

Making London the Heart of the Sport Tech World

**A Strategic Plan of Action
for Technology in London**



Introduction

In 2015, London's *Blueprint for a Physically Active City* was launched, outlining a framework under which London could use physical activity and sport to thrive now, and for the future. The *Blueprint* articulates a shared vision of what physical activity and sport in London could be, and the things that – delivered successfully – it could help us achieve.

// *Making London the Heart of the Sport Tech World* highlights the role that technology has to play in helping more people across the capital get active and enjoy the benefits of physical activity and sport. London has the highest business birth-rate nationally, with over 7,500 start-ups emerging from London's technology industry alone in 2016, but those focused on physical activity and sport only account for a tiny proportion of this.

There is a growing realisation of the role technology can have in helping people to be more active, in turn contributing to a broader range of positive outcomes for London, from improved physical wellbeing to stronger bonds between London's communities. This plans seeks to capitalise on this opportunity.


It also represents the continuation of the innovative work undertaken by London Sport in this field to date: from our early adoption of open data and the OpenActive initiative, to the opening of the Sport Tech Hub – the capital's first ever SportTech focused incubator programme – we have worked hard to demonstrate the value of investing in support for technology. *Making London the Heart of the Sport Tech World* is simply the natural next step for us, and for physical activity and sport in the capital.



Tove Okunniwa

Chief Executive Officer, London Sport





// London is internationally famous for both its innovation and competitive spirit. We see this in London's role as a global hub for technology. Great enterprises across the capital - from major companies, to community startups - have made our city a home to some of the world's brightest talent and most creative thinkers. We also see those qualities reflected in London's proud culture of world leading sport, from the major, elite sports events to activity available to all Londoners in community programmes across our neighbourhoods and parks.

These dual successes, in tech and in sport, are badges of honour for London. But in our ambitions for the future we can do more to bring them together in one. It will help us to build on those successes to achieve so much more, not just in growing the collective economic power of tech and sport but in using that power to change the lives of Londoners from every background and circumstance. Both technology and sport are powerful levers for change that can bring together communities, promote social mobility and reduce isolation.

Great work has been done, by London Sport and others, to get us started. Working together we can make real impacts on the lives of Londoners through promoting and committing to best practice around the potential for technology, data and sport. Making London a global leader in the Sport Tech world is a bold, significant ambition, and it is one that City Hall is proud to support.



Matthew Ryder

Deputy Mayor for Social Integration,
Social Mobility, Community Engagement

// Ask any tech entrepreneur or investor about London's tech sector's successes, from San Francisco to Shanghai, and you will receive a similar answer. They'll talk about our fintech sector, and the unique pool of talent coming from The City and Tech City that powers companies such as Transferwise, Monzo or Funding Circle. The growing field of Artificial Intelligence is also likely to get a mention, in particular DeepMind, which is setting new milestones every year.

But as the sector grows and evolves, new technologies are coming to the fore. We are solving some early problems around the world of work and entertainment, and entrepreneurs are tackling a bigger and far more important challenge: our health and wellbeing. Modern technology is changing behaviour more comprehensively than at any time in history, and London companies are starting to apply this to making our lives happier, healthier and easier.

The London Sport Tech cluster is still in its infancy, but it has been attracting a lot of interest from health professionals and investors alike. As the Internet of Things (IoT) and wearables become more sophisticated, we are able to gather more data. In turn, it becomes easier to find exercise and health routines that are personalised, taking into account things like blood pressure, injuries or medical conditions. We are faced with the possibility of being world leaders in this exciting new technology that delivers on health benefits while creating jobs.

If we act now, I think that asking global investors the same question in two years' time will yield a different result. Our athletes put London on the map in 2012, and our entrepreneurs can do the same in 2018. I look forward to being a part of it.



Russ Shaw

Founder, Tech London Advocates
and Global Tech Advocates

The Opportunity

There is a significant body of evidence that physical activity and sport contributes to positive individual and societal outcomes.

It can improve our physical and mental wellbeing, it helps us develop as individuals, it can bring people and communities together and enhance social inclusion. Recent research by London Sport estimates that physical activity and sport generates a social value of £8.75bn to London¹ – yet 38% of Londoners are not physically active enough to benefit their health.

