going forward. Essentially, given their numerical dominance and ageing profile within the population, if the baby boomer generation (born between 1946 and 1964 – so currently aged between 43 and 61) could be persuaded to maintain current levels of activity, this could create a valuable uplift on these growing segments in particular, with a 6.3% increase for overall participation rates by 2017.

ii. School leavers

A considerable uplift in participation could be achieved if young women aged 18–25 in 2017 could be persuaded to take their teenage exercise patterns with them into adult life. If half of current teenagers at school could be persuaded to continue with similar exercise levels as they move into tertiary education - and more than 50% will be remaining in education by this time - or into the workplace, the overall increase in exercise levels for women could be as high as 16.1% by 2017.

Further initiatives in these areas might include:

- Developing awareness raising, information and training on sport and fitness activities for those who provide retirement advice to the baby-boomers
- Identifying the values and attitudes that persist throughout the lifecycle and link to sport and exercise to make it less likely that participation will fall. For example, the persistence of environmental concerns that can be linked to use of bicycles or walking
- Developing an association between femininity and sport/fitness at a young age that goes beyond the link to body shape. This would be a long-term strategy that would make it less likely for activity levels to drop off in middle age or at the menopause or at other life-stage changes when concerns about emphasising femininity are increased
- Working with web sites and other providers of information about local areas – such as estate agents and local authorities – to emphasise sports and fitness facilities as important in selecting an area to live
- Offering free access to gym facilities during the day for women with young children at home
- Raising awareness about the association of physical activity with reductions in stress and amelioration of mental health pressures with counsellors, mediators and other intermediaries who have contact with women at critical life stage changes, such as divorce
- Ensuring that ‘bounty packs’ given to new mothers in hospitals contain incentives for participation in physical activity as well as the usual vouchers for baby milk etc.

Raising the appeal of exercise within leisure activities

In a more affluent consumer society, there is increased competition for women's leisure time from the growing array of leisure choices becoming available. Many of these choices will immediately be easier and more sociable than the prospect of undertaking moderate or vigorous intensity exercise for half an hour. Consequently, there is a clear challenge to make participation in physical activity more appealing or “competitive” compared with other potential choices. Statistics show that this could encompass the improvement of leisure facilities:

- Over six in ten (64%) women would exercise more if facilities were cheaper and there were more facilities in their local area
- More than half (55%) of women would exercise more if local facilities were of a better quality

Introducing flexibility through work and other leisure activities could be a major factor:

- Employers could be encouraged to provide more flexibility to employees who are willing to exercise during the day. Over three-quarters (77%) of mothers would like to fit exercise in with more flexible hours at work
- Extend the concept of the ‘workplace gym’ and the ‘corporate membership of health clubs’ from employer to providers of other leisure activities that women particularly participate in.
- More crèches at sports venues for young mothers and an increase in mother-and-baby activities, such as group walks of mothers with buggies accompanied by a fitness trainer and coach

Families and social networks

There is strong evidence that encouraging family and friendship groups to exercise together would be a persuasive and powerful strategy to increase women's participation:

- 81% of women with dependent children say that being able to exercise with family would encourage them to exercise more
- 61% of women without dependent children would exercise more if they had a friend to exercise with

Possible strategies to investigate include:

- Building exercise into school gate and babysitting networks
- Having parents agree to joint fitness activities that are aligned with the physical education curriculum. These could form part of parent-school partnership agreements to create a home learning and home fitness environment. Emphasis on mothers participating in exercise could also help break down the associations with physical activity being ‘masculine’
- Continuing the drive to extend use of school sporting facilities out to the community to enable family and friends to exercise together out of school hours
- Examining more fully how exercise activities could contribute to community development in poorer areas. For example, offering support packages to women active in their community

Conclusion

Body image and self-confidence

The Women's Sport and Fitness Foundation is planning additional, dedicated research into this crucial area in order to better inform the creation of what will prove pivotal strategies to raise participation.

It is anticipated that the findings will overlap with issues relating to the perceptions and reality of health and the disinclination of one third of women to exercise because they feel they aren't sufficiently fit.

Important elements of changing interpretations of femininity and emphasising the value of physical activity include:

- Working closely with the media to ensure that fit and healthy women are promoted as cultural role models. 75% of women wish the media did a better job in portraying the diversity of women's physical attractiveness, including size and shape, across all ages
- Linking exercise more explicitly to a general need that many women may have to feel that they are fulfilling their potential, particularly for low-paid female workers. Not only are many women working below their potential in low-paid part time jobs, but they are acutely aware of the fact. Physical fitness could compensate for this, with resultant psychological benefits

Social marketing aimed at behaviour change

A question that has recurred throughout this report is that of women's lack of awareness of current recommendations for physical activity. Our research shows that more than 80% of women do too little activity to benefit their health. However, 86% said that they would exercise more if they thought their health was at risk. We know that other social marketing campaigns achieve a higher level of market penetration among women than men. This would suggest a public awareness campaign that promotes the need for regular activity could have a real impact.

Success in raising women's participation in physical activity is dependent on fundamentally changing the behaviour of girls and women. This in turn will require changing the vast array of influencers that shape and determine the ultimate behaviour of girls and women themselves. This requires real commitment from the full range of stakeholders - Government, the sports sector, the private sector - particularly those who invest in sport, the media, and the voluntary and community sectors.

The London 2012 Olympic and Paralympic Games provides a once in a lifetime opportunity to create a step-change in women's participation. This report is a call to action.

It's time.



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