

ASC Community Perceptions Survey 2017

Research Report

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For: Australian Sports Commission (ASC)

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3 EXECUTIVE SUMMARY

Background

In 2017, the Australian Government is developing a National Sports Plan (the Plan) to understand Australia's expectations of the sports sector, including our shared goals for high performance sport; sporting participation; cultural and public health outcomes and our willingness to pay for these services, opportunity and success. In essence, the Plan, "will be a long-term strategy for the whole of sport and will examine four key pillars of participation, performance, prevention through physical activity, and integrity". A multi-level consultation approach is being undertaken to inform the future plan and strategy.

The research

To understand current community perceptions and values around sport, the Australian Sports Commission (ASC) commissioned Essence Communications to conduct a national survey. The survey sought to establish the Australian population's current perceptions of and importance of goals for high performance sport, sporting participation, cultural and public health outcomes and expectations of opportunity and success as well a current participation in physical activity and sport. The research involved an online survey recruiting from online research panels conducted in June 2017 with a nationally representative sample (based on age, gender and location) of n=3,541 Australians aged 18 years and above.

Key findings

It is evident that physical activity and sport are integral to Australian lives and the community, and the value of sport to the community and the country is evident – regardless of whether individuals are participants in sport. That said there is a gap between perceptions and participation, and sport continues to carry some perceptual barriers when it comes to participation for some individuals. Overall Australians, regardless of whether they are personally inclined or ambivalent to sport, DO support investment in sport – at a community level and for high performance / elite sports in regards to providing opportunities, talent development and investment in international events. Australians also expect to see Australia do well when competing internationally – and they believe that Australia is well regarded on the international sporting stage. Integrity is very important and compromised integrity will have consequences in terms of audiences and as well participation in the sport.

Communications to the Australian public around sporting goals and investment should focus on leveraging benefits to the community and country as a whole and it is important that the Government is seen to be championing this as Australians do see the Government to be a key regulator or have a role in intervention if required. Given the public are largely convinced about personal benefits (health, mental wellbeing) but relatively less so on how higher investment areas such as high performance sport and sporting facilities can directly benefit them, an area of communication can be around emphasising (or demonstrating) the direct flow on to individuals, economically, for participation or the social / cultural benefits.

This survey carries a wide range of data of interest to the ASC and for future consideration. When it comes to the development of the National Sports Plan in particular, we recommend these findings are triangulated with the other elements of intelligence gathering and consultation including from individuals, community groups, sporting organisations, businesses and government. The analysis of results suggests there are opportunities for the Plan to consider both program, policy and

communication strategies which will need to be consolidated with other findings from the consultation.

However, on the basis of this survey alone we make the following comments and recommendations about each of the four key pillars of the National Sports Plan:

With regards to the four pillars of interest...

Participation

While Australia is a nation that is keen to participate in sport, we know that there remains a number of barriers in place that affect participation.

The research identified both barriers and opportunities to increase physical activity in Australia:

- The perceived importance of sport for adults is lower than that of general physical activity (58% vs. 81%)
- The perceived importance of sport for children is higher than for adults (77% vs. 58%)
- Three in ten (29%) are not doing any physical activity or doing it fortnightly or less
- More participate in physical activity than sport classified activities (72% vs. 50%)
- Nearly 4 in 10 (38%) of Australians want to do more sport. Even 34% of non-active or less active Australian's want to do more.
- Some populations (females, older Australians, those with disabilities, lower income, less educated) are less engaged or convinced about the benefits of physical activity and sport and also are less active.

It is acknowledged that currently programs and initiatives are in place to address some of these gaps (for example female participation) however the National Plan should address these as collective goals and efforts.

- *Firstly, addressing barriers to 'sport' participation is required. We recommend the selection of a small number of barriers, and that the National Sports Plan outlines some specific initiatives or recommendations for government consideration to commence addressing these barriers.*
 - *For example this could include addressing 'misconceptions' around what is sport or in practice insuring those key motivations for participation (social, enjoyment etc.) continue to be experienced among participants, particularly children where participation is high in youth and then drops at adult ages.*
 - *Another example is addressing the barrier of time and what it means to be involved in 'sport' by providing means or suggestions for participation that may better fit into people's various lifestyles.*
- *Secondly, given positive attitudes to physical activity are largely already established (more so than sport), there are opportunities to convert and activate individuals to do more or get involved. This requires behavioral interventions and strategies or tactical efforts (rather than education per se). Setting some personal challenges (take a walk once a week) or encouraging or developing workplace activities to encourage staff to be active.*
- *Key groups to address are females and older Australians (50 years plus).*

Whilst it is not realistic to consider 100% participation in sport, we recommend that the National Sports Plan sets a general target across the population (or by certain demographics if this is more useful) to aim towards, i.e.

- *Target 2020: 100% physical activity of any form at least once a week*
- *Target 2020: 70% adult participation in a sporting classified activity and 100% for children.*

Performance

Australians consider that Australian performance in sport is important, and contributes to both national pride and identity, positive international exposure as well as grassroots sporting participation.

- Having Australia represented in sport internationally instils pride in our country (78%)
- High performance sport contributes to Australia's national identity (78%)
- High performance sport gives Australia positive international exposure (77%)
- High performance sport encourages participation in the sport itself (69%).

Australians do expect Australia to perform well internationally:

- Nearly half (45%) expect Australia to be in the top 10 countries and over half (55%) expect Australia to be in the top 20.

This could be a target (top 10) while top 5 could be a stretch target however it is important to consider the specific sports and Australia's current performance.

However, there are some questions as to how the high performance sport directly impacts the community – it appears that while conceptually Australians can see links but evidence is not always visible / tangible.

- High performance sport makes a valuable contribution to Australia's economy (66%)

We recommend that the National Sports Plan considers the development of a metric of sorts that measures the grassroots flow on effect from high performance sport to community engagement. This could be developed in conjunction with an appropriate university partners or economists, but could become an ongoing measure, similar to a social capital measure, that determines levels of cohesion and benefit to high performance sport.

- *If this measure (or similar) is already in place, we recommend the National Sports Plan puts in place a Communication Strategy to educate and inform key target audiences of this metric, and the positive impact for Australian communities.*
- *Specific messaging around this could clearly demonstrate the economic value or flow on effect in terms of participation.*

Preventative health

Similarly, it is widely accepted that being 'active' has direct impact on health and mental wellbeing however there continues to be a gap between beliefs and action.

Again there are opportunities to further engage and inspire Australians, business, institutions to view 'being active' as a long term goal and it is understood that there are statistics / analysis that can directly demonstrate the link and benefits of physical activity.

- *This could include direct links to lower risks or benefits to individuals (ability to do xxx with children, family) to say workplaces (reduced absenteeism etc).*

Given the public already has exposure to numerous health outcomes, should communications be used to engage the public or public institutions (workplaces, schools, educational institutions etc.) messaging will need to be tested to be unique or strengthened to show direct impact and benefits supported by participation strategies to enable intentions to be translated to action.

However, given there are already positive attitudes and beliefs around the role of physical activity and sport in preventative health implications, behavioral solutions (tactical or initiatives to facilitate participation) would be more impacting than further education in this area.

Integrity

Integrity is seen to be core to the value of sport in Australia however, selected events can tar the overall reputation of Australian sport (particularly at a high performance level).

- Not all are convinced that high performance athletes are positive role models (62% agreement) or that it has high integrity (60% agreement).

Importantly, the Government is seen to have a key role in protecting the integrity of sport (77%)

The Plan should consider the need to address this from a governance perspective seeing Australians accept the Government's role to intervene in issues of integrity in sport.

There is a role for taking a public stand on matters of sport integrity and addressing how and what is expected of the athletes, management and organisations involved (from grassroots to high performance (and high visibility) sporting organisations to health professionals) whether this be from a regulatory stance or even symbolically, and across the sporting levels from grassroots, schools to high performance competitive sport.

- *For example, can relevant parties and individuals take a 'Pledge' to commit to respect and integrity of participation?*

Given this research touched lightly on integrity, it will be beneficial to analyse other available research (or further explore) this area to identify the key issues for public concern at all levels of sport.

4 CONTEXT

The Australian Sports Commission (ASC) is the national governing body for sport in Australia. The ASC administers and funds sporting programs on behalf of the Australian Government. In 2016-17, over \$357 million was invested in sport and recreation activities and facilities. To understand how this investment is adding value while addressing the needs of our society, the National Sports Plan (the Plan) is being developed. In essence, the Plan, “will be a long-term strategy for the whole of sport and will examine four key pillars of participation, performance, prevention through physical activity, and integrity¹.”

Through the plan, the Australian Government is looking to set out Australia’s expectations of the sports sector, including our shared goals for high performance sport; sporting participation; cultural and public health outcomes and levels of investment. The Plan is intended to guide future priorities and approaches, to position Australian sport for the long term. It will examine and seek input from individuals, community groups, sporting organisations, businesses and governments.

The development of the National Sports Plan is intended to be a system wide examination of sport in Australia to strategically position sport into the future. This will be delivered around four key, interrelated pillars of participation, performance, preventive health through physical activity, and integrity.²

Consultation with the sector and community is sought to understand and marry the values and goals of the Plan across key audiences. The consultation process will take a multi-level consultation approach, part of this being a survey with the community to understand current perceptions and values around sport to inform the future plan and strategy.

5 OBJECTIVES

The aim of the research is to obtain a nationally representative read of community perceptions around the value of sport – both at a personal level and across the community and the country at large as well as expectations of the Australian sports sector. This includes understanding views of:

- Goals for high performance sport
- Sporting participation
- Cultural and public health outcomes
- Opportunity and success.

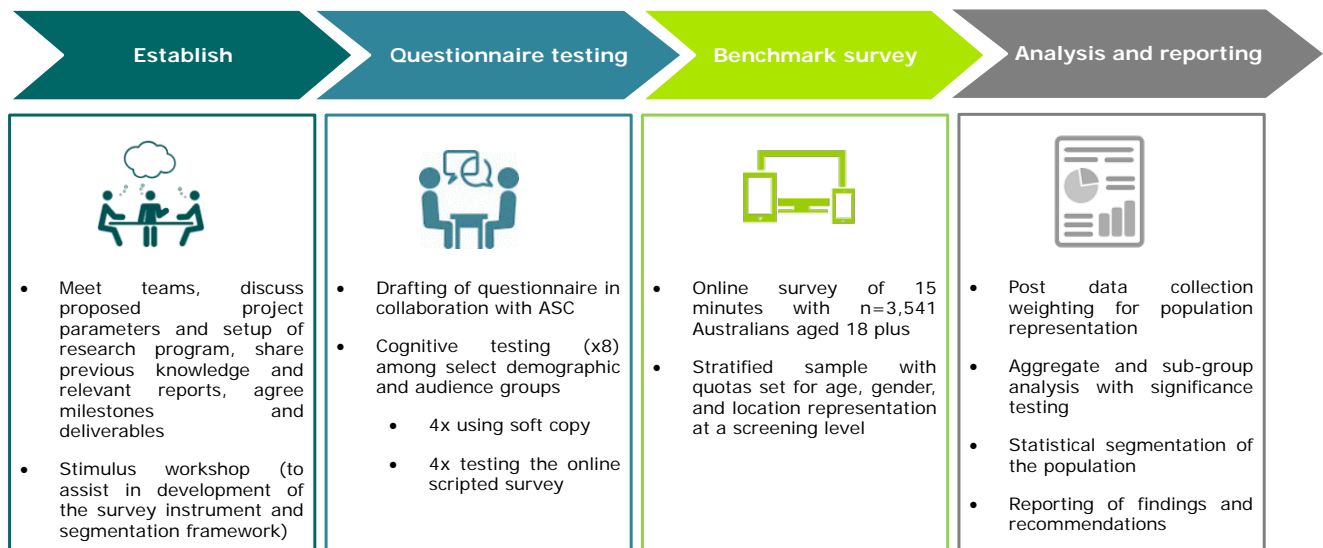
¹ <https://www.greghunt.com.au/Home/LatestNews/tabid/133/ID/4261/National-Plan-for-elite-sport-and-participation.aspx>

² <https://www.ausport.gov.au/nationalsportplan/about>

6 RESEARCH OVERVIEW

The research involved the development of questionnaire which was tested before conducting via an online survey with a nationally representative sample of n=3,541 Australians recruited via online research panels. A multi-staged approach was used to develop, test and execute the research program.

Figure 1: Overview of research program



6.1 SURVEY DETAIL

Data collection method



- Online survey recruiting from online research panels
- Fieldwork from 22nd – 27th June 2017

Sample profile and source



- n=3,541 – representative sample of Australians aged 18 +
- Quotas at screening age, gender and location and post data collection weights applied based on 2016 population statistics (ABS 31010DO001_201609 Australian Demographic Statistics, Sep 2016)

Questionnaire structure



Survey length: 18 minutes on average

- Perceptions of sport and physical activity (PA) – community
- Perceptions of sport and physical activity (PA) – high performance / elite
- Level of importance of various issues
- Current behaviour and attitudes – personal
- Attitudes towards various issues
- Final demographics

6.2 NOTES TO THE REPORT

For scaled questions (0-10), agreement is reported on the proportion selecting 7-10 out of 10.

Statistical significance testing has been applied to compare different audience groups. The following symbols indicate significant differences:

↑ ↓ significantly higher or lower at a 95% confidence interval compared to other relevant sub-groups

	Males	Females
--	-------	---------

Agree 78 ↑ 72 ↓

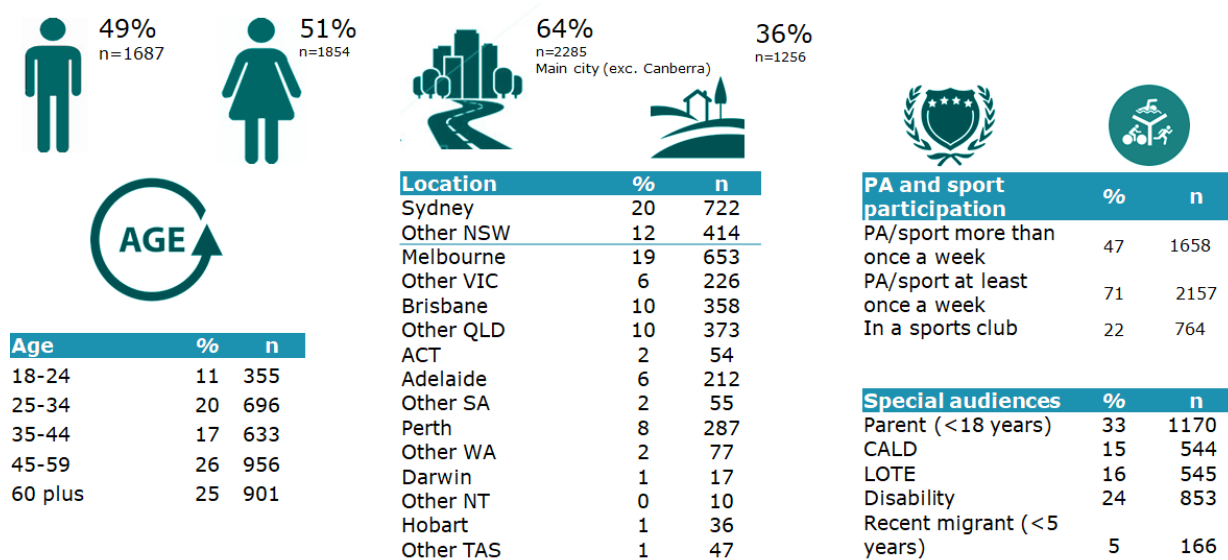
differences the term 'indicative' may be used.

For example: in the hypothetical example, Males were significantly more likely than females to agree. For brevity, commentary will mention being 'more' or 'less' likely if there are statistical differences. For non-statistical but notable

6.3 SAMPLE PROFILE

The sample recruited was nationally representative based on age, gender and location and weighted to correct any minor differences based on ABS population statistics³. Other characteristics were allowed to fall out naturally and the sample included 15% culturally and linguistically diverse audiences (CALD), 16% who spoke a language other than English at home (LOTE), 24% with a disability and 5% recent migrants. Participation levels for physical activity and club sports were in line with other studies such as AusPlay.

Figure 2: Demographic profile



Some other observations about the sample:

- Of the CALD respondents, 62% were LOTE (speak a language other than English at home)
- Recent migrants were mostly from non-English speaking countries
- Lower income households (<\$31K household income per annum) were more likely to be made up of older Australians (52% vs. 43% of the total population), those with disabilities (47% vs. 24% of the total population and with a lower education (46% school education).

³ (ABS 31010DO001_201609 Australian Demographic Statistics, Sep 2016)

7 OVERVIEW OF FINDINGS

THE ROLE OF PA AND SPORT IN AUSTRALIANS' LIVES

Australians put great emphasis on physical activity (and sport as a part of all physical activity) particularly for children's involvement in physical activity and health, fitness or sport is an important part of over two thirds of Australians lives.

- Over 8 in 10 (81%) of Australians believe it is important for adults to participate in physical activity for sport, exercise or recreation and nearly 9 in 10 (87%) believe it is important for children and youth to participate. Nearly 8 in 10 (77%) also believe that it is important for children and youth to participate in sport specifically and this belief is higher than that of adults participation in sport (58%).
- Around a third (32%) of Australian's consider both health and fitness AND sport as an important part of their life and the majority would say health and fitness are important (62%).
- Over a third consider sport or PA to be a main hobby or interest and it accounts for 10% of time spent on hobbies / interests however this is relatively less share of time than other activities.
- High levels of participation among children (5-17 years) in organised sport, exercise or recreation outside of school hours - three in four of parents (74%) have children who are doing organised sport, exercise or recreation outside of school hours. Half consider sport or PA to be their child's a main hobby or interest and it accounts for 16% of time spent on hobbies / interests which is on par with other activities they engage in. Compared to adults, children appear to spend more of their time doing physical activity or sport.

However, there continues to be a value divide in perceptions of sport between males and females, income groups. However encouragingly, special audiences (ATSI, CALD, LOTE included) put high importance on participation in sport.

There is relatively high levels of participation in physical activity and sport – and this participation is seen to make positive contributions to their lives.

- High levels of participation in physical activity (71% at least weekly) and a significant proportion of Australians are keen to do more sport (38%). Half of Australians (50%) do a sporting classified activity as their main form of physical activity.
 - That said, non-sport classified activities are more common (72%).
- For those who participate in physical activities, sport / physical activity is seen to have a positive contribution to their lives (80% positive contribution). A high proportion, the majority of Australians are engaged with sport – from a participation level or through spectating / following sport. Overall, around 6 in 10 (57%) can be described as sport fans – supporting or watching / following sport. A third (32%) are active investors in sport – investing time and money into spectator sport and 4 in 10 (38%) want to do more sport.
- Spectator sport is also popular among Australians (58% watch fortnightly and 48% weekly) and 44% follow Australia when competing internationally.

Many want to do more sports but there are many who aren't even active in physical activity

- While we observe around 3 in 10 to be largely inactive (do physical activity at least ever y fortnight or none at all), many of these want to do more sport (34%). Interest in doing more

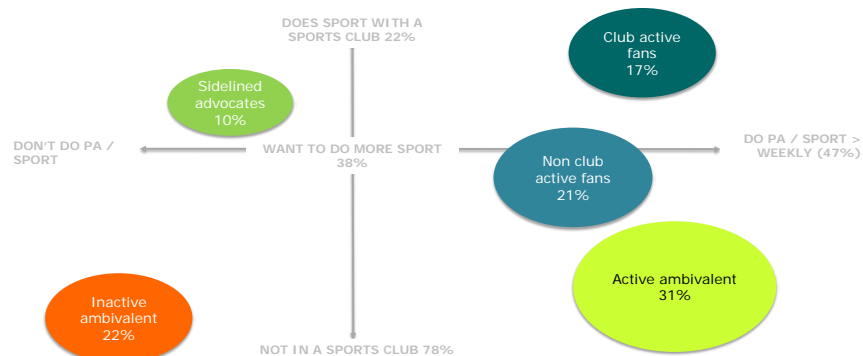
sport is highest among those who are already doing some sport or physical activity – so it's about finding opportunities for them to extend their activity.

The biggest challenges will be to get females and older Australians (aged 50 and above) to participate as well as those with disabilities in sport. There is also higher participation in non-sport classified activities than sport classified activities (72% vs. 50%). This suggests it is naturally easier to get people to engage in 'non sport' or physical activities generally (and this is reflected in attitudes). If the goal was to get 100% participation in sport, it would be a harder task. As general physical activity seems to sit more comfortably with individuals than 'sport', this should also be considered as it would require finding opportunities to engage rather than also overcoming attitudes or perceived barriers.

A SEGMENTATION

The market can be segmented based on behaviour and attitudes to physical activity and sport. The segmentation identified 5 segments in the population, 3 pro sport segments making up nearly half the population (47%) and 2 sport ambivalent segments making up 53% of the population with each segment exhibiting different demographic characteristics.

The segmentation analysis indicates that the majority of the Australian population can be engaged further either through encouraging participation in physical activity or sport.



- Club active and Non-club active fans (that make up 38% of the population) are the biggest supporters of sport in terms of participation and spectating sport and will be the biggest advocates for sport investment and development.
- Active ambivalent (38%) could benefit from education / inspiration around how 'sport' can be part of their lives – many who actually do sport related activities but they have a perceptual barrier on the idea of 'sport' and what it constitutes.
- Sidelined advocates (10%) have a desire to be involved more but are currently less active suggesting mobilisation programs to activate their positive intentions.
- The only segment that will be hard to reach are the Inactive ambivalent (22%) who are more sedentary and share few positive personal attitudes toward sport generally.

CURRENT PERCEPTIONS AND BENEFITS OF SPORT AND PHYSICAL ACTIVITY IN AUSTRALIA

Overall, Australians are highly convinced of the personal benefits (physical and mental) of being active – particularly for children's development. They are also able to see broader benefits of sport to the community and economically. While agreement is not universally observed for all claims around sport at a personal and community level, few would disagree on the areas surveyed.

- The Australian community largely share these views although benefits beyond personal benefits are less likely to be held among the sport ambivalent segments.

Australians are convinced of the physical and mental benefits of being active and the majority also see additional benefits (social, sense of achievement, motivation).

- Based on agreement of 7-10 out of 10, around 9 in 10 Australians believe being active is good for mental health (89%) and physical health (89%) and helps to relieve stress (87%). Around 8 in 10 see that sport promotes social interaction and friendships (84%) that sport and physical activities provide people with a sense of achievement and builds confidence (82%) and helps to motivate people and create a sense of purpose (80%).

Sport is also seen to be important for a child's development and part of their education.

- Over 8 in 10 of Australians believe that sport and physical activities are important for a child's development (85%) and an important part of their education (82%) and that sport is a great foundation to set children with health habits for life (85%).

Sport has wider benefits to the community and most Australians believe that sport has benefits for social cohesion and community.

- Around 8 in 10 Australians believe sport brings people together and promotes a sense of belonging (81%) and that sport helps instil a sense of pride in our communities (78%).

