



TRACKING TRENDS IN HIGHER EDUCATION SPORT: INSIGHTS FROM THE COMPLETE UNIVERSITY GUIDE DATA 2021-22

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Publication November 2023

THANKS TO...

The staff at Complete University Guide, especially Alison Patterson and Sophie Rogers, who collected the data analysed in this report.

All the BUCS member institutions who completed this survey. Your efforts to complete this survey made it possible for us to produce this report.

BUCS staff and members who provided valuable feedback during our analysis process.

Sport England, for funding this report.



INTRODUCTION

British Universities and Colleges Sport (BUCS) began collaborating with the Complete University Guide (CUG) to collect sport-related data on higher education institutions in the 2017-18 academic year. Since then, BUCS and CUG have collected valuable data for four years (2017-18, 2018-19, 2019-20, and 2021-22; 2020-21 was not carried out due to COVID-19). BUCS used the data to launch a platform to enable members to view the anonymised data and benchmark themselves against other institutions. This report, the first of its kind, aims to provide further information for members and other stakeholders about trends in higher education sport. The BUCS Insight Team will aim to publish a similar report annually using the annual survey data.

We have presented the data in three sections:

- An overview of what higher education sport contributes to the wider sporting ecosystem, including staff, facilities, and sport and physical activity opportunities.
- An analysis and discussion of what makes the BUCS top 20 institutions unique.
- Trends across the four surveys, with a particular look at what has changed since COVID-19.

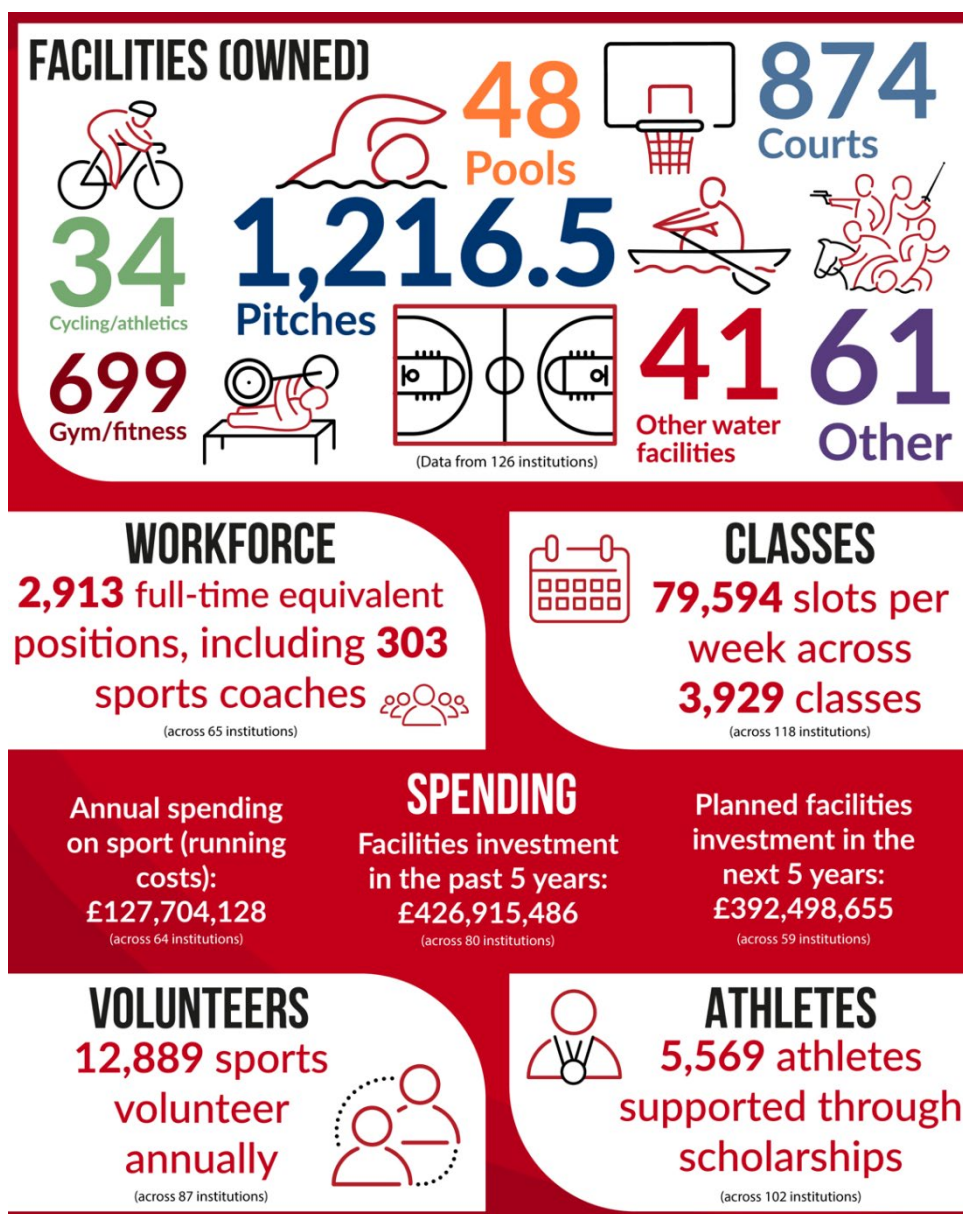
In addition to the report, we have also published an appendix that summarises the answers to the 2021-22 survey, including how many institutions answered each question. For numerical answers, this includes both averages and ranges; for yes/no questions, this includes percentages of how institutions answered. Finally, we have included the 2021-22 survey questions on our website for context.

