

SPORTAUS

AUSPLAY



Fitness/Gym

State of Play Report

Driving Participation & Engagement

April 2019





About this Report

The State of Play Report has been designed to deliver a single sport snapshot, to help identify trends and opportunities to maximise participation and engagement.

AusPlay Data

The nationwide AusPlay survey has been running since October 2015, using Computer Assisted Telephone Interviewing (CATI).

The core aim of AusPlay data is to provide accurate and reliable information on trends in participation and physical activities among Australian residents, including Children Aged Under 15 and Adults 15+.

Annually, a total of about 20,000 interviews are conducted with Adults Aged 15+ and about 3,500 interviews with parents/guardians of Children Under 15.

AusPlay is carried out in compliance with ISO 20252 and membership requirements for the Association of Market and Social Research Organisations (AMSRO) and the Australian Market and Social Research Society (AMSRS).

Data within this report

This report contains data collected from January 2016 to December 2018.

Data within this report has been prepared by Sport Australia and may vary from other published AusPlay data due to differences in definitions and/or data classifications.

Fitness/Gym: State of Play Report

Key Take Outs



Overall Participation

The annual population estimate for Adults 15+ participating in Fitness/Gym activities was 6,791,968 (or 33.8% of the Adult 15+ population).

Fitness/gym activities appealed to both men and women, although Adult participation was slightly skewed towards females (3,842,116 or 37.8% of the female population), with females accounting for 57% of participation.

Participation in Fitness/Gym was significantly higher in major cities (36%) compared to regional (28%) and especially remote (23%) areas.

A high proportion of Adult 15+ Fitness/Gym participation was organised or venue-based (82%).

The peak participation rates for organised Fitness/Gym were observed at young adulthood between the ages of 18-34 (38%-39%). Participation commenced at 15-17 years with a strong 21% participation rate in organised Fitness/Gym activities for this age group. Although participation declined with age after 34 years, Adult participation remained strong even among older Australians 65+ (19%).

Frequency & Duration

Adults 15+ who participated in Fitness/Gym had a median frequency of 156 sessions per

annum (about three times per week) and the median session duration was 60 minutes.

AusPlay estimates that Fitness/Gym activities represented a 17.2% share of all active time (all sports and physical activities combined).

Spend

A total of more than \$3 billion per annum was spent on Adult 15+ Fitness/Gym participation fees. Median annual spend was \$520 per Adult participant.

Motivations for Participation (Adults 15+)

The dominant motivation to participate in Fitness/Gym was 'Physical health/fitness' (85%). 'To lose weight/keep weight off/tone' (24%) was the other main motivator.

Reasons For Dropping Out of Participation

The dominant reason for dropping out of Fitness/Gym participation was 'Not enough time/too many other commitments' (23%), but many also 'Couldn't afford it/afford transport' (17%).

Growth & Opportunities

Net growth market opportunity is somewhat limited considering that so many Australians are already involved in the activity. Consideration among females is nearly double that of males.

Fitness/Gym (Adults 15+)

Snapshot



AusPlay data, Adult and Fitness/Gym Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Fitness/Gym Participants 15+ n=19,506



Information on this page provides a snapshot of the Adult 15+ population, at total national level and by gender.

Participation figures are shown as total volume among the Adult 15+ population and the % who have participated.

This provides a read on participation levels, along with the market size when it comes to sports wear and apparel.

Engagement & Participation	Total	Male	Female
Is Most Strongly Associated Sport/Activity(%)	5.5%	3.8%	7.2%
Is Most Strongly Associated Sport/Activity(People)	1,116,645	381,165	735,479
Participation (%)	33.8%	29.7%	37.8%
Participation (People)	6,791,968	2,949,851	3,842,116
Average Frequency Per Annum	146	156	138

Conversion to Organised & Club	Total	Male	Female
Participation (People)	6,791,968	2,949,851	3,842,116
Organised Participation (People)	5,569,657	2,362,836	3,206,822
Conversion to organised (%)	82%	80%	83%
Club Participation (People)	47,627	14,844	32,782
Conversion to club – from Overall Participation (%)	0.9%	0.6%	1.0%
Conversion to club – from Organised Participation (%)	0.7%	0.5%	0.9%

Fitness/Gym (Adults 15+)

Snapshot by State



AusPlay data, Adult and Fitness/Gym Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Fitness/Gym Participants 15+ n=19,506



Information on this page provides a snapshot of the Adult 15+ population, at total national level and by state.

Participation figures are shown as total volume among the Adult 15+ population in each state and the % who have participated.

This provides a snapshot to help identify state level strengths and weaknesses.

Engagement & Participation	Total	NSW	VIC	QLD	SA
Is Most Strongly Associated Sport/Activity(%)	5.5%	5.5%	5.7%	5.7%	5.4%
Is Most Strongly Associated Sport/Activity(People)	1,116,645	346,785	284,336	231,746	77,076
Participation (%)	33.8%	34.2%	34.5%	32.9%	31.7%
Participation (People)	6,791,968	2,171,107	1,730,344	1,334,631	454,827
Average Frequency Per Annum	146	145	139	152	150

Conversion to Organised & Club	Total	NSW	VIC	QLD	SA
Participation (People)	6,791,968	2,171,107	1,730,344	1,334,631	454,827
Organised Participation (People)	5,569,657	1,803,499	1,443,118	1,056,834	357,488
Conversion to organised (%)	82.0%	83.1%	83.4%	79.2%	78.6%
Club Participation (People)	47,627	15,476	10,679	10,856	2,060
Conversion to club – from Overall Participation (%)	0.7%	0.7%	0.6%	0.8%	0.5%
Conversion to club – from Organised Participation (%)	0.9%	0.9%	0.7%	1.0%	0.6%

Fitness/Gym (Adults 15+)

Snapshot by State



AusPlay data, Adult and Fitness/Gym Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Fitness/Gym Participants 15+ n=19,506



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Participation figures are shown as total volume among the Adult 15+ population in each state and the % who have participated.

This provides a snapshot to help identify state level strengths and weaknesses.

