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AUSPLAY

Yoga

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 3,800 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.

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Yoga: State of Play Report
Key Take Outs

Overall Participation

The annual population estimate for Adults 15+ participating in Yoga was 968,717 (or 4.8% of the Adult 15+ population).

Adult participation was heavily skewed towards females (831,171 or 8.2% of the female population), with females accounting for 86% of participation.

A high proportion of Adult 15+ Yoga participation was organised (75%).

The peak participation rates for Yoga were among Adults aged 25-34 (11.2% for women and 2.0% for men). Women's participation remained at around 10% until their early 60's.

Adults were much more likely to participate in Yoga if they lived in major cities (5.3%) compared to those living in regional (3.8%) and remote (2.8%) areas.

Unlike Pilates, where participation rates of People with a Disability were almost on par with the general population, People with a Disability (2.8%) were less likely than the general population to take part in Yoga.

Frequency & Duration

Adults 15+ who participated in Yoga had a median frequency of 52 sessions per annum (about once per week) and the median session duration was 60 minutes.

Spend

A total of more than $320 million per annum was spent on Adult 15+ Yoga participation. Median annual spend was $360 per Adult participant.

Motivations for Participation (Adults 15+)

The dominant motivation to participate in Yoga was 'Physical health/fitness' (73%). 'Psychological/mental health/therapy' was also a strong motivator (42%).

Reasons For Dropping Out of Participation

The dominant reason for dropping out of Yoga participation was 'Not enough time/too many other commitments' (29%), followed by 'Poor health or injury' (17%), 'Can't afford it' (16%) and 'Don't like it' (14%).

Growth & Opportunities

Net growth market opportunity is high (37% potential increase), reflecting positive trends over the last few years, and is mostly driven by the female market.

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Yoga (Adults 15+)
Snapshot

AusPlay data, Adult and Yoga Participant Population 15+: January 2016 to December 2018
Adult 15+ n=61,579; Yoga Participants 15+ n=2,724

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 (%)	1.5%	0.2%	2.6%
Is Most Strongly Associated Sport/Activity (People)	293,098	24,484	268,615
Participation (%)	4.8%	1.4%	8.2%
Participation (People)	968,717	137,547	831,171
Average Frequency Per Annum	92	125	87

Conversion to Organised & Club	Total	Male	Female
Participation (People)	968,717	137,547	831,171
Organised Participation (People)	726,546	92,267	634,279
Conversion to organised (%)	*75%*	*67%*	*76%*
Club Participation (People)	10,717	1,679	9,039
Conversion to club – from Overall Participation (%)	*1.1%*	*1.2%*	*1.1%*
Conversion to club – from Organised Participation (%)	*1.5%*	*1.8%*	*1.4%*

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Yoga (Adults 15+)
Snapshot by State

AusPlay data, Adult and Yoga Participant Population 15+: January 2016 to December 2018
Adult 15+ n=61,579; Yoga Participants 15+ n=2,724

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 (%)	1.5%	1.6%	1.5%	1.3%	1.0%
Is Most Strongly Associated Sport/Activity (People)	293,098	104,393	75,669	52,498	14,647
Participation (%)	4.8%	5.1%	4.9%	4.4%	4.1%
Participation (People)	968,717	322,996	247,336	177,131	58,843
Average Frequency Per Annum	92	92	95	93	76

Conversion to Organised & Club	Total	NSW	VIC	QLD	SA
Participation (People)	968,717	322,996	247,336	177,131	58,843
Organised Participation (People)	726,546	240,220	186,414	138,579	42,285
Conversion to organised (%)	*75.0%*	*74.4%*	*75.4%*	*78.2%*	*71.9%*
Club Participation (People)	10,717	1,408	4,199	2,286	137
Conversion to club – from Overall Participation (%)	*1.1%*	*0.4%*	*1.7%*	*1.3%*	*0.2%*
Conversion to club – from Organised Participation (%)	*1.5%*	*0.6%*	*2.3%*	*1.6%*	*0.3%*

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Yoga (Adults 15+)
Snapshot by State

AusPlay data, Adult and Yoga Participant Population 15+: January 2016 to December 2018
Adult 15+ n=61,579; Yoga Participants 15+ n=2,724

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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 (%)	1.5%	1.4%	1.6%	0.9%	1.6%
Is Most Strongly Associated Sport/Activity (People)	293,098	31,768	5,485	1,819	6,818
Participation (%)	4.8%	4.9%	6.6%	6.8%	3.2%
Participation (People)	968,717	112,894	22,263	13,595	13,658
Average Frequency Per Annum	92	95	69	91	135

Conversion to Organised & Club	Total	WA	ACT	NT	TAS
Participation (People)	968,717	112,894	22,263	13,595	13,658
Organised Participation (People)	726,546	82,439	16,854	10,668	9,086
Conversion to organised (%)	*75.0%*	*73.0%*	*75.7%*	*78.5%*	*66.5%*
Club Participation (People)	10,717	1,430	1,107	0	150
Conversion to club – from Overall Participation (%)	*1.1%*	*1.3%*	*5.0%*	*0.0%*	*1.1%*
Conversion to club – from Organised Participation (%)	*1.5%*	*1.7%*	*6.6%*	*0.0%*	*1.7%*

