



Australian Government
Australian Sports Commission

PARENTS
MARKET
SEGMENTATION

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National Sport Research
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PARENTS PLAY A SIGNIFICANT ROLE IN DECIDING WHAT SPORT THEIR CHILD PLAYS (IF ANY) AND HOW THEY PLAY. WHAT INFLUENCES PARENTS' DECISIONS AND HOW DO WE, THE SPORT SECTOR, AID THEIR DECISION MAKING?

According to the 2011 Census almost 3.6 million Australians are aged from 5-17 years. Virtually all parents of these children actively encourage them to participate in activities of some sort however sport is one of a myriad of activities parents can choose from.

The Australian Sports Commission (ASC) identified a need to undertake research among Australian parents of children aged 5-17 to help sports capitalise on the significant role parents play in choosing activities for their children.

The overall aim of the Market Segmentation for Parents (the study) was to explore parents' attitudes and behaviours towards sports and sport clubs in order to better understand the decision making process that parents go through in selecting sporting activities or involvement in sport clubs for their children and/or themselves.

The study is the latest instalment in an integrated programme of evidence-based research led by the ASC. In 2013 the ASC identified segments within the community with the greatest potential for increasing or retaining participants in club based sport (*Market Segmentation for Sport Participation*). The research developed a needs-based market segmentation model of Australian sporting participants and non-participants and identified segments of the community (both adults and children) with the greatest potential to acquire and retain participants in club based sports. In 2014, the ASC launched additional segmentation studies for people with disability and volunteers.

Market segmentation involves dividing a market into groups of people or consumers with similar needs, attitudes and behaviours.



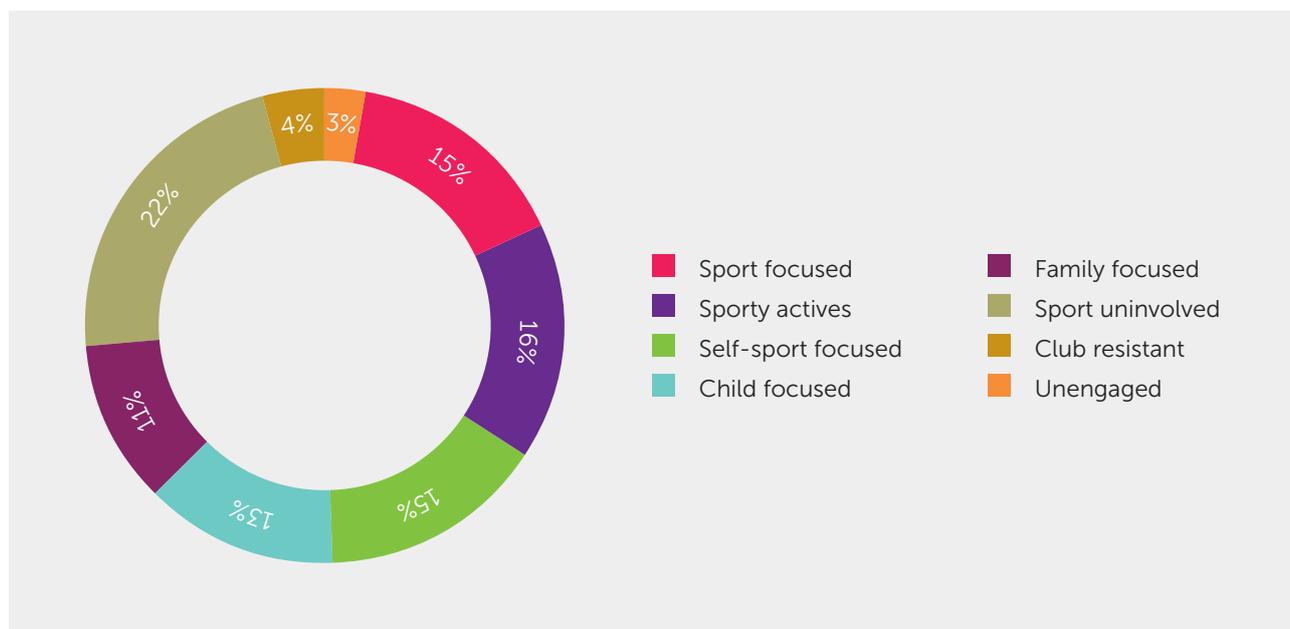
The ASC commissioned Latitude Insights to undertake this research.

HOW CAN SPORT USE THE MARKET SEGMENTATION FOR PARENTS?

