



# MARKET SEGMENTATION FOR SPORT PARTICIPATION ADULTS AGED 14 - 65 YEARS OLD

Segment Descriptions

# Overview

- This booklet provides a basic overview of sport and sports club market segments within the Australian population aged 14-65 years old.
- Market segmentation approaches can shed light on the different types of attitudes that people you see around you have about sports and sports clubs:
  - by showing some basic demographic information which you can compare to the population around you / your key targets for acquisition
  - allowing for the attitudes and needs of each segment to be explored in depth
  - providing a framework whereby different products and services can be matched to the needs of different segmentations

## What is a market segmentation?

A market segmentation involves dividing a market into groups of people with similar needs, attitudes and / or behaviours

By identifying and effectively targeting segmentation groups among the wider population, it is possible to improve return on marketing investment and efforts

## What can a market segmentation do for you?

- This document describes the different groups within the general population in terms of their attitudes to sport and physical activity, their attitudes to sports club membership, and their membership of sports clubs. The aim of the segmentation is to enable the broader sports sector (including NSOs, SSOs, clubs and so on) to:
  1. understand how different groups within the community relate to sport clubs
  2. identify groups that may be relevant to individual clubs within their local context
  3. understand what type of products and services may meet the target segments' needs to encourage uptake or maintenance of club membership
  4. engage in more effective and efficient communications to target groups by understanding what channels to use and the types of messages that will be most relevant and motivating with relation to clubs; and
  5. identify the potential for growth opportunities with regards to sport club membership by understanding the needs of different segments and the products they may be attracted to
- Additionally, the segmentation can also indicate general opportunities to engage outside of the traditional club offer.
- The ideas and recommendations shown for each segment are a broad guide for driving growth of club membership and should be reviewed and implemented in conjunction with local knowledge and the expertise of professionals in the sports delivery sector.

## How the segments were developed

A multi-stage approach was used to develop the segments.

### Stage 1:

Qualitative research consisting of focus groups and interviews among the Australian community aged 5 – 75 years. This research sought to understand the factors impacting on participation in sports and recreational activity and membership of sports clubs. From the qualitative research, 10 archetypes of sports club and non sports club members were developed to inform the design and analysis of the quantitative research.

### Stage 2:

Quantitative research, where a total of 5004 online surveys were completed by 3498 Australian adults (aged 14-65 years old) and 1506 children (aged 5-13 years old).\* This research stage aimed to validate and refine the archetypes identified in the qualitative research and ultimately size and profile the resulting segments.

*\*Note – children aged 14-17 years old were included as part of the 'adult survey' as they were deemed to have more decision making influence than those aged 5-13 years old. For those aged 5-13 years old, surveys were conducted with the parent and child.*

## Some background on the quantitative methodology (14-65 year olds)

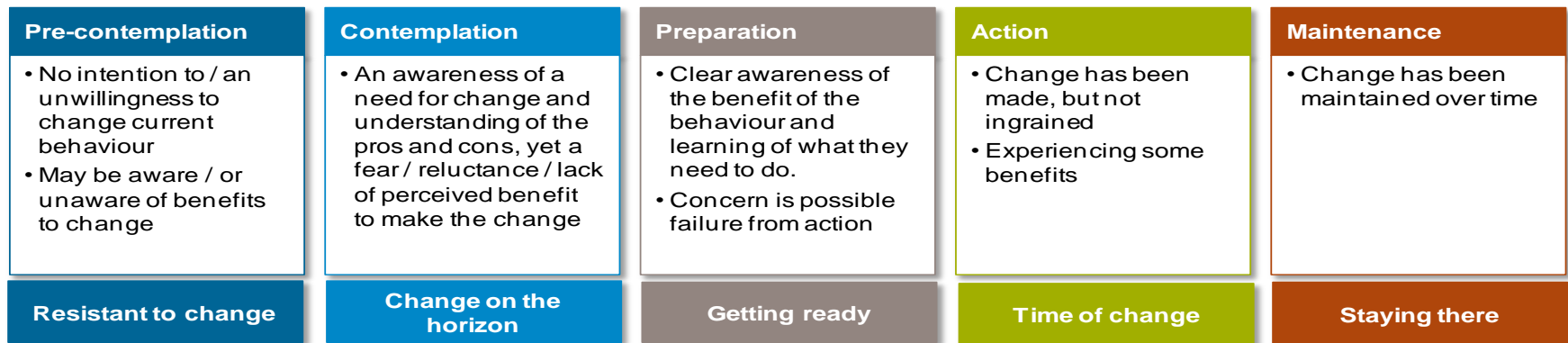
- Representative quotas of the Australian population were set for age and gender for each state. This ensured the representativeness of the sample at a national and state level. Minimum quotas were also set for special audiences in the Adult survey. Quotas for Culturally and Linguistically Diverse (CALD) individuals were set for n=680 of which n=657 were achieved. Quotas were also set for Aboriginal and Torres Strait Islander (ATSI) respondents (n=75 of which n=139 were achieved).
- These quotas were based on the Australian Bureau of Statistics (ABS) population data using the 2011 census information to ensure that enough respondents were available in these important sub groups for separate analysis at a total population level.
- Because a sample, rather than the entire population was surveyed the percentage results are subject to sampling tolerances. For our total sample of 3498 individuals, on a question where 50% of the people respond with a particular answer, the chances are 95 in 100 that this result would not vary more than 1.66% percentage points, plus or minus, from the result that would have been obtained from a census of the entire population (using the same procedures).

Reporting groups	Sample size	Maximum margin of error +/- at 50%
Total 14-65 years old	3498	1.66%
Sport Atheists	220	6.61%
Sport Indifferent	688	3.74%
Self Focused	468	4.53%
Ponderers	709	3.68%
Club Wary	236	6.38%
Sidelined Sportsters	499	4.39%
Apathetic Clubbers	131	8.56%
Sport Driven	114	9.18%
Socially Engaged	223	6.56%
Loyalists	210	6.76%

# Prochaska's trans-theoretical model of behaviour change\* was used as the underlying basis in developing the segmentation



- The basic framework for the trans-theoretical model of behavioural change trans-theoretical also provides a summary to assist in understanding how this applies to communication needs provided below.



- Interventions that use this model tend to focus on identifying and targeting the groups that are open to changing to the desired behaviour, which are those that sit in the contemplation and preparation stages with the aim to move them into the action and maintenance stages. At the same time, the intervention should reinforce the behaviours of those who are in the action and maintenance stages. When the intervention being applied is communications, the focus can be on addressing simple issues such as a lack of awareness about a product or service, or it could be about providing additional motivation through highlighting greater benefits or addressing some of the barriers identified.

\*Prochaska JO, Velicer WF. The trans-theoretical model of health behaviour change. Am J Health Promot 1997 Sep-Oct;12(1):38-48. Accessed 2009 Mar 18. Please note, Prochaska's model states 'maintenance as expected to last up to five years'

## The resulting segmentation was based on attitudes to sport / physical activity and sports club membership

- The segmentation was developed from variables measuring survey respondents' (a) sports club membership status, (b) attitudes to sport/physical activity, and (c) attitudes to sports clubs.
- While levels of sport / physical activity are closely related to attitudes, they were not used in the segmentation model. The rationale being ...

There are people who are interested in and have a relatively favourable pre-disposed to clubs, but for some reason do not participate in sport very often or are members of a club.

From a commercial perspective these are potential members.

At the same time, there are people who do not participate in sport by choice and who do not have a favourable attitudes towards clubs. This group is unlikely to be open to promotional information about sporting clubs products and services.

From a commercial perspective these are *not* potential members.

- If the segmentation is only based on behaviour - i.e. non participation in sport/physical activity and non sport club membership - it would not be possible to identify who is a potential customer.
- A segmentation based on differences in attitude means that marketing can be targeted to meet the needs of those who are potential customer.



## Using current club membership as a key variable

- The total sample was split into those who are members of sporting clubs and those who are not.
- This allows us to identify whether there are different issues, and potentially different solutions for members and non-members.

### The key aims for the non club member group are to identify:

- What type of non member groups have the greatest potential for acquisition
- The barriers to joining a sporting club and how these barriers can be overcome
- What products and services could encourage club membership
- What communications are needed to support these

### The key aims for the club member group are to identify:

- What the motivators to club membership are and how to reinforce these motivators
- What products and services could encourage renewal of club memberships
- What communications are needed to support these
- Those most at risk of lapsing their club membership, and the challenges that must be overcome to encourage membership retention

# A snapshot of the segments

Club members

Non club members

This diagram is a visual representation of the segments based on two variables: club membership and disposition; and attitudes towards participation in sport / physical activity .

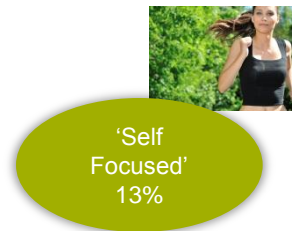
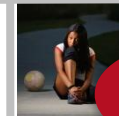
The vertical axis represents a. club membership status (segments above the line are members, segments below the line are non-members) and b. attitudes and consideration toward clubs

The horizontal axis represents attitudes to sport / physical activity.

Negative attitudes to sport and physical activity

Positive attitudes to club membership

Positive attitudes to sport and physical activity



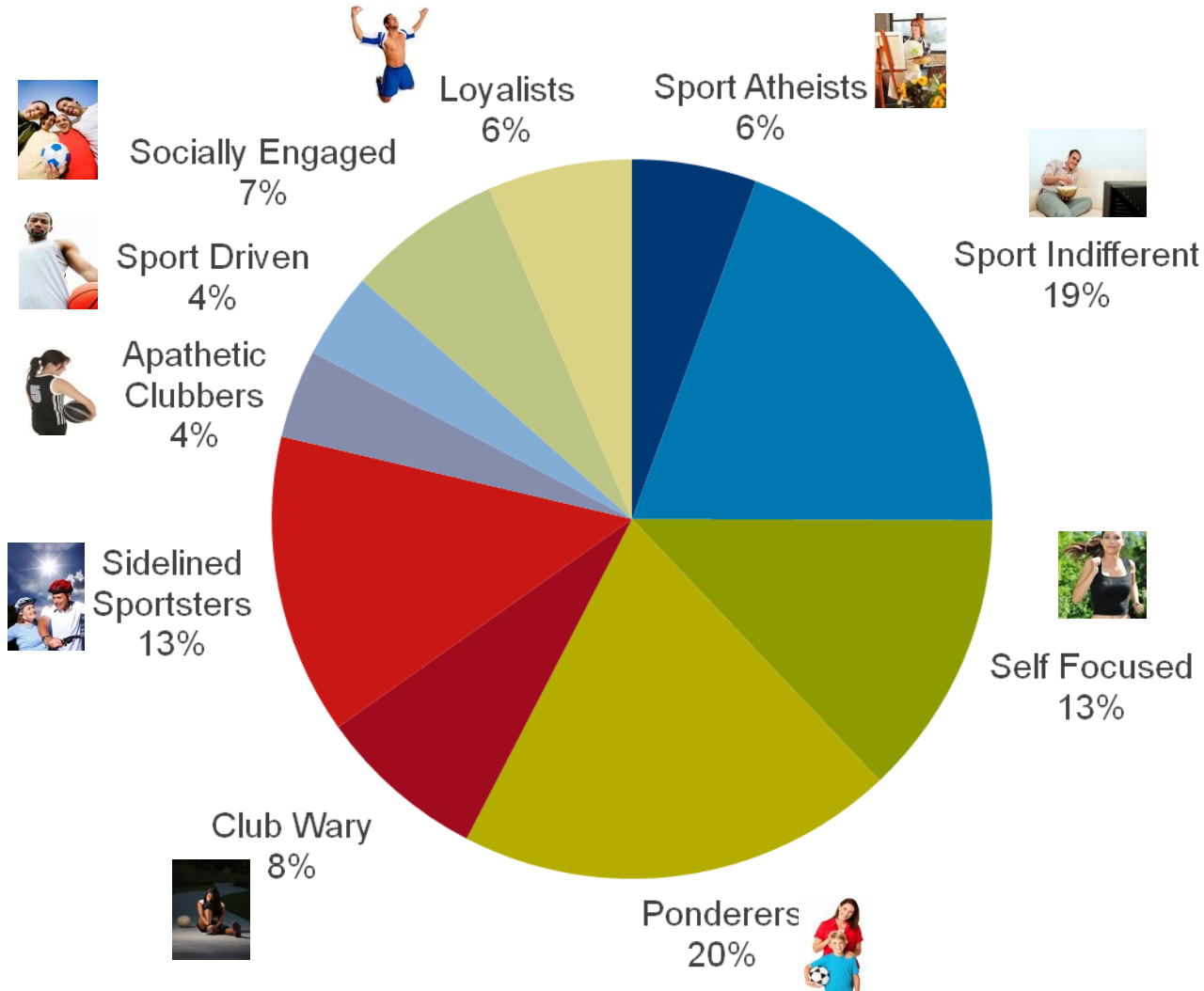
Negative attitudes to club membership

# How to identify the segments

Club Members		Loyalists	<i>"Sport and my club are my life – I couldn't live without them"</i>	
		Socially Engaged	<i>"I really enjoy being part of my club sports team but it's as much about having a laugh with my mates as it is about the sport"</i>	
		Sport Driven	<i>"I'm a member of a club because my membership provides me with easy access for playing my sport and I'm not that interested in the social side of being a member"</i>	
		Apathetic Clubbers	<i>"I've been playing sport since I was young but clubs are just too competitive now – everyone in a club takes it so seriously"</i>	
Non club Members	Potentials		Sidelined Sportsters	<i>"I really love sport but I don't want to be committed to things like a sports club – I don't really have the time"</i>
			Club Wary	<i>"I love my sport but sports clubs are full of 'cliquey' people – I just wouldn't fit in"</i>
	Non Potentials		Ponderers	<i>"I'd like to find a way to do more exercise and sport but I don't know how to find something that suits my lifestyle"</i>
			Self Focused	<i>"I like to make my own structure and routines when it comes to physical activity - my main goal is self improvement"</i>
			Sport Indifferent	<i>"While I don't have an issues with sport in general, I'm not really into it - I can't see what joining a sport club would do for mebut I'm not really into it - I can't see what joining a sport club would do for me"</i>
			Sport Atheists	<i>"I don't see any benefit to sport or physical activity. Sport is overrated – it just makes you feel tired"</i>

# Segmentation of Australians 14-65 years old

## % of the Australian population



Segment	Estimated Population figures
Loyalists	980,683
Socially Engaged	1,052,618
Sport Driven	584,186
Apathetic Clubbers	599,952
Sidelined Sportsters	2,035,878
Club Wary	1,145,957
Ponderers	2,969,162
Self Focused	1,943,507
Sport Indifferent	2,938,300
Sport Atheists	844,056

## A snapshot of the segments – demographic

All Respondents Column %	Total 14-65 (n=3948)	Sport Atheists (n=220)	Sport Indifferent (n=688)	Self Focused (n=468)	Ponderers (n=709)	Club Wary (n=236)	Sidelined Sportsters (n=499)	Apathetic Clubbers (n=131)	Sport Driven (n=114)	Socially Engaged (n=223)	Loyalists (n=210)
Male	50	45	51	32	49	51	50	59	56	61	64
Female	50	55	49	68	51	49	50	41	44	39	36
14-17	17	14	13	12	9	21	8	30	35	36	36
18-29	14	9	15	12	14	21	9	16	24	10	11
30-39	23	15	27	22	26	27	23	23	26	17	14
40-49	16	17	16	18	19	15	16	12	10	16	9
50-59	19	29	17	22	20	11	28	11	4	11	18
60-65	12	16	11	14	13	5	16	8	2	9	13
18-65	83	86	87	88	91	79	92	70	65	64	64
HH with children	35	22	32	34	40	45	31	34	53	38	31
HH without children	65	78	68	66	60	55	69	66	47	62	69
Under \$50K	29	40	33	31	27	24	30	21	28	14	20
\$50K - \$70K	13	10	13	14	12	15	12	15	15	14	19
\$70K and above	42	34	35	42	41	45	39	46	51	60	50
ATSI	5	4	4	5	3	6	7	3	8	3	5
CALD	21	8	24	15	25	38	16	22	44	11	7

### Demographics and Screening

xx /xx Segment group significantly HIGHER / LOWER than other segments according to 95% confidence intervals

# Each segment has its own challenges and opportunities



		<i>The Challenge</i>	<i>The Opportunities</i>	
Club Members	Loyalists	Increasing/maintaining enthusiasm and involvement	Products and services (e.g. Coaching opportunities) to develop/advance themselves and others	
	Socially Engaged	Increasing/maintaining social involvement	Products and services that promote the social aspects of sport and leverage their social nature (e.g. advocacy / referrals for clubs)	
	Sport Driven	Retention by ensuring flexibility of sporting accessibility/requirements	Products and services that are flexible enough to cater to personal circumstances while promote sport participation as a focus	
	Apathetic Clubbers	Retention by reducing the perceived over emphasis on competition	Products and services for non competitive participation	
Non club Members	Potentials	Sidelined Sportsters	Encouraging trial and participation	Trial offers and products and services that address flexibility of membership and personal / physical needs
		Club Wary	Encouraging consideration and trial by overcoming perceptions of clubs as 'exclusive' or 'cliquey'	Trial offers and promotion of products and services that are inclusive
	Ponderers	Encouraging consideration and trial by overcoming perceptions of clubs as being difficult to fit into lifestyle	Trial offers and products/services that address their busy lifestyle constraints (e.g. flexible membership, family membership and support services)	
	Non Potentials	Self Focused	Encouraging consideration by communicating benefits of sport with others / shared experiences	Trial offers and products/services that offer opportunities for self improvement / training
		Sport Indifferent	Raising awareness of the benefits of physical activity, exercise and sport	Trial offers and products/services promoting entry / beginner level options in a non –intimidating environment
Sport Atheists				



# ADULT SEGMENT PROFILES

# The segment opportunities for sport club membership

- The following slides will provide a summary of the 10 segments based on existing club membership and in order of their potential for sport club membership:

## Sport club members

### Segments of existing club members to increase/ maintain involvement

- Loyalists
- Socially Engaged

### Segments of existing club members where the focus is retention

- Sport Driven
- Apathetic Clubbers

## Non sport club members

### Segments of non club members with high potential for acquisition

- Sidelined Sportsters
- Club Wary
- Ponderers

### Segments of non club members with low potential for acquisition

- Self Focused
- Sport Indifferent
- Sport Atheists



## How the segments have been profiled

- The following slides will provide a summary of the 10 segments in terms of:

### Club members

- Pen profile of the segment (summary of the segment)
- What do they look like? (key demographics)
- What do they say about sport? (attitudes to sport and physical recreation)
- What physical activity are they currently doing? (participation in physical activity and sport)
- Their relationship to clubs? (attitudes and perceptions of clubs)
- How can we help them stay in sports clubs? (opportunities to encourage membership)
- Marketing to the segment? (what and how to talk to them)

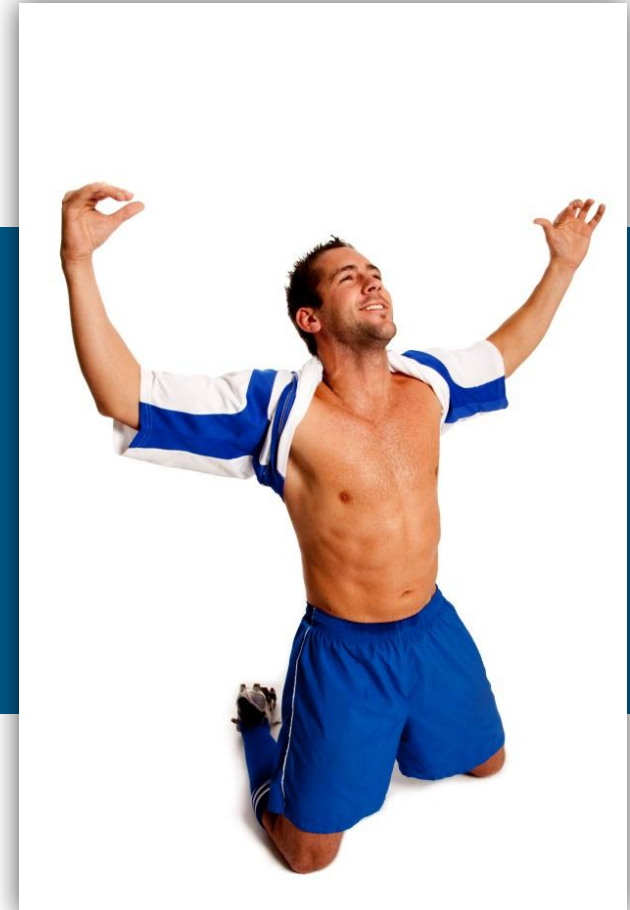
### Non club members

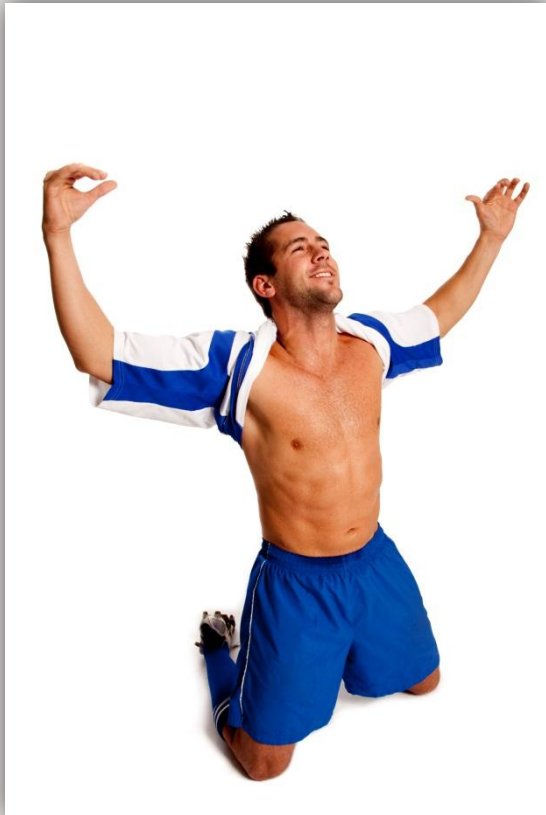
- Pen profile of the segment (summary of the segment)
- What do they look like? (key demographics)
- What do they say about sport? (attitudes to sport and physical recreation)
- What physical activity are they currently doing? (participation in physical activity and sport)
- What they say about clubs? (attitudes and perceptions of clubs)
- Their relationship to clubs? (potential for clubs - non club members only)
- Ideals for club or other sport participation? (opportunities to encourage membership)
- Marketing to the segment? (what and how to talk to them)



# SEGMENTS OF EXISTING CLUB MEMBERS

# Loyalists





## Pen Portrait

Less than 1 in 10 Australians are Loyalists. The Loyalists segment is made up of a high proportion of males under the age of 30 years, and comprises a particularly high proportion of teenagers.

For Loyalists, sport is their life. They enjoy all aspects of sport, including the competitive and social elements. Sport for the Loyalist provides a means to relax and have personal time. They derive confidence and a strong sense of achievement from participation, and are particularly motivated by competitive success. Loyalists are the most active of the segments, with the vast majority regularly participating in activities organised through sporting clubs. Loyalists typically participate in a range of individual and team based sports, and do so more than 4 times a week.

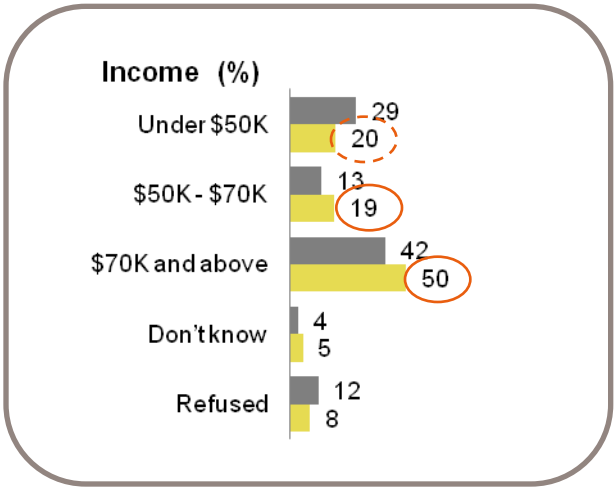
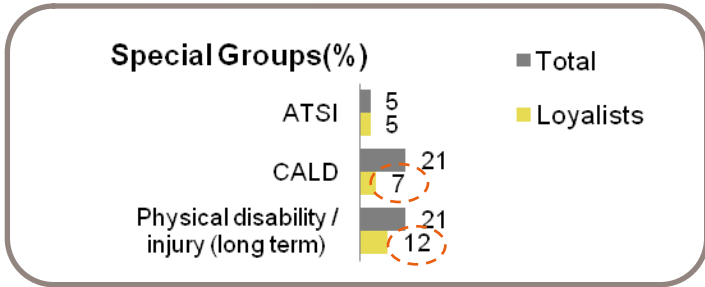
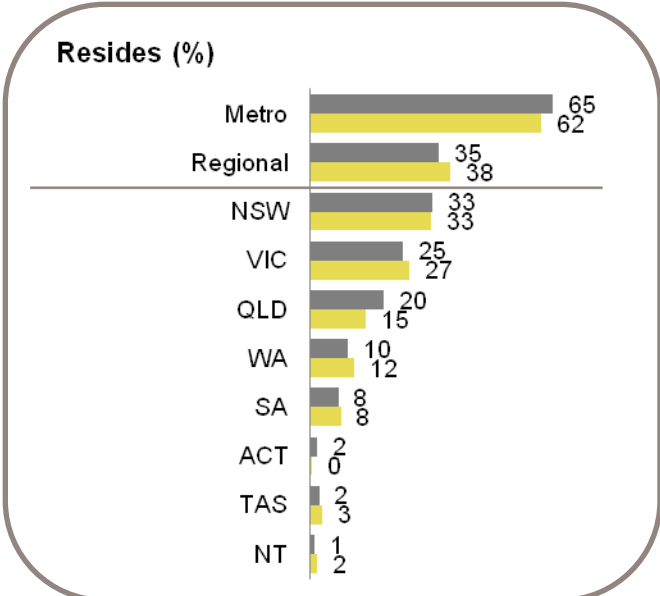
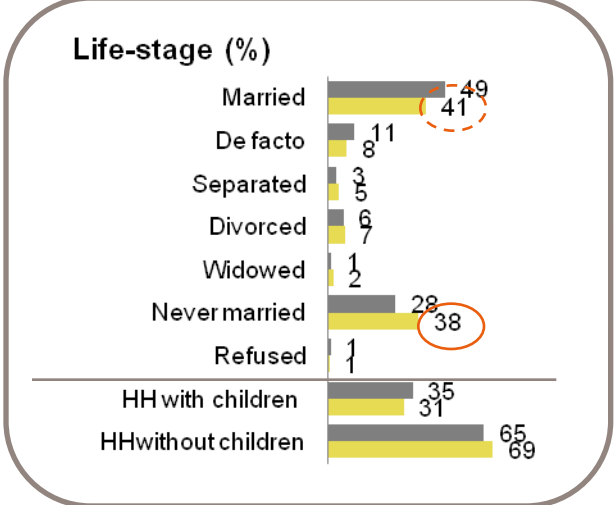
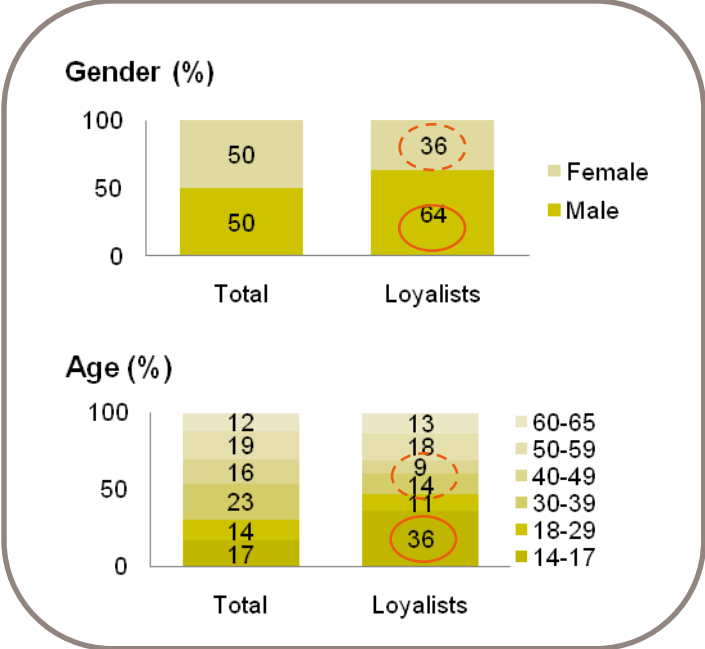
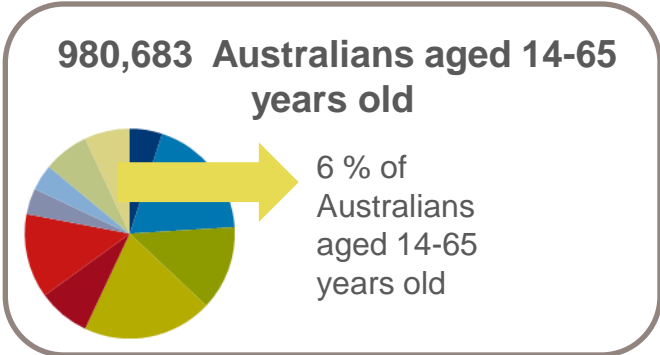
As Loyalists live for sports, it is almost an imperative for them to be part of a club. Members of this segment derive a strong sense of pride and belonging from club membership, and as a result few Loyalists see any aspects of clubs as a being a deterrent. Clubs provide Loyalists with a platform for personal/competitive success, an overall sense of achievement, and a valued social network.

The strategic goals for this segment are to increase/maintain involvement and retention. Because of their passion for sport, Loyalists are the easiest segment to engage. Loyalists are especially likely to be engaged by products, services and promotions that challenge their competitive spirit and provide them with new opportunities to advance their goals. A major challenge involves Loyalists transitioning to another segment once they graduate from high school.

# Loyalists

# What do they look like?

The Loyalists segment makes up under 1 in 10 Australians. They are more than likely to be male. There is a high proportion of teenagers within this segment.

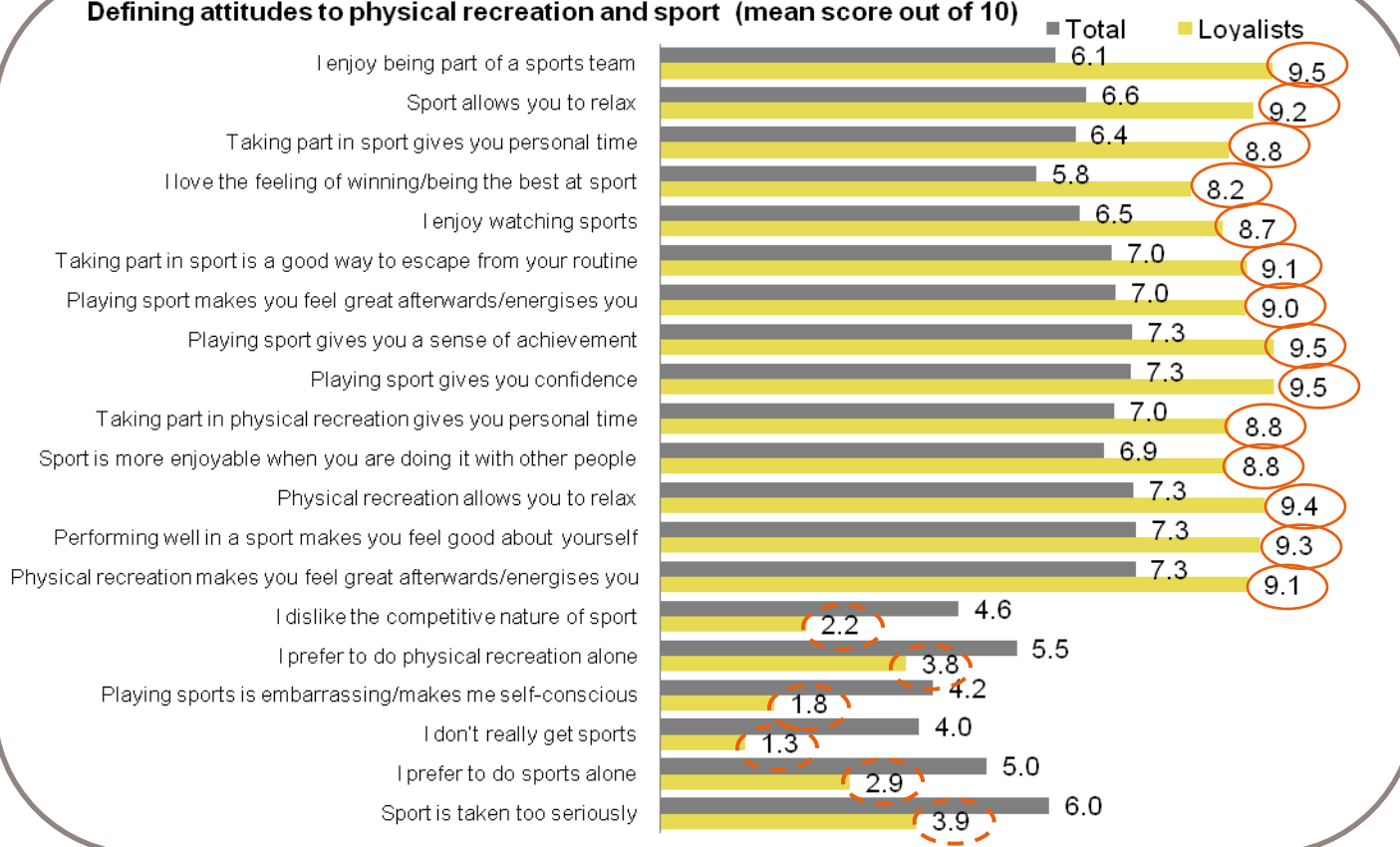


Adult Market Segmentation Study 2012: Total sample (n=3498) and Loyalists (n=210)



For Loyalists, sport is their life. They enjoy all aspects of sport, including the competitive and social elements. It is through sport that Loyalists are able to relax and have some personal time. They derive confidence and a strong sense of achievement from participation, and are particularly motivated by competitive success.

**Defining attitudes to physical recreation and sport (mean score out of 10)**



*"I just love my club and my football / netball / specific sport name). It's what I look forward to all week"*

*"I'm a Hawthorn Cit / 16 ft skiffo / (specific club identity)"*

*"My best friends are my team mates"*

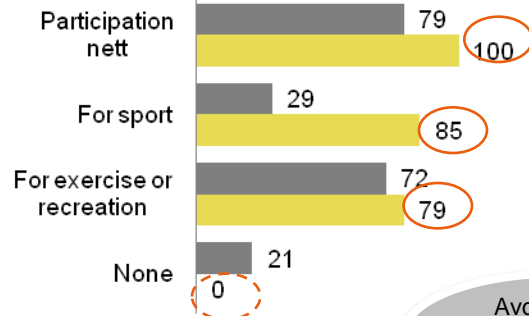
*"I love to win. There's nothing like that feeling you get when you play hard and win"*

# Loyalists

## What physical activity are they currently doing?

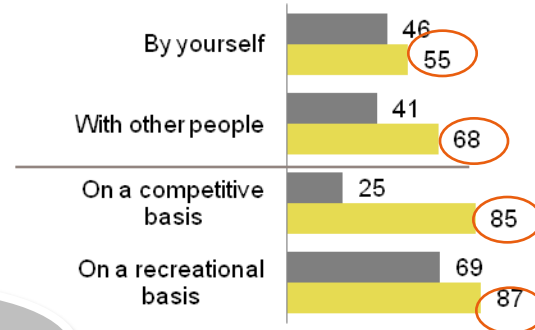
Loyalists are the most active of the segments, with the vast majority regularly participating in activities organised through sporting clubs. Loyalists typically participate in a range of individual and team based sports, and do so around 3 times a week. They are four times as likely to consider sport a main interest/hobby in life.

