Enriching our understanding of less active Londoners to target and tackle inactivity

Webinar 1: Segment Introduction 12th June 2019
Your speaker

Daniel Stracey
Senior Insight Manager and Segmentation Lead
London Sports objective

To help London become the most physically active city in the world by focussing on the 2.6m less active Londoners (i.e. those less active than 150 mins per week)
To enrich understanding of less active Londoners and develop resources for more effective targeting, engagement and outreach

**Segmentation vision and objectives**

- Develop a stronger sense of instinct, empathy and understanding
- Determine segment representation and relevant opportunities to connect
- Develop knowledge of best practices and improve communications
Our holistic two phase approach

Working with independent research agencies we have combined qualitative and quantitative insight for a richer more holistic perspective

**Phase 1**
Qualitative foundation
Key facts

- 4 ‘core’ segments identified
- In home interviews and online mission diary tasks
- Pen portraits and showreels developed to bring segments to life
- Internal London Sport stakeholder workshops

**Phase 2**
Quantitative validation
Key facts

- 7 segments deduced using factor and cluster analyses
- Online survey based methodology to determine segments focussing on mindset attitudes and behaviours
- n=2000 sample of less active adults aged 16+, living and /or working in London
Introducing the segments
London’s seven less active segments

ELDERLY EVADERS
ANXIOUS AVOIDERS
WANT TO BUT CANT
YOUNG IMPRESSIONABLES
TIME POOR INTEGRATORS
INCONSISTENTLY INVOLVED
ALMOST ACTIVES

Number of Londoners
310k 335k 335k 388k 310k 491k 413k
Elderly Evaders

IN THEIR OWN WORDS...

“At the moment I do not want to be more active. Maybe if all those exercises and activities were fun and easy, I would start being more active.”

“I don’t want to be more active. I have far more things to do. I prefer cerebral activities.”

ACTIVITIES MAKE THEM FEEL...

<table>
<thead>
<tr>
<th>Feeling</th>
<th>Percentage</th>
<th>Sample Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>UNINTERESTED</td>
<td>58%</td>
<td>294</td>
</tr>
<tr>
<td>UNEASY</td>
<td>19%</td>
<td>99</td>
</tr>
<tr>
<td>ANNOYED</td>
<td>7%</td>
<td>110</td>
</tr>
<tr>
<td>REPULSED</td>
<td>5%</td>
<td>191</td>
</tr>
</tbody>
</table>

PERCEIVED HEALTHINESS

Lifestyle, routine, mental/physical health

Children in HH: 23% (75)
Retired: 41% (214)

AVERAGE

AB: 32% (120)
Elderly Evaders

TOP BARRIERS TO BEING MORE ACTIVE

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I’d rather spend the free time that I have doing things I really enjoy</td>
<td>94% (181)</td>
</tr>
<tr>
<td>I know it’s important but I don’t feel it’s urgent</td>
<td>64% (197)</td>
</tr>
<tr>
<td>I would only exercise more if told to do so by my Doctor / GP</td>
<td>45% (262)</td>
</tr>
<tr>
<td>I don’t see the point in exercising</td>
<td>33% (297)</td>
</tr>
</tbody>
</table>

AMOUNT OF TIME SPENT BEING ACTIVE

<table>
<thead>
<tr>
<th>Time</th>
<th>Percentage</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 30 mins</td>
<td>67%</td>
<td></td>
</tr>
<tr>
<td>30-75' mins</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>75-150'</td>
<td>19%</td>
<td></td>
</tr>
</tbody>
</table>

TOP ACTIVITIES

- Dance class: 36% (61)
- Walk 10min: 8% (69)
- Swimming: 6% (47)

CURRENT BEHAVIOURS

- Not interested in becoming more active: 44% (342)
- Not thinking about it
- Getting prepared to become more active
- Been more active / Trying to get back
- Made proactive steps
- Trying to become more active
- Keep active no matter what
Anxious Avoiders

IN THEIR OWN WORDS

“Know I need to but can’t get the motivation. My friends are either very fit or not interested in starting so feel haven’t got anyone to start with”

“I am obese and have arthritis in knees and hips. This has been largely instrumental in my reluctance to take on board doing some fitness that is weight bearing”

ACTIVITIES MAKE THEM FEEL...

