

# SPORTAUS

## AUSPLAY



### **Bush Walking**

## State of Play Report

Driving Participation & Engagement

April 2019





## About this Report

The State of Play Report has been designed to deliver a single sport snapshot, to help identify trends and opportunities to maximise participation and engagement.

## AusPlay Data

The nationwide AusPlay survey has been running since October 2015, using Computer Assisted Telephone Interviewing (CATI).

The core aim of AusPlay data is to provide accurate and reliable information on trends in participation and physical activities among Australian residents, including Children Aged Under 15 and Adults 15+.

Annually, a total of about 20,000 interviews are conducted with Adults Aged 15+ and about 3,500 interviews with parents/guardians of Children Under 15.

AusPlay is carried out in compliance with ISO 20252 and membership requirements for the Association of Market and Social Research Organisations (AMSRO) and the Australian Market and Social Research Society (AMSRS).

## Data within this report

This report contains data collected from January 2016 to December 2018.

Data within this report has been prepared by Sport Australia and may vary from other published AusPlay data due to differences in definitions and/or data classifications.

# Bush Walking: State of Play Report

## Key Take Outs



### Overall Participation

The annual population estimate for Adults 15+ participating in Bush Walking was 1,174,049 (or 5.8% of the Adult 15+ population).

Adult participation was very gender balanced with 576,132 men (or 5.8% of the male population) and 597,918 women (or 5.9% of the female population) taking part in Bush Walking. This represents an almost equal (49%/51%) gender split in overall participation.

Bush Walking was most popular in the Australian Capital Territory (ACT) (10.6% of the ACT Adult 15+ population participated in Bush Walking) and Tasmania (10.2%).

Interestingly, participation in Bush Walking was significantly higher in major cities (5.9%) and inner/outer regional areas (6.2%) compared to remote and very remote locations (3.9%).

Not surprisingly, only 11% of Bush Walking participation was organised.

Unlike recreational Walking, which showed peak participation rates at later stages of life (55+), peak participation rates for Bush Walking was at 25-34 years of age for women (7.8%). Men's participation was similarly high at the same age (6.5%) but peaked at 55-64 years of age (7.7%).

### Frequency & Duration

Adults 15+ who participated in Bush Walking had a median frequency of

12 sessions per annum (about once per month) and the median session duration was 180 minutes.

### Motivations for Participation (Adults 15+)

The main motivations to participate in Bush Walking were 'Fun/enjoyment' (35%), 'To be outdoors/to enjoy nature' (34%) and 'Physical health or fitness' (32%). 'Social reasons' were also a motivator by just less than one in five (18%) participants. 'To be outdoors/enjoy nature' was clearly the dominant motive for younger participants. 'Fun/enjoyment' is slightly more prevalent at middle age and 'Physical health/fitness' becomes the primary motivation for older Bush Walkers aged 65+.

### Reasons For Dropping Out of Participation

The dominant reason for dropping out of Bush Walking participation was 'Poor health or injury' (25%) but other notable reasons were 'Don't like it' (16%) and 'Not a priority anymore' (14%).

### Growth & Opportunities

Net growth market opportunity is average to low.

# Bush Walking (Adults 15+)

## Snapshot



AusPlay data, Adult and Bush Walking Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Bush Walking Participants 15+ n=3,398



**Information on this page provides a snapshot of the Adult 15+ population, at total national level and by gender.**

Participation figures are shown as total volume among the Adult 15+ population and the % who have participated.

**This provides a read on participation levels, along with the market size when it comes to sports wear and apparel.**

Engagement & Participation	Total	Male	Female
Is Most Strongly Associated Sport/Activity (%)	1.6%	1.4%	1.8%
Is Most Strongly Associated Sport/Activity (People)	316,885	138,570	178,315
Participation (%)	5.8%	5.8%	5.9%
Participation (People)	1,174,049	576,132	597,918
Average Frequency Per Annum	32	33	31

Conversion to Organised & Club	Total	Male	Female
Participation (People)	1,174,049	576,132	597,918
Organised Participation (People)	130,637	61,737	68,900
<i>Conversion to organised (%)</i>	11%	11%	12%
Club Participation (People)	16,143	8,872	7,272
<i>Conversion to club – from Overall Participation (%)</i>	1%	2%	1%
<i>Conversion to club – from Organised Participation (%)</i>	12%	14%	11%

# Bush Walking (Adults 15+)

## Snapshot by State



AusPlay data, Adult and Bush Walking Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Bush Walking Participants 15+ n=3,398



Information on this page provides a snapshot of the Adult 15+ population, at total national level and by state.

Participation figures are shown as total volume among the Adult 15+ population in each state and the % who have participated.

This provides a snapshot to help identify state level strengths and weaknesses.

Engagement & Participation	Total	NSW	VIC	QLD	SA
Is Most Strongly Associated Sport/Activity (%)	1.6%	1.5%	1.5%	1.8%	1.5%
Is Most Strongly Associated Sport/Activity (People)	316,885	95,868	76,374	73,569	22,230
Participation (%)	5.8%	6.1%	5.3%	6.2%	6.3%
Participation (People)	1,174,049	384,124	266,518	252,546	90,107
Average Frequency Per Annum	32	35	26	32	32

Conversion to Organised & Club	Total	NSW	VIC	QLD	SA
Participation (People)	1,174,049	384,124	266,518	252,546	90,107
Organised Participation (People)	130,637	36,928	36,026	29,557	10,510
Conversion to organised (%)	11.1%	9.6%	13.5%	11.7%	11.7%
Club Participation (People)	16,143	5,209	4,040	4,151	751
Conversion to club – from Overall Participation (%)	1.4%	1.4%	1.5%	1.6%	0.8%
Conversion to club – from Organised Participation (%)	12.4%	14.1%	11.2%	14.0%	7.2%

# Bush Walking (Adults 15+)

## Snapshot by State



AusPlay data, Adult and Bush Walking Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Bush Walking Participants 15+ n=3,398



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Participation figures are shown as total volume among the Adult 15+ population in each state and the % who have participated.

