



2016 PHYSICAL ACTIVITY AND SPORT
PARTICIPATION CAMPAIGN

INSIGHTS REPORT

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1. Introduction

Australians are increasingly inactive, resulting in increased health risks and a greater disease burden in the population¹. Australian adults are significantly less active than is recommended for good health. More than half of Australian adults are not active enough, and only 43% meet the “sufficiently active” threshold, based on the recommended levels for good health².

Establishing healthy and active lifestyle choices at a young age has lifelong benefits for individuals. *The Australian Physical Activity and Sedentary Behaviour Guidelines*³ recommend that 13 to 17 year olds should maximise their physical activity in as many ways as possible, and sedentary behaviour should be similarly limited. It is recommended that young people should accumulate at least 60 minutes of moderate to vigorous activity every day. Most young Australians fall well short of this recommendation, with only 10% of those in this age group meeting the daily target³. Furthermore, young Australian females are twice as likely to be sedentary or less active than their male counterparts.

In response to this public health issue, the Australian Government is developing a campaign to communicate with young women in order to generate intentions to participate in a wide range of physical activities and sport, and to enable this by linking them to information about what activities are available. While the campaign is inclusive of girls aged 12 to 19 the primary target audience for this campaign is anticipated to be 15-18 year old girls, and this was subsequently confirmed by the developmental research.

In 2015-2016, TNS Social Research was commissioned to undertake research to inform the development of this campaign, including the concepts, messages and channels likely to resonate with the target audience, and drive involvement in physical activity and sport. The research was entirely qualitative, and conducted in four stages, comprising:

- Extensive developmental research to inform the campaign strategy, messaging, executional direction and channels. Group discussions and interviews also reviewed an existing physical activity television advertisement from Sport England’s This Girl Can campaign (a physical activity campaign targeting an older age group of women in the UK) to generate discussion on potential executional approaches.
- Three successive waves of concept refinement research were undertaken, each informing further development of the material to optimise its appeal, resonance and impact on the target audience.

Key insights from all four stages of research are summarised in this report.

¹ Australia’s Health 2014

² Reference :Australian Health Survey: Physical Activity, 2011-12

³ Australian Health Survey: First Results, 2011-12

2. Barriers and motivators to participation

The factors that influence engagement in physical activity amongst girls and young women are many and varied. We know from behavioural theory that the drivers of behaviour are complex – incorporating ‘conscious’ motivators (knowledge, attitudes and beliefs), as well as more ‘automatic’ influences like norms, habit, heuristics and environmental influences. The present research confirmed the influence of these often interwoven factors in shaping the frequency and intensity of girls’ participation in physical activity. An overview of the most prominent ‘practical’ and ‘personal’ barriers and motivators to participation appear below.

Personal barriers

Social & emotional costs

For some groups of girls, there were social costs to involvement in physical activity and school sports, particularly if these did not align with the interests of their peer group. There were a range of opportunity costs that appeared to increase as girls got older and found other interests, particularly in the context of increased academic pressure.

Many girls were also extremely self-conscious when exercising, both about their skills and appearance. This appeared to be of particular concern in the presence of males reflecting an associated sense of being judged and assessed on their capability and appearance. Many girls reported feeling humiliated and embarrassed as a result.

A lack of sports capability can also lead to peer exclusion and, in some cases, bullying, further compounding feelings of alienation and a dislike of participation. For some of the girls in the study, the combined effect was to shape a belief that they were essentially unentitled to play.

Identity

As girls progress through adolescence and form a sense of identity as independent people, their capability and skill appear to be ever more significant in determining the extent to which sport/physical activity assumes a part of their sense of self. Self-consciousness is heightened through puberty and is further compounded by body image issues and social hierarchies which become more defined. This appears to have a detrimental effect on the confidence of many girls in a general sense, and – as far as sport/ physical activity is concerned – may limit their interest in and confidence about taking part unless they are very capable.

“If I’m not really good at it, I don’t really enjoy it, and I keep telling myself that I’m bad at it...”

Cultural and social norms are also important in guiding and shaping engagement in physical activity. There were examples of this occurring in a positive way, but, for many, the media was seen largely to present a very glossy view of ‘active people’ as athletic, thin, and attractive. While for some, this made physical activity aspirational, for others these qualities were considered unattainable, reinforcing the belief that physical activity was ‘not for them’.

While, in the main, sport was not seen to be in conflict with female identity, it tended not to be seen as important in this regard, in the way that it was thought to be for boys. Moreover, the level of concern that many girls showed around their appearance while exercising was certainly gender specific, while social stereotypes about girls’ ability to play were pervasive, particularly in co-educational schools.

