Project Title: What do paddlers value?
And as a sporting organisation are we able to provide products/services that represent value

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1.0 Introduction

Based on Repucom report the Australian Sporting Landscape Part 3 – 2014 The consumer perspective – Canoeing Paddlesports and Kayaking. Page 22 of the report shows 2 % of the population are active participants in Canoeing, Paddlesports and Kayaking this translates to approximately 150,000 active paddlers. Our current membership sits under 2000 which is 1.3 %. In terms of a conversion funnel this represents a very small conversion. This report has sparked interest amongst both the state and national sporting bodies about creating a service value offering that would attract the broader paddling participants.

In order to attract the broader paddling participants we firstly need to understand who they are in terms of market segmentation, understand their motivations for participation and the goods and services they value. This needs to be considered within the context of a decrease in traditional membership structure and expected trends within the sporting landscape especially the technology aspects.

2.0 Literature Review

2.1 Background

The purpose of the literature review is to better understand participation in sport with a view to applying this to paddling. The first article considers trends in sport particularly around the technology aspects, the second article considers participation within the sport commitment model and relates to the sport of tennis. The third article consider recreational sport participation scale – this article explores the motivations for participation, this article in particular highlights not just a range of product and services to suit specific motivations but also the delivery of multiple marketing messages to illicit responses from differing motivational segments for the same products and services.

2.2 Article 1 – Sport Business in the Next Decade: A general overview of expected trends

The article considers the next decade of sporting trends – expected to be realised in 2011. This article based on secondary data and on first inspection appears in 2018 to be quite dated although it is still relevant. This article is particularly focused on professional sports in the US and the sport industry growth, consistent with the overall economy. The authors ask the question “What will it take to remain viable in the Next Decade” based a general decline in the economy and money in sport, increased competition, heavy debt and poor relations with consumers. The next decade will require some creative strategies in the areas of new technology, exploiting events, financing, tapping new markets, improving targeting efforts as well as reconnecting with traditional consumers, cutting budgets and increasing synergy. The strategies most suited to the future of paddling are the creative use of technology especially in the area of feature rich social applications, exploiting events including improved targeting, tapping new markets especially those identified as active participants who are not connected with the sporting organisation and increasing commitment from those who participate infrequently. The other strategies relevant to paddling that will not be considered in this project are cutting budgets particularly those items not creating value and increasing synergy.

2.3 Article 2 A Sport Commitment Model Perspective on Adult Tennis Players' Participation Frequency and Purchase Intention

The context was based on general participation rates overall rising whilst tennis participation is falling the example highlighted in the article demonstrates participation drops in Australian Tennis from 1.02million in 2000 to 768,000 in 2006. This article reviews secondary data as well as a survey of 537 adult recreational tennis players. The five direct predictors (Sport Commitment Model) that can increase or decrease sport commitment: sport enjoyment, involvement opportunities, personal investments, social constraints and involvement alternatives. The survey was developed considering the following areas: demographic, sports commitment model, participation frequency and purchase intentions. A key practical implication of focusing marketing efforts on increased commitment will also serve to retain customers. The article also reported that it cost six times more to attract a new customer than to retain an existing customer. This article extends the sport commitment model and found that sport commitment significantly influenced both participation frequency and consumer behaviour. This article forms the foundations of the survey with the addition of some technology questions to address the strategies in article 1.

2.4 Article 3 The recreational sport participation scale: development, testing and practical application

This article considers the motivations of sport participants in the Recreational Sport Participation Scale (RSPS). The first method applied is a literary review then interviews to test the proposed model. Each factor within the scale has specific positively correlated keywords. The correlated keywords for each factor are:
Challenge – difficult; skills; training; tough; experience;
Victory – winning; game; competitive; pride;
Sensory – excitement; exciting; stimulating;
Workout – exercise; physical; energizing; involved.
Social – entertaining; friendship; enjoyable
As recommended in the article the use of a five point Likert Scale response will be added to the survey for each of the factors to better understand paddling participant motivations. The key learning from this article is the targeting of events through

segmented marketing messages and the development of products and services to suit specific market segments. The article also provides recommendations on better connecting with each segment in the market an example for the challenge factor would be to add significant hurdles as part of the experience. Further recommendations will be included in the discussion area of the project.

2.5 Overview

Based on Repucom report the Australian Sporting Landscape Part 3 – 2014 The consumer perspective – Canoeing Paddle sports and Kayaking. Page 22 of the report shows 2 % of the population are active participants in Canoeing, Paddle sports and Kayaking this translates to approximately 150,000 active paddlers in NSW.
Our current membership sits under 2000 which is a conversion rate of 1.3 %. In terms of a conversion funnel this represents a very small conversion.

In order to attract the broader paddling participants we firstly need to understand who they are in terms of market segmentation, understand their motivations for participation and the goods and services they value. This needs to be considered within the context of a decrease in traditional membership structure and expected trends within the sporting landscape especially the technology aspects.

3.0 Methodology

The survey was constructed using google forms and distributed electronically through Facebook groups, the Paddle NSW subscriber list which includes both member and non members as well as meet up groups. In addition, it was directed to peers and asked if once they had completed it they could direct it to their paddling peers.

The advantages of using an online survey is a greater reach, its economical, faster and more confidential (Couper & Coutts, 2006)

The availability of the survey only being in an electronic format could limit survey responses from specific demographics, that do not use technology and the internet. The distribution of the survey through primarily Facebook, could increase results in the technology questions for that area. The distribution to the Paddle NSW subscriber list could skew the results towards paddlers being members of a sporting organisation although close to 6000 emails were sent and the current membership is less than 2000.

The survey was broken down in to the following sections:

- Demographic questions
- Sports Commitment Model (Casper, Gray and Stellino)
- Technology Trends (Mahony and Howard)
- Recreational Sport Participation Scale (Mueller)

In terms of the quantity of survey responses, the number of responses collected was 504 from 469,800 active paddlers in Australia (23,490, 000 population ABS x 2% 2014

Repucom Study P21). The tennis survey conducted by Casper, Gray and Stellino had 537 responses for a representative 768,000 active participants.

