

# SPORTAUS

## AUSPLAY



### Walking (Recreational) 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.

# Walking: State of Play Report

## Key Take Outs



### Overall Participation

The annual population estimate for Adults 15+ participating in recreational Walking (not including Race or Bush Walking) was 8,770,154 (or 43.6% of the Adult 15+ population).

Adult participation was skewed towards females (5,467,104 or 53.7% of the female population), with females accounting for 62% of participation.

Fewer Adults 15+ participated in Walking in the Northern Territory (37.1%) compared to other states.

Not surprisingly, most Walking was done casually with only 4% of all participation being organised.

Walking participation increased exponentially with age. Peak participation rates were observed between 55-64 years of age for women (70.7%) and 65+ for men (57.4%, up from 50.9% for 55-64 year olds).

### Frequency & Duration

Adults 15+ who participated in Walking had a median frequency of 156 sessions per annum (about three times per week) and the median session duration was 40 minutes.

### Sport Most Strongly Associated With (loyalty)

'Loyalty' to Walking was low compared to current participation, with 1.5+ million Adults 15+ who considered Walking the sport/physical activity they most strongly associate with. Most associate with another

sport/physical activity from when they were younger.

### Spend

Considering the high participation in Walking, but with very little of it organised, overall spend on Walking participation was low compared to other sports/physical activities.

AusPlay estimates that a total of \$23+ million per annum was spent on Adult 15+ Walking participation. For those who paid to participate in Walking, the median annual spend was \$50 per Adult participant.

### Motivations for Participation (Adults 15+)

Not surprisingly, the dominant motivation to participate in Walking was 'Physical health/fitness' (65%). Other notable motivators, some of which were almost exclusive to Walking, included 'Walk the dog' (20%), 'To be outdoors/to enjoy nature' (15%) and a 'Way of getting around' (14%). 12% specifically mentioned 'Psychological/mental health/therapy' reasons.

### Reasons For Dropping Out of Participation

The dominant reason for dropping out of Walking' participation was 'Poor health or injury' (40%), followed by 'Not enough time/too many other commitments' (15%).

### Growth & Opportunities

Net growth market opportunity is somewhat limited, as an already large proportion of Adults already take part in Walking. However, a 2% potential increase would equate to nearly 150,000 new participants.

# Walking (Adults 15+)

## Snapshot



AusPlay data, Adult and Walking Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Walking Participants 15+ n=30,452



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 (%)       | 7.9%      | 3.2%      | 12.5%     |
| Is Most Strongly Associated Sport/ Activity (People) | 1,592,989 | 318,844   | 1,274,145 |
| Participation (%)                                    | 43.6%     | 33.2%     | 53.7%     |
| Participation (People)                               | 8,770,154 | 3,303,051 | 5,467,104 |
| Average Frequency Per Annum                          | 209       | 215       | 205       |

| Conversion to Organised & Club                        | Total     | Male      | Female    |
|---|-----------|-----------|-----------|
| Participation (People)                                | 8,770,154 | 3,303,051 | 5,467,104 |
| Organised Participation (People)                      | 350,567   | 120,934   | 229,633   |
| Conversion to organised (%)                           | 4.0%      | 3.7%      | 4.2%      |
| Club Participation (People)                           | 19,254    | 7,580     | 11,674    |
| Conversion to club – from Overall Participation (%)   | 0.2%      | 0.2%      | 0.2%      |
| Conversion to club – from Organised Participation (%) | 5.5%      | 6.3%      | 5.1%      |

# Walking (Adults 15+)

## Snapshot by State



AusPlay data, Adult and Walking Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Walking Participants 15+ n=30,452



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 (%)      | 7.9%      | 8.0%      | 8.2%      | 7.2%      | 8.7%    |
| Is Most Strongly Associated Sport/Activity (People) | 1,592,989 | 509,416   | 414,104   | 291,384   | 124,354 |
| Participation (%)                                   | 43.6%     | 43.0%     | 45.0%     | 42.0%     | 47.3%   |
| Participation (People)                              | 8,770,154 | 2,728,570 | 2,261,175 | 1,704,034 | 678,652 |
| Average Frequency Per Annum                         | 209       | 209       | 212       | 209       | 201     |

| Conversion to Organised & Club                        | Total     | NSW       | VIC       | QLD       | SA      |
|---|-----------|-----------|-----------|-----------|---------|
| Participation (People)                                | 8,770,154 | 2,728,570 | 2,261,175 | 1,704,034 | 678,652 |
| Organised Participation (People)                      | 350,567   | 87,510    | 104,481   | 67,622    | 25,499  |
| Conversion to organised (%)                           | 4.0%      | 3.2%      | 4.6%      | 4.0%      | 3.8%    |
| Club Participation (People)                           | 19,254    | 5,064     | 6,416     | 2,852     | 1,284   |
| Conversion to club – from Overall Participation (%)   | 0.2%      | 0.2%      | 0.3%      | 0.2%      | 0.2%    |
| Conversion to club – from Organised Participation (%) | 5.5%      | 5.8%      | 6.1%      | 4.2%      | 5.0%    |



# Walking (Adults 15+)

## Snapshot by State



AusPlay data, Adult and Walking Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Walking Participants 15+ n=30,452



