

SWIMAUS™

REFINING THE PARTICIPATION PATHWAY

arena 

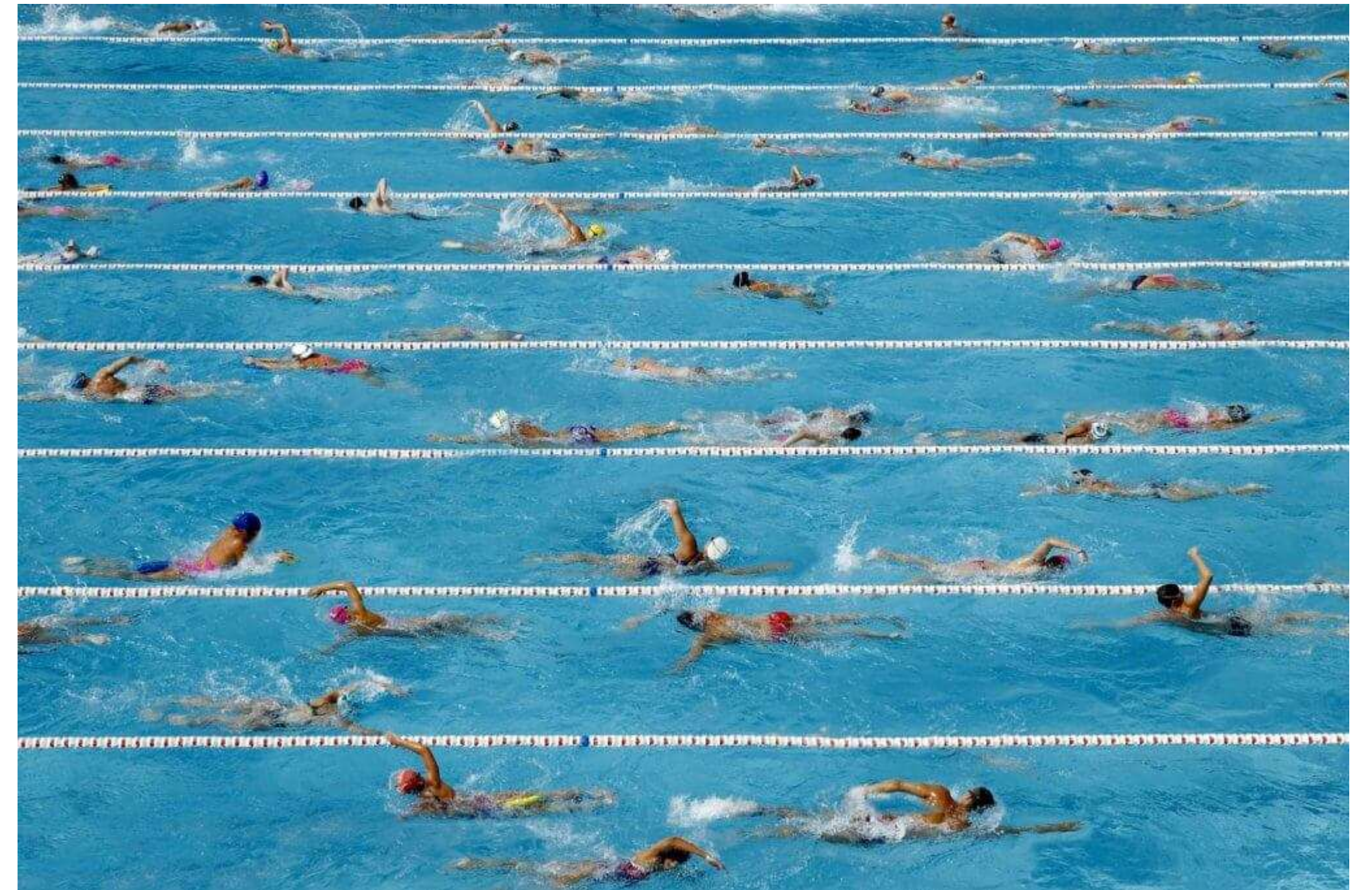
SPORTAUS

© CITY FERTILITY

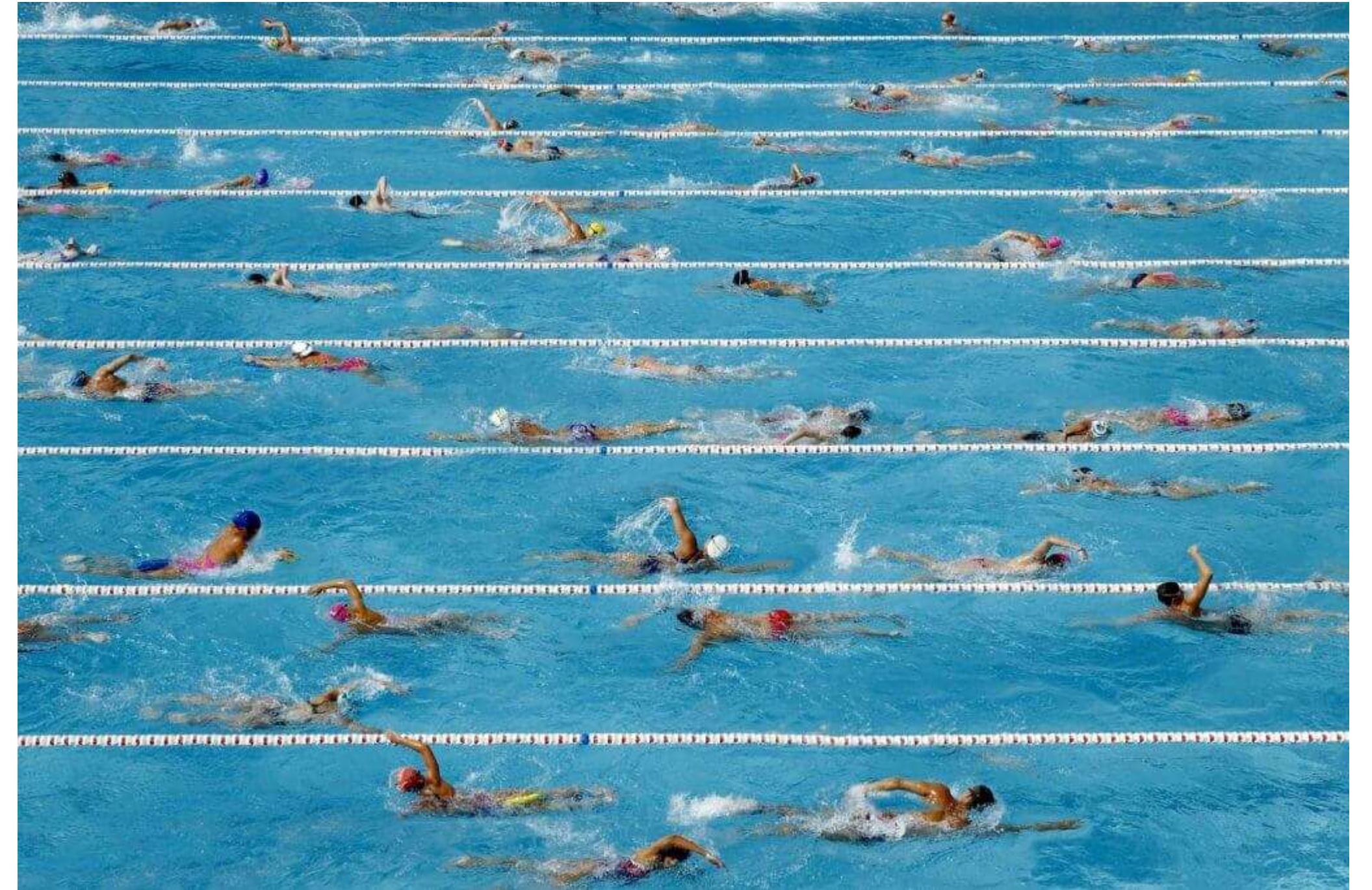
OVERVIEW

- Framing participation
- What does swimming look like right now?
- Megatrends
- Taking advantage – Participant Experience