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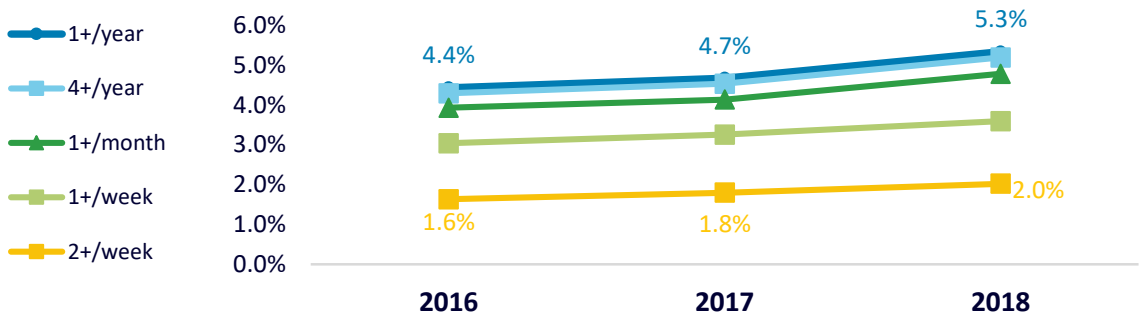
Yoga (Adults 15+)
Trends

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

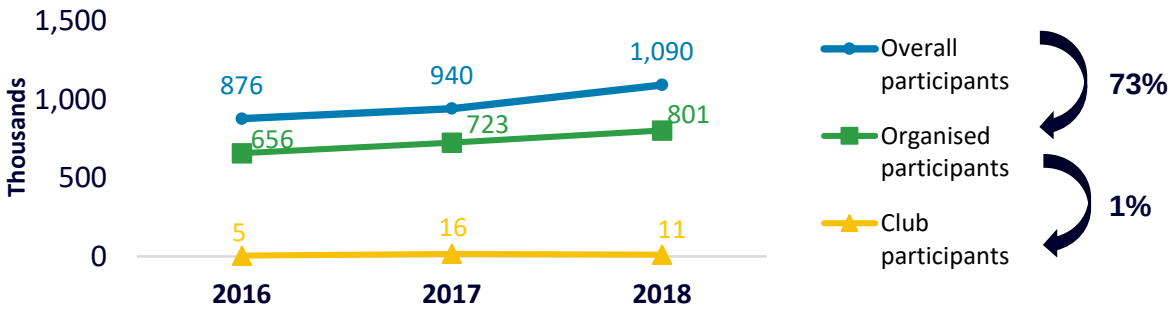
As more data becomes available in subsequent report releases, time series data will be expanded.

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

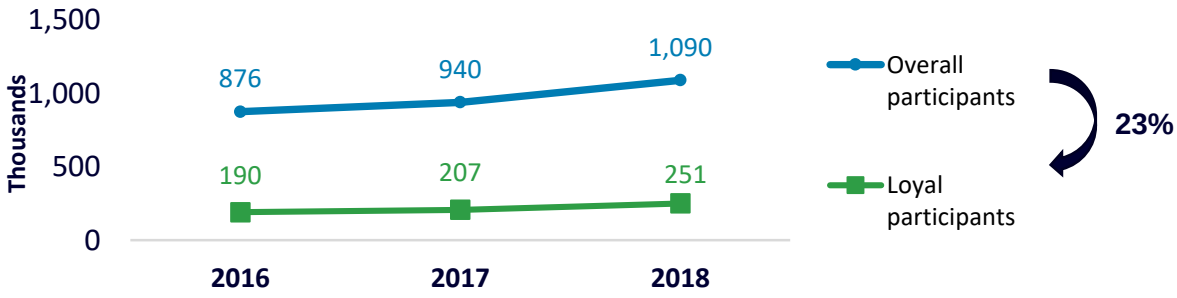
Participation Trends



Conversion to Organised - Evolution



Loyalty among Participants - Trend



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Yoga
Participation by Life Stage

AusPlay data, Adult and Yoga Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Yoga Participants 15+ n=2,724

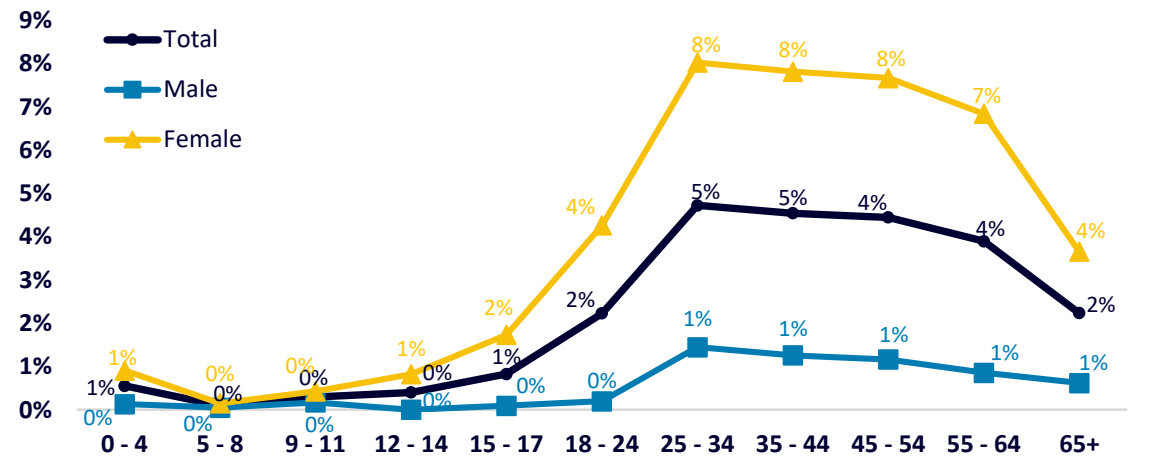
AusPlay data, Children and Yoga Participant Population 0-14: January 2016 to December 2018 Children 0-14 n=10,285; Yoga Participants 0-14 n=29