### Physical activity (%)



Avg. 4.9 per week vs. 3.3 total)

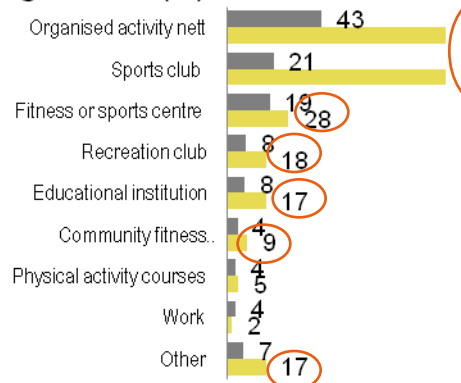
### How ? (%)



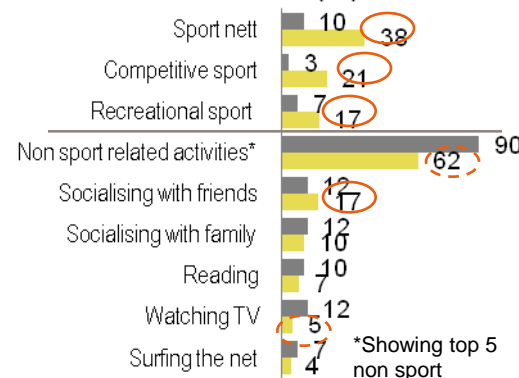
### What they do in clubs (%)

Australian Rules Football	15
Netball	12
Golf	11
Cricket (outdoor)	11
Soccer/Football (outdoor)	10
Basketball	7
Running	6
Athletics	6
Touch Football	5
Lawn Bowls	5
Tennis	5
Rugby League	4
Dance	4
Baseball/softball	4
Martial arts	3

### Organised ? (%)



### Main interests/ hobbies (%)



\*Showing top 5 non sport

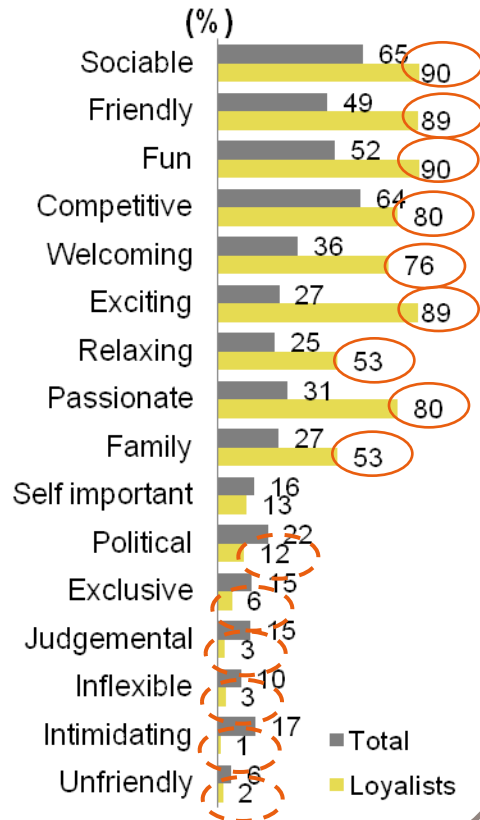
# Loyalists

# Their relationship with clubs?

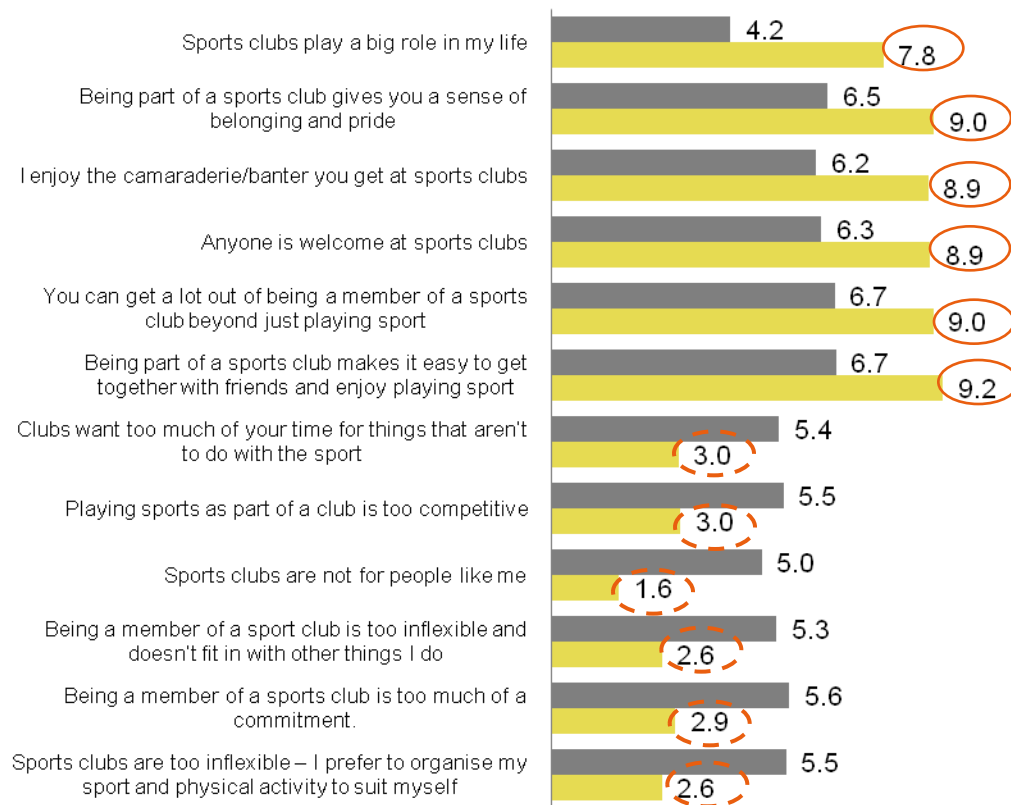
As Loyalists live for sports, it is almost an imperative for them to be part of a club. Members of this segment derive a strong sense of pride and belonging from club membership, and as a result few Loyalists see any aspects of clubs as a being a deterrent. Clubs provide Loyalists with a platform for personal/competitive success, an overall sense of achievement, and a valued social network.

**100% club members**

## Associations with clubs (%)

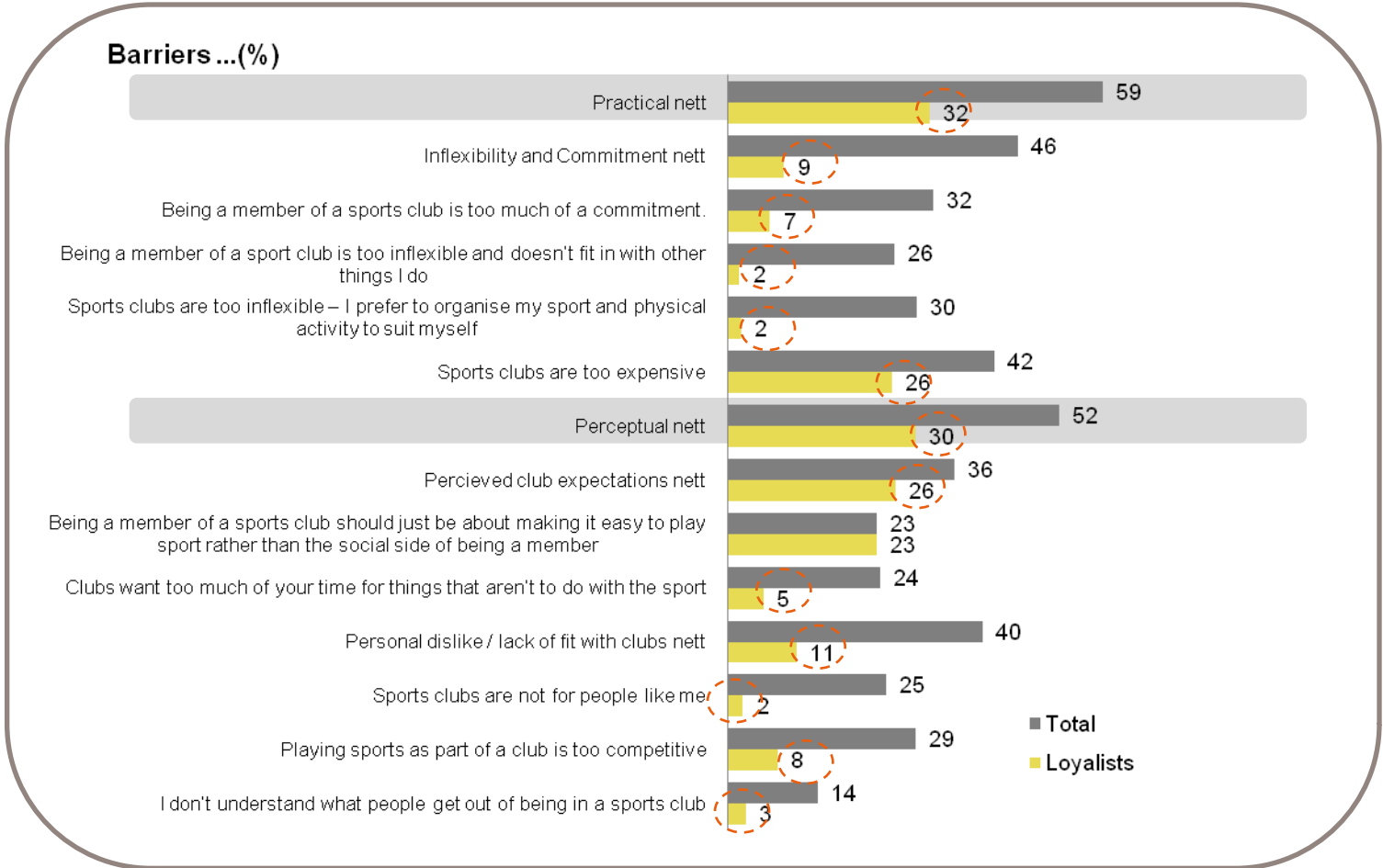


## Defining Club attitudes (mean score out of 10)





As mentioned, few view any barriers to their club membership however among those that do, practical elements of cost to participate in club-based sport could impact retention.



# Loyalists

# How can we help them stay in sports clubs?

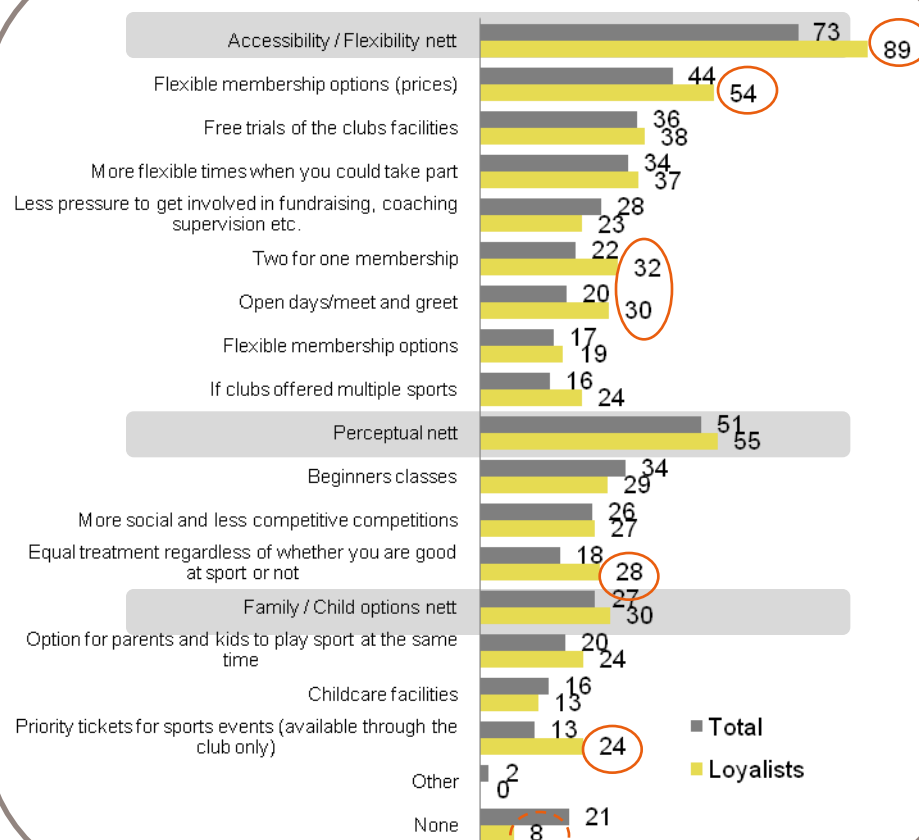
Increase involvement through free trials, more times / flexible times and opportunities to have greater involvement with different sports. Membership could be threatened as individuals reach a new life-stage with new commitments (family etc) so flexible membership options could be offered to accommodate changing life-styles.

### Main reasons for joining a club (%)

Showing top 10 reasons



### Potentially encouraged by...(%)



Respondents were asked if they wanted to do more sport. If so they were asked if they knew where to find out more.

Only 9% (n=18) of Loyalists were interested in doing more sport but did not know how to go about it. This indicates that Loyalists are active seekers of information when wanting to find clubs and information to fulfill their sporting needs.

# Marketing to the Loyalists

## What to talk to them about? (Products)

*Competitions / matches*

*Advanced streams / teams*

*Additional sports / challenges*

*Advanced training / coaching for  
skill advancement*

*Other ways to get involved to  
support the club*

*Flexible pricing / membership to  
retain membership if commitments  
/ life-stage changes*

## What to say? (Message areas)

*Be your best and play with the  
best*

*Challenge yourself*

*Push your boundaries*

*Be part of the team*

## How to say it? (Tone)

*Challenge / Assertive*

## Where

Within clubs

Where to look	Total %	Loyalist %
Internet	46	38
Local newspapers	21	26
Ask friends or family	20	25

Preferred means of contact	Total %	Loyalist %
Newspapers	39	45
Flyers in post-box	35	44
Email	31	40
Online/websites	37	40
Community notice boards	25	32
Sign on days at sports grounds	14	26
Radio/TV advertising	15	19
School/University notices/school newsletters	13	18
Local fairs and fates	11	11
Mobile (SMS/MMS)	5	9
Demonstrations	6	5

# Socially Engaged





## Pen Portrait

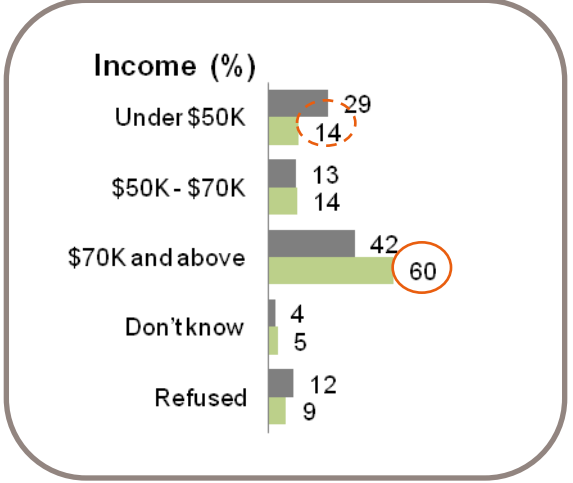
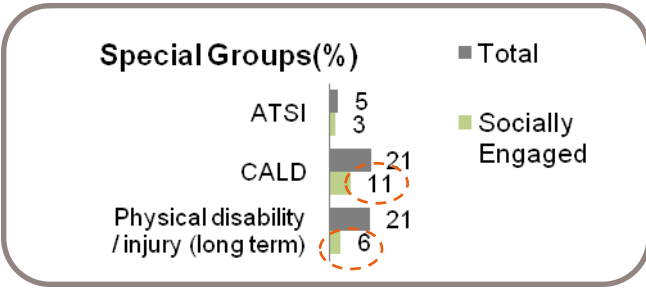
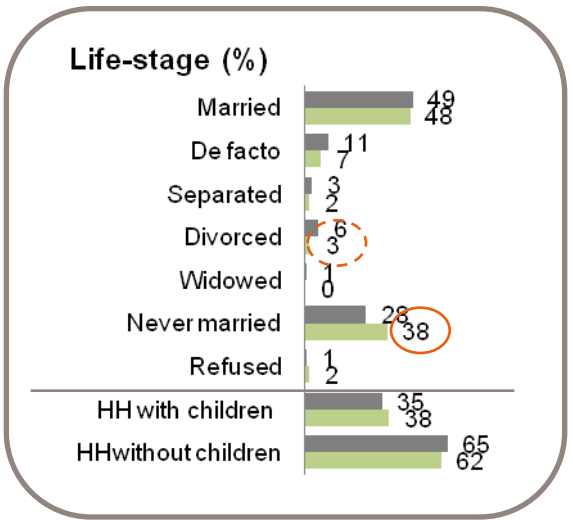
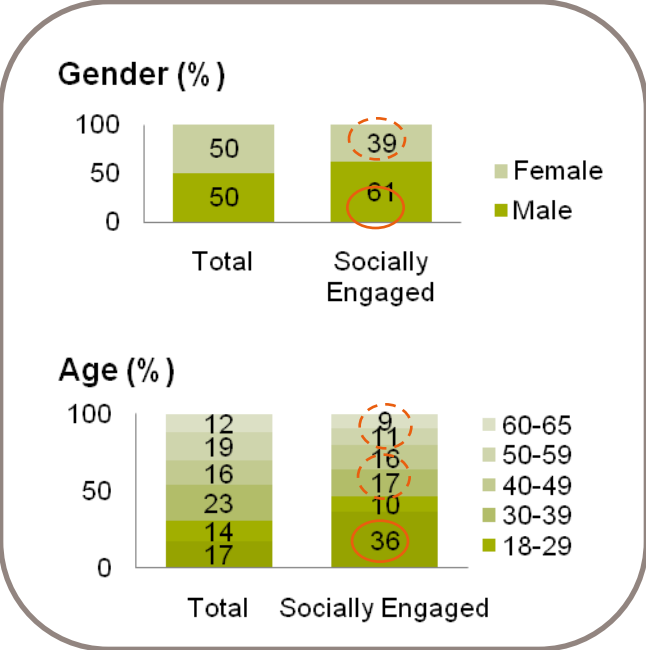
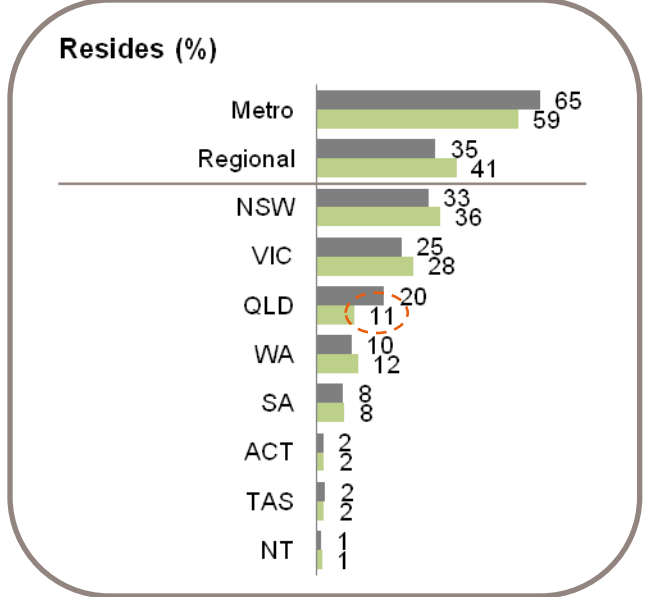
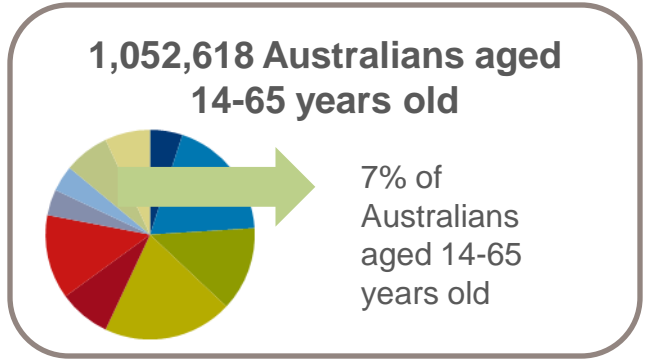
Less than 1 in 10 Australians are Socially Engaged. They are more likely to be males and with higher incomes in white collar jobs. The Socially Engaged are physically active and enjoy all aspects of sport but most of all the social aspect. They prefer to play sport with others and although they aren't averse to competition - it's more to do with challenging themselves while having fun. Sport gives them a sense of self achievement in a fun environment.

This is a very valuable segment as they are highly engaged with sport and clubs. The focus for this segment is on stretching and retaining membership. Promoting new or other sports / activities could also provide higher involvement given their social nature. This group can also be considered as influencers to attract new members. Additionally, membership or trial offers could be used to reward the Socially Engaged or encourage referrals. While the social aspects of clubs are important, the competition element should not be diminished.

Competition is an integral part of why they play sport and the context within which enjoyment and friendship sits. Along with Loyalists they form the core of club members. This segment starts to wane as they reach the 25-40 years age group when social, work and family commitments reach a peak. There is obvious risk to of losing these members as other commitments increase. It is imperative to keep this segment engaged as they have the potential to be more involved and be advocates for clubs.

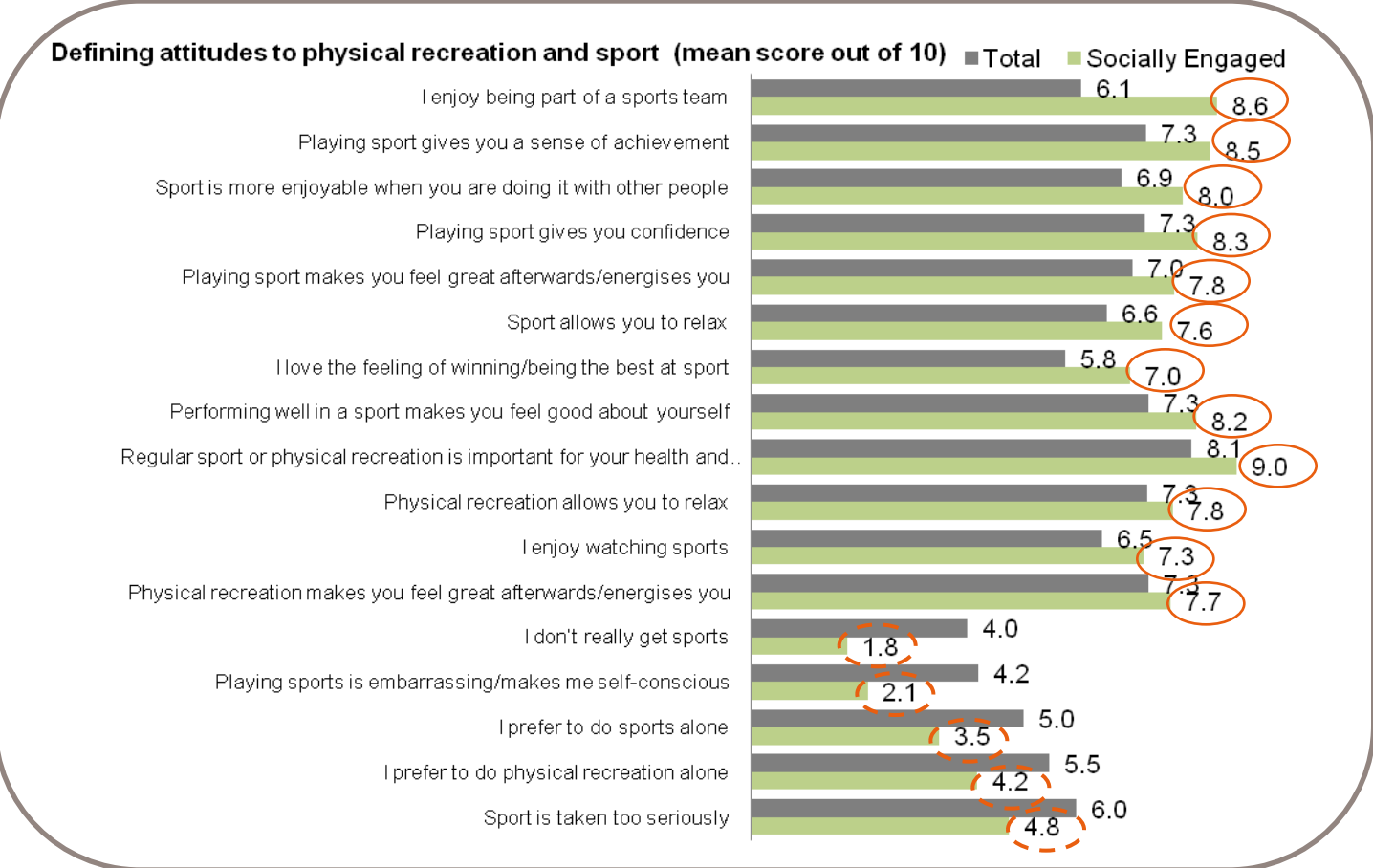
# Socially Engaged What do they look like?

The Socially Engaged make up less than 1 in 10 Australians. They are more likely to be males and with higher incomes.



# Socially Engaged What do they say about sport?

The Socially Engaged enjoy all aspects of sport but most of all the social aspect. They prefer to play sport with others and although they aren't adverse to competition, sport is more about being part of the team and the sense of personal achievement.



*"Having the club makes it easy for me and my friends to get together and enjoy playing a game together."*

*"It's the social element of my sport that I really like, and being part of a club makes that happen."*

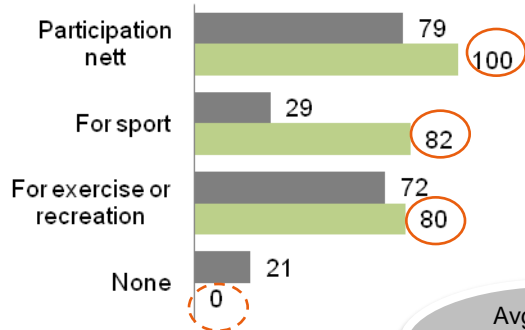
*"I like a bit of competition, but I really like playing my sport to have a laugh with my mates."*

# Socially Engaged

# What physical activity are they currently doing?

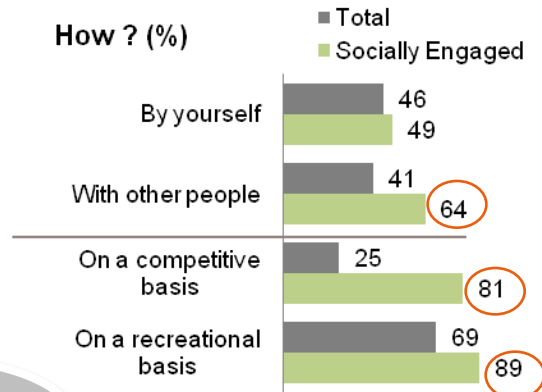
They are highly active in physical activity and sport, recreationally and competitively and the wide range of activities they participate in reflects this. The majority of their activity occurs within sports clubs or associations.

### Physical activity (%)



Avg. 3.7 per week vs. 3.3 total

### How ? (%)



### What they do in clubs (%)

Netball	17
Soccer/Football (outdoor)	17
Australian Rules Football	9
Golf	9
Cricket (outdoor)	8
Basketball	8
Tennis	7
Athletics	6
Martial arts	6
Lawn Bowls	5
Soccer/Football (indoor)	4
Gym – take classes	4
Touch Football	4
Dance	3
Rugby Union	3
Running	3

### Organised ? (%)



### Main interests/ hobbies (%)



\*Showing top 5 non sport

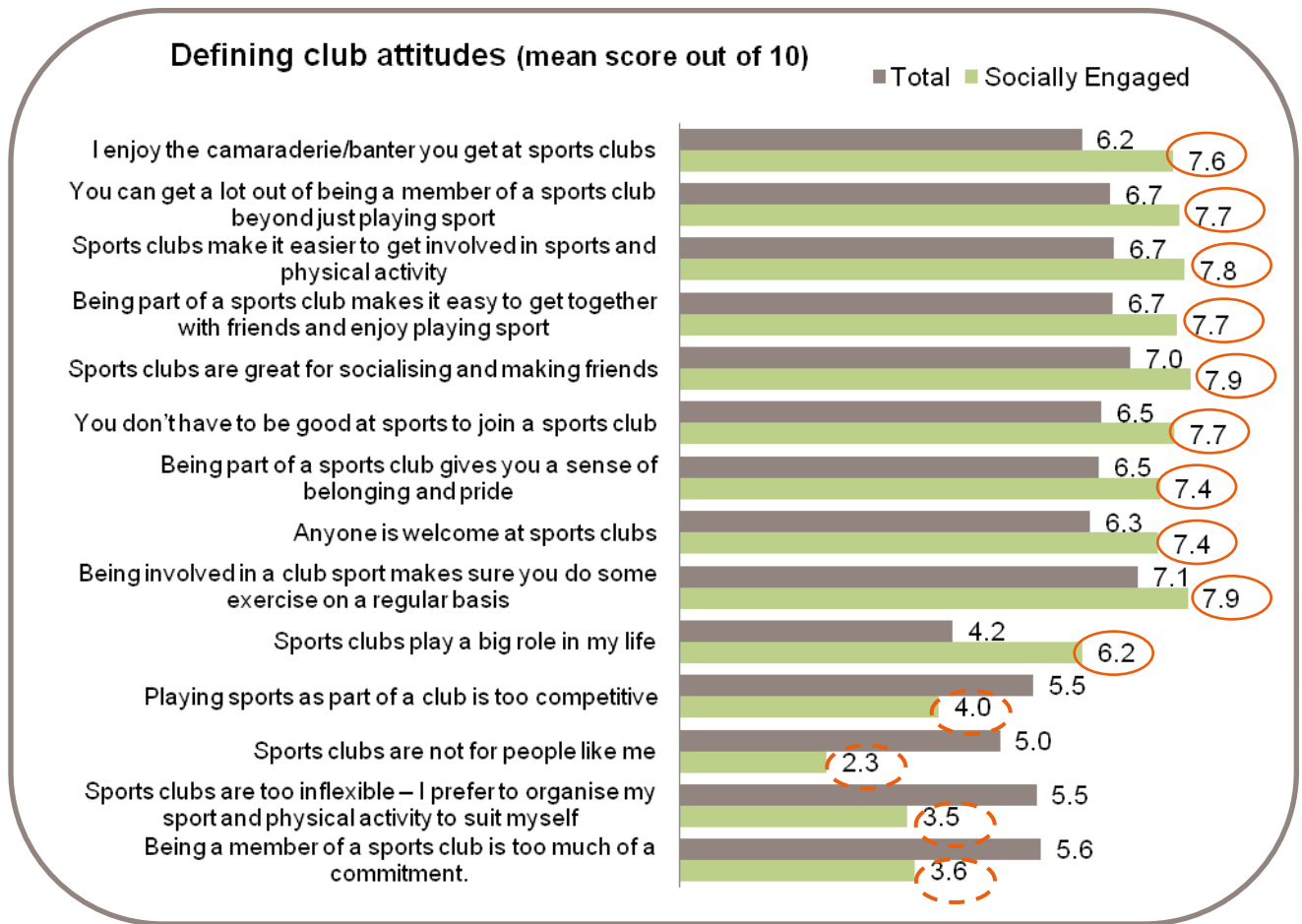
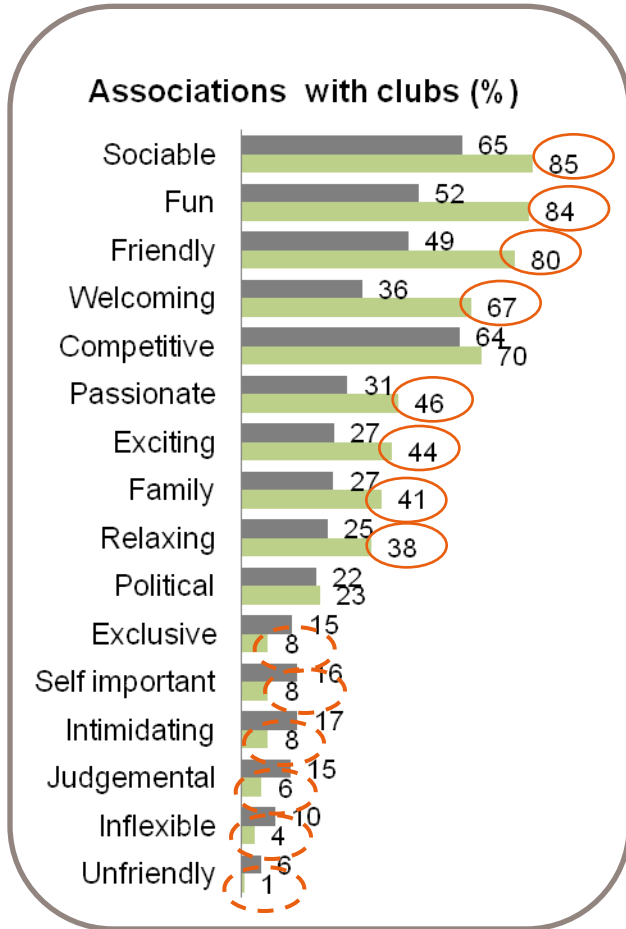


# Socially Engaged

# Their relationship with clubs?

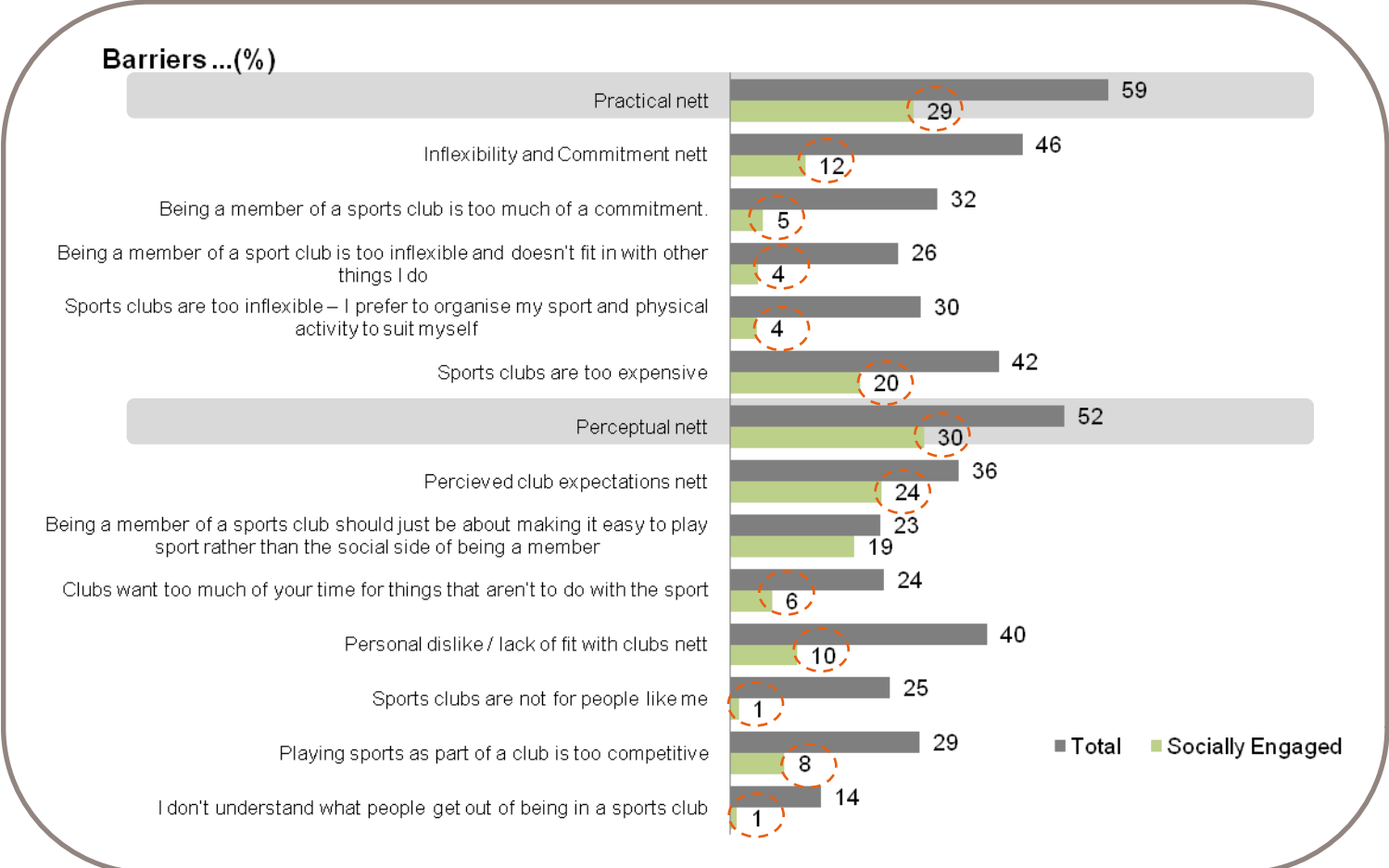
Most of all, the Socially Engaged enjoys the social aspects of clubs. Encouragingly they see clubs as providing a place from which they get more than just 'doing sports' but also a way to make friends, motivate them to stay fit and self improvement – and they aren't afraid of a little competition. Unlike some segments, they don't struggle with fitting clubs into their life on any level. Two thirds have been a member for most of their lives.

