

Centre for Sport and Social Impact



Building an evidence base to increase participation in Lawn Bowls

Final Report for Bowls Australia

Acknowledgements

We wish to thank the many bowls club members and staff for contributing their time and opinions to this research project and for encouraging members to respond to the survey.

The assistance of Tony Sherwill, General Manager Bowls Operations at Bowls Australia is also gratefully acknowledged.

Thank you also to our team of researchers within the Centre for Sport and Social Impact.

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June 2013

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Executive summary

The Centre for Sport and Social Impact (CSSI) at La Trobe University was commissioned by Bowls Australia to undertake research into the reasons people play bowls, the physical and mental health benefits they derive from participation, why people cease playing bowls, what constitutes the 'bowls experience' and what changes are required to make bowls more attractive?

The research method employed to investigate these questions consisted of two stages. Stage 1 consisted of 90 face to face semi-structured interviews conducted at 18 clubs across Australia with current club members bowling in pennant competitions, social bowlers, previous members, and club committee representatives and staff. Seven major themes emerged from the analysis of the transcripts of the interviews conducted for Stage 1:

- Reasons for playing
- Physical health, Mental health and wellbeing benefits
- The 'Bowls' Experience – areas for improvement
- Bowls formats – commentary
- Changes in the bowls experience
- Why people stop bowling
- Club survival challenges

Stage 2 consisted of a paper survey distributed to 4000 bowls club members from 100 clubs across Australia to collect data on individuals' involvement in bowls, their motives, satisfaction with their bowls experiences, their commitment to remain involved with bowls, their perceived physical and mental health status and selected demographic variables.

The following conclusions are made in relation to the six questions that formed the basis for this study.

WHY DO PEOPLE PLAY BOWLS?

1. Most interviewees came to bowls from other competitive sports, and thus bowls provides the opportunity to continue to enjoy competitive and team aspects of sport.
2. Bowls provided a viable opportunity for individuals of different skill levels to fully participate and enjoy the experience.
3. Many interviewees had held less than positive assumptions about bowls (that are also found in the wider community) that were only changed by a direct experience such as a social function or an introduction by a friend/neighbour to bowls.
4. Many interviewees spoke of themselves as a bowler in the sense of being in a space where they realised that 'outsiders' did not understand and held in low regard what they did and enjoyed.
5. As is the case with many other minority sports and pursuits, bowls members typically felt that non-bowlers did not understand or appreciate the advantages of bowls. To a certain extent this cemented their identity as 'bowlers' and provided a sense of solidarity with other members that can be a valuable resource for clubs when managed correctly.
6. Bowls is a sport that has some unique attributes; specifically being able to offer people of all ages and abilities a chance to play.
7. Bowls provides significant opportunities for social connections and friendships to develop that contribute to wellbeing.
8. The survey results confirmed the interview results in that the most important motives for participation in bowls are the sense of camaraderie and belonging from being part of a team sport and the social connections that participation in bowls provides, both of whom are higher for women than men.
9. As highlighted in the interview results, the survey found that only a small minority consider a place for social drinking within a club environment to be an important motive, and more so for men than women.

WHY DO PEOPLE CEASE PLAYING BOWLS?

10. The main reasons respondents believe people cease bowling are selection processes in clubs, the treatment of people by other club members and the quality of club administration.
11. The areas where clubs can improve their retention of members is in fostering an inclusive club culture, educating members in how to welcome and integrate new members and in improving their governance and management practices.

WHAT ARE THE PHYSICAL AND MENTAL HEALTH BENEFITS OF PLAYING BOWLS?

12. Bowls facilitates long lasting friendships that are often a central feature of the social support network for older people who may have lost their partner.
13. Bowls can offer a family friendly environment.
14. Bowls offers players of varying physical ability the chance to compete with each other in an integrated sport participation opportunity.
15. Participation in bowls assists in sustaining both physical and mental health.
16. Bowls clubs are safe social spaces for women.
17. Bowls participants can be grouped into 5 broad categories – consumers, bowlers, socialisers, clubbers and identifiers – each seeking something different from their bowls experience.
18. The survey results confirmed the views of interviewees in that respondents reported higher physical and mental health status compared to the general population.
19. Physical and mental health status does not vary based on the degree of involvement (aside from bowlers who attend more than 20 hours per week reporting higher physical health), suggesting that any form of involvement in bowls is beneficial for both physical and mental health.

HOW ARE CHANGES IN DEMOGRAPHICS OF COMMUNITIES AFFECTING BOWLS CLUBS?

20. Membership decline is a pervasive problem throughout bowls.
21. Clubs appear ill-equipped to deal with diverse population groups and need assistance in how to communicate with and market themselves to local communities.
22. Clubs are facing a number of key challenges, specifically in relation to the way in which they manage their business, the increasing financial pressures to run a club and their future leadership capacity.
23. The profile of survey respondents' broadly reflects that from the Bowls Australia Census data.
24. The majority of respondents are of retirement age, earn less than \$40,000 p.a., are born in Australia and if born overseas have been living in Australia for more than 10 years.
25. The pattern of club involvement does not vary significantly by State.
26. Most club members have been involved with their club for more than 6 years, visit the club more than 10 times per month, spend at least 10 hours per week.

WHAT FORMAT FOR PARTICIPATION/ COMPETITION BOWLS IS PREFERRED FOR DIFFERENT AGE GROUPS?

27. The majority of respondents are satisfied or very satisfied with the length of the season for and scheduling of competitions.
28. The provision of adequate levels of quality coaching and perhaps the timing of its provision seems to be an important driver of satisfaction among bowls participants.

WHAT ARE THE CHARACTERISTICS OF THE "BOWLS EXPERIENCE" THAT WILL ATTRACT NEW PARTICIPANTS?

29. The length of the Pennant season should be reviewed to maximise its appeal to a diverse market.
30. More flexible scheduling of competitions should be investigated as a way of maximising participation.
31. Selection processes are important drivers of club member satisfaction.
32. Clubs should consider how they can be more accommodating of a diverse set of potential users of their facilities and services.
33. Mixed competition structures should be encouraged.
34. Shortened game times seem to have been well accepted by the bowls community.
35. A key challenge for bowls is to offer a desirable bowls format that fits between casual bowling and Pennant competition that will attract a market that clearly does not want to play Pennant in its current form.

Introduction

The Centre for Sport and Social Impact (CSSI) at La Trobe University was commissioned by Bowls Australia to undertake research to address the following questions:

1. Why do people play bowls?
2. Why do people cease playing bowls?
3. What are the physical and mental health benefits of playing bowls?
4. How are changes in demographics of communities affecting bowls clubs?
5. What format for participation/competition bowls is preferred for different age groups?
6. What are the characteristics of the “bowls experience” that will attract new participants?

The research method employed to investigate these questions consisted of two stages.

First, 90 face to face semi-structured interviews were conducted at 18 clubs across Australia with current club members bowling in pennant competitions, social bowlers, previous members, and club committee representatives and staff.

Second, a paper survey distributed to 4000 bowls club members from 100 clubs across Australia to collect data on individuals' involvement in bowls, their motives, satisfaction with their bowls experiences, their commitment to remain involved with bowls, their perceived physical and mental health status and selected demographic variables.

Together, these two data sources have been used to provide a representative “picture” of the perceptions of bowlers across Australia of their bowls experience.

Method

Stage 1

The first stage of the project involved semi-structured face to face interviews with 90 interviewees from 18 bowls clubs across Australia. Clubs were selected by the research team in conjunction with Bowls Australia staff to ensure a representative selection of clubs were included in the sample based on geographic location, club size and gender mix of club members. The distribution of clubs across Australia is shown in Table 1.

Table 1 – Distribution of clubs for interviews in Stage 1

State	Capital city	Rural or Regional city	Total
New South Wales	2	3	5
Victoria	2	2	4
Queensland	1	2	3
South Australia	2		2
Western Australia	2		2
Tasmania	1		1
Australian Capital Territory	1		1

Interviewees were nominated by club contacts and included club or social members, previous club members, and club committee representatives and staff.

The interviews with club or social members focused on exploring:

- Individuals' bowls experience;
- Their perceptions of why other bowlers cease participating; and
- Their perceptions of the benefits they receive from participating in bowls.

The interviews with previous club members focused on exploring their:

- Reasons for leaving bowls,
- Bowls experience;
- Perceptions of why other bowlers cease participating; and
- Perceptions of the benefits they receive from participating in bowls.

The interviews with club representatives and staff focused on exploring:

- Observed changes in demographics and diversity of their local community;
- Changes in club practices to deal with changes in demographics;
- Case studies of different bowls formats currently offered across Australia; and
- What are the elements considered to comprise the "bowls experience".

Interviews were conducted on club premises and between 9am and 9pm to ensure people who were working had the opportunity to participate. Each interview was digitally recorded, transcribed and then analysed using NVIVO, a software package used to facilitate the analysis of qualitative data. The transcripts of each interview were coded separately by two members of the research team and cross-validated. Discrepancies were checked and agreement sought between the research team members based on standard qualitative data analysis protocol.

Stage 2

This second stage of the project involved the distribution of a paper survey to 4000 bowls club members from 100 clubs across Australia. The bowls clubs were identified by Bowls Australia staff with approximately 5 clubs being drawn from each of the 20 Bowls Census regions across Australia.

A pack of 40 surveys were mailed to each bowls club contact (President or Secretary) provided by Bowls Australia. This survey pack included a covering letter explaining the purpose of the survey and asking each club to distribute the survey to 40 members. To encourage a high return rate clubs were offered an incentive that if they returned at least 10 surveys from their club they would receive a Coles Myer Gift Card to the value of \$200.

The surveys provided to individuals included a covering letter explaining the purpose of the survey, the survey, and a reply paid envelope.

The survey included questions to collect data on individuals' involvement in bowls, their motives, their satisfaction with their bowls experiences, their commitment to remain involved with bowls, their perceived physical and mental health status and selected demographic variables.

A total of 1763 surveys were returned; a response rate of 44.1%, a very high result for surveys of this nature, particularly as no reminders were issued.

At least 72 clubs returned at least 10 surveys each, while a further 9 clubs returned between 1 and 9 surveys. 17 clubs failed to provide any responses.

Each returned survey was scanned and entered into an excel spreadsheet. Five surveys were omitted from the analysis due to missing or incomplete data, thus 1758 usable surveys were included in the analysis that was conducted using PASW Statistics v19.0.

Stage 1 – Interview results

Seven major themes emerged from the analysis of the transcripts of the interviews, excerpts of which are provided here anonymously to protect the identity of individuals and their respective clubs. The major themes from the interviews were:

1. Reasons for playing
2. Physical health, Mental health and wellbeing benefits
3. The 'Bowls' Experience – areas for improvement
4. Bowls formats – commentary
5. Changes in the bowls experience
6. Why people stop bowling
7. Club survival challenges

Theme 1: Reasons for playing

The most common and consistent reasons interviewees cited for playing bowls, in descending order of importance, were:

- seeking to play a competitive sport,
- a particular interest in the skill-based nature of bowls,
- the sense of camaraderie and sense of belonging from being part of a team sport,
- the social connections that participation in bowls provides,
- the perceptions that the specific activity of playing bowls offers mental health benefits, and
- the capacity to engage in social drinking within a club environment.

Each of these reasons is explained with one or more indicative quotes that capture the essence of what the majority of interviewees stated.

COMPETITION

More than half the interviewees played bowls for the opportunity to play a competitive sport, and for most bowlers, it was the second or third sport in their “sporting career”, in the sense they had progressed from playing more physically

demanding sports such as football codes or tennis and were still seeking to participate in a competitive sport.

Well I've always played competitive sport all my life starting with Australian Rules Football and athletics and then mixing it with yachting over many years. And the stage came where retirement and having to turn a yacht into Superannuation and age as well. We couldn't continue with our yachting and our next door neighbour whom I've known most of my life suggested I come and play bowls so that's how it all started. But really it's a continuation of competitive sport or yeah a challenge ... another challenge.

Yeah and the skill level is up to you on the day, it's incredible. And I think that's what actually gets people hooked .. you are really, absolutely playing against your own skill. It's totally up to you how you do out there.

It's a challenge personally to be your best and every game you go out (to) is different ... every end, everything is different so there's that challenge. And the other side of it is it's ... you can play individually but you can also play as a team and playing as a team is the camaraderie that competitiveness and as a group you're going out on challenge side. That for me is competition.

GETTING HOOKED

The majority of interviewees indicated that bowls is a sport that transforms people's opinions of the sport once they have actually bowled. Many interviewees became "hooked" on bowls only after they had attended a social or informal event; this seems to be one of the keys to overcoming what some interviewees identified as a somewhat derogatory perception by non-bowlers of bowls.

I think once a lot of people try it they like it. A lot of people say that they're not ... would never play lawn bowls, but if you get people down for social functions or work do's, the majority come off saying that they enjoyed it. Whether they choose to take it up is another thing, but I think people that try it enjoy it.

TEAM ENVIRONMENT / CAMARADERIE

The team and club atmosphere that bowls provides for its participants was cited consistently by interviewees as one of the reasons for playing bowls. The ability of bowls to accommodate players of varying ages in a team was considered one of the unique aspects of the sport that contributed to this strong sense of camaraderie.

I think they loved having a younger bloke and I loved being a part of it. It was fantastic and as you moved up to division four where you had blokes sort of between say 30 to maybe 60, but it is and as you get to the higher divisions, the age generally will drop. There are a few old timers that are still pretty handy but that's how it works but my most enjoyable times were with the old blokes.

I like the team atmosphere. I've played a lot of team sports as a kid. I've grown up playing T-ball, baseball, football. So I like team games. But it's still fairly social. And you play your two bowls each end but you're with six other blokes, and you have a chat and talk about your races or your sport. But, no, it's a good team orientated game.

It's a team sport which is a wonderful camaraderie and you get you know that pleasure of playing within a team.

