

SPORT NEW ZEALAND

SPORTS PARTICIPATION AND DIGITAL MEDIA INSIGHTS REPORT

OCTOBER, 2015



SPORT NEW ZEALAND WOULD LIKE TO UNDERSTAND HOW DIGITAL MEDIA CAN BE USED TO DRIVE PARTICIPATION OF SPORT.

GEMBA ANALYSED SPORTS PARTICIPATION AND DIGITAL MEDIA CONSUMPTION TRENDS, AND EXPLORED BEST-PRACTICE EXAMPLES, TO UNDERSTAND WHAT SUPPORT SPORT NEW ZEALAND CAN PROVIDE IN HELPING ITS STAKEHOLDERS IMPROVE THEIR DIGITAL MEDIA STRATEGIES.

THE ICONS BELOW ARE REPEATED THROUGHOUT THIS REPORT; EXPLANATIONS HAVE BEEN INCLUDED WHERE RELEVANT

ICONS KEY



INTERNET



SMARTPHONE



COMPUTER



TABLET



FACEBOOK



TWITTER



YOUTUBE



INSTAGRAM



MEMBERS

: *Participate 'with a club/centre (that you are a member of)'*



VOLUNTEERS

: *Have volunteered in a sport or recreation activity over the last 12 months*



FANATICAL
PARTICIPANTS

: *On a passion scale of 1-5 (1= not at all; 5= highly), rate their passion for a sport as a 5 and participate in a sport*



SOCIAL
PARTICIPANTS

: *State their primary motivation for sports participation is 'social interaction'*

- ① SITUATIONAL ASSESSMENT – SPORT CATEGORIES
- ② SITUATIONAL ASSESSMENT – SELECTED SPORTS
- ③ OPPORTUNITY ASSESSMENT
- ④ KEY INSIGHTS & LEARNINGS
- ⑤ CONSUMER MARKET SIZING



1

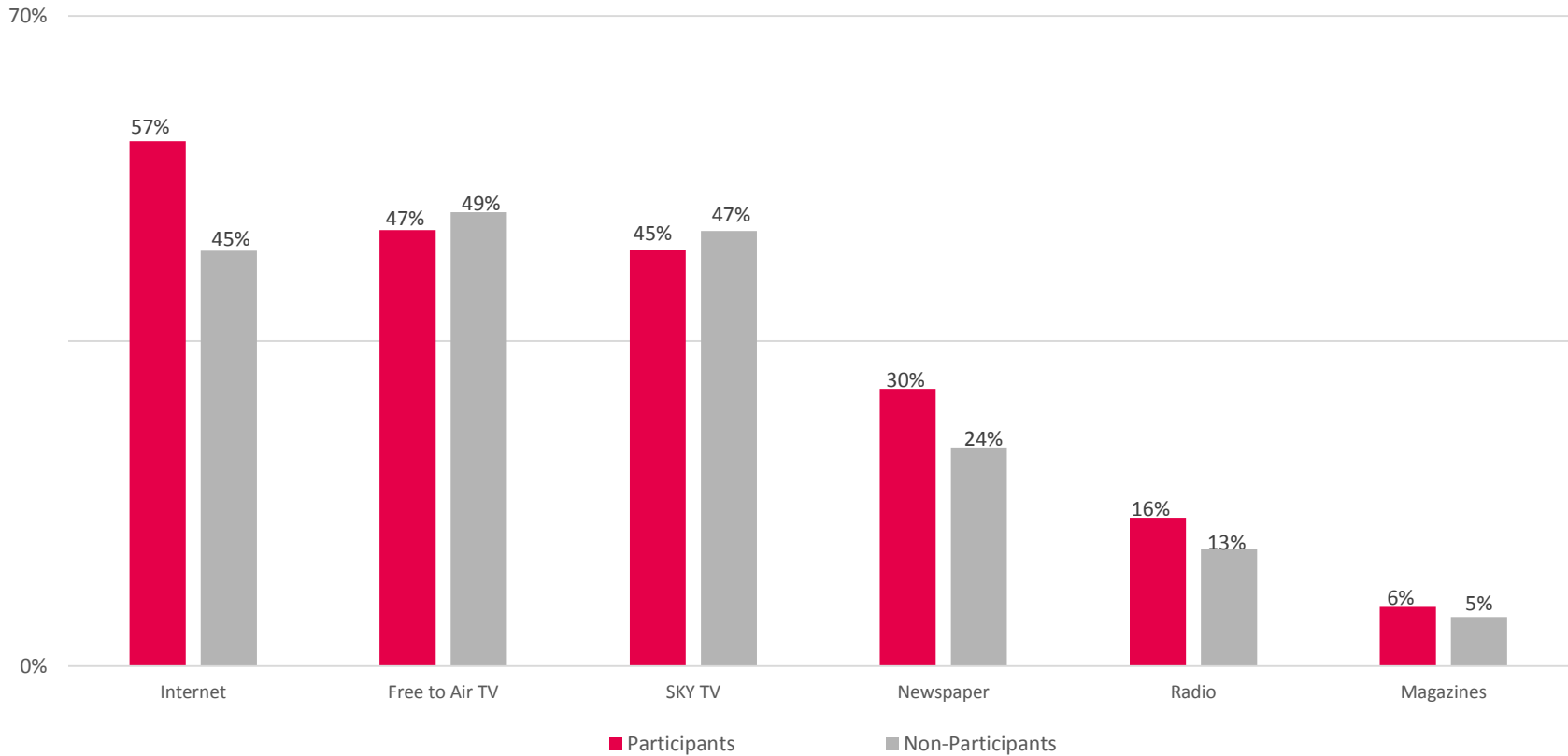
SITUATIONAL ASSESSMENT – SPORT CATEGORIES



PARTICIPANTS ARE 26% MORE LIKELY THAN NON-PARTICIPANTS TO USE THE INTERNET TO CONSUME SPORTS

PRIMARY CONSUMPTION CHANNELS

PARTICIPANTS VS. NON-PARTICIPANTS



Q. Which of these sources have you used to keep track of these sports/activities in the last week?



THE INTERNET IS THE PRIMARY CONSUMPTION CHANNEL FOR SPORTS PARTICIPANTS



TELEVISION CHANNELS
(SKY TV AND FREE TO
AIR) ARE THE PRIMARY
CONSUMPTION
CHANNELS FOR NON-
PARTICIPANTS

SPORT NEW ZEALAND HAVE IDENTIFIED SEVEN SPORTS CATEGORIES. THIS REPORT'S ANALYSIS RELATES TO THE BELOW CATEGORIES OR SPORT TYPES.

SPORT CATEGORIES

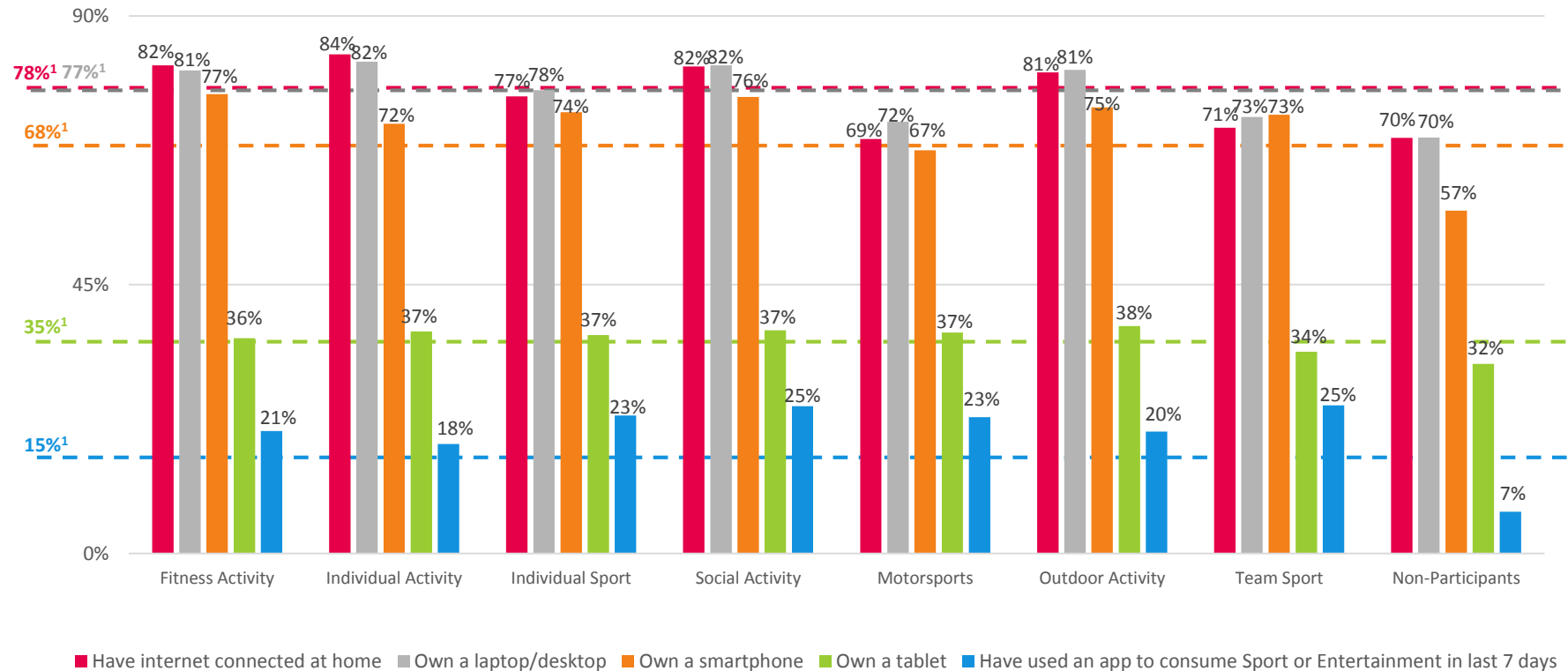
FITNESS ACTIVITIES	<ul style="list-style-type: none"> Dance Group Exercise Gym Workouts Pilates/Yoga 	n=4,049
INDIVIDUAL ACTIVITIES	<ul style="list-style-type: none"> Cycling Jogging/Running Swimming Walking 	n=7,344
INDIVIDUAL SPORTS	<ul style="list-style-type: none"> Athletics Boxing Martial Arts Triathlon Badminton Diving (boards) Rowing Bowls (indoor) Golf Squash Bowls (outdoor) Gymnastics Tennis 	n=2,720
SOCIAL ACTIVITIES	<ul style="list-style-type: none"> Beach Volleyball Snooker Darts Table Tennis Maori Sports Ten Pin Bowling Skateboarding 	n=2,721
MOTOR SPORTS	<ul style="list-style-type: none"> Motor Car Racing Motor Cycle Racing 	n=265
OUTDOOR ACTIVITIES	<ul style="list-style-type: none"> BMX Cycling Fishing (marine) Mountain Biking Sailing Surf Life Saving Canoeing/Kayaking Equestrian Orienteering Shooting Tramping Diving (scuba) Hunting Paddle Boarding Snow Sports Water Skiing Fishing (freshwater) Mountaineering Rock Climbing Surfing Windsurfing 	n=3,416
TEAM SPORTS	<ul style="list-style-type: none"> AFL Cricket Netball Touch Rugby American Football Football Rugby League Volleyball (indoor) Baseball Hockey Rugby Union Water Polo Basketball Lacrosse Softball 	n=2,381

'n=4,049' refers to the sample size of participants for each sport category

PARTICIPANTS OF FITNESS, INDIVIDUAL, SOCIAL AND OUTDOOR ACTIVITIES HAVE THE GREATEST DIGITAL ACCESS; MOTORSPORT PARTICIPANTS HAVE THE LOWEST

TECHNOLOGY OWNERSHIP

SPORT CATEGORIES VS. TOTAL POPULATION








Q. Indicate whether the following statements relate to you.
 % indicates relevant Total Population % for that statement.



SPORT CATEGORY
PARTICIPANTS ARE
BETTER CONNECTED
THAN NON-
PARTICIPANTS

OVERALL, NON-PARTICIPANTS ARE LESS LIKELY TO USE ONLINE AND SOCIAL MEDIA CHANNELS WHEN COMPARED WITH PARTICIPANTS ACROSS ALL SPORT CATEGORIES

DIGITAL SPORTS PROFILE

	INTERNET	OF THOSE WHO CONSUME VIA THE INTERNET:							APPS	
		SOCIAL MEDIA				WEBSITES				
	@	f				GENERAL NEWS	OFFICIAL SPORT/ACTIVITY	OFFICIAL CLUB		
FITNESS ACTIVITIES	59%	44%	7%	26%	8%	68%	32%	20%	8%	4%
INDIVIDUAL ACTIVITIES	56%	38%	6%	21%	6%	71%	32%	19%	6%	3%
INDIVIDUAL SPORTS	66%	45%	9%	30%	10%	64%	39%	24%	10%	5%
SOCIAL ACTIVITIES	62%	45%	7%	28%	8%	66%	37%	24%	10%	4%
MOTOR SPORTS	63%	55%	13%	44%	15%	48%	49%	30%	13%	6%
OUTDOOR ACTIVITIES	60%	43%	7%	26%	8%	67%	35%	21%	8%	4%
TEAM SPORTS	68%	48%	11%	31%	11%	62%	41%	28%	12%	6%
NON-PARTICIPANTS	45%	34%	6%	16%	2%	63%	30%	17%	4%	3%

Low

High

Q. Which of these sources have you used to keep track of these sports/activities in the last week?

Q. Which types of websites have you used to follow these sports/activities in the last week?

Base: n= 127 - 4,234



PARTICIPANTS OF INDIVIDUAL ACTIVITIES ARE LESS ENGAGED WITH DIGITAL AND SOCIAL MEDIA CHANNELS OVERALL WHEN COMPARED WITH OTHER SPORTS CATEGORIES; THIS GROUP ARE MOST LIKELY TO CONSUME VIA GENERAL NEWS WEBSITES



PENETRATION OF DEVICE
OWNERSHIP DOES NOT
DETERMINE LEVEL OF SOCIAL
MEDIA OR APP USAGE.

CONSEQUENTLY, SPORTS CAN
FOCUS UPON TARGET OR
NICHE AUDIENCES.



DESPITE HAVING THE HIGHEST
LEVEL OF DIGITAL DEVICE
OWNERSHIP, INDIVIDUAL
ACTIVITY PARTICIPANTS HAVE
THE LOWEST USAGE OF SOCIAL
MEDIA AND APPS



FACEBOOK, YOUTUBE AND
OFFICIAL SITES ARE THE KEY
DIGITAL CHANNELS FOR
ENGAGING WITH PARTICIPANTS
ACROSS ALL SPORT
CATEGORIES



ACROSS ALL SPORT
PARTICIPATION CATEGORIES,
CONSUMPTION VIA
INSTAGRAM IS GREATER THAN
THAT VIA TWITTER

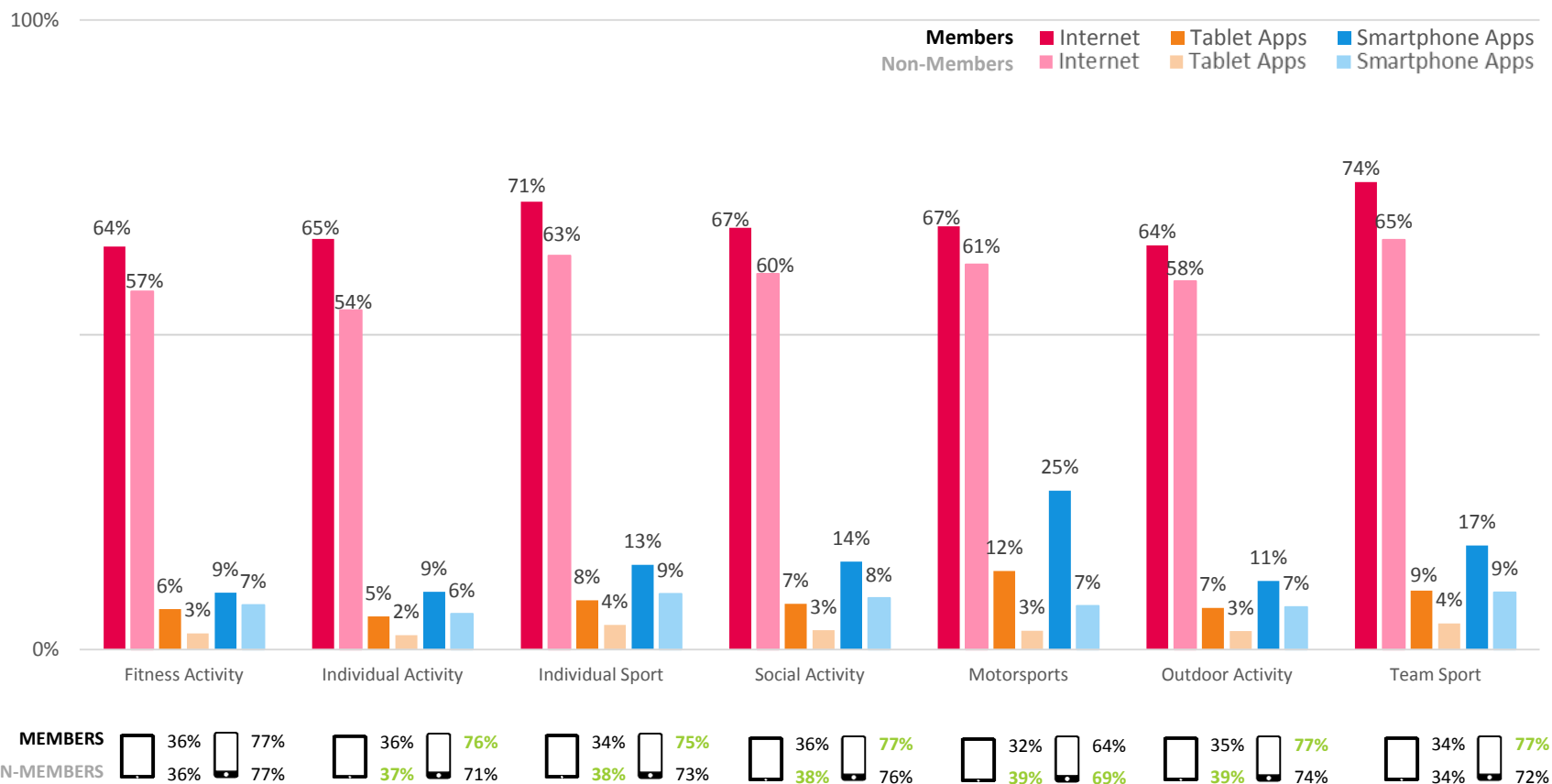


SMARTPHONE APPS ARE TWICE
AS POPULAR FOR
CONSUMPTION VERSUS TABLET
APPS, ALTHOUGH BOTH ARE
STILL LOW WHEN COMPARED
WITH FACEBOOK AND
YOUTUBE



