

**BACKYARD SWIMMING POOLS IN AUSTRALIA:
AN ANALYSIS, 2005**

1. BACKGROUND

This is the inaugural edition of *Backyard Swimming pools in Australia: An Analysis, 2005*. It is envisaged that the study will be produced biennially, pending client demand.

BIS Shrapnel Pty Ltd has been analysing and monitoring household construction, renovations and additions and household appliance markets in Australia for over 20 years through private and multi-client studies. This new study builds on our experience and expertise in analysing these markets.

The primary objective of this study is to provide a comprehensive analysis of backyard swimming pools in Australia, based on pool owner feedback. In doing so, we aim to meet the information needs of an industry lacking quality market data.

2. METHODOLOGY

The pool owner data is the result of a targeted national telephone survey of 747 pool owners, undertaken in early December 2005. Fieldwork and data analysis was conducted by I-View Pty Ltd, on behalf of BIS Shrapnel. Experienced telephone interviewers used a CATI system to collect responses.

Pool owner's that had a separate outdoor spa (excluding spa baths), were also questioned on the spa.

To target pool owners, BIS Shrapnel purchased a pool owners list through a list broker. The survey covered all states, except Tasmania and the Northern Territory.

The 747 surveys largely reflected the distribution of backyard swimming pools, with New South Wales and Queensland having the largest sample, followed by Victoria, Western Australia and South Australia.

The sample size by state was as follows:

Location:

New South Wales	299
Queensland	257
Victoria	76
Western Australia	70
South Australia	45
Total	747

Sample sizes across other key demographics:

<i>Dwelling Type:</i>	
Detached house	691
Townhouse/villa/semi/duplex	13
Other	43
Total	747

<i>Respondent's Age:</i>	
18 – 24 years	61
25 – 34 years	31
35 – 44 years	175
45 – 54 years	244
55 – 64 years	138
65 years and over	88
Refused to answer	10
Total	747

<i>Gross Household Income:</i>	
Less than \$25k	49
\$25k – 34.9k	37
\$35k – 44.9k	47
\$45k – 54.9k	64
\$55k – 64.9k	52
\$65k – 74.9k	59
\$75k – 84.9k	36
\$85k – 99.9k	61
\$100k – 124.9k	81
\$125k – 149.9k	40
\$150k and over	57
Refused to answer	164
Total	747

<i>Household Structure:</i>		
Couple/de facto	No child	83
	Kid/s pre-school	42
	Kid/s aged 5-17	231
	Kid/s aged over 17	220
	Empty nesters	130
Shared		6
Single		35
Total		747

3. MARKET COVERAGE

The study is presented in one volume, which includes the following:

- Backyard swimming pools (above-ground and built-in).
- Outdoor spas (identified via swimming pool owners).

As mentioned above, the study is not limited to pools installed in a specific time period, hence recently installed pools and pools installed twenty or more years ago are included.

4. SCOPE OF THE REPORT

Key sections include:

Economic Overview and Forecast

- BIS Shrapnel is Australia's largest independent economic and forecasting consultancy. We have over 20 years experience in analysing housing markets and home renovations; we present a situational analysis of the domestic economy along with our thoughts on where the economy and building and renovations markets are headed.

Market overview

- Estimated penetration of swimming pools
- Estimate of annual installations
- Estimated cost of recently installed pools
- Pool age analysis

Profile of backyard swimming pools

- In-ground versus above-ground
- DIY construction versus pool builder
- In-ground pool material: concrete versus fibreglass
- Outdoor spa (stand-alone versus incorporated with pool)
- Size of swimming pools (volume)
- Length of swimming season (start/stop month)
- Method of pool sanitisation

Filter pump analysis

- Hours of use analysis:
 - One longer session per day or two shorter sessions
 - Usual length of sessions
 - Normal start and stop times
 - Does it differ in and out of season
 - Is filter connected to a timer
 - Filter location
 - If enclosed, main material of enclosure
 - Has a neighbour ever complained about filter noise
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Pool heater analysis

- Type of heating
- Does heater require a separate pump
- Connected to a timer (same or different timer to filter)
- Hours of use per day (in and out of season)

Pool blanket analysis

- Frequency of covering pool
- Coverage difference in and out of season

Pool cleaning system analysis

- Method of cleaning
- Does it require a separate pump

Spa analysis

- Separate spa or connected to pool
- For separate spa:
 - Location (outdoor; outdoor with overhead cover; indoors)
 - Frequency of use
 - Approximate volume
 - Usual state – empty or full
 - Frequency of empty and refill

Energy issues analysis

- Who is your electricity/gas supplier
 - Have you changed supplier since 2000 (if yes, previous supplier)
 - Discussion on 'Time-of-use' meters
 - Awareness
 - Interest in the concept
 - Discussion on discount tariffs (Queensland only)
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Miscellaneous

- Have you replaced any pumps (filter, heating or cleaning) since you've had the pool?
- Do you have any of the following appliances/facilities:
 - Electric storage hot water systems (is it off-peak)
 - Split system air conditioning system
 - Window/wall air conditioning system
 - Fully ducted air conditioning system
 - Fully ducted evaporative cooling system
 - Pool-side shower
 - Pool-side toilet
 - Sauna
 - Steam room

5. BIS SHRAPNEL

BIS Shrapnel Pty Limited is Australia's largest independent business research and forecasting company. We offer an unmatched combination of strengths: economic analysis and forecasting, coupled with marketing intelligence gathering and analysis. For further details visit the BIS Shrapnel website at: www.bis.com.au.
