

Understanding and Knowing our Market

Consumer Segmentation





ASA Insight

The ASA's newly created Insight Team has big ambitions. We want to be a central influence on the ASA's decision-making through providing a greater understanding of the swimming market in England.

By increasing our understanding of the depth and breadth of the market, we will build the value of our communications and products through ongoing collaboration with our stakeholder groups, such as operators and clubs.

In this way, the Insight Team plays a critical role in identifying how the ASA can meet consumer requirements. Our focus is to ensure swimming plays a part in more people's lives to increase activity levels and, ultimately, improve the health and fitness of the nation.

If you would like to know more about us, please contact ASA Insight by emailing ASAinsight@swimming.org



Meet the team

(From left to right)

Lily Bond – Research Officer

Chris Sykes – Senior Statistician

Damian Stevenson – Head of Insight

Kerry McCaughie – Insight Manager

All rights reserved. The content of this publication is, unless otherwise indicated, © of the ASA and may not be reproduced, translated or distributed in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without prior permission obtained in writing from the ASA.

All images © Georgie Kerr unless stated otherwise

ASA consumer segments

As part of the ASA's strategic plan, the ASA Insight Team have been tasked with understanding the swimming market through better knowledge of the consumer (swimmers) and non-swimmers alike.

A segmentation exercise took place in 2014 to reveal seven types of individuals in relation to their attitudes and behaviour towards swimming.

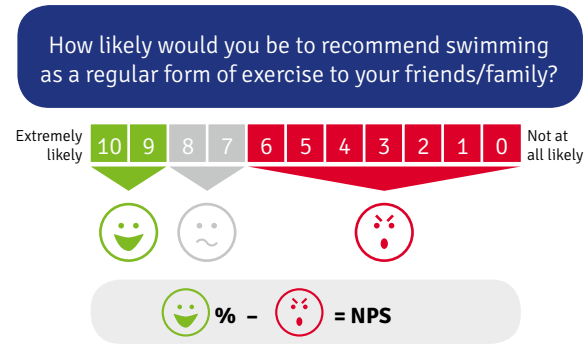
The sample used as the basis for the segmentation is statistically representative of those aged 14 and over in England.

This booklet details the knowledge of the segments gathered so far. We detail their current swimming behaviour and identify how to work with and influence each segment to increase their engagement with swimming.

Table of segments

Page 6	Unmotivated/fearful
Page 8	Active but not confident swimmers
Page 10	Fitness focused
Page 12	Family focused
Page 14	Restorative swimmers
Page 16	Complementing fitness
Page 18	Swimming champions

Net Promoter Scores for each segment have been calculated using the following method:



Developing the segments

Five stage methodological process



Segment: Unmotivated/fearful

37%
of the English
population



17.5m
individuals

2.2m
latent demand

-11
NPS score

Quotes

“Apart from the walking I have to do around school I am not participating in any sport. This is due to me having lots of operations over the last few years, the latest being in April this year when I had operations on both of my feet.”

“To be honest, some of my friends don’t know I can’t swim. I just tell them I don’t like cold water. I’m embarrassed really at my age that I can’t swim.”

Who am I?

My key features

- Few with children living at home
- Higher prevalence of health conditions or impairments such as Type 2 Diabetes, Asthma or Arthritis
- Higher prevalence of lower social and economic groups

My lifestyle

These individuals live life at a fairly slow pace, spending much of their time around the home and garden. Family, including children, partners and grandchildren are their main priority in life. They also enjoy watching TV, particularly soaps, sometimes up to 50 hours per week.

Individuals in this segment are likely to purchase supermarket clothing and electrical products. They do the majority of their shopping at ASDA, more so than the general population and show a greater affinity for LG electrical products.

My physical activity

Deteriorating health has caused them to be less active than they used to be, impacting on both their motivation and perceived ability. Inertia (and perceived lack of confidence) are also preventing them from being more active.

My media consumption

Individuals within this segment are likely to use all forms of social media regularly, more so than the general population average.

What swimming means to me

Whilst there are some positive holiday memories of swimming, fear and anxiety is now associated with it. This could be from having a fear of being in water, or simply finding swimming too much effort to enjoy the experience.

Individuals in this segment either cannot swim or are weak swimmers; which for some is an embarrassment and increases their anxiety.

Limited exercise and swimming over recent years has led to a lack of self-belief in their ability to swim or learn how to swim.