To a lesser extent the majority (albeit a smaller majority) feel that community sport provides economic benefits and employment for individuals

- A similar proportion, 70% believe sport and physical activities generate economic benefits for Australia but fewer believe this is directly linked to employment and income for individuals (62%).

CURRENT PERCEPTIONS AND BENEFITS OF HIGH PERFORMANCE / ELITE SPORT

High performance sport is positively perceived in Australia. Australians see that high performance sport has direct positive impact on national pride and our reputation as a country and as well believe – but to a lesser extent – how it has flow on benefits for the Australian community and sport participation.

While agreement is not universally observed for all claims around high performance sport in Australia, few would disagree on the areas surveyed. Encouragingly, regardless of segment (and personal views / engagement with sport), the majority of Australians can see how high performance / elite sport benefits Australia – however ambivalent segments are more sceptical particularly around economic contribution, community benefits and integrity issues.

Australians believe that Australia is respected on the international sporting stage (75% agree).

- The majority of Australians (75%) agree that Australia is respected on the international sporting stage.

High performance sport is seen by most Australians to instil national pride and identity as well as positive international exposure but there is less certainty that it makes a valuable contribution economically.

- The majority (8 in 10) believe that representation of Australian sport / athletes instils pride in our country (78%) and contributes to national identity (78%). It is also seen to give Australia positive international exposure (77%). Albeit to a lesser extent, high performance sport is seen make a valuable contribution to Australia's economy (66%).

High performance sport is also – but to a lesser extent – seen to provide benefits for the Australian community and sport participation

- The majority of Australians (but not all) believe that high performance sport can bring communities together (67%) and has flow on effects direct to community through encouraging participation in the sport itself (69%) and providing infrastructure / facilities for participation at a local level (64%). While there was higher levels of uncertainty about these claims generally (neutral ratings) few disagreed on these claims.

THE VALUE AND IMPORTANCE OF INVESTMENT IN SPORT

While the importance of supporting community sport and individuals is seen to be relatively more important than investment in high performance and international sport / events - investment in high performance sport is seen to be important and there is a view that the Government has a key role in sport development and intervention.

Australians believe it is important that the Government...

- encourages Australian's to be active (82%) or to participate in sport (71%)
- invests in local community sport (71%)
- has a key role in protecting the integrity of sport (77%)
- invest in hosting international sporting events (72%)
- invest in attracting and securing international sporting events (72%).
- invest in the development of high performance athletes and sport in Australia (69%).

While Government funding or investment in sport is seen to be largely sufficient, many believe it is not enough.

- Just under half (41%) feel that the Australian Government is spending sufficiently and 30% feel it is not enough (22% less than it should and 8% too little.

Australians see several reasons for investing in international sporting events held in Australia – in particular bringing tourism to Australia and promoting Australia more generally as well as building national pride / identity and the economic benefits from attendance.

EXPECTATIONS OF PERFORMANCE

Australians have high expectations around how Australia performs internationally.

- Nearly half (45%) expect Australia to be in the top 10 countries and over half (55%) expect Australia to be in the top 20. However just under 2 in 5 (16%) would expect top 5 performance from Australia.

INTEGRITY

Integrity is seen to be of key importance in sport however, this is an area the public are not necessarily assured about in high performance sport in Australia.

- Not all Australians believe that high performance sport has high integrity or that are positive role models. While a majority view, not all are convinced that high performance athletes are positive role models (62% agreement) or that it has high integrity (60% agreement). That said other responses are typically neutral suggesting lack of awareness rather than disagreement. Local / community sport is seen to have higher integrity (70% agreement).

There are substantial risks to high performance / elite sport if was seen to lack integrity the main being that Australian's would lose respect for the game and subsequently it would lose its fans / following.

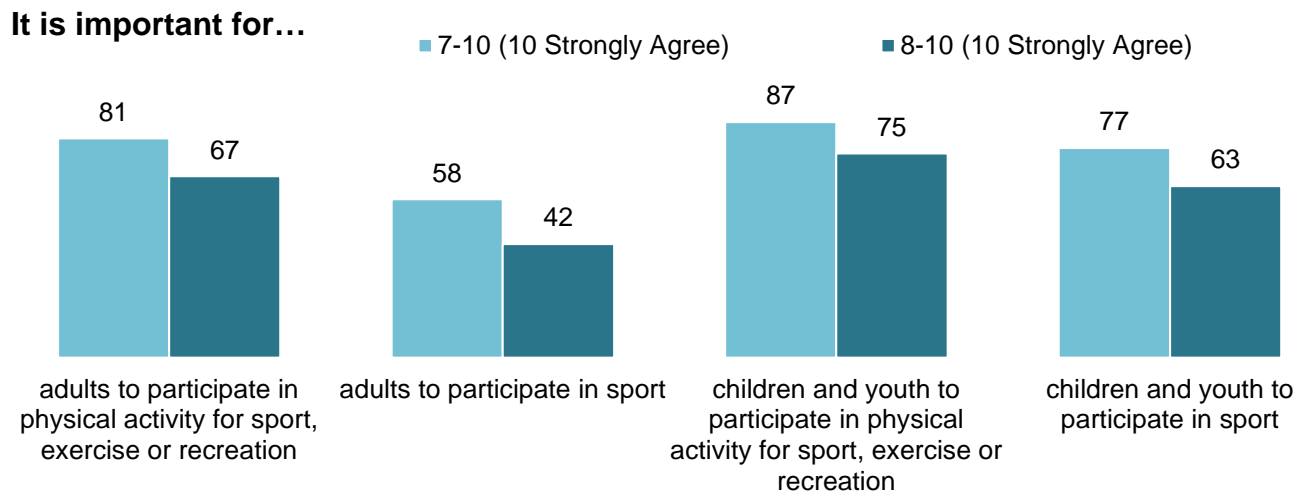
8 THE ROLE OF PA AND SPORT IN AUSTRALIANS' LIVES

8.1 Importance of participation in physical activity

Australians put great emphasis on physical activity (and sport as a part of all physical activity) particularly for children's involvement in physical activity.

Over 8 in 10 (81%) of Australians believe it is important for adults to participate in physical activity for sport, exercise or recreation and nearly 9 in 10 (87%) believe it is important for children and youth to participate. Nearly 8 in 10 (77%) also believe that it is important for children and youth to participate in sport specifically and this belief is higher than that of adults participation in sport (58%).

Figure 3: Importance of participation in physical activity



Base: Total respondents (n=3541), Showing %
Q4. What is your level of agreement with the following statements...?: It is important for

There continues to be a value divide in perceptions of sport between males and females, and income groups however encouragingly, special audiences (CALD, LOTE included) put high importance on participation in sport.

While more females believed it is important for adults to participate in physical activity for sport, exercise or recreation they were less likely to believe it is important for adults to participate in sport. Those from lower income groups as well as those with disabilities were less convinced that sport was important. Males, younger adults, parents, CALD, recent migrants, and higher income individuals were the groups most likely to believe it is important for adults to participate in sport.

Table 1: Importance of participation in physical activity by demographics

Column % (7-10 out of 10) It is important	Total (n=3541)	Male (n=1687)	Female (n=1854)	18-29 (n=722)	30-39 (n=636)	40-49 (n=646)	50+ (n=1537)	Parent (<18 years) (n=1170)
adults to participate in physical activity for sport, exercise or recreation	81	79 ↓	82 ↑	79	83	81	81	81
adults to participate in sport	58	61 ↑	56 ↓	65 ↑	65 ↑	59	52 ↓	66 ↑
children and youth to participate in physical activity for sport, exercise or recreation	87	86	88	83 ↓	88	86	89 ↑	85
children and youth to participate in sport	77	78	77	76	77	76	79	78

Column % (7-10 out of 10) It is important	Total (n=3541)	CALD (n=544)	Recent migrant (<5 years) (n=166)	ATSI (n=118)	Disability (n=853)	<\$31.2K (n=623)	\$31.2K< \$78K (n=1152)	\$78K< \$156K (n=961)	\$156K or more (n=308)
adults to participate in physical activity for sport, exercise or recreation	81	81	85	70 ↓	79	74 ↓	81	86 ↑	85
adults to participate in sport	58	70 ↑	78 ↑	66	50 ↓	54 ↓	58	62 ↑	65 ↑
children and youth to participate in physical activity for sport, exercise or recreation	87	86	90	80 ↓	87	82 ↓	87	91 ↑	91 ↑
children and youth to participate in sport	77	81	86 ↑	77	75	74 ↓	77	81 ↑	84 ↑

Base: Total respondents (n=3541), Showing %

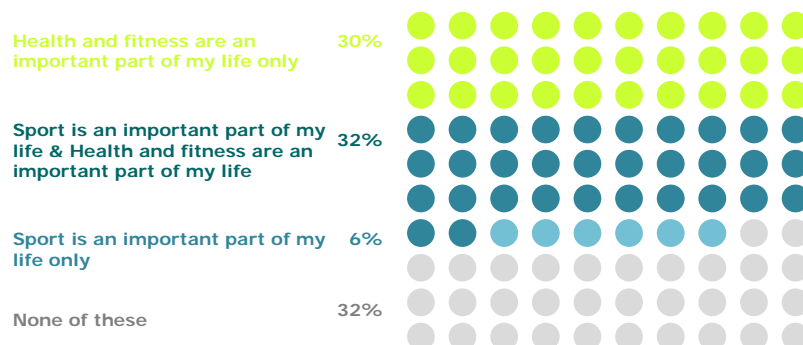
Q4. What is your level of agreement with the following statements...? It is important for...?

8.2 Importance and impact of health / fitness and sport in people's lives

Health, fitness or sport is an important part of over two thirds of Australians lives.

Around a third (32%) of Australian's consider both health and fitness AND sport as an important part of their life and the majority would say health and fitness are important (62%). Around a third of Australians (32%) don't feel health and fitness or sport are important to their lives.

Figure 4: Importance of PA and sport in people's lives



Base: Total respondents (n=3541), Showing %
Q13. What is your level of personal agreement with the following statements 7-10 (10=Strongly Agree)

In line with earlier demographic trends observed, males were

more likely to see sport to be an important part of their lives as were parents, CALD, recent migrants, ATSI as well as those in higher income households. Australians aged 18-39 years were also more likely to see sport as an important part of their lives. On the other hand, females and older Australians were even more likely to feel that only health and fitness are important in their life (and not sport). Lower income household and those with disabilities put less value on health, fitness and sport.

Table 2: Importance of PA and sport in people's lives by demographics

Column % (7-10 out of 10)	Total (n=3541)	Male (n=1687)	Female (n=1854)	18-29 (n=722)	30-39 (n=636)	40-49 (n=646)	50+ (n=1537)	Parent (<18 years) (n=1170)
Health and fitness are an important part of my life (total)	62	63	61	59	62	60	64	60
Sport is an important part of my life (total)	38	50 ↑	27 ↓	46 ↑	43 ↑	38	32 ↓	47 ↑
Health and fitness are an important part of my life only	30	23 ↓	37 ↑	20 ↓	27	27	37 ↑	21 ↓
Sport is an important part of my life only	6	10 ↑	3 ↓	7	8	6	6	8 ↑
Sport is an important part of my life & Health and fitness are an important part of my life	32	40 ↑	24 ↓	39 ↑	36	33	27 ↓	39 ↑
None of these	32	27 ↓	36 ↑	34	30	34	31	32

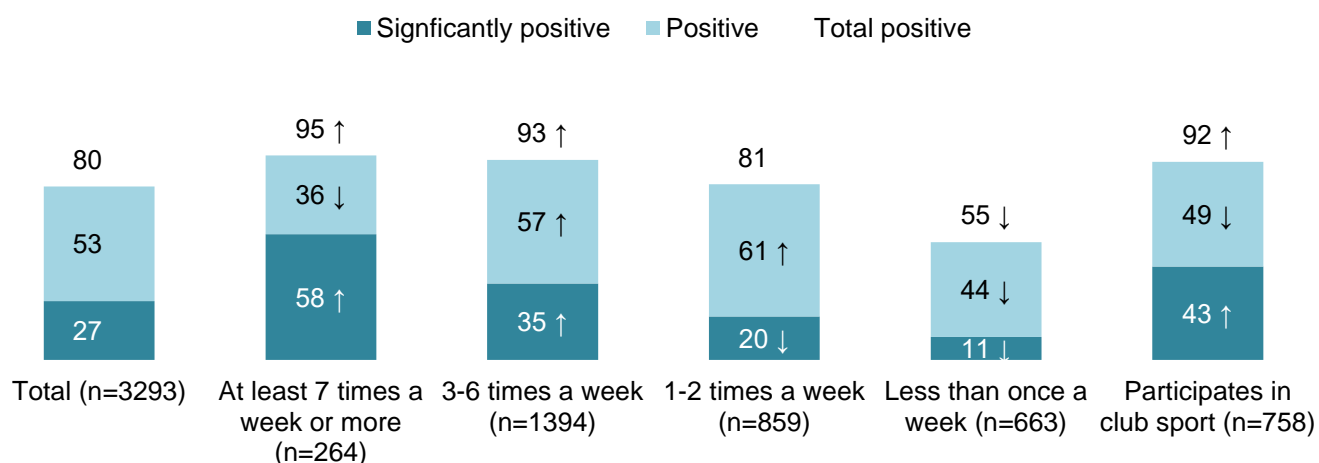
Column % (7-10 out of 10) It is important	Total (n=3541)	CALD (n=544)	Recent migrant (<5 years) (n=166)	ATSI (n=118)	Disability (n=853)	<\$31.2K (n=623)	\$31.2K< \$78K (n=1152)	\$78K< \$156K (n=961)	\$156K or more (n=308)
Health and fitness are an important part of my life (total)	62	70 ↑	72 ↑	59	53 ↓	55 ↓	59	65 ↑	70 ↑
Sport is an important part of my life (total)	38	43 ↑	53 ↑	51 ↑	27 ↓	31 ↓	37	43 ↑	53 ↑
Health and fitness are an important part of my life only	30	30	22	15 ↓	32	28	30	29	26
Sport is an important part of my life only	6	4 ↓	4	7	6	4 ↓	7	7	9
Sport is an important part of my life & Health and fitness are an important part of my life	32	40 ↑	50 ↑	44 ↑	21 ↓	27 ↓	29 ↓	36 ↑	44 ↑
None of these	32	27 ↓	24	34	41 ↑	40 ↑	33	28 ↓	21 ↓

Base: Total respondents (n=3541), Showing %
Q13. What is your level of personal agreement with the following statements 7-10 (10=Strongly Agree)

For those who participate in physical activities, sport / physical activity is seen to have a positive contribution to their lives.

Among Australians who do any type of physical activity (most Australians), 80% say that sport / physical activity has a positive contribution to their lives and 27% say it has a significantly positive contribution. This is highest for those aged 30 years and above. The positive impact of physical activity and sport is even higher for those who have higher frequency of participation or are in club sports.

Figure 5: Impact of sport / physical activity on life (contribution to life)



Base: Total respondents (n=3293), Showing %

Q11. Would you say that your participation in sport / physical activity...? Responses: Makes a positive contribution to your life, Makes a significantly positive contribution to your life

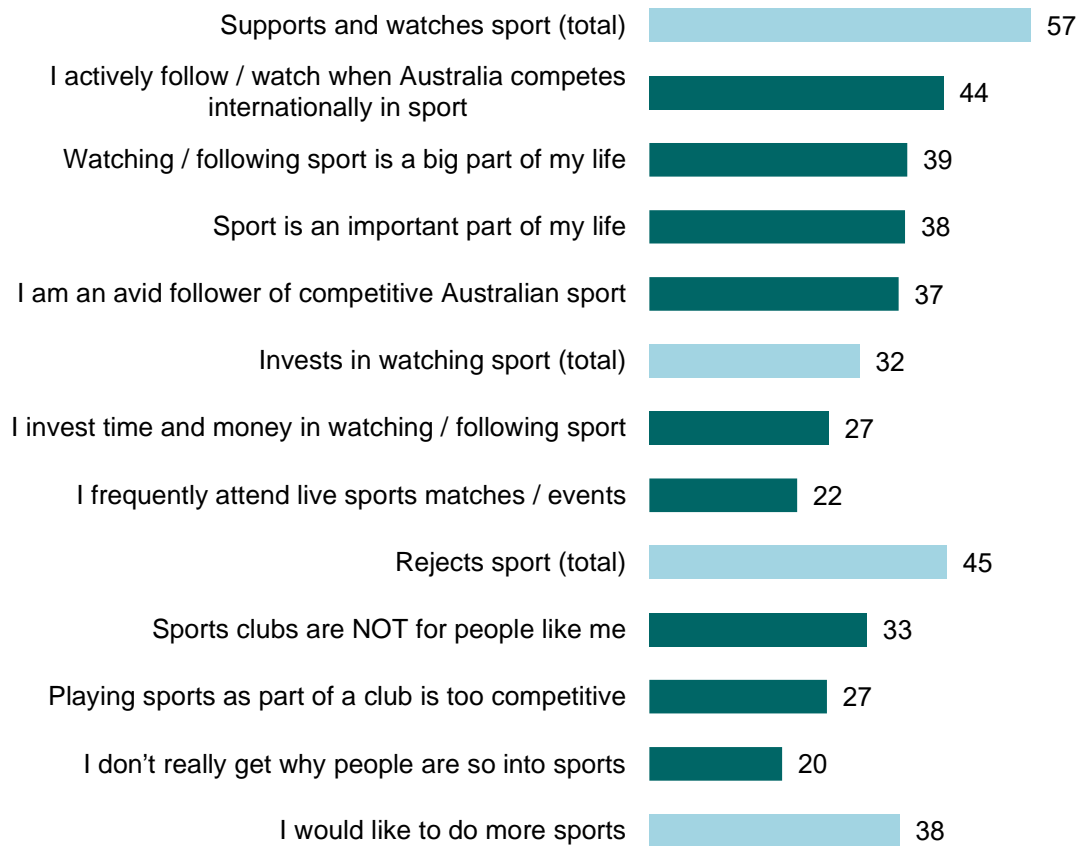
8.3 Engagement with sport

A high proportion, the majority of Australians are engaged with sport – from a participation level or through spectating / following sport.

Overall, around 6 in 10 (57%) can be described as sport fans – supporting or watching / following sport. A third (32%) are active investors in sport – investing time and money into spectator sport and 4 in 10 (38%) want to do more sport. Nearly half (45%) though would either reject sports clubs, don't understand why people get into sport or think it is too competitive. Demographic differences in these attitudes reflect earlier participation and value differences.

Figure 6: Attitudes: engagement with sport

% Agree (7-10, 10 Strongly agree)



Base: Total respondents (n=3541), Showing %

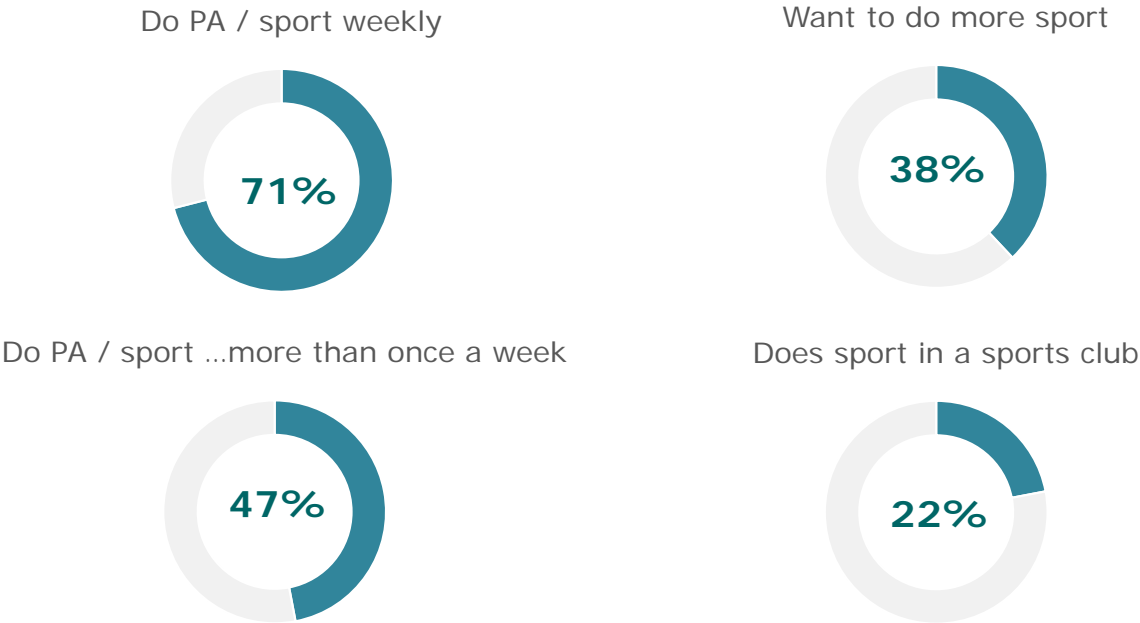
Q13. What is your level of personal agreement with the following statements 7-10 (10=Strongly Agree)

8.4 Participation in physical activity, sport and related activities

High levels of participation in physical activity and a significant proportion of Australians are keen to do more sport.

The majority of Australian's participate in physical activity or sport with 7 in 10 (71%) doing physical activity / sport at least once a week and 5 in 10 (47%) more than once a week. One in five (22%) did club sports. A high proportion, 4 in 10 (38%) want to do more sport.

Figure 7: Participation in physical activity and sport



Base: Total respondents (n=3541), Showing %
'Q9. How often do you participate in physical activities like sport, exercise or recreation? Q13. What is your level of personal agreement with the following statements...?: I would like to do more sports, Q12. In the last 12 months, did you participate in any sport or physical activities, as part of a Sports club or association that required payment of fees, membership or registration?

In line with perceived importance and value placed on sport, participation levels varied by audience with higher participation observed for males. The groups most interested in doing more sports were males and Australians aged 18-39 years as well as parents, CALD, recent migrants and those from higher income households. Participation in club sports was highest among males, 18-39 year olds, parents, recent migrants, ATSI and those from the highest income bracket.

