



MARKET SEGMENTATION FOR SPORT PARTICIPATION CHILDREN AGED 5-13 YEARS OLD

Segment Descriptions

Overview

- This booklet provides a basic overview of sport and sports club market segments within the Australian population aged 5-13 years old.
- A booklet about the Australian population aged 14-65 years is provided in a separate document.
- 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 of children aged 5-13 years 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 (5-13 year olds)

- The data collection for children aged 5-13 years old occurred in two parts. Firstly, a sample of children (n=505) were surveyed as part of a wider population survey in June 2012. This survey was further boosted in December 2012 with a sample of n=1001 children.
- In the initial round of interviewing no quotas were set for the 5-13 year old interviews. In the boost interviewing phase, representative quotas 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 and achieved for special audiences (for Culturally and Linguistically Diverse (CALD) individuals n=136, and for and Indigenous Australians n=16).
- These quotas were based on the ABS population estimates: 3101.0 - Australian Demographic Statistics, as at Jun 2011* 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 1506 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 2.52% percentage points, plus or minus, from the result that would have been obtained from a census of the entire population (using the same procedures).

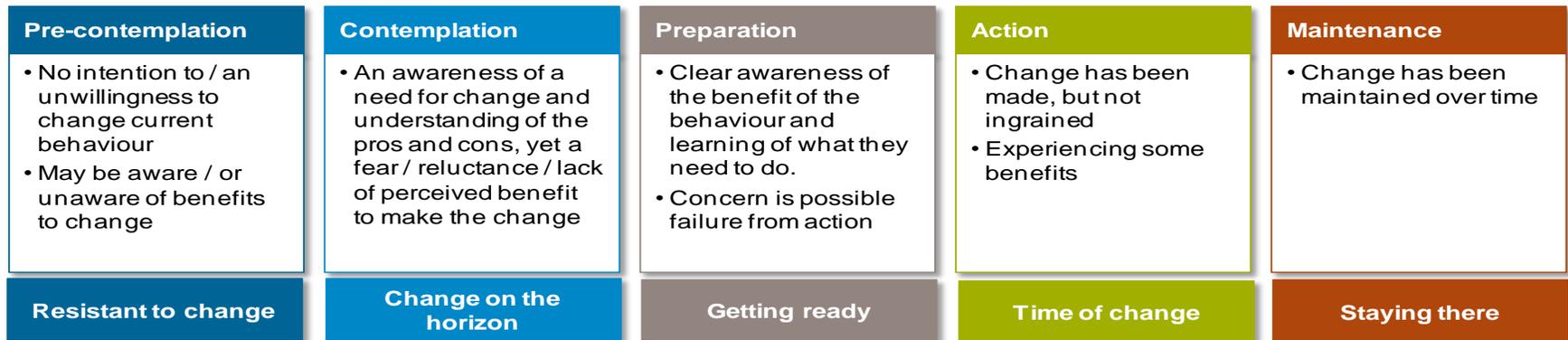
Reporting groups	Sample size	Maximum margin of error +/- at 50%
Total 5-13 years old	1506	2.52%
Sport Resistant	330	5.39%
Ponderers	323	5.45%
Thrifty Enthusiasts	72	11.55%
Apathetic Clubber	229	6.48%
Sport Driven	202	6.89%
Social Loyalists	350	5.24%

*Population figures were retrieved in July 2012. Please note that these estimates are periodically updated by the ABS.

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:

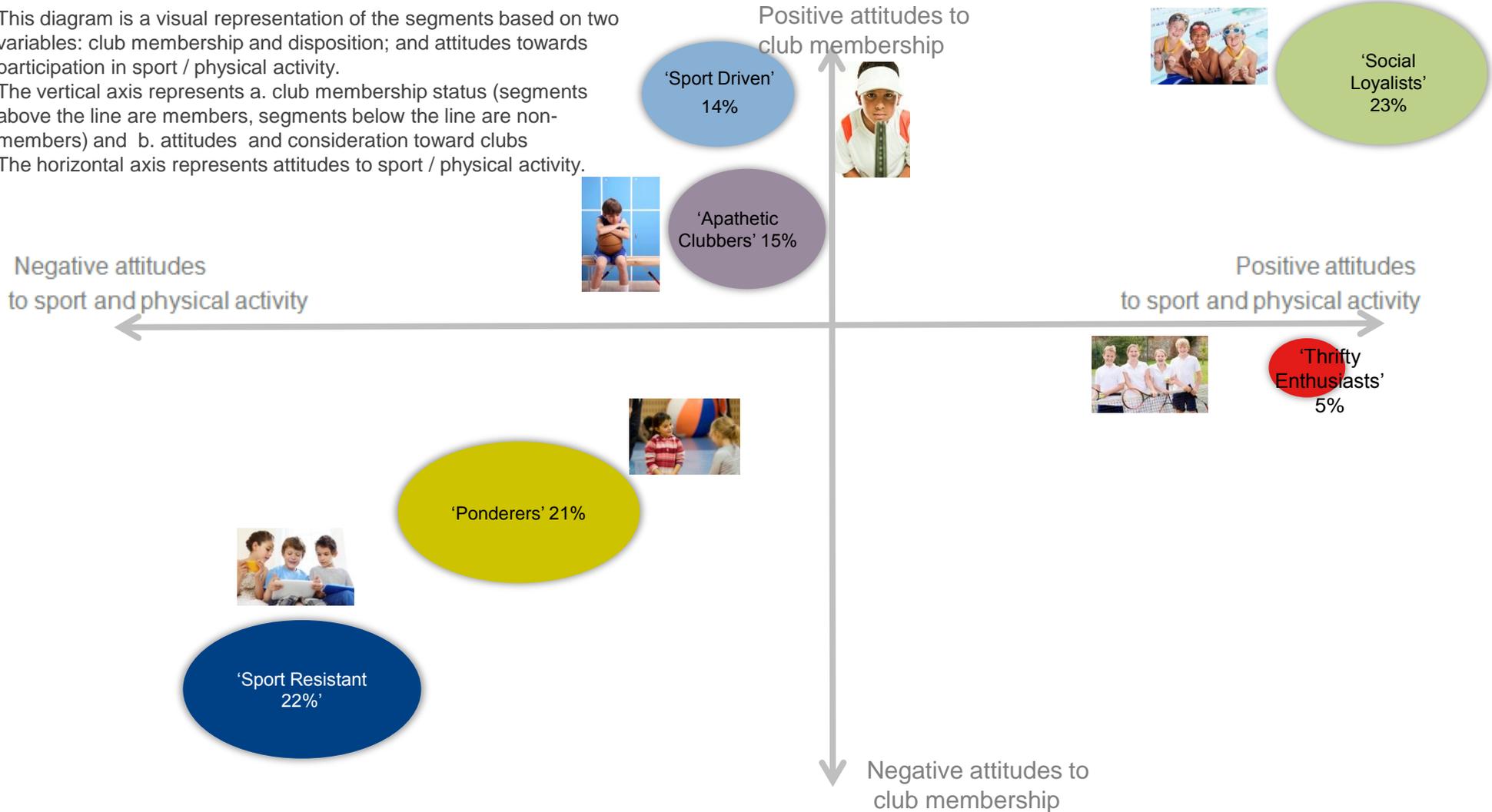
- What the motivators to club membership are and how to reinforce these motivators
- What products and services could encourage renewal of club memberships
- What communications are needed to support these
- Those most at risk of lapsing their club membership, and the challenges that must be overcome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

A snapshot of the segments – club membership and physical activity

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.

Club members

Non club members

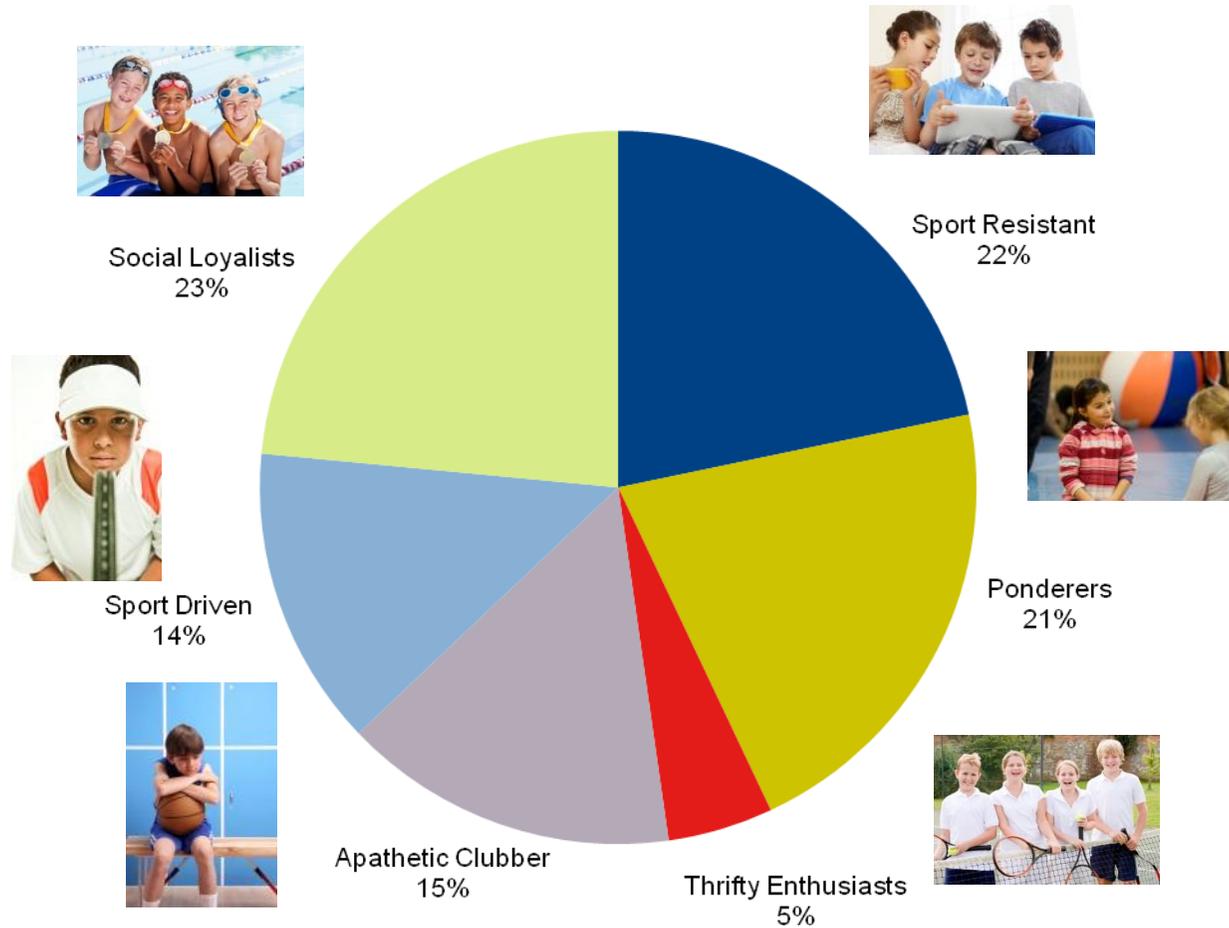


How to identify the segments

Club Members		Social Loyalists	<i>"Sport clubs are the best! I love to be able to play sports and do it with friends"</i>	
		Sport Driven	<i>"I like being part of a club to play sports but they sometimes want you do other stuff and that's annoying"</i>	
		Apathetic Clubbers	<i>"I don't mind playing sport with my club but I'm a bit over it"</i>	
Non club Members	Potentials		Thrifty Enthusiasts	<i>"Sport is great and so are clubs – I'd like to be part of a club again"</i>
			Ponderers	<i>"I'd like to do more sport but I don't really know how"</i>
	Non Potentials		Sport Resistant	<i>"I don't really like sport, people just want to win"</i>

Segmentation of Australian children 5-13 years old

% of the Australian population



Segment	Estimated Population figures
Social Loyalists	581,086
Sport Driven	337,001
Apathetic Clubbers	374,996
Thrifty Enthusiasts	117,490
Ponderers	526,617
Sport Resistant	537,374

A snapshot of the segments – demographic

Column %	Total 5-13 (n=1506)	Sport Resistant (n=330)	Ponderers (n=323)	Thrifty Enthusiasts (n=72)	Apathetic Clubber (n=229)	Sport Driven (n=202)	Social Loyalists (n=350)
Male	50	<u>45</u>	<u>45</u>	45	48	<u>61</u>	<u>56</u>
Female	50	<u>55</u>	<u>55</u>	55	52	<u>39</u>	<u>44</u>
5-7	33	32	<u>42</u>	32	34	28	<u>27</u>
8-10	33	30	28	33	32	35	<u>39</u>
11-13	34	37	<u>29</u>	35	33	37	34
ATSI	2	2	2	3	2	4	<u>1</u>
CALD	16	15	<u>21</u>	16	13	<u>22</u>	<u>9</u>
NSW	24	21	22	28	23	26	25
VIC	23	22	25	30	18	24	22
QLD	21	24	24	21	19	<u>12</u>	<u>21</u>
WA	12	10	11	12	12	16	14
SA	12	15	<u>9</u>	<u>3</u>	<u>17</u>	14	11
TAS/ACT/NT	9	8	10	6	11	8	7
Metro	67	65	69	73	68	69	65
Regional	33	35	31	27	32	31	35
Club member	52	<u>0</u>	<u>0</u>	<u>0</u>	<u>100</u>	<u>100</u>	<u>100</u>
Non club member	48	<u>100</u>	<u>100</u>	<u>100</u>	<u>0</u>	<u>0</u>	<u>0</u>
Under \$50k	19	<u>30</u>	21	22	18	15	<u>12</u>
\$50k-70k	16	<u>21</u>	<u>21</u>	16	<u>12</u>	18	<u>10</u>
\$70k plus	50	<u>35</u>	<u>44</u>	48	56	56	<u>62</u>
Demographics and profiling							

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	Socially Loyalists	Increasing / maintaining enthusiasm and involvement through social aspects of club	Products and opportunities that address the social aspects of sport – plus advocacy / referrals for clubs
	Sport Driven	Retention by increasing flexibility and focus on the sport	Products and opportunities for sport participation that are more flexible
	Apathetic Clubbers	Retention by reducing perceived over emphasis on competition by rein stilling the fun elements	Products and opportunities for non competitive sport participation
Non club Members	Thrifty Enthusiasts	Trial by encouraging active consideration and trial by addressing cost and value for money	Trial offers and costing options that address flexibility of membership and value for money
	Ponderers	Encouraging consideration and trial by providing information on how to participate while promoting social and fun options	Provide information on clubs and club participation and trial offers and products for more entry level participants
	Sport Resistant	Raising awareness by educating on benefits of sport and exercise	Provide education/information and products that cater to entry / beginner level opportunities



CHILDREN'S SEGMENT PROFILES

The segment opportunities for sport club membership

- The following slides will provide a summary of the 6 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

- Social Loyalists
- Sport Driven

Segments of existing club members where the focus is retention

- Apathetic Clubbers

Non sport club members

Segments of non club members with high potential for acquisition

- Thrifty Enthusiasts
- Ponderers

Segments of non club members with low potential for acquisition

- Sport Resistant

How the segments have been profiled

- The following slides will provide a summary of the 6 segments in terms of:

Club members

- Pen profile of the segment (summary of the segment).
- What do they look like? (key demographics and parents 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).
- Their parents' relationship to clubs? (current membership and attitudes to 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 and parents 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 parents' relationship to clubs? (current membership and attitudes to clubs).
- Potential for acquisition? (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

Social Loyalists





Pen Portrait

Social Loyalists make up a quarter of the population aged 5- 13 years old. They are more than likely to be male and from higher income households (over \$70k plus per annum). They are underrepresented by CALD individuals.

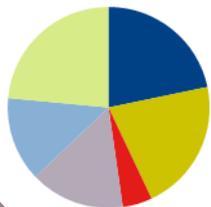
Social Loyalists are highly engaged with sport and love being part of a sports team, enjoying all facets of sport, physical, mental, social and competitive. Clubs are a big part of their life and identity. They enjoy all aspects of club participation (physical, social, for self improvement). They are more likely than other club member segments to have joined for the sheer fun/enjoyment. Other motivations are to get exercise, to advance their skill in that sport and to try a new sport. The decision to join is typically a joint decision with parents, many who are club members themselves.

This is the core of club members and the focus should be on retention or encouraging further involvement through other sport clubs . Clubs should provide opportunities to challenge themselves while having fun with other children. This segment are also social advocates so clubs can consider referrals or bring a friend opportunities. Although cost of participating in club-based sport is less of a barrier for parents of this segment, membership options that make it easier for the whole family to join will help to ensure continued membership over time.



Social Loyalists make up a quarter of the population aged 5- 13 years old. They are more than likely to be male and from higher income households (over \$70k plus per annum). They are underrepresented by CALD.

581,086 Australians aged 5-13 years old



23% of Australian children aged 5-13 years old

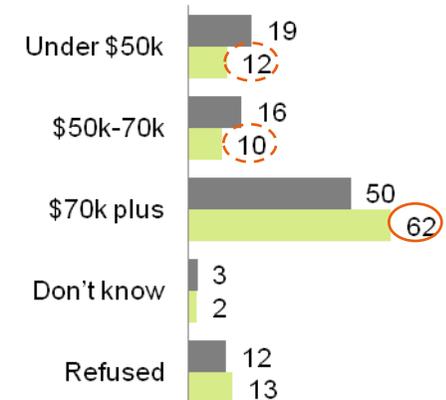
Gender (%)



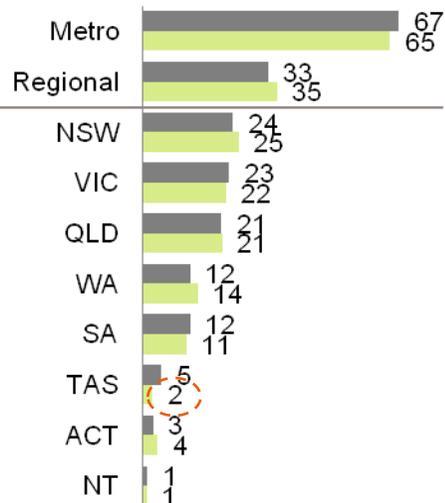
Age (%)



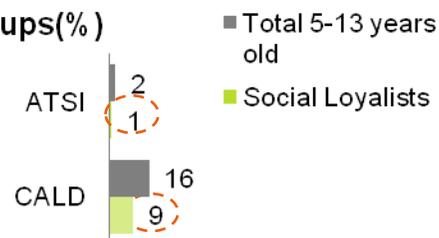
Parents profile (%)



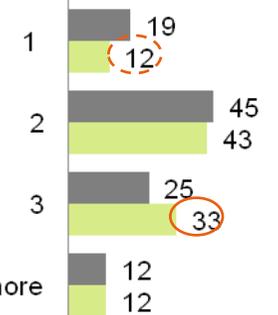
Resides (%)



Special Groups (%)



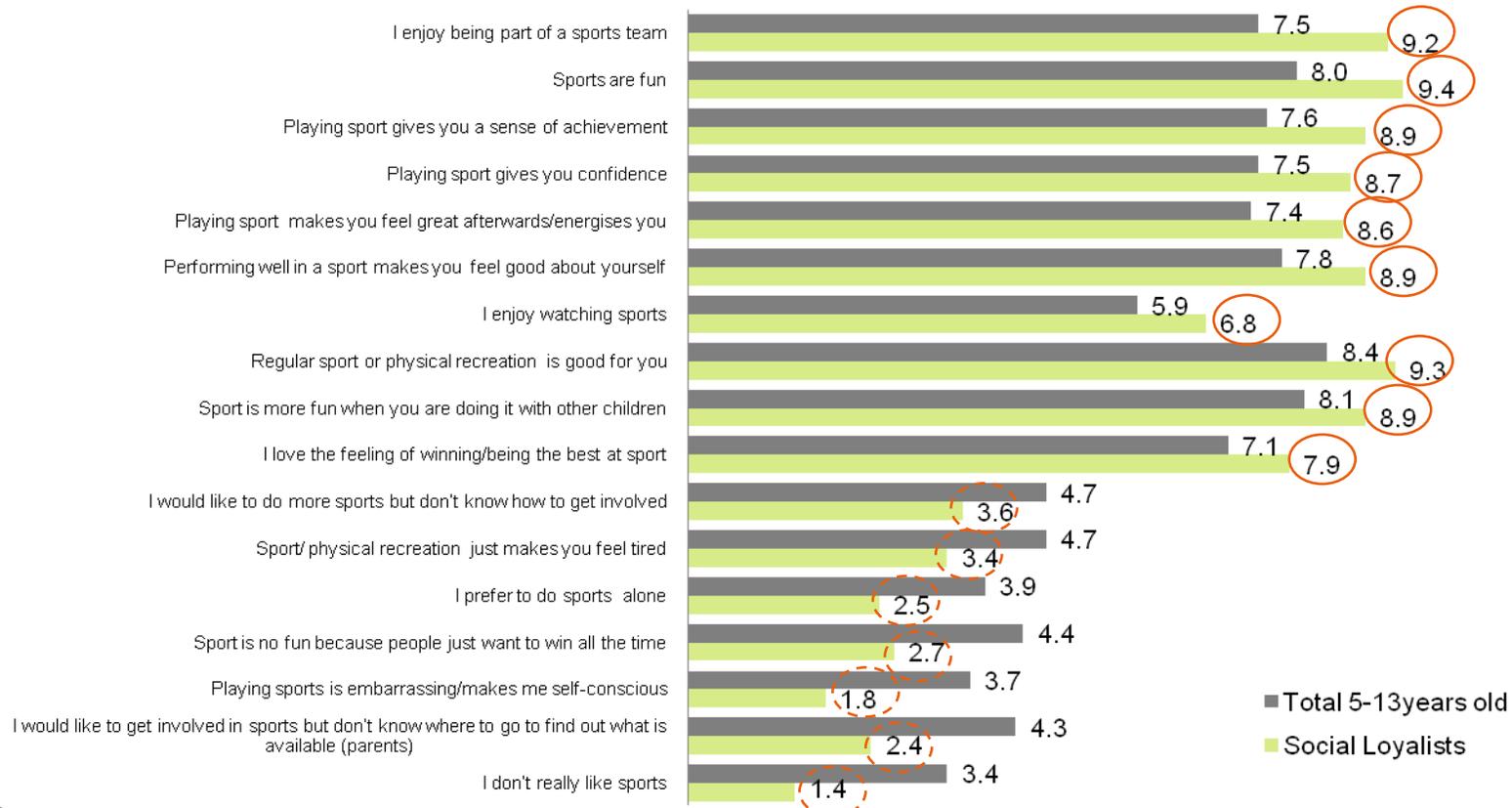
Number of children in Household





Social Loyalists are highly engaged with sport and love being part of a sports team. They enjoy all facets of sport, physical, mental, social and competitive. There are few barriers to sport participation.

Defining sports attitudes (mean score out of 10)



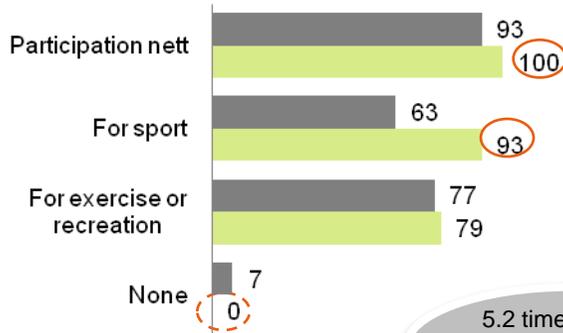
Social Loyalists

What physical activity are they currently doing?