Make me active (through swimming)

Barriers around fear and lack of confidence need to be addressed. Tapping into the opportunity swimming presents to spend time with family and improve health will also help to motivate this segment.

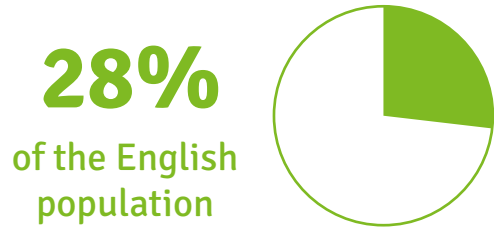
Working with local community activators (e.g. Women’s Institute/Dementia Friends) to engage this segment can work well. Individuals in this segment need encouragement every step of the way, from packing their swimming bags, to travelling to the facility, and finding a session which is appropriate for them.

How to get me swimming (more)

Training staff at the facility how to deal with fearful and unconfident swimmers is essential to provide this segment with the encouragement and support they need to get into and enjoy the water.

One to one teaching sessions following the ASA Adult Swimming Framework will give these segments the encouragement and support they need to enjoy the swimming experience.

Segment: Active but not confident swimmers



13m
individuals

1.2m
latent demand

-18
NPS score

Quotes

“I’m keeping myself fit and healthy as I live alone and want to remain independent and active for as long as I am able.”

“The point is, it’s got to be fun and enjoyable to get over the embarrassment, and we’ve got to feel we’re all in it together.”

Who am I?

My key features

- Skew to post family; children have left home and many are grandparents
- Higher prevalence of health conditions or impairments such as Type 2 Diabetes and Arthritis

My lifestyle

These individuals keep busy by packing lots into their daily life. They prioritise looking after their family and maintaining their health, but their hobbies and personal interests play a key role in their life.

Active but not confident swimmers show a greater affinity to Morrison’s supermarket, Nokia technology and Dove.

My physical activity

They are interested in improving their health; this can include either their overall level of fitness or addressing specific health issues.

This segment is fairly active, participating in a variety of physical activities; walking, exercise classes, Pilates and walking the dog.

My media consumption

Individuals within this segment are less likely to use social media regularly than the general population. However they do enjoy reading newspapers such as the Daily Mail and The Independent, particularly the money and domestic news sections. They watch TV, specifically the news and weather updates and enjoy listening to the radio stations such as Classic FM.

What swimming means to me

They recognise the potential benefits of swimming as having a positive impact on health as well as being able to spend time with family, but fear and anxiety are present. This could be from having a fear of being in water, or simply finding swimming too much effort to enjoy the experience.

Individuals in this segment lack confidence in their swimming ability and are often embarrassed that they cannot swim. They are also not confident with the way they look in swimwear.

However, they are more open to the idea of swimming to keep healthy than the Unmotivated/Fearful segment.

Make me active (through swimming)

It is essential to provide this segment with the encouragement and support they need to improve their confidence. If the activities are fun and enjoyable, their confidence will increase and overcome the feeling of embarrassment.

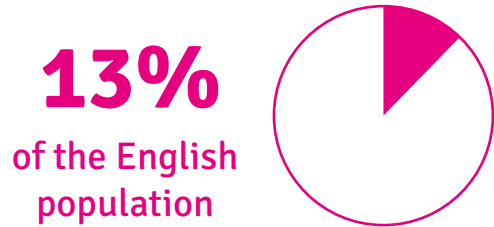
Swimming can be highlighted as a way of spending quality time with family members; especially with children or grandchildren.

How to get me swimming (more)

Ways to increase their confidence in their ability may include drop-in clinics at the swimming pool with an ‘activator’ rather than a swimming teacher.

The ASA’s Adult Learn to Swim Framework would be of interest to this segment as a way to help them improve their technique and learn new skills, increasing their confidence in the water.

Segment: Fitness focused



5.9m
individuals

0.8m
latent demand

-8
NPS score

Quotes

“My exercise programme works on strength and conditioning six days a week. Monday-Saturday with Sunday off. I love everything about the gym. I love bettering myself and seeing the improvements I make every day.”

“I did a triathlon and that got me swimming, but I stopped once it was over.”

Who am I?

My key features

- Skew to pre-family or early family life stage
- More likely to be male
- Tend to be affluent individuals

My lifestyle

They aim to balance the important things in life; family, friends, leisure, work and keeping active.