The survey participants were 504 paddlers (303 male, 193 female and 8 other) with a mean age of 53.05 years. The demographic questions included a question around paddle sports to ensure the survey covered a representative population across the paddling community, as well as gaining an understanding that different paddle sports have differing motivations for participation.

To validate the sample as being representative, the report has cross referenced PaddleNSW and Repucom Participation age demographics. The age brackets are slightly different in each report referenced.

While data collected suggests 79% of paddlers participate in other sports and have identified the sports participated, many participants identified more than 1 sport. The following questions related to frequency of participation in each season for only 1 other sport rather than each other sport.

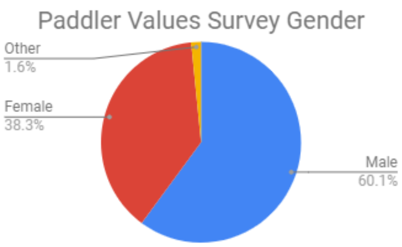
4.0 Results

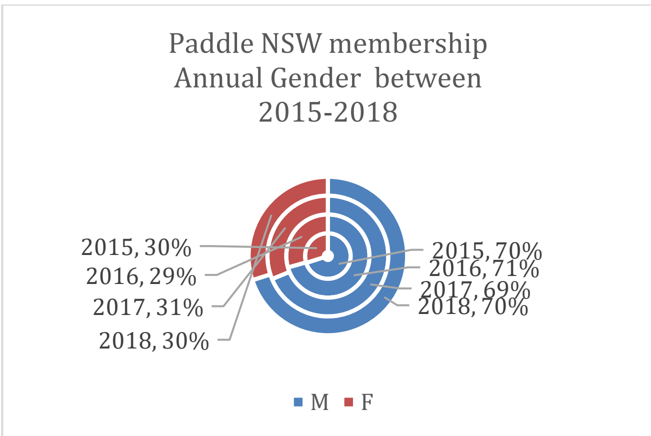
In order to maximise the value of the report, this report considers both the simple as well as multidimensional analysis of the survey responses with the simple results considered initially with more complex iterations considered later in the report.

The survey conducted did not limit the region for survey responses, although the responses outside of Australia are consistent with the Australian respondents. 78% responses were from respondents living in Australia.

4.1 Age and Gender Demographics

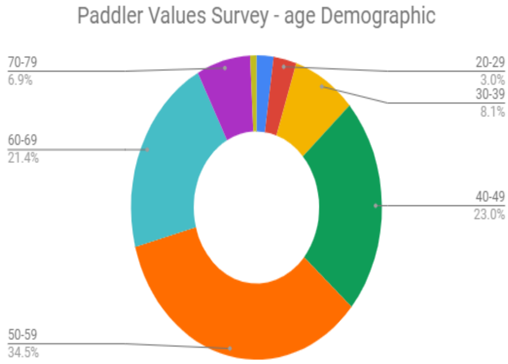
The gender demographic in the survey 303 male, 193 female, 8 other.

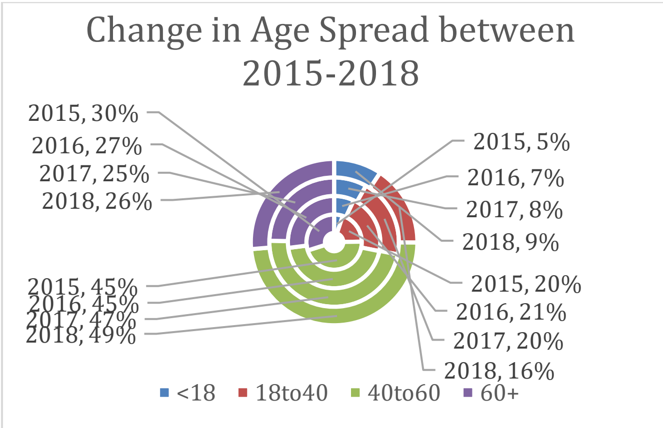




The survey shows almost 10% higher female representation than Paddle NSW membership over the last 4 years.

Re-evaluating the age diversity from the Paddler Values Survey grouping to comparable Paddle NSW membership, shows Ages 10-19 2.2%, 20-40 11.1%, 40-60 57.50% and 60+ 29.1%. This shows the younger Paddle NSW demographics under 40 are under represented in comparison to Paddle NSW membership as the older demographics show a slightly higher representation. The Repucom report shows an even spread for active participation across each of the age demographics with 1-3% of the Australian population.





Of the 503 responses for “Are you a member of a paddling association?” 21.3% answered that they were not members.

The demographic for non members is a little different to the overall results, the were 54 non member males and 53 non member females and 1 other.

4.2 Paddle Sport Demographics

Each paddle sport has its own specific demographic which attracts different participants with different motivations.

					Gender Spread		Motivations				
Paddle sports	respondents	non members	% non member	avg age	gender %m	gender %f	Challenge	Victory/ Winning	Fitness	Sensory	Social
Recreational	378	92	24.34%	54.40	58.33%	41.67%	3.40	2.29	4.15	4.17	3.52
Marathon	230	14	6.09%	52.74	68.86%	31.14%	4.22	3.20	4.51	3.79	3.61
Sea Kayaking	147	35	23.81%	55.95	61.38%	38.62%	3.71	2.29	4.60	4.47	3.57
Ocean Paddling	108	12	11.11%	48.80	78.70%	21.30%	4.22	3.31	4.55	3.90	3.67
Sprint	60	1	1.67%	47.35	61.67%	38.33%	4.33	3.88	4.53	3.77	3.68
SUP	50	15	30.00%	49.00	57.14%	42.86%	3.76	2.74	4.18	4.06	3.34
White water	46	6	13.04%	48.48	66.67%	33.33%	3.87	2.37	3.96	4.65	3.74
Outrigging	38	0	0.00%	52.11	52.63%	47.37%	4.21	3.37	4.53	3.89	3.84
Dragon Boating	25	0	0.00%	50.20	56.00%	44.00%	4.12	3.72	4.60	3.60	3.80

Canoe Slalom	20	0	0.00%	41.00	85.00%	15.00%	4.10	3.60	4.35	4.25	3.65
Rafting	13	2	15.38%	53.46	50.00%	50.00%	2.92	2.08	3.77	4.38	3.77
Canoe Polo	9	0	0.00%	46.11	88.89%	11.11%	3.78	3.33	4.33	4.44	4.22
Canoe Freestyle	8	1	12.50%	46.25	62.50%	37.50%	3.63	2.88	4.38	4.88	4.50

From the data analysis some common themes became evident and whilst we have no data at the sporting organisation level that supports whether the balance of the number of respondents is consistent with membership for each paddle sport.