ONLINE CHANNELS (VIA A
DESKTOP AND MOBILE)
SHOULD BE A PRIORITY FOR
SPORTS ORGANISATIONS
VERSUS APPS, AS APP
CONSUMPTION IS RELATIVELY
LOW ACROSS ALL SPORT
PARTICIPATION CATEGORIES

DIGITAL CONSUMPTION: MEMBERS VS. NON-MEMBERS



Q. Which of these sources have you used to keep track of these sports/activities in the last week?

Base: n= 62 – 3,399

1. Green percentage (e.g. 37%) indicates whether members or non-members have the higher ownership of smartphones or tablets



MEMBERS ARE MORE
ENGAGED WITH DIGITAL
CHANNELS THAN NON-
MEMBERS DESPITE
COMPARABLE
SMARTPHONE/
TABLET OWNERSHIP



MEMBERS OF TEAM SPORTS ARE MOST LIKELY TO CONSUME SPORT VIA THE INTERNET WHEN COMPARED WITH OTHER SPORT TYPE PARTICIPANTS.

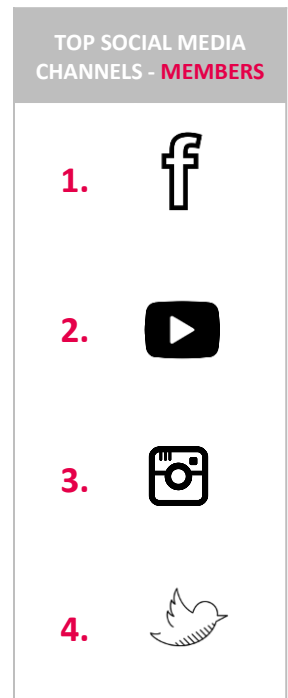
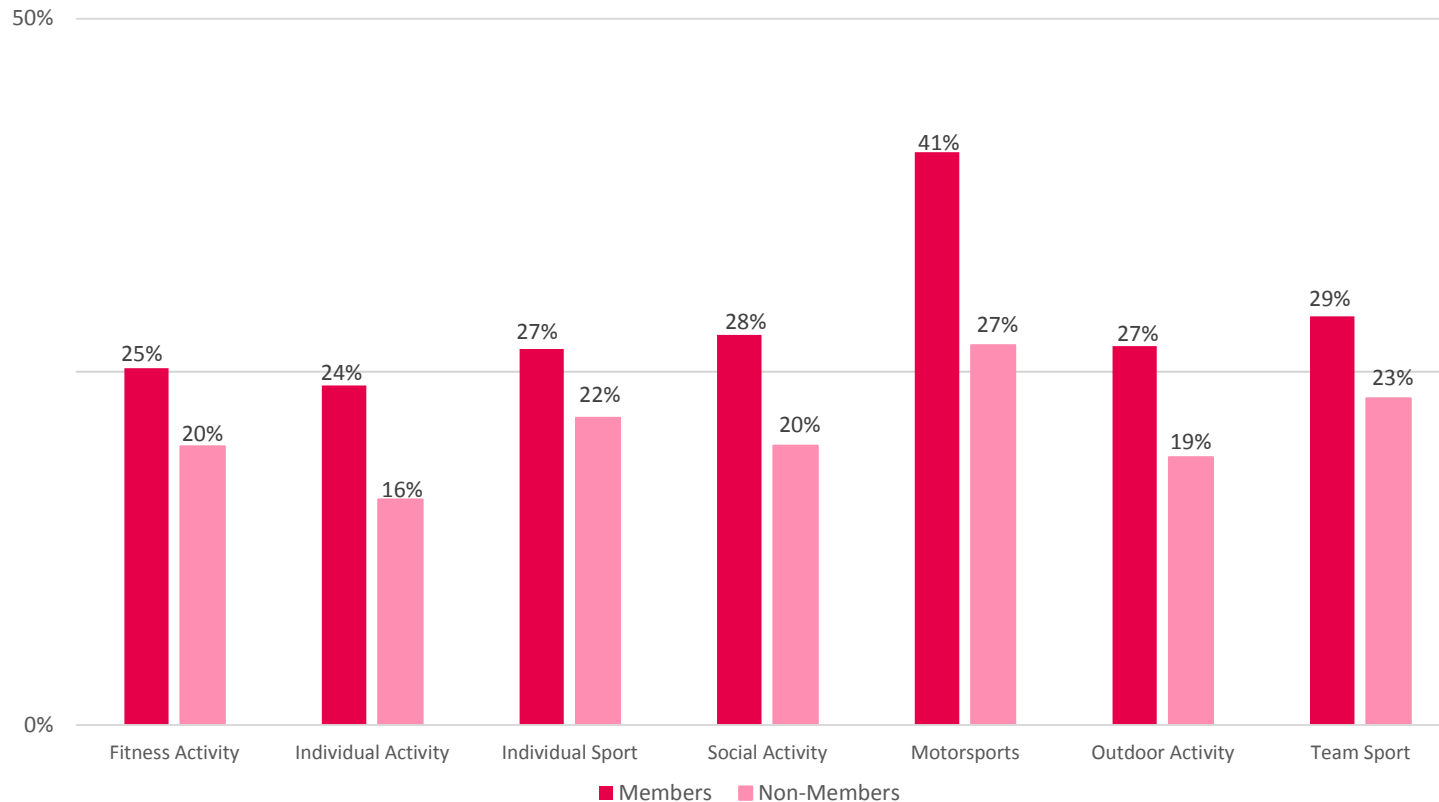
MOTORSPORT MEMBERS ARE MOST LIKELY TO USE APPS FOR CONSUMPTION DESPITE HAVING THE LOWEST TECHNOLOGY OWNERSHIP/CONNECTIVITY AMONG THE SPORT CATEGORIES.

MEMBERS ARE MORE LIKELY TO CONSUME VIA SOCIAL MEDIA CHANNELS THAN NON-MEMBERS



AVERAGE SOCIAL MEDIA¹ CONSUMPTION (OF THOSE WHO CONSUME ONLINE)

MEMBERS VS. NON-MEMBERS



Q. Which types of websites have you used to follow these sports/activities in the last week?

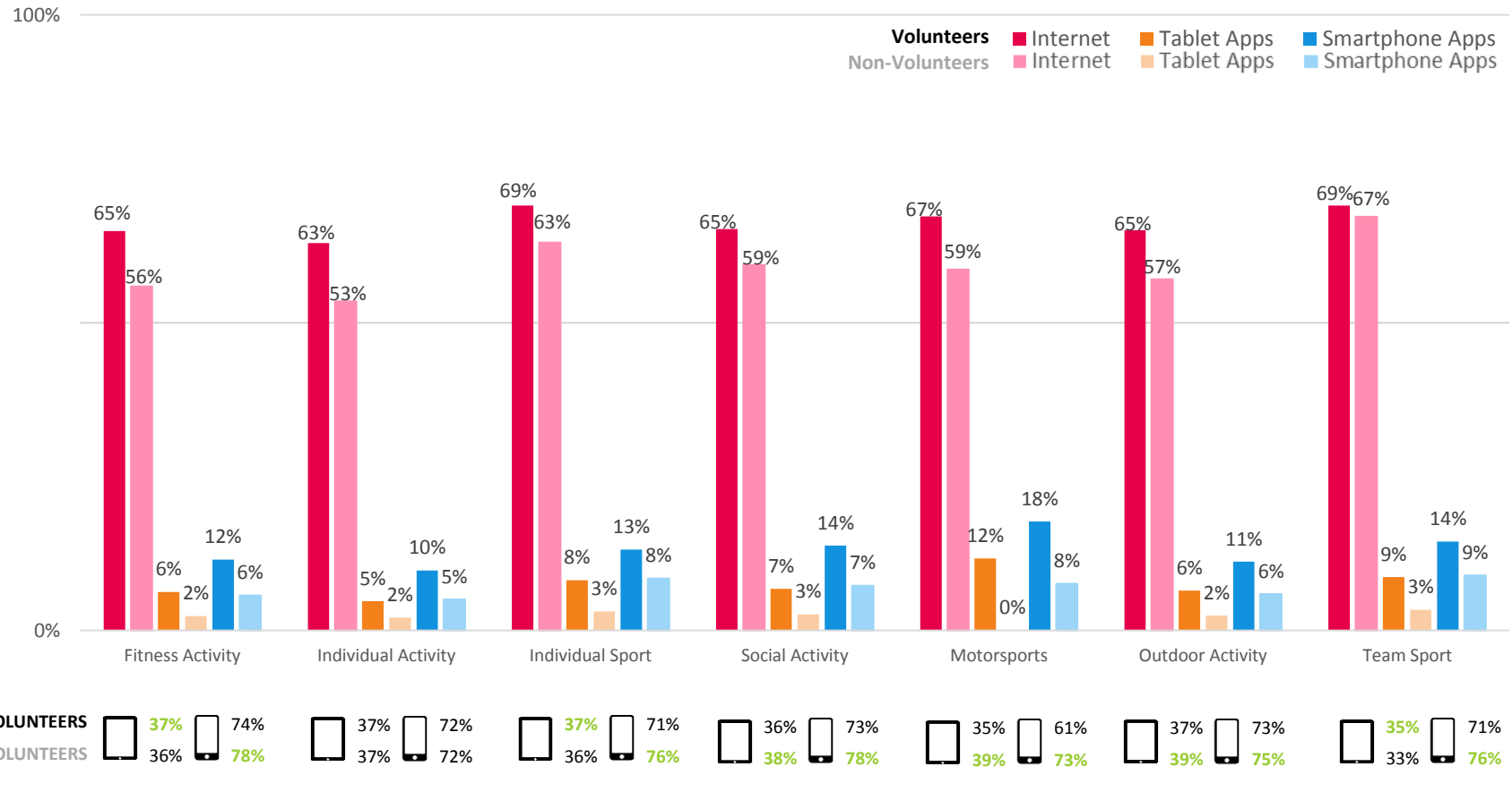
1. Average consumption via Facebook, YouTube, Twitter and Instagram

Base: n= 46 - 2,044

NB. Please interpret Motorsports with caution due to lower sample size (n=46)



DIGITAL CONSUMPTION: VOLUNTEERS VS. NON-VOLUNTEERS



Q. Which of these sources have you used to keep track of these sports/activities in the last week?

1. Green percentage (e.g. **37%**) indicates whether volunteers or non-volunteers have the higher ownership of smartphones or tablets

Base: n= 99 - 3,309



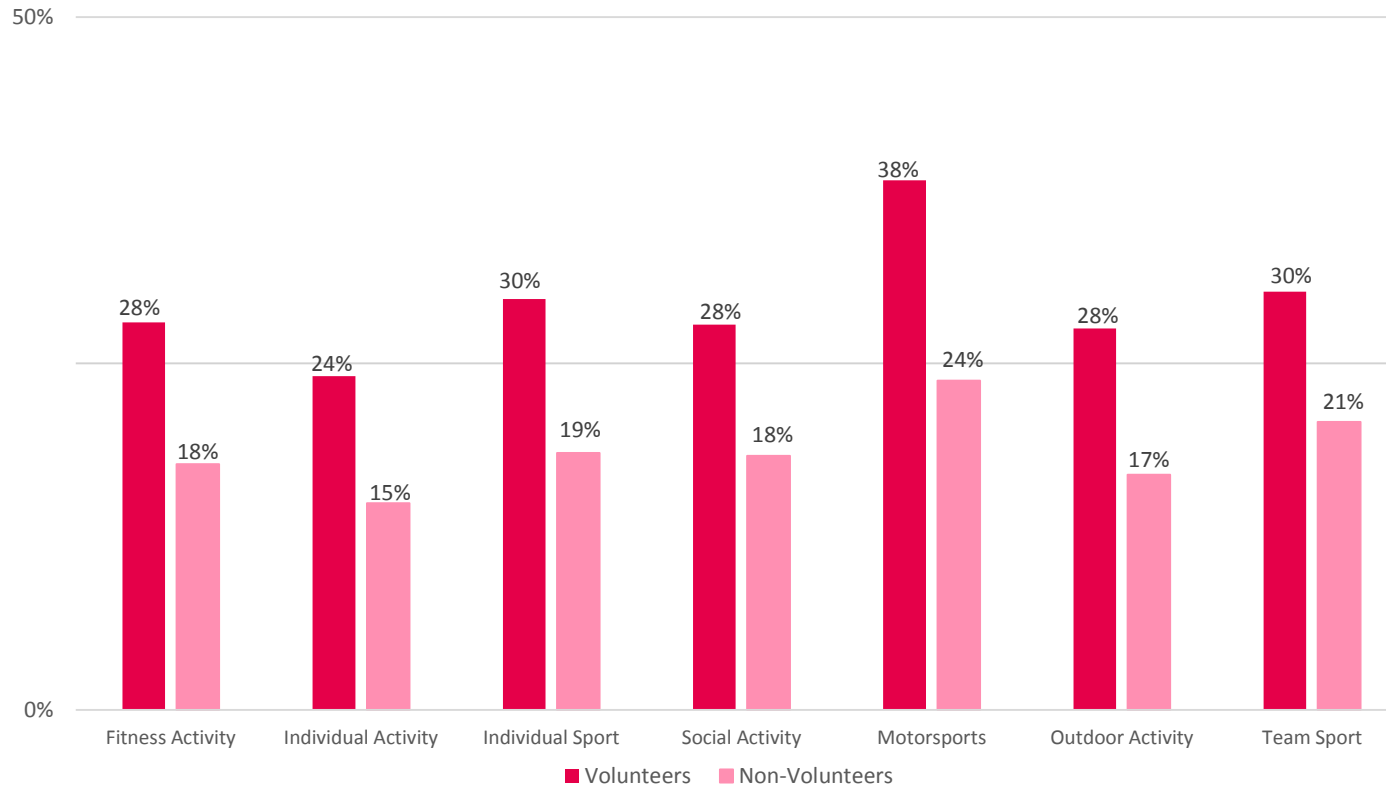
VOLUNTEERS ARE MORE
LIKELY TO USE DIGITAL
CHANNELS AND APPS FOR
SPORTS CONSUMPTION
WHEN COMPARED WITH
NON-VOLUNTEERS, DESPITE
OFTEN LOWER OWNERSHIP
OF SMARTPHONES/TABLETS

SOCIAL MEDIA CONSUMPTION OF SPORT IS HIGHER AMONG VOLUNTEERS COMPARED WITH NON-VOLUNTEERS






AVERAGE SOCIAL MEDIA¹ CONSUMPTION (OF THOSE WHO CONSUME ONLINE)

VOLUNTEERS VS. NON-VOLUNTEERS



TOP SOCIAL MEDIA CHANNELS - VOLUNTEERS

1. 
2. 
3.  