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     | WA      | ACT     | NT     | TAS     |
|---|-----------|---------|---------|--------|---------|
| Is Most Strongly Associated Sport/Activity (%)      | 7.9%      | 7.4%    | 10.9%   | 6.6%   | 7.9%    |
| Is Most Strongly Associated Sport/Activity (People) | 1,592,989 | 169,711 | 36,726  | 13,274 | 34,019  |
| Participation (%)                                   | 43.6%     | 41.5%   | 47.6%   | 37.1%  | 48.8%   |
| Participation (People)                              | 8,770,154 | 953,167 | 160,392 | 74,366 | 209,796 |
| Average Frequency Per Annum                         | 209       | 210     | 205     | 190    | 220     |

| Conversion to Organised & Club                        | Total     | WA      | ACT     | NT     | TAS     |
|---|-----------|---------|---------|--------|---------|
| Participation (People)                                | 8,770,154 | 953,167 | 160,392 | 74,366 | 209,796 |
| Organised Participation (People)                      | 350,567   | 44,731  | 8,524   | 3,104  | 9,097   |
| Conversion to organised (%)                           | 4.0%      | 4.7%    | 5.3%    | 4.2%   | 4.3%    |
| Club Participation (People)                           | 19,254    | 2,566   | 412     | 45     | 615     |
| Conversion to club – from Overall Participation (%)   | 0.2%      | 0.3%    | 0.3%    | 0.1%   | 0.3%    |
| Conversion to club – from Organised Participation (%) | 5.5%      | 5.7%    | 4.8%    | 1.5%   | 6.8%    |

# Walking (Adults 15+)

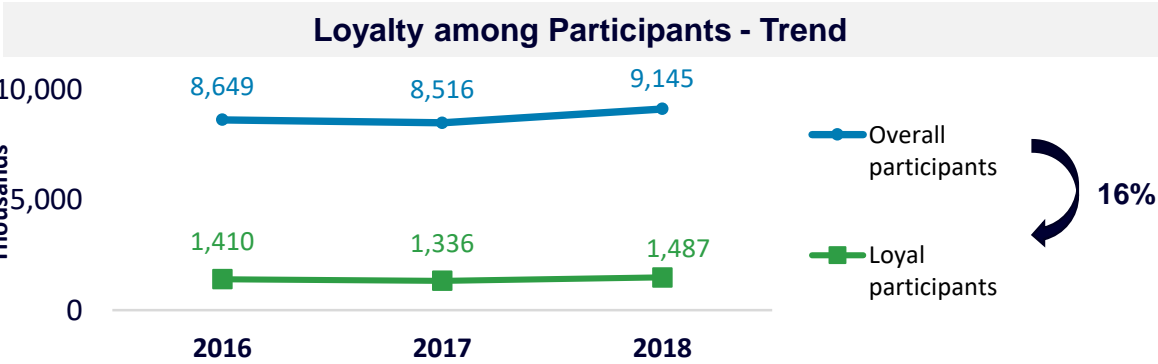
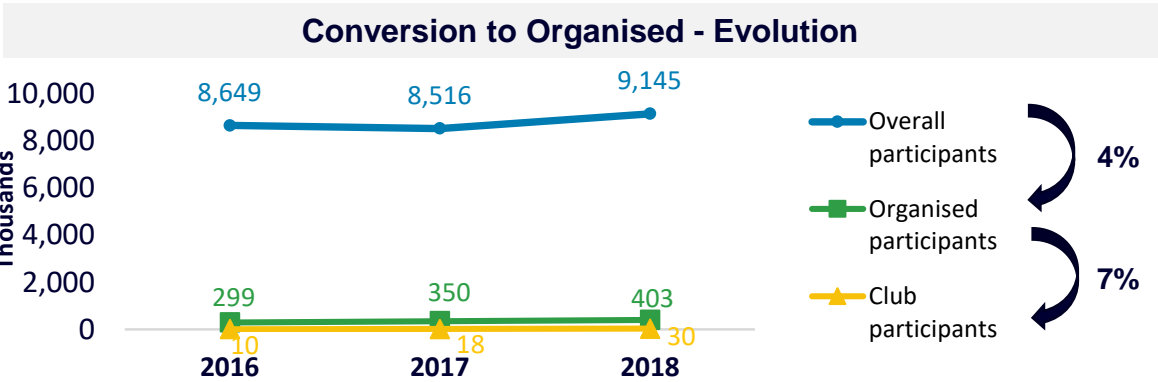
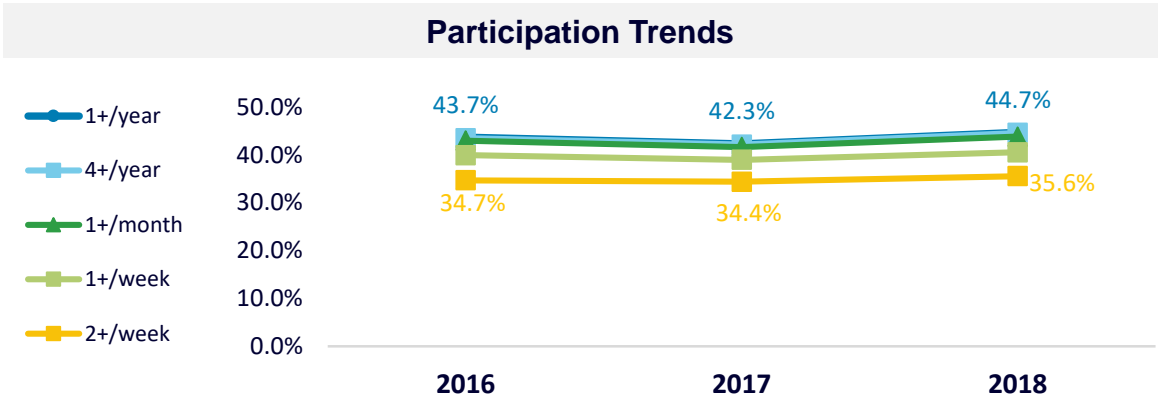
## Trends



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.



# Walking (Recreational) State of Play Report

Adults 15+

# Walking (Adults 15+)

## Participation Levels



AusPlay data, Adult and Walking Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Walking Participants 15+ n=30,452

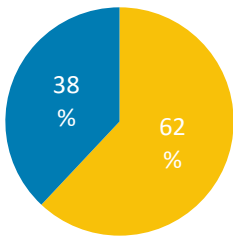


Information on this page provides a snapshot of the Adult 15+ population, at total national level and by gender.

