



Australian Government
Australian Sports Commission

PLAY.

SPORT.

AUSTRALIA.

*The Australian Sports Commission's
participation game plan*



Two challenges, millions of solutions, *Play. Sport. Australia.*

WE'RE FACING TWO SIGNIFICANT ISSUES:



Keeping sports relevant and viable

Sports are operating in a rapidly changing environment where Australians are increasingly time-poor, have limited budgets and are inundated by new forms of entertainment. Preferences towards other leisure activities are on the rise eroding sports' traditional customer bases.¹



Keeping Australians active and healthy

Too many Australians, young and old, are leading increasingly sedentary lives² and are missing out on the multitude of benefits that come from participating in sport.

But the Australian Sports Commission's (ASC) research into the sports participation market reveals a significant opportunity for sporting organisations to potentially recruit over 4.5 million Australians.³

THE OPPORTUNITY:

3.7 million

adults



kids

880,000



New members
of sporting organisations across Australia





WHY IS SPORT IMPORTANT

TO AUSTRALIANS?

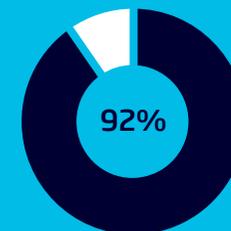
Australians love sport. It is a defining characteristic of our national culture – one that is recognised across the world. In sport, Australia's diverse population discovers a shared identity. We come together to play sport at local ovals, fields, courts, parks and beaches. We flock to great stadiums around the country to watch the contest. We celebrate and exude national pride when our athletes represent us on the world stage.

The numbers are compelling. Approximately 6.5 million Australians participate in organised sport⁴ and 7.6 million attend live sporting events each year.⁵ Ninety-two per cent of adult Australians have an interest in at least one sport, and six on average.⁶ Importantly, 2.3 million people volunteer time for sport each year – the largest volunteer group in the country.⁷

Whether it is for the friendships, the fitness, the thrill of the competition or the pure love of the game, sport is important to Australians.

And sport is good for Australians. It makes us a healthier nation both physically and mentally. Sport reduces the incidence of chronic disease, including obesity-related illnesses, diabetes and cardio vascular disease.⁸ Physical inactivity is a well-known and growing problem in Australia, with over 13,000 deaths attributed to it annually and more than 45,000 new cases identified each year.⁹ Recent research estimates a financial benefit of \$434 million to the economy if physical inactivity could be reduced by 15 per cent by 2018.¹⁰

Sport also helps to build our confidence and self-esteem, and reduces our crime rates. It helps us to develop stronger communities, bridges cultural boundaries and improves our international relations. Sport improves our academic performance, our social lives and creates an environment where all are equal. Sport is an important economic driver in Australia, with a workforce of over 2.4 million people and generating more than \$12.8 billion in annual income.¹¹



OF ADULT AUSTRALIANS HAVE AN INTEREST IN AT LEAST **ONE** SPORT, AND **SIX** ON AVERAGE



SPORT HAS A WORKFORCE OF
2.3 MILLION VOLUNTEERS
AND **100,000 PAID WORKERS**



AND GENERATES MORE THAN
\$12.8 billion
IN ANNUAL INCOME

THE PURPOSE OF

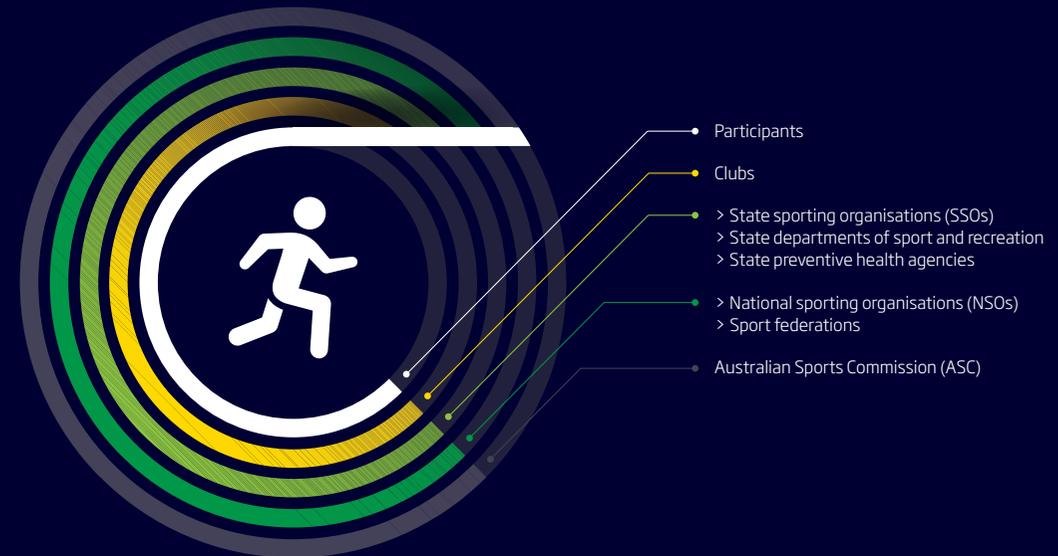
PLAY. SPORT. AUSTRALIA.