The parent study complements evidence from the children's *Market Segmentation for Sport Participation* study, and when considered in conjunction provides a holistic understanding of the drivers for both child and adult to help sports create new and refine existing strategies that better target recruitment and retention of children in club sport.

The segmentation across the Australian population of parents with children aged 5-17 resulted in eight segments based on differences in parents' participation, attitudes and behaviour towards sport and organised sport or physical activity for them and their children:

- *Sport focused, Sporty actives, Self-sport focused, Child focused, Family focused, Sport uninvolved, Club resistant, and the Unengaged.*



The research revealed there is little potential to recruit parents into sport through their children's activities. While parents participate in sport with their children, very few started playing a sport because their child was playing (4%). This suggests that where sport is played together, it is the parent driving the choice of activity. Relatively few parents reported that they would take up a sport that their child was playing (11%). Given this finding, the *Market Segmentation for Parents* study should primarily be used as a resource for the targeting of children's participation.

To target adult participation, sports should continue to use the 2013 *Market Segmentation for Sport Participation Adults* study as their main resource.

SEGMENT OPPORTUNITIES FOR RETENTION AND ACQUISITION

Overall, without any changes in perceptions of and attitudes towards sport clubs, current participation is the best predictor of future participation. This suggests that retention of those parental segments who have children already participating in club sport should be the primary focus.

These segments are:

➤ *Sport focused, Sporty actives, Child focused, Family focused*

Of these four, the 'Family focused' segment offers the biggest challenge for retention because only a relatively smaller percentage (14%) of their children are currently in club sport.

However, there are also some opportunities to recruit children into club sport or other types of organised sport/physical activity through their parents. Amongst parents with a child not currently in club sport, nearly one in four (23%) are interested in having their child participate in club sport in the future. Significantly more (34%) are interested in having their child participate in organised sport/physical activity in the future. Why couldn't your sport be that physical activity?

- ① For all segments, a key motivating factor is offering free trials which can address concerns some parents have about committing (time and money) to a sport club before being sure that it will suit them and their children.
- ② '**Sport focused**' are significantly more likely to be motivated by access to good coaching/training, reflecting the importance they place on skill building for their children. Whereas '**Sporty actives**' are so highly engaged with sport and physical activity that they are significantly more likely to be motivated by a wide range of factors.
- ③ The '**Family focused**' segment, whose priorities are activities that fit in with family time, show potential for acquisition via flexible, family friendly offers and clear information about what commitment is required.
- ④ As the name suggests, the '**Child focused**' segment is strongly driven by the child. Parents in this segment are motivated to have a child join club sport if their child will primarily enjoy it and secondly will learn teamwork and responsibility.
- ⑤ While a low involvement segment, results indicate that the '**Club resistant**' segment could be encouraged by more social/less competitive activities and less pressure for parents to get involved in fund raising, volunteering, etc.
- ⑥ Reflecting their lower levels of engagement and involvement in sport and physical activity for their children, '**Sport uninvolved**' and '**Unengaged**' parent segments are motivated by significantly fewer factors overall and acquisition is less likely than other segments.
- ⑦ Finally, the '**Self-sport focused**' segment, while identifying with many of the benefits of club sport for their children, prefer to make time for their own sporting and other activities over their children's.

Segment		Retention	Acquisition
Sport Focused	Relatively active and almost all have children in club sport. Strongly believe that children should be physically active. Identify with the benefits clubs offer and are the driver of their children's participation.	✓✓	
Family Focused	Appreciate the benefits of physical activity, but have concerns with commitment and flexibility. Prefer their children to do activity that does not detract from "family time". Likely to defer to their children as drivers of participation.	✓	
Sporty Actives	Very physically active in a range of different organised sport and activities. Few engage in club sport personally but the majority have children in club sport. Place importance on physical activity and this is the driver for their children participating.	✓✓	✓✓
Child Focused	Identify many of the positives around club sport, while not seeing many negatives. Most important is that their child enjoys the sport/activity and the child tends to drive the decision to participate. Need an understanding of what commitment is required.	✓✓	✓✓
Self Sport Focused	One of the most physically active segments. Many involved in club sport but most undertake their organised sport through other avenues. Making time for their own sport/activities takes priority over their children's.		✓
Sport Uninvolved	Relatively inactive compared to other segments. Have no outright negative attitudes towards sport, but do not encourage their children to do any organised activity outside of school, and are cautious of the need for any level of personal commitment.		✓
Club Resistant	Do limited physical activity and children have low levels of involvement in club sport. Strongly believe that their children do not need to be involved in organised sport or club sport to be physically active. Identify a number of barriers to sport clubs.		
Unengaged	Quite inactive, with few playing club sport themselves. While they identify benefits of physical activity, participation in sport clubs and other activities is not an active choice. Very uninvolved in their children's lives.		