Motorsports and Team Sports Participants consume via Twitter more than Instagram

Q. Which types of websites have you used to follow these sports/activities in the last week?

1. Average consumption via Facebook, YouTube, Twitter and Instagram

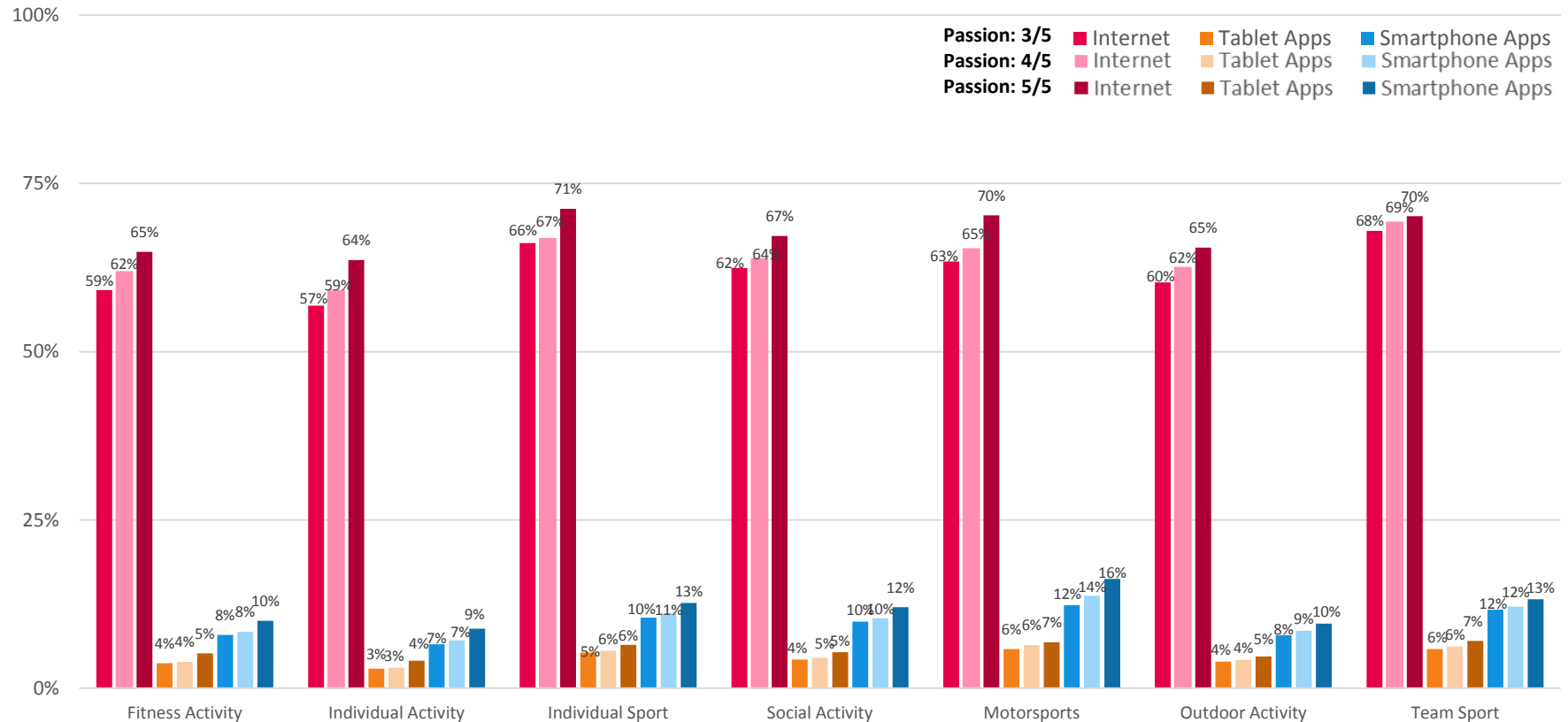
Base: n= 55 – 1,804



AS PASSION FOR SPORT INCREASES, DIGITAL CONSUMPTION INCREASES

DIGITAL CONSUMPTION

PASSIONATE PARTICIPANTS



Q. Which of these sources have you used to keep track of these sports/activities in the last week?

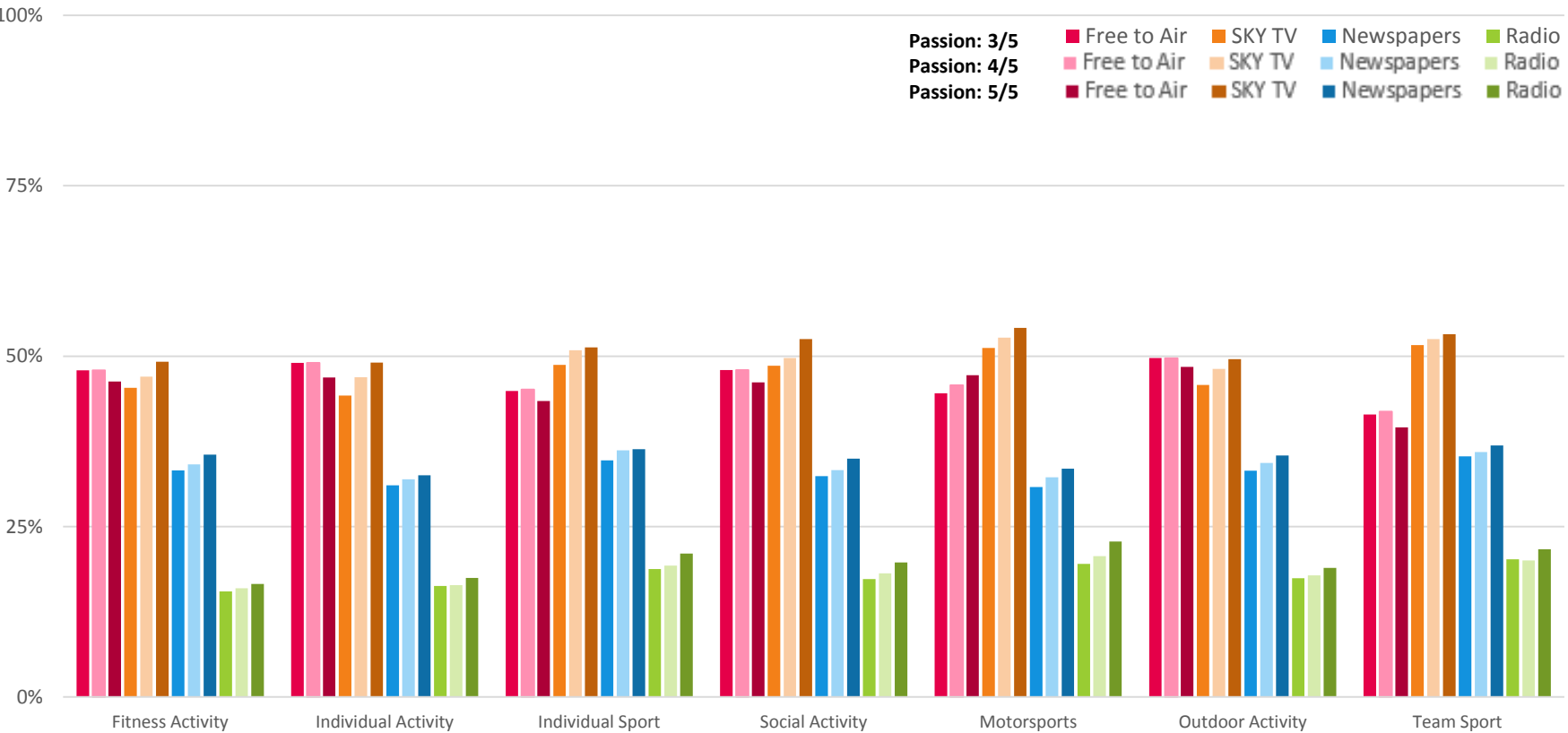
Base: n= 135 – 3,960

FREE TO AIR TELEVISION IS THE ONLY CONSUMPTION CHANNEL TO DECLINE AS PASSION FOR SPORT INCREASES



NON-DIGITAL CONSUMPTION CHANNELS

PASSIONATE PARTICIPANTS



Q. Which of these sources have you used to keep track of these sports/activities in the last week?

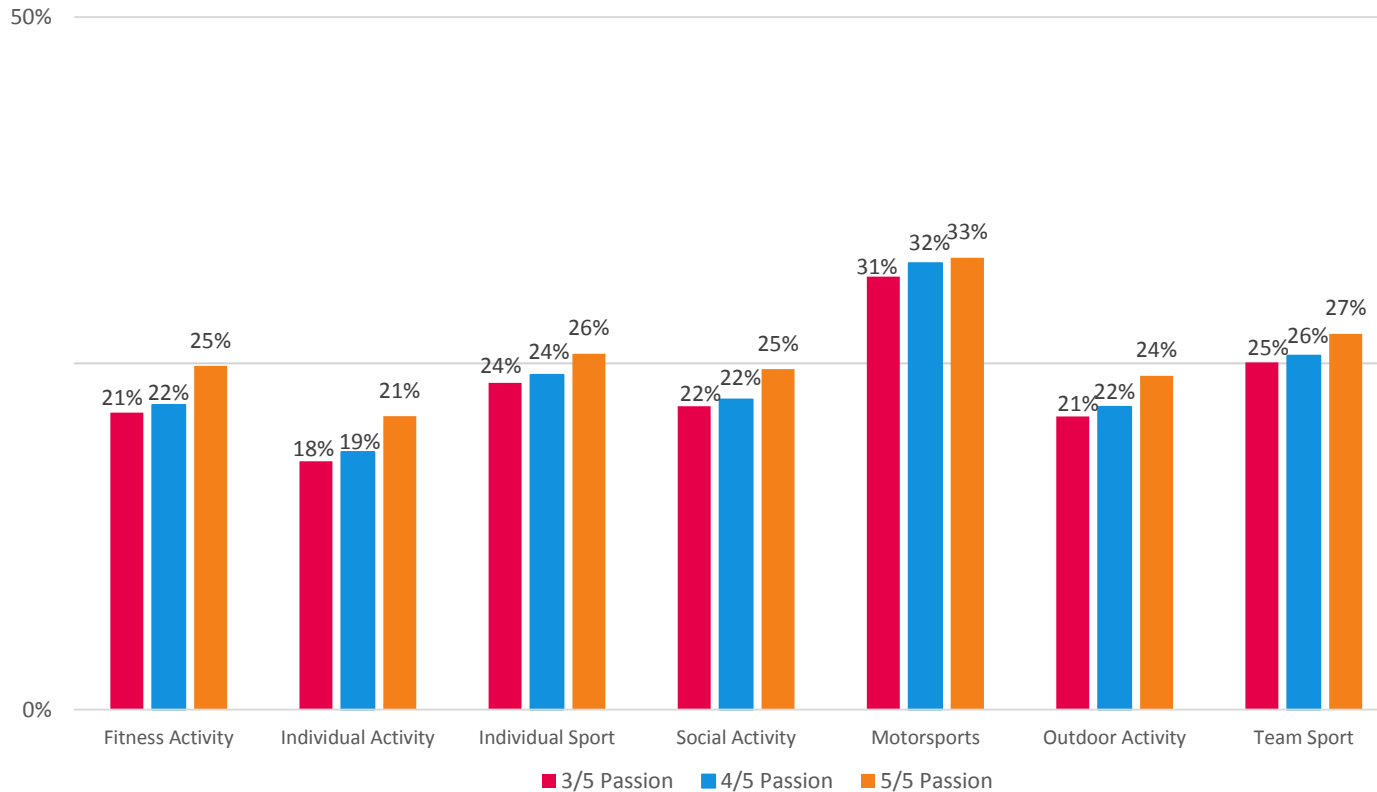
Base: n= 135 – 3,960

INCREASED FANATICISM FOR SPORT INCREASES THE LIKELIHOOD OF SPORTS CONSUMPTION VIA SOCIAL MEDIA



AVERAGE SOCIAL MEDIA¹ CONSUMPTION (OF THOSE WHO CONSUME ONLINE)

PASSIONATE PARTICIPANTS



TOP SOCIAL MEDIA CHANNELS – FANATICS²

- 1.
- 2.
- 3.
- 4.

Q. Which types of websites have you used to follow these sports/activities in the last week?

1. Average consumption via Facebook, YouTube, Twitter and Instagram
2. Fanatics are those who rate their passion for a sport as 5 out of 5.

Base: n= 102 - 2,492



INCREASED PASSION FOR SPORT CORRELATES WITH INCREASED DIGITAL AND SOCIAL MEDIA CONSUMPTION



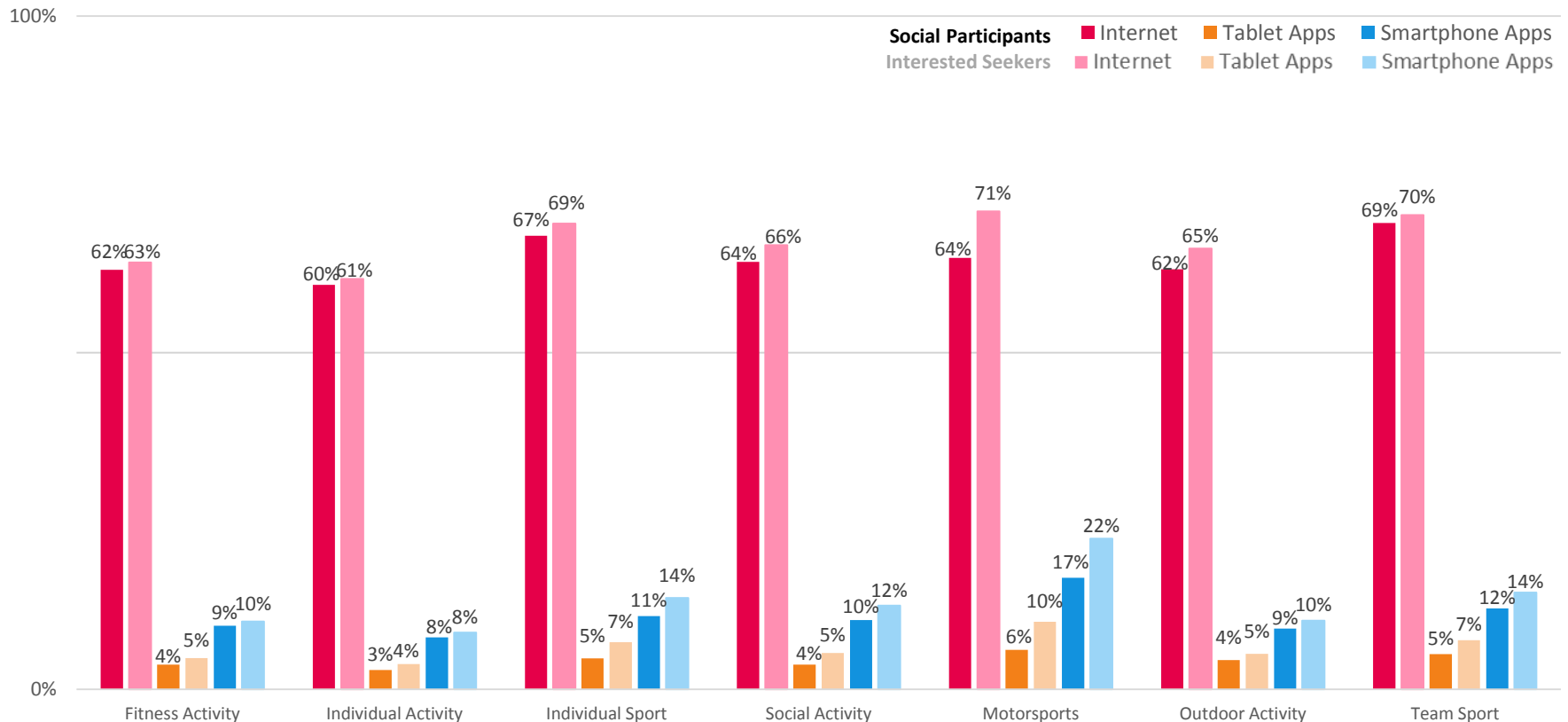
FACEBOOK IS THE PRIMARY
SOCIAL MEDIA CHANNEL
AMONG PASSIONATE
PARTICIPANTS, FOLLOWED BY
YOUTUBE

INTERESTED SEEKERS USE DIGITAL CHANNELS MORE FOR SPORT CONSUMPTION COMPARED WITH SOCIAL PARTICIPANTS



DIGITAL CONSUMPTION

SOCIAL PARTICIPANTS VS. INTERESTED SEEKERS²



Q. Which of these sources have you used to keep track of these sports/activities in the last week?

1. 'Social Participants' are those who are motivated to partake for social reasons. 'Interested Seekers' are those who are interested in participating but don't because they can't find someone to participate with / don't know where to participate.