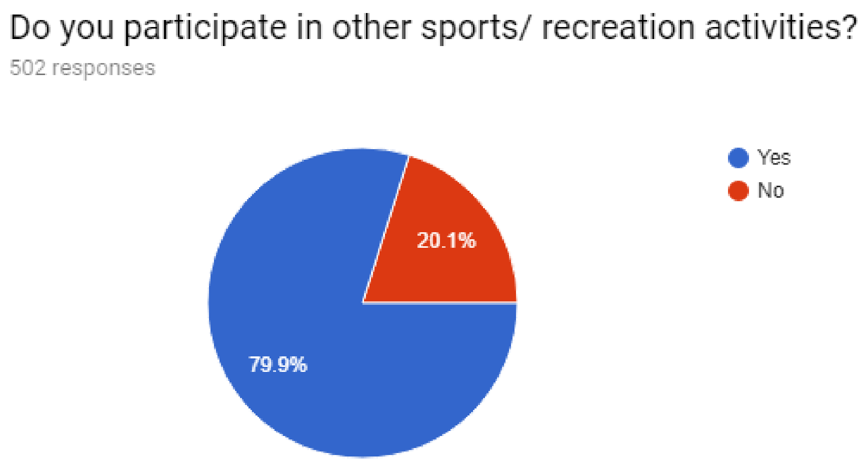
Most of the paddle sports showed high (>4) motivations towards fitness. The paddle sports that showed the highest motivations towards challenge also had the lower non member %. This could be driven by most of the events offer discounts for members. This is supported below when considering the value of membership.

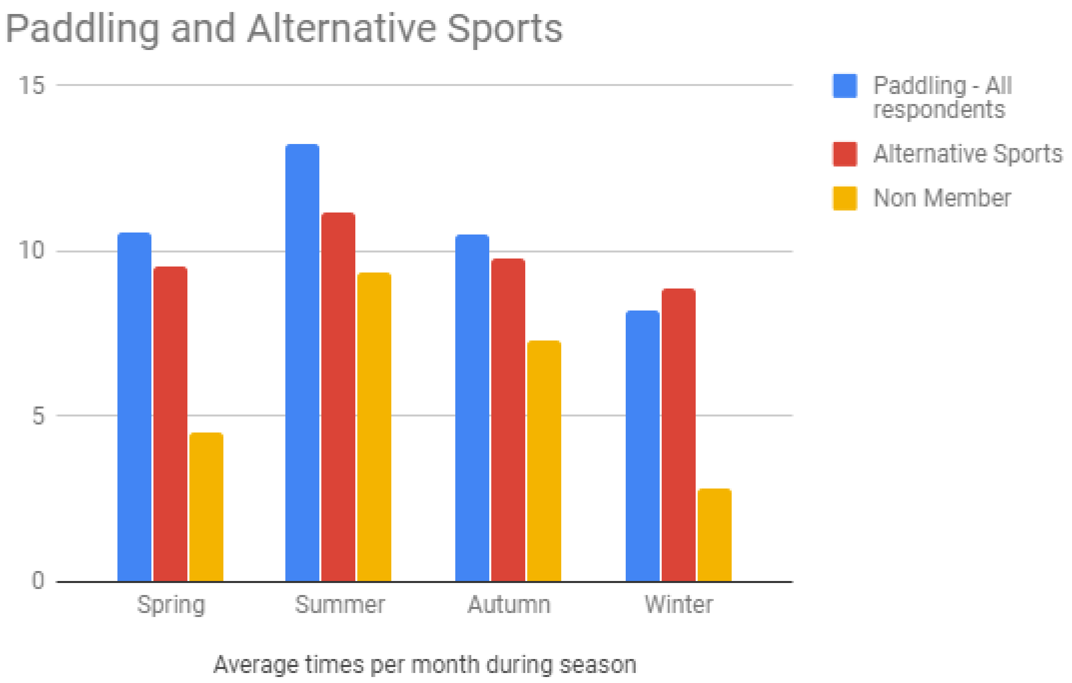
The paddle sports with the highest non member % also showed a strong correlation with sensory experiences being an important motivator. This presents a possible opportunity to provide events/experiences with more sensory elements, and/or to provide alternative marketing messages. We also should consider digital offerings that appeal to this motivation eg video

The paddle sports that require more physical resources tend to have higher percentage of members for example Dragon Boating requires 20 paddlers in the boat and the boat is usually a sporting organisation resource rather than an individual resource, outrigging is slightly different in that the boats can comprise 1, 2, 4 or 6 paddlers, team boats of 4 or 6 would generally be a sporting organisation rather than an individual resource. Canoe slalom generally requires access to specific sporting organisation venue. Canoe Polo is also a team sport where teams of 5-7 play against each other often in a pool setting.