I guess the (reason I like bowls is) camaraderie. I mean we were quite a good side and when you've got blokes that are in their 80s that you can have high fives with, and I know that sounds strange, but it's good fun. Like I've played state baseball, softball all that sort of stuff and I'm a social basketballer so I'm no athlete but when you go from that where you're playing very competitive, when you can play with an 80 year old bloke who's deaf and so on, you ... I don't know sign language but you can communicate with him enough to give him a high five and when he clenches his fist when he hits the jack ... like that's gold. That's what it's about I think and you know when your Skipper passes and never says a bad word and he's ... if you put two in the ditch and he'll still just pat you on the shoulder and say get them next time opposed to ... if in another division or something, he might say well you're killing us here, as opposed to this bloke who'd pat you on the shoulder and say get them next time. It doesn't matter and all that. That's the right environment.

SOCIAL CONNECTIONS

The social connections that individuals develop through bowls were cited by interviewees as another common reason why they chose to participate in bowls. This was a particularly consistent theme amongst female interviewees.

Incredibly strong friendships. Incredibly strong friendships. You find ... I've always been a sports orientated person and team sports, rather than individual sports ... I like my golf but mainly team sports and it does foster a very good team attitude and that being said you do get to meet and become friends with a lot of diverse people.

And if you don't want to play pennants, it's a great social life, just playing, you know, social bowls. We've got quite a few ladies here that just play social bowls. Yeah. They don't want to go higher.

MAINTAINING MENTAL HEALTH

Interviewees also cited the unique format of bowls competition as being particularly helpful in offering mental health benefits; this was usually articulated as providing an opportunity

to concentrate for extended periods of time as well as offering the opportunity, particularly for older participants, to engage in a significant and regular social activity.

I think it's ... for me it's something to look forward to during the week. I mean I play a few other sports but I would say I look forward to my bowls more than anything else in regards to sport. I think it's ... mentally it's quite challenging, more so than physically. But by the same token you're on your feet for three or three and a half hours and you're walking up and down the green 20 or 25 times, so you are getting some physical benefit, but I think it's just more about the participation and enjoyment. That's what I get out of it.

SOCIAL DRINKING

The final reason a small number of interviewees (all male) cited for participating in bowls was the opportunity their bowls club offered them to participate in a social drinking environment.

I think it's probably a big attraction sadly to say. I think it's an avenue where a lot of blokes will come down to the club and have a roll and then have a game and have a few beers and their wives don't come ... the men enjoy the social side of it so certainly I think that ability to come in and play a game and have a drink is an attraction for people.

It's probably the world's worst sport (chuckling) for your health from the fact that people go and drink beer and other things in the middle of the day in the steaming hot sun and dehydrate themselves and all the rest of it, but some do that. But on the other hand, yes I think it is.

Key points on Theme 1: Reasons for playing

- Most interviewees came to bowls from other competitive sports, and thus bowls provides the opportunity to continue to enjoy competitive and team aspects of sport.
- Bowls provided a viable opportunity for individuals of different skill levels to fully participate and enjoy the experience.
- Many interviewees had held less than positive assumptions about bowls (that are also found in the wider community) that were only changed by a direct experience such as a social function or an introduction by a friend/neighbour to bowls.
- Many interviewees spoke of themselves as a bowler in the sense of being in a space where they realised that 'outsiders' did not understand and held in low regard what they did and enjoyed.
- As is the case with many other minority sports and pursuits, bowls members typically felt that non-bowlers did not understand or appreciate the advantages of bowls. To a certain extent this cemented their identity as 'bowlers' and provided a sense of solidarity with other members that can be a valuable resource for clubs when managed correctly.
- Bowls is a sport that has some unique attributes; specifically being able to offer people of all ages and abilities a chance to play.
- Bowls provides significant opportunities for social connections and friendships to develop that contribute to wellbeing.

Theme 2: Physical health, Mental health and wellbeing benefits

The most common physical health, mental health and wellbeing benefits participants can derive from bowls that were cited by interviewees, in descending order of importance, were:

- the development of social connections and friendships,
- general mental health,
- general physical health, and
- the provision of a safe social space for women.

Each of these benefits is explained with one or more indicative quotes that capture the essence of what the majority of interviewees stated.

SOCIAL CONNECTIONS AND FRIENDSHIPS

Bowls was considered to be particularly good at fostering connections amongst team and club members. These connections clearly extended beyond the green. Many long term bowlers noted the several significant and long lasting friendships they had developed through their involvement in bowls, and that these friendships were often a central feature of their social support network, especially for older people who may have lost their partner.

Oh, look, for a lot of people ... (this area) being what it is you get a lot of people that have been here for a while and this is the place to come and so I think for the bowlers, and for a lot of members too, being able to come to the bar, come to a place where you know 99% of the people at the venue is comforting. You know people that are now members of this club and bowlers that have come from everywhere right and to have that, which doesn't really exist anymore, and I don't know if people want it to exist, the fact that the bartender knows your name, and knows what drink you are and if you screw up you're out, so I think the social aspects of them being able to come here and ... these

guys all know each other and they've known each other for years and years and part of the reason for them coming down is just to catch up and be social.

Well, I think I've made a lot of friends through bowls. I mean I started bowls with a couple of mates in the corporate competitions, but I would say that I've got a much bigger network of friends through bowls than I had beforehand. And I would choose to come here, watch the footy or for grand final day, come here and watch footy for a function. We have functions here, for my brother's 30th we had the party here, so this is a place where I've made a lot of friends and choose to spend time here.

Bowls was also considered to foster a safe family environment, although this varied between clubs, with the more commercial multi-sport clubs not having this as a focus in comparison to rural based or smaller bowls clubs.

The social side is fantastic when you see the community. We have a lot of young children around here and a lot of families coming in and it's a good chance for, you know, a young family, people with young kiddies to come down and to be able to ... in a protected, well looked after, policed area, for them to come down and to be able to have a quiet beer on a Sunday afternoon or a Saturday afternoon or whatever it be.

Bowls also offers one of the few sport environments where players of varying physical ability can compete with each other in an integrated sport participation opportunity.

Totally, totally. And we play against ... in our sections that I've played we've played against mentally handicapped people as well, we've played ... I've played against plenty of people in wheelchairs, physically and mentally handicapped and it's an amazing leveller. It's a gentleman's sport.

The interviews also revealed that bowlers can be categorised according to their desire to invest in the development of social connections and friendships. These five categories include:

The Consumer: This person uses the bowls club to play casual bowls and is most interested in what the club offers them in terms of a social or entertainment experience with their existing friendship groups or workmates. 'The Consumer' will be willing to pay for a good meal, and will buy a few drinks, wants some basic instruction in bowls, and thinks of the bowls club as a service provider. 'The Consumer' is generally not interested in the social networks and connections that membership might offer them as they have well established networks with workmates and other friendship groups.

The Bowler: This person joins the bowls club to play bowls and is most interested in what they can get out of the club in terms of a sporting experience. 'The Bowler' could be focussed on the competitive element of the sport and is prepared to move clubs on the basis of better opportunities, better chance of success or in some cases, better financial remuneration. 'The Bowler' is not interested in the social networks and connections that membership gives them access to, beyond a brief acquaintance with their team-mates.

The Socialiser: This person joins the club for the purpose of socialising with others and making friends. The bowls experience is important, but only in so far as bowls appeals to them as one of a range of possible activities that they might have chosen. The physical activity that bowls provides is a bonus, but their primary goal in joining the club is to meet people. 'The Socialiser' might have a small friendship group, have recently retired, or recently been divorced or bereaved and is looking to expand their social network.

The Clubber: This person has been with the bowls club an extended period of time, perhaps five to ten years. The person has a love of bowls, but over time their friendship group has developed around the bowls club and their stronger friendships are with fellow members. 'The Clubber' continues to be a member of the

bowls club because the club largely represents their social network outside of family and their work-mates. Bowls itself is still important as a shared interest with other members, but the social aspect of the club is now the most important driver of their continuing membership.

The Identifier: This person is a long-term member of the bowls club, usually for twenty years or more. This person identifies themselves as a member of the club almost above all else (they are still a spouse, parent or worker, for example, but being a member of the club is an essential part of their identity). 'The Identifier' is invariably a member of the committee of management and has a vested interest in seeing the club succeed. This person has a very strong social network within the club and takes joy or satisfaction from being known around the club. Over time the social network of this person may have moved from the bowlers to fellow committee members and administrators.

MENTAL HEALTH

The mental health benefits were considered to be derived from the thinking required to participate in a game of bowls; the consideration of strategy, communication between players, remembering the order of bowling in your team, scoring, etc. were all considered important for maintaining cognitive ability.

Mentally I think there are lots of pluses. I think one from a social aspect, just that interaction is good for people. Two, competition is something which will make you think about what you're doing. I think the planning and tactics of a game is quite considerable so I think that that is good. 'Cause as people do get older they probably play in the low but they've still got to think about their game and that so I think mentally I think there's enough challenges there to keep you mentally active and that there.

PHYSICAL HEALTH

Interviewees considered the physical benefits of playing bowls to be limited in relation to the mental health and wellbeing benefits that individuals can derive from playing bowls and being a member of a bowls club. The physical

benefits were expressed in terms of bowls offering an opportunity to participate in gentle exercise, to assist in maintaining major joint movement (knees and hips) and offering a low impact form of competitive sport that people can play into older age.

Physically it's good gentle exercise, a lot of walking and bending and it's good gentle exercise and you're out in the fresh air.

SAFE SOCIAL SPACE FOR WOMEN

Many of the female interviewees stressed the importance of the bowls club in providing a safe social space for them to participate in bowls and other activities, especially if they were no longer with a partner.

Yes, yes. See, when ... it's different for men, when a woman loses her husband to go out socially where there's men and women, husband and wife, it's a bit hard now, anyone can come up to the club here, bring a lady friend, go to the bar, get a drink and sit down and be as happy as Larry, but they wouldn't go to a hotel.

A lot but there's a lot of ... there are a lot of single people, when I say widows or widowers and the bowling club is a fantastic social outlet for them 'cause there's not many places if you're a widow that you can come in to a social event and not feel that you're the only one that hasn't got someone because there's a lot of people in the club so they don't feel different.

Key points on Theme 2: Physical health, Mental health and wellbeing benefits

- Bowls facilitates long lasting friendships that are often a central feature of the social support network for older people who may have lost their partner.
- Bowls can offer a family friendly environment.
- Bowls offers players of varying physical ability the chance to compete with each other in an integrated sport participation opportunity.
- Participation in bowls assists in sustaining both physical and mental health.
- Bowls clubs are safe social spaces for women.
- Bowls participants can be grouped into 5 broad categories – consumers, bowlers, socialisers, clubbers and identifiers – each seeking something different from their bowls experience.

Theme 3: The 'Bowls' Experience – areas for improvement

The most common elements of the “bowls experience” that interviewees considered could be improved were:

- the length of the Pennant season,
- inflexible scheduling of competitions,
- selection processes, and
- limited flexibility in club access.

Each of these elements is explained with one or more indicative quotes that capture the essence of what the majority of interviewees stated.

LENGTH OF SEASON

The element of the bowls experience that most interviewees thought could be improved was the length of the Pennant season, which in most states extended over the Christmas holiday period and was 16 to 20 weeks duration. Of those interviewees who wanted a change, it was to reduce the total number of weeks, to extend the break over the Christmas holiday period, or to split the season into two halves (divided by the Christmas holiday period) with no requirement to compete in both.

People are away, and part of the problem with that is one of my pet problems with bowls, particularly in (this State) ... we play far too many games in a pennant season. We play 18 Saturdays which means the whole of your summer's just about taken up with bowls, which creates family problems and that's when guys start ... if you own a cottage, seaside cottage and over the Christmas period, January, February, the best months of the year, your wife says oh yeah, we're going to the cottage this weekend, oh I'm sorry I've got to play bowls. No. So then they start putting their name up as unavailable. And that's when you have to start filling in. So, and then of course in a club like this, our age group is such where we've got so many guys just in failing health that you never know from one week to the next. In fact every week it's a struggle to fill our four teams. So you really

don't know and you've just got to juggle things around.

It is a big ask, it's every weekend and we try to ... you know with obviously being younger players we try to have a series of what we call bankers. So there is ... there's our ... us mad people who will bowl every weekend you know and every club's got that but we have a section of members who are not available every weekend. We put it out to them that that's absolutely fine, there's no pressure and that makes people more conducive to bowling when they can bowl. So if you ... we've got people with commitments with children you know split families things like that. So fathers who have the kids every second weekend so every other weekend they're free. And there's just you know life's complicated with 30, 40 year old ... 20 to 40 years olds.

Yeah it is and it's you know an every week commitment, so I think that length of commitment ... 'cause when we say to our new ladies oh would you like to play pennants, you trying to hook them up to five months instead of trying to hook someone in for six weeks whereas people might go oh yeah I can manage that. When my friends go well how do I get a Saturday afternoon away from the kids, every week for 16 weeks, how do you do that?

SCHEDULING

The decision making over scheduling is controlled by club delegates with an inherent interest in maintain the status quo and not changing competition schedules to suit a new cohort of members as this interviewee explains.

Well the group of ladies ... small group of those ladies wanted to play and my wife wanted to play at the same club where I was a member because I shifted here before she did and then the club had a very active scroungers' competition of a Tuesday night and that competition was for people who wanted to start playing bowls from people from around the place would come down and they'd have a social game. And some of the ladies there were enlisted to come and start playing bowls so there is a group now of about eight ... 15, 18, 20 ladies of whom more than half work, they don't have an interest in playing the

main competition but they do enjoy playing their competitions of an evening so the ladies have all of their championship events of a night-time ... and that's a problem at the state level because almost all of the state level ladies' championships are during the week. So the ladies who are good who want to play in them have to take more time off than just the Tuesday to play pennants then they have to take other days off to play in state championship events. And I believe it's the majority of ladies that want it that as well. There's a lot of older ladies that play and traditionally they've played on the Tuesday and they play during the week and that's where it's going to stay.

sort of associations and so we've got a lady here ... we've got a few babies in the club at the minute and people, but she had brought her two kids and she's here from South Africa. She doesn't have anyone to look after them. She wants to play bowls. They're six and eight, they're alright, they don't do anything but I can imagine at other clubs people would be looking, ladies would be looking and thinking well it's not a place for children, they shouldn't talk to you on the green. Yeah I remember at the tennis club when I played tennis, my girls were little, the kids used to come out on the courts and say mum. You'd go, hold on a second ladies, go sort the kid out. So I think that's a bit of a barrier as well for people.

