



Australian Government
Australian Sports Commission



AIS

Future Planning in the Sport Sector

Reimagining sport participation



Shaping our Planning

Trends in Sport Participation



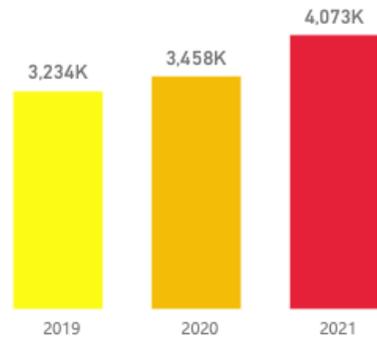


How Australians' participation is adapting to COVID-normal

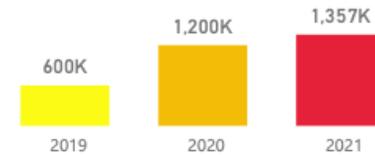
Use of wearable and other exercise technology is also increasing

While the pandemic may not have initiated the increasing use of other technologies, it has certainly accelerated the trend.

Wearable technology



Watching/accompanying video sessions of physical activities/fitness/exercise



Women are more likely than men to be using both of these types of exercise technology.



How Australians' participation is adapting to COVID-normal

The social and mental health benefits of exercise are more important than ever

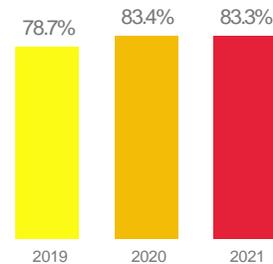
Most participants in sport and physical activity are still motivated by physical health/fitness or fun/enjoyment but the importance of social (such as meeting up with friends) and mental health benefits continue to grow.

In 2021 women were more motivated by mental health benefits (36%) than men (24%).

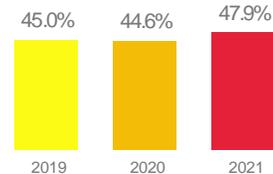
Main Motivations - Participants 15+



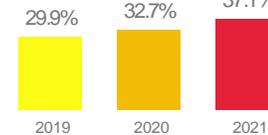
Physical health or fitness



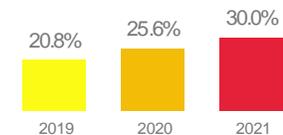
Fun/enjoyment



Social reasons



Psychological/mental health/therapy

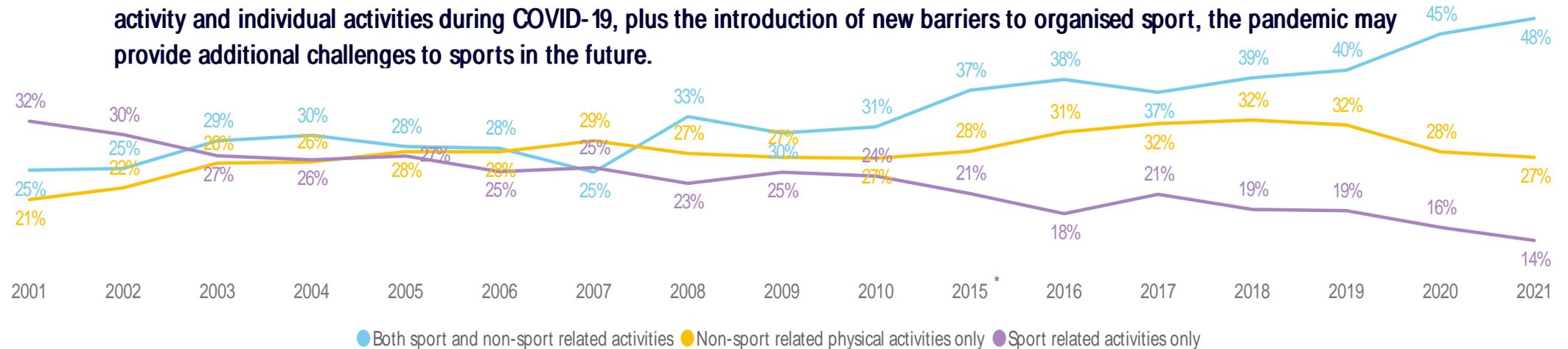




The impact of COVID-19 on participation trends

The rise of physical activity over sport

In the early 2000s the Exercise, Recreation and Sport Survey (ERASS) reported that sport-related activities were more popular than non-sports (physical activities). Then, as lifestyles and circumstances changed over the years the situation reversed. This trend towards a preference for non-sport-related activities (as well as a shift from organised sports to individual sport activities such as running, swimming or cycling) has since continued. And now, with the more accessible nature of physical activity and individual activities during COVID-19, plus the introduction of new barriers to organised sport, the pandemic may provide additional challenges to sports in the future.