**100% club members**





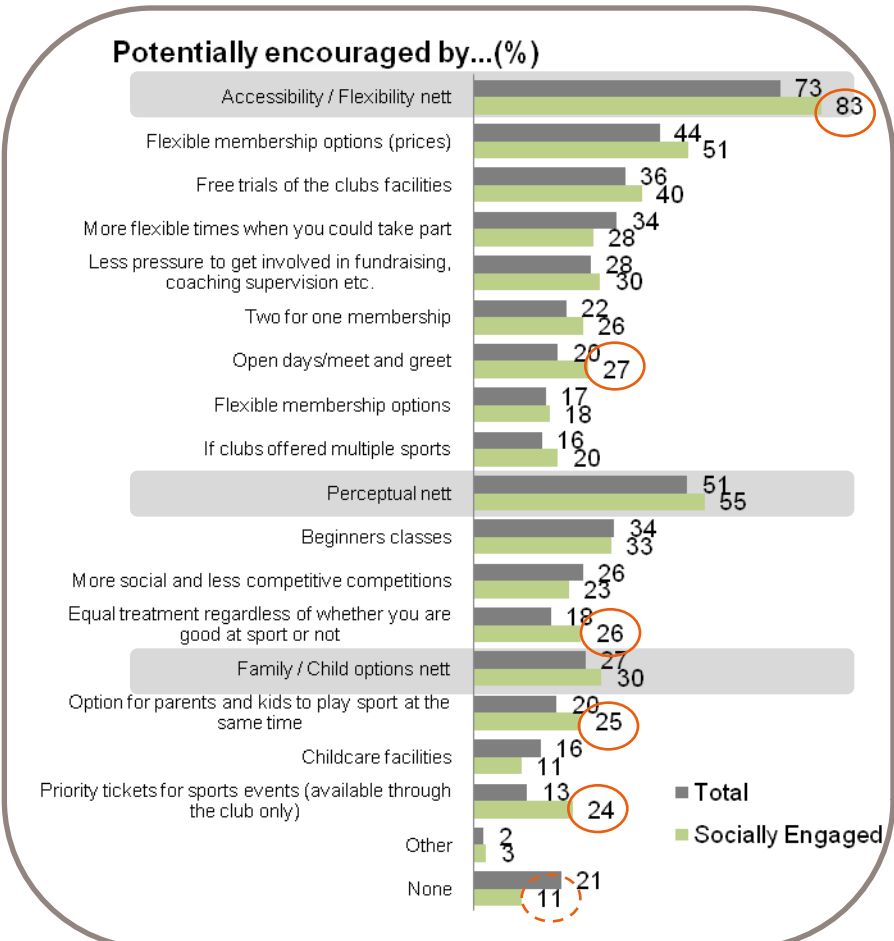
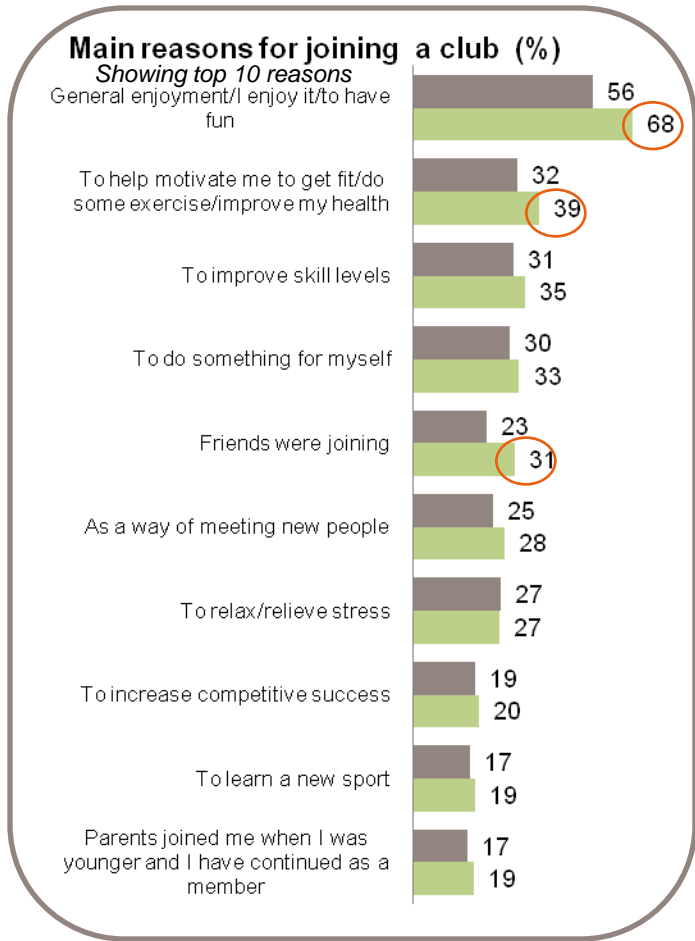
As such the Socially Engaged are less likely to view any barriers to club membership however among those that do, practical elements of cost to participate in club-based sport and perceived competitiveness could impact retention.



# Socially Engaged

# How can we help them stay in sports clubs?

Given the very positive disposition towards clubs, ensure clubs focus on the social aspects of club membership. This group could be advocates and influential in attracting new members, via rewards for referrals or bring a friend opportunities. Similarly, as this segment approaches a different life stage, there will need to be flexible membership offers and schedules to maintain membership renewal as priorities change.



Respondents were asked if they wanted to do more sport. If so they were asked if they knew where to find out more. Only 6% (n=13) of the Socially Engaged were interested in doing more sport but did not know how to go about it. This indicates that the Socially Engaged are confident they can find where to go when wanting to find clubs and information to fulfil their sporting needs.

# Marketing to the Socially Engaged

## What to talk to them about? (Products)

*Rewards for membership / referrals / bring a friend*

*New sports / activities*

*Other ways to get involved to support the club as commitments change*

*Flexible pricing / membership to retain membership if commitments / life-stage changes*

## What to say? (Message areas)

*Camaraderie – get together for friends / others in your favourite sports*

*Promote social aspects but in the context of competitive sport*

*Be part of something that lets you be active with friends*

## How to say it? (Tone)

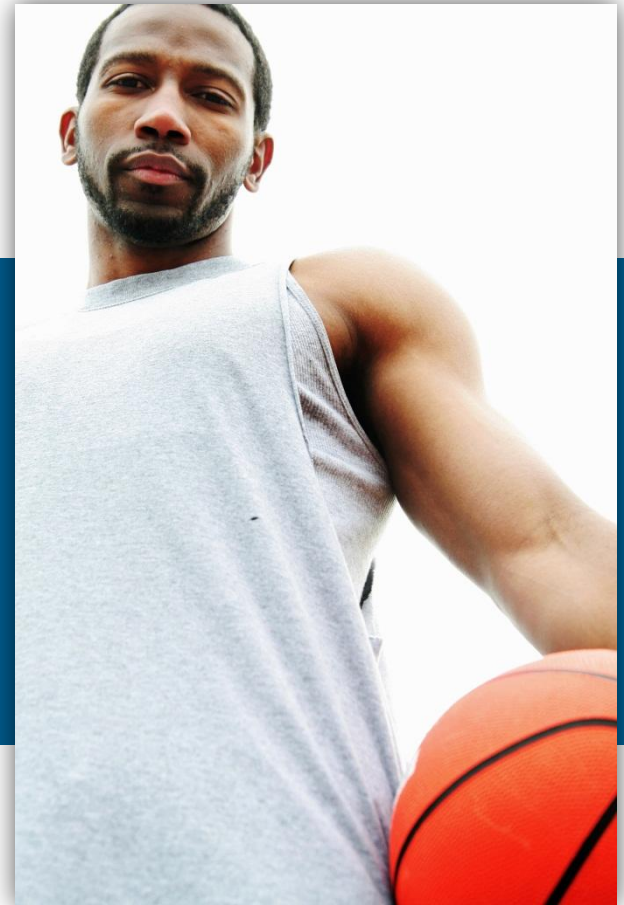
*Challenging but fun*

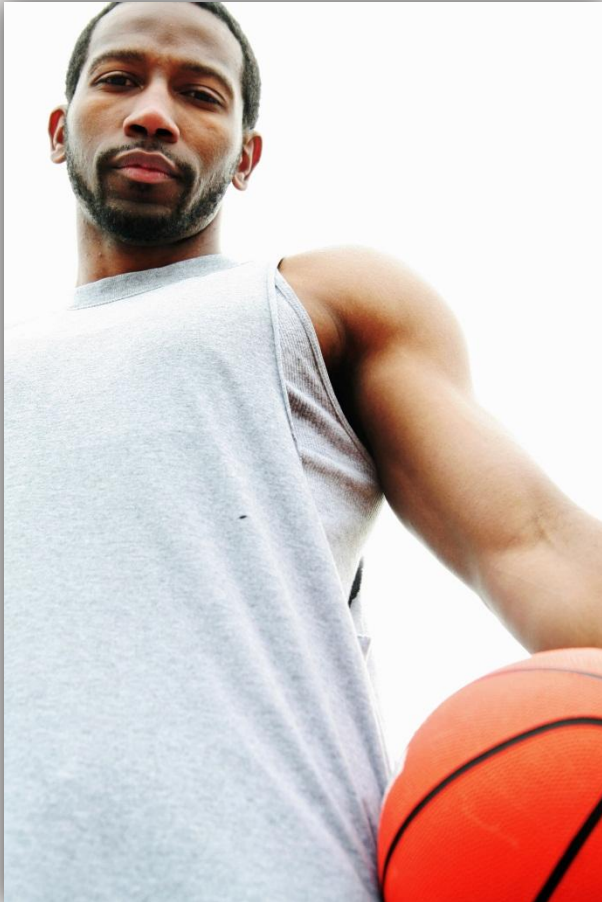
## Where

Within clubs and via other members

Where to look	Total %	Socially Engaged %
Internet	46	39
Ask friends or family	20	37
Local newspapers	21	14
Preferred means of contact	Total %	Socially Engaged %
Email	31	47
Online/websites	37	44
Newspapers	39	43
Flyers in post-box	35	34
Community notice boards	25	25
Sign on days at sports grounds	14	23
School/University notices/school newsletters	13	23
Radio/TV advertising	15	15
Mobile (SMS/MMS)	5	11
Local fairs and fates	11	9
Demonstrations	6	7

# Sport Driven





## Pen Portrait

'Sport Driven' club members do a lot of physical activity but keep their social activity within the club to a minimum. This segment is often younger, wealthier urbanites and with a high proportion from CALD backgrounds. Their motivation for doing sport tends to be more personal and focused on self improvement and the sheer enjoyment of it. The Sport Driven are less invested in the wider club experience for a variety of reasons. The club is a place for them to access facilities and participate in their sport – but they don't necessarily want involvement beyond that.

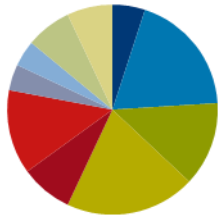
While still enjoying the competition, they are less fanatical about sport and less competitive than some of their club counterparts. They can feel that sports clubs are overly competitive, inflexible and too demanding of their time when really they just want to use the facilities to play sport and keep other elements of the club at arms length.

The Sport Driven can be at a very busy life stage, meaning they are often balancing membership with commitments of family life, work and other interests. While they appreciate the camaraderie and the opportunity to get together with friends that clubs offer, it is the sport rather than the social aspects of clubs that are paramount. This may be as much about other competing interests for their time as it is about them being less sociable. Their relationship with clubs is less assured. The threat here is that they may move to the non club segments so the challenge is to keep them engaged and provide ways to help them fit club membership in their lives.



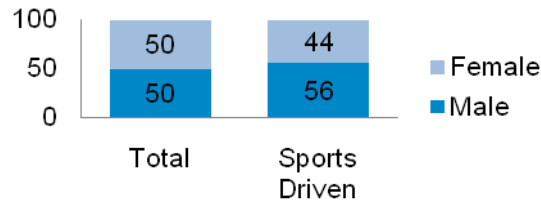
Sport Driven make up less than 1 in 20 Australians. They are often younger, wealthier urbanites and with a high proportion from CALD backgrounds.

**583,186 Australians aged 14-65 years old**

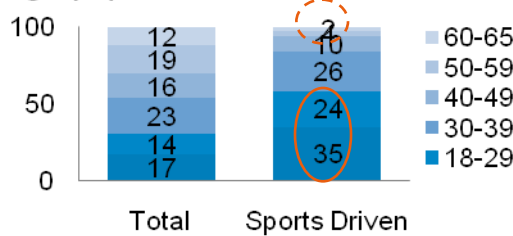


4% of Australians aged 14-65 years old

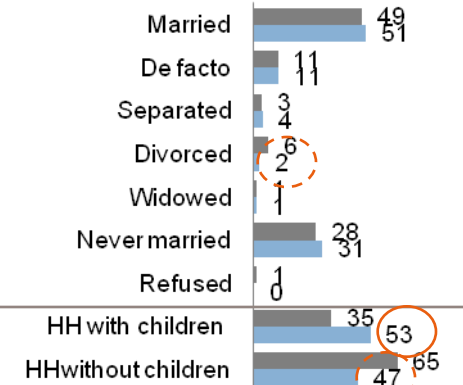
**Gender (%)**



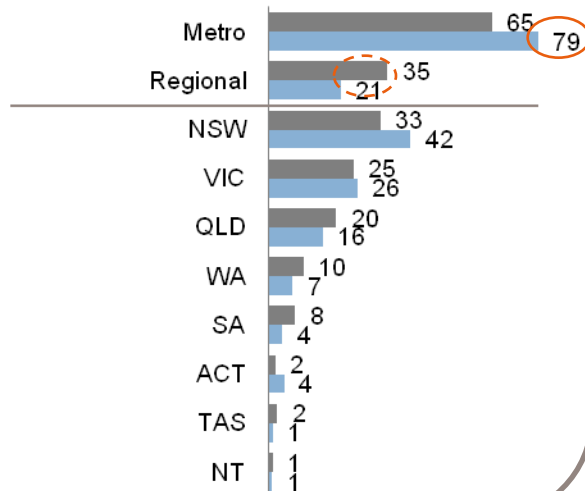
**Age (%)**



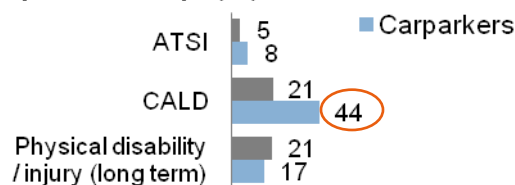
**Life-stage (%)**



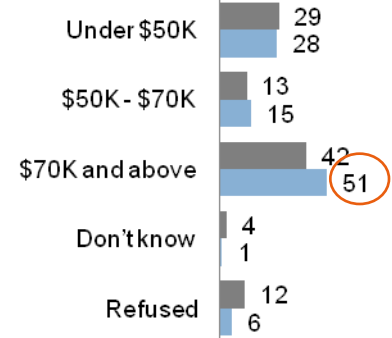
**Resides (%)**



**Special Groups (%)**

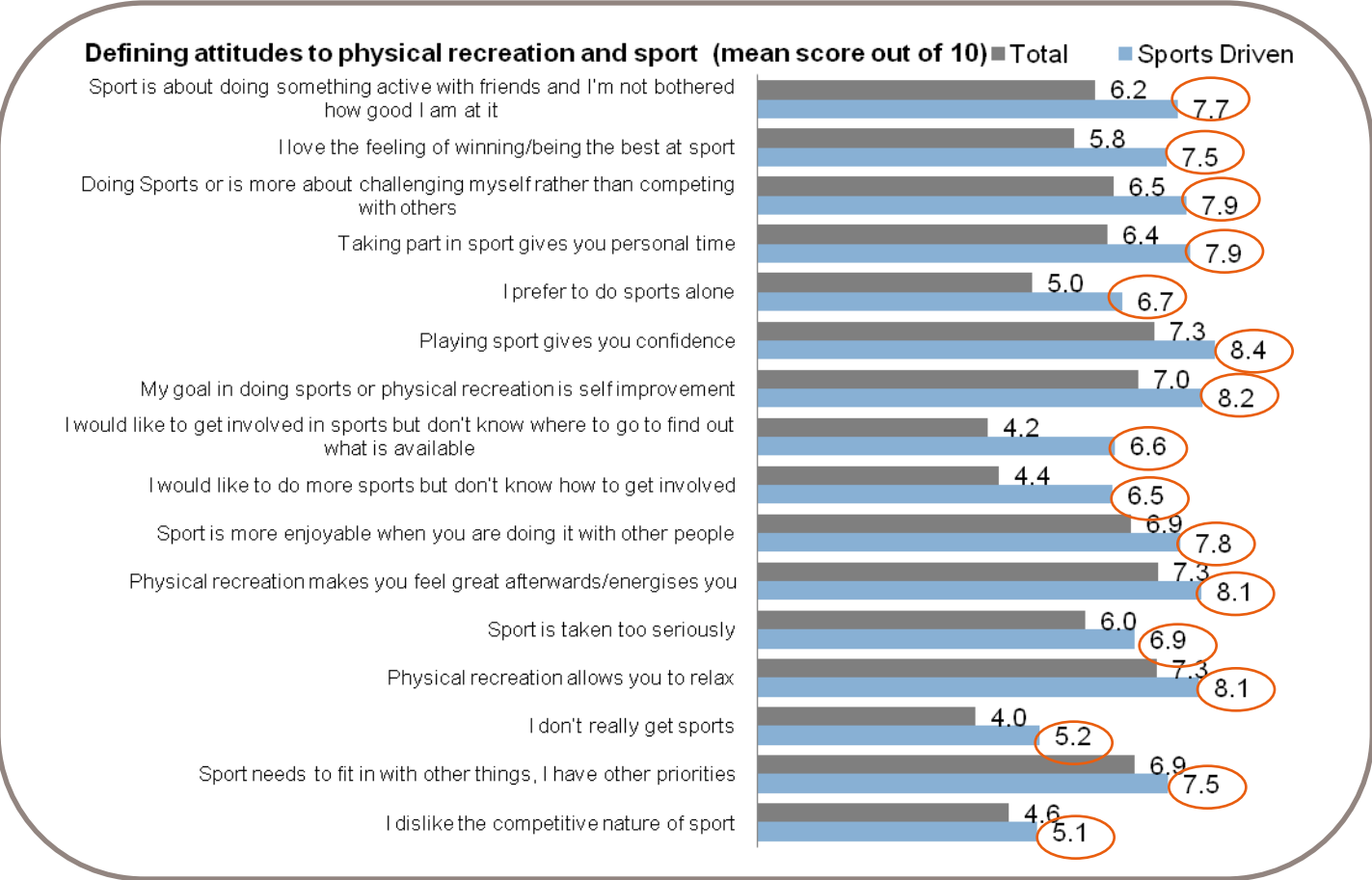


**Income (%)**





Sport Driven are very positive about sport, but the benefits are seen to be more personal and recreational vs. competitive. It is about having fun, challenging themselves, and / or self improvement. While they don't want the full club social immersion, they do enjoy the social element of playing sport as it allows them to be active with friends.



*"I'm a member of a club so I can play my sport easily rather than the social side of being a member."*

*"I just want to use the facilities at clubs so I can play sport with my friends rather than get involved in everything else."*

*"I don't engage much with my club beyond using the facilities."*

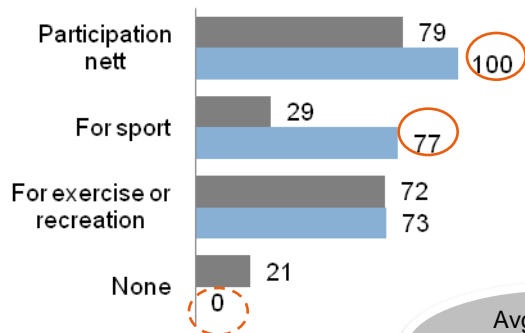
*"It's playing my sport that gives me the greatest benefit, not being a member of a club."*





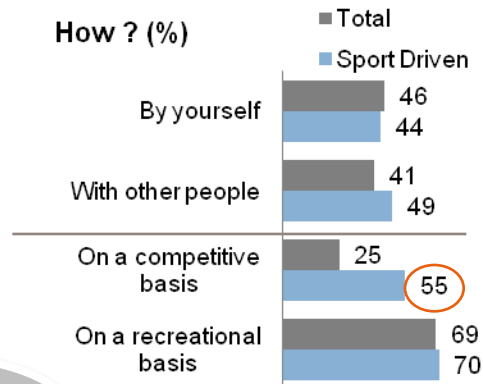
Sport Driven are highly active in both sport and recreational physical activity. They are likely to participate in organised activities within sport clubs as well as in other organisations such as fitness or leisure centres. They participate in a range of team and individual based activities.

**Physical activity (%)**



Avg. 2.6 per week vs. 3.3 total

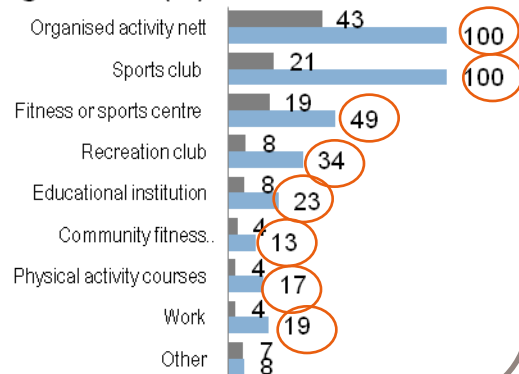
**How ? (%)**



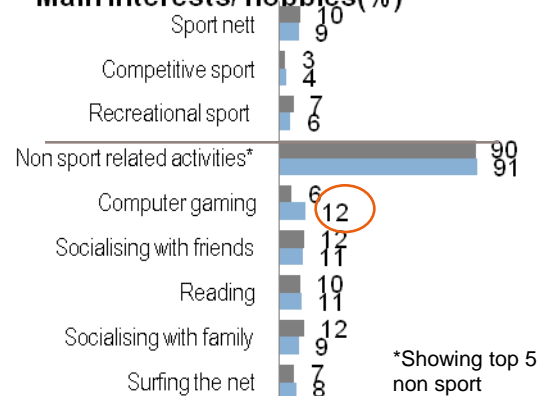
**What they do in clubs (%)**

Athletics	18
Cricket (outdoor)	11
Basketball	11
Australian Rules Football	11
Baseball/softball	10
Martial arts	10
Swimming	9
Cycling	8
Soccer/Football (outdoor)	8
Netball	7
Tennis	6
Running	6

**Organised ? (%)**



**Main interests/ hobbies (%)**



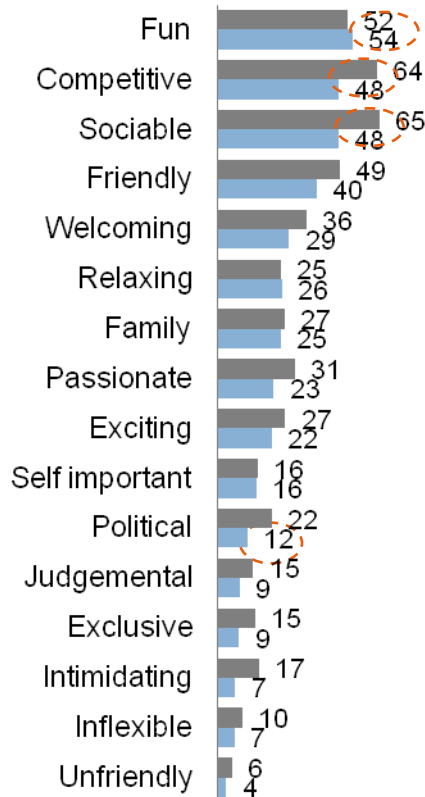
\*Showing top 5 non sport



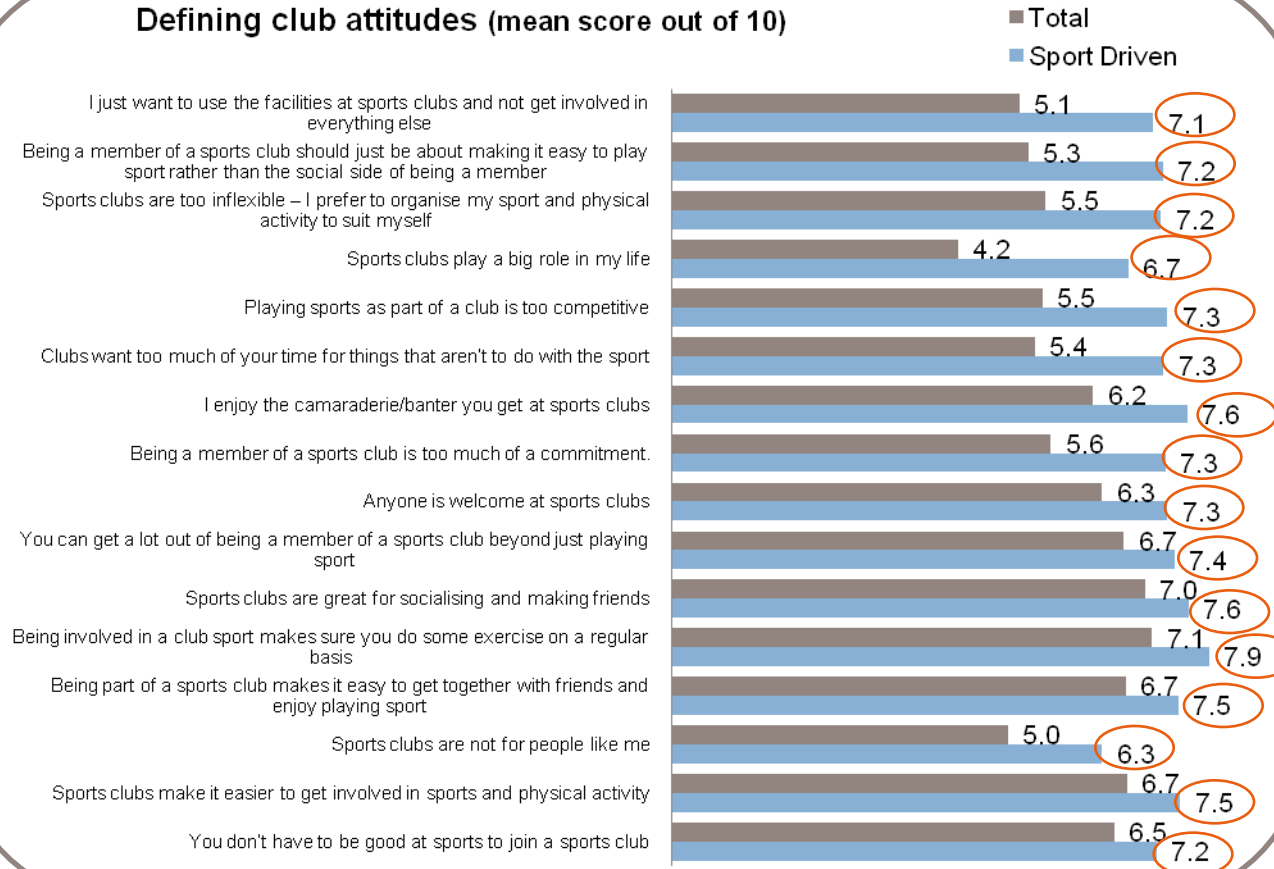
Sport Driven are current club members and generally have positive attitudes about clubs. However, these attitudes tend to be driven by the facilities clubs provide rather than other benefits. They also appear to see clubs to be somewhat inflexible and requiring too much commitment. Costs to participate in club-based sport are also a consideration. There is also some sense that club sports are 'too competitive'.

100% club members

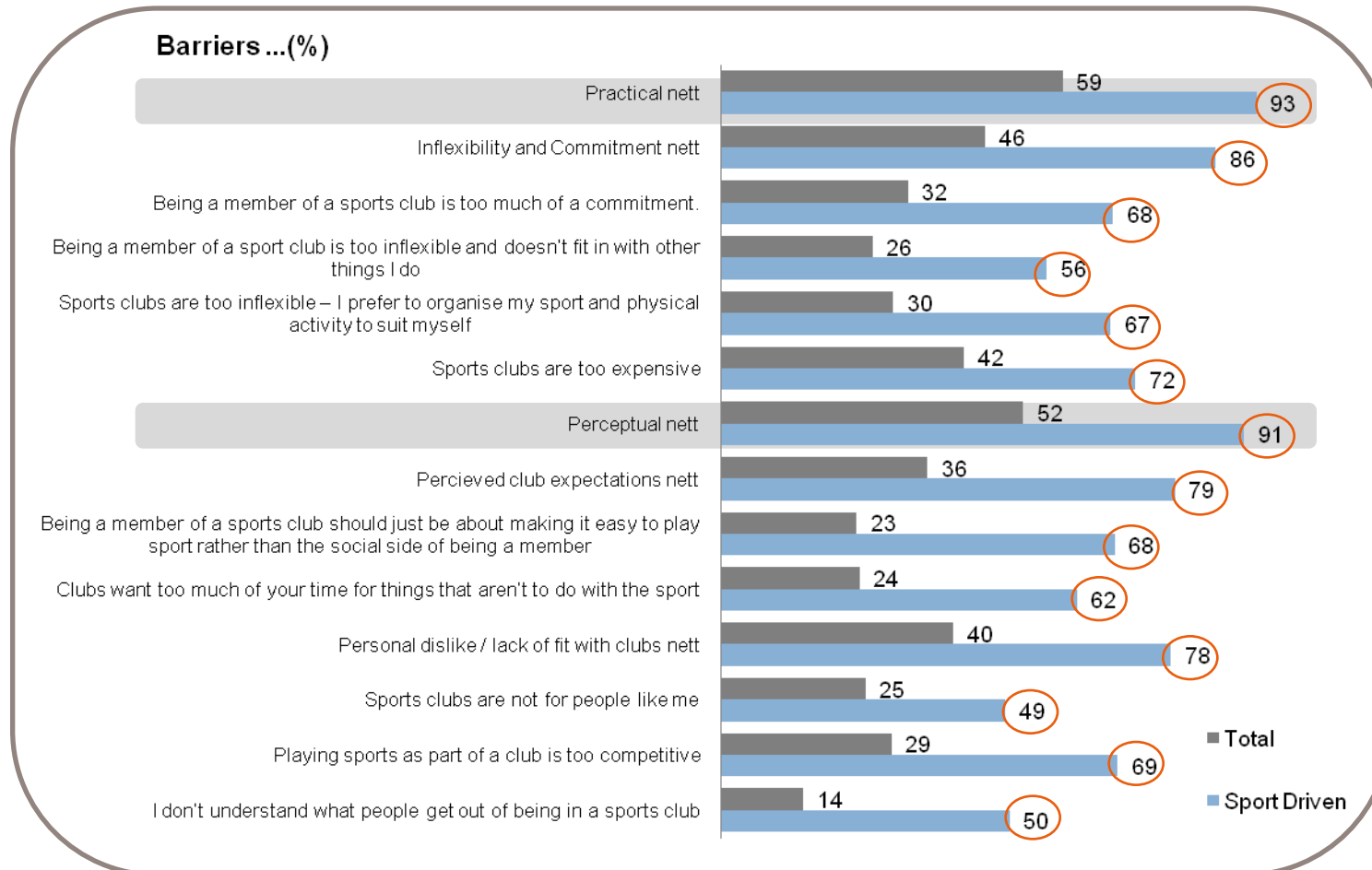
### Associations with clubs (%)



### Defining club attitudes (mean score out of 10)



Despite being club members, there can be practical barriers keeping Sport Driven as members – namely the commitment aspect and cost to participate in club-based sport. They also hold the perception that club sports are ‘too competitive’ and put too much emphasis on the social aspect.





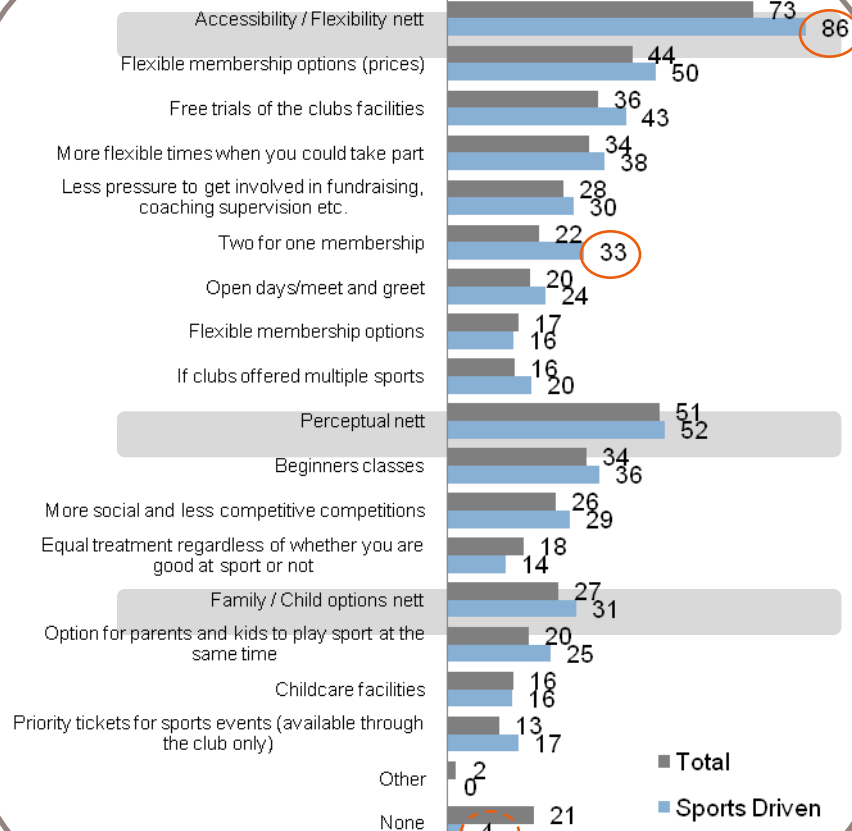
To encourage club membership renewal, ensure flexibility so they can work around their own schedules and consider different pricing options. Focus on 'enjoyment' and ability to stay active and be part of a team without too much focus on competition or being a 'pro'. A range of activities can appeal.