SELECTION POLICY AND EFFECTS

Issues of selection processes and decisions were raised as one area in which interviewees thought bowls clubs could be more transparent about criteria, processes and conveying decisions about selection to members.

The conflicts? With bowlers most of it is around selection. People think they're better than what they are. I mean it's as simple as that. I mean that's where you'll probably get 85 to 90% of the issues in most clubs is that blokes get selected somewhere and they think they should be higher and that's a constant. Occasionally you get ... and probably your 2 to 3% maybe less than that is individual conflict, but in general it's usually about that.

LIMITED FLEXIBILITY IN CLUB ACCESS

In some cases, interviewees noted that their own club, or one they had previously been involved with, was inflexible in catering for the needs of potential members. This was specifically in relation to the provision of services or spaces by the club to cater for mothers with young children and, in some instances, a culture that was not welcoming of young children in the bowls club environment.

There's quite a few families around but I think some bowls clubs make it more difficult for you to have your kids there. They're not geared up to kids 'cause they've been ... you know those older

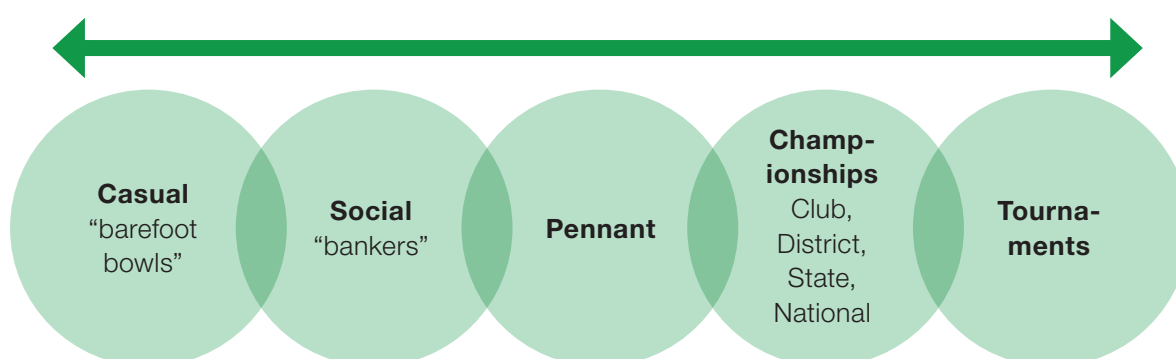
Key points on Theme 3: The 'Bowls Experience' – areas for improvement

- The length of the Pennant season should be reviewed to maximise its appeal to a diverse market.
- More flexible scheduling of competitions should be investigated as a way of maximising participation.
- Selection processes are important drivers of club member satisfaction.
- Clubs should consider how they can be more accommodating of a diverse set of potential users of their facilities and services.

Theme 4: Bowls formats – commentary

Bowls is considered a sport with a rich history of formal competitions built on the traditional format of Pennant Bowls – the weekly club vs. club competition. Bowlers can participate in a myriad of other championship and tournament events, and a range of other causal or social formats as depicted in this continuum.

Figure 1 – Continuum of bowls formats



The Pennant, Championship and Tournament structure was considered integral to the sport by the majority of interviewees. The most disparate responses to questions about the format of bowls participation and competition opportunities from interviewees were in relation to two key issues. Firstly, almost all interviewees lamented the limited number of participants in Casual formats of bowls that transition to becoming Social or Full Members, with varying explanations offered – the gap in skill between casual participation and regular competition is too great, the commitment to play a season of Pennants is too onerous, there is no coaching provided for new players, older established members don't make younger members welcome, the game is too long, there is no system or structure provided to facilitate membership growth.

Second, whether the existing format of Pennant bowls is attractive for potential club members with various opinions provided – we have always had Pennants on a weekday so newcomers just have to fit in, it is the backbone of the sport, playing fours is a good way to learn the game, playing Pennants is too slow and long for the youngsters, there are too many rules.

An example of the cultural issues embedded within some bowls clubs in how they are

engaging in new member recruitment is illustrated by this interviewee.

We're not encouraging anything like barefoot bowls with screaming young fellows running around with a stubby in their mouth and running around bowling up and down and eating a sausage. What we are trying to do is we've introduced what we call twilight bowls for business houses. So we've got three or four insurance teams, it starts tomorrow night, we've got eight teams and that will certainly assist the bar trade and will certainly ... don't think we'll make a lot of money because we're only charging \$5 or something like that and they will be given a sausage in a hamburger as a bit of a blotting paper. But it'll make some money and but the whole basis of it is to maybe sell (the Club), even if they're not ready to play permanently now, in the future when they think oh, I wouldn't mind taking up bowls, we'll join (the Club).

This is in contrast with the flexibility of bowls play that some participants are seeking or suggesting should occur in bowls to make it more appealing.

Well, we ... I mean the idea is you're trying to get the ball as close as you can to the jack and you don't necessarily need to use something like a jack as your target. We had a game two years ago where we put money on the green and

weighed it down and whoever landed on the money won the pot, so incorporated something like that and then a lot of players that come out here, a lot of social bowlers that come out here, they develop their own style of game, which might just be a round robin, closest to the jack, or trying to lay the balls in a certain pattern or something like that, still requiring the same amount of skill but the format of the game has totally been thrown out, they're not playing 21 ends, they just simply play one end, roll back and the winner wins, right, wins that game and then they play another game and so the game consists simply of rolling and rolling back. There's a lot you could do but I guess steeped in tradition as it is ... I mean you could develop ... like with the kids we'd need to put together something that would make it interesting for them because I know that they would just simply tune out after five minutes of having to wait on the bank for 15 minutes for their mates to roll.

Pennant's too stuffy as well, it's ... you can't ... it's all very official and whatever whereas our Thursday two by twos that we play is sensational because it's a much friendlier game and you can talk to somebody two rinks over and you're quite happy to pick up the other bloke's bowl and have a chat about whatever, it's very relaxed and good fun.

The lack of appeal of the current format of Pennant bowls for many newer members of bowls clubs, specifically the speed of play, the number of times bowlers get to bowl, and the lack of structured coaching is illustrated by these interviewee responses.

I play in fours, I'm playing at skips, so I'm waiting to the very end to play and then two bowls and I'm done, it's like, oh, now you wait another 15 minutes for it all to happen again. And I can see how some young kids would find that frustrating because you're not doing anything active in between the time that you're waiting to bowl, you're sort of just watching the other person's bowls and you sort of ... you play the mind game but in terms of developing your bowling skill nothing's happening until you actually roll

I found the hardest, the mentally straining games were the singles games so the inter, sorry intro

club, so that they were quite ... I find the singles game is quite demanding on the brain. It's a lot of strategy whereas the pennants games, the sixes, fours, you bowl 42 bowls in three and a half hours. I mean you can't wear yourself out and if you bowl in leading or second or anything, your bowls never finish where you left them anyway so you feel obsolete. You put down two of the best bowls in your career and by the time you get to the other end they're in the ditch anyway so it doesn't matter.

There's no coaching as you moved up like they would push you up to ... you know they want the younger bowlers in the higher divisions, but there was never any coaching. I think there is a club coach who's a great bloke but on field or on the rink there was never any coaching work, it was ... that was ... you'd pass and you know come on lift your game guys or good bowls and that sort of thing which is fine but just different to sort of other sports I guess.

Key points on Theme 4: Bowls formats – commentary

- A key challenge for bowls is to offer a desirable bowls format that fits between casual bowling and Pennant competition that will attract a market that clearly does not want to play Pennant in its current form.

Theme 5: Changes in the bowls experience

The most common elements of the “bowls experience” that interviewees noted had changed over recent years were:

- Membership decline,
- Increased diversity amongst local communities,
- Mixed competition, and
- Shortened game times.

Each of these elements is explained with one or more indicative quotes that capture the essence of what the majority of interviewees stated.

MEMBERSHIP DECLINE

While some larger clubs indicated they had maintained or even increased regular club membership numbers in recent years, the overwhelming story at the majority of clubs we visited was that membership numbers were declining and with that a change in how the club provided services to its members. This often translated into a shift from volunteer labour in running the club to outsourcing or sharing resources with other clubs as less members were able or willing to volunteer their time, a reduction in the number and range of social events provided to members outside of weekend or regular competition days, and a reduction in the grading of club teams as their playing stocks dwindled. The following interviewee highlighted the detrimental effect dwindling membership has on the social aspects of bowls clubs.

We run a Friday night bowl ... they're trying here, they're trying ... they've tried a Thursday night bowl, they've tried a Wednesday night bowl, they've tried a sausage sizzle, you come along and have a sausage sizzle and then bowl, just hasn't got the get up and go that we'd like to see them do. I remember we used to have a meal here on Friday nights, we don't have meals every night of the week because we don't have a permanent cook, but we used to have Friday night meals and you'd go in there and there'd be

50, 60 people sitting down having a meal. I come along on Friday night now and we got an old fellow here that's been coming here religiously for years, every Friday night he sits at that table on his own and there might only be two or three people having a meal. Years ago, not even that ... about four years ago that place would be crowded. It only seems to be in the last five years it's deteriorated down to the situation it is today.

DEALING WITH DIVERSITY

Many interviewees from clubs in inner metropolitan areas noted the changes in the composition of their immediate local communities. These changes ranged from suburbs becoming populated with younger families or professionals who did not seek to engage with the bowls club to areas with significant increases in people from non English speaking backgrounds with little knowledge, affinity or interest in the sport of lawn bowls. This presented some challenges for clubs in understanding how to communicate with their local community and effectively market their club

Well, it's not being racist at all here but around (our Club) the Asian population is just sort of come in in one big bang and the people that used to play bowls as they gradually got older they sold their houses, maybe wanted to move to the coast, and the people who bought the houses were the Asians so ... and the Asians aren't very much interested in lawn bowls so whereas we had plenty of people round the area at the right age bracket to play bowls those people, as they retired, they moved out, the Asians moved in. We might have say six Asians out of the whole team here ... out of the whole lot... that play bowls and the rest, they're just getting too old and they're dying off.

MIXED COMPETITION

The relaxation of the rules allowing men and women to participate in one another's Pennant competitions has been welcomed by the majority of interviewees. While there are still some bowlers (mainly males) that resent playing against players of a different gender, the benefits this flexibility brings, especially for small clubs

that struggle to fill their team rosters, is generally well understood and accepted among bowlers.

Allowing men and women to play together and I think that's been nothing but positive for bowls in general, specifically on two points. You can bowl with your partner and enjoy having a day or just experience that team sport situation but also from ... the biggest point from that has been that we ... clubs like ourselves and especially a lot of the older clubs or older demographic clubs have been able to survive. They would never have survived if they had stuck to only men and only women, separate, segregated competitions.

That's what should happen, they should have a ladies pennant, a men's pennant and a mixed pennant.

SHORTER GAMES

The recent move to reduce the number of ends in some Pennant competitions has generally been welcomed and seen as a necessary step to reduce the burden for older players and also make it slightly more palatable for newer members committing to play regularly.

I think that would be probably up to the individual, if they thought 21 ends was too long, maybe for the older you might look at having a shorter game. Again the heat might be a factor. For me I hadn't really contemplated it, but I'm happy enough playing 21 ends. I think they used to play 25 ends, so I don't know. I guess ... we've got for new bowlers, not pennant competition, we've got scroungers, so if you're still developing your skill at the game you come down here on a Tuesday night and play scroungers and you just have a social game.

Key points on Theme 5: Changes in the bowls experience

- Membership decline is a pervasive problem throughout bowls.
- Clubs appear ill-equipped to deal with diverse population groups and need assistance in how to communicate with and market themselves to local communities.
- Mixed competition structures should be encouraged.
- Shortened game times seem to have been well accepted by the bowls community.

Theme 6: Why people stop bowling

There are a number of reasons people stop bowling, most of which are not within a bowls club's control, including members passing away, members being unable to bowl due to illness or ill-health, members moving away from a local area for work or family reasons, or the impact of work on people's availability to regularly compete. One interviewee provided a good summary of these reasons.

I suppose most of the older people is health issues. Some of the young ones it's ... I think it's just ... it's a bit that selection process that falling out. I suppose it's the falling out with the club and the fact is the way they think ... and a lot of them think they're better than what they are. They then say I'm not going to play anymore. A lot of them change clubs initially and then after a while they get the same sort of message and then they say stuff it and finish.... quite a few people this year that have left and it happens every year so my work commitments I think that's ... work commitments is probably one of the larger things these days because of all the shift work, all the ... I mean particularly in WA there's a lot of fly ins, fly outs, there's a lot of guys. And I would say we've probably lost three young ones in the last year, year and a half because of work, fly in fly out. They're just two weeks away, one week home and it just doesn't work so that's certainly having an impact on us and the regular shift. I mean I know a lot of guys that play Saturdays, they just can't commit to every Saturday because they do shiftwork and every second weekend you work.

Three further reasons were provided by interviewees that suggested that at least some of the reasons why people stop bowling were due to the actions of other club members or the culture of a club, including a dislike of the way clubs were managed, poor integration of players of different ages and the treatment of bowlers by either club members or opponents.

POOR CLUB MANAGEMENT

One of the common sources of frustration identified by some interviewees as the reason

why they themselves had stopped bowling or they had seen others stop, was a perception that a club is poorly managed and diminished the element of fun associated with bowls.

It's probably sour grapes but I thought the management and I thought some of the people at the club were just idiots. I think some aspects of it's poorly run and I think that ... well bowling stopped being fun. It got ... people they pushed me up divisions, got too competitive and bowling with people that were not that able, who were just too competitive and took the fun out of bowls. Having said that I am competitive and play other competitive sports, but like anything when it's not fun, you don't want to do it. You don't want to be involved anymore.

POOR INTER-GENERATIONAL INTEGRATION

Another common reason interviewees noted others stopping their involvement in bowls was the reluctance of older bowlers to make way for younger members which manifest in older bowlers refusing to play in lower grades or discouraging the involvement of younger bowlers.

Yes, the selection committees and selection cause more problems than anything else, and I think the main reason for that is as people get older they don't mind going up but they don't like coming down and they ... some don't have any problem but most don't realise that they're not quite as good as they used to be and they ... and a lot of them have a lot of trouble of making way ... making room for the younger members.