4.3 Alternative Sports

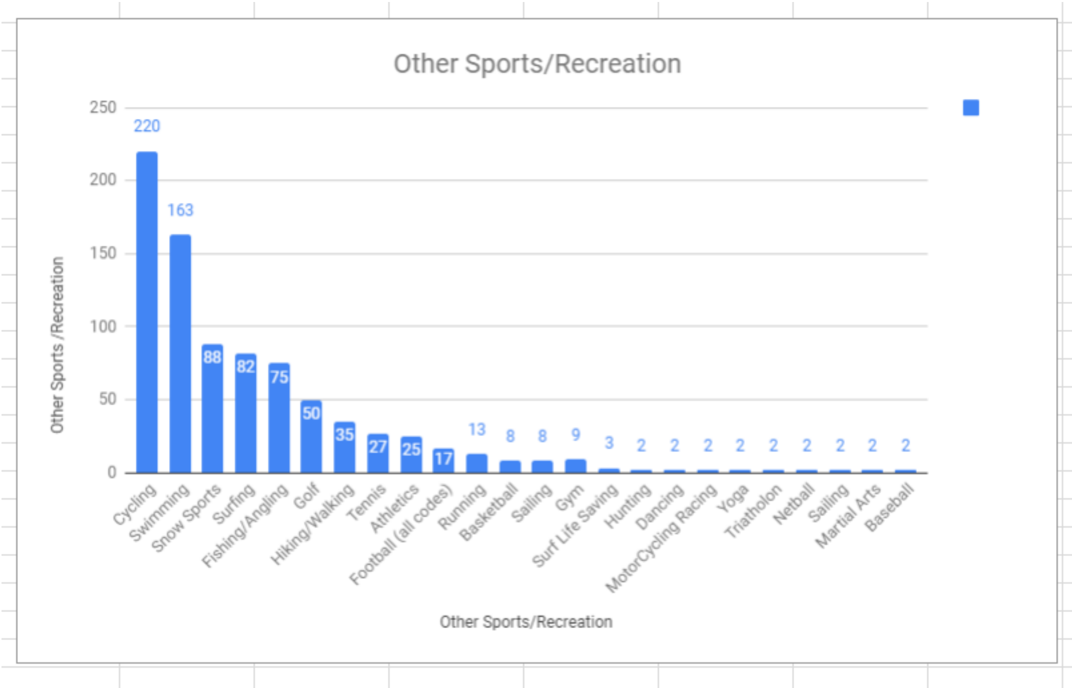
As part of the Sports commitment model, the survey considers the frequency of participation during each season. In the area of Alternative sports, the survey considers the number of respondents participating in alternative sports, which sports are participated in and the frequency of participation in the alternative sport.





The Participation frequency between all paddlers and non members is not only lower but shows a significant difference in winter.

This is consistent with the sports commitment model where enjoyment translates to increased participation as well as purchase intention.



Sports with less than 2 responses have been omitted from the chart.

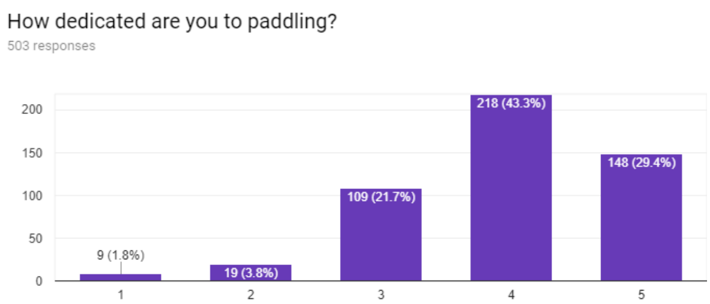
The similarities between paddling and the most popular alternative sports are that they are primarily outdoor sports and are generally individual sports.

Opportunities for the sporting organisation, taking into consideration the alternative sports identified, include partnering with the alternative sport associations to offer regular, as well as taster events (shorter distances) such as Adventurethon which includes a range of distances in Paddling, Mountain biking and trail running.

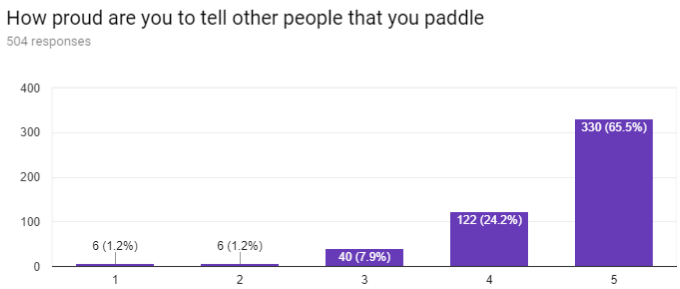
The following questions of “average length of paddling”, “how dedicated you are” and “proud to tell others people that you paddle” indicates a high level of enjoyment in the sport.

The average length of time paddling of respondents is 16 years, the range is between less than 1 year and 66 years.

The average number of boats owned by respondents is: 7.9 boats per respondent.



The average score for this question is 3.94



The average score for this question is 4.516.

The combined average score relating to the enjoyment aspect of the sports commitment model is 4.22

4.4 Personal Investment

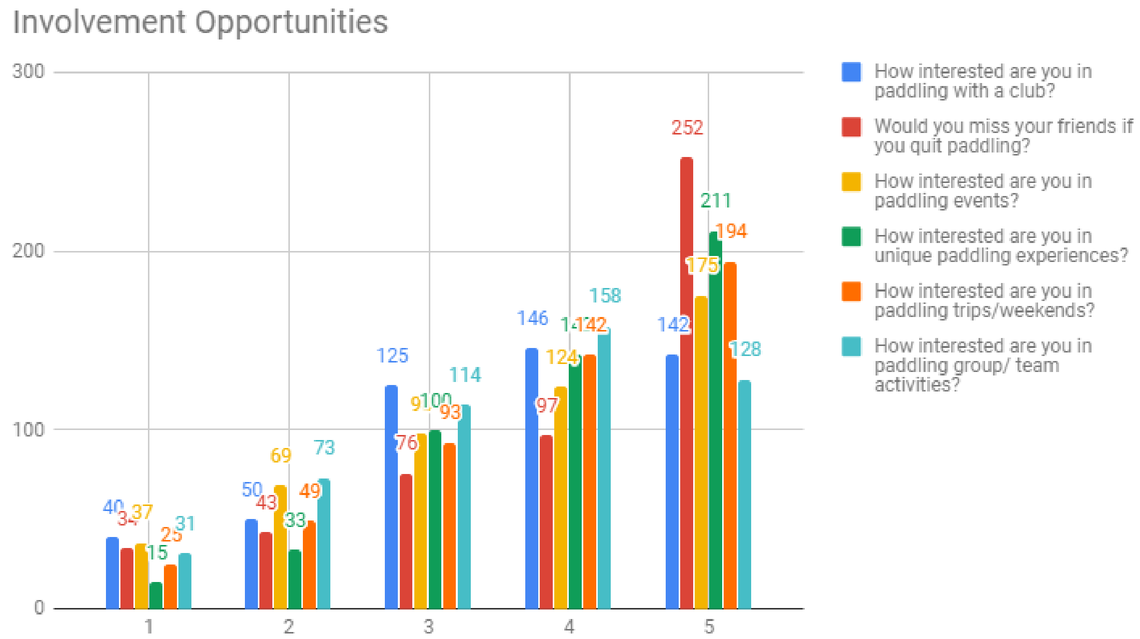
The survey considers personal investment as a predictor of commitment and the relationship to purchase intention as shown in the table below:

Spend - Purchase Intentions	
Approximately how much would you spend annually on boats/paddle craft?	$1,697.85
Approximately how much would you spend annually on other products? eg accessories, paddles	$445.24
Approximately how much would you spend annually on services? eg tours, coaching	$655.03
Approximately how much would you spend annually on memberships and subscriptions?	$199.64
Approximately how much would you spend annually on race and event fees?	$288.98
Total	$3,286.74

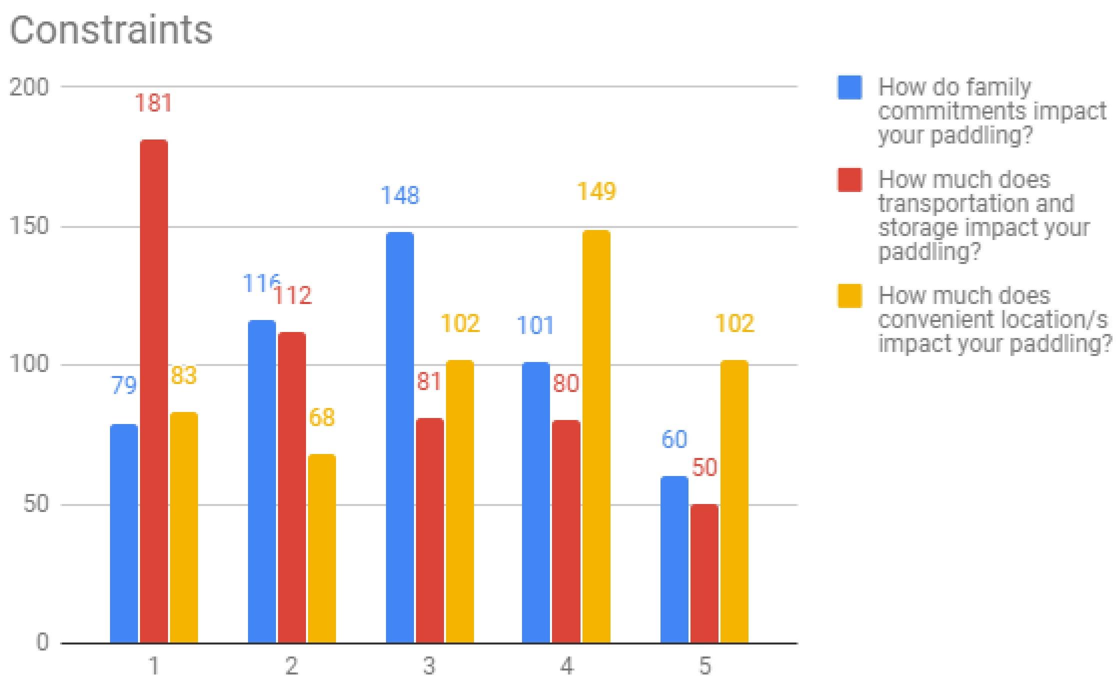
The information in this section should be used to further develop strategies for identifying opportunities for partnerships as well as possible product/service packaging opportunities

4.5 Involvement Opportunities, Constraints & Social Support

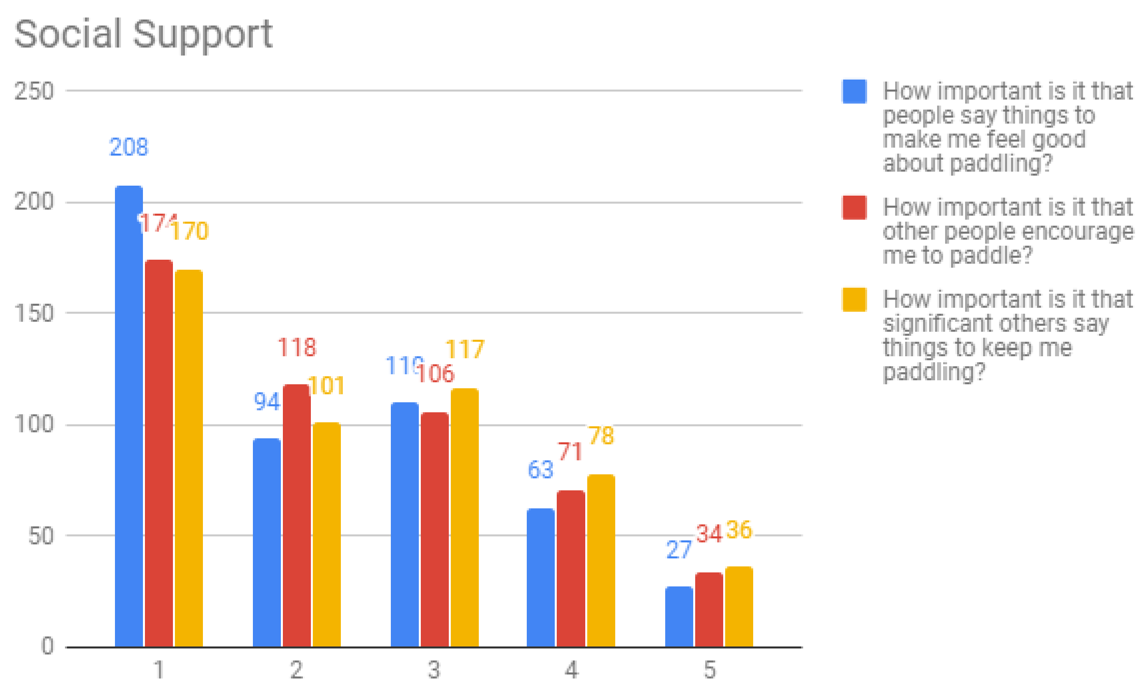
Each of the following questions was answered using a likert scale with 1 being least important and 5 being most important.



The most important of the involvement opportunities with an average score of 4 is unique paddling experiences, closely followed by missing friends(3.97) and paddling trips/weekends (3.85) with the average of each question over 3.5.