126 BUCS member institutions completed at least some portion of the survey. Throughout this report, we have noted how many institutions answered the questions to which we refer.

We would like to express our gratitude to the institutions who took part in the 2021-22 survey, especially those who completed all the questions. Without the data, we would not be able to produce the information and insights in the following pages. We encourage all BUCS members to fill out as much of the survey as possible in the next iteration so that we can report on an even fuller dataset.

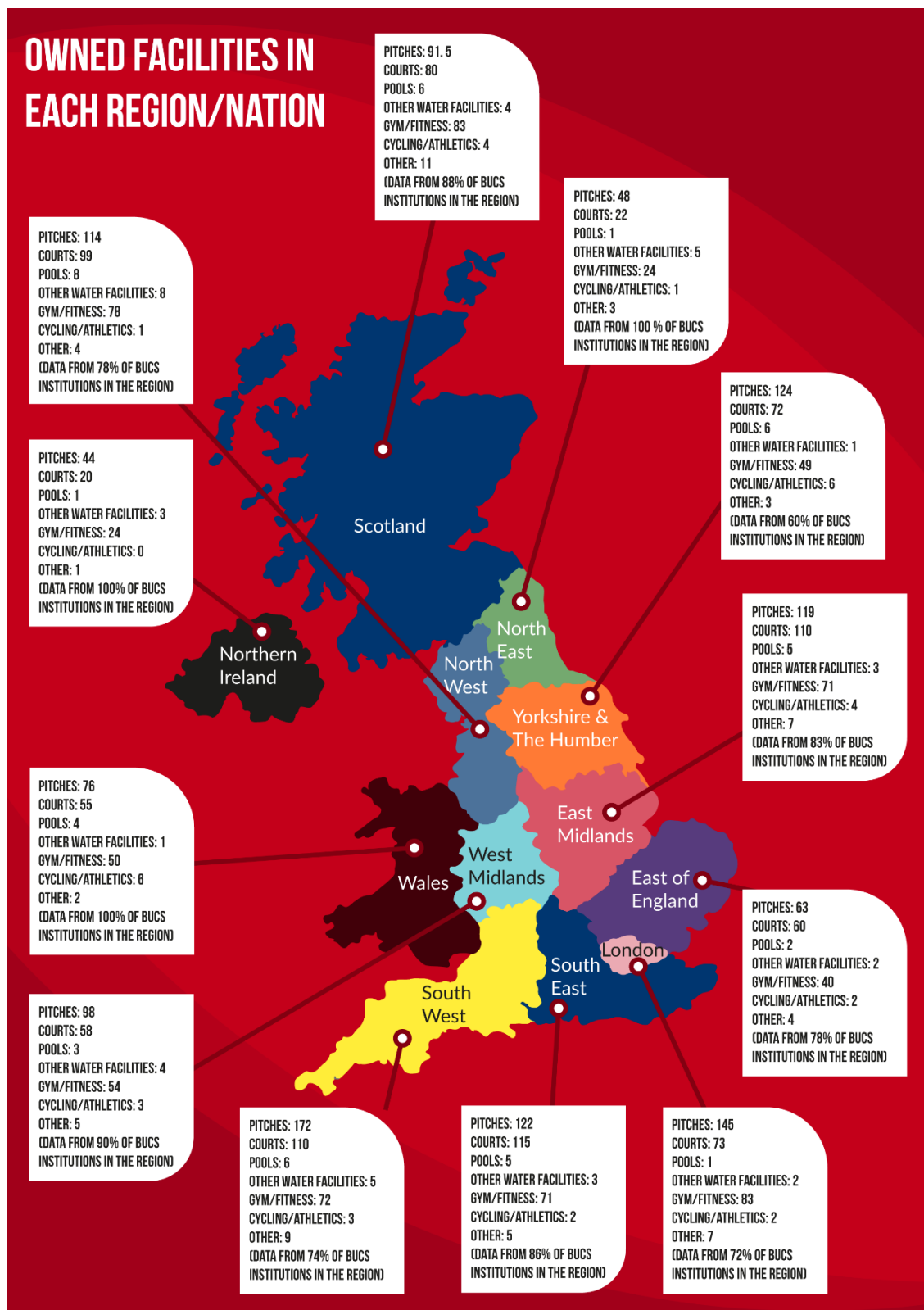
CONTRIBUTING TO THE WIDER SPORTING ECOSYSTEM.