TREATMENT BY OTHER CLUB MEMBERS

The other common reason interviewees cited for people stopping bowls was the interpersonal relationships between club members and the treatment some bowlers received, especially from more accomplished bowlers toward less accomplished bowlers.

Well you give up at least four hours on a Saturday and I think it is too long when you bowl first or second because you not part of it, or you part

of the game but you are irrelevant to the ... each end in effect at the end. Like unless you're lucky you very rarely do your two balls stay in the same place so one thing that was a big notice was in division four we ... things like high fives and pat on the backs and things like that were just nowhere. No ... very rarely was there ... I mean people would say good bowl but in division six you put one down that hit the kitty the old blokes love it you know. You get a high five on the way back and things like that. In division four if you put one right on it they good bowl as you make your way back to your chair and little things like in division six you'd pass someone their bowl. Like the old people who ... their backs aren't great and you'd pick up the bowl for them, you give them their bowl and they love it. And you do that in division four and I had it with every bloke in my side and they said no, no I'm superstitious you don't touch my bowl and I just thought wow, I'm just trying to pass your bloody bowl. It's ... you know what I mean you ... not polishing your bowl I'm just picking it up and giving it to you because that's just a way to get each other involved in the game, but yeah that was too much for us. And some people ... and some opposition will be like that because you try and do it for everyone so yeah that's amazing that you can't do things like that and high fives you just look like an idiot when you put your hand up so. I'm sure I'm an unusual breed with enjoying things like that but that's why I was down here originally 'cause that's why it was fun, so.

These were people that were just spoken ... they would speak down to you, just fellow players. We had one day in a game last year where the skipper mouthed off to our team mates about the three of us. You know the skipper stays at the other end and he said those three blokes are effing hopeless, they've done nothing. I've been carrying them all day and when that comes back to you via the other blokes half way through a game, I mean as I said lawn bowls is enjoyable, it's got to be enjoyable so when you hear that, you ... like any sport it's motivation as well. Like you perform better when you're motivated and when your skipper tells you that well why do you want to perform for him? So everyone tries. You go out in every game to try to win, to be the best but when you hear that you'd rather go up and

have another beer and just mouth off at your skipper when he walks past you, which is the wrong attitude, but that's what was brought into it.

Key points on Theme 6: Why people stop bowling

- The areas where clubs can improve their retention of members is in fostering an inclusive club culture, educating members in how to welcome and integrate new members and in improving their governance and management practices.

Theme 7: Club survival challenges

The final major theme that emerged from the interviews was a series of challenges interviewees identified that all bowls clubs needed to address to ensure their survival. It should be noted that these challenges are perhaps more relevant to clubs that are generally smaller, in a rural location, or had limited additional revenue streams beyond membership dues and green fees and that this is not a complete list of the challenges. We have designated these as club survival challenges and they include:

- Subsidising the costs of bowls,
- Diversifying membership through multi-sport club structures, and
- Club governance.

SUBSIDISING MEMBERS

All interviewees from clubs with grass greens highlighted the significant financial burden maintaining a grass green imposes on a club and its members. Many clubs rely on significant amounts of volunteer labour or commercially derived green fees (i.e. corporate events or casual participants) to subsidise the membership fees.

Bowling clubs are about bowling supposedly. Most of them have found that all the bowlers are pensioners and fixed income and they don't spend much. The fees are relatively cheap. Membership fees are probably a quarter of bowling clubs and golf clubs and all that. Relatively cheap and people ... you don't get a lot of money out of your bowlers, so you've got to raise money. You've got ... we've got three grass greens. We've got a greenkeeper, an assistant and they're on \$60,000/\$70,000 a year for a greenkeeper, then his apprentice is on whatever. You make a bit of money out of the pub but we mainly run functions for corporate you know like we've had the rugby club here with two or three hundred people. They come and have a day and they bowl. We get insurance companies have their break-ups. They come here they use

the barbeque and it actually it's a good way of getting people involved in bowling.

Biggest challenges are working with membership. Keeping your membership up. For us we're very lucky we have a thing that we started years ago called Barefoot Bowls and it's become the norm around bowling clubs all around Australia. That is a corporate situation, where you didn't need ... anyone whose never bowled before can just pop into the club, as long as they're not wearing shoes, which means they can just take their shoes off on a nice hot Summer's day and walk out on the grass ... all bowling clubs have old bowls and they can get them out there and have a bit of a crack and so we're able to glean quite significant revenue

It's the cost of the club itself, running the club, is only being able to happen because of social bowls. The club actually runs at a loss if it's not for the social bowlers getting on.

MULTI SPORT CLUB OPPORTUNITY

In some cases, clubs have sought to partner with other sport clubs to share facilities and resources, and while the quote from the interviewee below highlights the benefits such moves can have, there remain significant cultural barriers amongst bowls clubs to consider such a move.

In past years there has been, I'll be brutally honest. This club was foundering ... or floundering sorry I should say, with our diminishing bowls membership and that's why we became a sports club we amalgamated with the (Club name 1) ... (Club name 2) and the (Club name 3) up there and there was always ... or not always, there was for a while a kind of, well we came and helped you out, now you've got more members you don't need our help you're trying to get rid of us sort of attitude that was fostered by a couple of people in the background and they were only serving their own purpose and we've turned ... we've managed to turn that attitude around in the last five years. There's three sports sections and we now have a darts section and that's got an equal representation and an equal billing in the club. That's ... we've been able to turn around that sort of connection and everyone

is 100% united and it's an amazing feeling when the cricketers come in after a day and they're all cheering and all the bowlers are asking them how they went and, you know, cheers and they're all ... everyone's into that. It's gone a long way but it's the attitude of people that have changed and the good attitude that has brought that together.

SKILLS AND CAPACITY OF CLUB LEADERS

A common theme among interviewees was also the recognition that bowls clubs need to get better at governance and running a bowls club in a business-like manner. The key areas where interviewees thought bowls clubs and their committees or boards could do better included:

- Financial management
- Event management
- Facility maintenance and development
- Hospitality management
- Volunteer management
- Club governance
- Grant applications
- Lease arrangements
- Contract negotiations

The culture of bowls clubs was also noted as both a strength and a weakness for their survival. This quote from one interviewee highlights the need for bowls to improve its club governance and management practices if it is to survive as a major participation sport.

And I saw that as a really big health issue because especially on Saturday pennants you have 78 year old men, some of them pretty dodderly and they're coming up and they're walking around back with a pot of boiling water and so I ... the ladies have had to put that on the table before any of the club players come in, and then they're not walking around with it.

But for ladies pennant one of our rinks one day decided oh we won't have teapots, we'll just have a tea station, where you come up and you help yourself. Well, World War Three (broke out). And anyway, there was a bit of a upheaval as soon as it happened, Well a couple of the old ladies, they just refused, just simply refused. I don't agree with it so I'm not having it, that's the answer. So I brought that up at the annual meeting and it did go through, that we stay with the teapots so I still think it's a very big health and safety issue, but I can't do anything about it.

Key points on Theme 7: Club survival challenges

- Clubs are facing a number of key challenges, specifically in relation to the way in which they manage their business, the increasing financial pressures to run a club and their future leadership capacity.

Stage 2 – Survey results

The survey results are presented in six sections:

- 1. Demographic profile of survey respondents,
- 2. Individuals' involvement in bowls,
- 3. Motives for involvement with bowls,
- 4. Satisfaction with their bowls experiences,
- 5. Commitment to remain involved with bowls, and
- 6. Perceived physical and mental health status.

Demographic profile of survey respondents

The demographic data from survey respondents indicated that:

- 73% of respondents were male; the remaining 27% were female.
- 81% of respondents were born in Australia; the remaining 19% were born overseas.
- 81% of respondents are married or in a defacto relationship; 16% are widowed, separated or divorced; the remaining 3% have never married.

Chart 1 shows the majority of respondents were from the eastern seaboard states that have the largest membership numbers. Thus the results can be considered to be broadly representative of bowls clubs from across Australia.

CHART 1 – GEOGRAPHIC DISTRIBUTION OF SURVEY RESPONSES

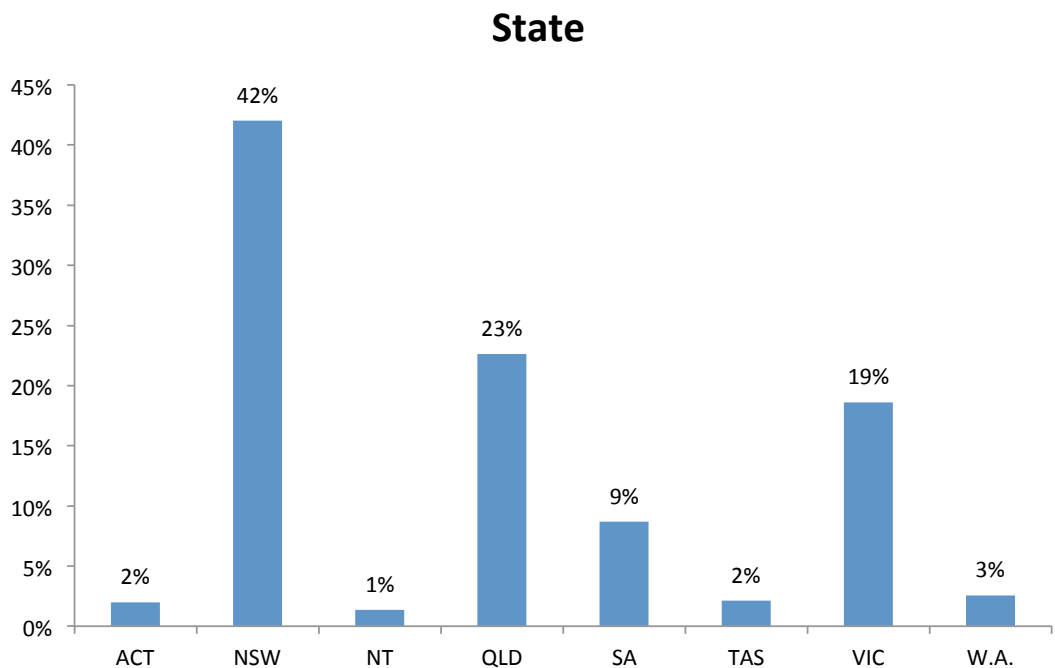


Chart 2 shows the age distribution of respondents from across Australia, that broadly matches the age distribution of members found in the Bowls Australia Census data.

CHART 2 – AGE DISTRIBUTION OF SURVEY RESPONSES

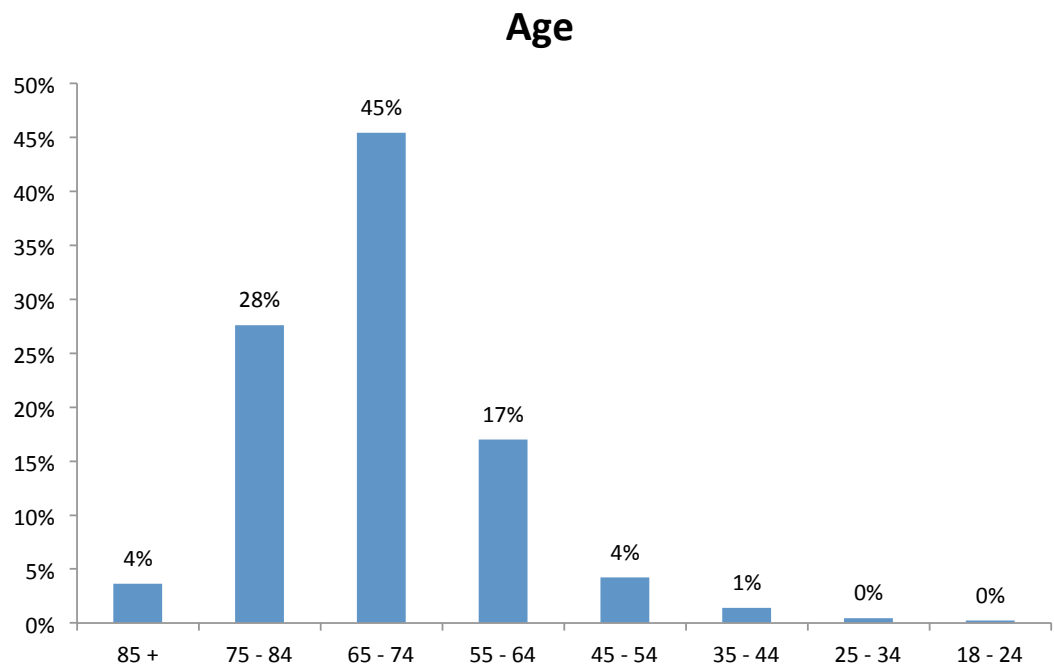


Chart 3 shows the length of time respondents had lived in Australia who indicated that they had been born overseas, that indicates that very few respondents (5%) could be considered newly arrived to Australia (i.e. in the last 10 years).

CHART 3 – YEARS LIVED IN AUSTRALIA FOR THOSE BORN OVERSEAS

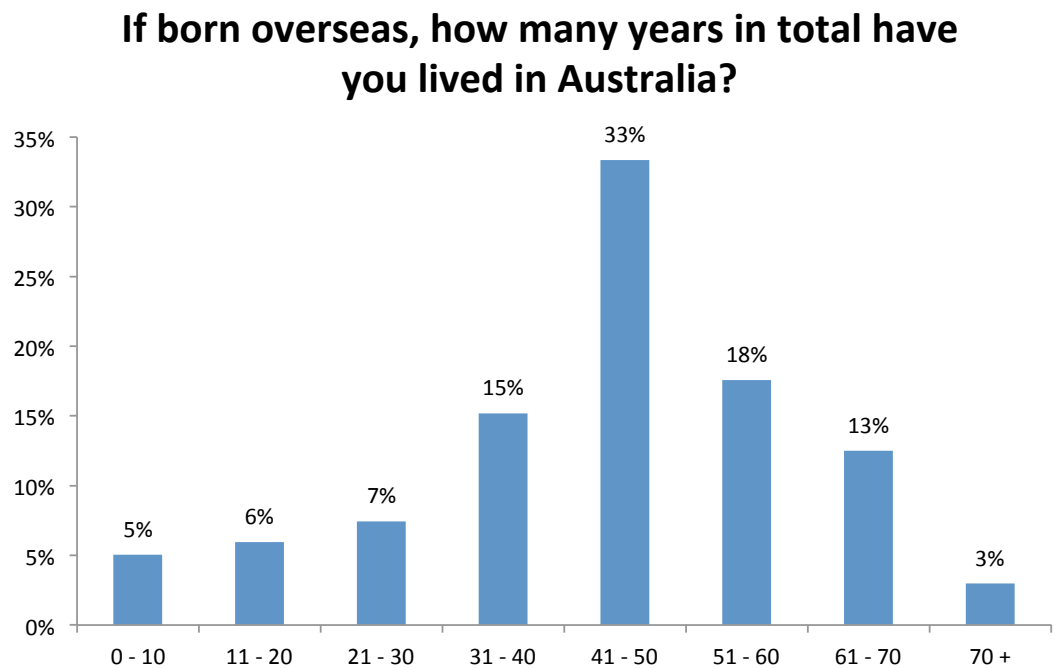


Chart 4 shows the education profile of respondents that indicates that relatively few respondents (13%) have university education. This is likely a reflection of the age profile of bowls club members who were less likely to receive university education compared to people born more recently in Australia.

