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‘Future of Sport’ Public Opinion Research

Executive Summary

Prepared for the Department of Canadian Heritage

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Executive Summary

Phoenix Strategic Perspectives (Phoenix SPI) was commissioned by the Department of Canadian Heritage (PCH) to conduct public opinion research (POR) with Canadians on their motivations, intentions, barriers, experiences, and expectations related to future sport participation.

1. Research Purpose and Objectives

The purpose of the quantitative POR was to collect information on Canadians' perceptions of the future of sports in Canada. The main objective of the research was to respond to the overarching question: "What kind of sport will Canadians engage in, and want, over the next decade?". As such, the survey was designed to explore Canadians' satisfaction with sport opportunities, perceived barriers to participation, intentions vis-à-vis future participation, as well as their motivations and expectations as they pertain to participation in sport and recreational activity.

2. Methodology

A 15-minute mixed-mode survey (online and telephone) was administered to 9,208 Canadian residents aged 16 years or older from May 10th to July 6th, 2022. The target audience for this survey was participants of organized and non-organized sports, as well as recreational activities, including those who have not participated in sport or recreational activities in the last three years but intend to do so in the future. Two sample sources were used: Advanis' General Population Random Sample (GPRS) panel sample and random digit dialling (RDD). Based on a sample of this size, the results can be considered accurate to within $\pm 1.02\%$, 19 times out of 20. The margins of error are greater for results pertaining to subgroups of the total sample and split samples.

3. Highlights

4 in 10 expressed moderate to strong satisfaction with the sport opportunities in their local community; few are dissatisfied.

- The cost of using sport facilities and registering for organized sport programs are the top areas of dissatisfaction among respondents. Exactly one-quarter said they are dissatisfied with the cost to use sport facilities, 24% with the cost of organized sport programs, and 13% with the cost of sport programs available at school.
- Following cost, many were dissatisfied with the facilities available to them: 21% expressed dissatisfaction with the number of sport facilities accessible to them, 13% with the quality of these facilities in their community, and 9% with the quality of these facilities in the schools.

Most are likely to participate in sports in the next 3 to 5 years, including more than one-third who said they are very likely to do so.

- Slightly less than two-thirds of respondents said it is fairly (26%) or very (37%) likely that they will participate in sport in the next 3 to 5 years. Those who expressed satisfied with their sport opportunities were more likely to report a likelihood of future participation in sport (72%) as compared to those who are dissatisfied (64%) or are neither satisfied nor dissatisfied (63%).

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- Among respondents who do not currently participate in sport or recreational activities, 57% are likely to try sports they have never participated in before. Moreover, among those who have participated in organized or non-organized sport in the last 3 years, 56% said it is unlikely they will cease participation in any sport in the future. For those who are likely to quit participating in a sport, the top two reasons offered in explanation were physical injuries (24%) or lack of interest (24%).
- When choosing a sport to participate in in the future, most respondents would be motivated by improved physical fitness (75%) and fun (74%). Following this, half (51%) would look for opportunities for friendship, and 41% would look for relaxation when choosing a sport.

When asked about barriers to participating in sport, cost was mentioned by approximately one-third of respondents.

- Barriers to personally participating in sport included cost, mentioned by 34% of respondents, lack awareness of facilities and sports programs (21%), poor health or fitness (20%), lack interest (19%), ability (17%), and lack of beginner level sport programs (16%). Notably, 18% reported no barriers to participating in sport.
- For those living with a disability, cost (46%) and poor health or fitness (45%) were the most cited barriers to sport participation. Following at a distance, were a lack of awareness (23%), or one's aptitude for sport (22%).

While influences are varied, the ability to be outdoors in nature is a top motivator to future participation in sport.

