

SPORTAUS

AUSPLAY



Martial arts

State of Play Report

Driving Participation & Engagement

April 2019





About this Report

The State of Play Report has been designed to deliver a single sport snapshot, to help identify trends and opportunities to maximise participation and engagement.

AusPlay Data

The nationwide AusPlay survey has been running since October 2015, using Computer Assisted Telephone Interviewing (CATI).

The core aim of AusPlay data is to provide accurate and reliable information on trends in participation and physical activities among Australian residents, including Children Aged Under 15 and Adults 15+.

Annually, a total of about 20,000 interviews are conducted with Adults Aged 15+ and about 3,500 interviews with parents/guardians of Children Under 15.

AusPlay is carried out in compliance with ISO 20252 and membership requirements for the Association of Market and Social Research Organisations (AMSRO) and the Australian Market and Social Research Society (AMSRS).

Data within this report

This report contains data collected from January 2016 to December 2018.

Data within this report has been prepared by Sport Australia and may vary from other published AusPlay data due to differences in definitions and/or data classifications.

Martial arts: State of Play Report

Key Take Outs



Overall Participation

The annual population estimate for Adults 15+ participating in Martial arts was 248,351 (or 1.2% of the Adult 15+ population).

Adult participation was slightly skewed towards females (136,998 or 1.3% of the female population), with women accounting for 55% of participation. It is, however, one of the more gender balanced sports/physical activities.

A very high proportion of Adult 15+ Martial arts participation was organised (85%).

Peak participation rates paint an interesting picture. Even though Children's participation in Martial arts was low and the subsequent sample did not allow for detailed analysis, participation for males peaked at 9-11 years of age and then decreased with age. Females, on the other hand, were not as active in organised Martial arts during childhood, but participation increased at 55-64 and especially 65+ years of age.

Frequency & Duration

Adults 15+ who participated in Martial arts had a median frequency of 65 sessions per annum (slightly more than once per week) and the median session duration was 60 minutes.

Sport Most Strongly Associated With (loyalty)

While slightly more women participated in Martial arts than men, males were more likely to be loyal to it. Twice as many men than women

(119,091 or 1.2% of the male population compared to 60,024 or 0.6% of the female population) considered Martial arts the sport they most strongly associate with.

Spend

A total of \$87+ million per annum was spent on Adult 15+ Martial arts participation. Median annual spend was \$260 per Adult participant.

Motivations for Participation (Adults 15+)

The dominant motivation to participate in Martial arts was 'Physical health/fitness' (68%), followed by 'Fun/enjoyment' (31%), 'Psychological/mental health/therapy' (21%, this motivator being more prevalent among middle aged and older Adults) and 'Social reasons' (16%).

Reasons For Dropping Out of Participation

The dominant reason for dropping out of Martial arts participation was 'Not enough time/too many other commitments' (39%).

Growth & Opportunities

Net growth market opportunity is very healthy (49% potential increase) and there was interest in Martial arts at most stages of life, including a substantial number of older Adults aged 65+ who are considering taking it up.

Martial arts (Adults 15+)

Snapshot



AusPlay data, Adult and Martial arts Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Martial arts Participants 15+ n=827



Information on this page provides a snapshot of the Adult 15+ population, at total national level and by gender.

Participation figures are shown as total volume among the Adult 15+ population and the % who have participated.

This provides a read on participation levels, along with the market size when it comes to sports wear and apparel.

Engagement & Participation	Total	Male	Female
Is Most Strongly Associated Sport (%)	0.9%	1.2%	0.6%
Is Most Strongly Associated Sport (People)	179,114	119,091	60,024
Participation (%)	1.2%	1.1%	1.3%
Participation (People)	248,351	111,353	136,998
Average Frequency Per Annum	104	131	82

Conversion to Organised & Club	Total	Male	Female
Participation (People)	248,351	111,353	136,998
Organised Participation (People)	210,150	91,466	118,684
Conversion to organised (%)	85%	82%	87%
Club Participation (People)	36,135	22,370	13,764
Conversion to club – from Overall Participation (%)	15%	20%	10%
Conversion to club – from Organised Participation (%)	17%	24%	12%

Martial arts (Adults 15+)

Snapshot by State



AusPlay data, Adult and Martial arts Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Martial arts Participants 15+ n=827



Information on this page provides a snapshot of the Adult 15+ population, at total national level and by state.

Participation figures are shown as total volume among the Adult 15+ population in each state and the % who have participated.

This provides a snapshot to help identify state level strengths and weaknesses.

Engagement & Participation	Total	NSW	VIC	QLD	SA
Is Most Strongly Associated Sport (%)	0.9%	0.9%	0.8%	1.0%	0.7%
Is Most Strongly Associated Sport (People)	179,114	58,126	41,220	41,002	10,137
Participation (%)	1.2%	1.3%	1.2%	1.3%	1.0%
Participation (People)	248,351	83,331	58,545	51,946	14,356
Average Frequency Per Annum	104	108	93	117	85

Conversion to Organised & Club	Total	NSW	VIC	QLD	SA
Participation (People)	248,351	83,331	58,545	51,946	14,356
Organised Participation (People)	210,150	71,726	48,093	45,034	13,262
Conversion to organised (%)	84.6%	86.1%	82.1%	86.7%	92.4%
Club Participation (People)	36,135	11,684	5,649	11,071	3,486
Conversion to club – from Overall Participation (%)	14.5%	14.0%	9.6%	21.3%	24.3%
Conversion to club – from Organised Participation (%)	17.2%	16.3%	11.7%	24.6%	26.3%

Martial arts (Adults 15+)

Snapshot by State



AusPlay data, Adult and Martial arts Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Martial arts Participants 15+ n=827



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Participation figures are shown as total volume among the Adult 15+ population in each state and the % who have participated.