CHART 4 – EDUCATION PROFILE OF SURVEY RESPONDENTS

What is the highest level of education you have completed?

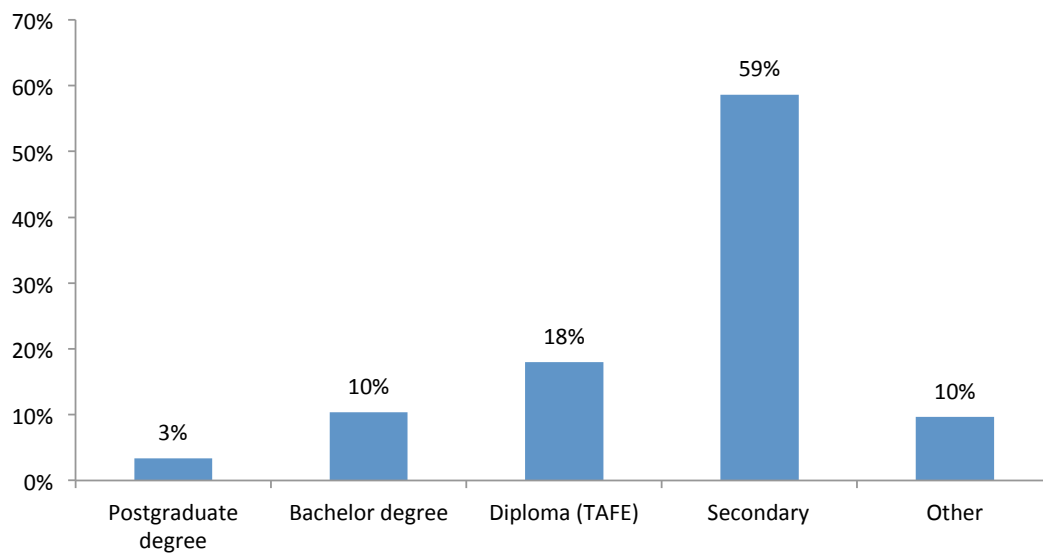


Chart 5 shows the employment profile of respondents that indicates that the majority of respondents (85%) are retired or not working.

CHART 5 – EMPLOYMENT PROFILE OF SURVEY RESPONDENTS

Do you work full-time, part-time or are you retired?

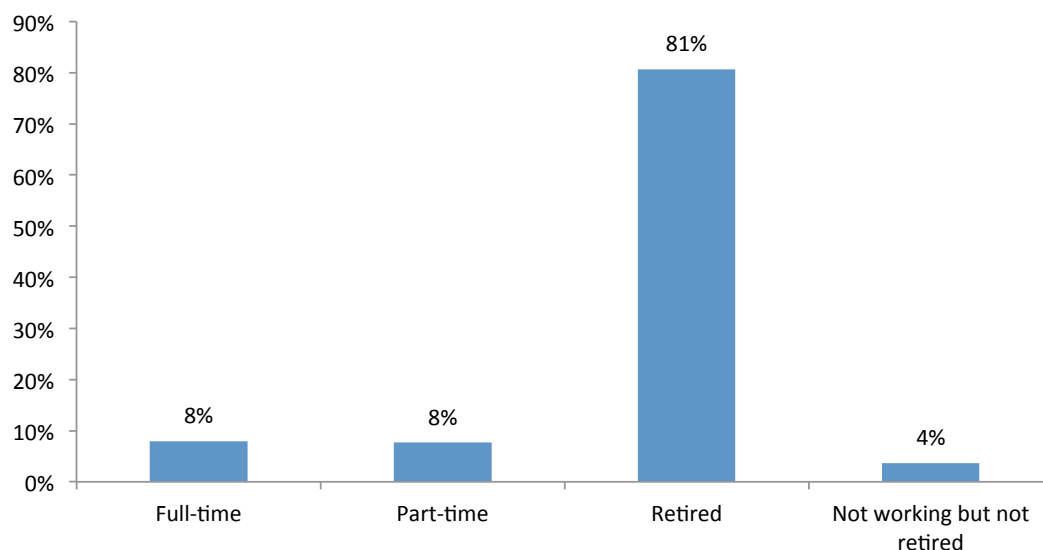


Chart 6 shows the personal income profile of respondents that indicates that the majority of respondents (68%) earn less than \$40,000 p.a., a reflection of the retirement status of most respondents.

CHART 6 – PERSONAL ANNUAL INCOME PROFILE OF SURVEY RESPONDENTS

Which one of the following categories best describes your total PERSONAL annual income before tax?

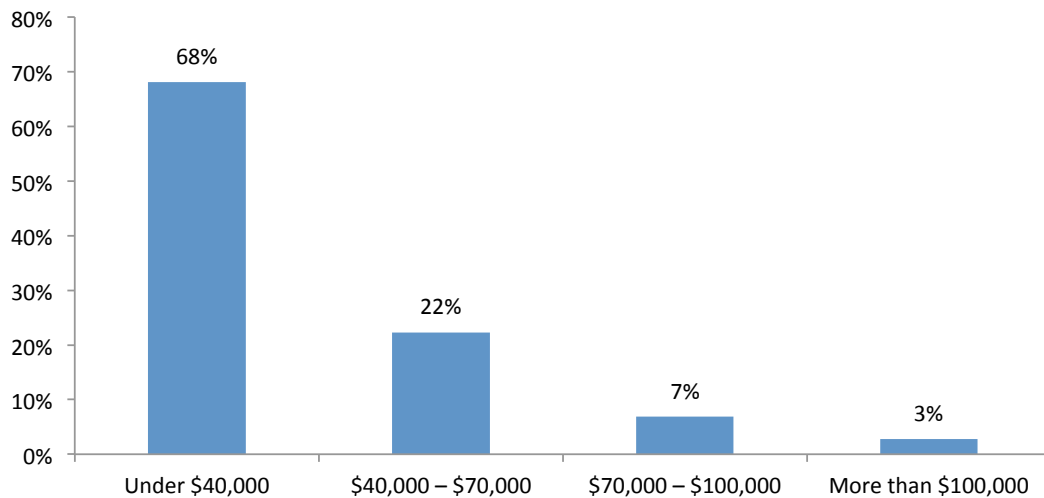
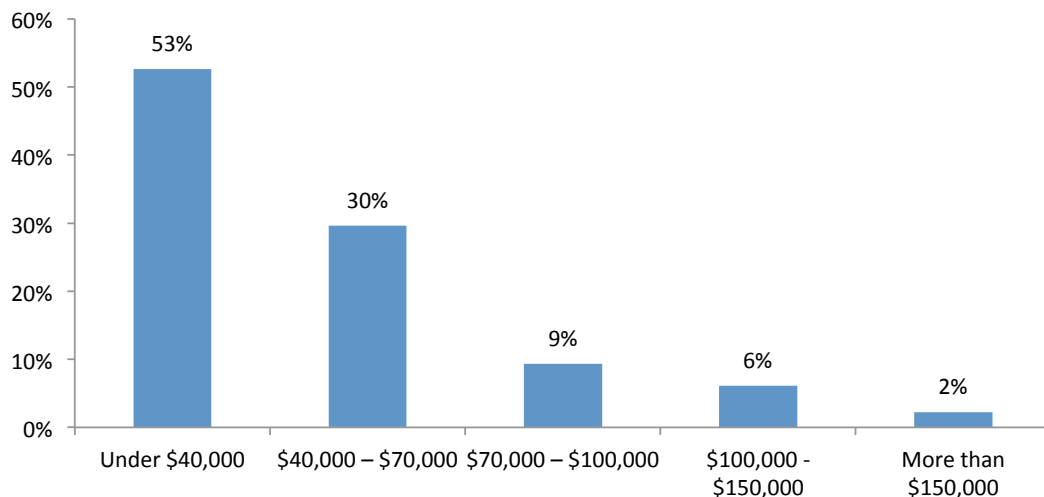


Chart 7 shows the household income profile of respondents that indicates that the majority of households of respondents (53%) earn less than \$40,000 p.a., also a reflection of the retirement status of most respondents.

CHART 7 – HOUSEHOLD ANNUAL INCOME PROFILE OF SURVEY RESPONDENTS

Which one of the following categories best describes your total HOUSEHOLD annual income before tax?



Key points on demographic profile of respondents

- The profile of survey respondents' broadly reflects that from the Bowls Australia Census data.
- The majority of respondents are of retirement age, earn less than \$40,000 p.a., are born in Australia and if born overseas have been living in Australia for more than 10 years.

Individuals' involvement in Bowls

Chart 8 shows the number of years respondents have been involved with their current club and indicates that the majority of respondents (67%) have been involved with their club for 6 years or more.

CHART 8 – TENURE PROFILE OF SURVEY RESPONDENTS

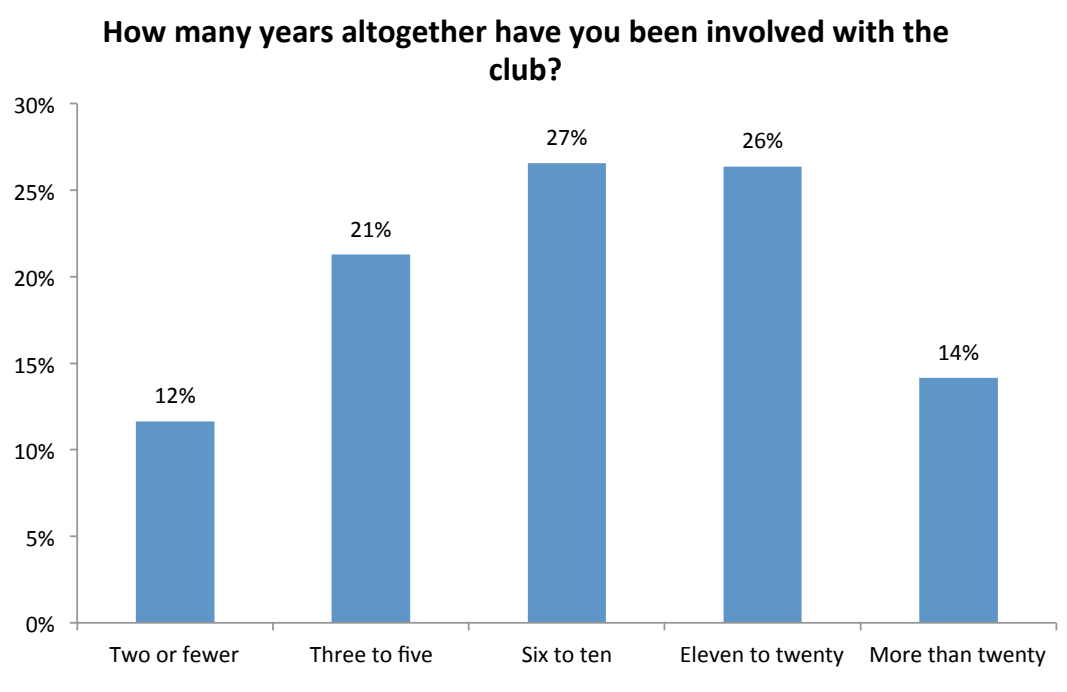


Chart 9 shows the number of years respondents have been involved with their current club with comparisons between states and indicates that the pattern of club involvement does not vary significantly between states.

CHART 9 – TENURE PROFILE OF SURVEY RESPONDENTS (BY STATE)

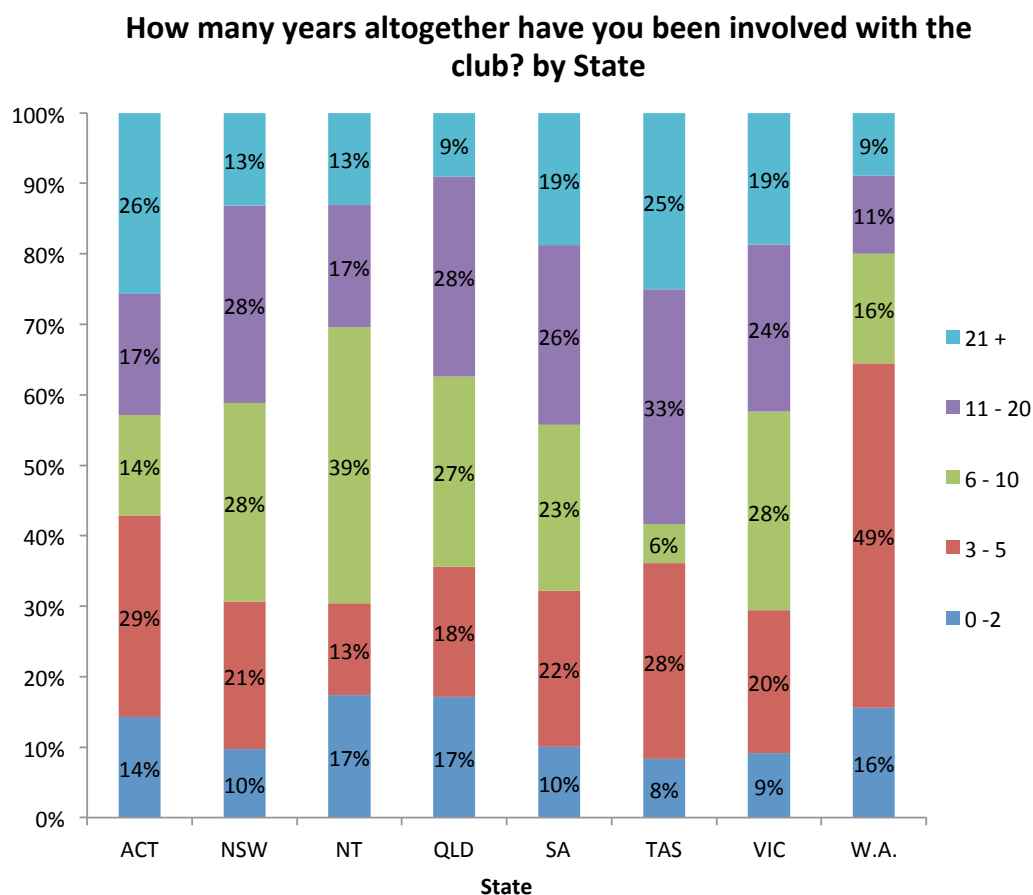


Chart 10 shows the number of hours per week respondents spend involved with activities at their current club and indicates that the majority of respondents (66%) spend more than 10 hours per week involved with their club.