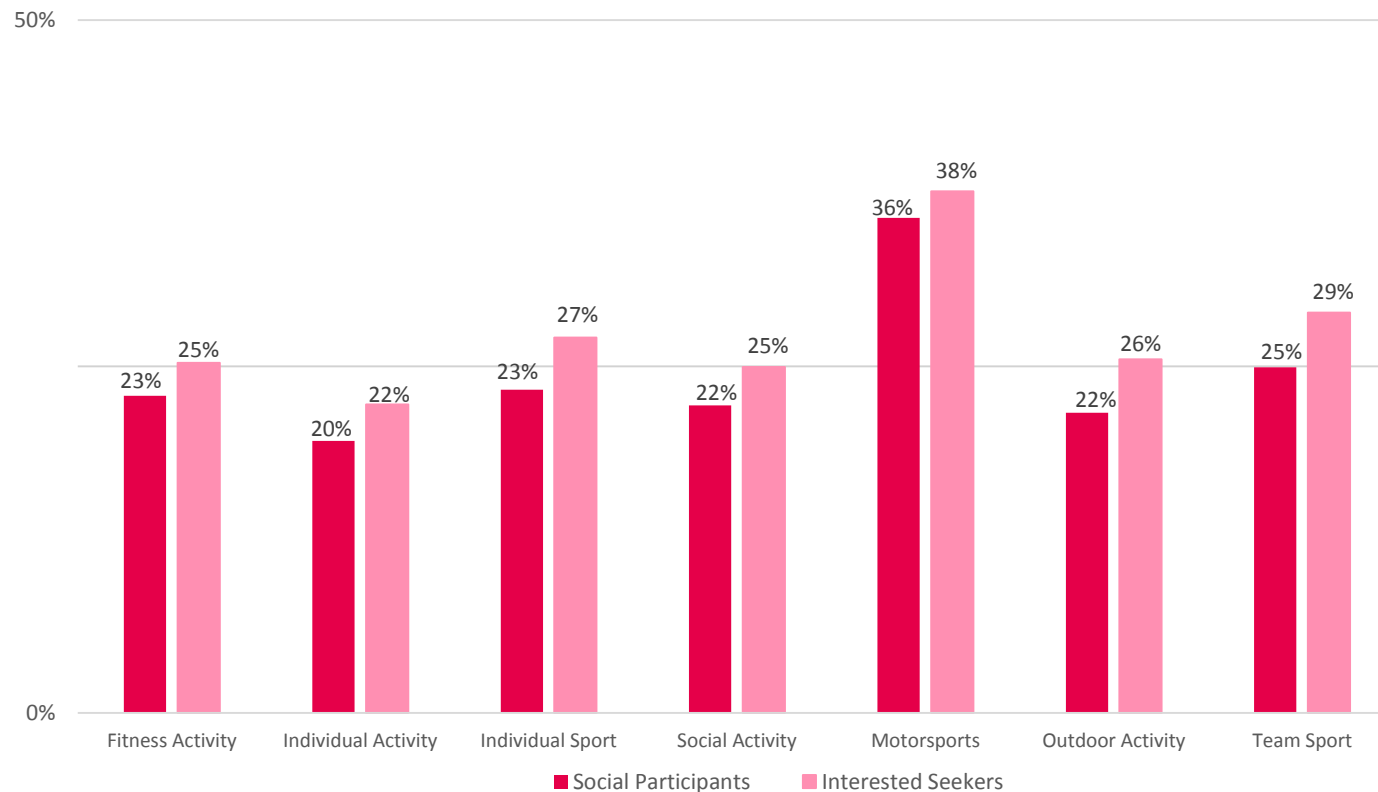
Base: n= 94 - 2,107

SOCIAL MEDIA WOULD BE A RELEVANT CHANNEL TO ASSIST THOSE WHO DO NOT PARTICIPATE DUE TO A LACK OF A PLACE, OR PEOPLE TO PLAY WITH



AVERAGE SOCIAL MEDIA¹ CONSUMPTION (OF THOSE WHO CONSUME ONLINE)

SOCIAL PARTICIPANTS VS. INTERESTED SEEKERS²



TOP SOCIAL MEDIA CHANNELS FOR **SOCIAL PARTICIPANTS** & **INTERESTED SEEKERS**

1.



2.



3.



4.



Q. Which types of websites have you used to follow these sports/activities in the last week?

1. Average consumption via Facebook, YouTube, Twitter and Instagram
2. 'Social Participants' are those who are motivated to partake for social reasons. 'Interested Seekers' are those who are interested in participating but don't because they can't find someone to participate with / don't know where to participate.

Base: n= 71 – 1,372



DIGITAL AND SOCIAL MEDIA CHANNELS ARE IMPORTANT FOR ENGAGING WITH THOSE WHO HAVE NO ONE TO PARTICIPATE WITH, OR ARE UNSURE WHERE TO PARTICIPATE; THIS IS DEMONSTRATED BY INTERESTED SEEKERS' INCREASED CONSUMPTION VIA THESE CHANNELS WHEN COMPARED WITH SOCIAL PARTICIPANTS



FACEBOOK IS THE PRIMARY
SOCIAL MEDIA CHANNEL FOR
SPORT CONSUMPTION AMONG
BOTH SOCIAL PARTICIPANTS
AND INTERESTED SEEKERS





















2

SITUATIONAL ASSESSMENT – SELECTED SPORTS



SPORT NEW ZEALAND HAVE IDENTIFIED 20 SELECTED SPORTS¹ FOR ADDITIONAL ANALYSIS

SELECTED SPORTS

						
Athletics	Basketball	Bowls	Canoeing	Cricket	Cycling	Equestrian
n=240	n=640	n=243	n=581	n=648	n=1,314	n=244
						
Football	Golf	Gymnastics	Hockey	Netball	Rowing	
n=859	n=730	n=139	n=225	n=465	n=120	
						
Rugby League	Rugby Union	Snow Sports	Swimming	Tennis	Triathlon	Yachting
n=191	n=303	n=325	n=2,638	n=681	n=91	n=162

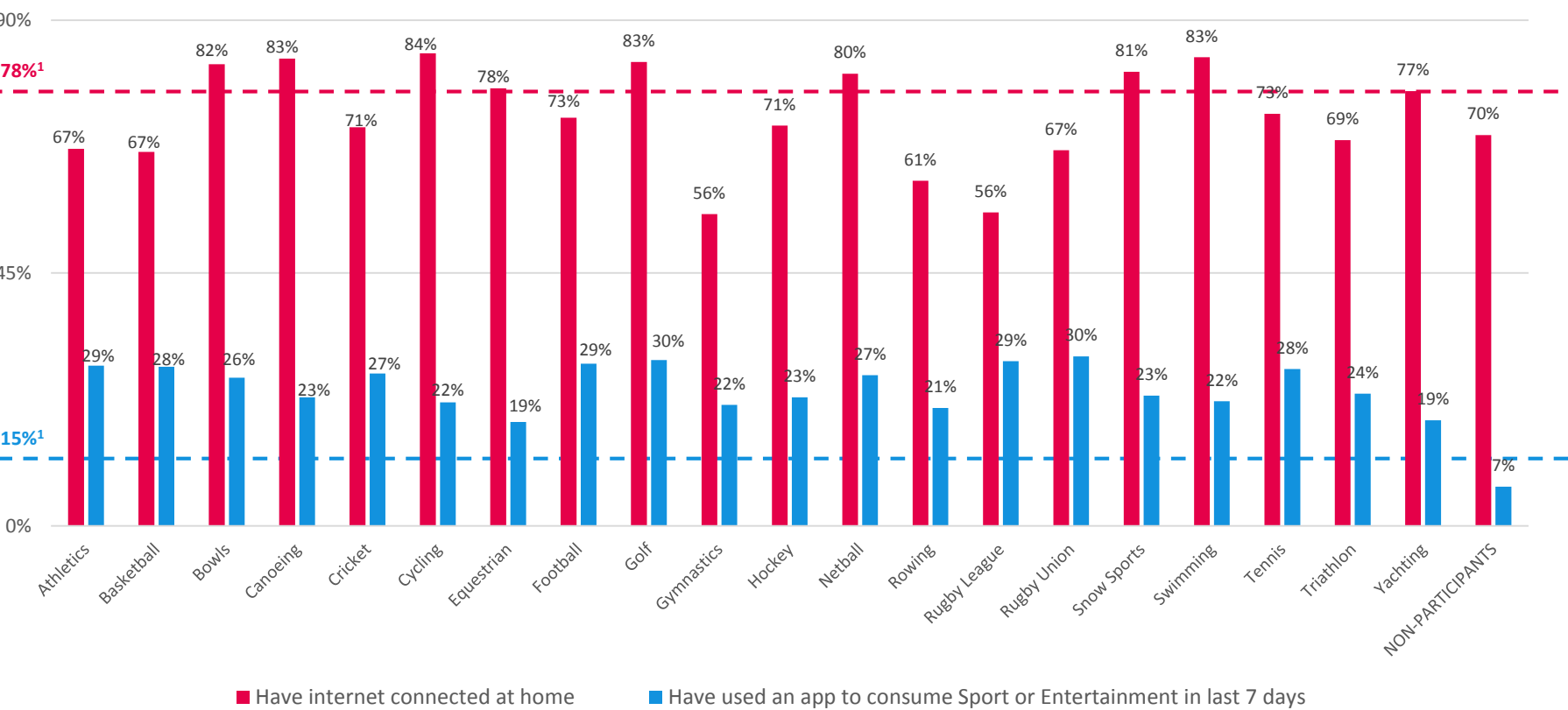
1. Paralympics not included as a sport within Gemba's research programme

2. 'n=240' refers to the sample size of participants for each sport

OVER HALF OF SPECIFIC SPORT PARTICIPANTS UNDER-INDEX FOR HAVING THE INTERNET CONNECTED AT HOME WHEN COMPARED WITH THE TOTAL POPULATION

CONNECTIVITY AND APP USAGE

SELECTED SPORTS VS. TOTAL POPULATION



Q. Indicate whether the following statements relate to you.
1. % indicates relevant Total Population % for that statement.

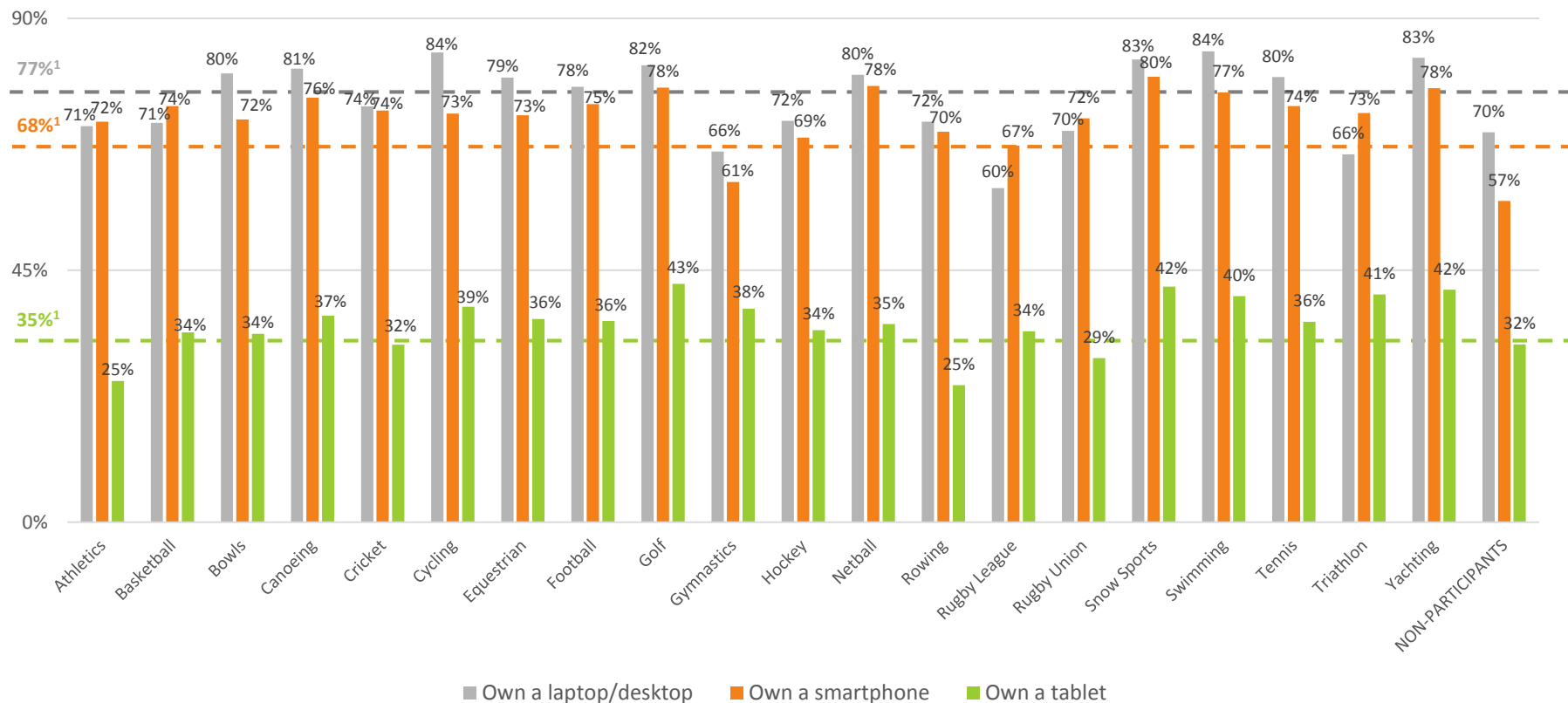


SELECTED SPORTS PARTICIPANTS OVER-INDEX FOR APP USAGE WITHIN THE LAST SEVEN DAYS COMPARED WITH THE TOTAL POPULATION AND NON-PARTICIPANTS

SWIMMING AND CYCLING PARTICIPANTS ARE MOST LIKELY TO OWN A LAPTOP/DESKTOP; SNOW SPORTS PARTICIPANTS ARE MOST LIKELY TO OWN A SMARTPHONE

TECHNOLOGY OWNERSHIP

SELECTED SPORTS VS. TOTAL POPULATION



Q. Indicate whether the following statements relate to you.

1. % indicates relevant Total Population % for that statement.








PARTICIPANTS OF SELECTED
SPORTS ARE MORE LIKELY
THAN NON-PARTICIPANTS
TO OWN A SMARTPHONE



SMARTPHONE PENETRATION IS
AT SIMILAR LEVELS TO
DESKTOP/LAPTOP OWNERSHIP –
THE ‘AVAILABLE ANYTIME’
NATURE OF SMARTPHONES
PRESENTS AN OPPORTUNITY FOR
ALL SPORTS ORGANISATIONS

GYMNASTICS AND ATHLETICS PARTICIPANTS ARE NOTABLE USERS OF DIGITAL AND SOCIAL MEDIA CHANNELS FOR SPORT CONSUMPTION

DIGITAL SPORTS PROFILE

	INTERNET	OF THOSE WHO CONSUME VIA THE INTERNET:							APPS	
		SOCIAL MEDIA				WEBSITES				
	@	f				GENERAL NEWS	OFFICIAL SPORT/ACTIVITY	OFFICIAL CLUB		
ATHLETICS	71%	68%	15%	46%	22%	59%	38%	29%	14%	9%
BASKETBALL	71%	57%	14%	41%	17%	56%	46%	29%	13%	7%
BOWLS	62%	37%	6%	21%	11%	69%	37%	24%	11%	4%
CANOEING	68%	44%	7%	26%	6%	68%	32%	21%	7%	2%
CRICKET	69%	46%	13%	29%	11%	65%	46%	28%	13%	7%
CYCLING	60%	39%	7%	24%	5%	67%	32%	21%	7%	2%
EQUESTRIAN	59%	60%	10%	37%	15%	55%	34%	32%	9%	8%
FOOTBALL	74%	50%	11%	33%	11%	62%	42%	31%	13%	5%
GOLF	67%	37%	7%	23%	9%	77%	42%	23%	11%	6%
GYMNASTICS	64%	75%	22%	46%	23%	36%	54%	40%	15%	9%
NON-PARTICIPANTS	45%	34%	6%	16%	2%	63%	30%	17%	4%	3%

Low

High






Q. Which of these sources have you used to keep track of these sports/activities in the last week?

Q. Which types of websites have you used to follow these sports/activities in the last week?

Base: n= 56 - 815

SOCIAL MEDIA CONSUMPTION AMONG SWIMMING PARTICIPANTS IS RELATIVELY LOW

DIGITAL SPORTS PROFILE

	INTERNET	OF THOSE WHO CONSUME VIA THE INTERNET:								
		SOCIAL MEDIA				WEBSITES				
	@	f				GENERAL NEWS	OFFICIAL SPORT/ACTIVITY	OFFICIAL CLUB		
HOCKEY	74%	60%	12%	31%	17%	53%	44%	24%	17%	9%
NETBALL	63%	59%	5%	29%	11%	65%	38%	25%	11%	3%
ROWING	65%	67%	7%	28%	19%	63%	48%	29%	11%	4%
RUGBY LEAGUE	66%	55%	15%	47%	16%	58%	47%	34%	16%	9%
RUGBY UNION	67%	47%	9%	35%	13%	65%	43%	32%	16%	6%
SNOW SPORTS	64%	47%	12%	26%	11%	64%	37%	18%	7%	3%
SWIMMING	59%	45%	7%	25%	7%	67%	32%	20%	7%	4%
TENNIS	68%	50%	13%	32%	13%	65%	42%	25%	12%	6%
TRIATHLON	76%	79%	25%	37%	38%	40%	51%	39%	19%	13%
YACHTING	60%	48%	10%	35%	15%	68%	47%	29%	13%	2%
NON-PARTICIPANTS	45%	34%	6%	16%	2%	63%	30%	17%	4%	3%

Low

High

Q. Which of these sources have you used to keep track of these sports/activities in the last week?

Q. Which types of websites have you used to follow these sports/activities in the last week?

Base: n= 44 – 1,606

NB. Please interpret Triathlon Social Media with caution due to lower sample size (n=44)



FACEBOOK, YOUTUBE AND
OFFICIAL SPORTS SITES PRESENT AN
OPPORTUNITY FOR ALL SPORTS.

