



Australian Government
Australian Sport Commission

Culturally and Linguistically Diverse Audiences (CALD)

MARKET SEGMENTATION FOR SPORT PARTICIPATION



National Sport Research
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INCREASING CULTURAL DIVERSITY WILL HAVE A BIG IMPACT ON HOW THE SPORT SECTOR PLAN FOR AND SHAPE THE DELIVERY OF SPORT FOR FUTURE GENERATIONS!

The Market Segmentation for Sport Participation is the first among an integrated programme of evidence-based research being led by the ASC with the aim of helping sports get the best bang for their buck in terms of acquisition and retention of sports' participants, as well as to better understand the market place and the needs of the consumers of sport in Australia.

The Market Segmentation Study provides key insights regarding how participation in sport among the Australian adult and children population is affected by:

- ❖ Sport delivery that focuses on competition rather than fun and enjoyment
- ❖ A lack of flexibility around the scheduling of sport in traditional sporting clubs
- ❖ Organising individuals and teams according to talent rather than retaining friendship groups
- ❖ Limited opportunities for people with limited sports competency to join sporting clubs
- ❖ Self-consciousness amongst adolescents and embarrassment by their lack of sporting ability

The Study identifies ten consumer segments among the Australian adult population:

- Current club member segments – Loyalists, Socially Engaged, Sport Driven and Apathetic Clubbers
- Non-club member segments – Sidelined Sportsters, Club Wary, Ponderers, Self Focused, Sport Indifferent and Sport Atheists

The Study identified six consumer segments among the Australian children's population (aged five to 13 years):

- Current club member segments – Social Loyalists, Sport Driven and Apathetic Clubbers
- Non-club member segments – Thrifty Enthusiasts, Ponderers and Sport Resistant

Market Segmentation involves dividing a market into groups of people or consumers with similar needs, attitudes and behaviours

The findings in this summary are drawn from the research outcomes of the Market Segmentation for Sport Participation – Adults aged 14-65 years old and Children aged 5-13 years old – and **focus on culturally and linguistically diverse (CALD) audiences** and their relationship to physical activity, sport and sport clubs.



HOW CAN SPORT BETTER CATER FOR CALD AUDIENCES AND WHAT ARE THEIR UNIQUE NEEDS?

The good news from an evidence base perspective is, overall, many of the attitudes and behaviours expressed by CALD audiences matched those expressed by the broader Australian population.

However, there were some key findings which emerged around specific and unique behaviours, attitudes, opinions and concerns of CALD audiences:



Positive attitude to sport participation

Higher levels of participation in organised physical activity



CALD less likely to do organised physical activity with a sport club

More likely to be involved with fitness, leisure or indoor sports centres, recreational clubs or community programs



The social aspect of sport is even more important to CALD audiences

But sport clubs are less likely to be perceived by CALD as avenues relevant to them to socialise or make friends



Nevertheless, if barriers are lifted off and the right environment is created, CALD audiences often talked about sport clubs as having great potential to assist with settlement, and find a place in the community.

Some perceived potential benefits of sport club membership:

- Assisting with settlement, particularly for new emerging communities
- Finding a place in the community and getting in touch with community infrastructure
- Generating a sense of inclusion and acceptance for new migrants but also for more established immigrant communities
- Continuing their enjoyment in playing sport as they had previously done in their home countries
- For established communities, foster links within their communities

But overall for CALD audiences, although there were some strong positive emotional connections with their sport clubs, sport clubs service largely functional needs:

- More likely to have interest just for using facilities at a club

What are the barriers to sport club participation?



CALD audiences mentioned similar barriers to the general population in regards to sport club members and clubs being cliquey and exclusive.

They also held similar opinions in regards to the perceived need to be competitive, skilled and dedicated to gain acceptance in sport clubs

Some issues however were exacerbated and spoken of as being more prohibitive barriers than they were by the general population:

- The cost of clubs was seen as prohibitive, particularly so for CALD from new and emerging communities and those with dependents, whose resources may already be stretched
- For young CALD people in particular, excellence and dedication in academia and school work is seen as a much higher priority than sport participation
- Sport clubs were seen to need improvement in understanding and managing cultural sensitivities better, in particular toward women

Perceptions of sport clubs were also a strong barrier:

- CALD audiences felt that they were not as welcome in sport clubs and were intimidated at the prospect of joining
- This was exacerbated for those who did not feel their skill levels would be high enough to fit into the perceived competitive culture of sport clubs
- Many talked, in the qualitative research phase, about their fear, experienced or perceived, of discrimination and racism being directed towards them
 - This was a significant barrier and runs counter to the potential benefits of fostering inclusion, and helping individuals and communities cross social or cultural boundaries

Are there opportunities to increase participation?

