



Australian Government
Australian Sports Commission

Yachting Research Report

gemba group with the ASC

April, 2013

CONFIDENTIAL & PROPRIETARY

© GEMBA GROUP

Introduction to the Report

The Australian Sports Commission are committed to providing sports in Australia the necessary resources and data they require to direct strategy and commercialisation of their respective sports.

- As such, the Australian Sports Commission are working with The gemba Group to provide on a twice annual basis detailed consumer research data and benchmarks on participation and engagement in sports among Australians.
- These reports, individualised for each sport, draw upon two separate research studies undertaken by The gemba Group and endorsed by the Australian Sports Commission. Both research studies provide a representative view of Australian's participation and engagement in sport.
- The gemba Sports & Entertainment Report (gSER) is a continuous tracking study of Australians aged 16 to 64 years and provides an assessment of consumer engagement in individual sports and entertainment pursuits.
- The gemba Active Sports Participation study (gASP) is a continuous tracking study of Australians aged 5 to 75 years and provides a detailed assessment of consumer participation in individual sports and leisure activities.
- The combination of these two studies provides sports in Australia a detailed means to understand how they are positioned, how they are performing, and insights into how they can improve to be stronger sports in Australia.



Table of Contents

	Page
gemba Active Sports Participation Report	6
Section 1 – Competitive Landscape	8
Section 2 – Market Size	26
Section 3 – Motivations and Barriers	32
Section 4 – Retention	38
Section 5 – Image Perceptions	42
Section 6 – Commercial Impact	46



Summary of Research Sources



- January 2012 - December 2012
- 7800 responses per annum
- 35 minute online survey
- 50% male/female, aged 16-65 years, split evenly across 16 - 29, 30 - 44 and 45 - 65
- Markets: Nationally representative of Capital City and Regional populations in each State and Territory
- Data is weighted to most recent ABS Census based on Age, Gender and Location



- January 2012 - December 2012
- 14971 responses per annum
- 20 minute online survey
- 50% male/female, aged 5-75 years, with parents completing the survey for children aged 5-15
- Markets: Nationally representative of Capital City and Regional populations in each State and Territory
- Data is weighted to most recent ABS Census based on Age, Gender and Location



ACTIVE SPORTS PARTICIPATION



AUSTRALIA

Yachting Report

* The following section of the report excludes Walking,
Bushwalking, Fishing and Ten Pin Bowling



Australian Sports Commission: gemba Research – January 2012 to December 2012



Yachting Report

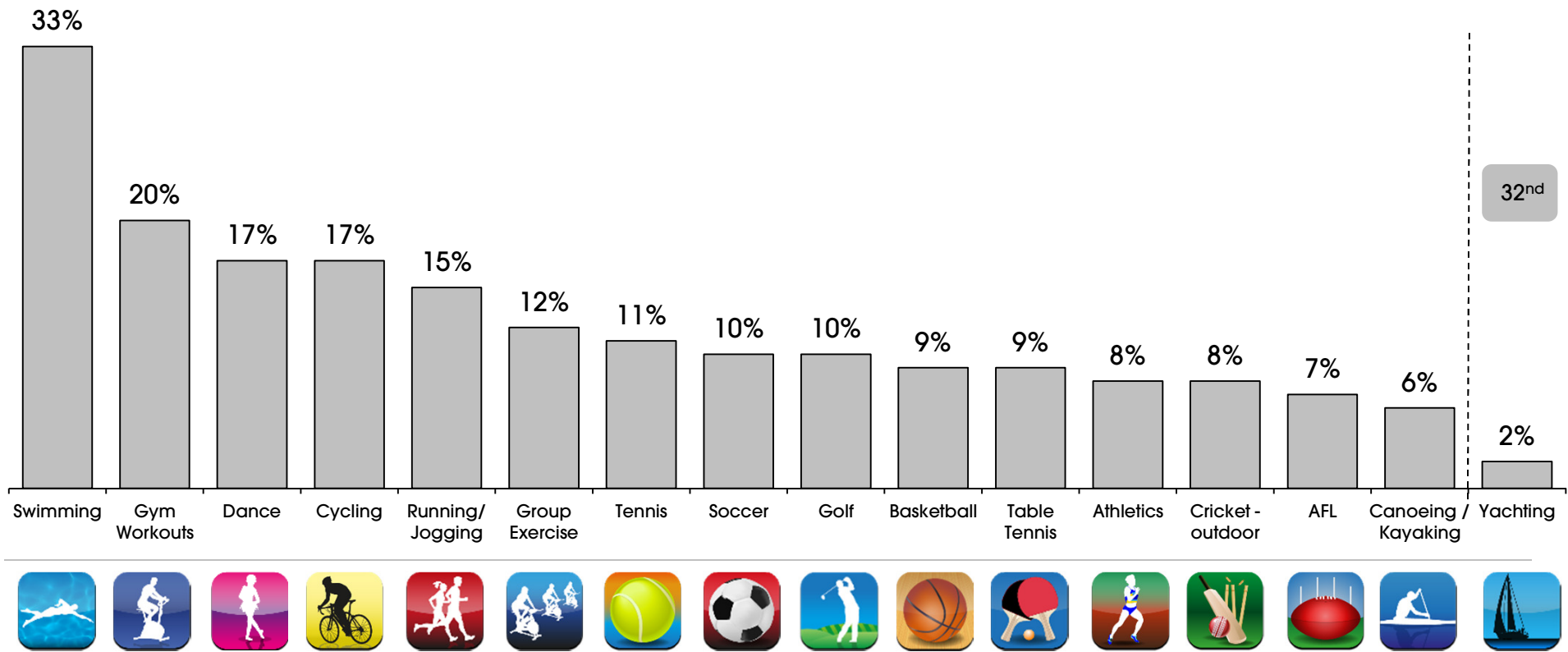
SECTION 1
**COMPETITIVE
LANDSCAPE**



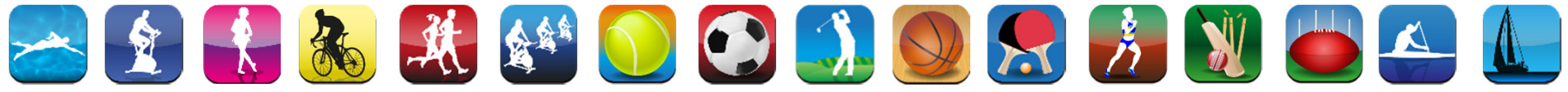


1.1 Participation Rate in Sports – Past 12 Months

Total Population – Top 15 Sports



32nd



Q. Which of these activities have you participated in the past 12 months?

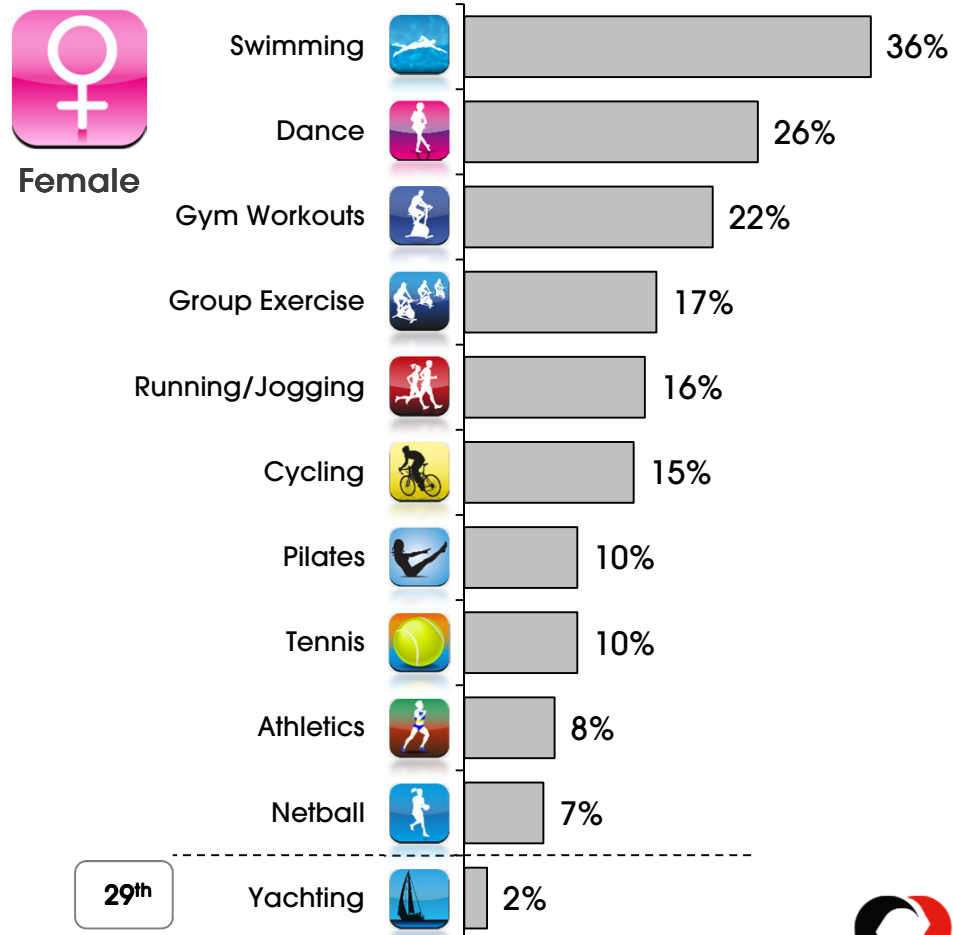
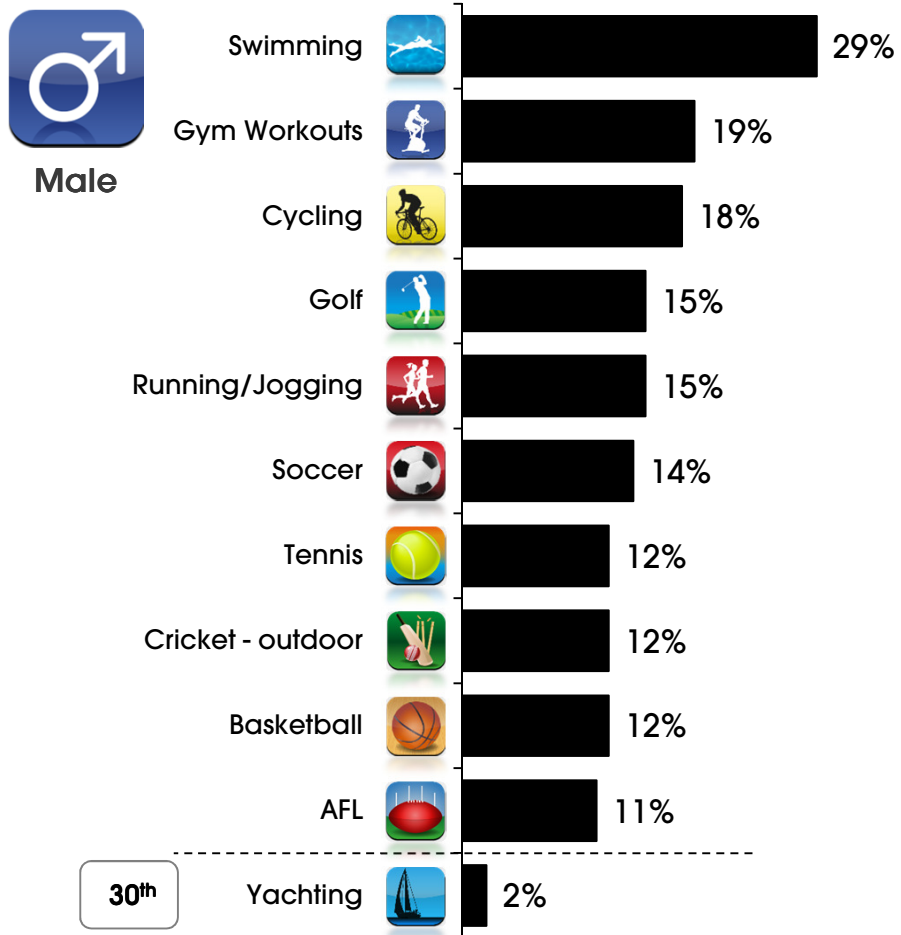
Base: All Australians Aged 5 to 75; n=14971



1.2 Participation Rate in Sports – Past 12 Months (by Gender)



Total Population by Gender – Top 10 Sports



Q. Which of these activities have you participated in the past 12 months?

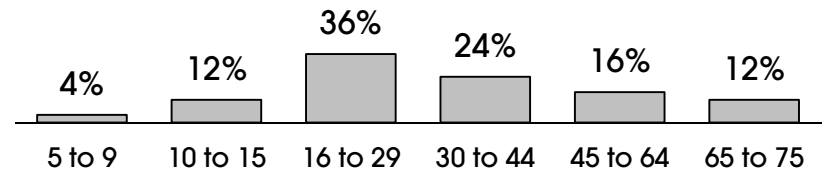
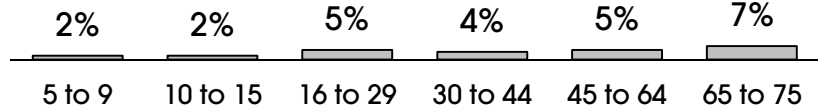
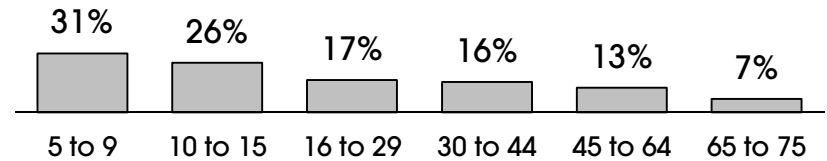
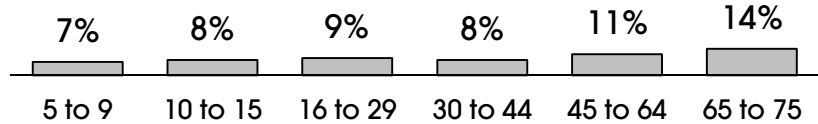
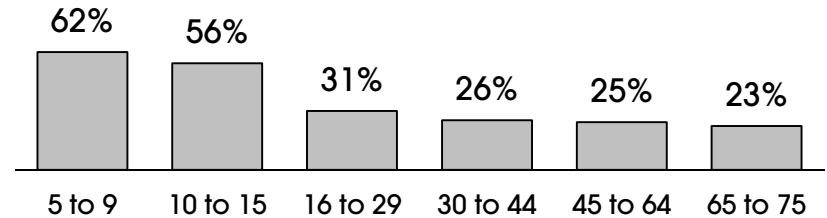
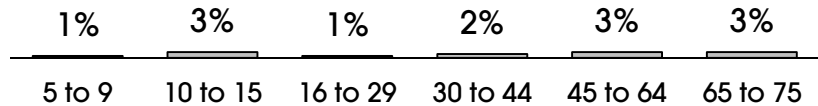
Base: All Australians Aged 5 to 75; n=14971



