

SPORTS



DRIVERS OF PARTICIPATION
FRAMEWORK



THE REQUIREMENT

Sport Australia engaged Nielsen Sports to identify, and achieve consensus around, the drivers and barriers for sport participation. The desired outcome was to enhance sports' participation strategies and improve the coalescence of stakeholders (sporting organisations and governments) around participation plans.

In developing the Drivers of Participation Framework, Nielsen Sports adopted a co-design approach, ensuring the content of the framework was not simply tested with the sector – it was developed by the sector, for the sector. Nielsen Sports have used their global network of expertise and experience to refine and build on the content generated by stakeholders at all levels of the industry.

The following outputs and actions were significant in building the final participation framework:

- Understanding and challenging the previous literature prepared by and for Sport Australia regarding barriers and drivers to participation
- Clearly defining the theory to be used in the framework, the key terms (drivers, outcomes, elements) and their dynamic relationship
- Reviewing existing literature to identify significant sport consumption drivers as well as consumption drivers from other industries
- Identifying key sports trends and social trends
- Collaborating with the sector at all levels of sport's administration
- Identifying crucial positive or negative outcomes occurring at a consumer-level and an organisation-level
- Identifying the participation drivers critical to delivering positive outcomes and preventing negative outcomes
- Developing the driver elements of each driver as a consideration set for sports to assess their performance and develop new strategies
- Developing example performance measures for sports to consider tailoring and including in their own plans
- Identifying relevant case studies from within and outside of sport, to highlight how other organisations are effectively implementing participation drivers and developing initiatives in line with current consumer trends
- Gathering insights from the sector as to how the framework, and the subsequent tool needs to be prepared, communicated and implemented within the sector.

DRIVERS OF PARTICIPATION FRAMEWORK

The drivers were developed through a straw-man framework. Initial learnings were taken from existing Sport Australia documentation. These learnings were tested and refined through a desktop review of available literature from within and outside the sports sector. The drivers were then tested and further refined with stakeholders from all levels of the sports sector, including the Sport Australia, National Sporting Organisations, State Sporting Organisations, and representatives from community sport. The iterative process resulted in the final nine drivers listed and defined below. The drivers create the positive and negative outcomes occurring at an organisation-level and consumer-level.



MARKET INSIGHTS

The collection of evidence on current and potential participants; and the operating environment



PRODUCT DESIGN

The development of a product with benefits and features to meet consumer needs and wants



WORKFORCE

The means by which products are delivered to the market



MARKETING & COMMUNICATIONS

The messages and methods sports use to communicate internally and to consumers



INFRASTRUCTURE & EQUIPMENT

The provision of appropriate, accessible and affordable facilities and equipment



COMMERCIAL

The development of sustainable participation products and the commercialisation of related assets



GOVERNANCE

The governance structure of the organisation and the behaviours of the board



UNIFIED BEHAVIOURS

The whole-of-sport approach taken to the delivery of the sport



MANAGEMENT

The experience, expertise and performance of the management team

Driver Elements

The driver elements are developed for sports as considerations for the effective implementation of each of the nine drivers.

The elements form a priority consideration set for sports when developing or implementing their participation plans. Sports are able to review themselves against the elements; and build relevant initiatives off the back of areas identified for performance improvement.

Each set of driver elements is also accompanied by example performance measures for sports to include in their plans.

GOVERNANCE



An organisational governance structure that understands and values participation

The governance driver represents the Board and its supporting committee structure. The driver considers elements including independence, policies and procedures, sub-committees, board meetings and the skills of Board directors.

A sport which optimises this driver will:

- Ensure Board members understand the participation component of the business and its operating environment

Elements: Sports should assess themselves against the driver, including their performance against the priority consideration set.

As a sport, do we...

Structure

- have established board sub-committees to assist in providing specific information to assist the decision making process?