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Engagement & Participation	Total	WA	ACT	NT	TAS
Is Most Strongly Associated Sport (%)	0.9%	0.9%	1.3%	0.4%	0.9%
Is Most Strongly Associated Sport (People)	179,114	19,703	4,241	740	3,946
Participation (%)	1.2%	1.3%	1.5%	0.5%	1.2%
Participation (People)	248,351	28,915	5,031	1,038	5,189
Average Frequency Per Annum	104	105	92	75	95

Conversion to Organised & Club	Total	WA	ACT	NT	TAS
Participation (People)	248,351	28,915	5,031	1,038	5,189
Organised Participation (People)	210,150	23,780	3,953	897	3,406
Conversion to organised (%)	84.6%	82.2%	78.6%	86.3%	65.6%
Club Participation (People)	36,135	3,273	741	0	231
Conversion to club – from Overall Participation (%)	14.5%	11.3%	14.7%	0.0%	4.4%
Conversion to club – from Organised Participation (%)	17.2%	13.8%	18.7%	0.0%	6.8%

Martial arts (Adults 15+)

Trends

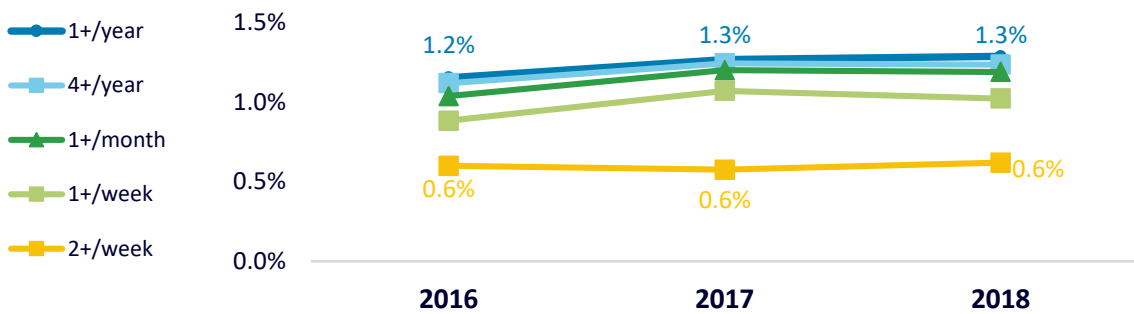


Information on this page provides overall participation and organised participation trends among the Adult 15+ population.

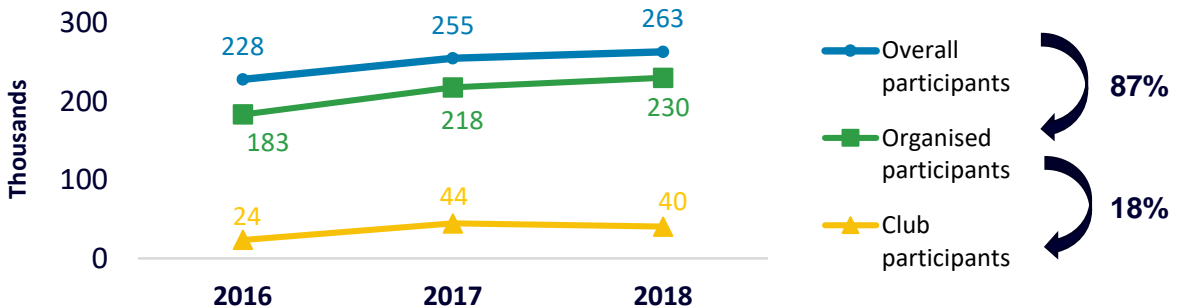
As more data becomes available in subsequent report releases, time series data will be expanded.

This provides a read on participation trends to identify if a sport is gaining or contracting when it comes to participation metrics.

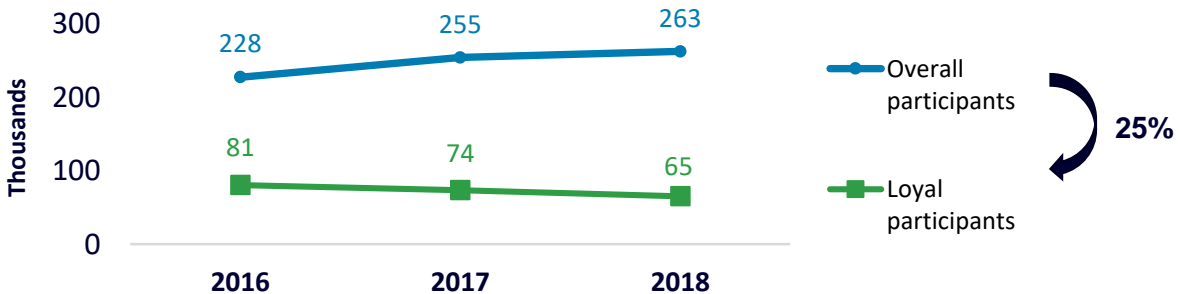
Participation Trends



Conversion to Organised - Evolution



Loyalty among Participants - Trend



Martial arts

Participation by Life Stage



AusPlay data, Adult and Martial arts Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Martial arts Participants 15+ n=827

AusPlay data, Children and Martial arts Participant Population 0-14: January 2016 to December 2018 Children 0-14 n=10,285; Martial arts Participants 0-14 n=160