1.3 Participation Rate in Sports – Past 12 Months (by Age)



Total Population by Age – Yachting vs. Competitive Sports



Q. Which of these activities have you participated in the past 12 months?

Base: All Australians Aged 5 to 75; n=14971





1.4 Participation Rate in Yachting - Past 12 Months

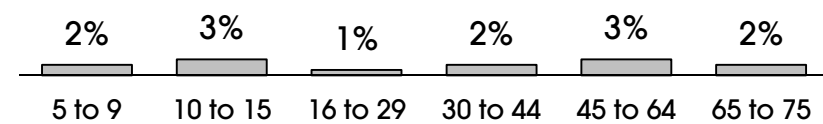
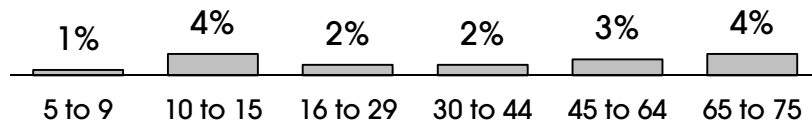
Total Population - Age by Gender



Male



Female



Q. Which of these activities have you participated in the past 12 months?

Base: All Australians Aged 5 to 75; n=14971

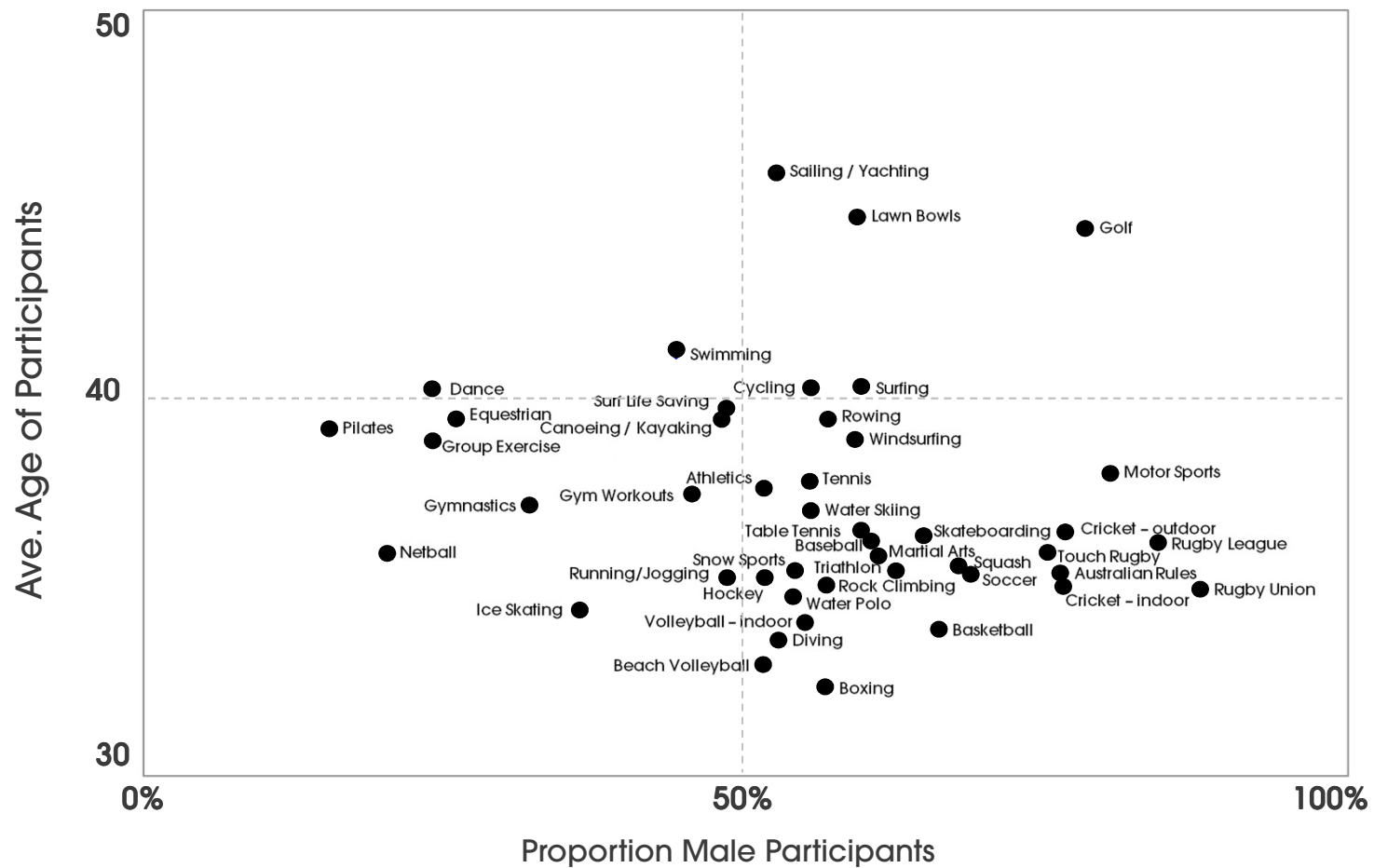


gemba



1.5 Participation Rate in Sports – Past 12 Months

Total Population – Average Age by Gender



Q. Which of the following sports have you participated in during the last 12 months?

Base: All Australians Aged 5-75; n=14971

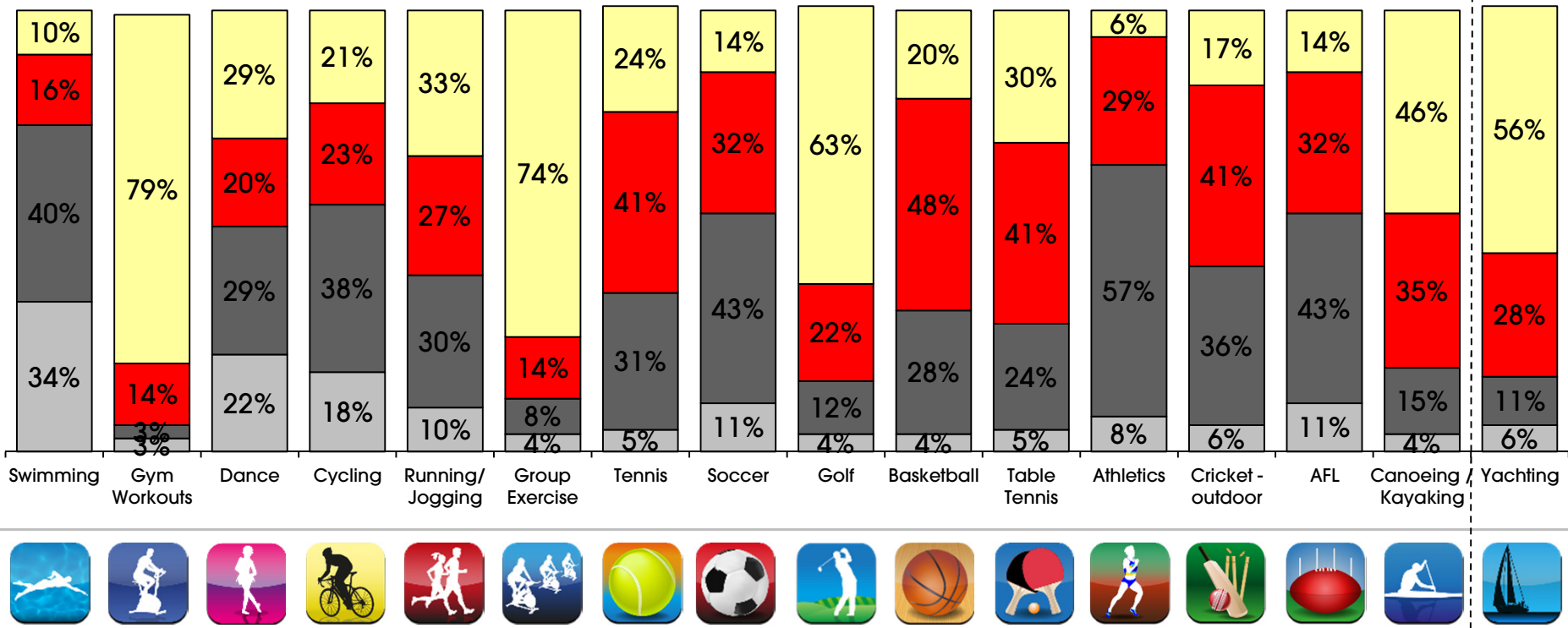


1.6 Age First Started Participating



Sports Participants – Top 15 Participated Sports

Note: Ranked by % participants first started below age of 5



Q. At what age did you first start participating in each of these sports?

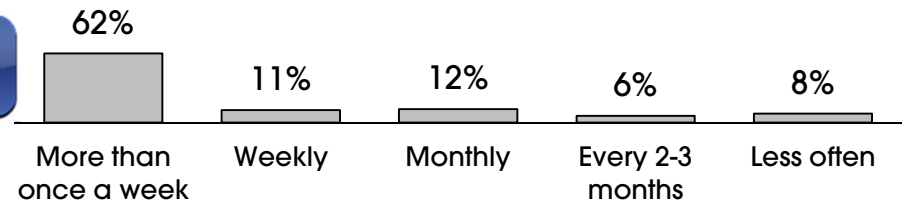
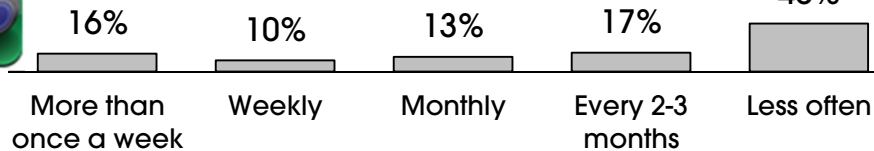
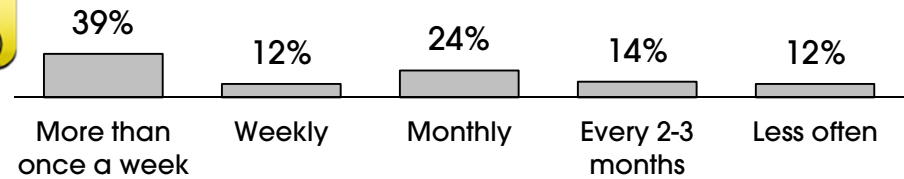
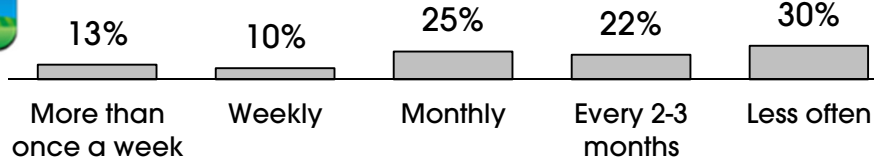
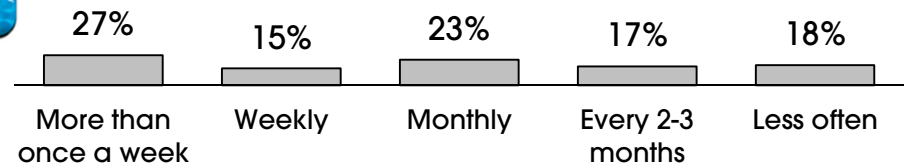
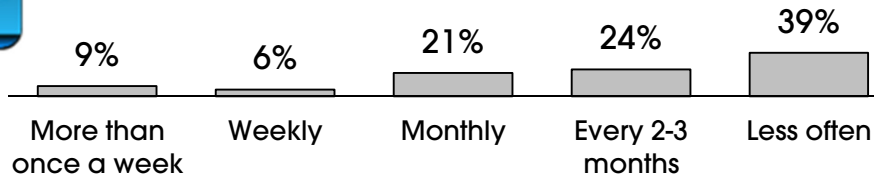
Base: Sports Participants; n=12470





