



# WORLD CHILDREN'S DAY 2022

FIFTYFIVE5'S TOPLINE INSIGHTS FOR UNICEF › OCT 2022

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# METHODOLOGY AND SAMPLING

<p><b>METHOD</b></p>	<p><b>N=1,006 parents of children aged 3-17</b> completed a <b>15-minute</b> online quantitative survey. A further <b>n=1,000</b> parents of children aged 3-17 completed a <b>5-minute</b> version of the online quantitative survey. Respondents could complete the survey via any device.</p> <p>The sample was sourced from <b>The Digital Edge (TDE)</b> Australia general population panel.</p> <p>The <b>survey flowed</b>: screener, activity engagement, benefits and barriers to engagement, issues impacting the household, and demographics.</p>
<p><b>SAMPLING FRAMEWORK</b></p>	<p>To ensure a final sample that is <b>robust and representative</b> of parents with children aged 3-17 years, we set quotas for age x gender and location (state and metro/regional).</p> <p>These quota targets were based on the <b>incidence and profile of parents of children aged 3-17 years</b> amongst a large nationally representative sample, according to <b>2016 ABS Census data</b> on age, gender and location.</p> <p>Other parent, family and household demographics were allowed to <b>fall-out naturally</b> (e.g. household income, number of children and their ages/genders, working status).</p> <p>The total sample was <b>weighted</b> using the same targets once we had completed fieldwork, to ensure the total final sample was representative of parents of children aged 3-17 years in Australia.</p>
<p><b>FIELDWORK TIMINGS</b></p>	<p>Fieldwork for the main 15-minute survey was conducted from <b>19<sup>th</sup> Sept to 6<sup>th</sup> Oct 2022</b>. The fieldwork for the shorter 5-minute survey was conducted from <b>11<sup>th</sup> to 23<sup>rd</sup> Oct 2022</b>.</p>

NOTE: any sums not adding up to 100% throughout this report are due to rounding decimal places

## QUOTA TARGETS (AND WEIGHT TARGETS)

AGE x GENDER*	MALE	FEMALE	TOTAL	LOCATION	METRO	REGIONAL/RURAL	TOTAL
18-24	1.1%	1.1%	2.2%	NSW	20.1%	11.8%	32.0%
25-34	9.7%	13.7%	23.4%	VIC	18.8%	6.2%	25.0%
35-44	20.0%	23.1%	43.0%	QLD	9.3%	11.2%	20.5%
45-54	14.1%	12.6%	26.7%	SA	5.6%	1.5%	7.1%
55+	3.5%	1.2%	4.6%	WA	8.9%	2.3%	11.2%
<b>TOTAL</b>	<b>48.3%</b>	<b>51.7%</b>		TAS	1.0%	1.0%	2.0%
				NT	0.5%	0.2%	0.7%
				ACT	1.6%	0.0%	1.6%
				<b>TOTAL</b>	<b>65.8%</b>	<b>34.2%</b>	

\*Non-binary and different termed genders were allowed to fall-out naturally (n=3 in the combined total sample)

WORLD CHILDREN'S DAY NOVEMBER 20





# SAMPLE PROFILE (WEIGHTED)



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## FALL-OUT OF PARENT DEMOGRAPHICS AND FAMILY TYPES

		Of the main sample n=1,006	Of the combined sample n=2,006
<b>AGE GROUPS</b>	18-29	72	117
	30-34	165	312
	35-39	204	415
	40-44	230	469
	45-49	173	369
	50-54	110	219
	55+	52	105
<b>GENDER</b>	Man or male	456	849
	Woman or female	549	1154
	Non-binary/not specified	2	3
<b>STATE</b>	NSW	326	652
	VIC	252	512
	QLD	211	398
	WA	102	212
	SA	74	149
	TAS	22	41
	ACT	14	31
	NT	5	11
<b>METRO/REGIONAL</b>	Metro	671	1355
	Regional	335	651
<b>REGION</b>	Major Cities of Australia	749	1503
	Inner Regional Australia	185	363
	Outer Regional/Remote/Very Remote Australia	72	140
<b>CULTURAL IDENTIFICATION</b>	Identify as Aboriginal and/or Torres Strait Islander	104	148
	Identify as speaking another language	144	271
	Identify as belonging to an ethnic group other than Australia	348	632
<b>HOUSEHOLD INCOME</b>	< \$80k	300	528
	\$80k - \$150k	404	812
	> \$150k	220	456
<b>EMPLOYMENT STATUS*</b>	Employed full time	541	541
	Employed part time	150	150
	Casual/Contractor/Temp/Looking for work	81	81
	Business owner/Sole-traders/Self-employed	48	48
	Not employed, not looking for work	26	26
	Homemaker/household responsibilities/Carer	150	150
<b># CHILDREN</b>	One child	312	556
	More than one child	694	1450
<b>FAMILY TYPE</b>	Pre-school family	254	588
	Primary school family	317	620
	Secondary school family	388	719

SECTION 1

# TOPLINE INSIGHTS

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# AROUND 1 IN 5 PARENTS RANK SPORTS/PHYSICAL ACTIVITIES AS THE ELEMENT MOST ESSENTIAL TO THEIR CHILD’S DEVELOPMENT, ALONG WITH SOCIAL/PLAY

RANKED IMPORTANCE OF ELEMENTS ESSENTIAL TO CHILDREN’S DEVELOPMENT

RANK POSITION OF SPORTS/PHYSICAL

#2

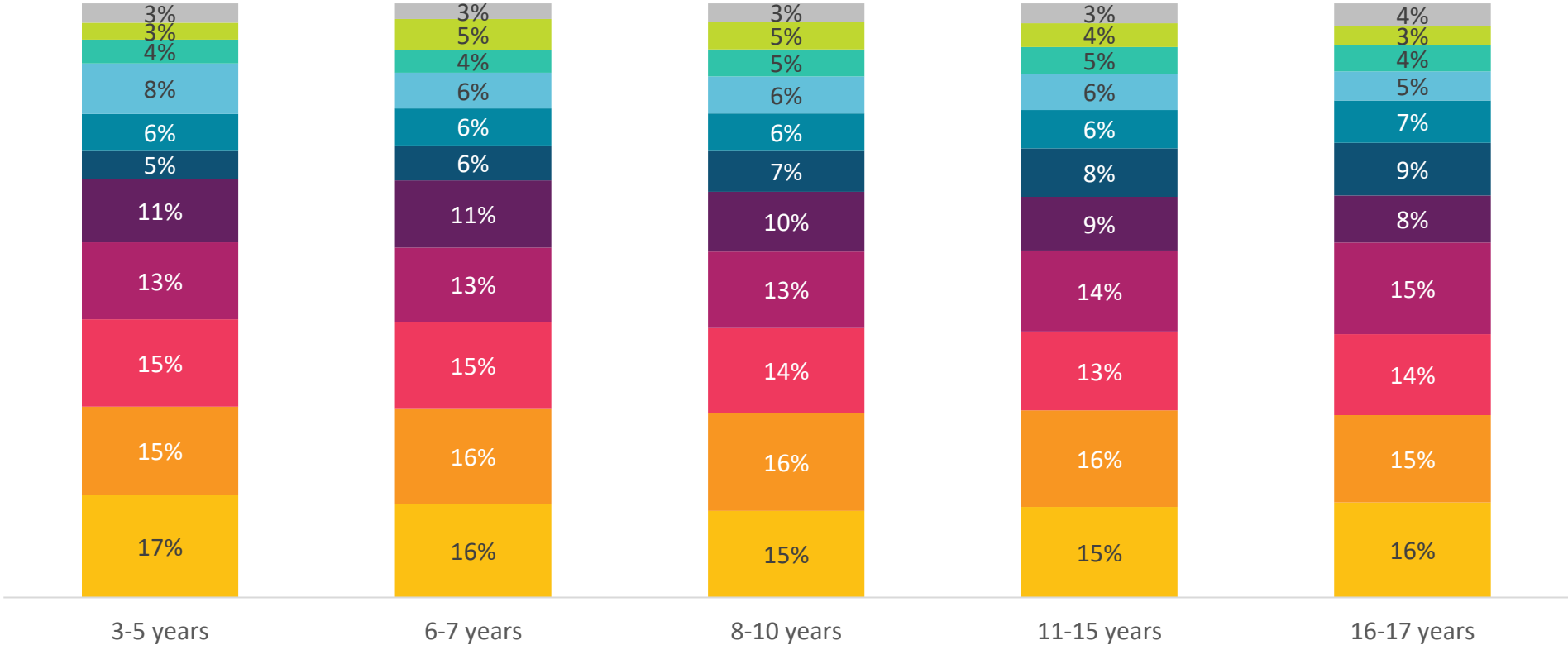
#1

#1

#1

#3

- Drama activities
- Religious activities
- Cultural or language activities
- Art activities
- Music activities
- Community activities
- Numeracy activities
- Self development activities
- Reading, literacy activities
- Sports/physical activities
- Social/play activities



# THERE IS A RAFT OF BENEFITS FOR KIDS/TEENS WHEN THEY PARTICIPATE IN SPORTS/PHYSICAL ACTIVITIES OUTSIDE SCHOOL, BEYOND PHYSICAL FITNESS

## BENEFITS OF CHILD PARTICIPATING IN SPORTS/PHYSICAL ACTIVITIES OUTSIDE SCHOOL

		3-5 years	6-7 years	8-10 years	11-15 years	16-17 years
Physical fitness	63%	59%	62%	65%	65%	68%
Teamwork and leadership	51%	51%	44%	52%	52%	59%
Socialisation	50%	53%	48%	52%	49%	57%
Physical development or support	45%	42%	48%	48%	46%	45%
Social development or support	44%	45%	39%	44%	44%	43%
Sportsmanship	40%	37%	42%	40%	40%	36%
Gross motor skills	31%	39%	40%	34%	30%	20%
Behavioural development or support	28%	36%	32%	29%	26%	23%
Psychological or mental development or support	28%	33%	26%	29%	29%	26%
Emotional development or support	28%	30%	24%	29%	28%	29%
Academical development or support	11%	10%	11%	10%	11%	10%
Other	0%	1%	0%	0%	0%	0%
Not sure	2%	1%	3%	2%	2%	3%

# ORGANISED SPORTS/PHYSICAL ACTIVITIES ARE COMMONLY ENGAGED IN BY KIDS/TEENS; SOCIAL/PLAY ACTIVITIES MORE COMMON FOR 3-5 YEARS (BUT LIKELY PHYSICAL IN NATURE)

