IRISH SPORTS MONITOR 2011 ANNUAL REPORT

THE IRISH SPORTS COUNCIL

AN CHOMHAIRLE SPÓIRT

Ipsos MRBI

Contents

Introduction

1. Introduction

This report provides the findings of the fourth wave of the Irish Sports Monitor (ISM). The ISM is designed to measure and monitor physical and social participation in sport and other forms of exercise. The survey sample is designed to be representative of the Irish population aged 16 and over, with interviews conducted by telephone throughout 2011. The survey uses large sample sizes to ensure robustness in the estimates both at an overall level and for key socio-demographic sub-groups. 8,749 interviews were conducted in 2011, with previous years based on similarly large samples (9,781 in 2007, 6,829 in 2008 and 9,767 in 2009).

Research of this nature is critical in meeting the core objective of the Irish Sports Council in planning, leading and co-ordinating the sustainable development of competitive and recreational sport in Ireland. It ensures the effective allocation of resources to maximise participation in sport which is paramount to developing a healthy population into the future. It also identifies emerging trends in sport that require attention, and facilitates sporting organisations in developing their respective sports and maximising the potential for participation in and enjoyment of those sports.

Over the past decade it has become somewhat of a cliché to say that Ireland is undergoing a period of unprecedented change. Arguably, however the downturn of recent years has altered the fundamental nature of Irish society. This has been felt across all aspects of life in Ireland, including sport and exercise. The declining fortunes of the Irish economy have put pressure on sports funding, both from central government and direct funding raised through those participating in sports. Many individual clubs and organisations across many types of sports have reported declining participation and social involvement, either through migration out of rural communities or reduced discretionary spending, meaning that members are forgoing their club memberships.

Participating in sporting activity provides a wide variety of physical, psychological and social benefits. The physical benefits are well understood and are a significant factor in controlling weight and offsetting longer-term health problems such as heart disease and Type 2 Diabetes. These benefits may never have been as important as they are today, and will be crucial in tackling obesity which is predicted will provide a significant challenge over the coming decades. The most recent Survey on Lifestyle and Nutrition found that over 6 in 10 Irish adults are obese or overweight, and with that research now five years old it is likely based on historic trends that this proportion has increased even further. The Minister for Health has tasked the Special Action Group on Obesity with identifying ways of addressing the problem of obesity, and physical activity is a core avenue of exploration. This research will be central in identifying key trends in terms of sedentarism, as well as specific groups that need to be facilitated in increasing their physical activity.

The social and psychological benefits of sport also provide significant benefit within Irish society, and sporting organisations have often been recognised as playing a strong role in maintaining community life. With the current recession having a significant impact on our psychological as well as financial health, effectively functioning sporting organisations are critical to providing an outlet to overcoming feelings of helplessness, depression and social exclusion for those finding themselves negatively affected by the outcomes of a declining economy.

This report is being published in an Olympic year, with the Games taking place very close to our shores. At the time of writing it is not known who will emerge as the sporting hero (both Irish and international), however he or she will inspire the elite athletes of the future to work hard and achieve success both on and off the field of play. Success at the elite end of sports, both locally and internationally, also encourages the next generation to get involved in sport to achieve what their sporting heroes have achieved. Having the right structures in place is fundamental to ensuring this success in the future.

1.1 Setting The Context

As this is the fourth wave of an ongoing series of studies, it is important that the results of the 2011 study are understood within the context of the previous waves.

The over-riding theme of the previous reports has been the impact of the recession on sports participation, and this report is no different in this regard. The effects of the downturn are felt as hard (if not harder) than in previous years. With little expectation that the Irish economy is going to improve considerably in the immediate future, focusing on the ongoing impact of the economic downturn is critically important.

Previous reports concluded that the recession impacted on sports participation in two competing ways – one negative and the other positive. The negative force came from decreased wealth meaning that individuals had to be more selective in terms of spending on sport, both in terms of club membership and associated costs such as equipment. Similarly this same dynamic was likely to impact on attendance at certain events where the costs of travel or admittance may have been prohibitive to frequent attendance.

However, a silver lining in the economic cloud was that many of those with an interest had more time to dedicate to sport. Sharp increases in the number of unemployed, and reduced working hours and commitments for many of those remaining in employment, meant that individuals had an opportunity to overcome what was perceived to be the most significant barrier to increased participation – a lack of free time. This was felt would not only impact on physical participation but also on social participation through more opportunities for voluntary activities or attending local community and sporting events.

The 2009 report also concluded that a significant challenge in the coming years would be to keep the young and unemployed involved in sports, both actively and socially. The report found declining club membership amongst the under 25s, noting that this was unlikely to improve unless significant actions were taken such as reducing membership fees for this particular group. It also noted that efforts to target sedentarism needed to target older people in low income groups as well as middle-aged men.

This report revisits many of these themes to explore how these issues have developed over the two years since the previous data were collected. In that relatively short time period, the Irish economy (and by extension, Irish society) has experienced further change. Two key statistics illustrate this quite starkly:

- The Standardised Unemployment Rate as measured by the Central Statistics Office rose from 11.8% in 2009 to 14.4% in 2011 (annual averages)
- Net emigration rose from 7,800 to 34,100 (preliminary figures) although much of this is driven by a sharp fall in immigration

It is crucial to consider that these dynamics do not affect all sectors of society equally, and evidence would suggest that younger males (who are more likely to be involved in sport) are disproportionately impacted. The challenges in ensuring a successful future for Irish sport are significant.

1.2 Implementing The 2011 Study

The 2011 study uses precisely the same survey methodology as previous waves of the ISM. In summary, a random series of landline telephone numbers are generated from “seed numbers” identified through a probability-based sampling process. Using these numbers, respondents are identified through quota sampling (age, gender and working status). In addition, interviews are spread across the year in order to avoid any seasonality effect. (Further detail on the methodology employed is provided in the Technical Report in the Appendix to this report).

In 2010 the Irish Sports Council appointed Ipsos MRBI as the data collection provider on the ISM (the previous versions all having been conducted by the Economic and Social Research Institute – ESRI). In order to minimise any impact of a supplier change, Ipsos MRBI consulted closely with the ESRI and the Irish Sports Council to ensure continuity and consistency in the survey methodology.

However, whilst most aspects of the methodology remained unchanged, one change was unavoidable. Ipsos MRBI conducts its telephone interviewing through a centralised Computer Assisted Telephone Interviewing (CATI) call centre monitored by supervisory staff whereas previous waves were conducted by interviewers calling from home using paper questionnaires.

As data were being collected it was observed that some of the results were significantly different to those seen in earlier waves. A number of initiatives were undertaken to explore potential reasons for the emerging differences, particularly to identify whether the differences were methodologically based. However none of the initiatives showed any methodological reasons for the significant differences observed.

Further details on these initiatives are outlined in the Technical Report.

2. Executive Summary

Sports Participation in 2011

- Participation in sports has risen considerably from 34% to 46%
- While participation in team sports has remained steady, participation in individual sports such as personal exercise, running, cycling and swimming have risen considerably
- Increases in participation are strongest amongst the younger (aged under 25) and the older (aged 55 or older) age groups
- Notable increase in participation amongst the unemployed
- A strong correlation between sports participation and socio-economic status and income with those in lower socio-economic and income groups less likely to participate

The Sporting Spectrum

- Exercise is now the most popular “sport” in Ireland, with 11% having participated in it within the previous 7 days. One in ten have participated in swimming
- Individual sports show stronger rises in participation than team sports, most notably running and cycling
- A strong correlation exists between socio economic status and individual sports, with those in higher groups more likely to participate in individual sports. This is particularly noteworthy in the case of running and personal exercise
- Only a small minority of those participating in some of the most popular sports are a member of a club associated with that sport

Broader Physical Activity

- Recreational walking remains the most popular form of physical activity measured on the ISM and is undertaken by two-thirds of the population

- Walking for transport is the only key metric on the ISM to have seen a decline in participation, perhaps due to fewer people travelling to work. It is likely this same dynamic has driven the increase in recreational walking as those unemployed replace walking for transport with recreational walking

- The proportion cycling for transport remains unchanged at 10%. It may be that the decline in the numbers travelling to work is offset by the success of initiatives such as the Cycle to Work and Dublin Bikes schemes

Hierarchy of Activity

- The proportion that is highly active has increased from 26% to 30% between 2009 and 2011, with the proportion that is sedentary declining from 16% to 13%

- A combination of activity categories is generally required in order to meet the recommended levels, with sport and recreational walking being the two activities that are most likely to deliver these levels of activity

- Over half of sports participants do not meet the national or international guidelines for physical activity, with soccer, golf and dancing prominent in terms of not delivering sufficient levels of activity to meet these guidelines

- Sixty-one percent would like to increase their current levels of activity, with swimming, walking and cycling being the most popular activities for increased participation

- A lack of free time remains the key barrier to increased participation levels among all activity groups

Sedentarism

- There is a notable rise in sedentarism for males in the 45-54 age group, but this does not occur amongst females until the 65+ age group
- Those with a monthly household income of less than €2,500 are significantly more likely to be sedentary than those on a monthly income of €5,500 or higher
- Sedentary behaviour is more likely in rural areas

Voluntary Activity

- The proportion volunteering for sport has increased from 7% to 15%
- Provision of transport and coaching are the two roles where voluntary activity has increased the most

Club Membership

- Club membership has increased from 32% to 38%
- Strongest increase in club membership levels is amongst the under 25 age group

Attendance at Sporting Events

- Attendance at a sporting event has increased from 17% to 22%
- The proportion attending a Gaelic Football match has increased from 6% to 8%

Sports Participation In 2011

3. Sports Participation In 2011

3.1 Introduction

This section of the report explores the extent of participation in sport in 2011, with comparisons to previous years where relevant. Within the ISM, **sport is defined as any physical activities that are undertaken for exercise, recreation or sport (excluding walking)**. As such it is based on how the respondent considers his/her activities within this definition.

Key results that emerge are:

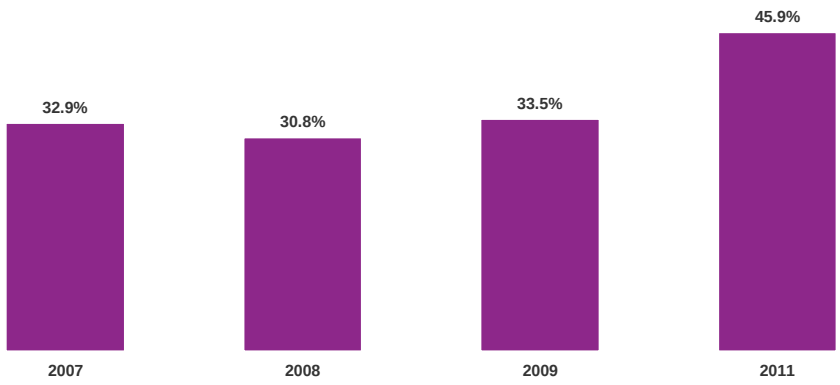
- Participation in sports has risen considerably from 34% to 46%
- While participation in team sports has remained steady, participation in individual sports such as personal exercise, running, cycling and swimming have risen considerably
- Increases in participation are strongest amongst the younger (aged under 25) and the older (aged 55 or older) age groups
- Notable increase in participation amongst the unemployed
- A strong correlation between sports participation and socio-economic status and income with those in lower socio-economic and income groups less likely to participate

3.2 Overview

The 2009 report noted a significant increase in sporting participation that was likely to be correlated with recessionary factors (most notably changes in employment status and reduced working hours). Given the acceleration in the recession that has been experienced during 2010 and 2011 and the resulting increase in free time for many groups it might be expected that participation levels would have increased further since 2009.

Figure 3.1 below indicates the proportion that have taken part in a sporting activity within the previous seven days. The difference between 2009 and 2011 rate is dramatic, suggesting an unprecedented change in physical activity in a relatively short period of time.

Figure 3.1 Proportion participating in sport



Before exploring the nature of the change in participation across different groups, it is crucial to consider a key dynamic that places the increase in participation in context.

The sports that are increasing in popularity faster than other sports tend to be those that are played on an individual basis (e.g. personal exercise, running, cycling and swimming) as opposed to team sports such as GAA sports, soccer and rugby. This is evidenced quite clearly in figure 3.2 which indicates the dramatic difference in the proportion playing individual sports compared with previous years. In the 2011 survey, 39% identified that they play a sport that can be categorised as being played on an individual basis, compared to 26% in the 2009 survey. On the other hand, the change in the participation in team sports is less dramatic, from 10% in 2009 to 12% in the 2011 survey.

Figure 3.2 – Proportion participating in individual and team sports

As the ISM does not specifically measure motivations for participating in sport, it is only possible to speculate as to what may be driving this climb in participation in individual sports and exercise. Some evidence may be obtainable through the 2006 CSO survey on Sport and Physical Exercise[1]. This survey presents a variety of reasons as to why people take part in sport including health benefits, social element and participating in competitions. By their very nature, individual sports may offer a flexible and easy path into sport for those seeking to improve their health and fitness, and who may have been inactive for a period of time.

Many of these individual sports may take place in social settings (for example, running with a Meet and Train group or cycling with friends/family) however the main focus is on the individual rather than the collective. A key consideration that this raises is that much of this individual activity would be below the radar and would not necessarily be reflected in statistics produced by sporting organisations, through either membership or competition entrant numbers. Instead, a lot of the participation will be invisible and outside of a club setting. This is explored in more detail in the next section.

[1] CSO Quarterly National Household Survey – Quarter 3 2006

3.3 Sports Participation Amongst Different Groups

Age and gender are two of the demographic factors most strongly correlated with sports participation – males are more likely than females to be active participants, and participation levels tend to decline across older age groups (with the rate of decline broadly equal across both males and females). However, it is within gender and age cohorts that the most notable change in sports participation is evident.

Figure 3.3 overleaf illustrates the participation levels for each age group, and whilst the difference is substantial across all age groups it is particularly notable amongst the younger and older age groups. Furthermore the increases in most cases are stronger for females than those seen for males.

A number of factors are likely to explain these changes, with recessionary factors being the common thread. Significant unemployment amongst younger individuals is likely to have dramatically increased the amount of free time available to this group which they can dedicate to sporting activity. Those aged between 25 and 54, whilst also perhaps having more free time, may be constrained by family responsibilities in dedicating this free time to sport. What may be occurring within this group is that increased free time is leading to a change in distribution of household responsibilities. This perhaps explains why the increases in sports participation are stronger for females in this age group than it is for males.