Avoidance was also a critical barrier to participation, reflecting a combination of general inertia and apathy, dislike for exercise, self-consciousness, limited fitness and low confidence.

Practical barriers

How you feel

While some girls could see past the immediate physical 'stress' of exercise to the longer term benefits, for others this was extremely off-putting. Many, particularly those who are unfit, vehemently disliked becoming hot, red-faced, sweaty and tired, and this was a strong deterrent to participation.

"I definitely do more during the winter than in the summer when it's so hot and you just feel like you're sweating a waterfall."

How capable you are

The present research particularly highlighted the impact of capability and skill in driving or deterring girls to engage in physical activity – most notably, school sports. Capability was, in many senses, at the foundation of both internal and external influences around participation in sport during the teenage years: serving either to strengthen or inhibit a sense of belonging and self-efficacy; and either providing or limiting opportunities for participation.

The research revealed that girls who were less naturally skilled felt less supported by families and at school than those with greater ability.

School can imprint positively and negatively

Girls' early experiences in primary school sports and physical education played a strong 'imprinting' role on their subsequent self-perceptions and motivations towards physical activity during adolescence. The importance of school in enabling or preventing participation should not be underestimated, working in several ways, from general education and training and shaping structured and habitual participation, through to ensuring inclusion and participation and providing exposure to different types of activity.

There were examples of girls whose positive interest in, and commitment to, sport had been shaped by their school experience. In the main, however, these were students who were either moderately or highly skilled at one or more sports, and played routinely in a structured school or club program (often team based) supported by an external competition.

By contrast, the lack of support for those with less natural ability often left them feeling that they were neither capable of playing (both in terms of skill and knowledge) or entitled to try.

A priority placed on building the self-efficacy and confidence of all children at primary school, appears to be replaced by a focus on competition, winning and associated skill with high school level sport. Capability therefore assumes greater importance and it was perceived that for those who enjoy the competitive aspect of sport and are more skilled they may receive more support, both emotionally and practically, whilst in contrast those who show

little interest, capability and personal motivation are more likely to find alternative interests outside of being active.

There was a notable disparity in the resources available between schools, which also impacted participation. Access to certain activities and sport was limited in some regional areas. This had direct consequences on participation in these activities. Conversely, however, in some urban areas, there was less opportunity to engage in outdoor activities like walking/ bike-riding/ swimming at the beach/ surfing.

Participation also tended to fluctuate as a result of seasonal and climatic factors. In southern locations, participation was greater during summer, while in northern states, extreme heat at this time of year could discourage participation. Variation in workload also had a bearing on the extent of involvement, with exams in Term 4 seen to generally take priority over sport/ physical activity at this time of year.

Motivators

It's all about having fun

The 'fun' associated with sport and physical activity was readily identified by study participants. Physical activity and sports were, for many, regarded as social activities, and the friendship and bonding that occurs through participation clearly acted as a strong incentive to get involved. Importantly, while for many, this encouraged participation in team sports at school, the girls who felt thwarted or disillusioned still saw social benefit in engaging in other forms of physical activity like dance, yoga and gym based fitness classes.

There was widespread recognition of the emotional benefits of physical activity, commonly articulated as 'feeling good' – both personally and about life generally. The 'rush' of endorphins was viewed as a well-deserved reward for the pain and exhaustion brought about by physical exertion, also resulting in a sense of pride and achievement and general boost to one's confidence and self-esteem.

The functional benefits of physical activity were also salient with physical appearance being associated with popularity. Health benefits were also identified but, typical of this age-group, they were usually referred to in a fairly generic way ('feeling healthy', 'general wellbeing'), with little spontaneous recognition of the preventative role that exercise plays in protecting against specific illnesses or conditions.

Peer and family norms also play a significant role in influencing participation in physical activity and sport.

There were certainly examples of girls for whom participation was simply not a part of their peer identity: they were not the 'sporty girls'. By contrast, for some in the study, peers played a significant role in providing social approval (or even pressure) to be involved and positioning activity as a fun, social pursuit – in many cases, far stronger motivators than fitness/ health. Friends also helped to reduce self-consciousness around participation, could help to make activity habitual (by setting up a team, playing regularly); and helped each other to build skills and understanding of the game.

Norms set by families were also significant. Parents and siblings role model (or fail to model) participation, and can also facilitate girls' engagement in physical activity in other ways both by active encouragement and support, and in a more practical sense, through the provision of resources and training, transport and financial support.