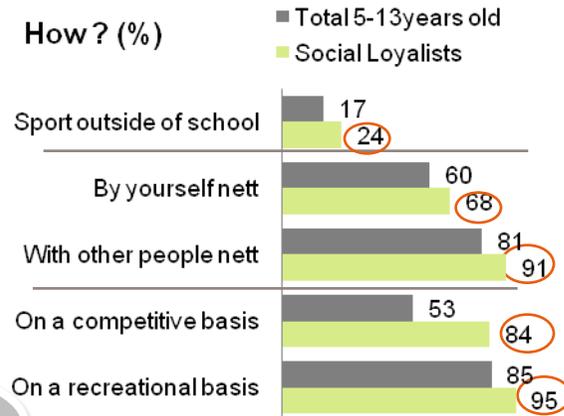
Social Loyalists are the most active of the segments in sport and nearly 1 in 2 consider sport to be a main hobby or interest. That said, They participate in a range of activities, including team based sport, which they typically do with other people and competitively. They partake in physical activity / sport 5 times a week.

Physical activity (%)



5.2 times a week
(vs.3.8 for total)
(exc. walking to school)

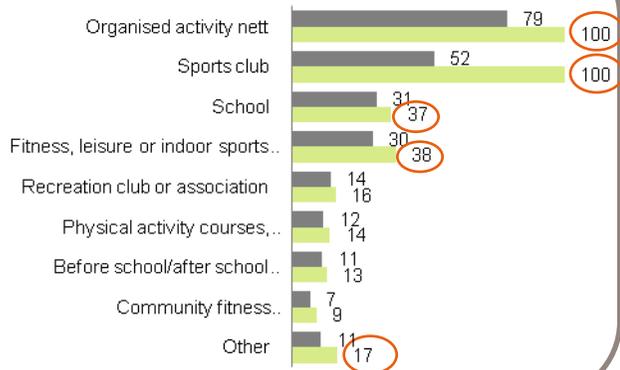
How? (%)



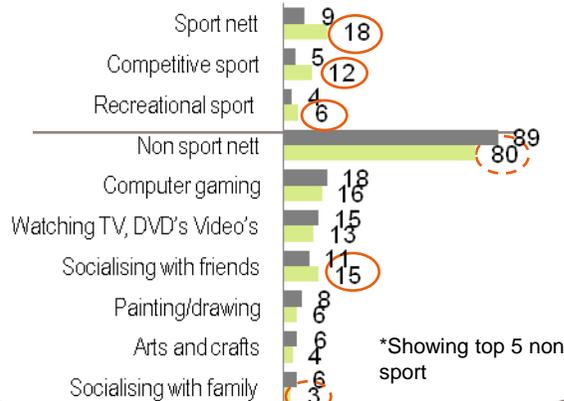
What they do (%)



Organised? (%)



Main interests/ hobbies (%)



Social Loyalists

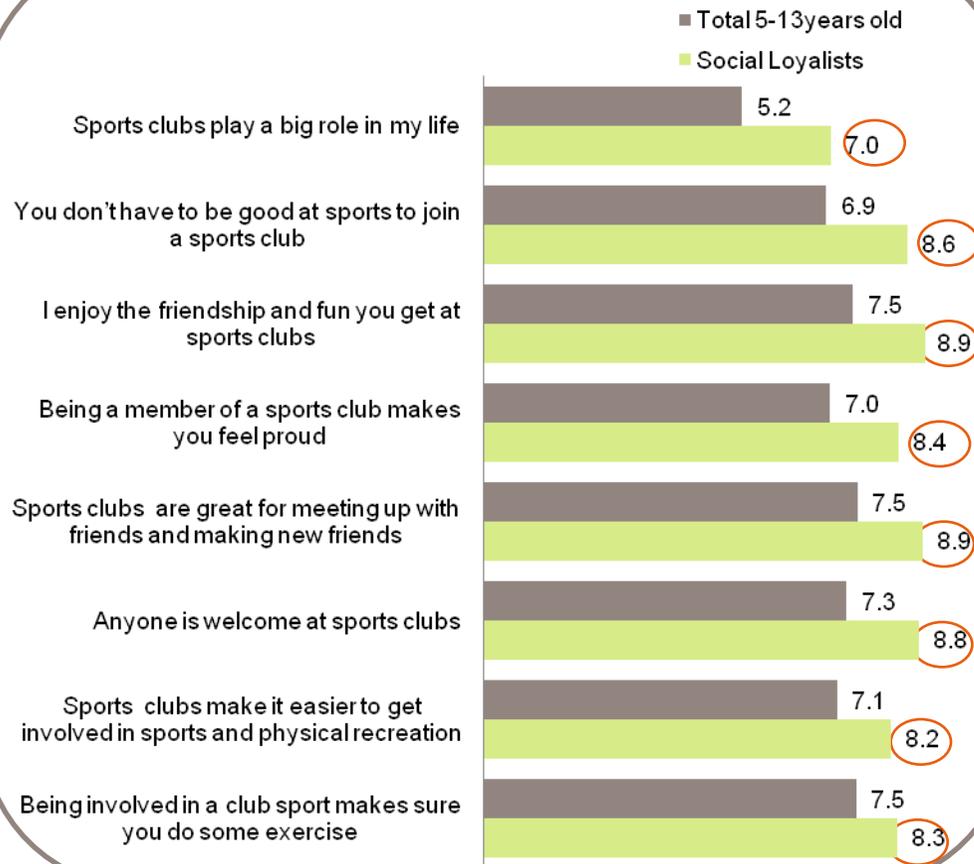
Their relationship with clubs



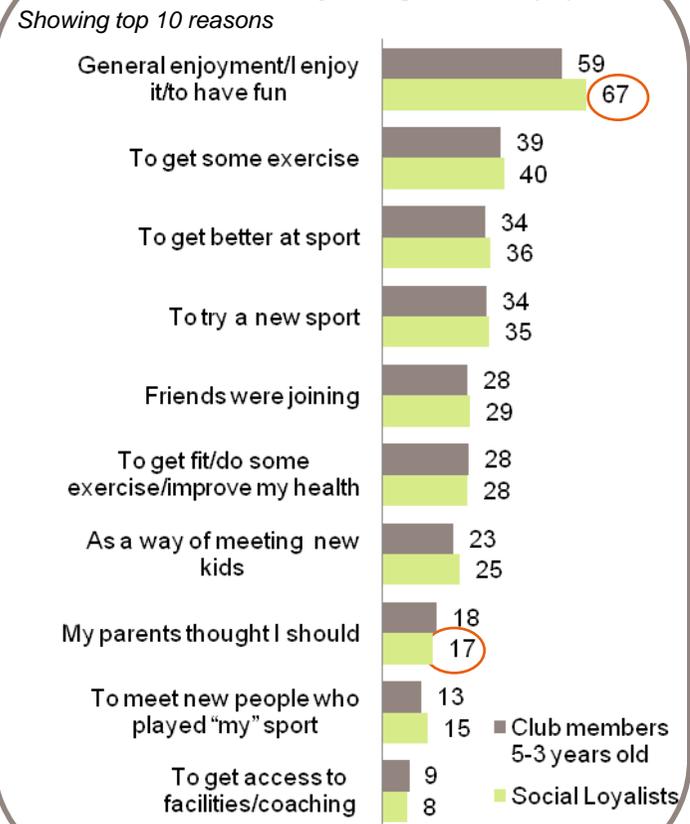
Social Loyalists see clubs to be a big part of their life and identity. They enjoy all aspects of club participation (physical, social, for self improvement) and perceive few barriers to club membership. They are more likely than other club member segments to have joined for fun/enjoyment. Other motivations are to get exercise, to advance their skill in that sport and to try a new sport. The decision to join is typically a joint decision with parents.

100% club members

Defining club attitudes (mean score out of 10)



Main reasons for joining a club (%)



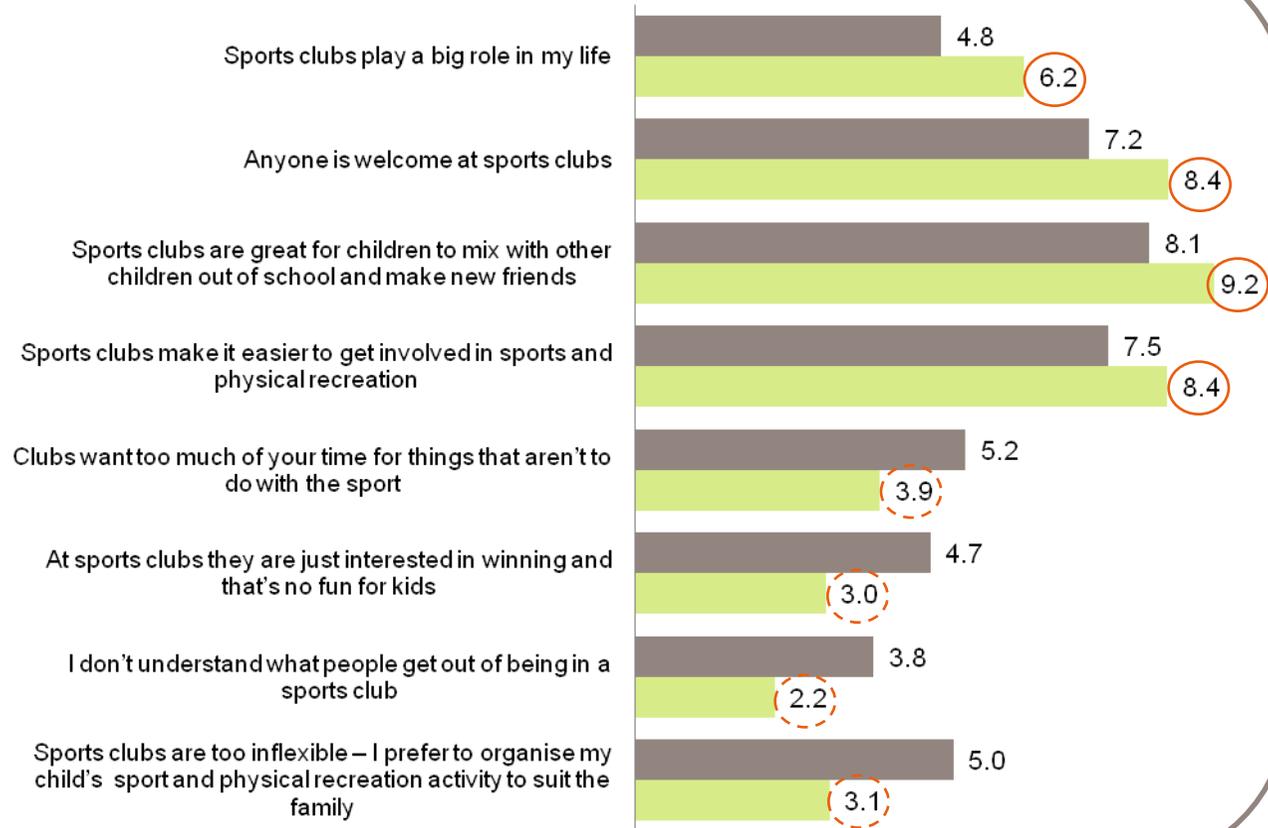
Whose decision to join club?

- Joint decision: 63%
- nett parents decision: 15%
- Only the childs decision: 22%

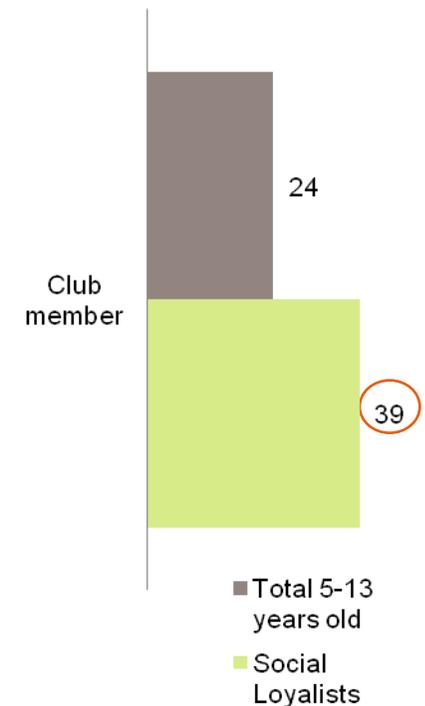


Social Loyalists' positive disposition to clubs is likely to have been shaped by their parents who are also likely to be club members (39% vs. 24% of total children). These parents are more likely to consider clubs to be a part of their life and see clubs to help children be more social. These parents hold few barriers to club membership.

Parents attitudes to clubs (mean score out of 10)



Parents club membership status



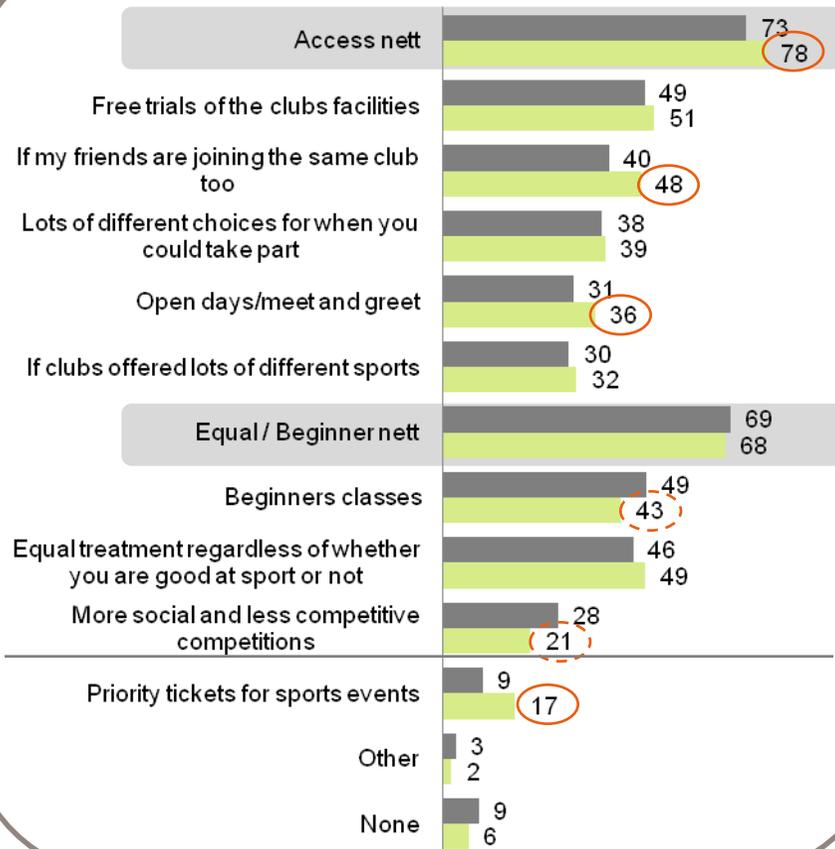
Social Loyalists

How can we help them stay in sports clubs?

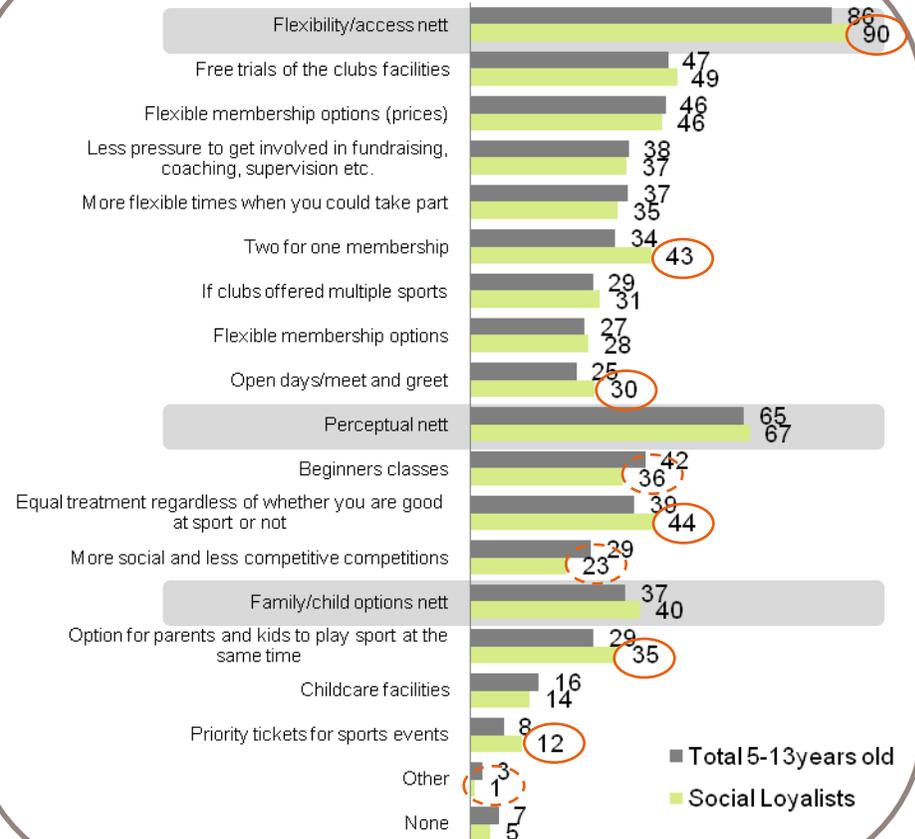
For this segment, its about retention and encouraging further involvement through other sport clubs. Given their appreciation of the social elements, allowing other friends to join and open meet days are also appealing. Although cost is less of a barrier, membership options that make it easier for the whole family to join will benefit the families of this segment.

11% would do more sports if they had more information on how (vs. 28% total)

Potentially encouraged by...(%)



Parents potentially encouraged by...(%)



What to talk to them about? (Products)

*Competitions / matches
(competitive and social)*

Additional sports / challenges

Ability for friends / family to join

*Rewards for membership /
referrals / bring a friend*

*Free trial and open days to attract
to new clubs*

*Membership options that promote
family membership*

What to say? (Message areas)

*Challenge yourself while having
fun with other children*

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

Be part of the team/ club

How to say it? (Tone)

Challenge / Fun

Where

Within clubs

Where to look	Total %	Social Loyalist %
Internet	41	40
Ask friends or family	21	29
Local newspapers	16	15
School	15	9
Preferred means of contact	Total %	Social Loyalist %
School notices/school newsletters	59	66
Email	47	50
Online/websites	43	47
Flyers in post-box	39	40
Newspapers	29	30
Sign on days at sports grounds	18	27
Community notice boards	19	22
Local fairs and fates	14	17
Demonstrations	8	10
Radio/TV advertising	6	8
Mobile (SMS/MMS)	5	6

Sport Driven





Pen Portrait

The Sport Driven make up over 1 in 10 Australians aged 5-13 years old. They are more than likely to be found in metropolitan Australia and are over-represented by CALD individuals (1 in 5 are CALD).

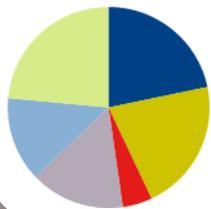
The Sport Driven are highly engaged with sport and show a relatively high interest in doing more sport if they had information on how to go about it. While they aren't adverse to competition for them, it's more about the sense of achievement through meeting personal goals and self improvement. Sport (in and out of the club) provides a strong sense of identity and means of self achievement for the Sport Driven. While they appreciate the camaraderie and the opportunity to get together with friends that clubs offer, it is the sport and self improvement rather than the social aspects of clubs that are paramount. Their membership with clubs is typically supported by their parents where 3 in 10 are club members themselves.

Clubs should focus on retaining these individuals through offers that allow them to achieve their personal fitness goals through sport in an inclusive environment. Products and services should promote equal treatment and opportunities to participate in a variety of sport at all levels. Ensure flexible membership pricing and family membership options while reducing the pressures to be involved in the club 'beyond' playing the sport' to encourage continued membership of this segment and their parents.



The Sport Driven make up over 1 in 10 Australians aged 5-13 years old. They are more likely to be male (3 in 5 are male) over-represented by CALD individuals (1 in 5 are CALD).

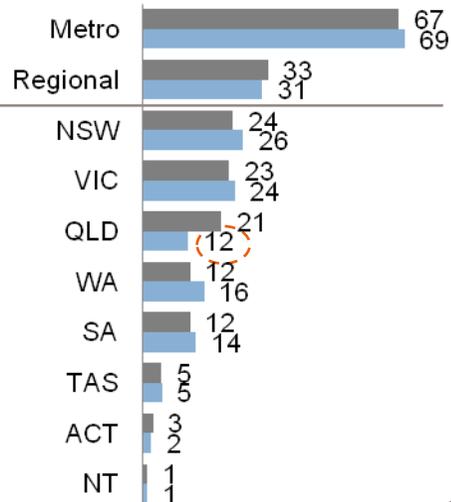
337,001 Australians aged 5-13 years old



14% of Australian children aged 5-13 years old



Resides (%)



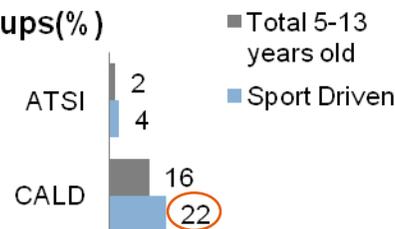
Gender (%)



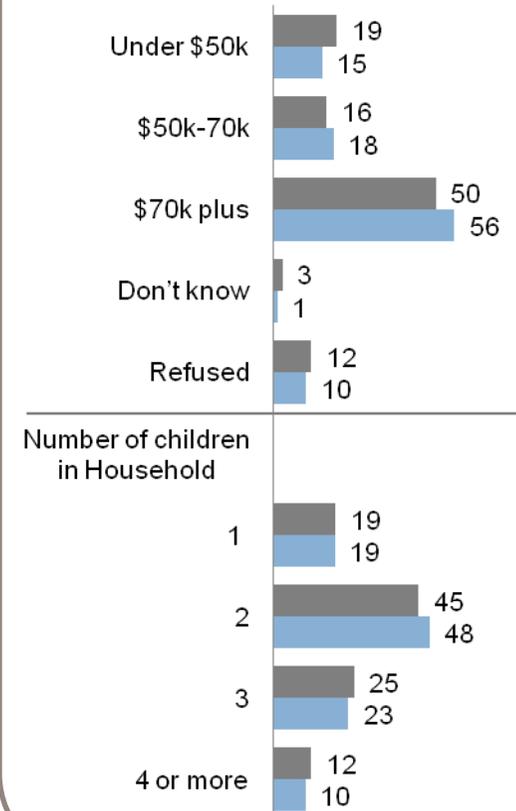
Age (%)



Special Groups (%)



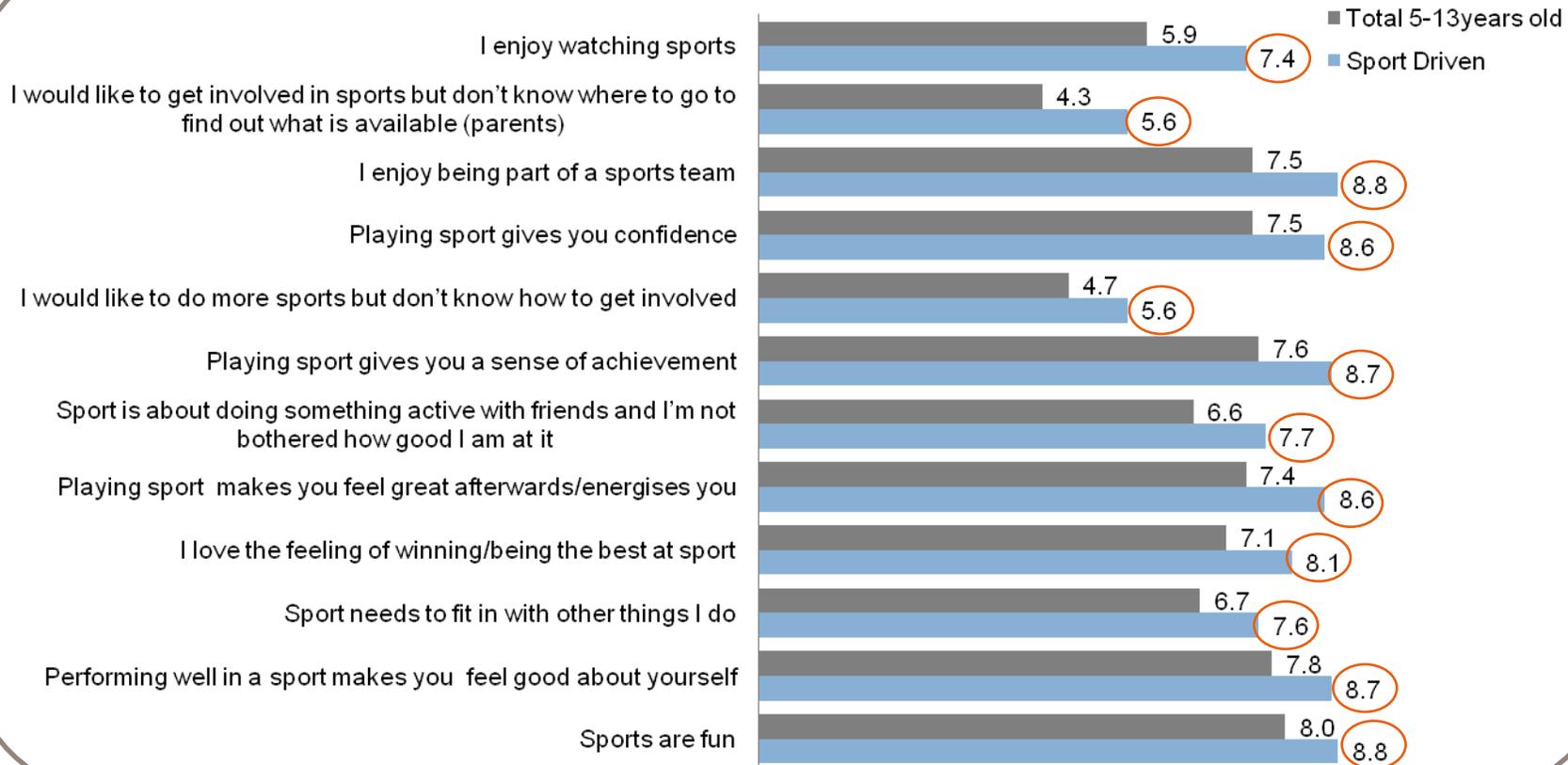
Parents profile (%)





The Sport Driven are highly engaged with sport and enjoy as aspects, in particular, self achievement through sport. While they aren't adverse to competition for them, it 's more about the sense of achievement through meeting personal goals. They are highly motivated by the health benefits of physical recreation. There is some evidence that they do have competitive interests that sport will need to fit in with.