BASED UPON HIGH SMARTPHONE
PENETRATION LEVELS, A DIGITAL
MOBILE STRATEGY SHOULD ALSO
BE PART OF ANY
COMMUNICATIONS STRATEGY.



OVERALL, NON-PARTICIPANTS
ARE LESS LIKELY TO USE ONLINE
AND SOCIAL MEDIA CHANNELS
WHEN COMPARED WITH
PARTICIPANTS OF SELECTED
SPORTS



ATHLETICS, BASKETBALL,
GYMNASTICS AND RUGBY
LEAGUE PARTICIPANTS ARE
PARTICULARLY ENGAGED WITH
YOUTUBE FOR SPORTS
CONSUMPTION



INSTAGRAM RESONATES THE MOST WITH ATHLETICS, GYMNASTICS AND TRIATHLON PARTICIPANTS, WHILST IT RESONATES THE LEAST WITH CANOEING, GOLF AND SWIMMING PARTICIPANTS

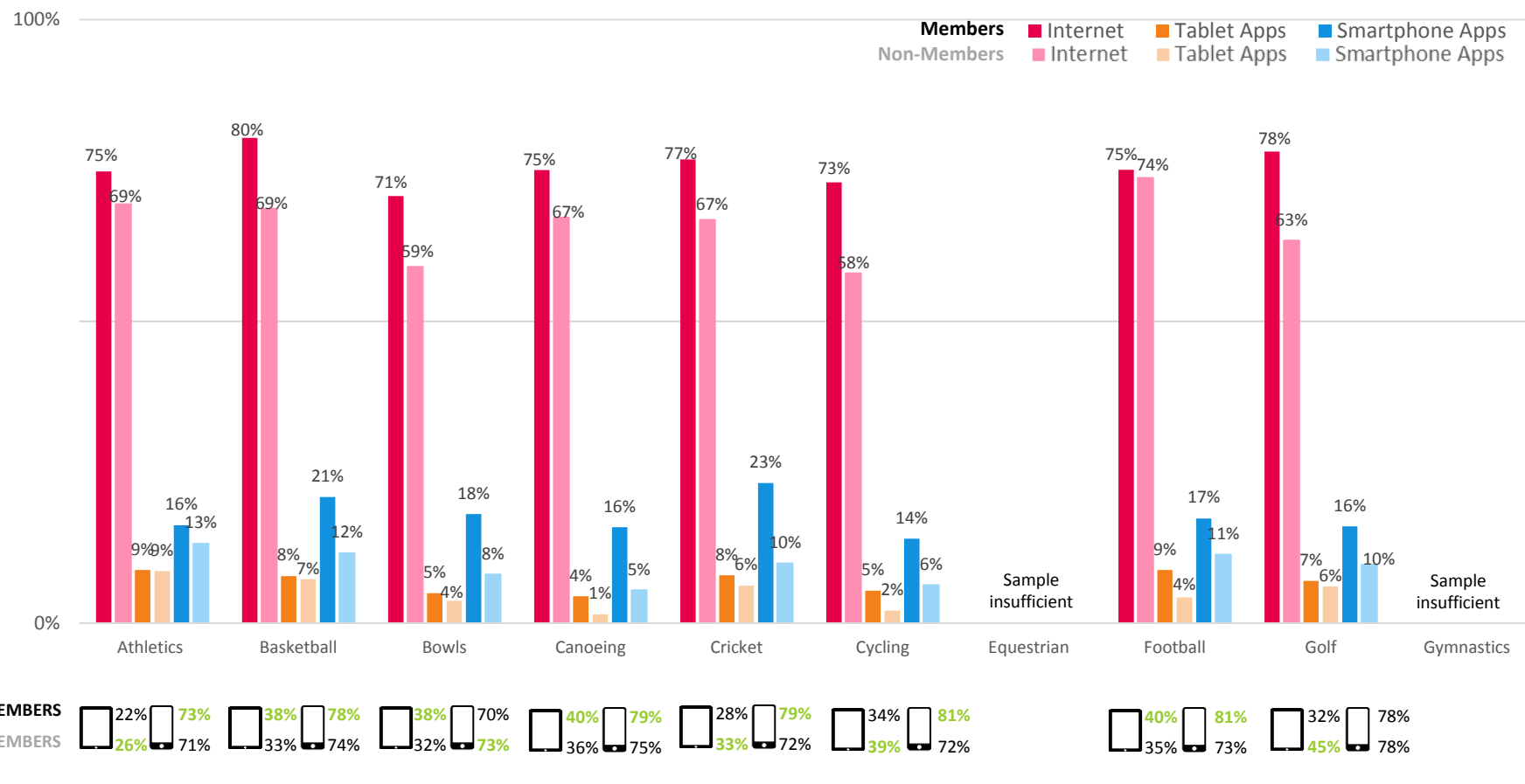


CONSUMPTION OF SPORT VIA
OFFICIAL CLUB WEBSITES IS
PARTICULARLY STRONG AMONG
EQUESTRIAN, FOOTBALL,
GYMNASTICS, RUGBY LEAGUE,
SNOW SPORTS AND TRIATHLON
PARTICIPANTS



CONSUMPTION OF SPORT VIA
SMARTPHONE APPS IS GENERALLY
2X OR 3X MORE LIKELY THAN
CONSUMPTION VIA TABLET APPS,
ALTHOUGH BOTH CHANNELS ARE
LOW COMPARED WITH INTERNET
CHANNELS, SO THE LATTER
SHOULD BE A PRIORITY.

DIGITAL CONSUMPTION: MEMBERS VS. NON-MEMBERS



Q. Which of these sources have you used to keep track of these sports/activities in the last week?

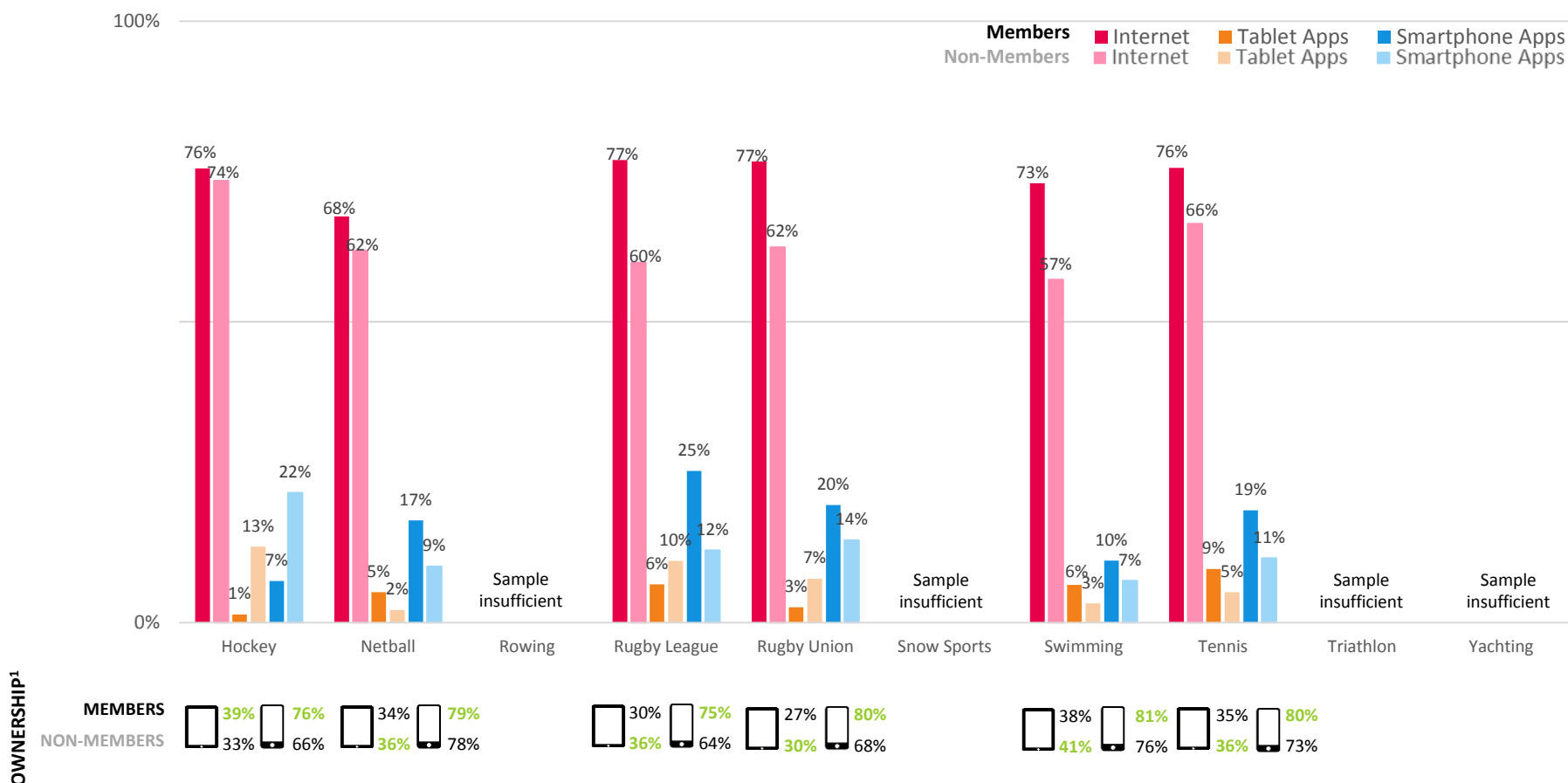
- Green percentage (e.g. 26%) indicates whether members or non-members have the higher ownership of smartphones or tablets

Base: n= 48 – 728

NB. Please interpret Athletics and Canoeing with caution due to lower sample sizes (n=48-49)



DIGITAL CONSUMPTION: MEMBERS VS. NON-MEMBERS



Q. Which of these sources have you used to keep track of these sports/activities in the last week?

1. Green percentage (e.g. **39%**) indicates whether members or non-members have the higher ownership of smartphones or tablets

Base: n = 47 – 1,414

NB. Please interpret Hockey and Rugby League with caution due to lower sample sizes (n=47-48)



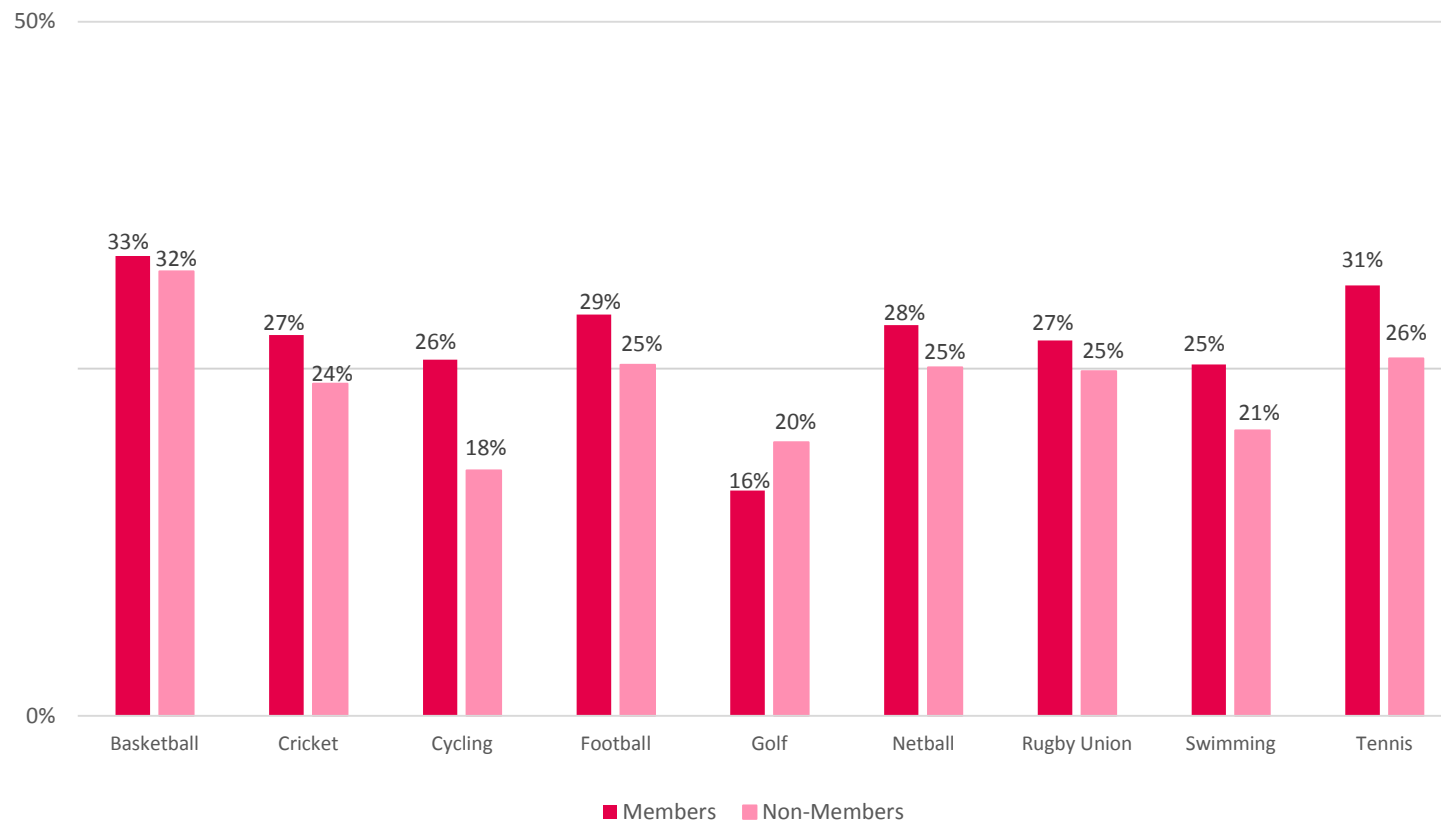
THE HIGHER THE SPORTS
ENGAGEMENT, THE GREATER THE USE
OF DIGITAL PLATFORMS; MEMBERS
AND VOLUNTEERS OF SELECTED
SPORTS ARE GENERALLY MOST LIKELY
TO USE THE INTERNET AND APPS FOR
SPORT CONSUMPTION, DESPITE
DIGITAL OWNERSHIP BEING
COMPARABLE WITH NON-MEMBERS
AND NON-VOLUNTEERS

OVERALL MEMBERS OF SELECTED SPORTS USE SOCIAL MEDIA MORE THAN NON-MEMBERS







AVERAGE SOCIAL MEDIA¹ CONSUMPTION (OF THOSE WHO CONSUME ONLINE)

MEMBERS² VS. NON-MEMBERS



TOP SOCIAL MEDIA CHANNELS – MEMBERS²

1. 
2. 
3. 
4. 

Q. Which types of websites have you used to follow these sports/activities in the last week?

1. Average consumption via Facebook, YouTube, Twitter and Instagram.
2. selected sports omitted where sample sizes insufficient.