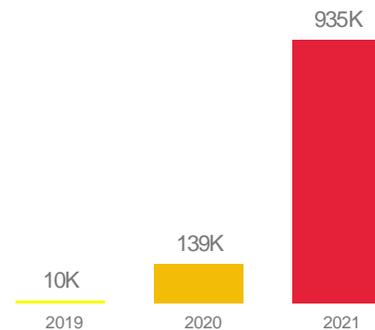


How Australians' participation is adapting to COVID-normal

Virtual based physical activity becomes a top 20 activity

The most popular way to use technology was through motion sensing/activity-based video games such as Wii Fit, Xbox, PlayStation (893,000 participants). The use of indoor smart trainers/treadmills (260,000) or online platforms such as Zwift or Rouvy (170,000) was lower but still growing.

Estimated Number of Participants 15+ in
Virtual Based Physical Activity



Who's participating in virtual based physical activity?

Those participating are more likely to be:

- Under the age of 35
- Living in families with children
- Living in the ACT, Tasmania, NSW and Victoria



What does the future look like for sport in the community?

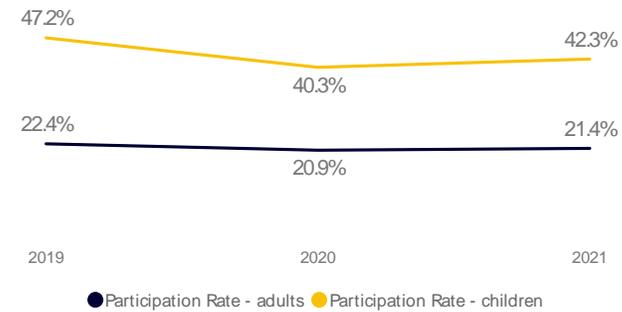
There is growing evidence that the new participation 'normal' includes a greater mix of organised sport and the types of activities that can be done in a physically-distanced way.

Australians are not abandoning club sport - there are indications players are returning - and clubs will continue to play an important part in the mix of activities.

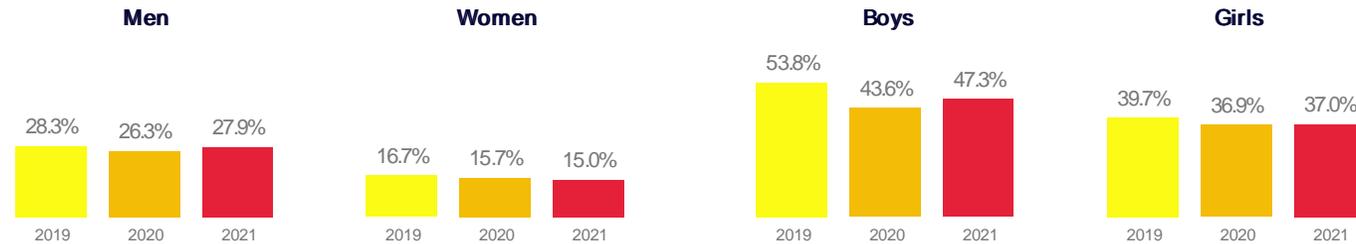
Men and boys are currently driving the return to clubs

Men have traditionally been more likely to participate through sports clubs than women. It is not surprising, therefore, that both the decline in 2020 and the beginnings of a rebound in 2021 have been driven by men and boys.

Participation through Sports Clubs/ Associations



Participation through Sports Clubs/ Association by Gender





Emerging Trends

Volunteers

Concerns the potential for volunteer to not return to sport once restrictions are lifted, “only 53% of adults who volunteered in sport before COVID-19 were back volunteering by March 2021