Higher education sport and physical activity contributes a huge amount to the wider UK sport sector, including but not limited to facilities, workforce, sport and physical activity provision, volunteers, and athlete support. The 126 institutions who participated in the 2021-22 survey provide sport and physical opportunities for 2.3 million students every year, as well as institution staff and, often, the UK public. Higher education provides opportunities for students to take part in a wide array of physical activity and sport, ranging from wellbeing opportunities to performance athlete scholarships to sport volunteering programmes. The infographic below demonstrates just some of the contribution to the sport sector.



FACILITY CONTRIBUTION AT REGIONAL/HOME NATIONS LEVEL

Higher education institutions across the UK provide a huge number of sports facilities. The map below breaks down these contributions by each region and Home Nation.



WHAT MAKES BUCS TOP 20 INSTITUTIONS UNIQUE?

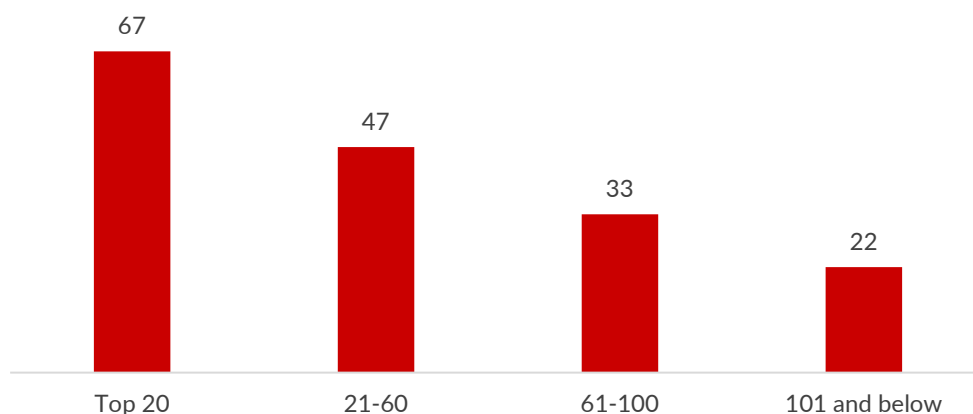
Higher education institutions recognise that engagement in sport and physical activity has a positive impact on a range of student outcomes, including recruitment, retention, attainment, graduate outcomes, employability and wellbeing. All are areas that appear consistently in higher education institutions' organisational strategies. We know that competitive sport in particular can be a significant pull when students are selecting their institution of study, and the BUCS rankings can be a proxy that students use when making their choice. We have therefore pulled together this analysis of what qualities make BUCS top 20 institutions stand apart from others.

We selected the specific BUCS points rank bandings in this analysis (top 20, 21-60, 61-100 and 101 and below) based on the number of institutions that fell into each group, ensuring there were comparable sample sizes in each group. Historically, Russell Group and large institutions have been overrepresented in the BUCS top 20. While this is useful to note for context, in our analysis we have looked at the sport-specific commonalities amongst BUCS top 20 institutions.

WIDER SPORTS OFFERING

Institutions in the BUCS top 20 tend to offer a wider range of sports than institutions lower down in the rankings. Across the dataset, there is a reasonably strong negative correlation (-0.72) between the number of sports clubs at an institution¹ and BUCS ranking: the higher the BUCS ranking of an institution, the more sports clubs they have. As demonstrated by the graph below, the average number of sports offered by an institution falls linearly as an institution's ranking falls.