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Engagement & Participation	Total	WA	ACT	NT	TAS
Is Most Strongly Associated Sport/Activity (%)	1.6%	0.9%	2.5%	0.9%	4.2%
Is Most Strongly Associated Sport/Activity (People)	316,885	20,557	8,539	1,767	17,980
Participation (%)	5.8%	4.1%	10.6%	3.7%	10.2%
Participation (People)	1,174,049	93,802	35,717	7,340	43,895
Average Frequency Per Annum	32	36	31	48	33

Conversion to Organised & Club	Total	WA	ACT	NT	TAS
Participation (People)	1,174,049	93,802	35,717	7,340	43,895
Organised Participation (People)	130,637	7,133	5,314	1,587	3,582
Conversion to organised (%)	11.1%	7.6%	14.9%	21.6%	8.2%
Club Participation (People)	16,143	1,256	204	197	336
Conversion to club – from Overall Participation (%)	1.4%	1.3%	0.6%	2.7%	0.8%
Conversion to club – from Organised Participation (%)	12.4%	17.6%	3.8%	12.4%	9.4%

# Bush Walking (Adults 15+)

## Trends

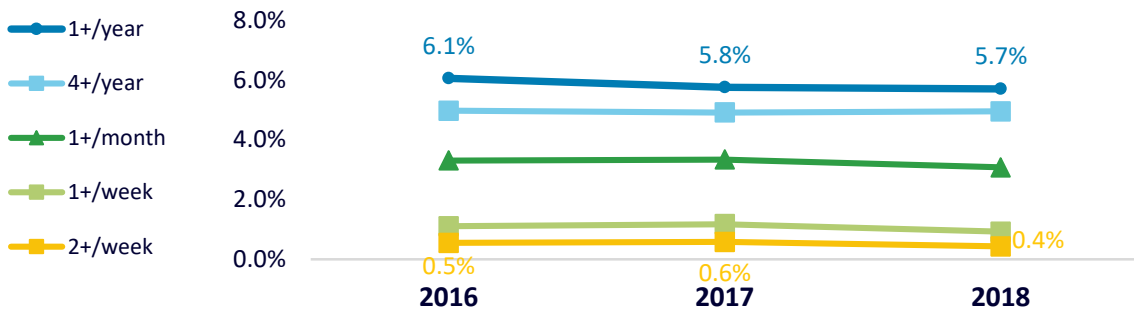


Information on this page provides overall participation and organised participation trends among the Adult 15+ population.

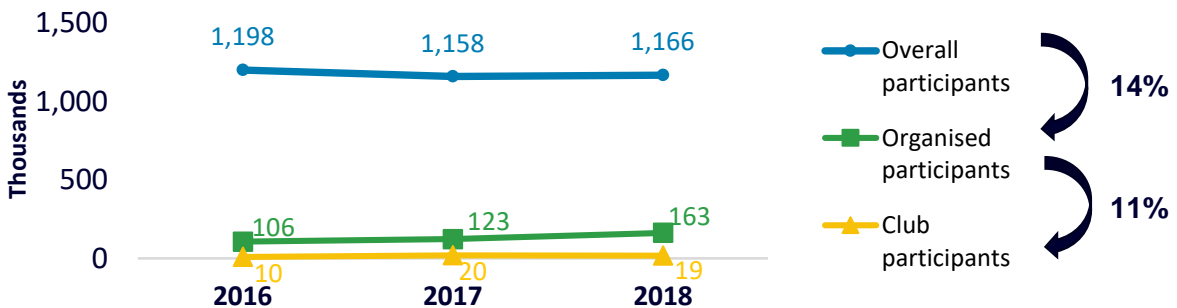
As more data becomes available in subsequent report releases, time series data will be expanded.

This provides a read on participation trends to identify if a sport/activity is gaining or contracting when it comes to participation metrics.

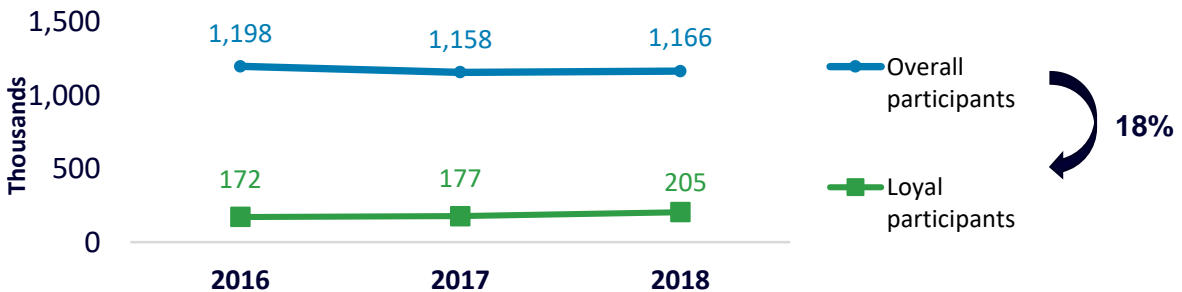
### Participation Trends



### Conversion to Organised - Evolution



### Loyalty among Participants - Trend



# Bush Walking

## State of Play Report

Adults 15+





# Bush Walking (Adults 15+) Participation Levels



AusPlay data, Adult and Bush Walking Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Bush Walking Participants 15+ n=3,398

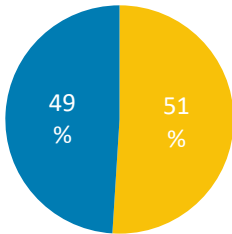


Information on this page provides a snapshot of the Adult 15+ population, at total national level and by gender.