**Main reasons for joining a club (%)**

Showing top 10 reasons



**Potentially encouraged by...(%)**



**What they'd like to do more of if they knew where to go to do it (65% of Sport Driven) (those that want to do more sports (n=72) (%)**

Cycling	24
Walking	24
Swimming	18
Dance	15
Tennis	15
Basketball	15
Australian Rules Football	15
Bushwalking	14
Yoga	14
Golf	12
Cricket (outdoor)	11
Gym – as an individual	11
Boxing	11
Soccer/Football (outdoor)	10

## What to talk to them about? (Products)

*Flexible times and schedules*

*Team sports*

*Friend and family membership*

*Different class / team for all levels*

*Participation or loyalty incentives*

## What to say? (Message areas)

*It's all about the 'sport'*

*Quality and access of facilities*

*Clubs can help you achieve your personal fitness / sports goals*

*Acknowledge busy lifestyle and reassure they do not need to be involved in the club beyond 'playing the sport'*

## How to say it? (Tone)

*Energetic and Positive*

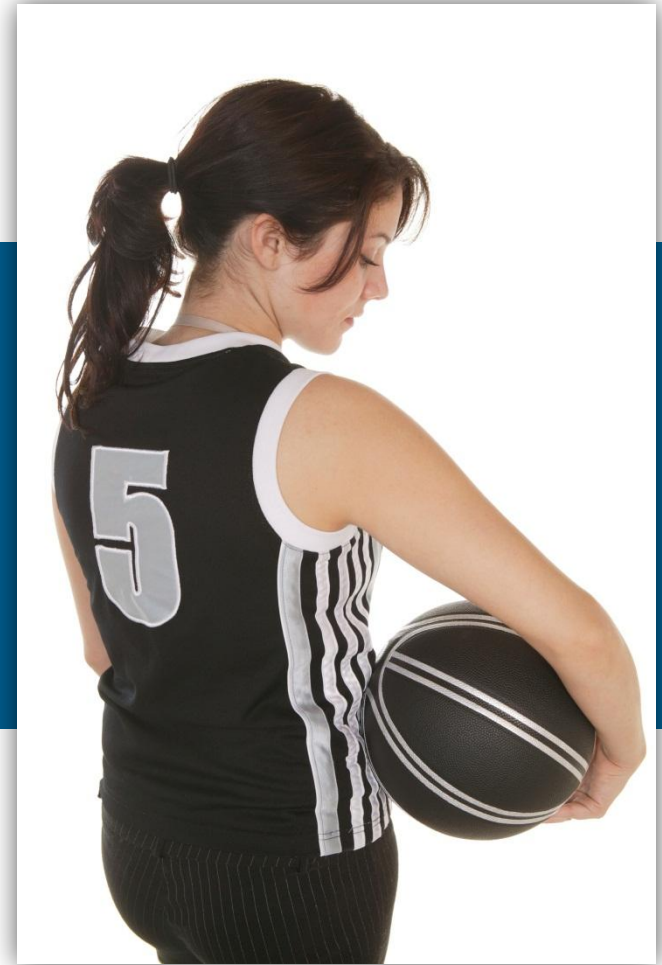
## Where

Within clubs

Where to look	Total %	Sport Driven %
Internet	46	51
Local newspapers	21	24
Ask friends or family	20	11

Preferred means of contact	Total %	Sport Driven %
Online/websites	37	36
Newspapers	39	35
Email	31	30
Flyers in post-box	35	28
School/University notices/school newsletters	13	22
Community notice boards	25	21
Radio/TV advertising	15	18
Mobile phone call	3	15
Sign on days at sports grounds	14	13
Local fairs and fates	11	13

# Apathetic Clubbers





## Pen Portrait

The Apathetic Clubber segment makes up nearly 1 in 20 Australians. They are more likely to be male. While Apathetic Clubbers can be found within all age groups, there is a significantly higher proportion of teenagers to be found in this segment.

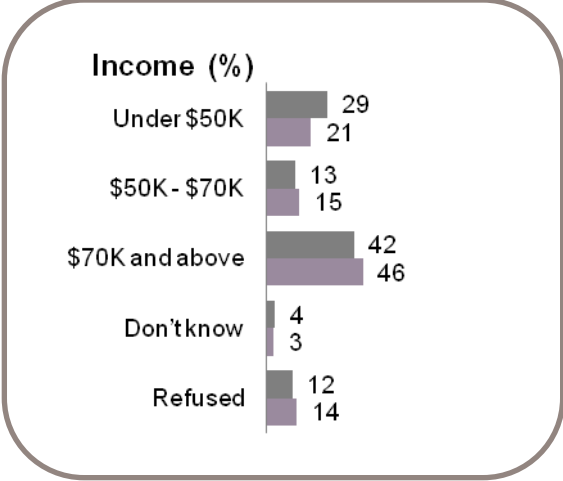
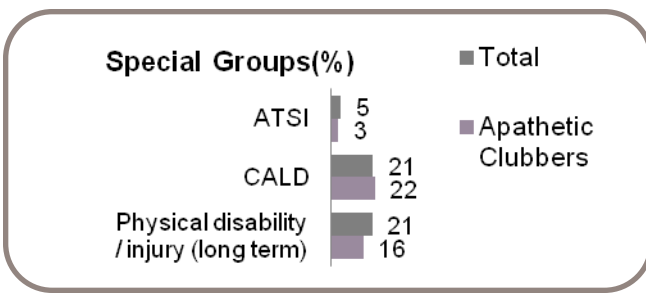
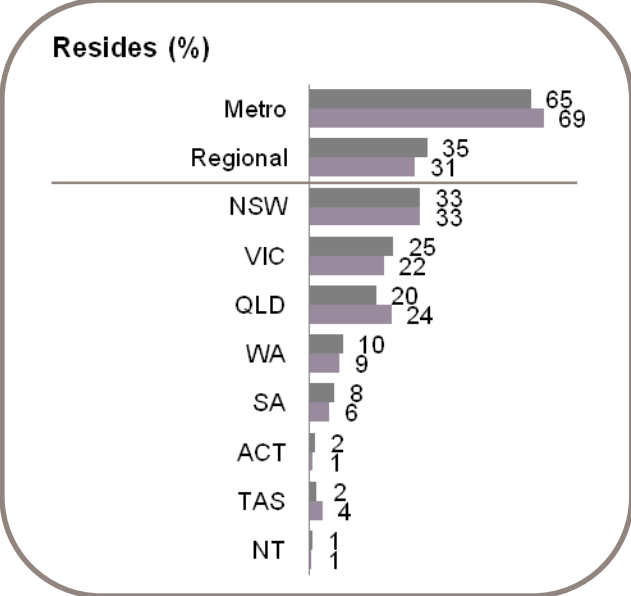
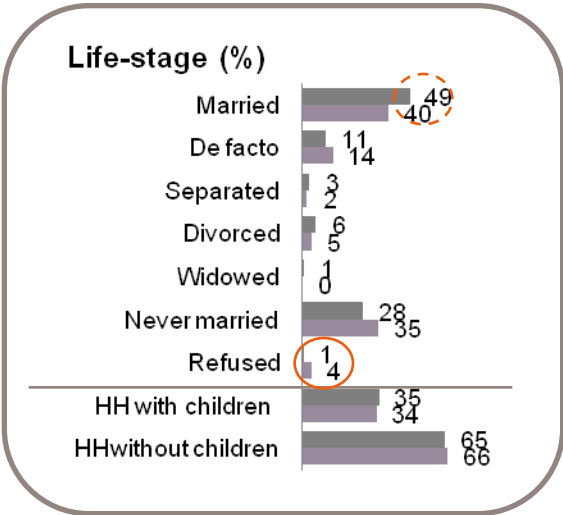
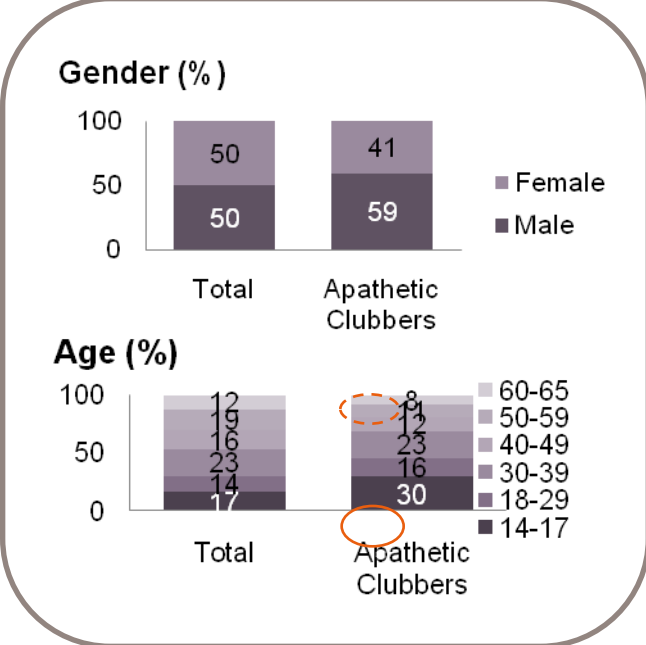
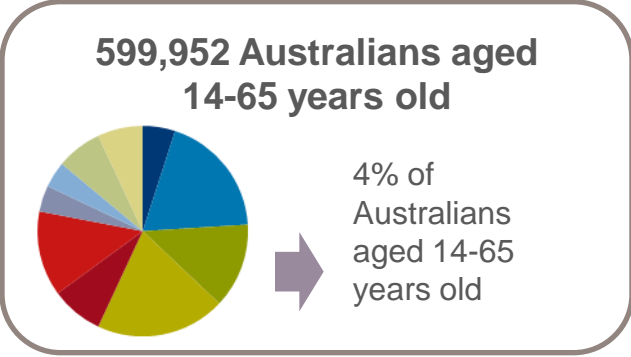
Despite being highly active in both sport and physical recreation this segment is somewhat apathetic in their attitudes towards sport and clubs. They don't like competition and are less likely than other club segments to feel very positive toward sport or clubs. They may be more likely to view sports as a 'chore' or something they do out of habit rather than passion.

Relative to other club member segments they tend to find value in clubs for their 'facilities' and that it encourages you to do exercise, rather than the elements of competitiveness and socialising. Some feel a pressure that you need to be good at sport to be part of a club. While they initially enjoyed their membership, this appears to be waning.

This segment would benefit from feeling less pressured to be good at the sport to continue enjoying it. There needs to be a focus on ease of 'entry' in terms of ensuring everyone feels they can join /participate regardless of skill level or motivation. There may be a need to promote the social and fun aspects of clubs to reinvigorate this segment who are at risk of dropping out if there is a change to their circumstances given their somewhat apathetic attitude.



The Apathetic Clubbers segment makes up nearly 1 in 20 Australians. They are more likely to be male and while this segment can be found within all age groups, there is a significantly higher proportion of teenagers to be found in this segment. They predominantly reside in metropolitan Australia reflecting the typical population split of metro / regional.

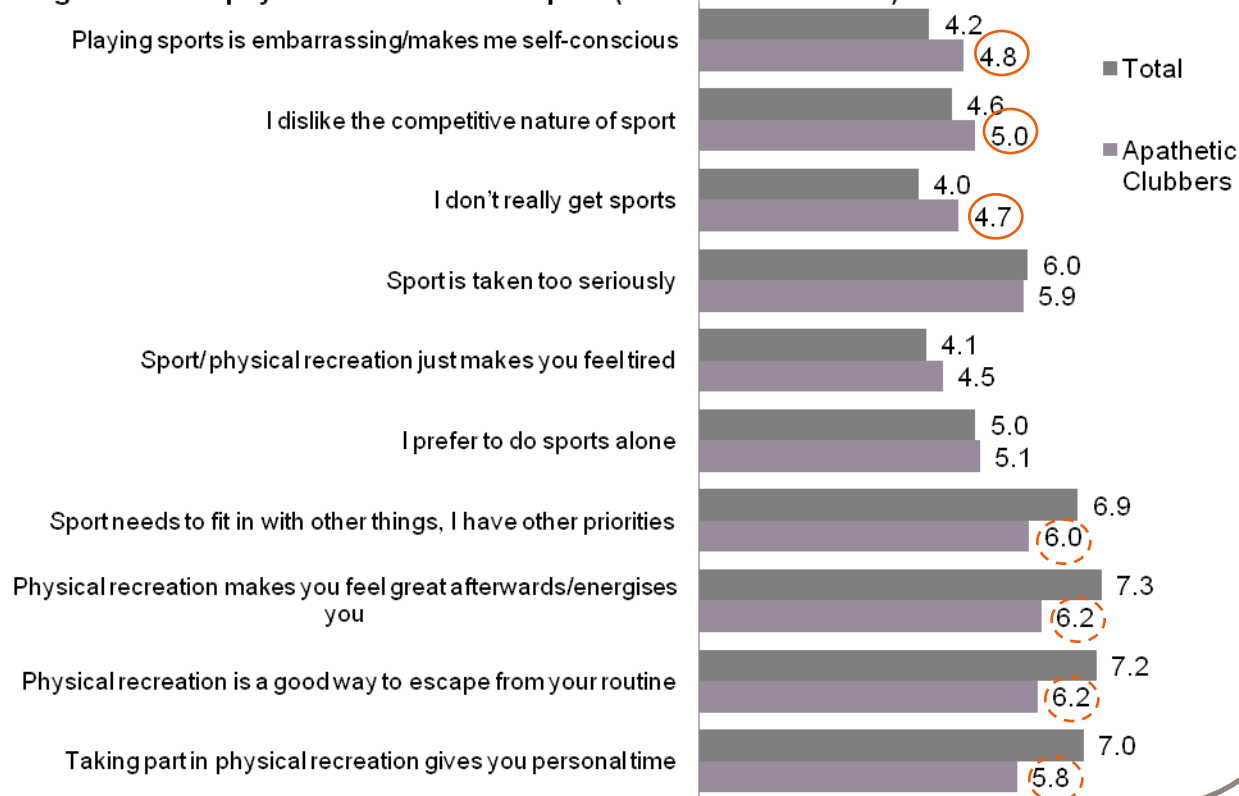






This segment appears to be somewhat apathetic, towards physical activity and sports. They don't like competition but they can associate sports with positive personal benefits. That said, compared to other active segments, they may be more likely to view sports as a 'chore'.

### Defining attitudes to physical recreation and sport (mean score out of 10)



*"Playing sport isn't as fun as it used to be"*

*"It's just too competitive, everyone takes it so seriously"*

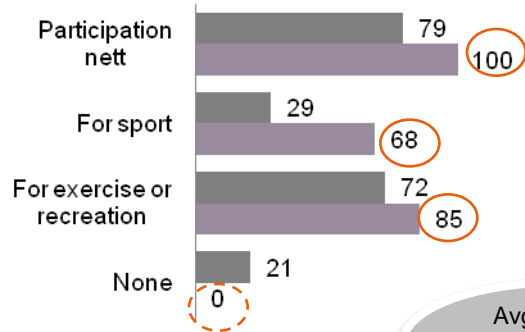
*"I've been playing (sport) since I was little, but I just don't like it that much anymore"*

*"It's something I've always done...I sometimes think there are other things I could be doing"*



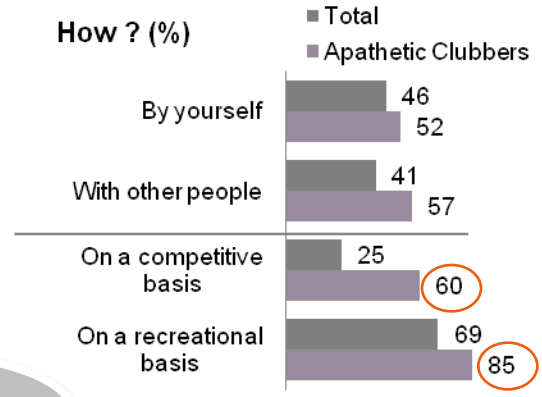
Despite their rather *on the fence* attitudes towards sports and physical recreation, they are highly active in both and participate in a range of activities including organised and individual activities.

### Physical activity (%)



Avg. 3.2 per week vs. 3.3 total

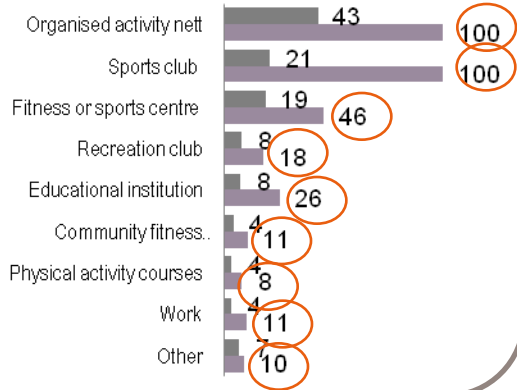
### How ? (%)



### What they do in clubs (%)

Basketball	11
Athletics	10
Australian Rules Football	10
Cricket (outdoor)	9
Dance	8
Martial arts	7
Golf	7
Running	7
Baseball/softball	5
Soccer/Football (outdoor)	5
Cycling	5
Walking	4
Netball	4
Fishing	4

### Organised ? (%)



### Main interests/ hobbies (%)

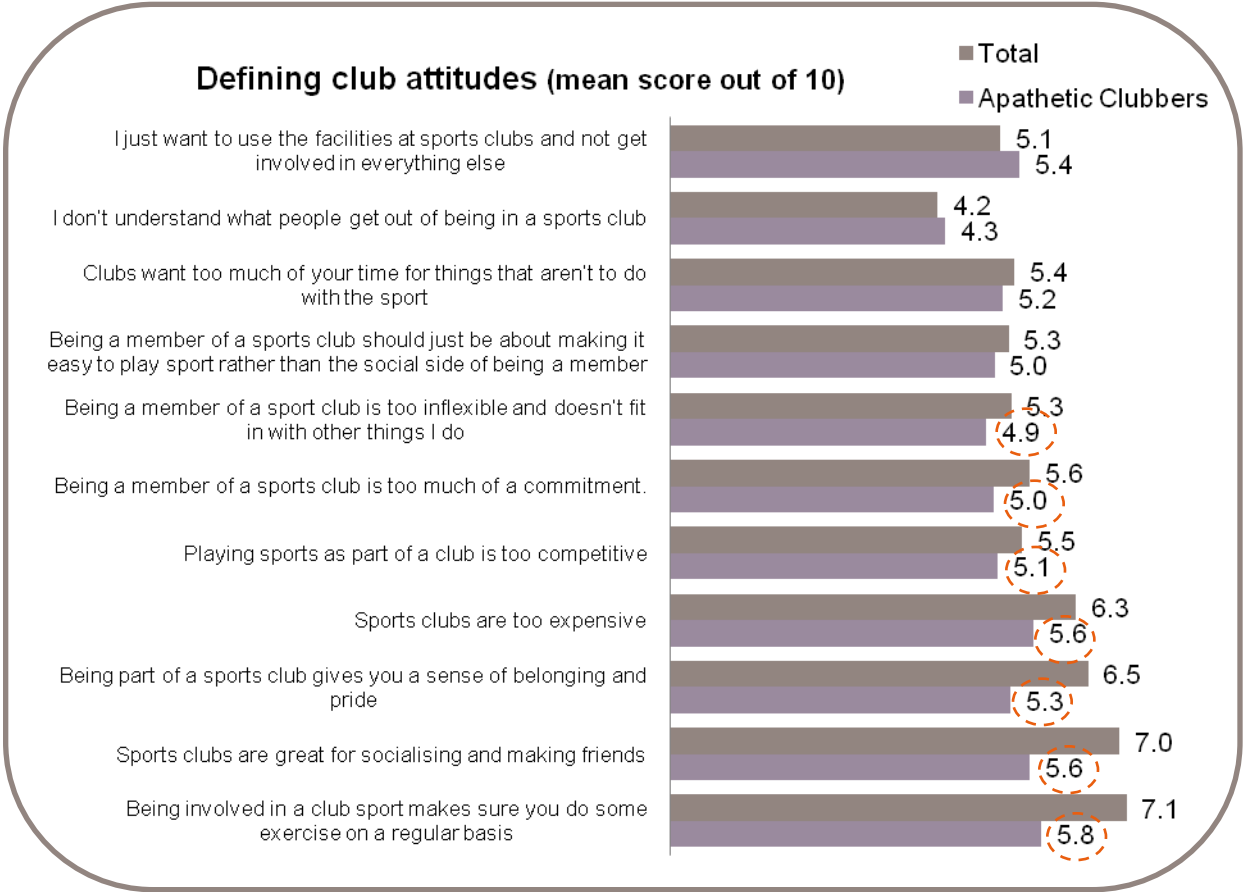
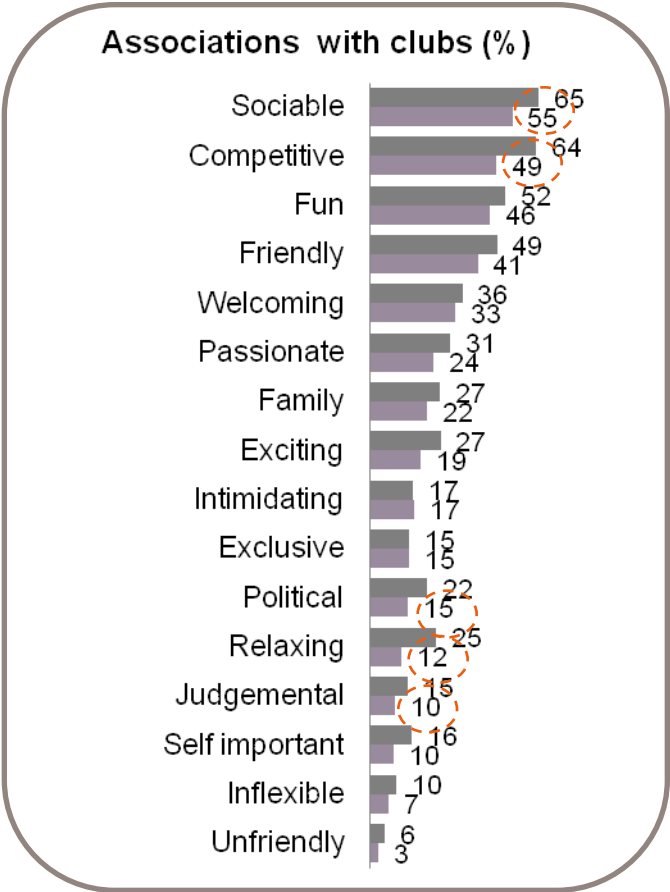


\*Showing top 5 non sport



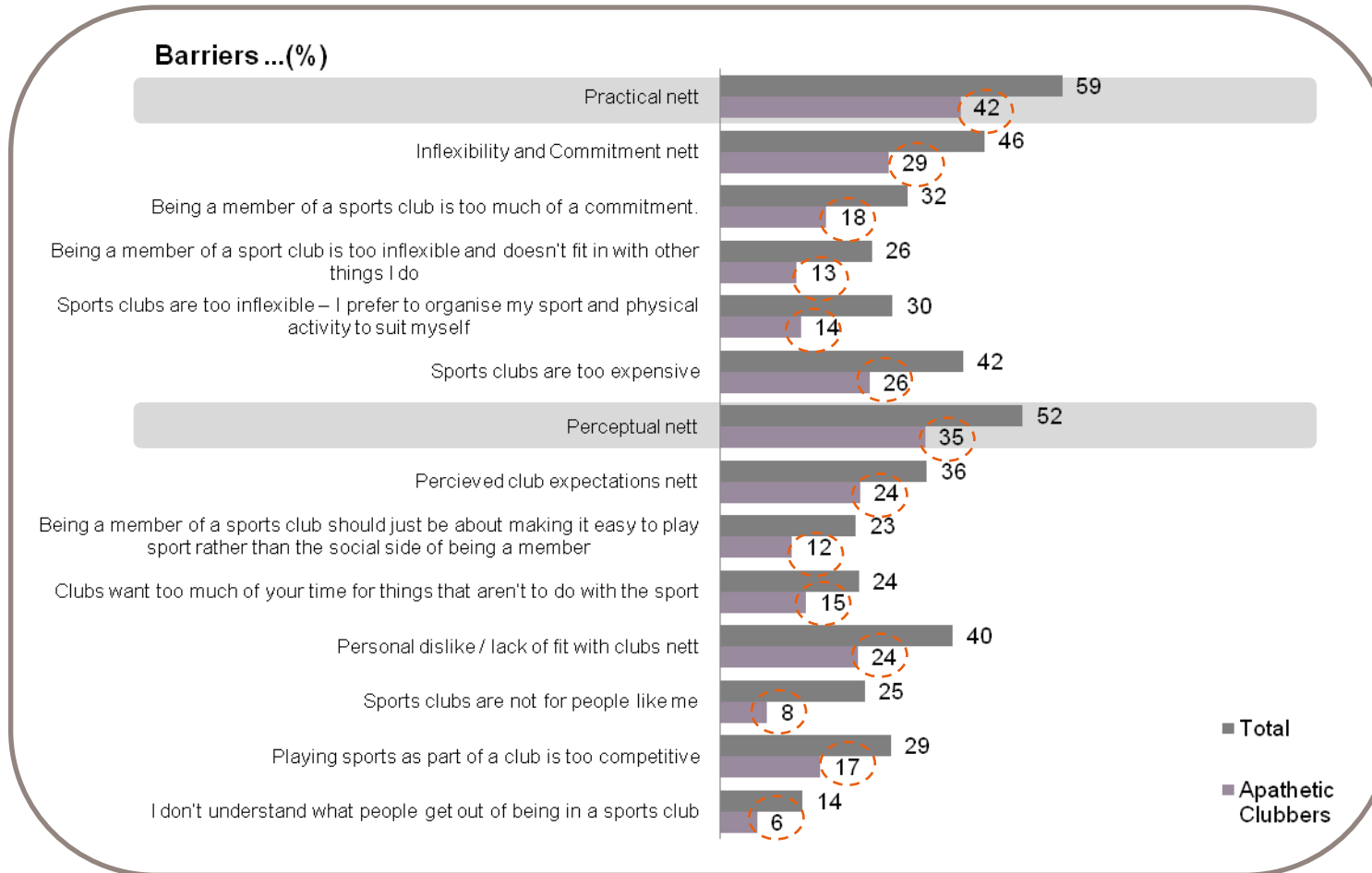
Although all are club members, this segment tends to have limited perceptions of clubs. Relative to other club member segments they are more likely to value clubs for their 'facilities' and how they can encourage you to do exercise. Although they do appreciate the other benefits, it's to a much lesser degree than other club members. Some feel pressure that you need to be good at sport to be part of a club.

100% club members





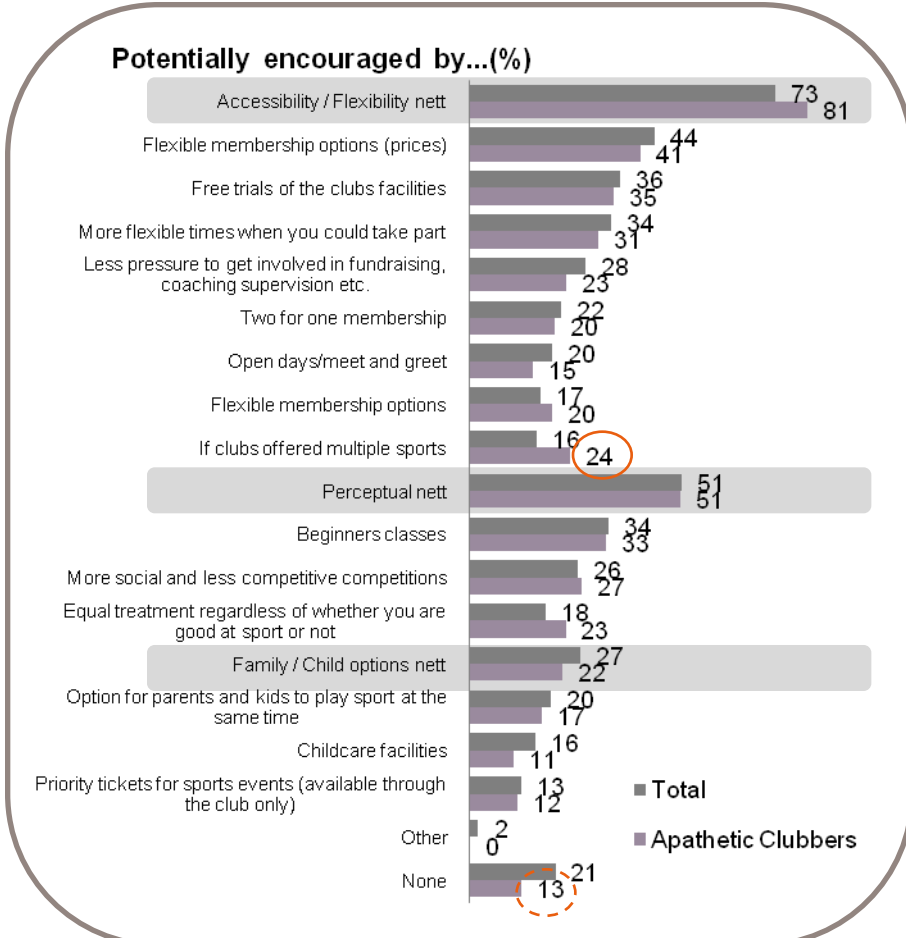
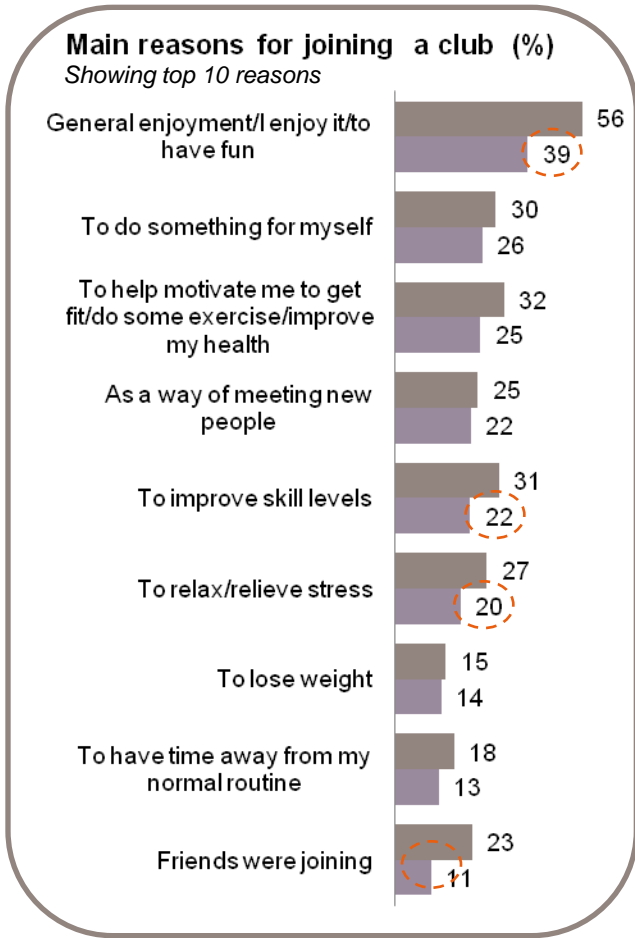
They hold both practical and perceptual barriers to membership in particular that clubs are expensive and too much of a commitment but also that they are too competitive.



# Apathetic Clubbers

# How can we help them stay in sports clubs?

This segment need to be reminded of the positive aspects of club membership including how they used to enjoy the sport and how it is a way to keep fit and healthy while having some fun. A key element is to ensure everyone feels they can join / feel comfortable in the club regardless of skill level. There may be a need to promote the social and fun aspects of clubs to reinvigorate this segment who are at risk of dropping out and finding other ways to fulfil their needs.



Respondents were asked if they wanted to do more sport. If so they were asked if they knew where to find out more. Only 13% (n=16) of Apathetic Clubbers were interested in doing more sport but did not know how to go about it. This indicates that the Apathetic Clubbers are confident they can find where to go when wanting to find clubs and information to fulfil their sporting needs.

# Marketing to the Apathetic Clubbers

## What to talk to them about? (Products)

*Non-competitive leagues*

*Personal training / goal setting programs*

*Competition to suit their skill / level*

## What to say? (Message areas)

*We'll help you learn and improve your skills*

*It doesn't matter what your skill level is, there is an opportunity for you to play and have fun*

*Get involved in something that helps you keep fit at the same time as having fun*

## How to say it? (Tone)

*Welcoming and inclusive*

## Where

Where to look	Total %	Apathetic Clubber %
Internet	46	47
Local newspapers	21	21
Ask friends or family	20	18
Preferred means of contact	Total %	Apathetic Clubber %
Email	31	30
Online/websites	37	41
Newspapers	39	33
Flyers in post-box	35	28
Community notice boards	25	26
Sign on days at sports grounds	14	15
School/University notices/school newsletters	13	16
Radio/TV advertising	15	10
Mobile (SMS/MMS)	5	7
Local fairs and fates	11	11



SEGMENTS OF NON MEMBERS WITH  
HIGH POTENTIAL FOR ACQUISITION

# Sidelined Sportsters







## Pen Portrait

Sidelined Sportsters are into sport and value the opportunity it provides to have some personal time, relax and break their routine. They particularly enjoy being part of sports teams, with the camaraderie and friendships it engenders. The competitive aspect of sport is also a key component in their enjoyment.

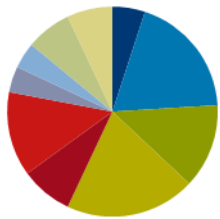
They would be quite comfortable at sports clubs and with their ability to hold their own in a sporting context. They were often members of clubs as children (even up to adulthood) and it will not have always been their choice to stop but rather their changing circumstances.

They retain a very positive perspective on clubs and the social and physical benefits of being involved. What they need is greater flexibility from clubs, but they don't necessarily see this as a club's responsibility. They see it as being their barrier, that they simply have other priorities and they cannot commit as much time or money as they might have in the past.

This is a key target group for acquisition as they have all the hallmarks of keen but lapsed sports club members. Indeed they may have been Loyalists or Socially Engaged when they were younger or before they stopped being a member. Additionally, given their interest in sport overall, there may be opportunities to attract this segment with products outside of the traditional club offer that address concerns with time and cost commitments.

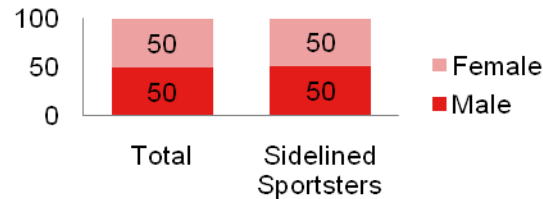
Representing over 1 in 10 Australians, this segment tends to be older and with family commitments. Among this group there appear to be potential barriers to sports participation and club membership with higher than typical levels of irregular working hours and relatively high levels of injury.