Engagement & Participation	Total	WA	ACT	NT	TAS
Is Most Strongly Associated Sport/Activity(%)	5.5%	5.7%	5.1%	7.0%	3.7%
Is Most Strongly Associated Sport/Activity(People)	1,116,645	129,834	17,064	14,048	15,757
Participation (%)	33.8%	34.2%	38.4%	33.4%	28.1%
Participation (People)	6,791,968	784,265	129,282	66,865	120,646
Average Frequency Per Annum	146	144	145	160	152

Conversion to Organised & Club	Total	WA	ACT	NT	TAS
Participation (People)	6,791,968	784,265	129,282	66,865	120,646
Organised Participation (People)	5,569,657	647,935	110,881	55,814	94,089
Conversion to organised (%)	82.0%	82.6%	85.8%	83.5%	78.0%
Club Participation (People)	47,627	7,286	766	22	482
Conversion to club – from Overall Participation (%)	0.7%	0.9%	0.6%	0.0%	0.4%
Conversion to club – from Organised Participation (%)	0.9%	1.1%	0.7%	0.0%	0.5%

Fitness/Gym (Adults 15+)

Trends

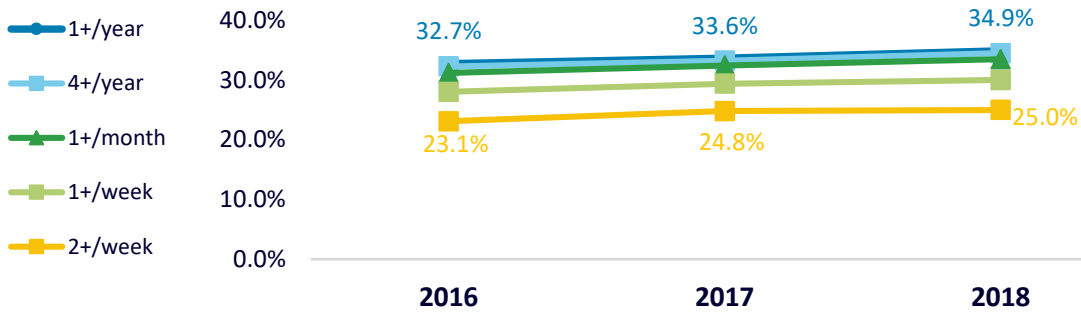


Information on this page provides overall participation and organised participation trends among the Adult 15+ population.

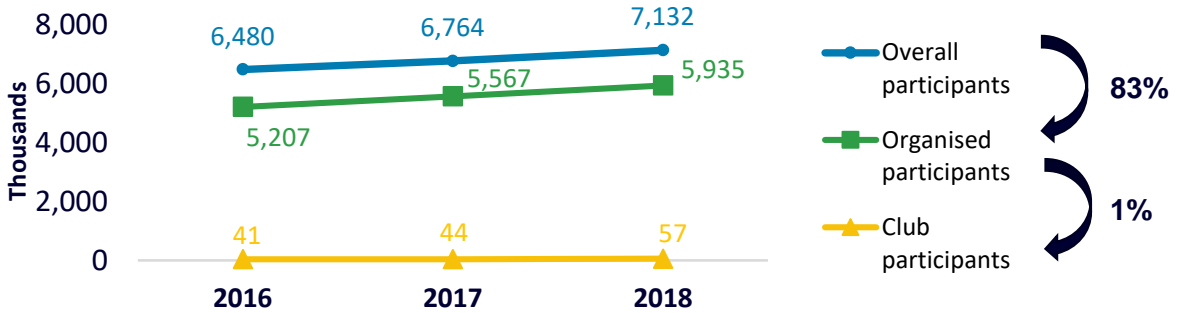
As more data becomes available in subsequent report releases, time series data will be expanded.

This provides a read on participation trends to identify if a sport/activity is gaining or contracting when it comes to participation metrics.

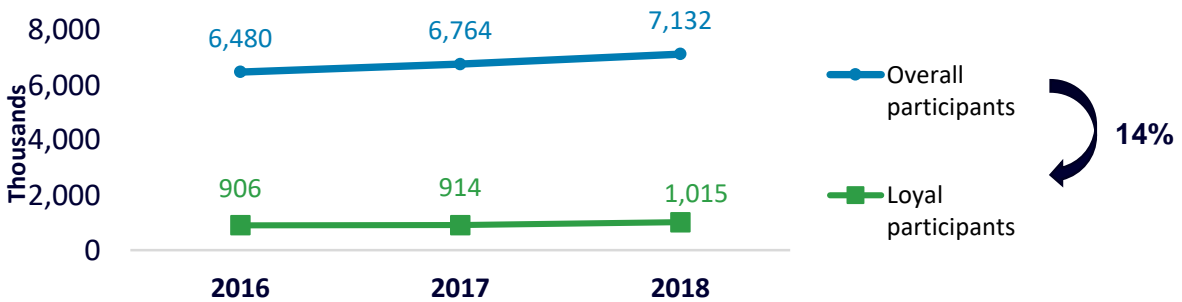
Participation Trends



Conversion to Organised - Evolution



Loyalty among Participants - Trend



Fitness/Gym Participation by Life Stage



AusPlay data, Adult and Fitness/Gym Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Fitness/Gym Participants 15+ n=19,506

AusPlay data, Children and Fitness/Gym Participant Population 0-14: January 2016 to December 2018 Children 0-14 n=10,285; Fitness/Gym Participants 0-14 n=189