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 |
|-------|---------------------|--------------------|----------------------|
| %     | 43.6%               | 33.2%              | 53.7%                |
| 000's | 8,770.2             | 3,303.1            | 5,467.1              |

### Participation Levels by Age and Gender

#### Peak Participation by Age



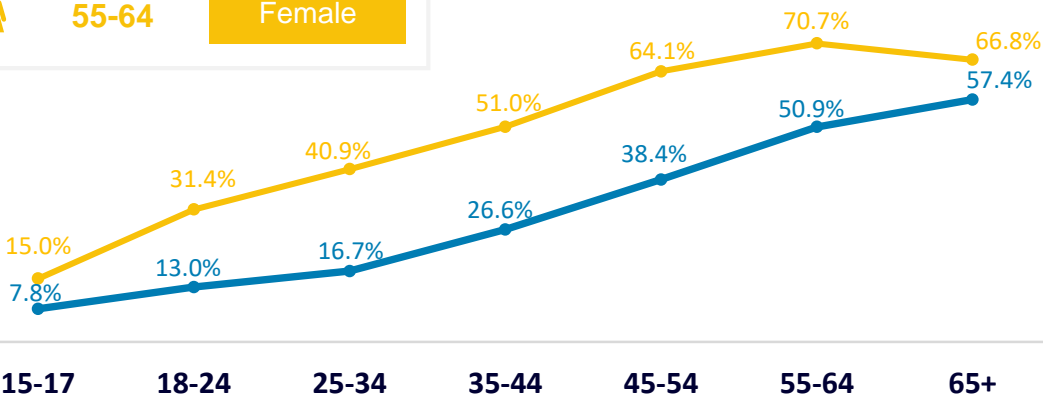
65+

Male



55-64

Female



# Walking (Adults 15+)

## Participation by Location



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

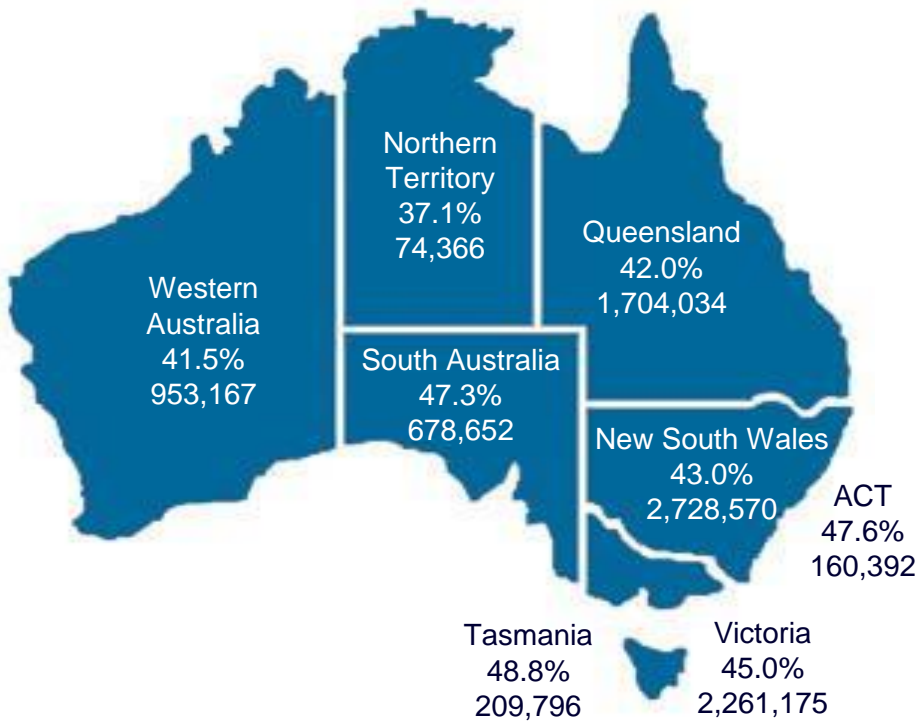


Information on this page provides a snapshot of the Adult 15+ population, based on state and geography.

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 |
|-------|------------------------------|--------------|------------------------|----------------------|
| %     | 43.6%                        | 43.5%        | 45.2%                  | 43.7%                |
| 000's | 8,770.2                      | 6,088.9      | 2,313.6                | 132.4                |

# Walking (Adults 15+)

## Player Profile



AusPlay data, Adult and Walking Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Walking Participants 15+ n=30,452



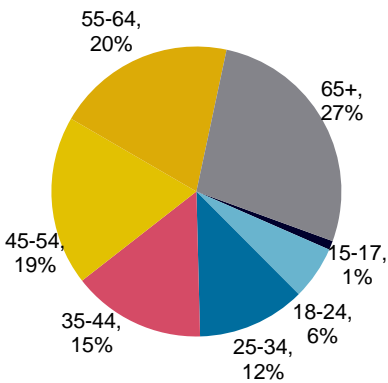
Information on this page provides a snapshot of the Adult 15+ population, based on age and gender, as well as LOTE, People with Disability and Indigenous.

