



Australian Government
Australian Sport Commission

Market Segmentation Pilots

CASE STUDY 2 - WANDERGAMES

MARKET SEGMENTATION FOR SPORT PARTICIPATION



INTRODUCTION

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

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

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

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

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

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

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

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



Further information about the market segmentation research is available at –

https://secure.ausport.gov.au/clearinghouse/research/national_sport_research/market_segmentation_-_adults

https://secure.ausport.gov.au/clearinghouse/research/national_sport_research/market_segmentation_-_children

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



Case Study 2 – ‘WANDERGAMES’ WITH WEST SYDNEY WANDERERS

BACKGROUND

The West Sydney Wanderers (WSW) is a football club that plays in the national domestic competition, the A-League. The club has an extensive community engagement program which has contributed to garnering a large supporter base. The club works closely with local football organisations including the Blacktown District Soccer Football Association.

In late 2013, WSW conducted a modified (seven or nine a-side) non-competitive weekly football program called ‘Wandergames’, which targeted upper-primary aged children (9-12 years) that had stopped playing football or still played but just wanted to play for fun and enjoyment (i.e. weren’t looking to pursue an elite development pathway). The first group of children is aligned to the segment called ‘Ponderers’ in the ASC’s Market Segmentation research whilst the latter are ‘Apathetic Clubbers’.

APPROACH

The nature of the Wandergames program aligned with Football Federation Australia’s concept of non-traditional, summer football played in a variety of ways but collectively called “Social Football”. Rules for this form of football are modified in several ways including number of players per team (including mixed gender), game duration and field size. Social Football has been identified by FFA and its affiliates as a significant growth area for the game. It particularly caters for people that want to play football in a less competitive way and with more flexible scheduling, consistent with recent research.

As one of the coaches in the Wandergames program highlighted:

- “...there is a really big drop off (in children playing football) when it goes to 11v11, when it gets more serious, more competitive and they are playing for competition points.”; and,
- “Our approach in this program is different from normal coaching, it’s much less technical. More about general advice and encouragement and just letting them play.”

MARKET SEGMENTS – PONDERERS & APATHETIC CLUBBERS

In order to target the Apathetic Clubber and Ponderer segments, the marketing and communication approach was quite specific in detailing how the program would be conducted. Emails to prospective participants (identified in partnership with the Blacktown soccer association, using their data base), stated that the Wandergames program:

- “...Is aimed at players who do not like playing under high competition but just want to get out there and have fun.
 - There is no competition table.
 - The referees help players understand the game as it is played.
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- A coach coaches both teams and not just one so it is all about developing and enjoying and not combative....”

RESULTS

The Wandergames program attracted 57 participants. The overarching satisfaction ratings with the program were very high with over 93% agreeing they had a lot of fun participating. The key features of “sport being offered in different ways” and the focus on fun and participation rather than competition and performance was, generally, very popular and featured strongly in the feedback. Some of the quotes from the participants included;

- “...The program was a different more attractive way of playing the sport.”
- “...I also enjoyed the fact that the program was run in a relaxed type of way without getting too much into the technical side of things...”
- “...It gave her a new love for the game.”
- “....He just wants to play with his friends. By doing this course he can.”

In terms of targeting the Ponderers and Apathetic Clubbers segments, the program coordinators were initially quite stringent about trying to attract children that were less competent footballers (e.g. actively discouraging current players at division one level) and targeting children that wanted to play for fun and social participation without overt competitiveness (consistent with the Ponderer and Apathetic Clubber segments).

The market segmentation identified that the key messages in communications for Ponderers needed to be about:

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

At the start, the take-up rate was slow so the club softened its approach slightly leading to a large influx of children that were highly engaged with football and love being part of a team and enjoy all facets of playing, from the physical and mental to the social and competitive.

This group characterises the market segmentation research identifies as the ‘Social Loyalists’. Unlike the Apathetic Clubbers and Ponderers, this segment is highly motivated and is strongly inclined to performance improvement. They enjoyed the program overall but its content wasn’t quite as challenging as they would have liked and they didn’t receive as much skill development as they expected. To illustrate the different expectations of the Social Loyalists segment, the following quote from one of the parents of some participants highlights their children’s performance focus and desire to be pushed;

- “They are passionate about football and will take every opportunity to play and learn. It would have been beneficial to have grading and allow higher skilled coaching....”

This situation demonstrates what can happen if a program isn’t as targeted as it could have been with its marketing and recruitment. Despite being geared for segments such as the Ponderers, there



were aspects of the program that attracted the Social Loyalists who appreciated the opportunity but found the design of the program not quite as fulfilling as they had hoped. They liked the program but would have liked to have learned more and been “pushed”.

CATERING FOR BOTH ‘SOCIAL LOYALISTS’ & ‘PONDERERS’.

As this pilot demonstrated, different market segments have different motivations. The challenge for sport is to offer participation in ways that reconciles the needs of the groups that the pilot highlighted. In this program, it could be overcome by grouping according to ability and motivation (but also mindful of friendship groups), if sufficient numbers of players are recruited. This will allow for players to be matched on skill level while still having an opportunity for those of lesser skill in a manner that is inclusive and fun.

MORE FLEXIBLE SCHEDULING

The participation of Ponderers is also dependent on scheduling the activity at a time that suits them. Football for children is typically played on Saturdays whereas this program was run on weekday afternoons. The feedback from the participants was that over 90% said the after-school timeslot suited their needs.

FLEXIBLE INTERPRETATION OF RULES

The market segmentation research also raised that as the focus on competition increased as children got older (particularly as they moved through the 10-15 years age range), there was an increased focus on the “rules”; the rules of a game are applied ‘properly’ and there is a perception amongst a significant proportion of participants that there is a need to master them or not play anymore (which is a negative).

The Wandergames program was sensitive to this and how it may put off the ‘Ponderers’ segment. As one of the coaches said

“.....we encouraged the kids to express themselves by dribbling, doing tricks, taking shots, being not too structured and we didn’t focus on the rules; if a ball went out of play slightly and a player tried to keep it in, we played on. There was lots of calls of “play on”, with (infringements like) little hand balls etc”.

SUMMARY

In summary, there were a number of areas where West Sydney Wanderers used the research:

1. Identified an area within an existing product where there was an obvious gap in retention/ acquisition of a specific target group:
 - The loss of children from competitive club football because they didn’t feel good enough and / or they felt it was too competitive.
2. Matched characteristics of a potential segment for acquisition, with the general characteristics of the audience.



3. Developed an existing product further to appeal to the particular characteristics of the specific segment:

- The use of coaches as referees, to provide support and advice on the field during the game to least competent / confident participants.
- Playing games that focused on fun and not tracking results
- Being flexible with rule interpretations

This case study also demonstrated flexibility in the newly developed product, as the same basic product could be adapted to target different segments.



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