- UNEASY: 51% (267)
- EMBARRASSED: 40% (283)
- DESPAIRING: 31% (292)
- HUMILIATED: 17% (328)

PERCEIVED HEALTHINESS

Lifestyle, routine, mental/physical health

- Unhealthy
- Healthy

- Children in HH: 45-64 47% (141)
- PT / Home / Unemployed: 27% (89)
- E 20% (140)

31% (292) 40% (283) 51% (267) 17% (328) 20% (140) 13%
Anxious Avoiders

TOP BARRIERS TO BEING MORE ACTIVE

- I just don’t feel good doing physical activity: 80% (261)
- I’m not skilled or fit enough to be active: 76% (268)
- I don’t even know where to begin: 61% (247)
- I don’t know how to become more active: 46% (252)

CURRENT BEHAVIOURS

- Not interested in becoming more active: 26% (174)
- Not thinking about it
- Getting prepared to become more active
- Been more active / Trying to get back
- Made proactive steps
- Trying to become more active
- Keep active no matter what

AMOUNT OF TIME SPENT BEING ACTIVE

- Less than 30 mins: 58%
- 30-75’ mins: 20%
- 75-150’: 22%

TOP ACTIVITIES

- 45% Walk 10min (87)
- 13% Swimming (74)
- 11% Home fitness DVD (100)
Want-to-but-can’t

IN THEIR OWN WORDS...

“I have severe arthritis so exercise is an issue for me, I do as much as I feel able to but I would like to be able to do more in the future”

“As a disabled person, I would enjoy the company of other people working together to get fit in a relaxed friendly atmosphere, but I would need transport to access such an activity”

ACTIVITIES MAKE THEM FEEL...

<table>
<thead>
<tr>
<th>Feeling</th>
<th>Percentage</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>DOWNHEARTED</td>
<td>26%</td>
<td>200</td>
</tr>
<tr>
<td>DESPAIRING</td>
<td>25%</td>
<td>234</td>
</tr>
<tr>
<td>ANNOYED</td>
<td>11%</td>
<td>174</td>
</tr>
<tr>
<td>HUMILIATED</td>
<td>8%</td>
<td>163</td>
</tr>
</tbody>
</table>

PERCEIVED HEALTHINESS

Lifestyle, routine, mental/physical health

Unhealthy Healthy

Children in HH 33% (182)
Unemployed/retired 19% (67)
£203
LOW 28% (194)
TOP BARRIERS TO BEING MORE ACTIVE

- 96% (169): I can’t run / play sports like I used to
- 88% (171): I used to enjoy sport/physical activity when I was younger
- 87% (178): My health is deteriorating – I’m not fit like I used to be
- 53% (185): I worry that I might get injured or experience pain

CURRENT BEHAVIOURS

- 29% 119: Not interested in becoming more active
- Not thinking about it
- Getting prepared to become more active

- 20% 152: Been more active / Trying to get back
- Made proactive steps
- Trying to become more active
- Keep active no matter what

AMOUNT OF TIME SPENT BEING ACTIVE

- 45%: Less than 30 mins
- 23%: 30-75’ mins
- 32%: 75-150’

TOP ACTIVITIES

- 48%: Walk 10min (93)
- 12%: Home fitness using online workouts (66)
- 7%: Yoga / Pilates (62)
IN THEIR OWN WORDS...

“I need in addition to professional advice somebody who could monitor my progress and encourage me on a regular basis”

“I wish there was a group of people the same fitness level as me that I could do exercise with and could afford it”

ACTIVITIES MAKE THEM FEEL...

- INTIMIDATED 34% (208)
- EMBARRASSED 27% (192)
- JUDGED 24% (206)
- SHY 21% (187)

PERCEIVED HEALTHINESS
Lifestyle, routine, mental/physical health

Unhealthy

Healthy
TOP BARRIERS TO BEING MORE ACTIVE

- I’m a bit embarrassed about how unfit I am: 73% (179)
- I need others to help motivate me: 71% (195)
- I worry that I will be judged by other people: 58% (191)
- I feel under pressure from my friends/family to exercise: 32% (203)

CURRENT BEHAVIOURS

- Not interested in becoming more active
- Not thinking about it
- Not interested in becoming more active
- Getting prepared to become more active
- Been more active / Trying to get back
- Made proactive steps
- Trying to become more active
- Keep active no matter what

AMOUNT OF TIME SPENT BEING ACTIVE

- 45%: Less than 30 mins
- 23%: 30-75’ mins
- 32%: 75-150’

TOP ACTIVITIES

- Home fitness using online workouts: 26% (141)
- Yoga / Pilates: 16% (138)
- Home fitness DVD: 15% (130)
**IN THEIR OWN WORDS**

“"I need more hours in the day! Working full time, very active kids and household responsibilities keep me busy from 6.30am until 10pm Mon-Sat”

“"The expense of things holds me back. I prefer to keep fit whilst having fun or learning a skill e.g. Dance lessons, however these are expensive”