CALD audiences are likely to be a receptive audience to communications about sport and clubs.



They were more likely to be interested in future sport club membership should their circumstances allow

Over one in ten were extremely interested in joining a sport club. This was significantly higher than other Australians



CALD individuals appear to lack information about where and how to get involved in club sport



THE SEGMENTATION

The CALD subgroup is significantly over-represented in three key segments of the Australian population 14-65 years old:

RETENTION



SPORT DRIVEN

AT RISK OF LAPSING MEMBERSHIP

It is important to re-invigorate this segment to avoid them moving on to non-club sport or out of sport altogether

For Sport Driven, it is about products and services that are flexible while still facilitating participation of sport, with sport at its core

Clubs need to address the issues of time commitment and increasing costs:

- Flexible membership options (including pricing) are important for this segment

ACQUISITION



CLUB WARY & PONDERERS (to lesser extent)

POTENTIAL FOR ACQUISITION

For the Club Wary, they are already physically active, so the goal is to move them to the action and then maintenance stages of change in regards to attitudes and behaviour to clubs

Clubs will need to overcome perceptions that clubs can be 'exclusive' or 'clicky':

- Through trial offers and products that promote sport that is more inclusive to encourage consideration and trial

For Ponderers, the goal is to move them to the action stage of change on one or ideally both variables of attitudes and behaviour to physical activity and attitudes and behaviour to clubs

Time is a major barrier:

- the focus will be on increasing consideration and trial by providing products and services that address their busy lifestyle and family commitments



THE IMPORTANCE OF TARGETED COMMUNICATION



Awareness barriers need to be addressed as many among the CALD audience do not know where to look for clubs or how to join

①

Communication should aim to promote inclusiveness by addressing perceptions that clubs are exclusive and membership is solely dependent upon on skill level. For example:

- Clubs welcome the diversity of all Australians in terms of culture, age, ethnicity and so on

②

Raise awareness of what sport clubs are and that they are out there:

- What one can do in a club
- Availability of where and how to get information about joining

③

There is also evidence to support specific CALD communication strategies utilising community and cultural networks in order to:

- Raise awareness of sport clubs and opportunities for membership for CALD community members
- Develop products and services that take in to account cultural sensitivities and needs

CALD audiences tend to respond well to offers of joining mainstream organisations when this is communicated through trusted sources such as community and cultural networks.

Local sport clubs have a role to play in communicating to people where they live (e.g. local flyers and newspapers, school and universities). Clubs may consider providing information about the products and services they have specifically developed to overcome barriers (if any) and communications that support the broader national message of inclusiveness that are relevant to their community.



CHILDREN 5-13 YEARS OLD - CALD

There weren't many differences in the perceived benefits and motivations for physical activity or sport between CALD children and the total Australian children population.

There were other differences, the main ones being highlighted here below:



CALD children even more likely to enjoy watching sports



CALD children less likely to participate in active play

Frequency of participation for CALD children lower than the total children population (2.7 vs. 3.8 / week)

Among CALD, competitive sport considered a hobby by significantly less children



CALD children more likely to:

- Feel sport competed with other things they do
- Be too competitive because people want to win all the time
- Cite competing commitments at school or too much at school in general
- Lack information about how to go about getting involved

Club sport



CALD children just as likely to be members of clubs or join

No differences in general attitudes to club membership

Specific (for CALD children more so) reasons to join a club:

- New opportunities/ facilities in the area
- Just to get exercise

Particular interest in swimming among CALD children (current participation and if increase)



CALD non-members more likely to hold more negative associations with clubs:

- In particular attitudes relating to competitiveness

Parents of CALD non-club members even more likely to hold negative association with clubs, relating to:

- Cost
- Time commitment
- Competitiveness





CALD children less likely to be informed through local newspaper

Information through school is the preferred option, although to a lesser extent than for other Australian children

The Segmentation

The CALD subgroup is significantly more represented in 2 highly strategic segments of the Australian children population 5-13 years old:

RETENTION



SPORT DRIVEN

Sport Driven have significant potential to stretch participation within clubs or even through other clubs

Retention by increasing flexibility and focus on the sport

Products and opportunities for sport participation that are more flexible

Ensure environment is welcoming and ensures equal treatment for all skill levels and individuals

ACQUISITION



PONDERERS

Ponderers demonstrate a high potential for acquisition

Encourage 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

Products that address concerns (costs related to their children being a member) will also be important for parents, especially given the high levels of competing interests for CALD school aged children.



WHERE TO FROM HERE?

More information can be found at www.researchinsport.com.au

For our sport sector partners, a copy of the full Market Segmentation for Sport Participation report can be obtained by contacting asc_research@ausport.gov.au