AVERAGE NUMBER OF SPORTS OFFERED BY AN INSTITUTION



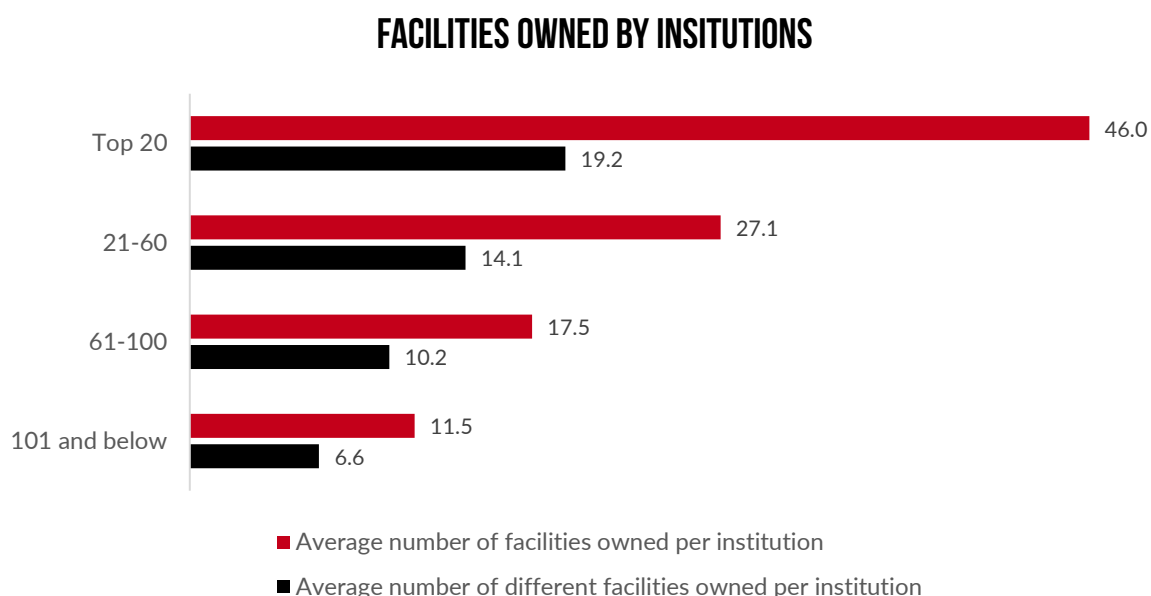
¹ This is defined as the number of different sports offered by student-run sports clubs/societies, where men's and women's sports are treated as separate clubs.

This correlation makes sense for a few reasons. First, the more sports an institution is involved in at a high level, the more BUCS points they can earn. Second, it is likely that students competing in high level sport before entering higher education will be attracted to institutions with a wide sport offering. When they join an institution with a high BUCS ranking, they are continuing a virtuous cycle of wide sports offerings attracting more talent, which in turn boosts the quality of the sports programme and, likely, the BUCS ranking, which then often attracts more funding – thus allowing the sports programme to get better and better.

Numerous factors will determine whether an institution can put on a wide range of sports, including number of facilities and their availability, demand from students, and financial investment. We will look at these factors in the following sections.

MORE AND WIDER RANGING FACILITIES

Maintaining suitable and sufficient sports facilities is a consistent challenge for higher education institutions. Owning or hiring the necessary facilities for training and competitions is crucial to keeping students participating and allowing them to be able to perform at their best. We found that institutions in the BUCS top 20 tend to have an advantage in this area. They own more facilities, as well as a larger variety of facilities, as displayed in the graph below. Both numbers decrease linearly with the BUCS ranking bands. This trend generally holds true for hired facilities as well.



Looking more closely at the variety of facilities owned, BUCS top 20 institutions also have an advantage here. Of the facilities reported upon within the survey, BUCS top 20 institutions held the

highest average number of facilities in each facility category (pitches, courts, swimming pools, other water-based facilities, gym/fitness-based facilities, cycling/athletics facilities and other facilities). The average number of owned facilities in each category reduces in line with BUCS rankings, which again emphasises the importance of the number and range of facilities present at an institution.

BUCS RANKING	PITCHES	COURTS	SWIMMING POOLS	OTHER WATER BASED FACILITIES	GYM/FITNESS BASED FACILITIES	CYCLING/ ATHLETICS FACILITIES	OTHER
TOP 20	19.0	15.4	0.7	0.8	8.1	0.9	1.2
21-60	11.9	7.8	0.6	0.3	5.8	0.2	0.6
61-100	6.5	4.9	0.3	0.2	5.1	0.1	0.4
101 AND BELOW	4.5	2.7	0.0	0.2	3.9	0.0	0.1

PRESENCE OF A STRATEGY FOR SPORT AND PHYSICAL ACTIVITY

BUCS top 20 institutions were more likely to have a strategy in place for sport and physical activity than other institutions. 95% of the top 20 BUCS institutions have one, with a minimal difference when looking at institutions ranked 21-60 (90%). There is then a drop to 59% for institutions ranked 61-100 and 47% for institutions ranked 101 and below. Overall, having a specific strategy for sport and/or physical activity can help demonstrate the value an institution puts on this area as well as set out how to achieve strategic objectives.

FOCUS ON COMPETITIVE SPORT AND CULTURE

Sport departments at different institutions have a wide range of strategic objectives that can vary based on institution size or type, student demographics and student needs. The word cloud below demonstrates the most commonly identified strategic objectives across institutions.