The increases amongst older individuals are likely to be explained by a number of dynamics. Previous research[2] has suggested that a longer-term effect is likely to be contributing to this, with current and future older age groups more likely to play more sport or be more active than historically. In addition, as with other groups it is likely that the recession has also provided this age group with increased free time. However this additional free time is less likely to be as restricted by child minding responsibilities than it is for those in younger age groups, thus allowing for greater flexibility in sporting activity. Exploring the nature of the activity amongst older age groups (see section 6) highlights that it is focussed on lower intensity activities such as dancing or golf, which may not provide a sufficient level of physical activity to meet the National Physical Activity and World Health Organisation guidelines.[3]

[2] Sporting Lives: An Analysis of a Lifetime of Irish Sport (ESRI, 2008)
[3] These guidelines are based around individuals conducting at least 30 minutes moderate intensity activity on at least 5 days per week

Figure 3.3 Participation in sport by age

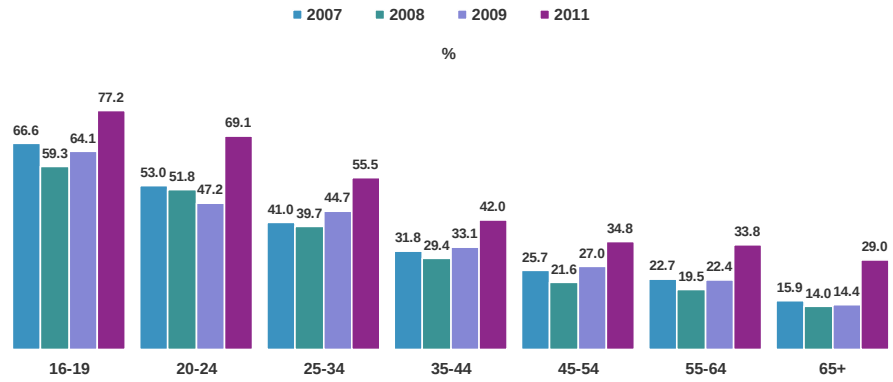


Figure 3.3.1 Participation in sport by age - Males

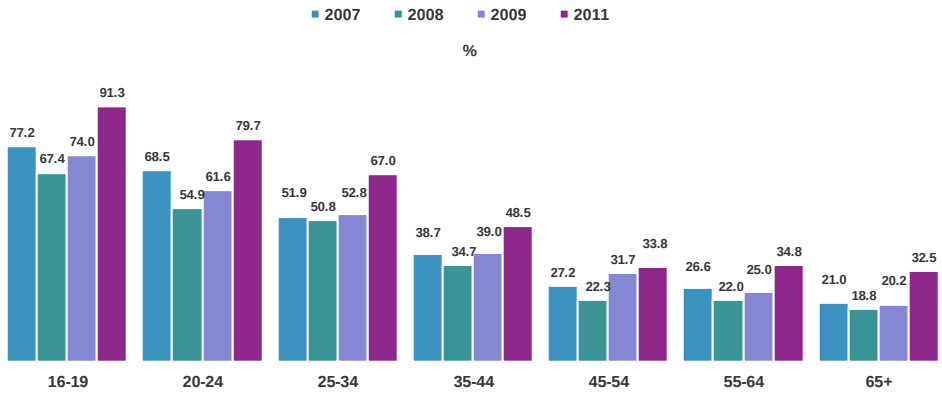
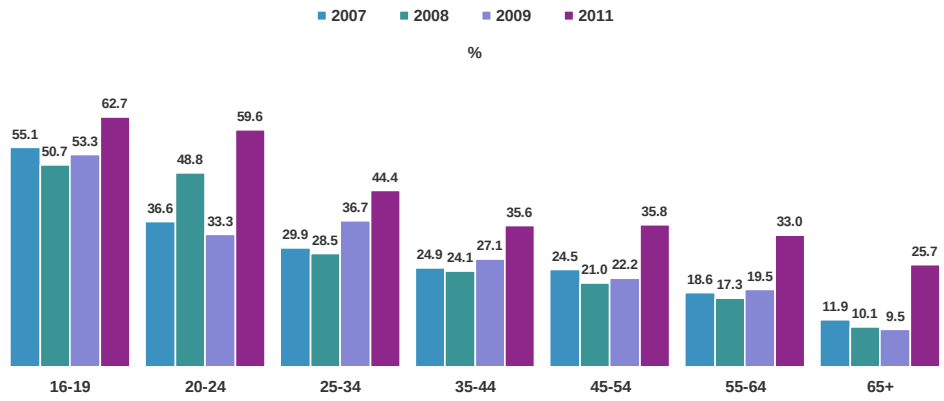
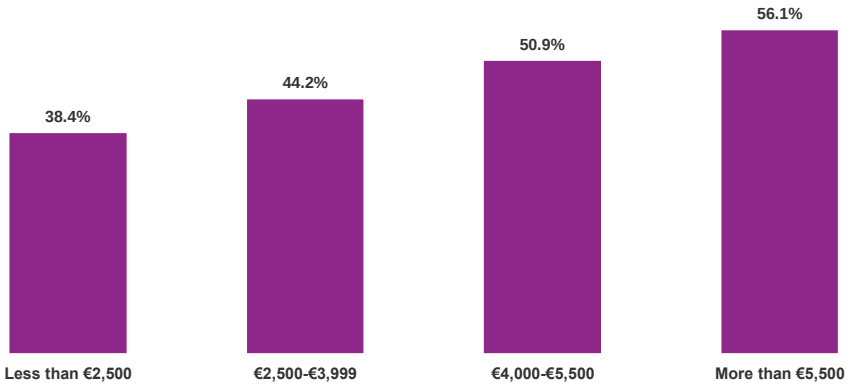


Figure 3.3.2 Participation in sport by age – Females



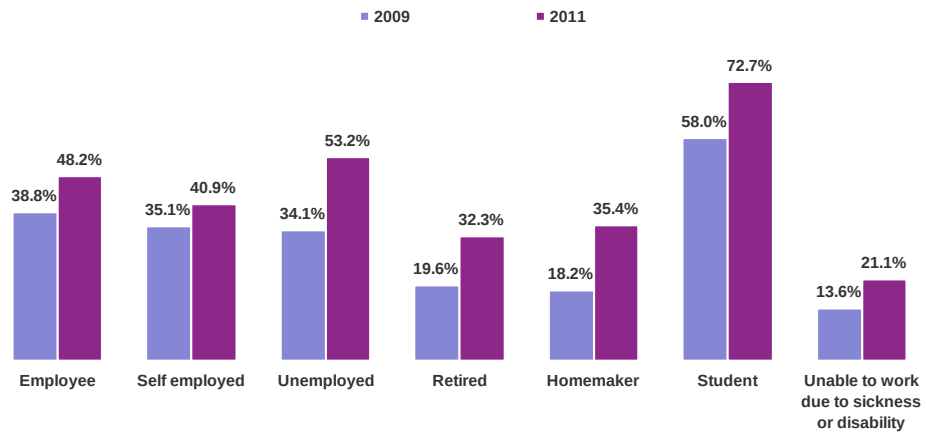
A key finding of the 2009 report was a strengthening of the relationship between income and playing sport due to recessionary forces, resulting in a widening of the gap between those in employment and those who are unemployed, as well as between higher and lower income groups (i.e. those in employment and earning higher incomes were more likely to actively participate in sport). In terms of income the difference is particularly strong with 38% of those in the lowest income bracket playing sport compared with 56% of those in the highest bracket (figure 3.4).

Figure 3.4 Participation in sport by household income



Given the further weakening in the economic environment and resulting increased unemployment since that period, an analysis of the correlation between employment status and sporting participation would be expected to be particularly revealing in terms of explaining the overall difference in participation levels. This is highlighted in figure 3.5 overleaf, which shows the proportion of the unemployed who are active in sports increasing from around a third (34%) of those who are unemployed to just over a half (53%).

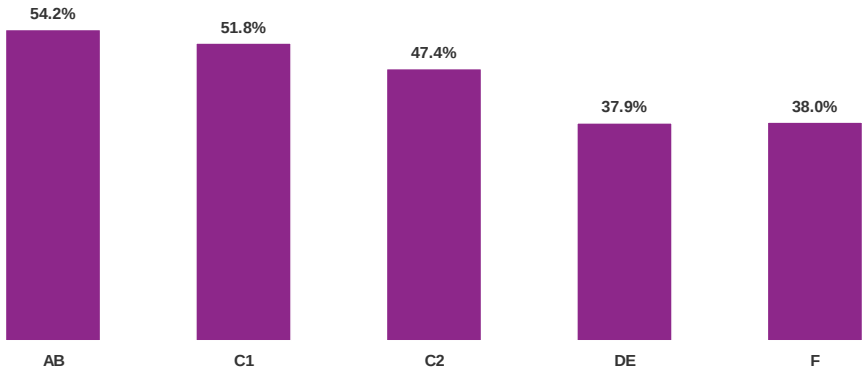
Figure 3.5 – Participation in sport by working status



The 2011 survey categorises respondents into socio-economic groupings using the standardised classification used across the research industry. This classification system is based on the employment status and occupation of the chief income earner within the household within which the respondent lives. Respondents are categorised as A, B, C1, C2, D, E, F, with A indicating the highest socio-economic group and E being the lowest (F is a specific category used to indicate the farming community). This provides a straightforward analysis dimension to explore differences that may arise due to socio-economic differences, rather than simply economic differences.

Figure 3.6 illustrates the participation levels across individual socio-economic groupings. As standard in order to provide a robust sample and due to general similarities between the groups, the A and B categories are combined, as are the D and E categories.

Figure 3.6 – Participation in sport by socio-economic grouping



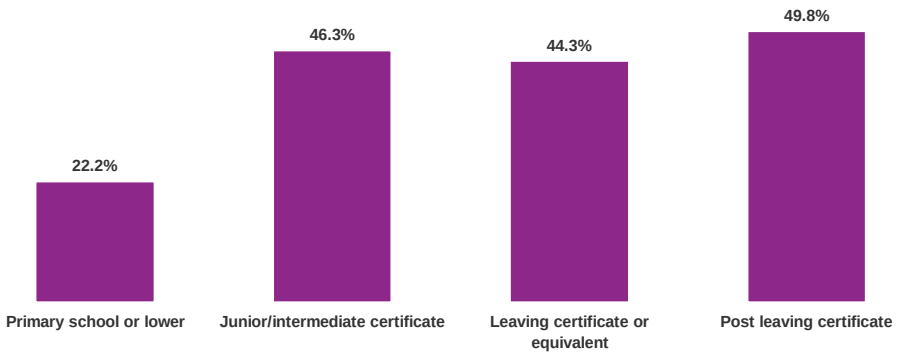
This indicates that there is a strong degree of correlation between socio-economic status and participation in sport with those in the AB socio-economic grouping (professionals and management) significantly more likely to participate in sport than those in the C2 (skilled manual workers) and DE groupings (semi-skilled or unskilled manual roles or on long-term state benefits).

There is no single factor that is likely to explain these differences, and it is likely to be explained by both economic and social factors that are beyond the scope of this research. However, initiatives undertaken to increase the levels of physical activity within the population will need to consider the differences that exist across these social gradients. In order to ensure the benefits of physical exercise are enjoyed across the population, further understanding is required on how to overcome specific barriers that may limit physical activity amongst lower socio-economic groups.

The lower participation levels within the F group are likely to be explained by the impact of living in a rural location and having more restricted access to facilities, and this theme is explored in more detail later in this report (Section 6). The study also demonstrates strong differences across the socio-economic groups in terms of the type of sporting activity being participated in, with the next section focusing on this issue in more detail.

In the context of the strong link between socio-economic grouping and sports participation, an analysis of any link to level of education is worthwhile (figure 3.7). Whilst those with the lowest levels of education are much less likely to take part in sport than those with post-primary level, the difference across the other groups is not particularly notable. Indeed, it may be more likely to be a function of age rather than level of education. However, the 2011 data does not permit a distinction between different types of education beyond Leaving Certificate (e.g. technical versus degree level) where previous studies have found differentiation in terms of sports participation.

Figure 3.7 – Participation in sport by level of education



3.4 Summary

The latest wave of the ISM suggests that the nature of sports participation has changed radically over the past two years. This represents something of a silver lining in the current climate with people using increased free time to invest into sporting activities. This is particularly evident amongst the younger and older age groups, however is not as strong for those aged in their 30s and 40s. This may be perhaps because they are not as time-rich, either due to family or work commitments.

Other factors also need to be considered, and the success of initiatives undertaken by various organisations, including Local Sports Partnerships, may be bearing fruit through the increased participation amongst middle-aged women and older age groups.

Despite this, a significant social gradient remains in terms of sports participation, with those in less advantaged groups being less likely to participate in sport. A variety of factors (both social and economic) is likely to be limiting sporting behaviour within these groups, and as a result potential solutions will not be simple or straightforward in nature.

The Sporting Spectrum

4. The Sporting Spectrum

4.1 Introduction

This section of the report focuses on the types of sports being played in Ireland and the context in which they are being played. In addition, it examines how different sports appeal to different socio-demographic groups. As noted in the previous section, the definition of sport is deliberately broad, and respondents can include any behaviour (excluding walking) that they consider to be sport. A total of 170 different activities were reported during fieldwork on the 2011 survey.

Key results that emerge are:

- Exercise is now the most popular "sport" in Ireland, with 11% having participated in it within the previous 7 days. One in ten have participated in swimming

- Individual sports show stronger rises in participation than team sports, most notably running and cycling

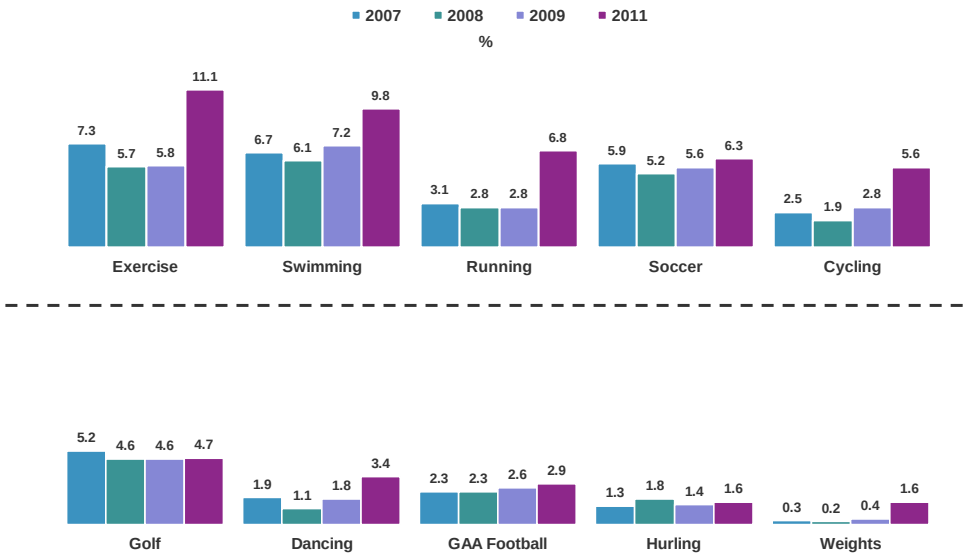
- A strong correlation exists between socio economic status and individual sports, with those in higher groups more likely to participate in individual sports. This is particularly noteworthy in the case of running and personal exercise

- Only a small minority of those participating in some of the most popular sports are a member of a club associated with that sport

Overview

Figure 4.1 below illustrates the participation levels for the top 10 sports in 2011 relative to 2007, 2008 and 2009. Despite fundamental differences in the level of sporting participation between the 2011 and previous surveys, it is revealing that the types of sports and the order in which they appear are broadly consistent with previous years.

Figure 4.1 – Types of sports participated in



Personal exercise (which is predominantly accounted for by gym activities)[4] is now the most popular sport in Ireland, regaining the position it lost in the 2008 survey. The other notable change is that running, which was consistently the fifth most popular sport, now becomes the third most popular sport. In the case of the latter, increased participation levels would be expected for this sport, both in terms of recreational running (as has been reported anecdotally with the claimed emergence of another running boom in Ireland), as well as competitive running (for example, events such as the Dublin Marathon reporting considerable increases in entrants in recent years). Initiatives such as the Meet & Train programmes through the Local Sports Partnership network and also the An Post Cycle Series are also likely to have made a contribution to the increases seen in running and cycling.

A further key difference between the two surveys is the number of sports identified on the survey. In order to quantify the full spectrum of sporting behaviour, respondents could identify up to three sports that they had participated in within the previous seven days. In the 2011 survey, 17% identified more than one sport compared to 7% in the 2009 survey. As a result, not only are there more respondents identifying that they participate in sport but also those participating in sport are identifying more sports that they participate in. The impact of this on participation levels for specific sports is considerable, both in terms of popular sports (as detailed above) and minority sports (the 2011 survey identifies 47 individual sports as having participation levels of less than 1%, 14 of which are not identified in the 2009 survey).

4.2 Participation Differences By Gender

Previous reports have identified the difference between genders, both in terms of overall participation levels as well as the types of sports being participated in. Males are much more likely to participate in sporting activity than women – 52% compared to 40%. In addition, the nature of this participation differs strongly, with team sports being more prominent amongst those played by males and individual sports dominating those played by females.

Figure 4.2 details the top 10 sports for males and females, showing comparative trends back to 2007. As with the overall figures, the types of sport included are consistent with 2009, the only exception being weights being among the ten most popular sport for males.

[4] 7% say they have visited a gym in the previous 7 days. Other activities contributing towards exercise include aerobics, exercise machines, spinning, floor exercise, and circuit training. Each of these accounts for approximately 1% of participation, with more minor activities also making a contribution.