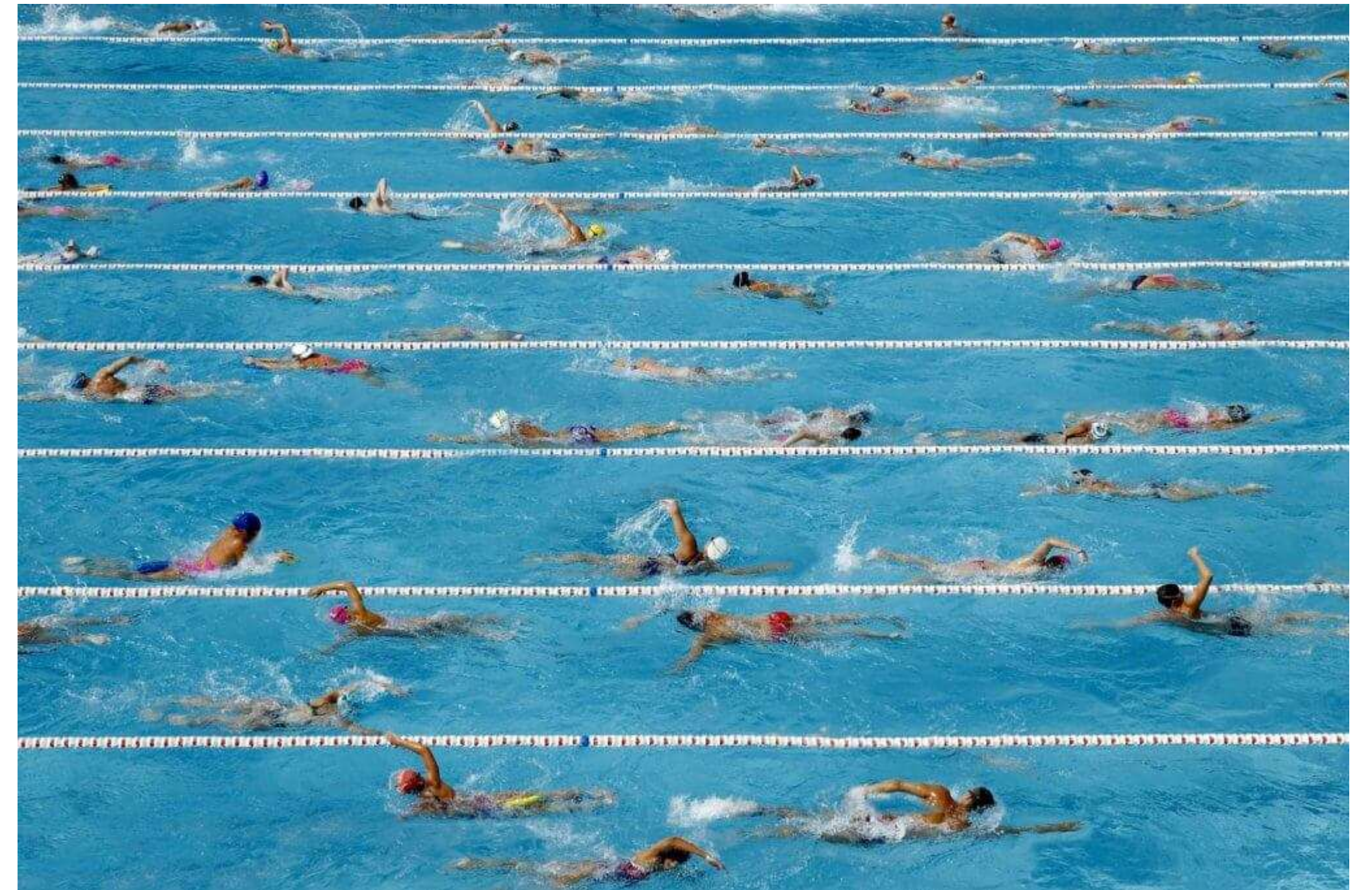
**STAY STANDING IF
YOU'RE A SWIMMER!**



**STAY STANDING IF
YOU'RE A SWIMMER
AND YOU'VE NEVER LEFT!**



**STAY STANDING IF
YOU'RE A SWIMMER
AND YOU LEFT BUT
YOU CAME BACK**



**STAY STANDING IF
YOU WERE A SWIMMER
BUT YOU'RE NOT ANYMORE**



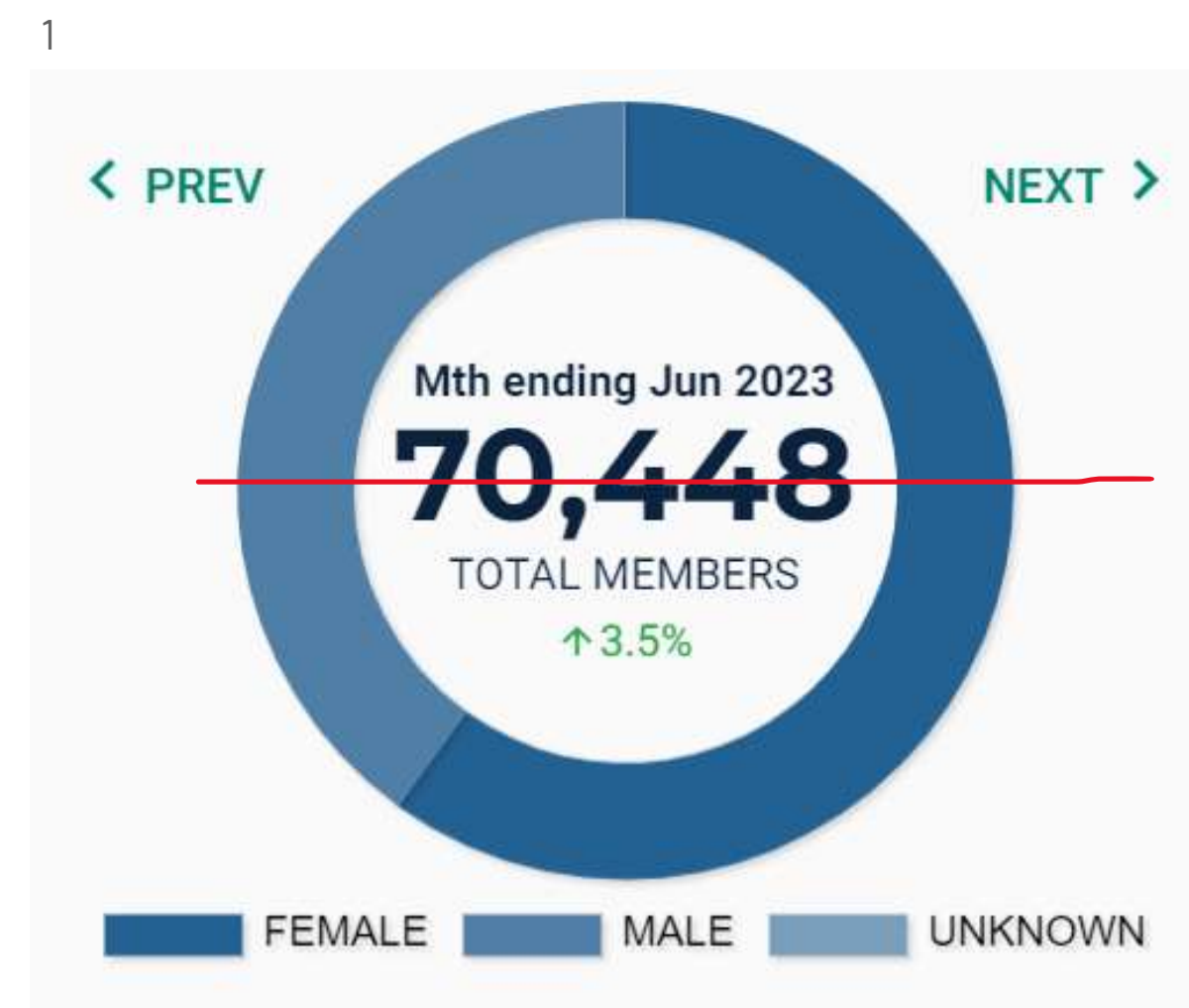
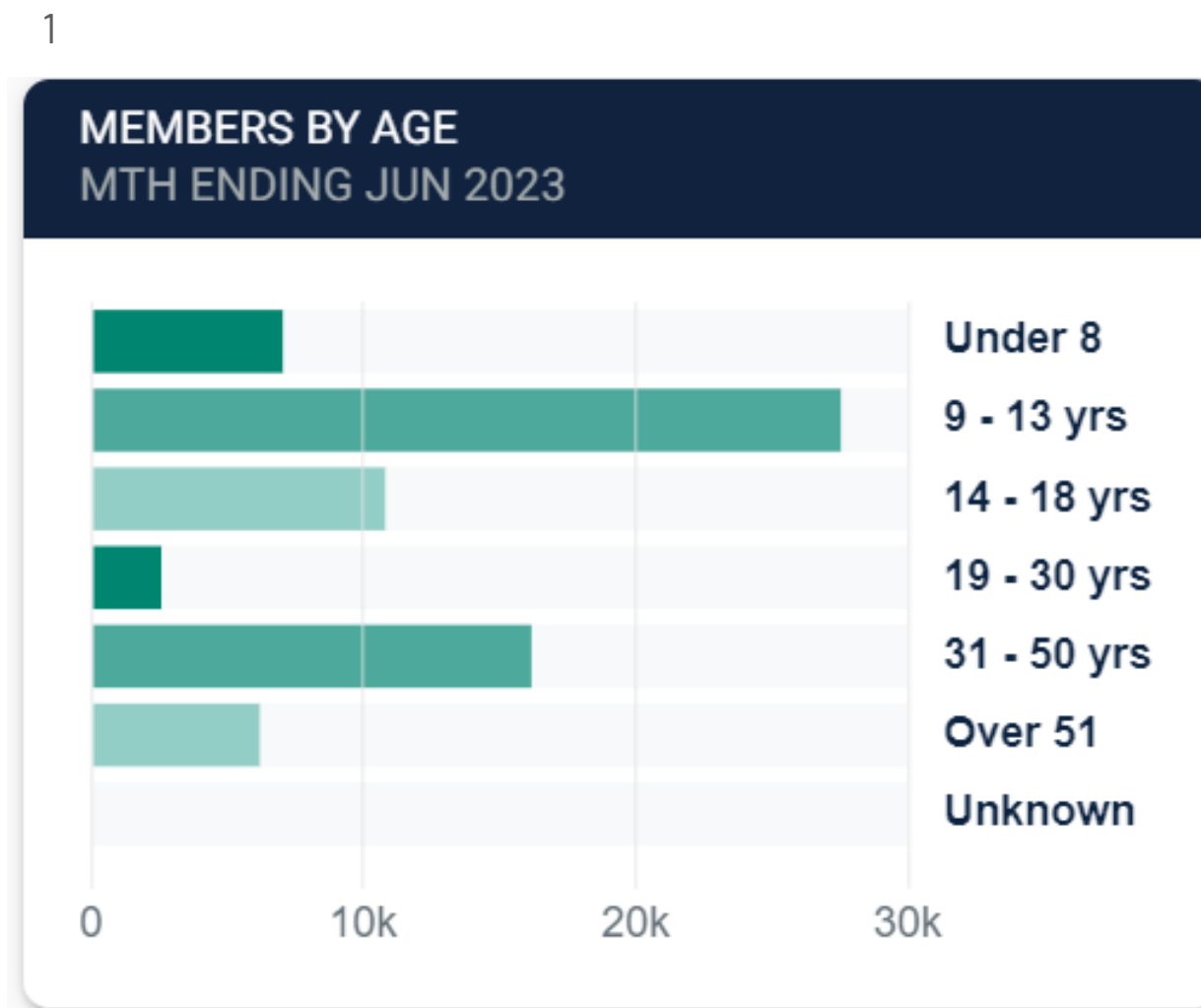
**STAY STANDING IF
YOU LEFT SWIMMING
BETWEEN 13 AND 17**



FRAMING PARTICIPATION

- Unconscious service providers; Education & Access to competition
- Serve members but largely club/coach directed experiences
- Shifting towards higher expectations for \$

SWIMMING BY THE NUMBERS



Sport ²





















🏃 **Running/athletics** is the most popular sport-related activity for males [15+].

🏊 **Swimming** is the most popular for females [15+] and boys and girls [0-14].