ORGANISED ACTIVITIES ENGAGED IN OUTSIDE OF SCHOOL HOURS IN THE LAST 12 MONTHS

AVERAGE # ORGANISED  
ACTIVITY TYPES ENGAGED IN

2.3

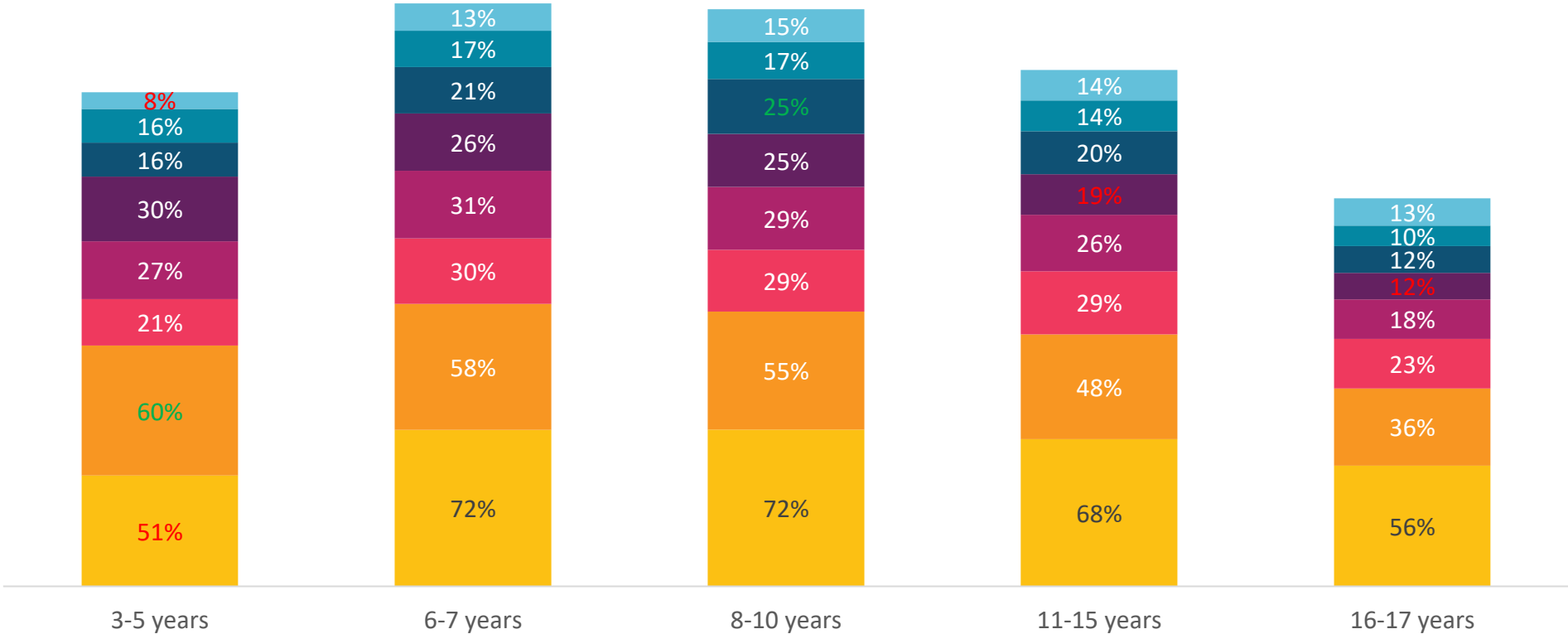
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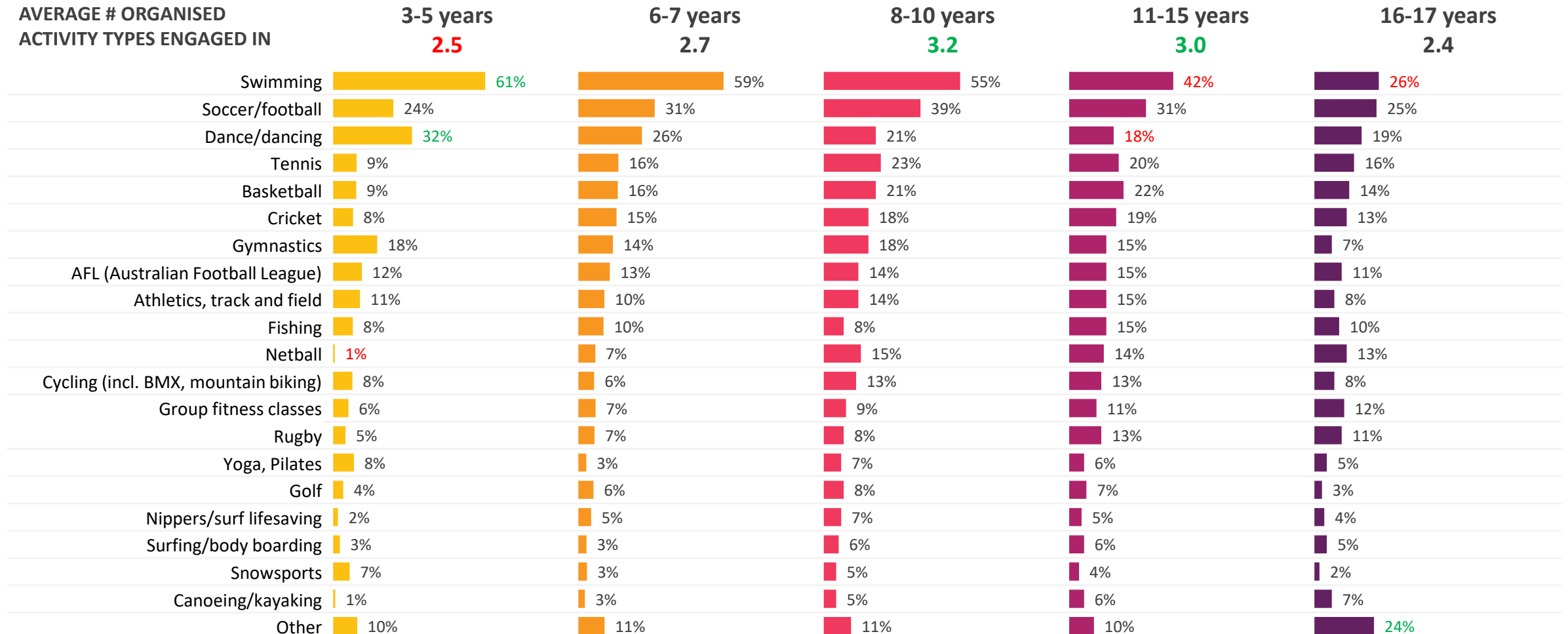
1.8

- Drama activities
- Cultural or language activities
- Religious activities
- Art activities
- Community activities
- Music activities
- Social/play activities
- Sports/physical activities



# KIDS AND TEENS ARE ENGAGING IN 2-3 SPORTS/ACTIVITIES OUTSIDE SCHOOL; SWIMMING IS THE MOST COMMON FOR 3-15 YEAR OLDS

ORGANISED SPORTS/PHYSICAL ACTIVITIES ENGAGED IN OUTSIDE OF SCHOOL HOURS IN THE LAST 12 MONTHS





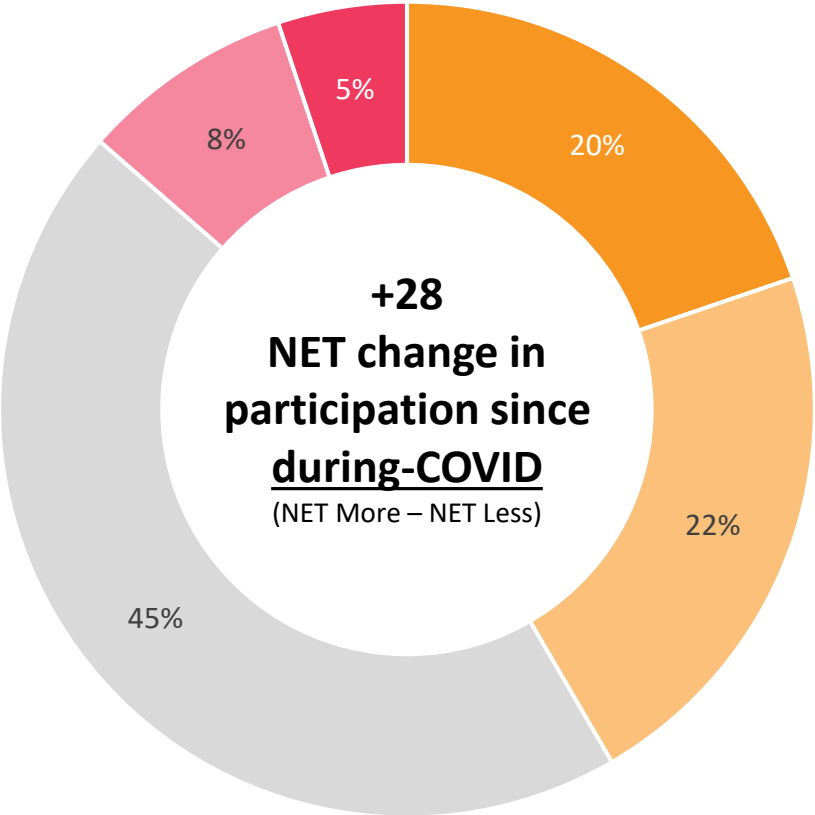
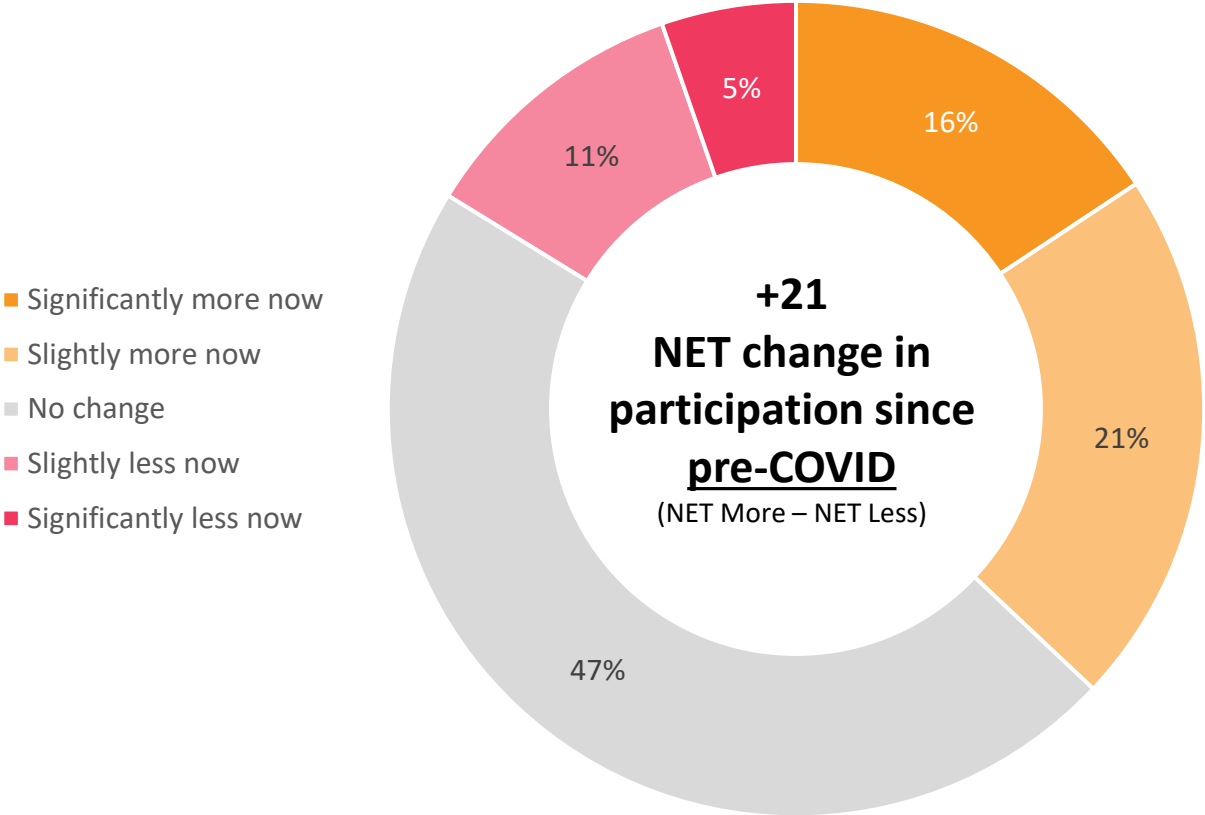
# THERE ARE TWO CORE DRIVERS OF SPORTS/PHYSICAL ACTIVITY: TO SUPPORT PHYSICAL DEVELOPMENT AND BOOST SELF-CONFIDENCE