Constraints appear to be less important to paddlers than involvement opportunities with the average for each of the constraints questions 2.84 with the most important constraint convenient locations with an average score of 3.23. The importance of constraints should be considered carefully when marketing to slightly different demographics. Eg the constraints of transportation and storage may be larger barrier when considering a youth program.



The average score for Social support was 2.32, and does not appear to be valued highly by paddlers.

4.6 Technology

Each of the technology questions identified a clear leader as well as a very clear second. The questions in this area were:

Do you use technology to connect with paddlers? The most popular was Facebook (374) and then WhatsApp (70)

Do you use technology to organise paddling activities? Again the most clearly popular is Facebook (276) closely followed by WhatsApp (66) and Email (65)

Do you use technology to organise places to paddle? Google (316) is clearly the leader in this space, with the Waterwaysguide.org.au (86)

Do you use technology to assist your paddling performance? The clear leader in this area is Garmin (246) followed by Strava(43)

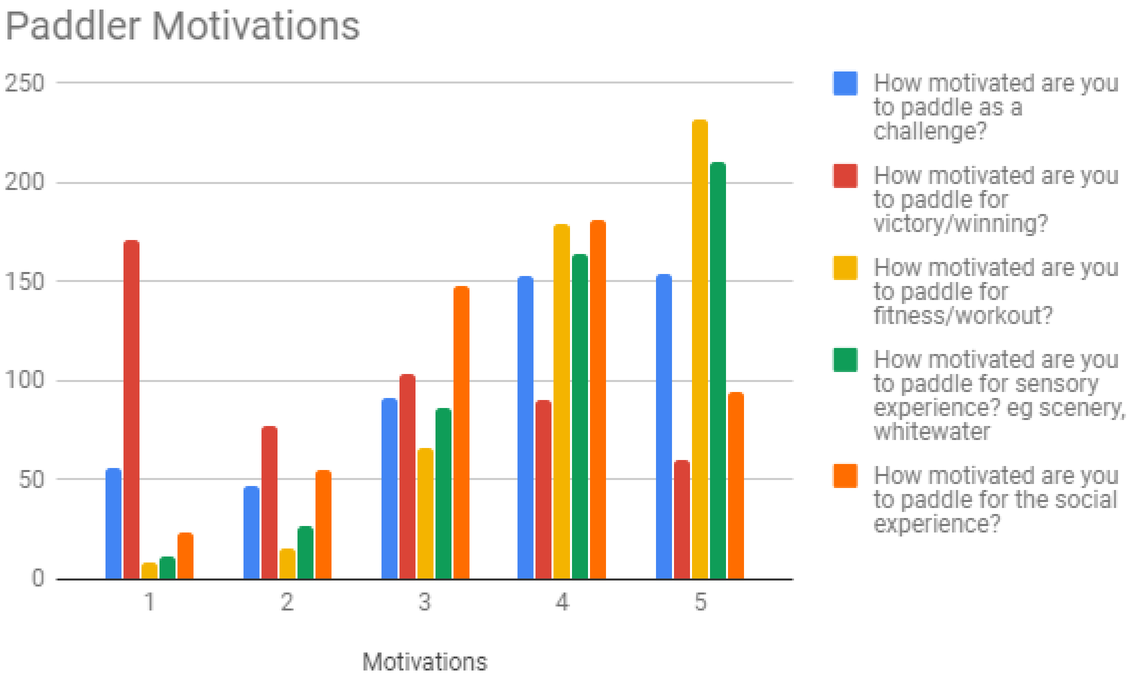
Do you use technology for safety information/advice? Again the clear leader is Google(210) followed by the waterwaysguide.org.au(95)

Do you use technology to identify suitable retailers/purchase outlets? Google(368) is again the leader followed by sporting organisations websites (105)

Platform	Connect with Paddlers	Organise paddling activities	Identify Places to padde	Paddling Performance	Safety Information Advice	Identify suitable retailers/purchase outlets	Total

Google			316	3	210	368	897
Facebook	374	276	7			11	668
Garmin	11		1	246			258
Waterwaysguide.org.au			86		95	12	193
WhatsApp	70	66					136
Website	14	15				105	134
Email	46	65					111
Strava	41	4	8	43			96
Surfski.info					43		43
Willy weather					38		38
BOM					37		37
Sea Breeze					37		37
SMS	14	22					36
Phone	20	15					35
Meetup	4	15					19
Suunto				14			14
Teamapp	7	6					13
go paddling app			11				11
Training Peaks				8			8
You tube				7			7
Polar				6			6
Sports Tracker/Map my....				6			6
American White water			5				5
paddling.net			2				2
all trails			2				2
Other	32	16	27	51	65	28	219
Total	633	500	465	384	525	524	