This segment has a higher proportion of shoppers in Waitrose than the general population. Other brands of preference include Odeon, Cineworld and Apple.

My physical activity

Staying fit is important to this segment so they exercise regularly. They enjoy setting goals and seeing improvement through their exercise. Both looking good and feeling good, for many, were motivating factors that encouraged them to begin exercising.

My media consumption

Regular social media use is high within this segment, particularly the use of Facebook and Twitter. Within this segment, there is a preference for broadsheet readership; The Guardian. Fitness focused individuals are likely to watch TV via on demand services such as iPlayer and 4OD and do so on their laptop or desktop.

What swimming means to me

Enjoy swimming on holiday but when at home swimming feels like both a hassle and a chore to fit into their busy routines. Compared to other sports, the time and effort involved in preparation is off-putting.

They can swim and are confident in water, but do not associate swimming with real fitness goals as it lacks

structure and a sense of achievement.

Frustration with a lack of lane discipline and busy pools are additional barriers, impeding this segment's fitness.

Make me active (through swimming)

These individuals dip in and out of swimming; the fitness opportunities in swimming need to be identified to encourage a more sustained behaviour. Fitness focused individuals are seeking a clear structure and goals that they can work towards to gain a sense of achievement.

Educating this segment on the benefits of swimming to develop their fitness, physical appearance, ability and skills is necessary to change their current perceptions.

How to get me swimming (more)

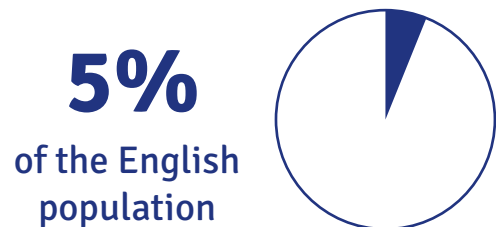
Swimathon, charity swims and triathlons are examples of motivators. The use of technology to record swimming activity and improve their skill set will appeal to this goal-orientated segment.

A tailored programme for the pool which builds on their existing fitness programme would encourage individuals in this segment to exercise in the pool and overcome the perception that lane swimming is boring. Swimming equipment which uses the same muscles as those worked on in gym environments would appeal to them.

Operators should explore how swimming can be an added value to the membership packages offered to this segment. Additionally, swimming should be promoted as a fun activity, playing on the social element to off-set the perception of swimming as boring.

This segment are more likely to swim weekend afternoons and tend to avoid weekday morning swims.

Segment: Family focused



2.2m
individuals

0.6m
latent demand

+28
NPS score

Quotes

“Most of my spare time is taken up with ferrying my five children to their extra-curricular activities which includes swimming lessons / life saving club (RLSS), amongst other things.”

“I have bought a swim card which means I just have to get my card stamped. As I have my hands full with the baby and bags, I normally put our swimming costumes on under our clothes so it is stress free.”

Who am I?

My key features

- Individuals in their 30s and 40s, with children at home
- Few with health conditions or impairments

My lifestyle

Family life is a full time job; this segment prioritises their family, so they have limited free time to exercise. They are likely to use Tesco as their main supermarket and use it's clothing line F&F. They have a greater propensity to be Nintendo, PlayStation and Google play customers, on behalf of their children.

My physical activity

Daily activities are mainly for their children's benefit. Various activities may 'own' times of the week, e.g. football on a Saturday morning.

My media consumption

Individuals in this segment are more regular social media users than the general population. This segment is likely to use their tablet or smartphone as a second screen while watching TV, for shopping and checking social media.

Whilst printed news is less likely to be consumed, this segment does enjoy family and parenting magazines, along with celebrity and gossip magazines.

What swimming means to me

Swimming is associated with spending quality time with their family. It's about having fun all together, seeing their children enjoy themselves as well as teaching them a vital life skill.

However swimming is not currently part of their family schedule and tends to be on an ad hoc basis (i.e. school holidays, occasional weekends).

They may feel discomfort at irritating others in the pool with their children.

Make me active (through swimming)

Swimming can be perceived as hassle as it requires a lot of preparation. Convenience is key for this segment.

Encourage this segment to 'find their swimming moment' by sharing their positive memories of swimming, as they are 20% more likely to recreate that experience; sharing quality time with their family.

How to get me swimming (more)

Swimming needs to become part of their family schedule. Encouraging facilities to offer structured sessions for parents to get involved in whilst their children are in Learn to Swim lessons will allow this segment to have some 'me time'.