Ageing volunteer trends across all sports

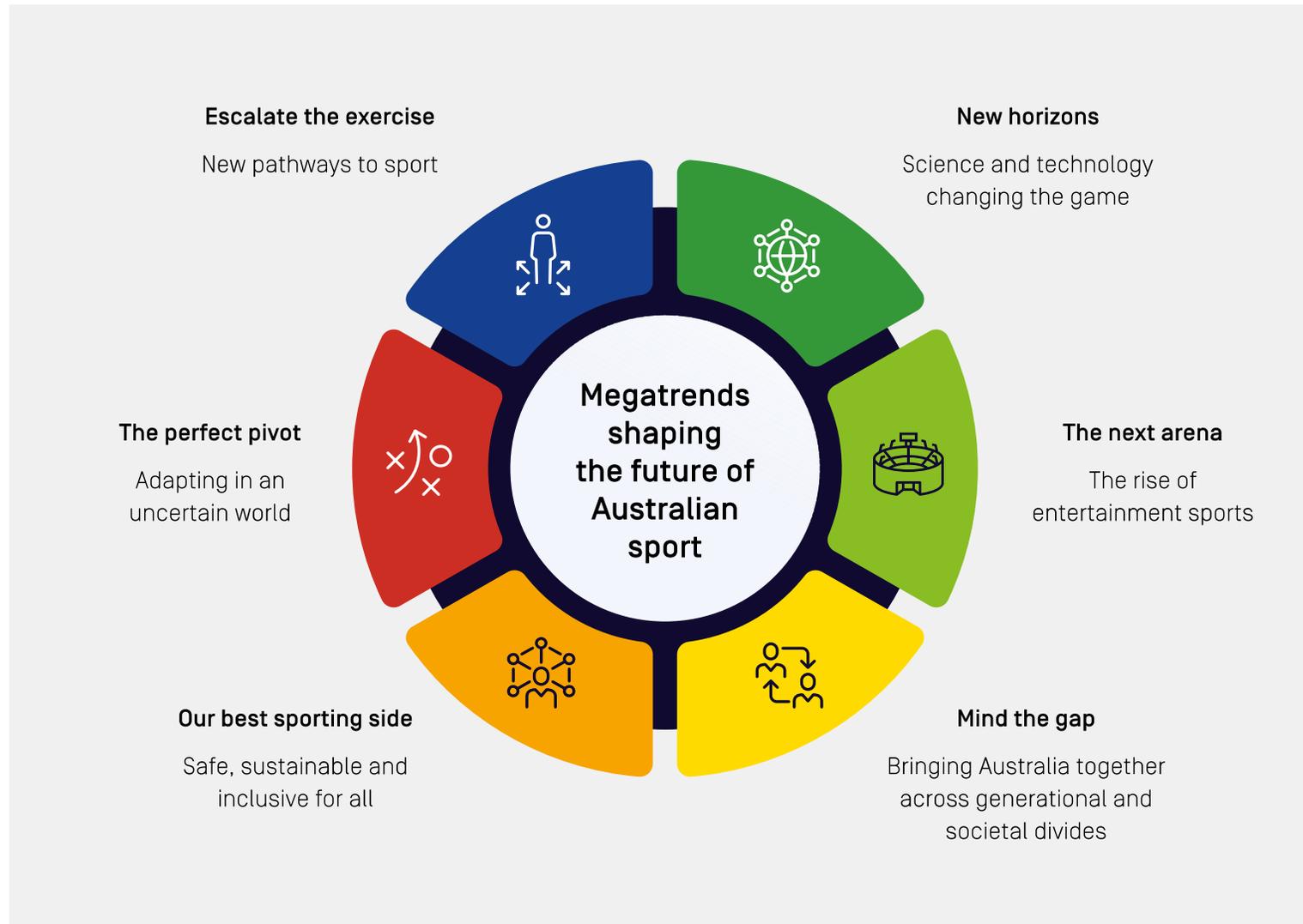
Technology

39% of Australians used digital platforms to exercise during the national lockdown of 2020

This trend is projected to increase as Australians invest in wearable fitness tech, at-home fitness equipment and fitness apps

Sports will need to consider offering participation products and communication methods that meet the contemporary demands and lifestyle choices of many Australians

Megatrends 2022



CSIRO Megatrends – Escalate the Exercise



Opportunities for sport:

- Develop new and innovative ways to bring sport to more Australians
- Provide more inclusive and inviting sporting experiences for all abilities
- Actively promote the benefits of sport for individuals and communities
- Utilise new technologies to increase participant convenience

CSIRO Megatrends – New Horizons



Opportunities for sport:

- Invest in female athlete-specific research and support services
- Partner with adjacent sectors and industries to drive innovation
- Invest in new and emerging technologies to optimise sports performance
- Establish strong governance standards for the ethical use of athlete data

Emerging ethical issues in high-performance sports science

Data privacy and ownership rights, transhumanism, genetic testing and cutting-edge performance innovation

CSIRO Megatrends – The Next Arena



Opportunities for sport:

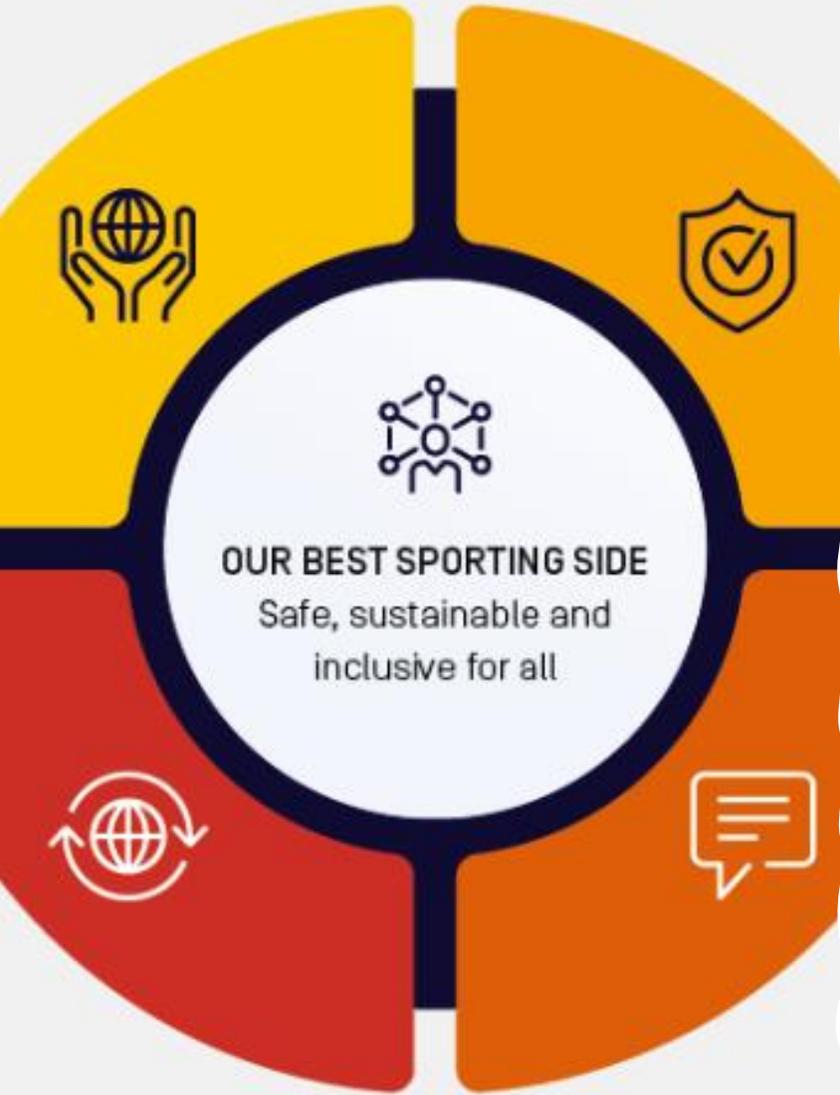
- Engage a new generation of consumers and fans through digital media
- Partner and invest in digital capabilities to drive innovation and reach
- Develop immersive experiences through AR and VR technologies
- Integrate data and digital systems to offer a seamless user experience

CSIRO Megatrends – Mind the Gap



Opportunities for sport:

- Cater for the cultural and religious diversity of sports participants
- Broaden and develop sporting pathways for people of all abilities
- Increase participation opportunities for First Nations people in sport
- Understand what the next generations of Australians want from sport



CSIRO Megatrends – Our Best Sporting Side

Opportunities for sports:

- Play a community leadership role promoting inclusion
- Ensure member protection policies and reporting structures are strong
- Provide greater license for athletes to express their personal views
- Invest in partnerships to drive sustainability at all levels of sport

CSIRO Megatrends The Perfect Pivot



Opportunities for sports:

- Invest in the capability uplift of both volunteer and paid workforce
- Build greater resilience in forward planning, logistics and infrastructure
- Partner with local business communities to build capability and capacity
- Use the power of sport to strengthen relations locally and internationally

Emerging Trends – Final Comments

- Sports sector was not prepared for a national crisis
- COVID-19 revealed much of what the sector relied upon from a format, structural and community base delivery model reliant heavily on volunteers was not future proof
- If Australian sport is to become stronger and more resilient, it needs to adopt a more flexible and agile model that is responsive to and meets contemporary demands
- Sports should consider the value of social, flexible and consumer-centred products for participants and volunteers