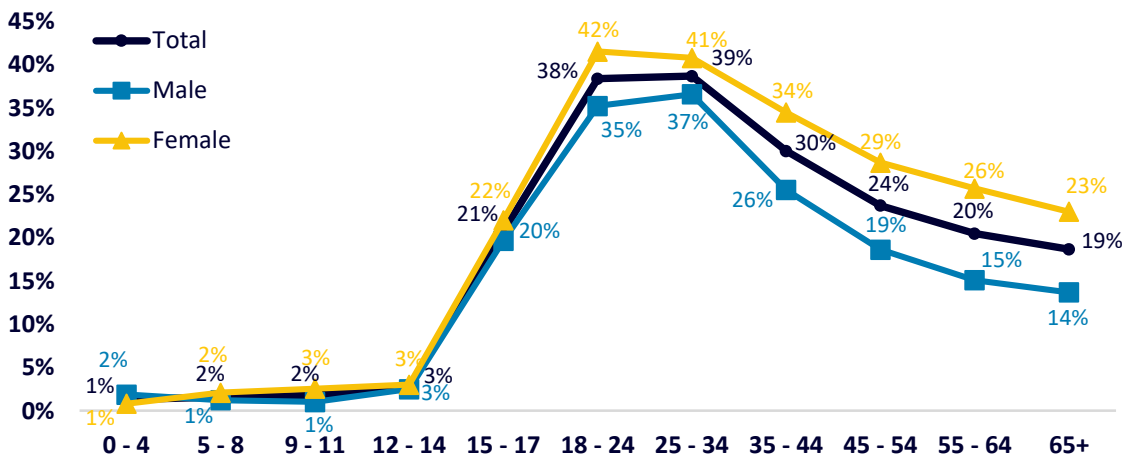


Information on this page provides a snapshot of participation at national level, by age and by gender.

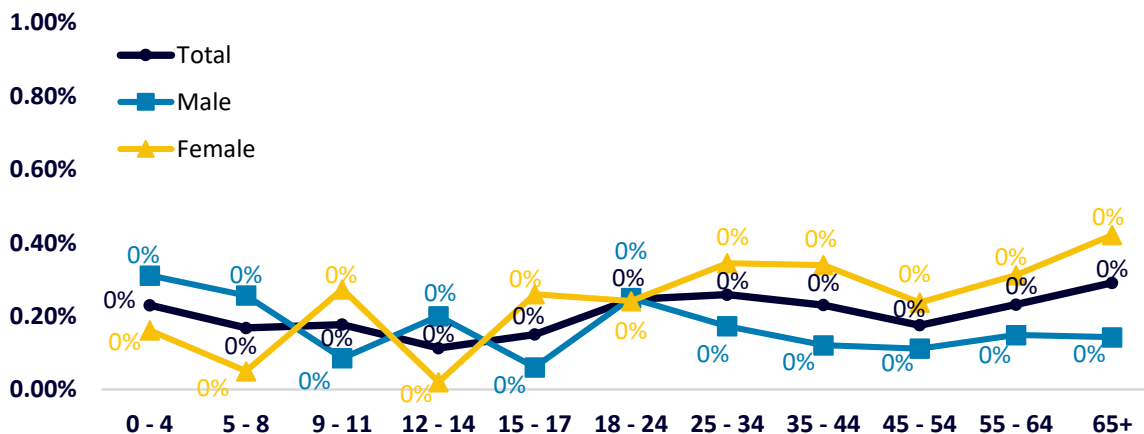
Figures are shown as the % of each age who have participated.

This provides a read of peak participation rates by age, to help identify opportunities to develop targeted initiatives aimed at boosting participation among specific age and gender groups.

Participation by Life Stage - Organised



Participation by Life Stage - Club



Fitness/Gym

State of Play Report

Adults 15+



Fitness/Gym (Adults 15+) Participation Levels



AusPlay data, Adult and Fitness/Gym Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Fitness/Gym Participants 15+ n=19,506

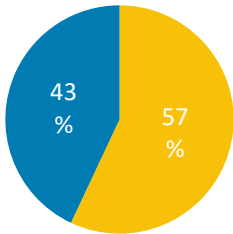


Information on this page provides a snapshot of the Adult 15+ population, at total national level and by gender.

Gender split shows the contribution each gender makes when it comes to total participation. Participation levels are shown as total volume among the Adult 15+ population and the % who have participated.

This provides a snapshot to help identify the age and gender groups that are driving current participation volume, whilst also helping to identify potential growth opportunities.

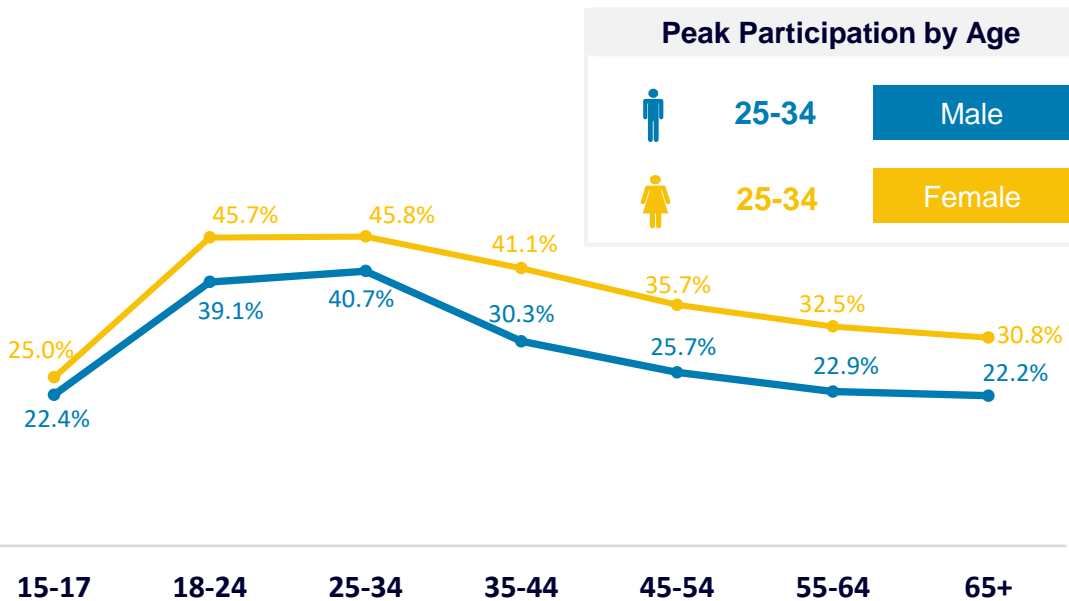
Gender Split



Participation Levels

	Total Participation	Male Participation	Female Participation
%	33.8%	29.7%	37.8%
000's	6,792.0	2,949.9	3,842.1

Participation Levels by Age and Gender



Fitness/Gym (Adults 15+)

Participation by Location



AusPlay data, Adult Population 15+: January 2016 to December 2018 Adult 15+ n=61,579



Information on this page provides a snapshot of the Adult 15+ population, based on state and geography.