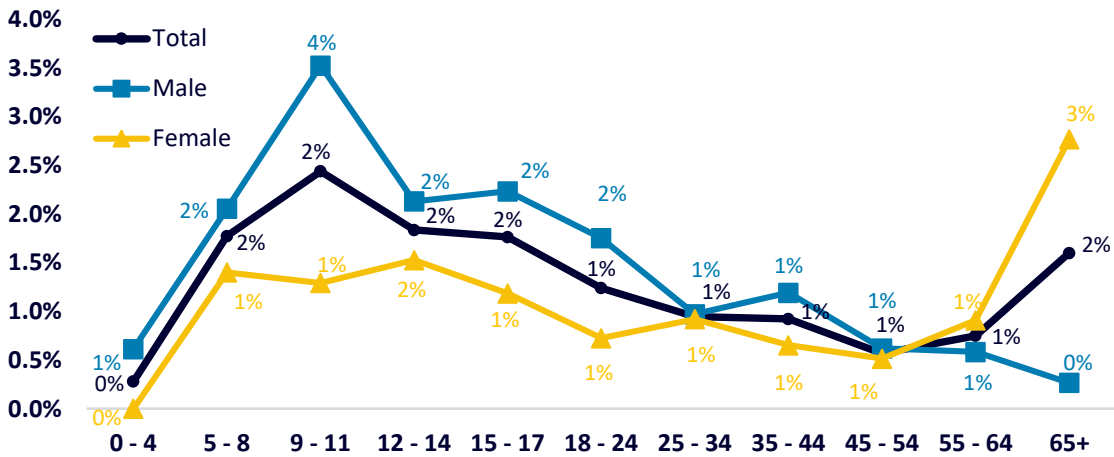


Information on this page provides a snapshot of participation at national level, by age and by gender.

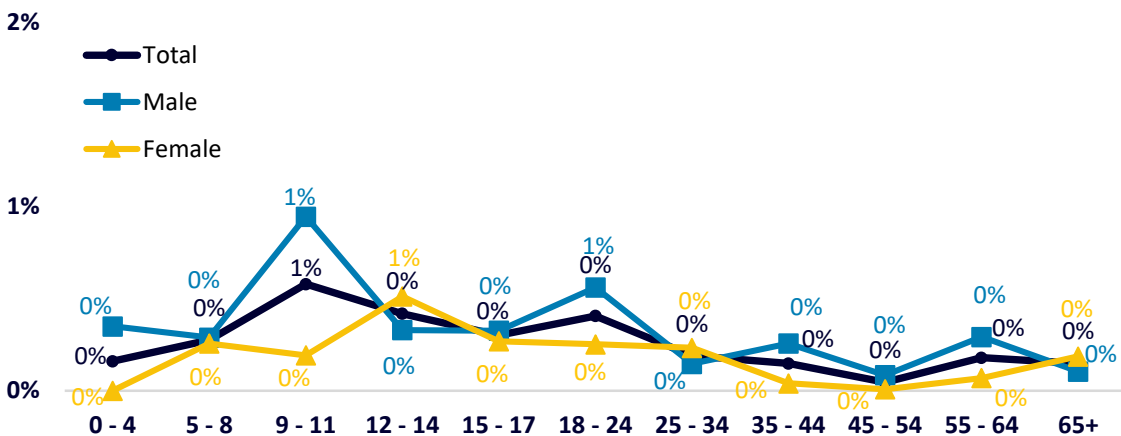
Figures are shown as the % of each age who have participated.

This provides a read of peak participation rates by age, to help identify opportunities to develop targeted initiatives aimed at boosting participation among specific age and gender groups.

Participation by Life Stage - Organised



Participation by Life Stage - Club



Martial arts

State of Play Report

Adults 15+



Martial arts (Adults 15+)

Participation Levels



AusPlay data, Adult and Martial arts Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Martial arts Participants 15+ n=827

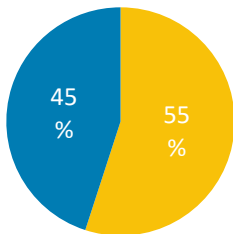


Information on this page provides a snapshot of the Adult 15+ population, at total national level and by gender.

Gender split shows the contribution each gender makes when it comes to total participation. Participation levels are shown as total volume among the Adult 15+ population and the % who have participated.

This provides a snapshot to help identify the age and gender groups that are driving current participation volume, whilst also helping to identify potential growth opportunities.

Gender Split



Participation Levels

	Total Participation	Male Participation	Female Participation
%	1.2%	1.1%	1.3%
000's	248.4	111.4	137.0

Participation Levels by Age and Gender

Peak Participation by Age



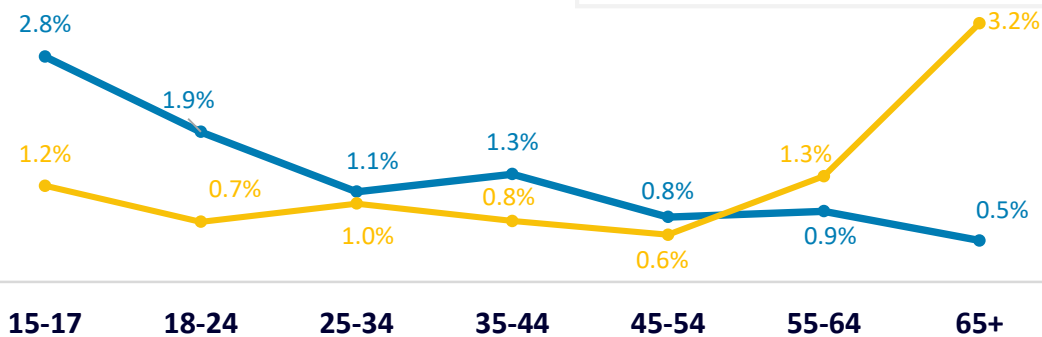
15-17

Male



65+

Female



Martial arts (Adults 15+)

Participation by Location



AusPlay data, Adult Population 15+: January 2016 to December 2018 Adult 15+ n=61,579



Information on this page provides a snapshot of the Adult 15+ population, based on state and geography.