CHART 10 – HOURS PER WEEK SPENT ON CLUB ACTIVITIES

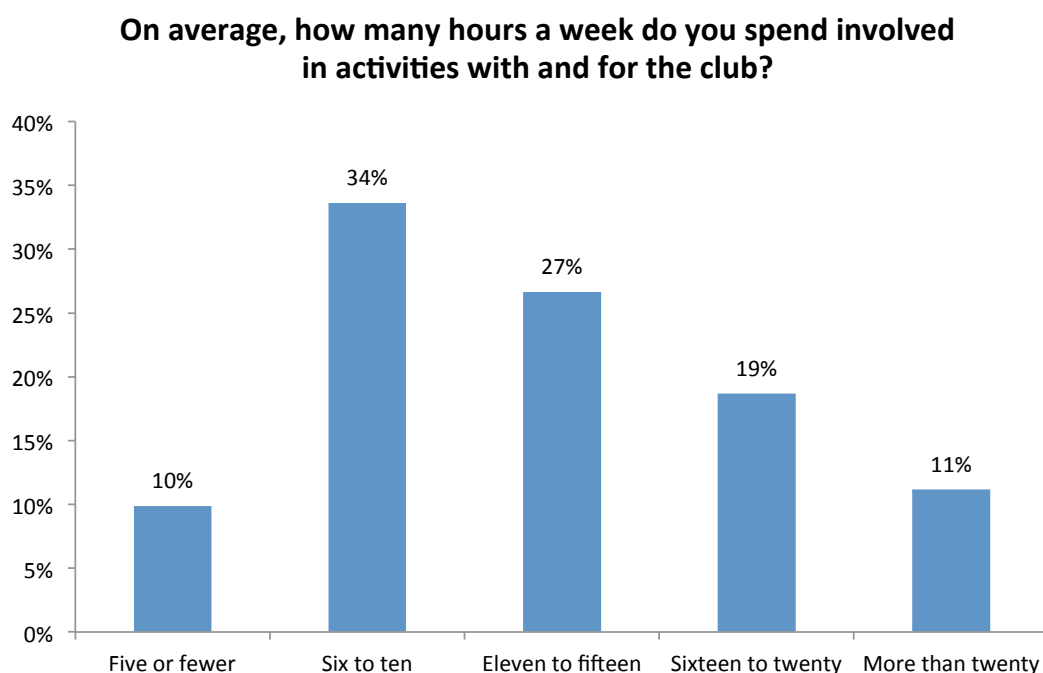


Chart 11 shows the number of hours per week respondents spend involved with activities at their current club per State and indicates that the pattern of club involvement does not vary significantly between states.

CHART 11 – HOURS PER WEEK SPENT ON CLUB ACTIVITIES (BY STATE)

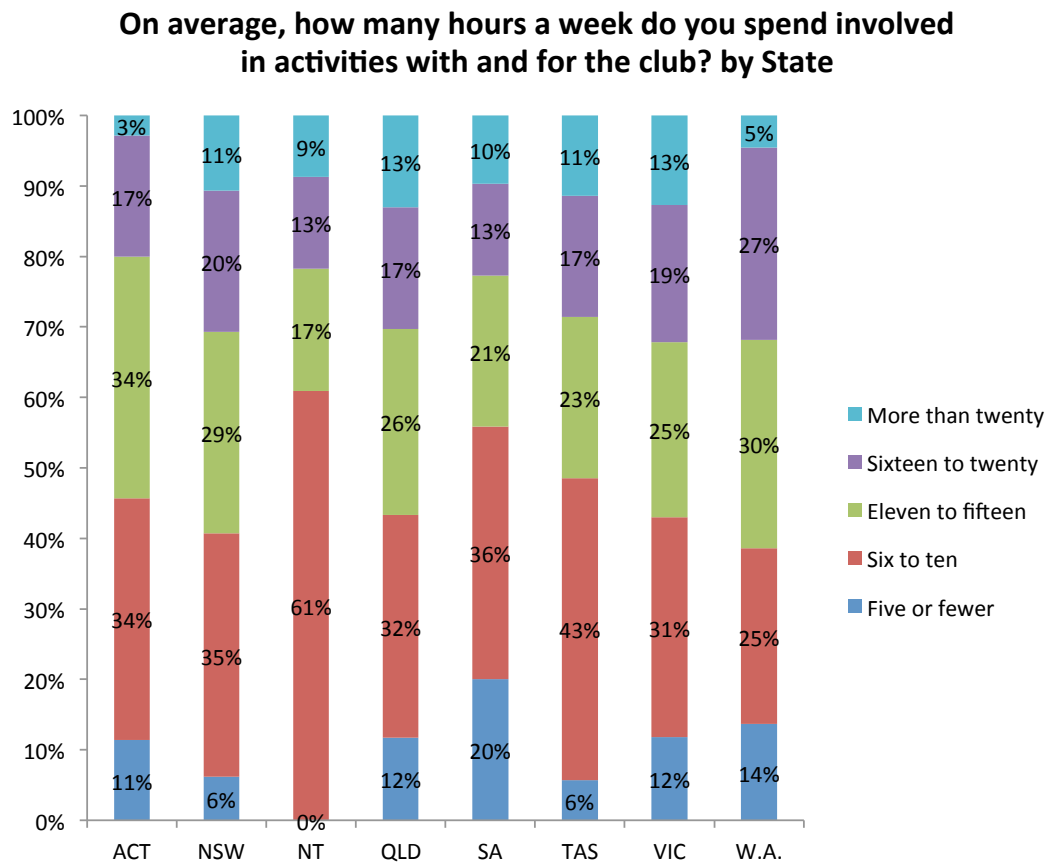


Chart 12 shows the number of times per month respondents spend involved with activities at their current club and indicates that the majority of respondents (72%) attend their club 11 or more times per month.

CHART 12 – TIMES PER MONTH ATTENDING THEIR CLUB

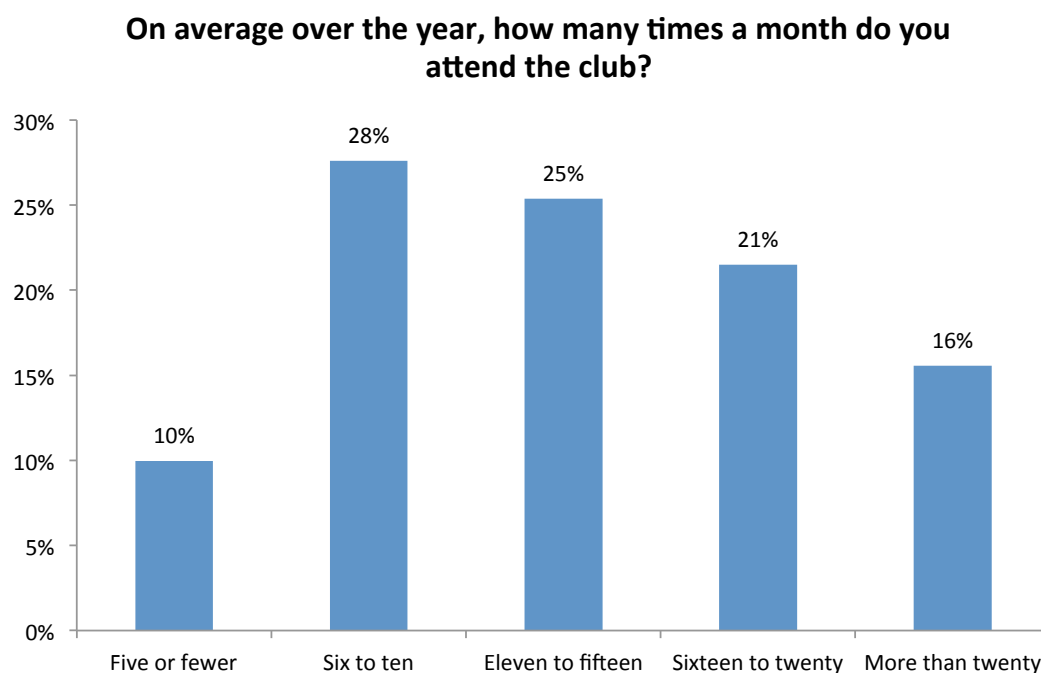


Chart 13 shows the number of times per month respondents spend involved with activities at their current club per State and indicates that the pattern of club involvement does not vary significantly between states.

CHART 13 – TIMES PER MONTH ATTENDING THEIR CLUB (PER STATE)

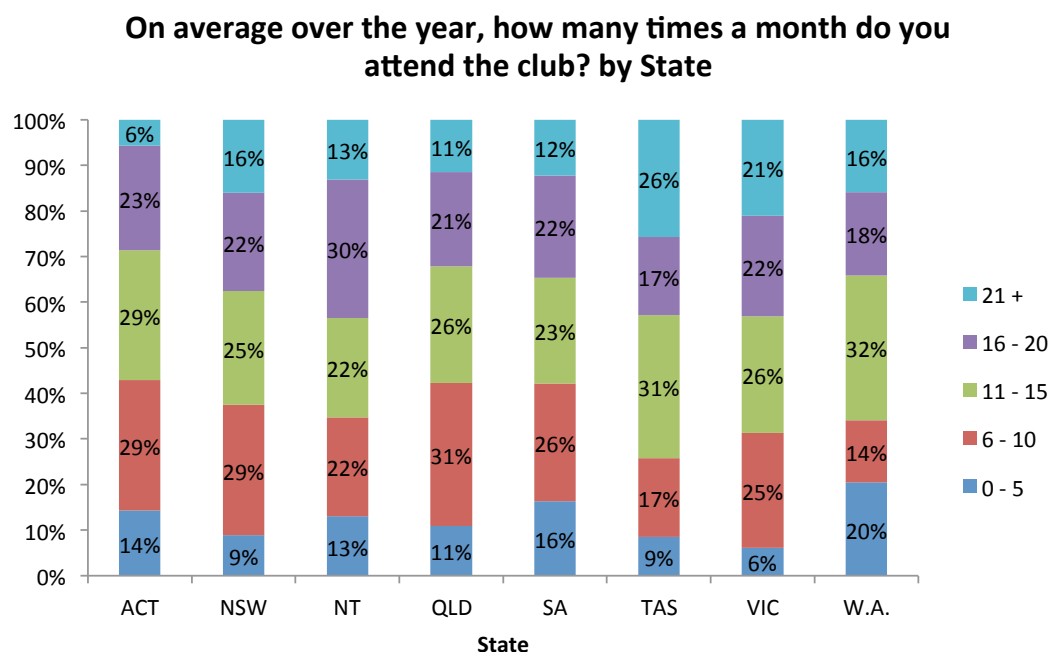


Chart 14 shows the number of times per month respondents spend involved with activities at their current club per Gender and indicates that the pattern of club involvement does vary slightly for men and women with males visiting their club more often than women.

CHART 14 – TIMES PER MONTH ATTENDING THEIR CLUB (PER GENDER)