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

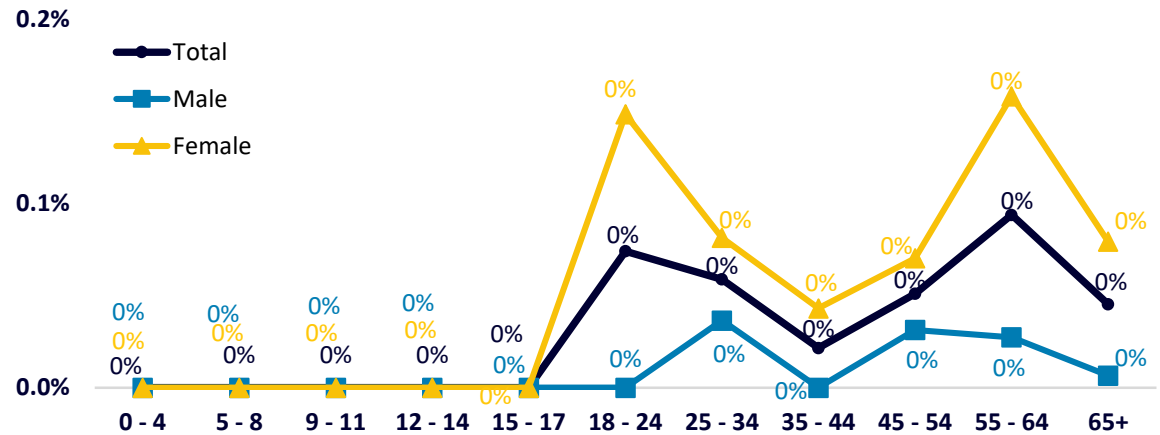
Figures are shown as the % of each age who have participated.

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



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Yoga

State of Play Report

Adults 15+

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Yoga (Adults 15+)
Participation Levels

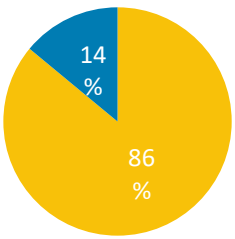
AusPlay data, Adult and Yoga Participant Population 15+: January 2016 to December 2018
Adult 15+ n=61,579; Yoga Participants 15+ n=2,724

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



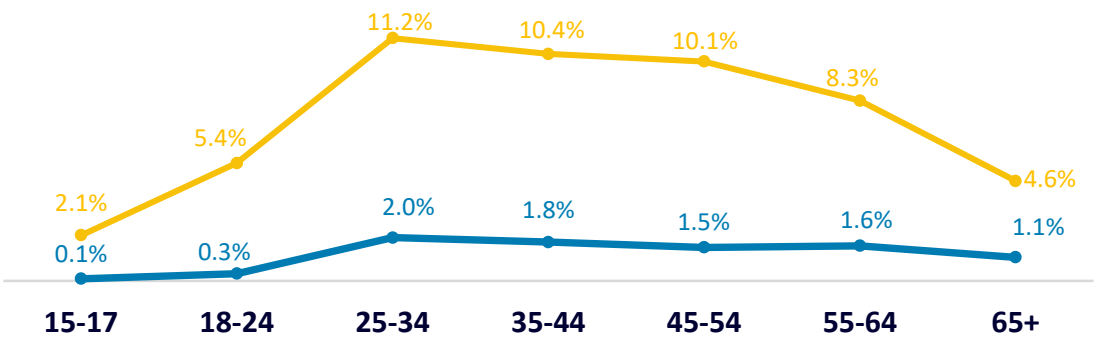
Participation Levels

	Total Participation	Male Participation	Female Participation
%	4.8%	1.4%	8.2%
000's	968.7	137.5	831.2

Participation Levels by Age and Gender

Peak Participation by Age

Male	25-34	Male
Female	25-34	Female



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Yoga (Adults 15+)
Participation by Location