Behaviours

- work with our stakeholders' Boards to ensure a consistent strategic direction for the whole-of-sport
- have a process for inducting new Directors to ensure they understand the participation component of the business?
- assess the board skills mix to ensure it is appropriate to meet the participation goals of the NSO?
- implement an appropriate system whereby the Board is regularly informed by management about how the organisation is tracking on its participation performance?

Example Performance Measures: driver-specific measures for sports' plans

- CEO's satisfaction with support received from the Board increased from X to Y% by 2020

MANAGEMENT



The experience, expertise and performance of the management team

The management driver represents the experience and expertise of the management team; the people management skills and processes; the planning processes put in place; and the skills and processes of the organisation in relation to finance and risk. The driver considers elements including mentoring programs; induction processes; participation planning methodologies and processes; and risk management planning.

A sport which optimises this driver will:

- Appoint a diverse leadership team with experience relevant to drive participation outcomes for the sport
- Embed processes to effectively develop, implement and measure performance against participation plans

Elements: Sports should assess themselves against the driver, including their performance against the priority consideration set.

As a sport, do we...

Experience and expertise

- assess our leadership team to ensure they have diverse and relevant experience, and identify gaps?

People Management

- develop staff and participation performance measures in line with the SMART principles?
- have a process to educate employees and volunteers to identify potential ethical and legal issues in their areas of responsibility?
- have processes and policies in place to provide a safe, inclusive and supportive environment for members and the community?

Planning

- have an operational plan mapped to the current strategic plan, with scheduled monitoring and reviewing?
- have a participation plan, incorporated within, or aligned to, our strategic plan?
- undertake competitor analysis and a broader analysis of the external environment in which our sport operates?
- measure our progress against participation plans regularly and with the use of evidence?
- ensure our participation plans specifically aim for a safe, fair and inclusive sport?
- ensure staff are held accountable for the delivery of the operational plan?

Finance & Risk

- have a documented risk management plan and identification process, used by the organisation?
- assess the ROI for potential investments and compare to suitable alternatives?
- develop a business case for each major participation project prior to the organisation committing resources?

Example Performance Measures: driver-specific measures for sports' plans

- Staff turnover reduced from X to Y by 2020
- Overall staff satisfaction increased from X to Y% by 2020
- Primary source of revenue as a proportion of total revenue decreased from X to Y% by 2020
- Total funding and grant revenue increased by X% by 2020

UNIFIED BEHAVIOURS



The whole-of-sport approach taken to the delivery of the sport

The alignment driver represents the systems and structures within the sport, as well as the behaviour of all internal stakeholders within the sport. The driver considers elements including nationally aligned finance systems; consistent approaches to workforce management; implementing national databases; and undertaking whole-of-sport strategic planning processes.

A sport which optimises this driver will:

- Be working towards common systems, processes and databases within the sport
- Conduct whole-of-sport planning to ensure common goals and agreed roles and responsibilities

Elements: Sports should assess themselves against the driver, including their performance against the priority consideration set.

As a sport, do we...

Systems & Structures

- have a single national entity for all forms of participation, from juniors through to high performance, with horizontal integration of sport disciplines?
- have a consistent approach to workforce management leading to well-resourced people management systems providing greater opportunity to attract, retain and develop excellent staff for the sports?
- have integrated databases for all of the sport's participants?
- have common platforms, including digital platforms, across the sport?
- have aligned collection, distribution and analysis of participation and broader consumer data?
- explore opportunities for shared services with your sport?
- have whole-of-sport aligned policies and procedures?
- align our child-safe practices across all levels of the sport [despite jurisdictional differences]?

Behaviours

- develop whole-of-sport participation plans with a common set of goals?
- develop participation plans which provide flexibility for state-based plans to address relevant local issue?
- develop participation plans in collaboration with, and endorsed by, all members?
- develop participation plans with clear roles and responsibilities across the management of the whole sport?
- collaborate and consult with key stakeholders when making strategic decisions for the sport?
- have a stakeholder management plan to ensure stakeholders are engaged and consulted appropriately?