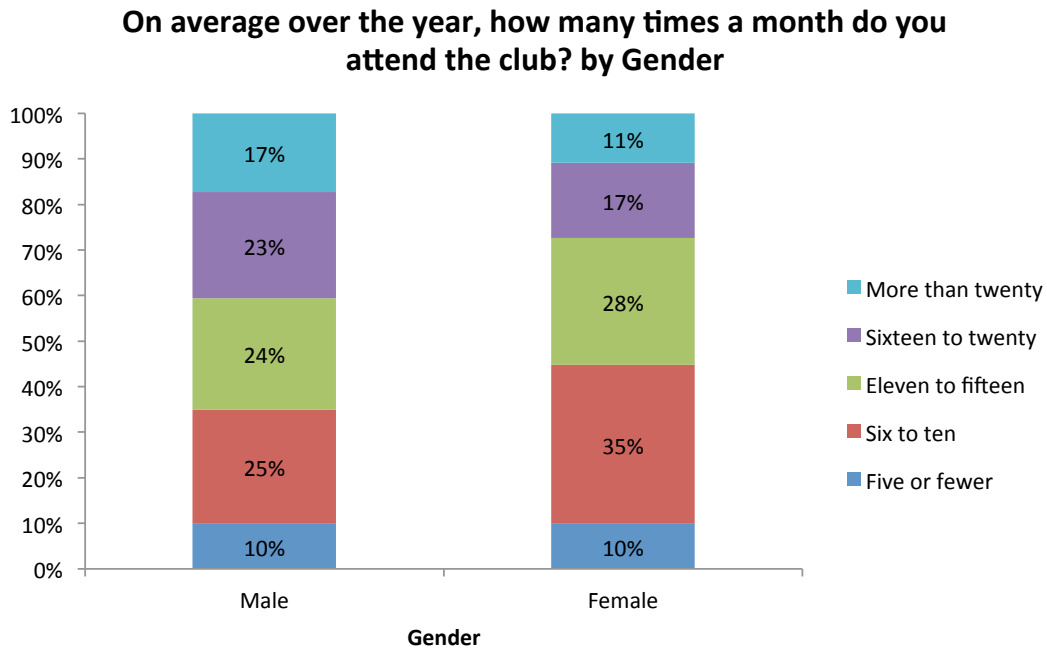
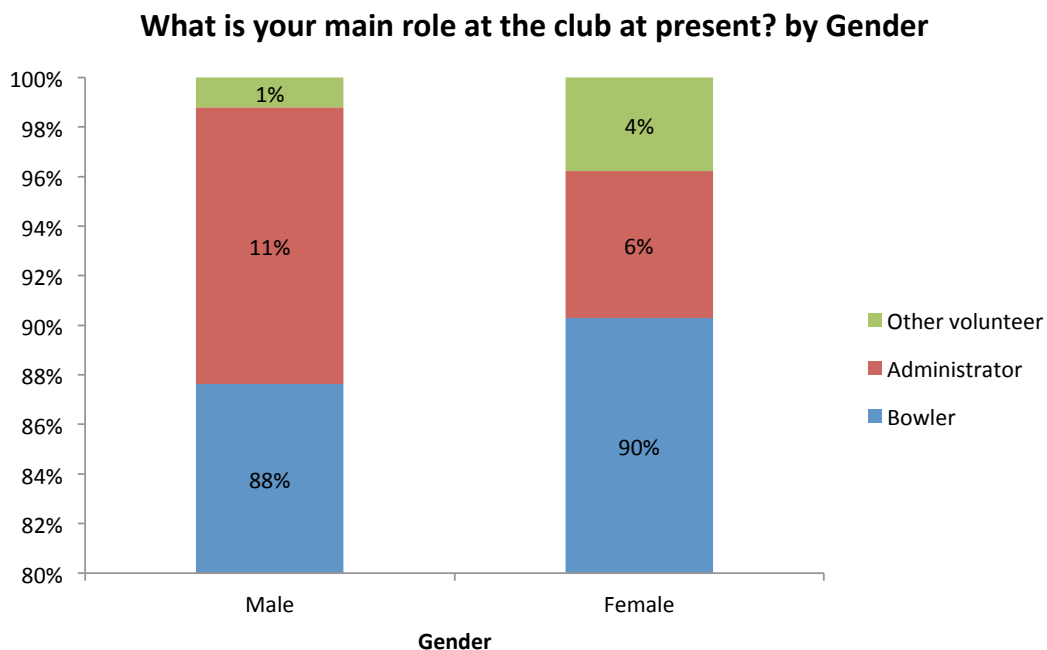


Chart 15 shows the roles of respondents at their current club per Gender and indicates that the pattern of club involvement does vary slightly for men and women with males being more involved with administration roles than women.

CHART 15 – CLUB ROLE OF RESPONDENTS (PER GENDER)



Key points on club involvement profile of respondents

- The pattern of club involvement does not vary significantly by State.
- Most club members have been involved with their club for more than 6 years, visit the club more than 10 times per month, spend at least 10 hours per week.

Motives for involvement with bowls

Chart 16 shows the importance respondents ascribe to six motives for their participation in bowls. These six motives were identified in the interviews as encompassing the scope of motives for bowls participation. This chart indicates that the most significant reasons people choose to participate in bowls is the sense of camaraderie and belonging from being part of a team sport and the social connections that participation in bowls provides. As highlighted in the interview results, only a small minority consider a place for social drinking within a club environment to be an important motive. These motives do not vary by State, or any other demographic variable.

CHART 16 – MOTIVES FOR BOWLS PARTICIPATION

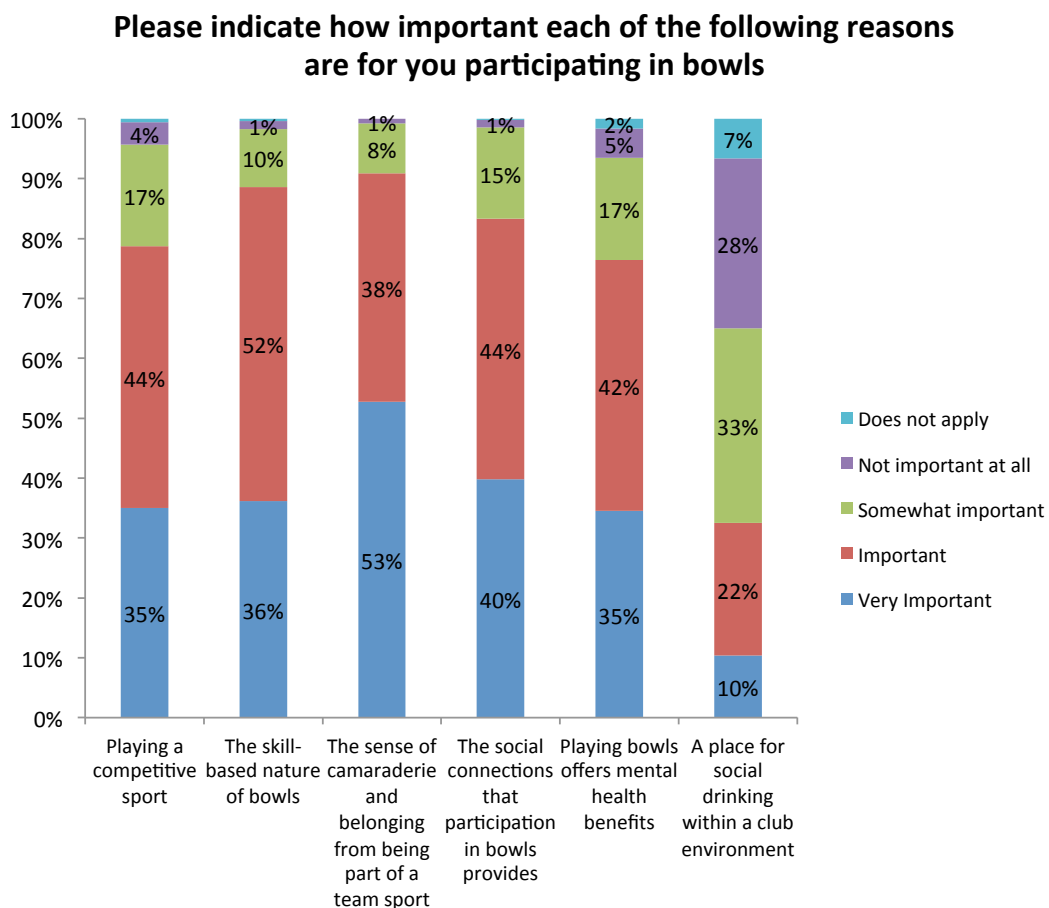


Chart 17 shows the importance respondents ascribe to the sense of camaraderie and belonging from being part of a team sport split by Gender. This chart indicates that this is more important for women than men.

CHART 17 – CAMARADERIE MOTIVE FOR BOWLS PARTICIPATION (BY GENDER)

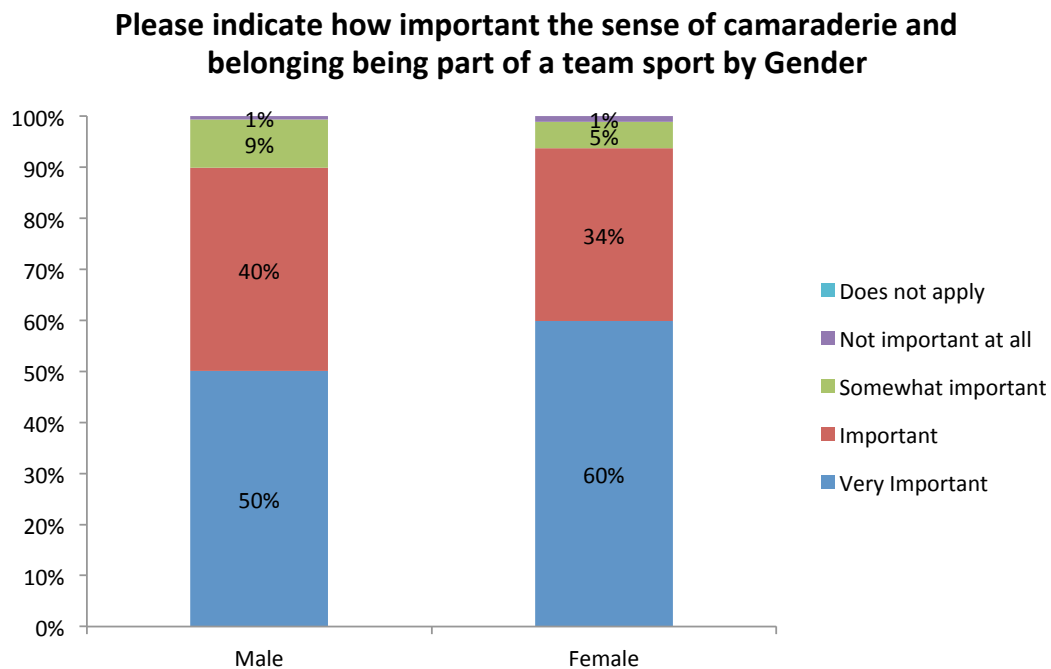


Chart 18 shows the importance respondents ascribe to the social connections that participation in bowls provides split by Gender. This chart indicates that this is also more important for women than men.

CHART 18 – SOCIAL CONNECTIONS MOTIVE FOR BOWLS PARTICIPATION (BY GENDER)

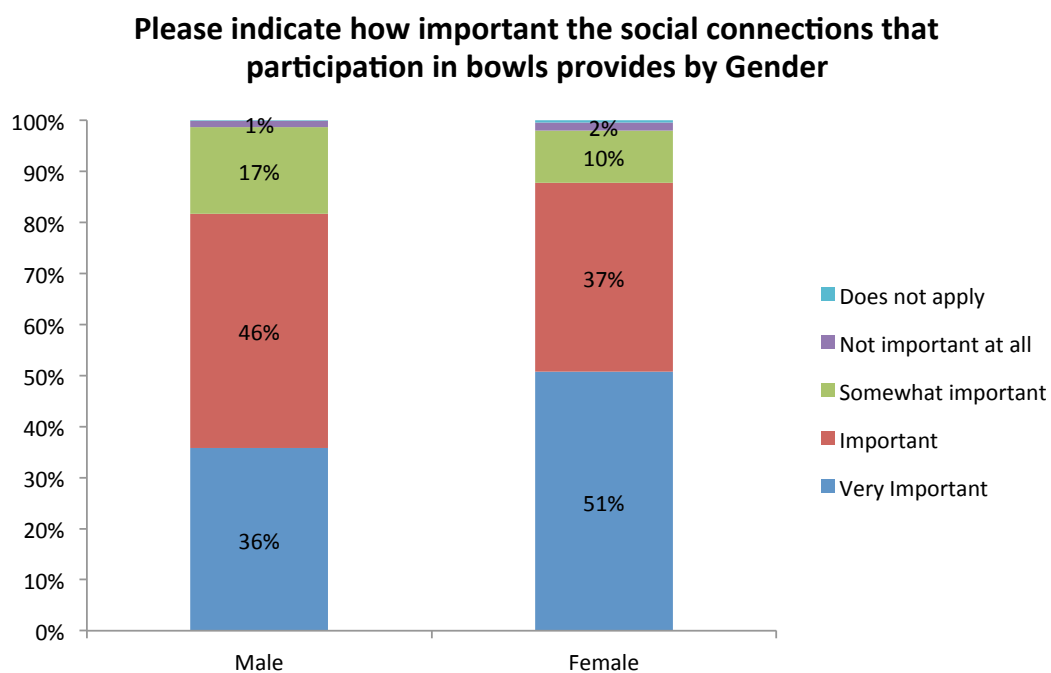
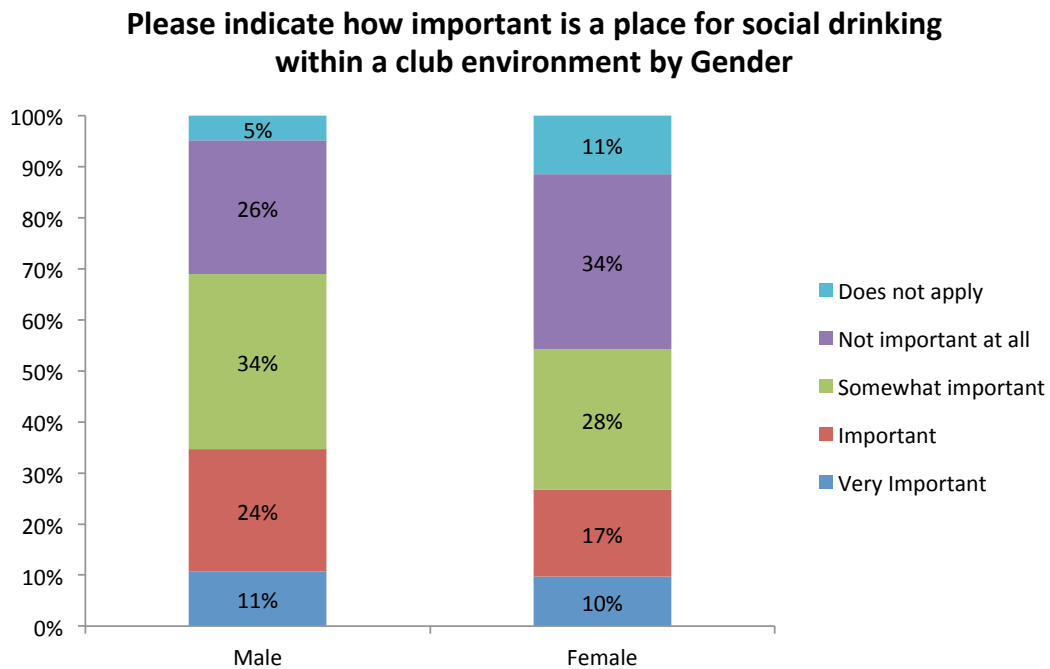


Chart 19 shows the importance respondents ascribe to having a place for social drinking within a club environment to be a motivating factor split by Gender. This chart indicates that this is more important for men than women.

