



Australian Government
Australian Sport Commission

Market Segmentation Pilots

CASE STUDY 4 – SPACE RACING

MARKET SEGMENTATION FOR SPORT PARTICIPATION



INTRODUCTION

Fewer Australians are participating in traditional, club-based sport. However people are increasingly choosing to play and be active in more non-organised and social forms of sport participation.

The Exercise Recreation and Sport Survey (ERASS) data show that between 2001 and 2010 there was a gradual but consistent decline in the number of adults participating in organised sport in Australia. In 2001 adult participation in sport on a weekly basis was approximately 33% of the adult population. This fell to 30% in 2010 and is forecast to decline further to around 28% by 2022. A similar decline has occurred in children's participation. Participation in non-organised sport is not only bigger but growing; Australian Bureau of Statistics research has shown non-organised participation in sport grow over a similar period as the ERASS data, from 50% to 54%.

Recent research has uncovered many of the underlying reasons for the decline in traditional, organised forms of sport. The Australian Sports Commission (ASC) *Market Segmentation for Sport Participation* research found that Australians are increasingly becoming time-poor and, for many, more restricted in terms of budget. In addition to changing demographics (ageing population and changing migration patterns), there is much greater competition from other recreational activities than ever before and, as a result, families are faced with a wide range of choice to spend their discretionary time and money.


Declining participation rates in traditional, organised sports demonstrate that they have generally not adapted to this changing environment. To reverse the trend sports must adapt their products to suit the needs of the modern Australian consumer.

The ASC's *Market Segmentation* research specifically shows that a considerable number of people now want to play sport in ways that are different to the traditional club offering. Much of what is currently delivered focuses on competition and performance within rigid schedules. Clubs are viewed by many people that are not members as being exclusive or 'elitist'; there is a perception that they are only interested in more competent participants that are better performers.

The research also identified a number of market segments that could be targeted in certain ways to increase the likelihood of attracting and / or retaining people in organised sport. The research describes the motivators and barriers to sport participation for each segment, identifying possible features for sports to include in product offers to increase participation.

In summary, there is a need for more flexible sport participation offerings that focus on enjoyment and socialising. More people are now looking to access facilities and programs at times that suit them and in a less structured environment that is focussed on what they, as the customer, want rather than what a typical traditional club is willing or capable of providing.

Traditional club-based sport does continue to have a role to play because, as the ASC's *Market Segmentation* research showed, over 60% of the people currently playing sport in traditional clubs really value the traditional approach. However to get more people playing sport (and retain more of the ones that are in clubs now) other approaches, formats and schedules need to be offered to meet the changing demands of consumers.



Further information about the market segmentation research is available at –

https://secure.ausport.gov.au/clearinghouse/research/national_sport_research/market_segmentation_adults

https://secure.ausport.gov.au/clearinghouse/research/national_sport_research/market_segmentation_children

In order to illustrate and bring meaning to the market segmentation research findings and demonstrate its practical uses, a series of case studies have been supported by the ASC.



Case Study 4 – ‘SPACE RACING’ WITH ORIENTEERING VICTORIA

BACKGROUND

Orienteering Victoria (OV) is the peak-body for orienteering in Victoria. It oversees and implements orienteering programs at school, recreational and elite level. In recent years it has experienced a large growth in recreational orienteering including new products based on Street and Park orienteering (as opposed to traditional ‘bush’ orienteering). This diversification has been driven by consumers, who are seeking fitness outcomes from a sport participation opportunity that is accessible, recreational and relatively simple to do.

Orienteering has adapted to this need, which aligns to the findings of the ASC’s market segmentation research, by offering orienteering activities that utilise shortened and simplified courses (with less control points), in local park and street settings. These new approaches also integrate technologies that allow participants to access electronic timing systems that provide immediate results on-line. In coming months participants will be able to register using ‘smart’ phones and quick response (QR) codes on-site at local permanent orienteering courses and monitor their performance relative to other orienteers that have used the courses.

APPROACH

OV’s extensive school-based orienteering program includes a professional development program for teachers and helping schools develop their own on-site orienteering courses. OV has also tapped into children’s enjoyment of new technologies by conducting ‘space racing’ which is an orienteering product for children that utilises an electronic timing system incorporating digital punches and personalised data ‘sticks’. OV incorporated this innovation into a six-week program at Boronia Heights Primary School in outer-Melbourne which introduced students to the map reading and navigational skills required for orienteering.

The program began with four school-based sessions which helped the children develop basic navigational skills. The participants then experienced orienteering in a large local park (including a ‘Space Race’ challenge). The new program culminated with a group of the children being selected as the Boronia Heights Space Racing team which attended an orienteering event with other schools.

Peta Whitford is OV’s Promotion and Development Officer. Peta delivered the orienteering program for Boronia Heights Primary School and she has extensive experience running school programs, training teachers and developing school-based orienteering courses. Peta believes schools are looking for sports activities that are a bit different and are attracted to orienteering because it requires more than just athletic ability and good hand / foot- eye coordination which is the norm amongst most sports.

Peta’s view is that sport generally needs to be more inclusive; irrespective of ability and it also needs to be more flexible with when sport is scheduled. For instance, the vast majority of sport is offered on Saturdays but some children (and parents) don’t want to do sport on Saturdays, because of other



family, work and study commitments, and would rather participate at a different time such as a weekday evening.

RESULTS

The Boronia Heights Primary School orienteering program was conducted during school hours and attracted 75 participants. The overarching impression from Ben Harris, the physical education coordinator who oversaw the delivery of the program, was that the children “loved it” and it was a really positive experience.

Ben saw the orienteering program as being a bit different from other sports in that although it had a competitive element which catered for “the sporty kids”, the competition component was balanced by an inclusive, recreational element with an intellectual challenge, stemming from the navigational tasks involved in orienteering, which was attractive to those children that were generally less active in sport than other children. These children align with the market segment titled the Ponderers.

MARKET SEGMENT - PONDERERS

Ponderers are generally more willing to take up sporting opportunities that provide opportunities for fun and social participation without overt competitiveness. Ben described these sorts of children in the Boronia orienteering program as “...wanting to participate but holding back because they aren’t good at sport” and explained that some of the children “...wanted to do something where you didn’t have to be the best; even if you weren’t that good at it, it didn’t really matter”.

One child who thrived in the orienteering program at Boronia Heights Primary School had special needs. Normally “Steven” would refuse to do sport at school and was very reluctant to do club-based sport because “...*competition was so negative for him*”. According to Ben, Steven relished the school orienteering program, with its thinking component, and being able to do it on an individual basis, at his own pace and with a reduced focus on competition.

SUMMARY

The conundrum for the Boronia Heights program was that in providing both a competitive element and a fun, social element, the participant surveys highlighted that the competitive children found the program not competitive enough and the children that wanted fun, social participation and avoided the overt competitiveness, found the program too competitive. This demonstrates the importance of focussing programs on the needs of one segment rather than several groups. By trying to meet the needs of all, it can compromise your ability to adequately meet the needs of anyone.

School-based programs face this dilemma more than external, club or community sport programs because school programs are invariably based on class groups with limited ability to identify and target the motivations and likes of individual students. This is particularly the case in a typical primary school environment where the provision of sport and PE is squeezed by a multitude of competing priorities in the school curriculum. Sport and PE activities are invariably ‘one in, all in’.



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 Sport Participation report can be obtained by contacting asc_research@ausport.gov.au