Technology can help millions of Londoners to improve their lives through increased physical activity. This is an opportunity that must be grasped by ensuring technology meets the digital expectations of Londoners, uses data to design and evolve products and services and makes physical activity and sport easier for Londoners to access and engage with in their daily lives.

There are approximately



8.8

million people living in London
a figure which is expected to grow to almost 10 million by 2025²



38%
of people living in London are either **inactive, or insufficiently active**³



56%
of all physical activity in London, is not listed or discoverable in a digital form⁴



59%
of inactive people want to be more active⁵



Of the **£2.9bn** investment secured by London-based tech companies from January to November 2017, **just £89.8m** was secured by SportTech/HealthTech companies⁶



There are **7.1 million** smartphone owners in London⁷



There are **49,000** weekly Google searches for “play sport” and related terms in London⁸



There are **14,800** weekly Google searches for “fitness classes” and related terms in London⁹



62%

London has the highest level of internet usage across the UK, with **62% of Londoners using smartphone devices** to access the internet⁷



98%

Mobile coverage is exceptional, with **98% of Londoners receiving 3G coverage or better**⁷

1. Sheffield Hallam University / London Sport “Social Return on Investment in Sport and Physical Activity for Greater London” (2017)

2. Office for National Statistics “Population Estimates for UK, England and Wales, Scotland and Northern Ireland” (2017)

3. Sport England “Active Lives Survey” (2017)

4. London Sport “Sample data analysis of the opportunity of open data” (2015)

5. London Sport “Bigger and Better Workforce Review” (2017)

6. UK Tech News “UK Investment Tracker” (2017)

7. Deloitte “There’s no place like phone - Consumer usage patterns in the era of peak smartphone” (2016)

8. Google Trends “Play sport” (2017)

9. Google Trends “Fitness classes” (2017)

The Possibility



A Plan for Making London the Heart of the Sport Tech World

This plan has been developed with a view of supporting a long-term vision of making London the most physically active city in the world.

It has been created with an ambition to revolutionise the ways that sport and technology work together. Critically, it is a plan that envisions an environment where barriers are broken down, and opportunities are opened up.

This is not simply about using technology to increase participation in physical activity for its own sake. The unique contribution that sport can make to London manifests itself in a broad array of positive outcomes, from better physical health, to increased mental resilience, and firmer bonds between Londoners from every walk of life. Technology has its own unique contribution to make in finding new and innovative ways to address societal challenges.

Technology and grassroots sport are at the beginning of a journey that will need innovation, collaboration, leadership and community to achieve the extent of their ambitions. Since the publication of the *Blueprint for a Physically Active City*, new strategies from Government, Sport England and the Mayor of London have shown increasing convergence around the vital role of technology in changing people's behaviours and attitudes towards physical activity. *Making London the Heart of the Sport Tech World* draws together these key strands with a view to empowering more organisations to capitalise on the growing bonds between technology and physical activity.

- **Department for Digital, Culture, Media and Sport**

"All organisations that receive funding from Sport England will be required to make data which is relevant to getting more people involved in physical activity and sport publicly available in an agreed format."



Department for
Digital, Culture
Media & Sport

- **Sport England**

"Helping sport keep pace with the digital expectations of customers – making it as easy to book a badminton court as a hotel room."



- **Mayor of London**

"Data for London: A City Data Strategy notes data's potential to transform public services and drive innovation."

MAYOR OF LONDON

- **Blueprint for a Physically Active City**

"Physical activity and sport needs to be at the forefront of exploring new opportunities – technological and otherwise – not simply content to try and keep pace."



The Two Strategic Priorities

Making London the Heart of the Sport Tech World focuses on two long-term strategic priorities.

These priorities are focused on the role of technology itself, and the role of organisations in creating the right conditions to enable technology to play a full role in the future of physical activity and sport.