Example Performance Measures: driver-specific measures for sports' plans

- Satisfaction of stakeholders regarding strategy collaboration increased from X to Y% by 2020
- Satisfaction of stakeholders regarding aligned policies and procedures increased from X to Y% by 2020
- Satisfaction of stakeholders regarding aligned roles and responsibilities increased from X to Y% by 2020

MARKET INSIGHTS



The collection of evidence on current and potential participants; and the operating environment

The market insights driver represents the appropriate data collection within sports and the ability to draw key insights relevant to participation planning. The driver considers elements including strong data governance processes; collecting regular data for analysis; understanding how consumers engage with the sport; understanding the main reasons for satisfaction and dissatisfaction with their sport experience; and understanding the environment which sport operates within

A sport which optimises this driver will:

- Seek out and analyse existing, relevant, and publicly available research
- Design and conduct research to address knowledge gaps regarding consumers and the industry
- Offer simple and convenient ways for consumers to provide feedback

Elements: Sports should assess themselves against the driver, including their performance against the priority consideration set.

As a sport, do we...

Data Collection

- have the capability to collect, store, collate and analyse data from multiple internal and external sources?
- have strong data governance processes in place to ensure the integrity, security, quality, and privacy of data?
- utilise existing, relevant, and publicly available research?
- regularly capture new data and evaluate it?
- capture data relevant to our sport's plans?
- offer simple and convenient ways for consumers to provide continued feedback and input?
- access external expertise when required to assist with the capturing of relevant and valuable data and insights?
- utilise our digital platforms to support the collection and analysis of data?

As a sport, do we analyse...

Key Insights

- how current/potential consumers engage with our sport?
- how our consumer segments vary in their motivations, behaviours and preferences?
- what time of day, and which days, current/potential participants prefer to participate?
- the preferred participation duration of our current/potential consumers?
- how far consumers have to travel to participate in our sport?
- how our consumers travel to the venues where they participate?
- the overall satisfaction of our consumers, and what contributes to the level of satisfaction/dissatisfaction?
- what our consumers are most satisfied and dissatisfied with?
- what recommendations our current/potential consumers have to make our offering more enjoyable?
- the retention levels, satisfaction levels and preferences for each gender?

- how often participants in our sport get injured?
- the types of injuries occurring and their cause?
- the level of perceived injury risk within our sport?
- the physical limitations of older Australians and why some don't feel they can participate in our sport?
- the optimal price point for our products?
- what our competitors offers and how much they are charging for their products?
- how our brand is viewed by current/potential consumers?

Example Performance Measures: driver-specific measures for sports' plans

- Data on current consumers' motivations, attitudes and behaviours is collected and analysed annually to 2020
- Data on potential consumers' motivations, attitudes and behaviours is collected and analysed annually to 2020
- Publicly available data on sports consumers is collected and analysed annually to 2020
- Number of sports participants registered on the national database with complete data increased from X to Y by 2020
- Overall satisfaction with the participation experience to increase from X% to Y% by 2020

PRODUCT DESIGN



The development of a product with benefits and features to meet consumer needs and wants

The product design driver represents the design process undertaken by the sport, as well as the mapping of key features to the desired benefits of the consumer. The driver considers elements including co-designing products with the sport's key stakeholders; testing product concepts with consumers; designing non-competitive product offerings; and offering products which cater for the specific needs of key consumer segments.

A sport which optimises this driver will:

- Utilise evidence regarding sports participation when designing products
- Develop and test products with the sport's stakeholders
- Offer a suite of products to meet the needs of targeted consumer segments

Elements: Sports should assess themselves against the driver, including their performance against the priority consideration set.

As a sport, do we...

Design Process

- co-design our products with key stakeholders, including the end-user?
- ensure products are universally designed?
- test our products with consumers through an iterative process?
- use cross-functional teams to work on the design of the product?
- access external expertise when required to assist with the development of new products?
- understand the target market for our products?
- conduct a gap analysis of our current products against consumer segments and demand?
- conduct a regular competitor analysis?