1.7 Frequency of Participation in Sports – Past 12 Months

Sports Participants – Yachting vs. Competitive Sports



Q. During the past 12 months, how frequently did you usually participate in these sports?

Base: All Australians Aged 5 to 75; n=14971

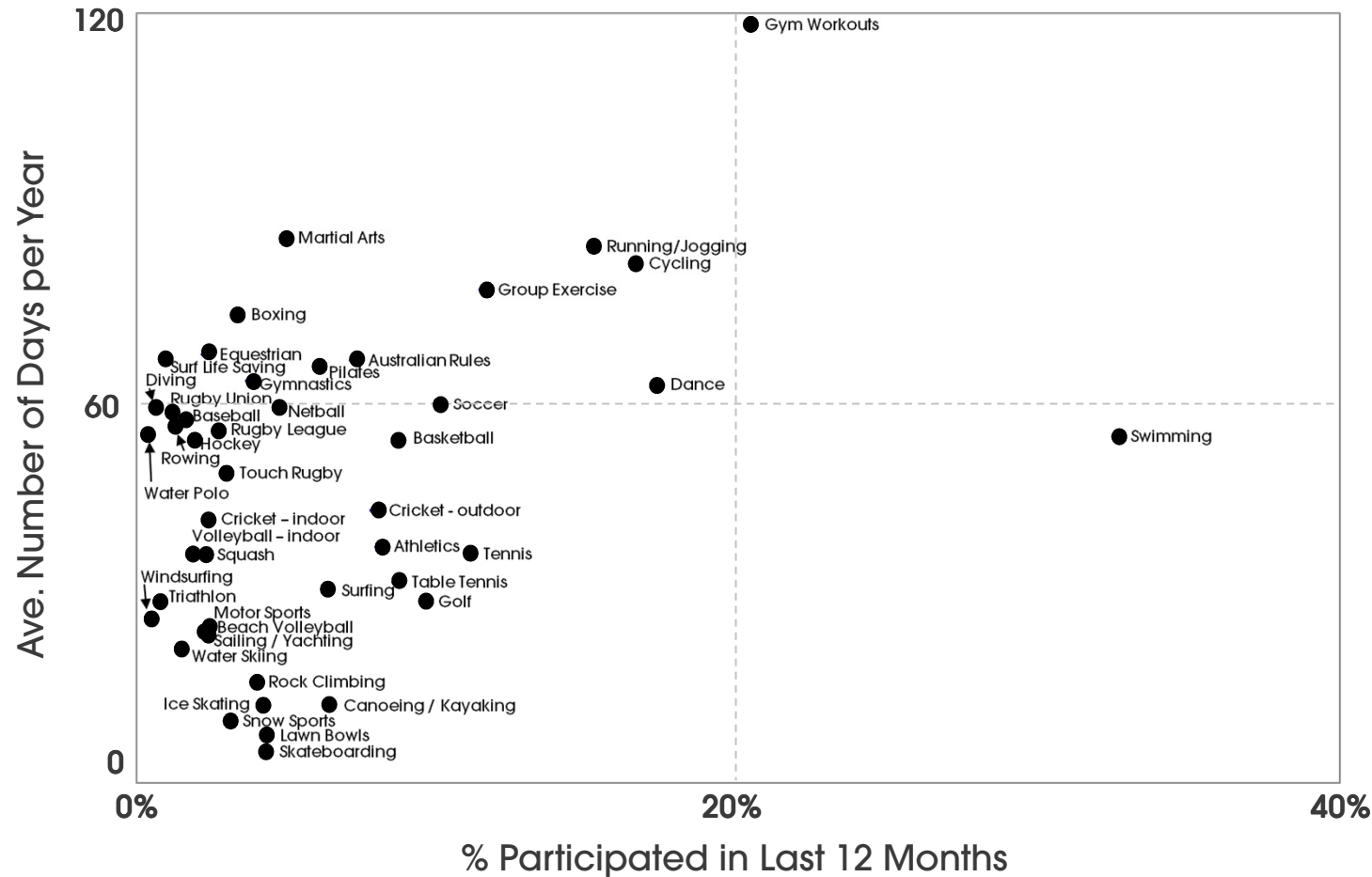


gemba



1.8 Participation Rate by Frequency – Total Population

Total Population – Participation Rate by Frequency



Q. Which of the following sports have you participated in during the last 12 months?
 Q. During the past 12 months, how frequently did you usually participate in these sports?

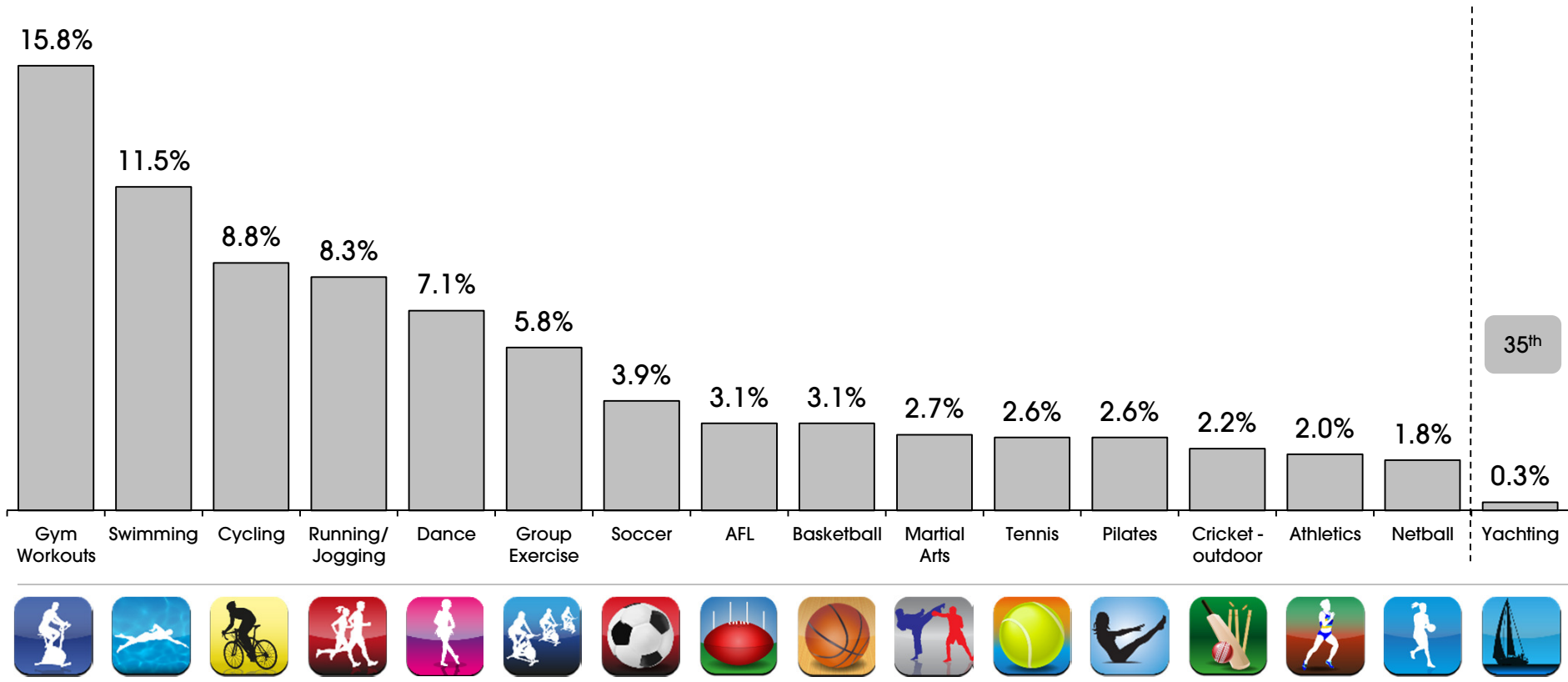
Base: All Australians Aged 5 to 75; n=14971





1.9 Sports Market Share

Total Population – Top 15 Sports



Q. Which of the following sports have you participated in during the last 12 months?
 Q. During the past 12 months, how frequently did you usually participate in these sports?

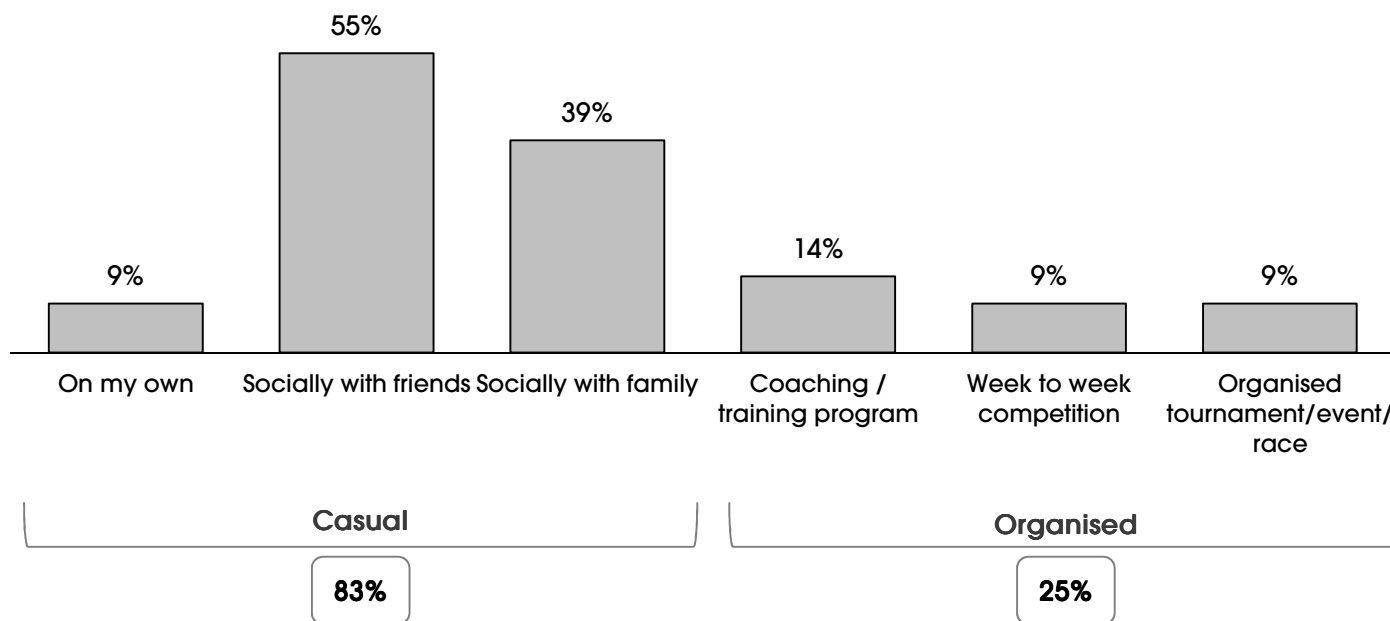
Base: All Australians Aged 5 to 75; n=14971



1.10 Nature of Yachting Participation



Participated in Yachting in Last 12 Months



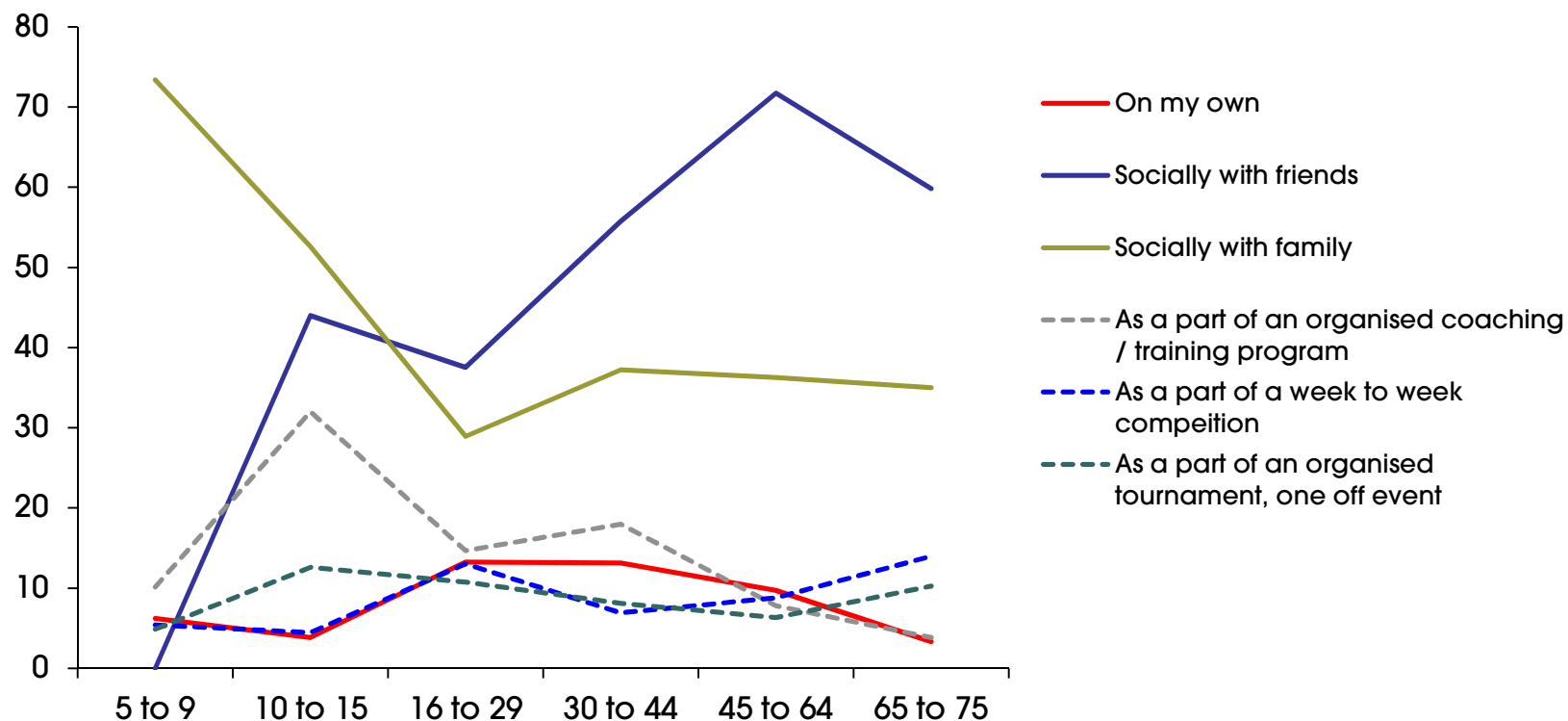
Q. During the last 12 months, what was the nature of your participation in these sports or forms of exercise?