1. Swim Central Reporting, *Swimming Australia* [accessed 3 October 2023]
2. AusPlay Data Portal, *Australia Sports Commission*, [accessed 20 July 2023]

SWIMMING BY THE NUMBERS

Most popular sport-related activities with estimated participants

Girls aged 0-14	Young Adult aged 15-24	Adult aged 25-54	Mature Adult aged 55+
<div> Swimming - 942,000</div>	<div> Running/Athletics - 320,000</div>	<div> Running/Athletics - 1,138,000</div>	<div> Swimming - 660,000</div>
<div> Gymnastics - 415,000</div>	<div> Netball - 291,000</div>	<div> Swimming - 1,135,000</div>	<div> Cycling - 335,000</div>
<div> Netball - 293,000</div>	<div> Swimming - 271,000</div>	<div> Cycling - 668,000</div>	<div> Running/Athletics - 186,000</div>
<div> Football/Soccer - 237,000</div>	<div> Basketball - 153,000</div>	<div> Netball - 322,000</div>	<div> Golf - 177,000</div>
<div> Basketball - 154,000</div>	<div> Football/Soccer - 151,000</div>	<div> Tennis - 285,000</div>	<div> Tennis - 159,000</div>
<div>See more</div>	<div>See more</div>	<div>See more</div>	<div>See more</div>

Females

Most popular sport-related activities with estimated participants

Boys aged 0-14	Young Adult aged 15-24	Adult aged 25-54	Mature Adult aged 55+
<div> Swimming - 868,000</div>	<div> Running/Athletics - 429,000</div>	<div> Running/Athletics - 1,440,000</div>	<div> Cycling - 623,000</div>
<div> Football/Soccer - 511,000</div>	<div> Basketball - 367,000</div>	<div> Cycling - 1,052,000</div>	<div> Swimming - 524,000</div>
<div> Australian Football - 342,000</div>	<div> Football/Soccer - 362,000</div>	<div> Swimming - 918,000</div>	<div> Golf - 523,000</div>
<div> Basketball - 325,000</div>	<div> Swimming - 220,000</div>	<div> Football/Soccer - 593,000</div>	<div> Running/Athletics - 249,000</div>
<div> Cricket - 195,000</div>	<div> Australian Football - 189,000</div>	<div> Golf - 476,000</div>	<div> Tennis - 187,000</div>
<div>See more</div>	<div>See more</div>	<div>See more</div>	<div>See more</div>

Males

1. [AusPlay Data Portal: Participation by activity](#), Australian Sports Commission, (accessed 1 May 2023)

REASONS FOR NON-PARTICIPATION

- Excessive Travel
- \$ of training and competition – Money, Time, Opportunity cost
- Training time (inconvenient)
- Perception of competence – Physical Literacy
- Environment that is too competitive
- Also emerging that early specialisation leads to lower long term participation rates

SWIMMING BY THE NUMBERS

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Swimming Report 

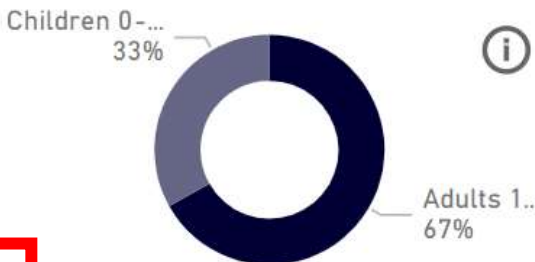


Market Outlook & Opportunity

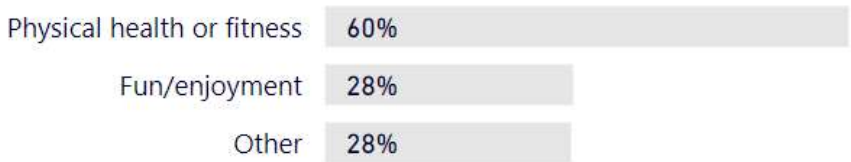
4,939,576 Participants

1,483,841 Considering to participate in this activity

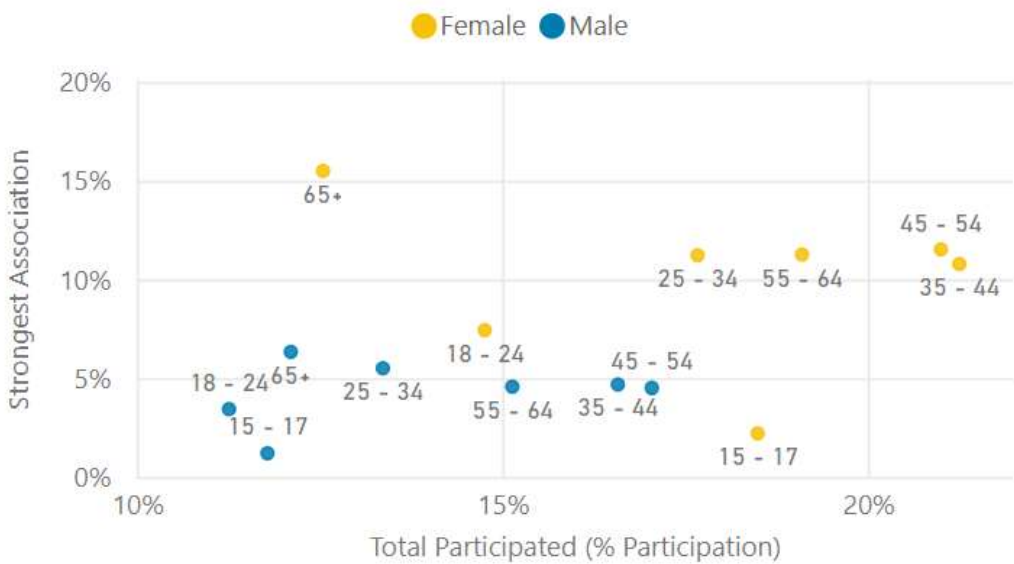
318,119 At risk of dropping out or having already dropped out