**2,035, 878 Australians aged 14-65 years old**

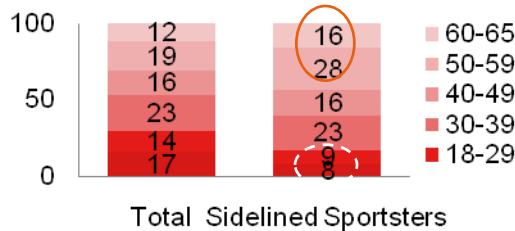


13% of Australians aged 14-65 years old

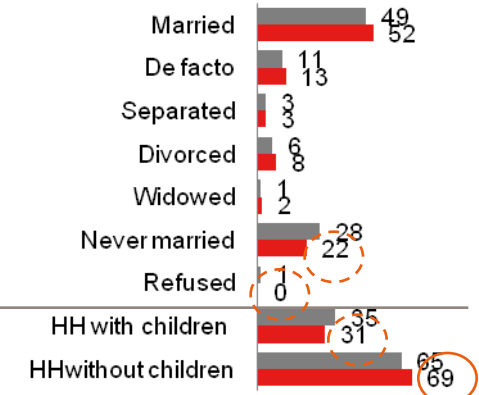
**Gender (%)**



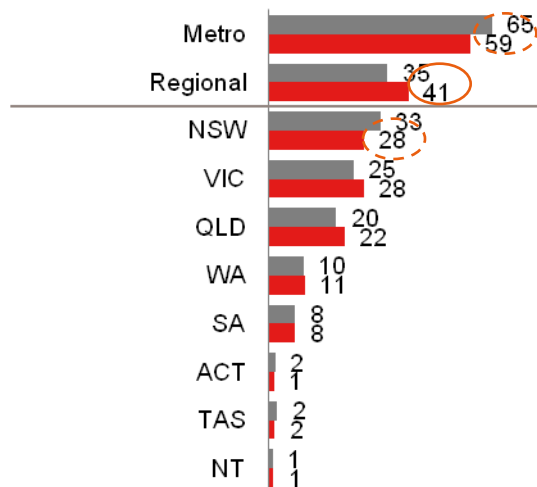
**Age (%)**



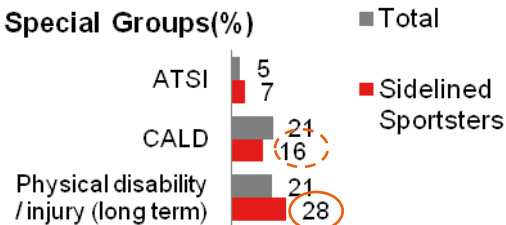
**Life-stage (%)**



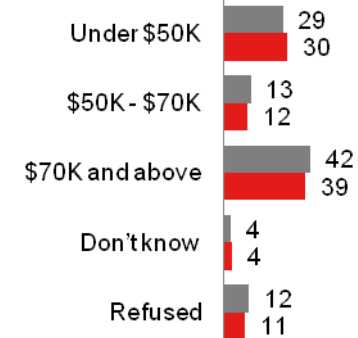
**Resides (%)**



**Special Groups (%)**



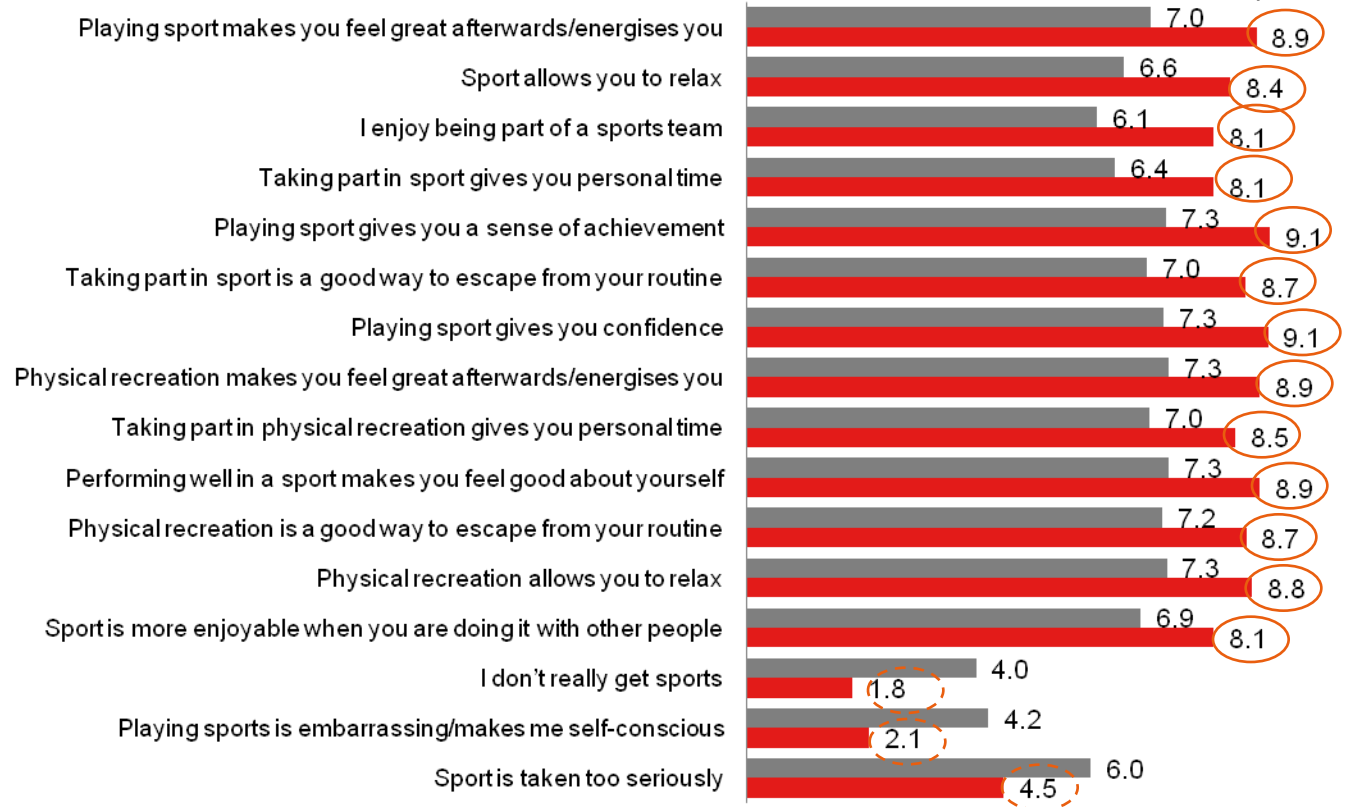
**Income (%)**





Sports and physical recreation provides relaxation and personal time out from their routine. Sport is particularly enjoyable in a team context and competition is part of the enjoyment

**Defining attitudes to physical recreation and sport (mean score out of 10)** ■ Total ■ Sidelined Sportsters



*"I like being active with my friends, and I'm not too bothered about how good I am."*

*"My sport / activity, needs to fit in with other things. I've got other priorities."*

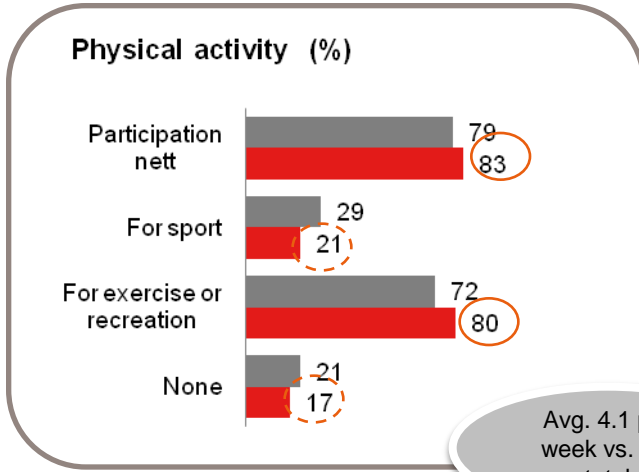
*"I have lots of interests and I don't want to be overly committed to things like a sports club."*

*"I need to do sport and be active in a way that is flexible."*

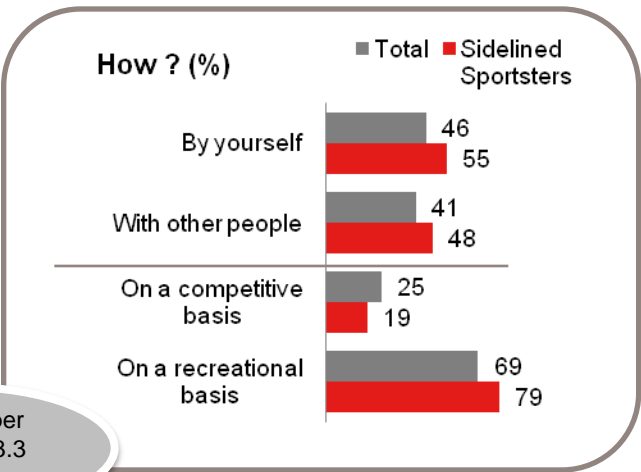
# Sidelined Sportsters

## What physical activity are they currently doing?

This is a physically active group - doing physical activity over 2 times a week . This is principally recreational and in sports that can be done independently. Importantly, they also participate in organised sport although not with sports clubs.

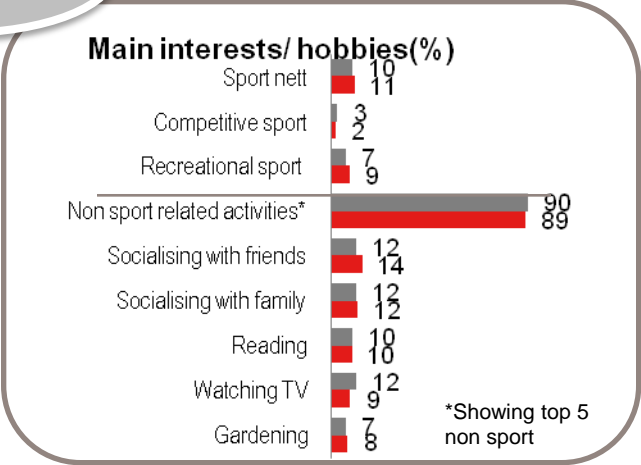
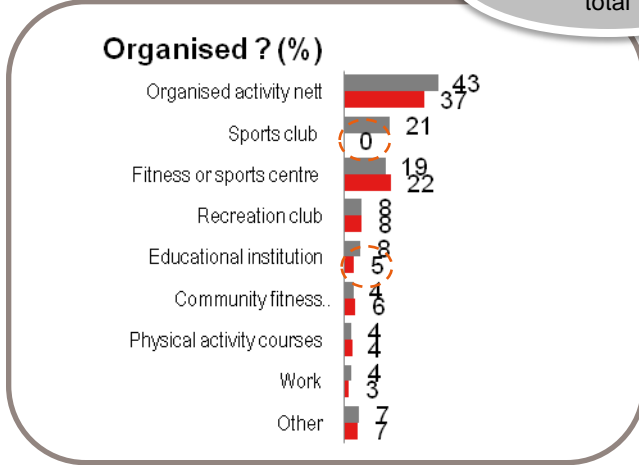


Avg. 4.1 per week vs. 3.3 total



### What they currently do (%)

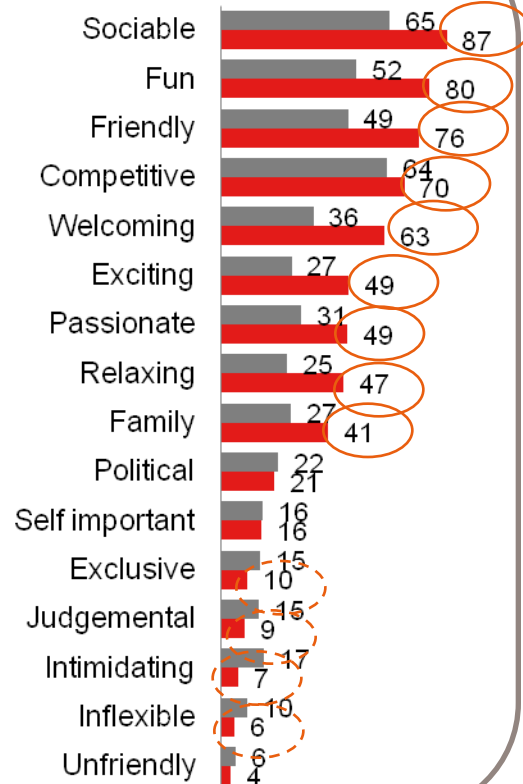
Walking	58
Swimming	26
Bushwalking	25
Cycling	21
Gym – as an individual	20
Fishing	16
Running	16
Dance	13
Weight training	13



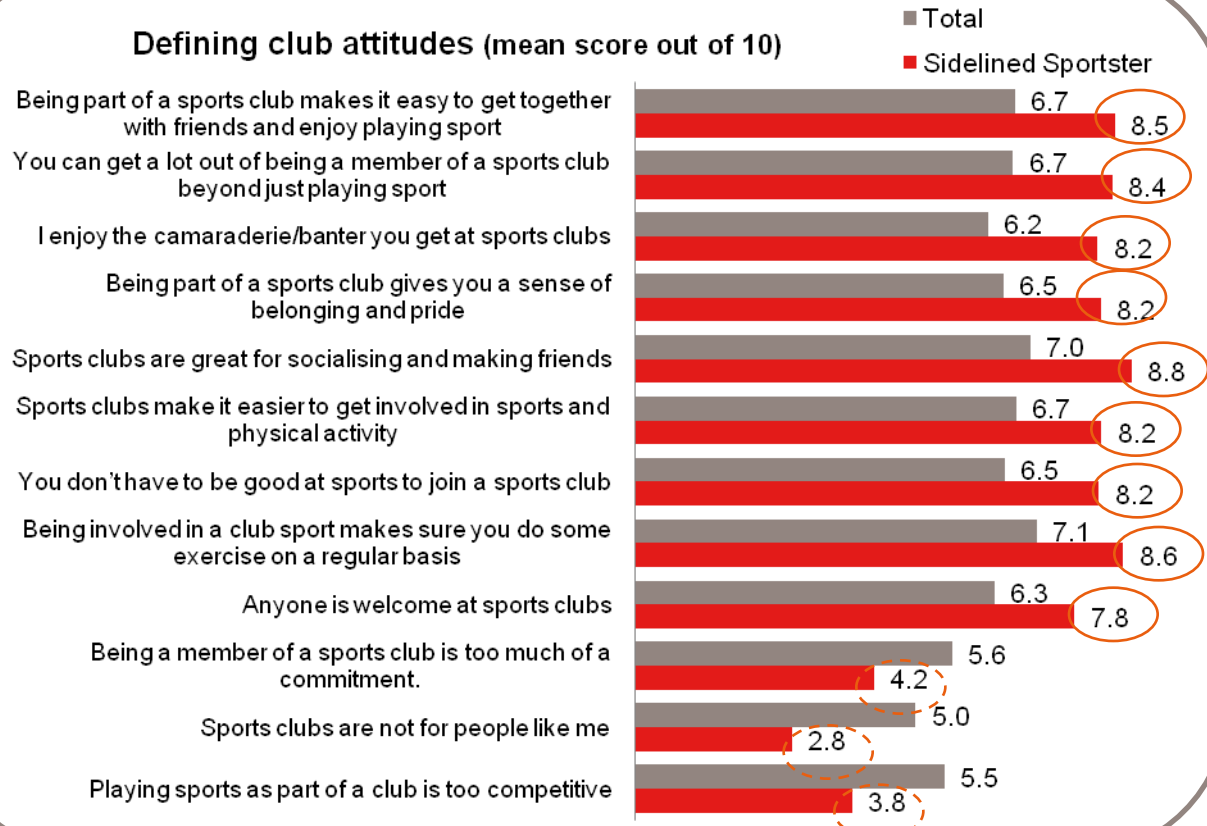


The Sidelined Sportster is very positive about clubs. They would enjoy the social aspects as well as the sense of achievement and belonging from membership. For this group, there are few perceptual barriers to consideration.

### Associations with clubs (%)



### Defining club attitudes (mean score out of 10)



Many Sidelined Sportsters have been members of sports clubs before and often well into adulthood. They retain a very fond and positive perspective on clubs. If sports clubs can provide the right products to fit into their current schedules, then this segment would be enthusiastic to return.

Interest in doing more sports?



They are already very active... (13%)

Previous club membership?



6 in 10 (59%) have been club members in the past

Interest in club membership?



They often want to get back into sports clubs. 2 in 3 (66%) would be extremely or quite interested



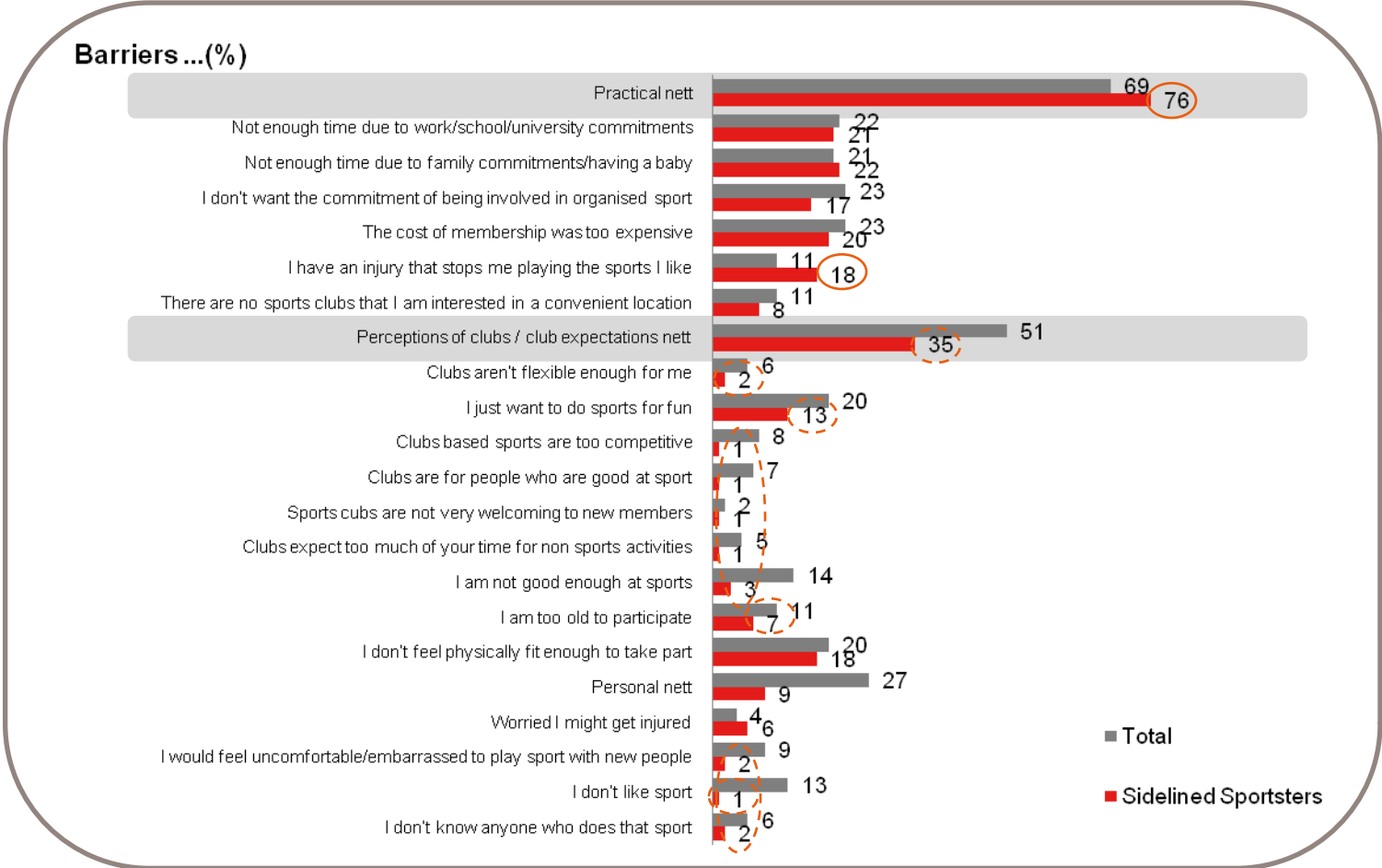
**Main Barriers to overcome**

*Practical*

It is all about flexibility – time commitments

Injuries

There are mainly practical barriers to club membership – namely other commitments as well as physical injuries that can impact consideration of membership.



# Sidelined Sportsters

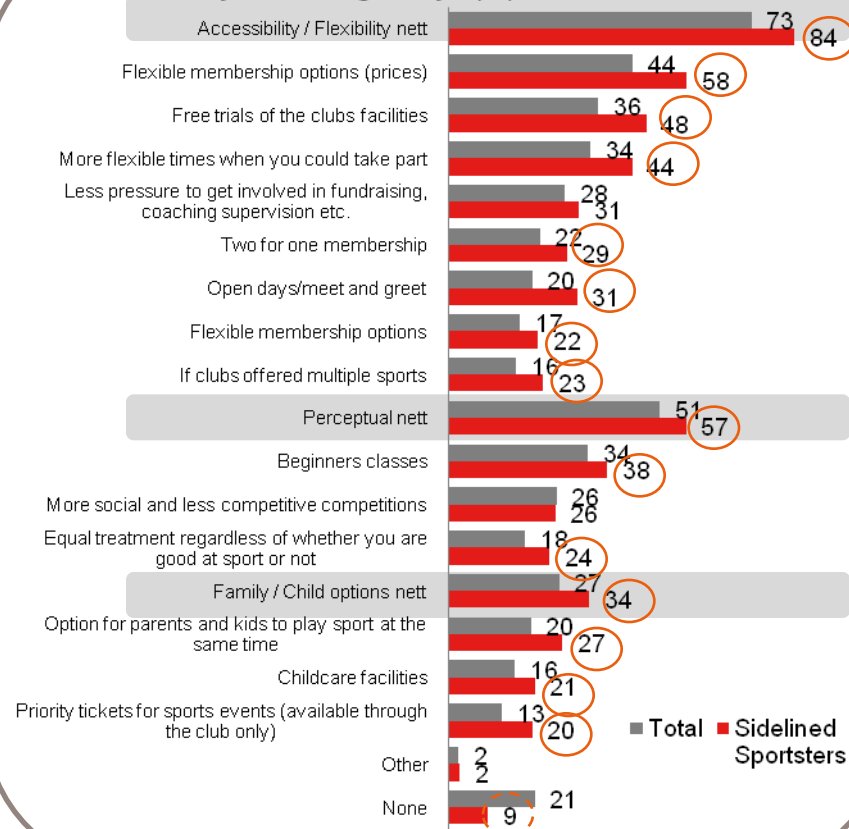
# Ideals for club sport participation?

Flexible options in terms of times that they can participate, along with membership cost / price options, will make it easier for them to step back into the fold. Given the numbers who have dropped out through injury, clubs should consider options for lower impact/less competitive versions or seek to encourage these people to take up suitable sports given their condition and tap into those they currently do.

**Main barriers to joining a club (%)**  
Showing top 10 barriers



**Potentially encouraged by...(%)**



Respondents were asked if they wanted to do more sport. If so they were asked if they knew where to find out more. Only 13% (n=58) of Sidelined Sportsters were interested in doing more sport but did not know how to go about it. This indicates that Sidelined Sportsters are confident they can find where to go when wanting to find clubs and information to fulfil their sporting needs.



# Marketing to Sidelined Sportsters

## What to talk to them about? (Products)

Options beyond the traditional club / competition structure may appeal which emphasise:

- Social aspects + competition
- Lower impact 'sport'
- Short competitions
- Alternative sports
- Out of hours leagues

Opportunities to try before you buy

## What to say? (Message areas)

You can still take part even if you are short on time

There's different options if you still want to play sport but the body isn't up to the same level it once was

Have fun with friends doing (new sport/ different type of competition)

Play and (eat, drink, BBQ)

Play at times to fit in around family and work

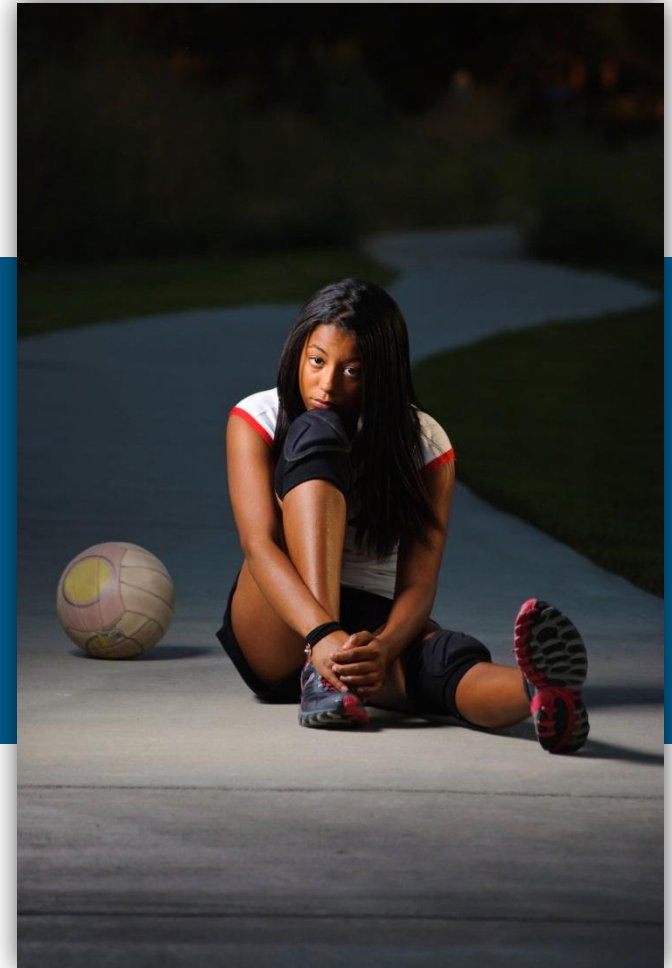
## How to say it? (Tone)

*Encouraging – you can still play sports*

## Where to say it?

Where to look	Total %	Sidelined Sportsters %
Internet	46	44
Local newspapers	21	23
Ask friends or family	20	20
Preferred means of contact	Total %	Sidelined Sportsters %
Newspapers	39	48
Online/websites	37	46
Flyers in post-box	35	46
Email	31	36
Community notice boards	25	35
Sign on days at sports grounds	14	22
Radio/TV advertising	15	21
School/University notices/school newsletters	13	15
Local fairs and fates	11	14
Demonstrations	6	7

# Club Wary





## Pen Portrait

The Club Wary are very positive about sports, though they want to enjoy their sport at a slightly less serious and competitive level. It is as much about challenging themselves and doing something active with friends.

Club Wary are not particularly critical of clubs but from past experiences as members, they have some reservations. While they appreciate the social and emotional benefits that clubs can offer, they see clubs as requiring significant commitment and lacking in flexibility. The Club Wary do not always feel they will fit in at clubs and can be slightly self-conscious about playing sport with others. These are not unlike Sport Driven (who are club members) in that they would prefer not to get heavily involved in the social and administrative aspects of the club, instead their preference is just for sports and facilities. There are CALD members in this segment than in others.

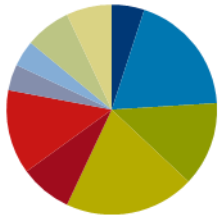
The Club Wary are a realistic target for acquisition, but clubs need to be proactive in seeking them out and communicating with them. They want to get more involved in sports clubs but often don't know where to find information. Direct mail (inviting them to a demonstration) and local newspapers are ideal sources coupled with easily accessible online information.

To attract this segment, clubs and or sporting opportunities beyond the traditional club structure will need to avoid a sense of over commitment or competition (both in time and cost) and obligation when messaging and in the products offered.



The Club Wary make up under 1 in 10 of the Australian population. They are more likely to have commitments to family and children and full time work. Nearly 2 in 5 are from CALD households.

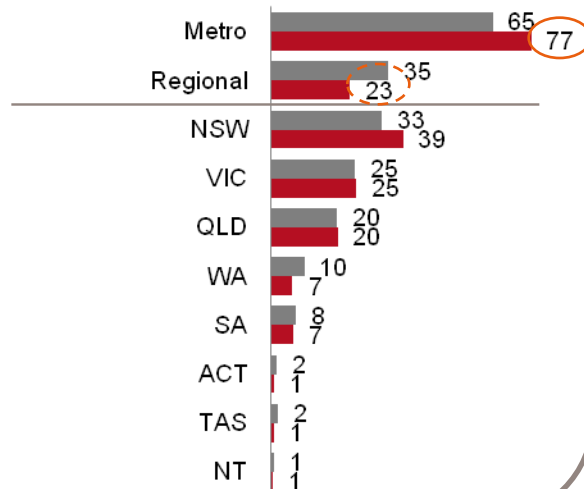
**1,145,957 Australians aged 14-65 years old**



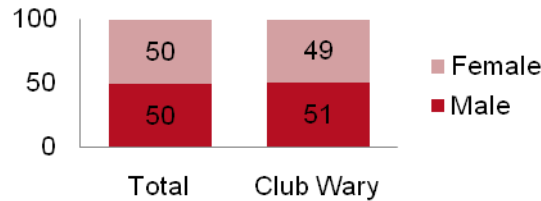
8% of Australians aged 14-65 years old



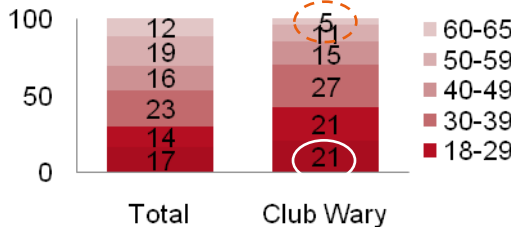
**Resides (%)**



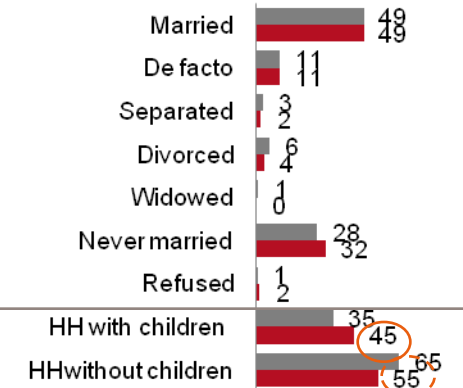
**Gender (%)**



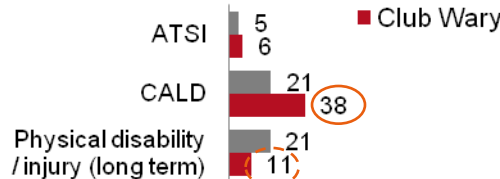
**Age (%)**



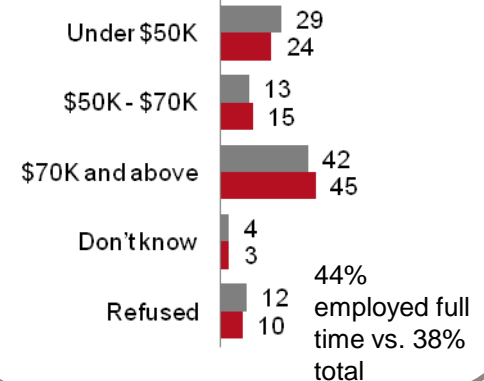
**Life-stage (%)**



**Special Groups (%)**



**Income (%)**

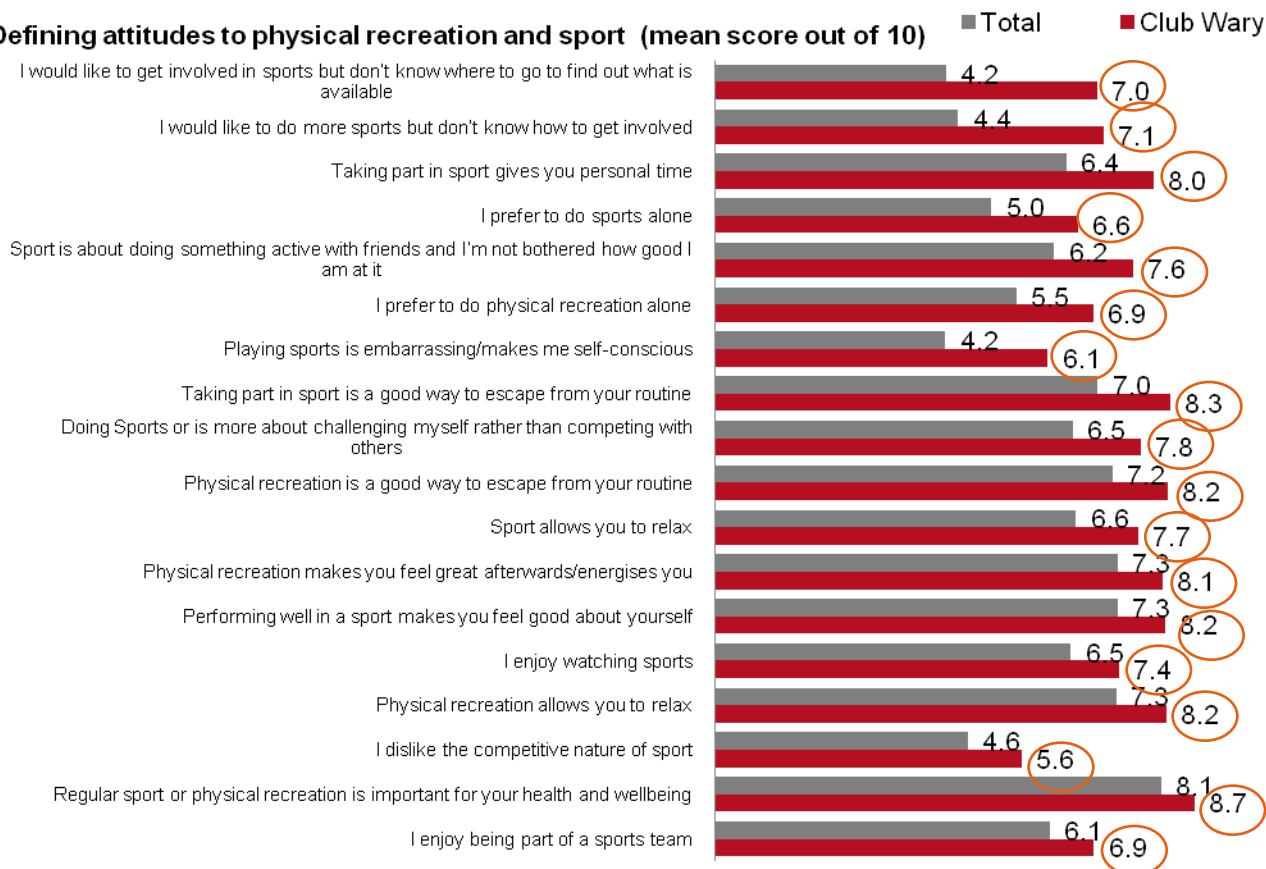


Adult Market Segmentation Study 2012: Total sample (n=3498) and Club Wary' segment (n=199)



The Club Wary enjoy sports and would like to do more if they knew where to look. They are not overly competitive and sport is more about participating with friends and having personal time. It's about challenging themselves and having fun. That said, the Club Wary have a degree of self-consciousness which needs to be considered when communicating with this segment.

### Defining attitudes to physical recreation and sport (mean score out of 10)



*"I wouldn't really fit into a sports club; they're not my type of people."*

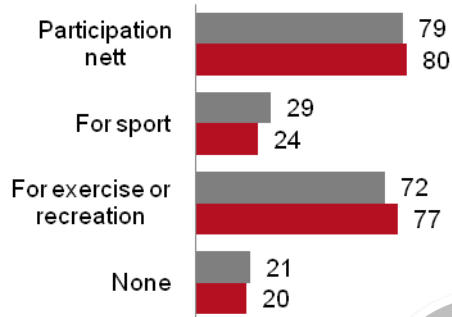
*"Sports clubs are full of cliquey people I wouldn't fit in with."*

*"I love my sport, but joining a club is too big an investment of money / time / energy."*

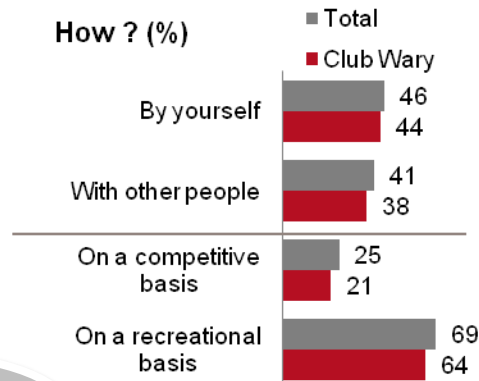
*"Sports clubs are too political and traditional for me."*

Although this segment is relatively active in recreational activities in a self or organised capacity, they are not members of a sports club. They tend to be members of fitness centres or recreational / social clubs.