Base: Participated in Yachting in last 12 months; n=360



1.11 Nature of Yachting Participation (by Age)

Participated in Yachting in Last 12 Months by Age



Q. During the last 12 months, what was the nature of your participation in these sports or forms of exercise? (multiple option)

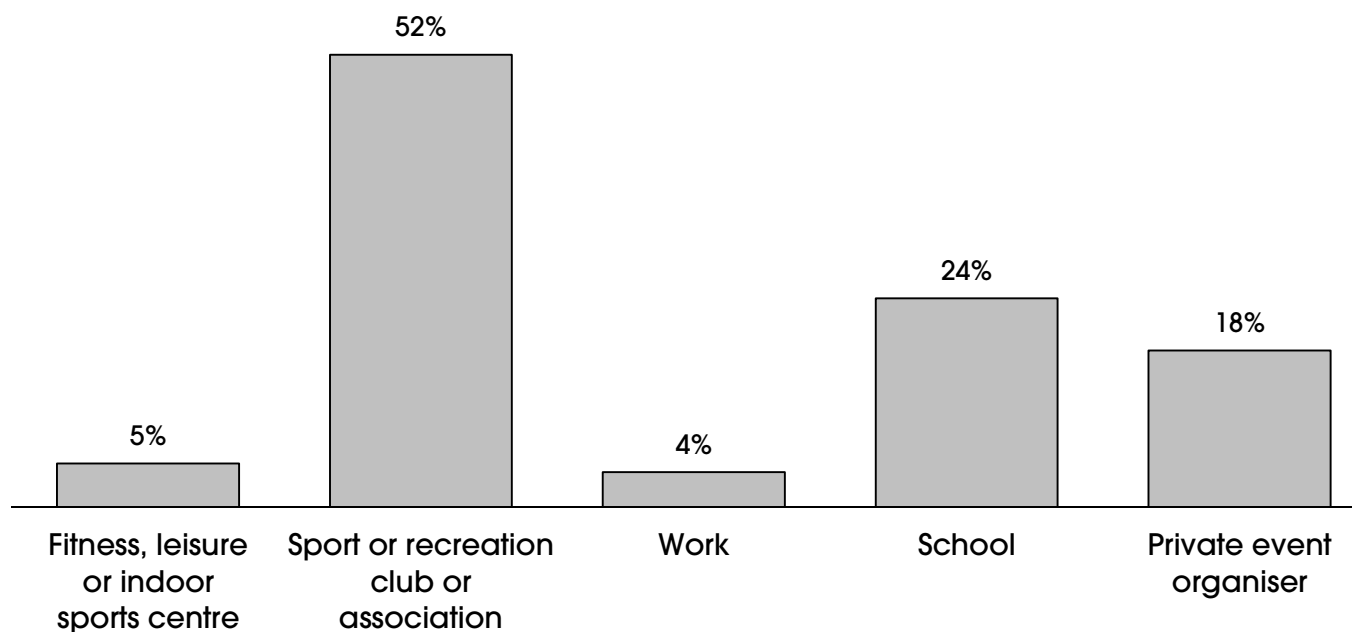
Base: Participated in Yachting in last 12 months; n=360



1.12 Nature of Organised Yachting Participation



Participated in Organised Yachting in Last 12 Months



Q. What type of club, association or organisation provided that program, competition or event?

Base: Participated in Organised Yachting in last 12 months; n=90

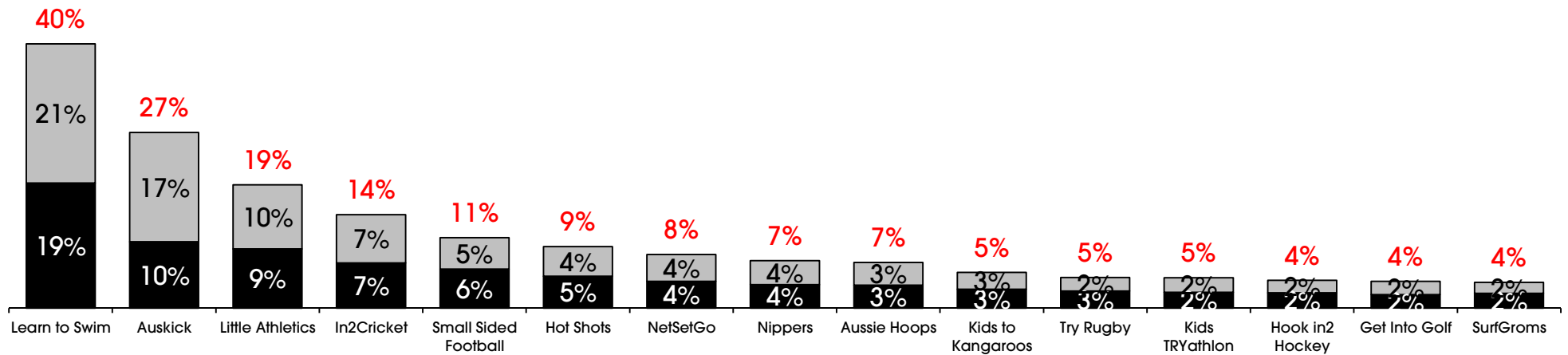


1.13 Claimed Participation in Junior Development Programs



Parents of Children Aged 5 to 15 Years

■ Participated in last 12 months □ Participated in more than 12 months ago



Q. In which of the following ways has your child been involved (if at all) in the following organised sporting/coaching program?

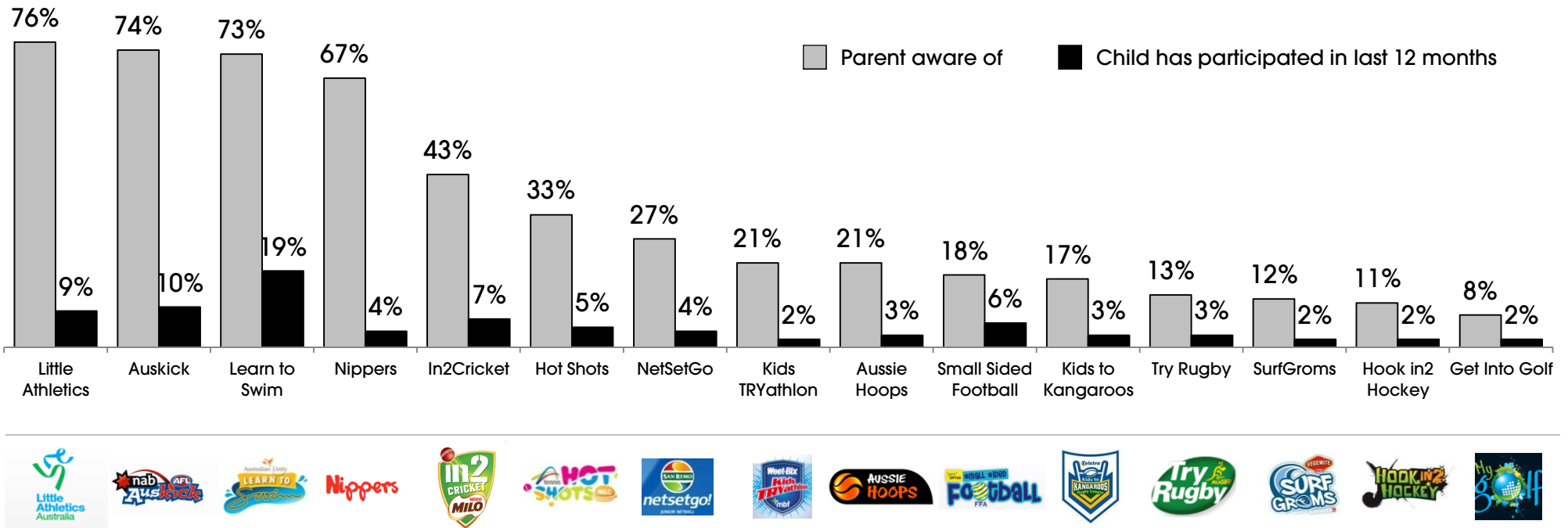
Base: All Parents of Children Aged 5-15; n=2595



1.14 Awareness & Claimed Participation in Junior Programs



Parents of Children Aged 5 to 15 Years



Q. Which of the following junior organised sporting/coaching programs are you aware of?
 Q. Which of the following junior organised sporting/coaching programs have your child participated in?

Base: All Parents of Children Aged 5-15; n=2595

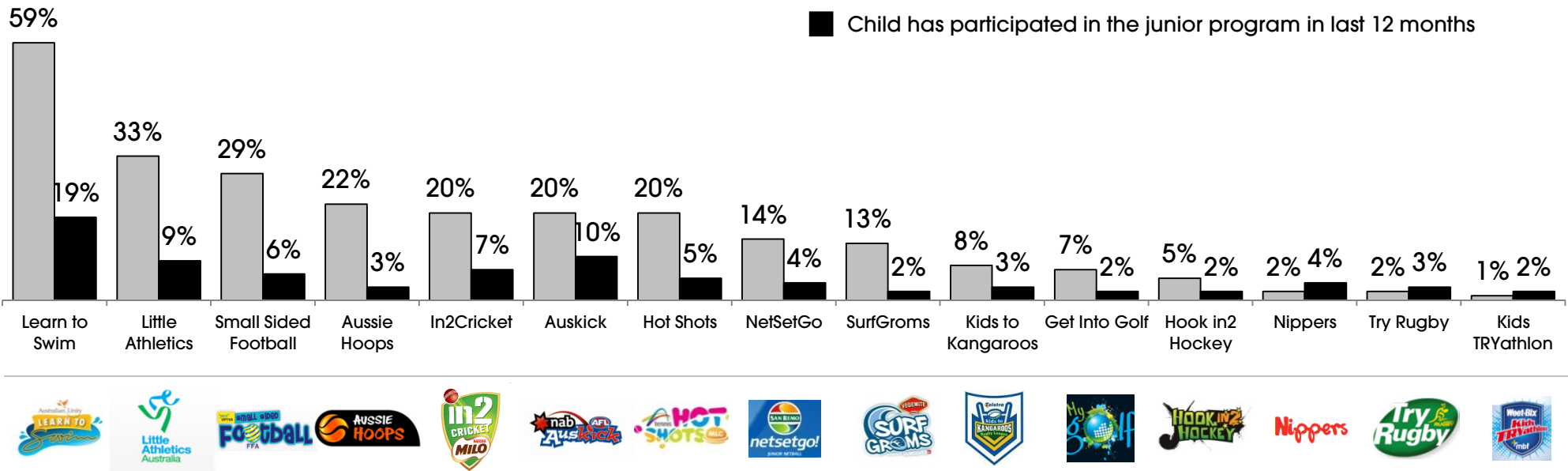




1.15 Claimed Participation in Sports and Junior Programs

Parents of Children Aged 5 to 15 Years

Child has participated in the sport in last 12 months
 Child has participated in the junior program in last 12 months



Q. Which of the following junior organised sporting/coaching programs have your child participated in?

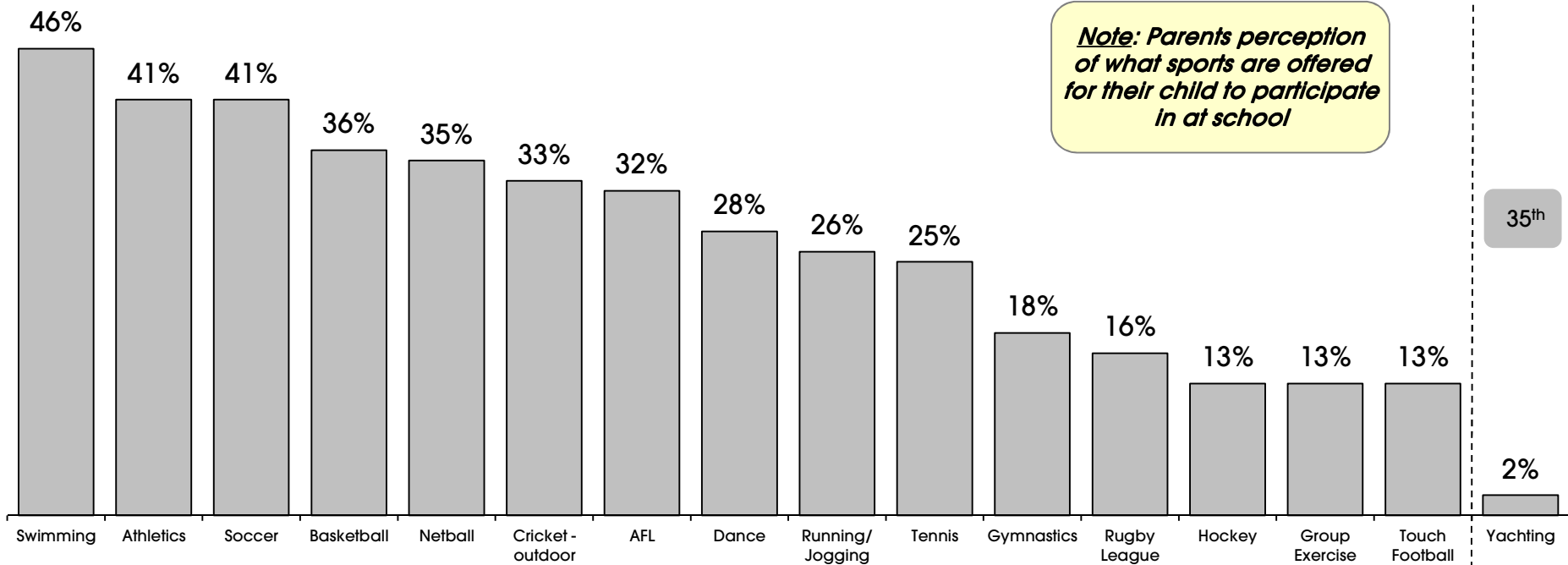
Base: All Parents of Children Aged 5-15; n=2595





1.16 Claimed Availability of Sports in School

Parents of Children Aged 5 to 15 Years – Top 15 Sports



Q. Which of the following sports or forms of exercise are offered for your child to participate in at your child's school?