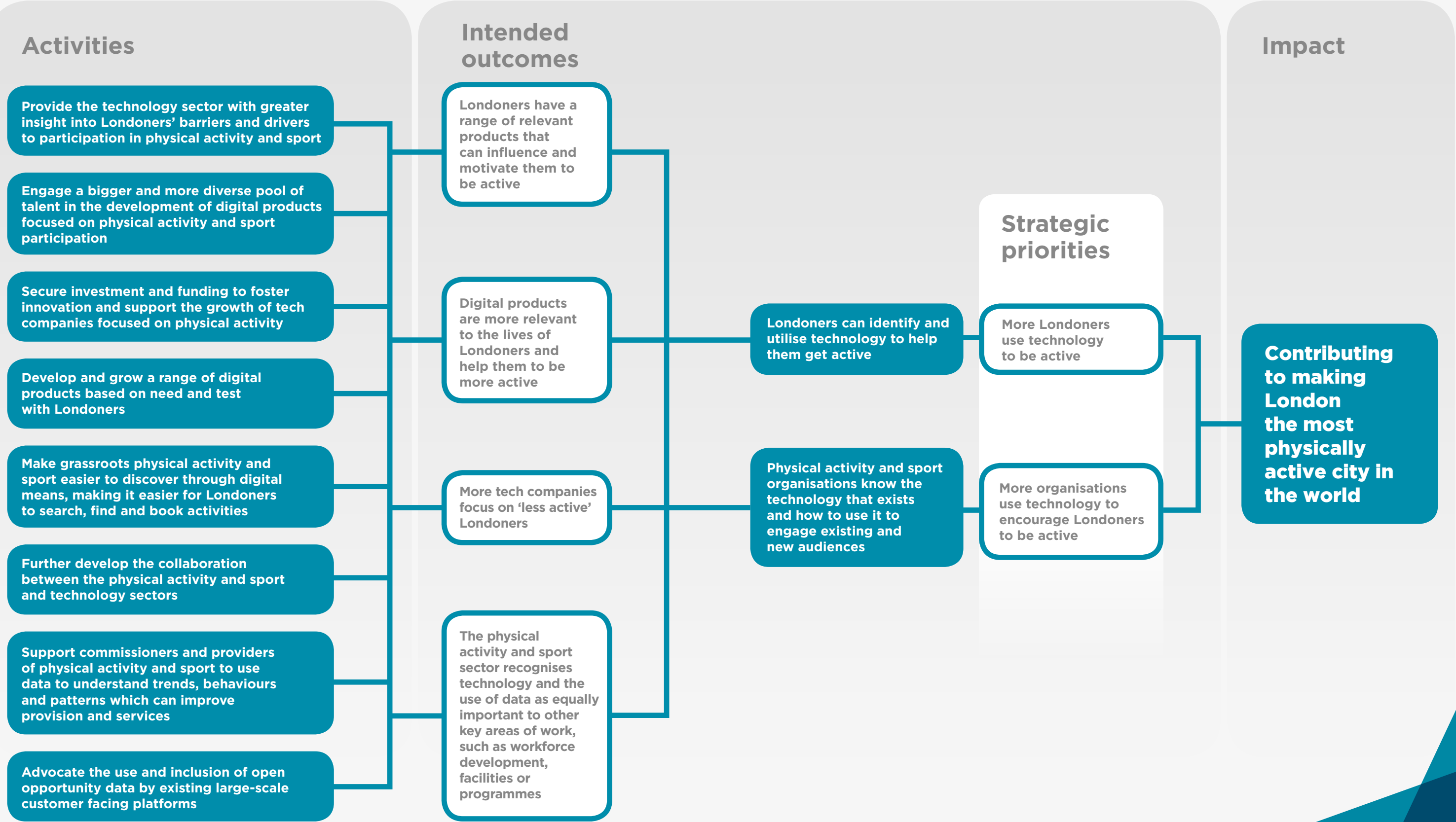
1 More Londoners use technology to be active

2 More organisations use technology to encourage Londoners to be active

These strategic priorities are underpinned by activities and outcomes structured to secure buy-in and involvement from individuals and organisations from the technology and physical activity and sport sectors.



A Framework for Making London the Heart of the Sport Tech World



A man with a beard and dark hair is shown from the chest up. He is wearing a dark blue t-shirt and a black smartwatch on his left wrist. He is holding a black smartphone in his right hand. The background is blurred, showing what appears to be an indoor setting with a window. The image is partially obscured by a white, angular shape that contains text.

Implementing the Plan

London Sport has a clear role to play in bringing together and supporting physical activity and sport organisations in London to advocate for the greater use of and engagement with technology and data.

We will continue to support tech companies focused on physical activity, support Londoners in searching, finding and booking activity opportunities and continue to contribute to existing initiatives.