Shaping our Planning

Future Planning for Sport Participation

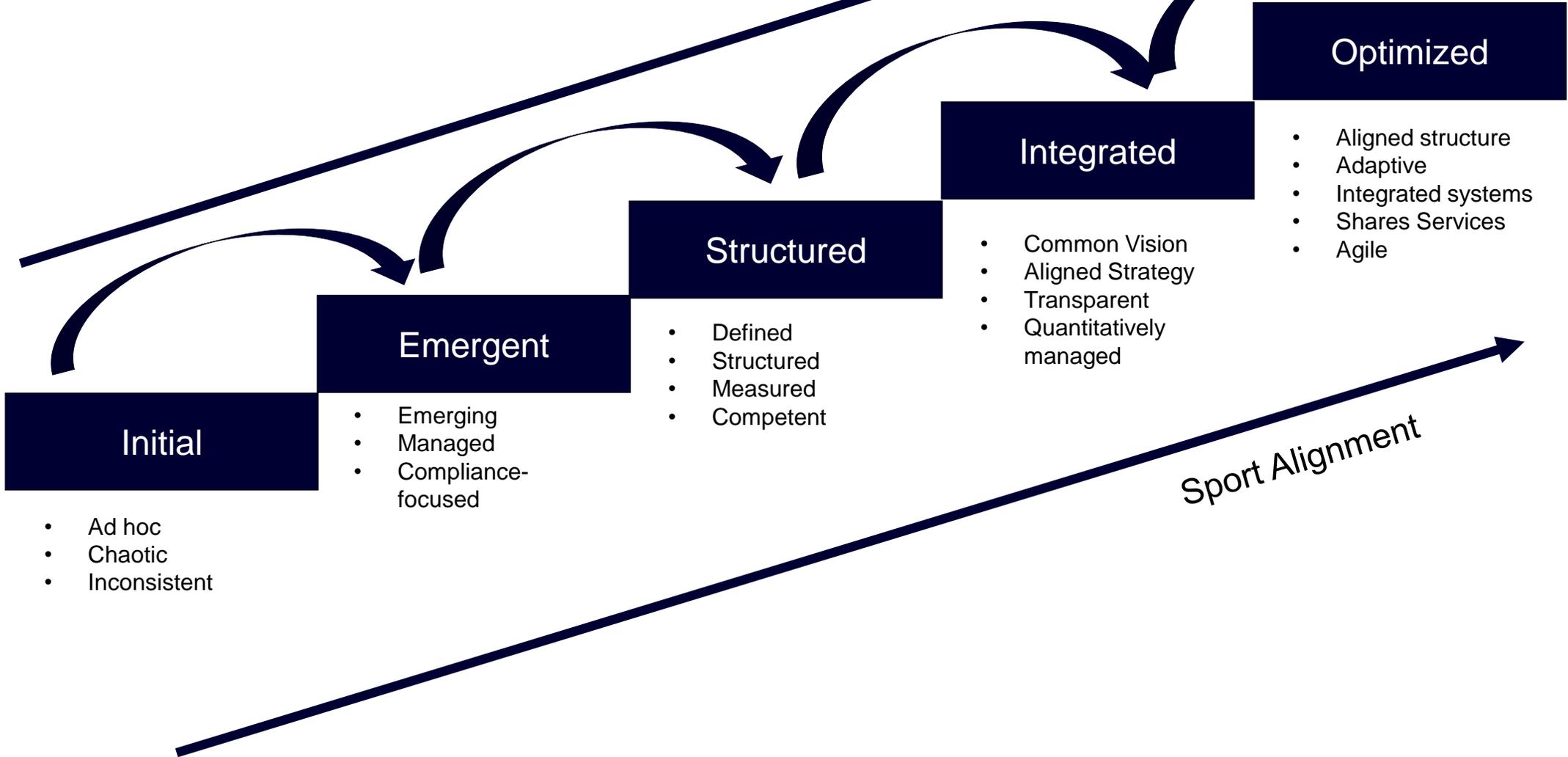




Sport Optimisation

Governance Maturity

Sport Alignment



Top 10 Questions to shape Strategic Thinking

1. What are some of things you think sport is doing well?
2. What are the most significant risks facing sport in the next decade?
3. What does the future sport participant look like?
4. Who do you see as your competitors in a highly congested sporting landscape?
 - *What are your competitors doing that we should or could?*
5. How did COVID impact sport?
 - *Think about what lessons we learned from COVID.*
6. What could hold sport back from achieving success in the future?
7. What emerging trends could sport adopt or benefit from? I.e. Technology, sustainability, social responsibility.
8. What does sport need to consider to achieve sustainable long term success.
9. Who would be your future commercial/delivery partners?
10. What is sport's point of difference in 2032?



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AIS

Louisa Begley

Louisa.Begley@ausport.gov.au

Sport Governance and Organisational Enhancement Team

ausport.gov.au



Leverrier Street Bruce ACT 2617
PO Box 176 Belconnen ACT 2616
+61 2 6214 1111