### Physical activity (%)



### How ? (%)

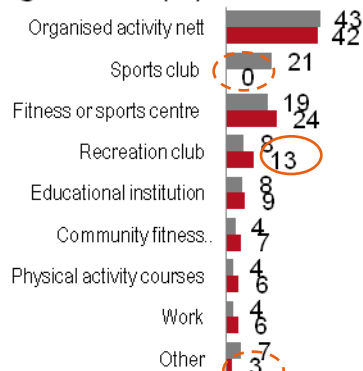


### What they currently do (%)

Walking	45
Gym – as an individual	23
Swimming	21
Bushwalking	19
Fishing	16
Running	16
Dance	16
Cycling	13
Yoga	10
Basketball	10
Tennis	10
Cricket (outdoor)	9
Weight training	9

Avg. 2.9 per week vs. 3.3 total

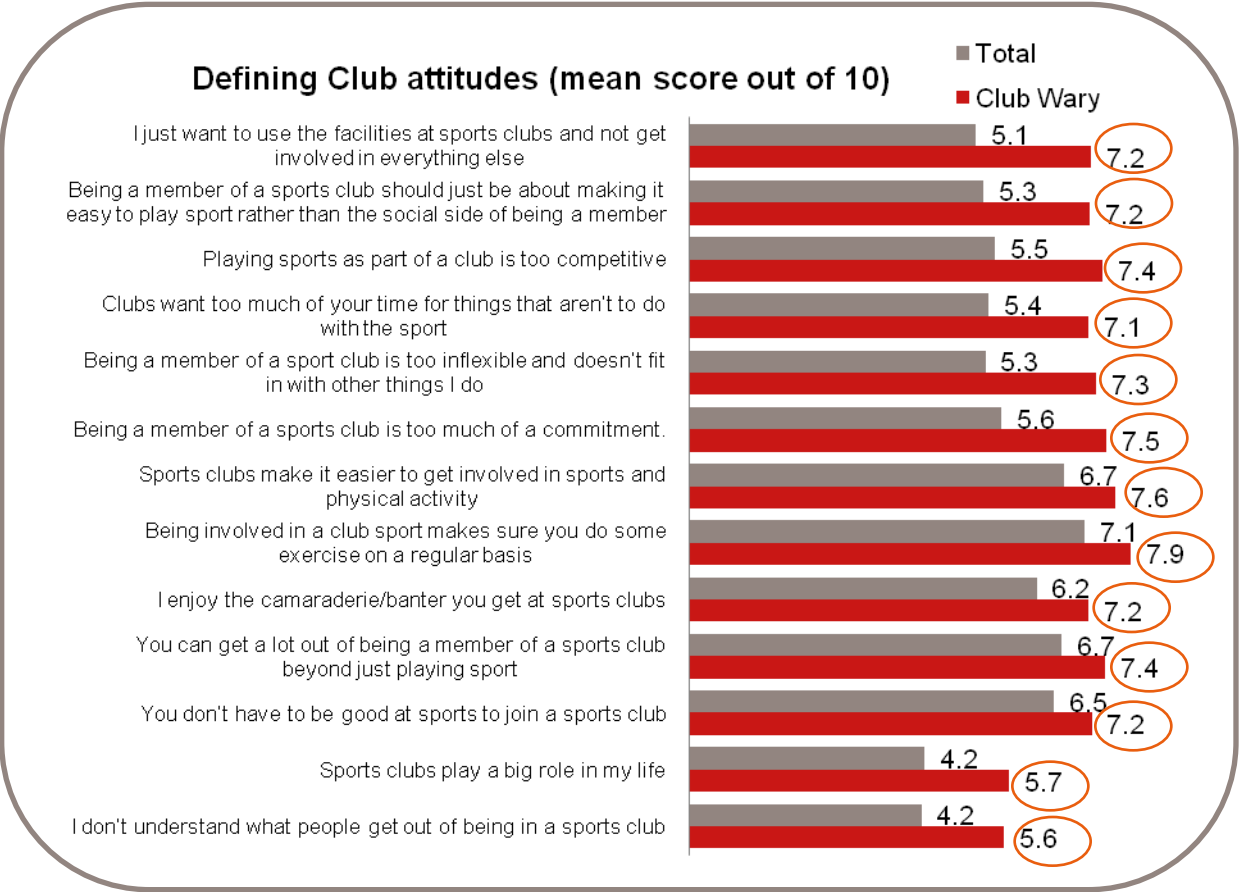
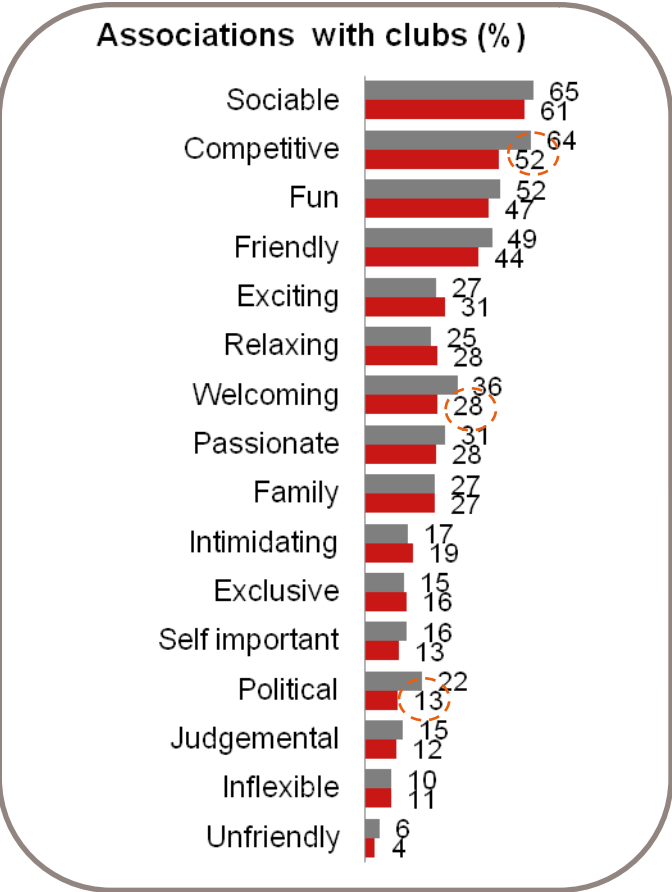
### Organised ? (%)



### Main interests/ hobbies(%)



The Club Wary whilst seeing clubs as a way to get involved and disciplined in sport and physical activity tend to value clubs for their facilities over other forms of involvement. They tend to think clubs are overly competitive and inflexible requiring too much commitment. There may also be barriers of 'competitiveness' to overcome when addressing this group.



This segment would like to join sports clubs and do more sports/physical activity but needs help to access information about what is available and where. They are not overtly negative about clubs. Often from experience however they do have some concern as to whether clubs are “for them” and that they might require too much financial and time commitment

Interest in doing more sports?



69% would like to do more, but don't know where

Previous club membership?

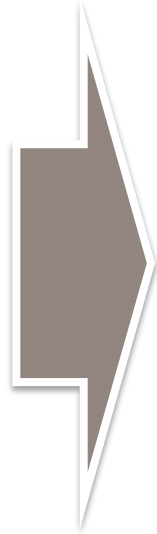


High – over half (56%) have been members in the past

Interest in club membership?



High interest in joining clubs - 56% extremely or quite interested but many feel it is 'too competitive'



**Main Barriers to overcome**

*Practical*

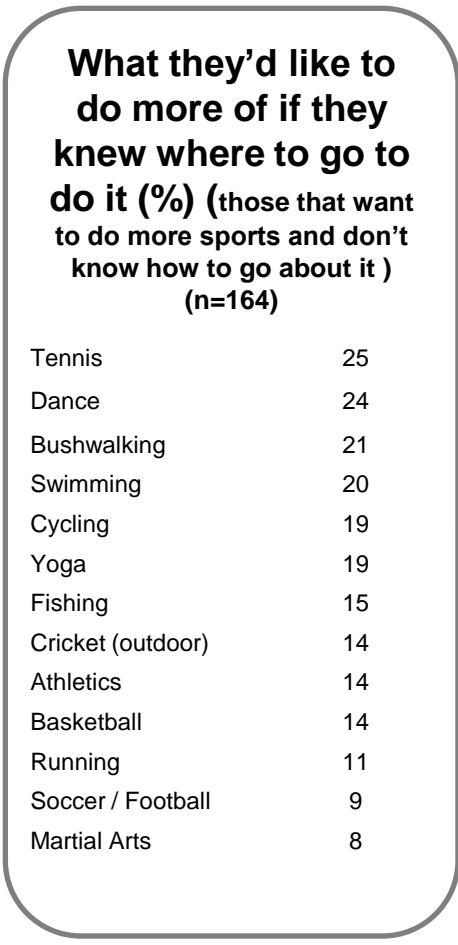
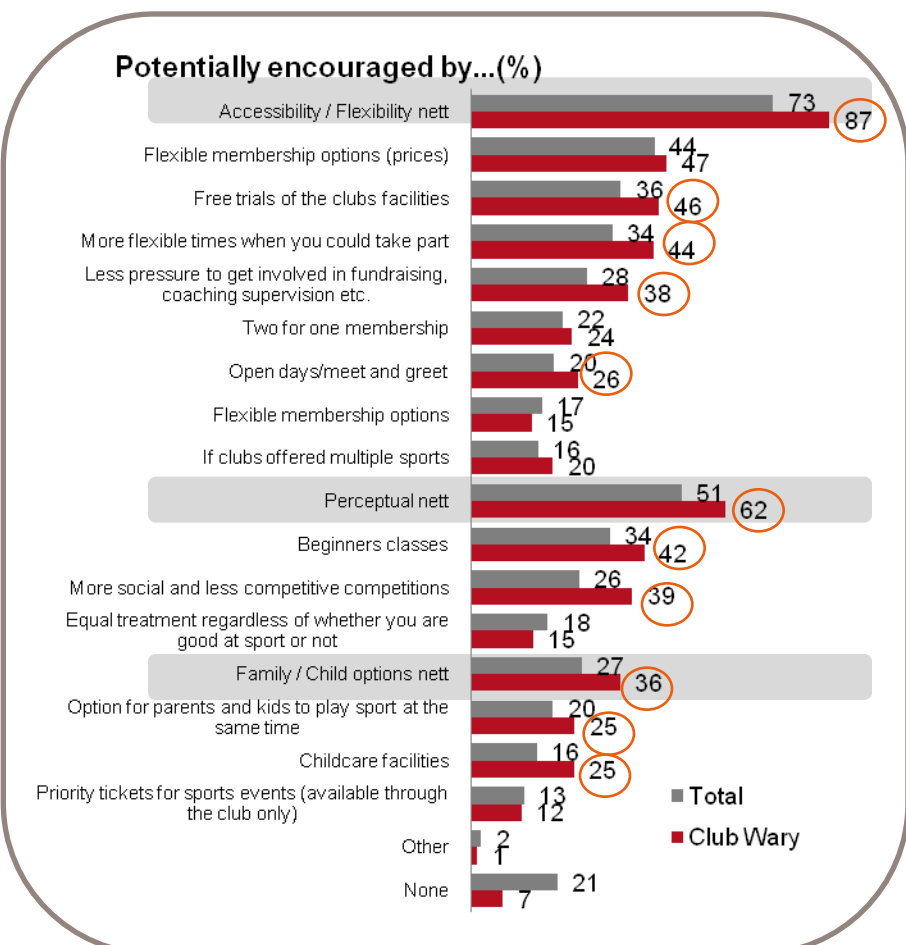
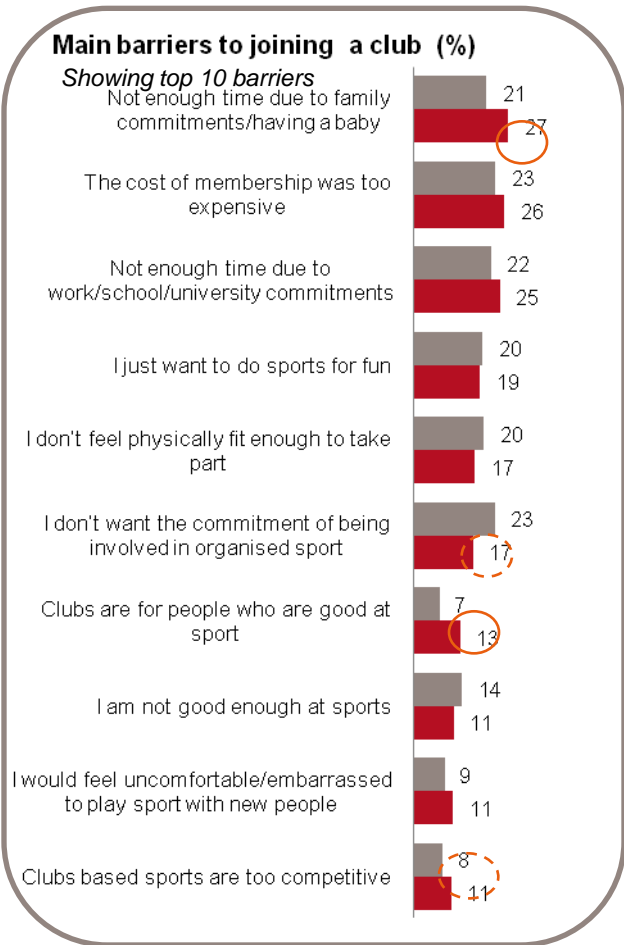
- Lack of time / fear of over-commitment
- Lack awareness of where to go/where to look for information

*Perceptual*

- Negative perceptions of clubs as overly competitive, or expectations of being 'good' at a sport and consequently 'not for them'



Beginners classes and free trials are popular ways to introduce the Club Wary to clubs. More flexibility in times and prices as well as a less competitive approach could also assist. There are a range of activities which could entice this segment.



# Marketing to the Club Wary

## What to talk to them about? (Products)

Beginners / skill building classes / teams

Flexible membership around costs (e.g. 2 for 1 memberships)

Proactive communications highlighting the facilities of the club

Offer of trial 'membership' without full financial commitment

This segment may also be attracted to opportunities to participate in sport beyond the traditional club / competition structure

## What to say? (Message areas)

Club is inclusive and for all levels, not elitist

Highlight the offer to play the sport they want at good facilities

Focus on the sport and play up facilities

Join with a friend

Focus on building skills while playing the sport

Competition as a means of improvement and for self achievement.

## How to say it? (Tone)

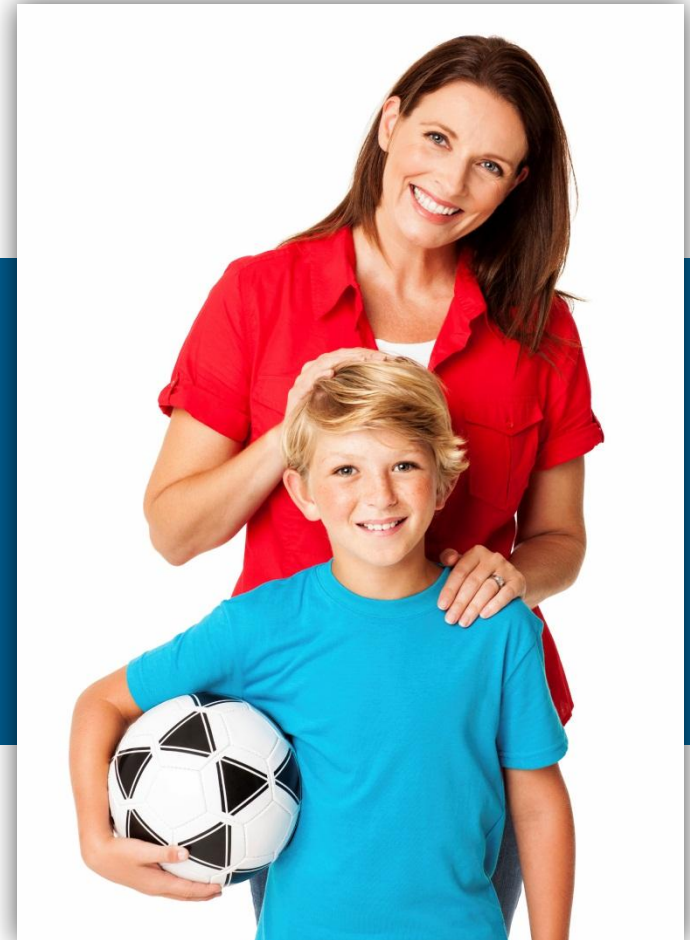
*Helpful*

## Where

Where to look	Total %	Club Wary %
Internet	46	53
Local newspapers	21	20
Ask friends or family	20	16

Preferred means of contact	Total %	Club Wary %
Newspapers	39	37
Flyers in post-box	35	35
Online/websites	37	34
Email	31	32
Community notice boards	25	21
School/University notices/school newsletters	13	13
Radio/TV advertising	15	12
Local fairs and fates	11	11
Demonstrations	6	9

# Ponderers





## Pen Portrait

Often married with children at home, they are active people but commitments to work and family take up much of their time. They fit in a reasonable amount of physical activity but this is mainly recreational and focused on activity that can be done alone and often on an ad hoc /irregular basis. Essentially, they try and do activity around other commitments.

They do not need to be convinced about the benefits of sport and physical exercise and they derive strong personal satisfaction and achievement from participation. Typically they were members of clubs into adulthood, until for practical reasons they felt they had to give up. They have a fairly positive view of clubs both socially and as a way to support health and fitness but they will be weighing this up against the time and cost involved in being a member.

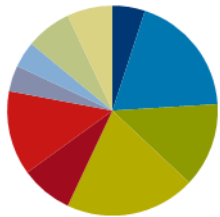
Though less competitive than many other segments, most show at least some interest in joining clubs. Clubs can be seen as a way to escape their normal routine, and membership would be embraced with flexible participation and cost options. Encouraging membership is about convincing them they can join without the fear of neglecting their other commitments. Additionally, there may be opportunities to attract this segment with products outside of the traditional club offer that address concerns with time and cost commitments but provide an avenue to encourage fitness and sport participation.

# Ponderers

# What do they look like?

Ponderers are one of the largest segments making up nearly one in five Australians. They are often married with children living at home and working either full time or part time suggesting a busy family life.

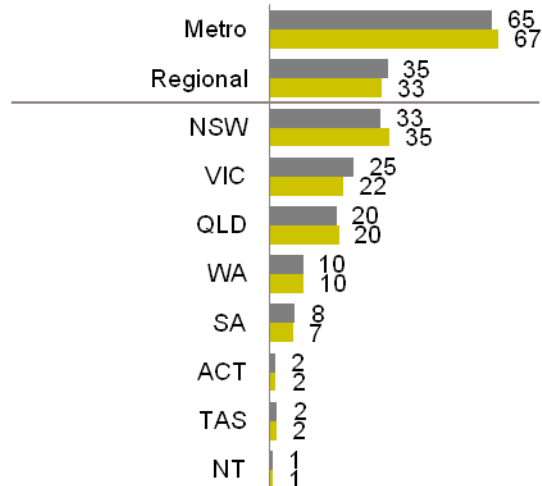
**2,969,162 Australians aged 14-65 years old**



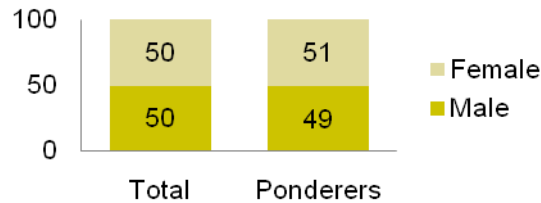
20% of Australians aged 14-65 years old



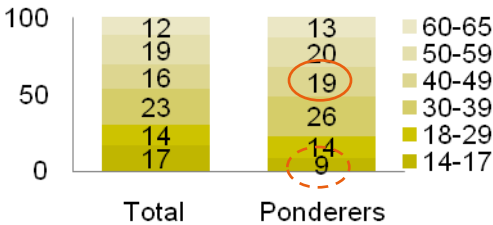
**Resides (%)**



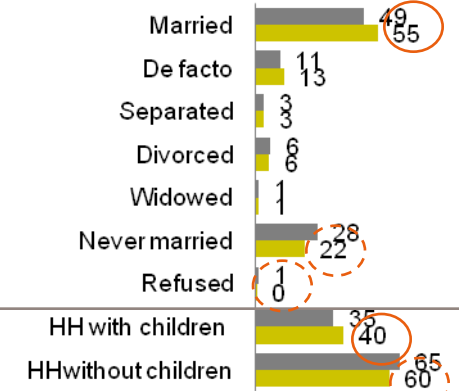
**Gender (%)**



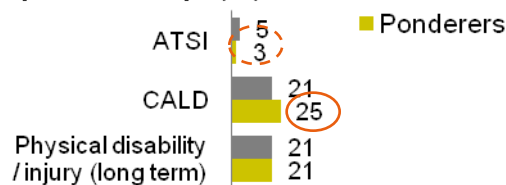
**Age (%)**



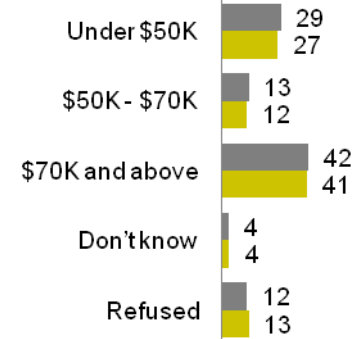
**Life-stage (%)**



**Special Groups (%)**



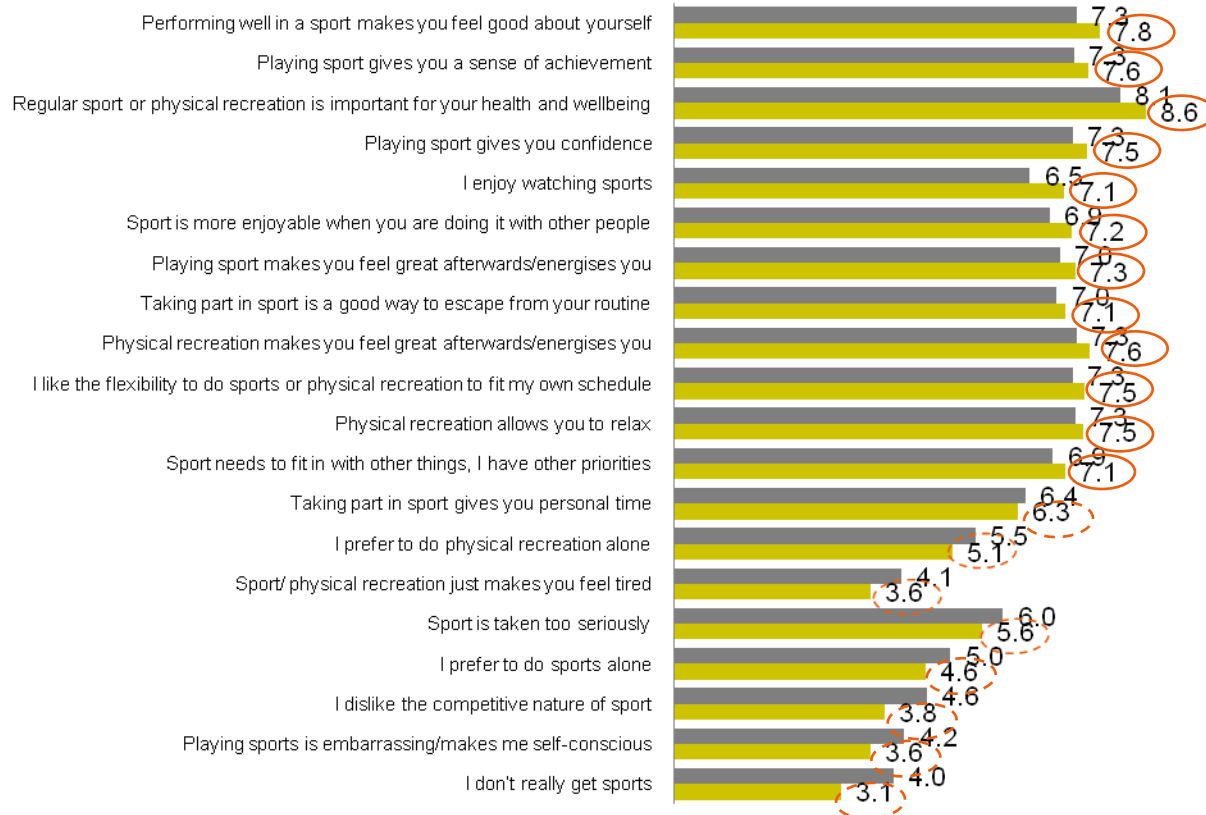
**Income (%)**





Ponderers enjoy both participating in and watching sport. They identify that sport can provide a strong sense of personal satisfaction and sense of achievement. They show some interest in doing more sports / physical activity and they don't need convincing of the benefits.

**Defining attitudes to physical recreation and sport (mean score out of 10)** ■ Total ■ Ponderers



*"I'd like to do something for me."*

*"I'm interested in sport and being active, but haven't found a way to fit it in my lifestyle yet."*

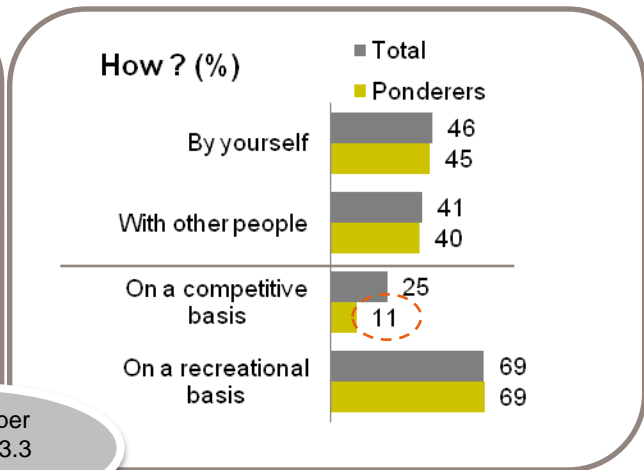
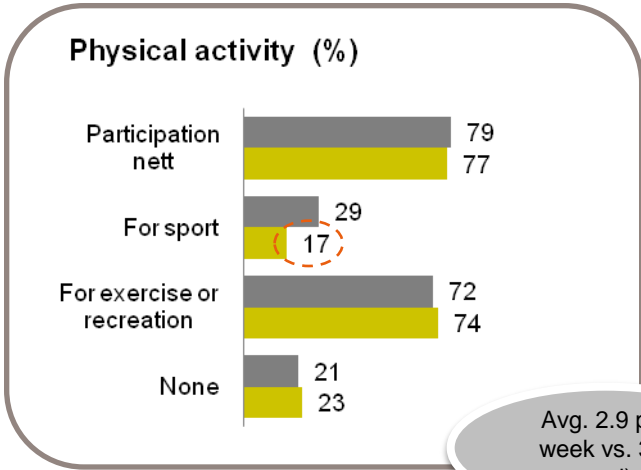
*"I don't reject doing organised sport, but I don't know how to find something that suits."*

*"Sport could offer me a routine / structure to get healthy and exercise."*

# Ponderers

## What physical activity are they currently doing?

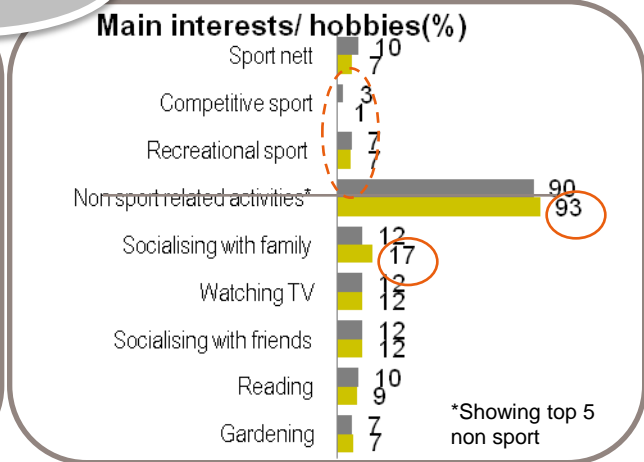
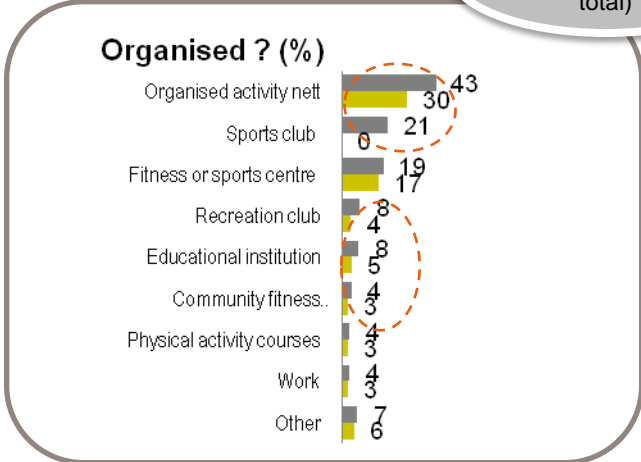
Ponderers do a reasonable amount of physical activity, both with others and alone. Their activity is predominantly recreational. Just over 1 in 4 participate in organised activities.



### What they do (%)

Walking	54
Gym – as an individual	21
Swimming	19
Bushwalking	18
Dance	16
Fishing	15
Running	11
Cycling	11
Tennis	10

Avg. 2.9 per week vs. 3.3 total

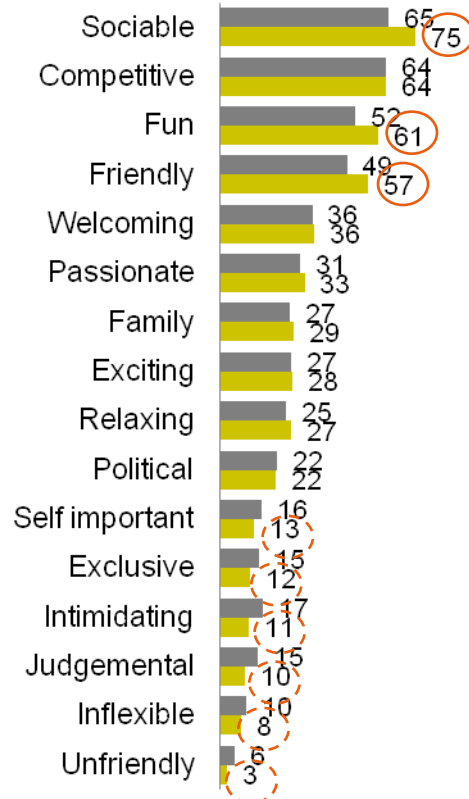


# Ponderers

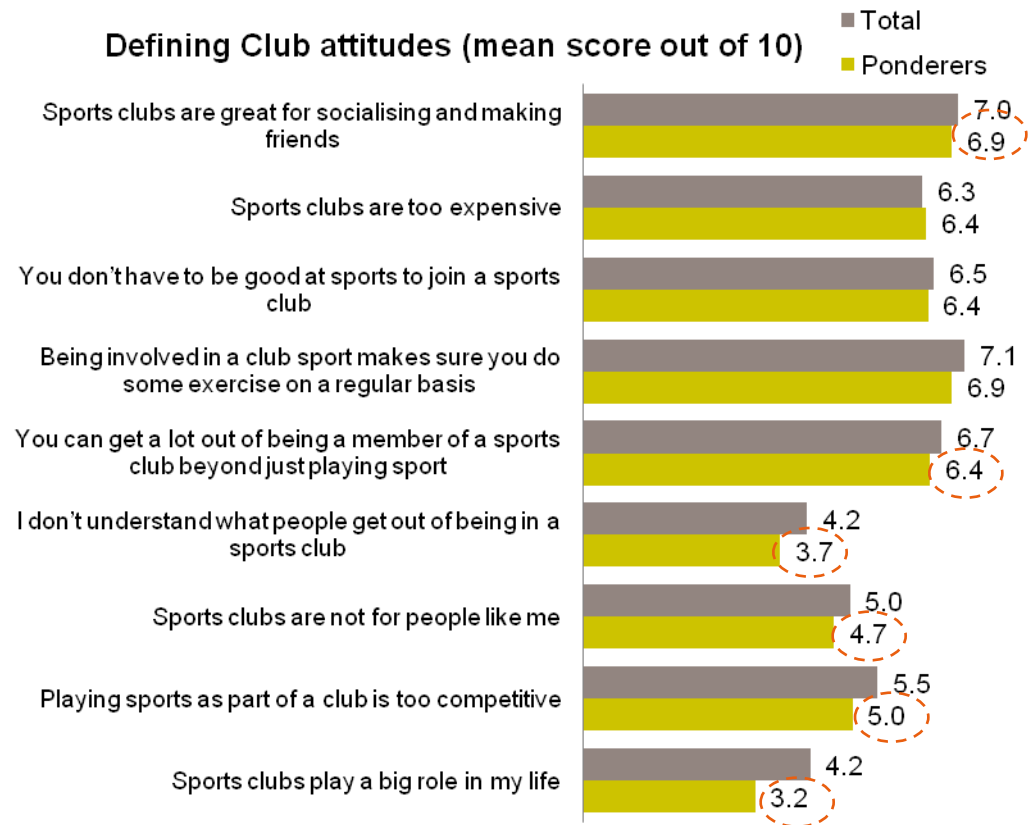
## What they say about clubs?

Encouragingly, Ponderers like the social side of clubs and feel that clubs can motivate you to exercise regularly and one can be a member without having to be 'good at sports'. Costs to participate in club-based sport however could be a barrier for this segment.

Associations with clubs (%)



Defining Club attitudes (mean score out of 10)





# Ponderers

# Their relationship to clubs?

A majority of Ponderers have been members of clubs and only gave up in adulthood due to other commitments. Importantly, they still have a positive opinion of the benefits club sport offers. They do like sport even though they currently only take part in recreational activity and most are willing to consider club membership.

Interest in doing more sports?



20% would like to do more sports and don't know how to go about it

Previous club membership?

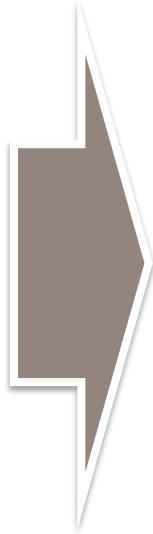


61% have been members in the past

Interest in club membership?



4 in 10 (39%) have at interest in joining a sports club if it could meet their needs



**Main Barriers to overcome**

***Practical***  
Fitting club sport around other commitments such as family or work

# Ponderers

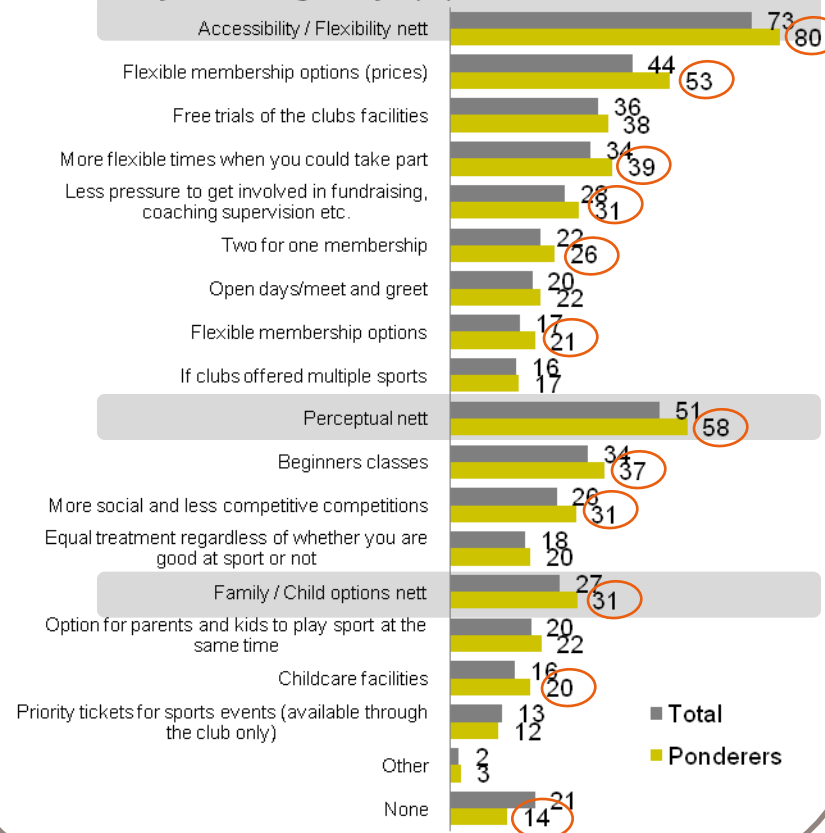
# Ideals for club sport participation?

Developing flexible membership options at a reasonable price, programs to support family participation, free trials and beginners classes could all contribute to encouraging Ponderers to re-consider membership of sports clubs.