We found that top 20 BUCS institutions were more likely than others to mention competitive (BUCS) sport and culture, and less likely to list participation, facilities and graduate outcomes/employability. Without further research, it is difficult to know why these differences exist.

INVESTMENT IN SPORT AND FACILITIES

Previously, we outlined the value of owning a greater number and wider-ranging set of facilities. It is unlikely that institutions would be able to achieve both these things without significant investment. Again, we see that top 20 BUCS institutions stand out when looking at facilities investment. When combining the total investment from the previous five years in sports facilities and the planned investment in sports facilities in the coming five years, the top 20 institutions reported the highest average spend per capita.²

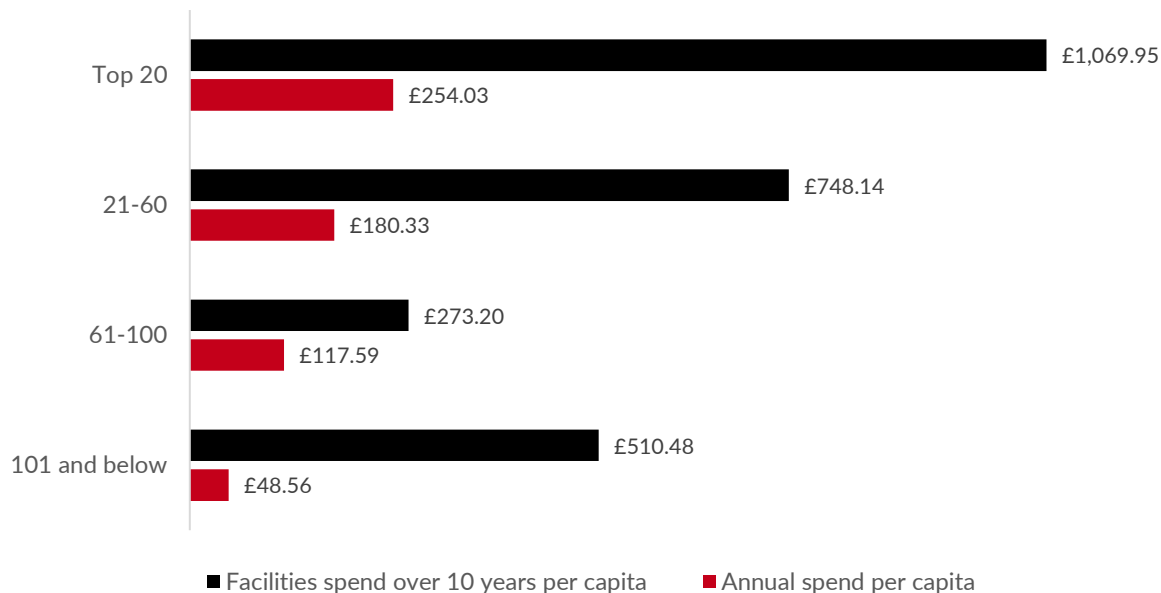
There are several reasons why investment in facilities could be correlated with a BUCS top 20 ranking. For example, a higher standard of owned facilities will help attract students to the institution, meaning a larger pool of student athletes, with potentially differing skillsets, to choose from when selecting sports teams. Additionally, more investment is likely to lead to having a wider range of facilities and more facility space, meaning an institution can enter more teams into the BUCS competition structure.

Coupled with the investment in facilities, the BUCS top 20 institutions also have the highest average annual spend on sport per capita. This speaks to the investment that is put into aspects of a sport offer, such as staffing and consumables, which can lead to amassing more BUCS points. As you can see from

² Total 10 year spend has been divided by student population to prevent the size of an institution from skewing the data.

the graph below, both the investment spend on facilities per capita, and the annual spend on sport per capita, fall in a linear fashion as you go down through the BUCS rankings.

INVESTMENT IN SPORT AND FACILITIES

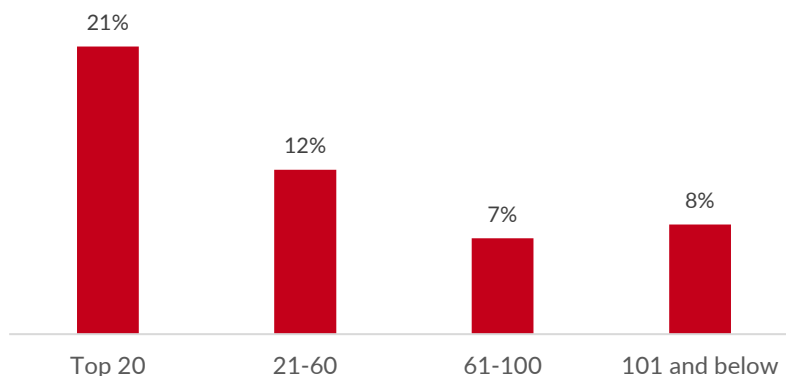


N.B. There is one outlier in the 101+ group. When the outlier is removed, the average per capita facilities spend falls to £51.13, placing it back in line with the downward trend.