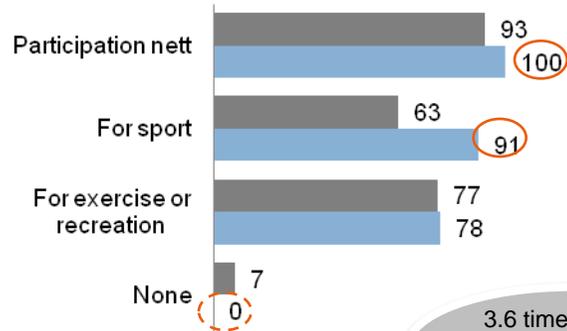
Defining sports attitudes (mean score out of 10)





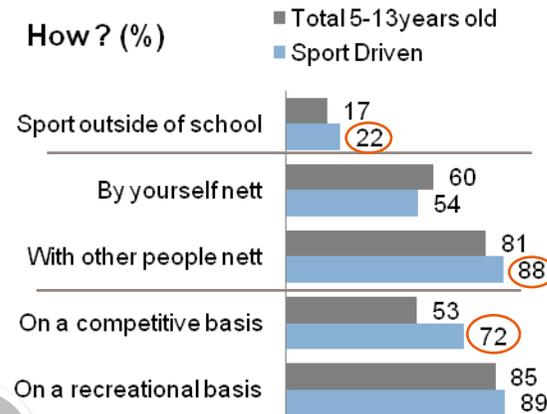
The Sport Driven are highly active and do organised physical activity within clubs but also through recreational clubs, school and courses. Their participation is for competitive as well as recreational purposes.

Physical activity (%)

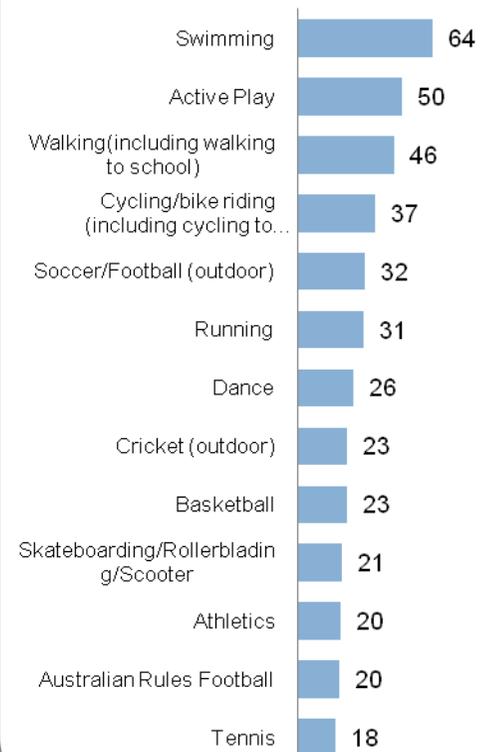


3.6 times a week
(vs.3.8 for total)
(exc. walking to school)

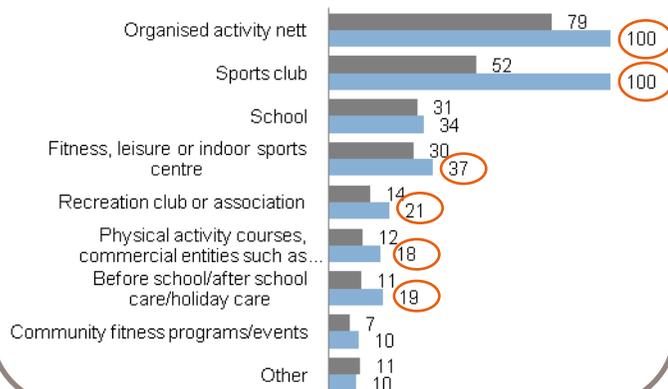
How? (%)



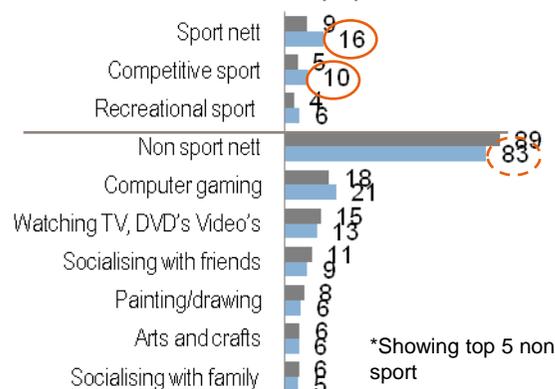
What they do (%)



Organised? (%)



Main interests/hobbies(%)



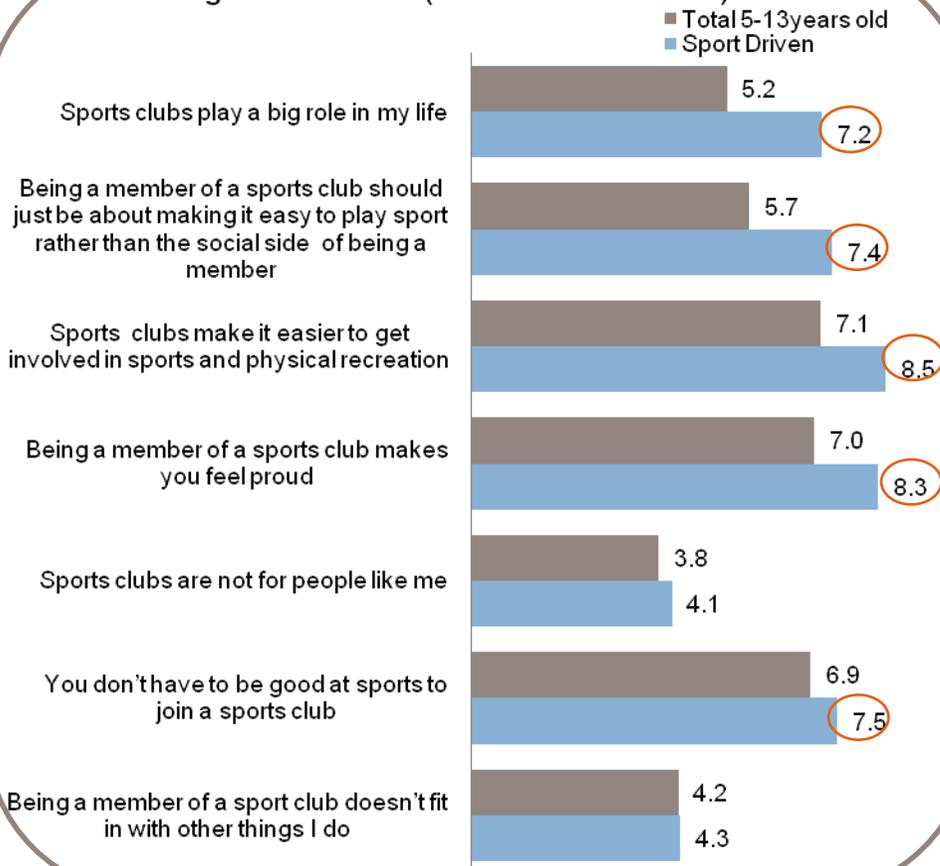
*Showing top 5 non sport



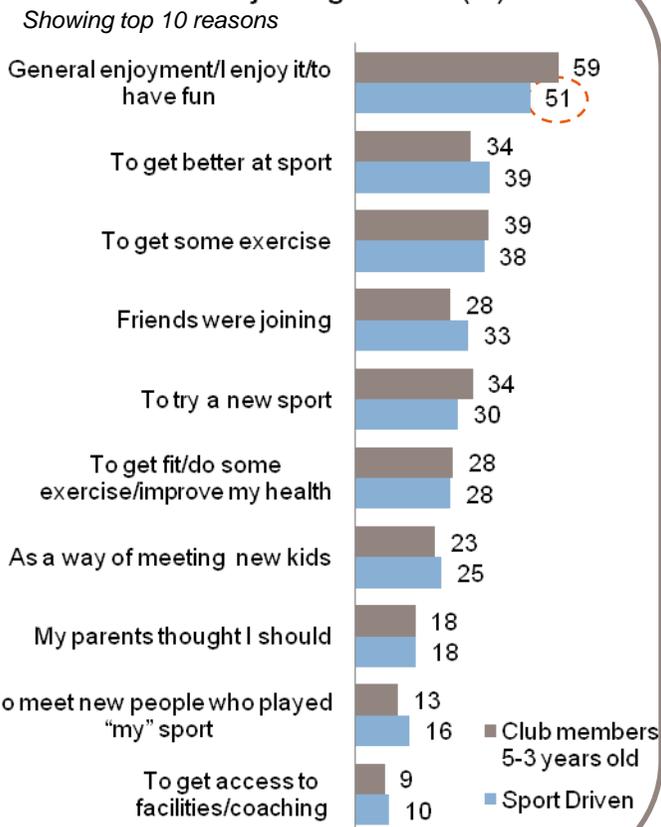
Club sport provides a strong sense of identity and means of self achievement for the Sport Driven. While they enjoy the social aspect of club membership, for this segment the focus is on sport participation and self improvement. Most decisions to join the club are made jointly with parents.

100% club members

Defining club attitudes (mean score out of 10)



Main reasons for joining a club (%)



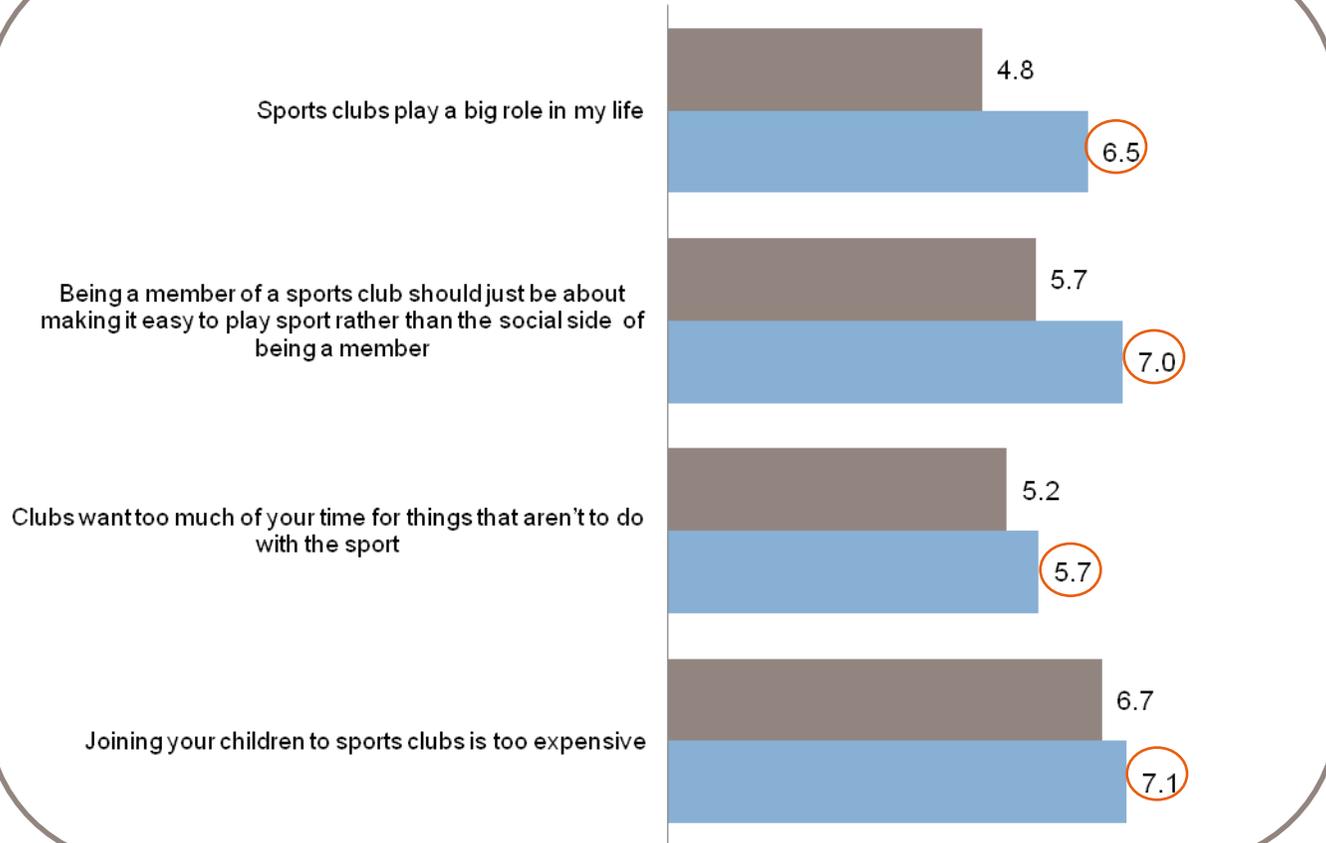
Whose decision to join club? (%)

Joint decision nett	63
Only parents decision nett	16
Only the childs decision nett	21

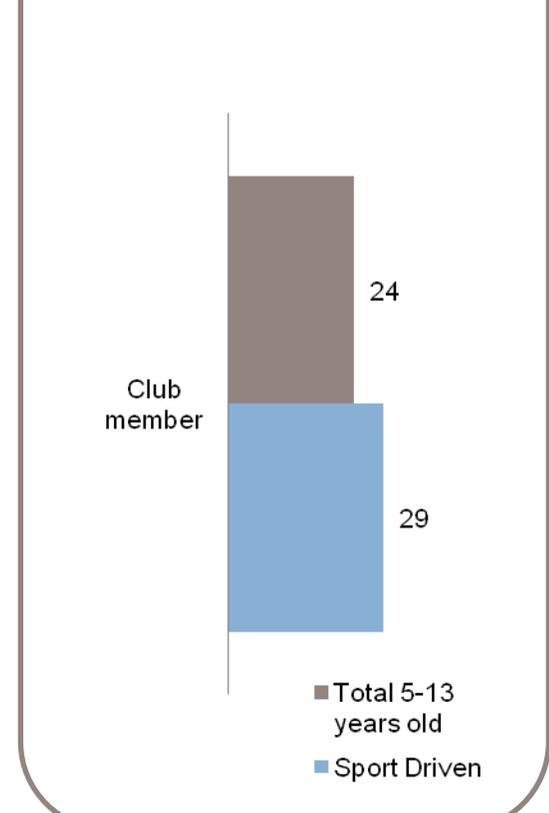


Parents of the Sport Driven are also likely to have positive views of clubs, not surprising given a relatively higher level of club membership themselves (3 in 10). Like their children, they can feel that clubs can put too much emphasis on the social side of being a member as well as expecting time for things beyond just the sport.

Parents attitudes to clubs (mean score out of 10)

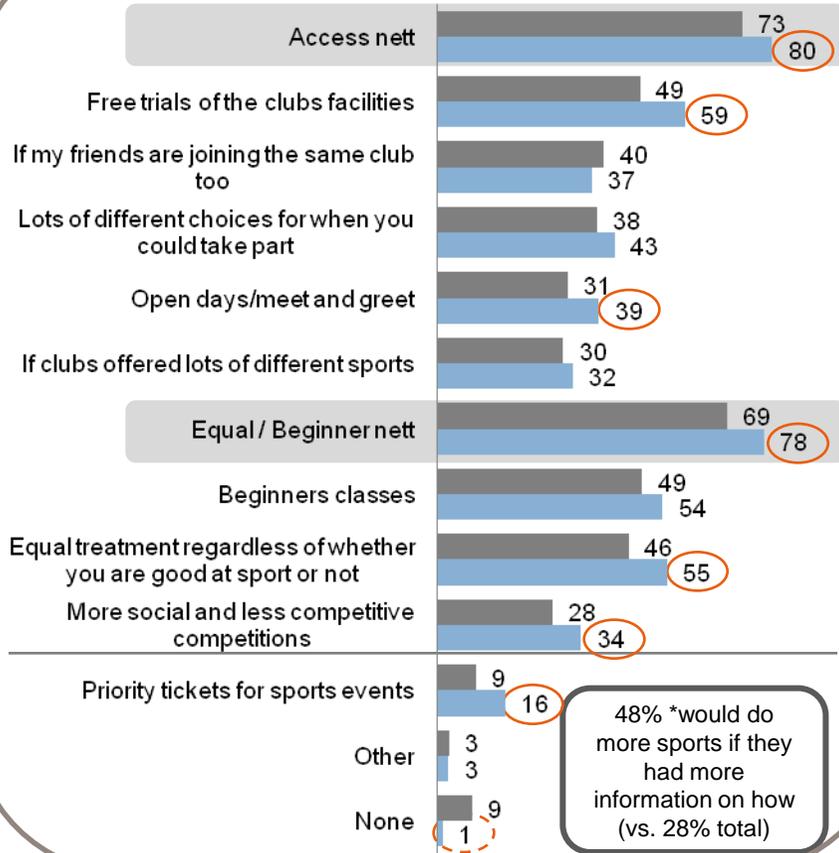


Parents club membership status

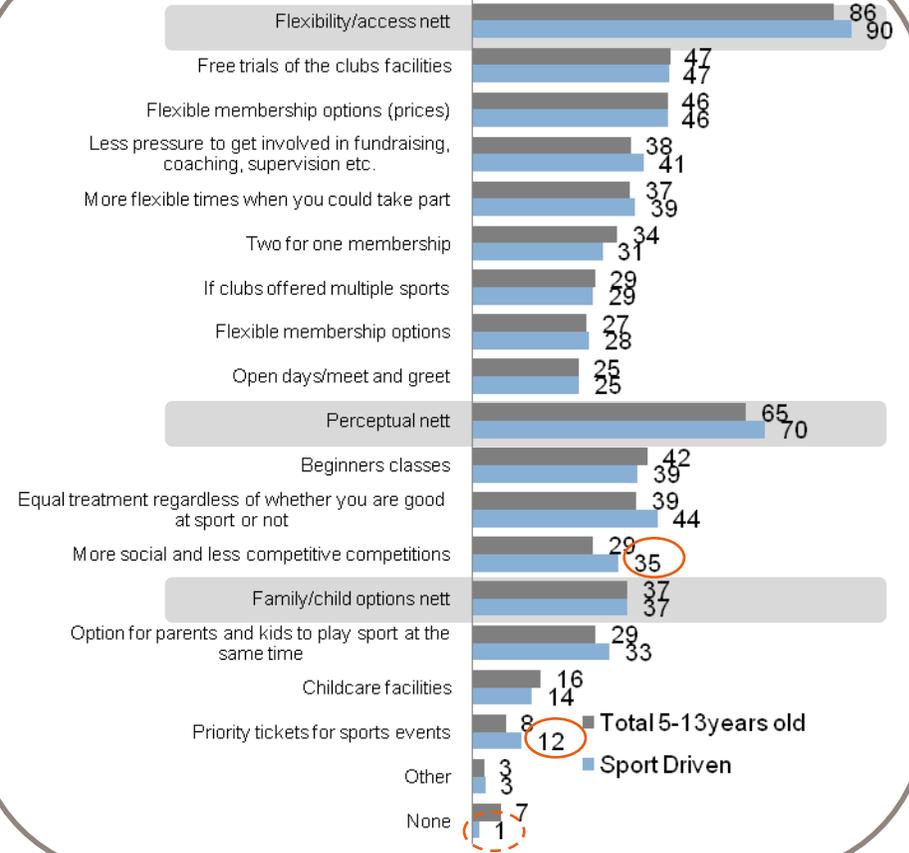


Although this segment enjoy the competitive element, they also need clubs to provide an environment of equality and flexibility. They are most interested in beginners classes and equal treatment as well as opportunities to trial new clubs, flexibility in participation in terms of times to participate. Parents of this segment are needing membership and trial opportunities that make it easy to be members (flexible membership options, free trials, flexible times, equal treatment and less competitive options for participation).

Potentially encouraged by...(%)



Parents potentially encouraged by...(%)



What to talk to them about? (Products)

Products and services that are inclusive promoting equal treatment

Beginner classes / levels

Multiple / alternative sport options

Friend and family membership

Parent and child sport participation opportunities

What to say? (Message areas)

It's all about the 'sport'

Clubs can help you achieve your personal fitness / sports goals (rather than competitive focus)

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	41	34
Ask friends or family	21	23
Local newspapers	16	20
School	15	13

Preferred means of contact	Total %	Sport Driven %
Email	47	62
School notices/school newsletters	59	55
Online/websites	43	42
Flyers in post-box	39	35
Newspapers	29	34
Sign on days at sports grounds	18	24
Community notice boards	19	24
Local fairs and fates	14	15
Mobile (SMS/MMS)	5	11
Mobile phone call	5	11

Apathetic Clubber





Pen Portrait

Apathetic Clubbers make up 1 in 6 Australians aged 5-13 years old. They are slightly more likely to be from higher income households (over \$70k per annum).

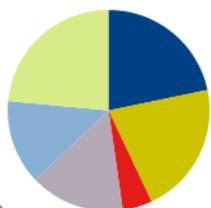
Despite their relatively active participation in sport (recreational and competitive), only a small minority consider sport to be a main hobby or interest, reflecting their apathetic attitudes to sport. This segment exhibits some negative perceptions of sport suggesting poor experiences with sport over time. They are less likely to see the benefits to sport participation compared to other children and more likely to feel they don't like sport or that it is too competitive and no longer fun. They have joined clubs in the past for general enjoyment or fun or to try a new sport rather than for sport skill advancement. However it appears that pressures of the club may be eroding their positive attitudes to sport and clubs in general.

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 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.



Apathetic Clubbers make up 1 in 6 Australians aged 5-13 years old. While they look largely like the general children's population they are slightly more likely to be from higher income households (over \$70k per annum).