Base: All Parents of Children Aged 5-15; n=2595





Yachting Report

SECTION 2 MARKET SIZE

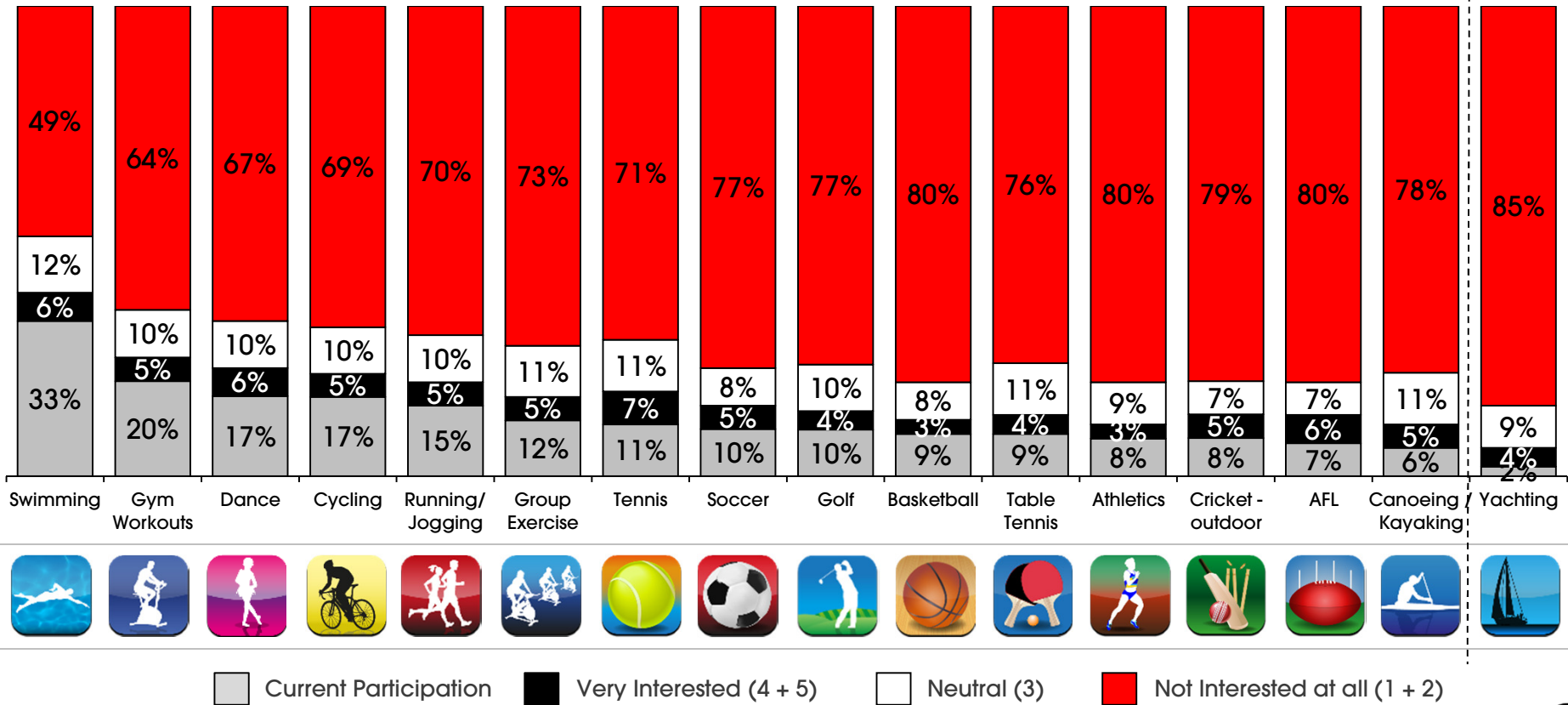




2.1 Interest in Sports Participation – Next 12 Months

Total Population – Top 15 Sports

Ranked by current participation →



Q. Please indicate your level of interest in participating for each of the sports with the next 12 months? 5=Very; 1=Not at all

Base: All Australians Aged 5 to 75; n=14971

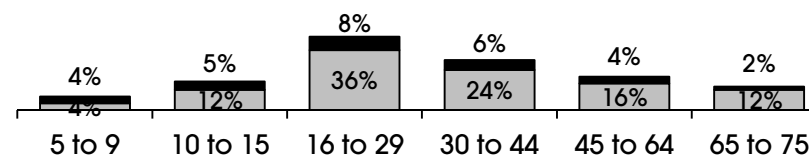
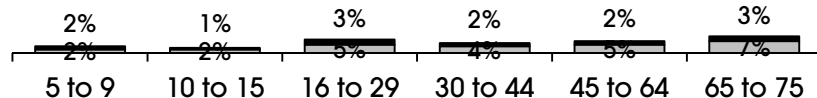
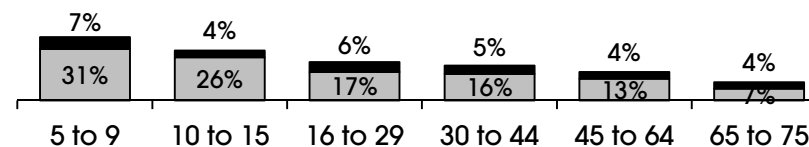
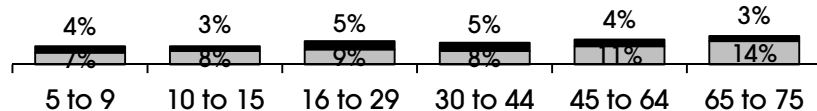
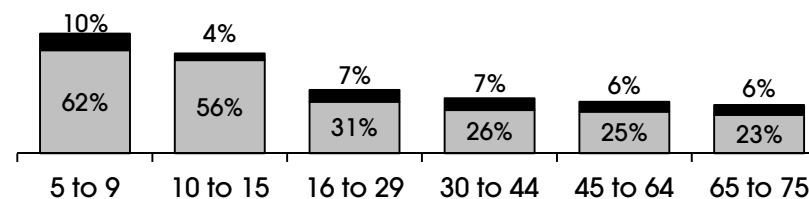
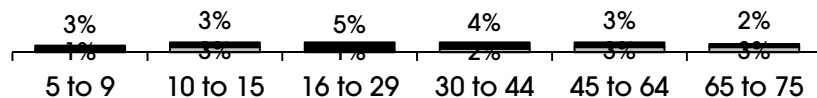


2.2 Interest in Sports Participation – Next 12 Months (by Age)



Total Population by Age – Yachting vs. Competitors

Current Participation
 Very Interested (4 + 5)



Q. Please indicate your level of interest in participating for each of the sports with the next 12 months? 5=Very; 1=Not at all

Base: All Australians Aged 5 to 75; n=14971





2.3 Interest in Yachting Participation – Next 12 Months

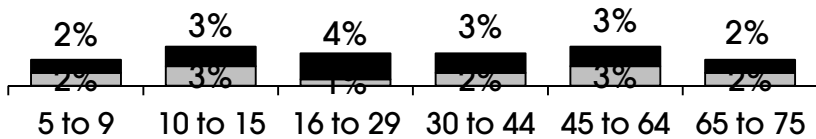
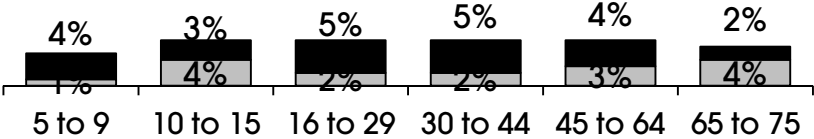
Total Population – Age by Gender



Male



Female



Current Participation
 Very Interested (4 + 5)

Q. Please indicate your level of interest in participating for each of the sports with the next 12 months? 5=Very; 1=Not at all

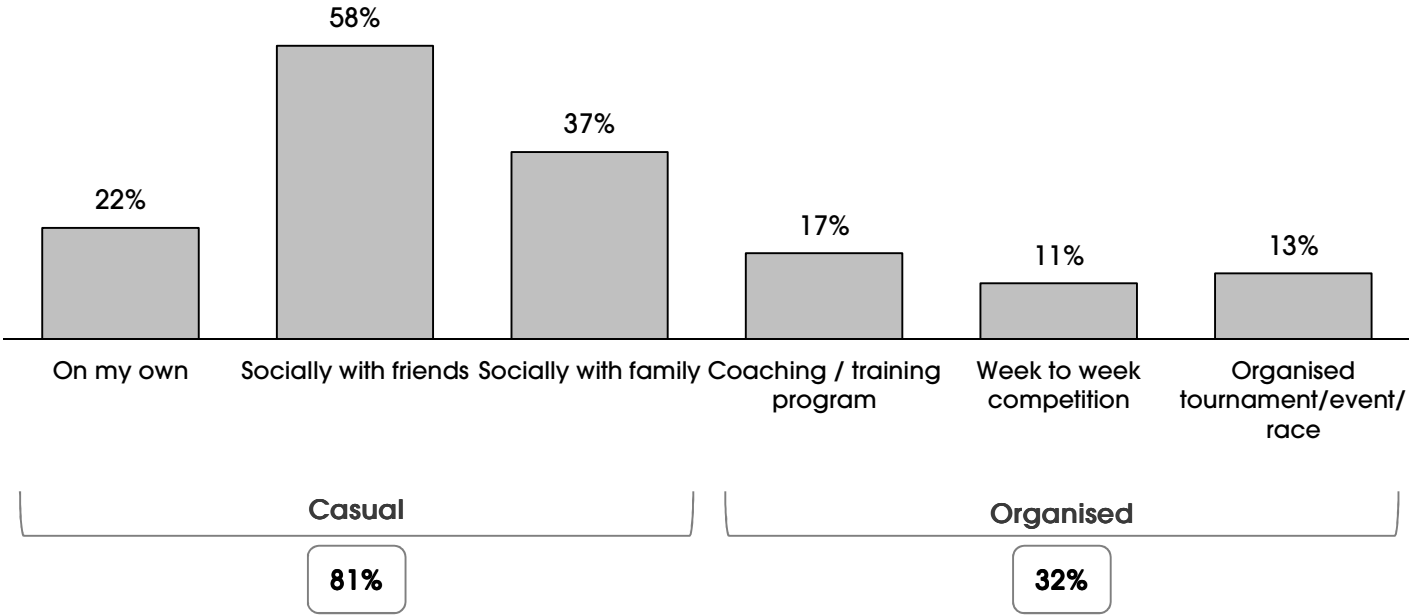
Base: All Australians Aged 5 to 75; n=14971





2.4 Nature of Interest in Yachting Participation – Next 12 Months

Interested in Yachting Participation in Next 12 Months



Q. What are all the ways in which you would want to participate in these sports?

Base: Interested in Yachting Participation; n=551





Yachting Report

SECTION 3 MOTIVATIONS & BARRIERS

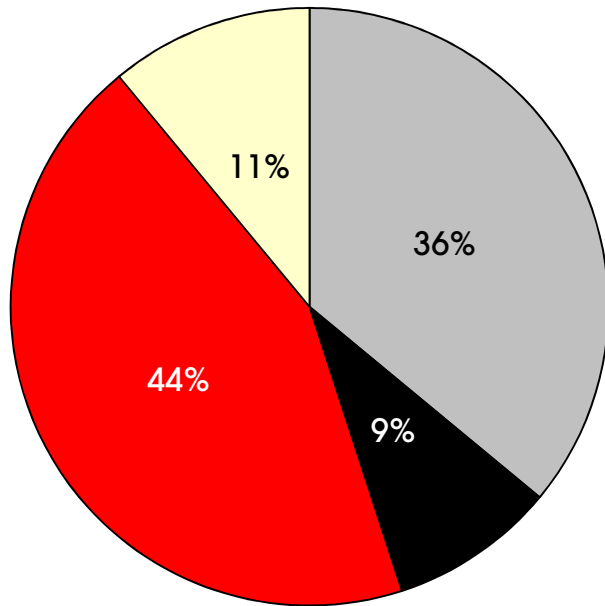




3.1 Motivations to Participate in Yachting

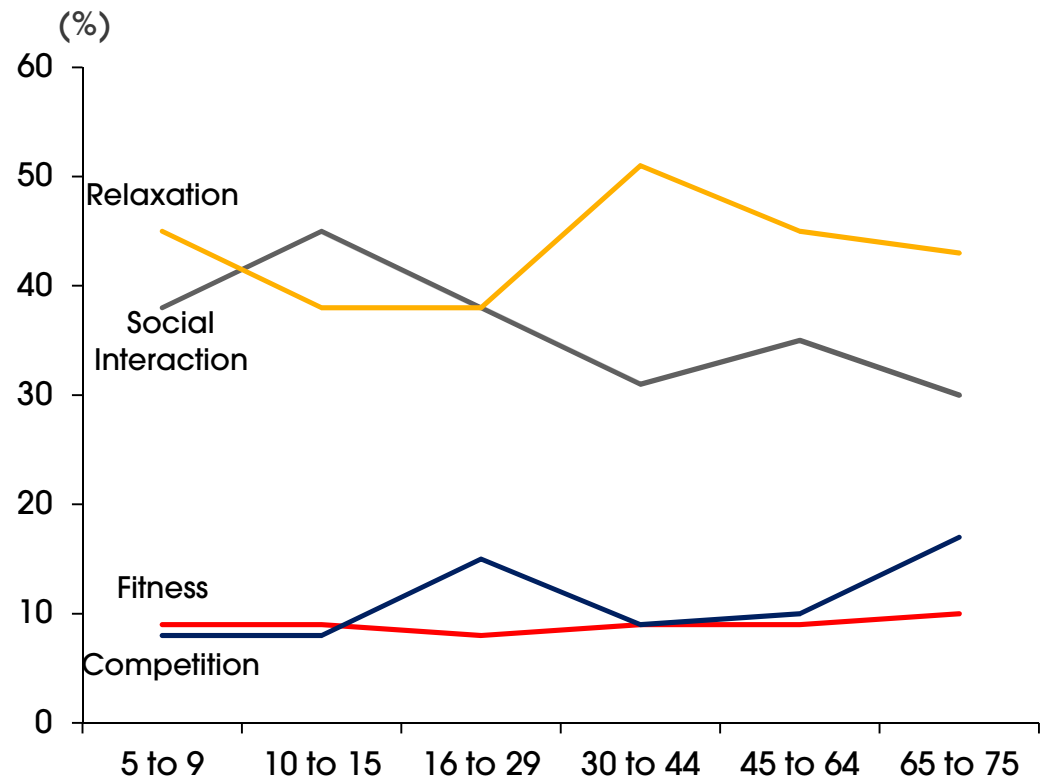
Participated in Yachting in Last 12 Months