Participation levels are shown as total volume among the Adult 15+ population and the % who have participated.

This provides a snapshot to help identify state level participation, as well as differences across metro, regional and remote areas.

Participation Levels by State



	Total National Participation	Major Cities	Inner & Outer Regional	Remote & Very Remote
%	33.8%	36.3%	28.1%	23.4%
000's	6,792.0	5,080.6	1,438.3	71.0

Fitness/Gym (Adults 15+)

Player Profile



AusPlay data, Adult and Fitness/Gym Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Fitness/Gym Participants 15+ n=19,506



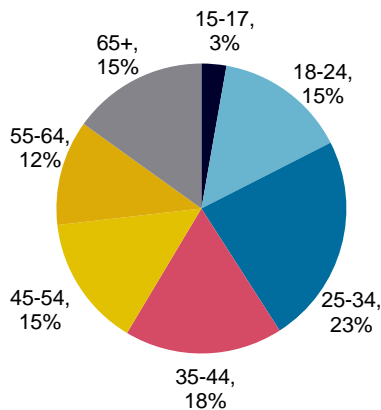
Information on this page provides a snapshot of the Adult 15+ population, based on age and gender, as well as LOTE, People with Disability and Indigenous.

Share of Play by Gender and Age shows the contribution of each group when it comes to overall participation.

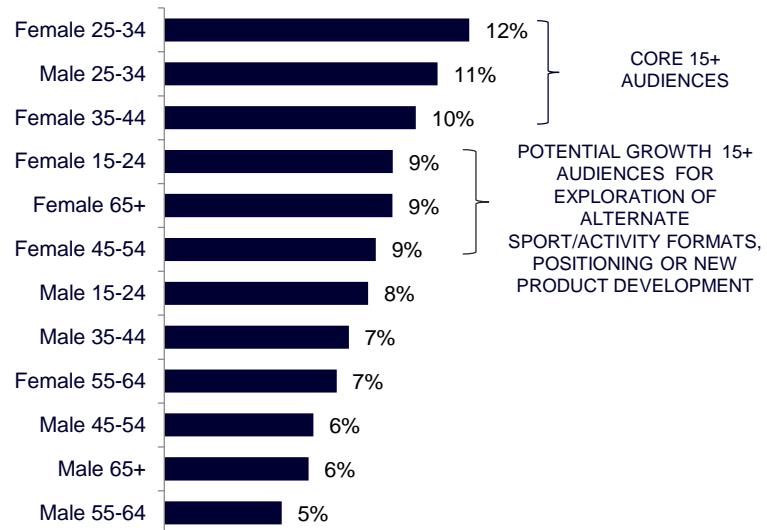
This helps identify the specific age and gender groups that are having the greatest impact on overall participation levels, whilst also highlighting growth opportunities when it comes to sport/activity formats that extend beyond traditional demographic audience needs.

Player Profile by Gender and Age

Age Split



Share of Play by Gender & Age



Participation Levels by Population Group

	Total National Participation	LOTE (Speak language other than English at home)	People with Disability	Indigenous
%	33.8%	36.0%	27.1%	30.3%
000's	6,792.0	1,231.2	828.2	130.4

Fitness/Gym (Adults 15+)

Frequency & Duration



AusPlay data, Adult and Fitness/Gym Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Fitness/Gym Participants 15+ n=19,506

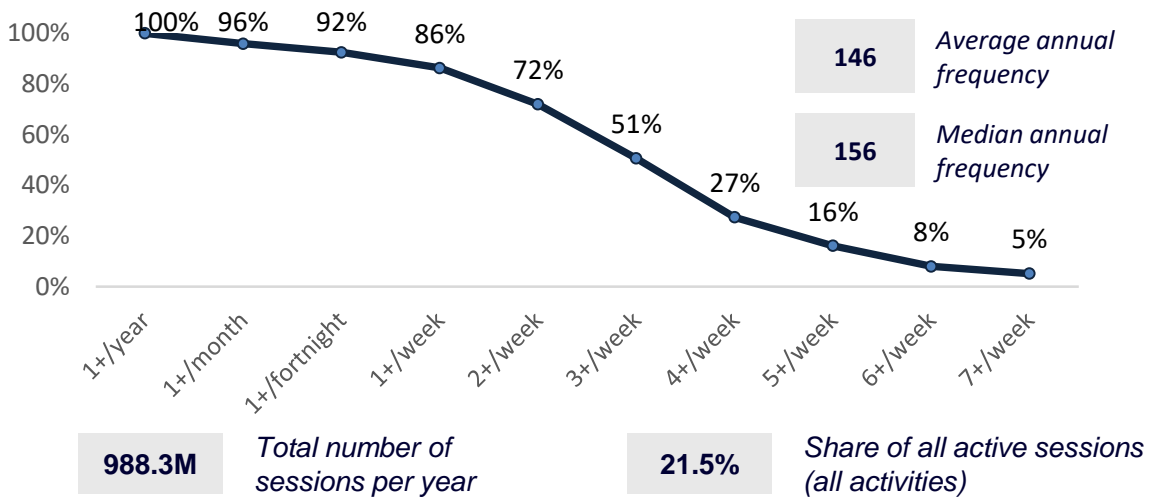


Information on this page provides a snapshot of the Adult 15+ Participant Population, in terms of frequency and duration of participation.