The ASC's task is to make Australian sport stronger – to get more people playing sport and to help athletes pursue their dreams. In 2012 we made a clear statement about our high performance plans through *Australia's Winning Edge*. We believe it is equally important to clearly explain our approach to growing sport participation in Australia – this is the purpose of *Play. Sport. Australia*.

As the Australian Government's key sports agency, the ASC is an important player in the sports sector, but we are by no means the only one. There are tens of thousands of sporting organisations across Australia and thousands of private-sector providers. Nonetheless, the ASC influences a large part of the sector and plays a national leadership role, so it is important to be clear about the areas we are focusing on and why.

Play. Sport. Australia. is our blueprint for how the ASC can best support national participation outcomes.

We recognise and acknowledge the great work being done at national, state, community and club levels, and we commend the private sector's innovation and activity. Our intent is to use our unique position to inform, support and create alignment through the sports sector to achieve the collective national goal of participation growth.





THE AUSTRALIAN SPORTS

COMMISSION'S AMBITIONS FOR

SPORTS PARTICIPATION

The ASC wants sports to be sufficiently agile to ensure what they offer is what Australians want, while at the same time staying true to what makes an individual sport unique and great. Sport is a consumer-driven industry, and a highly competitive one at that. The ASC currently recognises more than **90 different sports** in Australia, each vying for their share of participants – not to mention innumerable other leisure pursuits outside of sport.

Sports that fail to recognise or accept the changing landscape risk losing relevance and ground to other sports and leisure activities that are willing and able to adapt.

We want to see more sports thriving so it is easier for more Australians to choose and play the sports they love.

Our ambitions for sport are simple:



At the national level we want to see more Australians – particularly young Australians – participating in sport more often.



At the individual sport level we want the sports we invest in to achieve year-on-year membership and participation growth.



To achieve the above we want sports to be effective organisations – well-governed, strategic, embracing of commercial opportunities, adopting new technologies and delivering user-friendly sports opportunities that Australians want.



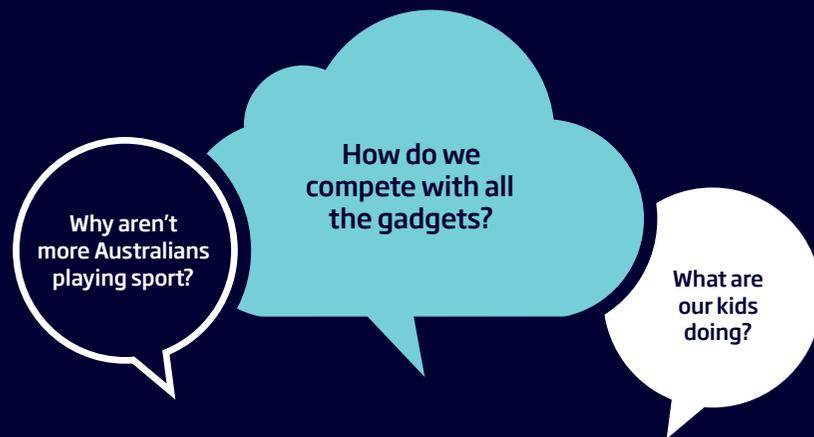
More relevant sporting products will help attract more people to sport and keep them playing sport. Our research is telling us sports need to develop or adapt their products to cater for the more socially oriented participant. These new products will be less about competition and more focused on playing for fun, flexible timing, fitness and with friends.

WHAT'S HAPPENING IN AUSTRALIAN

SPORTS PARTICIPATION?

Evolving preferences

Australia's sporting context is evolving and the ASC must be at the forefront of helping sports to succeed in a changing environment.