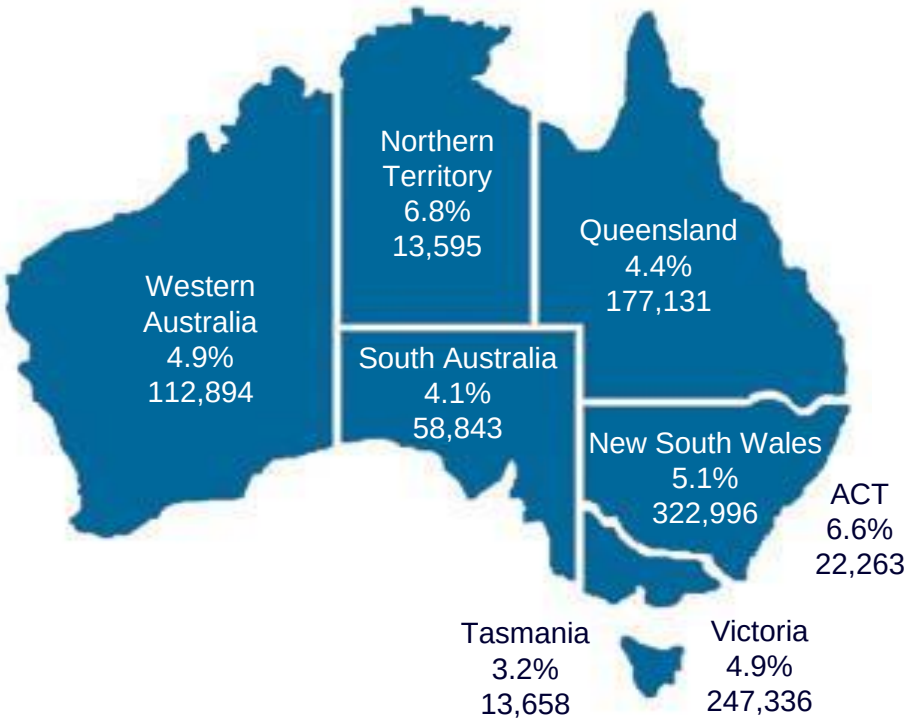
AusPlay data, Adult Population 15+: January 2016 to December 2018 Adult 15+ n=61,579

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
%	4.8%	5.3%	3.8%	2.8%
000's	968.7	745.9	195.9	8.4

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Yoga (Adults 15+)
Player Profile

AusPlay data, Adult and Yoga Participant Population 15+: January 2016 to December 2018
Adult 15+ n=61,579; Yoga Participants 15+ n=2,724

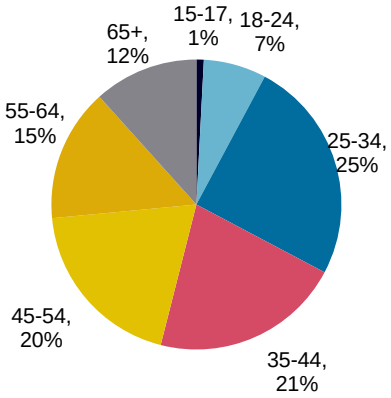
Information on this page provides a snapshot of the Adult 15+ population, based on age and gender, as well as LOTE, People with Disability and Indigenous.

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

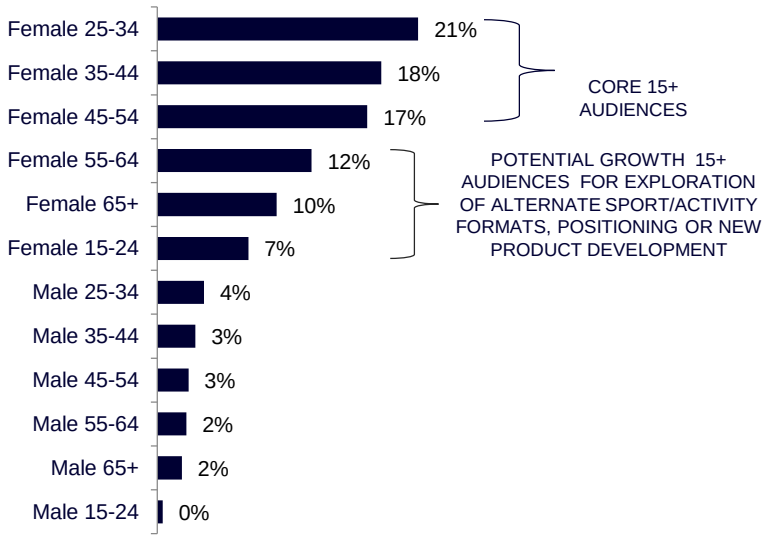
This helps identify the specific age and gender groups that are having the greatest impact on overall participation levels, whilst also highlighting growth opportunities when it comes to sport/activity formats that extend beyond traditional demographic audience needs.

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
%	4.8%	5.2%	2.8%	3.7%
000's	968.7	176.2	85.4	15.9

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Yoga (Adults 15+)
Frequency & Duration