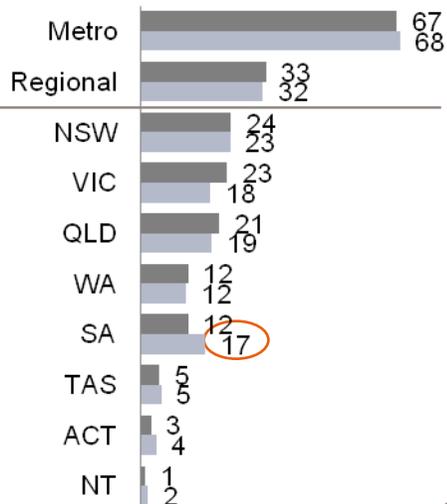
374,996 Australians aged 5-13 years old



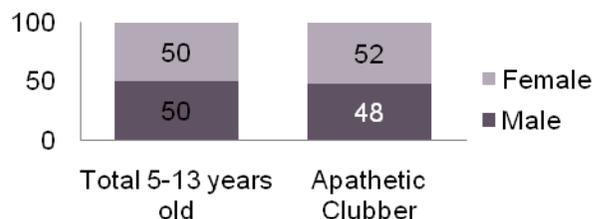
15% of Australian children aged 5-13 years old



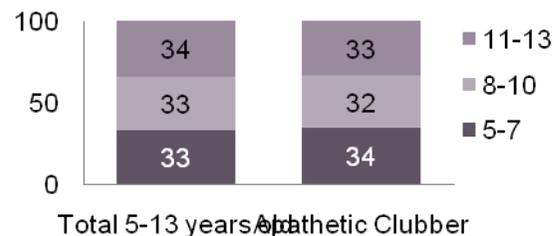
Resides (%)



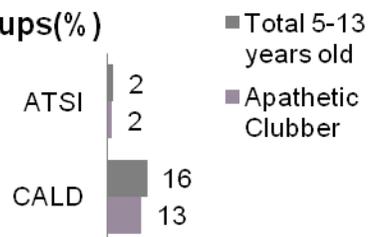
Gender (%)



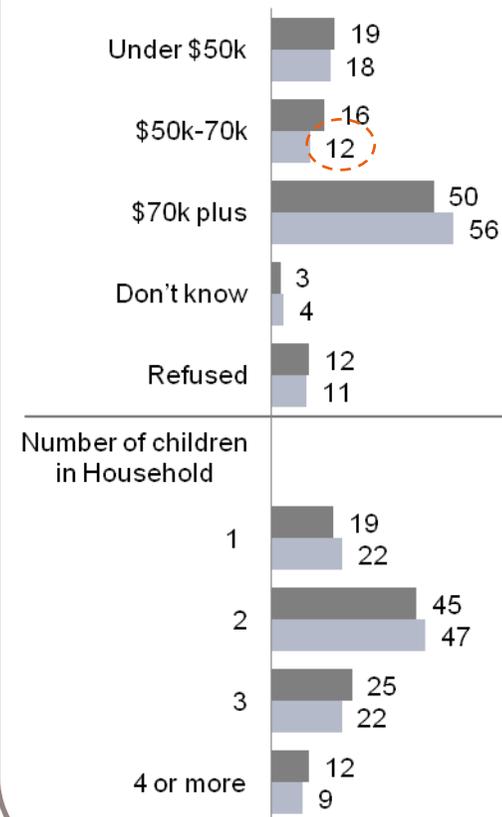
Age (%)



Special Groups (%)



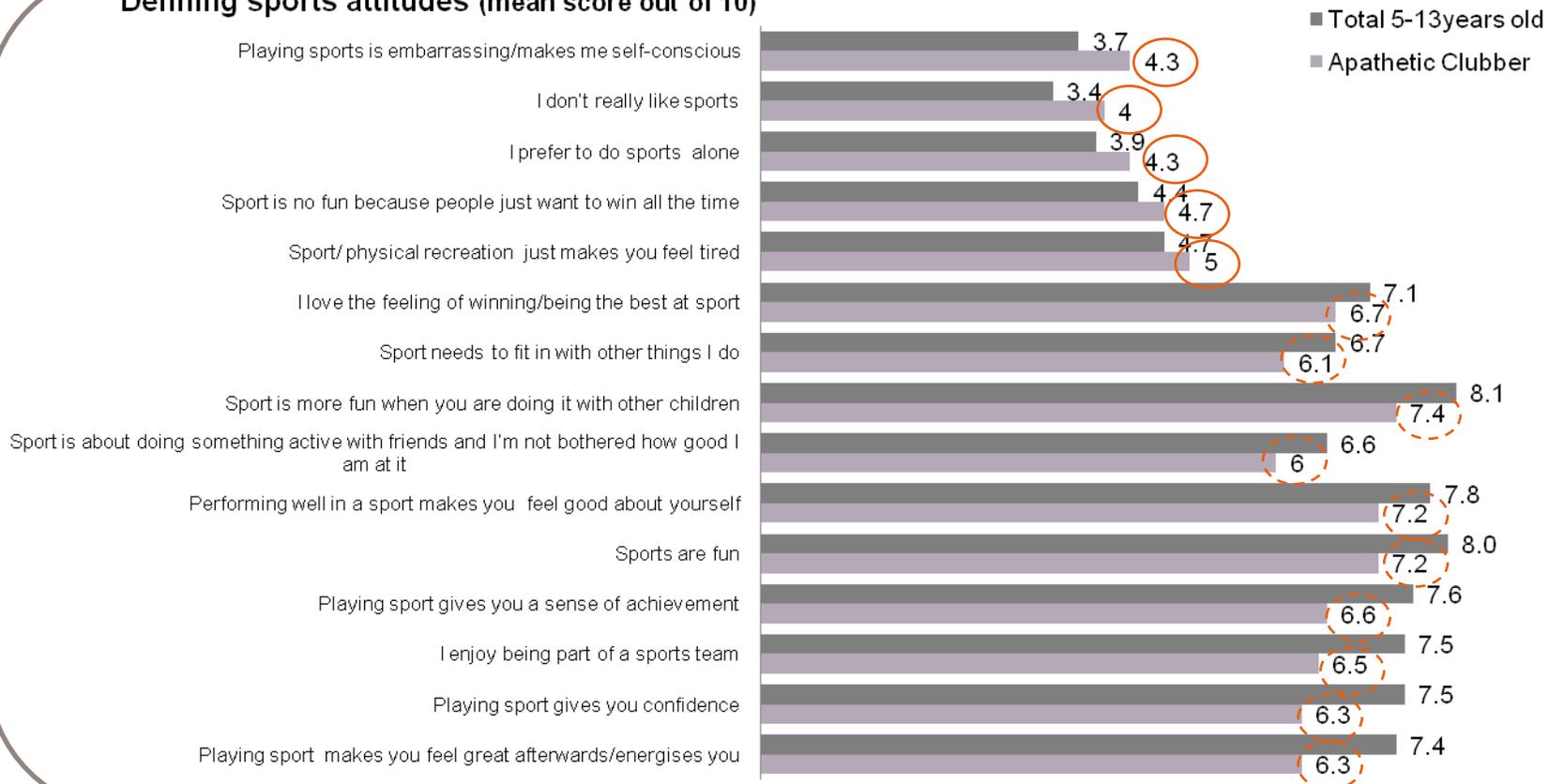
Parents profile (%)





Despite their participation in club sport, this segment exhibits some negative perceptions of sport suggesting poor experiences with sport over time. They are less likely to see the benefits to sport participation compared to other children and more likely to feel they don't like sport or that it is too competitive and no longer fun.

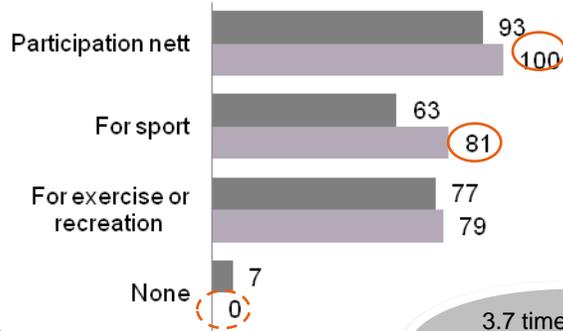
Defining sports attitudes (mean score out of 10)





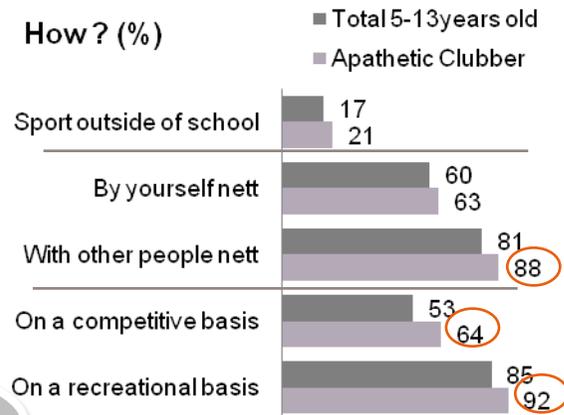
This segment are relatively active with the majority who consider their participation in physical activity as being both for sport and recreation or for exercise. However, only a small minority consider sport to be a main hobby or interest.

Physical activity (%)

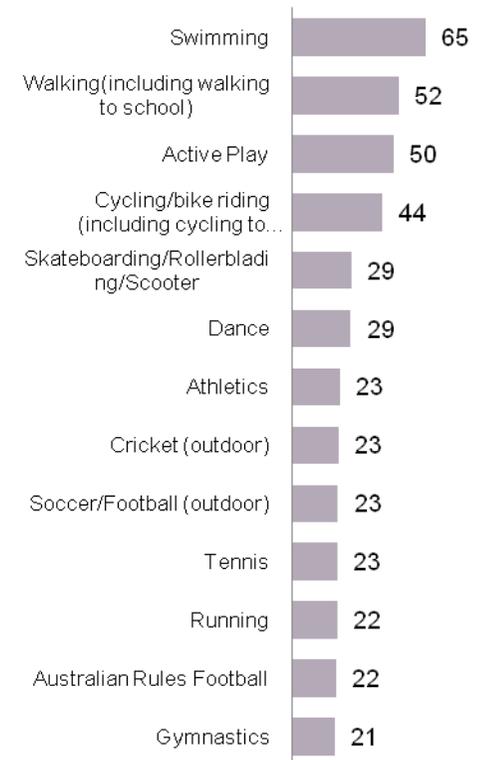


3.7 times a week (vs.3.8 for total) (exc. walking to school)

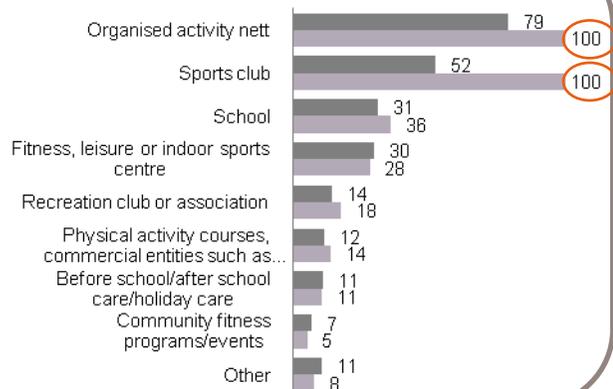
How? (%)



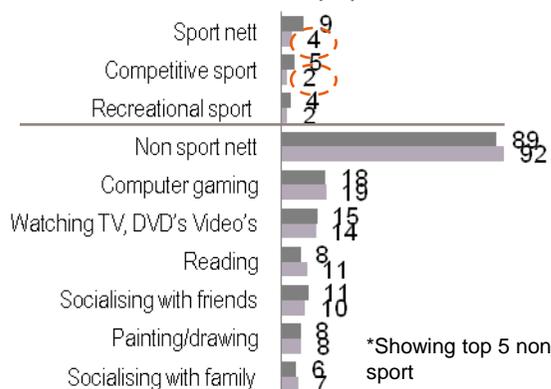
What they do (%)



Organised? (%)



Main interests/hobbies (%)

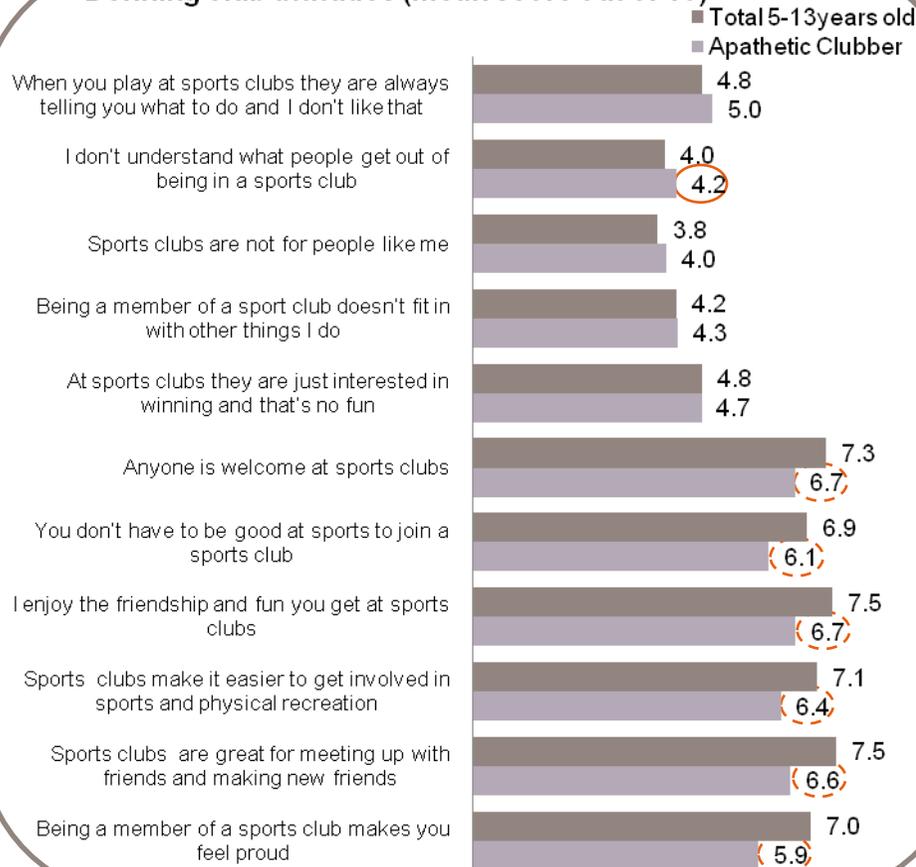




The Apathetic Clubber have joined clubs in the past for general enjoyment or fun or to try a new sport rather than for sport skill advancement. Around 1 in 5 had the decision made by their parents. It appears that pressures of the club may be eroding their positive attitudes to sport and clubs in general.

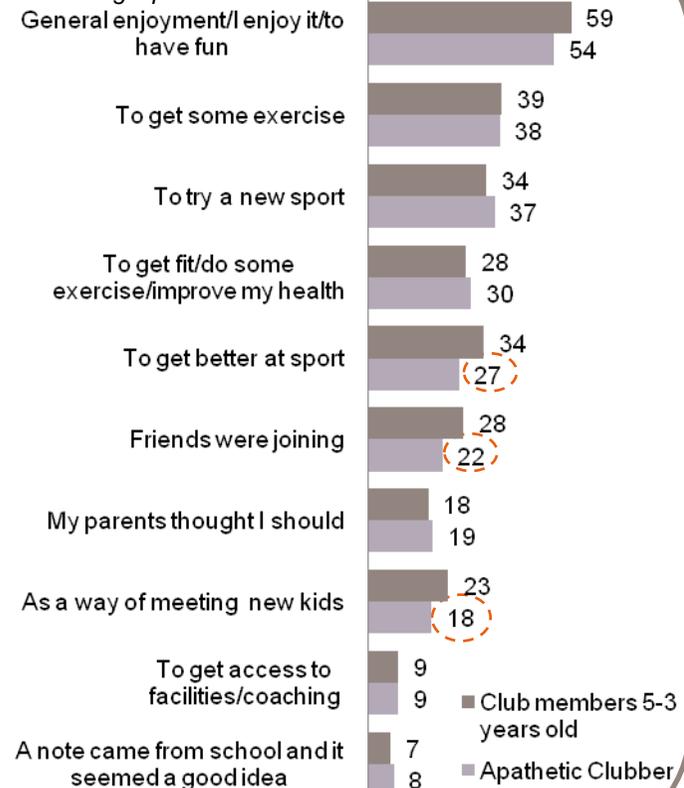
100% club members

Defining club attitudes (mean score out of 10)

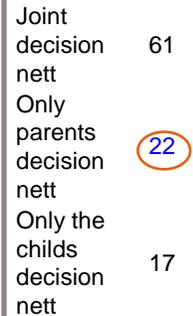


Main reasons for joining a club (%)

Showing top 10 reasons



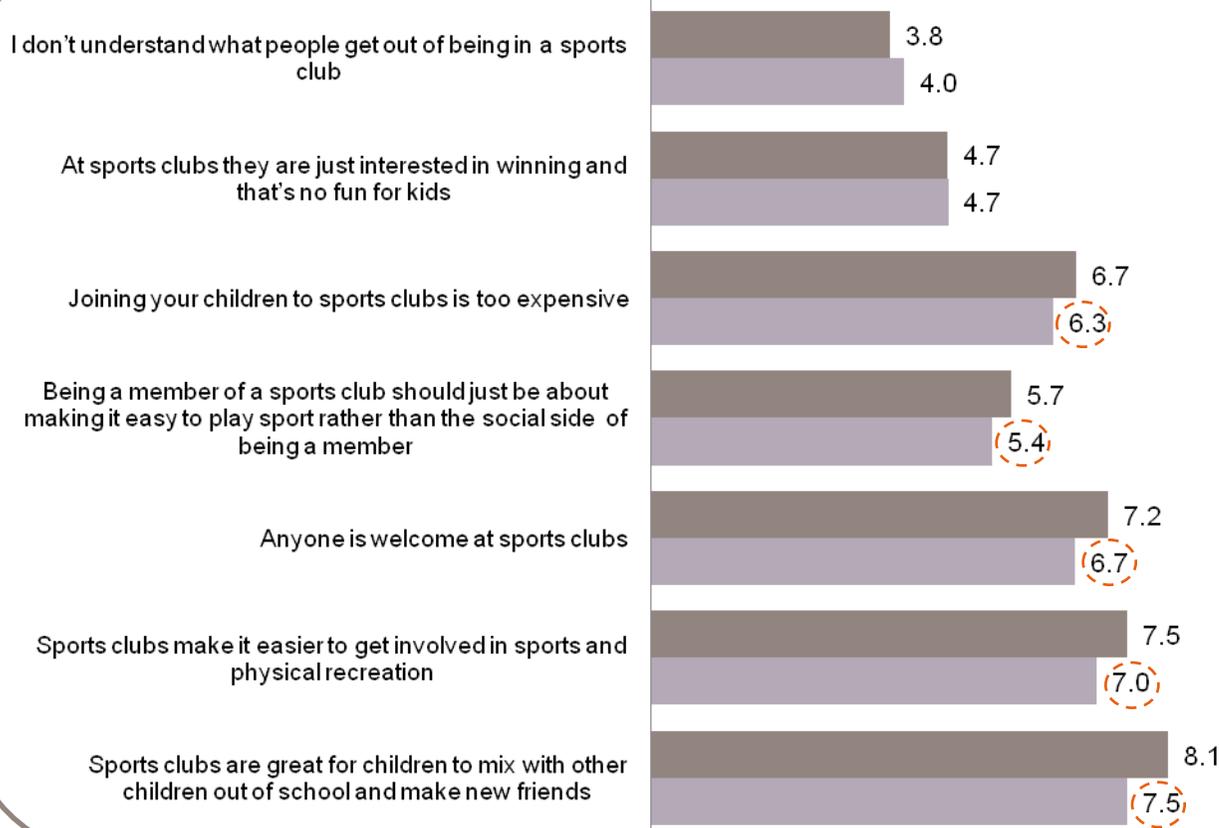
Whose decision to join club? (%)



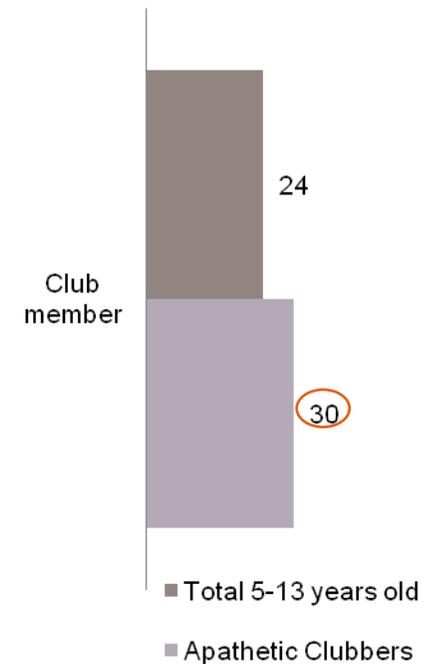


3 in 10 parents of Apathetic Clubbers are club members. They are less likely to see costs of participating in club-based sport as a barrier compared to parents of other segments.