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

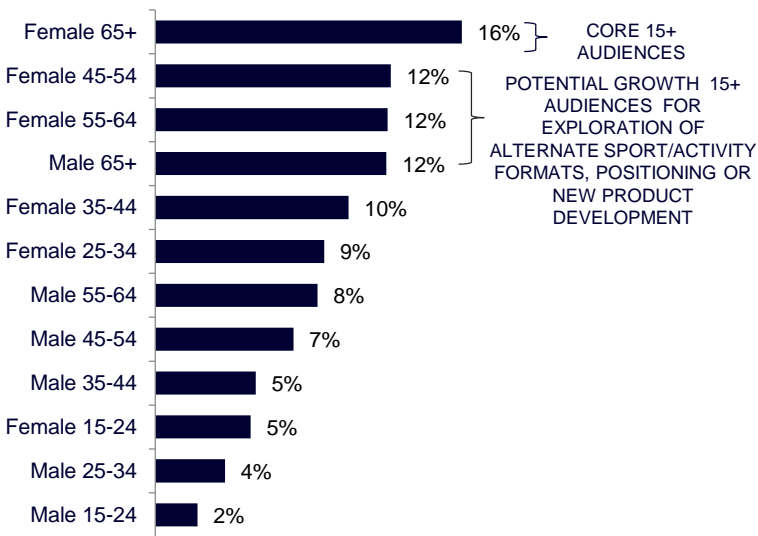
This helps identify the specific age and gender groups that are having the greatest impact on overall participation levels, whilst also highlighting growth opportunities when it comes to sport/activity formats that extend beyond traditional demographic audience needs.

### 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 |
|-------|------------------------------|--|------------------------|------------|
| %     | 43.6%                        | 34.9%  | 49.2%                  | 38.3%      |
| 000's | 8,770.2                      | 1,195.0  | 1,504.8                | 164.6      |

# Walking (Adults 15+)

## Frequency & Duration



AusPlay data, Adult and Walking Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Walking Participants 15+ n=30,452

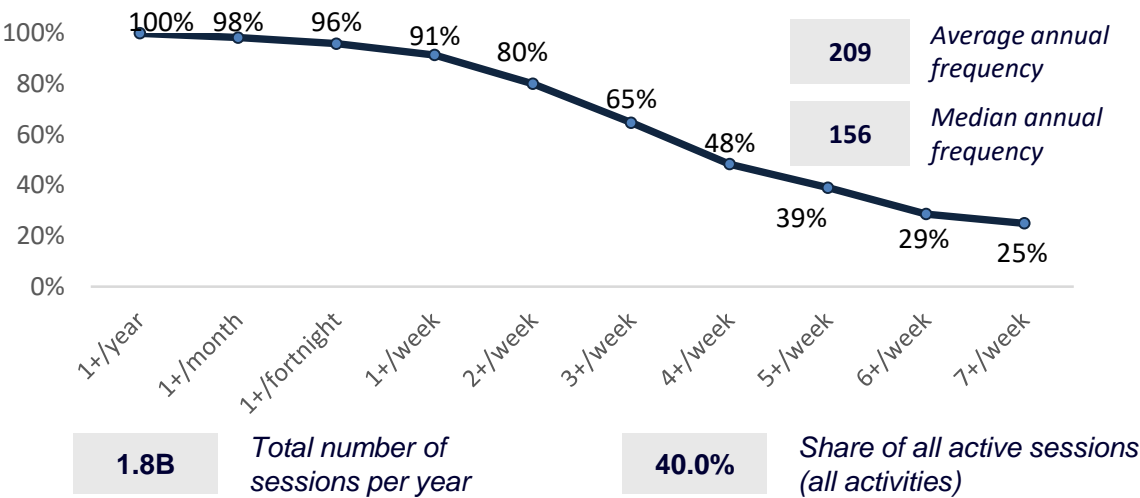


Information on this page provides a snapshot of the Adult 15+ Participant Population, in terms of frequency and duration of participation.

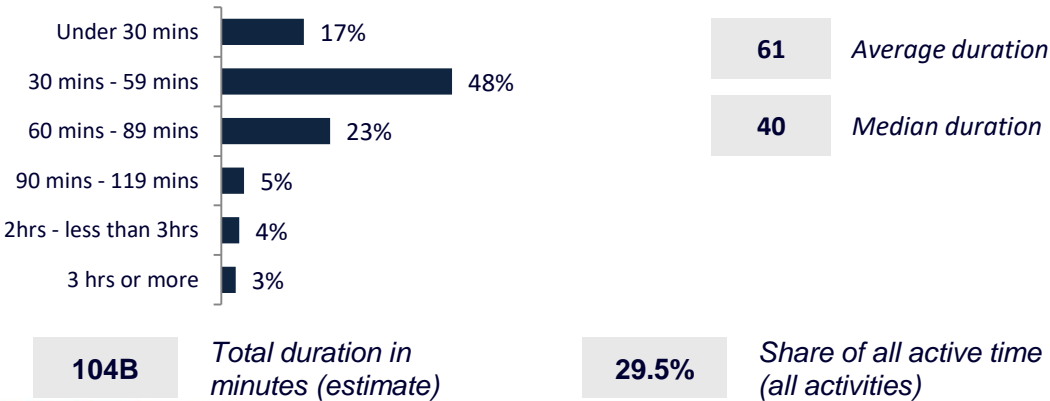
Frequency of participation provides a read on how often participation occurs. Duration provides a read of how long is spent each time participation takes place.