Table 3: Participation in physical activity and sport by subgroups

Column %	Total (n=3541)	Male (n=1687)	Female (n=1854)	18-29 (n=722)	30-39 (n=636)	40-49 (n=646)	50+ (n=1537)	Parent (<18 years) (n=1170)
Participation in PA/sport								
Weekly	71	74 ↑	68 ↓	74	71	73	69 ↓	74
Less than weekly	19	17 ↓	21 ↑	21	20	19	17	19
> Weekly (total)	47	48	46	48	44	43 ↓	49	45
I don't exercise	10	9	11	6 ↓	8	9	14 ↑	7 ↓
Yes (participated in club sport in last 12 months)	22	28 ↑	17 ↓	34 ↑	26 ↑	21	15 ↓	30 ↑
I would like to do more sport (7-10 agreement)	38	42 ↑	33 ↓	52 ↑	49 ↑	38	25 ↓	51 ↑

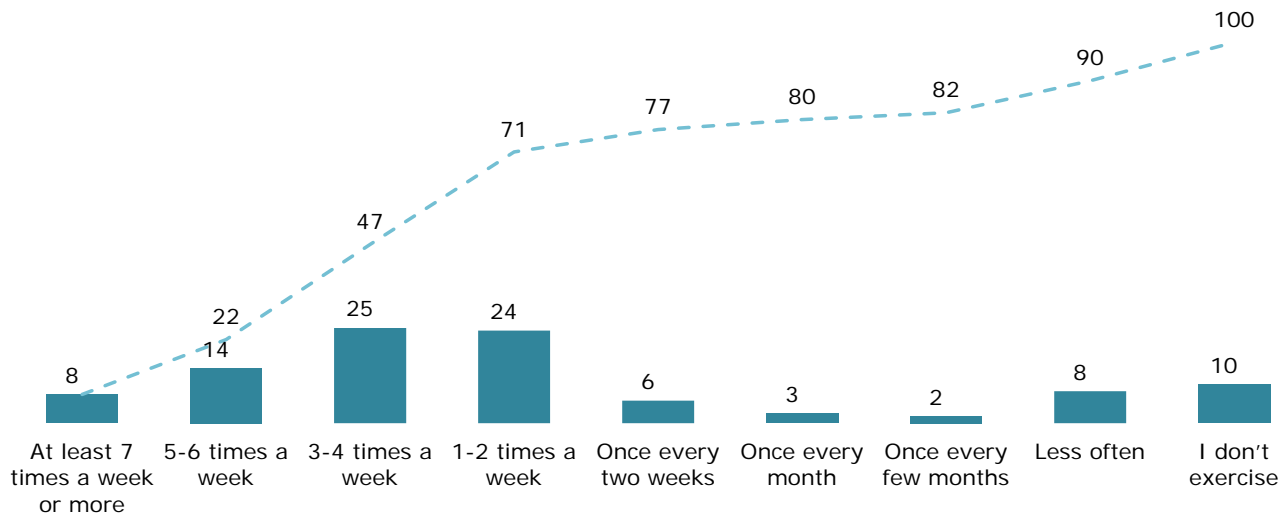
Column %	Total (n=3541)	CALD (n=544)	Recent migrant (<5 years) (n=166)	ATSI (n=118)	Disability (n=853)	<\$31.2K (n=623)	\$31.2K< \$78K (n=1152)	\$78K< \$156K (n=961)	\$156K or more (n=308)
Participation in PA/sport									
Weekly	71	72	76	78	61 ↓	63 ↓	69 ↓	77 ↑	83 ↑
Less than weekly	19	21	21	15	21	21	20	17	13 ↓
> Weekly (total)	47	44	44	54	40 ↓	40 ↓	45	50 ↑	59 ↑
I don't exercise	10	7 ↓	3 ↓	7	19 ↑	16 ↑	11	6 ↓	4 ↓
Yes (participated in club sport in last 12 months)	22	24	33 ↑	50 ↑	14 ↓	20	21	24	30 ↑
I would like to do more sport (7-10 agreement)	38	45 ↑	64 ↑	51 ↑	31 ↓	34	37	40	45 ↑

Base: Total respondents (n=3541), Showing %

'Q9. How often do you participate in physical activities like sport, exercise or recreation? Q13. What is your level of personal agreement with the following statements...?: I would like to do more sports, Q12. In the last 12 months, did you participate in any sport or physical activities, as part of a Sports club or association that required payment of fees, membership or registration?

Around half (47%) participated in physical activities like sport, exercise or recreation more than once a week. Around 3 in 10 (29%) did physical activity less than once a week including 10% who did none at all.

Figure 8: Frequency of participation in physical activity and sport



Base: Total respondents (n=3541), Showing %
'Q9. How often do you participate in physical activities like sport, exercise or recreation?

These non-active or less active individuals were typically females, over 50 years old (in particularly among females aged over 50 years), those with disabilities, those from lower income households or those who only have school level education or lower.

Table 4: Profiling non-active or less active in physical activity

Column %	Total (n=3541)	Less than weekly or no physical activity (n=1024)
Female	48	56 ↑
50+	45	46 ↑
Disability	20	33 ↑
Up to \$31,199	15	22 ↑
\$31,200-\$77,999	30	36 ↑
School education or lower (total)	25	39 ↑

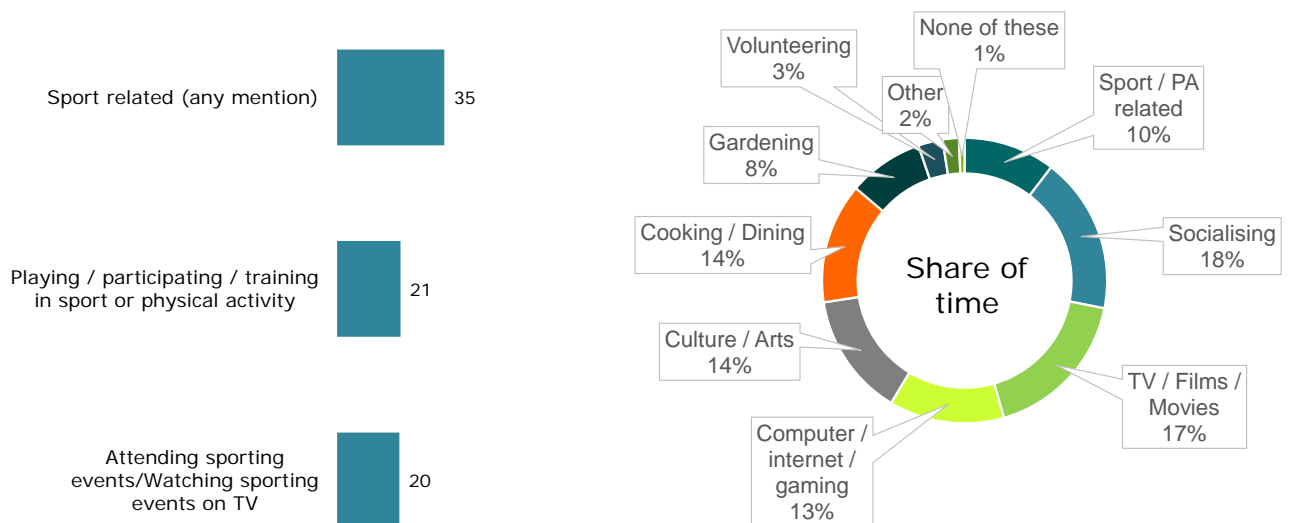
Base: Total respondents (n=3541), Showing %
'Q9. How often do you participate in physical activities like sport, exercise or recreation?

8.5 Share of time (hobbies / interest)

Over a third consider sport or PA to be a main hobby or interest and it accounts for 10% of time spent on hobbies / interests.

On average, Australians identified 4 hobbies / interests. Over a third of Australian's mentioned sport / PA related activities as one of their main hobbies / interests. This was evenly spread between playing / participating or training in sport or physical activity (21%) or attending / watching sports (20%). This equates to 10% of time spent on any hobby or interest. Other activities (socialising, watching TV/ Films or movies, on the computer / internet / games, culture / arts and cooking / dining out) had greater share of time.

Figure 9: Share of time (hobbies / interest)



Base: Total respondents (n=3541), Showing %. COUNT Q13B. What would you consider your main hobbies or interests that you regularly do/participate in outside of work/school? Note categories netted together into similar activities.

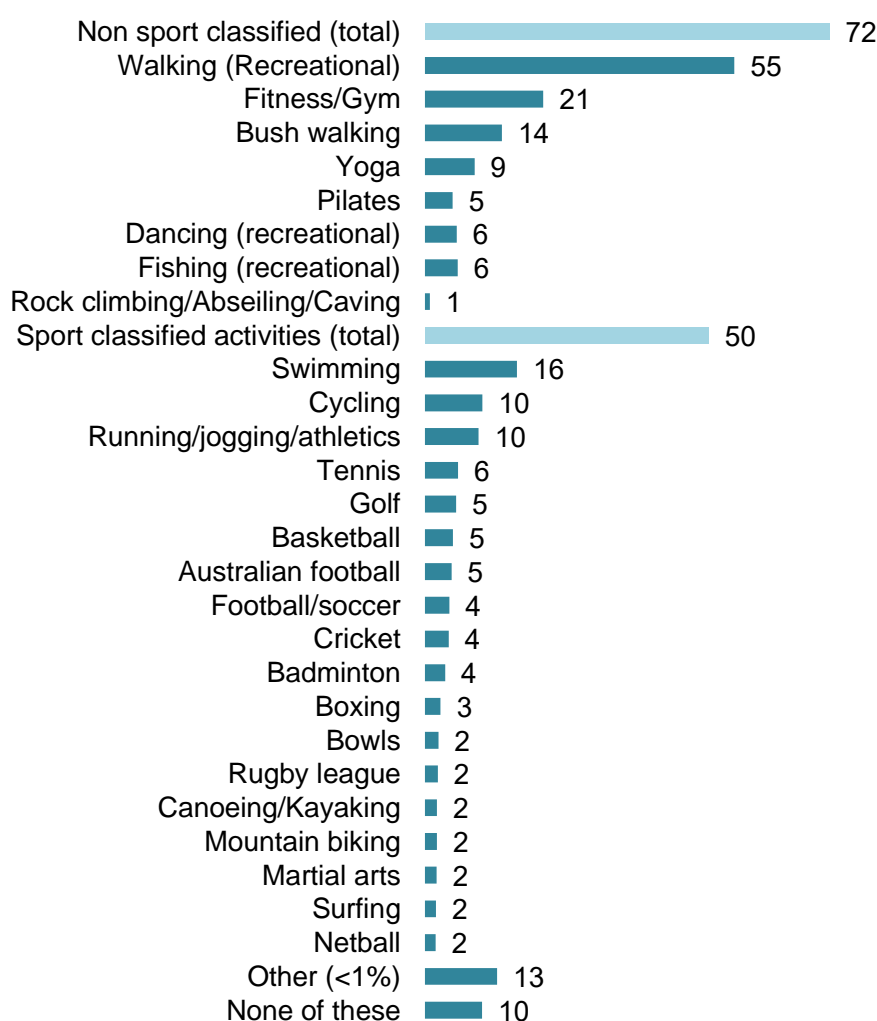
8.6 Main types of physical activity / sport

Half of Australians do a sporting activity as their main form of physical activity.

The majority of Australians (72%) undertake physical activities that are 'non sport' classified with recreational walking being the most common (55%) followed by fitness / gym (21%), bushwalking (14%) and yoga (9%) and Pilates (5%). That said, half of Australians named a 'sport' classified activity as their main form of participation, the most popular activities being swimming (16%), cycling (10%) and running / jogging / athletics (10%). The most common group / partner sports included tennis (6%), golf (5%) basketball (5%) and Australian football (5%). Only 1 in 10 (10%) Australian's did not undertake any form of physical activity.

There was higher participation in 'sport' classified activities among males, 18-39 year olds, CALD and as well as recent migrants. ATSI were more likely to do sport related activities (75%) but less likely to do non-sport activities (57%). Lower income were less likely to do either non-sport or sport related activities (67% and 40% for under \$31.2K per annum). Females were more likely to participate in non-sport activities as were 50 years and above (see Table 4: Participation in physical activity and sport by subgroups).

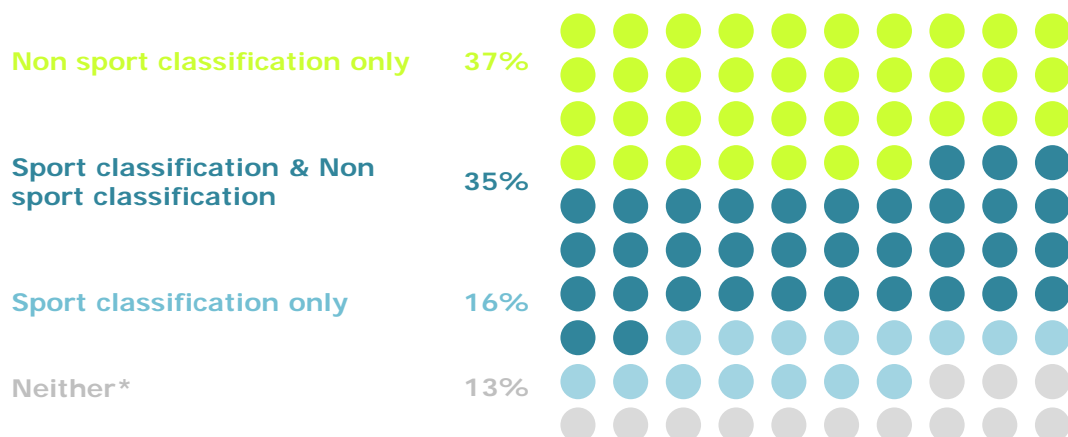
Figure 10: Main types of physical activity / sport



Base: Total respondents (n=3541), Showing %
Q10. Which are the main physical activities or sports that you do?

A high proportion of Australians are doing both 'non sport' and 'sport' classified activities (35%) while 37% do 'non sport' classified activities only.

Figure 11: Overview of physical activity / sport



Base: Total respondents (n=3541), Showing %
Q10. Which are the main physical activities or sports that you do? * Includes other specifies not classified into sport or non sport.

8.7 Opportunities to increase sport participation

As seen earlier the majority are doing some sort of physical activity. However not all are doing it frequently and not all are doing sport related activities. However, encouragingly, across all segments there are a sizable proportion who do want to do more 'sports'.

This is highest among those who are participating in physical activity weekly or fortnightly as well as those already engaging in sport classified activities. In fact, we see a desire to be involved among even those who do minimal activity.

Row %	I would like to do more sports (7-10 agree)
Total (n=3541)	38
Weekly or more (n=2517)	39 ↑
Fortnightly or less (n=1024)	34 ↓
At least 7 times a week or more (n=264)	38
5-6 times a week (n=511)	35
3-4 times a week (n=883)	39
1-2 times a week (n=859)	42 ↑
Once every two weeks (n=206)	49 ↑
Once every month (n=92)	46
Once every few months (n=64)	33
Less often (n=301)	32
I don't exercise (n=361)	23 ↓
Non sport classified (total) (n=2545)	37
Sport classified activities (total) (n=1762)	49 ↑

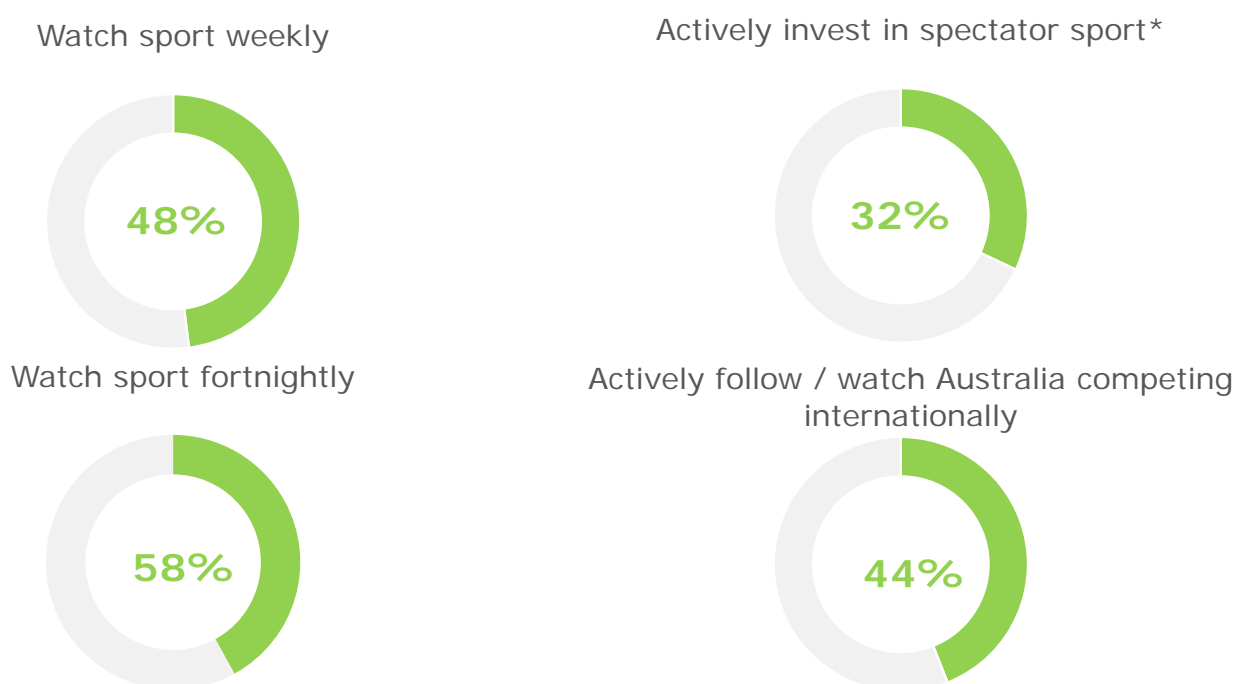
Base: Total respondents (n=3541), Showing %
'Q9. How often do you participate in physical activities like sport, exercise or recreation? Q13. What is your level of personal agreement with the following statements...?: I would like to do more sports,

8.8 Watching / following sport

Spectator sport is also popular among Australians.

Nearly half of Australians (48%) are watching sport every week and over 4 in 10 (44%) actively follow Australia compete internationally. A third (32%) are actively investing in spectator sport (frequently attending live sports matches / events or invest time and money in watching / following sport).

Figure 12: Watching / following sport



Base: Total respondents (n=3541), Showing %

*I frequently attend live sports matches / events + I invest time and money in watching / following sport

Q15B. How often would you watch or follow sports, whether it be on TV, at a live game etc? Q13. What is your level of personal agreement with the following statements...?: I actively follow / watch when Australia competes internationally in sport

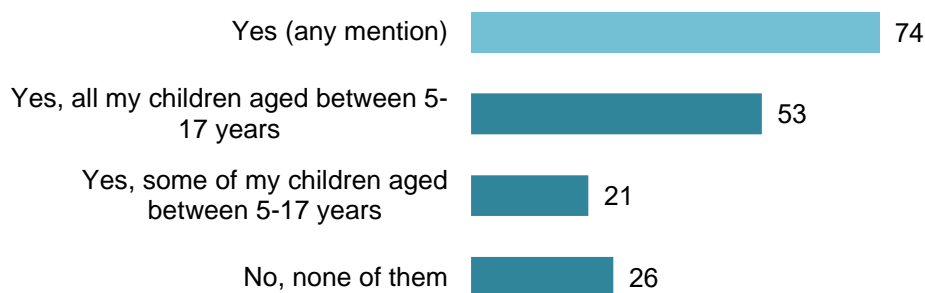
Males are more likely to watch sport regularly (nearly twice that of females) as do parents. Engagement and investment is highest among males, 18-39 year olds (who are also most active). CALD are also highly engaged audiences for sport in terms of watching, attending matches etc. While individuals with disabilities are generally less active, they are one of the most engaged audiences for sport (see Table 12: Watching / following sport by demographics).

8.9 Children's participation in PA / sport

High levels of participation among children (5-17 years) in organised sport, exercise or recreation outside of school hours.

Three in four of parents (74%) have children who are doing organised sport, exercise or recreation outside of school hours and half (53%) of households have all their children doing organised physical activities.

Figure 13: Children's participation in PA / sport

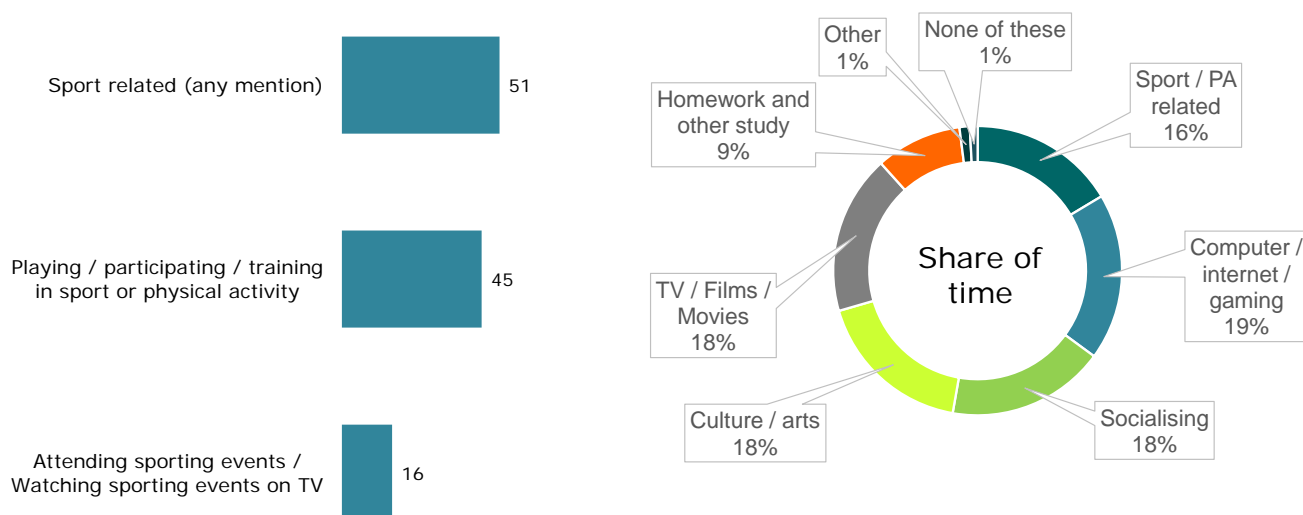


Base: Parents of children <18 years (n=796), Showing %. Q14. Do your children who are aged between 5-17 years do any organised sport, exercise or recreation outside of school hours?

Half consider sport or PA to be their child's a main hobby or interest and it accounts for 16% of time spent on hobbies / interests. Compared to adults, children appear to spend more of their time doing physical activity or sport.

On average, Australians identified their child / children to have 4 hobbies / interests. Half (50%) of parents mentioned sport / PA related activities as one of their child's main hobbies / interests. This was typically through participation (45%) with a smaller proportion attending / watching sports (16%). This equates to 16% of time spent on any hobby or interest which was on part with other activities like socialising, watching TV/ Films or movies, time on the computer / internet / games, culture / arts and is higher than observed for adults.

Figure 14: Share of children's time (hobbies / interest)



Base: Parents of children <18 years (n=796), Showing %. Q15. Child(ren)'s main hobbies/interests or other activities that they regularly do/participate in outside of school?

9 A SEGMENTATION OF THE MARKET

9.1 Segmentation constructs

To help understand the market, a segmentation based on participation / behaviour and attitudes has been developed.