Gender split shows the contribution each gender makes when it comes to total participation. Participation levels are shown as total volume among the Adult 15+ population and the % who have participated.

This provides a snapshot to help identify the age and gender groups that are driving current participation volume, whilst also helping to identify potential growth opportunities.

## Gender Split



## Participation Levels

	Total Participation	Male Participation	Female Participation
%	5.8%	5.8%	5.9%
000's	1,174.0	576.1	597.9

## Participation Levels by Age and Gender

### Peak Participation by Age



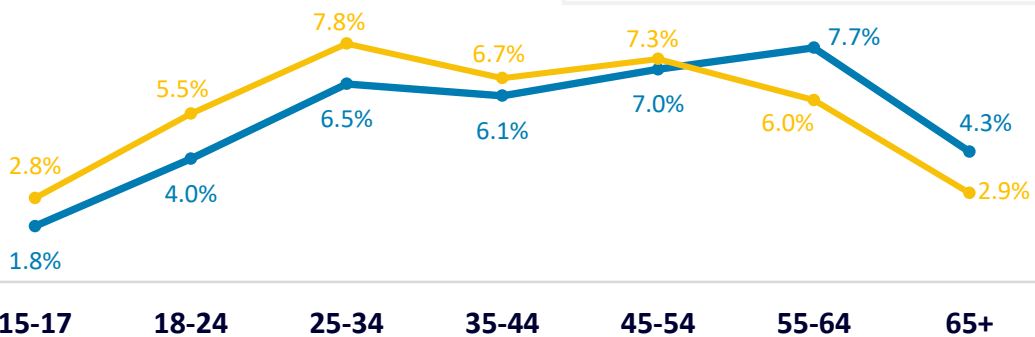
55-64

Male



25-34

Female



# Bush Walking (Adults 15+) Participation by Location



AusPlay data, Adult Population 15+: January 2016 to December 2018 Adult 15+ n=61,579

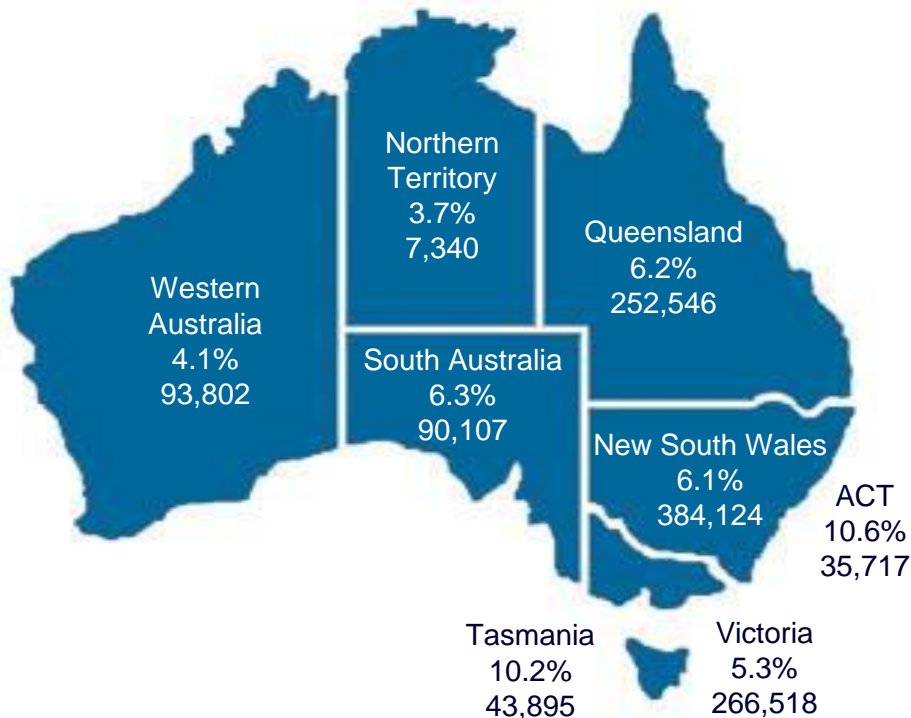


Information on this page provides a snapshot of the Adult 15+ population, based on state and geography.

Participation levels are shown as total volume among the Adult 15+ population and the % who have participated.

This provides a snapshot to help identify state level participation, as well as differences across metro, regional and remote areas.

## Participation Levels by State



	Total National Participation	Major Cities	Inner & Outer Regional	Remote & Very Remote
%	5.8%	5.9%	6.2%	3.9%
000's	1,174.0	823.8	316.3	11.8

# Bush Walking (Adults 15+)

## Player Profile



AusPlay data, Adult and Bush Walking Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Bush Walking Participants 15+ n=3,398



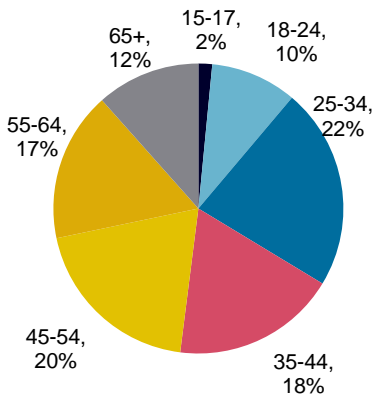
Information on this page provides a snapshot of the Adult 15+ population, based on age and gender, as well as LOTE, People with Disability and Indigenous.

Share of Play by Gender and Age shows the contribution of each group when it comes to overall participation.