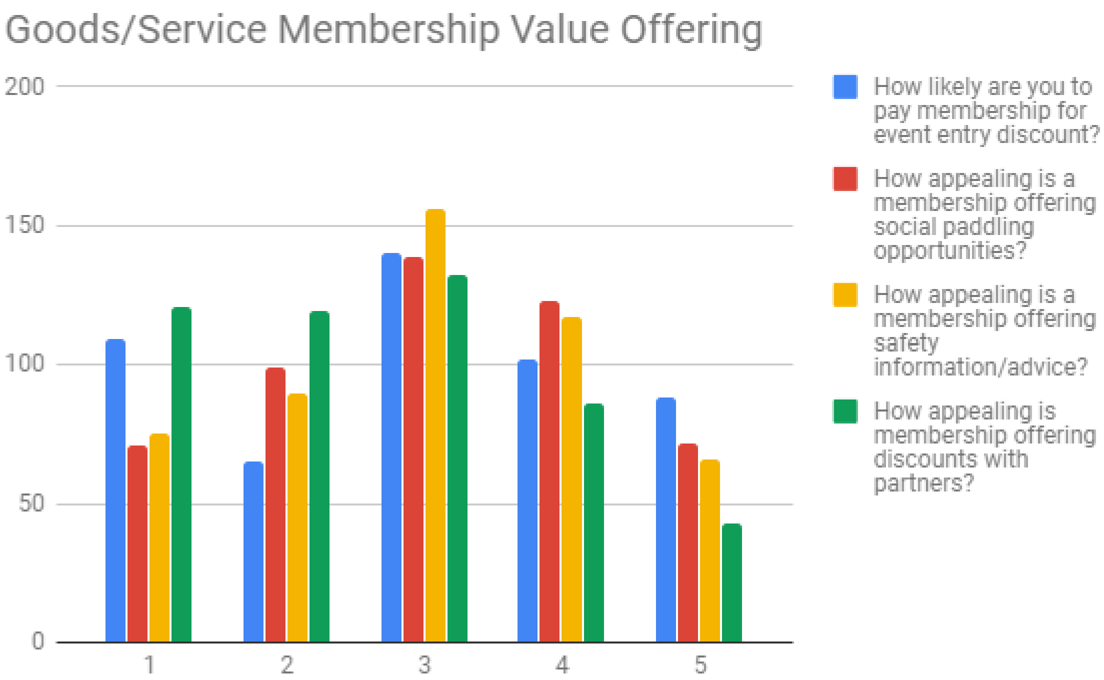
4.7 Motivations



Paddler motivations were considered in the context of the recreational sport participation scale. A standard 5-point likert scale was used. Paddling for fitness/workout was valued most with an average score of 4.2 closely followed by sensory experience 4.07, the least important motivation for paddling was victory/winning with an average score of 2.58.

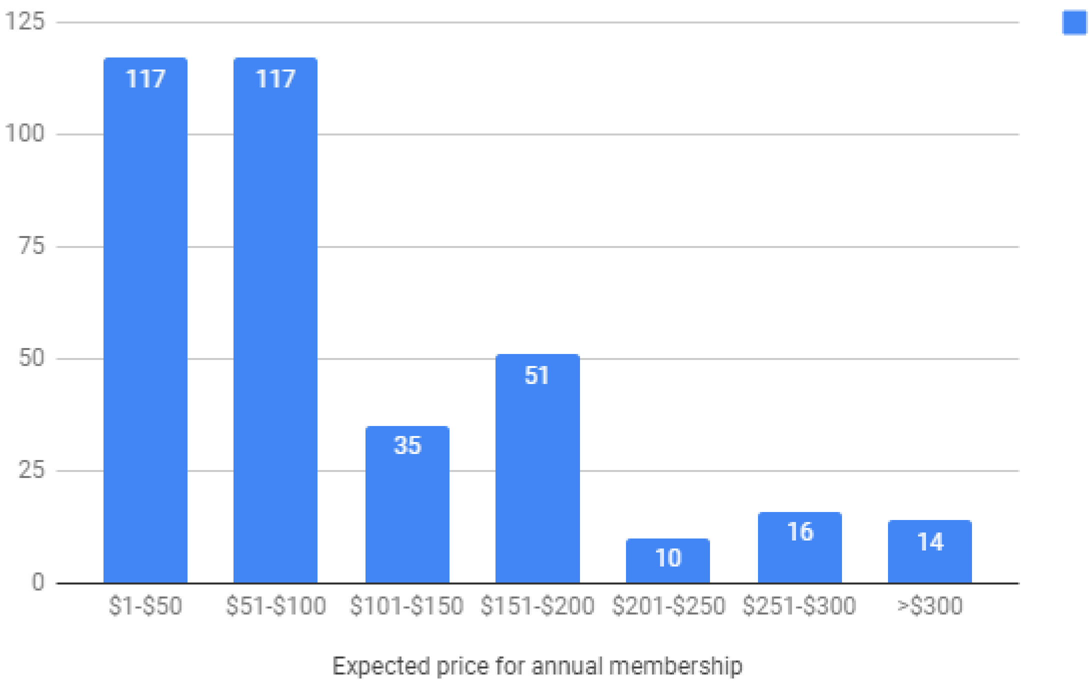
Opportunities for the sporting organisation are to offer alternative marketing messages and slightly different service offerings. In order to be more appealing to the motivation of sensory might be a 5-10km paddle, BBQ lunch and nature/treasure photo hunt.
In order to be more appealing to the social motivation could be the addition of a club point score or bonus points to the existing marathon series.

4.8 Membership Offering



All questions scored averages between 2.6 and 3.05 suggesting that each item is equally important to the paddlers surveyed.

The average amount a paddler respondent would expect to pay for the above service offering, based on 360 responses completed, with an average $126.25.



Other items considered important in the membership offering are:

Are there any other goods/services you would consider important in membership?	No Responses

Coaching/Structured Training Sessions	40
Insurance	26
Boat Storage	12
Merchandise/Product Discounts	11
Access to water	6
Boat Transport	3
Access to Gym equipment	3
Accommodation	2

5.0 Discussion

The purpose of the study was to better understand what paddlers value and their motivations. As a sporting organisation are we able to provide products/services that represent value to paddlers.

The framework for the study was based on the Sports commitment model and the recreational sport participation model. The study also considers expected trends in sport business, including current technology use with a view to identifying strategies to take advantage of new technology, tapping new markets and improving targeting efforts. The latter part of the study is to translate the current service offerings into “Willingness to Pay” dollar value.

The sport commitment model is important to identify retention strategies as Rosenberg and Czepiel (1983) reported that it cost six time more to attract a new customer than to retain an existing one.

When making a simple comparison of the results to the adult tennis player results (Casper, Gray and Stellino 2007) The questions were developed to fit each area however they are specific for the sport. This meant average scores for each area rather were used rather than for each question for comparison purposes.

Comparison of the application of Sports Commitment Model		
	Adult Tennis Players	Paddlers
Commitment	4.21	4.22
Involvement Opportunities	3.99	3.77
Constraints	1.38	2.85
Social Support	3.265	2.33
Participation Frequency		
Winter	7.28	16.07
Spring	10.73	16.7

Summer	14.45	13.25
Fall	10.59	18.2
Total Annual Purchase intention	975.01	3286.74

The average scores for commitment were very similar and is the most important factor in the sports commitment model. Both sports showed involvement opportunities as the second most important consideration, with constraints and social support showing less importance.

Participation appears to be more seasonal in tennis than across paddling although when looking at the subset of non members the participation frequency reflected the results found in Tennis.

The annual purchase intention is much higher for paddlers, likely to be due to the high cost of boats which was $1697.85.