77%

OF CHILDREN SPEND THEIR SPARE TIME WATCHING TELEVISION



ONLY HALF ARE INVOLVED IN SPORT¹²

Research into the sports market tells us that Australians are **increasingly time-poor**, have **limited** budgets and are being **inundated by new forms of entertainment**.¹³ With these changes new preferences are emerging; Australians want greater flexibility, more tailored products and sport that works around them.

The ASC recently partnered with the CSIRO to identify trends in sport that are likely to affect the sector during the next 30 years. The study confirmed that people are increasingly:

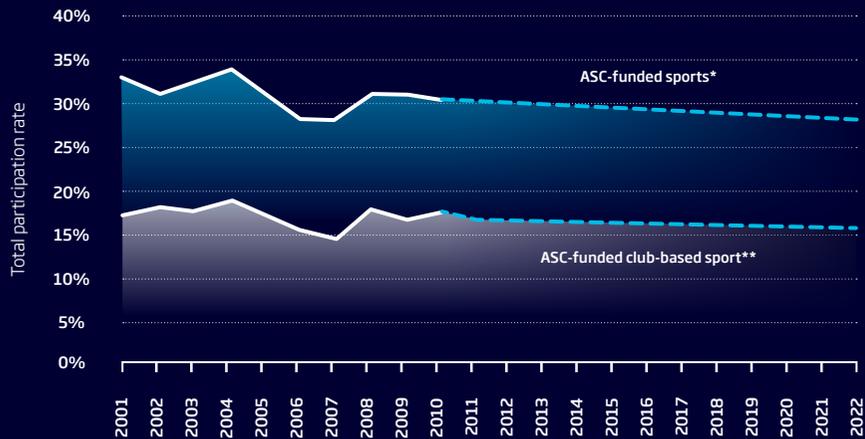
- > favouring more flexible, non-organised physical activity, such as running with headphones on
- > pursuing new lifestyle and adventure sports
- > developing new tastes as our population becomes more culturally diverse.

Similarly, the study revealed that commercial forces are placing sporting organisations under pressure to adopt more business-oriented structures.

The challenge for sport now is how to respond to these changes without eroding what makes sport unique and appealing.

The Australian Sports Commission has developed a toolkit that includes case studies from sports highlighting how they have dealt with these challenges. Visit ausport.gov.au for further information.

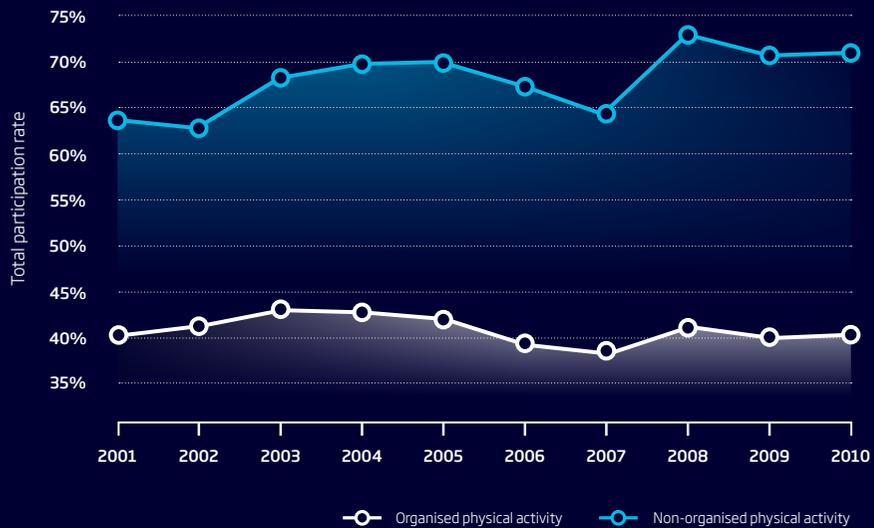
Table 1: Adult participation in sport — at least once per week trend and forecasts¹⁴



*ASC-funded sports refers to the 60+ sports the ASC invests in.

**Club-based sport refers to activities that were organised by a sport, recreation club or association that required payment of membership, fees or registration.

Table 2: Organised versus non-organised physical activity¹⁵



Participant refers to people who participated in at least one physical activity for exercise, recreation or sport at least once in the last 12 months.

Organised physical activity

Physical activity for exercise, recreation or sport that was organised in full or in part by (1) a fitness, leisure or indoor sports centre that required payment for participation, (2) a sport or recreation club or association that required payment of membership, fees or registration, (3) a workplace, (4) a school, or (5) any other type of organisation.