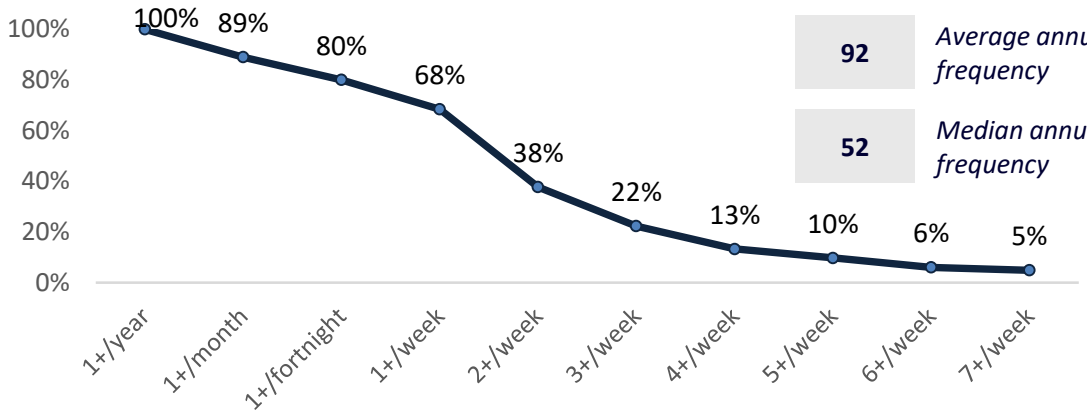
AusPlay data, Adult and Yoga Participant Population 15+: January 2016 to December 2018
Adult 15+ n=61,579; Yoga Participants 15+ n=2,724

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



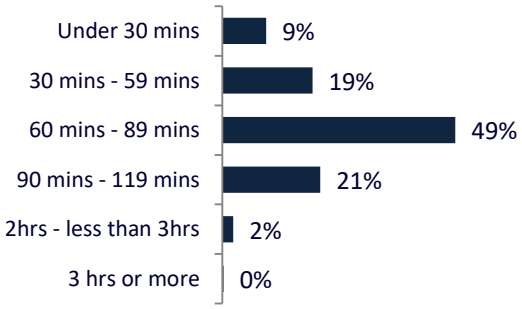
92 *Average annual frequency*

52 *Median annual frequency*

89.4M *Total number of sessions per year*

1.9% *Share of all active sessions (all activities)*

Participation Levels by Age and Gender



68 *Average duration*

60 *Median duration*

5,454M *Total duration in minutes (estimate)*

1.5% *Share of all active time (all activities)*

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Yoga (Adults 15+)
Participation

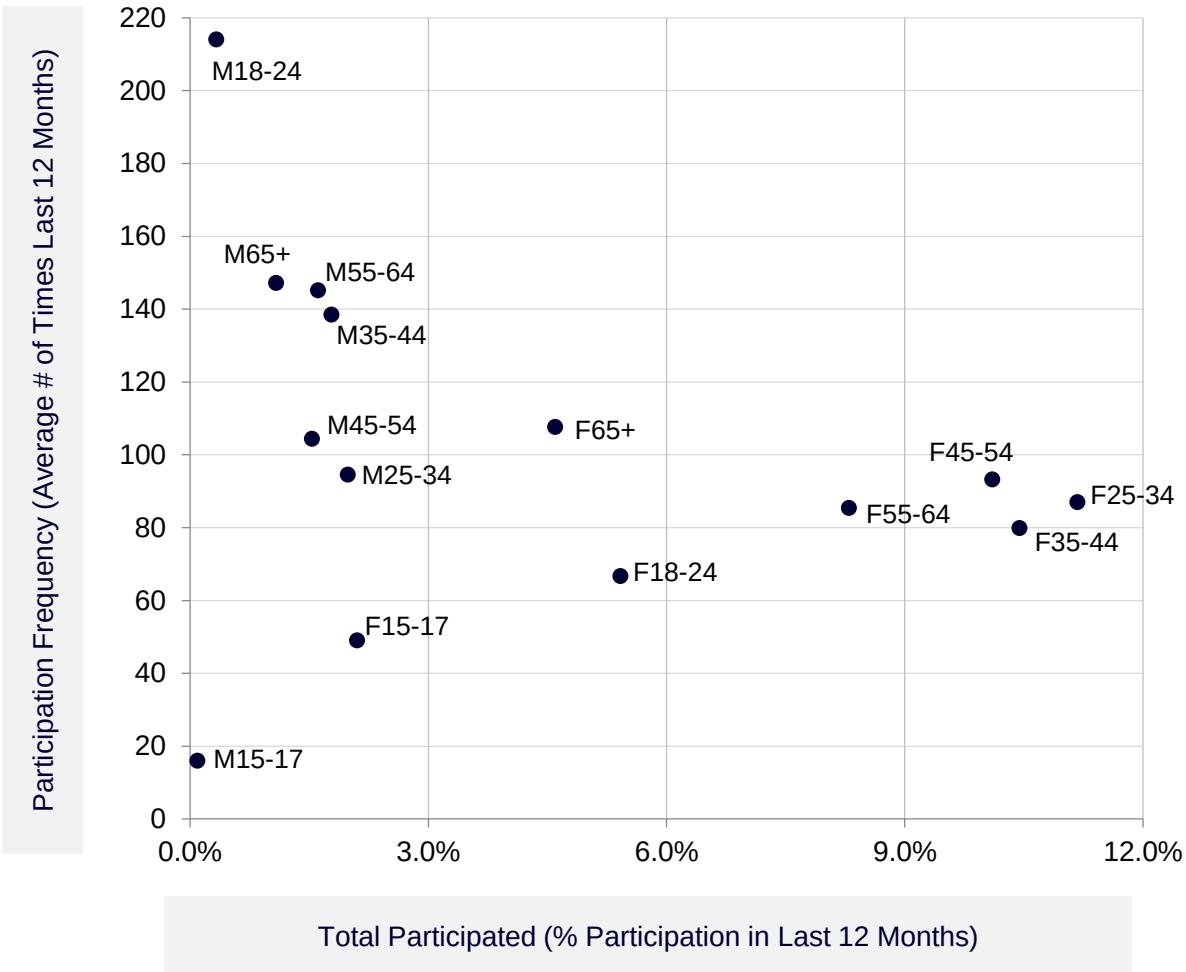
AusPlay data, Adult and Yoga Participant Population 15+: January 2016 to December 2018
Adult 15+ n=61,579; Yoga Participants 15+ n=2,724