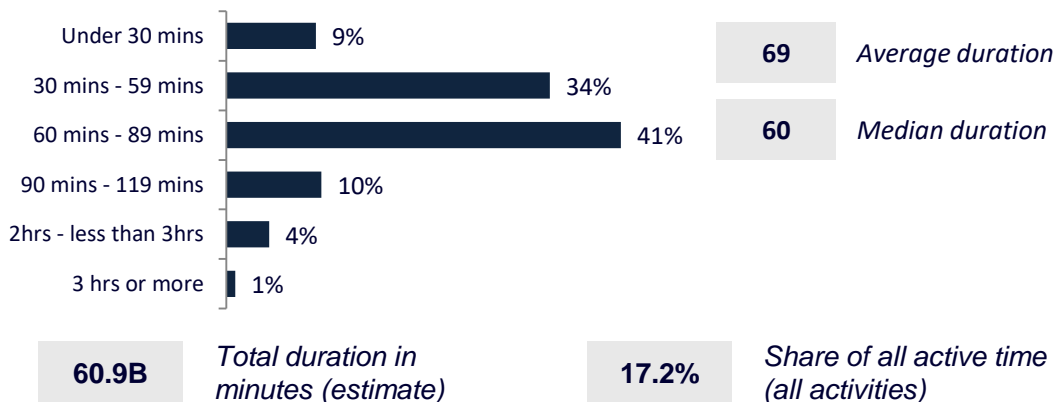
Frequency of participation provides a read on how often participation occurs. Duration provides a read of how long is spent each time participation takes place.

This helps identify opportunities among the Participant Population, in terms of initiatives aimed at boosting the total number of sessions per year by increasing frequency of participation.

Participation Levels by Age and Gender



Participation Levels by Age and Gender



Fitness/Gym (Adults 15+) Participation



AusPlay data, Adult and Fitness/Gym Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Fitness/Gym Participants 15+ n=19,506

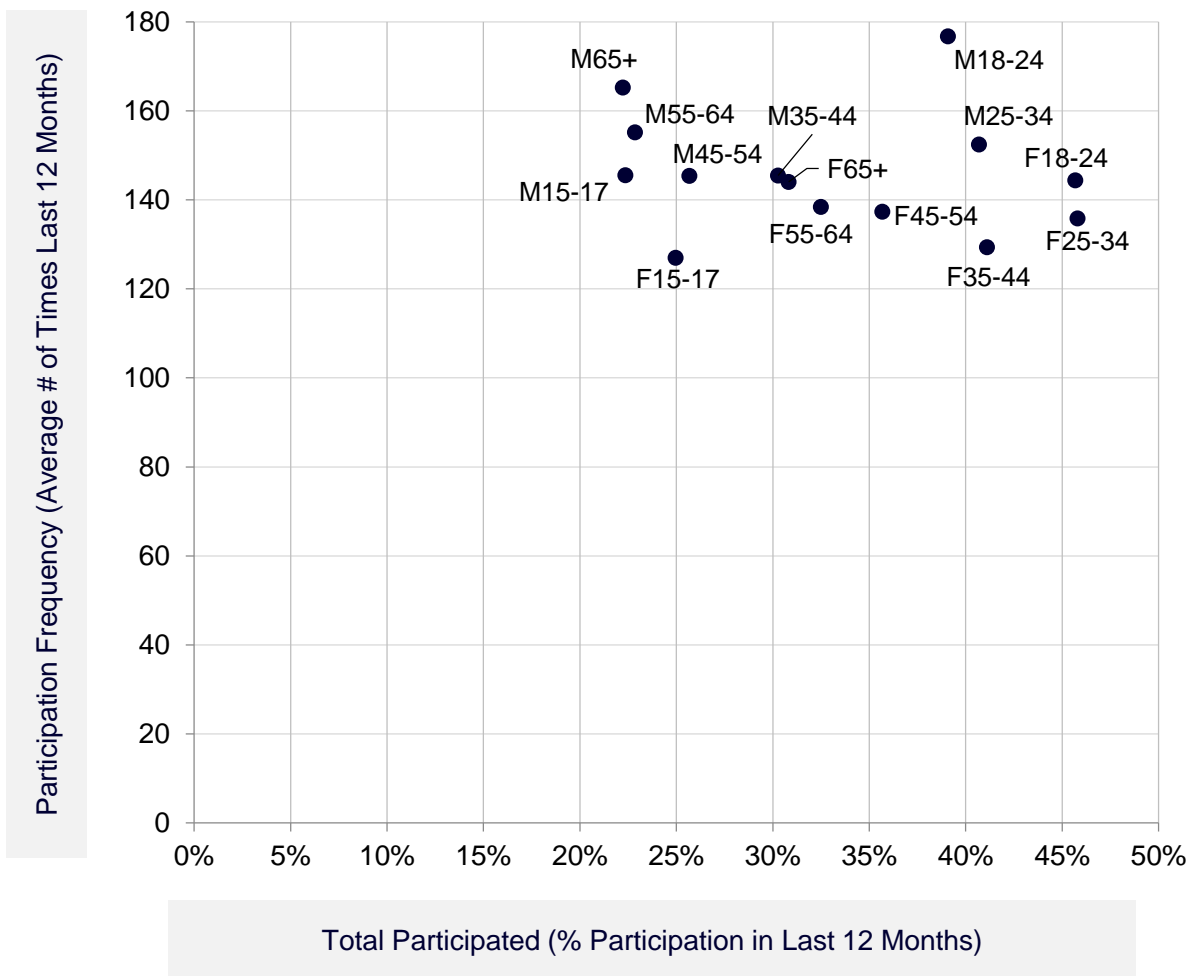


Information on this page provides a snapshot of the Adult 15+ Population in terms of participation and number of times participated in the last 12 months.

Figures are shown by age and gender groups, with those in the top right section being the most active on both measures.

This illustrates the participation profile across different age and gender groups, to identify key opportunities at age and gender level.