We will lead the way by creating and investing in projects for the good of the sector and the capital, based on consultation with partners and Londoners, communicating and sharing their results and guidance for the future and identifying and supporting champions within the sectors to communicate and advocate for the use of tech and data.

Our hope is that these steps will make it possible for more organisations – both technology, and physical activity and sport – to work together to create an environment in which physical activity and sport are modernised through effective partnerships.

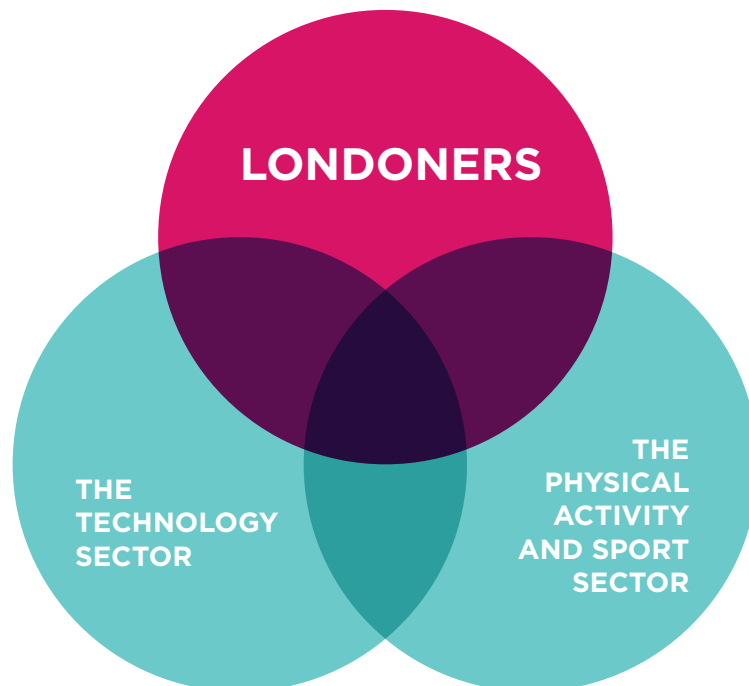
Measuring Success

We recognise the importance of understanding the impact of *Making London the Heart of the Sport Tech World* with our ultimate goal of measuring the progress towards the two strategic outcomes:

1 More Londoners use technology to be active

2 More organisations use technology to encourage Londoners to be active

These two outcomes are linked to the three broad stakeholder groups key to contributing to making London the most physically active city in the world. Below is how, as a baseline, we will measure success of the strategic outcomes and progress with stakeholder groups.



The Technology Sector:

We will work with the technology sector and key stakeholders to track the growth of SportTech. This will include the number of new organisations, the investment they gain and revenues they generate. We will also seek to track the number of SportTech products that are available. Through our own initiatives, such as the Sport Tech Hub, we will track the extent to which technology companies are building knowledge of the barriers and facilitators to active lives.

Londoners:

We will aim to monitor and understand the awareness of and use of SportTech by Londoners in the journey to be more active. It is important to understand how Londoners – particularly less active ones – use technology to support their motivations, behaviours and the role it plays in the overall customer journey towards enabling more physically active lives.

We will also develop measurements to understand the success of the strategic priorities listed in the framework by consulting with Londoners directly. This feedback will allow us to build learning both in terms of what works, and what doesn't. We are committed to sharing this learning and encourage our partners to do the same.

The Physical Activity and Sport Sector:

We will work through our stakeholder network to better understand shifts in attitudes, beliefs and knowledge around using technology and data to achieve their aims. We will identify and showcase examples of where technology has been successfully applied to achieve positive physical activity and sport outcomes.

We would like to thank the following organisations for their contribution to the development of *Making London the Heart of the Sport Tech World*:

- British Orienteering
- Fieldfisher
- Greater London Authority
- London Borough of Islington
- Lawn Tennis Association
- Loughborough in London
- Open Data Institute
- Parkour UK
- RLC Ventures
- Sport England
- St Mary's University
- Swim England
- The Department for Digital, Culture, Media and Sport
- Tech London Advocates
- Tech London Advocates – HealthTech
- Tech London Advocates – Women in Tech
- WellRun Active
- West Ham United Foundation
- London Borough of Westminster
- WHERE



MAYOR OF LONDON

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