MAIN REASONS FOR SPORTS/PHYSICAL ACTIVITY PARTICIPATION OUTSIDE SCHOOL  
(PICK TOP TWO)

		3-5 years	6-7 years	8-10 years	11-15 years	16-17 years
To support or enhance physical development	26%	24%	26%	28%	27%	31%
To boost their self-confidence	23%	27%	23%	23%	21%	23%
To support or promote their sporting/physical talents	19%	19%	19%	20%	18%	20%
To help build skills apart from academics	18%	21%	21%	18%	17%	17%
To promote physical achievements	16%	17%	15%	18%	16%	22%
To feel included, part of a group/team/community	14%	13%	16%	15%	15%	11%
To nurture or enhance their social interaction	13%	10%	12%	12%	13%	12%
To support or enhance social or emotional development	12%	13%	12%	11%	12%	10%
To build your child's personality	11%	10%	10%	13%	10%	6%
To nurture the values of teamwork or leadership	10%	9%	8%	9%	12%	10%
To provide learning opportunities	10%	10%	10%	9%	10%	8%
To broaden your child's perspective	8%	10%	8%	7%	8%	11%
To support or enhance psychological development	8%	8%	7%	6%	8%	6%
To help with discipline or behavioural issues	6%	3%	6%	7%	7%	4%
Other	4%	4%	5%	4%	4%	5%
Not sure	1%	1%	2%	0%	1%	2%

# OVERALL, THERE HAS BEEN AN INCREASE IN PARTICIPATION IN SPORTS/PHYSICAL ACTIVITIES SINCE COVID TIMES, AND EVEN COMPARED TO PRE-COVID

PARTICIPATION COMPARED TO PRE-COVID AND DURING-COVID



# THIS INCREASE IS MOST PRONOUNCED IN 3-10 YEAR OLDS

## PARTICIPATION COMPARED TO PRE-COVID BY AGE GROUPS

**NET CHANGE IN PARTICIPATION  
SINCE PRE-COVID** (NET MORE – NET LESS)

**+25**

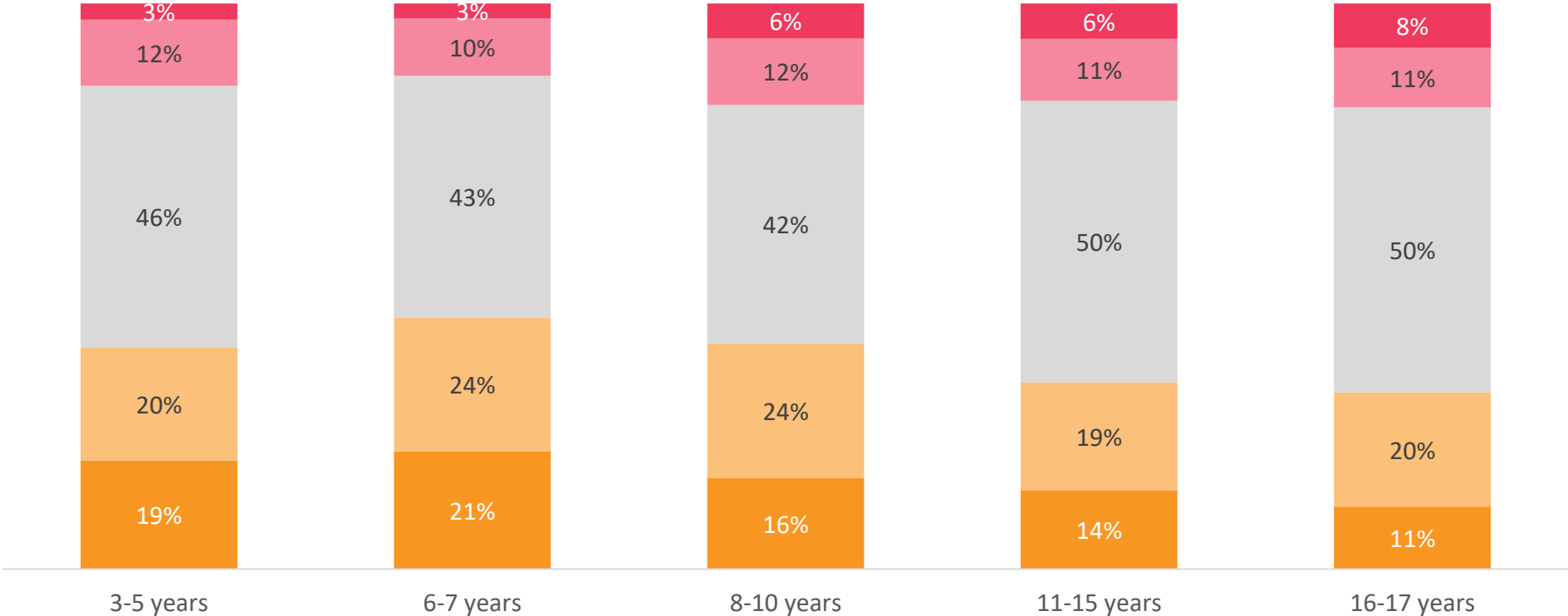
**+32**

**+22**

**+16**

**+13**

- Significantly less now
- Slightly less now
- No change
- Slightly more now
- Significantly more now



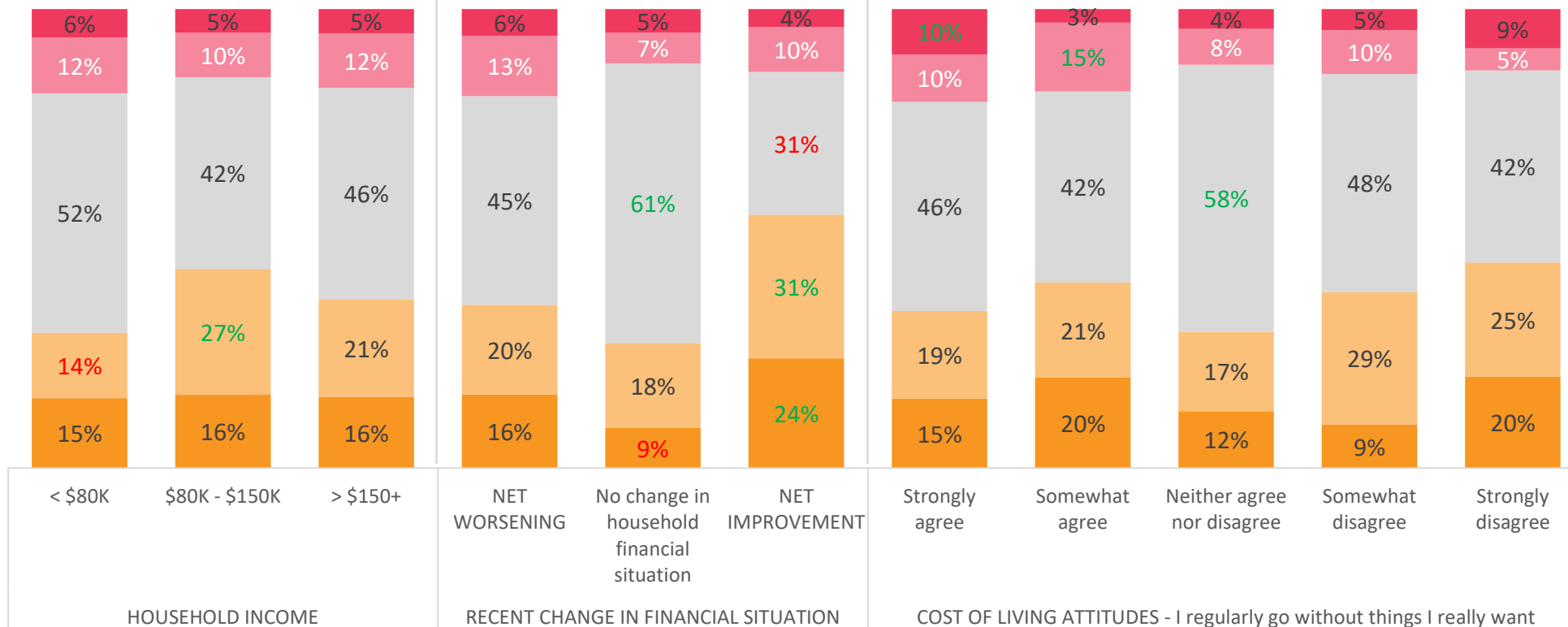
# THIS INCREASE IS MOST PRONOUNCED IN HOUSEHOLDS WHERE FINANCES HAVE IMPROVED, OR WHERE PARENTS FEEL THEY ARE NOT RESTRICTED BY THEIR BUDGETS

PARTICIPATION COMPARED TO PRE-COVID BY HOUSEHOLD INCOME, FINANCIAL CHANGE AND PERCEPTIONS

NET CHANGE IN PARTICIPATION  
SINCE PRE-COVID (NET MORE – NET LESS)

**+11**    **+29**    **+20**    **+17**    **+15**    **+42**    **+14**    **+22**    **+18**    **+24**    **+31**

- Significantly less now
- Slightly less now
- No change
- Slightly more now
- Significantly more now