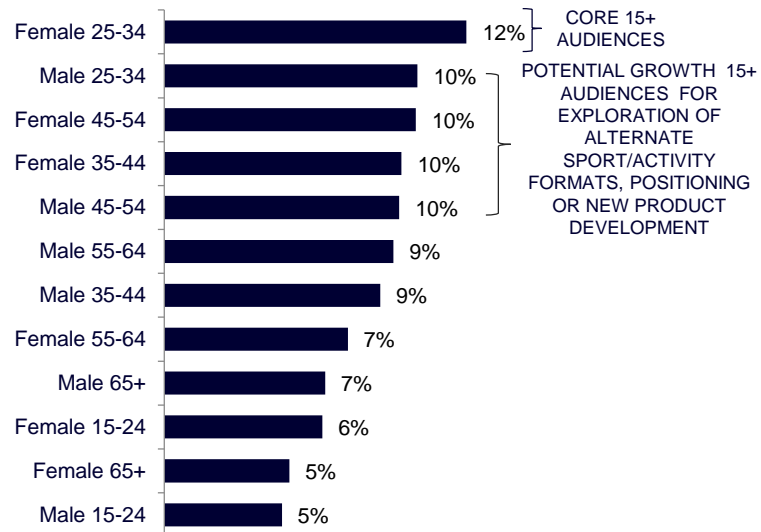
This helps identify the specific age and gender groups that are having the greatest impact on overall participation levels, whilst also highlighting growth opportunities when it comes to sport/activity formats that extend beyond traditional demographic audience needs.

### Player Profile by Gender and Age

#### Age Split



#### Share of Play by Gender & Age



### Participation Levels by Population Group

	Total National Participation	LOTE (Speak language other than English at home)	People with Disability	Indigenous
%	5.8%	4.8%	4.3%	4.4%
000's	1,174.0	163.8	130.0	19.0

# Bush Walking (Adults 15+) Frequency & Duration



AusPlay data, Adult and Bush Walking Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Bush Walking Participants 15+ n=3,398

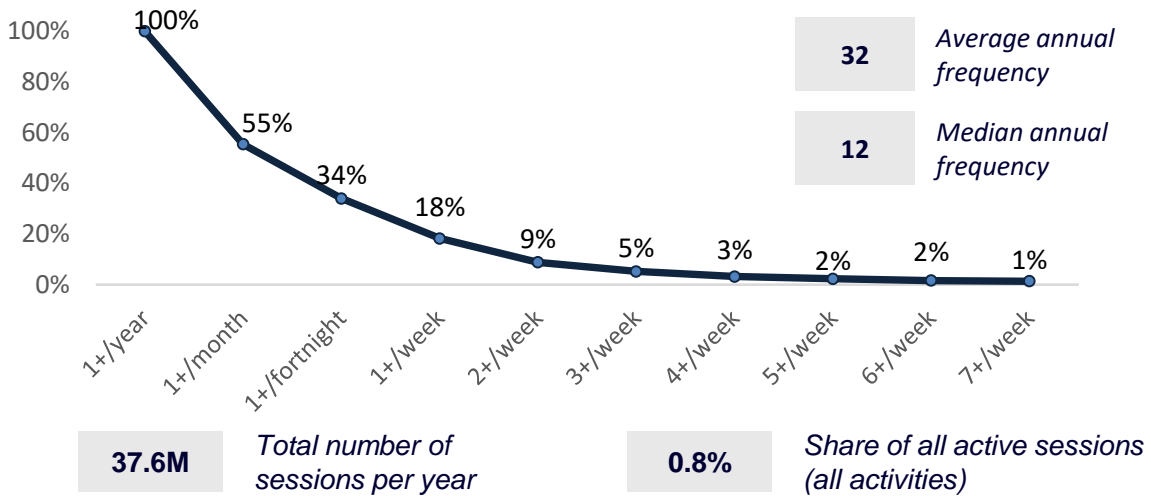


Information on this page provides a snapshot of the Adult 15+ Participant Population, in terms of frequency and duration of participation.

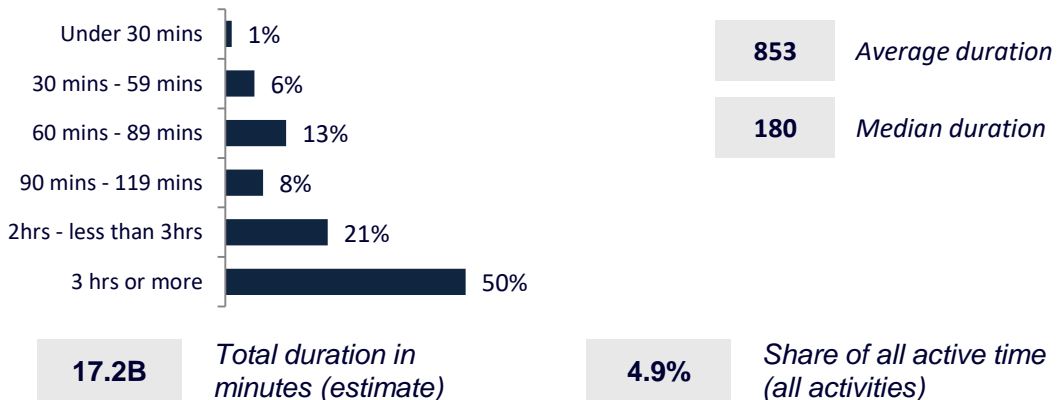
Frequency of participation provides a read on how often participation occurs. Duration provides a read of how long is spent each time participation takes place.

This helps identify opportunities among the Participant Population, in terms of initiatives aimed at boosting the total number of sessions per year by increasing frequency of participation.