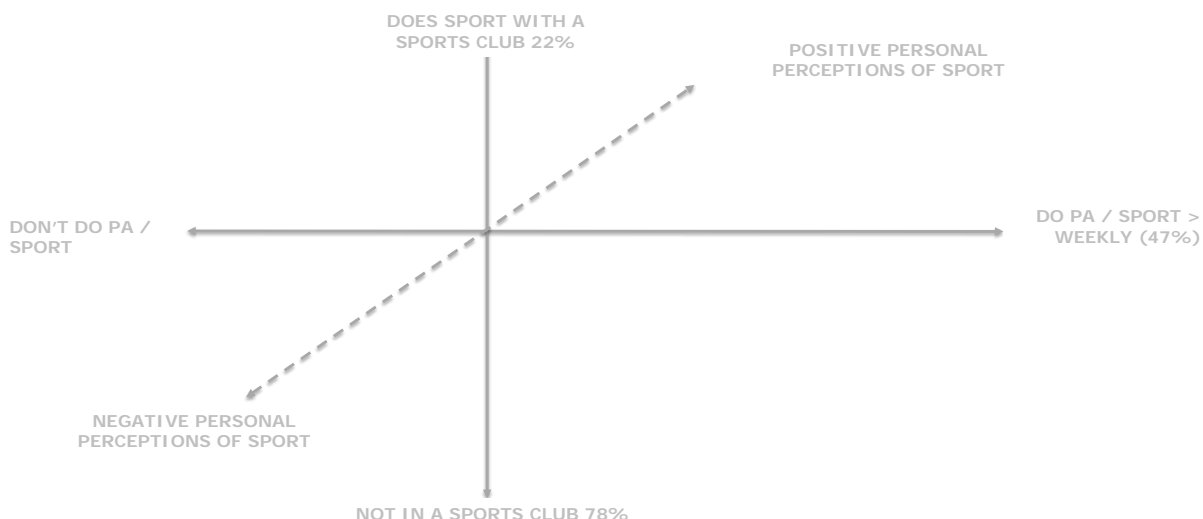
The variables used to create the segmentation used a combination of the following questions:

- Participation and involvement:
 - Q9. How often do you participate in physical activities like sport, exercise or recreation?
 - Q12. In the last 12 months, did you participate in any sport or physical activities, as part of a Sports club or association that required payment of fees, membership or registration?
- Attitudes / Perceptions of sport
 - Q13. What is your level of personal agreement with the following statements 7-10 (10=Strongly Agree). Showing those with greatest variance

The market can be segmented based on behaviour and attitudes to physical activity and sport.

The vertical axis corresponds to doing sport in a sports club / not in a sports club, the horizontal axis to level of participation in physical activity / sport (from none to high levels) and the diagonal axis to their perceptions of sport – negative or positive.

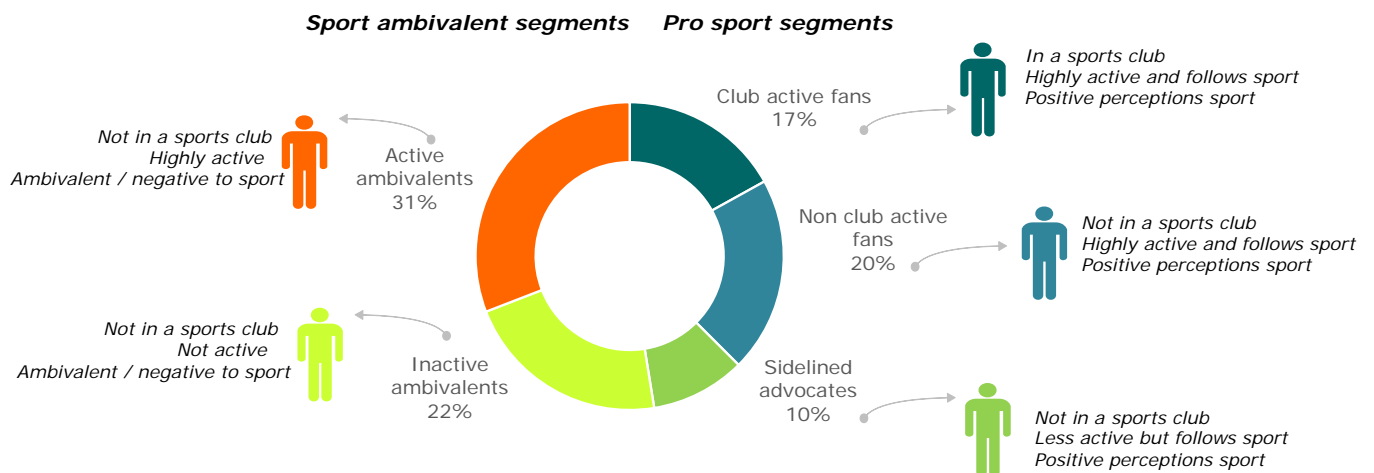
Figure 15: Market segmentation parameters



9.2 The segments

The segmentation produced 5 segments, 3 pro sport segments making up nearly half the population (47%) and 2 sport ambivalent segments making up 53% of the population.

Figure 16: Segments sizes and overview



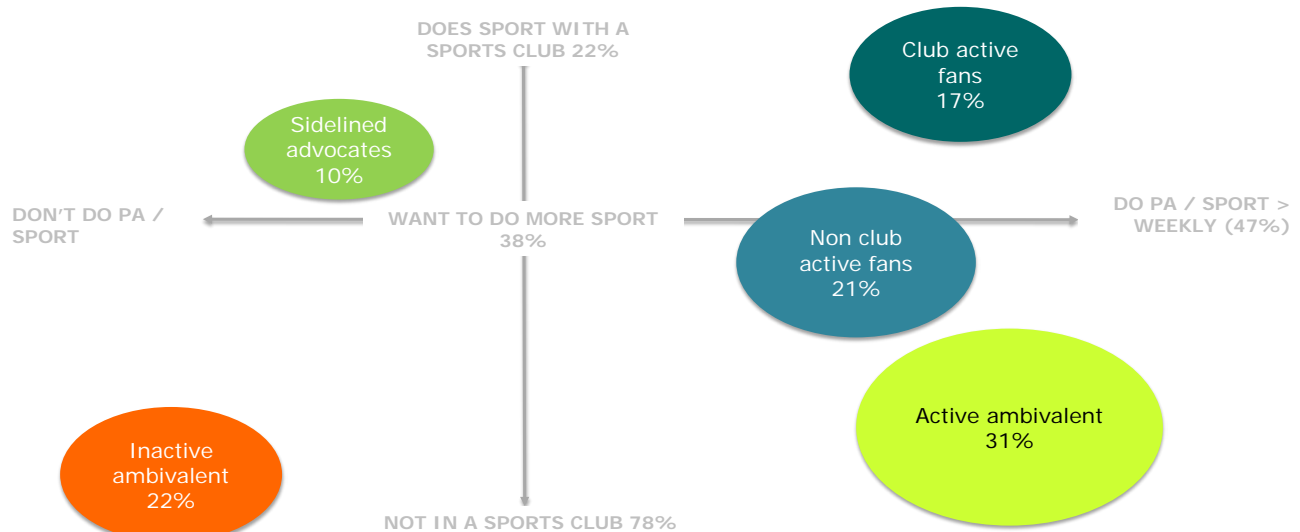
The table below summarises the key differences between the segments.

Table 5: Overview of segments

Segment	Segment size(% of population)	Participation in club sports	Participation in PA/ sport and watching sport	Perceptions of sport
Club active fans	17	Yes	Highly active and follows sport	Positive
Non-club active fans	21	No	Highly active and follows sport	Positive
Sidelined advocates	10	A few	Less active but follows sport	Fairly positive
Active ambivalents	31	No	Highly active	Ambivalent – negative
Inactive ambivalents	22	No	Not active	Negative

The key differences between segments are highlighted when plotted on the segmentation parameters. While most Australians are physically active to some degree but it is only the minority who are in clubs.

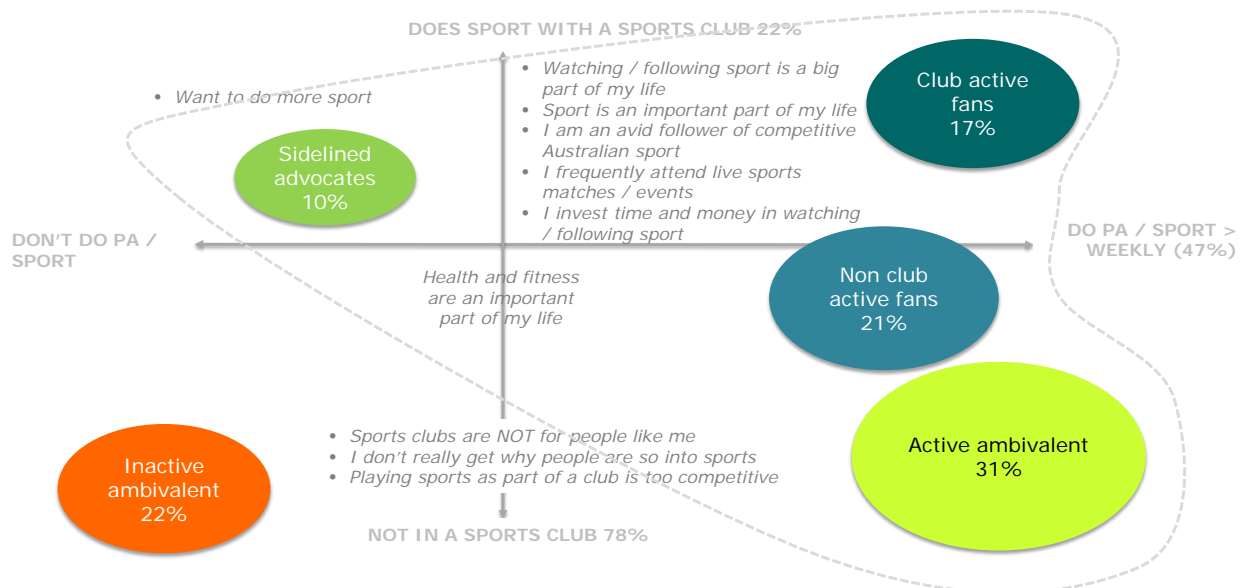
Figure 17: Market segmentation



Base: Total respondents (n=3541), Showing %. Q9. How often do you participate in physical activities like sport, exercise or recreation?, Q12. In the last 12 months, did you participate in any sport or physical activities, as part of a Sports club or association that required payment of fees, membership or registration? Q13. What is your level of personal agreement with the following statements 7-10 (10=Strongly Agree). Showing those with greatest variance

Overlaying attitudes provides an indication of potential segments for taking on the journey (as a spectator / supporter or participant) – only 22% are unlikely to be receptive audiences. Sidelined advocates while not currently active, are more likely to indicate higher desire to do more sport in the future.

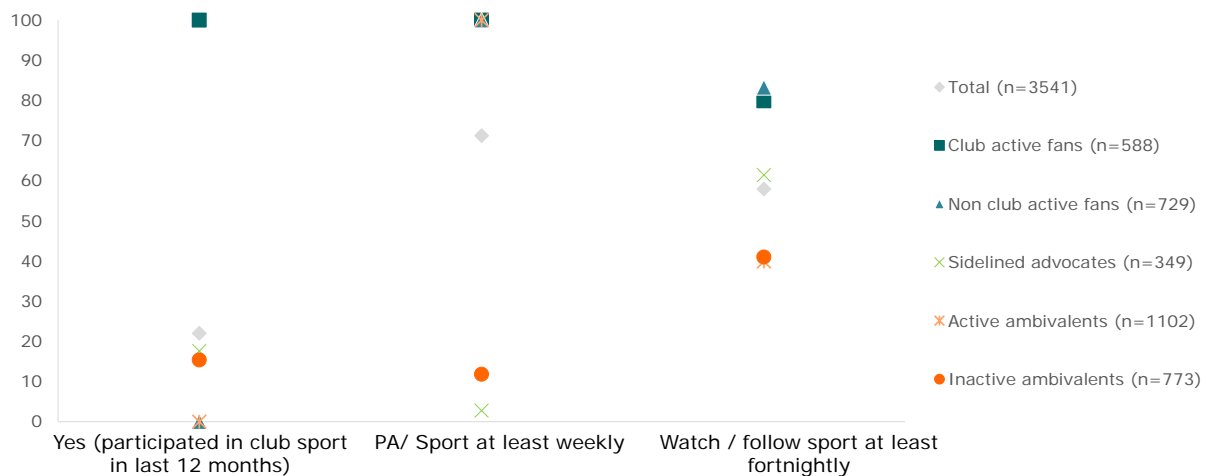
Figure 18: Market segmentation overlaid with attitudes



9.3 Profiling the segments

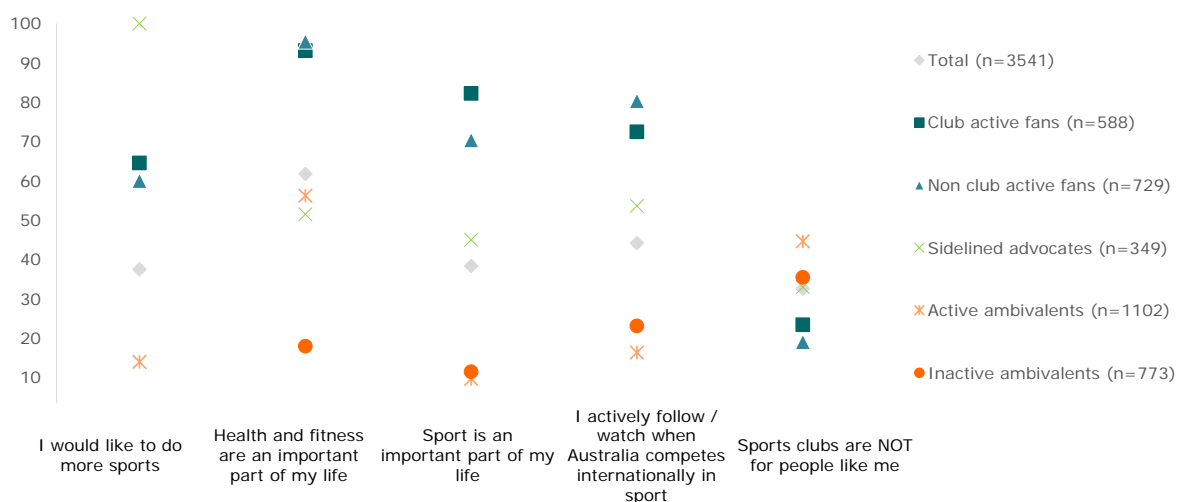
The key differences with regards to participation and attitudes are shown in the figures below:

Figure 19: PA / sport participation by segment



Base: Total respondents (n=3541), Showing %

Figure 20: Attitudes toward sport by segment



Base: Total respondents (n=3541), Showing %

As expected, Club active fans and Non-club active fans are the most active in sport classified activities although Non-club active fans are also highly active in non sport classified activities. Active ambivalent are most active in non sport classified activities (particularly high on fitness / gym and yoga/ Pilates). Despite having less positive personal attitudes toward sport, many are also involved in sport classified activities such as swimming, cycling and running / jogging / athletics but less so on team based or organised sport.

Table 6: Main types of physical activity by segments

Segment main physical activities	Total (n=3541)	Pro sport segments			Sport ambivalent segments		Pro sport segments (n=1666)	Sport ambivalent segments (n=1875)
		Club active fans (n=588)	Non club active fans (n=729)	Sidelined advocates (n=349)	Active ambivalent (n=1102)	Inactive ambivalent (n=773)		
Non sport classified (total)	72	68	82 ↑	55 ↓	86 ↑	51 ↓	72	72
Walking (Recreational)	55	40 ↓	64 ↑	43 ↓	72 ↑	40 ↓	51 ↓	58 ↑
Fitness/Gym	21	30 ↑	30 ↑	6 ↓	25 ↑	6 ↓	25 ↑	17 ↓
Bush walking	14	16	18 ↑	9 ↓	14	9 ↓	15 ↑	12 ↓
Yoga	9	10	10	6	12 ↑	3 ↓	9	8
Pilates	5	5	7 ↑	4	7 ↑	1 ↓	6	4
Dancing (recreational)	6	7	8 ↑	4	5	4 ↓	7 ↑	5 ↓
Fishing (recreational)	6	8 ↑	6	9 ↑	4 ↓	5	7 ↑	4 ↓
Rock climbing/Abseiling/Caving	1	2 ↑	1	1	0	0	1 ↑	0 ↓
Sport classified activities (total)	50	86 ↑	61 ↑	49	39 ↓	28 ↓	68 ↑	35 ↓
Swimming	16	20 ↑	23 ↑	15	15	10 ↓	20 ↑	13 ↓
Cycling	10	14 ↑	13 ↑	7	11	4 ↓	12 ↑	8 ↓
Running/jogging/athletics	10	14 ↑	16 ↑	6 ↓	8	3 ↓	13 ↑	6 ↓
Tennis	6	14 ↑	9 ↑	4	2 ↓	3 ↓	10 ↑	2 ↓
Golf	5	13 ↑	7 ↑	3	2 ↓	3 ↓	9 ↑	3 ↓
Basketball	5	12 ↑	6	6	1 ↓	3 ↓	8 ↑	2 ↓
Australian football	5	13 ↑	4	6	1 ↓	3 ↓	8 ↑	2 ↓
Football/soccer	4	14 ↑	4	3	1 ↓	2 ↓	8 ↑	1 ↓
Cricket	4	12 ↑	4	5	1 ↓	2 ↓	7 ↑	2 ↓
Badminton	4	7 ↑	5	4	2 ↓	2 ↓	5 ↑	2 ↓
Boxing	3	6 ↑	4 ↑	3	1 ↓	2	4 ↑	1 ↓
Bowls	2	6 ↑	2	2	1 ↓	2	4 ↑	1 ↓
Rugby league	2	7 ↑	2	3	0 ↓	1	4 ↑	1 ↓
Canoeing/Kayaking	2	4 ↑	2	2	3	1 ↓	3	2
Mountain biking	2	4 ↑	3	3	2	0 ↓	3 ↑	1 ↓
Martial arts	2	5 ↑	3	1	1 ↓	1 ↓	3 ↑	1 ↓
Surfing	2	4 ↑	3 ↑	1	1 ↓	1 ↓	3 ↑	1 ↓
Netball	2	6 ↑	1	3	1 ↓	2	3 ↑	1 ↓
Other <1%	13	25 ↑	12	14	10 ↓	8 ↓	17 ↑	9 ↓
None of these	10	0 ↓	1 ↓	22 ↑	2 ↓	32 ↑	5 ↓	15 ↑

Base: Total respondents (n=3541), Showing %. Q10. Which are the main physical activities or sports that you do?

The segments vary considerably by demographics.

Pro sport segments are more likely to be male, physically active individuals – many who are parents and also CALD and higher income. There is higher representation of ATSI in the Club Active segment. Sport ambivalent segments are more likely to be female which may suggest the need to better align ‘sport’ activities in a way more digestible or appealing to females. Similarly, there are more older Australian’s who are sport ambivalent. A high proportion of Sidelined advocates are those who have a disability suggesting specific programs / campaign to target these individuals are worthy of investment.

Table 7: Demographics by segments

Segment demographics	Total (n=3541)	Pro sport segments			Sport ambivalent segments		Pro sport segments (n=1666)	Sport ambivalent segments (n=1875)
		Club active fans (n=588)	Non club active fans (n=729)	Sidelined advocates (n=349)	Active ambivalent (n=1102)	Inactive ambivalent (n=773)		
Male	49	64 ↑	57 ↑	50	40 ↓	42 ↓	58 ↑	41 ↓
Female	51	36 ↓	43 ↓	50	60 ↑	58 ↑	42 ↓	59 ↑
18-29	22	34 ↑	18 ↓	29 ↑	18 ↓	18 ↓	26 ↑	18 ↓
30-39	18	20	18	24 ↑	16	16	20 ↑	16 ↓
40-49	17	17	17	14	18	17	16	17
50+	43	30 ↓	46	33 ↓	47 ↑	49 ↑	37 ↓	48 ↑
Parent (<18 years)	33	44 ↑	34	39 ↑	27 ↓	28 ↓	39 ↑	28 ↓
CALD	15	17	17	16	14	14	17 ↑	14 ↓
Recent migrant (<5 years)	5	6	6	7	4	3 ↓	6 ↑	4 ↓
ATSI	3	7 ↑	3	3	2 ↓	3	4 ↑	3 ↓
Disability	24	13 ↓	19 ↓	29 ↑	25	32 ↑	19 ↓	28 ↑
<\$31.3K	18	15	13 ↓	20	17	23 ↑	15 ↓	20 ↑
\$31.2K<\$78K	33	30	30	39 ↑	33	34	32	33
\$78K<\$156K	27	31 ↑	32 ↑	25	27	21 ↓	30 ↑	24 ↓
\$156K or more	9	13 ↑	11 ↑	7	8	5 ↓	11 ↑	7 ↓

Base: Total respondents (n=3541), Showing %.

Segments also varied by current occupation and level of education. Pro sport segments were more likely to have a higher level of education and be working while many ambivalent segments were retired and the inactive ambivalent segments tended to have the lowest level of education. Over half of the Club active were working or volunteering in sport.

Table 8: Other characteristics by segments

Segment demographics	Total (n=3541)	Pro sport segments			Sport ambivalent segments		Pro sport segments (n=1666)	Sport ambivalent segments (n=1875)
		Club active fans (n=588)	Non club active fans (n=729)	Sidelined advocates (n=349)	Active ambivalent (n=1102)	Inactive ambivalent (n=773)		
Working (total)	57	68 ↑	64 ↑	58	55	46 ↓	64 ↑	51 ↓
Employed full-time	37	48 ↑	43 ↑	41	31 ↓	29 ↓	45 ↑	30 ↓
Employed part-time	15	14	17	13	16	14	15	15
Employed – variable or casual hours	5	5	4	5	8 ↑	3 ↓	5	6
Unemployed	5	4	4	6	5	9 ↑	4 ↓	6 ↑
Retired or on a pension	21	15 ↓	18	15 ↓	25 ↑	26 ↑	17 ↓	25 ↑
A full-time student	5	7	5	8	5	5	6	5
Engaged in home duties	9	5 ↓	7	11	9	11	7 ↓	10 ↑
University degree or higher (including postgraduate diploma)	32	38 ↑	36	29	34	23 ↓	35 ↑	29 ↓
Undergraduate diploma or associate diploma	13	16	14	12	14	10 ↓	14	13
Certificate, trade qualification or apprenticeship	23	21	21	24	23	26	21	25
School or lower (total)	31	25 ↓	30	35	28	39 ↑	29	33
Work or volunteer with a NSO, SSO, local club / org. or in other sports related activities / events	20	55 ↑	18	21	8 ↓	14 ↓	32 ↑	10 ↓

Base: Total respondents (n=3541), Showing %.

9.4 Opportunities for segment engagement

The segmentation analysis indicates that the majority of the Australian population can be engaged further either through encouraging participation in physical activity or sport.

- Club active and non-club active fans (that make up 38% of the population) are the biggest supporters of sport in terms of participation and spectating sport and will be the biggest advocates for sport investment and development.
- Active ambivalent (38%) could benefit from education / inspiration around how 'sport' can be part of their lives – many who actually do sport related activities but they have a perceptual barrier on the idea of 'sport' and what it constitutes.
- Sidelined advocates (10%) have a desire to be involved more but are currently less active suggesting mobilisation programs to activate their positive intentions.
- The only segment that will be hard to reach are the Inactive ambivalent (22%) who are more sedentary and share few positive personal attitudes toward sport generally.