# INCREASED COSTS HAVE HAD A BIGGER IMPACT ON PARENTS OF YOUNGER KIDS

## REASONS FOR DECREASED ENGAGEMENT (WHERE PARTICIPATION HAS DECREASED)

		3-5 years	6-7 years	8-10 years	11-15 years	16-17 years
Child/children less interested	39%	33%	38%	37%	43%	49%
Increased costs of session	29%	38%	42%	33%	28%	19%
Increased costs of travel/transport to activities	19%	22%	25%	21%	21%	11%
Harder to travel to activities	18%	18%	20%	33%	16%	12%
Less time available for sports/physical activities	18%	21%	20%	24%	18%	13%
Provider/s stopped organising the activity/ies	18%	24%	15%	16%	18%	11%
Child has grown out of extra-curricular sports/physical activities	17%	9%	5%	10%	23%	26%
Activities are harder to access (e.g. long-waiting lists)	16%	23%	22%	18%	11%	9%
Activities are not accessible for all children	12%	22%	8%	9%	11%	11%
Injuries or health conditions	11%	15%	4%	13%	9%	18%
Other	8%	12%	11%	11%	8%	11%
No particular reason, just participating in sports/physical activities less now	6%	2%	4%	10%	5%	6%

# THREE CORE RISKS OF NOT GETTING ENOUGH ACCESS TO SPORTS/PHYSICAL ACTIVITIES: IMPACTED PHYSICAL DEVELOPMENT, SELF-CONFIDENCE AND SOCIAL INTERACTION

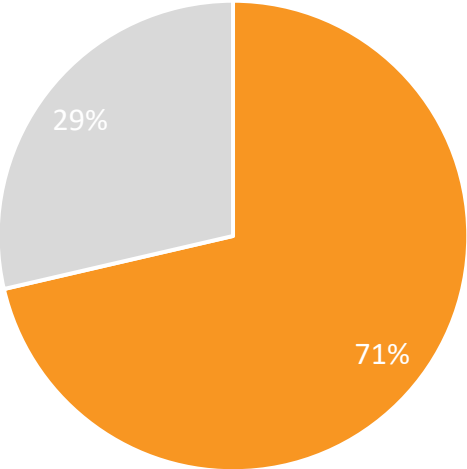
MAIN RISKS OF CHILDREN NOT GETTING ENOUGH ACCESS TO SPORTS/PHYSICAL ACTIVITIES  
(PICK TOP TWO)

		3-5 years	6-7 years	8-10 years	11-15 years	16-17 years
Impacted physical development	26%	25%	24%	30%	27%	32%
Less opportunity to build self-confidence	26%	28%	22%	25%	26%	26%
Less opportunity to develop social interaction	25%	25%	23%	24%	26%	29%
Feeling excluded, not part of a group/team/community	16%	14%	17%	14%	16%	14%
Impacted social or emotional development	14%	13%	16%	17%	12%	13%
Less opportunity to help build skills apart from academics	13%	14%	14%	12%	14%	13%
Less opportunity to nurture the values of teamwork or leadership	13%	10%	9%	10%	13%	12%
Less opportunity to promote physical achievements	12%	13%	14%	11%	11%	11%
Less opportunity to build your child's personality	11%	14%	14%	12%	8%	10%
Limited learning opportunities	10%	11%	11%	9%	9%	5%
Impacted psychological development	10%	9%	10%	11%	10%	9%
Less opportunity to support or promote their sporting/physical talents	9%	8%	9%	10%	10%	9%
Narrowing your child's perspective	9%	8%	9%	7%	10%	6%
Less opportunity to help with discipline or behavioural issues	6%	6%	6%	8%	8%	7%
Other	2%	2%	3%	1%	1%	3%
Not sure	0%	0%	0%	0%	0%	0%

# BUT, THERE'S STILL A DESIRE FOR MORE SPORTS/PHYSICAL ACTIVITY, AT AND OUTSIDE SCHOOL

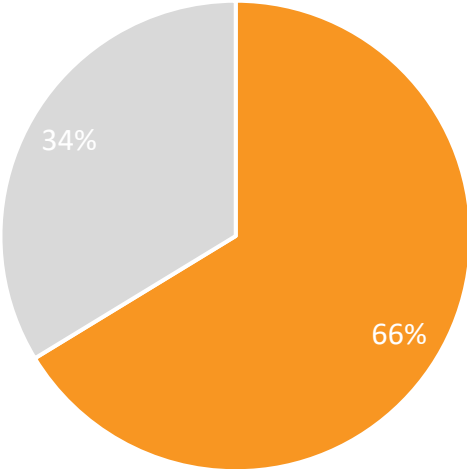
## DEMAND FOR MORE SPORTS/PHYSICAL ACTIVITIES

WOULD YOU LIKE YOUR CHILD TO DO MORE SPORTS/PHYSICAL ACTIVITIES?



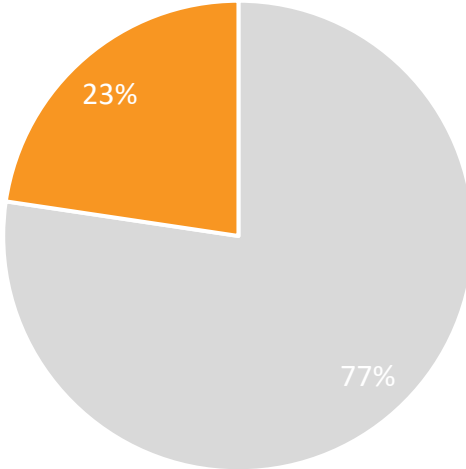
■ Yes ■ No

WOULD YOUR CHILD LIKE TO DO MORE SPORTS/PHYSICAL ACTIVITIES?



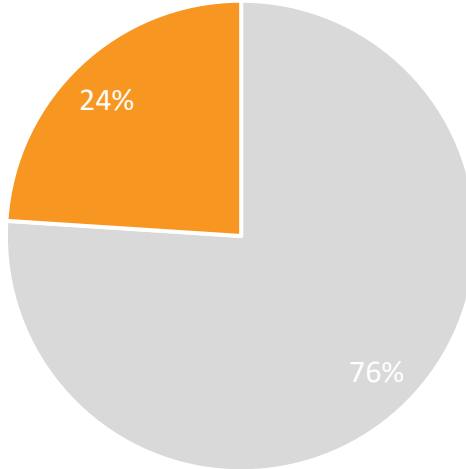
■ Yes ■ No

ARE YOUR CHILDREN GETTING ENOUGH ACCESS TO SPORTS/PHYSICAL ACTIVITIES AT SCHOOL?



■ Yes ■ No

ARE YOUR CHILDREN GETTING ENOUGH ACCESS TO SPORTS/PHYSICAL ACTIVITIES OUTSIDE SCHOOL?

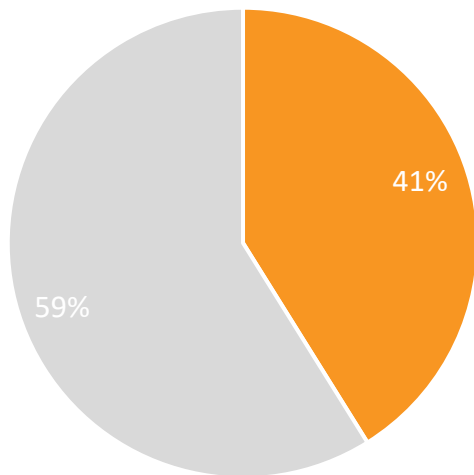


■ Yes ■ No

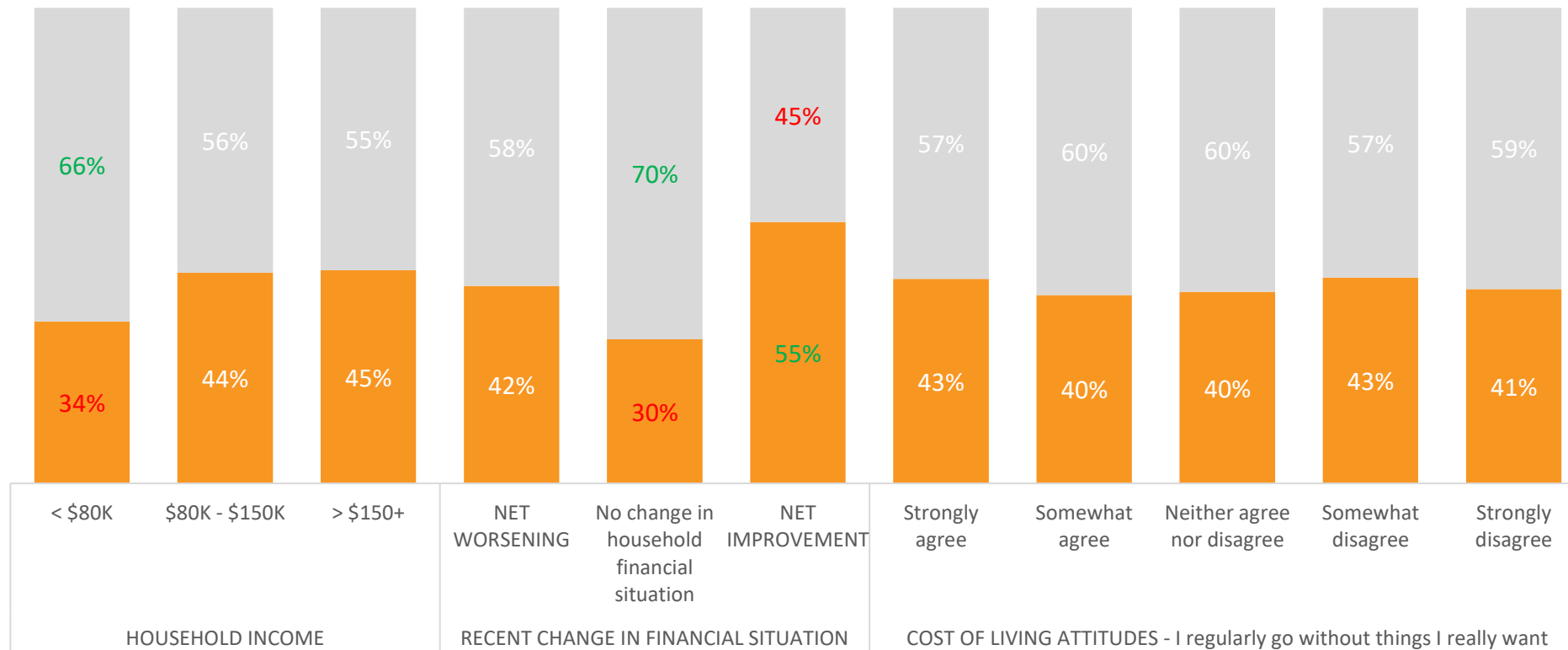
# 2 IN 5 PARENTS HAVE TAKEN THEIR KID/S OUT OF EXTRA-CURRICULAR SPORTS/PHYSICAL ACTIVITIES IN THE PAST YEAR (THIS DOESN'T CORRELATE WITH HOUSEHOLD FINANCES)

EXPERIENCE WITH TAKING CHILDREN OUT OF EXTRA-CURRICULAR SPORTS/PHYSICAL ACTIVITIES IN THE PAST 12 MONTHS

HAVE YOU TAKEN YOUR CHILD/REN OUT OF ANY EXTRA-CURRICULAR SPORTS/PHYSICAL ACTIVITIES OVER THE PAST 12 MONTHS?