Features & Benefits

- provide options to consume at different times and on different days?
- adapt offerings to allow consumption in shorter periods of time?
- provide options to consume, which don't involve training commitments?
- provide options to participate which don't require an on-going inflexible commitment?
- provide opportunities to participate at times which align with the preferences of current and future participants?
- adapt our product offering to increase accessibility through non-traditional facilities?
- use technology to enable participants to seek information on, ask questions about, and register for our sport?
- provide product offerings that reduce the amount of equipment traditionally required to participate?
- design product offerings to limit the amount of equipment individual participants need to purchase?
- design products which specifically cater to participants from CALD, Indigenous and LGBTI backgrounds?
- provide opportunities for participants to play with their friends?
- provide non-competitive options for participants?

- utilise technology and social media to increase the engagement of participants?
- adapt our products to ensure the sport caters for each gender?
- provide offerings which cater for participants who play sport purely to get fit?
- refine our sport's offerings to address the major causes of injury?
- offer products for older Australians which caters to their abilities?
- consider providing consumers alternate forms of our sport through relationships with existing providers?

Example Performance Measures: driver-specific measures for sports' plans

- Overall number of participants to increase from X to Y by 2020
- Overall retention rates in participation to increase from X% to Y% by 2020
- Number of women's participants to increase from X to Y by 2020
- Number of women participating as a percentage of total participants to increase from X% to Y% by 2020
- Number of participants playing social formats of the sports to increase from X to Y by 2020
- Number of older Australians (+45) participating in the sport to increase from X to Y by 2020
- Number of junior participants (5-12) to increase from X to Y by 2020
- Number of youth participants (13-18) to increase from X to Y by 2020
- Number of participants in Sporting Schools program to increase from X to Y by 2020
- Number of CALD, indigenous and LGBTI participants to increase from X to Y by 2020
- Number of disabled participants to increase from X to Y by 2020

WORKFORCE



The means by which products are delivered to the market

The delivery and partnerships driver represents the coaches, volunteers and clubs within the sport, as well as alternative providers which can drive participation within the sport. The driver considers elements including volunteer strategies; mentoring opportunities for coaches; best-practice administration templates for clubs; and the consideration of private providers and facility operators as delivery agents for the sport.

A sport which optimises this driver will:

- Provide support and guidance to delivery partners, as well as an attractive value proposition
- Determine the appropriate partners to be delivering the sport's participation products
- Measure the performance of delivery partners to ensure they are meeting with required standards of the sport

Elements: Sports should assess themselves against the driver, including their performance against the priority consideration set.

As a sport, do we...

Coaches & Volunteers

- have a coach development plan in place to upskill coaches to deliver quality and safe programs?
- utilise available information to assist with deliverer and volunteer plans?
- have systems in place to assess the capability and capacity needs of the workforce?
- ensure the roles and responsibilities of all delivery partners clearly defined and documented?
- implement online programs offering non-accredited coaches the opportunity to receive relevant training?
- have a volunteer strategy which includes the acquisition and training of volunteer coaches?
- have in place mentoring opportunities for coaches?
- create initiatives to educate and engage with volunteers?
- consider ways for consumers to get involved in volunteering through 'micro-volunteering' opportunities?
- have specific programs in place to encourage and support diversity groups to deliver sport?

Clubs

- develop best-practice administrative templates for our clubs?
- provide training opportunities for club committees and boards?
- have any club programs in place which provide support for new participants?
- assist clubs with their volunteer recruitment and retention?
- assist clubs to identify participants with relevant skills to assist at club-level?
- educate clubs to adapt their environment to overcome barriers such as dress standards and unwelcoming behaviour?
- have initiatives in place to involve recent immigrants wanting to engage with a local sporting club as a volunteer?

Partners

- utilise Sport Australia resources to build our capability to deliver products in the school environment?
- consider engaging with private providers and facility operators to act as delivery agents?