Figure 4.2.1 – Type of sports participated in (Males)

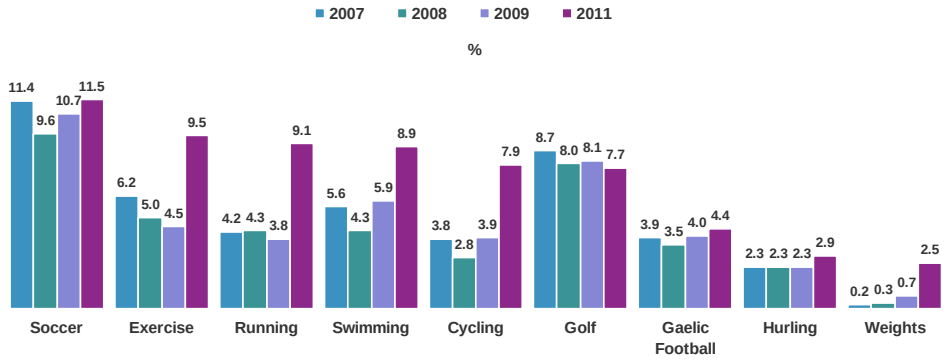
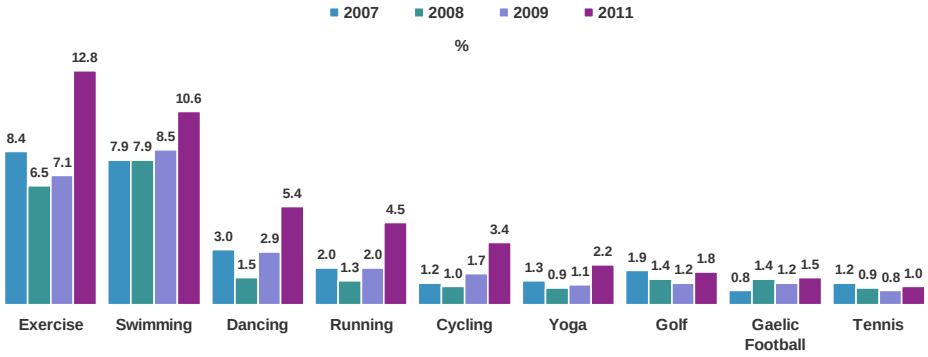


Figure 4.2.2 – Type of sports participated in (Females)



Soccer remains the most popular sport for males and the proportion playing (12%) is slightly higher than the comparative figure in 2009. However, significant changes in some of the individual-based sports, most notably running, cycling, exercise and swimming, means that the differences in participation levels between the six most popular sports is narrower than previously.

Exercise becomes the most popular sport for females for the first time since the 2007 study, with 13% participating in the previous seven days. Female sport remains dominated by two activities – exercise and swimming. As illustrated in figure 4.3 below and overleaf, female sport is also dominated by individual activities, with only 5% claiming to be involved in a team activity. In contrast, one in five males plays a team sport, with twice as many as this involved in an individual sport.

Figure 4.3.1 – Individual and team sports (Males)

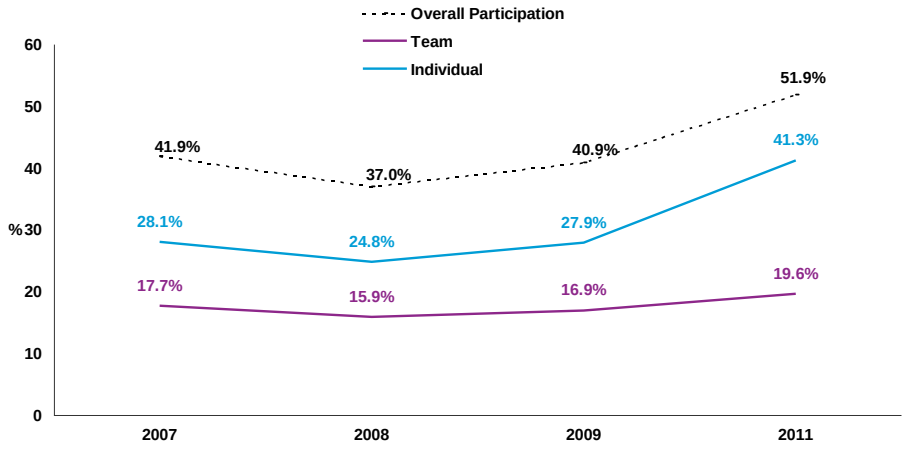
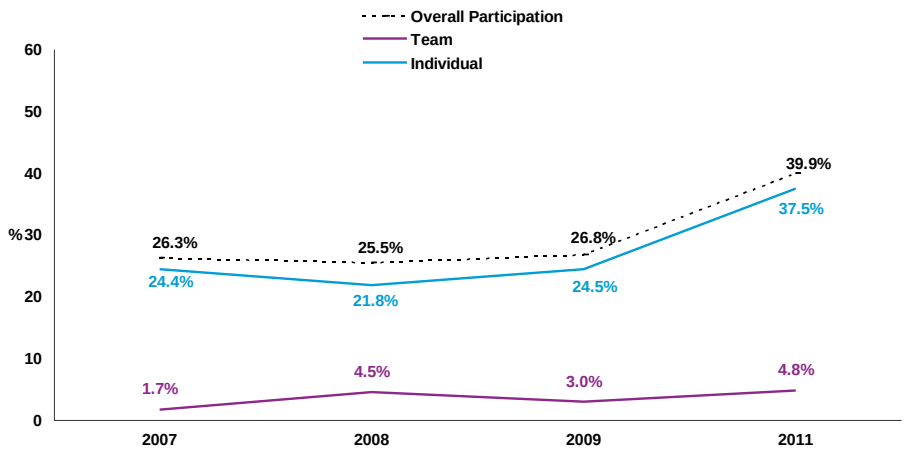


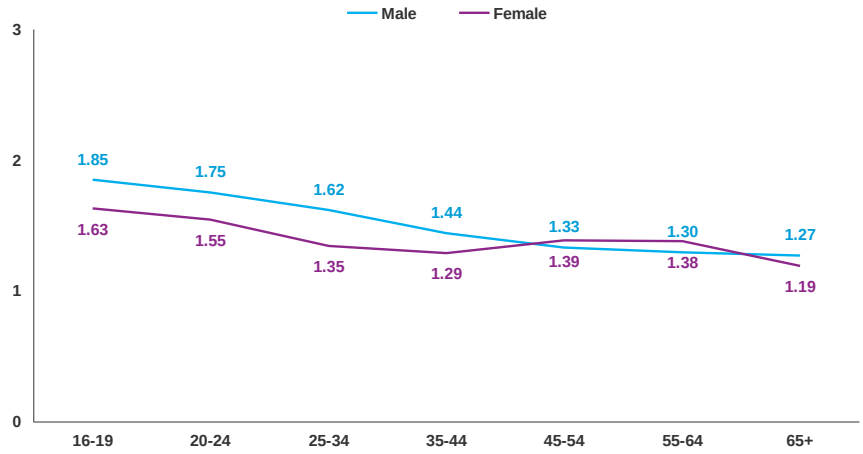
Figure 4.3.2 – Individual and team sports (Females)



As outlined earlier in this chapter, the number of different sports identified in the 2011 study is higher than that on the 2009 study. In the 2011 study participants identified an average of 1.5 sports that they actively play (compared to 1.2 in the 2009 study). However, as outlined in figure 4.4 overleaf, this differs strongly across different gender and age groups, with young males being particularly active and identifying 1.8 sports on average. The pattern in the average number of sports replicates that seen in terms of overall sports participation – i.e. a gradual decline across the age groups for males, compared to females who show a decline followed by a slight rise in activity in the 45 to 54 age group, and then a subsequent decline in those aged 65 or older. This may suggest that middle aged women are more likely to sustain their involvement in sport than men, and may be more open to trying new activities.

This dynamic is important from a policy perspective, both in terms of facilitating women in their physical activity as well as encouraging others to take part in sport. Women in this age group are likely to be key influencers of others in the family (both partners and children), and as such present a channel through which other audiences can be targeted.

Figure 4.4 – Average number of sports played by gender and age



4.3 Participation Differences By Socio-Economic Status

As outlined in the previous section, there is a high degree of correlation between socio-economic status and participation in sports. Exploring the type of activity being participated in reveals further differences in terms of activity.

Examining differences across socio-economic groups (figure 4.5) shows that whilst individual activities dominate activity amongst all groups, there is a substantial difference between the higher and lower social groups in terms of their participation in this type of activity. Given that individual sports arguably present a more flexible way into sports for those taking up sports at an older age, these sports would appear to present the most effective way to eliminate this social gap. However, a key challenge in doing so is presented by previous studies[5] which find that the social gradient in individual sports that emerges in childhood only tends to get bigger into adulthood.

[5] Sporting Lives: An Analysis of a Lifetime of Irish Sport (ESRI, 2008) & Fair Play? Sport and the Social Disadvantage in Ireland (ESRI, 2006)

Figure 4.5 – Individual and team sports by socio-economic grouping

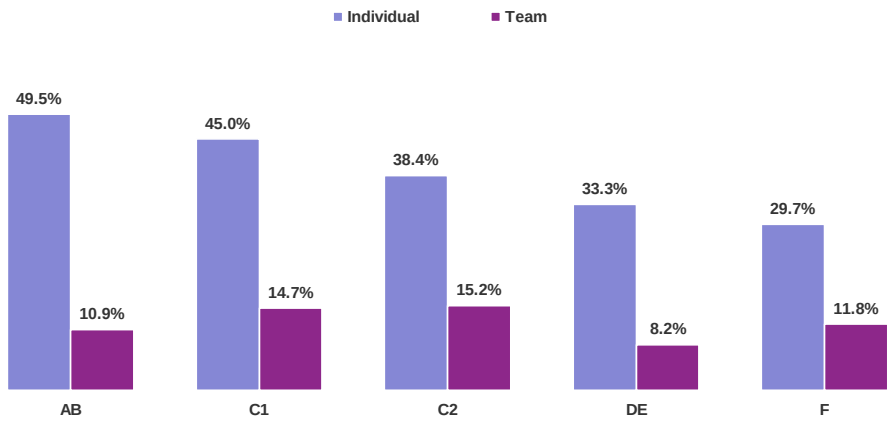
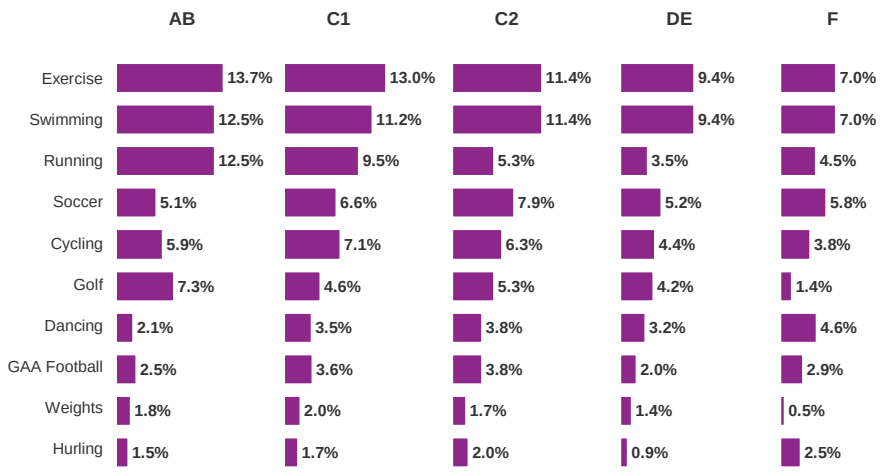


Fig 4.6 shows participation levels for specific sports by socio-economic status. Chi-square analysis identifies those sports where participation is higher or lower amongst a specific socio-economic group relative to their likelihood to play sport (i.e. considering that lower socio-economic groups are less likely to participate in sport).

A number of sports stand out as being more popular amongst higher socio-economic groups. Running is particularly noteworthy in this regard and a strong contrast exists between the higher AB social group and the lower C2 and DE social groups in terms of their likelihood to participate in this activity, with the latter groups being less likely to participate. It is unlikely to be any income effect that is driving this, as running also has lower barriers of entry when compared to many other sports, and indicates the potential to broaden the base of running in Ireland, and in turn increase the levels of physical activity at an overall level.

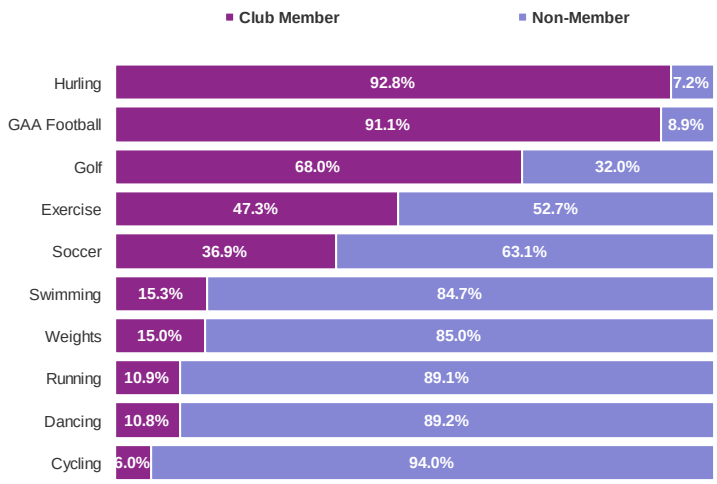
Figure 4.6 – Type of sports played by socio-economic grouping



4.4 Participation Outside of Club Environment

The previous section noted that much of the increase in sport participation may be taking place outside of the club setting and hence is invisible in terms of membership statistics. Evidence of this is provided in figure 4.7 below which shows that for some of those sports showing the strongest increases in participation levels (running, swimming and cycling), only a small minority are members of clubs. In contrast, GAA activities appear to be undertaken exclusively within the club environment.

Figure 4.7 – Sports played within a club environment



4.5 Summary

As the proportion participating in sport is considerably different between the 2009 and 2011 measurements, the proportions playing most types of sport have also increased. Despite this, it is noteworthy that the types of popular sports remain broadly consistent between the two surveys.

However, the pattern of sports participation is certainly changing and is evident through a distinct rise in the popularity of individual sports compared to team sports. Individual sports by their very nature are flexible, and for those new to sport or re-introducing themselves to sport it provides a way to accommodate their own timetable and ability. Arguably, team sports do not provide the same opportunity.

Many of these activities take place outside of formalised sporting structures. The key challenge for sporting organisations will be determining how this can be leveraged to benefit organised sport and enhance the club environment.

Broader Physical Activity

5. Broader Physical Activity

5.1 Introduction

In addition to measuring sporting activity, the ISM includes measurements of wider physical activity, specifically recreational walking and walking and cycling for transport. This section provides an analysis of these activities.

The 2011 study indicates that 89% of the population undertook some form of physical activity in the past seven days – playing sport, recreational walking or walking or cycling for transport – with 11% undertaking no form of activity in the same period[6]. Whilst the main focus of this study is on sporting participation it is important to also consider this broader activity.

Key results that emerge are:

- Recreational walking remains the most popular form of physical activity measured on the ISM and is undertaken by two-thirds of the population

- Walking for transport is the only key metric on the ISM to have seen a decline in participation, perhaps due to fewer people travelling to work. It is likely this same dynamic has driven the increase in recreational walking as those unemployed replace walking for transport with recreational walking

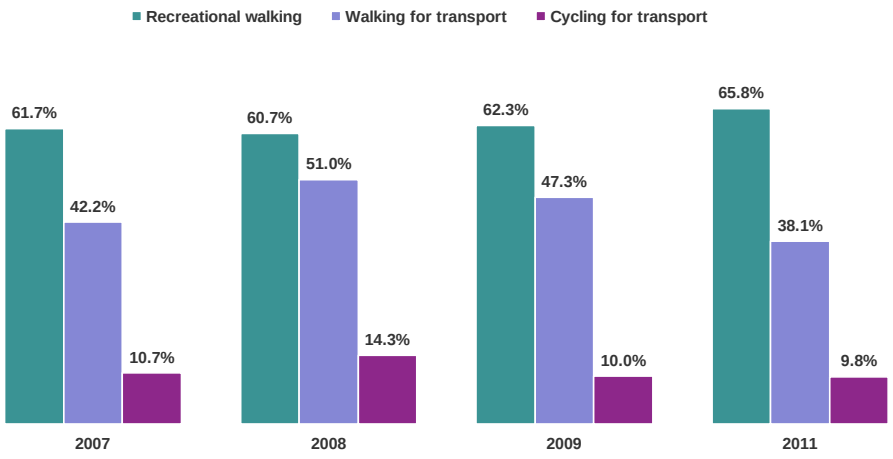
- The proportion cycling for transport remains unchanged at 10%. It may be that the decline in the numbers travelling to work is offset by the success of initiatives such as the Cycle to Work and Dublin Bikes schemes

[6] This differs from the 13% identified later in the report as "sedentary" as the definitions used for the hierarchy of activity require a specific volume of activity in order to be categorised

5.2 Overview

Figure 5.1 below shows that recreational walking is by far the most popular activity, undertaken by 66% within the previous week. Thirty-eight percent indicate that they regularly walk for transport, with 10% regularly cycling for transport.