10 CURRENT PERCEPTIONS AND BENEFITS OF SPORT AND PHYSICAL ACTIVITY IN AUSTRALIA

Overall, Australians are highly convinced of the personal benefits (physical and mental) of being active – particularly for children’s development. They are also able to see broader benefits of sport to the community and economically. While agreement is not universally observed for all claims around sport at a personal and community level, few would disagree on the areas surveyed.

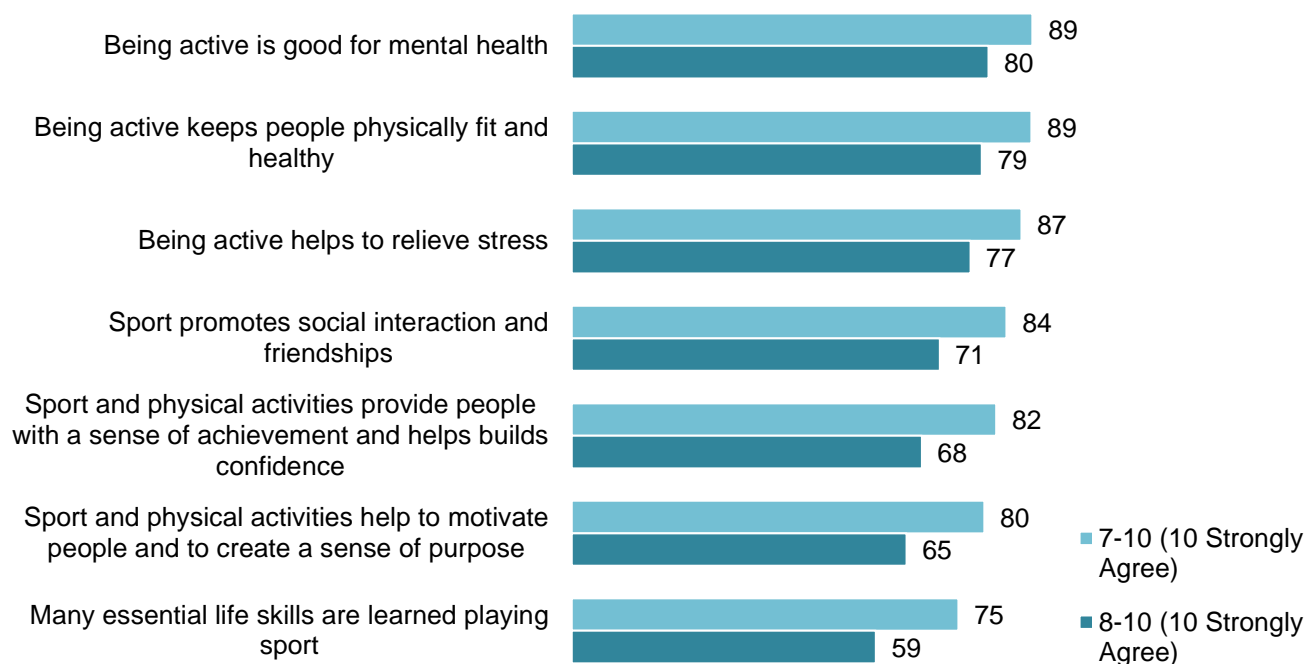
Generally, Australians agreed with most claims around sport (personal or community sport) with only a small minority who outwardly disagreed on any statement. There were however higher levels of neutral views around claims that sport provides other benefits beyond health (economic and employment, life skills, community pride etc) suggesting uncertainty rather than disagreement (see Figure 36: Overall perceptions of being active and sport – level of agreement / disagreement.)

10.1 Benefits of sport to personal life and health

Australians are convinced of the physical and mental benefits of being active and the majority also see additional benefits (social, sense of achievement, motivation).

Based on agreement of 7-10 out of 10, around 9 in 10 Australians believe being active is good for mental health (89%) and physical health (89%) and helps to relieve stress (87%). Around 8 in 10 see that sport promotes social interaction and friendships (84%), that sport and physical activities provide people with a sense of achievement and builds confidence (82%) and helps to motivate people and create a sense of purpose (80%). To a lesser degree – but still a majority view (75%), Australians believe that many essential life skills are learned playing sport.

Figure 21: Benefits of sport to personal life and health



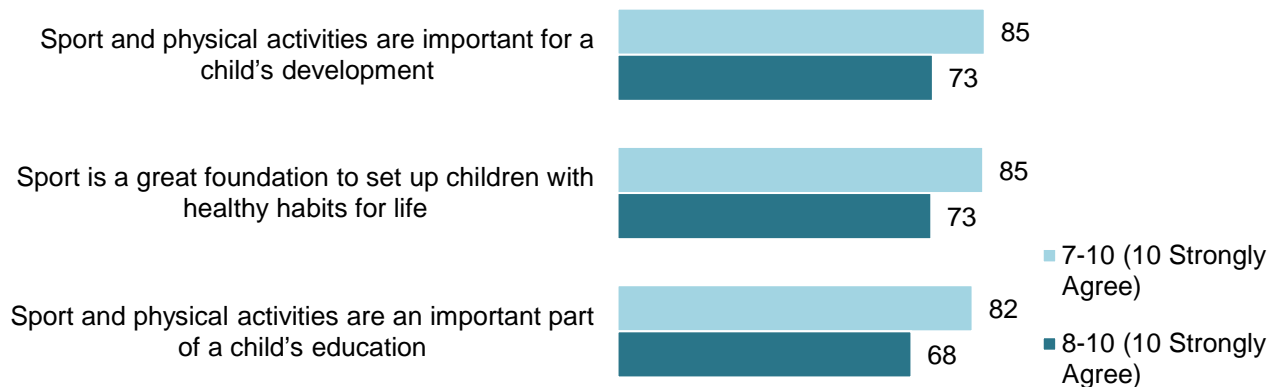
Base: Total respondents (n=3541), Showing % Agree
Q2. Please indicate your level of agreement with each statement...?

10.2 Benefits of sport for children

Sport is also seen to be important for a child's development and part of their education.

Over 8 in 10 of Australians believe that sport and physical activities are important for a child's development (85%) and an important part of their education (82%) and that sport is a great foundation to set children with health habits for life (85%).

Figure 22: Benefits of sport for children



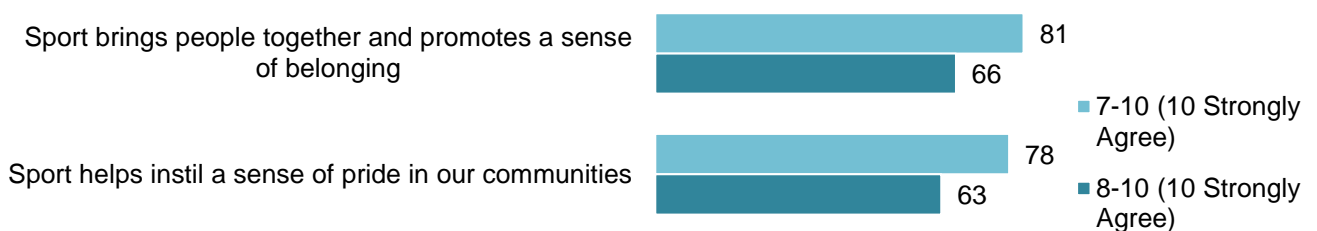
Base: Total respondents (n=3541), Showing % Agree
Q2. Please indicate your level of agreement with each statement...?

10.3 Benefits of sport for social cohesion and community

Sport has wider benefits to the community and most Australians believe that sport has benefits for social cohesion and community.

Around 8 in 10 Australians believe sport brings people together and promotes a sense of belonging (81%) and that sport helps instil a sense of pride in our communities (78%).

Figure 23: Benefits of sport for social cohesion and community



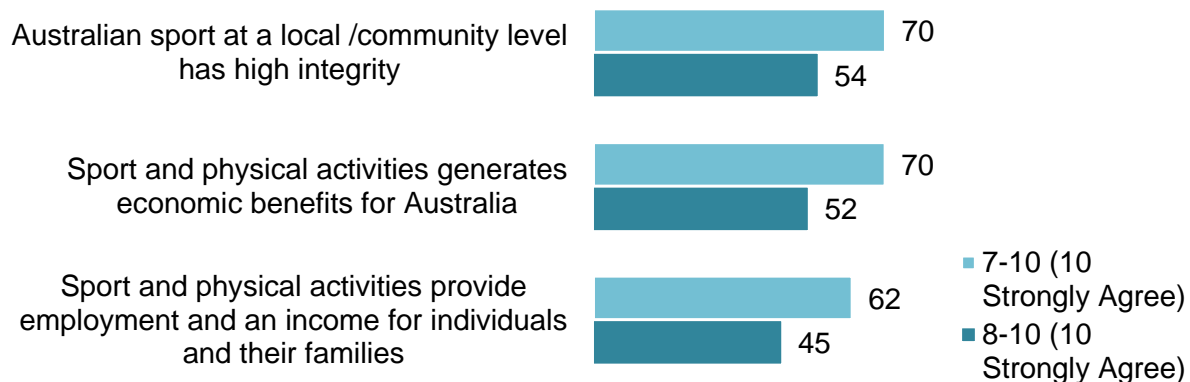
Base: Total respondents (n=3541), Showing % Agree
Q2. Please indicate your level of agreement with each statement...?

10.4 Benefits of sport economically

To a lesser extent the majority (albeit a smaller majority) feel that community sport provides economic benefits and employment for individuals

A similar proportion, 70% believe sport and physical activities generate economic benefits for Australia but fewer believe this is directly linked to employment and income for individuals (62%).

Figure 24: Benefits of sport economically



Base: Total respondents (n=3541), Showing % Agree
Q2. Please indicate your level of agreement with each statement...?

10.5 Demographic differences

The Australian community largely share these views although benefits beyond personal benefits are less likely to be held among the sport ambivalent segments.

Encouragingly, regardless of segment (and personal views / engagement with sport), the majority of Australians see the benefits of PA and sport – beyond just physical and mental health although sport specific benefits are relatively weaker among the ambivalent segments

Table 9: Perceptions and benefits of sport by segment

Segment ratings Agree	Total (n=3541)	Pro sport segments			Sport ambivalent segments		Pro sport segments (n=1666)	Sport ambivalent segments (n=1875)
		Club active fans (n=588)	Non club active fans (n=729)	Sidelined advocates (n=349)	Active ambivalent (n=1102)	Inactive ambivalent (n=773)		
Physical and mental health (total)	92	97 ↑	99 ↑	96 ↑	92	80 ↓	98 ↑	87 ↓
Being active is good for mental health	89	94 ↑	97 ↑	94 ↑	90	74 ↓	95 ↑	83 ↓
Being active keeps people physically fit and healthy	89	95 ↑	97 ↑	93 ↑	89	74 ↓	95 ↑	83 ↓
Being active helps to relieve stress	87	94 ↑	96 ↑	91 ↑	88	70 ↓	94 ↑	80 ↓
Skills and purpose (total)	90	97 ↑	98 ↑	96 ↑	87 ↓	77 ↓	97 ↑	83 ↓
Sport promotes social interaction and friendships	84	93 ↑	94 ↑	90 ↑	80 ↓	70 ↓	93 ↑	76 ↓
Sport and physical activities provide people with a sense of achievement and helps builds confidence	82	92 ↑	95 ↑	90 ↑	77 ↓	65 ↓	93 ↑	72 ↓
Sport and physical activities help to motivate people and to create a sense of purpose	80	91 ↑	93 ↑	87 ↑	74 ↓	62 ↓	91 ↑	69 ↓
Many essential life skills are learned playing sport	75	90 ↑	91 ↑	82 ↑	65 ↓	58 ↓	89 ↑	62 ↓
Social cohesion and pride (total)	84	93 ↑	96 ↑	93 ↑	77 ↓	70 ↓	94 ↑	74 ↓
Sport brings people together and promotes a sense of belonging	81	91 ↑	95 ↑	88 ↑	75 ↓	66 ↓	92 ↑	71 ↓
Sport helps instil a sense of pride in our communities	78	88 ↑	93 ↑	89 ↑	69 ↓	63 ↓	90 ↑	67 ↓
Economic benefits (total)	76	89 ↑	90 ↑	79	69 ↓	59 ↓	87 ↑	65 ↓
Australian sport at a local /community level has high integrity	70	82 ↑	85 ↑	78 ↑	62 ↓	55 ↓	82 ↑	60 ↓
Sport and physical activities generates economic benefits for Australia	70	85 ↑	86 ↑	73	62 ↓	54 ↓	83 ↑	59 ↓
Sport and physical activities provide employment and an income for individuals and their families	62	75 ↑	76 ↑	66	55 ↓	47 ↓	74 ↑	52 ↓

Base: Total respondents (n=3541), Showing %

Q2. Please indicate your level of agreement with each statement...? Showing 7-10 (10= Strongly agree)

11 CURRENT PERCEPTIONS AND BENEFITS OF HIGH PERFORMANCE / ELITE SPORT

High performance sport is positively perceived in Australia. Australians see that high performance sport has direct positive impact on national pride and our reputation as a country and as well believe – but to a lesser extent – how it has flow on benefits for the Australian community and sport participation. While agreement is not universally observed for all claims around high performance sport in Australia, few would disagree on the areas surveyed.

Generally, Australians agreed with most claims around high performance sport with only a small minority who outwardly disagreed on any statement however there were greater levels of neutral views around claims of high integrity or positive role models and community and economic benefits suggesting uncertainty rather than disagreement (see Figure 37: Overall perceptions of high performance sport – level of agreement / disagreement).

11.1 Perceptions Australia's international sporting reputation

Australians believe that Australia is respected on the international sporting stage.

The majority of Australians (75%) agree that Australia is respected on the international sporting stage.

Figure 25: Perceptions Australia's international sporting reputation



Base: Total respondents (n=3541), Showing % Agree

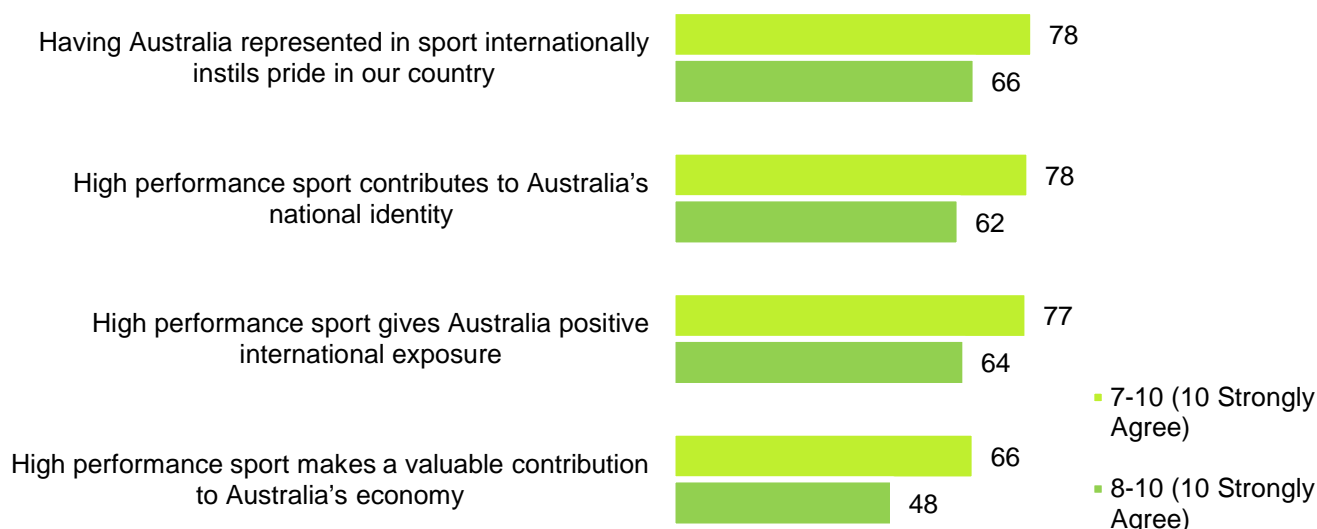
Q3. To what extent do you agree with the following statements about 'high performance' or 'elite' sport

11.2 Benefits of high performance / elite sport for Australia as a country

High performance sport is seen by most Australians to instil national pride and identity as well as positive international exposure.

The majority (8 in 10) believe that representation of Australian sport / athletes instils pride in our country (78%) and contributes to national identity (78%). It is also seen to give Australia positive international exposure (77%). Albeit to a lesser extent, high performance sport is seen make a valuable contribution to Australia's economy (66%). This latter claim is more polarising as preliminary interviews while testing the survey found that many felt high performance sport was also a cost heavy investment and therefore also cost the economy.

Figure 26: Benefits of high performance / elite sport for Australia as a country



Base: Total respondents (n=3541), Showing % Agree

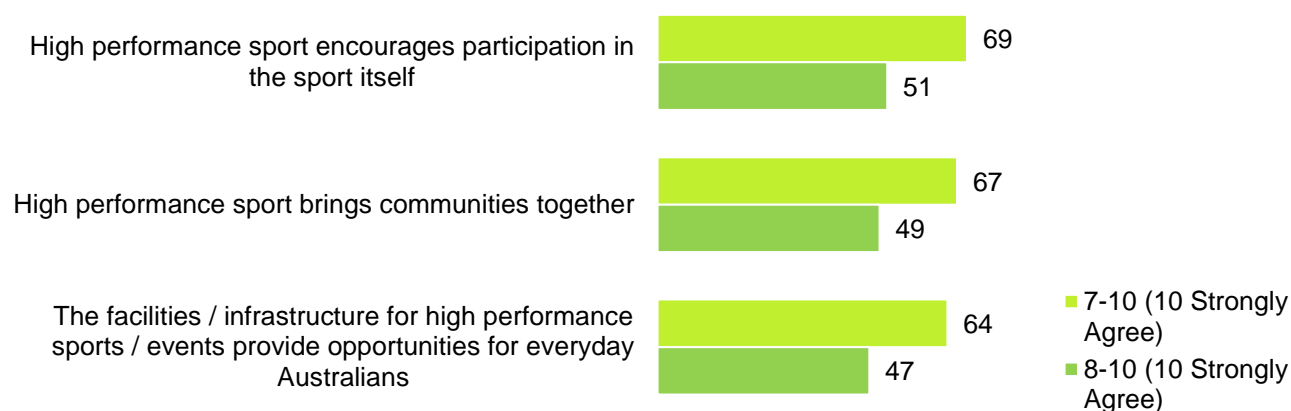
Q3. To what extent do you agree with the following statements about 'high performance' or 'elite' sport

11.3 Benefits of high performance / elite sport for communities and sport participation

High performance sport is also – but to a lesser extent – seen to provide benefits for the Australian community and sport participation

The majority of Australians (but not all) believe that high performance sport can bring communities together (67%) and has flow on effects direct to community through encouraging participation in the sport itself (69%) and providing infrastructure / facilities for participation at a local level (64%). While there was higher levels of uncertainty about these claims generally (neutral ratings) few disagreed on these claims.

Figure 27: Benefits of high performance / elite sport for communities and sport participation



Base: Total respondents (n=3541), Showing % Agree. Q3. To what extent do you agree with the following statements about 'high performance' or 'elite' sport

11.4 Demographic differences

Encouragingly, regardless of segment (and personal views / engagement with sport), the majority of Australians can see how high performance / elite sport benefits Australia – however ambivalent segments are more sceptical particularly around economic contribution, community benefits and integrity issues.

Table 10: Perceptions of high performance sport by segments

Segment ratings Agree	Total (n=3541)	Pro sport segments			Sport ambivalent segments		Pro sport segments (n=1666)	Sport ambivalent segments (n=1875)
		Club active fans (n=588)	Non club active fans (n=729)	Sidelined advocates (n=349)	Active ambivalent (n=1102)	Inactive ambivalent (n=773)		
Having Australia represented in sport internationally instils pride in our country	78	90 ↑	91 ↑	86 ↑	73 ↓	63 ↓	89 ↑	69 ↓
High performance sport contributes to Australia's national identity	78	89 ↑	91 ↑	84 ↑	71 ↓	62 ↓	89 ↑	67 ↓
High performance sport gives Australia positive international exposure	77	89 ↑	89 ↑	82 ↑	71 ↓	63 ↓	88 ↑	68 ↓
High performance sport makes a valuable contribution to Australia's economy	66	80 ↑	83 ↑	73 ↑	55 ↓	50 ↓	80 ↑	53 ↓
High performance sport encourages participation in the sport itself	69	83 ↑	85 ↑	79 ↑	58 ↓	53 ↓	83 ↑	56 ↓
High performance sport brings communities together	67	81 ↑	84 ↑	76 ↑	54 ↓	52 ↓	81 ↑	53 ↓
The facilities / infrastructure for high performance sports / events provide opportunities for everyday Australians	64	79 ↑	80 ↑	75 ↑	54 ↓	48 ↓	79 ↑	52 ↓
Australia is respected on the international sporting stage	75	86 ↑	88 ↑	80 ↑	68 ↓	60 ↓	85 ↑	65 ↓
Having Australia represented in sport internationally instils pride in our country	78	90 ↑	91 ↑	86 ↑	73 ↓	63 ↓	89 ↑	69 ↓
High performance sport contributes to Australia's national identity	78	89 ↑	91 ↑	84 ↑	71 ↓	62 ↓	89 ↑	67 ↓
High performance sport gives Australia positive international exposure	77	89 ↑	89 ↑	82 ↑	71 ↓	63 ↓	88 ↑	68 ↓

Base: Total respondents (n=3541), Showing %

Q3. To what extent do you agree with the following statements about 'high performance' or 'elite' sport? Showing 7-10 (10= Strongly agree)

12 THE VALUE AND IMPORTANCE OF INVESTMENT IN SPORT

While the importance of supporting community sport and individuals is seen to be relatively more important than investment in high performance and international sport / events - investment in high performance sport is seen to be important and there is a view that the Government has a key role in sport development and intervention.

Generally, Australians would put higher emphasis on seeing investment or support at a local / community level to encourage children and people to be active or community sport however average importance of all aspects testing are high (7 out of 10 or above).

Figure 28 Importance of investment and Government involvement in sport – average importance

It is important that...