- identify and highlight the value proposition for potential partners when seeking to form relationships?
- have systems in place to ensure quality, safety and consistency of delivery when using delivery agents?
- consider exploring the feasibility of franchising or licensing arrangements?
- have a formal process in place to assess the satisfaction of the experience delivered by third party deliverers?
- utilise internships to assist with the delivery of our products?

Example Performance Measures: driver-specific measures for sports' plans

- Number of consumers reporting overall satisfaction with their clubs to increase from X to Y% by 2020
- Number of consumers reporting overall satisfaction with their coaches to increase from X to Y% by 2020
- Proportion of registered consumers participating through alternative delivery partners to increase from X to Y% by 2020
- Number of coaches completing online training courses to increase from X to Y by 2020
- Number of coaches completing accreditation to increase from X to Y by 2020
- Coaches reporting overall satisfaction with the level of training they receive to increase from X to Y% by 2020
- Consumers reporting overall satisfaction with the delivery environment to increase from X to Y% by 2020
- Number of coaches involved in official mentoring programs to increase from X to Y by 2020
- Number of volunteers engaged with the sport to increase from X to Y by 2020
- Volunteers reporting overall satisfaction with the level of training and recognition they receive to increase from X to Y% by 2020
- Number of clubs attending club development workshops to increase from X to Y by 2020

INFRASTRUCTURE & EQUIPMENT



The provision of appropriate, accessible and affordable facilities and equipment

The facilities and equipment driver represents the quality, location, and utilisation of facilities; the equipment needed, provided and designed for consumers; and the government relations maintained with the sport. The driver considers elements including maintaining a facilities management plan; utilising non-traditional facilities; providing access to more affordable equipment; and actively maintaining relationships with all levels of government.

A sport which optimises this driver will:

- Maintain a facilities plan including analysis of supply and demand, as well as the consideration of different facility types
- Develop options for participants to have greater access to safe and affordable equipment
- Build cohesive and strategic relationships with relevant government departments

Elements: Sports should assess themselves against the driver, including their performance against the priority consideration set.

As a sport, do we...

Facilities

- Work with all levels of our sport to maintain an inclusive facilities management plan, covering all physical facilities required to participate in the sport?
- develop facility plans based on whole-of-life investment, covering: construction, acquisition, operation, maintenance, depreciation, upgrading, disposal, and replacement?
- maintain an ongoing facilities database recording the details of the age, type, condition, standard, capacity, utilisation, ownership, access rights, transport suitability, and suitability to under-represented groups?
- understand the supply and demand of facilities across geographic locations?
- utilise non-traditional facilities to increase options for participants?
- work with other sports to use multi-purpose facilities?
- design and adapt our offerings to increase accessibility for people of all abilities?
- consider renting out our facilities at times when they aren't being utilised?
- include facilities in our plans to grow participation in your sport?

Equipment

- provide opportunities to participate without needing to purchase equipment?
- provide access to more affordable equipment?
- work with the Australian Sports Foundation to access community support for equipment and facilities?
- consider technology-based opportunities to provide equipment sharing for consumers?
- include initiatives to access facilities and equipment funding in our plans?
- introduce safer equipment for junior participants?
- develop products to include the use of modified and varied equipment, facilities, and environment?

Government Relations

- actively maintain relationships with all levels of government?
- work with Local Government Associations to identify under-utilised assets at a local level?
- assess the economic and social impact of our sport?
- articulate how our sport contributes to community inclusion in order to access government support?

Example Performance Measures: driver-specific measures for sports' plans

- Number of utilised facilities to grow nationally from X to Y by 2020
- Facility utilisation to increase nationally from X to Y% by 2020
- Overall satisfaction with equipment provided in national junior programs to increase from X to Y% by 2020
- Facility funding received from all levels of government to increase nationally from \$X to \$Y by 2020
- Satisfaction with the affordability of the sport's equipment to increase from X to Y% by 2020
- Satisfaction with the distance to travel to play the sport to increase from X to Y% by 2020
- Satisfaction with the quality of the facility to increase from X to Y% by 2020
- Supply of facilities to meet demand in X% of regions by 2020

COMMERCIAL



The development of sustainable participation products and the commercialisation of related assets

The commercial model driver represents the sustainability of the products developed as well as the ability to maximise the commercial gains from the sport's assets. The driver considers elements including sizing the potential market size for new products; testing assumptions and analysing risks within product models; implementing a nationally-aligned brand; and conducting an audit of commercial assets across the sport.