Figure 5.1 – Broader physical activity

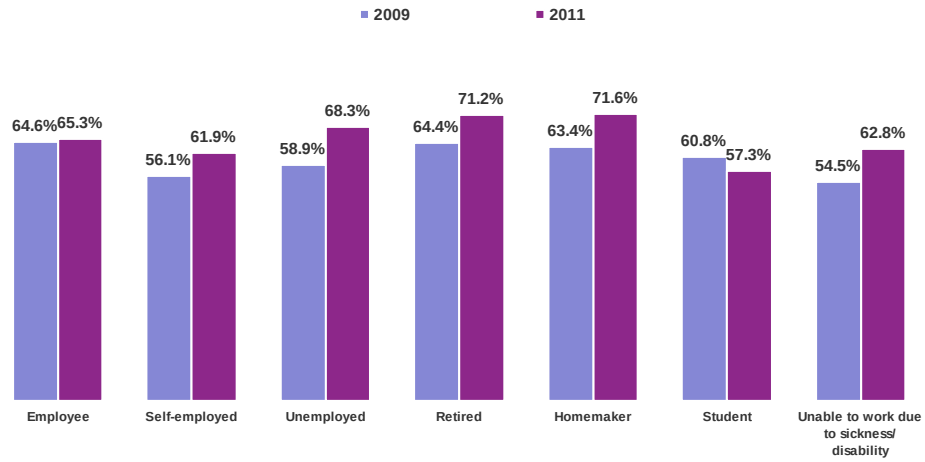


5.3 Recreational Walking

Previous reports have presented an analysis of recreational walking that is consistent with the 2011 findings – men are more likely to walk than women, walking is more likely in the summer months.

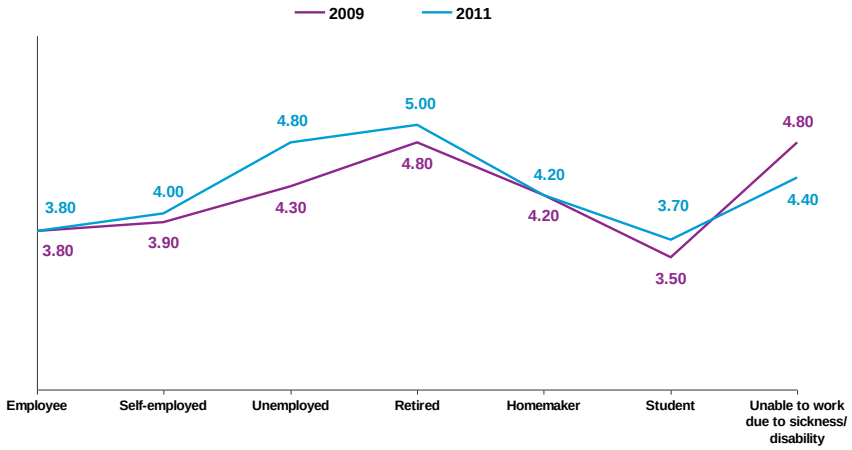
However, an analysis by employment status identifies a shift in the pattern when compared to 2009 data. Figure 5.2 below indicates that the degree of change in recreational walking is not consistent across different employment categories. Those working as employees are no more likely to undertake recreational walks than previously, whilst those who are unemployed are much more likely to undertake recreational walks. This change brings the prevalence of recreational walking for the unemployed more in line with their employed counterparts.

Figure 5.2 – Recreational walking by employment status



With the 2011 results showing a higher proportion undertaking recreational walks, it is also important to examine behaviour within the group. A follow-up question is asked of the number of walks taken in the previous seven days, and the results of this for 2009 and 2011 across the different employment categories are shown overleaf (figure 5.3). This shows that the average number of walks is broadly unchanged both at an overall level, as well as across most employment categories. However, the unemployed group is an exception to this undertaking an average of 4.8 walks per week, compared to 4.3 in 2009.

Figure 5.3 – Number of walks by employment status



Unlike overall sporting participation, the change in recreational walking behaviour for the unemployed is distinctly different from the rest of the population. With the proportion of unemployed who are walking now more aligned with the working population, this indicates that those who have recently left employment may be taking their recreational walking behaviour with them into unemployment. Furthermore, they appear also to be using the additional free time available to them to undertake more walks.

5.4 Walking For Transport

Walking (and cycling) for transport is likely to have seen a significant impact as a result of the economic downturn. Increasing levels of unemployment and reduced hours mean that fewer people are travelling to work, or may be travelling on a less frequent basis, which is likely to have a negative impact on proportion of people using this form of transport. However, in the same respect the economic downturn could also lead to more people seeking cost effective forms of transport such walking (or cycling).

Of the key participation metrics on the survey, this is the only one to see a negative change in participation so it is worth exploring further. The previous report found that walking for transport is largely determined by age and gender and analysis of the 2011 data is no different in this regard.

However, finding a satisfactory explanation for the reduced levels of walking for transport seen on the 2011 survey is difficult. Older age groups and those in employment are where the largest differences are evident, with the level of walking for transport remaining unchanged amongst students. As only limited information on walking for transport is collected through the survey it is difficult to fully understand what may be driving this change, and it is likely to be a combination of various factors.

Analysis of the longer term trends (figure 5.1) shows that the decline in walking for transport is matched by a rise in recreational walking. It seems plausible to suggest that much of this may be caused by wider economic changes, with many no longer having to travel to work and having more time for recreational walking.

Furthermore, another factor influencing the decline in walking for transport may be due to many switching their travel behaviour towards cars due to less traffic congestion on the roads. In this context it is worth noting that walking for transport amongst those with a car in their household has fallen considerably from 46% to 37%, whilst in households with no car it remains broadly static (60% in 2009 compared to 59% in 2011).

Analysis of particular socio-demographic groups identifies that the change in working status is likely to be a key influencing factor. The decline in walking for transport is stronger within the employed group than amongst those who are unemployed. It may be that many of those who had previously walked to work have now transferred to the unemployed group, and they have maintained this walking behaviour. Similarly this would explain the strong uplift in recreational walking amongst the unemployed.

5.5 Cycling For Transport

A number of key developments have taken place in Ireland over the past number of years to encourage individuals to cycle for transport. Specific examples of these include the Cycle-to-Work scheme[7] and the Dublin Bikes initiative which saw hundreds of bicycles made available for short term rental throughout Dublin. As both initiatives were reported to be very successful in terms of public uptake, this research provides an opportunity to understand how they may have shaped the nature of cycling as a form of transport. It is possible that the success of these initiatives was sufficient to outweigh the negative effects caused by fewer individuals travelling to work which has a direct impact on the proportion cycling for transport. This is supported by preliminary results from the 2011 Census which indicates that cycling is the only form of commuting seeing an increase in numbers since the 2006 census.

[7] The Cycle-to-Work allows for an employer to incur the expense of providing an employee with a bicycle and bicycle safety equipment up to a limit of €1,000, without the employee being liable for benefit-in-kind taxation.

With a wide variety of socio-demographic factors having an impact on the likelihood to cycle for transport, by using various analysis techniques it is possible to identify the relative impact of each of these. This technique identifies the combination of features that best explains the data.

As with transport patterns generally, notable differences exist across regions. In this regard it is interesting to examine differences between behaviour in Dublin and outside Dublin. Figure 5.4 below illustrates the proportions cycling for transport in Dublin compared to other areas. Comparing 2011 to 2009 (when the Dublin Bikes Scheme was introduced) indicates that whilst cycling for transport outside Dublin has declined in popularity, cycling within Dublin is slightly more popular than previously (although in the latter case this is not statistically significant).

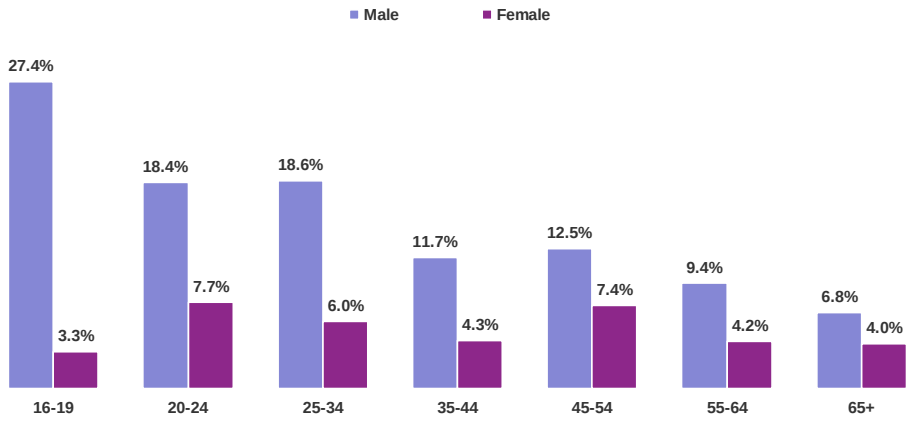
Figure 5.4 – Cycling for transport by region

However, what is most revealing is the distinct difference between the genders in terms of cycling (figure 5.5), with males much more likely to cycle for transport than females. Across age groups it is most popular amongst the 16 to 19 year old males (most likely due to cost reasons and lack of access to a car), while it declines across older age groups. However it is particularly interesting that between the ages of 20 and 54 the decline is quite gradual for males and non-existent in terms of females, indicating that if an individual continues to cycle for transport into their 20s they may be quite likely to maintain it as a realistic transport option as they grow older.

The difference between men and women is striking and further research should be conducted to further understand why so many women reject cycling as a transport option. As these differences are strongest at the youngest age groups (and cycling as a form of transport is sustained reasonably well between the ages of 20 and 54), any policy initiatives should be directed at younger women in particular.

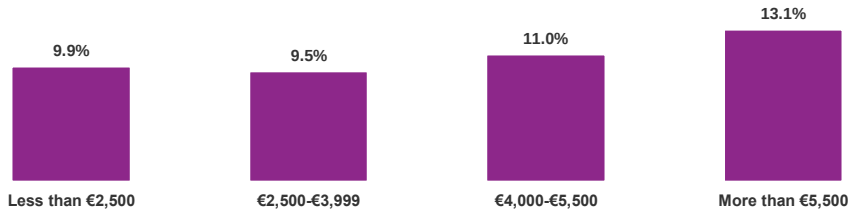
This is a trend also identified in previous reports, and is a dynamic that the Cycle-to-Work and related schemes may have sought to encourage more recently. Further waves of the Irish Sports Monitor will indicate the success of these initiatives in this regard.

Figure 5.5 – Cycling for transport by age and gender



A further noteworthy difference exists in terms of household income, with those in higher income households more likely to cycle than those with a lower income (figure 5.6). This is interesting in the context of these households being more likely to own a car and more likely to be in older lifestages (where cycling for transport is less common). However further analysis of the data does not provide a satisfactory explanation as to why this relationship is such.

Figure 5.6 – Cycling for transport by household income



5.6 Summary

It is clear that the impact of the recession has fundamentally altered physical activity within the population; however the nature of this impact differs strongly across individual activities. In terms of walking there has been a shift from walking for transport towards recreational walking, and this section discusses this change in some detail. It is clear that the unemployed are participating more frequently in recreational walking than before, and that they are filling additional leisure time with this activity is encouraging both from the perspectives of physical and mental well-being.

That the proportion cycling for transport remains unchanged compared to the 2009 study (despite a decrease in the numbers travelling to work), provides evidence of the success of the various cycling initiatives in recent years. However, the gender divide that exists in terms of cycling needs further exploration, and policy initiatives will need to be identified that encourage young females to adopt it as a viable form of transport.

Hierarchy of Activity

6. Hierarchy Of Activity

As in previous waves of the Irish Sports Monitor, the population is split into four categories determined by their level of activity across sports, recreational walking and walking or cycling for transport. This hierarchy of activity is designed to complement the National Physical Activity Guidelines in that those classified as Highly Active have achieved the required level of activity to meet these guidelines. The classification is outlined in more detail below.

Highly active	Participated in 30 minutes moderate[8] physical activity at least five times during the previous seven days (i.e. meet National Physical Activity guidelines)
Fairly active	Participated in 30 minutes physical activity at least twice during the previous seven days
Just active	Participated in a sporting activity or recreational walking for 20 minutes at least once during the previous seven days, or regularly walks or cycles for transport (at least once a week)
Sedentary	Did not participate (20 minutes) in recreational activity during the previous seven days and does no cycle or walk regularly for transport

This section of the report presents an analysis of this hierarchy from the perspective of the types of activities that determine membership of specific categories. The following section has a particular focus on exploring sedentarism which includes analysis on differences in activity across various socio-demographic factors.

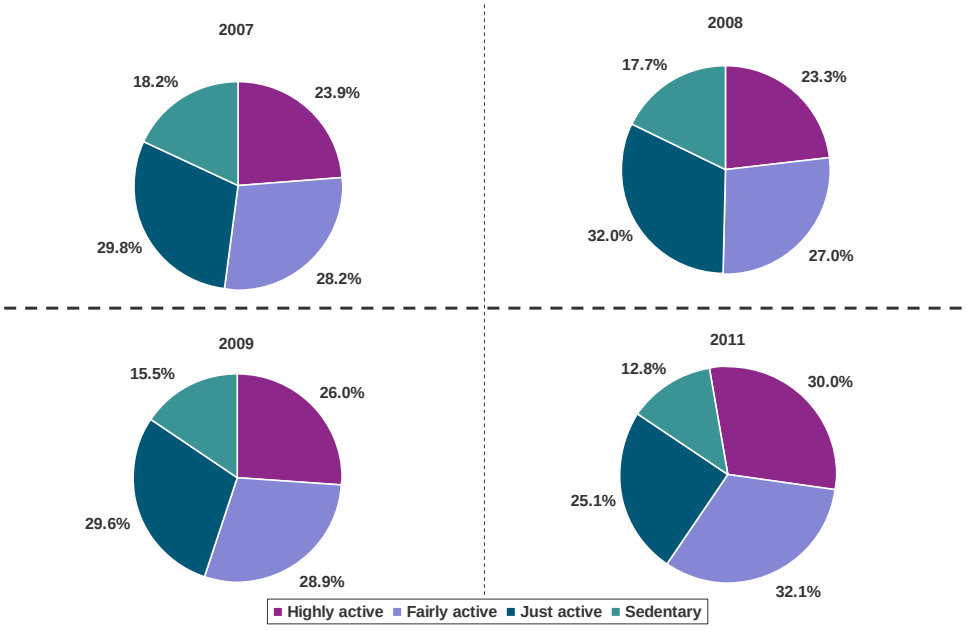
Key results that emerge are:

- The proportion that is highly active has increased from 26% to 30% between 2009 and 2011, with the proportion that is sedentary declining from 16% to 13%
- A combination of activity categories is generally required in order to meet the recommended levels, with sport and recreational walking being the two activities that are most likely to deliver these levels of activity
- Over half of sports participants do not meet the national or international guidelines for physical activity, with soccer, golf and dancing prominent in terms of not delivering sufficient levels of activity to meet these guidelines
- Sixty-one percent would like to increase their current levels of activity, with swimming, walking and cycling being the most popular activities for increased participation
- A lack of free time remains the key barrier to increased participation levels among all activity groups

[8] "Moderate" activity is defined as walking that is at least at a steady pace or other physical activity that is sufficient to raise the breathing rate

Figure 6.1 provides a breakdown of the population across these categories. This illustrates that 30% of the population are meeting the National Physical Activity Guidelines (i.e. classified as highly active), with 13% being classified as sedentary.

Figure 6.1 – Hierarchy of activity

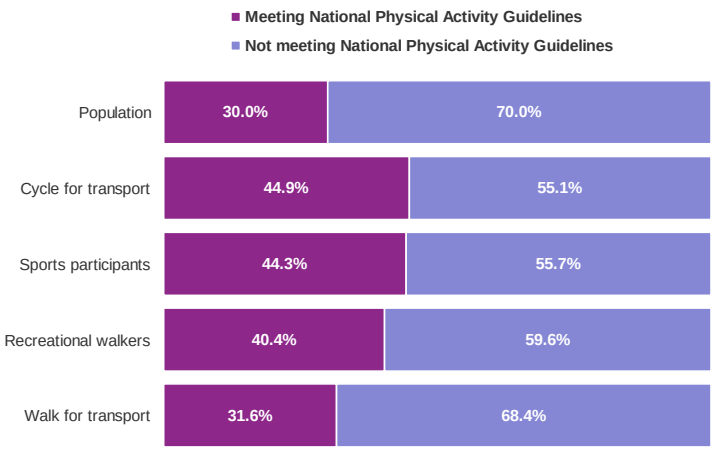


6.1 Differences In The Nature Of Activity Between Highly/Fairly/Just Active And Sedentary

The activity classification is built from a combination of activities including sports, walking and active community (i.e. walking or cycling for transport), with each contributing in different ways depending on the intensity of the activity. As such, an analysis of differences in activity patterns between the highly active and less active groups is useful in informing strategies to encourage the population to become more active.