Participation levels are shown as total volume among the Adult 15+ population and the % who have participated.

This provides a snapshot to help identify state level participation, as well as differences across metro, regional and remote areas.

Participation Levels by State



	Total National Participation	Major Cities	Inner & Outer Regional	Remote & Very Remote
%	1.2%	1.3%	1.2%	0.3%
000's	248.4	180.8	59.9	1.0

Martial arts (Adults 15+)

Player Profile



AusPlay data, Adult and Martial arts Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Martial arts Participants 15+ n=827



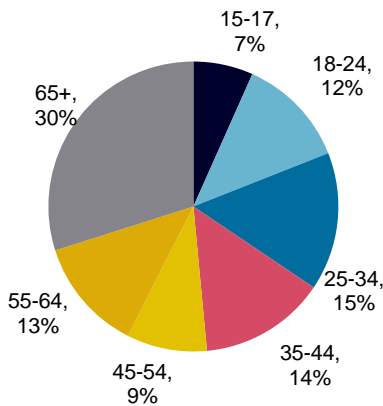
Information on this page provides a snapshot of the Adult 15+ population, based on age and gender, as well as LOTE, People with Disability and Indigenous.

Share of Play by Gender and Age shows the contribution of each group when it comes to overall participation.

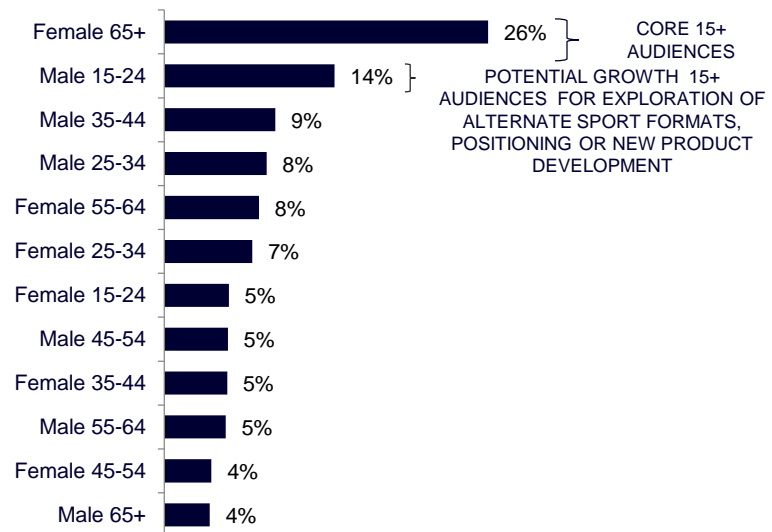
This helps identify the specific age and gender groups that are having the greatest impact on overall participation levels, whilst also highlighting growth opportunities when it comes to sport formats that extend beyond traditional demographic audience needs.

Player Profile by Gender and Age

Age Split



Share of Play by Gender & Age



Participation Levels by Population Group

	Total National Participation	LOTE (Speak language other than English at home)	People with Disability	Indigenous
%	1.2%	0.9%	1.3%	1.5%
000's	248.4	32.1	38.5	6.3

Martial arts (Adults 15+)

Frequency & Duration



AusPlay data, Adult and Martial arts Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Martial arts Participants 15+ n=827

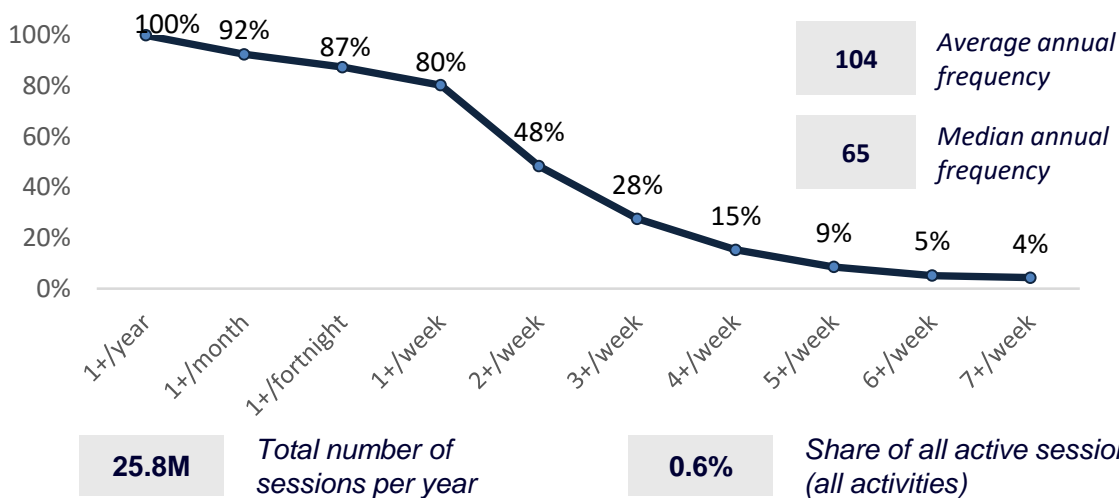


Information on this page provides a snapshot of the Adult 15+ Participant Population, in terms of frequency and duration of participation.