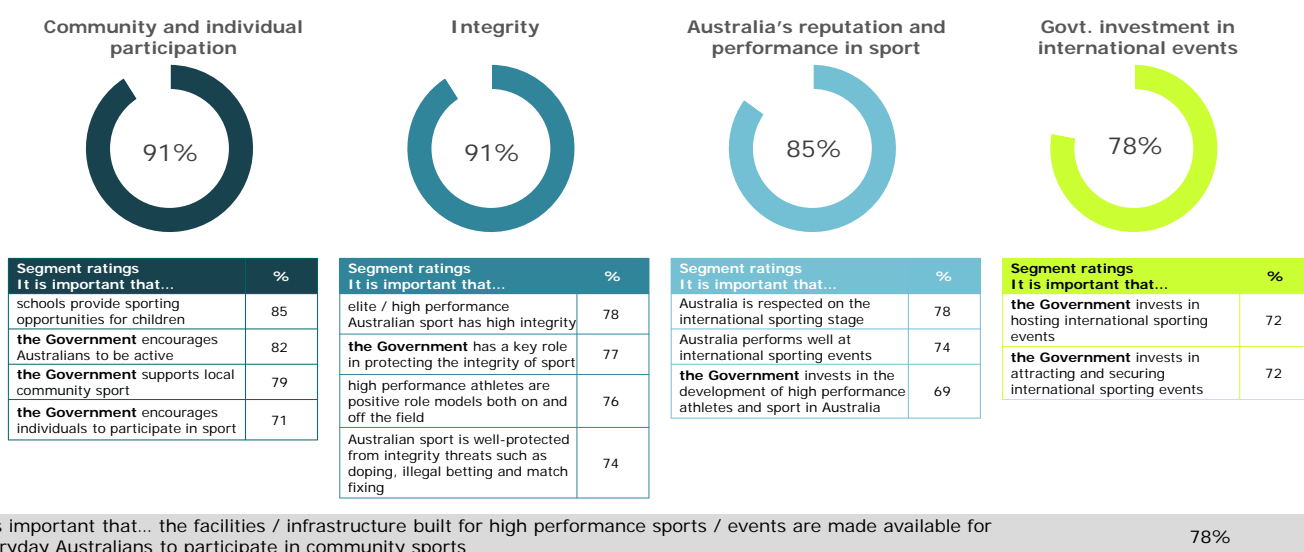
Base: Total respondents (n=3541), Showing average (0-10)

Q4. What is your level of agreement with the following statements...?: It is important for

The Government is seen to play a key role in supporting and investing in community sport as well as high performance / elite sport and talent.

- With regards to community and individual participation, Australians believe it is important that
 - schools should provide sporting opportunities for children (85%)
 - that the Government encourages Australian's to be active (82%) or to participate in sport (71%)
 - that the Government invests in local community sport (71%).
- Integrity is also seen to be important at a high performance level and nearly 8 in 10 (77%) believe it is important that the Government has a key role in protecting the integrity of sport.
- The importance of Australia's reputation and performance in sport is also high
 - 78% believe it is important Australia is respected internationally)
 - 69% believe it is important for the Government to invest in the development of high performance athletes and sport in Australia.
- There is support for Government investment in international events and Australians believe that it is important for the Government to:
 - invest in hosting international sporting events (72%)
 - invest in attracting and securing international sporting events (72%).
- There is also a view that resources (infrastructure / facilities) that are built for high performance sports or events later flow back to the community to enable them to participate in sport at a community level (78%).

Figure 29 Importance of investment and Government involvement in sport



Base: Total respondents (n=3541), Showing %

Q5. What is your level of agreement with the following statements...?: It is important for 7-10 (10=Extremely important).

Encouragingly, regardless of segment (and personal views / engagement with sport), the majority of Australians support the need for Government to invest in local sporting opportunities as well as Australia's integrity and reputation in sport at an elite level - although as expected, sport ambivalent segments were *less* likely than pro sport segments to see the importance across the areas tested.

Table 11: Importance of investment and Government involvement in sport by segment

Segment ratings It is important that...	Total (n=3541)	Pro sport segments			Sport ambivalent segments		Pro sport segments (n=1666)	Sport ambivalent segments (n=1875)
		Club active fans (n=588)	Non club active fans (n=729)	Sidelined advocates (n=349)	Active ambivalent (n=1102)	Inactive ambivalent (n=773)		
Community and individual participation (total)	91	97 ↑	98 ↑	93	91	78 ↓	97 ↑	85 ↓
schools provide sporting opportunities for children	85	93 ↑	95 ↑	90 ↑	82 ↓	70 ↓	93 ↑	77 ↓
the Government encourages Australians to be active	82	89 ↑	91 ↑	85	82	67 ↓	89 ↑	75 ↓
the Government supports local community sport	79	89 ↑	90 ↑	84 ↑	74 ↓	64 ↓	88 ↑	70 ↓
the Government encourages individuals to participate in sport	71	86 ↑	85 ↑	80 ↑	60 ↓	55 ↓	84 ↑	58 ↓
Integrity (total)	91	97 ↑	98 ↑	94 ↑	89 ↓	80 ↓	97 ↑	85 ↓
elite / high performance Australian sport has high integrity	78	88 ↑	90 ↑	85 ↑	73 ↓	65 ↓	88 ↑	70 ↓
the Government has a key role in protecting the integrity of sport	77	85 ↑	89 ↑	81	71 ↓	63 ↓	86 ↑	68 ↓
high performance athletes are positive role models both on and off the field	76	85 ↑	87 ↑	80	72 ↓	64 ↓	85 ↑	69 ↓
Australian sport is well-protected from integrity threats such as doping, illegal betting and match fixing	74	82 ↑	82 ↑	78	72 ↓	63 ↓	81 ↑	68 ↓
Talent and profile (total)	85	95 ↑	96 ↑	92 ↑	79 ↓	74 ↓	95 ↑	77 ↓
Australia is respected on the international sporting stage	78	88 ↑	90 ↑	84 ↑	71 ↓	66 ↓	88 ↑	69 ↓
Australia performs well at international sporting events	74	86 ↑	87 ↑	83 ↑	66 ↓	61 ↓	86 ↑	64 ↓
the Government invests in the development of high performance athletes and sport in Australia	69	82 ↑	86 ↑	75 ↑	59 ↓	56 ↓	82 ↑	58 ↓
Govt. investment in international events (total)	78	87 ↑	91 ↑	86 ↑	70 ↓	66 ↓	89 ↑	68 ↓
the Government invests in hosting international sporting events	72	83 ↑	86 ↑	78 ↑	63 ↓	61 ↓	83 ↑	62 ↓
the Government invests in attracting and securing international sporting events	72	82 ↑	86 ↑	81 ↑	63 ↓	59 ↓	83 ↑	61 ↓
the facilities / infrastructure built for high performance sports / events are made available for everyday Australians to participate in community sports	78	86 ↑	90 ↑	82	73 ↓	65 ↓	87 ↑	70 ↓

Base: Total respondents (n=3541), Showing %

Q4. What is your level of agreement with the following statements...?: It is important for 7-10 (10=Extremely important).

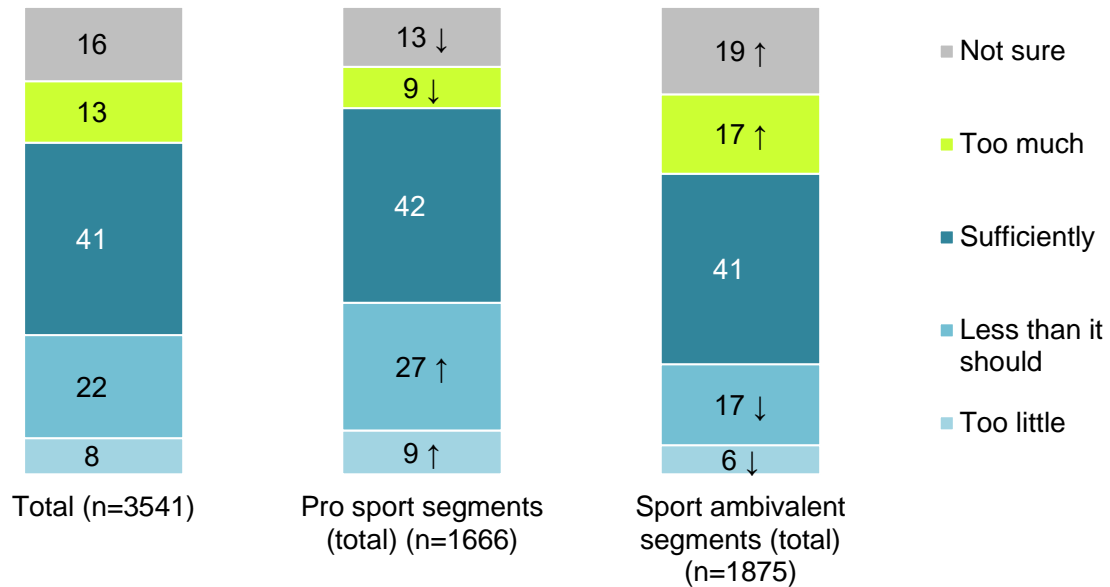
While Government funding or investment in sport is seen to be largely sufficient, many believe it is not enough.

12.1 Perceptions of Government funding / spending on sport

Just under half (41%) feel that the Australian Government is spending sufficiently and 30% feel it is not enough (22% less than it should and 8% too little. Overall only 1 in 10 (13%) feel too much is

spent by the Government on sport and this higher among sport ambivalent segments (17%). Many are uncertain with 16% of the population who are not sure about levels of funding.

Figure 30: Perceived level of Government funding



Base: Total respondents (n=3541), Showing % Note: Pro sport segments= Club active, Non-club active and Sidelined advocates.

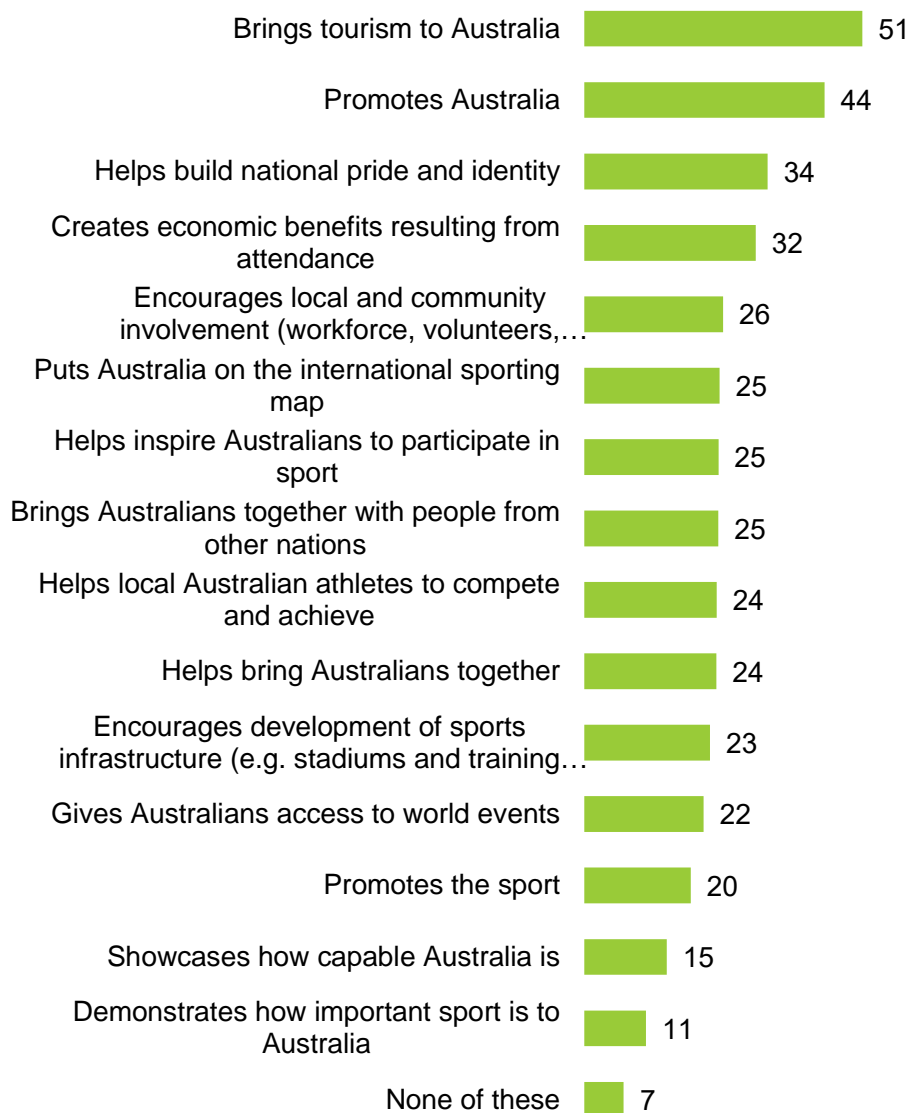
Q8. When it comes to funding or investment in sport, do you think that the Australian Government is spending...?

12.2 Reasons to invest in international sporting events in Australia

Australians see several reasons for investing in international sporting events held in Australia – in particular bringing tourism to Australia and promoting Australia more generally as well as building national pride / identity and the economic benefits from attendance.

When asked whether it is was important for the Government to invest in international events, the majority of Australian's agreed --in hosting international sporting events (72%) or in attracting and securing international sporting events (72%). The key reasons why are largely around brining tourism to Australia (51%) and promoting Australia generally (44%). Building national pride an identity are also drivers (34%) as are economic benefits from attendance (32%), encouraging local/ community involvement (26%), putting Australia on the map (25%) and also how it encourages the sport (25% inspiring Australian's to participate in sport) and bringing nations together (25%). Other benefits (less than 25%) included providing facilities and opportunities to participate in sport, bringing Australian's together and promoting the sport.

Figure 31: Reasons to invest in international sporting events in Australia



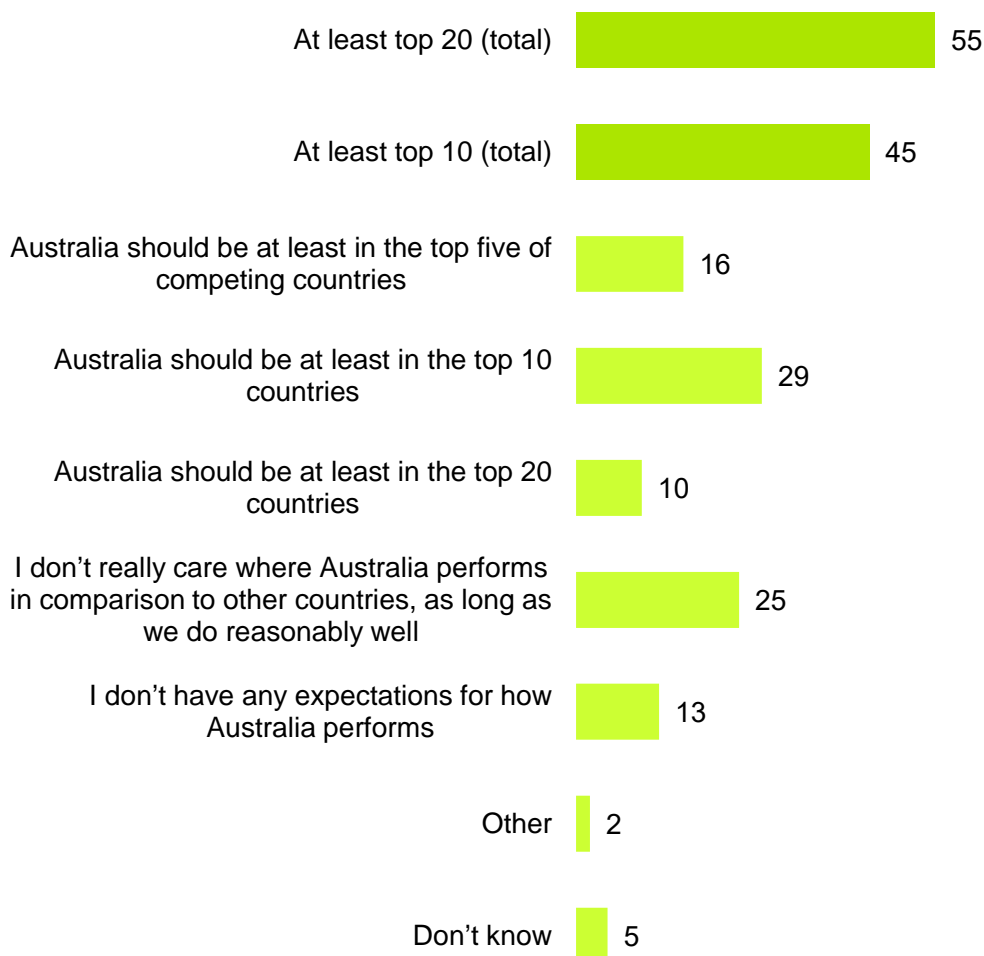
Base: Total respondents (n=3541), Showing % Q17. 5 most important reasons why Australia should invest in hosting international sporting events held in Australia?

13 EXPECTATIONS OF PERFORMANCE

Australians have high expectations around how Australia performs internationally in sport

Most Australians have some expectations about Australia's international performance – nearly half (45%) expect Australia to be in the top 10 ten countries and over half (55%) expect Australia to be in the top 20. However just under 2 in 5 (16%) would expect top 5 performance from Australia. Expectations are higher among 'pro-sport' segments. Only 1 in 10 (13%) don't have any expectations. This reflects responses that 'it is important that...Australia performs well at international sporting events' (74%).

Figure 32: Expectations of Australia's competitive performance internationally



Base: Total respondents (n=3541), Showing %

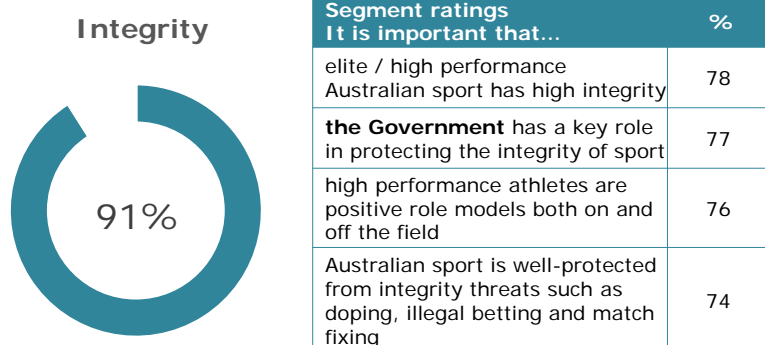
Q 7. Thinking about when Australia competes internationally (like the Olympics, Paralympics), which best describes how you feel about Australia's performance?

14 INTEGRITY IN SPORT

Integrity is seen to be of key importance in sport however, this is an area the public are not necessarily assured about in high performance sport in Australia.

When asked about level of importance, 78% Australians believed it is important that elite / high performance sport has high integrity and 74% that Australian sport is well protected from integrity threats such as doping, illegal betting and match fixing. Similarly, 76% believe high performance athletes are positive role models both on and off the field. The Government is seen to have a key role in protecting the integrity of sport (77%).

Figure 33: Importance of sport integrity



Base: Total respondents (n=3541), Showing %
Q5. What is your level of agreement with the following statements...?: It is important for 7-10 (10=Extremely important).

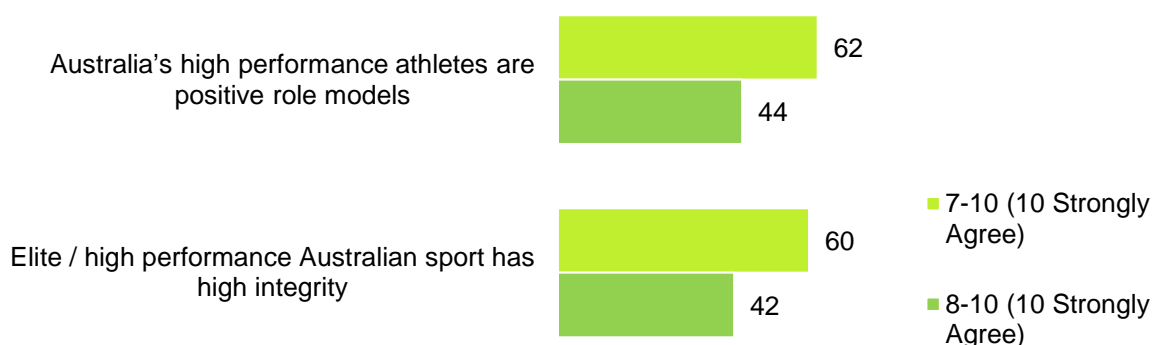
14.1 Perceptions of integrity in high performance / elite sport

Not all Australians believe that high performance sport has high integrity or that are positive role models.

While a majority view, not all are convinced that high performance athletes are positive role models (62% agreement) or that it has high integrity (60% agreement). Interviews while testing the survey suggest that while generally athletes can play a role of being good role models and that the sport is largely high in integrity, few 'bad cases' can blacken the overall sport and these are observed in media. Across the range of responses on integrity related claims, other responses were mainly neutral responses (neither 4-6 out of 10) rather than outright disagreement suggesting this is a grey area for the public (see

Figure 37: Overall perceptions of high performance sport – level of agreement / disagreement).

Figure 34: Perceptions of integrity in high performance / elite sport



Base:

Total respondents (n=3541), Showing % Agree

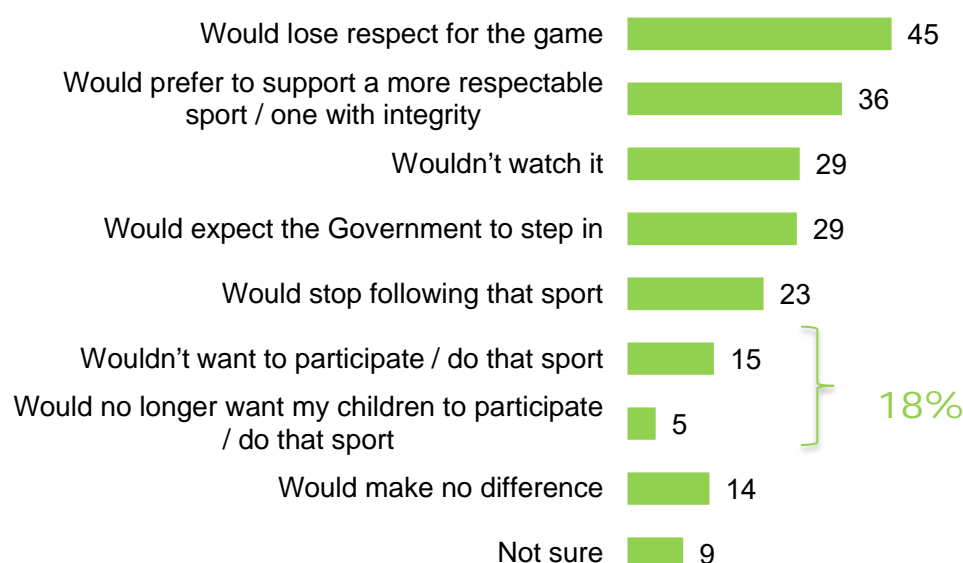
Q3. To what extent do you agree with the following statements about 'high performance' or 'elite' sport

14.2 Implications of compromised integrity in Australian sport

The main risk to high performance / elite sport if was seen to lack integrity is Australian's losing respect for the game and subsequently losing its fans / following.

The main consequences of compromised integrity for high performance / elite sport are that Australian's would lose respect and followers for the game (64%). This is made up of the individual responses that they would lose respect for the game (45%), would prefer to support a more respectable sport (36%), wouldn't watch it (29%), and would stop following that sport (29%). Three in ten (29%) would expect the Government to step in and 1 in 5 (18%) claim it would impact participation – 15% wouldn't want to participate and 5% would not want their children to participate in the sport. Only a minority (14%) feel it would make no difference.