However, before conducting this analysis, it is worth examining the relative impact of each type of activity on overall activity levels. What is particularly striking through this analysis are the proportions who are participating in some form of physical activity, but are not sufficiently active to meet the minimum level required in terms of the National Physical Activity Guidelines. Amongst the population as a whole, 70% are not sufficiently active to meet these minimum requirements, however as indicated in figure 6.2 overleaf, even amongst those participating in a sport almost 6 in 10 are not meeting the requirements. This increases to 6 in 10 when looking at those undertaking recreational walking.

Figure 6.2 – Meeting National Physical Activity Guidelines



In the context of the objective to increase active participation levels within the population as a whole, this is a key finding. The proportions participating in physical activity are encouraging and this is undoubtedly delivering health benefits, however in many cases it is not sufficient to deliver significant health benefits. Whilst the survey does not include a measurement on perceptions of the level activity being undertaken, one could surmise that many may incorrectly believe that they are undertaking a sufficient level of activity, whilst they may actually be falling short of the recommended guidelines. Further education may be required to deepen the level of understanding regarding the level of activity that is required to meet the guidelines for physical activity.

Further analysis below of the specific activities participated in by highly, fairly and just active groups indicate strong differences in activities being undertaken between these groups.

An initial interesting comparison is to explore the categories of active participation that they have undertaken in the previous seven days – i.e. whether they have played sport, undertaken recreational walking, walked/cycled for transport or undertaken a combination of these activities. Figure 6.3 below indicates the blend of activities undertaken by those in each of the activity classification groups, and whilst the type of activity determines membership of each group, the differences that emerge across the groups in terms of the breadth of activity are striking.

Figure 6.3 – Types of activities amongst activity groups

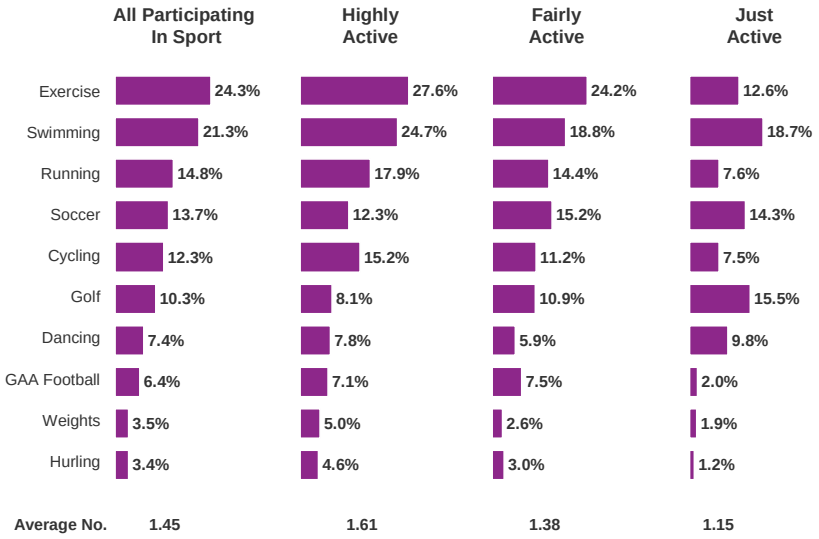
	Highly Active	Fairly Active	Just Active
	%	%	%
Participate in only one activity category	**23.2**	**38.7**	**61.0**
Sport	4.5	12.7	7.9
Recreational walking	18.7	26.0	24.9
Walking for transport	-	-	26.8
Cycling for transport	-	-	1.4
Participate in multiple activity categories	**76.8**	**61.3**	**39.0**
Sport & recreational walking (only)	29.6	19.0	6.9
Other combination	47.2	42.3	32.1

Figure 6.3 shows that for at least a quarter of the fairly active and just active groups, recreational walking was the only activity that was undertaken. Furthermore, 39% of those who are Just Active and 61% of those who are Fairly Active were involved in only one activity category. In contrast, 76% of those who are Highly Active are involved across at least two of the categories, most commonly a sporting activity and recreational walking.

This demonstrates two key dynamics in meeting the recommend levels of activity. Firstly, that a combination of multiple activity categories is generally required in order to meet the recommended levels. Secondly, sport and recreational walking are the two activities that are most likely to deliver these levels of activity.

An analysis by the type of sporting activity provides further understanding of key differences that exist across the three groups. Examining the ten most popular participation sports in figure 6.4 overleaf shows that those who are more highly active are more likely to participate in most of those sports than those in the fairly- or just active categories. This is to be expected as this group has a higher level of sporting involvement overall (participating in 1.61 sports on average compared to 1.15 for those who are Just Active). However there are three types of sport (soccer, golf and dancing) to which this does not apply.

Figure 6.4 – Types of sports played amongst activity groups



Soccer and dancing both have levels of participation amongst the fairly and just active groups that is either higher than or on a par with the highly active group. This is primarily due to them being played on a less frequent basis (on average 1.7 and 1.6 days in the past week compared to 2.3 days for sport overall). Golf is slightly different in this regard, with the key difference being that it is not of sufficient intensity to be categorised as a "moderate physical activity" (54% claimed that the effort was not sufficient to raise their breathing rate, and 85% claimed that the effort was not enough for them to be out of breath or sweat).

Of these three activities, the first two provide significant opportunities to encourage those who are already active to increase this activity to a level sufficient to meet national and international guidelines. Whilst 6% of the population play soccer, the majority of these individuals (61%) do not meet the National Physical Activity Guidelines. Similarly, 4% of the population participate in dancing, yet 53% of this group fail to meet the minimum level of activity required to meet the National Physical Activity Guidelines. There are clearly significant opportunities amongst those who already have an involvement in these activities to increase the level of their involvement, either in terms of the frequency of their involvement and/or the lengths of the sessions in which they are involved.

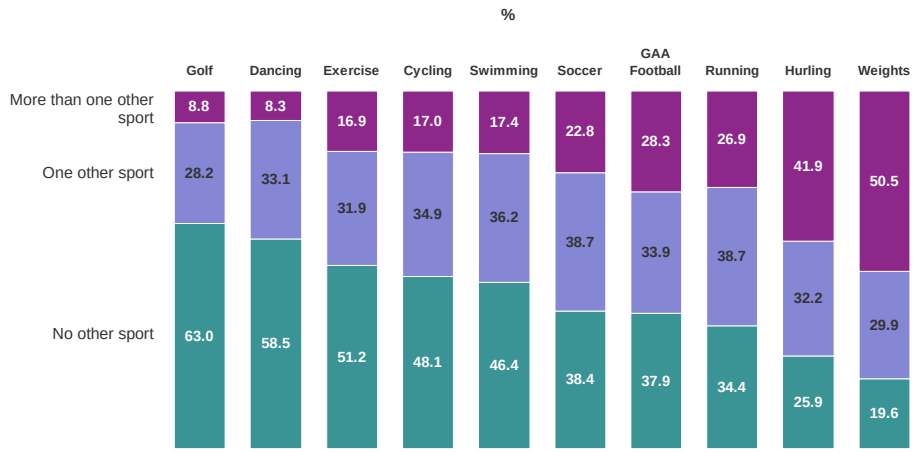
The third activity, golf, arguably does not provide the same type of opportunity. The key challenge with golf is that, due to the nature of the sport, increasing the physical intensity to a level that is sufficient to be considered as moderate activity is unlikely to be feasible.

Whilst the pattern across the different types of participation categories is that more active individuals are more likely to participate in each category, there is one notable exception to this. Of those who are highly active, 40% claim to walk regularly for transport, significantly less than the 56% of the just active group who do so. What this may indicate is that that walking for transport could be primarily needs-based rather than an active choice to increase levels of activity (for example, those participating in lower levels of activity are less likely to have a car in the household). In this regard it is particularly interesting that those who are highly or fairly active are not using walking for transport as a method by which they can further increase their activity levels.

6.2 Participation In Multiple Sports

As outlined earlier 17% identified more than one sport that they participate in, with participants involved in an average of 1.5 sports. An insightful analysis to explore this dynamic is to identify differences between sports in terms of whether they are more likely to be played in isolation or in combination with other sports. Figure 6.5 below identifies the proportion of those participating in each of the ten most popular sports in the context of their involvement or not in other sports.

Figure 6.5 – Participation in multiple sports



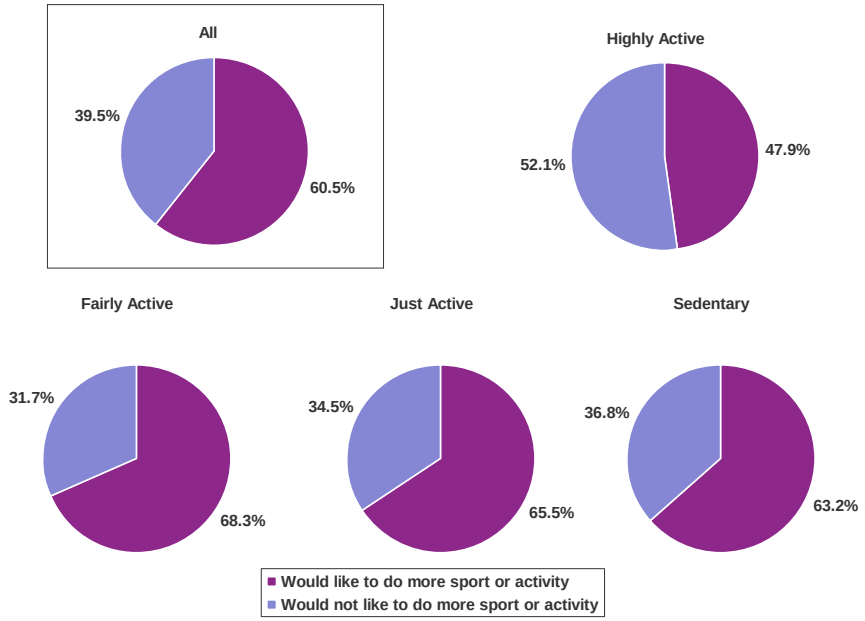
Almost two-thirds of golfers identify this as being their only sport, which is an important finding as it is an activity unlikely to deliver the same fitness benefits as other sports.

In contrast at the other end of the scale, 80% of those involved in weights are involved in at least one other sport (with 51% involved in at least two other sports) – this perhaps suggest that weights are being used as a form of supplementary training to support other activities that are perhaps of more importance to the participant.

6.3 Desire To Increase Levels Of Activity

Figure 6.6 indicates the desire for an individual to participate in more sport or activity than they currently do. This question was added to the 2011 survey and was asked regardless of the current level of activity and provides an insight into individuals' motivation levels to increase these levels as well as the perceived barriers to increased activity.

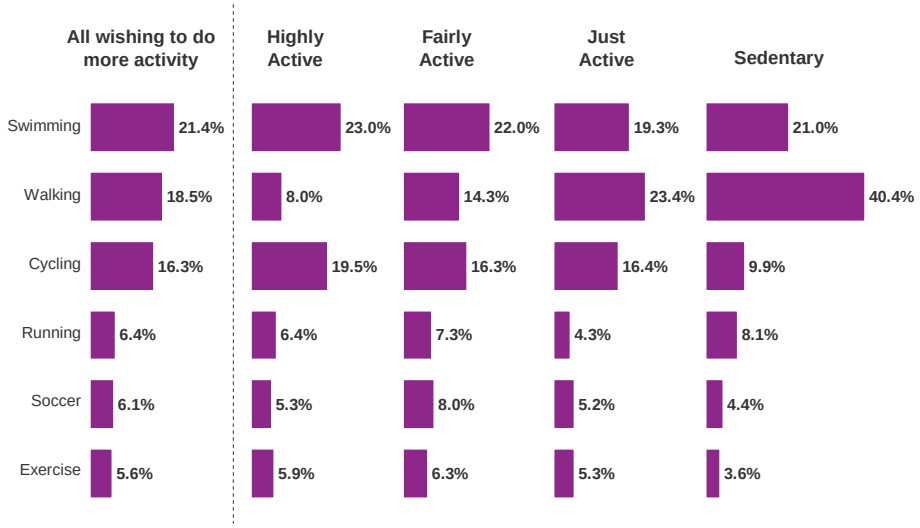
Figure 6.6 – Desire to increase levels of activity



What stands out from this analysis is that it is those who are less active that show the strongest desire to increase their levels of activity – this is particularly encouraging in the context of increasing activity levels within the population as a whole. Combining the three less active groups indicates that two-thirds of those not currently meeting the WHO requirements for physical activity would like to increase their level of activity. Even within the highly active group, almost half would like to do more activity than they currently do, and are perhaps limited by time, financial or other constraints.

To provide further context on the differences between these groups, respondents were asked which activity they would like to participate in more frequently (figure 6.7). Those who are currently sedentary expressed a strong desire to participate in walking, whereas more active individuals identified swimming and cycling. In this light it would seem appropriate that a focus is placed on walking as a gateway activity to spark activity amongst sedentary individuals.

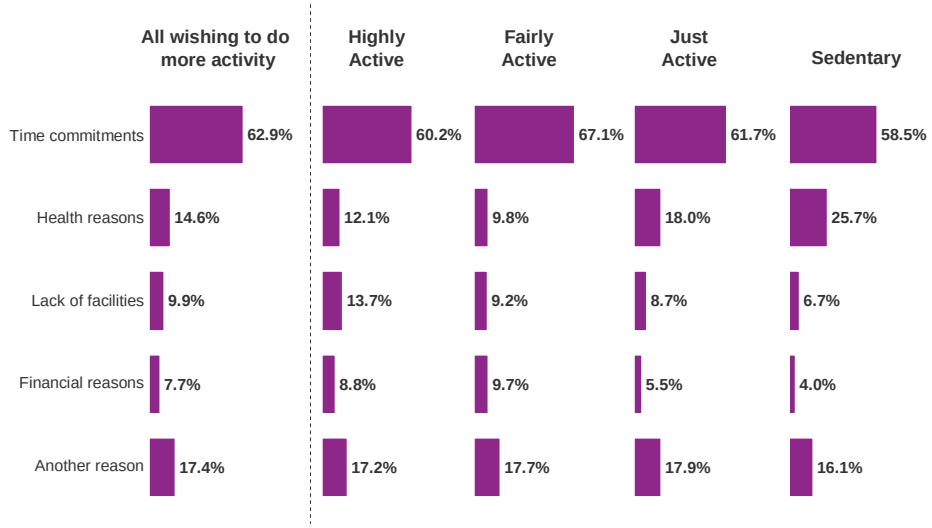
Figure 6.7 – Type of activity in which would like to increase activity levels



The perceived barriers to participation (figure 6.8) provide further insight into those seeking to increase their participation. This question was asked on the survey on an open-ended basis with answers subsequently grouped into relevant categories. Regardless of the current level of activity, a lack of free time is the most commonly cited reason for not participating in more activities. If this figure is extrapolated to the overall population (i.e. including those with no desire to increase their levels of activity) it shows that 38% of the overall population claim that whilst they would like to increase their levels of activity they cannot find the time to do so[9].

[9] Figure 6.8 only includes those who wish to increase their activity levels – i.e. 61% of the overall population

Figure 6.8 – Factors preventing further activity



As reported in previous research (for example that conducted by the Central Statistics Office referenced earlier) a lack of free time is the main reason preventing further activity. Whilst this is constant across all activity groups, some of the differences are particularly revealing. Those in the highly active group are less likely than other groups to cite a lack of free time and more likely to cite a lack of facilities as a reason preventing further activity. What this indicates is that for those more heavily involved in sporting activity they are more likely to be open to further activity once the facilities and resources are available to them. This can be explained further by looking at the types of activities they would like to do more of - swimming and cycling – which by their nature require specific facilities. This is consistent with the previous research conducted by the Central Statistics Office which found that a fifth of active individuals indicated that having access to a swimming pool would encourage them to further increase their levels of activity.