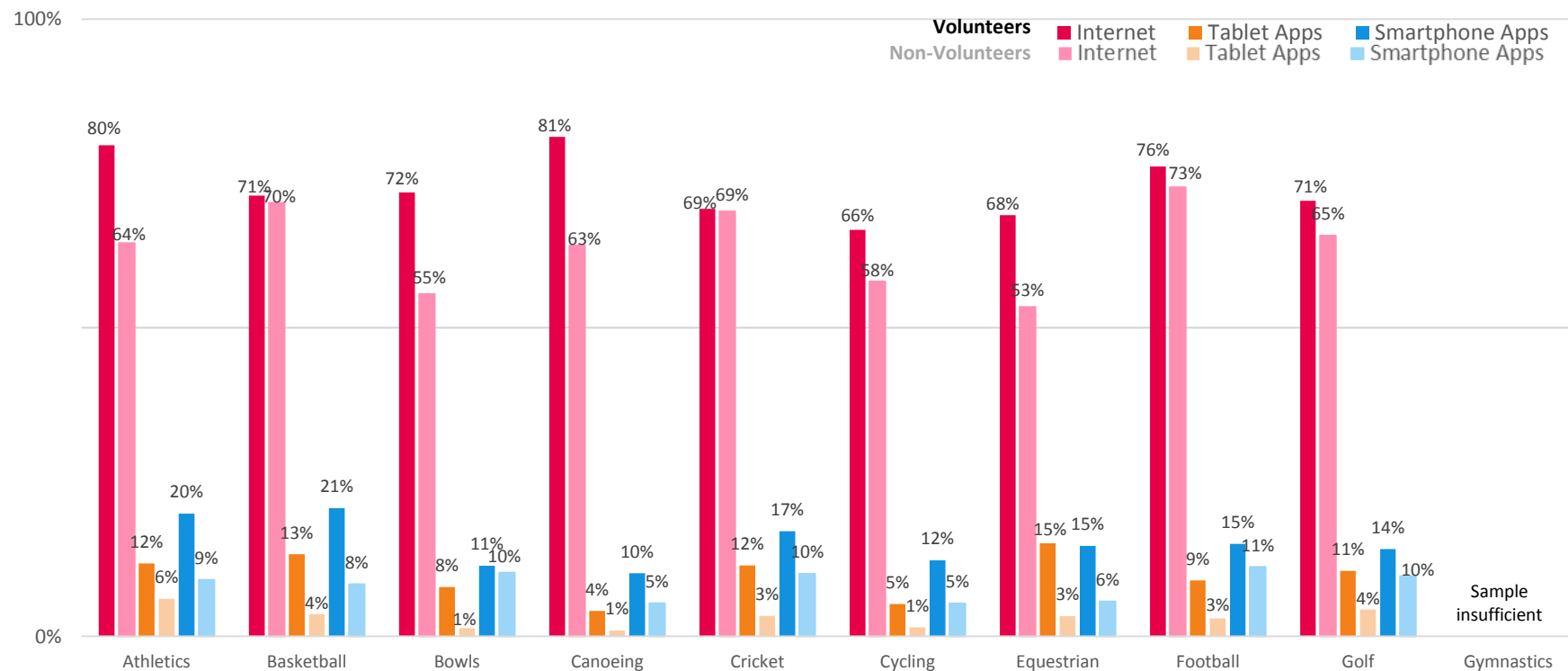
Base: n= 62 - 889



NON-MEMBERS OF SELECTED SPORTS TEND TO USE YOUTUBE MORE THAN MEMBERS OF THOSE SPORTS; THIS COULD THEREFORE BE A KEY CHANNEL FOR ENGAGING WITH THEM AND PROMOTING INCREASED ENGAGEMENT WITH THE SPORT



DIGITAL CONSUMPTION: VOLUNTEERS VS. NON-VOLUNTEERS



OWNERSHIP¹



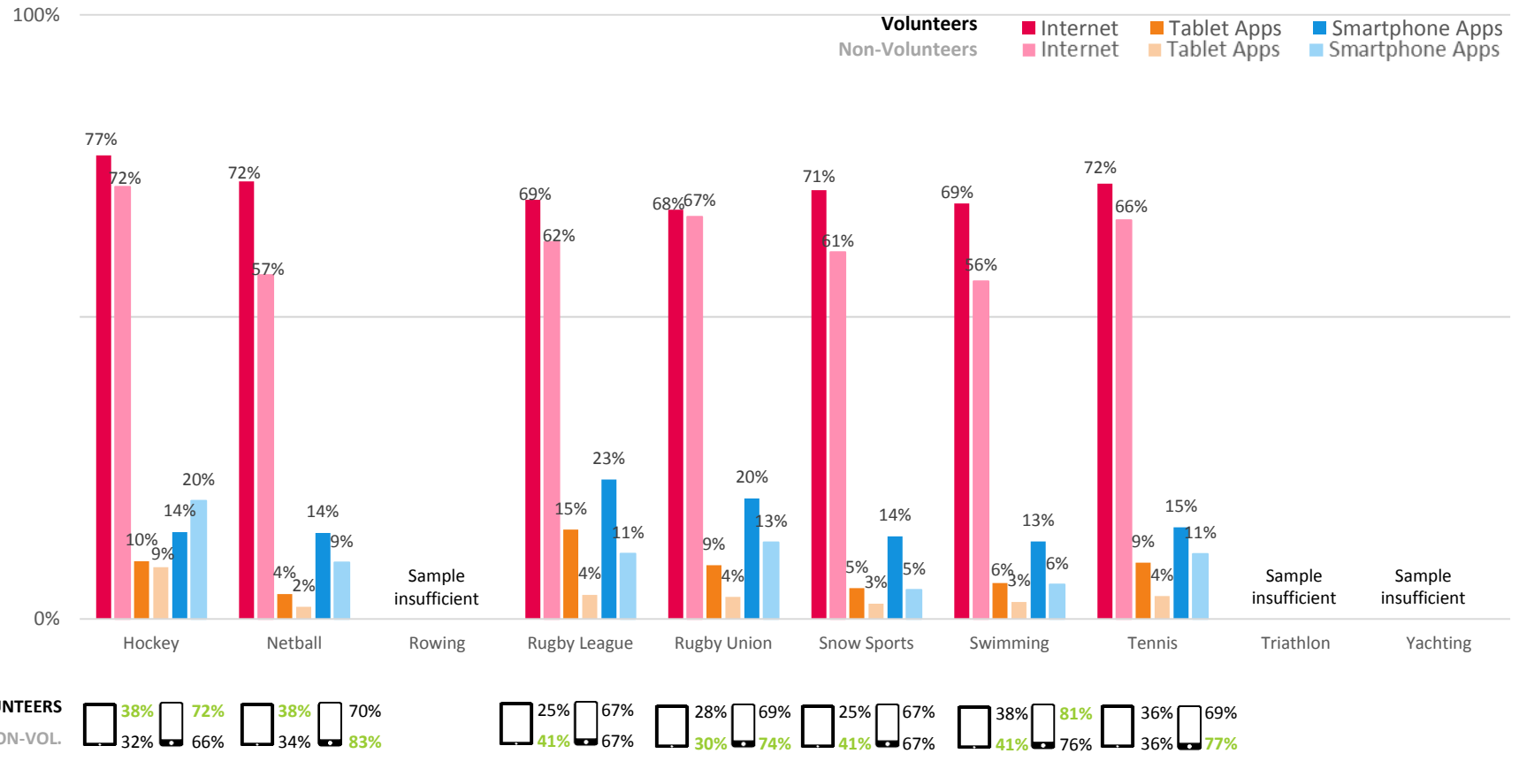
Q. Which of these sources have you used to keep track of these sports/activities in the last week?

1. Green percentage (e.g. 33%) indicates whether volunteers or non-volunteers have the higher ownership of smartphones or tablets

Base: n = 61 - 607



DIGITAL CONSUMPTION: VOLUNTEERS VS. NON-VOLUNTEERS



Q. Which of these sources have you used to keep track of these sports/activities in the last week?

1. Green percentage (e.g. 38%) indicates whether volunteers or non-volunteers have the higher ownership of smartphones or tablets

Base: n = 62 – 1,236



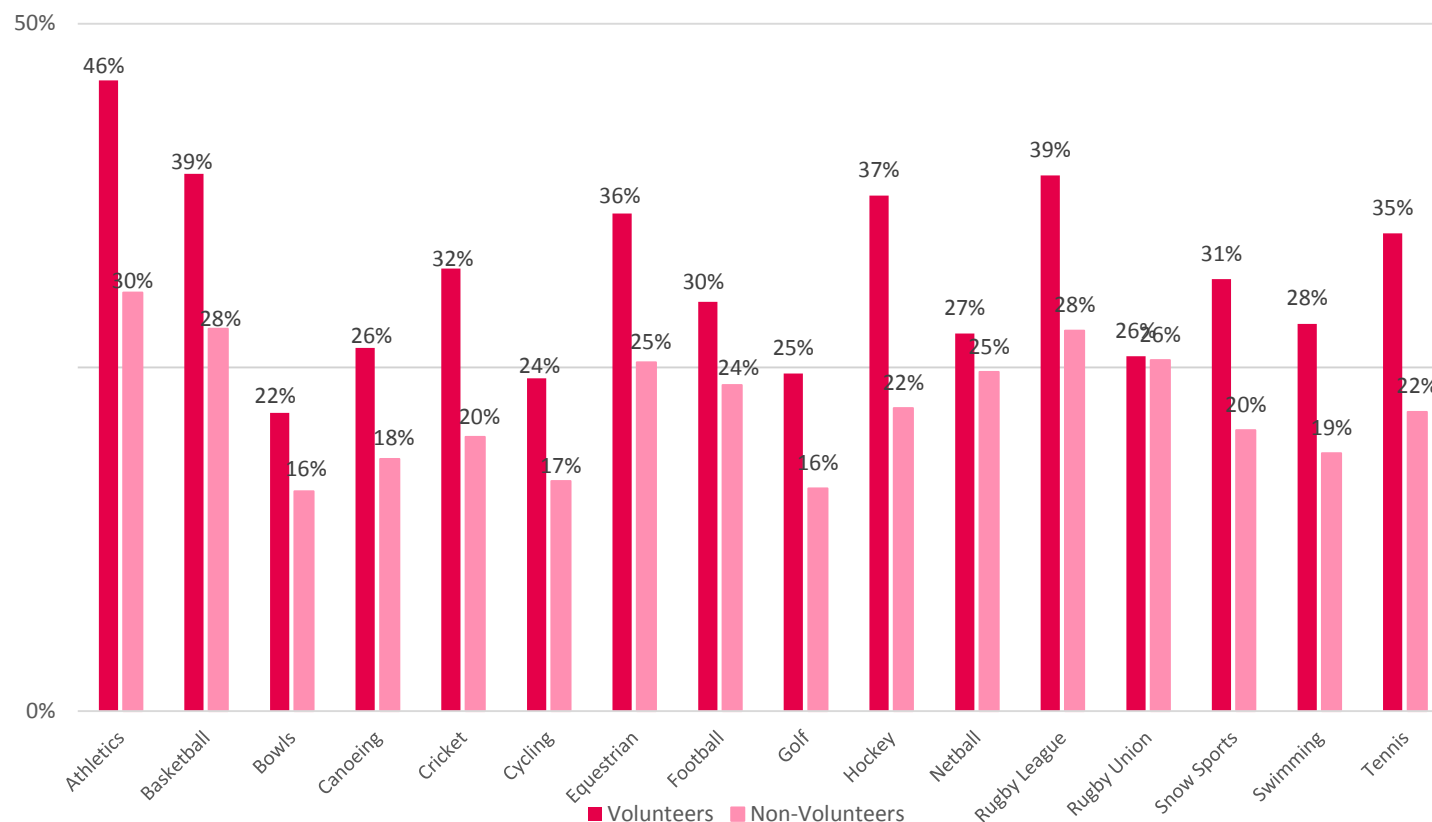
DIGITAL CONSUMPTION IS
HIGHER AMONG
VOLUNTEERS, DESPITE
COMPARABLE LEVELS OF
SMARTPHONE AND
TABLET OWNERSHIP

CONSUMPTION OF SPORT VIA SOCIAL MEDIA CHANNELS IS HIGHER AMONG VOLUNTEERS THAN NON-VOLUNTEERS



AVERAGE SOCIAL MEDIA¹ CONSUMPTION (OF THOSE WHO CONSUME ONLINE)

VOLUNTEERS² VS. NON-VOLUNTEERS



TOP SOCIAL MEDIA CHANNELS – VOLUNTEERS²

1.



2.



3.



Q. Which types of websites have you used to follow these sports/activities in the last week?

1. Average consumption via Facebook, YouTube, Twitter and Instagram.
2. selected sports omitted where sample sizes insufficient.

Base: n= 47 – 763

NB. Please interpret Equestrian and Snow Sports with caution due to lower sample sizes (n=47-48)



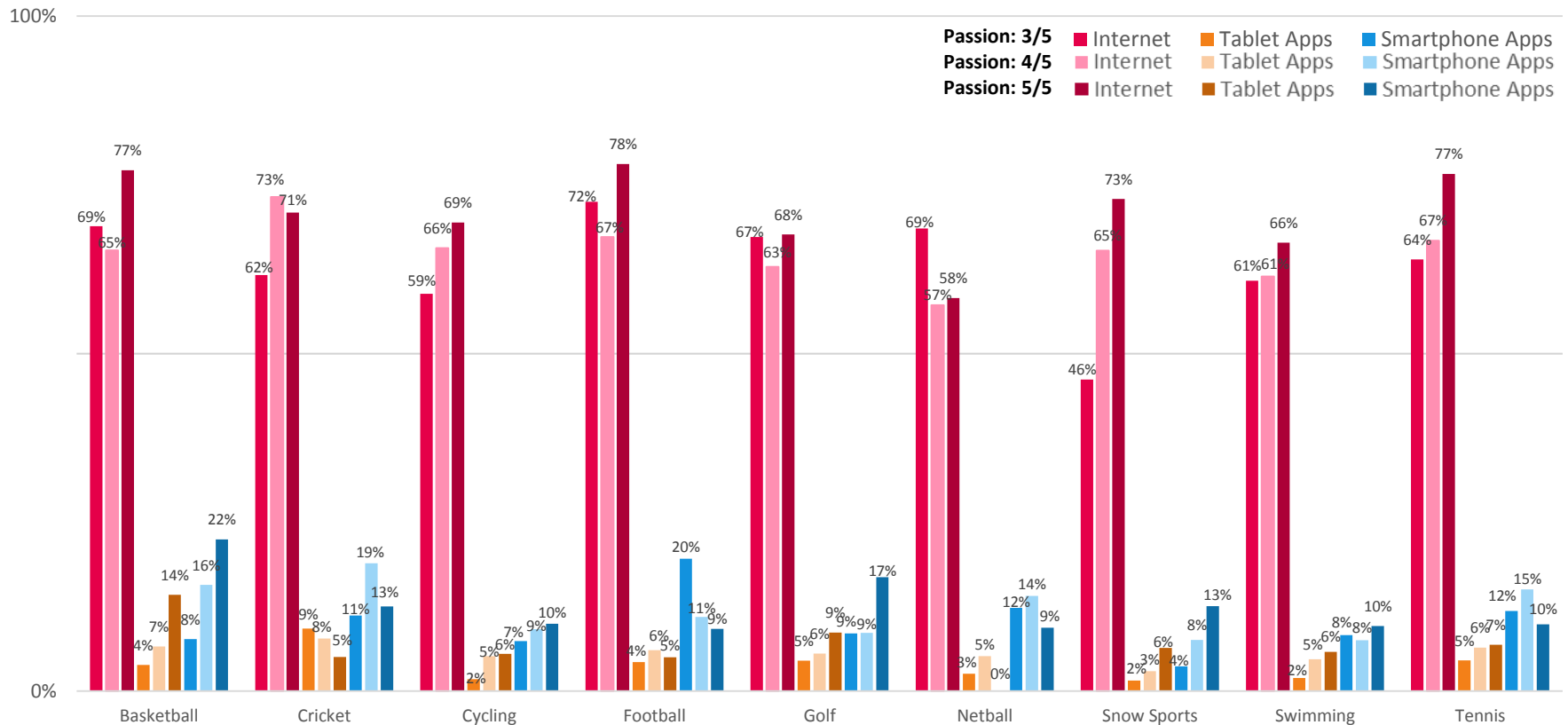
FACEBOOK IS THE PRIMARY
SOCIAL MEDIA CHANNEL
AMONG SPECIFIC SPORT
PARTICIPANTS WHO VOLUNTEER

FOOTBALL PARTICIPANTS WITH LOWER PASSION SCORES ARE TWICE AS LIKELY TO CONSUME SPORT VIA SMARTPHONE APPS THAN THOSE WITH HIGHER PASSION SCORES



DIGITAL CONSUMPTION

PASSIONATE PARTICIPANTS¹



Q. Which of these sources have you used to keep track of these sports/activities in the last week?

1. selected sports omitted where sample sizes insufficient.

Base: n= 54 - 471



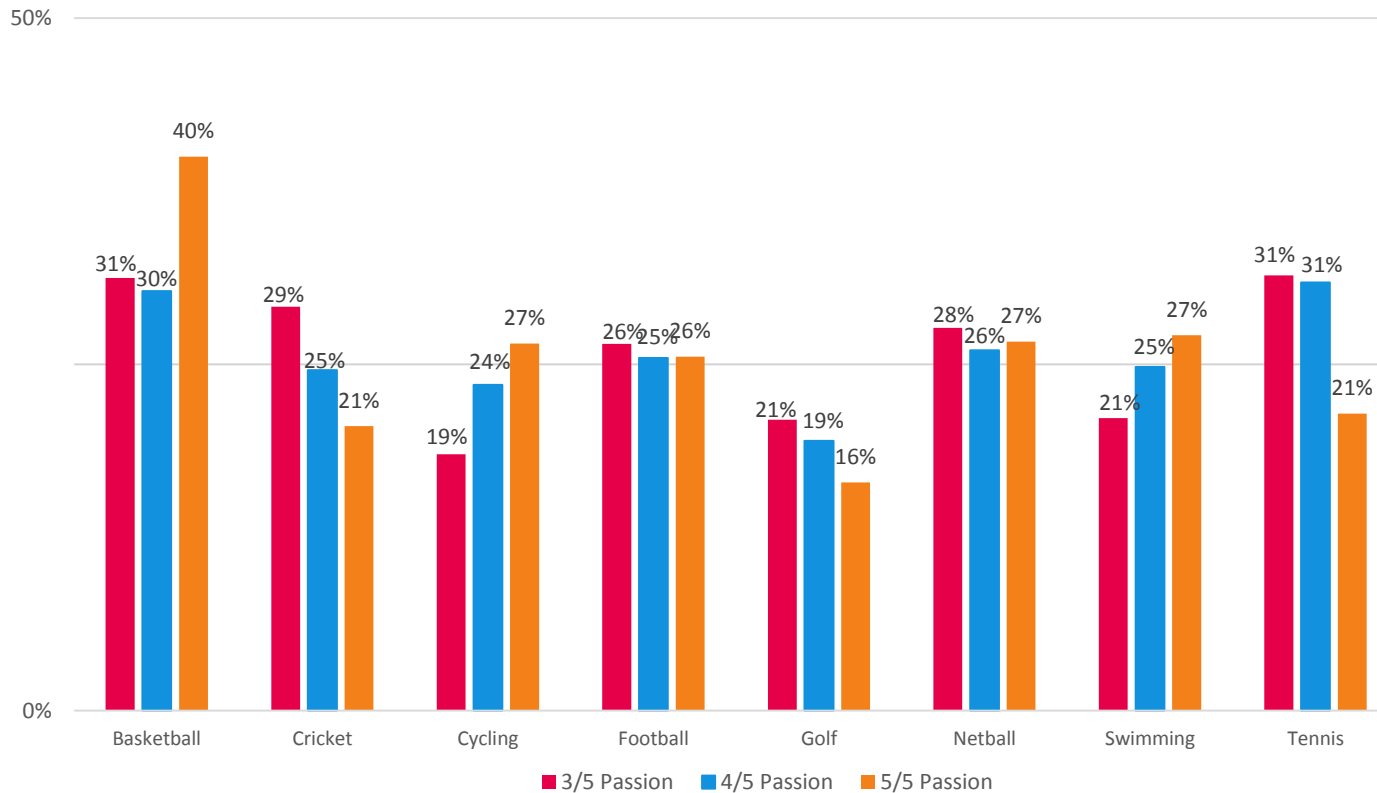
WHEN ASSESSING THE
SELECTED SPORTS, PASSION IS
NOT A CONSISTENT INDICATOR
OF DIGITAL CONSUMPTION OR
SOCIAL MEDIA USAGE

SOCIAL MEDIA USAGE DECREASES AS FANATICISM INCREASES AMONG CRICKET, FOOTBALL, GOLF AND TENNIS PARTICIPANTS



AVERAGE SOCIAL MEDIA¹ CONSUMPTION (OF THOSE WHO CONSUME ONLINE)

PASSIONATE PARTICIPANTS²



TOP SOCIAL MEDIA CHANNELS – FANATICS³

- 1.
- 2.
- 3.