Participation & Frequency by Age



Fitness/Gym (Adults 15+)

Current Market Position



AusPlay data, Adult Population 15+: January 2016 to December 2018 Adult 15+ n=61,579

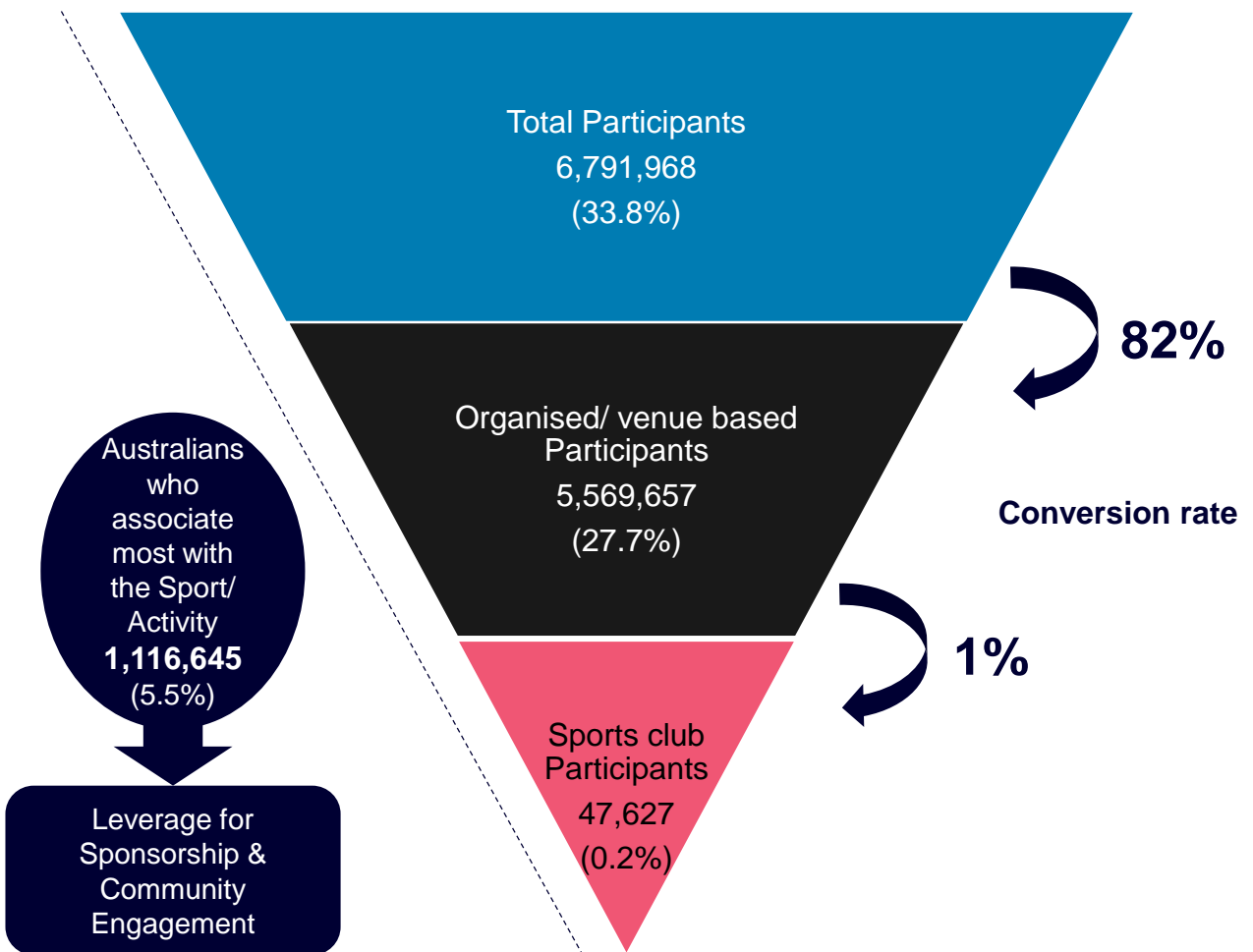


Information on this page provides a snapshot of the Adult 15+ Population, in terms of total participation, organised/venue based participation and sports club participation.

Conversion figures show the conversion from one level to the next.

This highlights opportunities to build on the total participation base to drive increased organised/venue based participation and sports club participation.

Fitness/Gym Association & Participation Levels



Fitness/Gym (Adults 15+) Engagement



AusPlay data, Adult and Fitness/Gym Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Fitness/Gym Participants 15+ n=19,506