Parents attitudes to clubs (mean score out of 10)



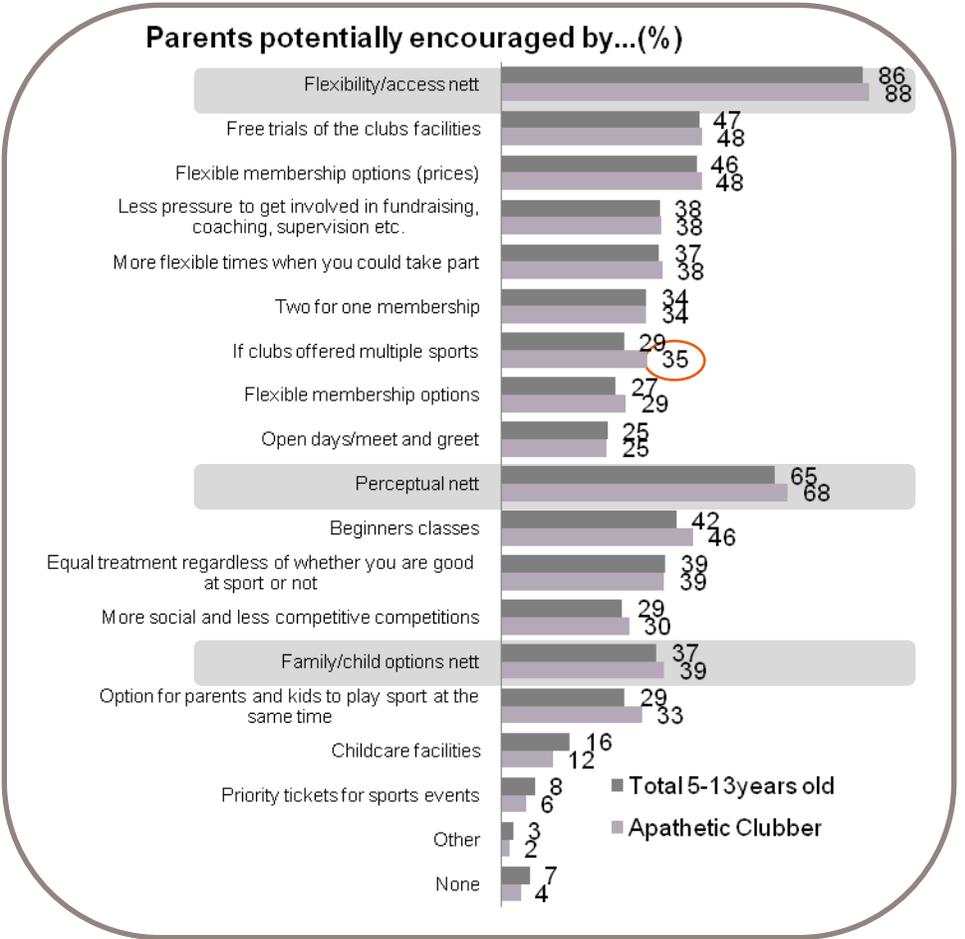
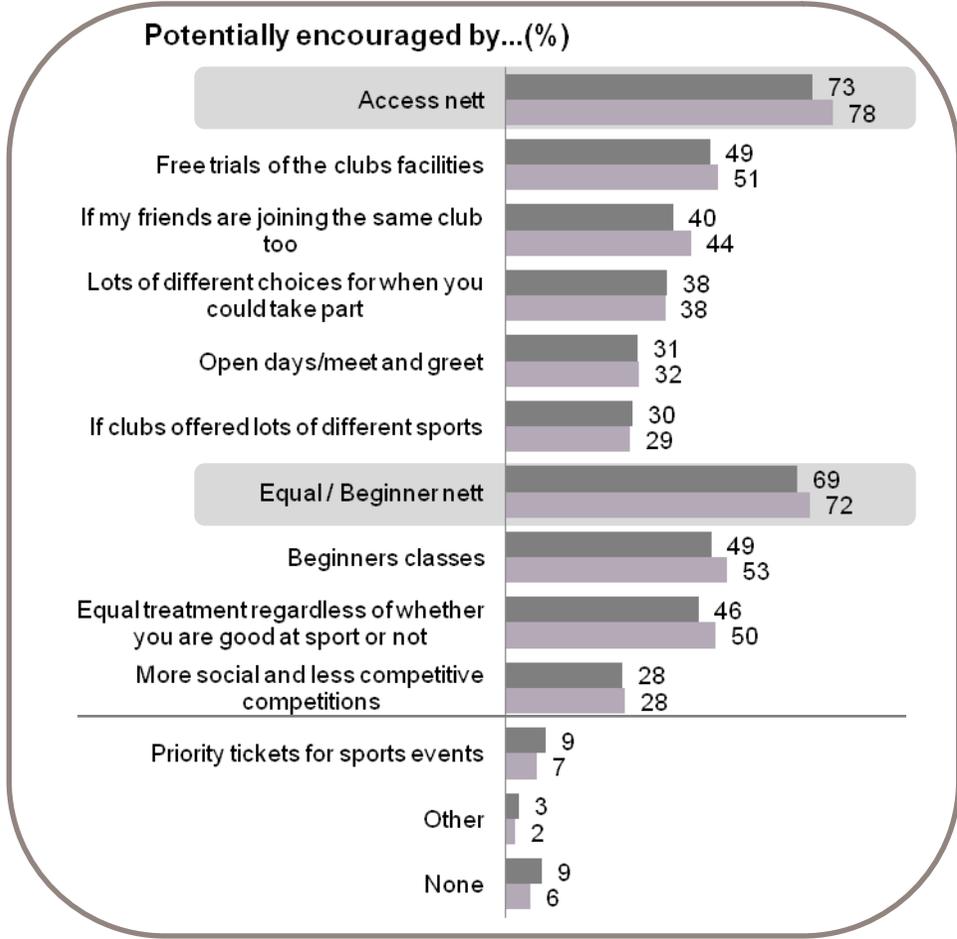
Parents club membership status





Apathetic Clubbers are most interested in options where they can trial facilities for free or join with friends as well as those options that promote equality for all such as beginner classes or equal treatment and access. Parents of this segment area also interested in flexible membership options in terms of pricing.

22% would do more sports if they had more information on how (vs. 28% total)



What to talk to them about? (Products)

Products that focus on fun and social participation

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 whether you're good at the sport or not, 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	37	39
Ask friends or family	21	28
Local newspapers	16	17
School	17	13

Preferred means of contact	Total %	Apathetic Clubber %
School notices/school newsletters	59	60
Online/websites	43	48
Email	47	48
Flyers in post-box	39	43
Newspapers	29	31
Sign on days at sports grounds	18	16
Local fairs and fates	14	15
Community notice boards	19	14
Demonstrations	8	8
Radio/TV advertising	6	7



**SEGMENTS OF NON MEMBERS WITH
HIGH POTENTIAL FOR ACQUISITION**

Thrifty Enthusiasts





Pen Portrait

The Thrifty Enthusiasts make up around 1 in 20 Australians aged 5-13 years old and are the smallest of the non club member segments. They are very positive about physical activity and sport in terms of the physical, mental, social and self improvement benefits and don't personally have any barriers to sport participation. Although they don't do physical activity with a club, most do organised physical activity through other organisations, school or courses. They are also doing it frequently – 5 times on average a week. Similarly, parents of the Thrifty Enthusiasts are also very positive towards clubs despite only 1 in 10 who are currently members.

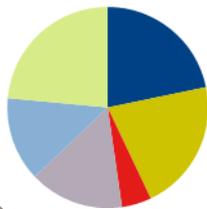
This segment has high acquisition potential with 8 in 10 who are interested in future club membership. Most (8 in 10) have been members in the past. There are few perceptual barriers to joining a club, however cost of participating in club-based sport is a barrier.

To appeal to this segment, clubs should consider products that center on making club-based sport more accessible in terms flexible membership pricing options, two for one membership and providing value for money in terms of multiple sports. More flexibility in participation times are also appealing for parents. Children in this segments as well as their parents also need to feel that clubs are inclusive and promote equality regardless of skill level.



The Thrifty Enthusiasts make up around 1 in every 20 Australians aged 5-13 years old. They typically represent the general population of this age group although there is a slight overrepresentation in metropolitan areas.

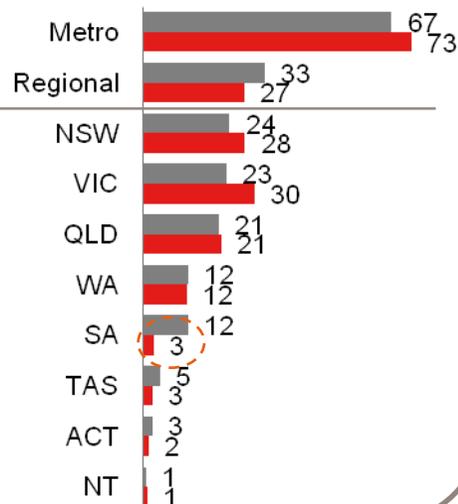
117,490 Australians aged 5-13 years old



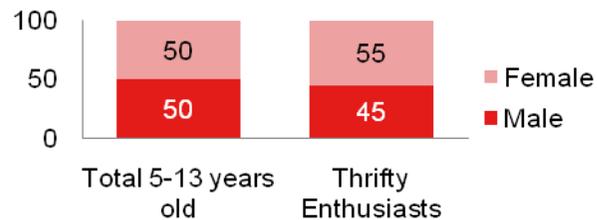
5% of Australian children aged 5-13 years old



Resides (%)



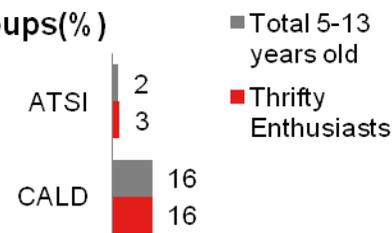
Gender (%)



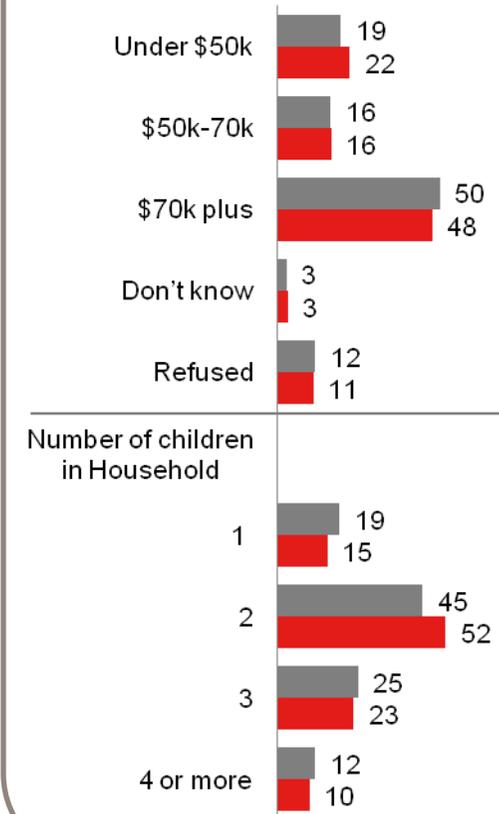
Age (%)



Special Groups (%)



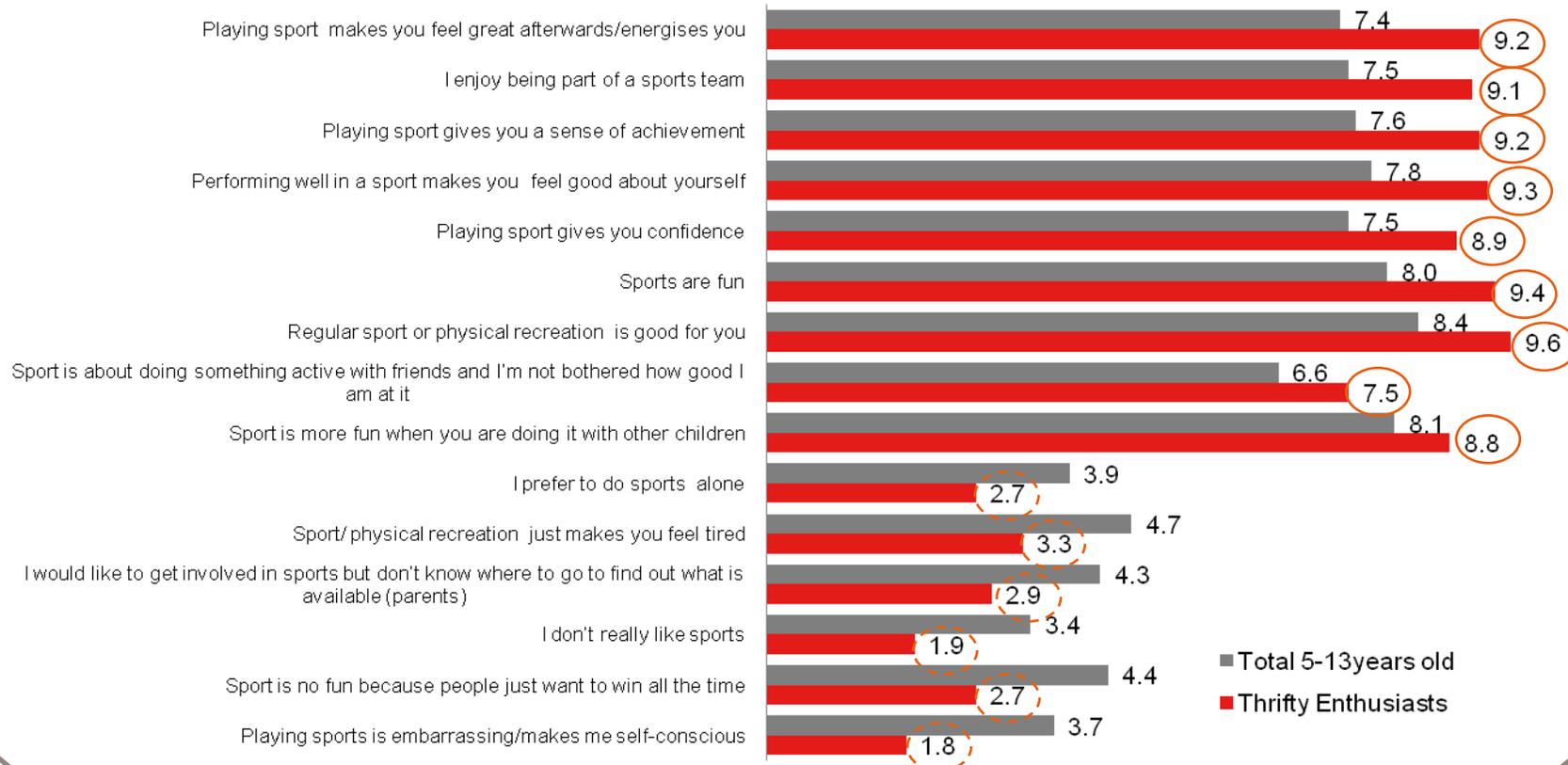
Parents profile (%)





Thrifty Enthusiasts are very positive about physical activity and sport in terms of the physical, mental, social and self improvement benefits. They don't really see any barriers to sport participation.

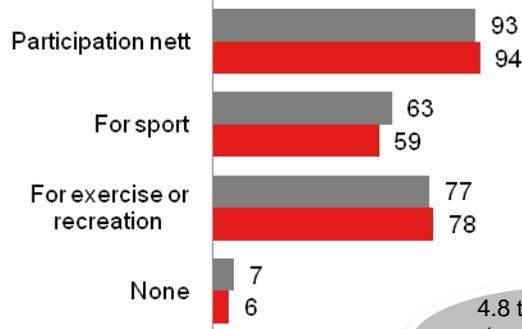
Defining sports attitudes (mean score out of 10)





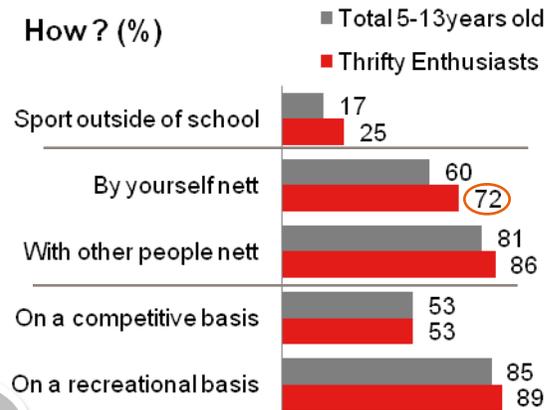
This segment is active and participate in physical activity and sport very frequently (5 times a week). The majority (8 in 10) do organised physical activity. Although they don't do physical activity with a club, most do organised physical activity through other organisations, school or courses.

Physical activity (%)

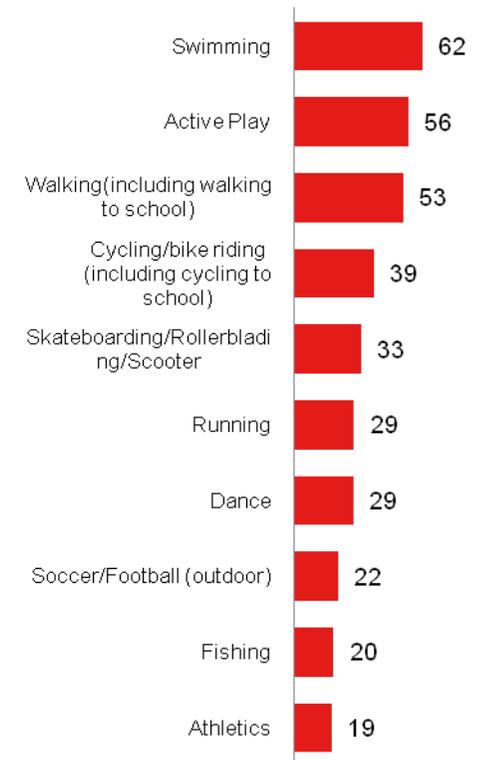


4.8 times a week
(vs.3.8 for total)
(exc. walking to school)

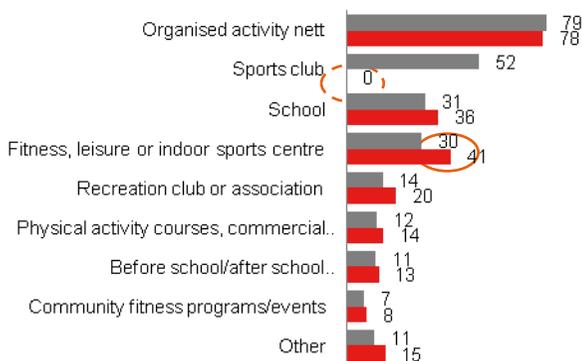
How? (%)



What they do (%)



Organised? (%)



Main interests/ hobbies (%)

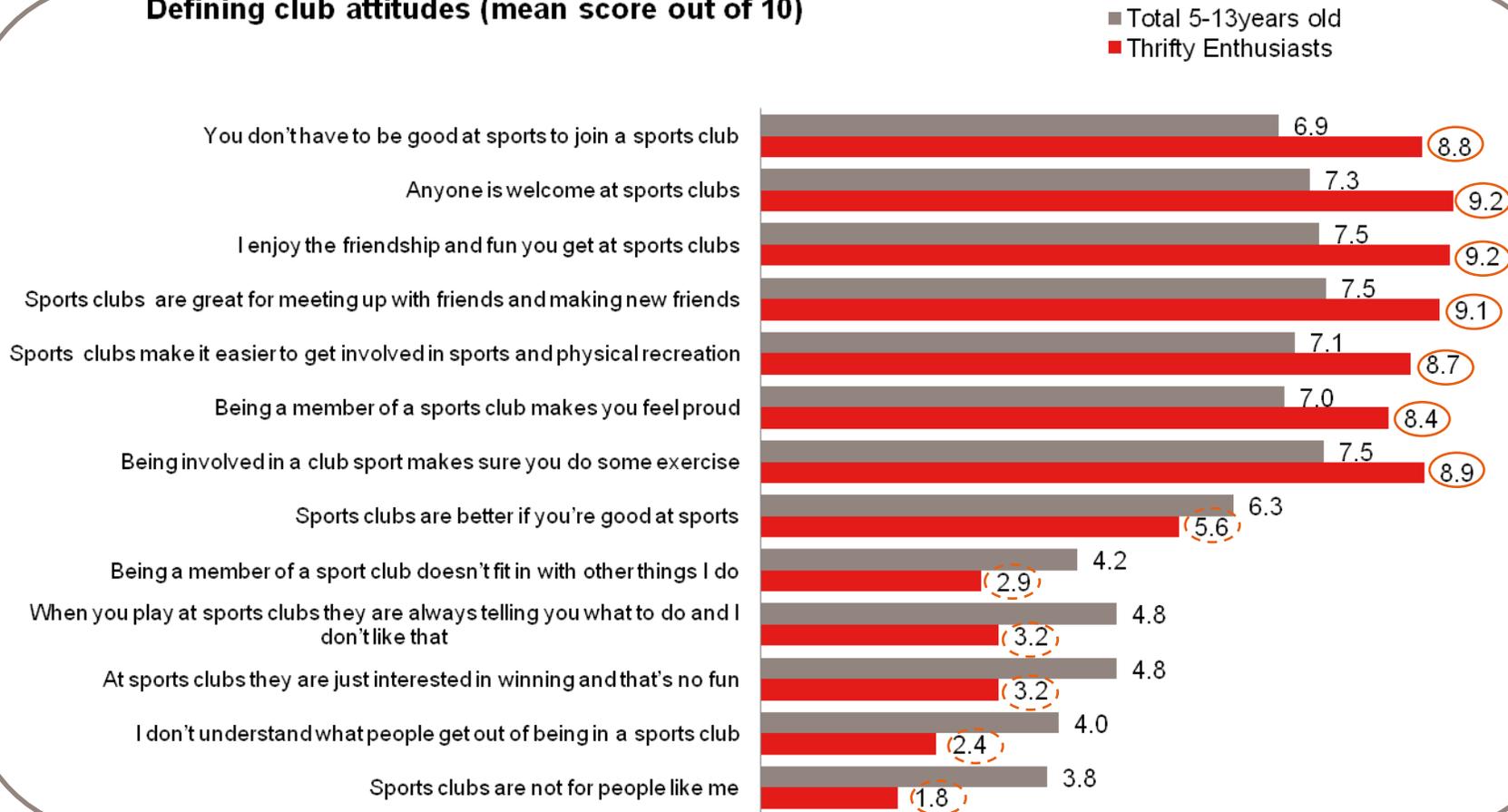


*Showing top 5 non sport



Thrifty Enthusiasts have very positive attitudes towards clubs in terms of clubs providing a sense of identity and pride, being welcoming regardless of skill level and facilitating physical exercise and sport involvement as well as social aspects of friendship and fun. They don't appear to have any perceptual barriers to joining a club.

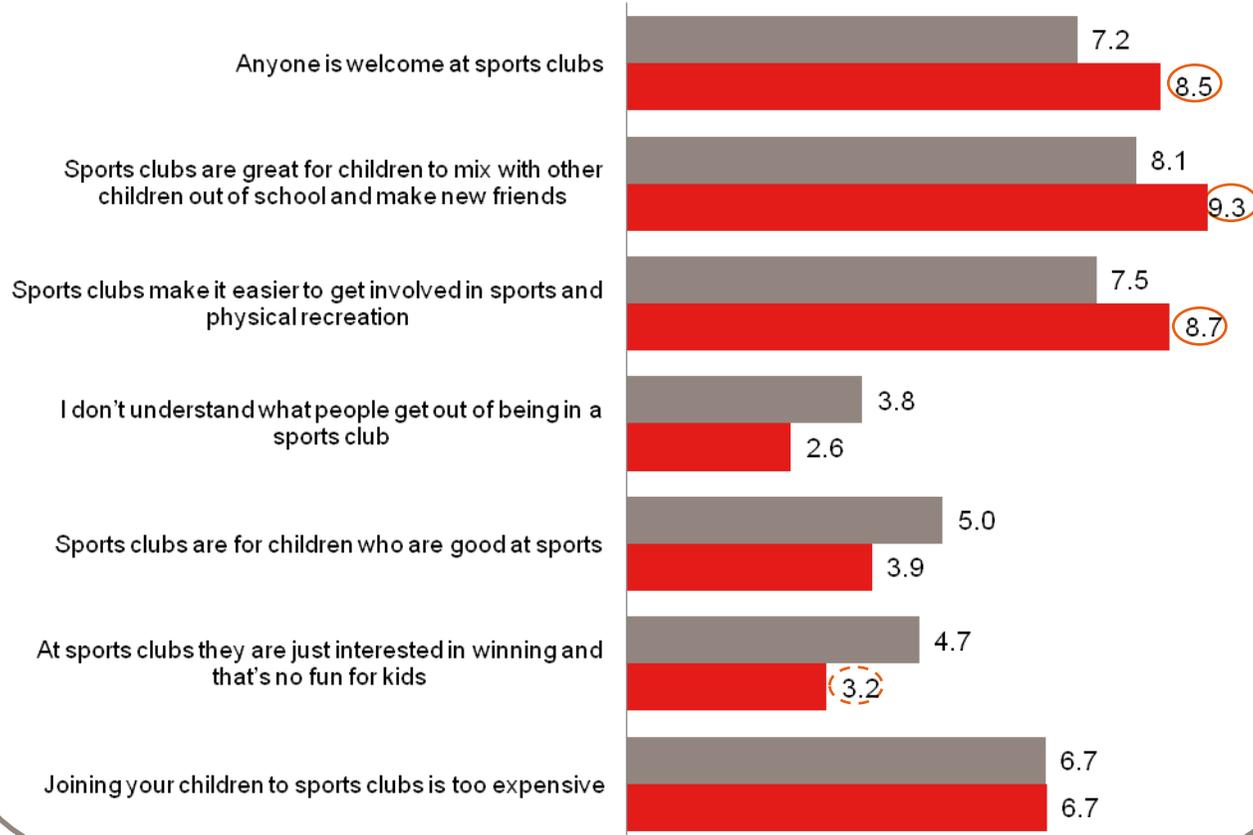
Defining club attitudes (mean score out of 10)



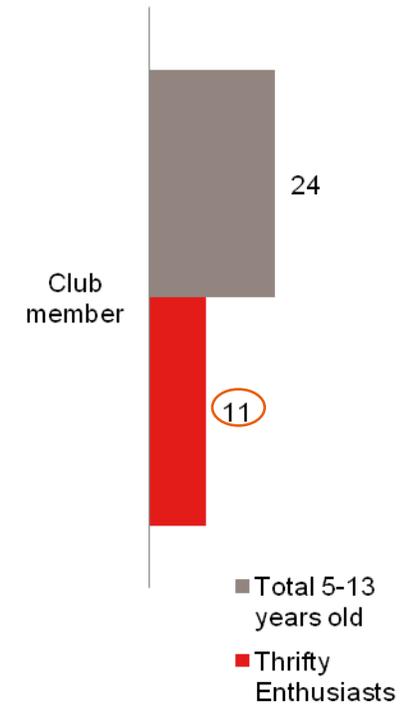


Similarly, parents of the Thrifty Enthusiasts are also very positive towards clubs despite only 1 in 10 who are currently members. That said, costs of participating in club-based sport can be a barrier for parents.