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



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Yoga (Adults 15+)
Current Market Position

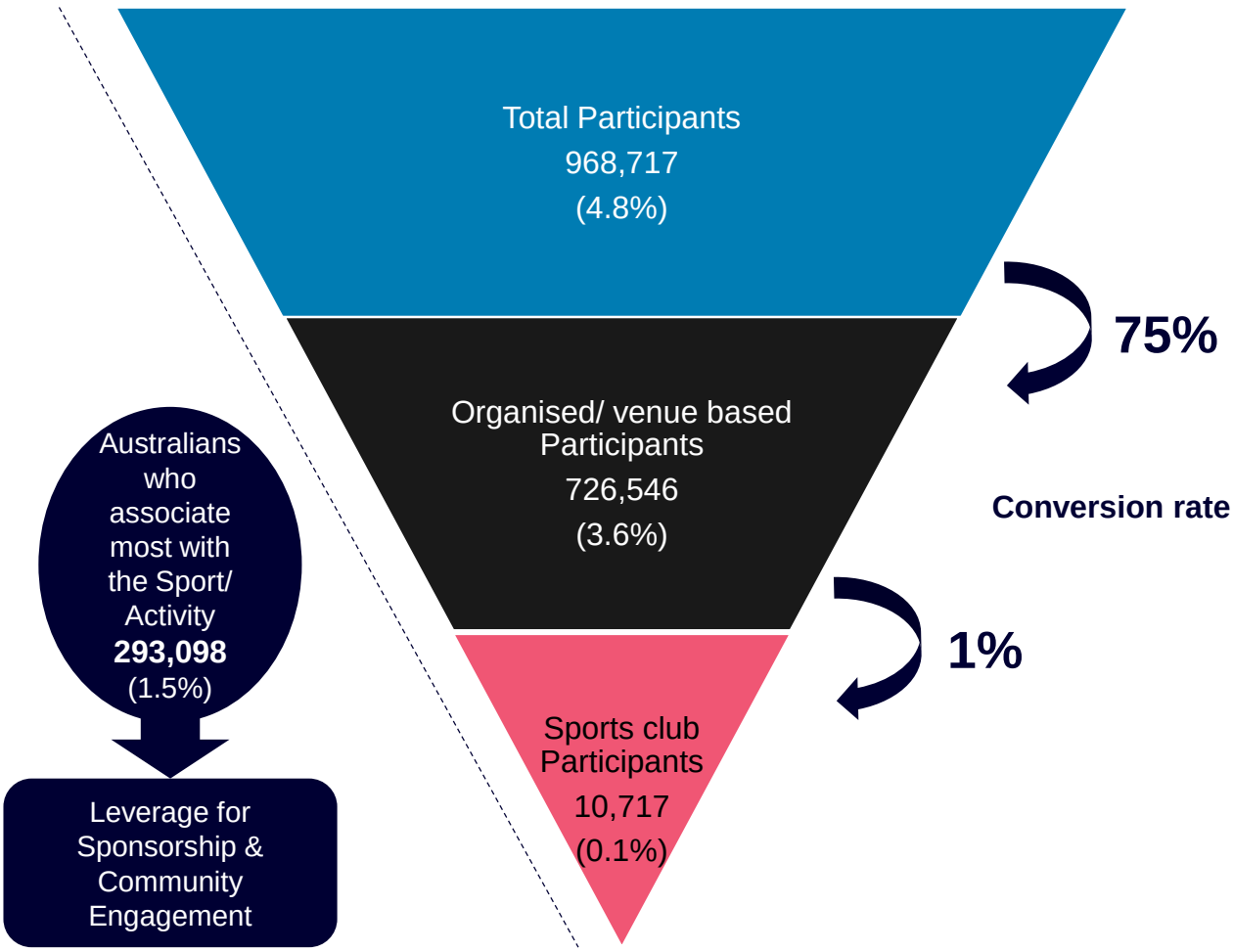
AusPlay data, Adult Population 15+: January 2016 to December 2018 Adult 15+ n=61,579

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.

