



Australian Government
Australian Sport Commission

Market Segmentation Pilots

CASE STUDY 5 – T20 BLAST

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 5 – ‘T20 BLAST’ WITH CRICKET NT

BACKGROUND

T20 Blast is a cricket program for children that has been developed by Cricket Australia to help children progress with confidence from its entry level In2Cricket program to competitive club cricket. Transition rates from In2Cricket to junior club cricket were less than optimal and cricket wanted to see more children progressing from one form of the game to the next. With the introduction of T20 Blast, it aims to deliver a fresher and more engaging cricket experience to engage a changing demographic and market and meet a preference for shorter format sports that aren't as demanding of people's time.

FORMAT

T20 Blast offers cricket in a way that is different to traditional forms of the game. Cricket has responded to the challenge that at a community level it is competing for families' time and there are many more sport and recreation opportunities available to children. T20 Blast is a quick, fun, fast, energetic, dynamic form of the game. It taps into the popular entertainment medium that the shorter forms of the game targets and which has been very attractive to children.

T20 Blast has the 'experience' of the weekly 75-minute sessions as the program's primary focus. The various elements, including music, specifically-modified formats, lots of simultaneous games and greater parent participation aim to create a vibrant experience for girls and boys.

A key aspect of T20 Blast is that it maximises participation for all children, not just the ones that are good at playing cricket.

Two other important elements that underpin this particular sport product and its appeal to children, is that it recognises that many children want to play to develop skills to play 'real cricket' and also that multiple games with numerous participants at the one venue creates an enjoyable atmosphere. This latter attribute helps satisfy the needs of those significant number of children that play sport for social reasons and to be with their friends.

APPROACH

MARKET SEGMENT – THRIFTY ENTHUSIASTS

Cricket NT conducted a version of T20 Blast that was focussed on the market segment ASC research titled Thrifty Enthusiast. Thrifty Enthusiasts are positive about physical activity and sport but 'thrifty' on their motivation to join traditional sporting clubs; cost is a factor and the proposition needs to be inclusive.

Thrifty Enthusiasts are the most attainable segment of the children's market, in terms of recruiting them into clubs and other sporting organisations. They have the least perceptual barriers regarding physical activity and clubs.

For this segment there are a number of products and services that will appeal; products that centre on making membership more cost accessible in terms of flexible membership pricing options, two



for one membership or providing value for money in terms of multiple sporting programs or activities. Thrifty Enthusiasts also show interest in options that enable entry or beginner level classes and equality. More flexibility in participation times is also appealing.

The following table shows how the Cricket NT T20 Blast program addressed the specific needs of Thrifty Enthusiasts

What attracts Thrifty Enthusiasts	What Cricket NT Offered
Making membership more cost accessible in terms of flexible pricing options	<ul style="list-style-type: none"> • Free come and try for the first session • Multiple payment options – participants could pay on a casual basis or for the whole program.
Options for entry level or beginner level classes and equality	<ul style="list-style-type: none"> • Grouping the children according to competency e.g. ‘beginner’ or ‘intermediate’ but rewarding and recognising them all in the same way, irrespective of their ability level.
More Flexible Participation Times	<ul style="list-style-type: none"> • Offering post school option on a weekday and a weekend participation option • Allowing participants to decide how many sessions they want to attend (they weren’t locked in for the entire eight-week program)

GAME MODIFICATIONS

Some of the practical ways that T20Blast was offered that it made it different to traditional cricket and which enhanced the experience and enjoyment of the targeted children’s market segment, the Thrifty Enthusiasts, included:

- Maximal and equal participation for all participants; All players bowl two overs each (it’s not just the best bowlers bowling) and 16 overs per team / innings regardless of how many wickets are lost
- The skills’ zone means the players on the batting team, that aren’t batting, are active and having fun.
- Softer ball means protective equipment isn’t required
- The games are shorter and fairly standard in length

ADDITIONAL CONSIDERATIONS

The program also strived to enhance the T20 Blast experience for girls by;

- Providing additional support from coaches / coordinators to female participants and their parents at each session.
- Inviting girls to attend sessions 30 minutes earlier than their young male counterparts so they can undertake fun skill development games involving both participants and their families. This ensures parents are given the games and skills to continue to work with their daughters beyond the program.