## Participation Levels by Age and Gender



## Participation Levels by Age and Gender



# Bush Walking (Adults 15+) Participation



AusPlay data, Adult and Bush Walking Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Bush Walking Participants 15+ n=3,398

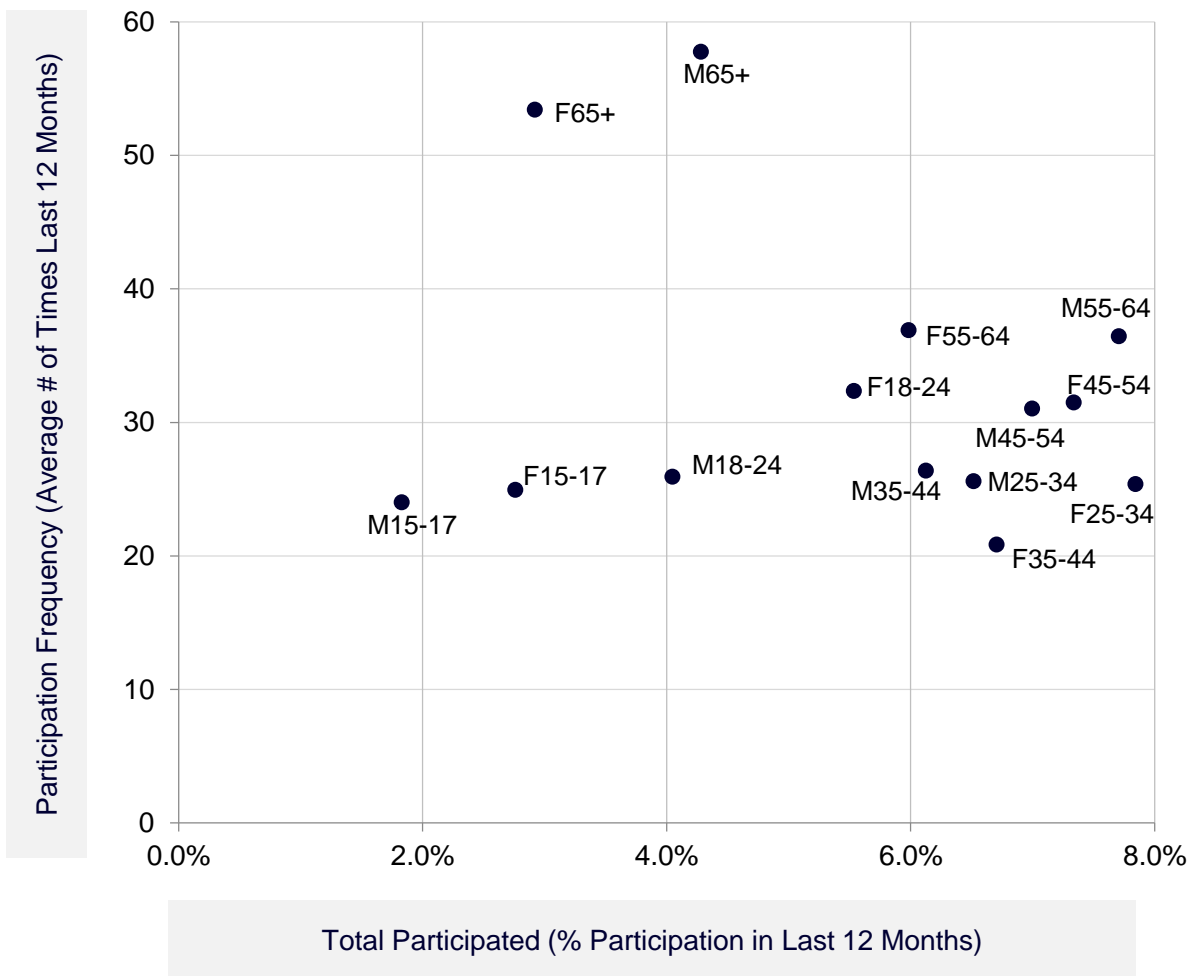


Information on this page provides a snapshot of the Adult 15+ Population in terms of participation and number of times participated in the last 12 months.

Figures are shown by age and gender groups, with those in the top right section being the most active on both measures.

This illustrates the participation profile across different age and gender groups, to identify key opportunities at age and gender level.

## Participation & Frequency by Age



# Bush Walking (Adults 15+)

## Current Market Position



AusPlay data, Adult Population 15+: January 2016 to December 2018 Adult 15+ n=61,579