Top Reasons for Consideration

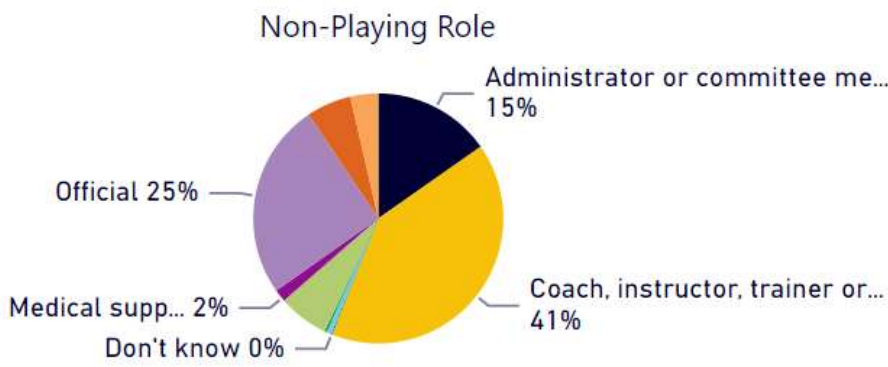


Participation & Association by Gender and Age



1,273,683 Nominated this activity as the sport or physical activity they most strongly associate with

117,274 Involved in a non-playing role



1. [AusPlay Data Portal: Participation by activity](#), Australian Sports Commission, (accessed 1 May 2023)

REASONS SUPPORTING PARTICIPATION

- Parental & Family support
- Peer Interaction – social environment
- Positive environment – Fun
- Accessible Venues



SWIMMING BY THE NUMBERS

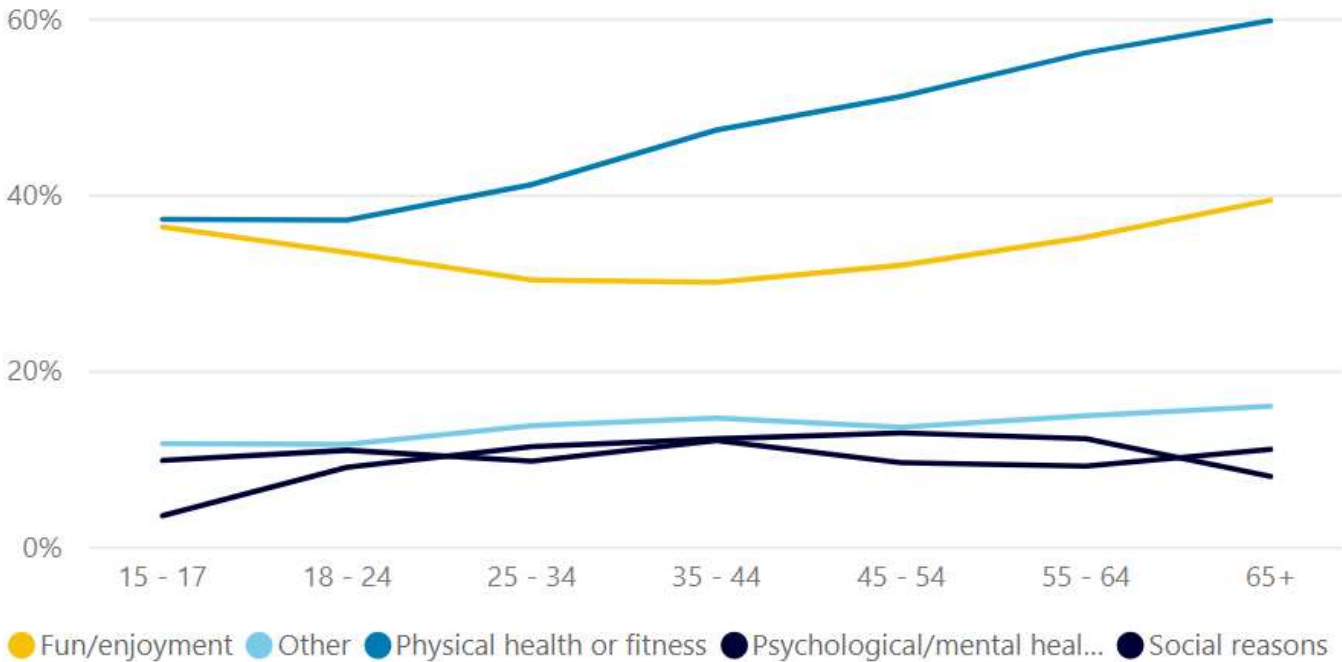
AUSPLAY™

Swimming Report 



Motivations & Reasons for Drop Out (Adults 15+)

The chart below shows the motivations to participate in Swimming, with more dominant motivations in larger font.



The chart below shows the reason for dropping out, with more dominant reasons in larger font. Responses are multiple response, meaning more than one reason can be given.



Identifying reasons for dropping out can play a role in identifying opportunities for innovations in product portfolio or alternate sport formats.