DRIVERS IN CHOOSING CHILDREN'S ACTIVITIES

- Parents' positive attitude to club sport is a key driver of their children's involvement. Families with children involved in club sport are significantly more likely to see the benefits of club sport.
- The vast majority of parents agree that physical activity is good for their child. Having inactive children may reflect negatively on them as parents which can be a significant driver. Because of this some parents feel significant pressure to ensure their children are participating in some type of sport or physical activity.
- Safety concerns are also a key component of decision making for parents. For example, developing a life skill such as learning to swim can be a key driver for wanting their child to undertake this particular activity.

Overall, the choice to participate in physical activity is driven by both parents and children:

Parents will encourage an activity for reasons to do with:

- Safety
- Physical or psychological difficulties
- Status or identity
- Future opportunities

Children will ask to do an activity mostly due to a direct stimulus from:

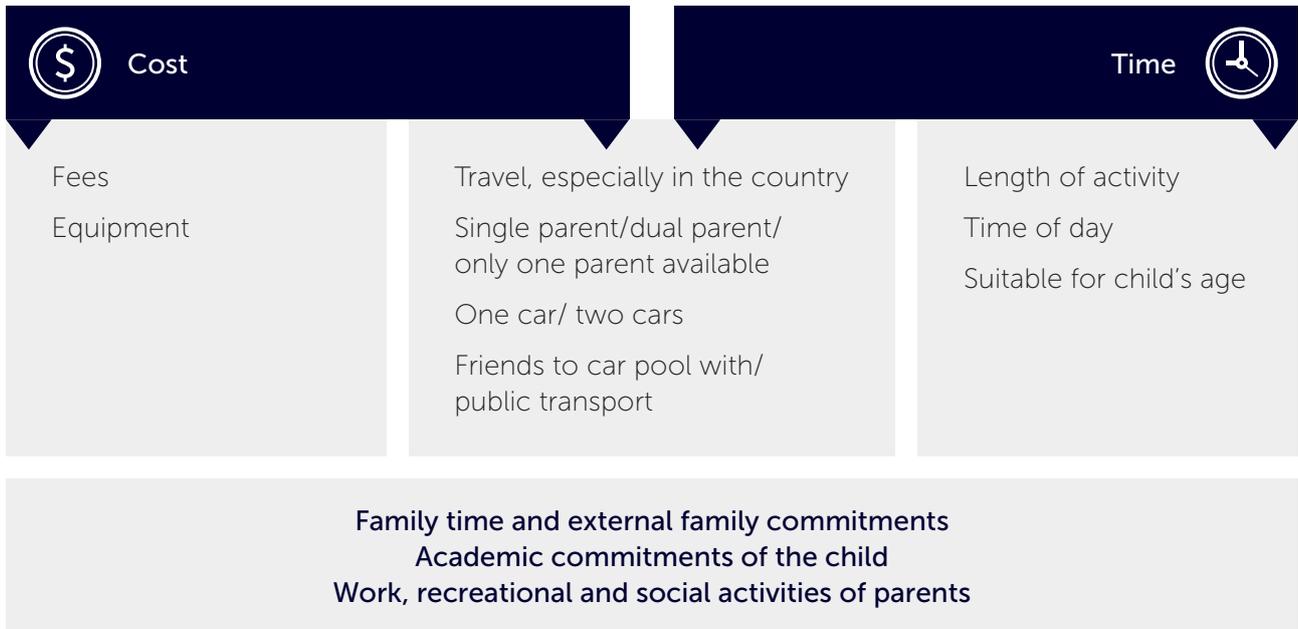
- Peers
- Parents' interest
- Role models
- Opportunity for trial

Ensuring children's enjoyment as well as building children's confidence and a sense of achievement are key factors for parents feeling satisfied with their children's involvement in an activity. This has critical impact on both acquisition and retention.