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



# Walking (Adults 15+)

## Participation



AusPlay data, Adult and Walking Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Walking Participants 15+ n=30,452

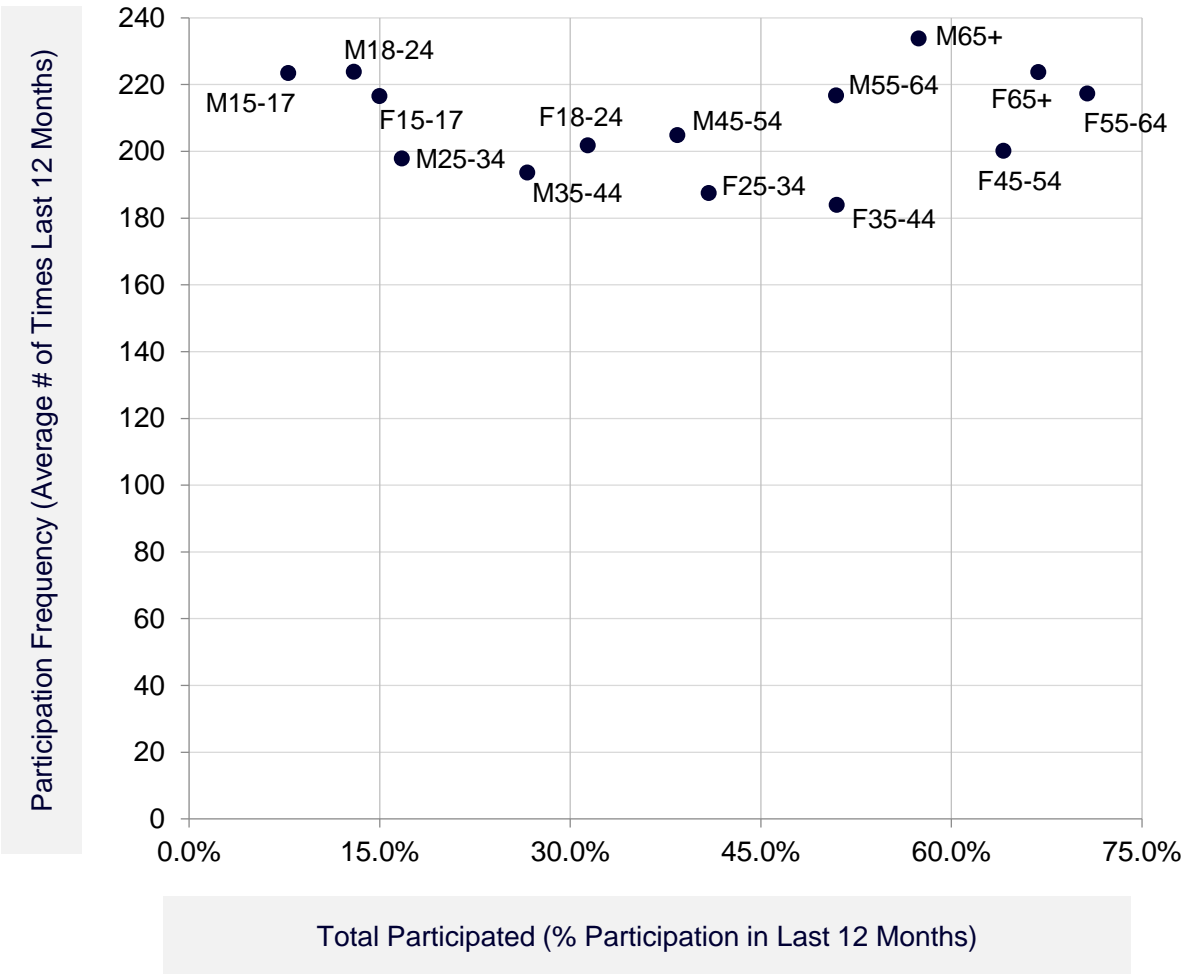


Information on this page provides a snapshot of the Adult 15+ Population in terms of participation and number of times participated in the last 12 months.