Routine and habit clearly also play a fundamental role in determining the regularity of girls' engagement in sport and physical activity. When girls were involved in team sports and/or competitions involving regular, dedicated times and places for participation, playing was habitual. Similarly, habits set through a regular exercise routine (running every morning, gym on Thursdays), or even regular incidental activity (walking to the bus) appeared to make participation less onerous. Conversely however, non-active habits – particularly engagement with social media – frequently obstructed involvement.

3. Understanding the audience

The drivers and barriers to engagement in physical activity combine in different ways to influence girls' attitudes and behaviours around participation. The research suggested that girls could be (qualitatively) segmented into five 'like' groups on this basis. These segments were each influenced by an interplay of internal (or belief driven) factors such as ability, confidence, and identity and external factors, such as parents, friends, schools and sporting clubs.

A brief overview of each of the segments identified through the research is described below in order of decreasing levels of activity and engagement with sport and other physical activities.

Segment 1:

The most active segment was regularly engaging in physical activity, including both school sports and other forms of activity, often on a daily basis. Typically highly skilled, they tended to be 'passionate' about physical activity, and it was core to their identity and sense of self, and formed an important part of their social life and general interests. As the most capable girls, their participation was embedded within the school system, and they benefitted from extensive support and multiple opportunities.

"I've got that sort of competitive nature, so I want to get in there and push myself outside my comfort zone..." (Yr 11, regional)

"I go for a run every day, I have to do it to clear my head, especially during exams" (Yr 12, metro)

Segment 2:

A second group also engaged in physical activity regularly, and generally liked to be involved, though were not as 'passionate' as the most active segment. Typically confident socially, this group were drawn to the fun and social aspects of participation, particularly in team sports. Unlike the most active group, however, their participation was less habitual and tended to fluctuate, taking a back-seat at certain times of year when other priorities emerged, like exams, or holidays.

"I like the stuff I'm good at and can do..." (Yr 8, metro)

"I do so much more physical activity now that I'm in high school. I guess it's because I have friends who I can really relate to, now, and I can be me. I can be absolutely stupid so as to make people laugh and they won't care and I just have so much fun. I enjoy it so much!" (Yr 9, metro)

"I love to swim rather than race. This is accepted. I have no pressure to perform at a high standard. I can perform at my standard that makes me feel good." (Yr 12, metro)

"My friends wanted to do it - and they said they needed more team members – so I said I'd just do it..." (Yr 8, metro)

Segment 3:

A third group also enjoyed physical activity and team sports and recognised its social and health benefits, but participated less often than they would have liked, largely as a result of other commitments and interests that often increased as they progressed through school. Highly influenced by their peers, they were often side-tracked by a variety of other activities – from boys to drama or music, homework and exams or work. Once their participation ceased, this group often found it difficult to regain motivation, as other habits formed.

"I just don't have time anymore because I do a lot of drama and I've been busy with exams, now that I'm on holidays maybe I'll try to get more active" (Yr 12, metro)

"Honestly, I do wish I was doing more physical activity. I would like to be fitter than I am and not feel ashamed of the way I look or my figure. I don't have the motivation to do anymore though, which is unfortunate. Money and transport are also a massive reason." (Yr10, regional)

"I think I have stopped doing so much sport because I don't have a lot of time between school, study, work, family and friends. Sport also costs a lot more than it did when I was younger, so it's harder to do a lot of different sports." (Yr10, regional)

Segment 4:

A fourth group of girls was largely disinterested in physical activity or sport. While they may have been active at primary school, the focus on skill and ability as they get older was off-putting for this group, leading them to seek out other interests and pursuits. They tended not to see specific benefits in physical activity, and so saw no real reason to be involved. Any participation was typically low level or incidental.

"I wasn't that good at sport and then I started working so I didn't have time." (Yr 11, metro)

"I don't really have a lot of friends who really do a lot of sport." (Yr 8, regional)

Segment 5:

A low level of participation amongst the final segment of girls was driven more strongly by exclusion and a lack of external support than disinterest. This group typically lacked natural skill or ability, and as a result lacked confidence and were highly self-conscious. This was reinforced by a school system which provided little support in either encouraging or facilitating their involvement. As a result, this group showed very low levels of self-efficacy around participation, and a self-perception that sport/ physical activity was not for them.

"I'm never going to look like that so why should I even try?" (Yr 12, metro)

"You have to be fit to be included. They judge you based on your appearance." (Yr 11, regional)

This segmentation has important implications for the development of the campaign, allowing us to focus on certain cohorts of girls as key target audiences, and providing direction around the messages, approaches and channels most likely to resonate with them. The following section explains this in more detail.

4. Recommended approach for engaging the audience including channels and messaging

The overall audience strategy

At a broad level, the research findings would lead to a strategy as outlined below.