■ Yes ■ No





# BUT, THERE IS STRONG ACKNOWLEDGEMENT THAT COSTS DO PREVENT SIGNIFICANT BARRIERS TO ENGAGEMENT, AND TIME

## BARRIERS TO PARTICIPATION IN SPORTS/PHYSICAL ACTIVITY OUTSIDE SCHOOL

		Have taken child/ren out of sports/physical activities	Have not taken child/ren out of sports/physical activities
Costs of sports/physical activities are too expensive	38%	33%	38%
Costs associated with sports/physical activities are too expensive	35%	32%	31%
Costs of travel to sports/physical activities are too expensive	24%	24%	22%
Takes up too much time	23%	21%	27%
Child/children are not interested in sports/physical activity outside school	21%	19%	21%
Too hard to travel to activities, takes too long	20%	22%	17%
Not enough local providers organising activities or have stopped	17%	20%	15%
Child/children is too busy with other activities or ways of spending time	15%	18%	17%
Too hard to access sports/physical activities (e.g. long-waiting lists)	11%	15%	10%
Child/children get enough sports/physical activity at school	10%	15%	9%
Child has injuries or health conditions that mean that can't participate	10%	14%	10%
Child/children feel excluded from sports/physical activities	8%	10%	9%
I'm/partner is not interested in taking child/children to these activities	7%	11%	6%
Sports/physical activities not as important to me/my family/my community	6%	12%	5%
Other	6%	4%	5%
No particular reason, just participating in sports/physical activities less now	9%	5%	11%

# COSTS AND TIME ARE SIGNIFICANT BARRIERS FOR PARENTS OF KIDS THAT ARE DOING SIGNIFICANTLY LESS EXTRA-CURRICULAR SPORTS/PHYSICAL ACTIVITIES NOW

## BARRIERS TO PARTICIPATION IN SPORTS/PHYSICAL ACTIVITY OUTSIDE SCHOOL

		Change in participation compared to <u>pre-COVID</u>				
		Significantly more now	Slightly more now	No change	Slightly less now	Significantly less now
Costs of sports/physical activities are too expensive	38%	30%	33%	37%	36%	54%
Costs associated with sports/physical activities are too expensive	35%	27%	31%	32%	33%	38%
Costs of travel to sports/physical activities are too expensive	24%	24%	21%	25%	21%	20%
Takes up too much time	23%	21%	25%	22%	32%	35%
Child/children are not interested in sports/physical activity outside school	21%	16%	12%	22%	29%	42%
Too hard to travel to activities, takes too long	20%	20%	17%	19%	20%	26%
Not enough local providers organising activities or have stopped	17%	20%	19%	14%	22%	15%
Child/children is too busy with other activities or ways of spending time	15%	20%	17%	15%	21%	17%
Too hard to access sports/physical activities (e.g. long-waiting lists)	11%	10%	19%	8%	16%	15%
Child/children get enough sports/physical activity at school	10%	12%	15%	10%	8%	11%
Child has injuries or health conditions that mean that can't participate	10%	13%	13%	8%	13%	23%
Child/children feel excluded from sports/physical activities	8%	11%	10%	6%	12%	18%
I'm/partner is not interested in taking child/children to these activities	7%	11%	9%	6%	8%	8%
Sports/physical activities not as important to me/my family/my community	6%	11%	11%	6%	5%	2%
Other	6%	4%	5%	5%	3%	7%
No particular reason, just participating in sports/physical activities less now	9%	8%	5%	12%	6%	4%

# MORE THAN 1 IN 2 FAMILIES MUST MAKE SACRIFICES IN THEIR HOUSEHOLD BUDGET TO PAY FOR THE COST OF SPORTS/PHYSICAL ACTIVITIES, OR FACE STOPPING ALTOGETHER

## IMPACT OF COSTS OF SPORTS/PHYSICAL ACTIVITY

NET AGREE

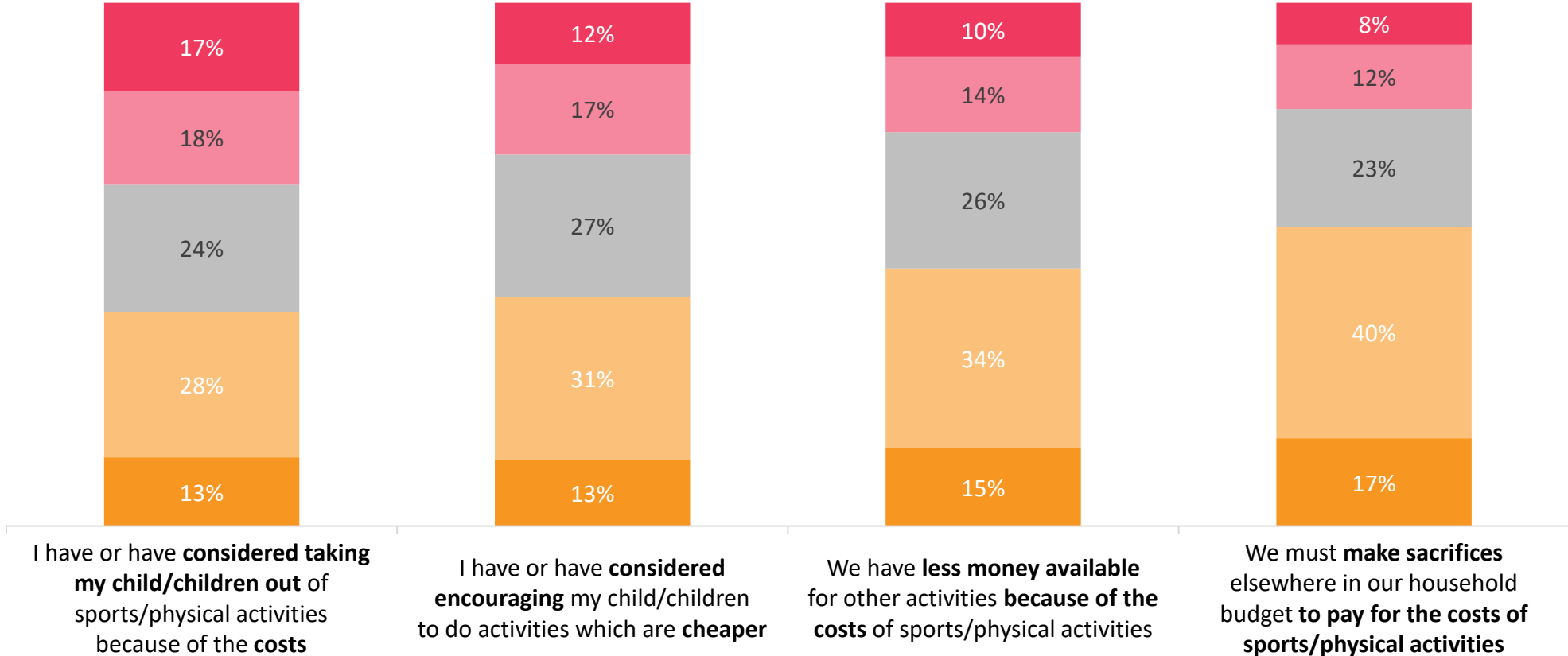
41%

44%

49%

57%

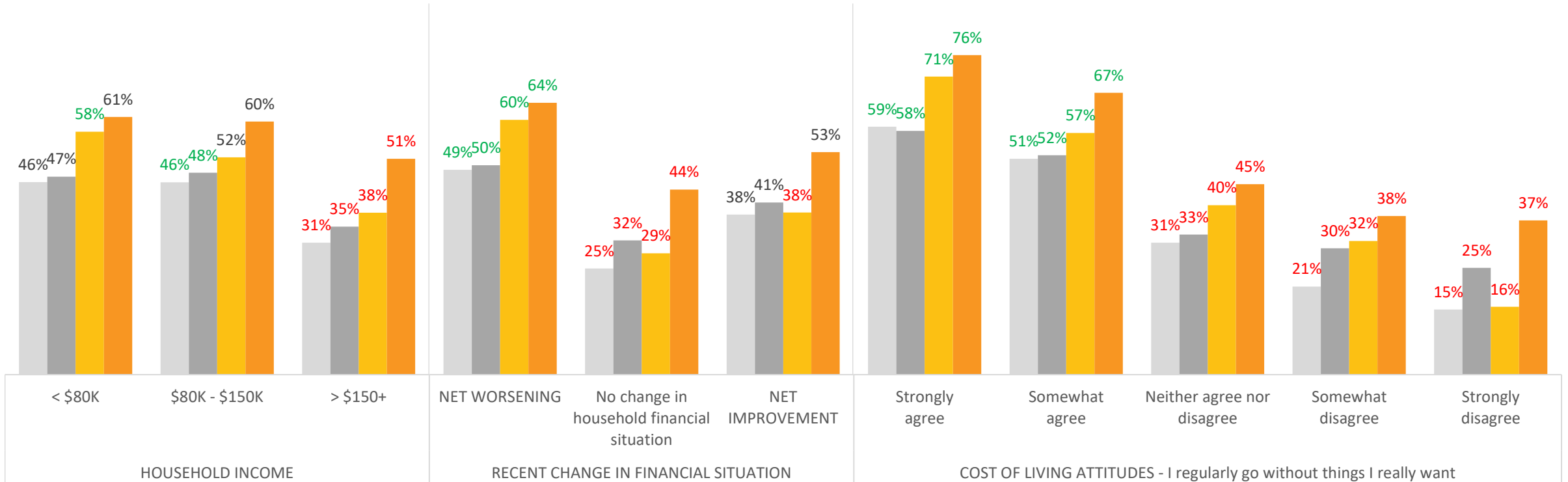
- Strongly disagree
- Slightly disagree
- Neither
- Slightly agree
- Strongly agree



# HOUSEHOLDS THAT REGULARLY GO WITHOUT THINGS THEY REALLY WANT ARE MOST IMPACTED BY THE COSTS ASSOCIATED WITH SPORTS/PHYSICAL ACTIVITIES

IMPACT OF COST OF SPORTS/PHYSICAL ACTIVITY BY HOUSEHOLD INCOME, FINANCIAL CHANGE AND PERCEPTIONS

- I have or have considered taking my child/children out of sports/physical activities because of the costs
- I have or have considered encouraging my child/children to do activities which are cheaper
- We have less money available for other activities because of the costs of sports/physical activities
- We must make sacrifices elsewhere in our household budget to pay for the costs of sports/physical activities