This chart provides a snapshot of the adult 15+ population by age in terms of motivations to participation. When designing strategies, products or messaging to engage with specific demographic groups, these should be built around the core motivations of that audience.

1. [AusPlay Data Portal: Participation by activity](#), Australian Sports Commission, (accessed 1 May 2023)

RECAP

- Swimming is a sport a lot of Australians love
- Competitive swimming is served well
- People's expectations on sport is changing
- The potential market for swimming has huge upside
- Don't be beaten by what you know

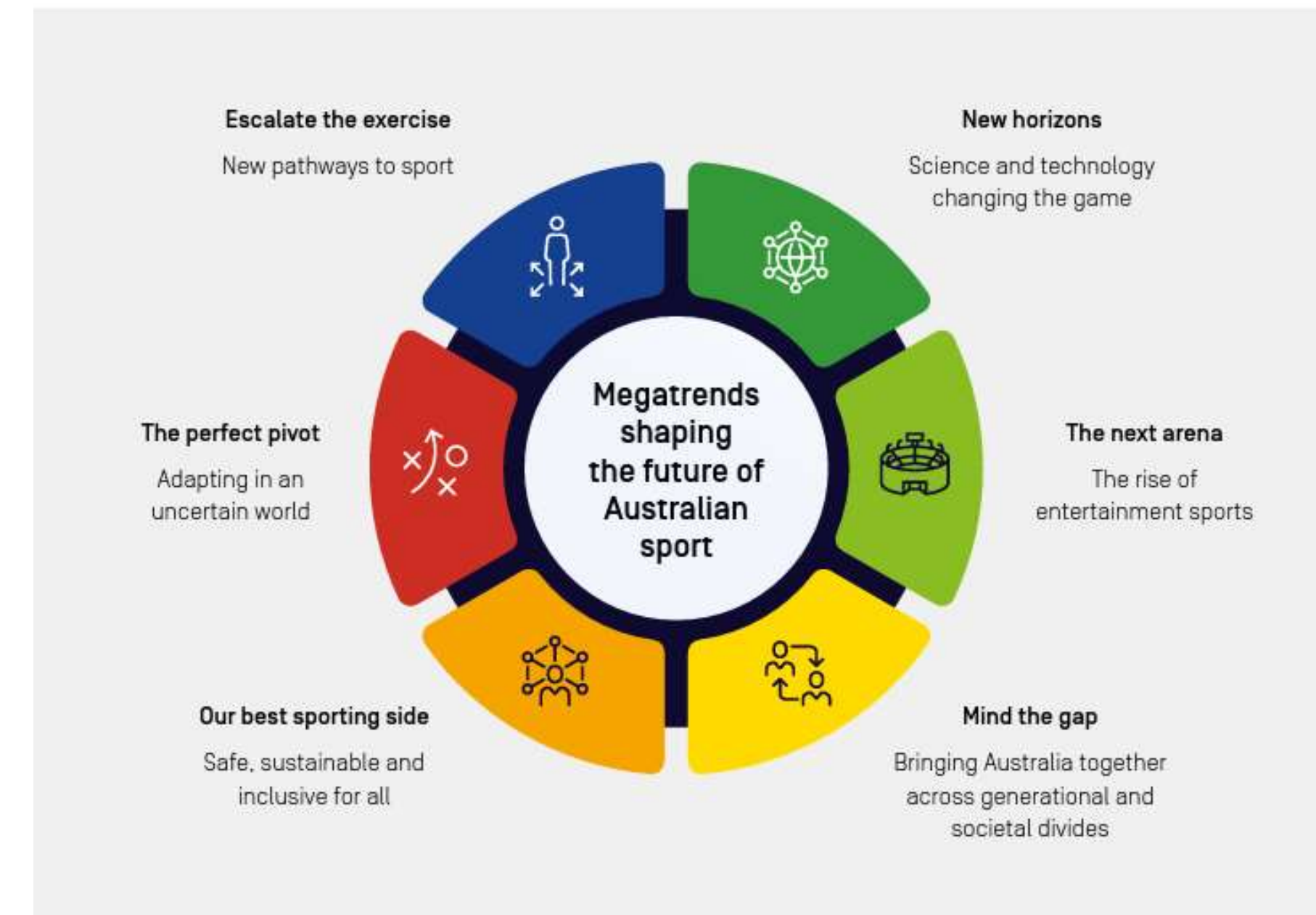


BUT WE DON'T HAVE SPACE!



SPORT MEGATRENDS

- **Escalate the exercise** – increased participation in non-organised sport, fitness-based activities provide new opportunities to grow and develop participation
- **Mind the gap** – Sport organisations to champion positive change in society because of their values-based focus on fair play, inclusivity and teamwork.
- **Our best sporting side** – positive changes in societal issues to drive changes in community sport clubs, more emphasis on positive participant experiences. Sport will better reflect the Australian community (1/3 of all Aussies in 2022 were born overseas)



[The Future of Australian Sport](#)

TAKE ADVANTAGE

MEETING PEOPLE WHERE THEY ARE

- Meeting people where they are
- Developing products that suit the climate
not trying to control the weather
- Experience and quality is everything
- Be niche so you can be excellent