At the other end of the scale, whilst a lack of available time is also a barrier for those who are sedentary, health reasons also arise as a notable challenge for this group. This is particularly revealing, in the context of walking being the activity in which they would most like to increase their activity, and for most of this group it would be expected that the health reasons are not so severe as to prohibit a low intensity form of activity such as walking.

Overall, it is encouraging that a lack of available facilities only arises as a minority reason prohibiting further activity, and may suggest that those who wish to get more involved in a particular activity will seek out any required facilities once other barriers (in particular time-based ones) can be overcome. For example, those most likely to cite a lack of available facilities as the reason are those wishing to take part in more swimming, however even for this group it remained a relatively minor factor.

This indicates that the desire to participate in more sport is limited more by personal barriers than resource ones. Encouraging an uplift in activity amongst those who show some desire to do so will need to focus on how individuals can accommodate physical activity alongside other life priorities. For example, the way in which it can be a family-based activity or can be accommodated within the journey to work.

6.4 Summary

In the context of rising levels of sporting activity and recreational walking, it follows naturally that the proportion who achieve the National Physical Activity Guidelines has also increased. Also that there is a strong desire to undertake further activity is encouraging, particularly when it is considered that this view comes so strongly from those who are less active.

That a significant proportion of the active population are not currently achieving the minimum recommended levels of activity is a cause for concern. An understanding of the perceptions of this group towards their activity levels would be particularly revealing, in particular those participating in sports such as soccer where this issue is particularly prevalent. This will need to be considered in future waves of the ISM.

What is clear from this analysis is that participating in only one type of activity is unlikely to deliver a sufficient level of physical activity to achieve these guidelines. If delivering an increase in the proportions who achieve this recommended level of activity is a priority, then a focus may be required on encouraging those who are already active to adopt additional types of activity.

Sedentarism

7. Sedentarism

This section of the report explores sedentarism from the perspective of identifying the groups within the population that require specific action to increase their levels of activity. Overall the level of sedentarism has declined considerably from 16% in 2009 to 13% in 2011. However, as would be expected there are key groups in the population for which sedentarism is at a level that may require targeted policy initiatives.

Key results that emerge are:

- There is a notable rise in sedentarism for males in the 45-54 age group, but this does not occur amongst females until the 65+ age group

- Those with a monthly household income of less than €2,500 are significantly more likely to be sedentary than those on a monthly income of €5,500 or higher

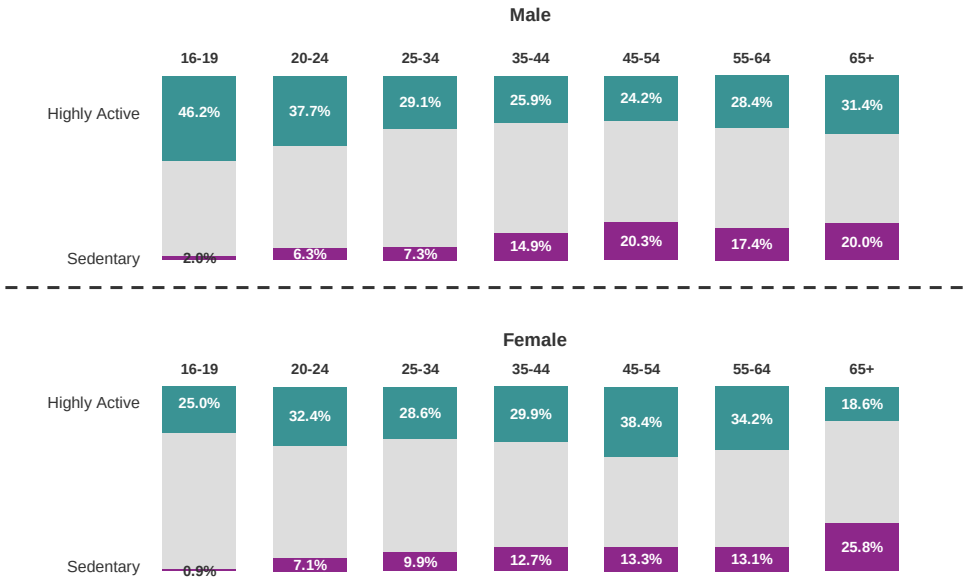
- Sedentary behaviour is more likely in rural areas

An analysis of the hierarchy of activity by socio-economic factors provides a unique perspective on key differences that exist within the population. As would be expected, younger individuals are less likely to be sedentary than those older than this – with 4% of those aged under 24 classified as sedentary, compared to a peak of 24% of those aged between 45 and 54. Interestingly, the level of sedentarism falls amongst the population older than this, with 17% of those aged 55 and over being classified as sedentary.

However analysis of the level of sedentarism at an overall level hides different dynamics that exist within each gender. As illustrated in figure 7.1 overleaf, the proportion of males who are highly active (i.e. meet the National Physical Activity Guidelines) falls sharply across the age groups up to the 45-54 age group, with a corresponding rise in the number of sedentary males in this age group. However despite an increase in the proportion who are highly active amongst older age groups the level of sedentarism remains static. A possible explanation for this could be that many of those who become sedentary develop a “sedentary habit” and that the increase in numbers of highly active in later years comes from those who are already active at ages 45 - 54.

Females, on the other hand, demonstrate a very different dynamic with sedentarism rising slowly across up to the 35-44 age group, stabilising across the older age groups before rising sharply again in the oldest age group.

Figure 7.1 – Sedentarism by gender and age



An explanation of these dynamics exists within an examination of differences across life stage. Males are likely to exhibit the highest activity levels in the youngest age group, however this declines across older age groups coinciding firstly with the termination of full-time education, followed by increased time pressures due to work and family commitments. These commitments are relaxed somewhat as they grow older, thus facilitating increased activity in older age groups. However whilst this change in life stage may be sufficient to encourage older males who are already active to increase their levels of activity it is not sufficient to encourage those who are sedentary to become active.

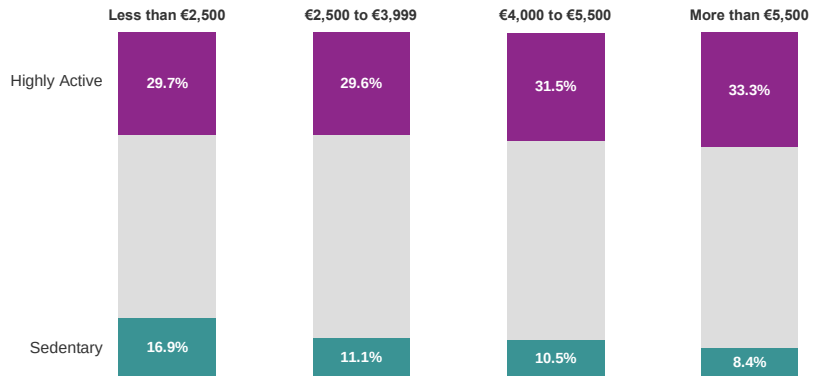
The increased activity amongst females aged 45-54 is likely to be explained by the ageing of their children leading to a reduction in the time spent on childcare activities. However, the increase in sedentarism amongst those aged over 65 is more likely to be due to health reasons (as outlined in the previous section).

Demographic factors on their own do not explain the differences that exist across the population in terms of the level of activity. Other factors that play a significant role include where the individual is living, with those living in isolated locations being significantly more likely to be sedentary than those living in urban locations. This makes intuitive sense, as the environment in isolated locations (e.g. having to travel further to access community facilities, roads less suited for walking etc.). In this regard it is worth noting that levels of sedentary behaviour are highest in Connacht (where 38% describe where they live as being isolated) and lowest in Dublin (where 2% describe where they live as being isolated).

This raises an additional question as to extent to which having access to a car has an impact on activity levels. Earlier reports highlighted a positive relationship between sports participation and car ownership (i.e. those with access to a car were more likely to play sport). However, the 2009 report identified a reduction in the impact of car ownership on likelihood to participate in sport. In terms of the extent of their activity, the 2011 results show that those without a car are significantly more likely to be sedentary or just active, and those with a car are more likely to be fairly/highly active.

Wider socio-economic factors are also key indicators of an individual's likelihood to participate in physical activity. Previous reports on the ISM study have noted the strong correlation between income and level of activity, and this relationship is clearly evident again in the 2011 data, with income being a stronger indicator of an individual being sedentary rather than of high levels of activity. As indicated in figure 7.2 below, those with a monthly household income of less than €2,500 are significantly more likely to be sedentary than those on a monthly income of €5,500 or higher (17% in the case of the former, compared to 8% in the case of the latter). However, it is noteworthy that the levels of high activity are broadly consistent across the income groups.

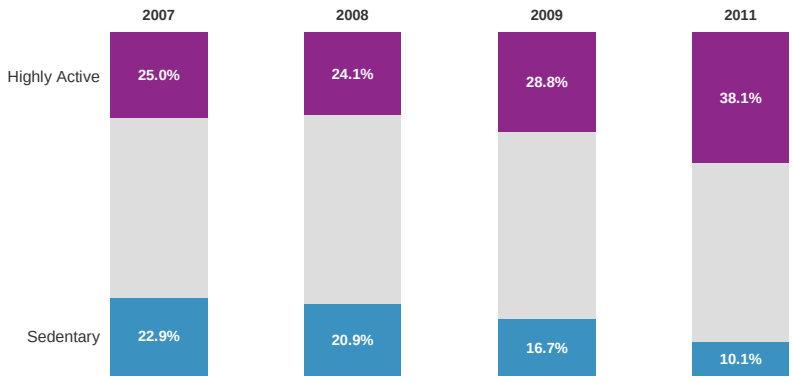
Figure 7.2 – Sedentarism by income



Not only is this true of actual income values, but also in terms of perceived financial comfort. The 2011 survey included a question on the respondent's current financial situation and the ease by which they can meet financial commitments. Those who claim not to have enough to make ends meet, and those who can just about make ends meet are also noticeably more likely to be sedentary, however this is strongly correlated with the above. As net incomes and the level of discretionary spend is likely to decline over the coming years, the strength of the correlation between lower incomes and sedentary behaviour cannot be ignored, and actions taken to increase levels of activity will need to place a significant emphasis on lower cost or free activities.

Along with falling incomes, another key factor that needs to be considered is the heightened and increasing levels of unemployment. Previous reports noted a trend where the level of activity amongst the unemployed rose significantly to where they became more likely to participate in sport than those in employment, however this reverted to pre-recession levels in 2009. The 2011 results indicate that the group most likely to be highly active are those currently unemployed, with 38% of this group meeting the National Physical Activity Guidelines. This finding supports a lack of free time being cited as the main factor preventing higher participation levels (as discussed in the previous section). However, whilst this group are most likely to be highly active, the level of sedentary behaviour is broadly in line with the rest of the population. High levels of unemployment among younger age groups explains this difference, with younger individuals who are unemployed being more likely to fill free time with sporting activity.

Figure 7.3 – Sedentarism amongst unemployed individuals



Summary

It is encouraging that the proportion that are sedentary is declining at an overall level, and the decline from 16% to 13% is considerable in this regard. However, a key challenge exists in that certain groups are more prone to a sedentary lifestyle – middle-aged and older males and older females, as well as lower income groups and those living in isolated areas are noteworthy in terms of their levels of sedentarism.

The previous section outlines recreational walking as being the key gateway activity to encourage those who are inactive to become active. Policy initiatives will need to focus on this form of activity to encourage those who are inactive to undertake walking and ensure that the population who are currently inactive are made aware of safe and attractive walking environments.

Voluntary Activity

8. Voluntary Activity

Whilst driving levels of active participation in sport is the main focus of the Irish Sports Council, maximising social participation is central to achieving this objective through strengthening the sporting structures.

For the purposes of this study, social participation is defined as voluntary activity associated with sports and exercise, club membership, and attendance at sporting events as a spectator or supporter.

Each of these aspects are dealt with individually over the following sections.

Key results that emerge in terms of volunteering are:

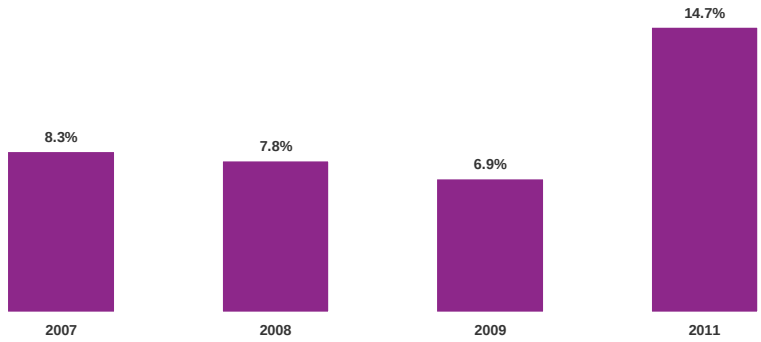
- The proportion volunteering for sport has increased from 7% to 15%
- Provision of transport and coaching are the two roles where voluntary activity has increased the most

The definition of volunteering for this study is broad, including the more club orientated contributions through organising and coaching, through to providing transport for players and participants.

The previous report noted a statistically significant fall in volunteering, however this trend was counter-intuitive to what might be expected with the decline in the economic situation where people may have more free time. A number of hypotheses were presented to explain this trend, although none were felt to satisfactorily explain the change.

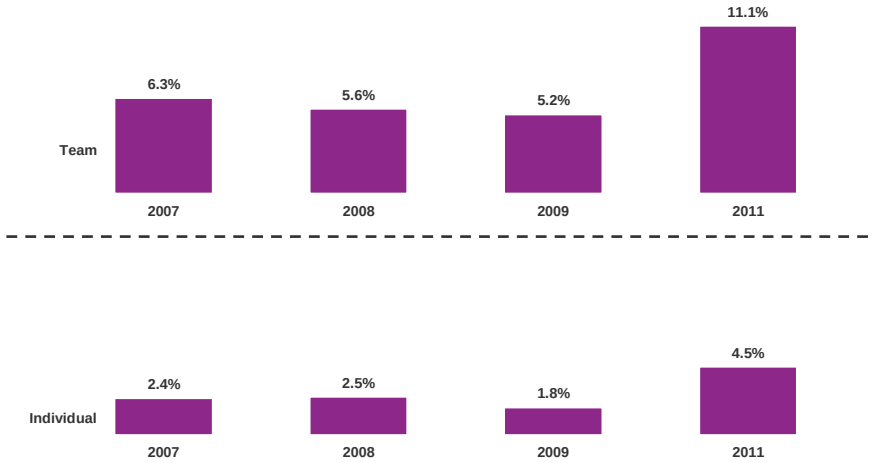
As seen in figure 8.1, the 2011 survey identifies 15% of adults having participated in voluntary activity within the previous seven days, which is substantially different to what has been identified previously. Whilst many of the other metrics on the survey have undergone significant change when compared to previous years of the ISM, the nature of the change within volunteering is undoubtedly much stronger than seen across other measurements.

Figure 8.1 – Volunteering for sport



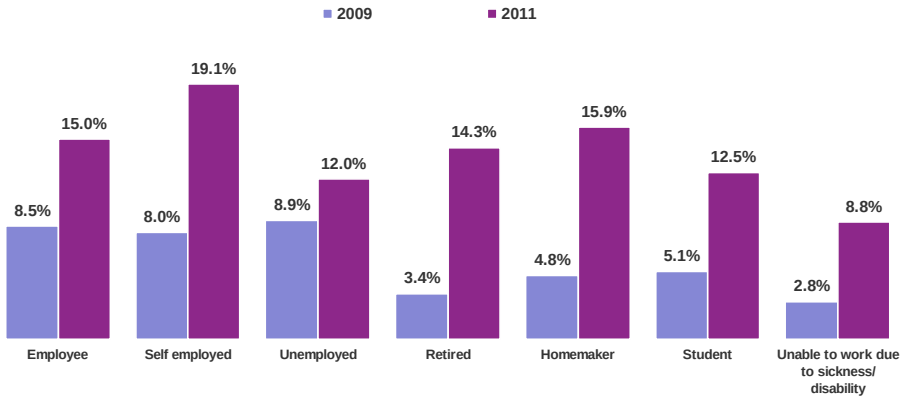
The first step in identifying what may have driven this change is to explore the types of activities that individuals have been involved in. Figure 8.2 below demonstrates that the levels of volunteering for both individual and team activities are substantially higher than seen previously, with 11% volunteering in team activities and 4% in individual activities. Examining the pattern by individual sport is less straightforward as the most common type of volunteering is within GAA clubs, so differentiating by specific type of sport is difficult. However an examination of the most common sports for voluntary activity indicates that the type and ordering of sports is broadly consistent with previous years – consisting of GAA football and hurling, soccer, rugby and swimming.