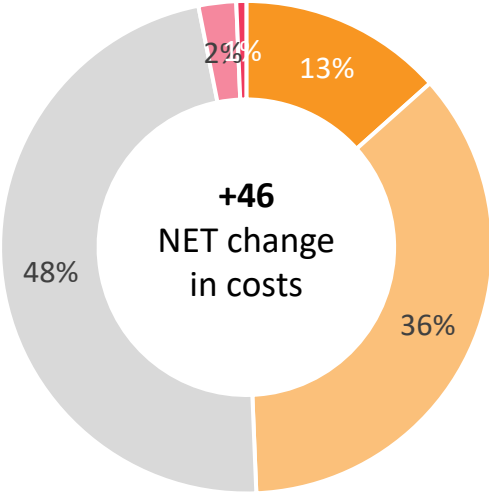


# THERE HAVE BEEN INCREASES IN ALL COSTS ASSOCIATED WITH SPORTS/PHYSICAL ACTIVITIES DONE OUTSIDE THE SCHOOL, ESPECIALLY TRAVEL COSTS

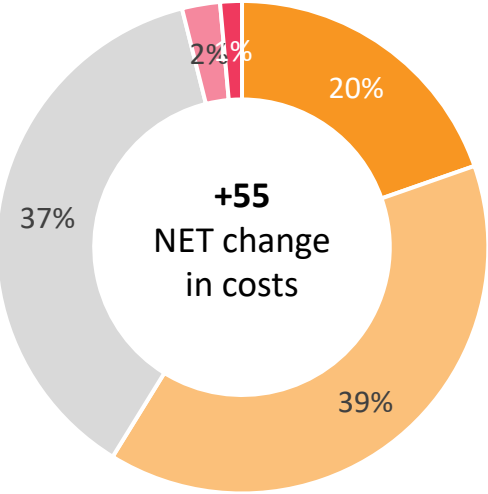
COST CHANGES OVER TIME, AND NET CHANGE IN COSTS (NET MORE – NET LESS)

Average cost per session is \$16, but this varies significantly by the type of sports/physical activity

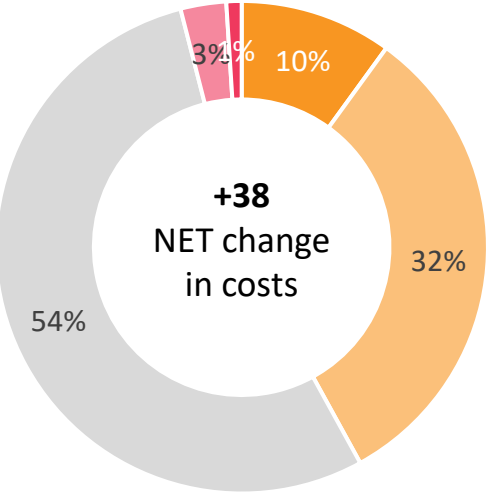
- Significantly more now
- Slightly more now
- No change
- Slightly less now
- Significantly less now



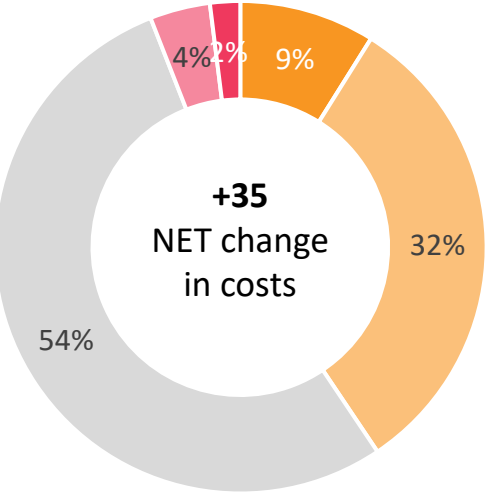
SESSION COSTS



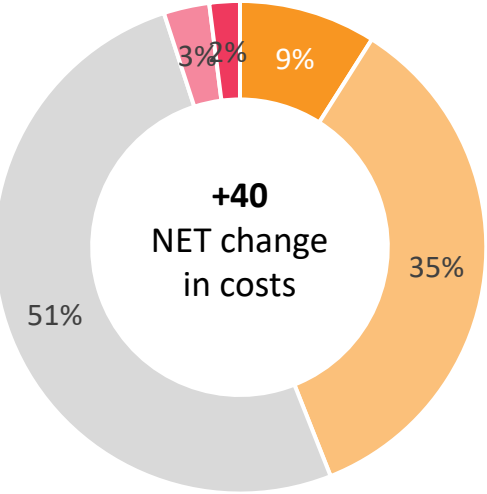
TRAVEL COSTS



EQUIPMENT COSTS



REGISTRATION COSTS

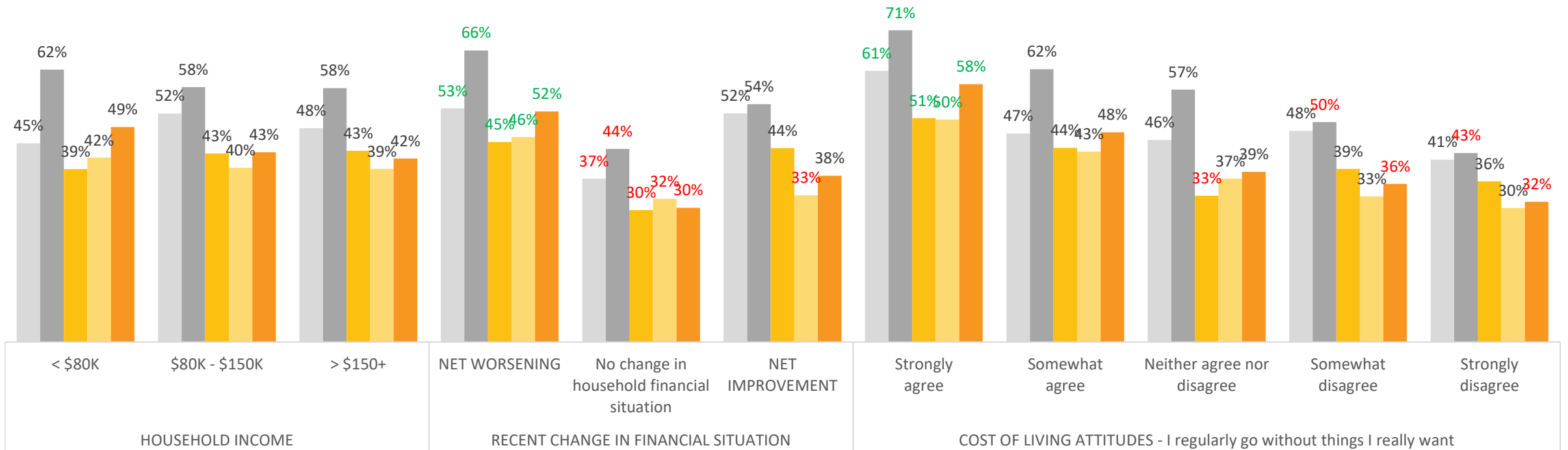


UNIFORM COSTS

# HOUSEHOLDS OF ALL FINANCIAL SITUATIONS HAVE SEEN A COST INCREASE, BUT IT IS MOST NOTABLE AMONGST THOSE THAT ARE ALREADY RESTRICTED BY BUDGET

NET SIGNIFICANTLY/SLIGHTLY MORE NOW BY HOUSEHOLD INCOME, FINANCIAL CHANGE AND PERCEPTIONS

■ Session costs ■ Travel costs ■ Equipment costs ■ Registration costs ■ Uniform costs



# TIME INVOLVED IN EXTRA-CURRICULAR SPORTS/PHYSICAL ACTIVITIES IS ALSO A SIGNIFICANT BURDEN; IT REQUIRES SACRIFICES ELSEWHERE