For Basketball, Golf, Swimming and Tennis Participants, YouTube consumption is nearly equal to Facebook consumption

Q. Which types of websites have you used to follow these sports/activities in the last week?

1. Average consumption via Facebook, YouTube, Twitter and Instagram
2. selected sports omitted where sample sizes insufficient.
3. Fanatics are those who rate their passion for a sport as 5 out of 5.

Base: n= 47 – 305

NB. Please interpret Cycling and Netball with caution due to lower sample sizes (n=47)

3 OPPORTUNITY ASSESSMENT



NEW ZEALAND CASE STUDIES





NEW ZEALAND GOLF, IN
PARTNERSHIP WITH BMW, USE
THEIR PROPRIETARY DIGITAL
CHANNEL (THE NZ GOLF
OFFICIAL SITE) TO ENGAGE
WITH AUDIENCES WHO ARE
LESS LIKELY TO USE SOCIAL
MEDIA CHANNELS

BMW GOLF CLUB IMPROVES THE PERFORMANCE OF LOCAL GOLFERS AT EVERY LEVEL

CHALLENGE

Having re-secured the rights of the handicapping website, as well as building a new website and database for golfers, New Zealand Golf were looking to work with a commercial partner to use its extensive golf member data to add value to their personal performance.

APPROACH

NZ Golf's website acts as a central 'hub' for all New Zealand golfers; the site manages all golf handicaps, holds all scoring records, hosts the online tee booking service and allows members to communicate to one another. Working with BMW, NZ Golf amplified its digital offering further, creating The BMW 'Golf Club', a member-only online area that provides in-depth insights of players' performances, performance reports and a leader board.

THE CAMPAIGN



NEW ZEALAND GOLF



NZ Golf's website acts as a central hub for New Zealand golfers, facilitating accessibility of the game



BMW Golf Club provides players with insights into their game to help improve personal performance



Prizes are used as incentives and motivations for players, with the most improved players receiving rewards

RESULTS

- 10,000 members in four months

RELEVANCE

- Demonstrates an organisation collecting relevant data around its participants in order to use it to enhance the experience of its participants
- For those who participate in Golf, it provides a platform to track personal performance/achievement

<http://bit.ly/1MCSerU>



ATHLETICS NEW ZEALAND
MAXIMISES THE USE OF
EXISTING DIGITAL PLATFORMS
TO KEEP PARTICIPANTS UP-
TO-DATE AND ENGAGED
WITH THE SPORT

ATHLETICS NEW ZEALAND ENGAGE THEIR ONLINE COMMUNITY WITH A CONSISTENT AND EFFECTIVE ONLINE PRESENCE

CHALLENGE

Athletics New Zealand had the challenge of providing effective online platforms so its participant base could engage with the sport.

APPROACH

Athletics NZ's online presence is centred around a simple, easy-to-navigate website that has sections for all key areas of the sport; news, events, statistics, clubs, high performance and online store. The website integrates links to Athletics NZ's consistently updated Facebook, Twitter and Instagram accounts, where participants can further engage with the sport. The organisation ensures its social media is consistently updated with Athletics news, results and upcoming events, as well as personal replies/comments on users' posts on their social media pages.

THE CAMPAIGN



ATHLETICS NEW ZEALAND



Comprehensive and easy to navigate website



Website links visitors to Athletics NZ social media accounts



Social Media accounts are consistently updated with engaging content

RESULTS

- Professional and integrated online presence for participants to engage with Athletics NZ
- 6,390 Facebook likes, 358 Twitter followers, 2,151 Instagram followers

RELEVANCE

- Demonstrates the importance of maintaining social media channels with relevant news and content
- Athletics NZ goes out of its way to engage with users of its social media sites, commenting or liking users' content, and responding quickly to any queries
- Although no unique digital platform, the organisation maximises its use of existing channels

<http://bit.ly/1LCtzwN>



THE POWERADE CHALLENGE
CREATED A DIGITAL PLATFORM
THAT TAPPED INTO RUNNERS' KEY
MOTIVATIONS TO PARTICIPATE;
FITNESS, COMPETITION AND
PERSONAL ACHIEVEMENT.

THE POWERADE CHALLENGE TAPPED INTO PARTICIPANTS' KEY MOTIVATIONS TO RUN, SUCH AS FITNESS AND COMPETITION/ACHIEVEMENT

CHALLENGE

Powerade wanted to create an event that encouraged physical activity within the community.

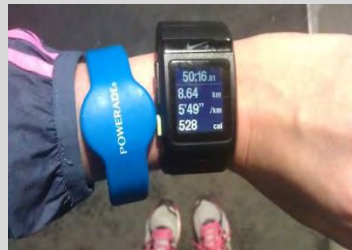
APPROACH

The sports drink brand created 'The Powerade Challenge', a 9 km interactive run along both Auckland's and Wellington's waterfronts. Participants registered online and were sent an electronically chipped wristband; this wristband allowed participants to check in at vending machines along the route. Once completed, participants' times were uploaded onto the Powerade website, allowing them to benchmark their stats against other runners' as well as some of the country's top athletes, such as All Blacks players.

THE CAMPAIGN



POWERADE



Participants registered online to gain electronic wristband



Digital billboards along the Challenge course displayed personal messages encouraging runners to go faster

PLACE	NAME	TIME
0001	BRAD L	39m 27s
0002	HARRY G	39m 34s
0003	SHAWN W	39m 40s
0004	ANDREW S	35m 26s
0005	JACOB H	35m 38s

Once complete, times were uploaded to allow participants to compare times with others

RESULTS

- Over two months, 8,700 runners took the Challenge between Auckland and Wellington
- More than 14,000 runs completed
- Over 123,000kms covered

RELEVANCE

- By understanding people's motivations to run, such as fitness and achievement, Powerade were able to create an innovative platform that encouraged participation
- The brand created a way for individuals to run alone, but then track their achievement against others
- The incorporation of professional athletes' times on the leader board added another fun, competitive element that further encouraged runners to take part in the Challenge

<http://bit.ly/1M78KiM>

INTERNATIONAL CASE STUDIES





BY UNDERSTANDING KEY
BARRIERS TO SPORTS
PARTICIPATION OF GIRLS AND
WOMEN, SPORT ENGLAND WERE
ABLE TO USE ITS DIGITAL
CHANNELS TO DIRECTLY TRY TO
OVERCOME THESE

THIS GIRL CAN UNDERSTANDS KEY BARRIERS TO PARTICIPATION FOR WOMEN AND GIRLS, AND USES DIGITAL CONTENT TO DIRECTLY COUNTER THESE

CHALLENGE

Sport England's research demonstrated that there were 2 million fewer women playing sport regularly when compared with men. Although 13 million women indicated that they would like to participate in more physical activity, the fear of judgement, time, cost and lack of information were all barriers.

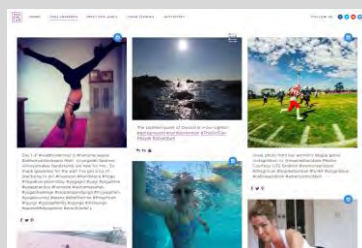
APPROACH

The This Can Girl website includes well-presented, visual content that directly aims to counter fears of being judged. The website is as personable as possible, with individuals sharing their own stories of getting back into sport via blogs, integrated social media posts, and self-made "this girl can" posters (created via a dedicated app). An "Activities" section provides the ability to search for a variety of activities, learn where they can find a class, understand costs and equipment required, as well as learn about the benefits of each exercise. A dedicated YouTube playlist provides introductions to new sports and activities.

THE CAMPAIGN



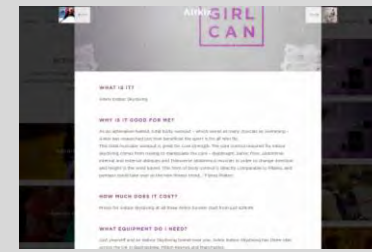
SPORT ENGLAND



Full integration across social media channels allows personal stories to be shared



YouTube videos provide easy introductions to new sports for women and girls



Extensive information is provided about all activities on the website, facilitating participation

RESULTS

- Over 23 million views of the 90 second ad on YouTube and Facebook
- Over a quarter of a million women shared their personal stories of getting active since the campaign launched

RELEVANCE

- Use of a digital platform to target a specific audience group: girls and women
- Understood key barriers to participation and used digital content to try and overcome these
- Integration with other platforms, such as Instagram, allow participants to tell their own personal stories/journeys, inspiring others
- YouTube channel used to provide introductions to different sports and activities

<http://bit.ly/11nr4i9>



BRITISH SWIMMING CREATED A DIGITAL PLATFORM THAT PROVIDED PERSONALISED TRAINING AND EDUCATION FOR AN INDIVIDUAL-BASED SPORT. IN ADDITION, THE APP HELPED TO BUILD UP THE ORGANISATION'S DATABASE OF PARTICIPANTS.

BRITISH SWIMMING LAUNCHED “MYSWIMFIT” PAGE TO ENCOURAGE USERS TO COMPLETE SPECIFIC SWIMMING WORKOUT GOALS

CHALLENGE

British swimming had to find an initiative to achieve its key strategic goal of increasing participation in swimming across Britain.

APPROACH

British Swimming developed the MySwimfit interactive website that acts as an online swimming coach. The site allows members to set swim challenges and create bespoke training programmes and goals. MySwimfit is split into two categories “Coachzone”, which are instructor led sessions, and “Challenges” which allows the user to create their own session.

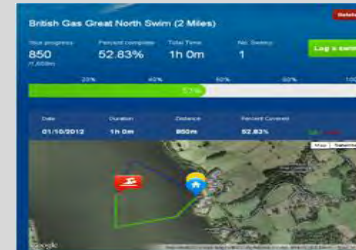
THE CAMPAIGN



BRITISH SWIMMING



Users gain access to coach led sessions and challenges



Fitness goals and milestones can be tracked using google maps



Challenges allow swimmers simulate swimming UK rivers/ coastlines from their pool

RESULTS

- 9,000 new members (equal to total of previous two years pre-SwimFit)
- Website gains 150,000+ page views a month as people log swims and keep track of their progress (10 times the amount of previous traffic)

RELEVANCE

- Given the nature of swimming (i.e. is often participated in by people on their own), the app provides a means of improving personal performance and tracking achievement
- The different ‘zones’ ensure that different motivations to swim are catered for, from fitness to achievement

<http://bit.ly/1UJclE>



BASKETBALL ENGLAND'S STREET
BALL CHAMPION COMPETITION
USED DIGITAL AND SOCIAL
CHANNELS TO PROVIDE
EDUCATION AND PLAYING TIPS FOR
CASUAL BASKETBALL PARTICIPANTS
WHO DID NOT ALWAYS HAVE
SOMEWHERE TO PLAY

BASKETBALL ENGLAND LAUNCHED THE STREET BALL CHAMPION INCENTIVE TO ENGAGE AND SUSTAIN SATELLITE CLUB PARTICIPANTS

CHALLENGE

Basketball England's ("BE") Satellite Club programme allows students in local areas to play basketball in an informal setting at clubs based in secondary schools, colleges and universities. Students don't have to be part of the host club, with the programme having an open door policy. BE wanted to encourage Satellite Club participants to play basketball outside of these club sessions, targeting 14-18 year olds and young adults that fell into the 'uninterested in sports' category.

APPROACH

The Street Ball Champion competition was an extension to Basketball England's Satellite Club programme, allowing participants from across England to take part in 10 different online interactive Basketball challenges. Videos were released every two weeks via Basketball England's official Facebook and Twitter accounts. Participants were encouraged to use these videos to practice their skills, both in their free time, and then during Club sessions.

THE CAMPAIGN



BASKETBALL ENGLAND



A promotional video outlining the competition was posted on Basketball England's Facebook page



Challenges were demonstrated on a short video by the Street Team and posted to social media



Participants with the best skills won the chance to attend the national Street ball to represent their club

RESULTS

- Thanks to initiatives such as Basketball England's Satellite Club, weekly participation in Basketball has increased by 21,800, since October 2011

RELEVANCE

- Use of social media channels to disseminate relevant video content that aimed to motivate personal improvement
- The satellite clubs provide places for participants to play basketball

<http://bit.ly/1ZVZG4r>



“GET ACTIVE LONDON” PROVIDES A CENTRAL HUB FOR ALL THOSE WANTING TO PLAY A SPORT OR ACTIVITY WITHIN THE REGION. THE DIVERSE RANGE OF ACTIVITIES LISTED ONLINE DEMONSTRATE THE ORGANISATION’S RECOGNITION THAT ONE SIZE DOES NOT FIT ALL

“GET ACTIVE LONDON” ACCOMPANIES LONDONERS ON THEIR JOURNEY INTO SPORT

CHALLENGE

Research showed that a key barrier to sports participation was a lack of knowledge.

Get Active London aims to facilitate participants' journey to an active lifestyle by making activities more accessible.

APPROACH

Get Active London is a database of sports clubs and activity providers in the London region; the site has over 13,000 sports and activities listed. Users can easily use the database to search for relevant information about their sport or activity of interest in the GAL activity finder, or upload information about an activity they are offering in the area. The activities listed are extremely broad and appeal to all ages and abilities.

THE CAMPAIGN



GET ACTIVE LONDON



GAL identified lack of access to information as a key barrier to sports participation



Stories about participants are uploaded regularly to the blog



An easy to use Sport & Activity Finder allows interested participants to search for local sports and activities

RESULTS

- Get Active London currently has over 13,000 different sports and activities listed on their Finder

RELEVANCE

- The project makes participation as accessible as possible by ensuring all relevant information is easily available, and found in one central place, thereby countering a key barrier to participation
- The site provides activities for everyone
- Content of everyday participation makes the activities more relatable

<http://bit.ly/1GhhoJ1>



THERE IS FULL INTEGRATION
ACROSS PLAY CRICKET'S DIGITAL
AND SOCIAL CHANNELS, ENSURING
ALL INFORMATION IS ACCESSIBLE
FOR INTERESTED PARTICIPANTS.
EASY-TO-DIGEST INFORMATION, AS
WELL AS KEY STATS AROUND
DIFFERENT TYPES OF CRICKET
PARTICIPANTS, SERVE TO PROMOTE
THE INCLUSIVITY OF THE GAME

PLAY CRICKET PROVIDES ALL THE INFORMATION REQUIRED FOR AN INTERESTED PARTICIPANT TO LEARN ABOUT HOW TO PLAY CRICKET, AND MAKES IT EASY FOR THEM TO START PLAYING

CHALLENGE

Encourage increased participation in Cricket and demonstrate that anyone can play the game, no matter what the age, gender or level of experience.

APPROACH

Play Cricket is an easy-to-navigate website that includes all the information needed for new and existing participants in very accessible formats, including snapshot comparisons/facts of each of the different formats and programmes available for juniors and seniors, as well as intro videos and basic rules for newcomers. To encourage participation by everyone, each section includes stats to demonstrate the inclusivity across the game, e.g. '24% of cricket participants are women and girls'. The site allows interested participants to search for clubs nearby, find out relevant information (contact details, club fees) and in some cases, register for membership with the club directly via the Play Cricket site.