Parents attitudes to clubs (mean score out of 10)



Parents club membership status



Thrifty Enthusiasts have high acquisition potential with 8 in 10 who are interested in future club membership. Most (8 in 10) have been members in the past. However, cost of participating in club-based sport is the main barrier to current membership and is the most important reasons for lapsing membership among this segment.

Interest in doing more sports?

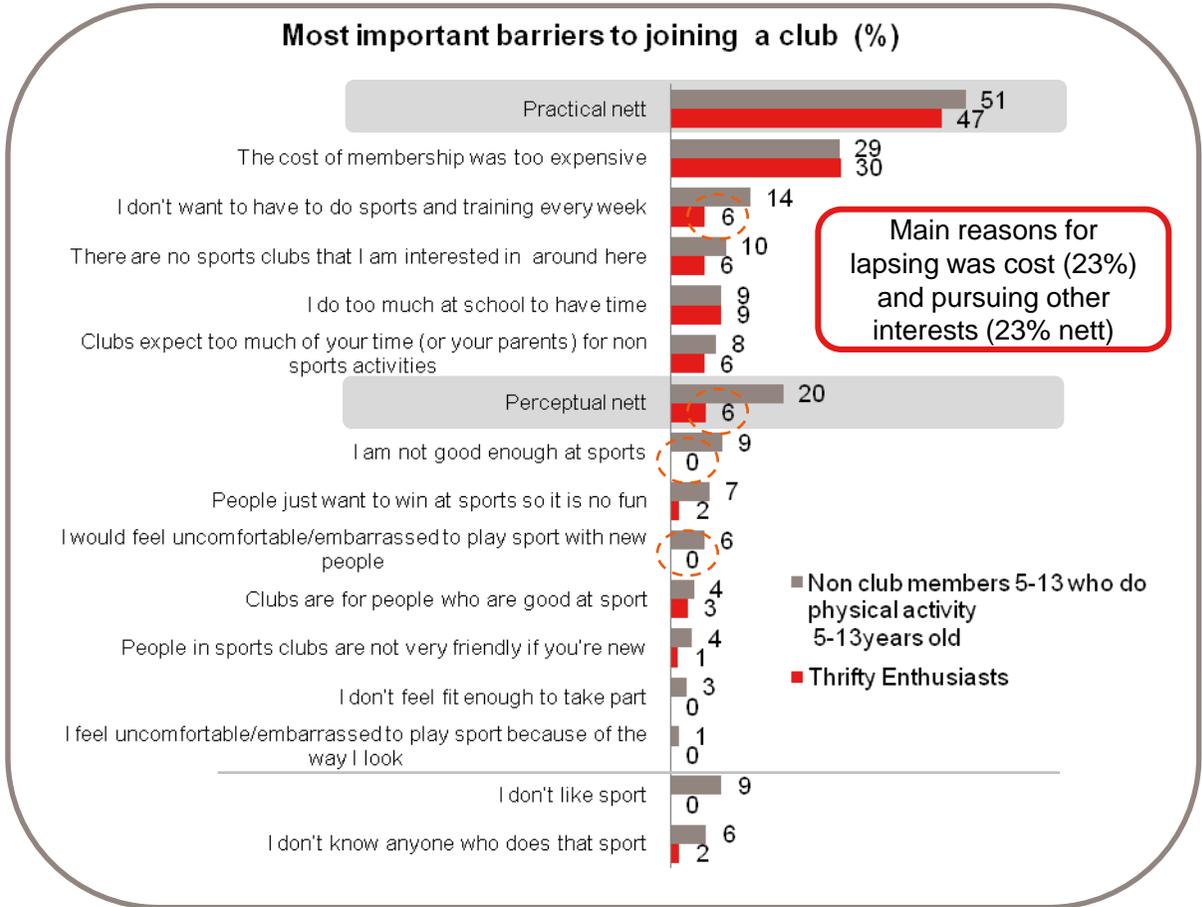
✘
18% vs. 28% total

Previous club membership?

✔
83% vs. 52% non club member

Interest in club membership?

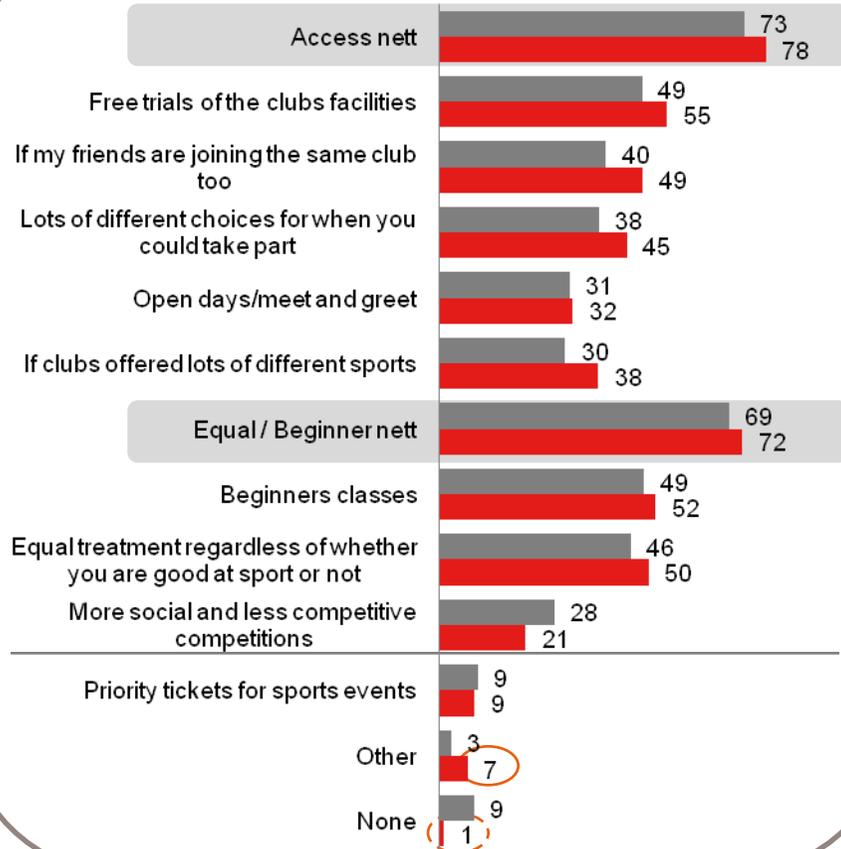
✔
79% vs. 46% non club member



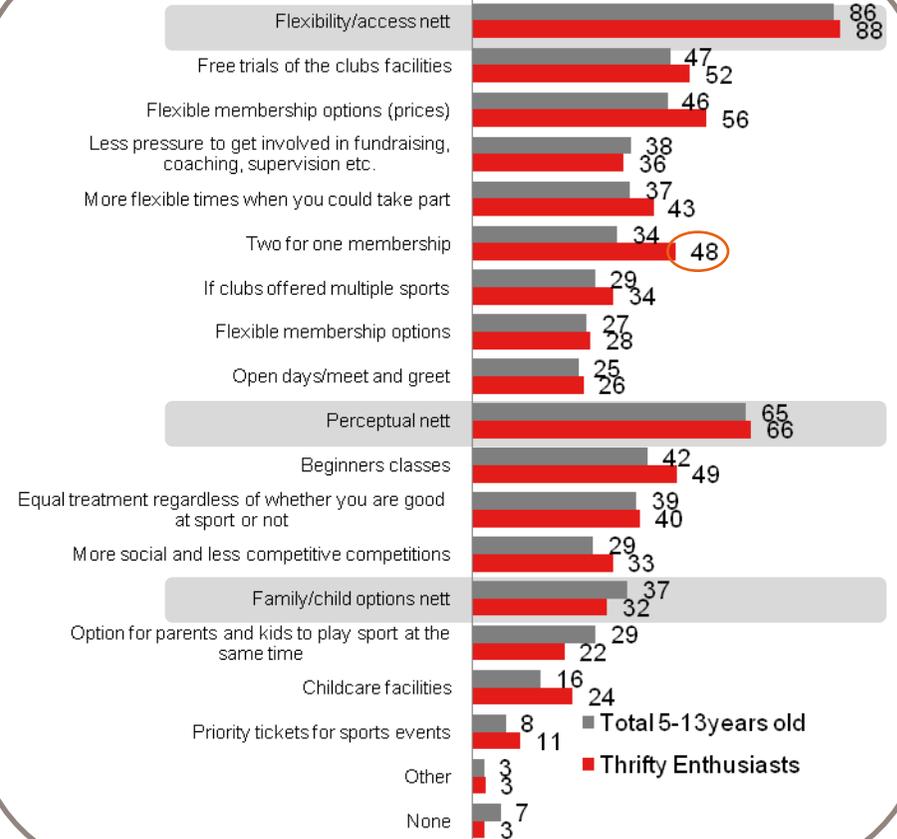


For this segment there are a number of products and services that will appeal. Products that center on making costs of participating in club-based sport more accessible in terms flexible membership pricing options, two for one membership and providing value for money in terms of multiple sports. They also show interest in options that enable entry or beginner level classes and equality. More flexibility in participation times are also appealing.

Potentially encouraged by...(%)



Parents potentially encouraged by...(%)



What to talk to them about? (Products)

Products that provide value for money options (flexible membership pricing, two for one membership and multiple/alternative sports)

Flexible participation times

Beginner classes / streams for different levels

Equality of access and treatment regardless of skill level / membership type

What to say? (Message areas)

There's different options / ways your child/children can join

Club is inclusive and for all levels and members, not elitist

How to say it? (Tone)

Helpful and non judgmental

Where to say it?

Where to look	Total %	Thrifty Enthusiasts %
Internet	41	44
School	15	19
Ask friends or family	21	15
Local newspapers	16	14

Preferred means of contact	Total %	Thrifty Enthusiasts %
School notices/school newsletters	59	61
Email	47	50
Flyers in post-box	39	47
Online/websites	43	47
Newspapers	29	31
Community notice boards	19	24
Sign on days at sports grounds	18	16
Local fairs and fates	14	15
Demonstrations	8	10
Radio/TV advertising	6	9

Ponderers





Pen Portrait

Ponderers make up 1 in 5 Australian children aged 5- 13 years old. They are less likely to come from higher income households, mostly under \$70k per annum and over represented by CALD.

Ponderers are generally less active in sport than other children although most do participate in physical activity for exercise or recreation and are less likely to do organised activities (3 in 5). Ponderers have relatively positive attitudes toward sport especially in terms of the fun and social elements of sport participation.

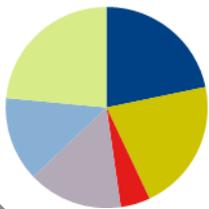
While they don't need to be convinced about the benefits of sport they do have some reservations about clubs being too authoritative and competitive, taking the fun out of sport. Their parents are less engaged in clubs and their perceptual barriers will also need to be addressed as they are likely to perceive clubs to be inflexible, demanding of time beyond sport and also have concerns about the costs of participating in club-based sport.

Ponderers are a potential segment for acquisition showing a high interest in sport involvement if they had information on how to go about it as well as high interest in club membership (3 in 5 are interested).

For this segment, clubs will need to provide opportunities for fun and social participation without overt competitiveness and address practical concerns about cost and commitment.

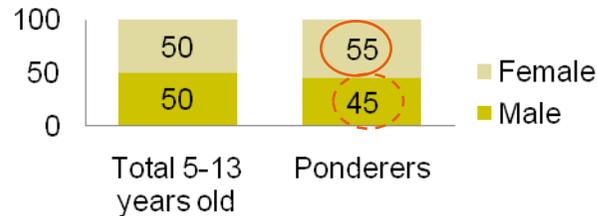
Ponderers make up 1 in 5 Australian children aged 5- 13 years old. They are less likely to come from higher income households, mostly under \$70k per annum and over represented by CALD.

526,617 Australians aged 5-13 years old

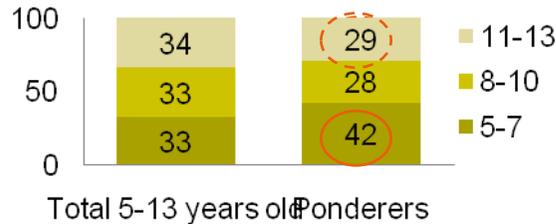


21% of Australian children aged 5-13 years old

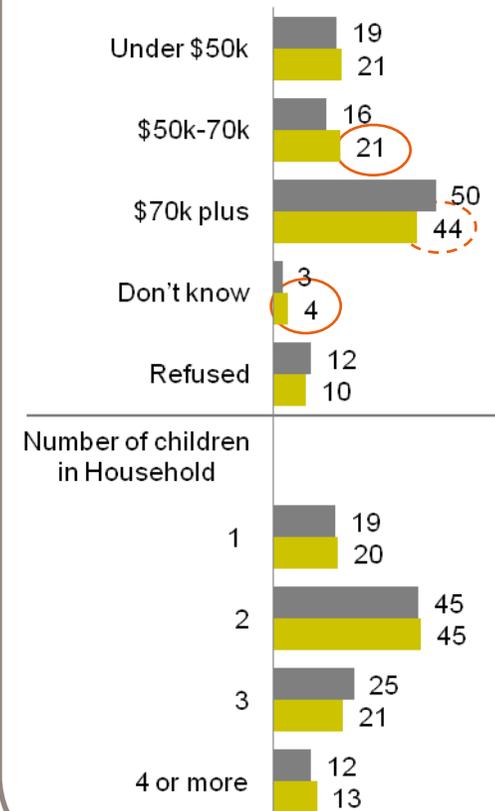
Gender (%)



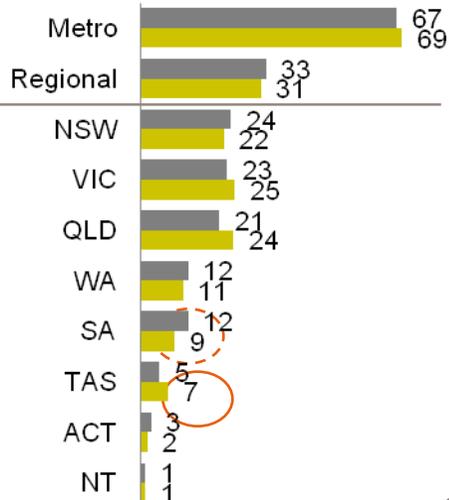
Age (%)



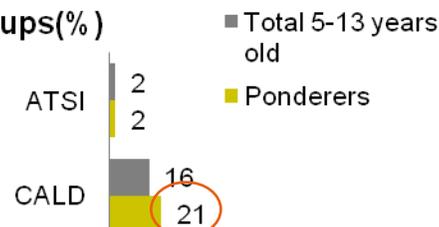
Parents profile (%)



Resides (%)



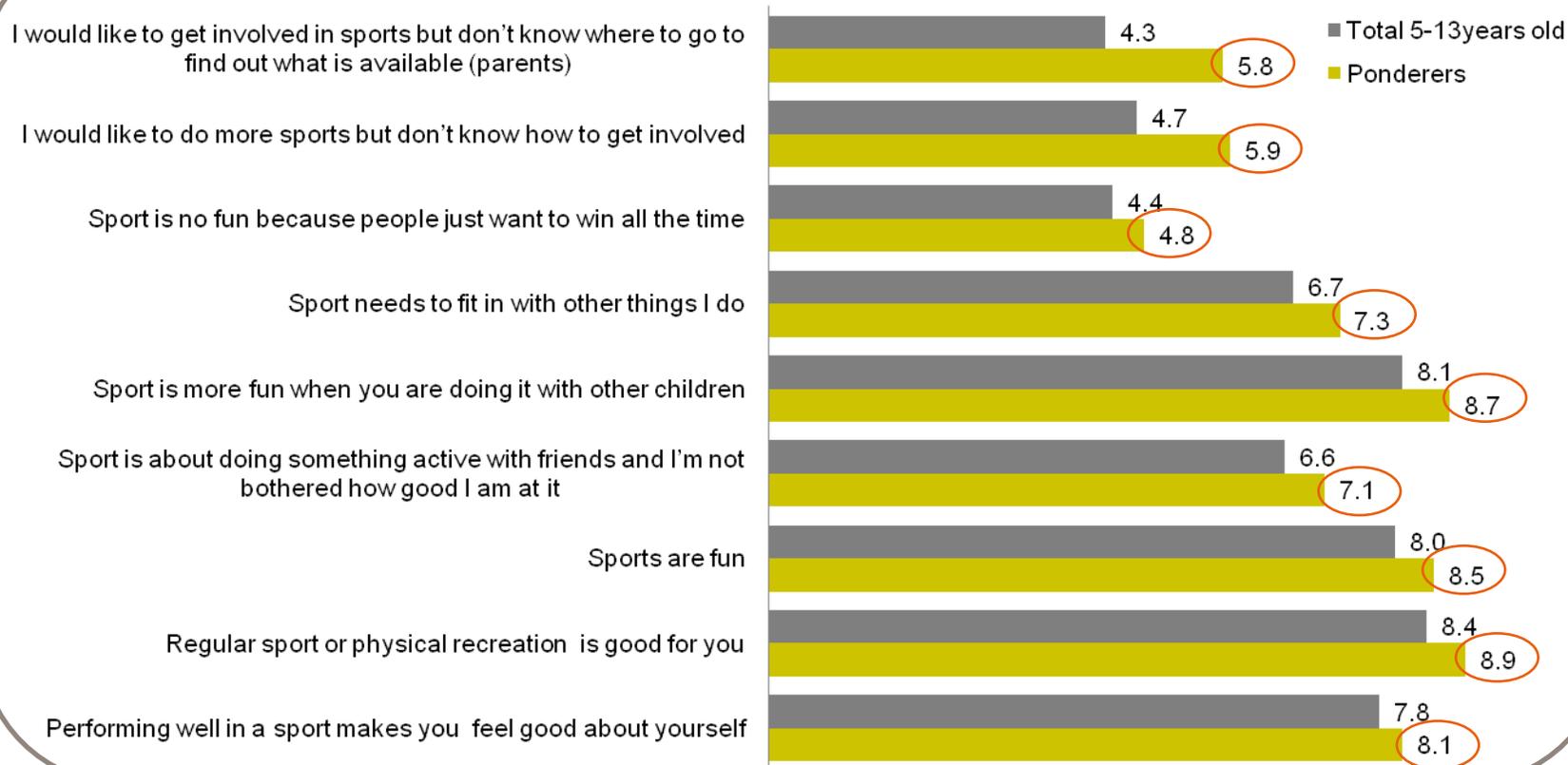
Special Groups (%)





Ponderers have relatively positive attitudes toward sport especially in terms of the fun and social elements of sport participation. They are not however that interested in competition or winning. Importantly, they demonstrate interest in sport but lack the information on how to get involved.

Defining sports attitudes (mean score out of 10)



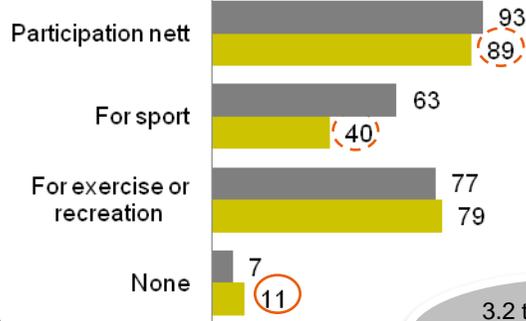
Ponderers

What physical activity are they currently doing?



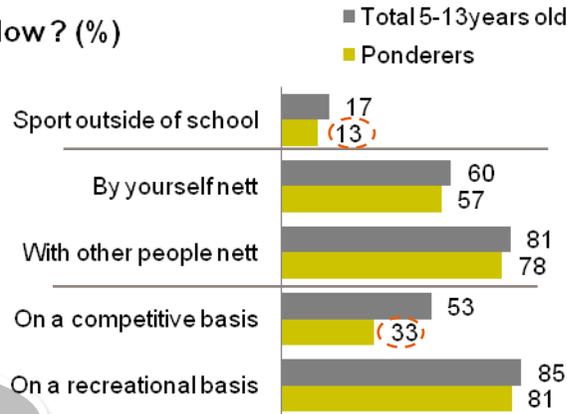
Ponderers are generally less active in sport than other children although most do participate in physical activity for exercise or recreation. They do physical activity only slightly less frequently than the general child population. They are less likely to do organised activities (3 in 5) compared to the child population.