Overall Total Population



Social
 Fitness
 Relaxation
 Competition

Motivation by Age



Base: Participated in Yachting in Last 12 Months; n=360

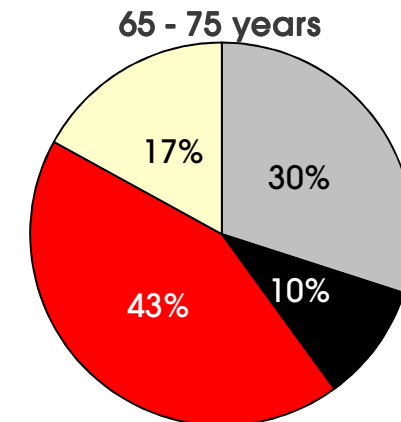
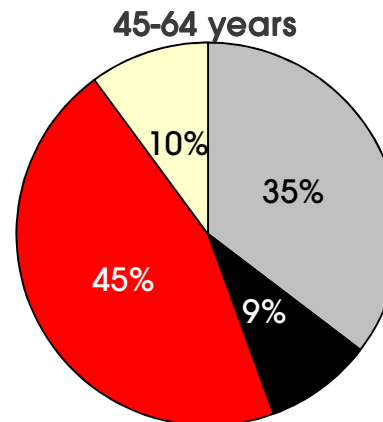
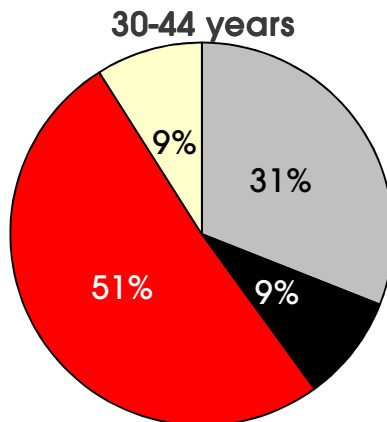
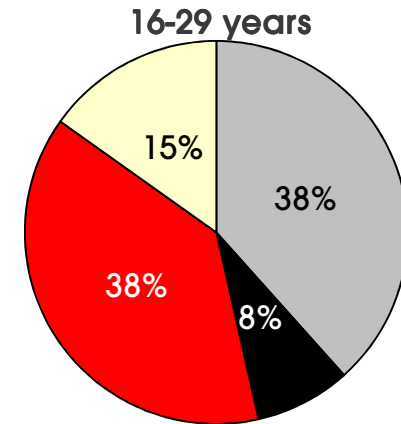
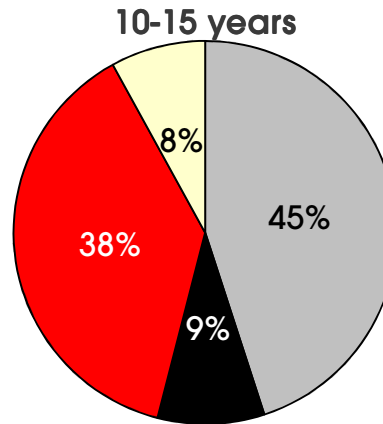
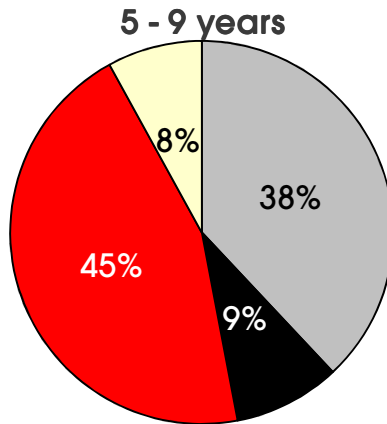


Q. How important are each of these things to why participate in each of these sports?



3.2 Motivations to Participate in Yachting (by Age)

Participated in Yachting in Last 12 Months



■ Social ■ Fitness ■ Relaxation ■ Competition

Q. How important are each of these things to why participate in each of these sports?

Base: Participated in Yachting in Last 12 Months; n=360



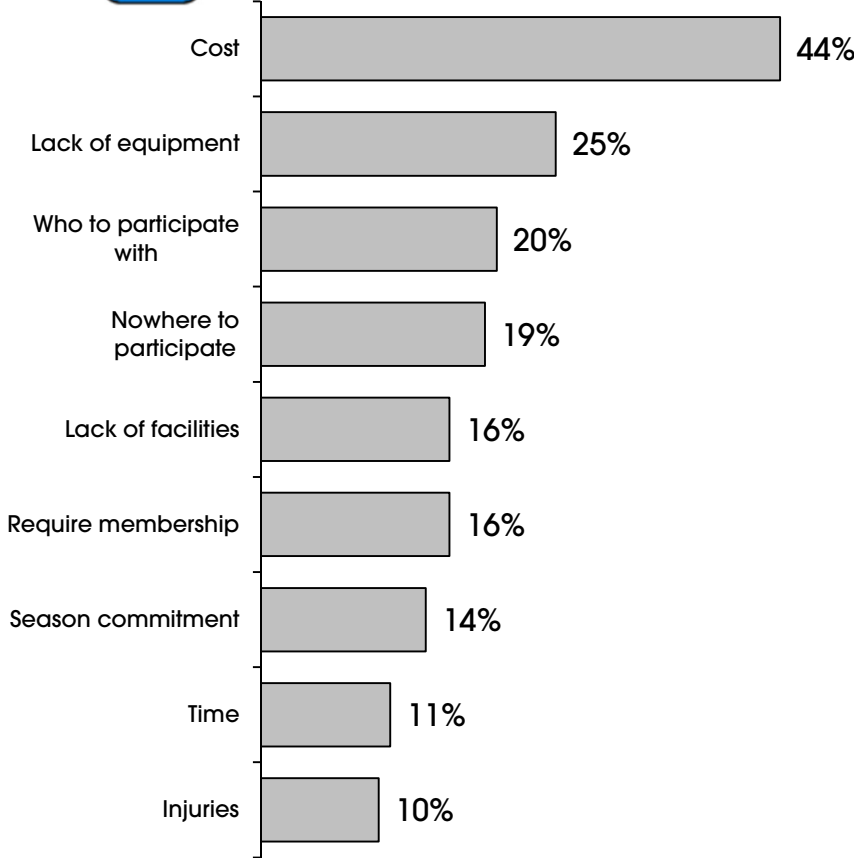


3.3 Barriers to Participating in Sport

Interested in Participation in Next 12 Months – Yachting vs. Competitive Sports



Yachting – Top 10 Barriers



Other Sports – Top 3 Barriers

#1 Barrier	#2	#3
Cost	Who to participate with	Lack of equipment
Who to participate with	Cost	Season commitment
Cost	Season commitment	Injuries
Cost	Lack of equipment	Who to participate with
Cost	Require membership	Injuries

Q. Which of the following create barriers to you starting to participate in that sport?

Base: Interested in Participation in Yachting in Next 12 Months n=551

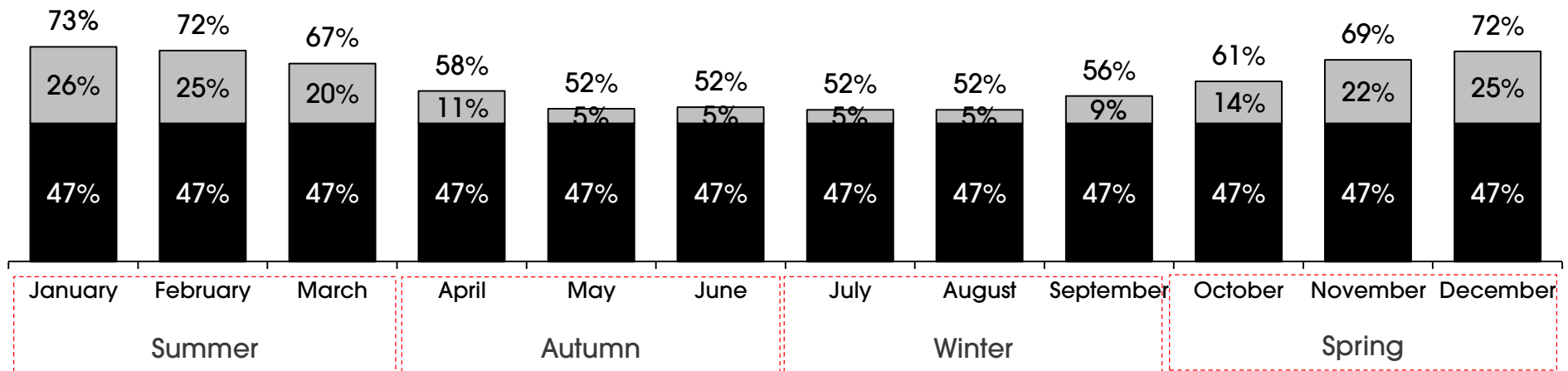




3.4 Preferred Time of Year to Participate in Yachting

Interested in Participation in Yachting in Next 12 Months

■ All year round □ Month-specific



Q. What would be your preferred time of year to participate in each of the following sports?

Base: Interested in Participation in Yachting in Next 12 Months n=551





Yachting Report

SECTION 4 RETENTION



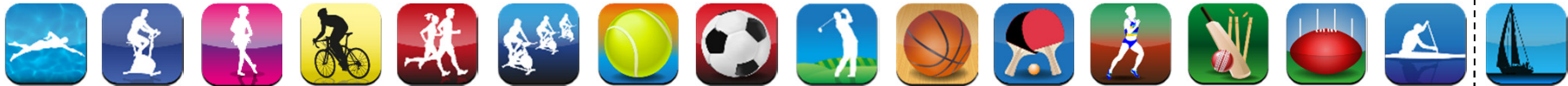
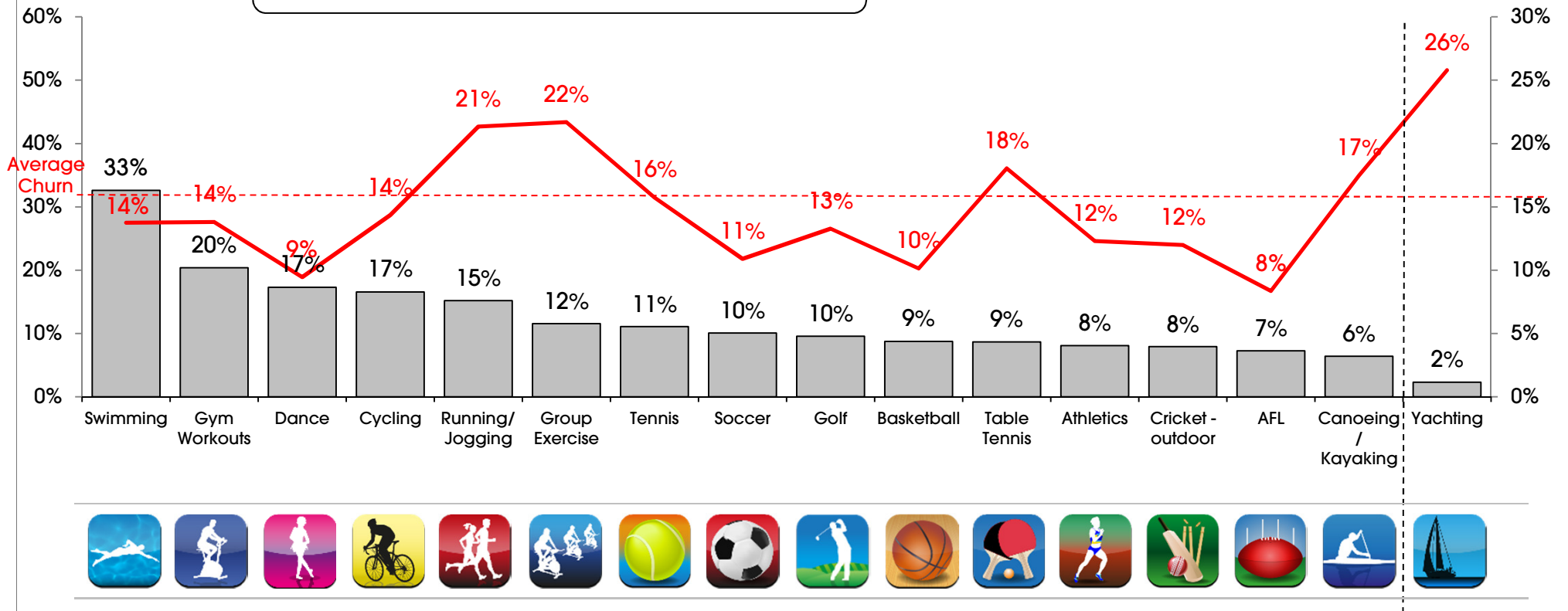


4.1 Sports Participation & Churn Rates – Past 12 Months

Total Population Aged 5 to 75

Churn = $\frac{\text{Number who ceased participation in the past 12 months}}{\text{Number participated in P12M}}$

■ Participation Rate — Churn Rate



- Q. Which of the following sports have you participated in during the last 12 months?
- Q. Which of the following sports have you ever participated in?

Base: All Australians Aged 5-75; n=14971



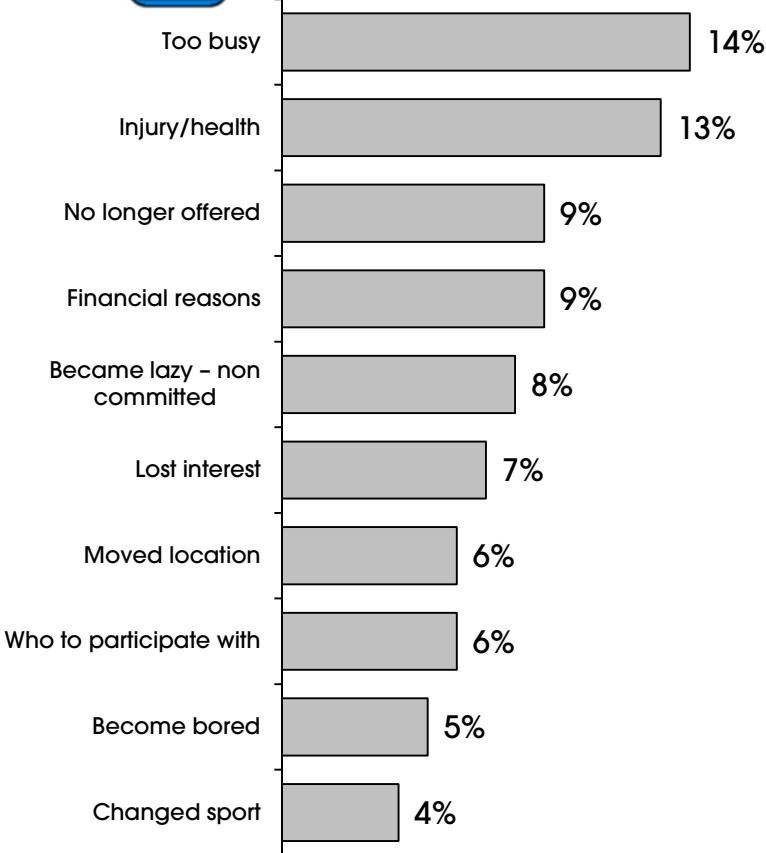


4.2 Reason Stopped Participation

Stopped Participating in Last 4 Years – Yachting vs. Competitive Sports



Yachting – Top 10 Reasons



Other Sports – Top 3 Reasons



#1 Barrier	#2	#3
Too busy	Injury/health	Become bored
Too busy	Become bored	Lost interest
Too busy	Became lazy – non committed	Injury/health
Too busy	Injury/health	Became lazy – non committed
Too busy	Injury/health	Financial reasons

Q. For the following sports that you have stopped participating in during the last 4 years, from the list select the main reason why you stopped participation in that sport?