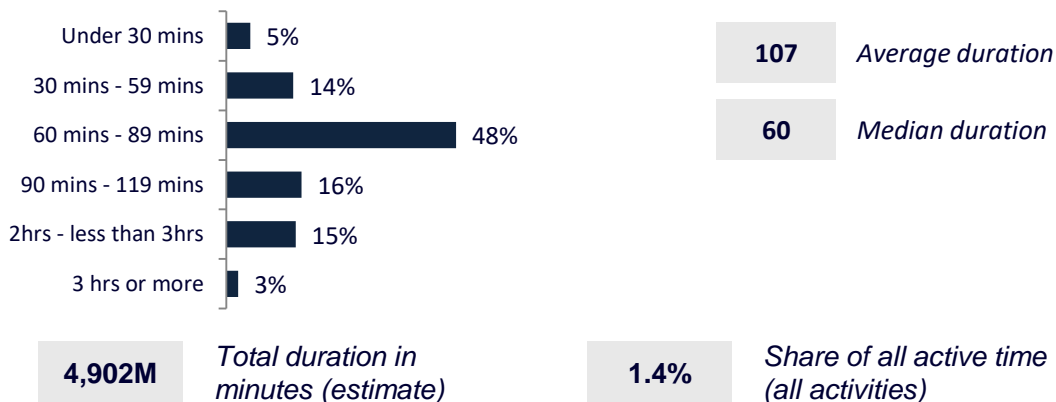
Frequency of participation provides a read on how often participation occurs. Duration provides a read of how long is spent each time participation takes place.

This helps identify opportunities among the Participant Population, in terms of initiatives aimed at boosting the total number of sessions per year by increasing frequency of participation.

Participation Levels by Age and Gender



Participation Levels by Age and Gender



Martial arts (Adults 15+)

Participation



AusPlay data, Adult and Martial arts Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Martial arts Participants 15+ n=827

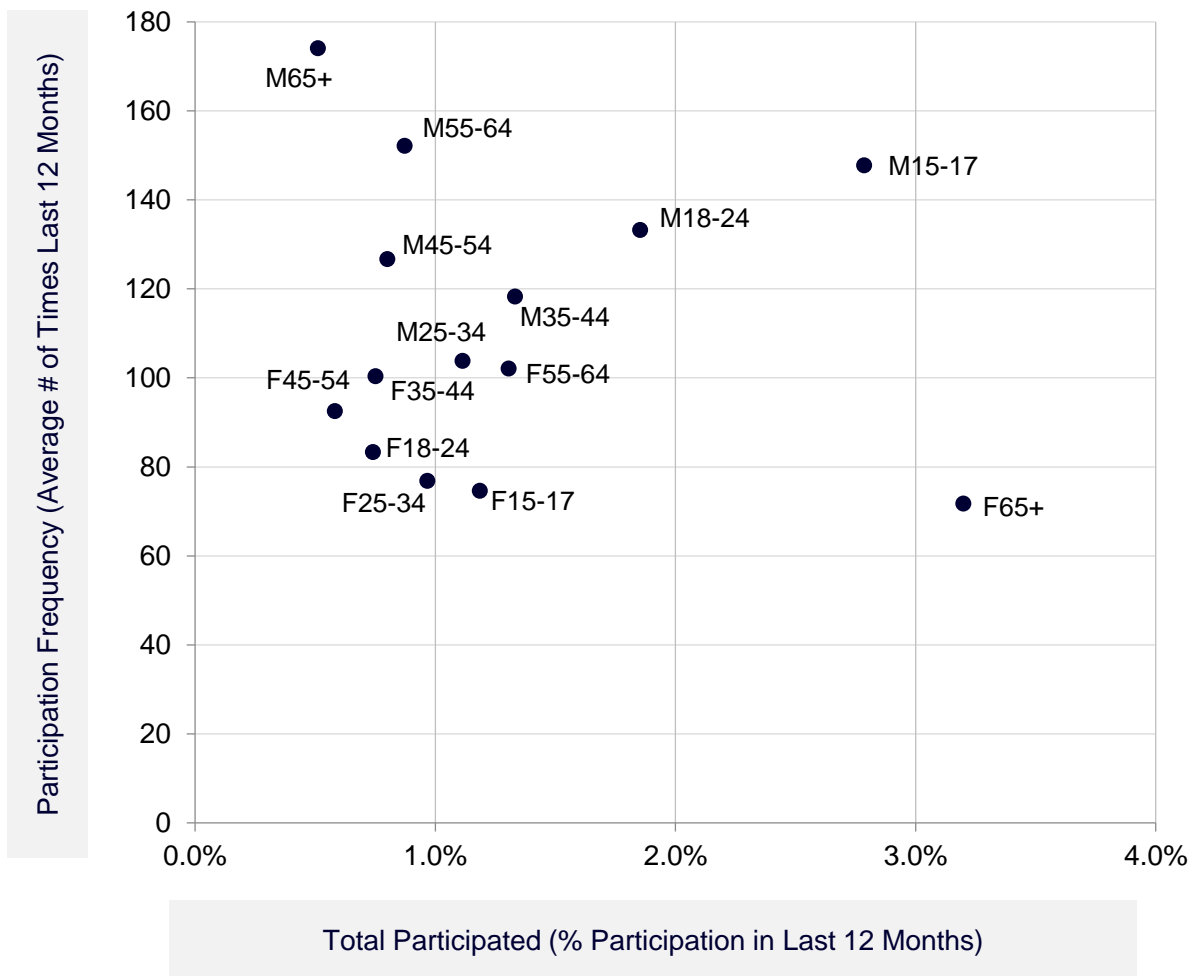


Information on this page provides a snapshot of the Adult 15+ Population in terms of participation and number of times participated in the last 12 months.

Figures are shown by age and gender groups, with those in the top right section being the most active on both measures.