A sport which optimises this driver will:

- Collect and utilise an evidence base regarding participation activities within the sport and the wider industry
- Apply evidence to establish sustainable participation products through strong value propositions for consumers and commercial partners
- Pursue a commercial return from all parts of the business, including nationally-aligned participation products and assets

Elements: Sports should assess themselves against the driver, including their performance against the priority consideration set.

As a sport, do we...

Product Sustainability

- analyse the propensity to pay of the consumer?
- assess the value the consumer places on our product?
- benchmark the price and value proposition of competing offers in the market?
- distinguish between fixed and variable costs in our products' financial models?
- understand the key drivers behind the commercial success of our products?
- perform a sensitivity analysis on our products' financial models to better understand risk?
- test the key assumptions within our products' financial models?
- price our products to generate a profit?
- size the potential market for our specific product offering?

Commercialising Assets

- conduct an audit and valuation of the commercial assets across the sport?
- conduct an audit of existing commercial agreements across the sport?
- develop an overarching commercial framework identifying whole-of-sport properties with exclusivity?
- have a nationally-aligned brand for our sports products?
- have shared financial outcomes across the layers of our sport?
- analyse the number and avidity of fans within our sport?
- analyse the number of participants who are fans of our sport?
- highlight our sport's unique attributes when talking to commercial partners?
- analyse which brands are spending on media and sponsorships within the industry?

- assess the satisfaction of the sports sponsors, and the main drivers of satisfaction/dissatisfaction?
- assess and communicate the value being delivered to commercial partners through their sponsorship with the sport?
- assess and communicate the sponsor cut-through being achieved through commercial partnerships?

Example Performance Measures: driver-specific measures for sports' plans

- Total surplus from our products to grow from \$X to \$Y by 2020
- Number of products generating a surplus to grow from X to Y by 2020
- Total value of our sponsorship assets to grow from \$X to \$Y by 2020
- Total commercial revenue to grow from \$X to \$Y by 2020
- Overall sponsor satisfaction to increase from X to Y% by 2020

MARKETING & COMMUNICATIONS



The messages and methods sports use to communicate internally and to consumers

The marketing and communications driver represents the messaging and brand of the sport, the channels for communication, and the overall planning of marketing and communications for both internal and external stakeholders. The driver considers elements including consistency of branding and commercial offerings throughout the sport; understanding channel frequency and preferences of consumer segments; and ensuring clear roles, responsibilities and protocols around communication within the sport, and to the end consumers.

A sport which optimises this driver will:

- Collect and utilise an evidence base regarding communication with specific participation markets
- Develop messages and materials about participation which are consistent with the organisation's purpose, values and brand
- Communicate messages and materials about participation, targeted to specific consumer segments, through relevant delivery channels

Elements: Sports should assess themselves against the driver, including their performance against the priority consideration set.

As a sport, do we...

Messaging & Brand

- use market insights to inform our marketing and communications planning?
- create product messaging that clearly expresses the value proposition of the product to specific targeted market segments?
- create product messaging that ensures our sport's unique attributes are promoted?
- tailor communications to potential all-abilities, indigenous, LGBTI and CALD participants to encourage their involvement in our sport?
- run targeted campaigns addressing specific barriers for the sport?
- ensure consistency in branding and commercial offerings across the sport?
- have brand integrity in the marketplace, with nationally agreed sub-brands for products?
- measure brand awareness, sentiment, and attributes of the sport and its major leagues?
- help consumers understand the holistic health benefits of sport and how our sport caters for their limitations?
- tell consumers we have offerings suitable for their health and fitness condition?
- use targeted promotional campaigns to overcome self-esteem barriers to sports participation?