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



# Walking (Adults 15+)

## Current Market Position



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

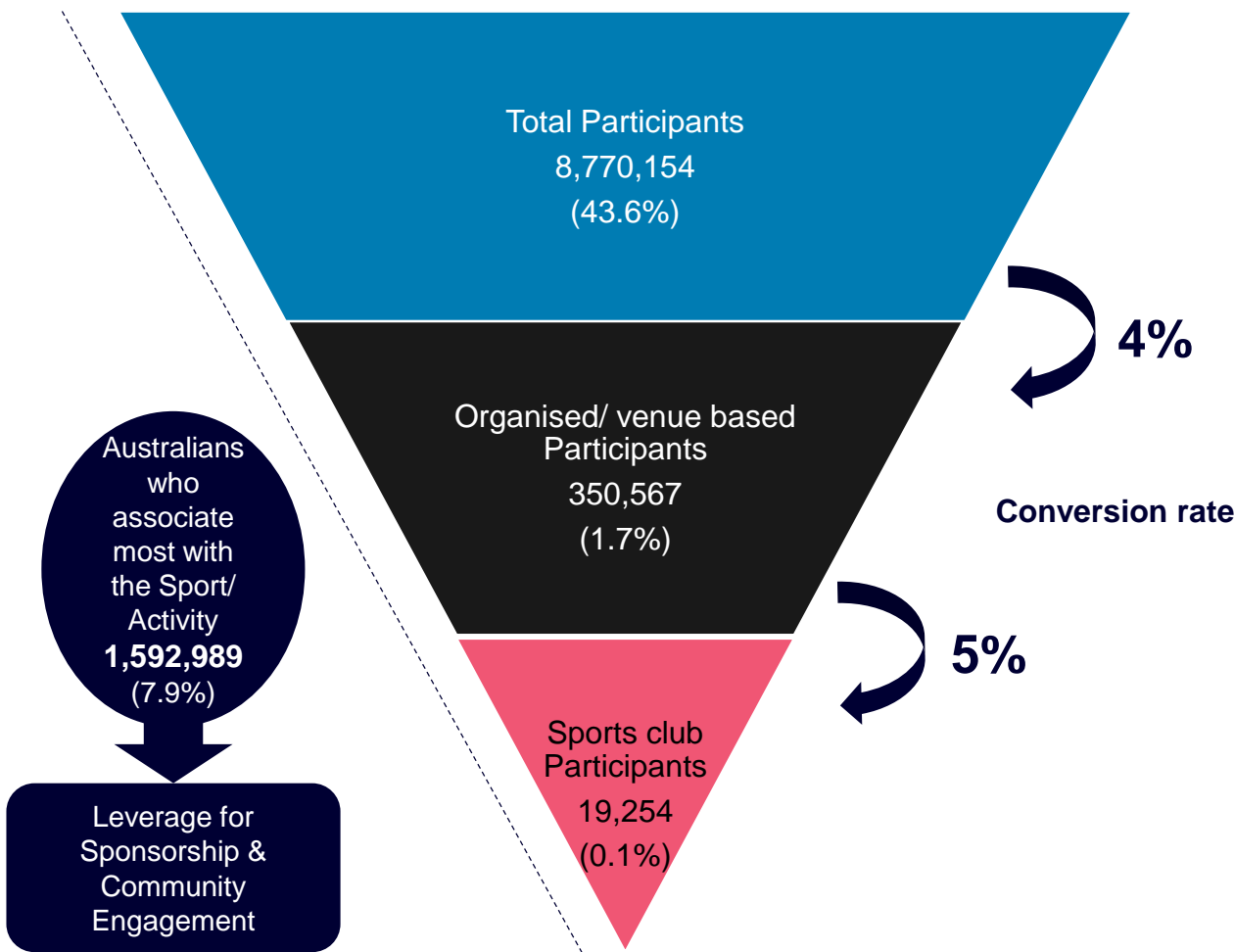


Information on this page provides a snapshot of the Adult 15+ Population, in terms of total participation, organised/venue based participation and sports club participation.

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.

### Walking Association & Participation Levels



# Walking (Adults 15+)

## Engagement



AusPlay data, Adult and Walking Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Walking Participants 15+ n=30,452

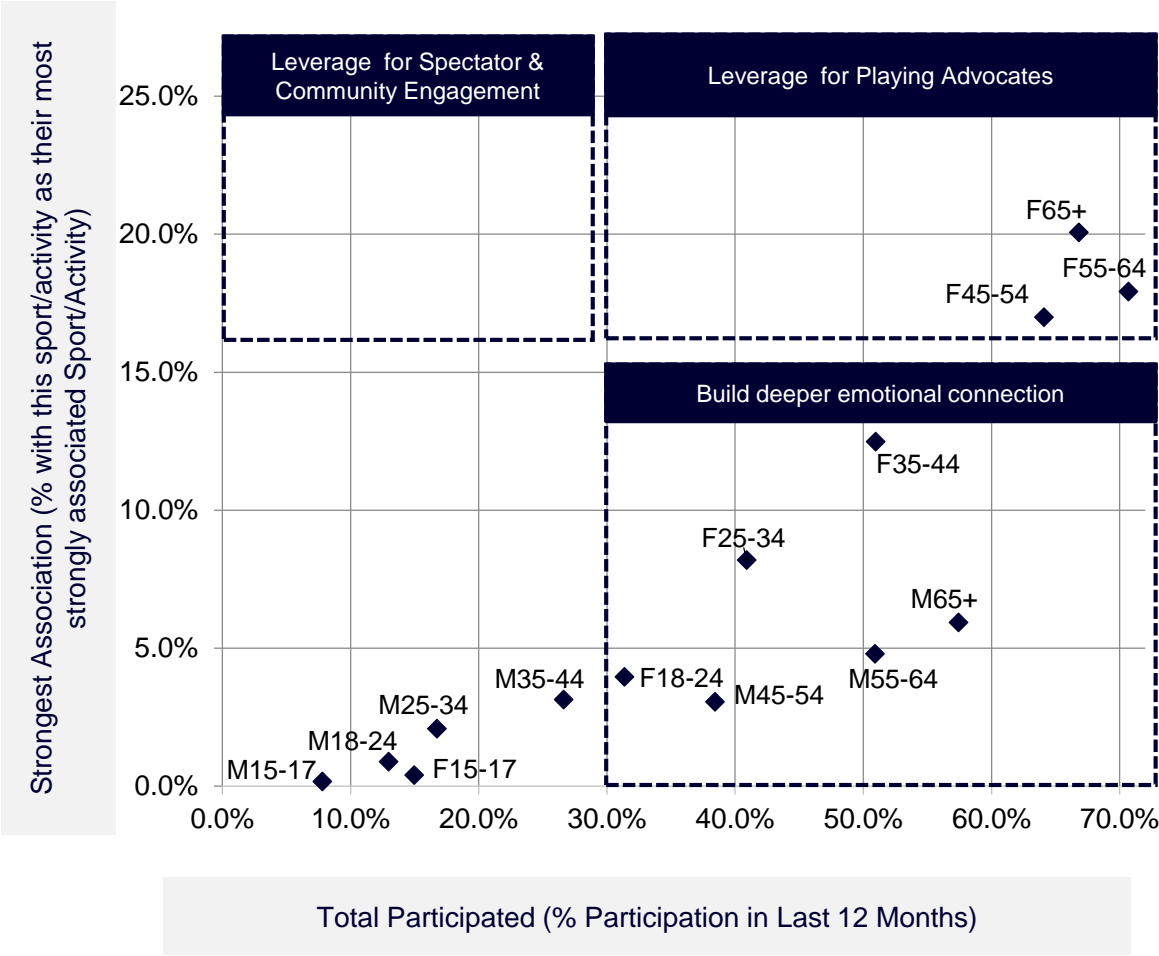


Information on this page provides a snapshot of the Adult 15+ Population in terms of participation and the % of the Adult 15+ Population who have nominated this as the sport/activity they most strongly associate with.

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



# Walking (Adults 15+)

## Spend Profile



AusPlay data, Walking Participant 15+: January 2016 to December 2018 n=30,452

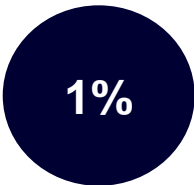


Information on this page provides a snapshot of the Adult 15+ Population, in terms of paid participation.