Audience Segment by decreasing engagement level	Message Strategy	Call to action	Priority target audience for campaign?	Tone	Channels
1	Reinforce current active behaviour and attitudes	Keep doing	x		
2	Reinforce current active behaviour and attitudes, focus on maintaining involvement post high school	Keep going	x		
3	Raise awareness & remind about ways to be active, promote choice, and social benefits (fun, feeling good), motivate to return to old favourite activities or try something new	Find your thing from a range of options	✓	Motivating Empowering	TV, online & social media, OOH, and parent engagement
4	Motivate and re-engage through choice, and 'easy ways in/back', something for everyone, doesn't matter about ability, size or fitness (an alternative to being sporty)	Find your thing from a range of options	✓	Motivating Encouraging	TV, online & social media, OOH, and parent engagement
5	Raise awareness of emotional benefits of activity (fun, social, inclusion not exclusion), start with something easy and fun	Be active not sporty	✓	Motivating Empathy	Not overtly above the line, a focus on primary school and parent support

The developmental research clearly identified that segments 3 and 4 should be the primary target audiences for a behaviour change campaign using mass-reach strategies such as advertising. With this in mind, creative development primarily focused on the communications needs of young women in these segments, and to a much

lesser extent segment 5 (to check for no unintended negative impacts on girls who felt excluded from physical activity, or who have excluded themselves). Girls from the most engaged segments, 1 and 2, were excluded from the creative testing research.

The research also revealed that for a campaign to be effective in moving girls from contemplation to activation, a localised activation strategy would greatly enhance the communication and advertising materials by connecting girls with activities available in their area through local community and sporting groups and ensuring a positive response to the campaign translates into activity. Key stakeholders include parents, schools, councils, sporting and fitness organisations, all of whom can play an important role in transitioning girls from consideration to trial and activity adoption.

The developmental research also identified a need for mixed and integrated media channels for messaging, with a strong focus on television, You Tube, and social media. The most popular social media platforms amongst this cohort of girls was Instagram (following, more aspirational), Facebook & Twitter (commenting and sharing), and Snapchat.

Creative development – how did Girls Make Your Move come about?

Towards the end of the developmental research discussions an existing physical activity television advertisement from Sport England's This Girl Can campaign was introduced as stimulus to generate discussion on different potential executional approaches.

The importance of diversity

For the advertising to be credible and relevant to young women in the target audiences, a strong emphasis on achieving inclusion through depicting diversity is important. For this campaign in particular, diversity needs to be multi-faceted, involving:

- ethnic diversity (to reflect the diverse range of racial backgrounds that girls see in their schools and communities);
- a wide range of activities – individual as well as team sports, and range of non-sport forms of physical activity. This is important in order to make the advertising relatable to girls in segments 3 and 4 in particular, but also 5, for whom the notion of sports participation is 'all or nothing'; and who in the research described "other girls" as the "sporty girls".
- inclusive of the broad range of Australian settings, but with a particular focus on outdoor settings and inclusion of some water-based activities;
- depict a range of girls' body shapes and sizes, in contrast to the sports/active wear advertising to which they are exposed.

Relatability, through diversity in these ways, became the underlying premise for the development of the Girls Make Your Move advertising creative.

Other considerations:

The developmental research also recommended that advertising materials:

- include talent that look authentic and “real” – including being red faced and sweaty, and showing a defiant disregard for the gaze of others as they are doing their activity;
- Depict ‘easy ways in / back to exercise’ with an emphasis on enjoyment, having fun with friends, trying rather than winning, and special moments of hilarity or triumph that reminds girls of the most salient benefits of being active;
- Be uniquely Australian, and exclusively for girls.

Given the age and gender of the target audience, there were also findings that require care in developing the campaign:

- Take care not to use music, phrases or imagery that sexualise girls, aiming for ‘sassy’ not ‘sexy’;
- Avoid tapping into benefits around ‘how you look’ rather than ‘how you feel’;
- To maximise relatability include a careful balance of body sizes and avoid the unintended message take-out that the campaign is about weight loss;
- Take care as to how becoming sweaty during exercise is positioned – girls in the research proffered that being physically active during the Australian summer is undesirably synonymous with getting uncomfortably hot or sweating, and this currently works as a strong disincentive. The communications could re-frame and normalise red faces and looking sweaty as a manageable or positive part of having fun and feeling good, without drawing unnecessary attention to it. Depictions of real girls having fun getting sweaty without criticism or self-consciousness may help to neutralise this barrier.
- Communications to be timed for early in the year, when motivations and new year’s resolutions to get healthy are stronger, and school routines and structures can potentially enable re-commitment to participation as friendship groups re-form and recruitment to structured sport (inside and outside school) takes place. At the same time, the advertising should not focus overly on structured sport, and provide a variety of “ways back” to activity that are easy and accessible for disengaged girls.
- Consider the potential unintended impact of the campaign on young males.