Channels

- analyse the channel frequency and preferences of our consumer segments?
- promote our products to consumers through a variety of channels relevant to the consumer segment?
- regularly evaluate our communications to ensure they are successfully reaching and influencing target segments?
- utilise social media as a tool for instant feedback and two-way communication?
- review our internal skill set to ensure we have appropriate capabilities for utilising social media?
- use social media to open clubs to the community?
- design our website to ensure its appropriate for both current and potential participants?

Planning

- have a defined communications and content strategy, which leverages traditional and digital channels?
- develop our communication plans around key times and events?
- consider opportunities to market with industry partners to generate broader exposure for the sport?
- consider opportunities to market with other sports to generate broader exposure or host multi-sport events?
- ensure our social media presence is regularly monitored and updated in line with a tailored plan?
- ensure clear roles, responsibilities and protocols regarding communication within our organisation/sport?
- measure the effectiveness of our marketing and communications?
- utilise internships to assist with marketing and communications initiatives?

Example Performance Measures: driver-specific measures for sports' plans

- Brand awareness of the sport's product(s) increases from X to Y% by 2020
- Brand awareness of the sport's major league(s) increases from X to Y% by 2020
- Consumers' overall satisfaction with the sport's website increases from X to Y% by 2020
- Consumers' satisfaction with the website's ease of navigation increases from X to Y% by 2020
- Consumers' satisfaction with the website's content increases from X to Y% by 2020
- Consumers' satisfaction with level of direct communication from the sport to increase from X to Y% by 2020
- Consumers' satisfaction with the quality/content of direct communication from the sport to increase from X to Y% by 2020
- Consumers' engagement with the sport through social media to increase from X to Y by 2020
- Fan avidity of the sport increases from X to Y by 2020

APPENDIX 1

Social and Sport Trends

Share Economy

- Asset owners are more frequently using digital clearinghouses to capitalise on underutilised assets e.g. Parkhound; Uber; Airbnb
- Consumers are increasingly renting from their peers rather than renting or buying from a company e.g. Uber, Air BNB
- Consumers are generally becoming less wedded to the ownership of consumer goods, and are more comfortable renting or sharing them



Virtual is Reality

- Consumers are increasingly moving online to connect, deliver and access services, obtain information, perform transactions, and work
- Sharing more online with their social network
- Digital media is being used to selectively access information through multiple channels
- In the experimental phase of wearable technology with increasing uptake
- Organisations who want to reach millennials will need to invest in mobile



Experiences & Personalisation

- A rising demand for experiences over products - led by millennials - increasing expenditure on concerts, events, festivals e.g. Color Run, Tough Mudder
- An expectation of personalised services to meet individual unique needs and wants whilst being delivered en masse
- The current demand for personalised fitness solutions is in line with the broader consumer trend



Convenience is King

- Convenience a key trend across most industries
- Consumers' increasing expectations of instant gratification
- On-demand TV - when, where and for how long - e.g. Netflix
- Speed and accessibility an essential factor to reach consumers - millennials especially have experienced almost anything a click away
- Top-end restaurant-quality food now being delivered to consumers' front door



Lifestyle & Community

- Brands are focussing on creating a lifestyle - not just promoting product features alone
- Consumers attracted to an authentic community-driven brand.
- Consumers want to be a part of something - a product that defines them, or understands them
- Examples: Apple, CrossFit, F45, Parkrun



Holistic Health

- Consumers seeking out healthier lifestyles, with a holistic attitude toward optimal physical and mental health - 'healthy the new rich'
- Growing focus on mental health e.g. mindfulness apps; adult colouring books
- Consumers measuring various health elements - sleep, diet, exercise, weight
- Food and beverage industry shifting e.g. Coca-Cola altering their product mix
- Baby Boomers are ageing with a greater emphasis on youth and vitality than previous older generations