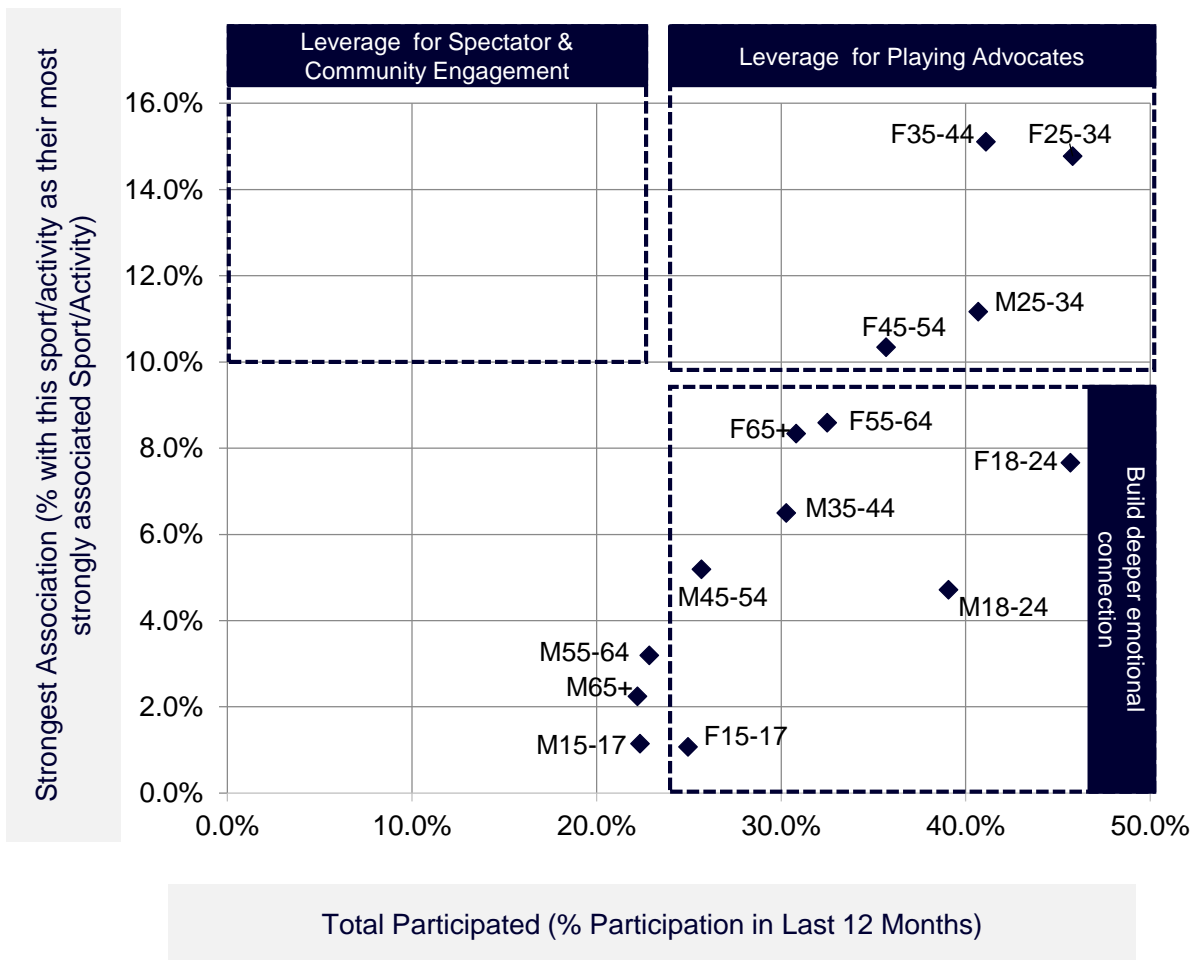


Information on this page provides a snapshot of the Adult 15+ Population in terms of participation and the % of the Adult 15+ Population who have nominated this as the sport/activity they most strongly associate with.

Figures are shown by age and gender groups, with those in the top right section being the most active on both measures.

This highlights opportunities to leverage demographic groups that have a strong association with a sport/activity and those who participate.

Participation & Association by Age



Fitness/Gym (Adults 15+)

Spend Profile



AusPlay data, Fitness/Gym Participant 15+: January 2016 to December 2018 n=19,506

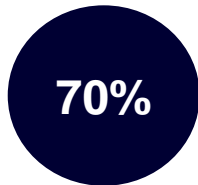


Information on this page provides a snapshot of the Adult 15+ Population, in terms of paid participation.

Figures shown are based on annual spend.

Median and average annual spend figures illustrate the incremental annual uplift in expenditure on participation that can be attributed to each additional person who pays to participate in this sport/activity.

Fitness/Gym Overall Spend Levels



of participants
paid to
participate

	All	Club
Median annual spend	\$520	\$364
Average annual spend	\$682	\$591
Share of total spend (Share of all activities participated in)	35.0%	0.8%



Total expenditure on all participation

\$3,004,679,407



Total expenditure on **club** participation

\$23,112,186

Participation Spend by Gender	Total	Male	Female
Paid to Participate (%)	69.7%	64.8%	73.5%
Paid to Participate (People)	4,734,033	1,910,782	2,823,251
Average annual spend per participant	\$682	\$627	\$719
Total national annual spend	\$3,004.7M	\$1,121.7M	\$1,883.0M

Fitness/Gym (Adults 15+) Market Outlook & Opportunity



AusPlay data, Adult Population 15+: January 2016 to December 2018 Adult 15+ n=61,579

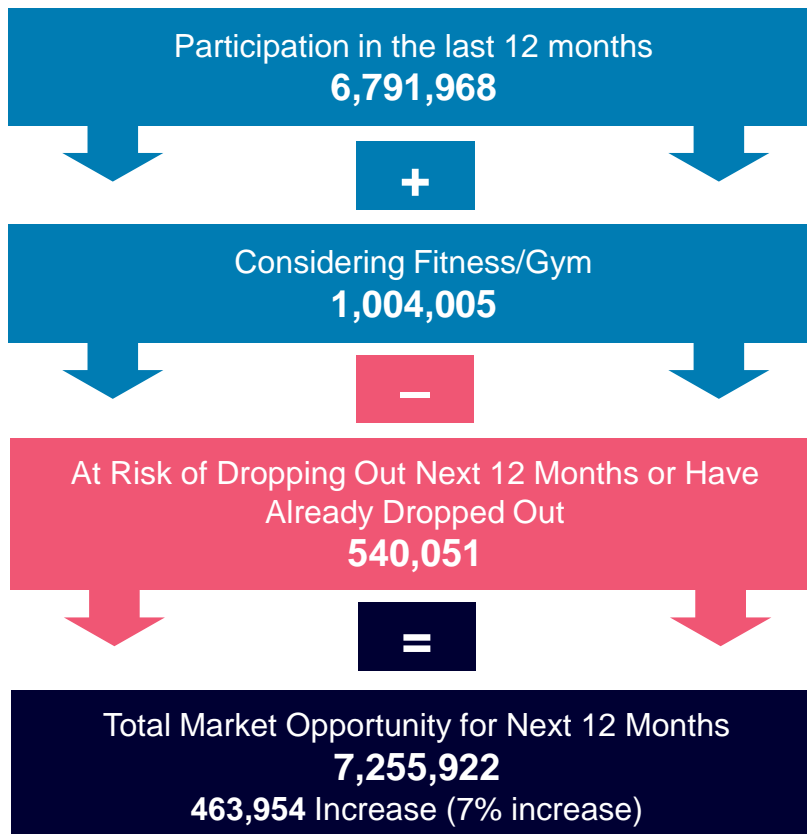


Information on this page provides a snapshot of the Adult 15+ Population in terms of market opportunity.

Figures shown represent volume of Adults 15+.

The gap between those considering this sport/activity and those at risk of dropping out/ have already dropped out represents the net increase in total market opportunity.

Fitness/Gym Market Opportunity



Fitness/Gym (Adults 15+) Market Outlook & Opportunity



AusPlay data, Adult Population 15+: January 2016 to December 2018 Adult 15+ n=61,579



Information on this page provides a snapshot of the Adult 15+ Population by gender and age in terms of market opportunity.