Figure 35: Impact if high performance / elite sport lacks integrity



Base: Total respondents (n=3541), Showing %

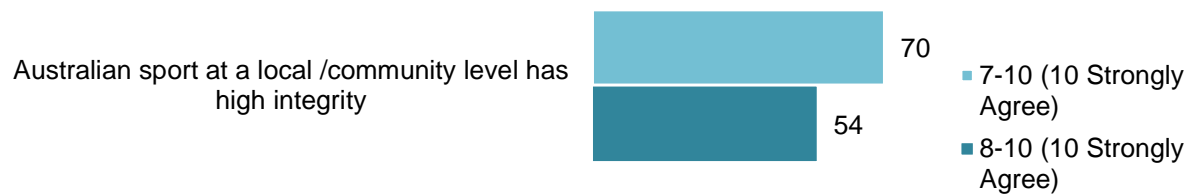
Q 6. If you thought high performance / elite level sport in Australia lacked integrity, how do you think it would change how you engaged with sport? Please select up to three responses.

14.3 Perceptions of integrity in local / community sport

Australians largely believe local / community sport has high integrity

Around 7 in 10 (70%) Australians believe that Australian sport at a local / community level have high integrity. Initial interviews to test the survey suggest that some are unsure of this claim and some heard issues in the media or from experience to contest this.

Figure 36: Integrity of local / community sport



Base: Total respondents (n=3541), Showing % Agree. Q2. Please indicate your level of agreement with each statement...?

15 CONCLUSIONS AND RECOMMENDATIONS

15.1 Conclusions

It is evident that physical activity and sport are integral to Australian lives and the community, and the value of sport to the community and the country is evident – regardless of whether individuals are participants in sport. That said there is a gap between perceptions and participation, and sport continues to carry some perceptual barriers when it comes to participation for some individuals. Overall Australians, regardless of whether they are personally inclined or ambivalent to sport, DO support investment in sport – at a community level and for high performance / elite sports in regards to providing opportunities, talent development and investment in international events. Australians also expect to see Australia do well when competing internationally – and they believe that Australia is well regarded on the international sporting stage. Integrity is very important and compromised integrity will have consequences in terms of audiences and as well participation in the sport.

Communications to the Australian public around sporting goals and investment should focus on leveraging benefits to the community and country as a whole and it is important that the Government is seen to be championing this as Australians do see the Government to be a key regulator or have a role in intervention if required. Given the public are largely convinced about personal benefits (health, mental wellbeing) but relatively less so on how higher investment areas such as high performance sport and sporting facilities can directly benefit them, an area of communication can be around emphasising (or demonstrating) the direct flow on to individuals, economically, for participation or the social / cultural benefits.

15.2 Recommendations

This survey carries a wide range of data of interest to the ASC and for future consideration. When it comes to the development of the National Sports Plan in particular, we recommend these findings are triangulated with the other elements of intelligence gathering and consultation including from individuals, community groups, sporting organisations, businesses and government. The analysis of results suggests there are opportunities for the Plan to consider both program, policy and communication strategies which will need to be consolidated with other findings from the consultation. However, on the basis of this survey alone we make the following comments and recommendations about each of the four key pillars of the National Sports Plan:

With regards to the four pillars of interest...

Participation

While Australia is a nation that is keen to participate in sport, we know that there remains a number of barriers in place that affect participation.

The research identified both barriers and opportunities to increase physical activity in Australia:

- The perceived importance of sport for adults is lower than that of general physical activity (58% vs. 81%)
- The perceived importance of sport for children is higher than for adults (77% vs. 58%)
- Three in ten (29%) are not doing any physical activity or doing it fortnightly or less
- More participate in physical activity than sport classified activities (72% vs. 50%)
- Nearly 4 in 10 (38%) of Australians want to do more sport. Even 34% of non-active or less active Australian's want to do more.
- Some populations (females, older Australians, those with disabilities, lower income, less educated) are less engaged or convinced about the benefits of physical activity and sport and also are less active.

It is acknowledged that currently programs and initiatives are in place to address some of these gaps (for example female participation) however the National Plan should address these as collective goals and efforts.

- *Firstly, addressing barriers to 'sport' participation is required. We recommend the selection of a small number of barriers, and that the National Sports Plan outlines some specific initiatives or recommendations for government consideration to commence addressing these barriers.*
 - *For example this could include addressing 'misconceptions' around what is sport or in practice insuring those key motivations for participation (social, enjoyment etc.) continue to be experienced among participants, particularly children where participation is high in youth and then drops at adult ages.*
 - *Another example is addressing the barrier of time and what it means to be involved in 'sport' by providing means or suggestions for participation that may better fit into people's various lifestyles.*
- *Secondly, given positive attitudes to physical activity are largely already established (more so than sport), there are opportunities to convert and activate individuals to do more or get involved. This requires behavioral interventions and strategies or tactical efforts (rather than education per se). Setting some personal challenges (take a walk once a week) or encouraging or developing workplace activities to encourage staff to be active.*
- *Key groups to address are females and older Australians (50 years plus).*

Whilst it is not realistic to consider 100% participation in sport, we recommend that the National Sports Plan sets a general target across the population (or by certain demographics if this is more useful) to aim towards, i.e.

- *Target 2020: 100% physical activity of any form at least once a week*
- *Target 2020: 70% adult participation in a sporting classified activity and 100% for children.*

Performance

Australians consider that Australian performance in sport is important, and contributes to both national pride and identity, positive international exposure as well as grassroots sporting participation.

- Having Australia represented in sport internationally instils pride in our country (78%)
- High performance sport contributes to Australia's national identity (78%)
- High performance sport gives Australia positive international exposure (77%)
- High performance sport encourages participation in the sport itself (69%).

Australians do expect Australia to perform well internationally:

- Nearly half (45%) expect Australia to be in the top 10 countries and over half (55%) expect Australia to be in the top 20.

This could be a target (top 10) while top 5 could be a stretch target however it is important to consider the specific sports and Australia's current performance.

However, there are some questions as to how the high performance sport directly impacts the community – it appears that while conceptually Australians can see links but evidence is not always visible / tangible.

- High performance sport makes a valuable contribution to Australia's economy (66%)

We recommend that the National Sports Plan considers the development of a metric of sorts that measures the grassroots flow on effect from high performance sport to community engagement. This could be developed in conjunction with an appropriate university partners or economists, but could become an ongoing measure, similar to a social capital measure, that determines levels of cohesion and benefit to high performance sport.

- *If this measure (or similar) is already in place, we recommend the National Sports Plan puts in place a Communication Strategy to educate and inform key target audiences of this metric, and the positive impact for Australian communities.*
- *Specific messaging around this could clearly demonstrate the economic value or flow on effect in terms of participation.*

Preventative health

Similarly, it is widely accepted that being 'active' has direct impact on health and mental wellbeing however there continues to be a gap between beliefs and action.

Again there are opportunities to further engage and inspire Australians, business, institutions to view 'being active' as a long term goal and it is understood that there are statistics / analysis that can directly demonstrate the link and benefits of physical activity.

- *This could include direct links to lower risks or benefits to individuals (ability to do xxx with children, family) to say workplaces (reduced absenteeism etc).*

Given the public already has exposure to numerous health outcomes, should communications be used to engage the public or public institutions (workplaces, schools, educational institutions etc.)

messaging will need to be tested to be unique or strengthened to show direct impact and benefits supported by participation strategies to enable intentions to be translated to action.

However, given there are already positive attitudes and beliefs around the role of physical activity and sport in preventative health implications, behavioral solutions (tactical or initiatives to facilitate participation) would be more impacting than further education in this area.

Integrity

Integrity is seen to be core to the value of sport in Australia however, selected events can tar the overall reputation of Australian sport (particularly at a high performance level).

- Not all are convinced that high performance athletes are positive role models (62% agreement) or that it has high integrity (60% agreement).

Importantly, the Government is seen to have a key role in protecting the integrity of sport (77%).

The Plan should consider the need to address this from a governance perspective seeing Australians accept the Government's role to intervene in issues of integrity in sport.

There is a role for taking a public stand on matters of sport integrity and addressing how and what is expected of the athletes, management and organisations involved (from grassroots to high performance (and high visibility) sporting organisations to health professionals) whether this be from a regulatory stance or even symbolically, and across the sporting levels from grassroots, schools to high performance competitive sport.

- *For example, can relevant parties and individuals take a 'Pledge' to commit to respect and integrity of participation?*

Given this research touched lightly on integrity, it will be beneficial to analyse other available research (or further explore) this area to identify the key issues for public concern at all levels of sport.

16 APPENDIX A: ADDITIONAL TABLES

Table 12: Engagement with sport by demographics

Column %	Total (n=3541)	Male (n=1687)	Female (n=1854)	18-29 (n=722)	30-39 (n=636)	40-49 (n=646)	50+ (n=1537)	Parent (<18 years) (n=1170)	CALD (n=544)	LOTE (n=545)	Disability (n=853)	Recent migrant (<5 years) (n=166)
Health and fitness are an important part of my life	62	63	61	59	62	60	64	60	70 ↑	68 ↑	53 ↓	72 ↑
Supports and watches sport (total)	57	68 ↑	47 ↓	60	58	56	56	61 ↑	61	65 ↑	51 ↓	66 ↑
Watching / following sport is a big part of my life	39	51 ↑	27 ↓	42	42	38	36 ↓	44 ↑	39	43 ↑	32 ↓	45
Sport is an important part of my life	38	50 ↑	27 ↓	46 ↑	43 ↑	38	32 ↓	47 ↑	43 ↑	48 ↑	27 ↓	53 ↑
I am an avid follower of competitive Australian sport	37	49 ↑	26 ↓	38	41	37	36	42 ↑	34	41	33 ↓	41
I actively follow / watch when Australia competes internationally in sport	44	53 ↑	36 ↓	42	44	44	45	48 ↑	47	50 ↑	41	49
Invests in watching sport (total)	32	40 ↑	24 ↓	42 ↑	40 ↑	31	23 ↓	41 ↑	34	42 ↑	24 ↓	45 ↑
I frequently attend live sports matches / events	22	28 ↑	16 ↓	33 ↑	29 ↑	21	14 ↓	30 ↑	25	32 ↑	15 ↓	41 ↑
I invest time and money in watching / following sport	27	34 ↑	20 ↓	35 ↑	34 ↑	28	19 ↓	36 ↑	29	36 ↑	20 ↓	37 ↑
I would like to do more sports	38	42 ↑	33 ↓	52 ↑	49 ↑	38	25 ↓	51 ↑	45 ↑	51 ↑	31 ↓	64 ↑
Rejects sport (total)	45	41 ↓	48 ↑	47	44	44	44	43	52 ↑	54 ↑	51 ↑	48
Sports clubs are NOT for people like me	33	29 ↓	36 ↑	34	32	30	34	30 ↓	39 ↑	39 ↑	40 ↑	36
I don't really get why people are so into sports	20	21	19	26 ↑	21	21	16 ↓	22 ↑	21	26 ↑	23 ↑	26
Playing sports as part of a club is too competitive	27	26	28	30 ↑	27	27	24 ↓	28	31 ↑	34 ↑	29	34 ↑

Base: Total respondents (n=3541), Showing %

Q13. What is your level of personal agreement with the following statements 7-10 (10=Strongly Agree)

A segmentation of the market

Table 13: Watching / following sport by demographics

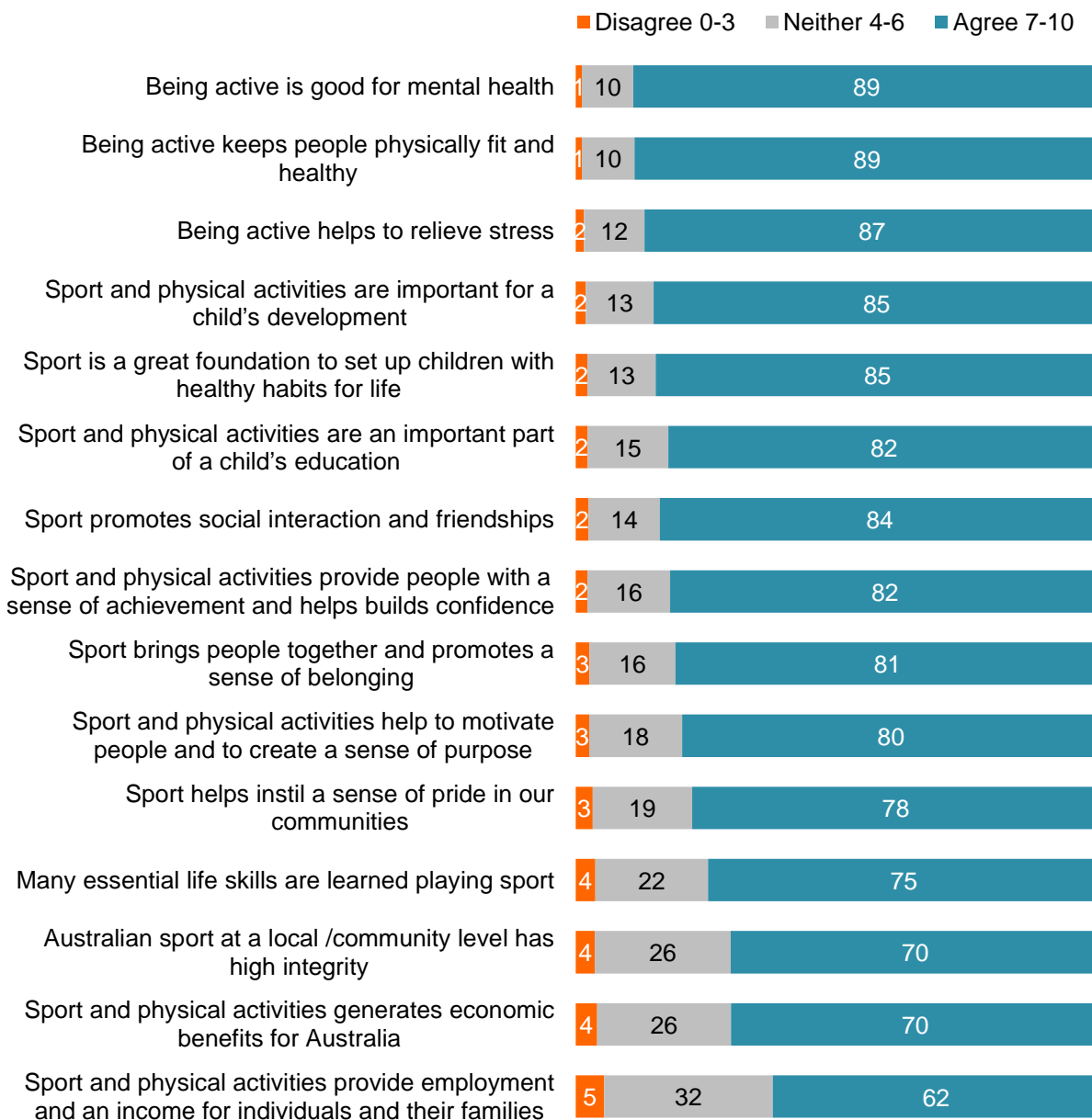
Column %	Total (n=3541)	Male (n=1687)	Female (n=1854)	18-29 (n=722)	30-39 (n=636)	40-49 (n=646)	50+ (n=1537)	Parent (<18 years) (n=1170)	CALD (n=544)	LOTE (n=545)	Disability (n=853)	Recent migrant (<5 years) (n=166)
Watch sport												
Watch sport weekly	48	61 ↑	35 ↓	45	50	46	50	67 ↑	51	46	49	45
Watch sport fortnightly	58	70 ↑	46 ↓	57	59	57	59	77 ↑	62 ↑	56	59	54 ↓
Actively invest in spectator sport	32	40 ↑	24 ↓	42 ↑	40 ↑	31	23 ↓	58 ↑	41 ↑	34	42 ↑	24 ↓
I actively follow / watch when Australia competes internationally in sport (7-10 agreement)	44	53 ↑	36 ↓	42	44	44	45	65 ↑	48 ↑	47	50 ↑	41

Base: Total respondents (n=3541), Showing %

*I frequently attend live sports matches / events + I invest time and money in watching / following sport

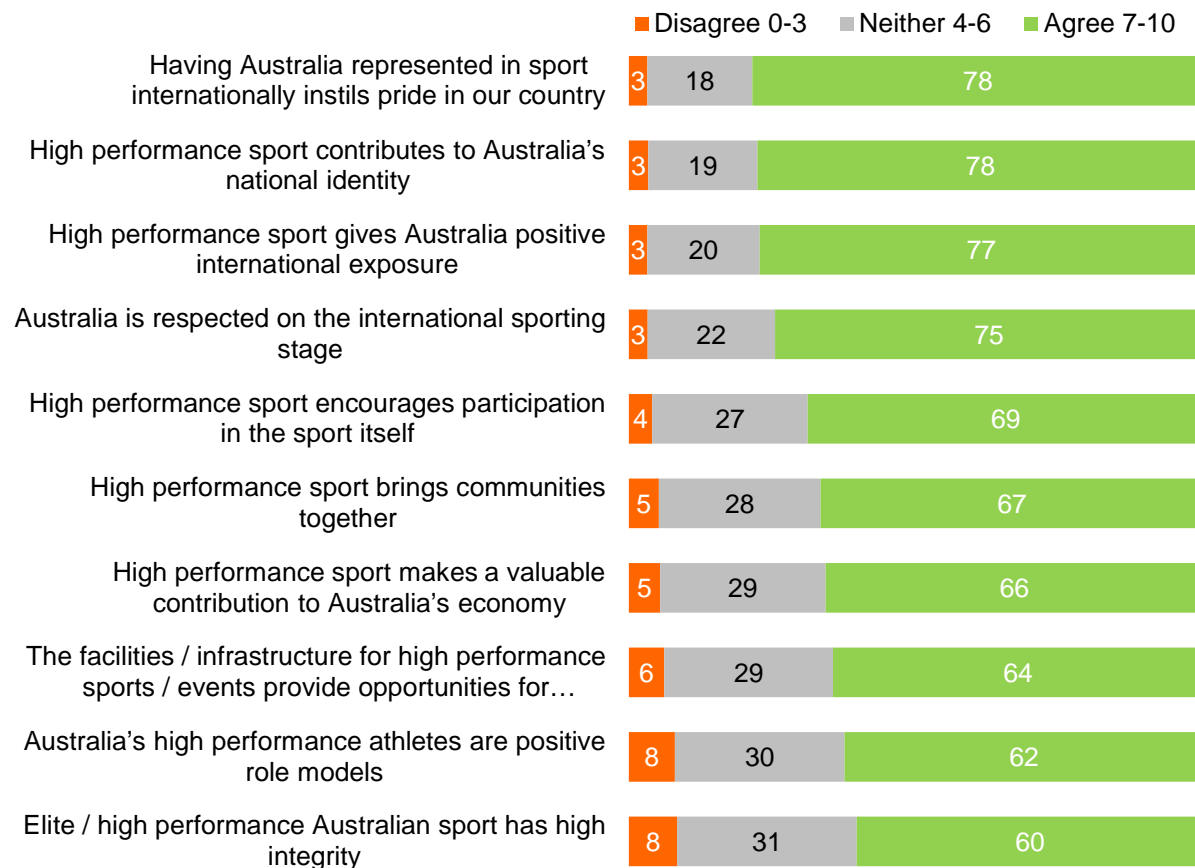
Q15B. How often would you watch or follow sports, whether it be on TV, at a live game etc? Q13. What is your level of personal agreement with the following statements...?: I actively follow / watch when Australia competes internationally in sport

Figure 37: Overall perceptions of being active and sport – level of agreement / disagreement



Base: Total respondents (n=3541), Showing % Agree
Q2. Please indicate your level of agreement with each statement...?

Figure 38: Overall perceptions of high performance sport – level of agreement / disagreement



Base: Total respondents (n=3541), Showing % Agree

Q3. To what extent do you agree with the following statements about 'high performance' or 'elite' sport

Table 14: Main types of physical activity / sport by demographics

Column %	Total (n=3541)	Male (n=1687)	Female (n=1854)	18-29 (n=722)	30-39 (n=636)	40-49 (n=646)	50+ (n=1537)	Parent (<18 years) (n=1170)
Non sport classified (total)	72	66 ↓	77 ↑	67 ↓	70	73	74 ↑	70
Walking (Recreational)	55	46 ↓	63 ↑	43 ↓	46 ↓	55	64 ↑	50 ↓
Fitness/Gym	21	21	21	29 ↑	27 ↑	21	14 ↓	23
Bush walking	14	13	14	18 ↑	13	15	11 ↓	14
Yoga	9	4 ↓	13 ↑	14 ↑	13 ↑	7	5 ↓	12 ↑
Pilates	5	2 ↓	8 ↑	7 ↑	5	4	4 ↓	6 ↑
Dancing (recreational)	6	2 ↓	9 ↑	6	7	6	4 ↓	6
Fishing (recreational)	6	8 ↑	4 ↓	6	5	5	6	6
Rock climbing/Abseiling/Caving	1	1	1	2 ↑	1	1	0 ↓	1
Sport classified activities (total)	50	58 ↑	43 ↓	67 ↑	60 ↑	53	37 ↓	62 ↑
Swimming	16	15	18	17	15	18	16	17
Cycling	10	13 ↑	7 ↓	9	12	13 ↑	9	12 ↑
Running/jogging/athletics	10	11 ↑	8 ↓	15 ↑	16 ↑	13 ↑	3 ↓	14 ↑
Tennis	6	6	6	9 ↑	7	5	4 ↓	7
Golf	5	10 ↑	1 ↓	4	4	6	7 ↑	5
Basketball	5	7 ↑	3 ↓	13 ↑	7 ↑	3 ↓	1 ↓	8 ↑
Australian football	5	8 ↑	2 ↓	11 ↑	7 ↑	4	1 ↓	8 ↑
Football/soccer	4	7 ↑	2 ↓	10 ↑	6	4	1 ↓	6 ↑
Cricket	4	7 ↑	2 ↓	8 ↑	7 ↑	4	1 ↓	7 ↑
Badminton	4	4	3	7 ↑	7 ↑	3	1 ↓	6 ↑
Boxing	3	3	3	6 ↑	6 ↑	2	0 ↓	5 ↑
Bowls	2	3 ↑	2 ↓	3	1 ↓	1	3	2
Rugby league	2	3 ↑	1 ↓	5 ↑	4 ↑	3	0 ↓	5 ↑
Canoeing/Kayaking	2	2	2	4 ↑	1	2	2	2
Mountain biking	2	3 ↑	1 ↓	3	2	3 ↑	1 ↓	3
Martial arts	2	3 ↑	1 ↓	4 ↑	3	2	1 ↓	3 ↑
Surfing	2	3 ↑	1 ↓	3	2	2	1 ↓	2
Netball	2	1 ↓	3 ↑	5 ↑	2	2	0 ↓	3 ↑
Other <1%	13	15 ↑	11 ↓	15	12	11	13	12
None of these	10	9	11	8	8	9	13 ↑	7 ↓

Column %	Total (n=3541)	CALD (n=544)	Recent migrant (<5 years) (n=166)	ATSI (n=118)	Disability (n=853)	<\$31.2K (n=623)	\$31.2K< \$78K (n=1152)	\$78K< \$156K (n=961)	\$156K or more (n=308)
Non sport classified (total)	72	69	71	57 ↓	69	67 ↓	71	76 ↑	71
Walking (Recreational)	55	46 ↓	42 ↓	28 ↓	58	52	55	58	48 ↓
Fitness/Gym	21	23	28	18	14 ↓	14 ↓	18 ↓	26 ↑	34 ↑
Bush walking	14	14	16	15	13	11	16	15	12
Yoga	9	14 ↑	20 ↑	12	6 ↓	8	8	10	7
Pilates	5	4	5	9	4	4	5	5	5
Dancing (recreational)	6	8 ↑	11 ↑	10	5	7	5	5	4
Fishing (recreational)	6	4	5	9	8 ↑	8 ↑	6	5	5
Rock climbing/Abseiling/Caving	1	1	1	4 ↑	1	1	1	1	2
Sport classified activities (total)	50	56 ↑	65 ↑	75 ↑	36 ↓	40 ↓	49	56 ↑	64 ↑
Swimming	16	19	14	25 ↑	17	14	14 ↓	19 ↑	19
Cycling	10	13 ↑	14	13	8 ↓	7 ↓	10	12	15 ↑
Running/jogging/athletics	10	13 ↑	16 ↑	9	4 ↓	6 ↓	7 ↓	13 ↑	16 ↑
Tennis	6	10 ↑	12 ↑	7	2 ↓	4	5	8 ↑	7
Golf	5	3 ↓	2	10	5	3 ↓	5	7 ↑	8
Basketball	5	9 ↑	13 ↑	13 ↑	2 ↓	6	4	4	8 ↑
Australian football	5	5	8	14 ↑	2 ↓	5	5	4	8 ↑
Football/soccer	4	6 ↑	8	8	2 ↓	4	4	5	7 ↑
Cricket	4	10 ↑	18 ↑	16 ↑	2 ↓	4	5	3	8 ↑
Badminton	4	11 ↑	17 ↑	11 ↑	2 ↓	3	4	4	3
Boxing	3	4	6 ↑	9 ↑	1 ↓	3	4	3	3
Bowls	2	2	1	8 ↑	2	3	3	2	2
Rugby league	2	2	3	12 ↑	2	2	3	2	2
Canoeing/Kayaking	2	1	1	4	2	2	2	2	3
Mountain biking	2	2	4	8 ↑	2	3	2	2	4 ↑
Martial arts	2	2	1	5 ↑	1	2	2	3	2
Surfing	2	1	1	3	1	1	2	2	4 ↑
Netball	2	1	1	3	1	1	2	2	3
Other <1%	13	13	11	22 ↑	14	14	13	13	12
None of these	10	8	3 ↓	7	17 ↑	14 ↑	11	6 ↓	5 ↓

Base: Total respondents (n=3541), Showing %

Q10. Which are the main physical activities or sports that you do?