New Technologies

- New technologies are a major influence on spectators, participants, and home-viewers
- Spectators: wi-fi, media streaming; food ordering; stadium apps, tickets statistics - eliminate at-home PODs
- Participants: online registration, fixtures, communities; 'gamification' e.g. Zwift, Strava;
- Home-viewer: digital; user-generated content, match analysis, fan stories



eSports

- Approximately one-fifth of the world now actively plays video games for an average of an hour a day
- eSports is booming in playing, watching and attending
- In 2014, 205 million global viewers and \$194 million in industry revenue
- Gambling on eSports is estimated to be \$US8m worldwide
- Professional sports clubs now signing leading eSports players



Adapted Offerings

- Sport offerings are being adapted or are being overtaken
- New products created and/or promoted to meet new consumer needs e.g. Colour Run, Tough Mudder; Parkrun; T20; AFL 9s, Viva 7s, Futsal, Fast 5
- Sports will need to specifically cater for a large baby boomer segment
- Sports will be challenged with capturing the interest and involvement of diverse cultures as Australia becomes increasingly multi-cultural



Sport to Get Fit

- Consumers increasingly playing sport to get fit, not getting fit to play sport
- Participation rates in running, walking, and gyms activity all risen over the past decade; whilst participation rates for many organised sports are stagnating or declining
- Sport is now widely recognised as an effective means of reducing the rising rates of obesity and chronic illness.
- Sports products will increasingly be designed to ensure a 'workout'



Women in Sport

- A growing sector-wide focus on increasing female attendees, viewers, participants
- The gap has narrowed between men's and women's interest in sport
- Female sport celebrities are closing the gap on male counterparts and there is growth in corporate demand for female ambassadors
- Women are being empowered to participate in sport through recent campaigns e.g. 'This Girl Can'



Sport to Fit Schedules

- Adults are experiencing greater time fragmentation
- Consumers less able and willing to commit to fixed times to play sport
- Taking advantage of ad-hoc opportunities to play, watch or volunteer
- Individualised sport and fitness products are preferred – e.g. opting to go for a run when the opportunity arises
- The rise of dual-income families has reduced leisure time and increased transport barriers for children



The Rise of Asia

- Population and income growth throughout Asia is creating tougher competition and new opportunities for Australia
- Asian countries are investing heavily in sports capabilities and, have rapidly improved gold medal outcomes at the Olympics
- As disposable incomes grow, the populations of Asian countries are becoming more interested in sport
- New markets are being created for sports television, sports tourism, sports equipment, sport services and sports events



Less Time More Options

- Consumers are spending less time on recreation, combined with lower proportion of recreation time on sport (and more on screen-time)
- Growth in extreme, lifestyle, adventure and alternative sports
- Increasingly seeing the international expansion of leading sports for commercial opportunities e.g. MLB, NFL, NBA, International Champions Cup
- A rise in the private commercialisation of sport – community sports replaced by more nimble and commercially astute private providers



GLOSSARY OF TERMS

Barrier	A negative outcome identified by the sector at an organisational-level or consumer-level
Consumer	A participant or fan of the sport
Market Insights	Information about the consumer and the broader market, gained through market research or analysis of available data
Deliverer	An organisation or individual providing opportunities for consumers to participate in a sport product
Driver	A cause of one of the major outcomes (positive and negative) identified by the sector at an organisation or consumer level
Elements	A priority consideration set for sports when assessing performance and developing their internal plans
Outcomes	Positive or negative experiences at an organisation-level or consumer-level. Effectively implemented drivers result in positive outcomes. Ineffectively implemented drivers result in negative outcomes.
Participation Framework	The complete guide to driving sustainable participation growth in the current environment
Performance Measures	An indication of performance which specifies a desired, quantifiable change within a timeframe
Product	A program for sport participants
Product Design	The features and benefits developed for the product
Trend	A general direction in which something is changing or developing





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