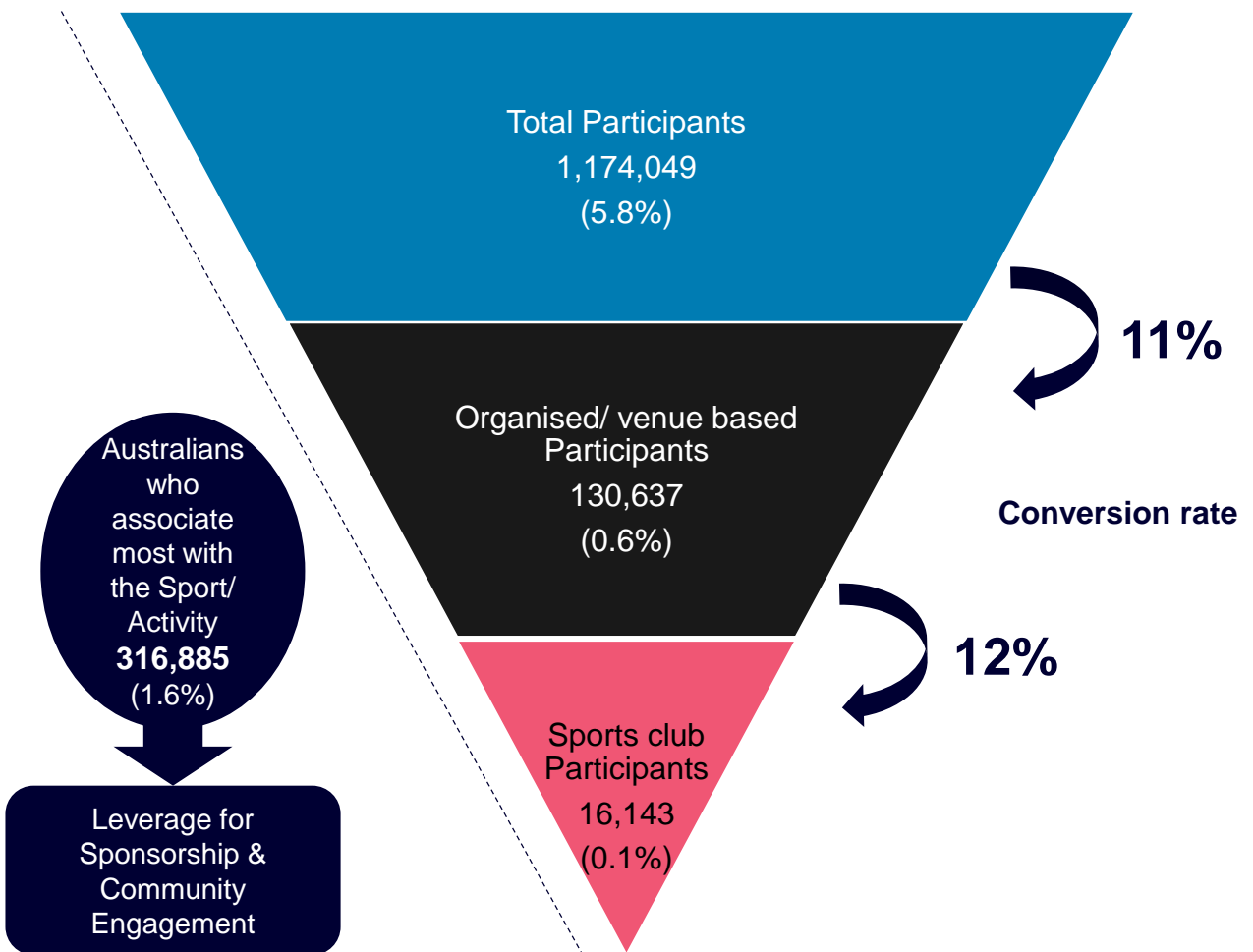


Information on this page provides a snapshot of the Adult 15+ Population, in terms of total participation, organised/venue based participation and sports club participation.

Conversion figures show the conversion from one level to the next.

This highlights opportunities to build on the total participation base to drive increased organised/venue based participation and sports club participation.

### Bush Walking Association & Participation Levels



# Bush Walking (Adults 15+) Engagement



AusPlay data, Adult and Bush Walking Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Bush Walking Participants 15+ n=3,398