Learn to Swim providers also need to look at keeping children engaged and learning along the Learn to Swim Pathway so families can visit the pool more frequently and swim together as a family.

Family focused individuals seek 'stay fit as a family' memberships allowing them to continue spending quality time together whilst being active.

Saturday and Sunday mid-mornings are the preferred times to swim as a family, with most being more likely to swim in the spring and summer months.

Segment: Restorative swimmers

6%
of the English
population



2.6m
individuals

1.0m
latent demand

+44
NPS score

Quotes

“As I get older more physical exercise is getting harder to do, so this is a more gentle way of getting exercise.”

“I like going for the occasional swim as it gives a full body workout and can be a gentle, full body exercise. I feel invigorated afterwards and calm.”

Who am I?

My key features

- Typically pre-family or early family life stage, but these individuals can be of any life stage
- More likely to be female
- Tend to be affluent individuals
- Whilst there is a higher concentration of individuals in their teens and 20s, this segment includes people of all ages

My lifestyle

These individuals spend much of their time juggling lots of activities and commitments, including home, work and family time.

More likely to shop at Waitrose and Lidl, use Apple and Vodafone products and are more likely to visit Boots on the high street than the general population.

My physical activity

Many individuals in this segment have health challenges and try to look after themselves and stay fit and healthy through moderate exercise.

They have replaced higher impact activities which they can no longer participate in due to deteriorating health with low impact exercise (such as gardening and walking); and use these to either address their health issues or as a way to prevent future ones.

My media consumption

The Guardian and Metro are newspapers of preference for this segment, specifically articles relating to food and drink, and arts and culture. Restorative swimmers are likely to use on demand TV services particularly BBC iPlayer and ITV player.

What swimming means to me

Restorative swimmers enjoy the time that swimming allows them to relax and de-stress. It provides them with some important ‘me time’ in their busy lives as it’s an enjoyable, low impact exercise.

Swimming is strongly associated with maintaining and building their overall health, but barriers to swimming do exist. These individuals may experience some elements of physical discomfort from pool water, e.g. chlorine, sore eyes and water in the ears.

Make me active (through swimming)

Tapping into the benefits of swimming around maintaining holistic health will help to sustain and increase the regularity of their swimming behaviour.

How to get me swimming (more)

A tailored programme in the pool to suit the needs of this segment would encourage individuals to exercise in the pool and allow them to enjoy their ‘me time’ without being disrupted by a crowded busy pool.

Additionally, operators and facilities need to look at improving and maintaining the cleanliness of their swimming pool, to recreate the ‘spa’ feel that these individuals prefer. Evening sessions with dimmed lights and relaxing music would appeal to this segment and provide them with the restorative benefits that they require from exercise.

Weekday mid-mornings, afternoons and evenings are the preferred times to swim, due to them generally being quieter sessions. Weekend swimming is avoided by this segment. Swimming is enjoyed at all times of year, but particularly the spring and summer months where some take up open water swimming.

Segment: Complementing fitness

5%
of the English
population



2.3m
individuals

0.5m
latent demand

+5
NPS score

Quotes

“I am increasingly conscious about how I lead my life so I set a good example, and I also exercise and eat healthily to make sure I am here for a long time!”

“I felt so much better as the stresses of the day drifted away and I felt a sense of pride and achievement.”

Who am I?

My key features

- Whilst there are individuals from all ages in this segment, there is a high concentration of those in their teens and 20s
- More likely to be female
- Few with children
- Tend to be affluent individuals

My lifestyle

Family, friends and keeping active are important to this segment; living well, ageing well and setting a good example are the key motivations for their lifestyle.

Brand affinity includes Holland and Barrett, Cadbury, Garmin and supermarket fashion brands and clothing.

My physical activity

Staying healthy and active is important to this segment, participating in weekly exercise, for example ice hockey, running and gym sessions.

My media consumption

As regular social media users, 76% of this segment use Facebook. They have a greater propensity to keep up to date on news via their tablet or smartphone than the greater population.

What swimming means to me

Swimming is associated with an overall contribution to their fitness; it's great for weight loss and is an enjoyable low impact exercise. It also allows them to relax and de-stress from their busy lives.

Complementing fitness individuals go swimming when the opportunity arises, as they do not tend to have a scheduled time for swimming. Instead they often swim

to complement their existing fitness routine; after the gym, when away on business or with friends at the weekend.