## IMPACT OF TIME OF SPORTS/PHYSICAL ACTIVITY

NET AGREE

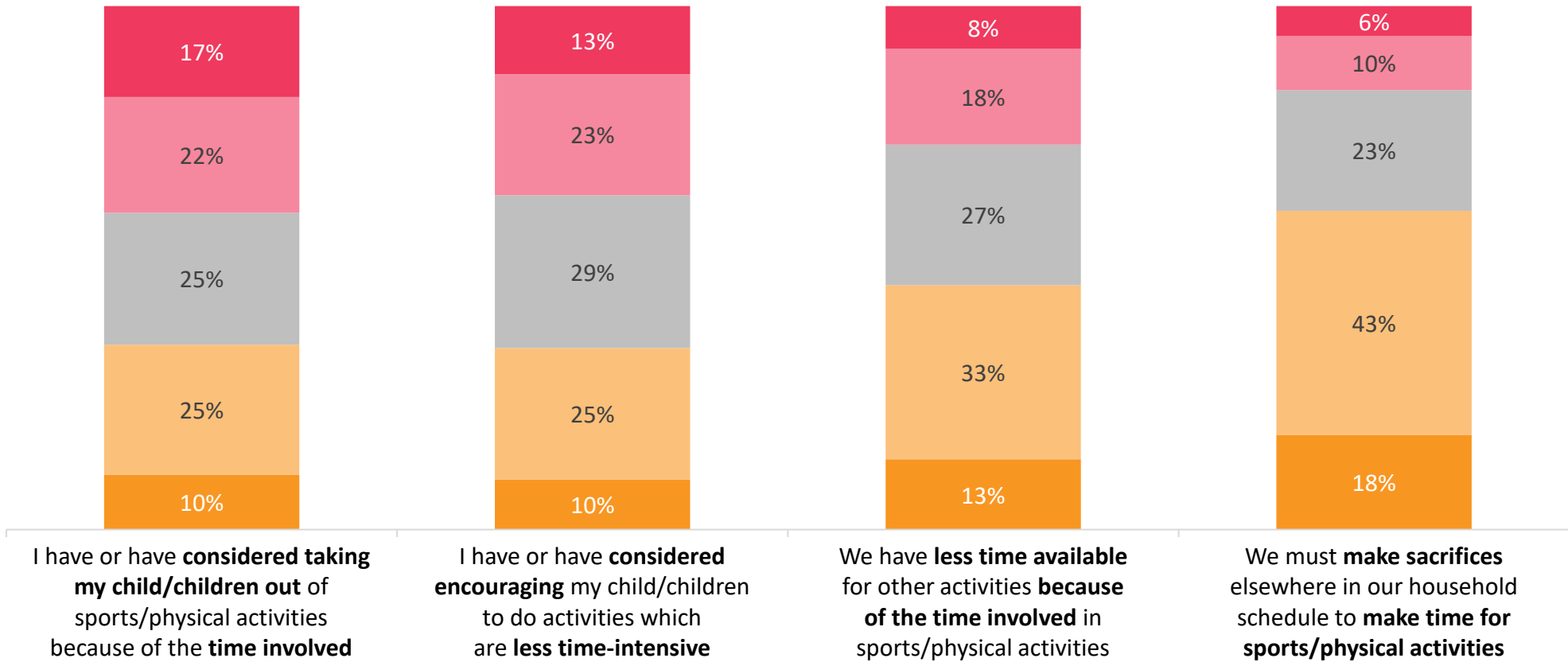
35%

35%

47%

61%

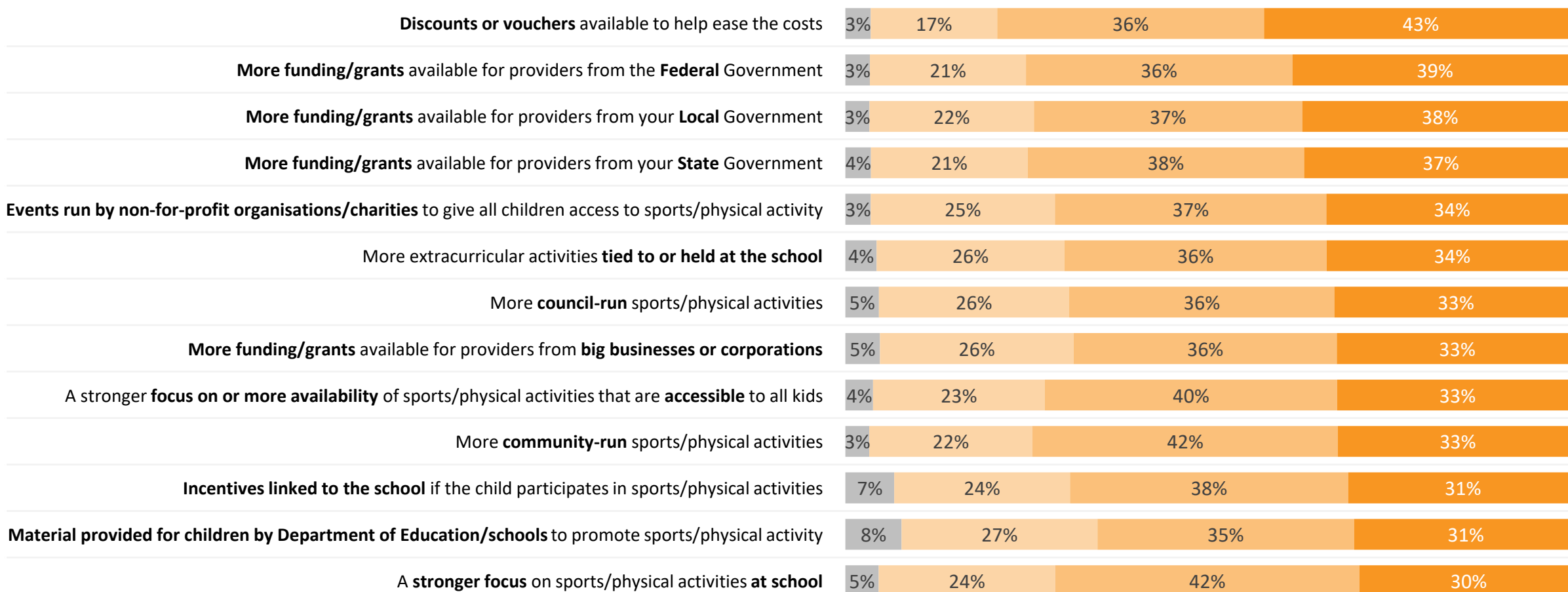
- Strongly disagree
- Slightly disagree
- Neither
- Slightly agree
- Strongly agree



# THERE ARE MANY SOLUTIONS THAT COULD MAKE IT EASIER FOR CHILDREN TO PARTICIPATE IN SPORTS/PHYSICAL ACTIVITY; DISCOUNTS AND GRANTS MOST HELPFUL

## SOLUTIONS TO ENGAGEMENT

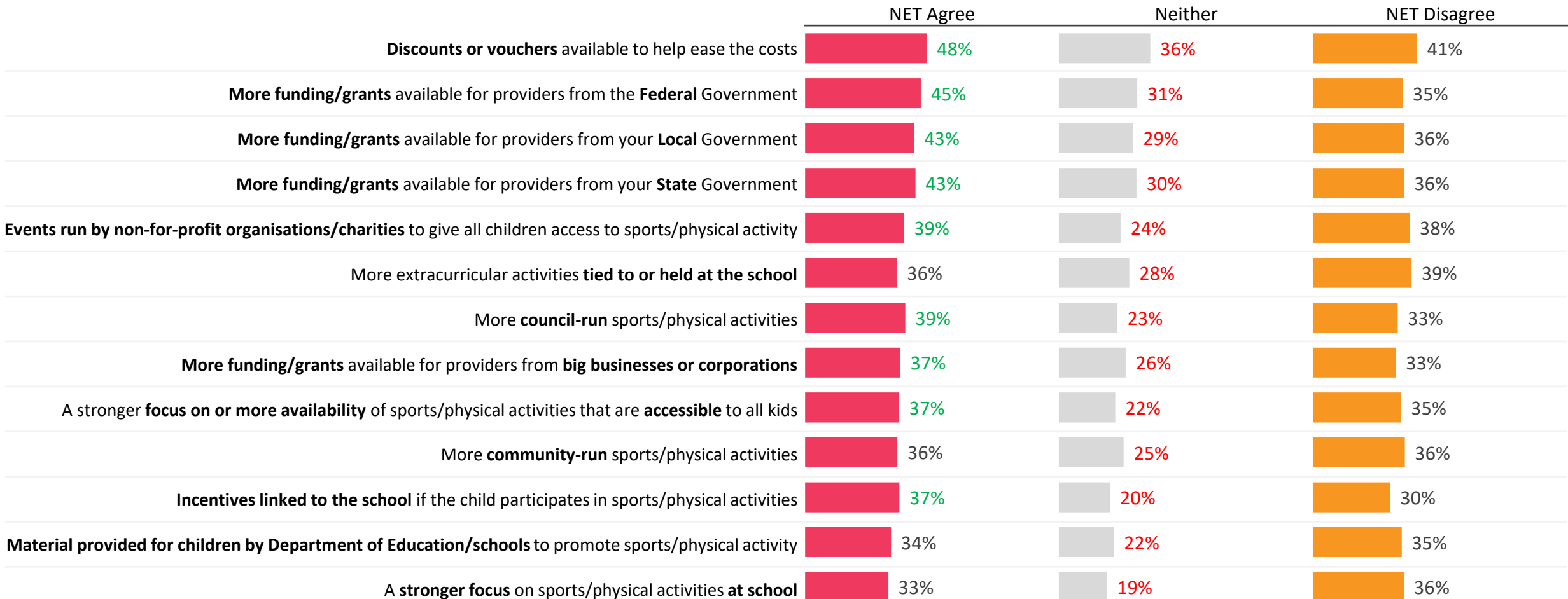
■ Not helpful [Rated 0-3]
 ■ A little helpful [Rated 4-6]
 ■ Somewhat helpful [Rated 7-8]
 ■ Very helpful [Rated 9-10]



# DISCOUNTS AND FUNDING/GRANTS WOULD MOST HELP HOUSEHOLDS THAT HAVE TO MAKE SACRIFICES ELSEWHERE TO PAY FOR THE COSTS OF SPORTS/PHYSICAL ACTIVITIES

SOLUTIONS TO ENGAGEMENT (NET VERY HELPFUL: 9/10]

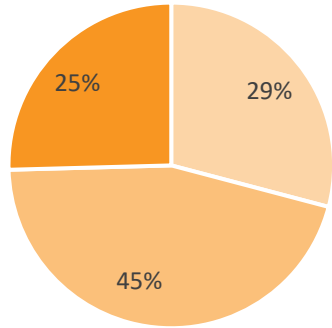
We must **make sacrifices** elsewhere in our household budget to pay for the costs of sports/physical activities



# LET'S HAVE A LOOK AT THE HOUSEHOLD FINANCIAL SITUATION OF AUSSIE PARENTS...

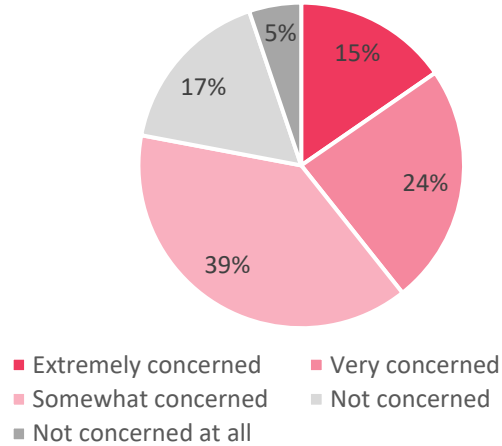
## HOUSEHOLD FINANCIAL SITUATION

### HOUSEHOLD INCOME



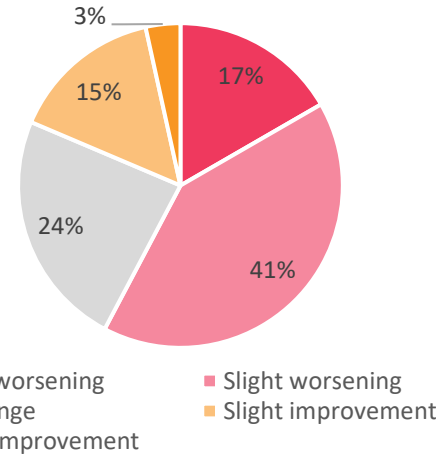
< \$80K   \$80k - \$150K   > \$150K

### COST OF LIVING CONCERN



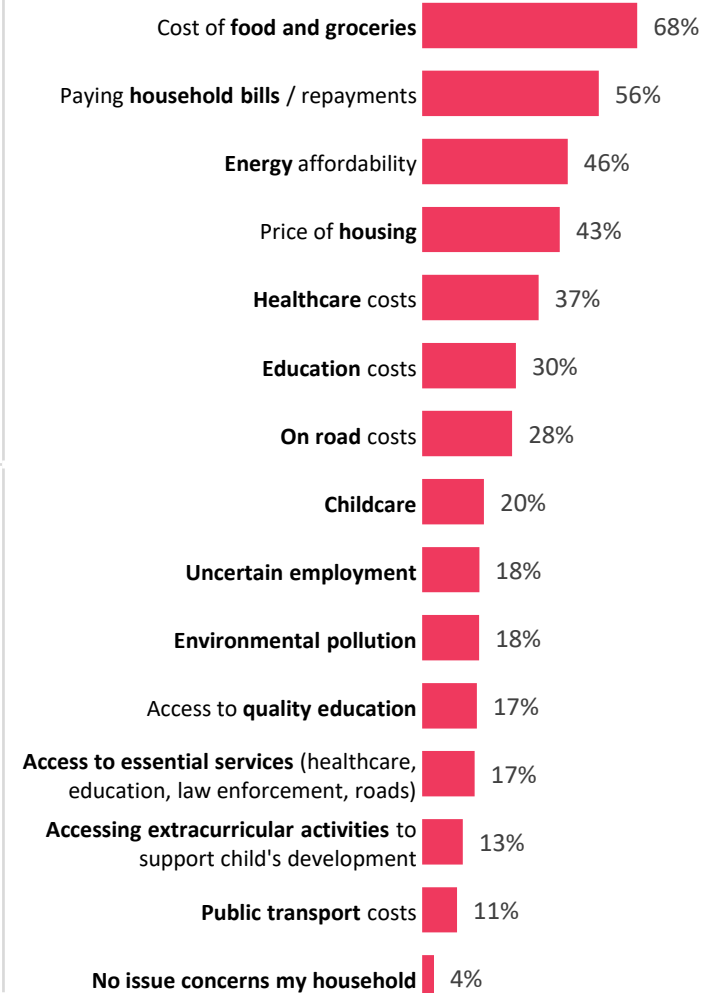
Extremely concerned   Very concerned  
Somewhat concerned   Not concerned  
Not concerned at all