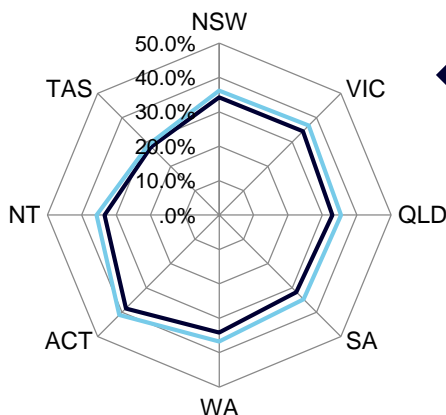
Figures shown represent the volume of people and %'s.

This highlights the strongest opportunities by gender and age, with the gap between those considering this sport/activity and those at risk of dropping out/ have already dropped out representing the net increase in market opportunity among each group.

Fitness/Gym Market Opportunity by Gender & Age

	TOTAL	♂	♀	15-24	25-44	45-64	65+
Participants – last 12 months (%)	33.8%	29.7%	37.8%	37.6%	39.6%	29.3%	26.8%
Participants – last 12 months (People)	6,791,968	2,949,851	3,842,116	1,188,706	2,789,689	1,789,038	1,024,534
Considering Next 12 Months (%)	5.0%	3.7%	6.3%	4.1%	5.7%	5.3%	4.0%
Considering Next 12 Months (People)	1,004,005	364,565	639,440	130,536	398,363	323,166	151,939
At Risk of Dropping Out or Have Already Dropped Out (%)	8.0%	5.4%	9.9%	8.7%	9.1%	7.2%	5.3%
At Risk of Dropping Out or Have Already Dropped Out (People)	540,051	158,796	381,255	103,340	254,728	128,135	53,848
Net Gain/ Loss (People)	463,954	205,769	258,185	27,196	143,635	195,032	98,091
Projected (People)	7,255,922	3,155,621	4,100,301	1,215,902	2,933,324	1,984,069	1,122,626

Fitness/Gym Market Opportunity by State



— Current Participation
— Projected Participation

This shows market opportunity by state, on a per capita basis.

Fitness/Gym (Adults 15+)

Motivations for Participation



AusPlay data, Fitness/Gym Participant 15+: January 2016 to December 2018 n=19,506



Information on this page provides a snapshot of the Adult 15+ Population as well as by gender and age in terms of motivations to participate.

Adult 15+ motivations are shown to the left and gender and age specific motivations are shown to the right.

This highlights the dominant overall motivations as well as similarities and differences at age and gender level. When designing strategies, products or messaging to engage with specific demographic groups, these should be built around the core motivations of that audience.

Top 10 Motivations to Participate*

Adults 15+



By Gender

	1st	2nd	3rd
Male	Physical health/fitness	To lose weight/keep weight off/tone	Psychological/mental health/therapy
Female	Physical health/fitness	To lose weight/keep weight off/tone	Psychological/mental health/therapy

By Age

	1st	2nd	3rd
15-17	Physical health/fitness	To lose weight/keep weight off/tone	Fun/enjoyment
18-24	Physical health/fitness	To lose weight/keep weight off/tone	Fun/enjoyment
25-34	Physical health/fitness	To lose weight/keep weight off/tone	Psychological/mental health/therapy
35-44	Physical health/fitness	To lose weight/keep weight off/tone	Psychological/mental health/therapy
45-54	Physical health/fitness	To lose weight/keep weight off/tone	Psychological/mental health/therapy
55-64	Physical health/fitness	To lose weight/keep weight off/tone	Physio/rehab/physical therapy/post op
65+	Physical health/fitness	Physio/rehab/physical therapy/post op	To lose weight/keep weight off/tone

* Multiple response question

Fitness/Gym (Adults 15+)

Top 10 Reasons for Drop Out or Consideration



AusPlay data, Adult Fitness/Gym Participants 15+, that are dropping out of participation in the next 12 months: January 2016 to December 2018 n=1,394; Adult Population 15+: n=61,579;

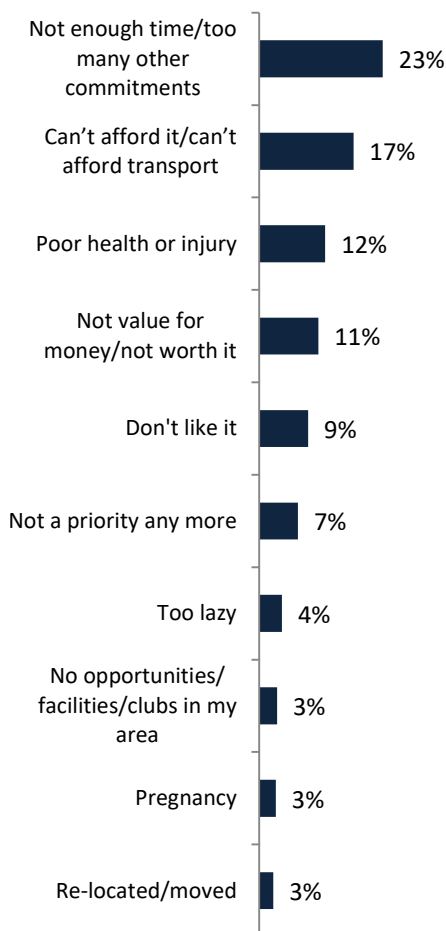


Information on this page provides a snapshot the top 10 reasons for dropping out as well as the top 10 reasons for considering this sport/activity.

Responses are multiple response, meaning more than one reason can be given.

Identifying reasons for dropping out can play a role in identifying opportunities for innovations in product portfolio or alternate sport/activity formats. Identifying reasons for consideration can play a role in optimising messaging, communications and advertising.

Top 10 Reasons for Drop Out



Top 10 Reasons for Consideration



* Multiple response question



Where to from here?







More information about AusPlay, including the methodology summary, survey questions, key terms and definitions, national tables etc., can be accessed via Sport Australia's Sport Market Insights on the Clearinghouse for Sport website (with direct access through researchinsport.com.au). Please use your Clearinghouse for Sport login for full access.

Any further questions about AusPlay (or queries for additional customised reporting/further analysis of the dataset) can be directed to Sport Australia via: AusPlay@sportaus.gov.au.



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Australian Sports Commission

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