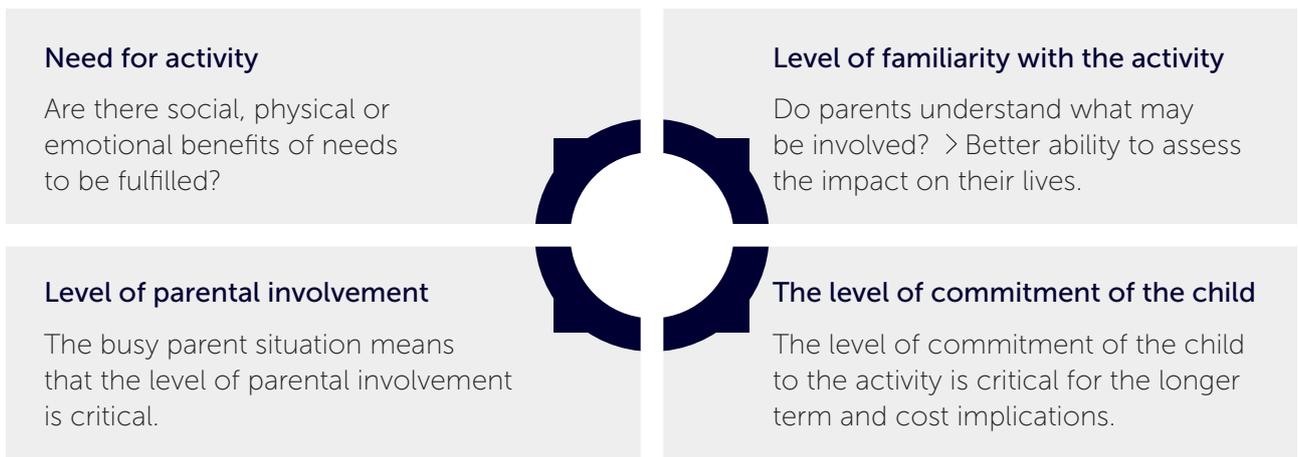
BARRIERS IN CHOOSING CHILDREN'S ACTIVITIES

- > Parents' negative attitude to club sport is a key barrier to their children's involvement.
- > As well as being a driver, safety is also a barrier. Parents may not allow their children to play some sports, such as the various high physical contact sports, due to the perceived potential risk of injury.

Overall, cost and time form the basis of parents' decision making:

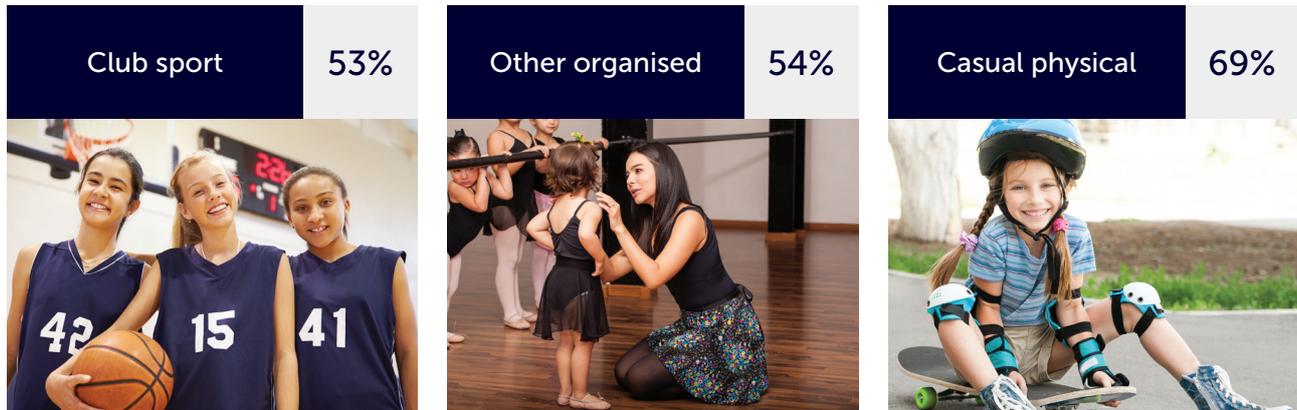


Despite this, parents will find the time and money to accommodate their children's wishes where they can. But other factors also impact parents' decision making:



▣ 'CLUB SPORT' VERSUS 'OTHER ORGANISED SPORT'

Half of families (53%) have at least one child involved in club sport.



The qualitative research identified that most parents think of a more traditional club sport offer when they think of sports that are played within clubs:

- Structured competition over the course of a season (2-3 months), played on weekends; and
- Training occurring through the week.

This customary view of sport clubs is often quite different to the way parents view other organised sport and activities outside of the traditional club offer.

However, both parents and children identified a greater range and greater number of benefits in relation to club sport than organised sport.