Figure 8.2 – Type of sport volunteered for



It would be anticipated that the impact of the recession on volunteering, as outlined earlier may provide some form of explanation, so understanding volunteering levels by employment status should prove insightful. Figure 8.3 below provides the proportion volunteering across the different categories of employment status and it indicates that the difference is narrower amongst those who are unemployed than it is within other categories. Indeed, those who are unemployed are less likely to volunteer than those in employment. Instead, the differences are much more likely to occur in groups such as homemakers, retired and those unable to work due to sickness or disability (as is the case with other key participation metrics).

Figure 8.3 – Volunteering by employment status

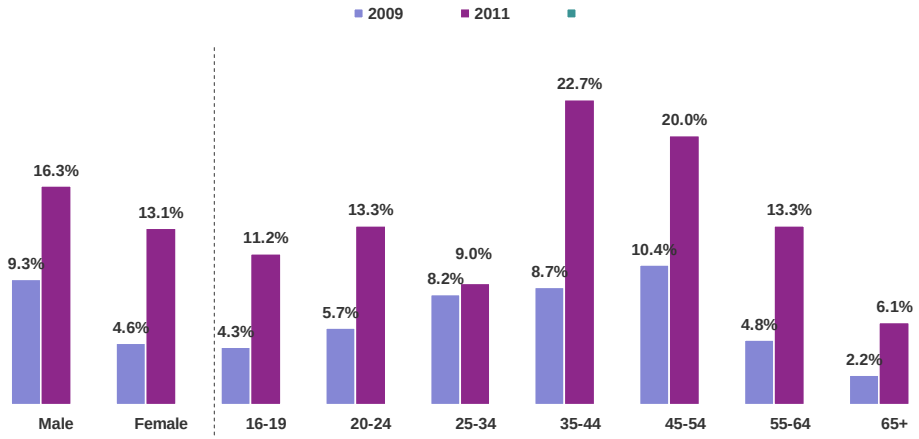


The ISM also collects information on the nature of the volunteering role undertaken by the volunteer. The definition of volunteering that is read out to survey respondents is very broad, and the ISM recognises that volunteers can play a number of different roles within a particular sport (e.g. coaching and fundraising), the survey allows for individuals to categorise themselves into more than one role. However, a comparison of the types of roles shows a distinct change in the 2011 results, with a significantly higher proportion identifying that their role was either to provide transport or coach (figure 8.4). Between each other, these two roles account for the difference in volunteering at an overall level.

Figure 8.4 – Nature of voluntary activity

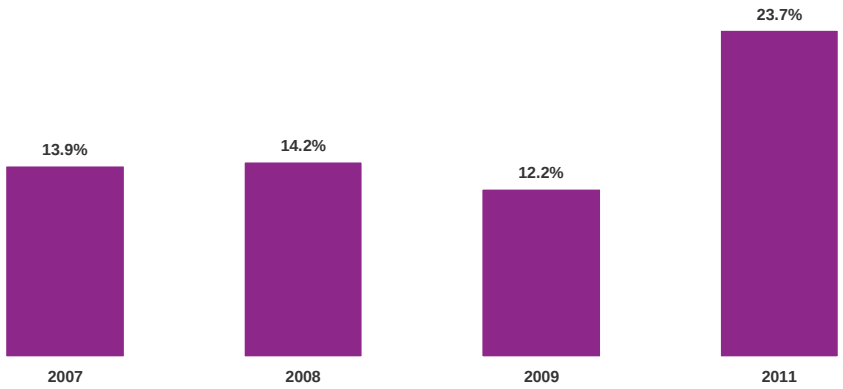
An analysis of demographic groups (figure 8.5) indicates that the same trend as has been witnessed across the other participation metrics in terms of stronger differences amongst females. However there is no distinct pattern across age groups, with increases in volunteering across a mixture of both younger and older age groups.

Figure 8.5 – Volunteering by gender and age



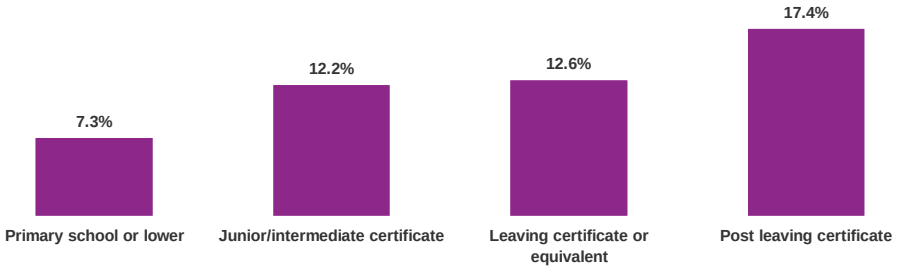
A possible explanation for the differences may lie in the nature of the roles themselves. Of all the volunteering roles included on the survey, it would be expected that providing transport and coaching would be most strongly associated with children's sport. As such, it would be expected that it is amongst parents where the greatest difference would be seen. Figure 8.6 shows the trend from 2007 to 2011 of volunteering amongst those with children aged under 18, and indicates that whilst this group are certainly more likely to volunteer than the population as a whole, the difference between 2009 and 2011 is largely of the same magnitude as witnessed at the overall level. As such, the difference is not driven solely by a significant change in volunteering amongst parents.

Figure 8.6 – Volunteering amongst parents of children aged under 18



A final point worth exploring in this section is the correlation between volunteering and educational level, with higher levels of volunteering amongst those with post-Leaving Certificate education compared to those with less than this (particularly when compared with those with Primary level or lower) – figure 8.7. This is noteworthy in the context of the absence of any correlation in terms of income, and may indicate that volunteering is a function of attitudinal rather than economic differences.

Figure 8.7 – Volunteering by level of education



Summary

A comparison of the results of the 2011 wave of the ISM to that in 2009 would suggest that there has been a substantial rise in volunteering over the past two years. This may be unsurprising in the context of many having increased leisure time, and is reflected in the proportions getting more involved through the provision of transport and coaching roles.

That the unemployed remain less likely to volunteer than other groups presents a unique opportunity to sporting organisations. Many in this group will have specific business, trade and personal skills that can benefit organisations if their involvement is encouraged. Sporting organisations will need to identify this within their membership base and present it to relevant individuals as a mutually beneficial arrangement.

Club Membership

9. Club Membership

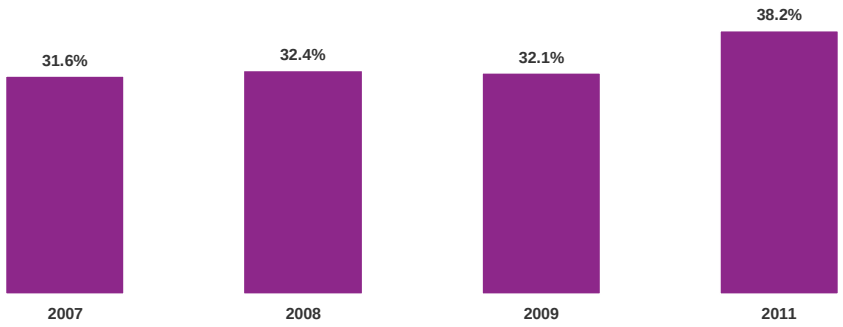
Key results that emerge are:

- Club membership has increased from 32% to 38%
- Strongest increase in club membership levels is amongst the under 25 age group

Previous reports have examined changing patterns of club membership both in terms of the specific sport and individual socio-demographic even though the level of sports club membership at an overall level remained broadly static at 32%. However, economic circumstances meant that a fall in membership levels might have been expected as people reduced their spending levels meaning that club memberships which were not being fully utilised or were no longer affordable may be curtailed. An alternative argument would suggest that increased free time enabled people to take greater advantage of their club membership making it more worthwhile than it would have been previously.

Data collected in the 2011 survey shows a higher level of club membership than seen in previous waves, with 38% indicating that they are a member of a sports club (figure 9.1).

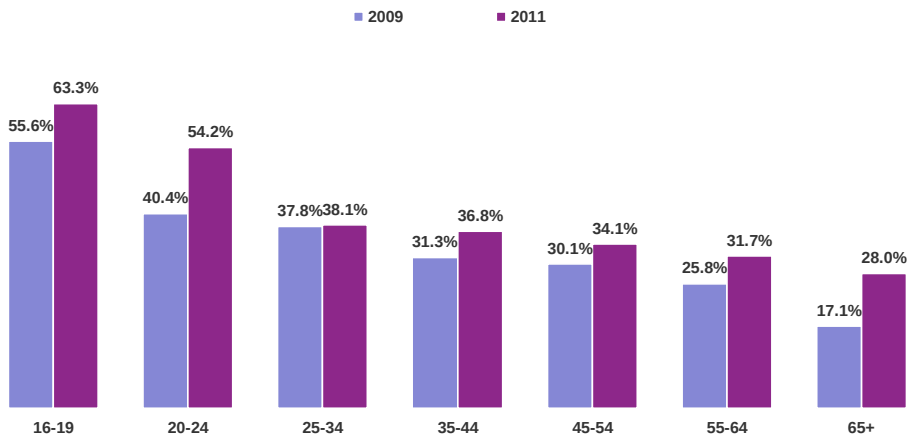
Figure 9.1 – Club membership



In order to understand this difference it is crucial to re-examine some of the trends observed in previous reports to see if they provide an explanation. One of the key dynamics in this regard is the fall in membership levels amongst the under 25s that was noted in the 2009 report. Unemployment within this age group (particularly amongst males) had been increasing dramatically, and given the strong relationship between club membership and income levels, this led to many sacrificing their memberships. In addition, emigration was likely to have a impact, albeit at a smaller scale.

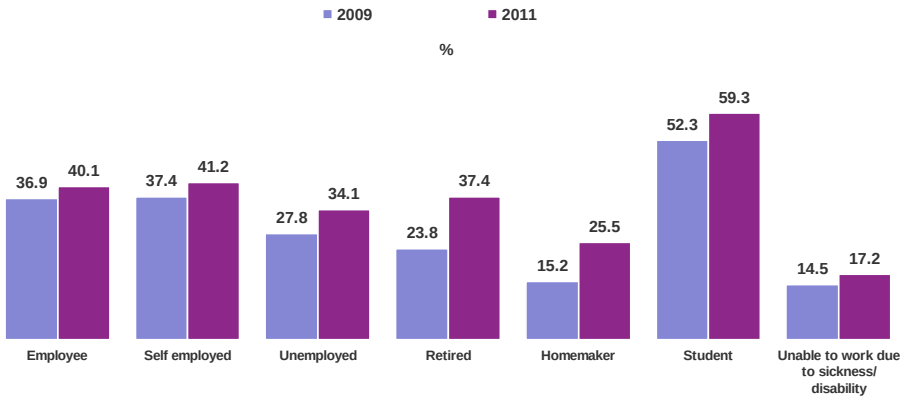
Many of these trends have continued through to 2011, with unemployment and emigration levels increasing further. It is worthwhile examining club membership levels amongst some of these key groups. Figure 9.2 below illustrates club membership by age, comparing 2011 to 2009. This shows that the pattern of declining club membership across the age groups still exists, however the proportions of each age group indicating that they are members of clubs are higher than previously. Furthermore, it is amongst the under 25 and over 65 age groups where the greatest change has occurred.

Figure 9.2 – Club membership by age



As across other participation metrics, analysis of club membership by working status as in figure 9.3 shows that the two groups that show the strongest difference compared to the previous wave are homemakers and the retired groups. However, membership amongst the unemployed is also higher than measured in the previous wave (and is correlated to the rise in membership amongst the under 25s).

Figure 9.3 – Club membership by employment status



An analysis of membership by type of club in figures 9.4 shows that, as for other participation indicators, the types and general ordering of the five most popular activities are consistent with previous waves. GAA and exercise clubs (primarily gyms) remain the most popular types of clubs in Ireland, with GAA clubs most popular amongst males and exercise clubs most popular amongst females. These two types of club are also those showing the greatest change when compared to the previous wave.

Figure 9.4.1 – Club membership (Males)

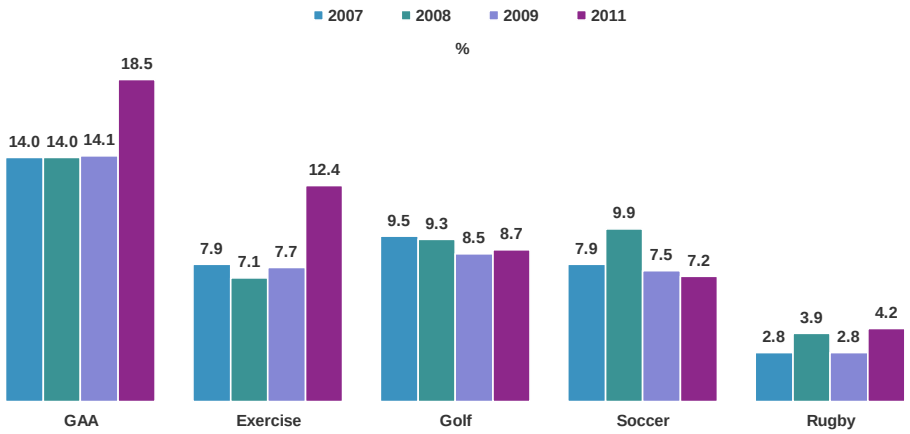
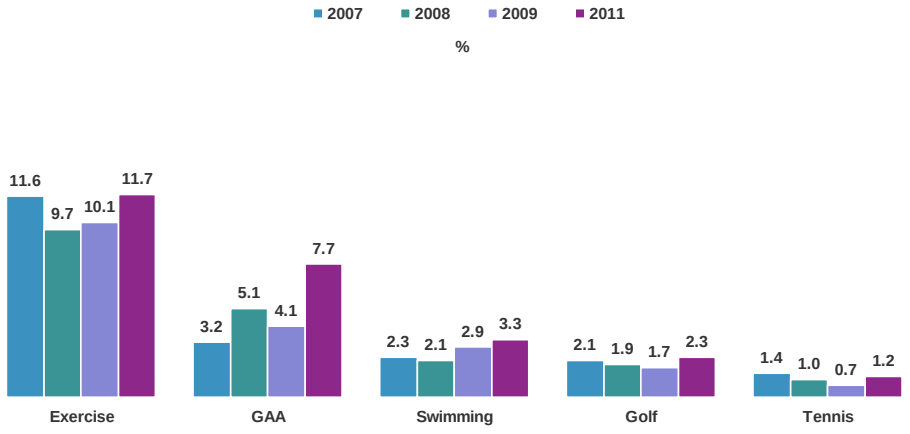


Figure 9.4.2 – Club membership (Females)



Summary

An increase in club membership may initially appear to be counter-intuitive to the economic effects of the recession. However, an alternative perspective may be that those who have additional leisure time have filled this through joining local sporting organisations, or simply becoming more involved and more likely to consider themselves as active members. That the largest increase comes from the under 25 age group, where the highest levels of unemployed exist, may offer some support to this argument.

Attendance At Sporting Events

10. Attendance At Sporting Events

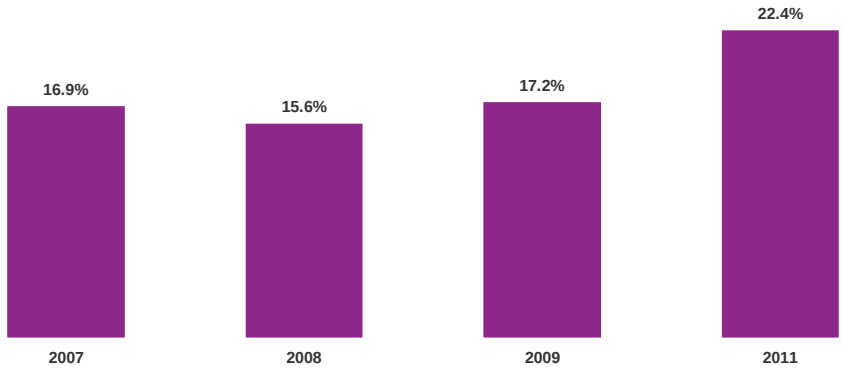
Key results that emerge are:

- Attendance at a sporting event has increased from 17% to 22%,
- The proportion attending a Gaelic Football match has increased from 6% to 8%

Previous versions of the ISM indicated that attendance at sporting events fell from 17% in 2007 to 15% in 2008 before recovering to 17% again in 2009. The economic context was presented as having a dual effect on attendance levels, with the additional free time available to people being balanced against the required outlay when many will be seeking to reduce their discretionary spend.