5. Audience response to campaign creative

Iterative waves of Girls Make Your Move creative testing

A staged approach to concept testing was conducted with the less active and engaged segments 3 and 4 (and to a lesser extent segment 5). Advertising materials for television, print, online videos, social media and out of home were developed and tested over three waves of research via focus groups with the primary target segments of low/inactive girls from the less interested/motivated segments 3, 4 and to a lesser extent 5.

Research explored reactions and determined preferences for a range of executional elements for the campaign materials, including the campaign brand (Girls Make Your Move), the music, the call to action and final selection of activities, cast and supers.

Materials were refined as the waves of testing iterated to ensure that final materials resonated strongly with primary target segments, in terms of:

- Core advertising effectiveness measures of novelty (surprise and captivation), emotion (empowering and motivating) and personal relevance;
- Self-reflection, motivation and correct call to action;
- Minimising self-exclusion through the depiction of diversity at many levels (race, body size, ability, type of activity and setting);
- Impact on secondary and unintended audiences (through testing with boys, parents and teachers).

The song and its lyrics were highly motivating and contributed to the successful impact of the TVC

The overall response to the TVC and the accompanying materials suggests that the campaign is well placed to deliver the campaign messages in a highly engaging, memorable and motivating way. The overwhelming target audience reaction upon seeing the final materials was one of encouragement, empowerment and 'activation' – a determination to think about and plan to increase their involvement in physical activity.

Methodology details

The research was conducted by TNS Social Research in four stages, comprising:

- **Developmental research**, to inform the campaign strategy, messaging, executional direction and channels. In the latter part of the group discussions and interviews television commercials from similar campaigns including Sport England's This Girl Can campaign were used as stimulus to generate discussion on different executional approaches.
- Three successive waves of **concept testing and refinement research** were undertaken, each informing the further development of the material to optimise its appeal, resonance and impact on the target audience.

An overview of the methodology for each stage of the study appears below:

The formative research was conducted with girls 12-19 years of age, segmented on the basis of their school year, activity levels (skewed to those less active), Indigenous and Culturally and Linguistically Diverse backgrounds, metro and rural locations and Socio-Economic Status. Methods included:

- Friendship pairs and trios who attended affinity groups of n=8-9 girls;
- In-home and in-facility family immersion interviews – predominantly mother/daughter but also included father/daughter and siblings. Participants were interviewed separately, and together as a family unit;
- An extended online discussion forum with mothers of 15-18 year old girls, and in parallel 15-18 year old unrelated daughters, run over 4 days.

Additionally, the formative stage included focus groups with teachers and with community, school and elite sports coaches.

Concept testing was conducted in three iterative waves, via focus groups of n=8 girls 15-18 years of age, primarily from the less engaged segments 3 and 4, and to a lesser extent segment 5. Groups were also structured to include girls from Indigenous and Culturally and Linguistically Diverse backgrounds, and from metro and rural locations.

- Wave 1 consisted of six groups with girls from segments 3 and 4, and was used to determine the selection of the campaign brand (Girls Make Your Move), the music, and to narrow preferences for supers, casting and treatments. One focus group was dedicated to online and social media behaviours and messaging;
- Wave 2 consisted of 12 groups: 9 with segments 3 and 4, one group with segment 5, and additionally one group with mothers of teenage girls, and one group with boys in school year 11 and 12. This wave of groups was used to test and further validate the selection of music and the brand, and to test reactions to the pre-finished filmed TVC;
- Wave 3 consisted of 6 groups of girls in segments 3 and 4, and was used to finalise selections for voice overs, supers and new social media and online video materials.

Over the four stages, research was conducted in Sydney, Perth, Melbourne, Brisbane, Bendigo, Adelaide, Newcastle and Maroochydore from November 2015-February 2016.

ABOUT TNS

TNS Social Research has more than 500 dedicated social researchers working across 40+ countries. We are recognised as the research partner inspiring the world's leading policy makers by providing action-oriented analysis and recommendations based on evidence. Each year we conduct millions of interviews through a range of quantitative and qualitative methodologies to help our clients understanding and track public opinion on a local and international level. We assist decision markers across public sector and government bodies; the media, non-government organisation and major international and national institutions; with specialist expertise in disadvantage, education, health, social services, environment, workforce, family, public transport, justice, immigration and community integration.

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