SPORTS CLUB MEMBERSHIP

The BUCS top 20 institutions have a noticeably higher percentage of student sports club memberships (21%) when compared to institutions ranked below the top 20.

STUDENT SPORTS CLUB MEMBERSHIP (AS A PERCENTAGE OF STUDENT POPULATION)



Having an increased number of students sports club memberships is likely influenced by variables such as available facility space and the number of the clubs offered at an institution. Having more students as sports club members will allow institutions to enter more teams and athletes into the BUCS competition structure, therefore increasing the possibility of accumulating more BUCS points – another virtuous cycle that feeds BUCS top 20 institutions' success.

INTRAMURAL SPORT OFFERING

One might hypothesise that the BUCS top 20 institutions would have fewer opportunities for intramural sport because they are focused on competitive sport, but the opposite is true. These institutions are more likely to offer intramural sports: all institutions within the top 20 offer intramural sport, while this fell to 79% and 78% respectively for institution ranked 21-60 and institutions ranked 61-100. This then fell considerably for institutions ranked 101 and below, with 39% reporting that they offer intramural sport. The data does not point to reasons for this difference, but it might be due to lower demand from students or less capacity in facilities and staffing to accommodate intramural sport at these institutions.

There are numerous benefits relating to intramural sport in its own right, such as mental and physical wellbeing, social inclusion and sense of belonging. But offering intramural sport also has a key benefit for competitive sport: it can provide a pathway into BUCS sport. Intramural sport can provide the opportunity to students who might not have played a particular sport before to participate, find out whether they have a natural ability and practise skills before moving up to a more competitive level within the BUCS structure. This could also be a pathway for students who do not have the confidence to put themselves forward straight away to be part of a BUCS competitive team. Intramural sport provision would help them increase their confidence through participation and make the step to the BUCS competition sport structure when they feel ready.

INFORMATION THAT FALLS OUTSIDE OF THE BUCS TOP 20 ANALYSIS

In our analysis of the data, we identified two important insights that fall outside of the BUCS top 20 analysis framework. The first was around how many institutional strategies featured sport and/or physical activity, and the second was about disabled, adaptive and accessible sports.

Sport and/or physical activity do not feature in a majority of institutional strategies.

Earlier in the report, we discussed the fact that most institutions have a strategy in place for sport and physical activity, and this is increasingly true the higher up the BUCS ranking an institution sits. But we also found that, regardless of BUCS ranking, institutions were unlikely to feature sport and/or physical activity in their organisational strategy. Only 32% of the 89 institutions who responded to this survey question said their institution's strategy mentioned sport and/or physical activity. Given how powerful sport and physical activity can be for student wellbeing and a range of student experiences and outcomes, this is unfortunately low. BUCS will continue to support members to advocate to the leadership teams in their institutions for more support for sport and physical activity at the highest levels.

Provision of disabled, adaptive, and accessible sports is not sufficient.

Providing sports and physical activity opportunities for students with disabilities is a crucial element of higher education sports inclusion. However, we found that only half of the 125 institutions who answered this question were offering *any* disabled, adaptive or accessible sports provisions. Of the 50% that were offering something, the average number of sports per institution was still low at 2.8.

As demonstrated in the table below, the BUCS top 20 institutions were the most likely to offer these types of sports and to offer the most per institution, demonstrating that inclusivity can positively correlate with a higher BUCS ranking.

BUCS POINTS RANKING	PERCENTAGE OF INSTITUTIONS OFFERING AT LEAST ONE DISABLED/ADAPTIVE SPORT	AVERAGE NUMBER OF DISABLED/ADAPTIVE SPORTS OFFERED
TOP 20	90.0%	4.6
21-60	61.5%	1.8
61-100	25.6%	1.9
101 AND BELOW	36.7%	2.6