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.

### Walking Overall Spend Levels



of participants  
paid to  
participate

All

Club

Median annual spend

\$50

\$45

Average annual spend

\$243

\$158

Share of total spend  
(Share of all activities  
participated in)

0.3%

0.1%



Total expenditure on all participation

\$23,294,378



Total expenditure on **club** participation

\$1,581,713

| Participation Spend by Gender        | Total   | Male   | Female  |
|--------------------------------------|---------|--------|---------|
| Paid to Participate (%)              | 1.2%    | 1.0%   | 1.4%    |
| Paid to Participate (People)         | 106,059 | 31,557 | 74,502  |
| Average annual spend per participant | \$243   | \$203  | \$260   |
| Total national annual spend          | \$23.3M | \$6.0M | \$17.3M |

# Walking (Adults 15+)

## Market Outlook & Opportunity



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

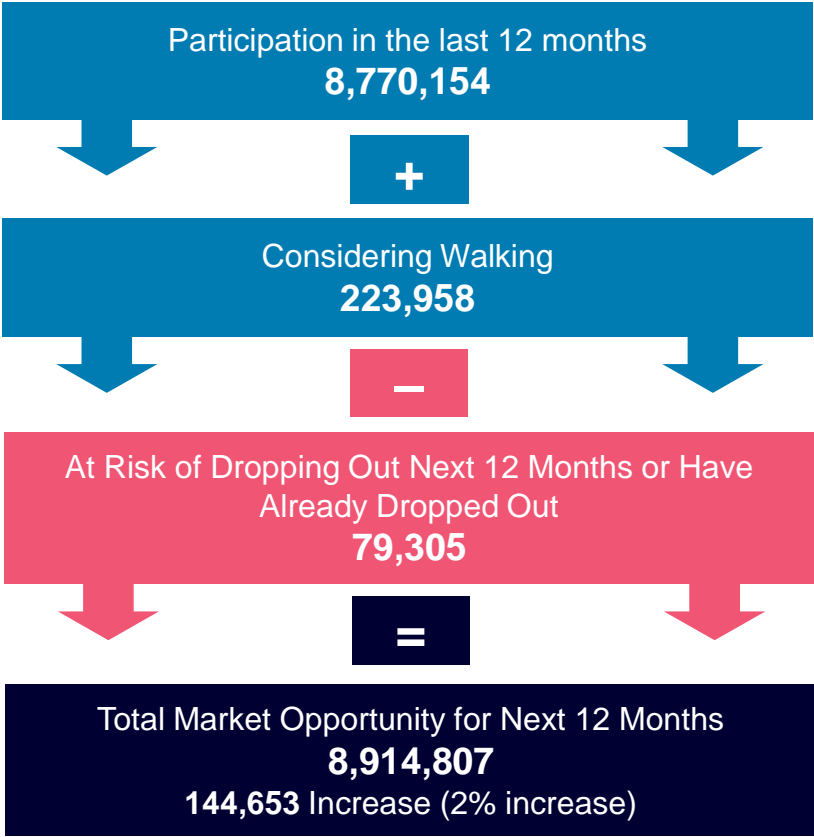


Information on this page provides a snapshot of the Adult 15+ Population in terms of market opportunity.

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.

### Walking Market Opportunity



Walking (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.

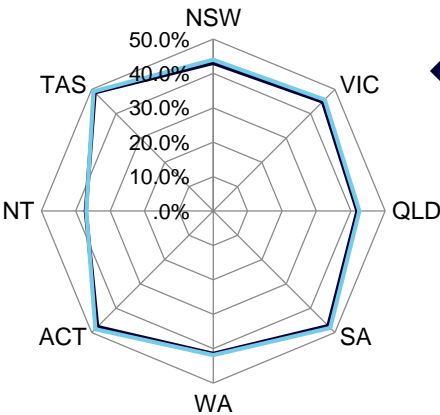
Figures shown represent the volume of people and %'s.

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.

Walking Market Opportunity by Gender & Age

|  | TOTAL     | ♂         | ♀         | 15-24   | 25-44     | 45-64     | 65+       |
|--|-----------|-----------|-----------|---------|-----------|-----------|-----------|
| Participants – last 12 months (%)                            | 43.6%     | 33.2%     | 53.7%     | 19.3%   | 33.6%     | 55.9%     | 62.4%     |
| Participants – last 12 months (People)                       | 8,770,154 | 3,303,051 | 5,467,104 | 611,342 | 2,362,155 | 3,410,352 | 2,386,305 |
| Considering Next 12 Months (%)                               | 1.1%      | 0.8%      | 1.4%      | 0.1%    | 0.7%      | 1.7%      | 1.8%      |
| Considering Next 12 Months (People)                          | 223,958   | 81,856    | 142,102   | 4,223   | 48,621    | 102,170   | 68,944    |
| At Risk of Dropping Out or Have Already Dropped Out (%)      | 0.9%      | 0.7%      | 1.0%      | 1.8%    | 1.0%      | 0.8%      | 0.8%      |
| At Risk of Dropping Out or Have Already Dropped Out (People) | 79,305    | 23,166    | 56,140    | 10,732  | 23,310    | 26,802    | 18,461    |
| Net Gain/ Loss (People)                                      | 144,653   | 58,690    | 85,962    | -6,508  | 25,310    | 75,368    | 50,483    |
| Projected (People)   | 8,914,807 | 3,361,741 | 5,553,066 | 604,833 | 2,387,466 | 3,485,720 | 2,436,787 |