When participating with others, swimming provides a valuable chance to socialise and have fun with their friends and family.

Some individuals within this segment experience barriers around body image and feeling self-conscious.

Make me active (through swimming)

There are lots of activities competing for their time which also provide the same benefits as swimming. Whilst this segment does tend to understand the benefits of swimming, other sports are seen as more convenient, which is an important factor for them. As they often have time constraints, promoting swimming as a convenient activity will encourage more of these individuals to increase their swimming frequency.

Educating this segment on the benefits of swimming to develop their fitness and physical appearance is necessary to encourage them to choose swimming over other sporting activities.

How to get me swimming (more)

Leisure facilities need to promote various sessions which may appeal to, and fit within, these individuals' time constraints. Afternoon swims, particularly on a Saturday, will be of interest, whilst lane swimming and Swimfit sessions will appeal as activities within the pool.

Segment: Swimming champions

7%
of the English
population



3.4m
individuals

1.0m
latent demand

+58
NPS score

Quotes

“Important things in my life are family and friends, my swimming and keeping fit, my job. My free time is spent swimming, meeting up with friends and family and relaxing at home”

“I’m not a particularly competitive person but I find that I’m pretty competitive against myself – I’m pretty good at pushing myself in training and I get a great deal of satisfaction from it.”

Who am I?

My key features

- Skewed towards those who are either older (55+ years) or younger (especially those 14-15 years old)
- More likely to be female
- More likely to have Arthritis

My lifestyle

Individuals in this segment lead active lives, balancing work, family and social commitments.

This segment likes to buy fresh food more than the general population and Lidl and Aldi tend to be their supermarkets of choice. They are keen travellers who favour brands including Gatwick Airport and TripAdvisor.

My physical activity

This is an active segment, with individuals who are driven to achieve and goal focused.

Whether these individuals are training for events, competing to beat previous times or focused on improving their fitness, they are highly motivated.

My media consumption

Swimming champions are likely to read travel, health and food/cooking magazines more than the general population. They are more likely to listen to the radio as their main news source and listen to Radio 4.

What swimming means to me

These individuals swim regularly, experiencing a range of benefits. Swimming helps these individuals to look good; providing muscle tone and body conditioning. Swimming also provides a chance for them to feel good, relax and re-energise. Many individuals see swimming as a chance to socialise, either chatting in the changing rooms or having a catch up afterwards in the café.

They often schedule swimming into their week and stay committed to their swimming schedule.

Make me active (through swimming)

We need to sustain their behaviour and stop them from lapsing by learning from their motivations to swim and leveraging them. Improving our knowledge about the enjoyment of swimming for these individuals will help the ASA and leisure operators to apply this learning to other segments, with the aim of moving them along the behaviour change journey towards advocacy.

This segment has strategies in place that keep them swimming week after week including individual competitiveness (recording personal bests, achieving goals or by entering events that require training) and having a social commitment (swimming with a friend and not wanting to let them down).

Individuals in this segment prefer to swim on weekday mid-mornings and late evenings.

How to get me swimming (more)

Having social areas in the facilities in which they swim will appeal to many in this segment; providing them with the opportunity to socialise after their swim with other like-minded individuals. They often like to ‘treat’ themselves after a hard work out, so a café would be the ideal social location.

Swimming clubs bring opportunities for these individuals to compete and also provide a social benefit to swimming. Advertising swimming clubs across facilities will encourage some of this segment to make swimming more of a regular commitment than it may be already and increase their enjoyment of the sport.