### RECENT CHANGE IN FINANCIAL SITUATION



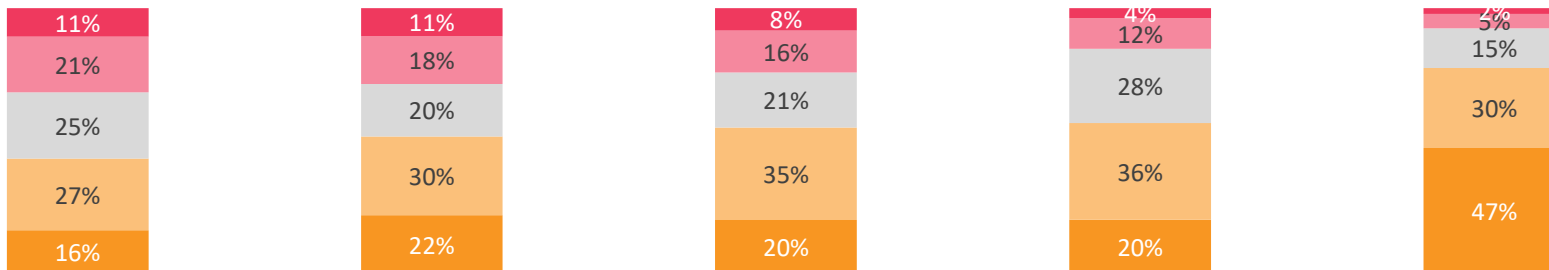
Major worsening   Slight worsening  
No change   Slight improvement  
Major improvement

### ISSUES FACING HOUSEHOLD TODAY



### COST OF LIVING ATTITUDES

Strongly agree   Somewhat agree   Neither agree nor disagree   Somewhat disagree   Strongly disagree



I find it hard to make ends meet and never seem to have enough money

I tend to live pay to pay with little money in reserve

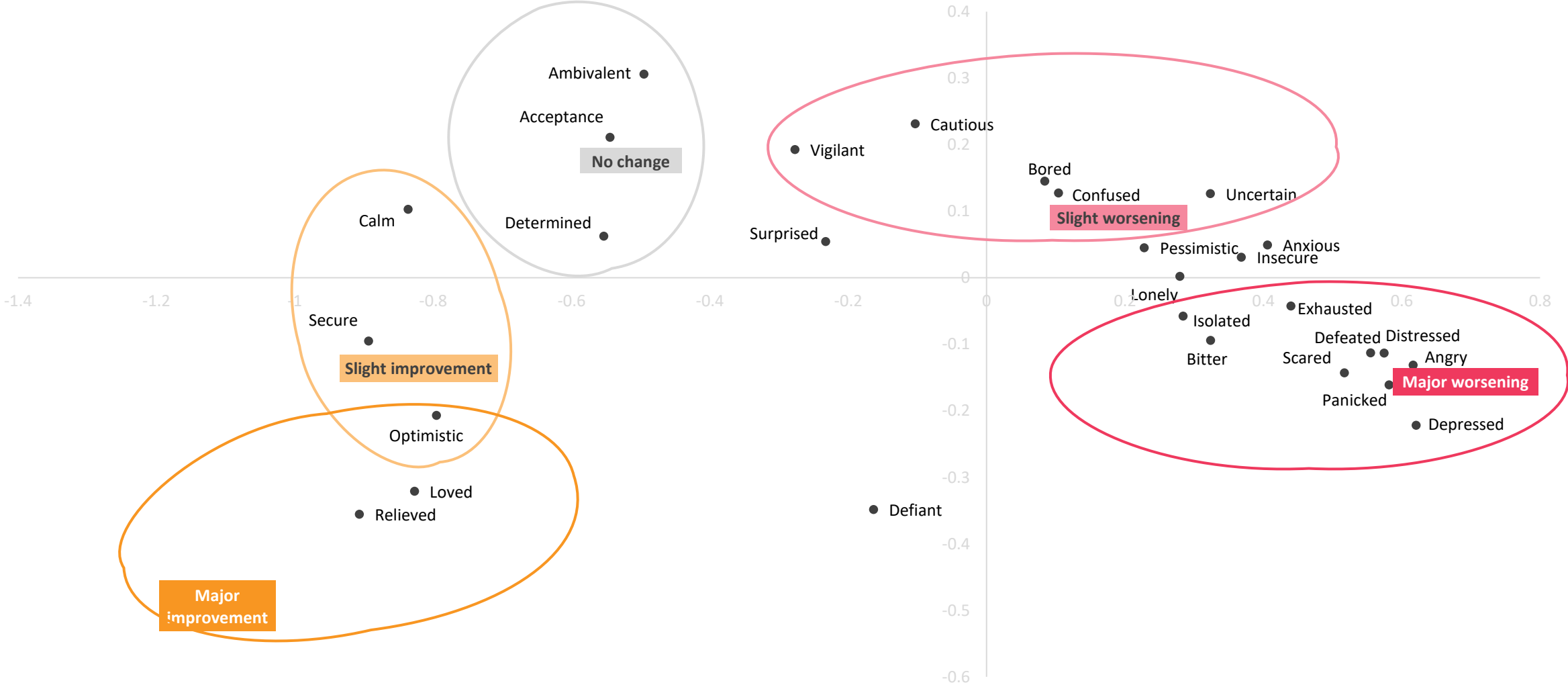
I regularly go without things I really want

There is very little financial support available

My salary doesn't rise at the same rate as cost of living

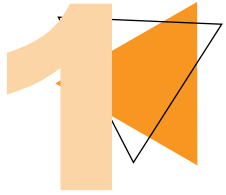
# PARENTS THAT HAVE EXPERIENCED A MAJOR WORSENING IN FINANCIAL SITUATION ARE FEELING SCARED, PANICKED, DISTRESSED, DEPRESSED AND ANGRY

FEELINGS TOWARDS HOUSEHOLD FINANCIAL SITUATION BY RECENT CHANGES IN FINANCIAL SITUATION





# BRINGING IT TOGETHER...



Sport/physical activities are seen as an **essential element to child's development**; it can bring a raft of benefits, beyond physical fitness. It helps **build self-confidence** and **social development**.



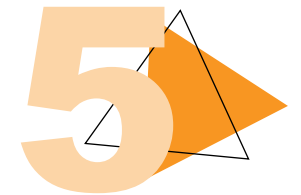
There's high engagement in extra-curricular sports/physical activities (50-60% across age groups), and they're doing about **2-3 activity types** on average. Participation **has gone up** compared to pre-COVID, especially in households that don't feel restricted by budget.



Parents must make **sacrifices elsewhere in their household budgets** to pay for sports/physical activities. At least **2 in 5 households** have had to consider taking their child/children out of extra-curricular sports/physical activities because of the costs involved.



All costs associated with sports/physical activities have gone up over time; most notably session and travel costs. This can have a significant impact on ability to participate; **costs is the biggest barrier to engagement in extra-curricular sports/physical activities** altogether.



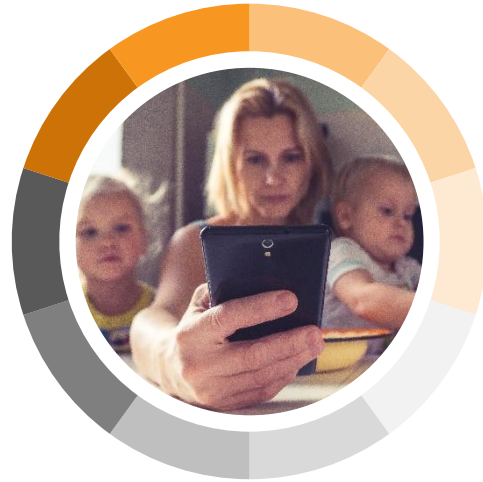
Parents believe there are many solutions that could make it easier for children to participate in sports/physical activity, identifying that **discounts or vouchers** could help the most, especially for households that have to make budget sacrifices to pay for the costs of sports/physical activities.

# PARENTS WANT THEIR CHILDREN TO PARTICIPATE IN SPORTS/PHYSICAL ACTIVITIES, BUT ARE FINDING IT HARDER AND HARDER TO AFFORD IT (WITHOUT SACRIFICE ELSEWHERE)



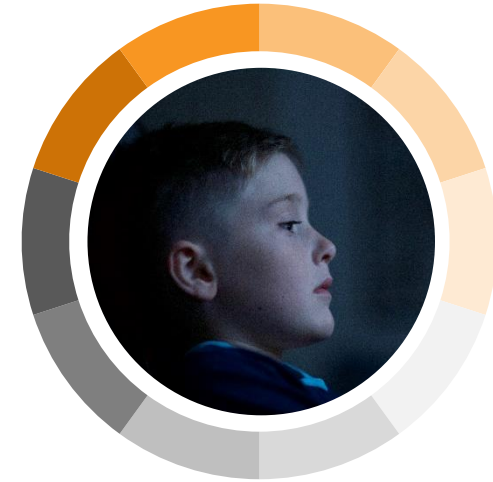
## TRUTH

Parents know that engagement in sports/physical activity is essential to the development of their children. It does more than help physical development... it boosts self-confidence and develops strong social skills (and more).



## NEED

Parents are working hard to enrol their children in extra-curricular sports and physical activities; supporting them in 2-3 different types of sports/physical activities on average.



## TENSION

But the costs involved (beyond session costs) are a significant pain-point for parents: forcing them to make sacrifices elsewhere in their budgets or forgo the activities completely.

And costs are only going up, across the board, from uniforms to travel.

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It's so difficult not being able to sign your kids up to what they want to do because it's too expensive. Not only registration, but specific uniforms or footwear they require... it makes them feel less than, and that other things are more important i.e. Petrol, Bills, food shopping, Mortgage which in the big scheme of things those things are more important... but when you're a kid you don't understand that.





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