- Many factors were mentioned as potential influences on future participation in sport, but the ability to be outdoors or in nature (43%) is among the top motivators.
- Following this, approximately three in 10 noted the following influences: the location of sport programs (39%), the cost of the programs (37%), friends and family (35%), an opportunity to engage in social interactions (33%), and opportunities to 'drop-in' or 'pay-to-play' (30%).
- Asked what changes to their personal circumstances *might* encourage their future participation in sport, exactly half mentioned more free time. In addition, 44% said an increase in their fitness levels and 41% said more disposable income might encourage them to participate in sport in the future.

Looking ahead 3-5 years, recreational activities with low risks for personal injury are among the most important elements of sport programs.

- Presented with sets of two items, respondents were asked to identify which among them is of greater importance to them personally. Overall, two-thirds of future sport participants are seeking recreational activities (66%) (as opposed to competitive activities), sports with low potential for injury (66%), and sports that are generally low-risk (66%).

More than one-third have in the past, or currently, volunteer for sport programs.

- Thirty percent of respondents have been a volunteer for a sports program or sports organization and 8% are currently volunteering. An additional 16% have not volunteered in the past but are interested in doing so in the future.
- Among those who have volunteered or plan to in the future, 57% believe training on how to prevent physical injury should be mandatory while half (51%) believe age or stage appropriate skill development should be mandatory training for volunteers.

The majority of respondents anticipate that local sport is intended for fun, recreation, and relaxation and most agree that all levels of sport should receive at least moderate investment from the government.

- Asked what purposes sport will deliver to their local community in the next 3 to 5 years, 79% say sport will serve fun, recreation, and relaxation. Just under two-thirds believe local sport will help residents develop friends and acquaintances (65%) and/or provide opportunities to access sport regardless of income (65%).
- Two-thirds of respondents believe that large-scale international sporting event provide value to Canadians. Reasons offered to explain this point of view included the sense that such events promote a sense of pride and unity (15%), bring communities together (13%), and increase awareness of and exposure to sports and fitness in general (13%). The single largest proportion of respondents (38%) could not offer a reason for why they believe large-scale international sporting events will be valuable to Canadians in the future.
- Overall, most respondents agree that all levels of sport should receive at least moderate investment from the government. Specifically, agreement that the government should place focus on child and youth sports is highest – 58% feel there should be high investment in this area, while one-third feel there should be moderate investment. Fewer agree that a high level of government investment in recreational sport (37% versus 46% who say moderate investment is needed) and elite sport (30% versus 41% who say moderate investment) is needed.

Many respondents agree that inclusion is achieved separating sports programs to ensure fair and safe environments and that sports programs should be designed to welcome everyone to ensure diversity.

- Asked which definition comes closest to describing what inclusion in the context of sports looks like to them, 60% of respondents agreed that “*sports should have separate programs based on age, sex, and ability to ensure that everyone can participate in a fair and safe environment*”. The rest (40%) believe the inclusion in sports programs should have “*mixed-age, mixed-sex, and mixed-abilities...to ensure that everyone feels included*”.
- When asked what diversity might look like in the context of sports, approximately three-quarters (74%) agreed that sports programs “*should be designed to welcome everyone, regardless of things like age, sex, cultural background, religion, or sexual orientation*”. In contrast, one-quarter (26%) believe that diversity in sport programming should “*be designed with specific populations in mind*”.

4. Intended Use of the Results

The findings from this survey will help Sport Canada adapt and prepare for a maximally relevant and responsive sport system, especially considering commitments to increased equity, diversity and inclusion. In particular, the results will inform the Canadian Sport Policy (CSP) renewal priorities, the Equity, Diversity and Inclusion (EDI) review, the Community Sport for All Initiative (CSAI), and foresight work at Sport Canada.

5. Contract Value

The contract value was \$145,333.79 (including applicable tax).

6. Statement of Political Neutrality

I hereby certify as a Senior Officer of Phoenix Strategic Perspectives that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the *Communications Policy* of the Government of Canada and Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do not contain any reference to electoral voting intentions, political party preferences, standings with the electorate, or ratings of the performance of a political party or its leader.



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