Behaviour change journey

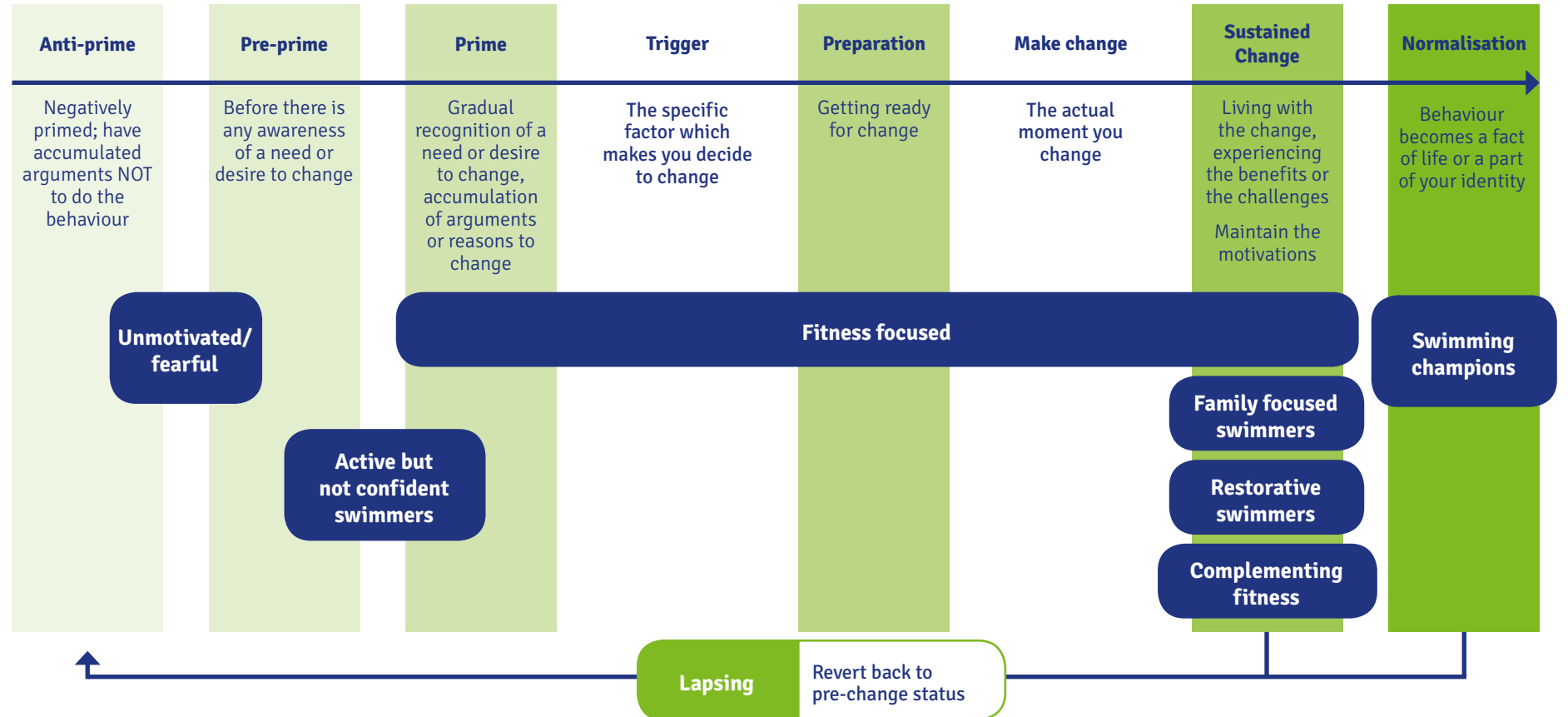
About the journey

All segments sit at various points along the behaviour change journey. The headers on the chart describe the attitude/behaviour of the consumers within each segment.

Consumers can move both up and down the journey at any time, depending on their changing attitudes/behaviours towards swimming.

Through understanding their current behaviour and what could encourage them to increase their swimming participation, we aim to influence their behaviour along the journey towards normalisation. The ultimate goal is to change attitudes of consumers to become advocates of swimming.

By changing their attitude, we aim ultimately to also change their behaviour.



Influencing the behaviour change journey through insight towards advocacy

Coming in 2015

Our next step in understanding the swimming market involves conducting further research to discover how best to influence people's attitudes and behaviours towards swimming.

We aim to discover how best to influence each segment along the customer journey.

For non-swimmers or those swimming infrequently, the research will highlight how we can a) start to build swimming as a 'habit' in their routines and b) make swimming a greater part of their lives.

For those swimming on a weekly basis, it will demonstrate how to a) build and encourage their advocacy, b) prevent them from 'churning' away from swimming and c) work with them to recruit other consumers via word of mouth recommendations.

The ASA would like to incorporate the views of Aquatic Officers and leisure operators on how best to create products and messages that can be delivered in pools across England. Should any Aquatic Officers or operators be interested in contributing to this research from February to April 2015, then please contact us at ASAinsight@swimming.org.





Pavilion 3, SportPark, 3 Oakwood Drive, Loughborough University, Leicestershire LE11 3QF
Tel: 01509 618700 | Fax: 01509 618701 | www.swimming.org