Non-organised physical activity

Physical activity for exercise, recreation or sport that was non-organised in full or in part (that is, not fully organised by a club, association or other type of organisation).



A healthy country?

There are some worrying health trends that are well-known and relevant to sport.

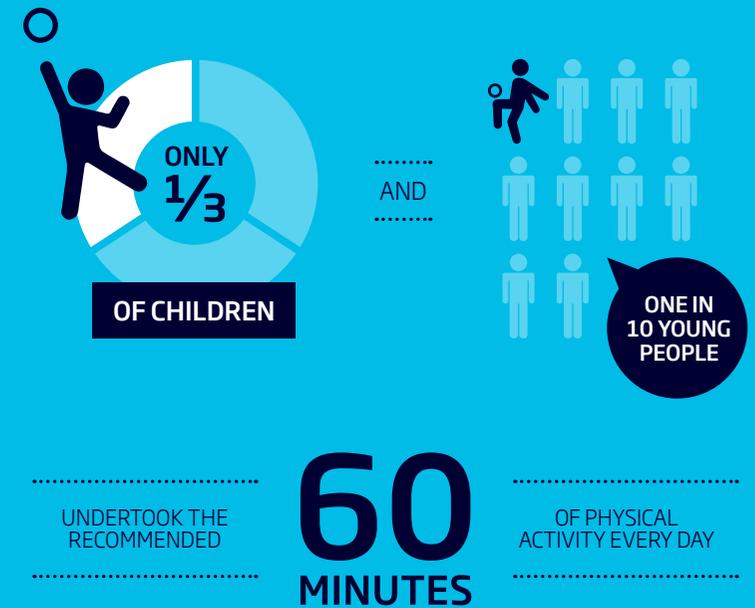
More Australian children are becoming overweight. Around one in four Australian children are overweight or obese.¹⁵ We cannot ignore this and assume kids will grow out of it. More unhealthy kids mean more unhealthy adults.

Just as concerning, Australia's kids are becoming less coordinated compared to earlier generations and their international peers.¹⁷ Fundamental movement skills (the ability to run, throw, catch, kick and jump) form the foundation for many of the specific motor skills required in popular sports and leisure activities throughout life. Sadly, our kids are not developing these skills and we see an urgent need to improve the physical literacy of school-aged children Australia-wide.

Another concern is that many kids are not staying in sport once they enter their teenage years, with a dramatic reduction in participation rates of organised and club-based sport between the ages of 13 and 20.¹⁸ Indeed, the Australian Bureau of Statistics' 2011-12 *National Health Survey* found that only one-third of children and one in 10 young people achieved the recommended levels of physical activity every day.

Adult Australians are also leading increasingly sedentary lifestyles. Almost 70 per cent are either sedentary or have low levels of physical activity.¹⁹

Recent analysis revealed 23 per cent of boys and 31 per cent of girls aged 12 had borderline or elevated insulin resistance. Twenty per cent of boys and 16 per cent of girls had elevated blood cholesterol levels. Both are high risk factors for cardio vascular disease and type 2 diabetes, and tend to track into adult life.²⁰



ALMOST 70% OF AUSTRALIAN ADULTS

(APPROXIMATELY 12 MILLION ADULTS)



ARE EITHER **SEDENTARY** OR HAVE **LOW LEVELS** OF PHYSICAL ACTIVITY

This does not bode well for our kids given the strong correlation between the activity levels of parents and their children.

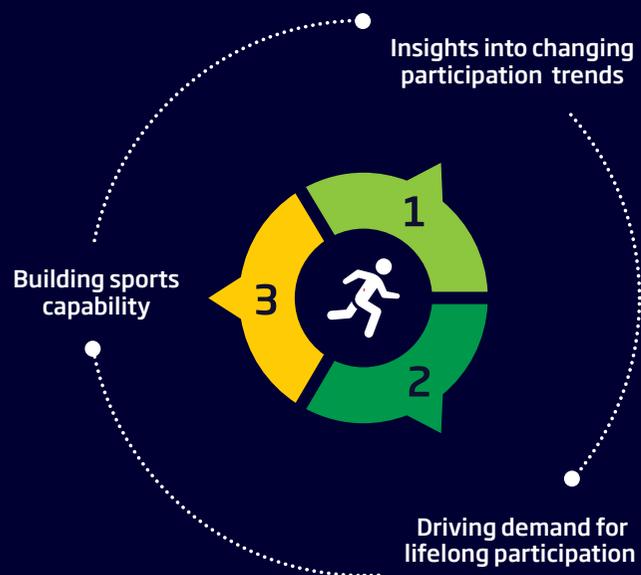


PRIORITY ACTION AREAS

FOR THE ASC

The ASC has pinpointed three key areas that need to be addressed for participation to increase and these are where we believe our resources and efforts are best focused. Progress will provide strong foundations for future success.