17 APPENDIX B: QUESTIONNAIRE

UNDERSTANDING COMMUNITY PERCEPTIONS TO SPORT – 2017

- 15 MINUTE ONLINE SURVEY WITH NATIONALLY REPRESENTATIVE SAMPLE OF AUSTRALIANS AGED 18 YEARS AND ABOVE
- QUOTAS ON AGE, GENDER AND LOCATION

N=3500

INTRODUCTION. FIRST SCREEN SHOWN

On behalf of the Australian Government, Essence Communications is conducting a survey to find out about attitudes towards Sport and physical activities.

The information you provide will help inform the Australian Government's involvement and support for sport in Australia. The survey will take approximately 15 minutes to complete, depending on your answers.

A progress bar will appear in the screen to show how far you are through the survey.

Essence Communications is an independent market research firm conducting research on behalf of the Australian Government. We adhere to the market research principles set by the Australian Market and Social Research Society and we abide by the principles of the *Privacy Act 1988*.

The information and opinions you provide will be used only for research purposes. The results will only be used once combined with the answers of others. Your individual responses will be anonymous.

Thanks for your time and if you are ready to start the survey, please click on the button below.

INSTRUCTION SCREEN – SECOND SCREEN SHOWN:

Before we start, just a few simple instructions on completing this survey:

Instructions for each question will appear on screen. Most questions simply ask you to click in the appropriate box, or boxes corresponding to your answer.

After answering each question, a button at the bottom of the screen will take you to the next question.

Please consider your answers carefully; you cannot go back during the survey. Please DO NOT use the 'back' button on your internet browser.

Please stay in the survey until you are finished, do not switch between windows.

Please note that the survey closes at midnight on Monday 3 July 2017.

SCREENER

Firstly a few questions to help us understand who we are speaking to...

S 1. Are you...?

Please select one response

Male	
Female	
Other	

S 2. What is your age?

Please type your age in years

NUMERICAL TEXT BOX

DP TO TERMINATE IF <18 YEARS

S 3. Where do you live?

Please select one response

Sydney	
Other NSW	
Melbourne	
Other VIC	
Brisbane	
Other QLD	
ACT	
Adelaide	
Other SA	
Perth	
Other WA	
Darwin	
Other NT	
Hobart	
Other TAS	

Outside Australia	TERMINATE
-------------------	-----------

S 4. Do you have any children who live with you...?

Please select one response only.

Yes at least one under 5 years of age		
Yes at least one between the ages of 5-12 years		PARENT
Yes at least one between the ages of 13-17 years		PARENT
Yes, all over the ages 18 years		
No		

(NOTE TO DP TO CLASSIFY PARENTS AS 5-17 YEARS)

CHECK QUOTAS (age, gender, location)

IF QUOTAS FULL: Thank you, however we have filled the quotas for people of your description.
Thanks and have a good day.

MAIN SURVEY

SPORT - WHAT IS IT?

ASK ALL

Q 1. Thinking about sport in Australia, what comes to mind?

What do you associate with sport? What it means to Australians, to Australia ...?

Please type your response in the boxes below.

You will need to provide at least one response in the first box to continue.

DP TO PROVIDE 5 BOXES.

CURRENT PERCEPTIONS OF SPORT / BENEFITS

ASK ALL

Q 2. "Thinking now about any **physical activity** done specifically for the purposes of **sport**, **exercise** or **recreation**... please indicate your level of agreement with each statement.

- By **sport** we mean any **sport-related activities**, for example, team sports (basketball, football, Australian football, cricket, netball, etc.), athletics (including running and jogging), swimming, cycling, golf, etc.
- By **exercise** we mean anything you do for fitness such as going to the gym, doing a workout/fitness activities.
- By **recreation** we mean anything you do for fun in your spare time which is **physically active** such as dancing or going for a bush walk.

Please select one response per statement.

ROTATE	0 – Strongly Disagree			5 Neither				10 – Strongly Agree
Being active keeps people physically fit and healthy								
Being active is good for mental health								
Being active helps to relieve stress								
Many essential life skills are learned playing sport								
Sport brings people together and promotes a sense of belonging								
Sport helps instil a sense of pride in our communities								
Sport and physical activities help to motivate people and to create a sense of purpose								
Sport and physical activities provide people with a sense of achievement and helps								

builds confidence								
Sport and physical activities provide employment and an income for individuals and their families								
Sport and physical activities generates economic benefits for Australia								
Sport and physical activities are an important part of a child's education								
Sport promotes social interaction and friendships								
Sport and physical activities are important for a child's development								
Sport is a great foundation to set up children with healthy habits for life								
Australian sport at a local /community level has high integrity								

CURRENT PERCEPTIONS OF HIGH PERFORMANCE SPORT / BENEFITS

ASK ALL

Q 3. To what extent do you agree with the following statements about '**high performance**' or '**elite**' sport?

- By this we mean elite athletes or sports people who represent their country at the highest level in their sport

Please select one response per statement.

ROTATE	0 – Strongly Disagree			5 Neither				10 – Strongly Agree
High performance sport brings communities together								
High performance sport encourages participation in the sport itself								
Having Australia represented in sport internationally instils pride in our country								
High performance sport contributes to Australia's national identity								
High performance sport gives Australia positive international exposure								
Australia's high performance athletes are positive role models								
The facilities / infrastructure for high performance sports / events provide opportunities (facilities, sporting grounds etc) for everyday Australians to participate in community sports								
High performance sport makes a valuable contribution to Australia's economy								
Elite / high performance Australian sport has high integrity								
Australia is respected on the international sporting stage								

CURRENT VALUE JUDGEMENTS

ASK ALL

Q 4. What is your level of agreement with the following statements...?

- By **sport** we mean any **sport-related activities**, for example, team sports (basketball, football, Australian football, cricket, netball, etc.), athletics (including running and jogging), swimming, cycling, golf, etc.
- By **exercise** we mean anything you do for fitness such as going to the gym, doing a workout/fitness activities.
- By **recreation** we mean anything you do for fun in your spare time which is **physically active** such as dancing or going for a bush walk.

Please select one response per statement.

DO NOT ROTATE	0 – Strongly Disagree			5 Neither				10 – Strongly Agree
It is important for <i>adults</i> to participate in physical activity for sport, exercise or recreation								10
It is important for <i>adults</i> to participate in sport								5
DP TO SPACE OUT THESE STATEMENTS								
It is important for <i>children and youth</i> to participate in physical activity for sport, exercise or recreation								10
It is important for <i>children and youth</i> to participate in sport								7

CAROUSEL STYLE QUESTION

ASK ALL

Q 5. Here are some more statements about investment and support for sport in Australia. How *important* do you think each of the following are?

Please select one response per statement.

ROTATE	Not at all important - 0	5 Neither	Extremely important - 10
That schools provide sporting opportunities for children							
That the Government supports local community sport							
That the Government encourages Australians to be active							
That the Government encourages individuals to participate in sport							
That the Government invests in the development of high performance athletes and sport in Australia							
That the Government invests in hosting international sporting events							
That the Government has a key role in protecting the integrity of sport							
That Australia performs well at international sporting events							
That high performance athletes are positive role models both on and off the field							
That the Government invests in attracting and securing							

international sporting events							
That elite / high performance Australian sport has high integrity							
That Australia is respected on the international sporting stage							
That the facilities / infrastructure built for high performance sports / events are made available for everyday Australians to participate in community sports							
That Australian sport is well-protected from integrity threats such as doping, illegal betting and match fixing							

ASK ALL

Q 6. If you thought high performance / elite level sport in Australia lacked integrity, how do you think it would change how you engaged with sport?

Please select up to three responses.

RANDOMISE

Wouldn't watch it
Wouldn't want to participate / do that sport
Would no longer want my children to participate / do that sport PARENT ONLY
Would lose respect for the game
Would expect the Government to step in
Would stop following that sport
Would prefer to support a more respectable sport / one with integrity
Would make no difference
Other (specify)
Not sure

ASK ALL

Q 7. Thinking about when Australia competes internationally (like the Olympics, Paralympics), which best describes how you feel about Australia's performance?

Please select one response only

ROTATE

Australia should be at least in the top five of competing countries	
Australia should be at least in the top 10 countries	
Australia should be at least in the top 20 countries	
I don't really care where Australia performs in comparison to other countries, as long as we do reasonably well (i.e. get some medals)	
I don't have any expectations for how Australia performs	
Other (specify)	
Don't know	

SK ALL

Q 8. When it comes to funding or investment in sport, do you think that the Australian Government is spending...?

Please select one response only

Too little	1	Go to 9b
Less than it should	2	Go to 9b
Sufficiently	3	Go to 9b
Too much	4	Go to 9b
Not sure	9	

ASK IF Q8=1-4

Q8b. Why do you say that?

OPEN-ENDED

PERSONAL ATTITUDES AND PARTICIPATION IN SPORTS

ASK ALL

Q 9. How often do you participate in physical activities like sport, exercise or recreation?

- By **sport** we mean any **sport-related activities**, for example, team sports (basketball, football, Australian football, cricket, netball, etc.), athletics (including running and jogging), swimming, cycling, golf, etc.
- By **exercise** we mean anything you do for fitness such as going to the gym, doing a workout/fitness activities.
- By **recreation** we mean anything you do for fun in your spare time which is **physically active** such as dancing or going for a bush walk."

Please select one response only

At least 7 times a week or more		DOES PA
5-6 times a week		
3-4 times a week		
1-2 times a week		
Once every two weeks		
Once every month		
Once every few months		
Less often		
I don't exercise		

ASK ALL

Q 10. . Which are the main physical activities or sports that you do?

Please select all that apply,

Australian football	HAS MAINPA OR SPORT
Badminton	
Basketball	
Bowls	
Boxing	
Bush walking	

Canoeing/Kayaking	
Cricket	
Cycling	
Dancing (recreational)	
Equestrian	
Fishing (recreational)	
Fitness/Gym	
Football/soccer	
Golf	
Hockey	
Martial arts	
Motor cycling	
Mountain biking	
Netball	
Pilates	
Rock climbing/Abseiling/Caving	
Rugby league	
Rugby union	
Running/jogging/athletics	
Ski & snowboard	
Surfing	
Swimming	
Tennis	
Touch football	
Volleyball (indoor and outdoor)	
Walking (Recreational)	
Yoga	

Other (specify)	
None of these	

ASK ALL 'DOES PA' OR 'HAS MAIN PA/SPORT'

Q 11. Would you say that your participation in sport / physical activity...?

Makes a significantly positive contribution to your life	
Makes a positive contribution to your life	
Makes little contribution to your life	
Has a negative contribution to your life	
Can't say	

ASK ALL

Q 12. In the last 12 months, did you participate in any sport or physical activities, as part of a Sports club or association that required payment of fees, membership or registration?

Note that this does not include fitness, leisure or indoor sports centres that required payment for participation, or physical activity courses from commercial entities.

Yes (participated in club sport in last 12 months)	
No	

Q 13. Below are some things that people have said about sport and physical recreation, as well as sports clubs. What is your level of personal agreement with the following statements...?

Please select one per statement.

ROTATE	Strongly disagree - 0	1	2	3	4	5	6	7	8	9	Strongly agree - 10
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Sports clubs are NOT for people like me											
I don't really get why people are so into sports		1	2	3	4	5	6	7	8	9	10
Playing sports as part of a club is too competitive		1	2	3	4	5	6	7	8	9	10
I would like to do more sports		1	2	3	4	5	6	7	8	9	10
Watching / following sport is a big part of my life											
Sport is an important part of my life											
Health and fitness are an important part of my life											
I am an avid follower of competitive Australian sport											
I actively follow / watch when Australia competes internationally in sport											
I frequently attend live sports matches / events											
I invest time and money in watching / following sport											

ASK ALL

Q13b. What would you consider your **main** hobbies or interests that you regularly do/participate in outside of work/school/university?

Please select up to **five** responses.

ROTATE

Playing / participating / training in sport or physical activity	
Attending sporting events/Watching sporting events on TV	
Computer / video / mobile games	
Socialising with friends	
Socialising with family	
Surfing the net / Using social media (e.g. Facebook, You tube)	
School volunteer/Volunteer charity work	
Playing music/singing/Listening to music	
Watching TV / Films	
Going to the movies	
Reading	
Acting	
Attending theatre and musical events	
Painting/drawing/arts and crafts	
Gardening	
Cooking	
Dining out	
Other (specify)	
None of these	

MOVED UP

ASK ALL

Q 15b. How often would you watch or follow sports, whether it be on TV, at a live game etc?

Please select one response only

Every day	
At least once a week	
At least once every fortnight	
At least once a month	
At least once a quarter	
At least once every 6 months	
Less than every 6 months	
I don't watch or follow sports	

IF PARENT

Q 14. Do your children who are aged between 5-17 years do any organised sport, exercise or recreation outside of school hours? By organised, we mean activities that were arranged by a club, association, school or other type of organization.

Yes, all my children aged between 5-17 years	1
Yes, some of my children aged between 5-17 years	2
No, none of them	3

IF PARENT

Q15. Of your child / children aged between 5-17 years, what would you consider are your child's/children's **main** hobbies / interests or other activities that they regularly do/participate in outside of school?

Please select up to **five** responses.

ROTATE

Playing / participating / training in sport or physical activity	
Attending sporting events/Watching sporting events on	

TV	
Painting/drawing/Arts and crafts	
Computer / video / mobile games	
Socialising with friends	
Socialising with family	
Surfing the net/Using social media (e.g. Facebook, You tube)	
Playing a musical instrument/Singing/Listening to music	
Watching TV, DVD's / Video's	
Going to the movies	
Reading	
Drama/Acting	
Attending theatre and musical events	
Homework and other study	
Other (specify)	
None of these	

Moved q15 UP

NEEDS AND MESSAGE TESTING

ASK ALL

Q 16. Thinking about your experience doing sport / physical activities, what do you think are the most important things to improve how sport is delivered at a community level?

OPEN ENDED

ASK ALL

Q 17. What do you think are the 5 most important reasons why Australia should invest in hosting international sporting events held in Australia?

Hosting international sporting events...

Please select up to five reasons

RANDOMISE

Puts Australia on the international sporting map	
Brings tourism to Australia	
Creates economic benefits resulting from attendance	
Encourages development of sports infrastructure (e.g. stadiums and training facilities)	
Helps local Australian athletes to compete and achieve	
Encourages local and community involvement (workforce, volunteers, supporters, participants, spectators)	
Gives Australians access to world events	
Helps bring Australians together	
Helps inspire Australians to participate in sport	
Helps build national pride and identity	
Showcases how capable Australia is	
Brings Australians together with people from other nations	
Demonstrates how important sport is to Australia	

Promotes the sport	
Promotes Australia	
Other (specify)	
None of these	

FURTHER PROFILING

And finally a few questions to help us understand your responses.

ASK ALL

Q 18. Do any of the following describe you...?

Please select all that apply

ROTATE

Work or volunteer with a national sporting organisation
Work or volunteer with a state sporting organisation
Work or volunteer with a local sporting club / organisation
Work or volunteer in any other sports related activities or events
Other sports related (specify)
None of these

These next few questions are now about you, to make sure that we are speaking to a good cross-section of people. Your answers will of course be treated in the strictest of confidence.

ASK ALL

Q 19. What is the postcode of the suburb/area where you live?

Please type in your postcode

ASK ALL

Q 20. What is the highest educational qualification you have completed?

University degree or higher (including postgraduate diploma)
--

Undergraduate diploma or associate diploma
Certificate, trade qualification or apprenticeship
Year 12
Year 10-11
Year 9 or below
Never went to school
Still at secondary school
Other (please specify)
Don't know

ASK ALL

Q 21. Which of the following best describes your personal working situation?

Employed full-time
Employed part-time
Employed – variable or casual hours
Unemployed
Retired or on a pension
A full-time student
Engaged in home duties
Other (specify)

We are now going to ask some questions which may be sensitive. (These include questions on cultural background, disability, sexual orientation and income.)

ASK ALL

Q 22. Are you of Aboriginal or Torres Strait Islander origin?

Please select one response

Yes	
-----	--

No	
----	--

ASK ALL

Q 23. In which country were you born?

Please select one response

FOR QUOTAS

Australia	
Bosnia and Herzegovina	CALD
Cambodia	CALD
Canada	
China	CALD
Croatia	CALD
Egypt	CALD
Fiji	CALD
France	CALD
Germany	CALD
Greece	CALD
Hong Kong	CALD
India	CALD
Indonesia	CALD
Iran	CALD
Iraq	CALD
Italy	CALD
Japan	CALD
Lebanon	CALD
Macedonia	CALD
Malaysia	CALD
Malta	CALD
Netherlands	CALD
New Zealand	
Pakistan	CALD
Papua New Guinea	CALD
Philippines	CALD

Poland	CALD
Republic of Ireland	
Romania	CALD
Serbia Montenegro	CALD
Singapore	CALD
South Africa	CALD
South Korea	CALD
Sri Lanka	CALD
Taiwan	CALD
Thailand	CALD
Turkey	CALD
United Kingdom	
United States	
Vietnam	CALD
Zimbabwe	CALD
Other country where a language other than English is the main language (specify)	CALD
Other country where English is the main language (specify)	

ASK ALL

Q 24. Do you speak a language other than English at home?

Please select one response

Yes	1	LOTE
No	2	
Prefer not to say	98	
Don't know	99	

ASK LOTE

Q 25. What languages other than English do you speak at home?

Please select all that apply

Italian	2
Greek	3
Cantonese	4
Mandarin	5
Arabic	6
Vietnamese	7
German	8
Spanish	9
Tagalog (Filipino)	10
Hindi	11
Macedonian	12
Croatian	13
Korean	14
Turkish	15
Polish	16
Other (specify)	96
Prefer not to say	98
Don't know	99

IF NOT BORN IN AUSTRALIA (Q 23. In which country were you born?)

Q 26. How long have you lived in Australia?

1. 5 years or less
2. 6-10 years
3. More than 10 years

Q 27. Do you currently have a disability or physical condition that restricts your life in some way which is likely to (or has lasted) 6 months or more?

1. Yes
2. No
3. Don't know

Q 28. The results from the next question will assist Government in making sport as inclusive as possible, for all Australians. Which best describes you?

Please select one response only.

1. Heterosexual or straight
2. Gay or lesbian
3. Bisexual
4. Transgender
5. Transsexual
6. Intersex
7. Other
8. Not sure
9. Prefer not to say

Q 29. Which best describes your household / living situation?

Please select one response only.

1. Couple with children
2. Couple without children
3. Single with children
4. Single without children
5. Sharing with other adults
6. Living with parents
7. Other (specify)

Q 30. What is your approximate HOUSEHOLD income?
(This includes income from wages and salaries, government benefits, pensions, allowances and any other income you usually receive, before deductions for tax, superannuation contributions, health insurance, amounts salary sacrificed, or any other automatic deductions.)

1. \$1-\$199 per week (\$1-\$10,399 per year)
2. \$200-\$299 per week (\$10,400-\$15,599 per year)
3. \$300-\$399 per week (\$15,600-\$20,799 per year)
4. \$400-\$599 per week (\$20,800-\$31,199 per year)

- | | |
|------------------------------|--------------------------------|
| 5. \$600-\$799 per week | (\$31,200-\$41,599 per year) |
| 6. \$800-\$999 per week | (\$41,600-\$51,999 per year) |
| 7. \$1,000-\$1,249 per week | (\$52,000-\$64,999 per year) |
| 8. \$1,250-\$1,499 per week | (\$65,000-\$77,999 per year) |
| 9. \$1,500-\$1,999 per week | (\$78,000-\$103,999 per year) |
| 10. \$2,000-\$2,499 per week | (\$104,000-\$129,999 per year) |
| 11. \$2,500-\$2,999 per week | (\$130,000-\$155,999 per year) |
| 12. \$3,000-\$3,499 per week | (\$156,000-\$181,999 per year) |
| 13. \$3,500-\$3,999 per week | (\$182,000-\$207,999 per year) |
| 14. \$4,000-\$4,999 per week | (\$208,000-\$259,999 per year) |
| 15. \$5,000 or more per week | (\$260,000 or more per year) |
| 16. Negative income | |
| 17. Nil income | |
| 18. Prefer not to answer | |

That is the end of the survey. Thank you very much for your time. Your responses will help inform future planning and support for sport in Australia.