Yoga Association & Participation Levels



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Yoga (Adults 15+)
Engagement

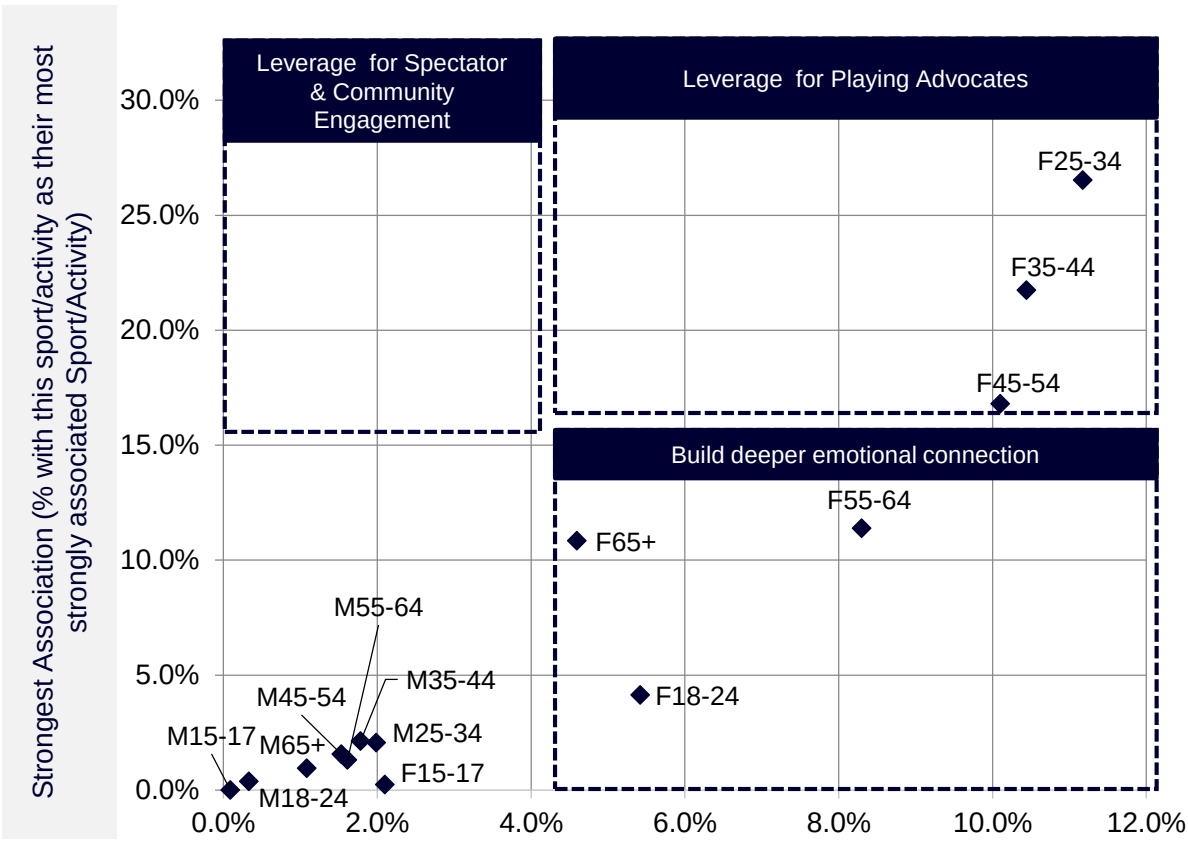
AusPlay data, Adult and Yoga Participant Population 15+: January 2016 to December 2018
Adult 15+ n=61,579; Yoga Participants 15+ n=2,724

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



Total Participated (% Participation in Last 12 Months)

Yoga (Adults 15+)
Spend Profile

AusPlay data, Yoga Participant 15+: January 2016 to December 2018 n=2,724

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.

Yoga Overall Spend Levels

68%

of participants paid to participate

	All	Club
Median annual spend	**$360**	**$30**
Average annual spend	**$545**	**$281**
Share of total spend (Share of all activities participated in)	**3.7%**	**0.1%**

Total expenditure on all participation

$320,434,708

*Total expenditure on **club** participation*

$1,713,726

Participation Spend by Gender	Total	Male	Female
Paid to Participate (%)	67.8%	60.9%	68.9%
Paid to Participate (People)	656,682	83,825	572,857
Average annual spend per participant	$545	$612	$535
Total national annual spend	$320.4M	$44.0M	$276.4M

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Yoga (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.

Yoga Market Opportunity

Participation in the last 12 months
968,717

+

Considering Yoga
413,052

–

At Risk of Dropping Out Next 12 Months or Have Already Dropped Out
50,946

=

Total Market Opportunity for Next 12 Months
1,330,823
362,106 Increase (37% increase)

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Yoga (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.

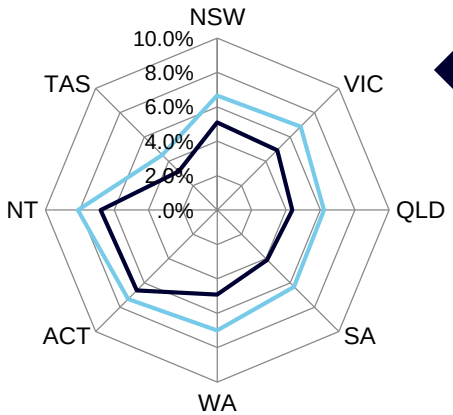
Figures shown represent the volume of people and %'s.

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.