MARKETING AND COMMUNICATION

Cricket NT undertook a range of marketing and communication activities to promote the T20 Blast program including direct emailing of ex-participants. The email focused on the many attribute of the program (underlined below) that were targeted at the Thrifty Enthusiasts market segment. The communication focuses on the 'added value' that could appeal to the Thrifty Enthusiasts:

"...The MILO T20 Blast program is a fresh program that gives children and their parents a choice in how to participate. While you can play the whole program, you can also choose to simply pay-as-you-play on a week by week basis.

MILO T20 Blast is all about excitement and action. You'll play games of T20 just like your heroes in the KFC T20 Big Bash League, including big sixes, heaps of boundaries and classic catches.

Up to eight games on the one oval, music and friends and family watching guarantees MILO T20 Blast comes with all the atmosphere of T20. All this action in just one and half hours each week!

When you come along to MILO T20 Blast, not only will you get to bat, bowl and field in every game, you'll dance along to music, get a Adelaide Strikers cap and t-shirt, and enjoy all the fun and atmosphere that comes with T20!

RESULTS

EXPERIENCE OF PARTICIPANTS IN THE PROGRAMS

The coordinators of the NT Cricket program felt the focus on fun and enjoyment worked really well in attracting less confident and less sporty children. There were some children who were more competitive and wanted to know the game scores but the lack of focus on this was mostly embraced. This does highlight the differences in various market segments within the sport participation market and the challenges of meeting their individual needs. Interestingly, despite parents generally acknowledging the attraction of flexible payment options, the vast majority chose to sign-up and pay in advance for the full program.

The music, atmosphere and energy was really enjoyed by both children and parents. The fresh and new format of cricket was widely acknowledged by parents as both fun and more likely to keep their children playing cricket. Some parents expressed a desire to have an increased focus on skills development and this was addressed with the addition of a 'skills zone' alongside the games.

Some typical feedback included;

- *....They really enjoyed the program; it was delivered in a really fun and engaging way.*
- *The children had a lot of fun in a caring, safe and professional environment and have grown to really, really, really enjoy their cricket and are keen to continue.*

As is often the case, enthusiastic young participants are drawn to programs and will register irrespective of how it is promoted and designed. They (and their obliging parents) believe that, in this case study, playing cricket isplaying cricket! This can mean that programs modified to meet



the needs of less competitive children, may not be as satisfactory to those children that love traditional sport and competition and want to advance their skills which the market segmentation research labelled Social Loyalists and Sports Driven. A comment from a parent in the T20 Blast program that typifies these sport participants is;

- *Because he wants to play for Australia when he grows up (like most other little boys!!!), he would love to get back playing competitively and using the correct equipment, not a modified version.*

Ed Alexander, the Game Development Manager at NT Cricket, summarised the program as “... successful in terms of showcasing community cricket as something closer to the fun games played at school as opposed to the performance-focused perception of traditional cricket.” Other observations included:

- *“...The music, atmosphere and energy was very much enjoyed by both kids and parents.”*
- *“...The fresh and new format of cricket was widely acknowledged by parents as both fun and more likely to keep their kids playing cricket.”*


An added strength of the program was the involvement of year 11 and 12 college students participating in the VET sport education program. These students fulfilled coaching / leadership roles.

FUTURE PROGRAMS

NT Cricket felt there were a number of areas that could be improved for the next program, including;

- Better alignment with other activity such as AASC programs
- Delivery at a time when more school-based cricket activity can be exploited
- Better data collection during school activity to improve the effectiveness of follow-up communication.
- More concerted promotional campaign in the last weeks of the school term with more dynamic promotion through school holiday events.

In terms of using the market segmentation research, NT Cricket felt the marketing and communication needs to be as targeted and segment specific as possible. This will ensure as many participants as possible are from the target segment and will maximise participant satisfaction levels.



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