Walking Market Opportunity by State



— Current Participation  
— Projected Participation

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

# Walking (Adults 15+)

## Motivations for Participation



AusPlay data, Walking Participant 15+: January 2016 to December 2018 n=30,452



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 | Walk the dog | Fun/ enjoyment |
| Female | Physical health/ fitness | Walk the dog | Fun/ enjoyment |

#### By Age

|       | 1st                      | 2nd                      | 3rd                            |
|-------|--------------------------|--------------------------|--------------------------------|
| 15-17 | Way of getting around    | Physical health/ fitness | Walk the dog                   |
| 18-24 | Physical health/ fitness | Walk the dog             | Way of getting around          |
| 25-34 | Physical health/ fitness | Walk the dog             | Way of getting around          |
| 35-44 | Physical health/ fitness | Walk the dog             | To be outdoors/to enjoy nature |
| 45-54 | Physical health/ fitness | Walk the dog             | Fun/ enjoyment                 |
| 55-64 | Physical health/ fitness | Walk the dog             | Fun/ enjoyment                 |
| 65+   | Physical health/ fitness | Fun/ enjoyment           | Walk the dog                   |

\* Multiple response question

# Walking (Adults 15+)

## Top 10 Reasons for Drop Out or Consideration



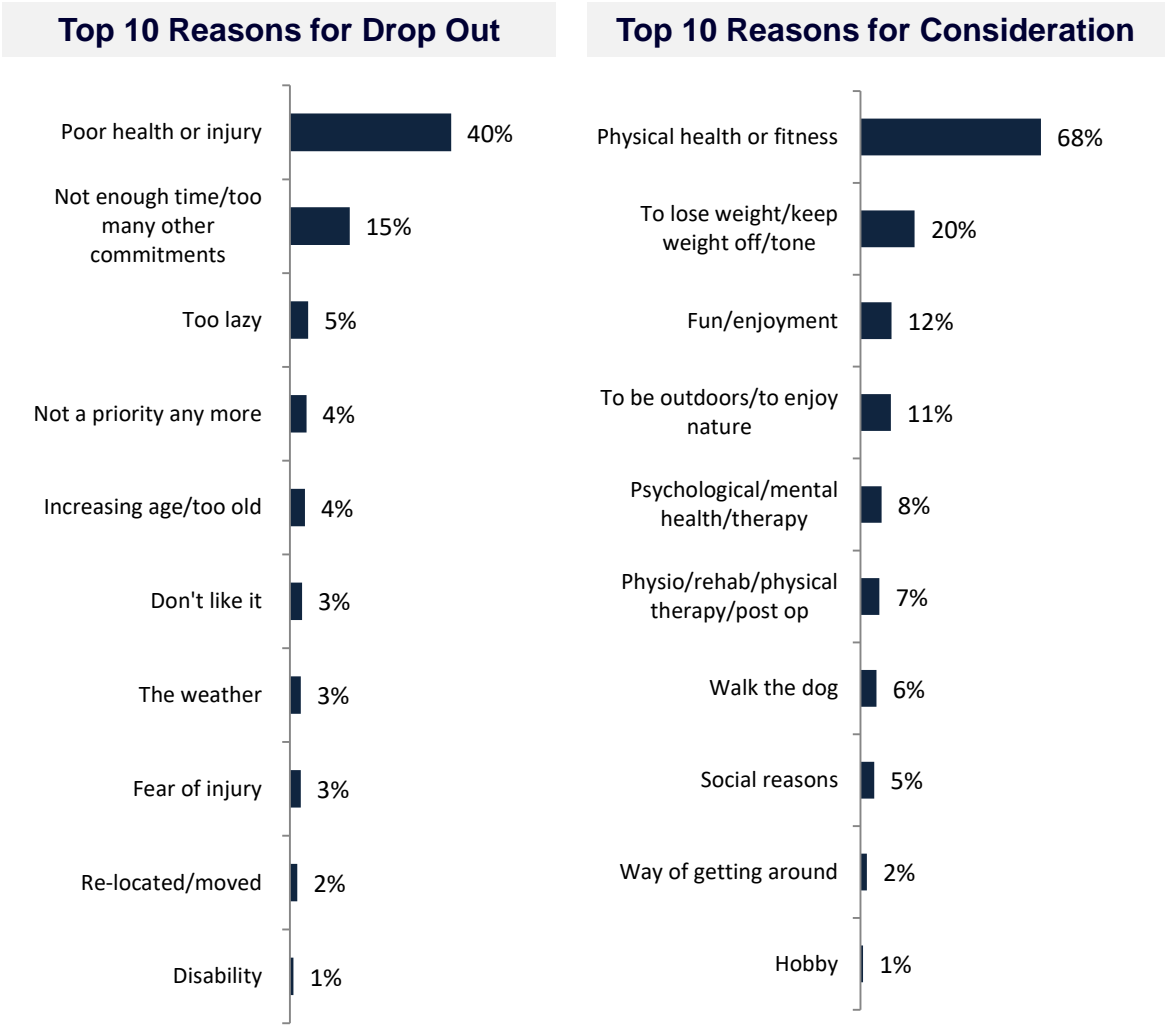
AusPlay data, Adult Walking Participants 15+, that are dropping out of participation in the next 12 months: January 2016 to December 2018 n=288; Adult Population 15+: n=61,579;



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.



\* 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](https://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](mailto:AusPlay@sportaus.gov.au).



**Australian Government**  
**Australian Sports Commission**

[SportAUS.gov.au](https://sportaus.gov.au)

- |  |  |
|--|--|
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|  <a href="https://www.facebook.com/SportAUS">@SportAUS</a>                     |  <a href="https://www.instagram.com/SportAUS">@SportAUS</a>   |
|  <a href="https://www.linkedin.com/company/SportAustralia">Sport Australia</a> |  <a href="https://www.tiktok.com/@australian_institute_of_sport">@australian_institute_of_sport</a> |

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