### Main barriers to joining a club (%) Showing top 10 barriers



### Potentially encouraged by...(%)



### What they'd like to do more of if they knew where to go to do it (%) (those that want to do more sports and don't know how to go about it) (n=141)

Tennis	30
Bushwalking	31
Swimming	28
Dance	27
Cycling	21
Yoga	18
Canoeing/kayaking	16
Martial arts	15
Golf	16
Lawn Bowls	17
Fishing	16
Running	14
Weight training	13
Soccer/Football (outdoor)	12
Cricket (outdoor)	12
Snow sports/ice skating	11
Soccer/Football (indoor)	10
Basketball	10
Netball	10

# Marketing to the Ponderers

## What to talk to them about? (Products)

Flexible membership (time and cost)

Family membership

Range of activities / sports

Different levels / age classes

Timetable / suggestions on how to fit it into your schedule (case studies and testimonial?)

This segment may also be attracted to opportunities to participate in sport or physical activity beyond the traditional club / competition structure

## What to say? (Message areas)

Remind them of the fun and personal satisfaction of playing with others

Help them escape the routine

Feel positive and do something for yourself

Do it in your own time  
Play while your children do

## How to say it? (Tone) *Helpful*

## Where to say it?

Where to look	Total %	Ponderers %
Internet	46	47
Local newspapers	21	23
Ask friends or family	20	20

Preferred means of contact	Total %	Ponderers %
Newspapers	39	43
Flyers in post-box	35	39
Online/websites	37	39
Email	31	32
Community notice boards	25	27
Radio/TV advertising	15	17
Sign on days at sports grounds	14	16
Local fairs and fates	11	14
School/University notices/school newsletters	13	12



SEGMENTS OF NON MEMBERS WITH  
LOW POTENTIAL FOR ACQUISITION

# Self Focused





## Pen Portrait

Typically female, Self Focused are turned off by the competitive nature of sport but enjoy the physical and mental benefits that regular physical activity and exercise provides them.

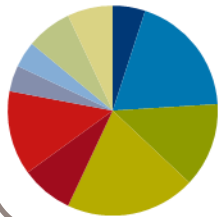
They are physically active which is often to counterbalance a sometimes sedentary work-life. They prefer to exercise alone and physical activity is often a personal rather than a social pursuit – which reflects their dislike of organised and team sports and their focus on self improvement. They are a challenging target for clubs. Their experience of clubs when younger has often left them with negative perceptions which are at odds with their desire for a non competitive and more flexible environment which allows them to control their own schedule around other commitments and interests.

There is potential for sports to develop products which cater to this segment's individual needs such as self improvement and fitness . This would require sports to offer products as well as activities outside of the traditional club structure of membership, training and competition.



The Self Focused make up over 1 in 10 of Australians. They are typically female and less likely to be employed, particularly in a full time capacity. Those working are likely to be doing so in regular daytime hours in desk bound jobs.

**1,943,508 Australians aged 14-65 years old**

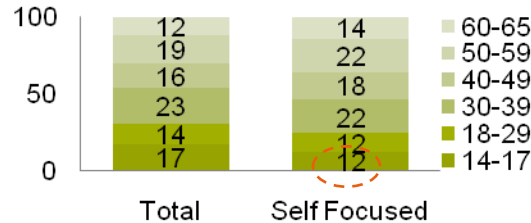


13% of Australians aged 14-65 years old

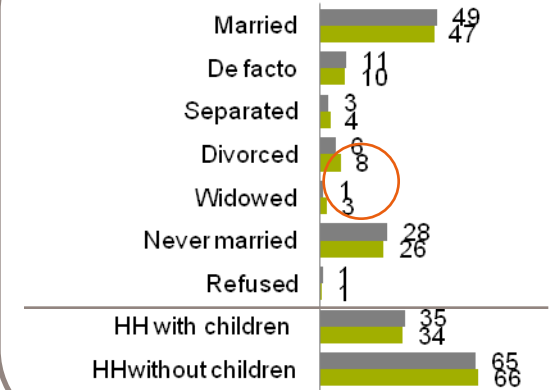
**Gender (%)**



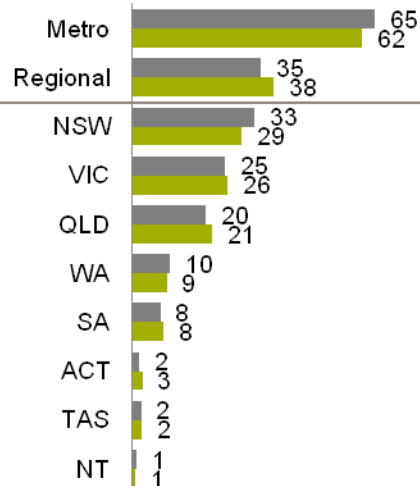
**Age (%)**



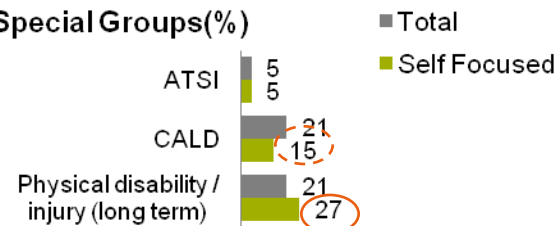
**Life-stage (%)**



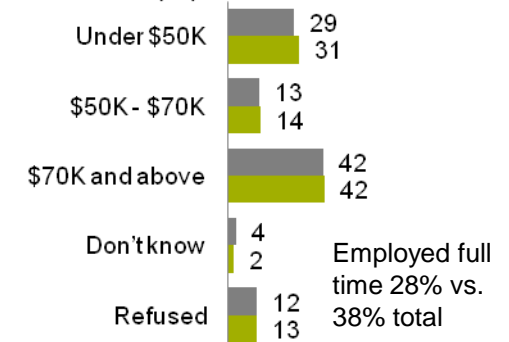
**Resides (%)**



**Special Groups (%)**



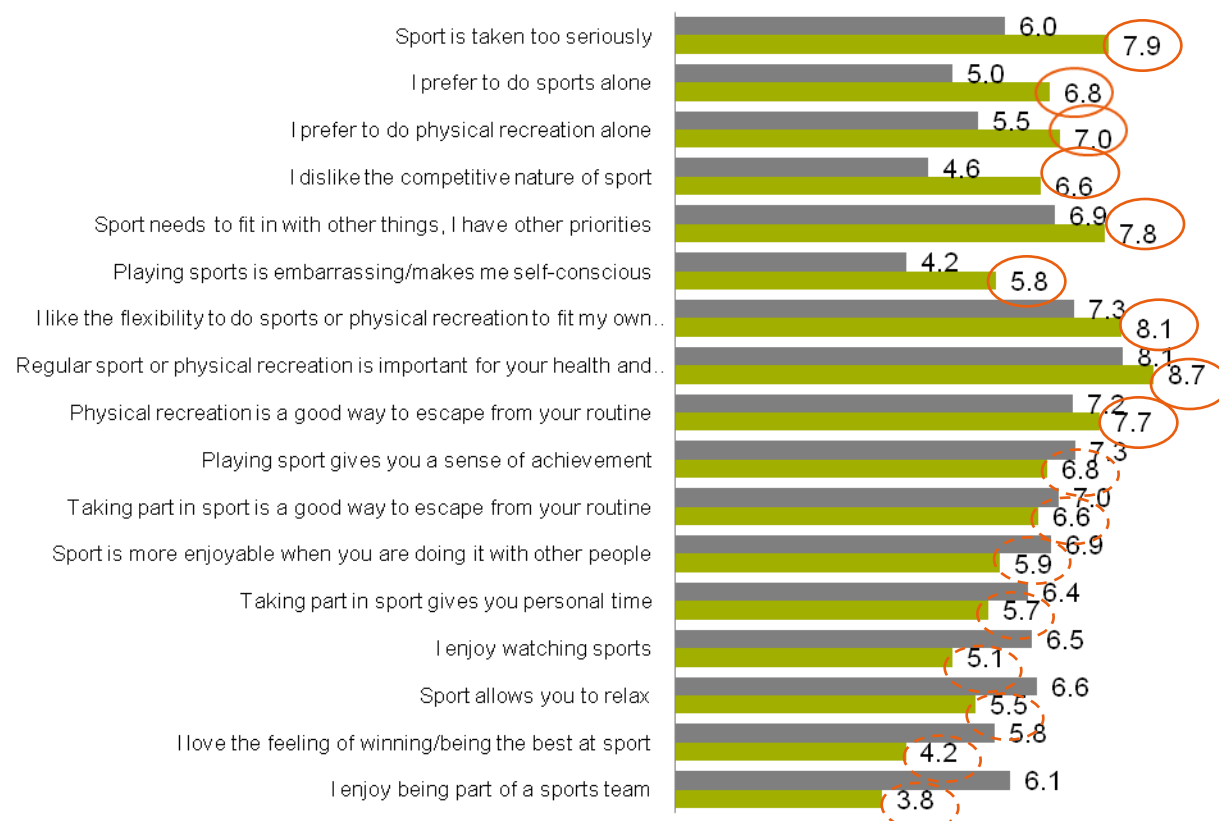
**Income (%)**





It's all about personal health and well-being and the feeling you get from it. As such, it's about physical activity and exercise for self improvement rather than competition against others or 'sport' which they think is taken too seriously. They enjoy the flexibility to fit sports or physical activity around their current schedule.

**Defining attitudes to physical recreation and sport (mean score out of 10)** ■ Total ■ Self Focused



*"My main goal is self improvement."*

*"When I'm active, my competition is myself."*

*"Even when I'm active with or around others, the focus is on myself, how I'm performing and how my body feels."*

*"I like to make my own structure and routines when it comes to activity. That's the only way I can get any type of exercise I want."*

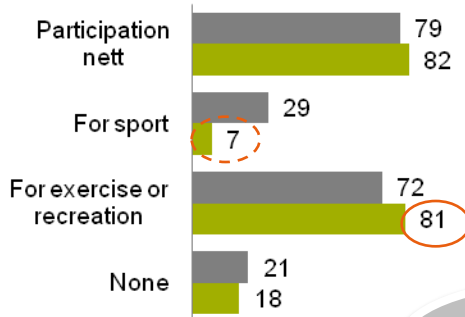


# Self Focused

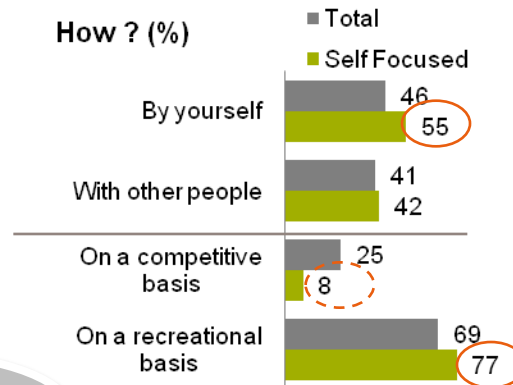
# What physical activity are they currently doing?

The Self Focused are engaged with physical activity and exercise, undertaking it 2 times a week. But they prefer activities they can do on their own and are less inclined towards organised activities, particularly competitive sports and aren't involved in sports clubs.

### Physical activity (%)



### How ? (%)

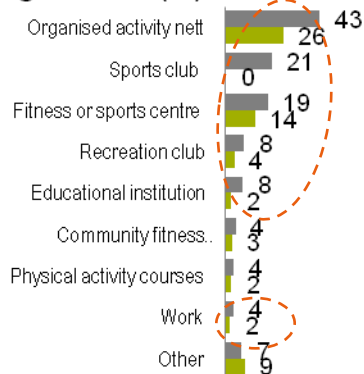


### What they do (%)

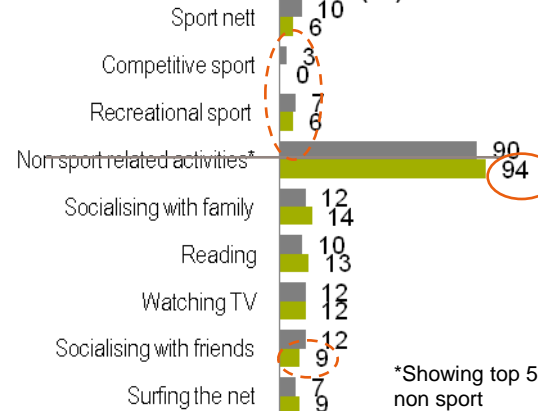
Walking	65
Swimming	23
Gym – as an individual	23
Fishing	18
Bushwalking	17
Cycling	11
Running	11
Yoga	11
Dance	11
Basketball	8

Avg. 3.5 per week vs. 3.3 total

### Organised ? (%)



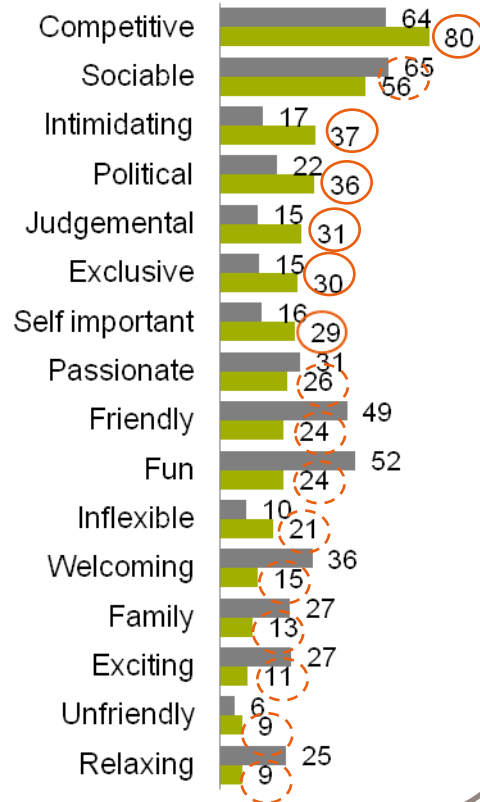
### Main interests/ hobbies (%)



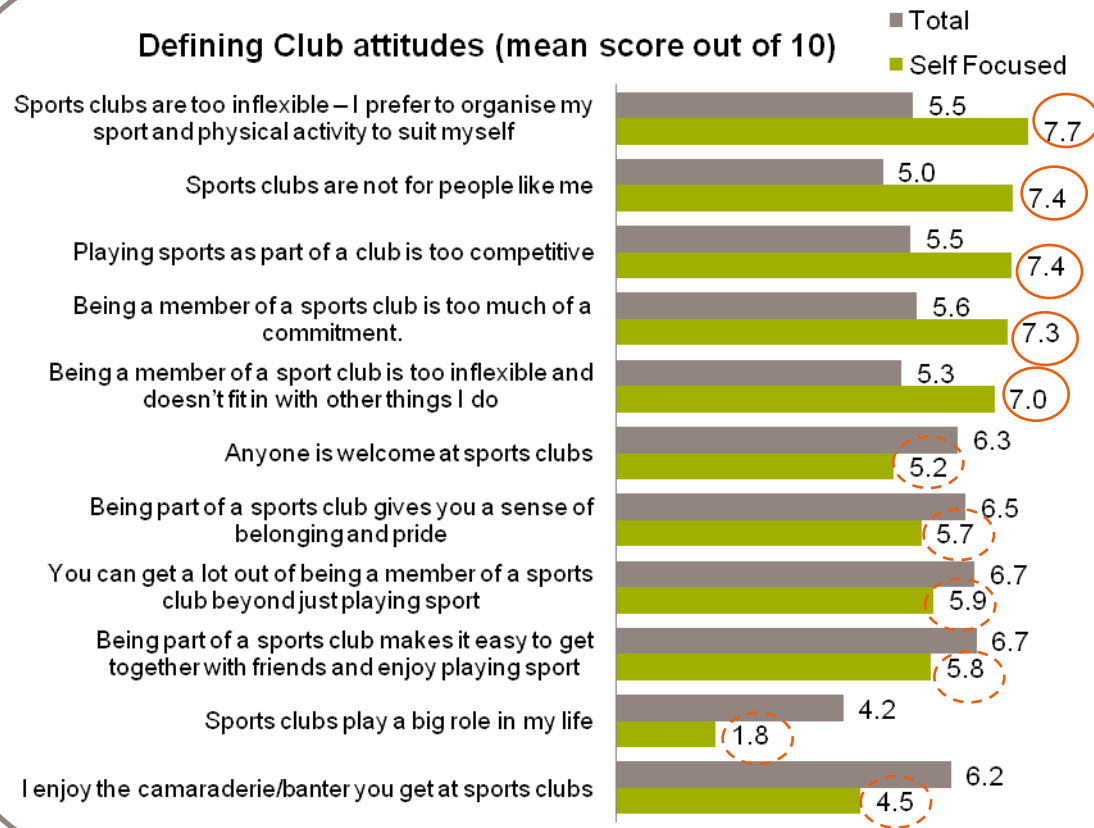
\*Showing top 5 non sport

The Self Focused don't really see how clubs can benefit them given their self focused motivation. They see clubs to be inflexible, requiring too much commitment and are also less likely to look positively on the social aspect of clubs.

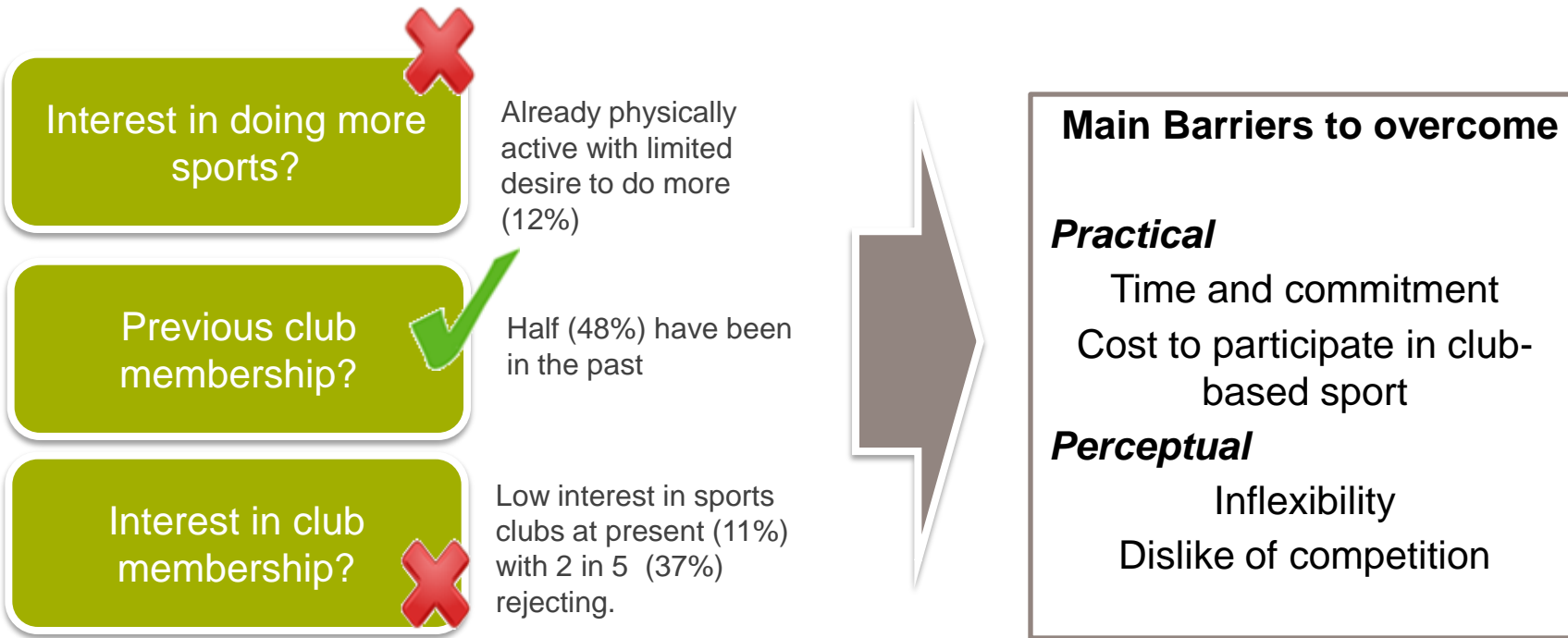
### Associations with clubs (%)



### Defining Club attitudes (mean score out of 10)



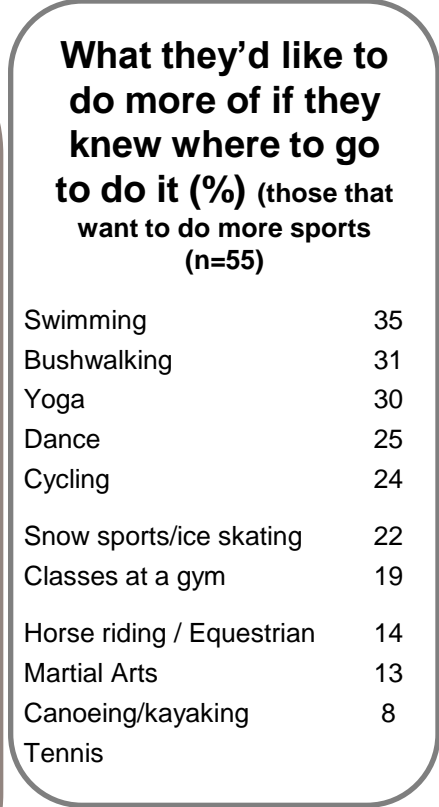
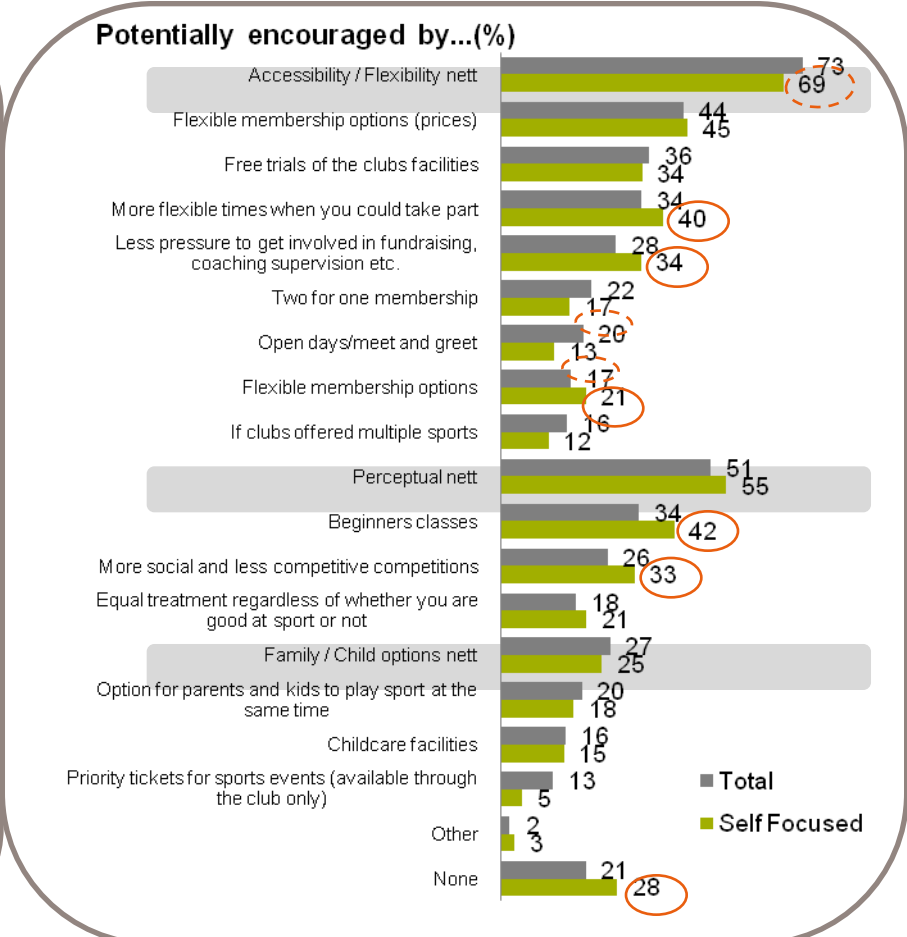
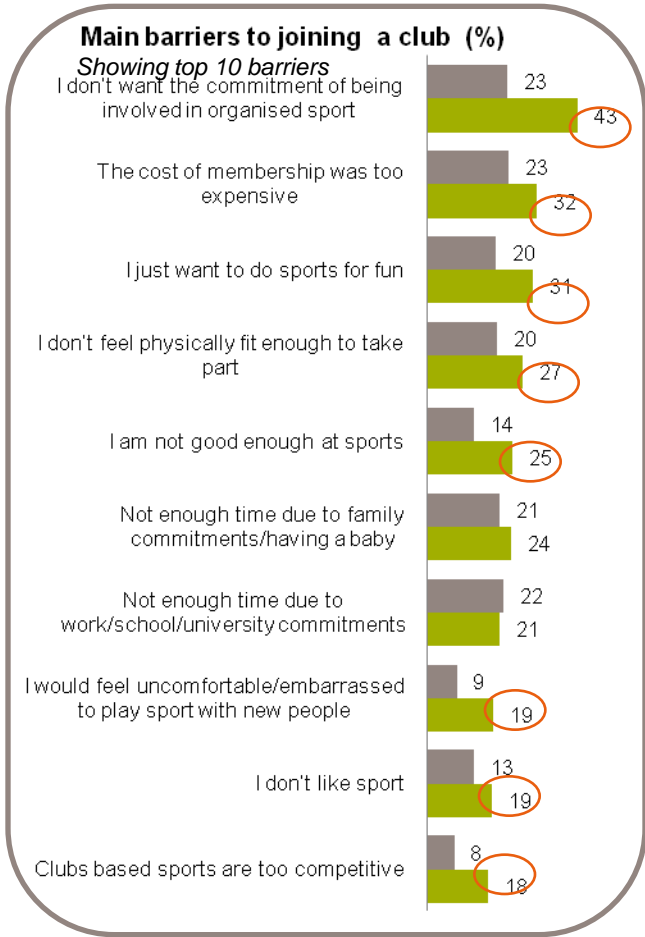
Time is a big factor in why they don't do more physical activity. They have an aversion to 'competition', which they associate with sports and sports clubs. As such, perceived lack of flexibility and competition currently deter them from considering sports club membership.



# Self Focused

# Ideals for club sport participation?

The Self Focused may be tempted by products focused on assisting self –improvement, provided there is flexibility to fit participation into their own schedules. Activities that might interest them, reflect this internal, self directed focus.



## What to talk to them about? (Products)

*Products aimed at individual growth and fitness – rather than teamwork*

*Flexible memberships and schedules*

*Pay as you play*

*Non competitive play*

*Beginner classes*

*Skills improvement classes*

## What to say? (Message areas)

*Clubs promote self growth and help you achieve your fitness / personal goals – in your own time*

*You can have control and flexibility in the memberships and schedules*

*No commitment or excessive cost*

*Try / learn something new in a friendly, non-competitive environment*

*Improve your skills at your own pace*

## How to say it? (Tone)

*Encouraging*

## Where to say it?

Where to look	Total %	Self Focused %
Internet	46	49
Local newspapers	21	22
Ask friends or family	20	19
Preferred means of contact	Total %	Self Focused %
Newspapers	39	41
Online/websites	37	39
Flyers in post-box	35	38
Community notice boards	25	29
Email	31	28
Radio/TV advertising	15	13
Local fairs and fates	11	13
School/University notices/school newsletters	13	11
Sign on days at sports grounds	14	11

# Sport Indifferent





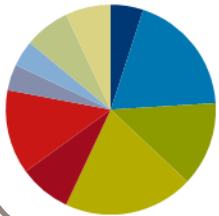
## Pen Portrait

The Sport Indifferent are generally less engaged not only in sport but also other activities, much of which are sedentary or passive. They are indifferent rather than negative towards sport and sports clubs and don't see much benefit in it for them. As such it plays a very limited role in their lives.

They often have had experience of clubs when they were younger and they show a mild degree of interest in getting back involved. That said their general lack of enthusiasm for sport and clubs would make them a relatively time consuming and expensive group to engage.

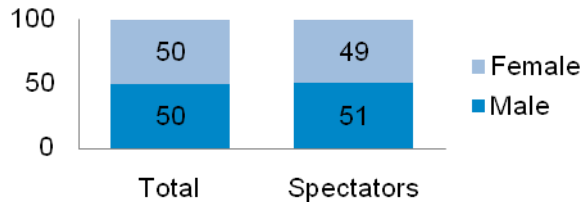
This is one of the larger segments to be found in the population, consisting of 1 in 5 of Australians. They are relatively typical of the population at large with some skew to lower income earners.

**2938,300 Australians aged 14-65 years old**

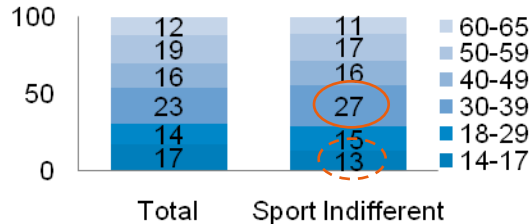


19 % of Australians aged 14-65 years old

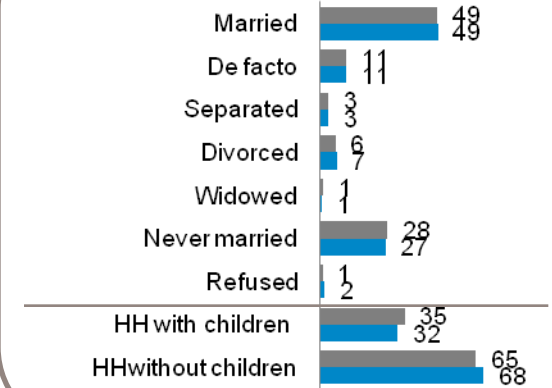
**Gender (%)**



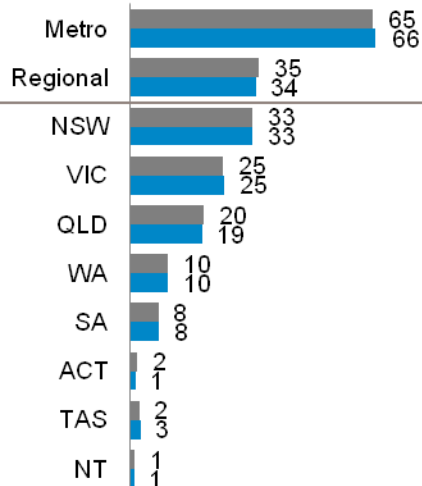
**Age (%)**



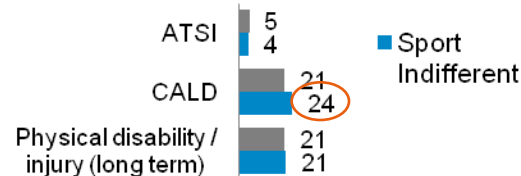
**Life-stage (%)**



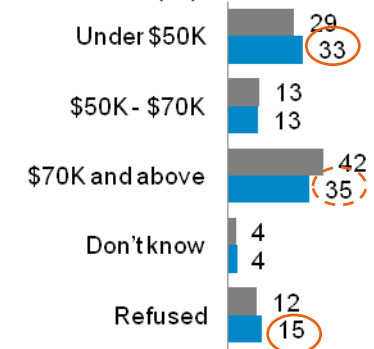
**Resides (%)**



**Special Groups (%)**



**Income (%)**

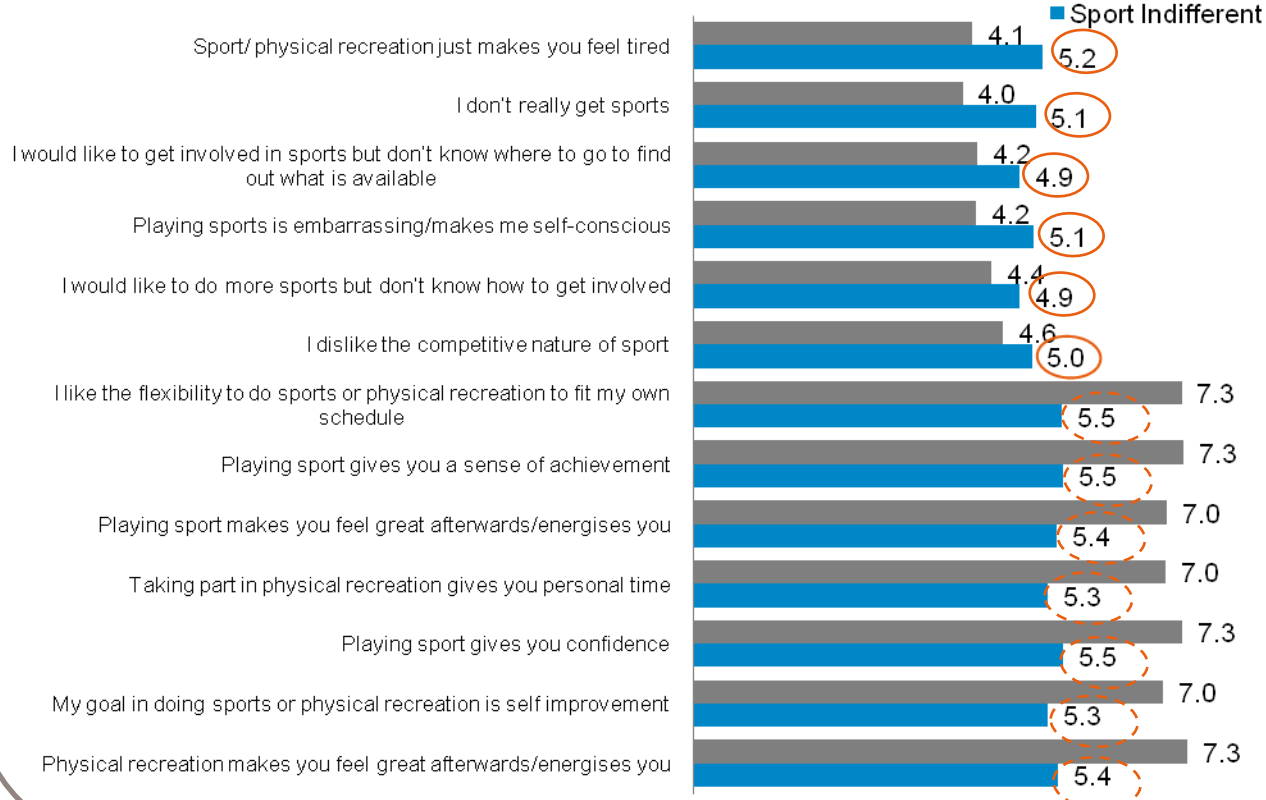






In general they are indifferent about sport, and they see themselves as having other priorities and interests. They sometimes appreciate that sport can offer health and wellbeing benefits but not enough to motivate them to participate.

**Defining attitudes to physical recreation and sport (mean score out of 10)** ■ Total ■ Sport Indifferent



*"I'll follow the team, and give them my support, but I don't like sport or exercise for myself."*

*"I don't need to be a member of the club to be a fan."*

*"I love / enjoy watching sport but I don't play and I don't really do any exercise."*

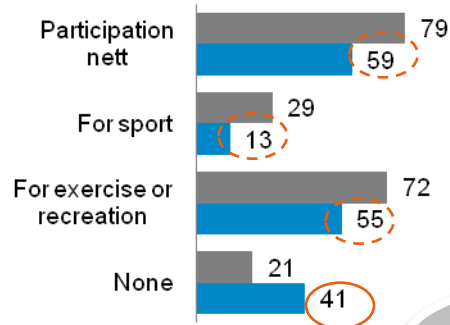
*"I love to watch the kids play in their team on a Saturday morning, but aren't really inclined to play myself"*

# Sport Indifferent

## What physical activity are they currently doing?

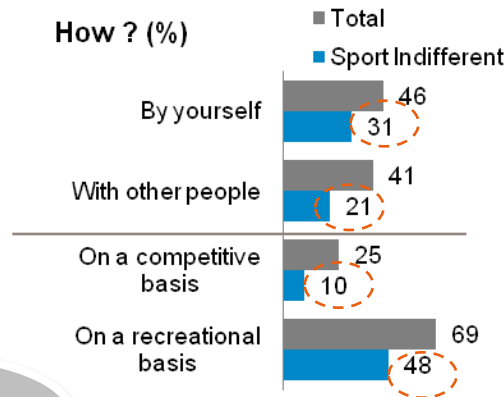
The Sport Indifferent don't take part in a lot of physical activity and when they do it is more likely for recreational purposes and by themselves. Like other less active segments this is reflected in the types of activities which are limited in range, often low impact, can be done alone and without the need for organisation. They prefer reading, watching TV, surfing the internet and socialising with family.