This illustrates the participation profile across different age and gender groups, to identify key opportunities at age and gender level.

Participation & Frequency by Age



Martial arts (Adults 15+)

Current Market Position



AusPlay data, Adult Population 15+: January 2016 to December 2018 Adult 15+ n=61,579

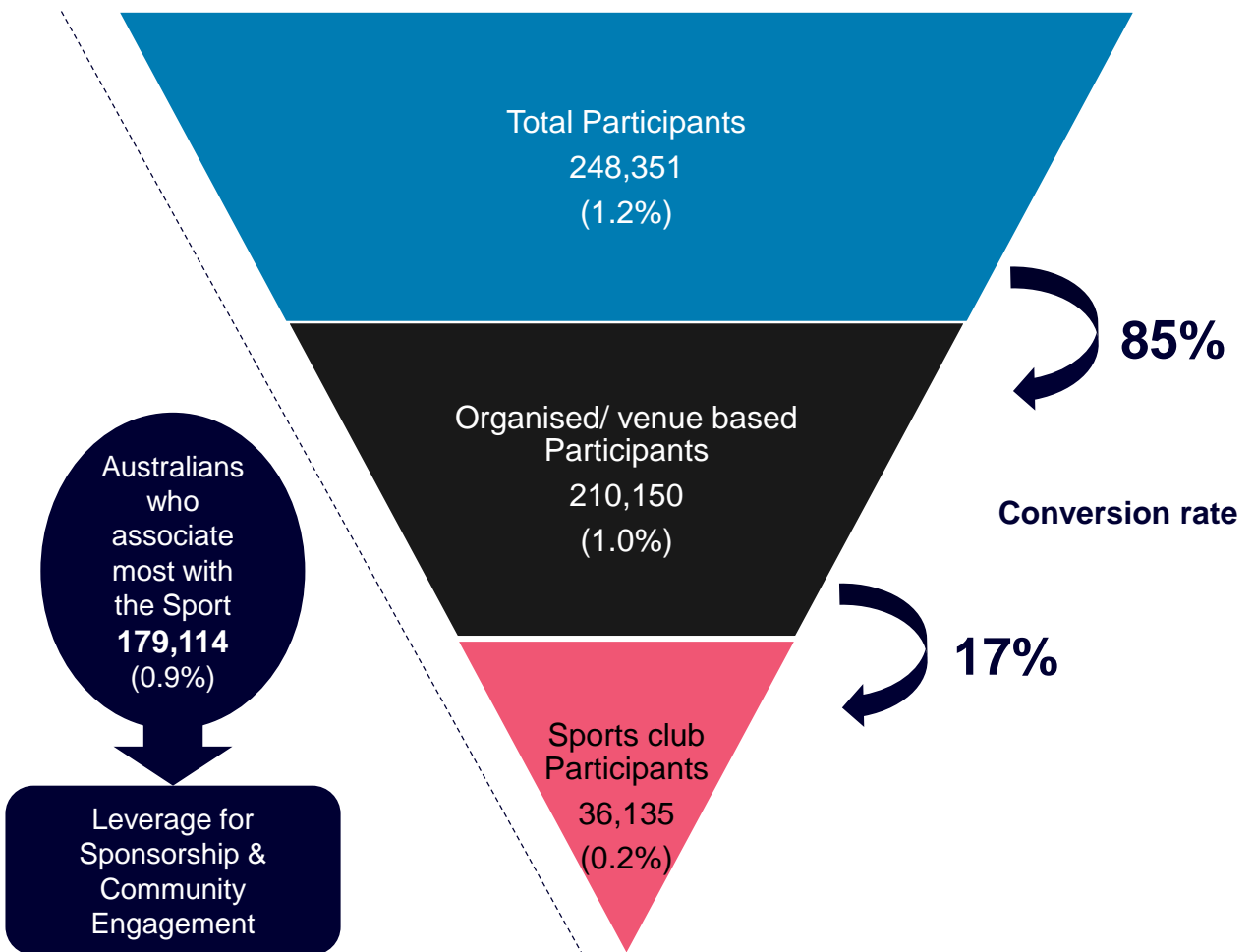


Information on this page provides a snapshot of the Adult 15+ Population, in terms of total participation, organised/venue based participation and sports club participation.

Conversion figures show the conversion from one level to the next.

This highlights opportunities to build on the total participation base to drive increased organised/venue based participation and sports club participation.

Martial arts Association & Participation Levels



Martial arts (Adults 15+)

Engagement



AusPlay data, Adult and Martial arts Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Martial arts Participants 15+ n=827