TRENDS OVER TIME

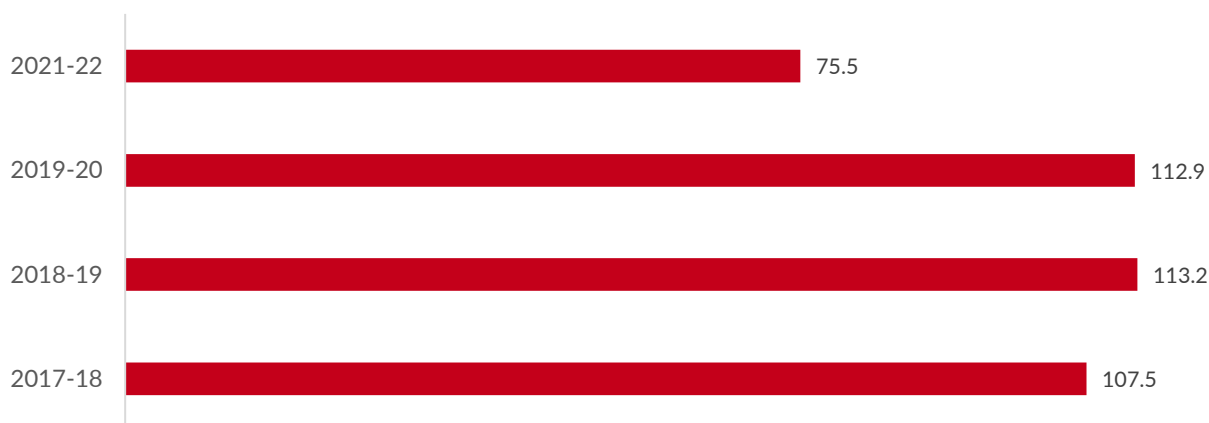
BUCS started collaborating with Complete University Guide to carry out this survey in 2017-18. There have therefore been surveys across four academic years: 2017-18, 2018-19, 2019-20 and 2021-22 (2020-21 was not carried out due to COVID-19).³ Below we highlight some noticeable changes over time. In some cases, we have hypothesised about why we are seeing these changes, but without carrying out further research, it is difficult to pinpoint the explanations that lie behind the data.

The number of institutions offering intramural sports programmes and the size of the offering have decreased over time.

Across the four surveys, we saw a steady decrease in the number of institutions offering intramural sport. In 2017-18, 82% of institutions surveyed provided intramural sports programmes; by 2021-22, the figure had dropped by 10 percentage points to 72%.

Furthermore, the average intramural offering within institutions has also shrunk. This includes the average number of intramural sports offered per institution and the average number of teams. The major drop-off point followed the pandemic period. Before that, the average institution offering was stable. The number of sports offered at an institution was, on average, 6.7 until the year following the pandemic; it then dropped to 5.9. The average number of intramural teams per institution also dropped considerably in the year following the pandemic, as displayed in the graph below.

AVERAGE NUMBER OF INTRAMURAL TEAMS PER INSTITUTION



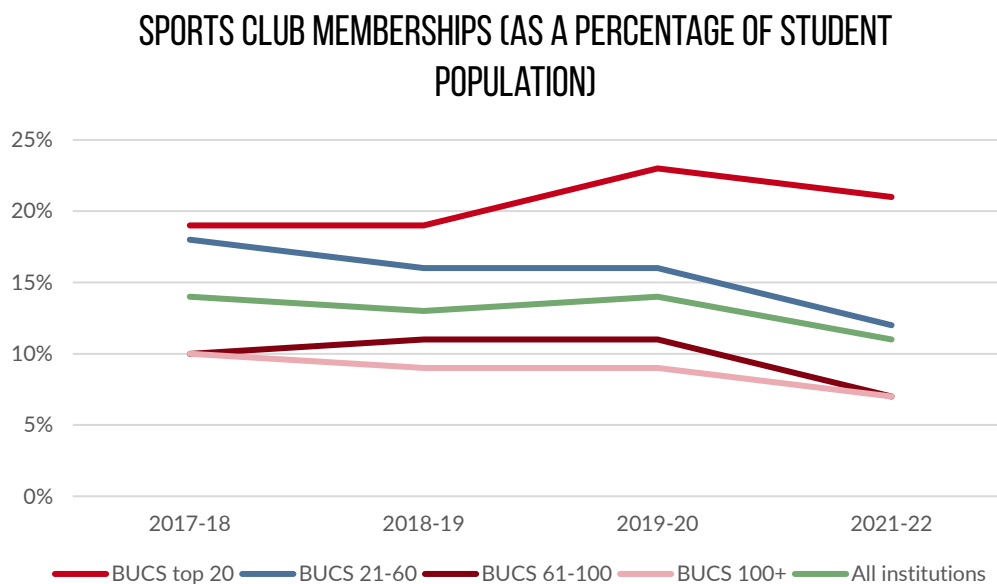
Based on the cost-of-living research BUCS carried out in spring 2023, institutions were increasingly relying on intramural offers that did not involve expensive travel costs to help students stay active. We

³ Each survey has had roughly comparable completion rates: in 2017/18, 129 institutions completed it; in 2018/19, 128 institutions completed it; in 2019/20, 133 institutions completed it; and in 2021/22, 126 institutions completed it.

would therefore expect these intramural numbers to bounce back in the next CUG survey, which will cover the 2022-23 academic year. We will report on this in the next annual report.