TAKE ADVANTAGE

MEETING PEOPLE WHERE THEY ARE



TAKE ADVANTAGE

MEETING PEOPLE WHERE THEY ARE

- Focused on Women and highlights elements that we know are attractive to women in sport
- About the self, a moment of space for them, fun, confidence building, there is someone with experience/a qualification, personalised, low pressure
- Experience of the ocean in a non-threatening, non-competitive way



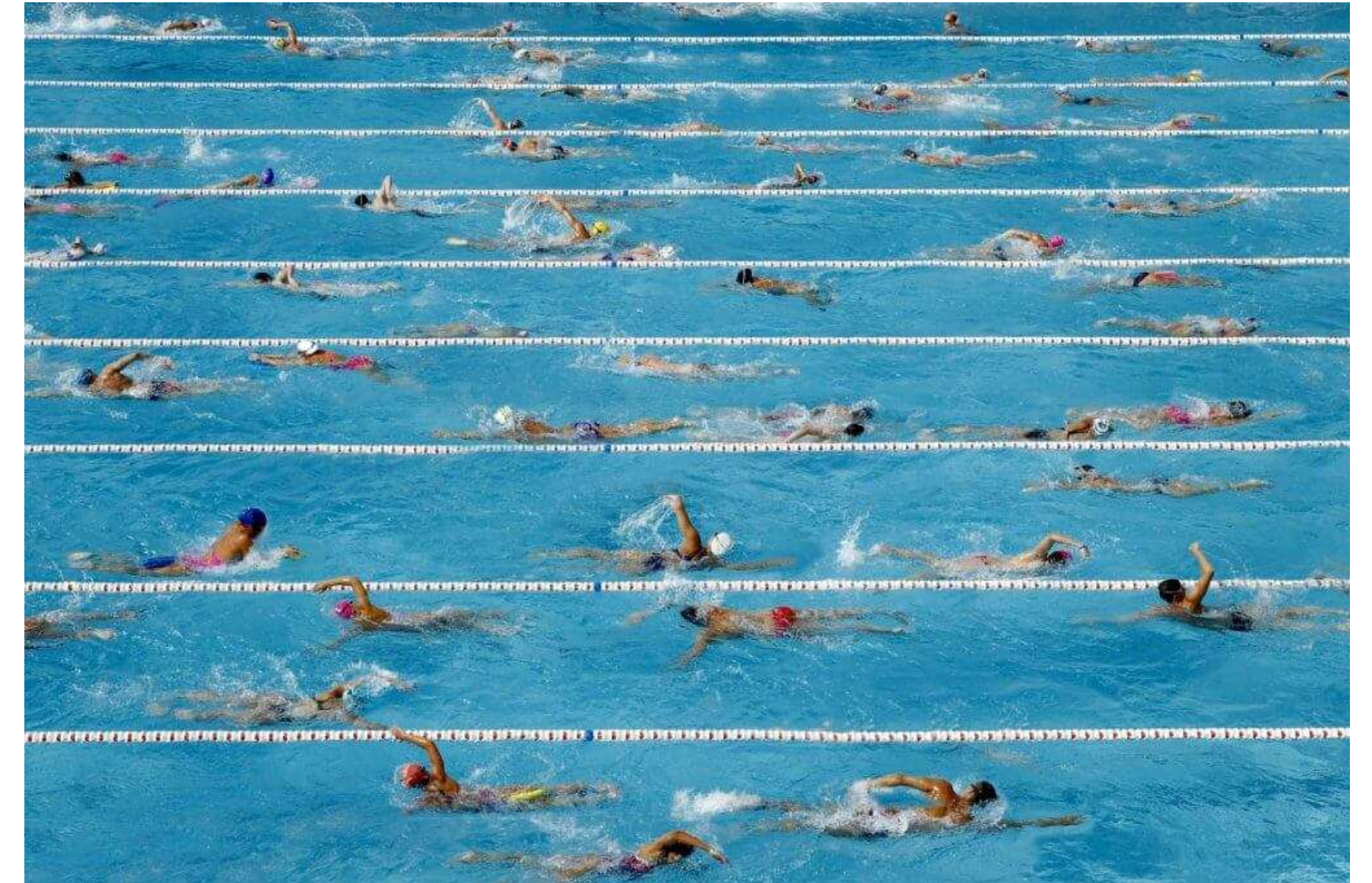
HOW?

- What gaps are there?
- What does this look like if it was focused on <INSERT>?
- How could this look different?
- If X organisation how would they do it?
- If we had \$100,000,000 what would we do differently?
- What could I do with \$100,000, \$10,000, \$1,000, \$0



OPPORTUNITIES WITH NO SPACE

- Quality experiences – Fun, social, smiles
- Additional value for your members out of the water
- Bridging/transition programs for athletes, help them earn a wage, give back or support the club
- Attractive for parents – social + racing
- Go to the ocean
- Test quick and fail fast



OPPORTUNITIES WITH SPACE

- Swimming for Mental Health
- Integrating with Open Water Swimming
- Non-Competitive training
- Fun & Enjoyment first
- Investigate and ask people who don't swim, why



RESOURCES

- [Clearinghouse of Sport](#)
- Australian Sports Commission Participation;
[Design Toolkit](#), [Participation Planning](#)
- [Megatrends](#)
- Sport West Resources
- Government demographic data
- [IDEO](#) & [IDEO U](#)

Questions

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