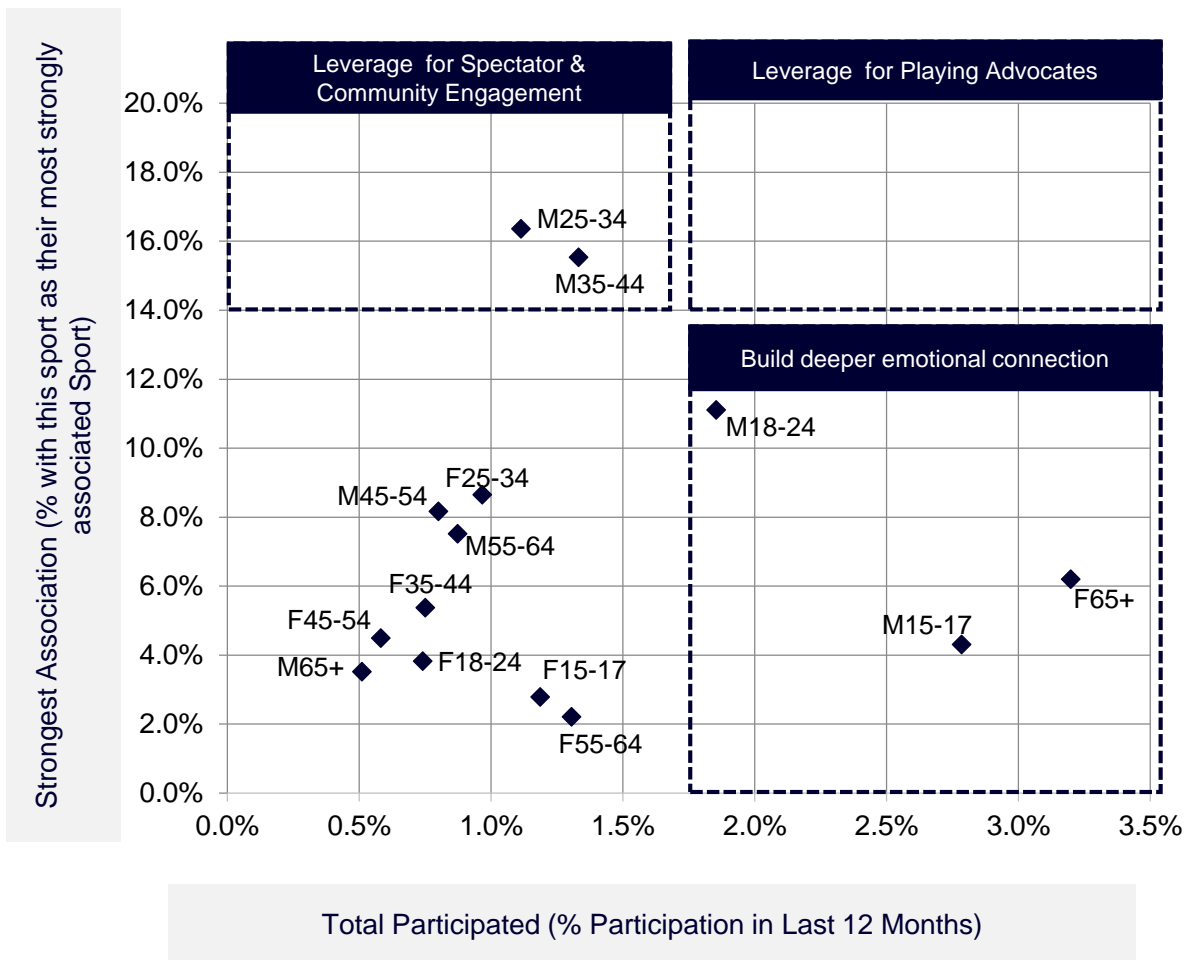


Information on this page provides a snapshot of the Adult 15+ Population in terms of participation and the % of the Adult 15+ Population who have nominated this as the sport they most strongly associate with.

Figures are shown by age and gender groups, with those in the top right section being the most active on both measures.

This highlights opportunities to leverage demographic groups that have a strong association with a sport and those who participate.

Participation & Association by Age



Martial arts (Adults 15+)

Spend Profile



AusPlay data, Martial arts Participant 15+: January 2016 to December 2018 n=827

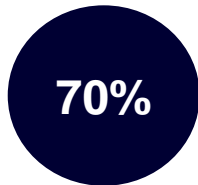


Information on this page provides a snapshot of the Adult 15+ Population, in terms of paid participation.

Figures shown are based on annual spend.

Median and average annual spend figures illustrate the incremental annual uplift in expenditure on participation that can be attributed to each additional person who pays to participate in this sport.

Martial arts Overall Spend Levels



of participants
paid to
participate

	All	Club
Median annual spend	\$260	\$200
Average annual spend	\$557	\$638
Share of total spend (Share of all activities participated in)	1.0%	0.6%



Total expenditure on all participation

\$87,689,371



Total expenditure on **club** participation

\$16,818,763

Participation Spend by Gender	Total	Male	Female
Paid to Participate (%)	70.4%	70.4%	70.4%
Paid to Participate (People)	174,844	78,385	96,459
Average annual spend per participant	\$557	\$747	\$410
Total national annual spend	\$87.7M	\$51.2M	\$36.4M

Martial arts (Adults 15+)

Market Outlook & Opportunity



AusPlay data, Adult Population 15+: January 2016 to December 2018 Adult 15+ n=61,579



Information on this page provides a snapshot of the Adult 15+ Population in terms of market opportunity.

Figures shown represent volume of Adults 15+.

The gap between those considering this sport and those at risk of dropping out/ have already dropped out represents the net increase in total market opportunity.

Martial arts Market Opportunity



Martial arts (Adults 15+)

Market Outlook & Opportunity



AusPlay data, Adult Population 15+: January 2016 to December 2018 Adult 15+ n=61,579



Information on this page provides a snapshot of the Adult 15+ Population by gender and age in terms of market opportunity.

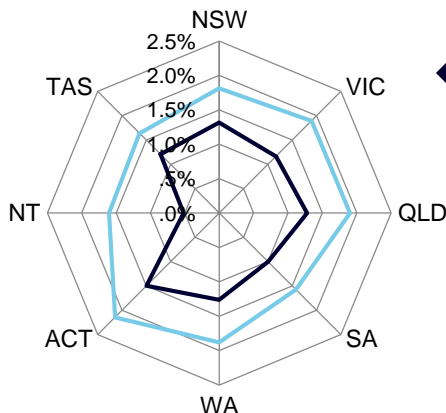
Figures shown represent the volume of people and %'s.

This highlights the strongest opportunities by gender and age, with the gap between those considering this sport and those at risk of dropping out/ have already dropped out representing the net increase in market opportunity among each group.