Base: Stopped Participating in Yachting in Last 4 Years; n= 238





Yachting Report

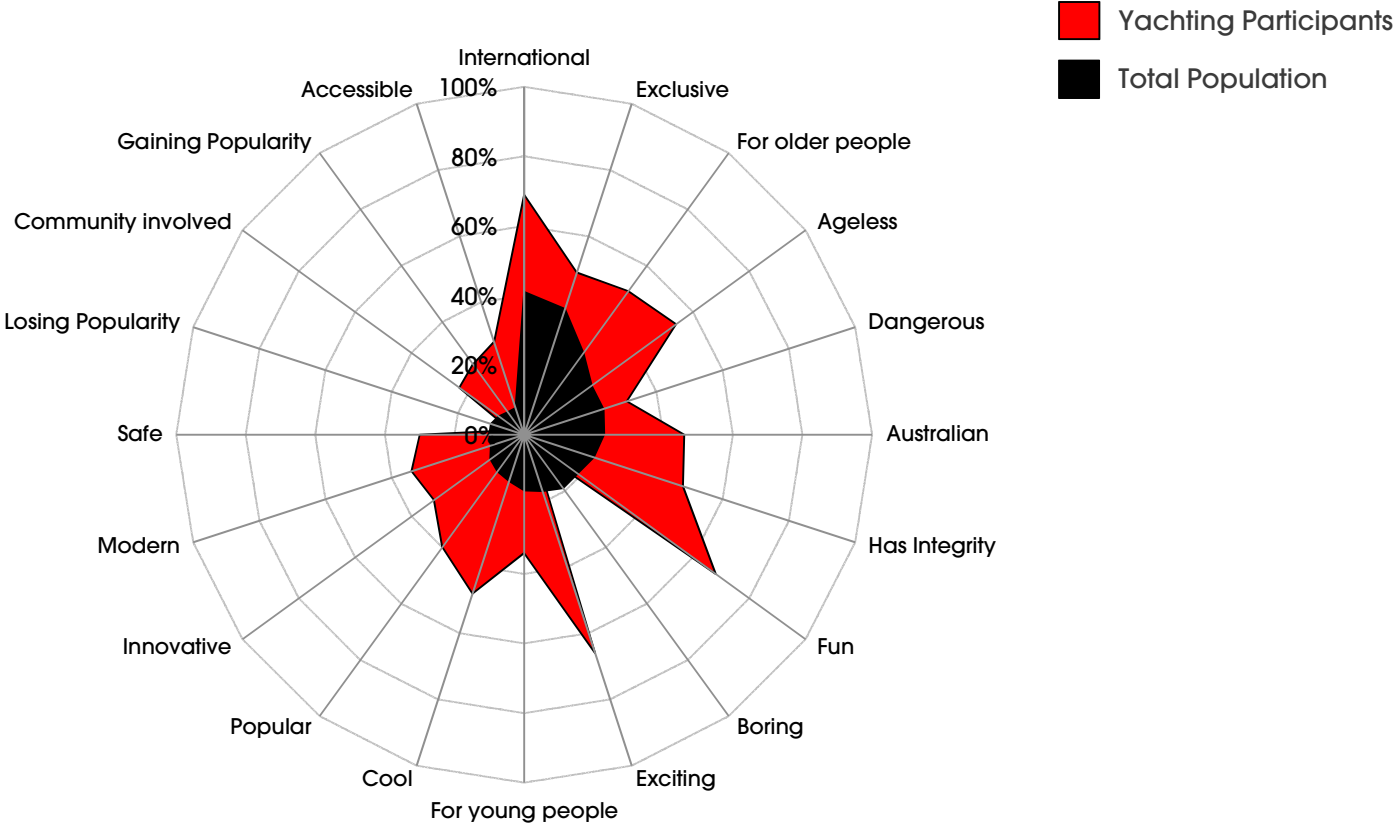
SECTION 5 IMAGE PERCEPTIONS





5.1 Yachting Participation Imagery

Total Population vs. Yachting Participants



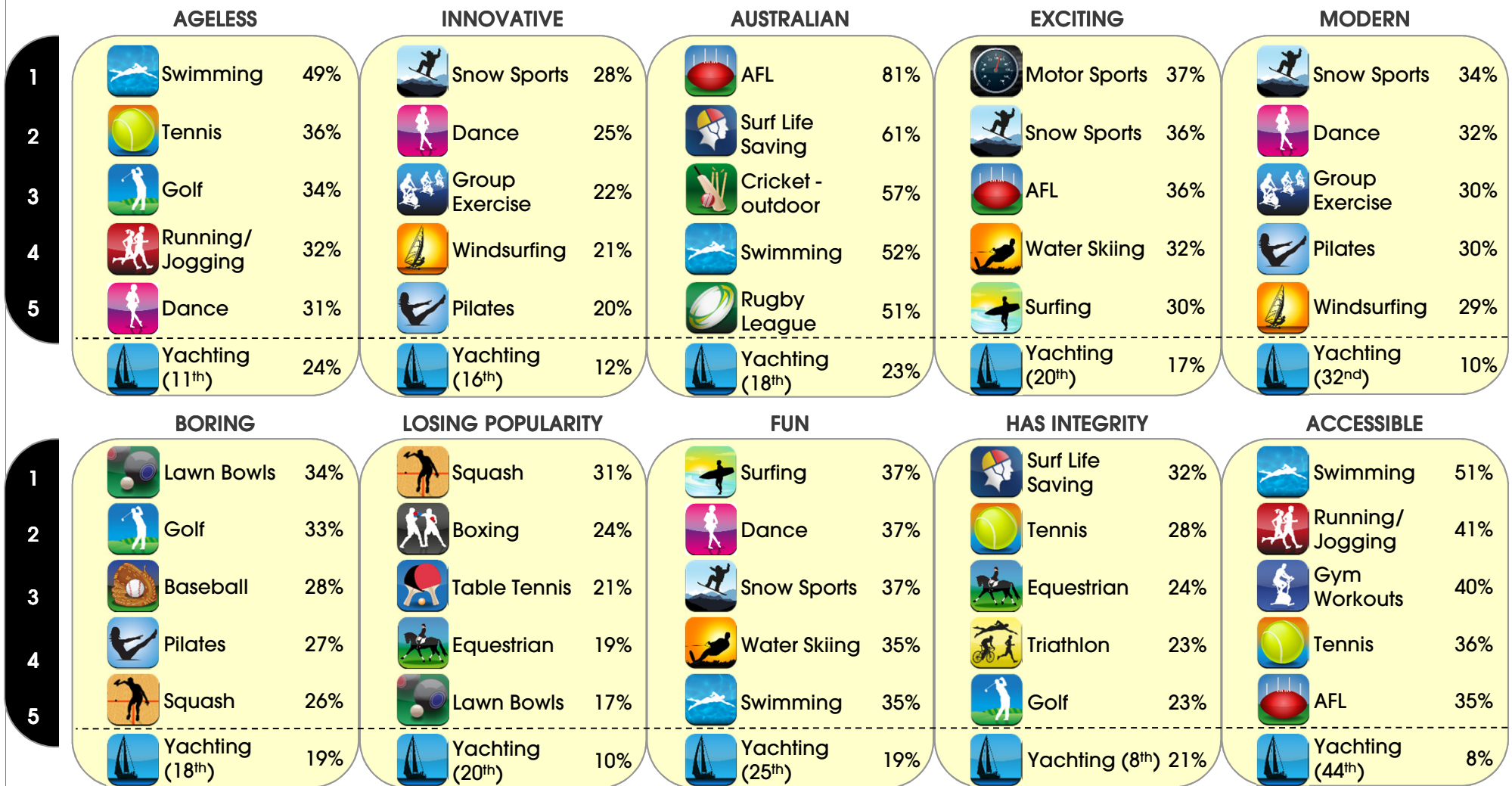
Q. Please indicate which of these sports or forms of exercise you associate with each of the statements shown below from the perspective as a sport to participate in?

Base: All Australians Aged 5 to 75; n=14971
Base: Yachting Participants (P12M); n=360