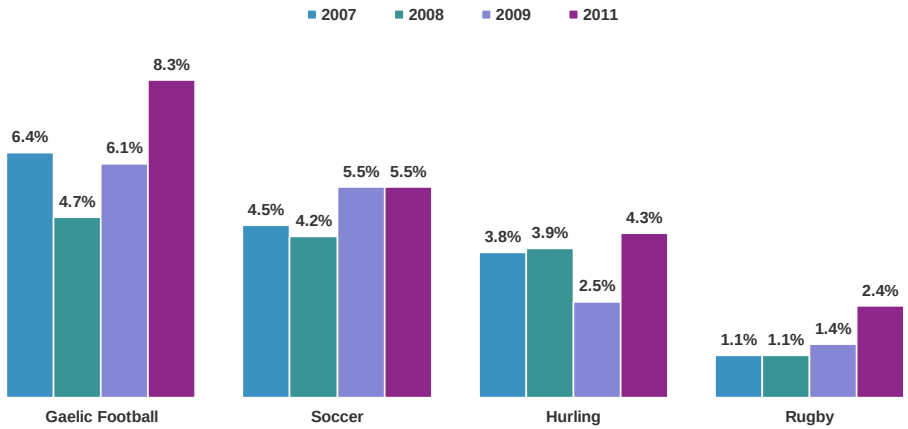
In the 2011 survey, 22% have indicated they have attended a sporting event in the previous seven days, significantly different when compared to previous waves.

Figure 10.1 – Attendance at a sporting event



Unlike with active sporting participation but like other forms of social participation, attendance at events is dominated by team sports. As previously, four sports dominate in terms of attendance and again these are consistent with previous waves in terms of their ordering. Whilst a higher proportion than previously have indicated that they have attended each of the sports, the extent of this difference is in line with the difference for the overall level of attendance between the 2009 and 2011 waves.

Figure 10.2 – Sporting events attended



What is particularly interesting in terms of attendance at sporting events is the degree of homogeneity across the population in terms of the types of events being attended. Overall attendance differs in the same way as outlined in previous reports – i.e. a fall in attendance after the age of 25, followed by a rise in attendance during the family life stage of 36 to 54, before another fall in attendance amongst older age groups. However, examining the types of events being attended by those who are actively attending events shows very few statistically significant differences by gender, age or social class (with only two exceptions across the four main sports – attendance at rugby matches is higher amongst males and attendance at hurling matches is higher amongst the farming community).

Summary

As with club membership the increase in attendance at events may not be expected in the context of economic constraints. However, it may make sense in terms of it being a way to fill increased leisure time - particularly through events that are free of charge such as children's sporting events.

Social Participation & Nationality

As a final note to this section it is worth highlighting a common theme across the social participation dimension in terms of the difference between Irish and those of another nationality (figure 10.3). Irish people are more likely to have a social involvement in sport, despite being no more likely to be actively participating in sport. This is particularly noticeable in terms of volunteering, but the difference between the two groups in terms of club membership and attendance at events are also very strong.

Figure 10.3 – Social participation by nationality

This is important in respect of sporting organisations being a key element in integrating and maintaining communities, yet specific groups in Irish communities remain under-served by these structures. In addition, it presents a significant opportunity for sporting organisations to broaden their membership base and involvement levels.

Policy Implications

11. Policy Implications

11.1 Introduction

As the most comprehensive study of sports and physical participation, a central function of the Irish Sports Monitor is to inform policy aimed at developing sport in Ireland, both in terms of physical and social participation. The 2011 study takes place at a time of significant change, which presents a number of challenges and opportunities for Irish sports policy. A number of specific themes that impact on policy are explored below.

11.2 Increased Focus on the Individual

The 2011 study identifies a widening gap between the proportions taking part in individual compared to team sports, with activities such as swimming, running and cycling becoming very prominent in the activity profile of Irish people.

Economic changes in recent years may have led to an increased focus on health and wellbeing, and many may have taken advantage of additional free time available to them to increase their levels of physical activity. Individual sports, by their flexible nature provide an ideal way to accommodate an individual's own timetable and ability. Arguably, the structured nature of team sports does not provide the same opportunity, in particular for those taking up sports later in life.

Initiatives developed over the past number of years by organisations such as the Local Sports Partnership network have undoubtedly contributed towards the overall increase in activity. If the trend towards individual sports continues in the coming years it will be important to maintain a focus on ensuring that sufficient opportunity and encouragement exists for individuals to get involved in activities that may appeal to them. Local Sports Partnerships undoubtedly have a significant role to play in this regard, and initiatives such as the Meet & Train groups and Safe Cycling programmes will be key in encouraging further participation and maintaining initial interest in sport.

A further opportunity exists in terms of identifying ways in which this new activity can be channelled through formalised club structures. It is likely that many of those taking up these activities for the first time are doing so outside of the club environment, and it may never occur to them to join a club to further their interests in the activity. This may be despite many of these individuals actually taking part in the sport on a "competitive" basis (an example of this is the growth in entrant numbers over the past number of years in running and triathlon races).

In order to maximise this opportunity, clubs will need to demonstrate to newer participants in sport how their involvement in a club will facilitate them in meeting their objectives from the sport. Key to doing this will be ensuring that the club environment is managed in such a way that has a suitable focus on newcomers and proactive recruitment of potential members at relevant events.

In doing so, clubs need to ensure that their structures recognise and can adapt to the lifestyle factors that may be driving the increased desire for individual sports (for example, flexibility in training schedules and times). Addressing these issues will require clubs to work in collaboration with potential new members.

11.3 Targeting Sedentarism

Sedentarism and associated problems are likely to be key challenges facing society over the coming years. Not tackling these challenges, or doing so in an ineffective manner will result in major future economic and social costs. Significant health benefits would accrue from encouraging sedentary people to become active, hence this is a important policy consideration.

Whilst sedentarism is declining at an overall level, certain groups appear more prone to a sedentary lifestyle, including males over 45, females aged over 65, and those living in isolated areas (in many cases these are likely to be linked to one another). Each of these groups is likely to have particular reasons that determine their inactivity, but there are a number of findings from this study that may play a significant role in overcoming the high levels of sedentarism within these groups.

Middle-aged females appear to be unique in terms of their sporting behaviour, in that (unlike their male counterparts) they appear to be less likely to cease particular sporting activities and more likely to adopt new activities. Given their strong family role, they may represent a conduit through which the activity of others (such as older males and children) can be influenced. Further work would be needed in order to identify whether this would be an effective way in which to influence the behaviour of others, but it is worthy of consideration.

Recreational walking represents a gateway activity through which those who are sedentary can be encouraged to get active. In this context it is worth examining how individuals are facilitated to get involved in this particular form of activity, and whether the greater promotion of safe and attractive walking routes such as the extensive network of existing walking “ways” around the country would result in increased activity, particularly in rural areas.

11.4 Overcoming the Social Gradient that Exists within Physical Activity

A clear theme running through this report is the difference in participation across the social gradient, with those in less advantaged groups being less likely to participate in all forms of physical activity. This differential is common across all dimensions that are analysed – income, education and socio-economic status. Similarly it has been extensively reported both in previous versions of the ISM and other similar studies that have been conducted.

Maximising the levels of physical activity for less advantaged groups presents a significant challenge in terms of policy formulation, but is crucially important in mitigating future problems such as those outlined above.

The exact reasons for the social gradient are likely to be complex in nature and involve a variety of economic and societal factors. As a result any effective solution is likely to be similarly complex. Extensive further study will be needed both in terms of identifying these solutions and ways in which they can be implemented.

In this regard, fiscal incentives could perhaps be considered. In recent years, extensive work has been done in encouraging cycling to work through the provision of tax incentives, and the success of these schemes are evident in this report. Further consideration is needed in terms of how this success can be leveraged to the benefit of the wider population and to encourage participation in other forms of activity.

11.5 Shortfall in Achieving Minimum Required Levels of Activity

Activity levels for individuals in many sports are not sufficient to achieve recommended minimum levels of activity, with over half of those participating in a sporting activity not doing so to a sufficient intensity or frequency to meet these requirements. This presents a significant challenge in terms of the role of physical activity in overcoming the future health challenges caused by an obesity crisis.

This study does not explore whether or not individuals perceive that their activity is sufficient, but it could be speculated that many of these individuals mistakenly believe that they are sufficiently active to maintain high quality, long term physical benefits.

Sporting participation and recreational walking are undoubtedly key elements in achieving the recommended activity guidelines, particularly when conducted in combination with one another. The majority of those meeting the requirements are involved in more than one type of activity (e.g. sports and recreational walking), and this is key to maintaining a sufficient level of activity. The analysis in this report would suggest that many are curtailing their sporting activity later in life and their overall activity is becoming more focussed on walking. This is worthy of further consideration, particularly in terms of how particular groups can be encouraged to maintain their sporting activity.

Further education is needed to ensure that individuals are aware of the levels and types of activities they need to be doing, and suitable opportunities must exist to enable them to develop an interest and get further involved. Increased levels of physical activity is a key strand in tackling the obesity crisis as well as in adding to the health capital within the population, and effective resources need to be allocated to ensure that this happens within the wider population.

11.6 Unlocking the Desire to Participate in More Activities

On a more positive note to the above point, there appears to be a general desire to increase activity levels. This exists throughout the spectrum of activity levels, but is stronger amongst those who are less active or sedentary.

As outlined in other studies, and re-asserted in this study, the barrier to increased participation is a perception of not having sufficient free time to incorporate physical activity. However, health factors also arise as a concern amongst those who are less active. A perception may exist for some that they are “too unfit” to exercise and social concerns may prevent them from doing so. Initiatives will be required to overcome these concerns and to ensure that all individuals have access to a form of physical activity that is suited to their own situation.

Walking appears to be the gateway activity in this regard, although as noted above, the challenge will be to ensure that these individuals progress beyond this to develop an interest in activities that deliver additional physical benefits. Popular sporting activities for those seeking to enhance their levels of activity include swimming and cycling, and initiatives focussing on increasing activity levels should focus on these particular sports.

11.7 Understanding the Gender Differences in Cycling as a Form of Transport

A clear gender divide exists in terms of cycling for transport, with men much more likely to choose this form of transport. The exact motivations that are determining this are not clear from the ISM and it is an area worthy of further research. At this point we can only speculate as to the underlying factors, but it may be due to a combination of transport patterns (for example, women more likely to drop children to school), safety or image perceptions (for example, arriving at work after cycling in inclement weather or female business attire being unsuitable for cycling). The differences are strongest amongst the younger age groups, and therefore policy initiatives should be targeted at those aged under 35.

Developing a further understanding of this dynamic is key from a policy perspective, particularly given the significant investments made in this area in recent years. Initiatives such as the Cycle to Work and the Dublin Bikes schemes have involved considerable investment, in addition to the extensive work that has been done developing a network of cycle lanes throughout Irish towns and cities. In order to maximise the numbers who can take advantage of these investments, any barriers to cycling for transport need to be addressed and appropriate steps taken to overcome them.

11.8 The Importance of Social Participation

Social participation is undoubtedly important both in terms of maintaining sporting structures and wider community involvement. That the 2011 ISM identifies an increase in social participation is encouraging, and there is undoubtedly further opportunity to increase the level of involvement further into the future (particularly through engaging with specific groups who are unemployed in terms of voluntary activity).

Much of this social participation is likely to be informal in nature (such as driving children to sports training and events) and the importance of this within the sporting environment needs to be recognised. Formalising the basis of this involvement would undoubtedly strengthen sporting structures, providing increased club involvement which in turn nourishes sport itself.

Technical Appendix

12. Technical Appendix

12.1 Introduction

One of the functions of the ISM is to track the level of participation in sport and exercise over time. The previous reports examined these trends both at overall and socio-demographic subgroup levels across all aspects of social and active participation. In doing so it identified a number of changes, particularly in terms of the changing nature of participation in the context of major economic changes and rising levels of unemployment.

As outlined earlier in this report, in 2011 there was a change in the supplier of data collection from Economic and Social Research Institute (ESRI) to Ipsos MRBI. In order to minimise disruption to the historic data trends, Ipsos MRBI replicated the approach used by ESRI in terms of survey design, sampling and data collection methodology. The only change adopted was that telephone interviewing was conducted by Computer Assisted Telephone Interviewing (CATI) in a central location by Ipsos MRBI, whereas ESRI interviewers worked independently from home calling designated numbers supplied by ESRI, and collecting data using a pen and paper method. Both surveys are weighted in line with the national population and as a result the socio-demographic profile of each sample is reflective of the population at that time. Key profiling information for the two samples is provided below.

Variable		2009	2011
Gender	Male	49.3%	49.6%
	Female	50.7%	50.4%
Age	Under 20	6.5%	6.7%
	Under 25	15.3%	14.4%
	Under 35	37.0%	37.5%
	Under 45	56.3%	58.0%
	Under 55	72.4%	75.4%
	Under 65	84.4%	89.3%
	Under 75	95.0%	95.3%
Employment	Participation rate	62.0%	60.5%
	Unemployed	15.5%	17.4%
Location	City	29.4%	20.5%
	Town	26.5%	27.6%
	Village	13.5%	22.4%
	Isolated location	30.5%	29.0%

Despite this general continuity in data collection approaches, a number of significant changes in the data were observed and detailed consideration is needed to identify the extent of “real changes” in the data as opposed to changes caused by the change in survey supplier.

12.2 Initiatives Undertaken To Identify Reasons For Differences Between Surveys

From the analysis of interim data as survey fieldwork was in progress it was clear that a difference was emerging between 2011 data and those collected in earlier surveys. In order to explore these differences in more detail and develop an understanding of why they may be occurring, a number of specific initiatives were adopted over the course of the year that involved additional questions being included on the ISM for a short period, or separate studies being conducted in parallel to the ISM.

The initiatives that were adopted, and the rationale for doing so, are listed overleaf. None of these provided a satisfactory explanation that the changes in the results between 2009 and 2011 were due to a change in data collection supplier.

Initiative	Rationale
Using shortened introductions to key participation indicators	To understand whether changes in the way questions are presented to respondents leads to changes in results
Asking respondents directly whether or not they have taken part in particular sporting activities	
Comparing claimed voting behaviour to election results (General Election and Presidential Election)	To compare claimed behaviour in a survey to actual behaviour for which reliable statistics exist

12.3 Differences in educational profiles between 2009 and 2011

Following completion of the 2011 interviewing differences were noted between the profile of respondents in terms of their level of education. Whilst the difference was eliminated through applying a rigorous weighting structure to the data, it was decided to conduct an additional exercise to explore whether setting quotas for educational attainment would change the underlying data.

To complete this exercise 543 interviews were conducted using the same approach and the same questionnaire, with the addition of including a quota on educational attainment. These quotas included five educational categories from Primary level through to Third level and quotas were set to match the unweighted data from 2009.

In interpreting these results it is important to note that all interviews were conducted over a four week period during April and May 2012, so can be affected by seasonal biases or the impact of weather conditions at the time.

The results of this exercise showed that key participation metrics remained consistent with the 2011 study, and (once the data is correctly weighted) similar results are achieved (although there was a slight variance in the case of volunteering) regardless of the inclusion of a quota for educational attainment. These results are shown in the table below.

	ISM 2011	Inclusion of quotas for educational attainment
Recreational walking	66%	67%
Participation in at least one sport	46%	48%
Voluntary activity	15%	12%
Club membership	38%	39%
Attendance at sporting activities	22%	22%
Walking for transport	38%	40%
Cycling for transport	10%	11%

None of the differences outlined above are statistically significant (at 95% confidence level), which provides further confidence in the integrity of the 2011 data.

12.4 Conclusions

In survey research a change of data collection supplier can often lead to a change in the way a survey is implemented which in turn can impact on the results. In establishing the ISM study for 2011 extensive work was done to mitigate any impact of this change in supplier, despite which a considerable change in the results occurred.

The various initiatives conducted during data collection to understand the emerging changes did not provide conclusive evidence to explain how this change emerged. At the same time, it is impossible from these initiatives to dismiss a potential impact of a supplier change. It is likely that societal change due to the economic downturn in recent years has led to a change in sporting behaviour, however without running parallel studies untangling this from the potential impact of a supplier change is not feasible.

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