Martial arts Market Opportunity by Gender & Age

	TOTAL	♂	♀	15-24	25-44	45-64	65+
Participants – last 12 months (%)	1.2%	1.1%	1.3%	1.5%	1.0%	0.9%	1.9%
Participants – last 12 months (People)	248,351	111,353	136,998	47,208	73,243	53,658	74,243
Considering Next 12 Months (%)	0.7%	0.7%	0.8%	1.0%	0.9%	0.6%	0.6%
Considering Next 12 Months (People)	150,009	69,550	80,458	32,378	61,861	34,462	21,308
At Risk of Dropping Out or Have Already Dropped Out (%)	11.1%	10.1%	11.9%	18.6%	11.3%	12.4%	5.1%
At Risk of Dropping Out or Have Already Dropped Out (People)	27,506	11,263	16,243	8,793	8,256	6,651	3,806
Net Gain/ Loss (People)	122,502	58,287	64,215	23,585	53,605	27,811	17,502
Projected (People)	370,853	169,641	201,212	70,793	126,848	81,468	91,744

Martial arts Market Opportunity by State



— Current Participation
— Projected Participation

This shows market opportunity by state, on a per capita basis.

Martial arts (Adults 15+)

Motivations for Participation



AusPlay data, Martial arts Participant 15+: January 2016 to December 2018 n=827



Information on this page provides a snapshot of the Adult 15+ Population as well as by gender and age in terms of motivations to participate.

Adult 15+ motivations are shown to the left and gender and age specific motivations are shown to the right.

This highlights the dominant overall motivations as well as similarities and differences at age and gender level. When designing strategies, products or messaging to engage with specific demographic groups, these should be built around the core motivations of that audience.

Top 10 Motivations to Participate*

Adults 15+



By Gender

	1st	2nd	3rd
Male	Physical health/fitness	Fun/ enjoyment	Psychological/ mental health/therapy
Female	Physical health/fitness	Fun/ enjoyment	Psychological/ mental health/therapy

By Age

	1st	2nd	3rd
15-17	Fun/ enjoyment	Physical health/fitness	Social reasons
18-24	Physical health/fitness	Fun/ enjoyment	Social reasons
25-34	Physical health/fitness	Fun/ enjoyment	Psychological/ mental health/therapy
35-44	Physical health/fitness	Fun/ enjoyment	Psychological/ mental health/therapy
45-54	Physical health/fitness	Psychological/ mental health/therapy	Fun/ enjoyment
55-64	Physical health/fitness	Psychological/ mental health/therapy	Fun/ enjoyment
65+	Physical health/fitness	Psychological/ mental health/therapy	Social reasons

* Multiple response question

Martial arts (Adults 15+)

Top 10 Reasons for Drop Out or Consideration



AusPlay data, Adult Martial arts Participants 15+, that are dropping out of participation in the next 12 months: January 2016 to December 2018 n=60; Adult Population 15+: n=61,579;



Information on this page provides a snapshot the top 10 reasons for dropping out as well as the top 10 reasons for considering this sport.

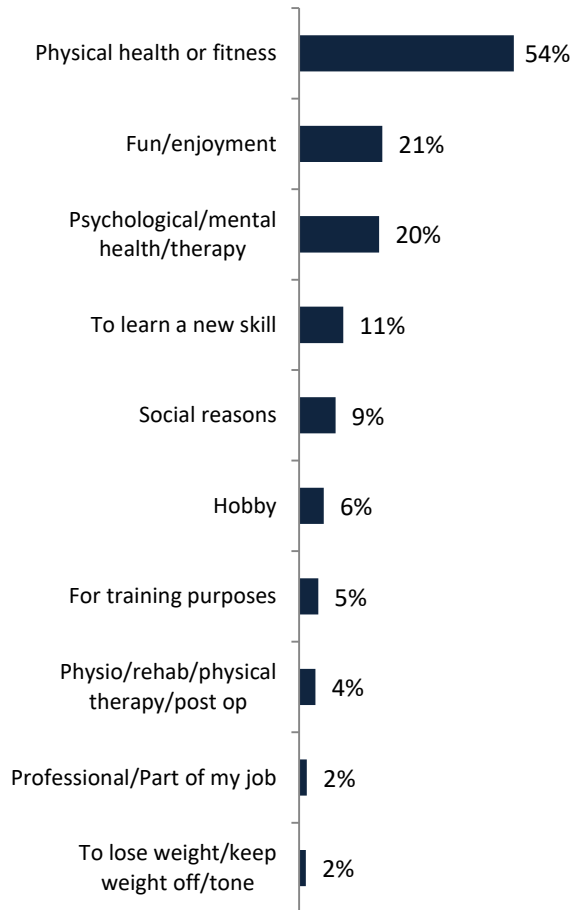
Responses are multiple response, meaning more than one reason can be given.

Identifying reasons for dropping out can play a role in identifying opportunities for innovations in product portfolio or alternate sport formats. Identifying reasons for consideration can play a role in optimising messaging, communications and advertising.

Top 10 Reasons for Drop Out



Top 10 Reasons for Consideration



* Multiple response question



Where to from here?

More information about AusPlay, including the methodology summary, survey questions, key terms and definitions, national tables etc., can be accessed via Sport Australia's Sport Market Insights on the Clearinghouse for Sport website (with direct access through researchinsport.com.au). Please use your Clearinghouse for Sport login for full access.







Any further questions about AusPlay (or queries for additional customised reporting/further analysis of the dataset) can be directed to Sport Australia via: AusPlay@sportaus.gov.au.





Australian Government
Australian Sports Commission

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