Yoga Market Opportunity by Gender & Age

	TOTAL	♂	♀	15-24	25-44	45-64	65+
Participants – last 12 months (%)	4.8%	1.4%	8.2%	2.4%	6.4%	5.5%	3.0%
Participants – last 12 months (People)	968,717	137,547	831,171	75,746	446,993	333,031	112,947
Considering Next 12 Months (%)	2.1%	0.6%	3.4%	1.3%	2.5%	2.5%	1.2%
Considering Next 12 Months (People)	413,052	62,790	350,262	39,618	174,160	154,363	44,910
At Risk of Dropping Out or Have Already Dropped Out (%)	5.3%	2.7%	5.7%	9.6%	4.6%	5.1%	5.2%
At Risk of Dropping Out or Have Already Dropped Out (People)	50,946	3,655	47,291	7,303	20,733	17,041	5,868
Net Gain/ Loss (People)	362,106	59,135	302,971	32,315	153,427	137,322	39,043
Projected (People)	**1,330,823**	**196,682**	**1,134,142**	**108,061**	**600,420**	**470,353**	**151,989**

Yoga Market Opportunity by State



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

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Yoga (Adults 15+)
Motivations for Participation

AusPlay data, Yoga Participant 15+: January 2016 to December 2018 n=2,724

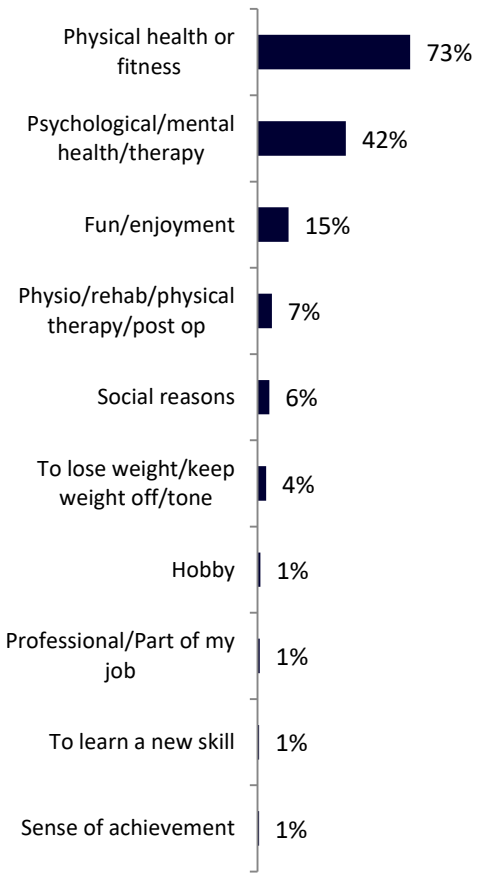
Information on this page provides a snapshot of the Adult 15+ Population as well as by gender and age in terms of motivations to participate.

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	Psychological/ mental health/therapy	Fun/ enjoyment
Female	Physical health/ fitness	Psychological/ mental health/therapy	Fun/ enjoyment

By Age

	1st	2nd	3rd
15-17	Physical health/ fitness	Psychological/ mental health/therapy	Fun/ enjoyment
18-24	Physical health/ fitness	Psychological/ mental health/therapy	Fun/ enjoyment
25-34	Physical health/ fitness	Psychological/ mental health/therapy	Fun/ enjoyment
35-44	Physical health/ fitness	Psychological/ mental health/therapy	Fun/ enjoyment
45-54	Physical health/ fitness	Psychological/ mental health/therapy	Fun/ enjoyment
55-64	Physical health/ fitness	Psychological/ mental health/therapy	Fun/ enjoyment
65+	Physical health/ fitness	Psychological/ mental health/therapy	Fun/ enjoyment

* Multiple response question

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Yoga (Adults 15+)

Top 10 Reasons for Drop Out or Consideration

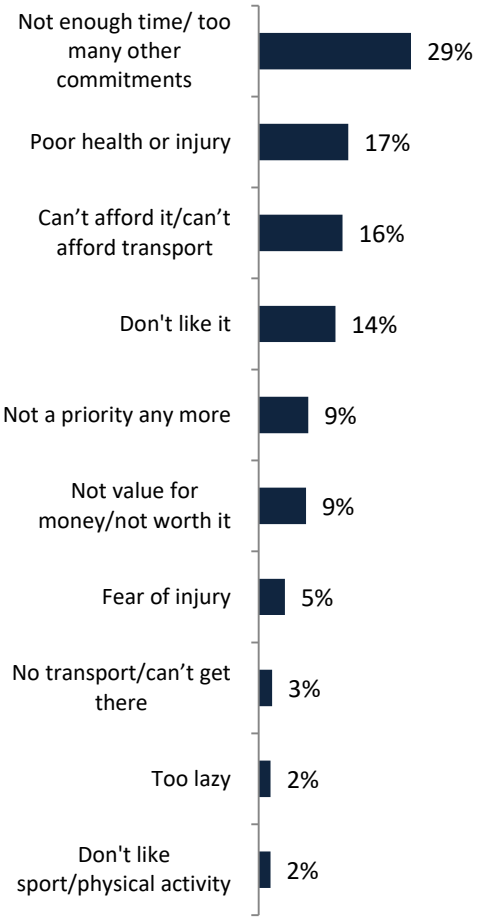
AusPlay data, Adult Yoga Participants 15+, that are dropping out of participation in the next 12 months: January 2016 to December 2018 n=140; Adult Population 15+: n=61,579;

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

SPORTAUS AUSPLAY

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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