



**Australian Government**  
**Australian Sport Commission**

# Market Segmentation Pilots

## CASE STUDY 6 - SKATEBOARDING

### MARKET SEGMENTATION FOR SPORT PARTICIPATION



## INTRODUCTION

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

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

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


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

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

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

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

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



Further information about the market segmentation research is available at –

[https://secure.ausport.gov.au/clearinghouse/research/national\\_sport\\_research/market\\_segmentation\\_-\\_adults](https://secure.ausport.gov.au/clearinghouse/research/national_sport_research/market_segmentation_-_adults)

[https://secure.ausport.gov.au/clearinghouse/research/national\\_sport\\_research/market\\_segmentation\\_-\\_children](https://secure.ausport.gov.au/clearinghouse/research/national_sport_research/market_segmentation_-_children)

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



# Case Study 6 – ‘SKATEBOARDING’ WITH SKATE AUSTRALIA

## BACKGROUND

Skateboarding Australia (SbA) is based on the Gold Coast, Queensland and currently has approximately 12 000 members nationally. There is also an estimated 1.3 million Australians skateboarding recreationally. Recent research indicates an increase in popularity in action sports including skateboarding and this is reflected in the general rise in participation numbers over the last few years. SbA has instituted what it’s titled a ‘hub’ strategy whereby programs and services are offered around specific community skate facilities (aka ‘hubs’) which has been very successful in targeting 5 to 14 year olds. Importantly, in order for their children to access programs and services at these hubs, parents are required to complete participation forms that allow SbA to capture individual participant data that allows them to monitor and profile participants and target their marketing and communication.

A major benefit of this mode of sport participation is that skateboarding is not constrained in the way traditional sporting clubs are by limited access to facilities and rigid training and game scheduling. For many segments in the sport participation market, these constraints are significant barriers to participation. Through its facility hub model, Skateboarding is able to offer its members access to a variety of programs at different locations and times allowing a better fit with lifestyle pressures around family, study, work and other commitments.

## APPROACH

SbA targeted the Ponderers segment during this school-based pilot. Market segmentation research has identified the key messages that will attract Ponderers:

- sport participation that is fun and social
- membership /participation for all, regardless of skill level / competency
- being able to participate in their own time

The Ponderers segment was identified because it lends itself to non-traditional, more flexible sports such as skateboarding. As one of the coaches in the program explained, skateboarding’s individual, self-driven focus is great for children that “...might not be the one that gets the try or the goal all the time. They can just go at their own pace and have fun.”

Another coach explained a key attraction for children is that skateboarding has “...no limits, no rules and no refs.” The sports’ ability to allow children to participate at their own pace and learn a repertoire of skills in a fun environment does a great job of satisfying a child’s sense of accomplishment, development and enjoyment and is therefore highly attractive to them.

A pilot program was held at Nerang State School on the Gold Coast; SbA delivered two concurrent eight-week programs at the school during term three in 2013. Operating once per week during school hours, and as part of the AASC program on a Wednesday after school, the program provided a fun alternative to the traditional sports on offer.



The programs were designed for an absolute beginner with no skateboarding experience. Delivering the program at the school had numerous benefits including the children being able to participate in a familiar and a safe environment with their friends, whilst parents were able to watch and/or get involved. This delivery model also helped to improve any negative perceptions that parents might have had about the sport and broader skate park use.

## RESULTS

Feedback from the students that participated in the program was overwhelmingly positive with consistent feedback highlighting a very high level of enjoyment as well as considerable satisfaction with the new 'tricks' that they had learned. In addition to consistent comments about the program being "...really fun", children repeatedly alluded to the satisfaction they gleaned from the sense of development and self-improvement that skateboarding provides.


The main reason many of the children were attracted to the program was that it was "a different, more attractive way of playing sport". Ease of access, in terms of location and the timing of the program, was also listed as substantially contributing to making the program considerably more attractive.

Staff at the school also expressed high levels of satisfaction with the quality of program delivery and the standard of coaching. The school was also extremely supportive of the initiative and expressed interest in continuing the program in the future.

The school principle said "The participants absolutely loved the program! ...the thing that really stood out was the engagement of the children in the activity. They wanted to learn as much as they could from every lesson."

SbA's regular 'learn to skate clinics' were promoted during the program in order to provide participants with an opportunity to continue frequent engagement; six out of 28 participants in the in school program, and six out of 25 in the AASC program have since attended a hub session. When asked about skateboarding outside of the program, many participants commented that they had taken it up more regularly and purchased their own skateboards.

The pilot also highlighted to SbA that there are opportunities away from the skate parks to promote and deliver skateboarding programs and that they can be implemented even with limited facilities (i.e. utilizing multipurpose courts like those used at Nerang).



# WHERE TO FROM HERE?

More information can be found at [www.researchinsport.com.au](http://www.researchinsport.com.au)

For our sport sector partners, a copy of the full Market Segmentation for Sport Participation report can be obtained by contacting [asc\\_research@ausport.gov.au](mailto:asc_research@ausport.gov.au)