Sports club memberships are down across most institutions.

The pandemic had a negative impact on sports club membership. Sports club membership as a percentage of overall student population was steady at 13% to 14% prior to the pandemic; in 2021-22, however, that number fell to 11%. While institutions across the BUCS rankings were affected equally by the pandemic, a pre-pandemic bump in student sports club memberships in the BUCS top 20 means that the gap between the BUCS top 20 and all other institutions has grown. The shift can be seen in the graph below. The green line in the middle of the graph shows the trajectory of all institutions, while the other lines show the trajectory of institutions based on their ranking. While the gap between BUCS top 20 sports club memberships and the average across institutions was five percentage points in 2017-18, it has grown over time to 10 percentage points.



The graph clearly demonstrates that institutions of all BUCS rankings saw a downturn in sports club memberships during the pandemic. The BUCS Cost-of-Living Research suggests that the ‘Cost-of-Living Crisis’ might have slowed down the post-pandemic recovery of higher education sport because students struggled to afford memberships and other elements of sport. In next year’s report, we will look at how sports club membership numbers changed in 2022-23.

Student sports volunteering numbers are on the rise.

Around two-thirds of institutions who completed the survey have sports volunteering programmes in place; in 2021-22, this number stood at 67%. This has not changed much across the four surveys. However, the average number of participants per volunteer programme has risen by 11% since 2017-18. This is a surprising and hopeful finding against a backdrop of falling sports volunteers overall.

According to the 2021-22 Sport England Active Lives survey (the most comparable data source we have), over a similar period, the percentage of English adults who participated in sports volunteering dropped.⁴ Students in higher education are therefore playing an increasingly important role in sports volunteering.

The BUCS Cost-of-Living Research earlier this year suggested that some institutions struggled to find volunteers because so many students had to work. This might be reflected in the next survey, which will cover the 2022-23 academic year. We will report on volunteering numbers again if we see a drop in next year's figures.

Fitness class offerings and capacity are declining following the pandemic.

Prior to the COVID-19 pandemic, the average number of fitness classes offered per week at each institution was relatively stable (between 43 and 46 classes offered at each institution). Following the pandemic, however, this number dropped sharply to 33 classes per week. As a result, average fitness class capacity per institution has followed a similar pattern. From 2017-18 to 2021-22, institutions saw an average decrease in fitness class capacity of over one-third (36%), a shockingly high number.

Looking at the broader sports landscape, this decrease is likely a product of both supply and demand. Sport England found in their latest Active Lives survey that the number of English adults attending activities such as fitness classes remains low compared to pre-pandemic levels.⁵ On the supply side, [EMD UK](#) (the national governing body for group exercise) has found that the group exercise workforce is struggling to maintain profitable employment against a backdrop of years of stagnant pay and rising costs. Over half of instructors who EMD UK surveyed (54%) said they were considering leaving the industry.⁶

We spoke to several BUCS member institutions about the decrease in fitness class capacity and understand that they have felt the impact unevenly. Some have seen fitness class demand increase and have responded by putting on more classes, while others have experienced the opposite. It's therefore likely that the average capacity loss of 36% is being felt more deeply by some institutions.

⁴ Sport England, [Active Lives Survey November 2021-22](#), April 2023.

⁵ Sport England, [Active Lives Survey November 2021-22](#), April 2023.

⁶ EMD UK, [How much has the cost of living affected you? \(workforce survey\)](#), 2023.

CONCLUSION

The data from the Complete University Guide reveals just how much higher education sport contributes to the wider sport sector. These contributions include facilities, sport and fitness opportunities, support for student athletes, and volunteer and workforce development amongst many others, as demonstrated in the infographics at the start of this report.

The data also helps us better understand the factors that contribute to high-ranking sports programmes in higher education institutions. In our analysis, we found that institutions ranked in the BUCS top 20 tended to have a wider sports offering, provide more numerous and varied facilities, focus more on competition and sport culture, invest more in sports and facilities, and, perhaps because of these things, higher sports club memberships per capita. In future analysis, we will also aim to understand the commonalities of institutions with high student membership participation levels, regardless of the institution's BUCS ranking.

Finally, because we have collected data across multiple years, we have been able to identify trends in the post-pandemic period, including a fall in intramural sport provision, a decrease in student sports club memberships, a surprising increase in student sport volunteering numbers, and a decrease in provision and capacity of fitness classes. In the next annual report, we will review these trends to see what, if anything, has changed.

Thank you to all of the BUCS members who completed this survey. Without the data, we would simply not be able to provide this insight. We encourage all BUCS members to take part in this survey in coming years; the more institutions who participate, the more robust and complete our dataset can be.