Put simply, we want to **better understand** what is happening in sport, help **drive demand** for lifelong participation in sport and **support the network that supplies** sport – our sporting organisations.





Better understand the environment by gaining and sharing deeper insights and measurement

For any sector or organisation to thrive, it needs high-quality information, research and data. This is an area where the ASC has and will continue to provide national leadership in a way that is accessible to all sports. It will be led by the ASC's Sport Insights branch, with a strong focus on the following priority actions:

- > **A new annual national participation survey** – to date, our sports participation data has been limited in its scope and usefulness. This has presented a significant challenge not only for us, but for the sports sector generally. It is very difficult to measure performance in participation without effective and consistent measurement.
The ASC will develop a new national participation survey to better understand participation trends in Australia, inform policy decisions and guide sports strategy with a strong evidence base. Information will be widely available to the sector to enable informed decision-making and investment accountability.
- > **Sport industry research** – we will maintain our investment in industry-leading research to inform the sector of emerging trends and to help sports to plan for the future. We have a proud tradition of producing world-class research. Our recent Market Segmentation for Sports Participation and The Future of Australian Sport studies have been widely acknowledged by the sector and we will continue to deliver an annual research programme accessible to sports.
Our industry research will be accompanied by applied learnings and case studies developed through our direct project work with sporting organisations.
- > **Clearinghouse for Sport** – we will maintain and enhance the role of the Clearinghouse for Sport, Australia's pre-eminent sport information and knowledge-sharing digital portal. The Clearinghouse connects Australian sportspeople to a world of ideas, experiences and knowledge. Since its launch in 2011 its membership has grown rapidly; we will continue to expand this network and ensure its content is contemporary and user-relevant.
- > **Brokers of knowledge** – the ASC will provide leadership for the Australian sports sector and actively promote the many benefits of sport. From our unique position in the sector, we will be proactive brokers of knowledge. Through face-to-face forums, digital tools (such as the Clearinghouse) and other media we will connect the industry to share insights and information to improve sport strategy and planning.
- > The ASC will conduct new **bi-annual national forums** for key sport executives to discuss contemporary issues and to enable information exchange. We will have a particular focus on cross-sport collaboration and the sharing of case studies from the ASC with other organisations and the private sector.



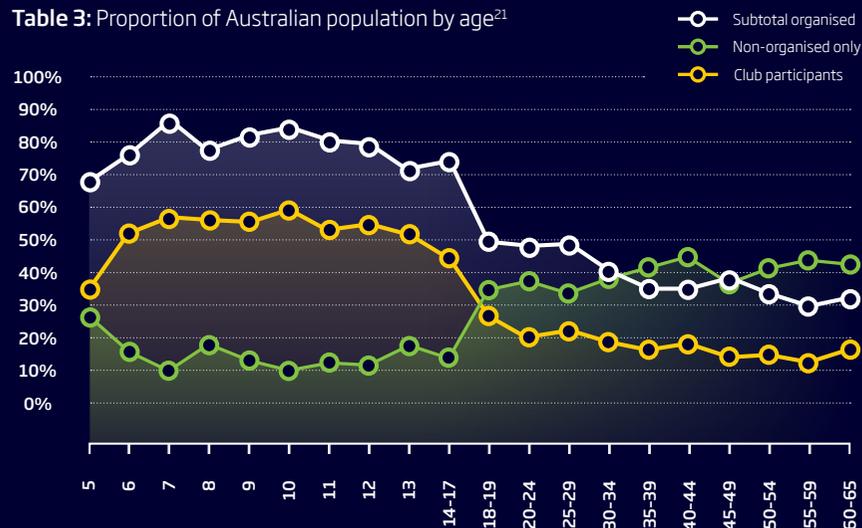
Focusing on younger Australians

Participating in sport develops skills and good habits that underpin lifelong physical fitness and research is telling us that young people who play or have played sport on a regular basis are more likely to lead a more active lifestyle as adults. The ASC's Sports Participation branch will focus on the following priority actions:

- > **Sporting Schools programme** – we will establish a world-class junior participation programme, Sporting Schools, which will focus on children aged five to 12 and youth aged 13 to 17. The programme will give more Australian children direct access to sport before, during and after school hours and take place in up to 70 per cent of primary schools across Australia. We will make sport available to all kids by providing funding to schools and sports as we partner with them to deliver attractive and relevant sporting experiences for the next generation of participants.
- > **Participation investment** – the ASC will continue to invest in national sporting organisations to increase participation in sport. A refined investment model will include a new sports categorisation approach and a transparent set of investment principles to clearly articulate ASC expectations. In doing so, the ASC will be investing in the system both from the top down through our national sporting organisations and the bottom up through our grassroots investment in the Sporting Schools programme.
- > **Participation strategy support** – the ASC will work closely with identified national sporting organisations to enhance their participation strategies. We will seek to align sports' strategies to maximise the benefits of the work being done by other key sector players, including state and territory departments of sport and recreation, sports federations and the school sport sectors.

Retention – we are concerned about the alarming dropout rates of our youth. We will address this directly as a key priority of our new national participation programme, Sporting Schools, which will be supported by research and applied learning.

Table 3: Proportion of Australian population by age²¹





Creating demand – the ASC sees the continued growth of kids' participation as fundamental to creating long-term demand for sport. We want Australian kids to develop physical literacy and affection for sport early, and we want to create effective connections between school communities and sporting clubs. Kids' participation also creates an important positive circle of influence within families.



Ultimately it is the sports themselves who will drive participation growth. The ASC recognises the leadership role our national sporting organisations play and will continue to help them to adapt to changes across the sports system.



Strengthening Australia's national sporting organisations

Australia's Winning Edge promotes the critical link between sports governance and business capability and the achievement of high performance success. This link is equally true for sport participation success. Improving governance, leadership and business systems in sporting organisations will be critical for Play. Sport. Australia. in achieving sustainable participation growth. The ASC's Sports Governance and Business Capability branch will lead this work with the following priority actions:

- > **Governance reform** – continuing to help sports to build their organisational capacity through leading effective governance reform and driving alignment through the national, state and territory levels.
- > **Product development and commercial sustainability** – applying our expertise and investment in targeted projects to help sports develop relevant products, and identifying commercial opportunities to be more financially sustainable.
- > **Workforce** – working with sports on developing their strategies to train and develop their workforces so that they have the quality and quantity of people needed to deliver sport to the community.
- > **Coaching and officiating** – we will work with NSOs to better understand their coaches and officials at all levels and to develop training, education and support programmes to meet their needs. This will include both 'traditional' accreditation and less formal, non-accredited support.
- > **Facilities and infrastructure** – encouraging sports to develop their own national facilities audits and plans to ensure growth regions are identified.
- > **Digital leadership** – supporting sports to develop digital leadership and capability to ensure they are connecting with their customers effectively and building their commercial potential and utilising technology to support growth and innovation.
- > **Play by the Rules** – continue to support and evolve the Play by the Rules resource to help the sector to ensure a safe, fair and inclusive environment in sport and recreation.
- > **National Board Register** – recent experience tells us there is strong demand for board positions on our national sporting organisations. We will enhance the existing Women's Board Register and develop a National Board Directors Register to help sports to locate and identify the best people for their boards.



People expect more to secure their hearts and minds. This makes the business of sport more complex. This is a big change for an industry that has been built largely by volunteers and small community-based groups. The ASC will continue to support sporting organisations through this important transition while recognising the ongoing critical role of volunteers and community connections to sport.

AUSTRALIA'S SPORTING JOURNEY

Play. Sport. Australia. sets out the compelling reasons why sport is important for Australians and in that context how the ASC will focus its efforts to get more Australians playing sport more regularly.

We have established a new structure within our Participation and Sustainable Sports division to align with this new approach. The Sport Insights branch will lead our research and knowledge sharing work; the Sports Participation branch will help sports to develop their participation strategies and deliver the Sporting Schools programme; and the Sports Governance and Business Capability branch will help sports to improve their organisational performance and business systems.

All sporting organisations and clubs, no matter their size or resources, contribute to the success and vitality of Australian sport. The ASC will work across the system in the years ahead to ensure sport remains relevant, grows and prospers.

Our sports will thrive. More Australians will participate.





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