**ACTIVITIES MAKE THEM FEEL...**

- **MOTIVATED**: 33% (160)
- **ENERGISED**: 29% (181)
- **EXCITED**: 28% (182)
- **RELAXED**: 22% (132)

**PERCEIVED HEALTHINESS**

*Lifestyle, routine, mental/physical health*

- Unhealthy
- Healthy

**25-34**
- **28% (160)**

**Children in HH**
- **44% (145)**

**Work FT**
- **55% (134)**

**££**
- **HIGH 42% (126)**
Time Poor Integrators

TOP BARRIERS TO BEING MORE ACTIVE

- I struggle to fit in proper exercise alongside work/family: 90% (226)
- My life is busy enough as it is: 78% (251)
- It’s too much hassle to arrange and plan: 56% (151)
- Childcare or work logistics make it impossible: 52% (300)

CURRENT BEHAVIOURS

- Not interested in becoming more active: 35% 232
- Not thinking about it: 23% 168
- Getting prepared to become more active: 35% 232
- Been more active / Trying to get back: 23% 168
- Made proactive steps: 23% 168
- Trying to become more active: 23% 168
- Keep active no matter what: 23% 168

AMOUNT OF TIME SPENT BEING ACTIVE

- Less than 30 mins: 45%
- 30-75’ mins: 23%
- 75-150’ mins: 32%

TOP ACTIVITIES

- Walk 10m: 66% 120
- Running: 26% 134
- Home fitness using online workouts: 22% 120

Children in HH: 44% (145)
Work FT: 55% (134)

TOTAL

- 25-34: 28% (160)
- 42-54: 44% (145)
- 55+: 32% (134)
Inconsistently Involved

IN THEIR OWN WORDS...

“I would need to balance work/home and me life. If I could have an incentive such as quicker results that are guaranteed or coupons that would make a massive difference”

ACTIVITIES MAKE THEM FEEL...

- RELAXED: 20% (124)
- EXCITED: 18% (116)
- CHEERFUL: 16% (134)
- ENERGISED: 16% (103)

PERCEIVED HEALTHINESS

Lifestyle, routine, mental/physical health

<table>
<thead>
<tr>
<th>Lifestyle</th>
<th>Children in HH</th>
<th>Work FT</th>
<th>AVERAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>25-44</td>
<td>23% (134)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Children in HH</td>
<td>40% (130)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work FT</td>
<td>55% (134)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AVERAGE</td>
<td>41% (116)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

19%
Inconsistently Involved

TOP BARRIERS TO BEING MORE ACTIVE

1. I don’t know how to become more active - 32% (178)
2. There are no suitable facilities around me - 29% (198)
3. The only physical activity I’m interested in doing is proper sports - 25% (288)
4. I don’t see the point in exercising - 20% (182)

CURRENT BEHAVIOURS

- Not interested in becoming more active
- Not thinking about it
- Getting prepared to become more active
- Been more active / Trying to get back
- Made proactive steps
- Trying to become more active
- Keep active no matter what

AMOUNT OF TIME SPENT BEING ACTIVE

- 45% for Less than 30 mins
- 39% for 30-75' mins
- 27% for 75-150'

TOP ACTIVITIES

- Jogging (165) - 31%
- Cardio at the gym (152) - 21%
- Road Cycling/Mountain biking (182) - 17%

AVERAGE

- 25-44: 23% (134)
- Children in HH: 40% (130)
- Work FT: 55% (134)
- C2 DE AVERAGE: 41% (116)
Almost Actives

IN THEIR OWN WORDS...

“I’m already sufficiently active on a regular DAILY basis. Not looking for change”

“Easier ways to find out about exercise groups in my area. I have been looking but can only find expensive gyms or personal trainers”

ACTIVITIES MAKE THEM FEEL...

<table>
<thead>
<tr>
<th>FEELING</th>
<th>PERCENTAGE</th>
<th>NUMBER</th>
</tr>
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<tbody>
<tr>
<td>MOTIVATED</td>
<td>45%</td>
<td>(215)</td>
</tr>
<tr>
<td>ENERGISED</td>
<td>34%</td>
<td>(216)</td>
</tr>
<tr>
<td>RELAXED</td>
<td>32%</td>
<td>(196)</td>
</tr>
<tr>
<td>EXCITED</td>
<td>31%</td>
<td>(207)</td>
</tr>
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PERCEIVED HEALTHINESS

Lifestyle, routine, mental/physical health

16-44: 48% (99)
Children in HH: 27% (87)
Work FT: 42% (101)