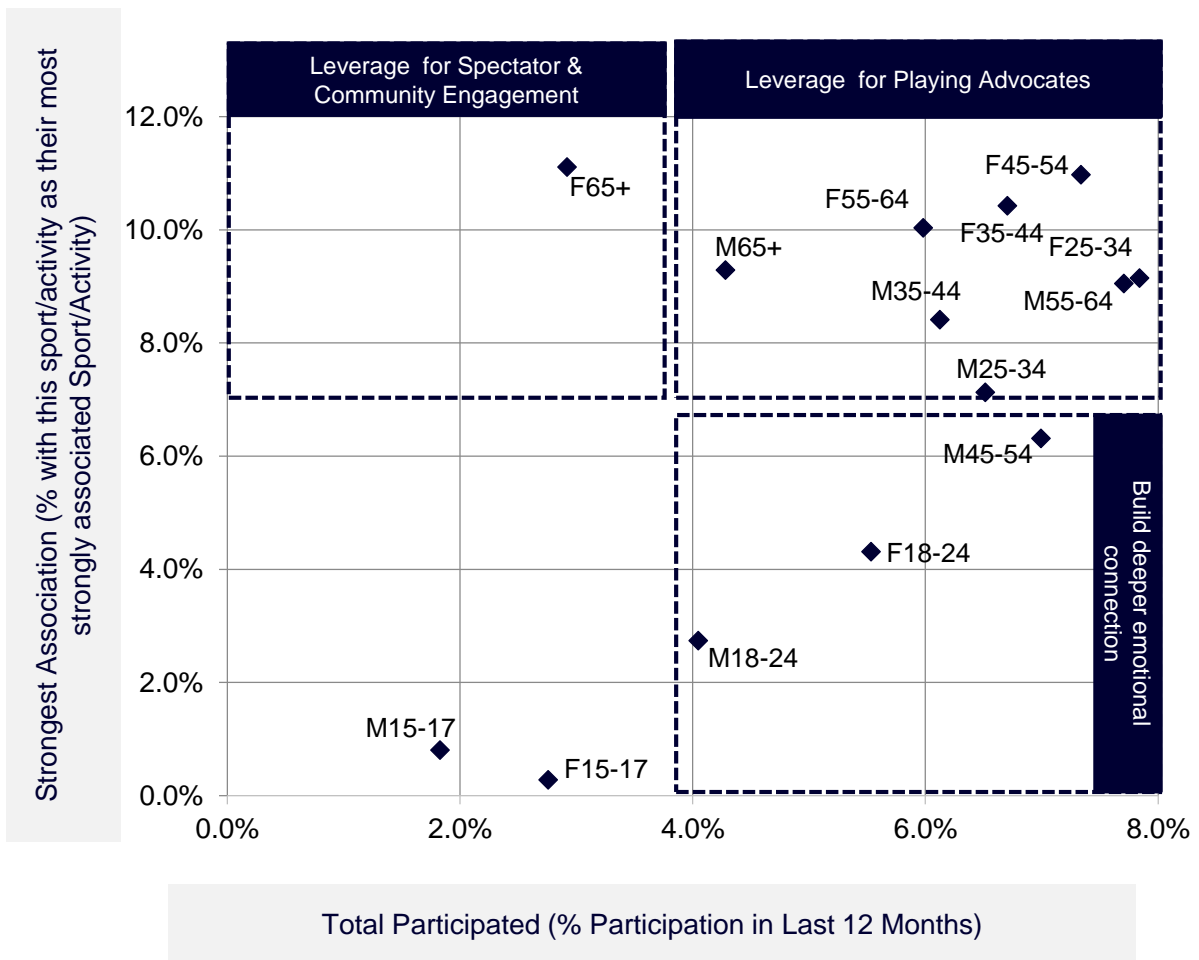


Information on this page provides a snapshot of the Adult 15+ Population in terms of participation and the % of the Adult 15+ Population who have nominated this as the sport/activity they most strongly associate with.

Figures are shown by age and gender groups, with those in the top right section being the most active on both measures.

This highlights opportunities to leverage demographic groups that have a strong association with a sport/activity and those who participate.

## Participation & Association by Age





# Bush Walking (Adults 15+)

## Spend Profile



AusPlay data, Bush Walking Participant 15+: January 2016 to December 2018 n=3,398

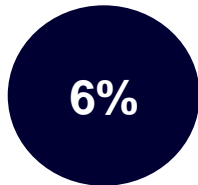


Information on this page provides a snapshot of the Adult 15+ Population, in terms of paid participation.

Figures shown are based on annual spend.

Median and average annual spend figures illustrate the incremental annual uplift in expenditure on participation that can be attributed to each additional person who pays to participate in this sport/activity.

### Bush Walking Overall Spend Levels



of participants  
paid to  
participate

	All	Club
Median annual spend	\$80	\$50
Average annual spend	\$838	\$565
Share of total spend (Share of all activities participated in)	0.6%	0.3%



Total expenditure on all participation

**\$52,886,787**



Total expenditure on **club** participation

**\$7,428,698**

Participation Spend by Gender	Total	Male	Female
Paid to Participate (%)	6.0%	5.0%	6.8%
Paid to Participate (People)	69,948	29,092	40,856
Average annual spend per participant	\$838	\$637	\$978
Total national annual spend	\$52.9M	\$16.6M	\$36.3M



# Bush Walking (Adults 15+) Market Outlook & Opportunity



AusPlay data, Adult Population 15+: January 2016 to December 2018 Adult 15+ n=61,579



Information on this page provides a snapshot of the Adult 15+ Population in terms of market opportunity.

Figures shown represent volume of Adults 15+.

The gap between those considering this sport/activity and those at risk of dropping out/ have already dropped out represents the net increase in total market opportunity.

## Bush Walking Market Opportunity



# Bush Walking (Adults 15+) Market Outlook & Opportunity



AusPlay data, Adult Population 15+: January 2016 to December 2018 Adult 15+ n=61,579



Information on this page provides a snapshot of the Adult 15+ Population by gender and age in terms of market opportunity.

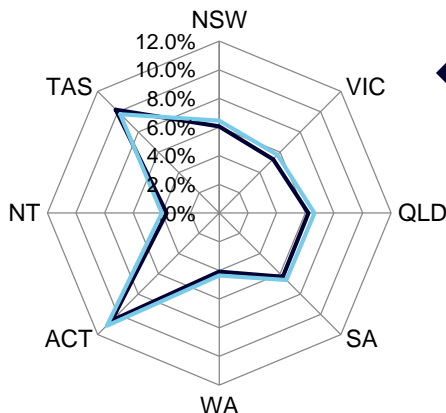
Figures shown represent the volume of people and %'s.

This highlights the strongest opportunities by gender and age, with the gap between those considering this sport/activity and those at risk of dropping out/ have already dropped out representing the net increase in market opportunity among each group.

## Bush Walking Market Opportunity by Gender & Age

	TOTAL	♂	♀	15-24	25-44	45-64	65+
Participants – last 12 months (%)	5.8%	5.8%	5.9%	4.1%	6.8%	7.0%	3.6%
Participants – last 12 months (People)	1,174,049	576,132	597,918	131,080	479,483	427,569	135,917
Considering Next 12 Months (%)	0.5%	0.5%	0.5%	0.4%	0.5%	0.7%	0.3%
Considering Next 12 Months (People)	97,961	51,013	46,948	11,921	34,501	41,129	10,410
At Risk of Dropping Out or Have Already Dropped Out (%)	1.6%	1.0%	2.1%	3.9%	1.4%	1.2%	1.1%
At Risk of Dropping Out or Have Already Dropped Out (People)	18,270	5,686	12,585	5,164	6,633	5,013	1,460
Net Gain/ Loss (People)	79,690	45,327	34,363	6,757	27,867	36,116	8,950
<b>Projected (People)</b>	<b>1,253,740</b>	<b>621,459</b>	<b>632,281</b>	<b>137,837</b>	<b>507,350</b>	<b>463,685</b>	<b>144,867</b>

## Bush Walking Market Opportunity by State



— Current Participation  
— Projected Participation

This shows market opportunity by state, on a per capita basis.