The inclusion of the recreation sport participation scale in the survey questions has achieved it's intend outcome, in separating motivations within subcultures, in this case paddling. The subcultures used to measure the recreation participation scale against were paddle sports.

The purpose for using this scale is to improve product and service offerings for specific target segments, as well as the corresponding marketing messages.

Mueller 2012 has included keywords for each of the dimensions in the Recreational Sport participation scale.

Wicker 2011 "Willingness-to-pay in Non Profit sports clubs" identify annual membership fees across 21 sports in Germany and identifies the mean across the sports €148.07 which converts to $240.80 AUD. The study identified an average "Willingness to pay" (WTP) of $126.25 which is substantially less. Wickers study also demonstrated that there was a WTP much higher than the membership fee and that the WTP showed high variance both between clubs and between sports. The large variance in WTP is explained in the inconsistent transparency of costs for the sporting organisation and the varying perceptions of value.

Mahony and Howard (2001) identify trends in the area of improving targeting efforts, which is supported in the study using the Recreation Sport Participation Scale. Current technology use has been identified in the study, with focus placed on the most popular technologies to integrate (or at the very least employ the best features) with current goods and service offering. The technologies identified during the study included:

Google

- Identify places to paddle
  - incorporate a Google Adgrant with waterways guide with search engine optimisation (SEO)

- Safety Information/Advice
  - This should be part of a forum on the website again (possibly Facebook integration) with optimised SEO and supported by Google Adgrant
- Identify suitable retailers/purchase outlets
  - Partner – consider partners in the product service offering
  - Consider selling appropriate merchandise

Facebook

- Implement social streams on website with seamless integration to connect with paddlers and organise paddling activities

Garmin

- Establish third party access through to website and log activity against user as well as location. Integrate with waterwaysguide.org.au

In addition to implementing the most popular technologies, other technologies should have their best features identified for integration and inclusion in the service offering.

6.0 Conclusion

The values of paddlers have been considered throughout this study in terms of motivations, predictors of commitment, membership offerings and willingness to pay.

The recommendations are based on the general overview of trends for sport business specifically:

- Taking advantage of technology
  Integrating technology already used by paddlers in a feature rich way, to enhance the paddling experience as well as the opportunities for others to participate. Better use of information assets to capitalise opportunities within existing platforms for feature rich content.
- Tapping new markets
  Partnering with other sports to co host events with the possibility of optional taster vs standard length distances for those trying the sport for the first time.
- Improving targeting efforts
  This could be done by altering marketing messages to target different motivations, as well as, offering variations for the event.
- Staying focussed on the most important aspects for paddlers
  -Involvement opportunities was the highest scoring area for paddler commitment. The sporting organisation should not lose focus as this will be a key to membership retention
  -The sporting organisation should consider the items identified by respondents as important in the membership offering as this will also be a key retention strategy.
- Transparently communicating costs associated with the sporting organisation effectively increases the willingness to pay.

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8.0 Appendix

Appendix 1.

QUESTIONS RESPONSES 504

Paddler Interests and Values

The purpose of this survey is to better understand the values of paddlers, as well paddlers product, service and social interests. should take 5-10 mins to complete.

Your email address is only required to validate 1 response per email address. Your email address will not be shared with anyone. The results will be published as aggregate results only

What Country do you live in ? *

Which State do you live in? *

Gender *

How old are you? *

What is your annual income? (optional)

Are you a member of a sporting association?

Are you a member of a paddling association?

Section 2 of 10

Enjoyment

Which paddle sports do you participate in ?

How often do you paddle ?

How many times per month do you paddle in spring?

How many times per month do you paddle in summer?

How many times per month do you paddle in autumn?

How many times per month do you paddle in winter?

How many years have you been paddling for?

How dedicated are you to paddling?

How proud are you to tell other people that you paddle

Section 3 of 10

Personal Investment

How many boats/ paddle craft/SUP's do you own?

Approximately how much would you spend annually on boats/paddle craft?

Approximately how much would you spend annually on other products? eg accessories, paddles

Approximately how much would you spend annually on services? eg tours, coaching

Approximately how much would you spend annually on memberships and subscriptions?

Approximately how much would you spend annually on race and event fees?

Section 4 of 10

Involvement Opportunities

How interested are you in paddling with a club?

Would you miss your friends if you quit paddling?

How interested are you in paddling in events?

How interested are you in unique paddling experiences?

How interested are you in paddling trips/weekends?

How interested are you in paddling group/ team activities?

Involvement Alternatives

Do you participate in other sports/ recreation activities?

Section 5 of 10

Alternative Sports/Recreation

Which other Sports/ Recreation do you participate in

How many times per month during SPRING do you participate in alternative sports/recreation?

How many times per month during SUMMER do you participate in alternative sports/recreation?

How many times per month during AUTUMN do you participate in alternative sports/recreation?

How many times per month during WINTER do you participate in alternative sports/recreation?

Section 6 of 10

Constraints

How much do family commitments impact your paddling?

How much does transportation and storage impact your paddling?

How much does convenient location/s impact your paddling?

Section 7 of 10

Social Support

How important is it that people say things to make me feel good about paddling?

How important is it that other people encourage me to paddle?

How important is it that significant others say things to keep me paddling?

Section 8 of 10

Technology

Do you use technology to connect with paddlerss?

Do you use technology to organise paddling activities?

Do you use technology for identifying places to paddle?

Do you use technology to assist your paddling performance?

Do you use technology for safety information/advice?

Do you use technology to identify suitable retailers/purchase outlets?

Section 9 of 10

Motivations

How motivated are you to paddle as a challenge?

How motivated are you to paddle for victory/winning?

How motivated are you to paddle for fitness/workout?

How motivated are you to paddle for sensory experience? eg scenery, whitewater

How motivated are you to paddle for the social experience?

Section 10 of 10

Goods/Service Value Offering

How likely are you to pay membership for event entry discount?

How appealing is a membership offering social paddling opportunities?

How appealing is a membership offering safety information/advice?

How appealing is membership offering discounts with partners?

How much would you pay annually for membership with the above service offerings

Are there any other goods/services you would consider important in a membership ?

Are you interested in receiving the results of the survey?

Thank You