5.2 Participation Imagery – Total Population – Top 5

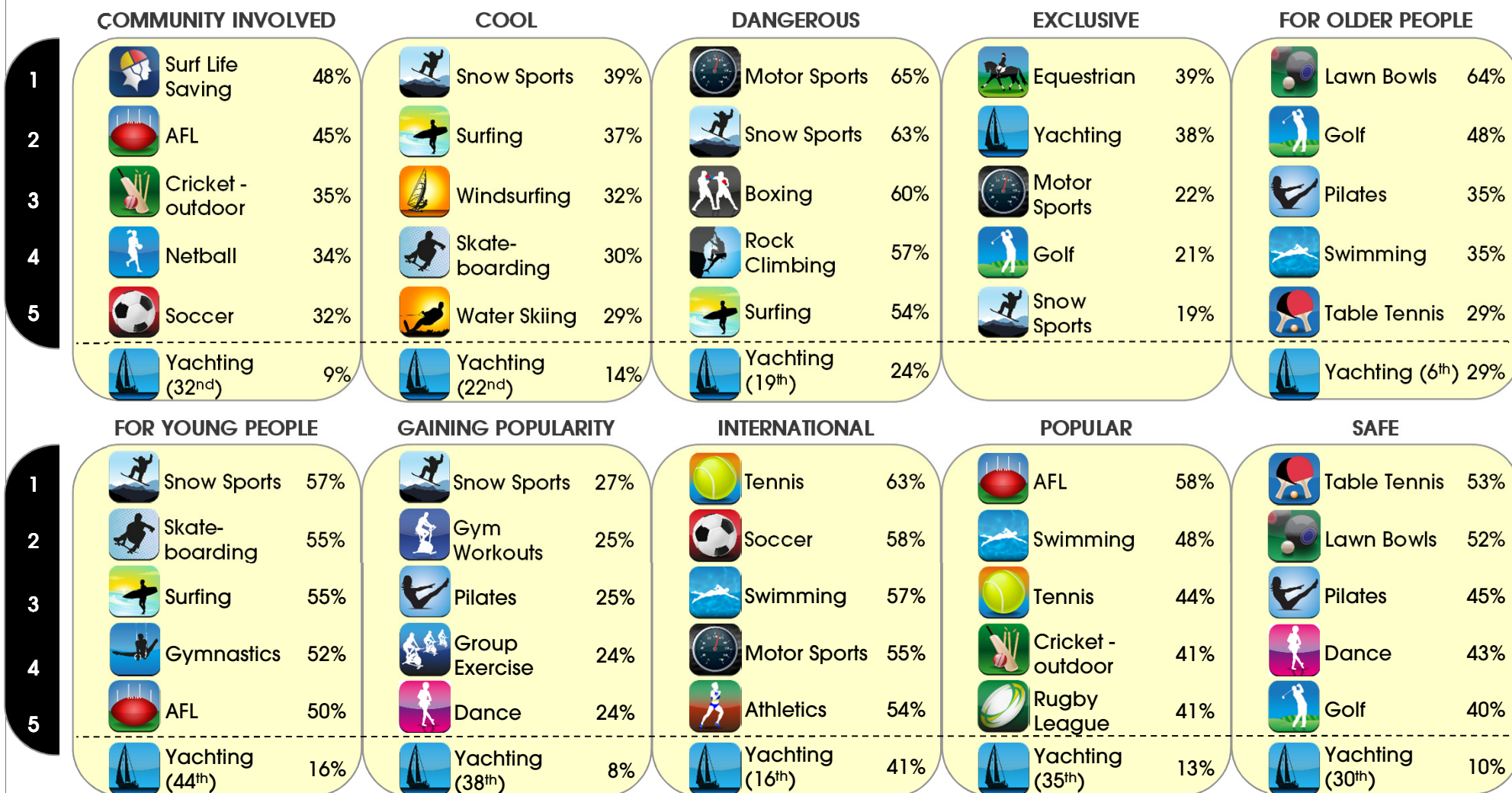


Q. Which of these sports do you associate with each of the statements?

Base: All Australians Aged 5 to 75; n=14971



5.2 Participation Imagery – Total Population – Top 5



Q. Which of these sports do you associate with each of the statements?

Base: All Australians Aged 5 to 75; n=14971



Yachting Report

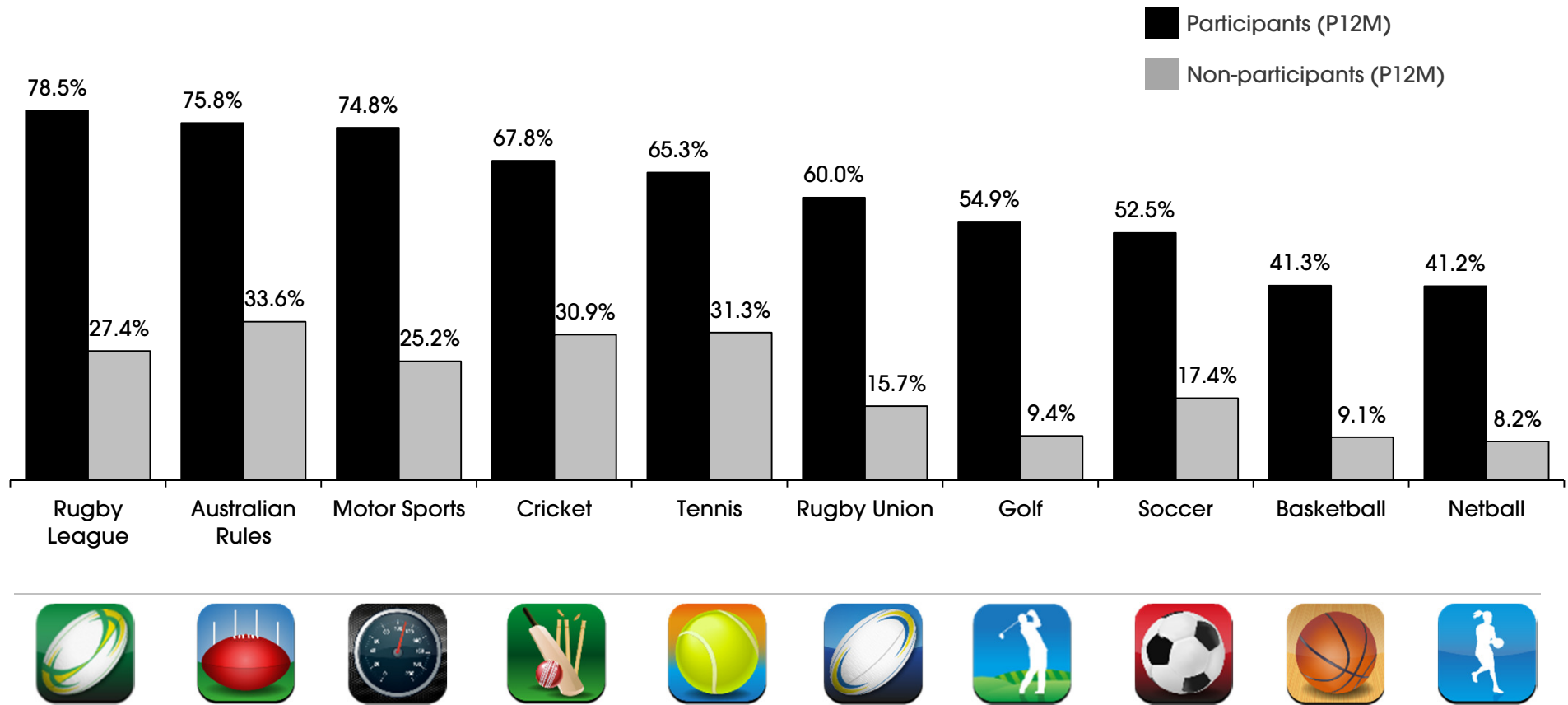
SECTION 6 COMMERCIAL IMPACT





6.1 Sports Occasionally or Regularly Watch on Television

Sports Participants vs. Non-Participants – Top 10 Sports



Q. Which of the following sports do you occasionally or regularly watch on TV?

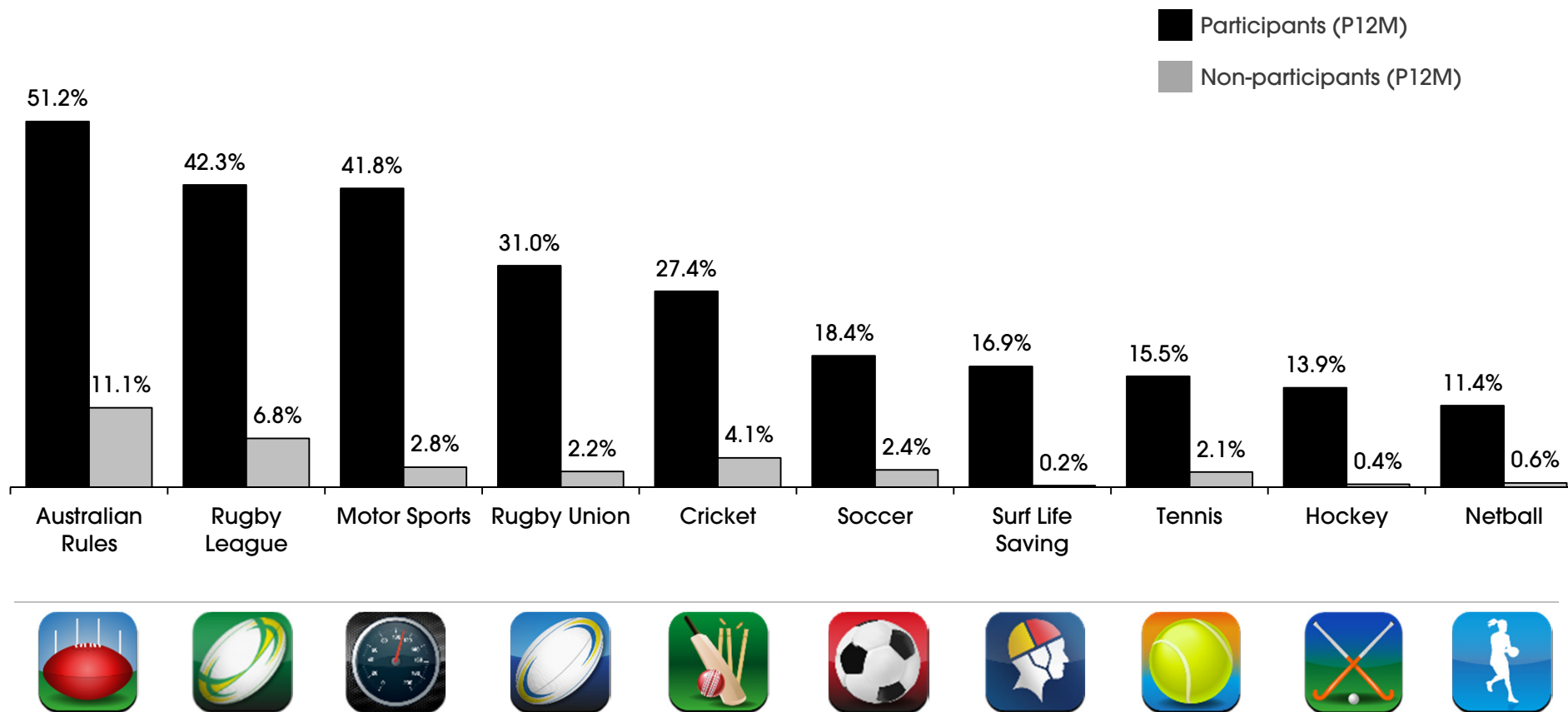
Base: All Australians Aged 5 to 75; n=14971

gemba



6.2 Professional Sports Attended – Last 12 Months

Sports Participants vs. Non-Participants – Top 10 Sports



Q. Which of the following professional sports have you attended on paid admission in the last 12 months?

Base: All Australians Aged 5 to 75; n=14971

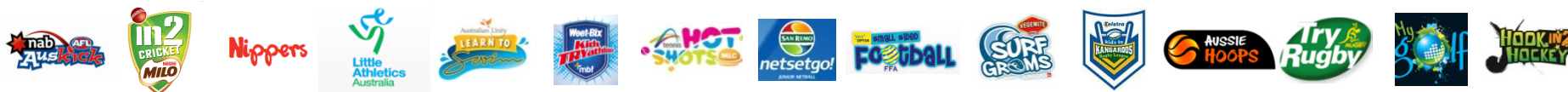
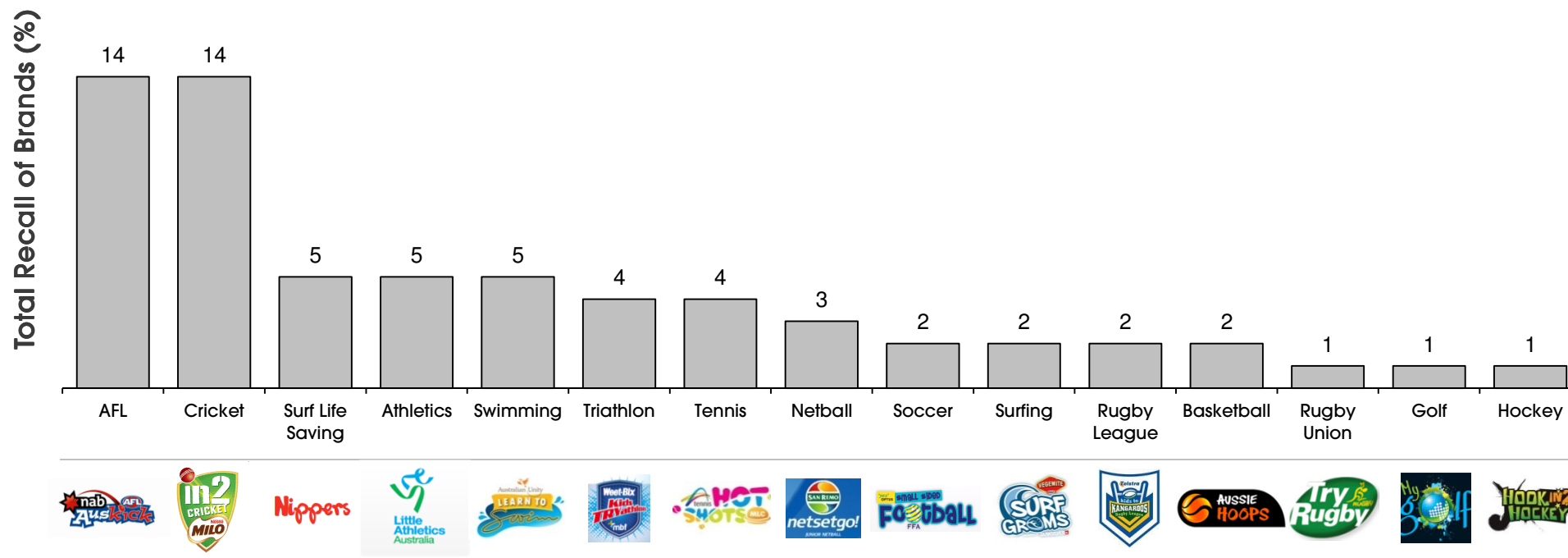


gemba



6.3 Awareness of Junior Development Program Sponsors

Parents of Children Aged 5 to 15



Q. Which sponsors or brands comes to mind for each of these junior sporting/coaching programs? (unprompted, 1st mention)

Base: Parents of Children Aged 5 to 15; n=2595





6.4 Sponsorship Share of Mind

Parents of Children Aged 5 to 15 – Top 15 Sponsor Recalled Sports

$$\text{Share of Mind} = \frac{\text{Sponsor Awareness}}{\text{Total Recall of Brands}}$$

Top Sponsor															
Sponsor Awareness	10.7%	11.4%	1.3%	2.5%	0.8%	2.3%	1.0%	0.8%	0.6%	0.4%	0.3%	0.6%	0.2%	0.3%	0.2%
Program	Auskick	In2Cricket	Nippers	Little Athletics	Learn to Swim	Kids TRYathlon	HotShots	NetSetGo	Small Sided Football	SurfGroms	Kids to kangaroos	Aussie Hoops	Try Rugby	MYGolf	Hook in2 Hockey
Sport	AFL	Cricket	Surf Life Saving	Athletics	Swimming	Triathlon	Tennis	Netball	Soccer	Surfing	Rugby League	Basketball	Rugby Union	Golf	Hockey
Total Recall of Brands	14.5%	13.6%	5.3%	4.9%	4.7%	4.3%	3.6%	3.1%	2.1%	2.1%	1.7%	1.6%	1.1%	1.1%	1.0%
Share of Mind	73.8%	83.9%	24.7%	51.9%	18.0%	53.7%	28.3%	24.8%	27.4%	18.4%	21.1%	34.7%	13.3%	27.3%	16.1%

Q. Which sponsor or brand comes to mind first for each of these junior sporting/coaching programs? (unprompted, 1st mention)

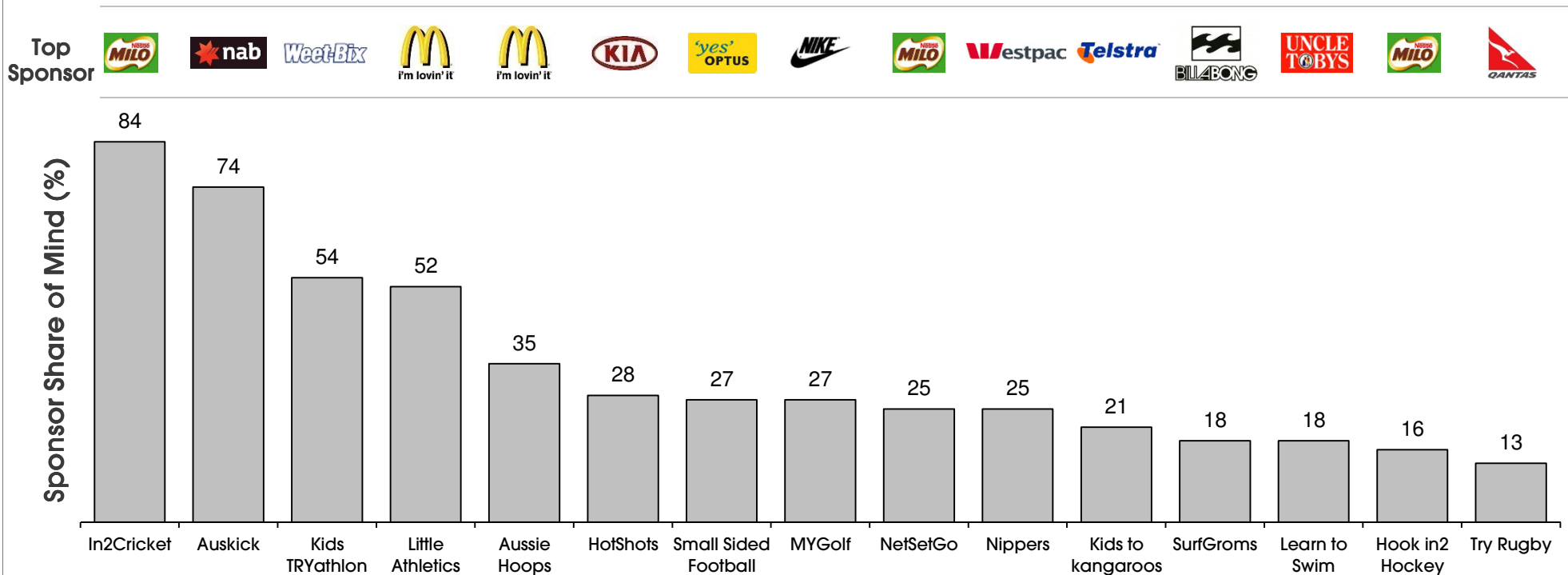
Base: Parents of Children Aged 5 to 15; n=2595





6.5 Top Sponsor Share of Mind

Parents of Children Aged 5 to 15 – Top 15 Sponsor Recalled Sports



Q. Which sponsor or brand comes to mind first for each of these junior sporting/coaching programs? (unprompted, 1st mention)

Base: Parents of Children Aged 5 to 15; n=2595



Contact Us

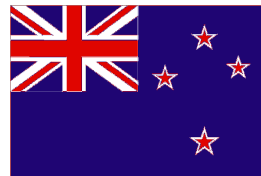


gemba Group Pty Ltd



Melbourne

Sydney



Auckland



Shanghai

t: +61 (03) 9526 5700

f: +61 (03) 9526 5799

e: info@gemba.com.au