Club sport, as a subset of organised physical activity, was seen to benefit children in a number of additional ways:

Any activity:

- get kids out of the house
- opportunity to learn new skills and develop confidence

Organised sport:

- occurs at specific times and can be planned into busy family schedules
- gets them out in the fresh air exercising
- develops physical and interpersonal skills and expands social network

Club sport has the potential to benefit children in unique ways:

- an organised structure
- deliver instruction and feedback through coaching and training (building skills, finding positive role models)
- competitive (benefits to learning to win and lose, an opportunity for children – particularly if less academic – to excel)
- working with others (teamwork, cooperation, social skills)
- strong sense of belonging
- require commitment

These benefits however can often be offset by perceptions of sport clubs being:

- > 'Win at all costs', favouring strong players and leaving weaker players out;
- > Exclusive and discriminating;
- > Highly disorganised, chaotic;
- > Bullying and poor management skills;
- > Requiring large commitments and being inflexible – i.e. not allowing for other priorities.
 - This creates disillusionment and ultimately attrition.
 - Parents form negative views towards all clubs.

Other organised physical activities are seen to have a different offer, and offer different advantages:

Greater flexibility and less commitment	Specific advantages
<ul style="list-style-type: none">• Often more of an individual focus (lessons, individual sports)• While still at a set time and place, usually does not matter if children can make it every time or not• Pay as you go options, shorter length of time to pay for limits financial commitment	<ul style="list-style-type: none">• Often perceived as less expensive than clubs (except dancing)• Usually focused on the individual learning a skill• Enables a trial period• Still social (can be done with friends)• Parental involvement is often considerably less (paying for a private operator to handle everything, ability to just dump and run)
<p>Overall, child not seen as letting others down if they do not turn up!</p>	

Overall, when measured, parents seem to play a bigger role in the initial decision for a child to participate in club sport when compared to other organised sport. That said, many child driven reasons are also mentioned significantly more often in relation to joining sport clubs compared to other organised sport. **This illustrates the greater range and greater number of benefits both parents and children identify in relation to club sport.**

Importantly, for both club and other organised sport, the initial prompt to have their child join often came from the child trying the sport / activity at school. **This indicates a clear opportunity for the sport sector to increase interest and involvement in clubs through exposure in schools.**

Word of mouth from other parents was the number two prompt to have a child join a sport club. This was also important for other organised sport, albeit significantly less, and **suggests the social part of being part of a sport club is important.**

HOW TO COMMUNICATE WITH PARENTS AND CHILDREN

- Communication channels for all segments are similar.
- Information sources should always be local, regardless of the parent segment.
- Parents and children are influenced by specific, tangible information delivered via local sources such as the local newspapers and local directories. Parents also respond to school newsletters and flyers, the suggestions of other parents, banners seen on local fields and ads for local trials or family days. Flyers that come home in the school bag or mentions in school newsletters are also highly effective at promoting sporting opportunities.
- Children are most influenced by their social networks with friends the biggest influence on encouraging them to participate.

OTHER KEY INSIGHTS FROM THIS RESEARCH

- Consider a number of key strategies to both retain existing members and overcome the identified barriers to club participation. These include:
 - An enforced and clearly communicated code of conduct for parents;
 - Free trial products for children and families and pay as you go for trial products to address the key issues of commitment, and help address issues of both time and cost commitment. An alternative is seasons of shorter duration;
 - More social / less competitive offering;
 - Consistent game times / locations, coupled with options to participate after school for parents who do not want to commit to weekends and facilitation of parental networks to assist with the logistics of travel;
 - Introductory information packs;
 - Modified equipment (where relevant) and alternative scoring systems; and
 - Ensuring effective coaching through mandatory training that includes both technical sport skills and the 'softer skills' to engage and nurture children.
- Recognise that many children have an active role in choosing their sport or activity and capitalise on the methods that prompt their decision making, such as :
 - Trial days at school and sport delivery through school and after school care or holiday programs;
 - Leveraging friends' involvement; and
 - Exposure to role models.
- The qualitative findings suggest that there is a point where the choice to participate in sport becomes influenced by other external factors that have a strong impact on the child's participation in sport. For example, at around 14 years of age, children want to make their own decisions, with socialising and 'doing what is cool' taking over, while the parents' preferences for the child is no longer as influential. Further, external factors such as school or part time work can impact on choices.

WHERE TO FROM HERE?



More information can be found at www.researchinsport.com.au



For our sport sector partners, a copy of the full *Market Segmentation for Parents Report* can be obtained by contacting asc_research@ausport.gov.au