# Bush Walking (Adults 15+)

## Motivations for Participation



AusPlay data, Bush Walking Participant 15+: January 2016 to December 2018 n=3,398



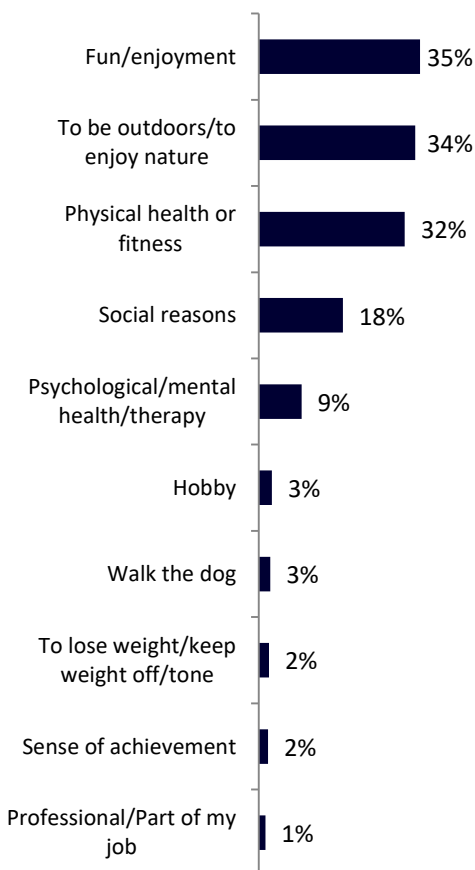
Information on this page provides a snapshot of the Adult 15+ Population as well as by gender and age in terms of motivations to participate.

Adult 15+ motivations are shown to the left and gender and age specific motivations are shown to the right.

This highlights the dominant overall motivations as well as similarities and differences at age and gender level. When designing strategies, products or messaging to engage with specific demographic groups, these should be built around the core motivations of that audience.

### Top 10 Motivations to Participate\*

#### Adults 15+



#### By Gender

	1st	2nd	3rd
Male	Fun/ enjoyment	To be outdoors/ to enjoy nature	Physical health/ fitness
Female	Fun/ enjoyment	To be outdoors/ to enjoy nature	Physical health/ fitness

#### By Age

	1st	2nd	3rd
15-17	To be outdoors/ to enjoy nature	Fun/ enjoyment	Physical health/ fitness
18-24	To be outdoors/ to enjoy nature	Fun/ enjoyment	Physical health/ fitness
25-34	To be outdoors/ to enjoy nature	Fun/ enjoyment	Physical health/ fitness
35-44	To be outdoors/ to enjoy nature	Fun/ enjoyment	Physical health/ fitness
45-54	Fun/ enjoyment	Physical health/ fitness	To be outdoors/ to enjoy nature
55-64	Fun/ enjoyment	Physical health/ fitness	To be outdoors/ to enjoy nature
65+	Physical health/ fitness	Fun/ enjoyment	To be outdoors/ to enjoy nature

\* Multiple response question

# Bush Walking (Adults 15+)

## Top 10 Reasons for Drop Out or Consideration



AusPlay data, Adult Bush Walking Participants 15+, that are dropping out of participation in the next 12 months: January 2016 to December 2018 n=53; Adult Population 15+: n=61,579;

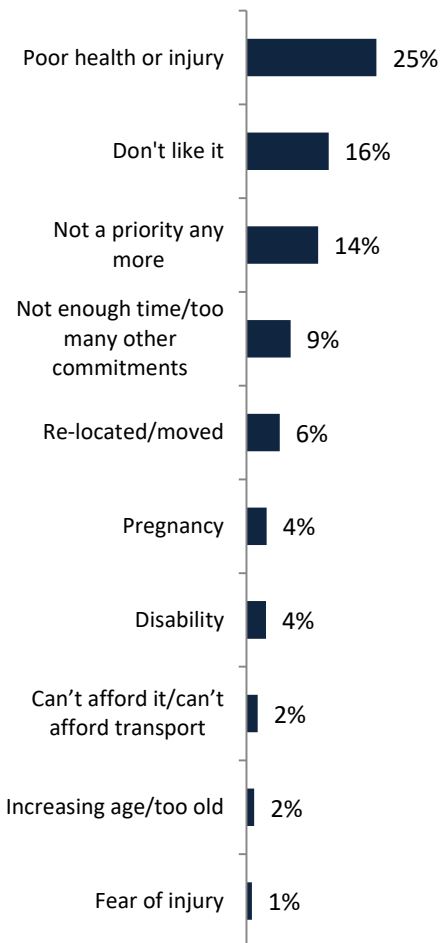


Information on this page provides a snapshot the top 10 reasons for dropping out as well as the top 10 reasons for considering this sport/activity.

Responses are multiple response, meaning more than one reason can be given.

Identifying reasons for dropping out can play a role in identifying opportunities for innovations in product portfolio or alternate sport/activity formats. Identifying reasons for consideration can play a role in optimising messaging, communications and advertising.

### Top 10 Reasons for Drop Out



### Top 10 Reasons for Consideration



\* Multiple response question



## Where to from here?







More information about AusPlay, including the methodology summary, survey questions, key terms and definitions, national tables etc., can be accessed via Sport Australia's Sport Market Insights on the Clearinghouse for Sport website (with direct access through [researchinsport.com.au](https://researchinsport.com.au)). Please use your Clearinghouse for Sport login for full access.

Any further questions about AusPlay (or queries for additional customised reporting/further analysis of the dataset) can be directed to Sport Australia via: [AusPlay@sportaus.gov.au](mailto:AusPlay@sportaus.gov.au).



**Australian Government**  
**Australian Sports Commission**

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