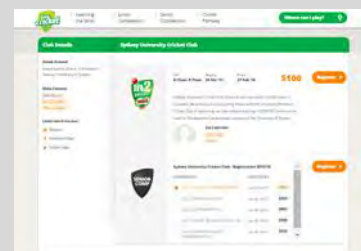
THE CAMPAIGN



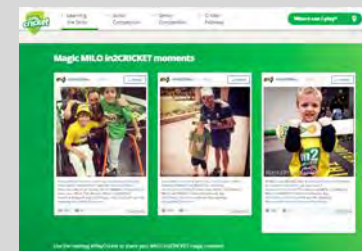
CRICKET AUSTRALIA
PLAY CRICKET



Play Cricket includes intro videos, easy-to-digest programme information and snapshot facts for each format



The club finder has all the information required by an interested participant



Instagram is integrated into the Junior's area, with pictures of junior players meeting their Cricket heroes via the cricket programme.

RESULTS

- Between 2009 and 2014, Cricket Australia has seen an increase of 16% in grassroots participation
- Females now make up 22% of these grassroots players; a decade ago, they only made up 10%

RELEVANCE

- Play Cricket is an example of a really well structured, easy-to-use platform that includes all the relevant information in a digestible and engaging format
- Participation is made as easy as possible through such mechanisms as enabling interested participants to register directly with clubs via the site
- Including stats around non-traditional participants (e.g. women) emphasises the inclusivity of the game and allays any preconceived ideas around who can play

<http://bit.ly/1W4qlfH>



BADMINTON ENGLAND CREATED AN INNOVATIVE PLATFORM TO ENGAGE ITS CASUAL PARTICIPANTS THAT ADDED BOTH A COMPETITIVE AND SOCIAL ELEMENT TO THE GAME, AS WELL AS PROVIDED AN OPPORTUNITY TO FIND NEW PLAYERS TO CHALLENGE ACROSS THE COUNTRY

BADMINTON ENGLAND CREATED BATTLE BADMINTON TO ALLOW PLAYERS TO ENGAGE WITH NEW AND EXISTING OPPONENTS

CHALLENGE

With 1.9 million players participating in Badminton casually, Badminton England wanted to focus on increasing opportunities to play across all levels and abilities by creating an innovative social platform that allowed players to engage with new and existing opponents across towns, cities, regions and nations.

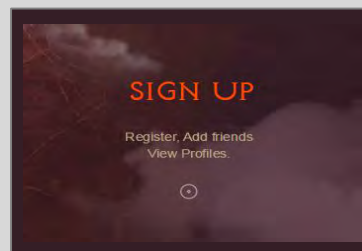
APPROACH

Badminton England created Battle Badminton; an online tool that allows players to find new opponents, track progress at a venue, unlock achievements and rise through the ranks, all in a medieval game platform. Players can issue and accept challenges to 'battle' it out with others across the country, deciding how, when and where they play, and earning points every time they play.

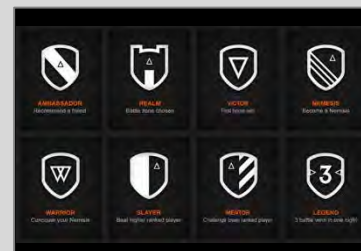
THE CAMPAIGN



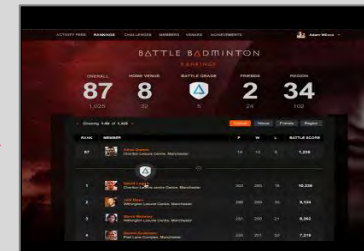
BADMINTON ENGLAND



Players sign up to Battle Badminton online page



Players achieve various missions and achievements by competing against other players



Players track their ranking against other local and international players. Users can also create their own leaderboards among friends, etc.

RESULTS

- Battle Badminton gained 3,500 members within the first few months of the platform being released

RELEVANCE

- Taps into two key motivations to participation – social interaction and competition – by facilitating interactions between players
- Digital platform brings fans and community closer together

<http://bit.ly/1ck9rxg>



NIKE TAPPED INTO THE POWER OF PARTICIPANTS' OWN SOCIAL MEDIA CHANNELS, ADDING AN ELEMENT OF COMPETITION TO THE BUENOS AIRES RACE BOTH IN THE REAL WORLD AND VIRTUALLY, VIA ITS "INTERTWITTER" RACE. IN ADDITION, THE SOCIAL MEDIA APPLICATION PROVIDED NIKE WITH THE OPPORTUNITY TO FURTHER BUILD UP ITS DATABASE OF RUNNERS

NIKE'S "INTERTWITTER" RACE COMBINED THE VIRTUAL WORLD WITH THE REAL ONE TO DETERMINE HOW MANY "FOLLOWERS" A PERSON HAD

CHALLENGE

Nike wanted to find a way to capture data from participants of the 10km Buenos Aires race in an innovative and engaging manner that also encouraged runners to provide personal information.

APPROACH

Nike created a social media application allowing runners to compare their times with those of their Twitter followers. Participants could challenge and banter with their Twitter followers. Race times were posted online at the end of the race; runners could compare their times with those of their Twitter followers/followees to determine their position in the real race on the road, and the virtual race of Twitter followers.

THE CAMPAIGN



NIKE

NOMBRE Y APELLIDO	POSTO GENERAL	TIEMPO REAL	TIEMPO VIRTUAL	TIEMPO OFICIAL
Jorge Merida	1	00:15:01	00:30:00	00:30:09
Dario Hernan Nider	2	00:15:07	00:30:16	00:30:17
Daniel Andres Castro	3	00:15:09	00:30:40	00:30:41
Jorge Cabrera	4	00:15:07	00:30:46	00:30:47
Wilson Ramon Videla	5	00:15:13	00:30:56	00:30:57
Matias Rohl	6	00:15:15	00:30:58	00:30:58
Andres Zunora Sago	7	00:15:19	00:31:00	00:31:00
Mariano Mastromariano	8	00:15:15	00:31:15	00:31:16
Cristian Balardo	9	00:15:27	00:31:17	00:31:18
Diego Elizondo	10	00:15:15	00:31:43	00:31:43

Participants registered with the social media app to compare times with other racers



The app provided a platform for participants to engage with their Twitter followers/followees



Runners could even challenge friends via customised videos, integrated with Google Earth to show their location.

RESULTS

- 1,309 runners registered for the InterTwitter Race
- 163,515 video challenges were sent to their Twitter followers
- The Nike microsite received over 70,000 visits in three weeks
- 3,000 tweets mentioned #InterTwitter

RELEVANCE

- The application provided a further element of competition to the race, giving participants the opportunity to flaunt their social media statuses/standings

<http://bit.ly/1W3hh5w>



VINSPIRED PROVIDES AN EASY-TO-USE PLATFORM FOR ORGANISATIONS TO REGISTER THEIR VOLUNTEERING OPPORTUNITIES; FOR VOLUNTEERS TO SEARCH FOR SUCH OPPORTUNITIES; AND FOR VOLUNTEERS TO BE REWARDED FOR DONATING THEIR TIME

VINSPIRED ALLOWS VOLUNTEERS TO SEARCH FOR OPPORTUNITIES ACROSS ENGLAND, AND BE REWARDED FOR LOGGING VOLUNTEERING HOURS

CHALLENGE

In 2004, the UK Government wanted to understand how they could enhance the diversity, quality and quantity of youth volunteering.

APPROACH

In 2006, vInspired was launched, providing a platform for 14-25 year olds to discover volunteering opportunities across England. Volunteers can search across a diverse range of volunteering opportunities, with organisations being able to register any opportunities they can offer. Volunteers log their volunteering hours online – those who reach a certain number of hours can apply for a vInspired Award.

THE CAMPAIGN



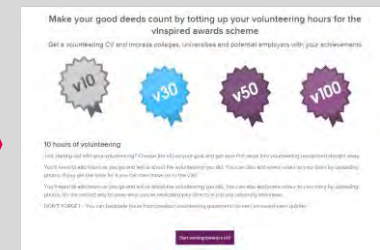
VINSPIRED



Volunteers can easily search different opportunities via vInspired



Organisations can view volunteer's volunteering history and contact them directly



Volunteers can be rewarded when they log a certain number of hours

RESULTS

- Over 164K young people have used vInspired.com
- 1.25 million volunteering opportunities created
- In a year, ~10,000 young people were involved with vInspired's online and offline programmes

RELEVANCE

- Creates a central hub for both volunteers and organisations to connect
- Incentivises and rewards those volunteering
- Easy-to-access information around the organisations offering placements, as well as volunteers' own volunteering history

<http://bit.ly/1xNC8AC>

THREE KEY TRENDS EMERGE FROM NATIONAL AND INTERNATIONAL EXAMPLES THAT UNDERPIN A HEALTHY SOCIAL MEDIA STRATEGY

OPPORTUNITY ASSESSMENT – KEY INSIGHTS

1 INTERACT

- Digital media is most effective when it facilitates some form of interaction, both between the participant and the organisation, as well as between participants themselves.
- A social media presence presents an organisation with the possibility of receiving negative comments, however such comments should be viewed as an opportunity; an opportunity to uncover any potential issues before they escalate, as well as an opportunity to turn someone's opinion around on a public stage. Organisations should therefore not fear negativity, just ensure that they know how to react, e.g. respond in a timely, personal, manner with a solution to the complaint/problem.
- If organisations want social media engagement, they need to commit to it – it's not enough to merely have a presence. Resourcing for such activity therefore needs to be considered, e.g. ensuring someone can update channels regularly; using available stats (e.g. click through/likes) in order to identify, and therefore prioritise, engaged content.

2 ADD VALUE

- Digital media provides additional platforms for engaging with relevant audiences. The platforms are an opportunity to provide relevant, engaging content to participants; not an opportunity to interrupt participants' consumption habits. In order to be successful, any 'brand messages' need to become the content that users are logging into their social media channels to consume. Content needs to actively add value in order to get any cut through.
- If implemented poorly, branded content disseminated by an organisation via social media channels can cause a user to deliberately ignore or block any further content from that organisation. Regaining that user's trust will be very difficult after that.
- Users are increasingly reluctant to share personal information; organisations therefore need to build up trust and incentivise (e.g. through exclusive access, exclusive content, rewards, social engagement) in order to gain valuable information about their audience.

3 UNDERSTAND PARTICIPANTS

- Understanding why participants take part in the sport (fitness, relaxation, etc.), and using this information to develop relevant content/platforms, is critical. E.g. if a sport is social, making it easy for participants to connect to one another; if participants are driven by competition, providing an opportunity to compete against others, or to track personal progress.
- Digital media can be a facilitator when done well, helping to overcome existing barriers. By understanding obstacles to participation, organisations can use their digital channels to help overcome such issues as not having a partner, or lacking the required information, through the content they offer, or the platforms they create. Ensuring that the user's online journey is as straightforward as possible (e.g. participation information easy to find and contains all required information) will enhance such facilitation.

4 KEY INSIGHTS & LEARNINGS



DIGITAL AND SOCIAL MEDIA ARE IMPORTANT CHANNELS FOR ENGAGING WITH PARTICIPANTS

KEY INSIGHTS

Participants use social media and digital channels for sports consumption more than non-participants; as such, digital channels are important for engaging with relevant audiences, and can provide a pathway for increasing participation further. A digital strategy is therefore important across all sports.

Increased digital ownership (i.e. ownership of a smartphone / internet connectivity) does not always translate into increase consumption via apps, demonstrating that it is not enough to rely on a participant having access to a relevant platform – organisations need to provide a reason for participants to actively engage with content via those digital platforms.

Those participants who are more engaged with sport (e.g. a fanatic, a member, a volunteer) are more likely to consume sport via digital and social media channels, once again highlighting the importance of a digital strategy.

A large number of New Zealand sports organisations focus their social media content around their high performance assets. Greater diversification of content could enable participants to both follow their role models within the sport, as well as learn more about how they too can participate. For example, an athlete can share content around how they first got involved in the sport at a grassroots level.

A digital strategy need not be complicated; its priority is to provide relevant, up-to-date information to its existing and potential participants, via accessible channels. All content needs to add value to the users' experience.

INDIVIDUAL ORGANISATIONS NEED TO TAKE RESPONSIBILITY FOR MAINTAINING AND UPDATING THEIR OWN DIGITAL CHANNELS WITH RELEVANT CONTENT

EVALUATION OF SPORTS: SIMILARITIES VS. DIFFERENCES

KEY SIMILARITIES BETWEEN SPORTS

Although there are examples of innovative platforms being created specifically by organisations, these are more ‘nice-to-haves’ than they are essential. Existing platforms can be used successfully, and an organisation’s strategy does not need to be overly complicated, so long as:-

- Content is kept up to date. It is not enough to have a presence across different digital channels if information is not maintained on an ongoing basis.
- Any content or messaging needs to be relevant and engaging. The content must not feel like an ‘interruption’ – it needs to fit into users’ social media consumption seamlessly, ideally becoming the content that users log on to see.

Understanding motivations to participate, as well as barriers to participate, will help organisations focus their strategy and understand what information is relevant or missing.

Facebook is still extremely important – it is consistently the number one social media platform across all sports.

Participants respond well to visual content, as demonstrated via the use of YouTube and Instagram (often in favour of Twitter).

Organisations need to dedicate resource to a digital strategy, such as someone who can allocate a set number of hours a week to maintaining all channels and updating relevant content. Taking time to monitor channels’ basic metrics (e.g. likes, comments, shares) can help identify content that is being most engaged with, and should therefore be prioritised

KEY DIFFERENCES BETWEEN SPORT CATEGORIES

For individual-based activities, such as **Individual Sports, Individual Activities, Fitness Activities and Outdoor Activities**, case studies show the benefit of being able to use digital channels to improve personal performance and track achievement.

For **Social Activities and Team Sports**, digital can play the role of the ‘facilitator’, putting like-minded people in contact with one another by providing a central hub of information and contacts to propel participation.

For sports with traditionally older fanatics (e.g. golf, cricket) there is less engagement with social media; as such other platforms should be prioritised, e.g. a sport’s/activity’s website, general news websites, etc.

In contrast, **Motorsports** participants are highly engaged with social media channels, despite having a lower digital ownership overall.

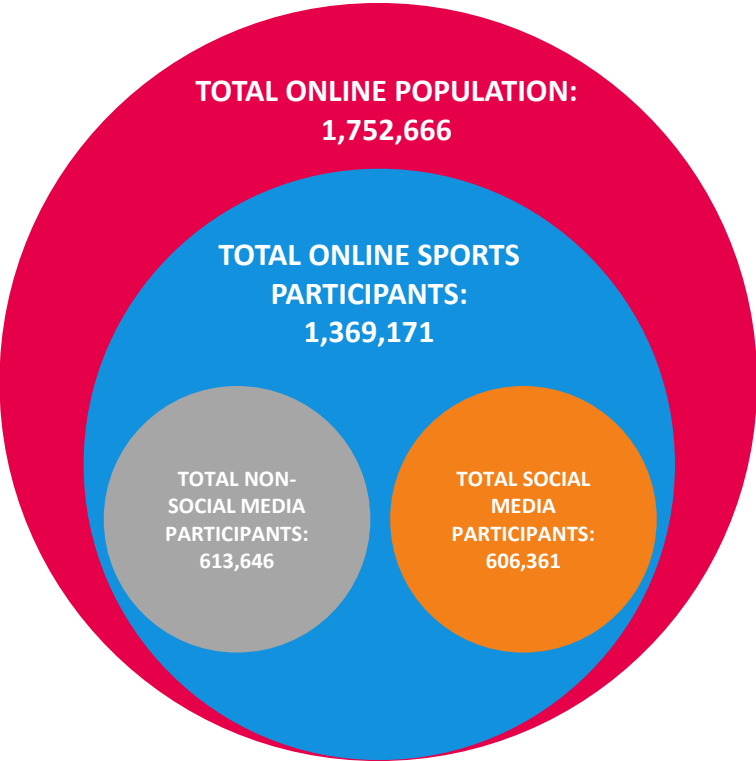
ALTHOUGH THERE ARE KEY LEARNINGS THAT CAN BE APPLIED ACROSS NEW ZEALAND NSOS, FUNDAMENTAL DIFFERENCES REQUIRE ORGANISATIONS TO TAKE INDIVIDUAL RESPONSIBILITY FOR THEIR DIGITAL STRATEGIES

5 CONSUMER MARKET SIZING



~80% OF THE TOTAL ONLINE POPULATION ARE SPORTS PARTICIPANTS: OF THIS SEGMENT, HALF CONSUME SPORT VIA SOCIAL MEDIA

MARKET SIZING – ONLINE MARKET



TOTAL ONLINE POPULATION

INTERNET			APPS	
1,012,353	498,144	271,395	170,441	85,406

TOTAL ONLINE SPORTS PARTICIPANTS

INTERNET			APPS	
827,804	417,980	222,243	145,457	70,180

TOTAL SOCIAL MEDIA PARTICIPANTS

SOCIAL MEDIA			
475,453	277,359	86,387	77,631

Gemba

CONTACTS

AUCKLAND OFFICE

Suite 3, Level 1
27 Gillies Avenue
Newmarket 1023

T +64 9 948 4179

.....

MELBOURNE OFFICE

1/175 Sturt Street
Southbank VIC 3006

T +61 3 9526 5700

.....

SYDNEY OFFICE

Level 3, 4-14 Foster Street
Surry Hills NSW 2010

T +61 2 8020 6550

.....

SHANGHAI OFFICE

1518 Xikang Road,
Bldg 13, Suite 1205
Shanghai 200060 China

T T +86 137 0185 1452

E info@thegembagroup.com

www.thegembagroup.com