Physical activity (%)

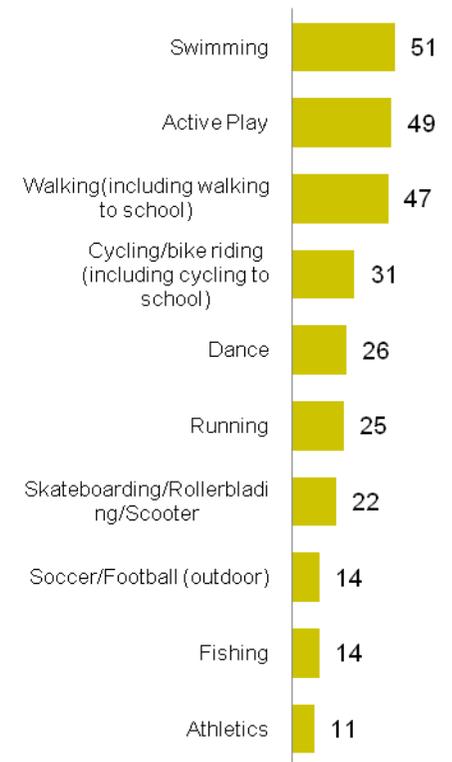


3.2 times a week
(vs.3.8 for total)
(exc. walking to school)

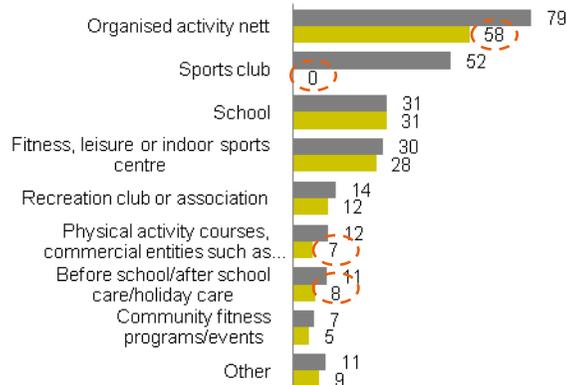
How? (%)



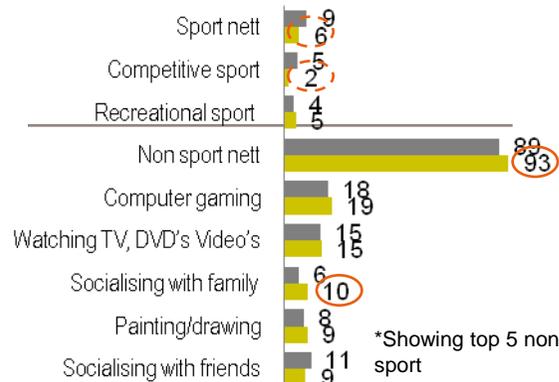
What they do (%)



Organised? (%)



Main interests/hobbies (%)

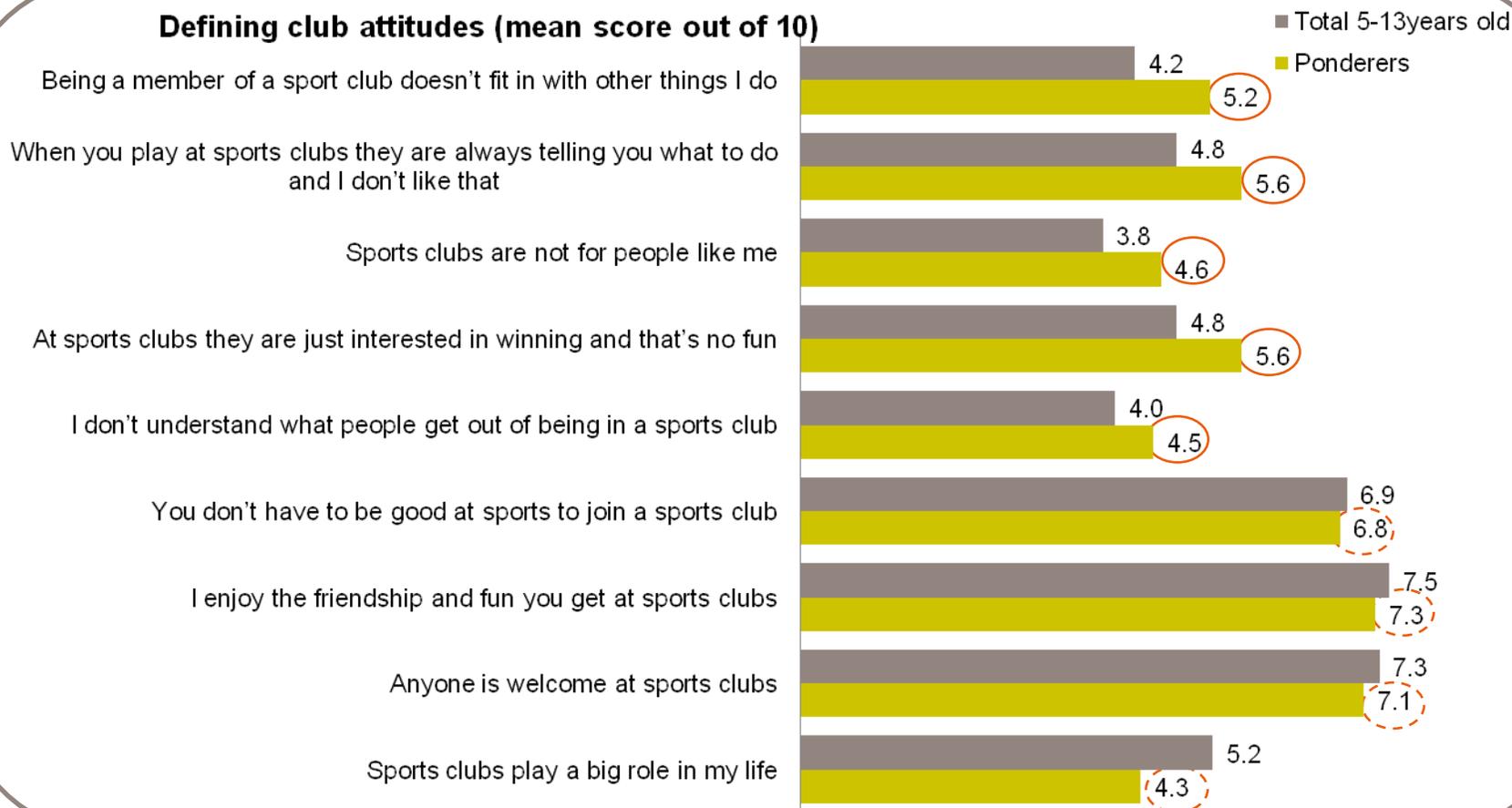


*Showing top 5 non sport



While Ponderers do see the benefits of joining a sports club in terms of facilitating exercise and a sense of pride they do have some reservations about clubs. In particular, that clubs can be too authoritative and competitive, taking the fun out of sport. They also feel that sport club membership doesn't fit in with other things they do.

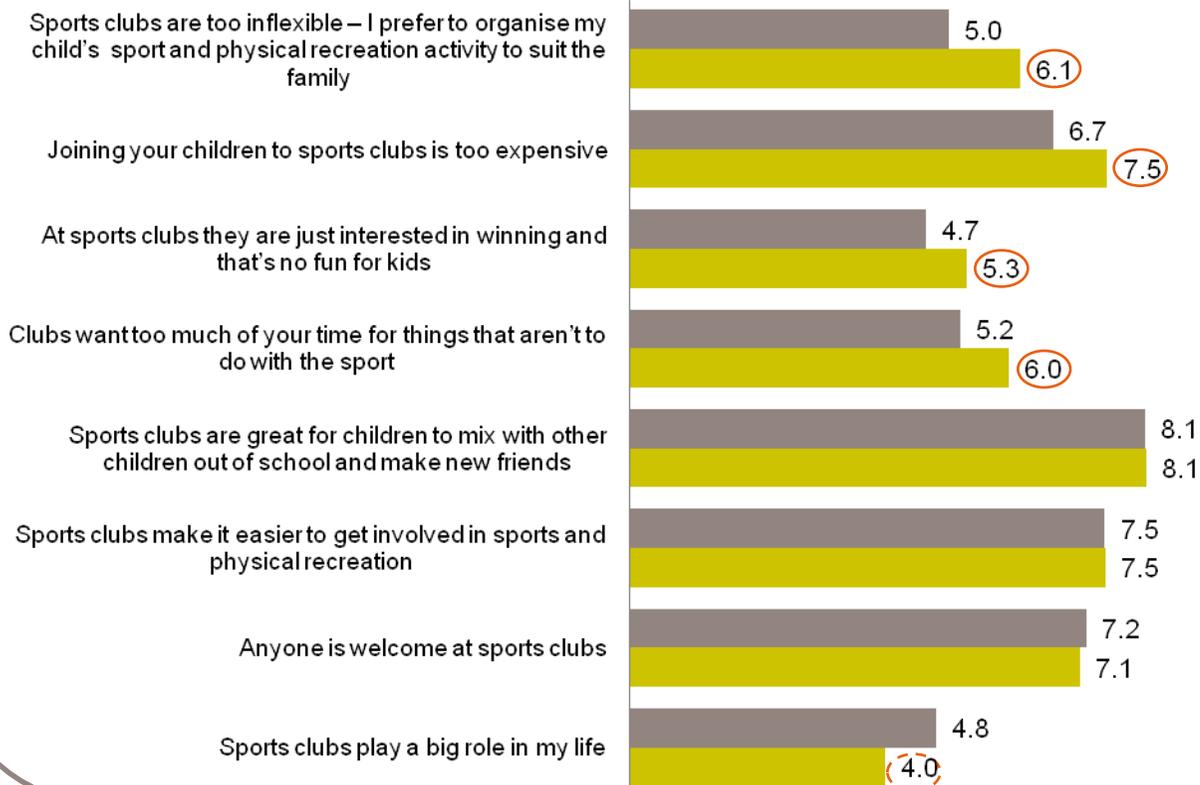
Defining club attitudes (mean score out of 10)



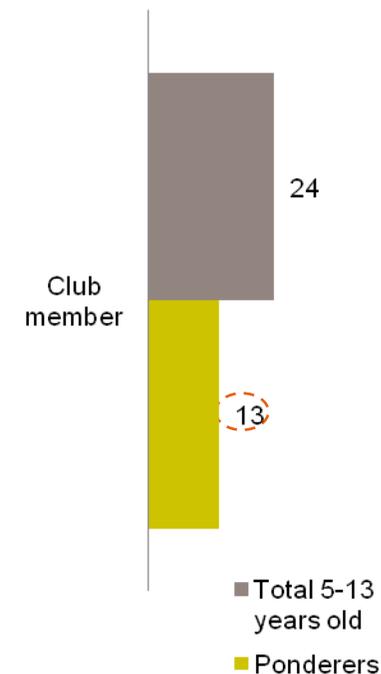


Parents of Ponderers are unlikely to be club members (1 in 10). Parent's perceptual barriers will need to be addressed as they are likely to perceive clubs to be inflexible, demanding of time beyond sport and also have concerns about the costs of participating in club-based sport.

Parents attitudes to clubs (mean score out of 10)



Parents club membership status





Ponderers are a potential segment for acquisition showing a high interest in sport involvement if given information on how to go about it as well as interest in club membership (6 in 10 are interested in club membership). To appeal to this segment it is imperative to address the concerns about cost and time commitment among parents of Ponderers.

Interest in doing more sports?



51% vs. 28% total

Previous club membership?

63% vs. 61% non club member

Interest in club membership?

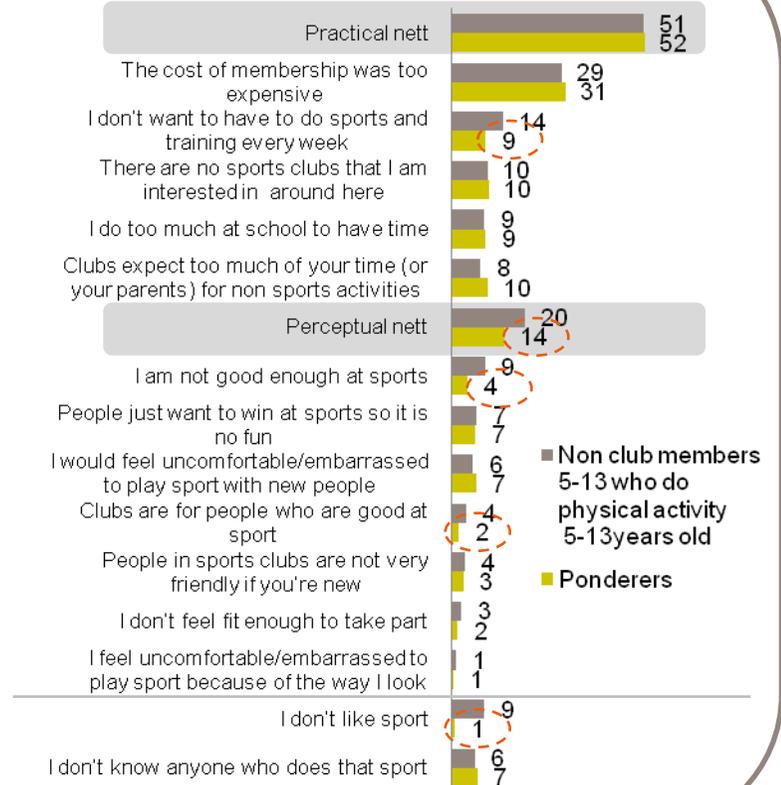


57% vs. 46% non club member

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=323)

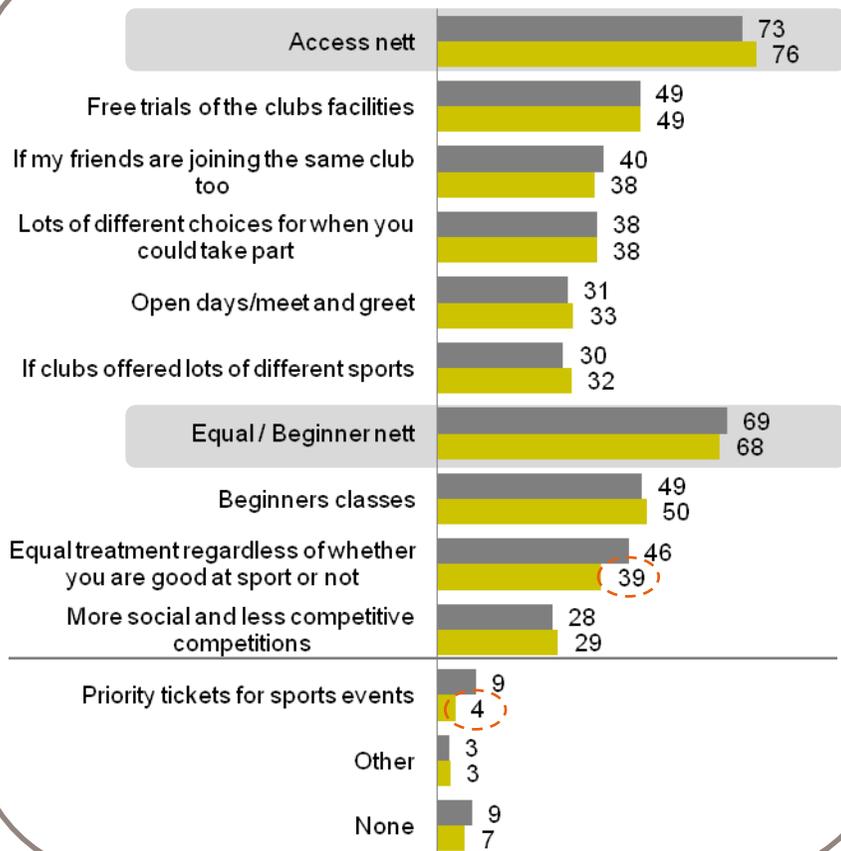
Swimming	24
Dance	16
Soccer/Football (outdoor)	14
Gymnastics	11
Athletics	10
Cycling/bike riding (including cycling to school)	10
Basketball	9
Martial arts	9
Active Play	9
Fishing	8
Running	8
Skateboarding/Rollerblading /Scooter	8
Tennis	7
Horse riding/Equestrian	7
Walking(including walking to school)	6

Most important barriers to joining a club (%)

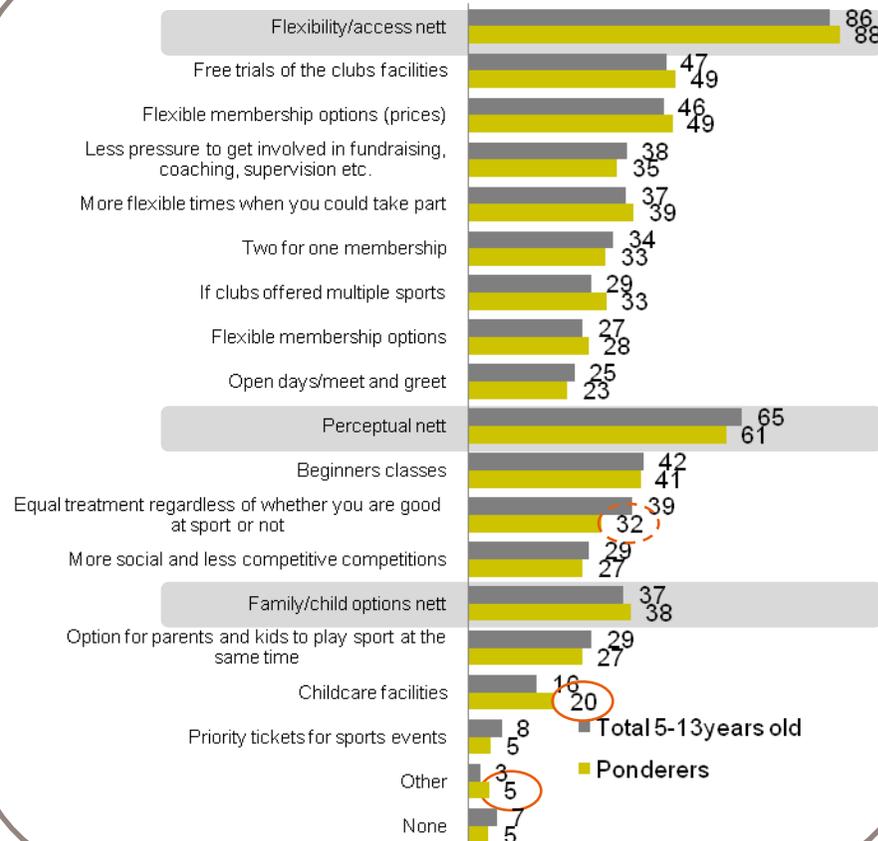


For this segment, products and services focused on fun and social sport participation such as those that cater to entry level or beginner classes where friends can join are appealing. For parents, where cost is also a barrier, they are attracted to products and services that can make club-based sport participation more accessible via flexible membership pricing and free trials. Membership with less pressure to commit beyond sport participation will help to address their time commitment concerns.

Potentially encouraged by...(%)



Parents potentially encouraged by...(%)



What to talk to them about? (Products)

Products and services that focus on fun and social participation

Beginner classes / classes for different levels

Options that provide value for money – free trials or family / membership (child and parent)

Options that focus on sport participation without additional time / resource commitments from parents

What to say? (Message areas)

Membership and participation is fun and social (avoid competitive overtones)

Do it in your own time

Membership for all – regardless of level

How to say it? (Tone)

Helpful and Encouraging

Where to say it?

Where to look	Total %	Ponderers %
Internet	41	44
School	15	17
Local newspapers	16	17
Ask friends or family	21	15

Preferred means of contact	Total %	Ponderers %
School notices/school newsletters	59	61
Online/websites	43	45
Email	47	42
Flyers in post-box	39	39
Newspapers	29	24
Community notice boards	19	19
Sign on days at sports grounds	18	16
Local fairs and fates	14	12
Demonstrations	8	7



SEGMENT OF NON MEMBERS WITH
LOW POTENTIAL FOR ACQUISITION

Sport Resistant





Pen Portrait

The Sport Resistant make up 1 in 5 of Australian children. They are more likely to be female and from households with low to medium incomes (under \$70k per annum).

The Sport Resistant simply don't understand what other people get out of sports or physical activity and have little appreciation of the social benefits that other children usually value in sport. For them sport isn't fun and is too competitive.

As such, they strongly feel sports clubs are not for them and do not understand any benefits to joining a club. This stems from their distain for sport and perceptions of clubs being too competitive and exclusive (that you have to be good at sport).

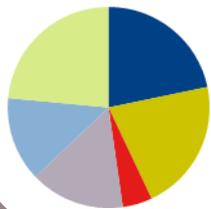
Their attitudes are likely to be shaped by their parents who also demonstrate more negative perceptions about clubs in terms of being too competitive, inflexible, expensive and time consuming.

This would be a very challenging segment to engage – in part as it would require a basic education campaign on the benefits of sports and even for some physical activity to personal health and well-being. This will need to target the segment themselves and their parents. There are few products or arguments to convince this segment or their parents to join them in a sports club.



The Sport Resistant make up 1 in 5 of Australian children. They are more likely to be female and from households with low to medium incomes (under \$70k per annum).

537,374 Australians aged 5-13 years old



22 % of Australian children aged 5-13 years old

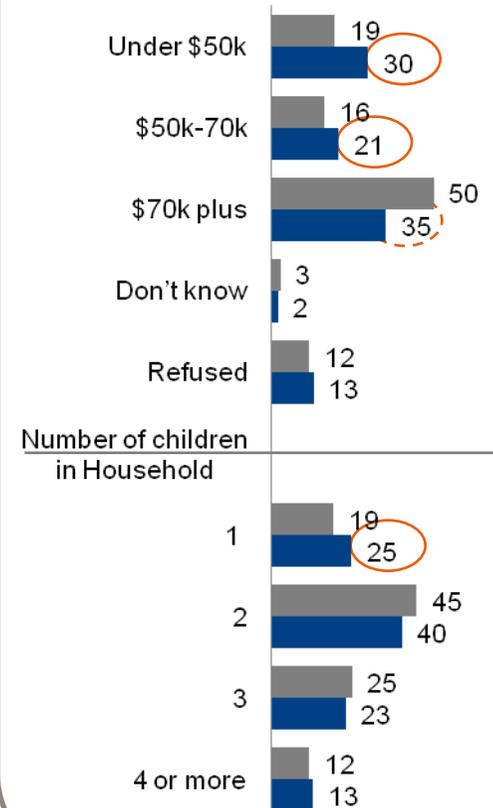
Gender (%)



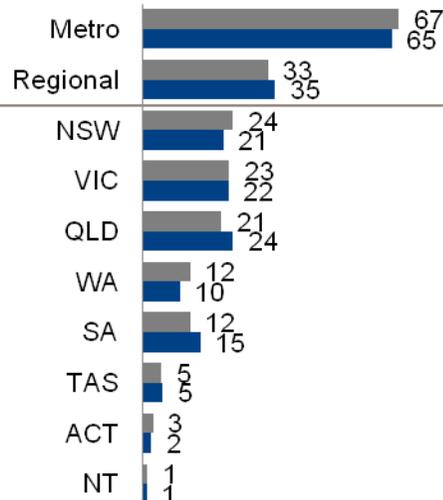
Age (%)



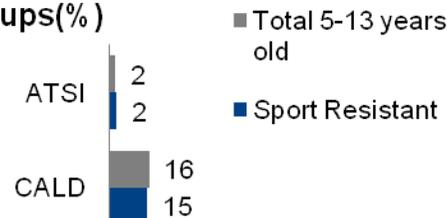
Parents profile (%)



Resides (%)



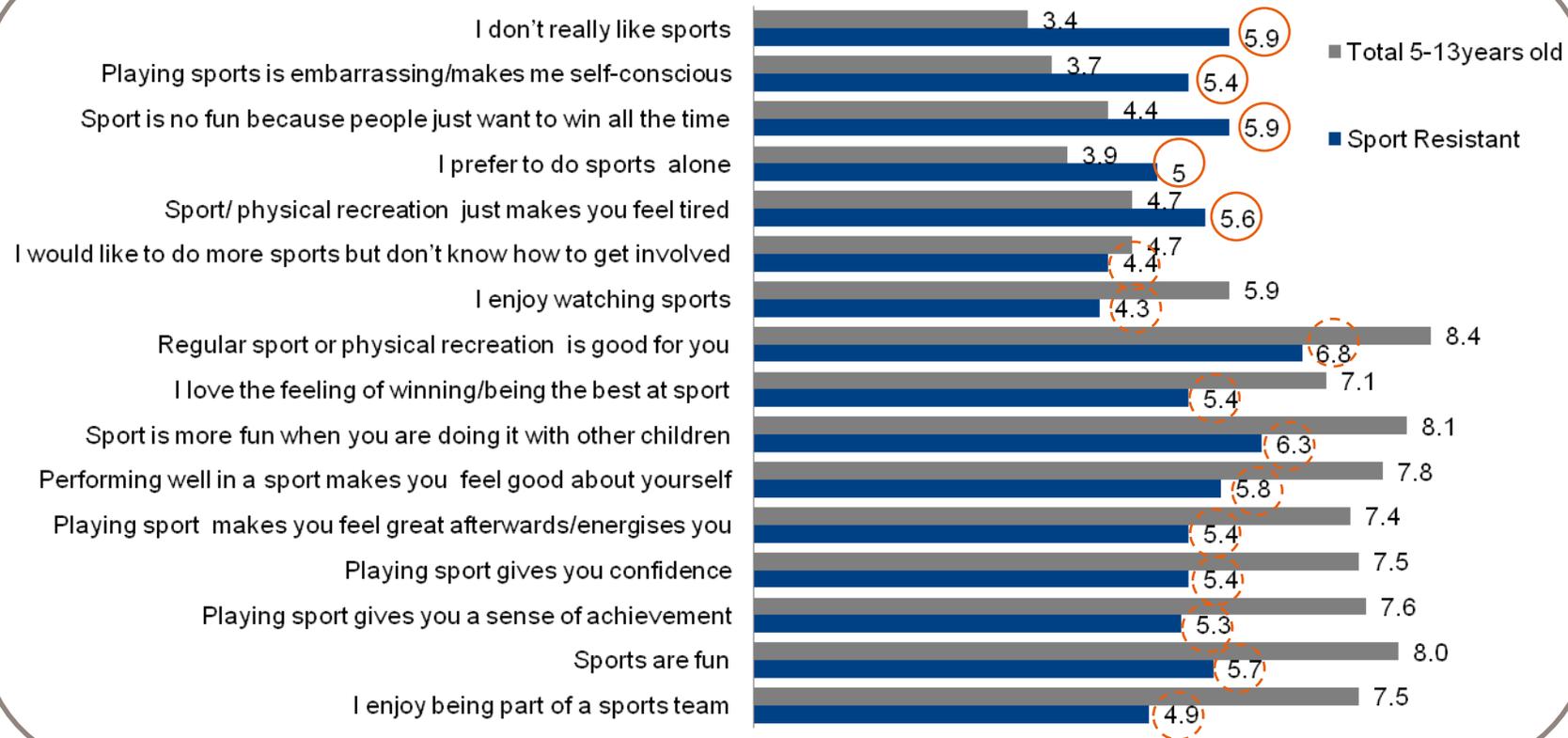
Special Groups (%)





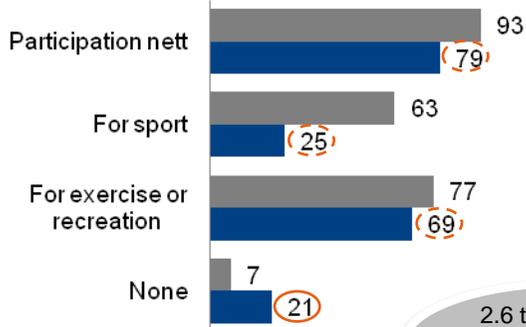
The Sport Resistant simply don't understand what other people get out of sports or physical activity and have little appreciation of the social benefits that children usually value in sport. For them sport isn't fun and is too competitive.