HIGH: £B 26% (122)
Almost Actives

**TOP BARRIERS TO BEING MORE ACTIVE**

1. I have the opportunity to be more active 83% (157)
2. I find exercise a pleasurable activity 79% (239)
3. I’m motivated to be more active 78% (213)
4. I’m motivated by the prospect of ‘small victories’ when it comes to sport 61% (184)

**CURRENT BEHAVIOURS**

- Not interested in becoming more active
- Not thinking about it
- Getting prepared to become more active
- Been more active / Trying to get back
- Made proactive steps
- Trying to become more active
- Keep active no matter what

**AMOUNT OF TIME SPENT BEING ACTIVE**

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<td>23%</td>
</tr>
<tr>
<td>75-150’ mins</td>
<td>32%</td>
</tr>
</tbody>
</table>

**TOP ACTIVITIES**

- Running (146) 29%
- Jogging (147) 27%
- Fitness class (e.g. Circuits) (160) 17%
## Segment behaviour and mindset summary

<table>
<thead>
<tr>
<th>Segment</th>
<th>Current levels of activity (out of 10)</th>
<th>Desire to be more active</th>
<th>Emotions associated with activity</th>
<th>Motivation</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANXIOUS AVOIDERS</td>
<td>2.5</td>
<td>![thumbs_down]</td>
<td>UNEASY EMBARRASSED DESPAIRING</td>
<td>Low activity, with low levels of motivation – likely driven by negative emotions</td>
</tr>
<tr>
<td>WANT TO BUT CANT</td>
<td>3.3</td>
<td>![thumbs_up]</td>
<td>DOWNHEARTED DESPAIRING ANNOYED</td>
<td>Low activity with a desire to do more though feeling frustrated about their ability to do so</td>
</tr>
<tr>
<td>YOUNG IMPRESSIONABLES</td>
<td>3.8</td>
<td>![thumbs_up]</td>
<td>INTIMIDATED EMBARRASSED JUDGED</td>
<td>Low activity – would like to be more active though some reticence due to embarrassment</td>
</tr>
<tr>
<td>ELDERLY EVADERS</td>
<td>4.0</td>
<td>![thumbs_down]</td>
<td>UNINTERESTED UNEASY ANNOYED</td>
<td>Average activity with little desire to do more</td>
</tr>
<tr>
<td>TIME POOR INTEGRATORS</td>
<td>4.4</td>
<td>![thumbs_up]</td>
<td>MOTIVATED ENERGISED EXCITED</td>
<td>Average activity, but real desire to do more as value the benefits</td>
</tr>
<tr>
<td>INCONSISTENTLY INVOLVED</td>
<td>5.1</td>
<td>![thumbs_up]</td>
<td>RELAXED EXCITED CHEERFUL</td>
<td>Higher activity but no strong desire to do more despite feeling quite positive about activeness</td>
</tr>
<tr>
<td>ALMOST ACTIVES</td>
<td>6.0</td>
<td>![thumbs_up]</td>
<td>MOTIVATED ENERGISED RELAXED</td>
<td>Highest activity currently and open to doing more as enjoy it</td>
</tr>
</tbody>
</table>
The most discriminating factors remain consistent with initial qual findings
Different strategies will be required to engage segments effectively

**COM-B Model**

<table>
<thead>
<tr>
<th>Segment</th>
<th>Number of Londoners</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elderly Evaders</td>
<td>310k</td>
</tr>
<tr>
<td>Anxious Avoiders</td>
<td>335k</td>
</tr>
<tr>
<td>Want to But Can't</td>
<td>335k</td>
</tr>
<tr>
<td>Young Impressionables</td>
<td>388k</td>
</tr>
<tr>
<td>Time Poor Integrators</td>
<td>310k</td>
</tr>
<tr>
<td>Inconsistently Involved</td>
<td>491k</td>
</tr>
<tr>
<td>Almost Actives</td>
<td>413k</td>
</tr>
</tbody>
</table>
Activation opportunities
Insight Portal key resources

London Sport segmentation foundation resources

Materials available from 21st June
https://data.londonsport.org/
Insight activation working in partnership with London Sport

Our steering group, ongoing intelligence gathering, in-house tools and bespoke insight consulting services

- Enrichment workshops
- Intervention audits
- Communication development
- Applied behavioural change techniques
- Impact and evaluation
- Co-creation

Contact insight@londonsport.org together with your Relationship Manager to discuss opportunities
Stay tuned for part 2!
19th June 3pm Segment Engagement Opportunities

Materials available from 21st June https://data.londonsport.org/
Insight@londonsport.org
It's about finding your thing. This is definitely my thing.

- Jess, 24