### Physical activity (%)



Avg. 2.2 per week vs. 3.3 total

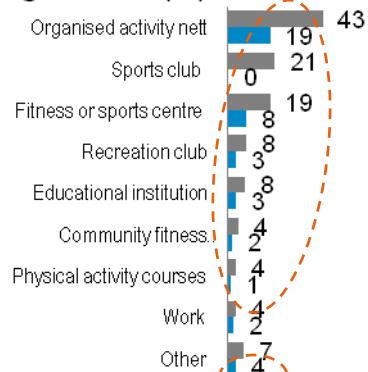
### How ? (%)



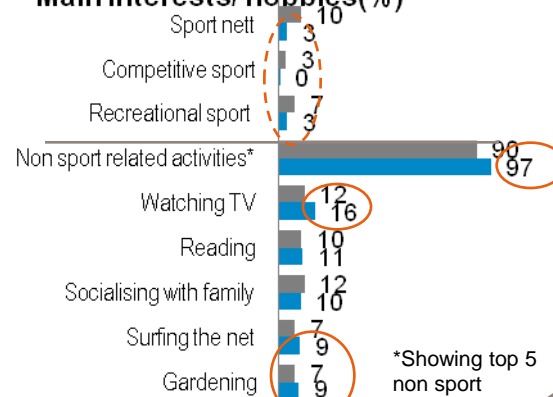
### What they do (%)

Walking	38
Swimming	12
Bushwalking	11
Gym – as an individual	11
Fishing	9
Dance	8
Cycling	6
Running	5
Yoga	5

### Organised ? (%)



### Main interests/ hobbies (%)

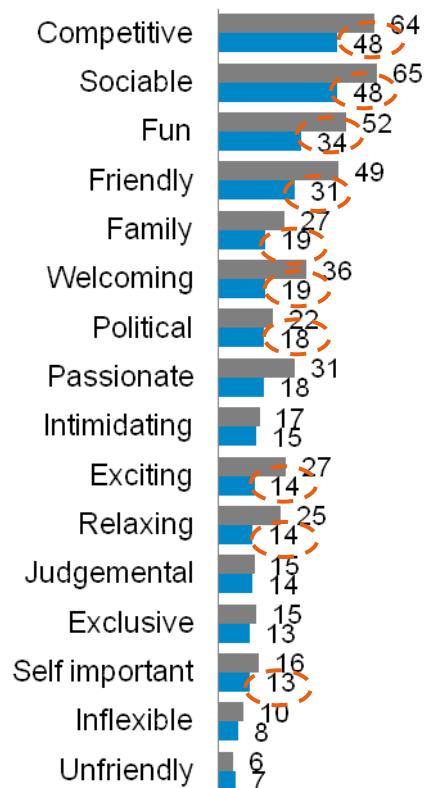


\*Showing top 5 non sport

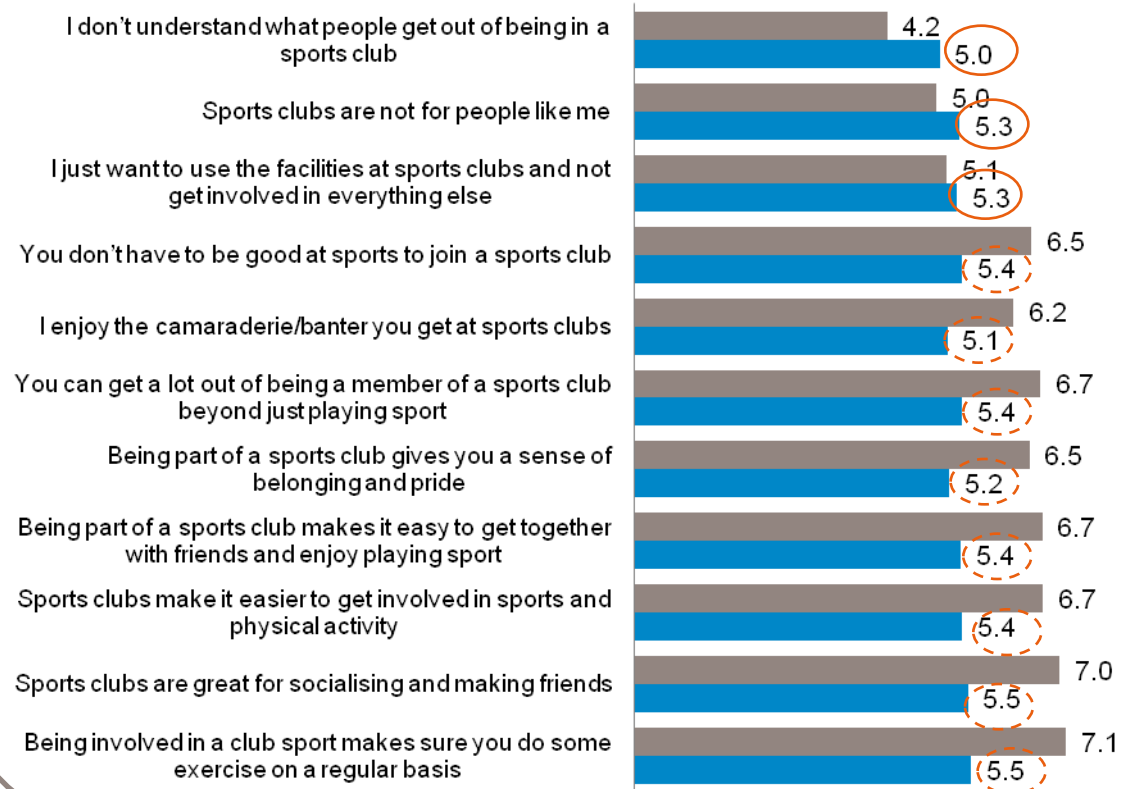


The Sport Indifferent, like the Sport Atheist has few positive associations with clubs. Apart from seeing very few benefits to club membership they are also likely to think that clubs require you to be good at a sport which is another barrier to participation.

### Associations with clubs (%)



### Defining Club attitudes (mean score out of 10)





As with sport, they are also indifferent towards clubs rather than negative – influenced by their lack of engagement with physical activity and sports in general. Time is also a factor.

Interest in doing more sports?



Only 12% want to do more sport and don't know how to go about it

Previous club membership?



Almost half (44%) have been members in the past

Interest in club membership?



Some limited interest in sports clubs at present (22%) extremely or quite interested



## Main Barriers to overcome

***Perceptual (and Personal)***  
General lack of engagement with sport and physical activity



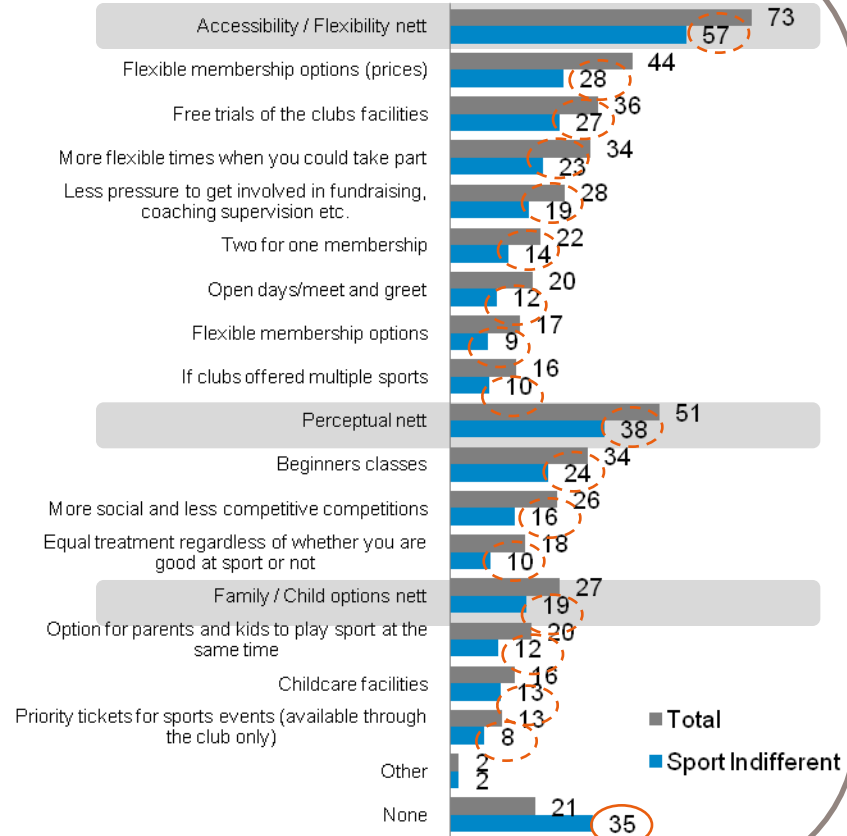
There are a number of potential ways to appeal to them starting with educating them on how physical activity can benefit them. Regarding clubs, free trials, flexible membership or beginners classes could be offered to get them through the door. Their lack of engagement with exercise and physical activity appears to be the main barrier – not their perceptions of clubs.

### Main barriers to joining a club (%)

Showing top 10 barriers



### Potentially encouraged by... (%)



### What they'd like to do more of if they knew where to go to do it (%) (those that want to do more sports(n=70))

Fishing	27
Swimming	20
Yoga	16
Gym – as an individual	13
Tennis	12
Golf	12
Bushwalking	11
Cycling	11
Weight training	11
Gym – take classes	9
Canoeing/kayaking	9

## What to talk to them about? (Products)

*Any marketing to this segment will require an education campaign on how sports / exercise can benefit them mentally and physically*

*How clubs can provide not just a place to participate in sports but social and self improvement aspects – including ‘time out’*

*Products that can be built into their current schedules including flexible memberships and schedules*

*Free Trials to get them in the door*

*Beginner classes*

## What to say? (Message areas)

*Physical activity / exercise / sports is for everyone*

*It helps you feel energised and gives you time for yourself*

*It's not about being good or competitive, it's about finding what you like*

## How to say it? (Tone)

*Encouraging*

## Where to say it?

Where to look	Total %	Spectators %
Internet	46	47
Local newspapers	21	20
Ask friends or family	20	19

Preferred means of contact	Total %	Spectators %
Newspapers	39	31
Online/websites	37	29
Flyers in post-box	35	27
Email	31	24
Community notice boards	25	18
Radio/TV advertising	15	12

# Sport Atheists





## Pen Portrait

Sport Atheists are totally disengaged and often negative about sport and sports clubs. Their physical activity is limited, no more than once a week and typically walking or swimming by themselves.

They don't understand what people get from sport and for them the importance of sport is blown out of proportion. They feel there are more compelling and interesting things in life, which typically involve more sedentary activities.

Their perceptions of clubs, while rarely borne from experience, conjures up visions of unfriendly and intimidating places that could provide absolutely no benefit to them. In their minds there is very little that could be done to persuade them to step inside a club even if they liked sport.

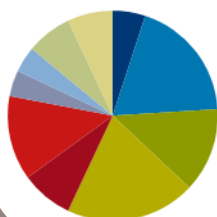
This would be a very challenging segment to engage – in part as it would require a basic education campaign on the benefits of sports / physical activity to personal health and well-being. There are few products or arguments to convince this segment to join a sports club.





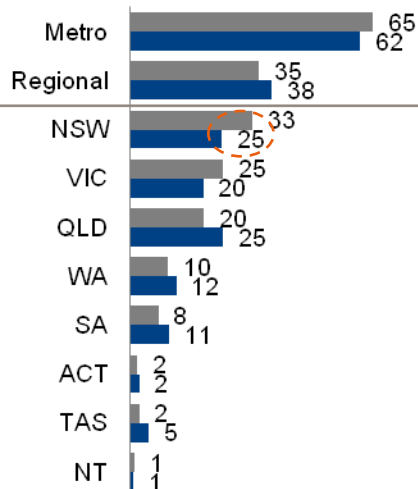
Though a relatively small segment, low participation and negativity towards sport may be magnified due to the segment having more older, low income individuals, with 1 in 3 who have physical challenges.

**844,056 Australians aged 14-65 years old**

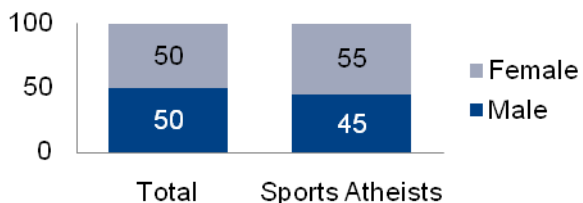


6 % of Australians aged 14-65 years old

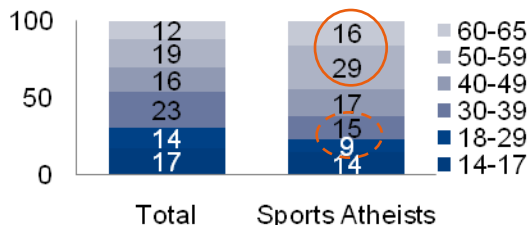
### Resides (%)



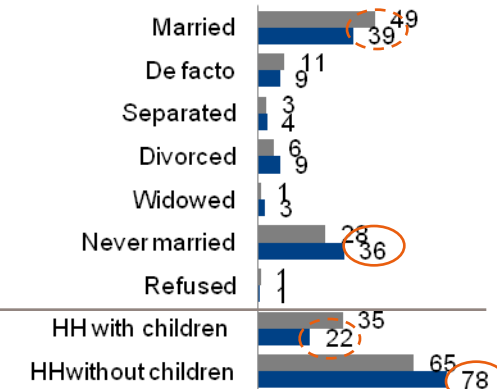
### Gender (%)



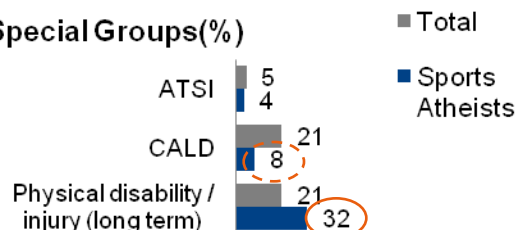
### Age (%)



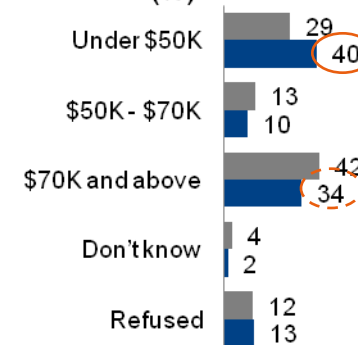
### Life-stage (%)



### Special Groups (%)

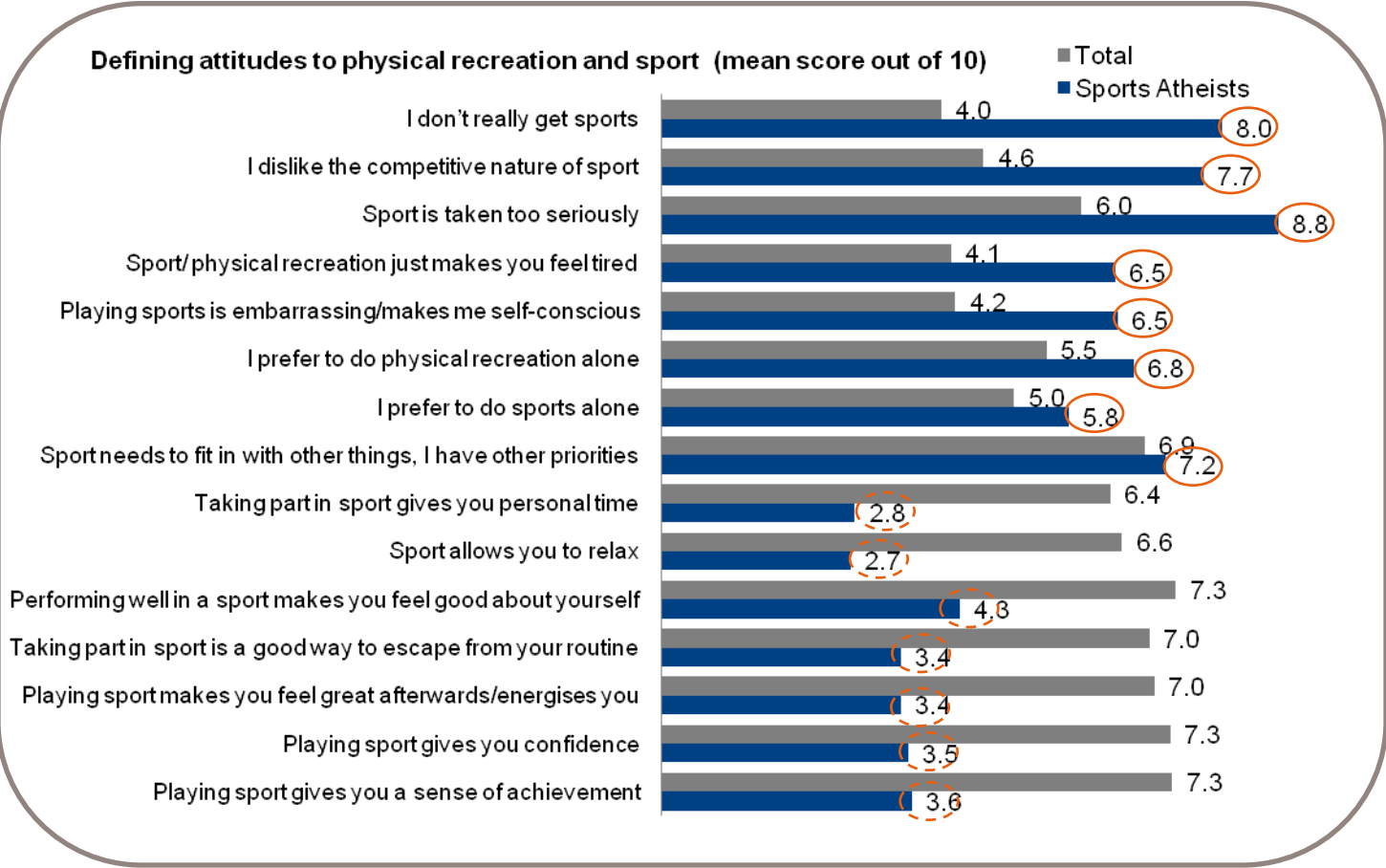


### Income (%)





Sport Atheists often simply don't understand what other people get out of sports or physical activity and have no appreciation of the physical or emotional benefits it might offer. They may have had negative experiences with sport in the past.



*"I have no interest in sport, exercise, gyms or sports clubs."*

*"I don't understand what people get out of sport or sports clubs."*

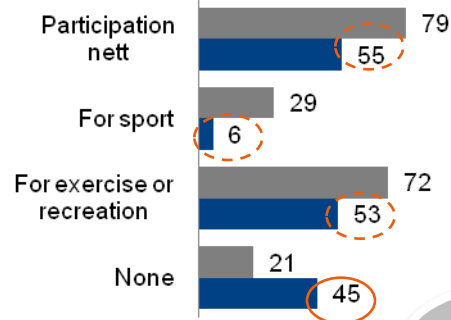
*"I've never really done any sport."*

*"Sport is overrated. There is so many more interesting things to do."*



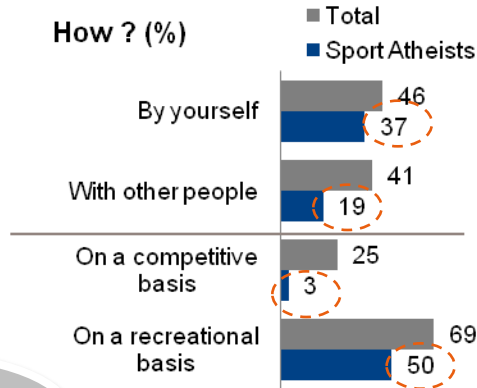
Sport Atheists do relatively little physical exercise and rarely if ever for sport. They take part in a very limited range of activities and typically ones they can do by themselves, such as swimming, walking and bushwalking. They prefer more sedentary activities like reading, watching TV and so on.

### Physical activity (%)



Avg. 2.5 per week vs. 3.3 total

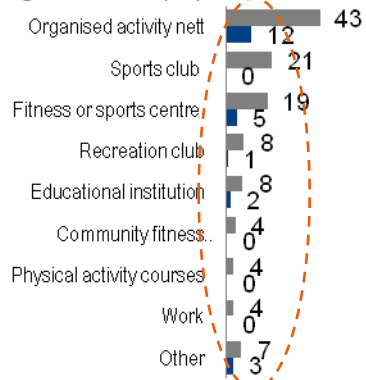
### How ? (%)



### What they do (%)

Walking	38
Swimming	17
Gym – as an individual	17
Fishing	9
Bushwalking	8
Dance	4
Cycling	3
Tennis	3
Yoga	3

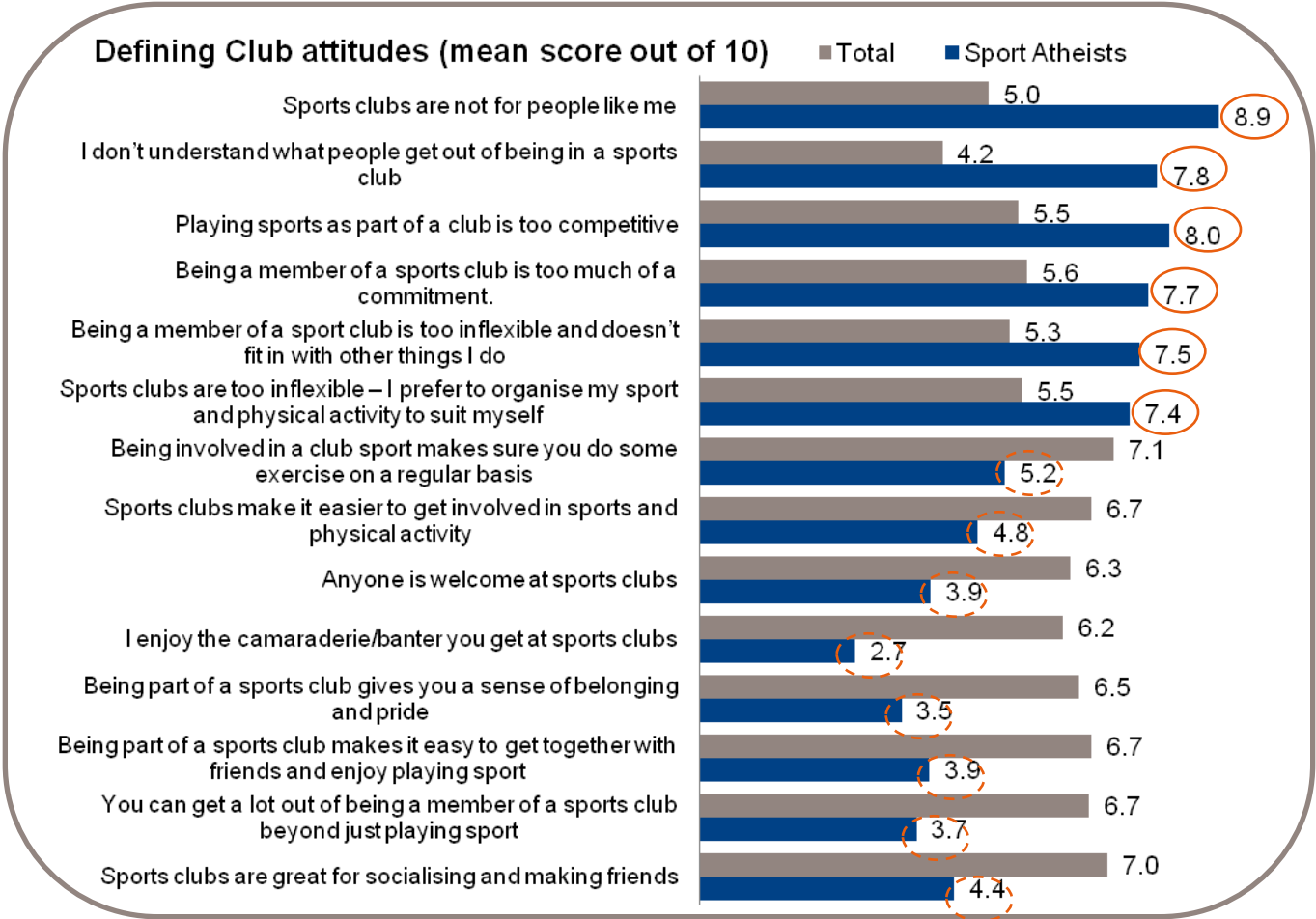
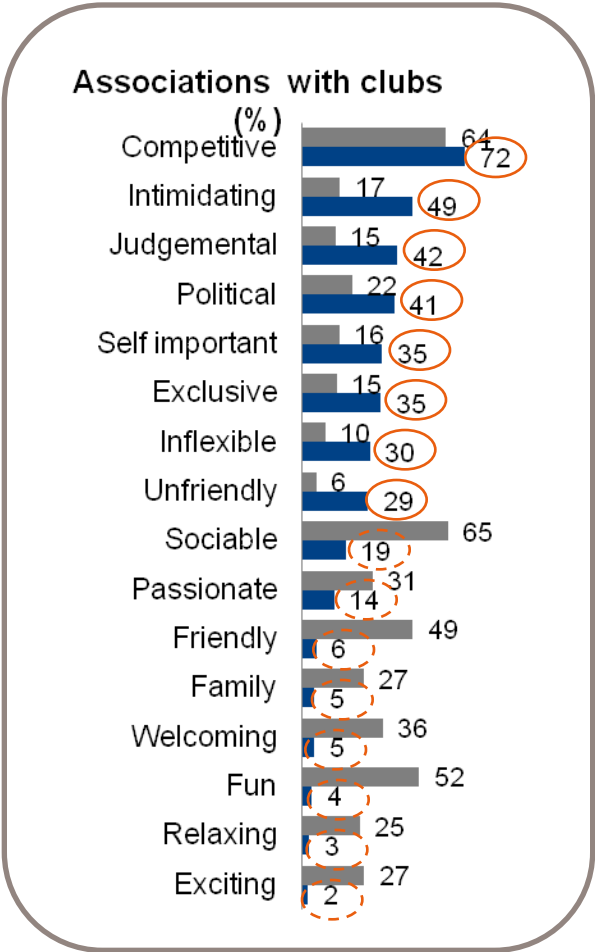
### Organised ? (%)



### Main interests/ hobbies (%)

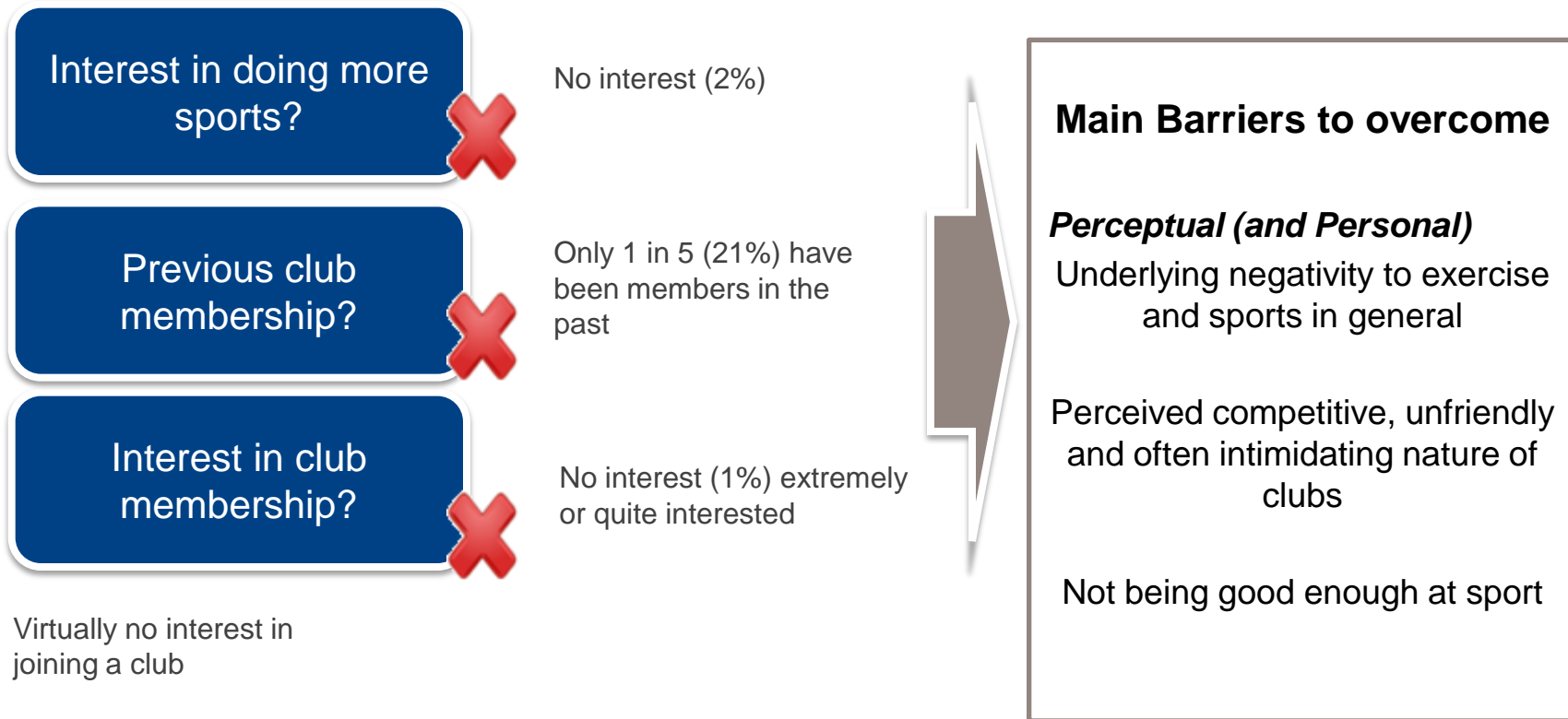


Sport Atheists strongly feel sports clubs are not for them and don't believe there are any benefits to joining a club. This stems from their distain for physical activity and perceptions of clubs being too competitive and also unwelcoming.





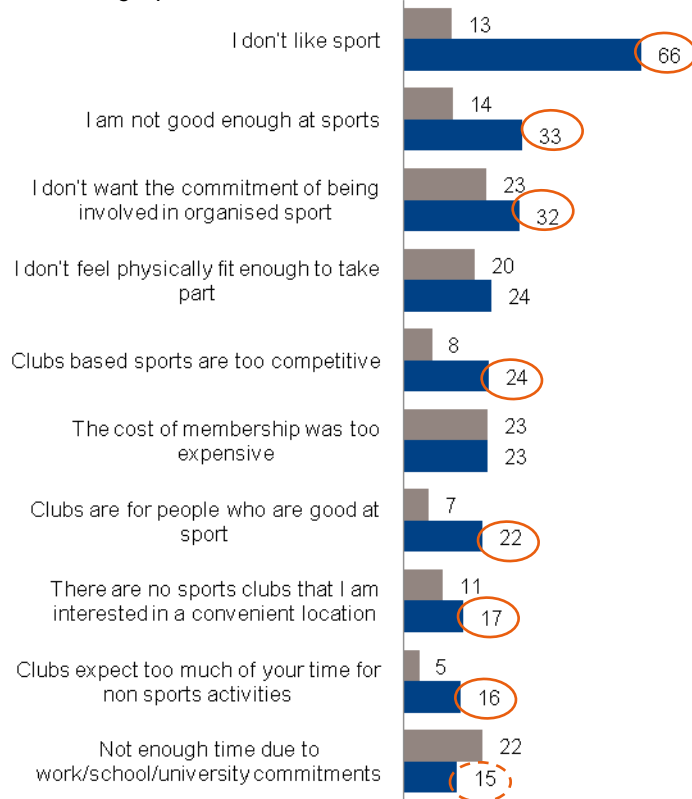
Most have not been members of sports clubs even when younger, the sports club is uninviting and sometimes intimidating. Sports clubs are definitely not for them – they would feel uncomfortable with the expectations and competitive nature of other members and would prefer the flexibility (if they choose to do sport/exercise) of organising activities themselves.



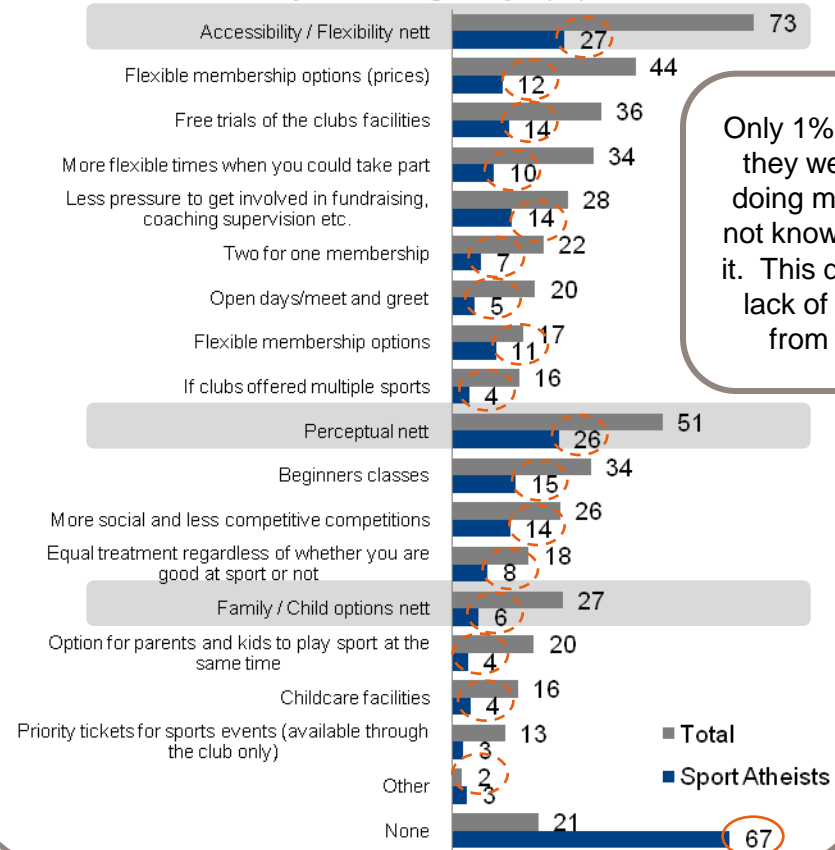
Virtually no interest in joining a club

There is very limited potential for bringing Sport Atheists into clubs and trying to do so would be not be a strategic investment of resources. A less competitive ethos would help but typically these people are antithetical to sport and clubs.

**Main barriers to joining a club (%)**  
Showing top 10 barriers



**Potentially encouraged by... (%)**



Only 1% (n=3) mentioned they were interested in doing more sport but did not know how to go about it. This demonstrates the lack of interest in sport from this segment.

# Marketing to the Sport Atheists

## What to talk to them about? (Products)

*Firstly, any marketing to this segment will require an education campaign on how sports / exercise can benefit them – and even then this segment seems fairly set in their ways...*

*Initial focus on activities that are not competitive (can do by themselves)*

*Opportunities to experience how exercise and sports can be enjoyable – with no pressure*

*Beginner classes or classes with a clear level to reduce apprehension of being 'not good enough' etc*

## What to say? (Message areas)

*Physical activity / exercise / sports is for everyone*

*It's not about being good or competitive, it's about finding what you like – no expectations*

*Something for everyone – of all levels and of all interests*

## How to say it? (Tone)

*Encouraging and reassuring*

## Where to say it?

Where to look	Total %	Sport Atheists %
Internet	46	40
Local newspapers	21	21
Ask friends or family	20	20
Preferred means of contact	Total %	Sport Atheists %
Online/websites	37	26
Newspapers	39	21
Flyers in post-box	35	19
Community notice boards	25	17
Community notice board	25	17
Email	31	11
Radio/TV advertising	15	9
Sign at sports ground	14	5

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**Australian Government**  

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