Defining sports attitudes (mean score out of 10)



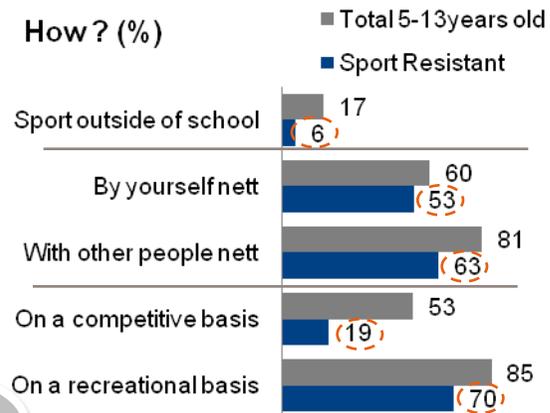
The Sport Resistant are less physically active than other children and only 1 in 4 do sport. They mainly participate for recreational or exercise and are less likely to do activities with other children. As such, sport rarely figures as a main interest or hobby for these children.

Physical activity (%)

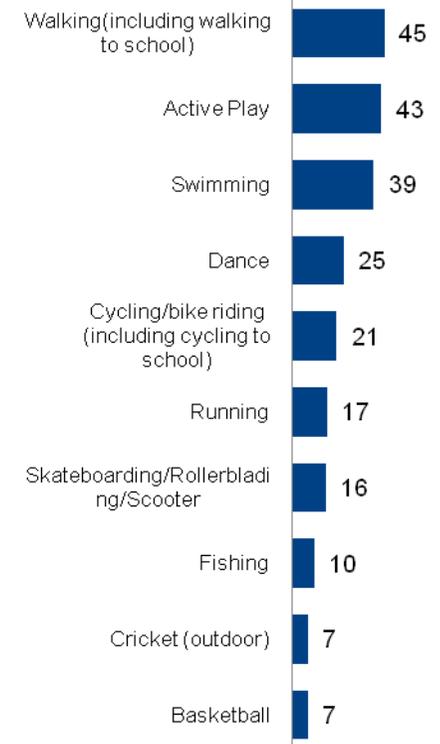


2.6 times a week
(vs.3.8 for total)
(exc. walking to school)

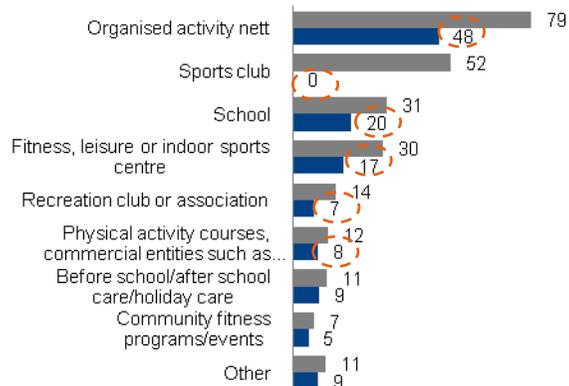
How? (%)



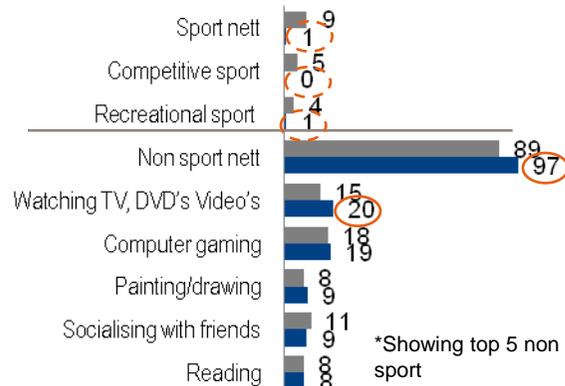
What they do (%)



Organised? (%)



Main interests/hobbies (%)

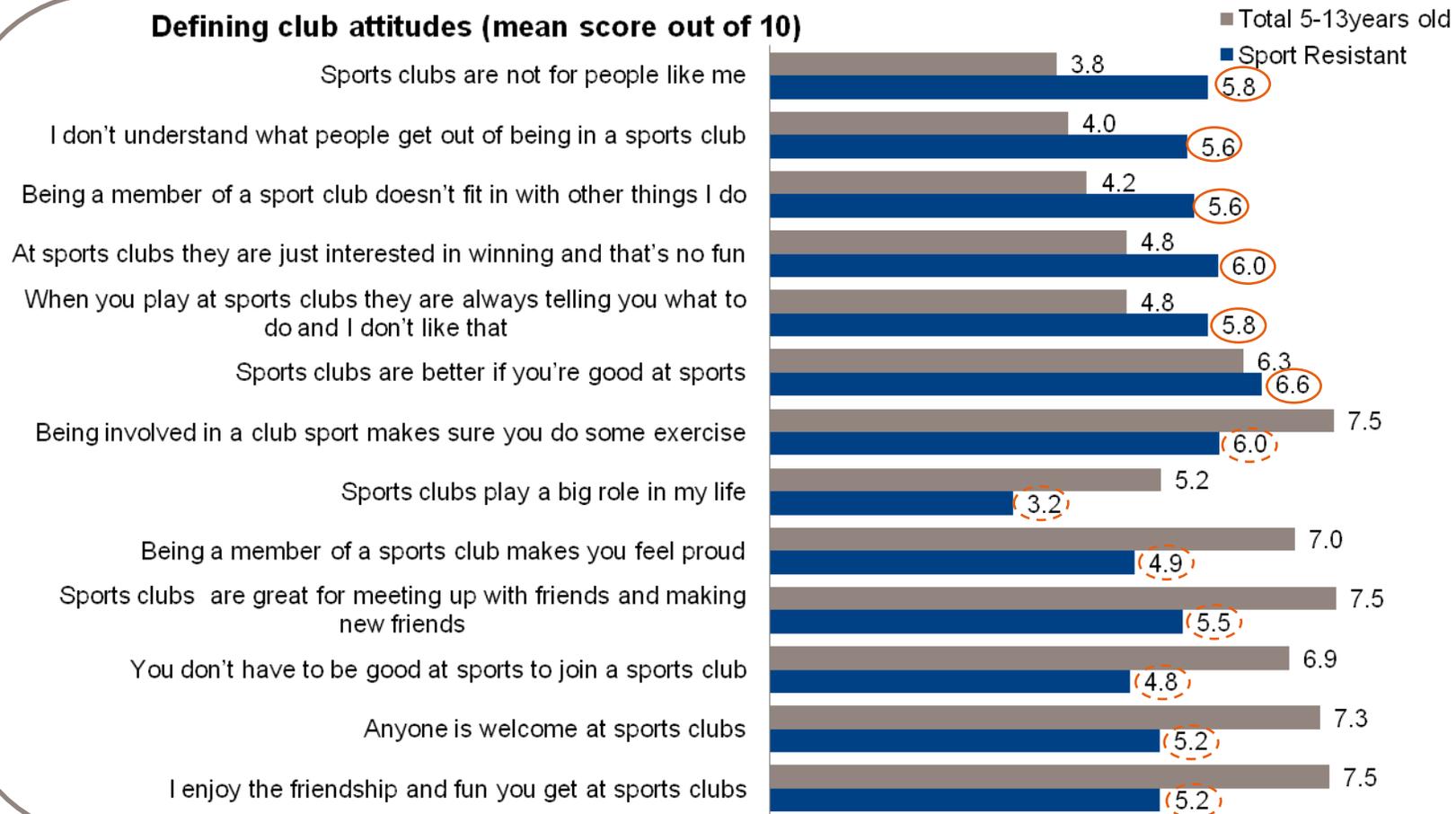


*Showing top 5 non sport



The Sport Resistant strongly feel sports clubs are not for them and do not understand any benefits to joining a club. This stems from their distain for sport and perceptions of clubs being too competitive and exclusive (that you have to be good at sport).

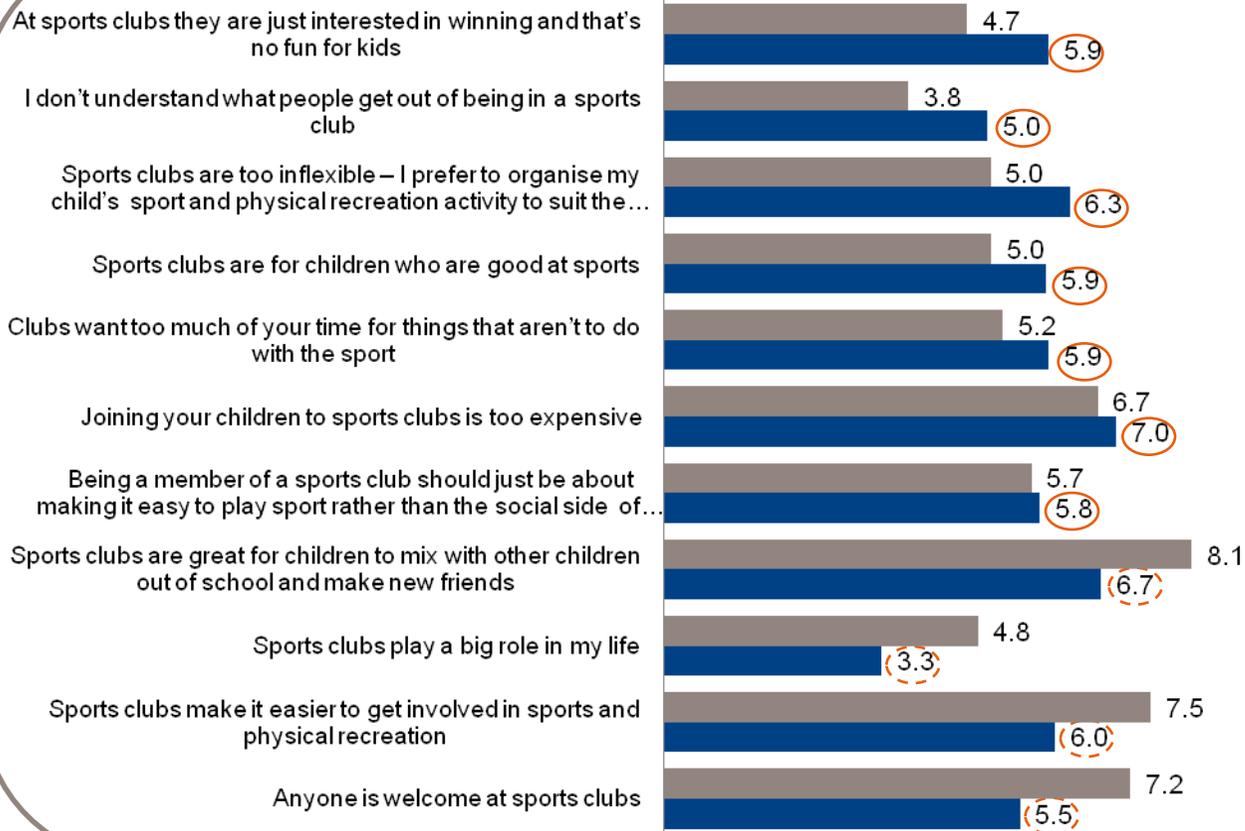
Defining club attitudes (mean score out of 10)



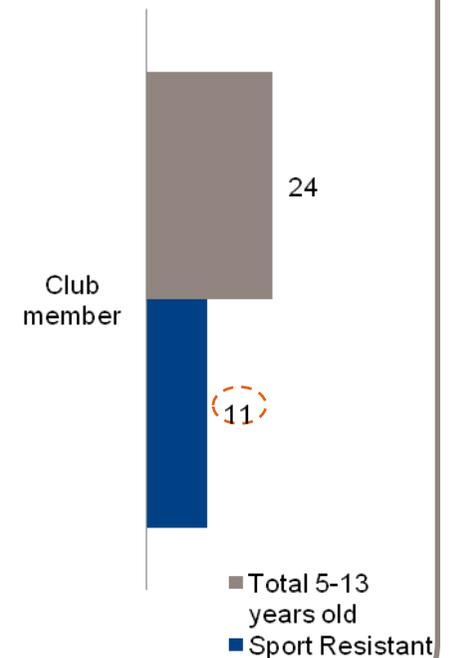


Their attitudes are likely to be shaped by their parents who also demonstrate more negative perceptions about clubs in terms of being too competitive, inflexible, expensive and time consuming. Parents of the Sport Resistant are less likely to be club members (only 1 in 10).

Parents attitudes to clubs (mean score out of 10)

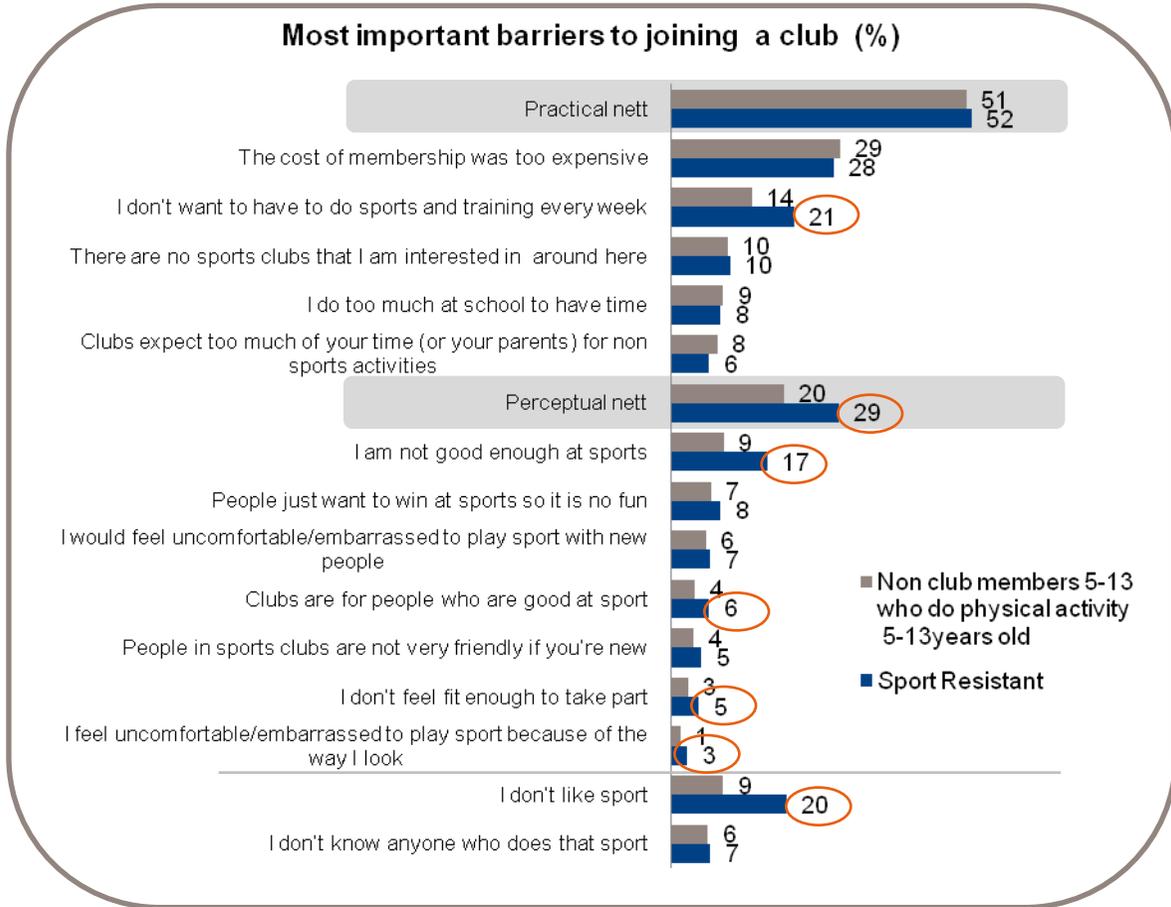
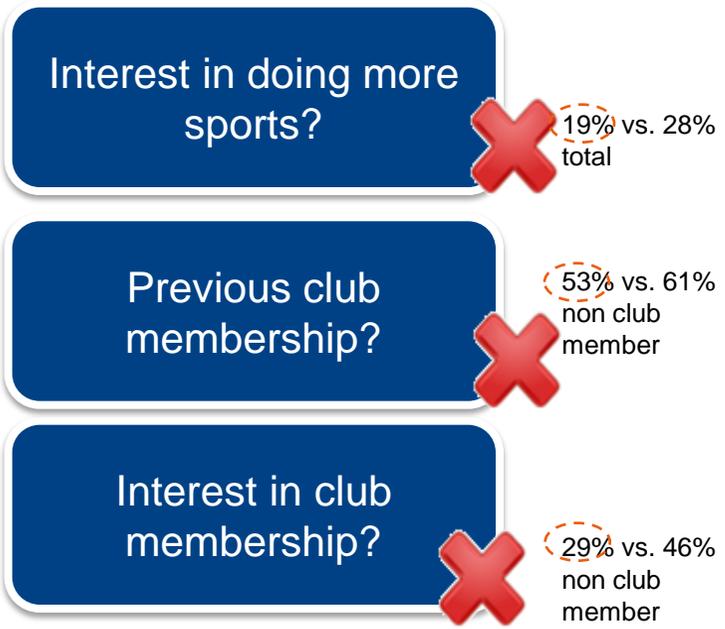


Parents club membership status



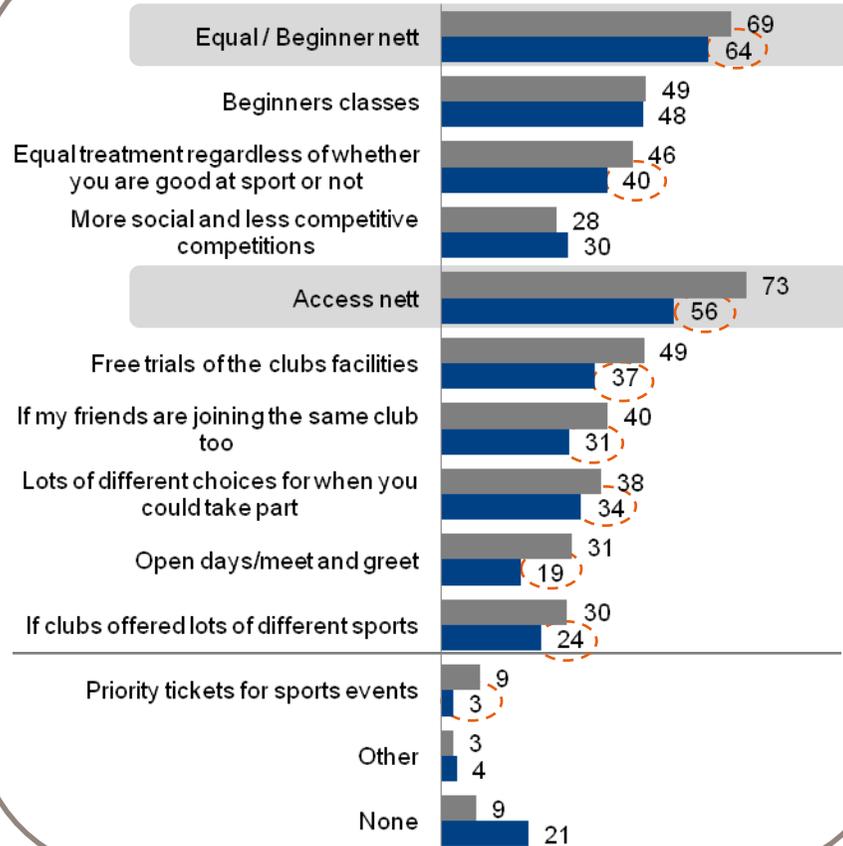


The Sport Resistant show little potential for acquisition. They are less likely than other children to show interest in doing more sport if provided information on how to go about it and lower interest in club membership. Their main barriers to club membership are a fundamental dislike of sport in part driven by their perception that they are not good enough at sports. As such, their parents are unlikely to be able to justify the costs of participating in club-based sport.

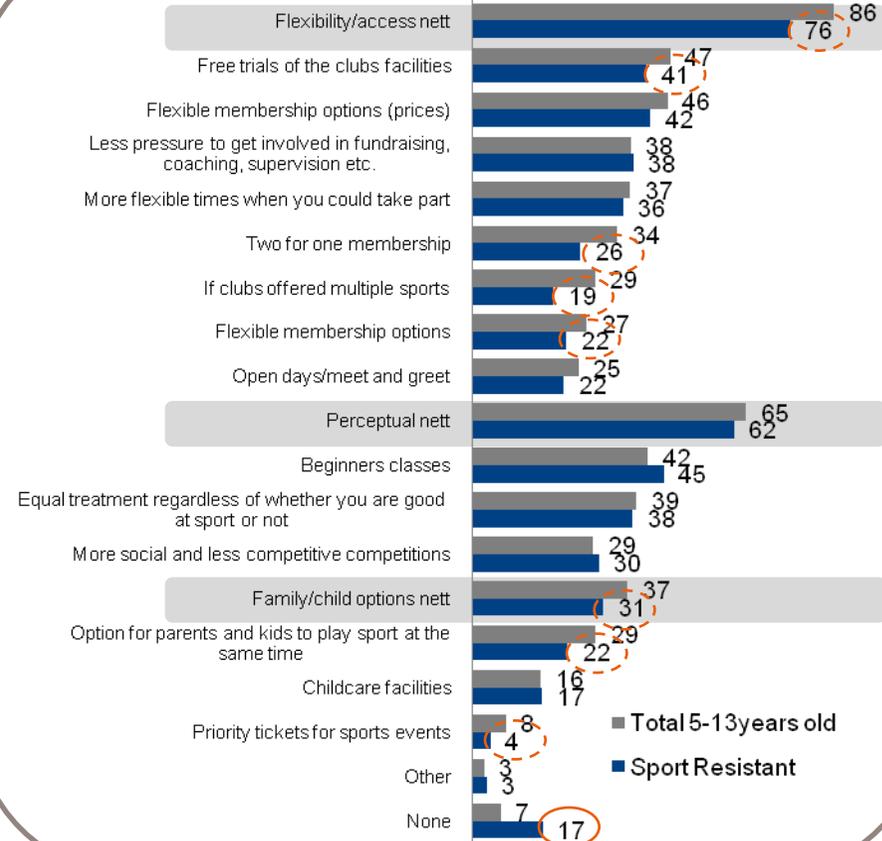


There is very limited potential for bringing Sport Resistant into clubs and trying to do so would be a poor investment of resources. A less competitive ethos would help but typically these children and their parents are antithetical to sport and clubs.

Potentially encouraged by...(%)



Parents potentially encouraged by...(%)



What to talk to them about? (Products)

Firstly, any marketing to this segment will require an education campaign on how sports can benefit them ... and will require education to their parents as well

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 that can encourage them to feel that sport is fun again

What to say? (Message areas)

Physical activity / exercise / sports is for everyone

Sport is fun and everyone can do it

Sport helps you to make friends, feel good about yourself

How to say it? (Tone)

Encouraging and reassuring

Where to say it?

Where to look	Total %	Sport Resistant %
Internet	41	36
School	15	20
Ask friends or family	21	18
Local newspapers	16	18

Preferred means of contact	Total %	Sport Resistant %
School notices/school newsletters	59	51
Email	47	36
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Online/websites	43	33
Newspapers	29	26
Community notice boards	19	16
Local fairs and fates	14	11
Sign on days at sports grounds	18	10



Acknowledgements

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Australian Government
Australian Sports Commission

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