CHART 19 – SOCIAL DRINKING MOTIVE FOR BOWLS PARTICIPATION (BY GENDER)



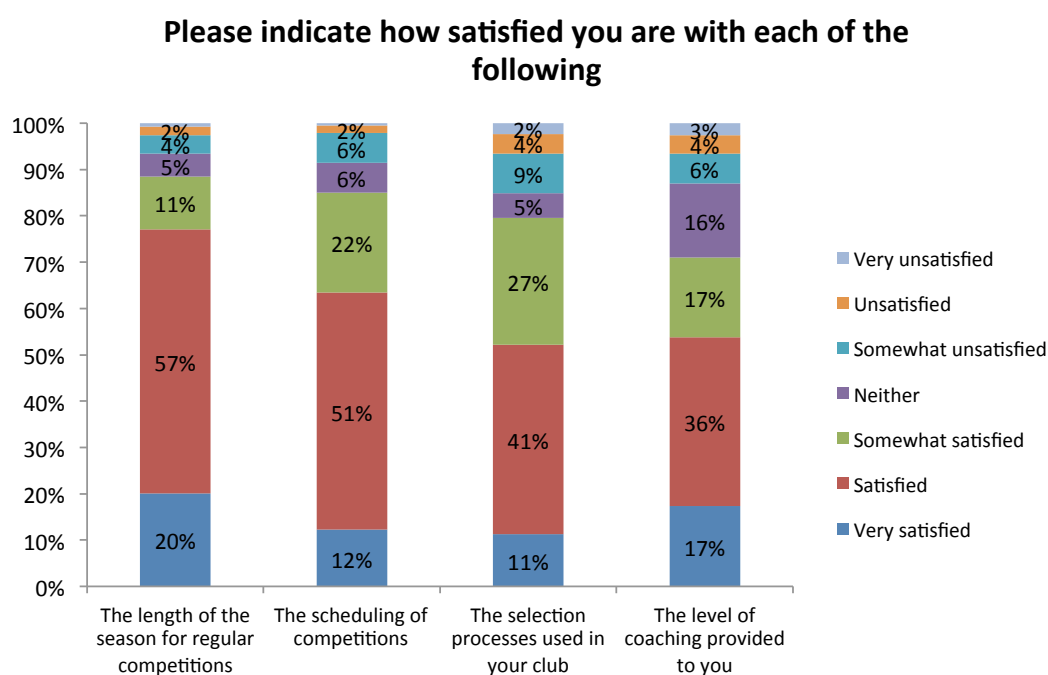
Key points on motives for bowls participation

- The most important motives for participation in bowls are the sense of camaraderie and belonging from being part of a team sport and the social connections that participation in bowls provides, both of whom are higher for women than men.
- As highlighted in the interview results, only a small minority consider a place for social drinking within a club environment to be an important motive, and more so for men than women.

Satisfaction with bowls experiences

Chart 20 shows the level of satisfaction of respondents with four key elements of the bowls experience that were identified in the interviews. This chart indicates that the majority of respondents are satisfied or very satisfied with the length of the season for regular competitions (77%) and with the scheduling of competitions (63%). Only 52% of respondents are satisfied or very satisfied with the selection processes in their club and only 53% with the level of coaching provided to them.

CHART 20 – SATISFACTION WITH BOWLS EXPERIENCE



Given the role that coaching has in retaining bowlers and possibly transitioning casual bowlers to more long term participants, the following analysis has been provided. Chart 21 shows the level of satisfaction of respondents with the level of coaching provided to them per State. This chart indicates that there is a significant portion of bowlers in each state that indicate some dissatisfaction with the coaching provided to them.

CHART 21 – SATISFACTION WITH LEVEL OF COACHING (BY STATE)

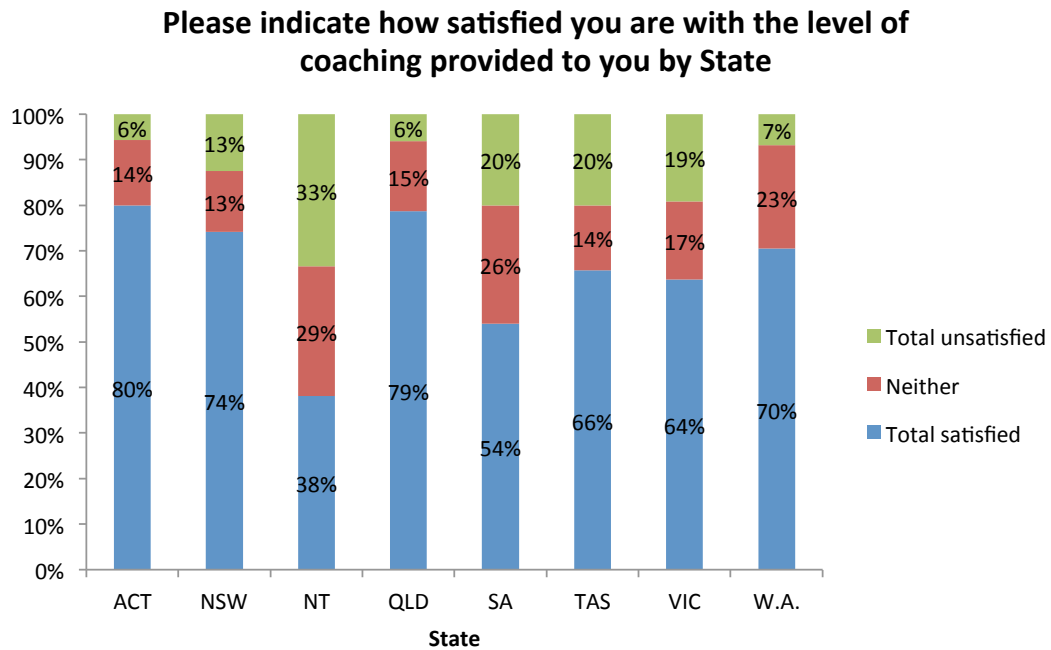


Chart 22 shows the level of satisfaction of respondents with the level of coaching provided to them split by Gender. This chart indicates that the level of satisfaction is higher among women than men, possibly a reflection that more men are motivated by the instrumental or competitive element of bowling and therefore desire more coaching to succeed on the Bowling Green.

CHART 22 – SATISFACTION WITH LEVEL OF COACHING (BY GENDER)

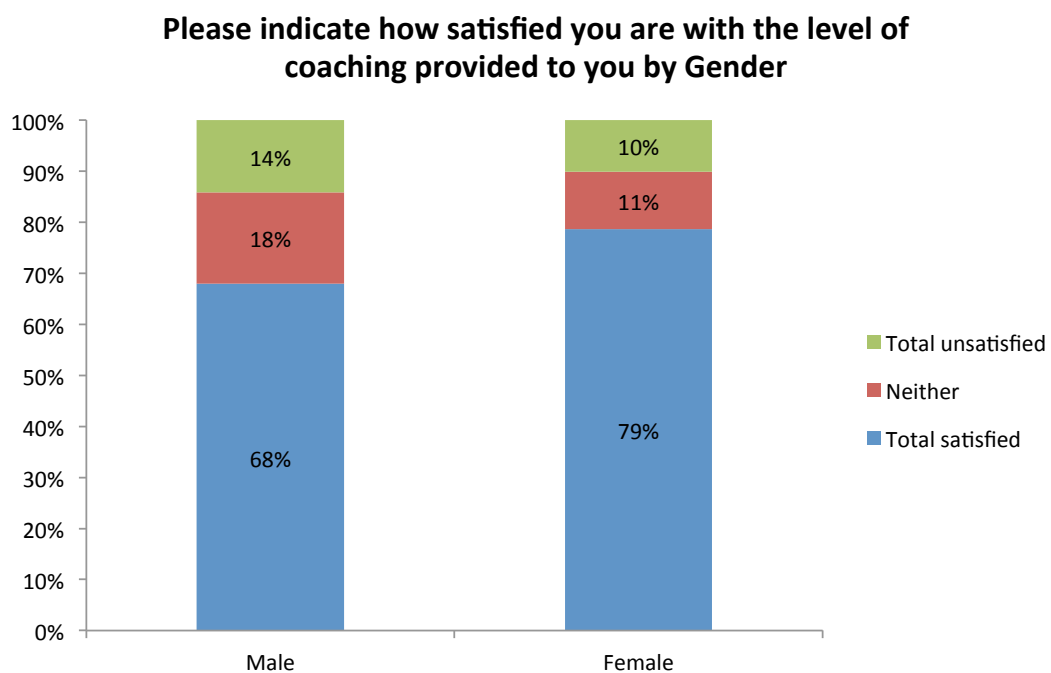
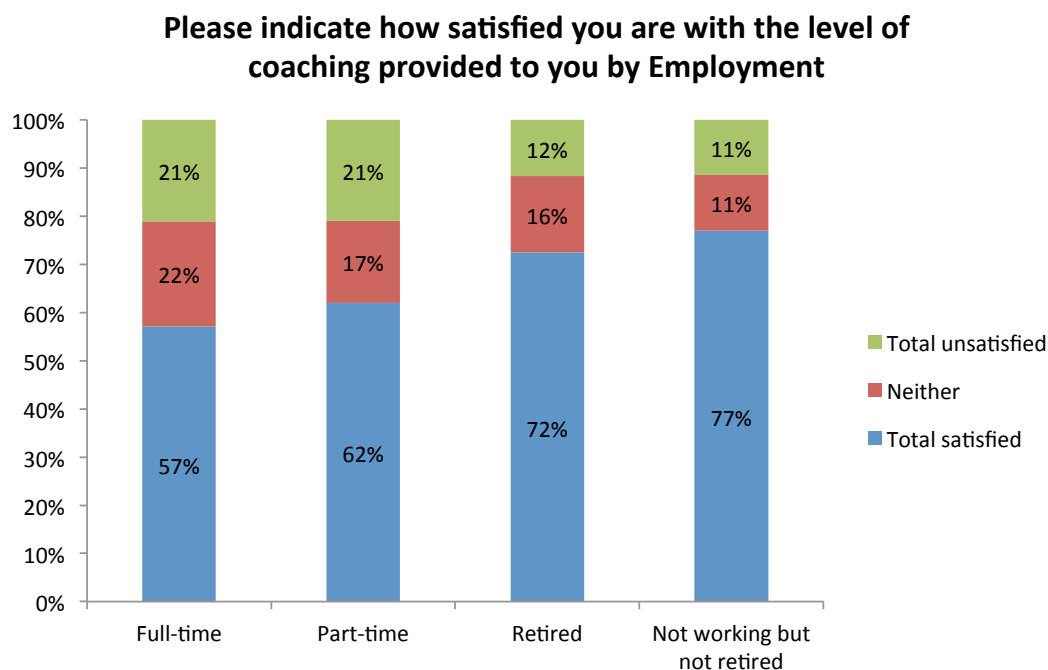


Chart 23 shows the level of satisfaction of respondents with the level of coaching provided to them split by Employment status. This chart indicates that the level of satisfaction is higher among respondents who are retired or not working, possibly a reflection that coaching may not be available at times that suit people who are working (especially those that work full time) more than a statement on the quality of the coaching.

CHART 23 – SATISFACTION WITH LEVEL OF COACHING (BY EMPLOYMENT)



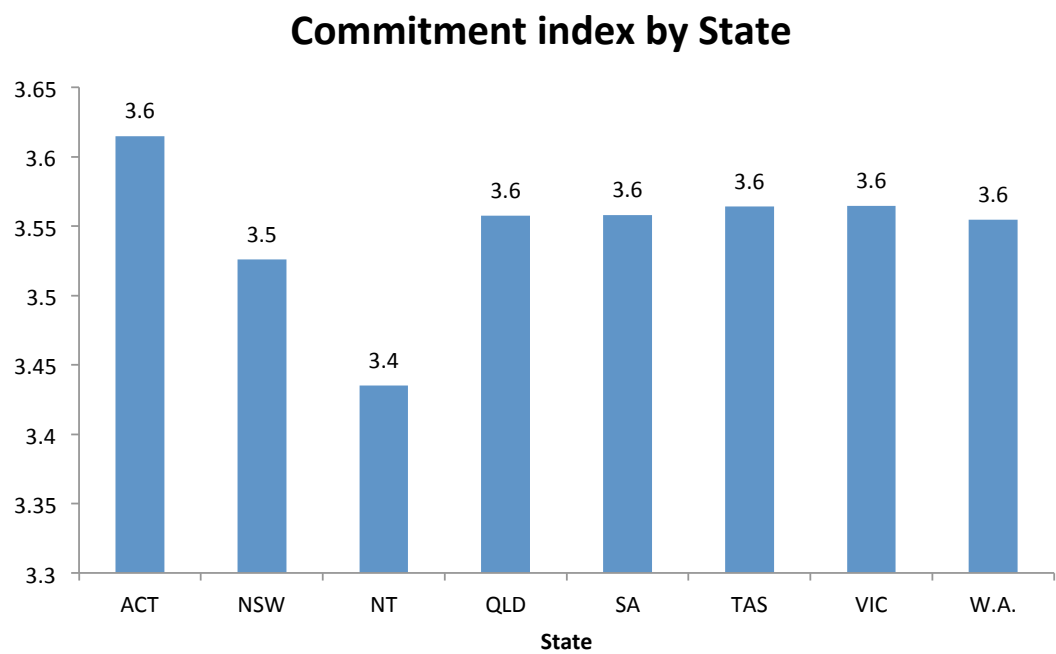
Key points on satisfaction with bowls experience

- The majority of respondents are satisfied or very satisfied with the length of the season for and scheduling of competitions
- The provision of adequate levels of quality coaching and perhaps the timing of its provision seems to be an important driver of satisfaction among bowls participants.

Commitment to remain involved with bowls

To measure commitment of bowlers we asked them a series of questions that were aggregated into an index of commitment. Chart 24 shows the index scores (out of 5) for commitment per State. This chart indicates that there are no statistically significant differences between respondents from States as to their degree of commitment to bowls.

CHART 24 – COMMITMENT TO BOWLS BY STATE



Further tests were conducted to determine whether levels of commitment varied by the nature of respondents’ club involvement or demographic variables. There were no significant differences in levels of commitment to bowls in relation to how long someone had been at a club. Unsurprisingly, however, the level of commitment for respondents increased in relation to how often they attended their club, how many hours per week they devoted to club activities and their role, with administrators being more committed than bowlers. For example, Chart 25 shows the index scores (out of 5) for commitment split by how many hours people attend club activities per week.

CHART 25 – COMMITMENT TO BOWLS BY HOURS PER WEEK

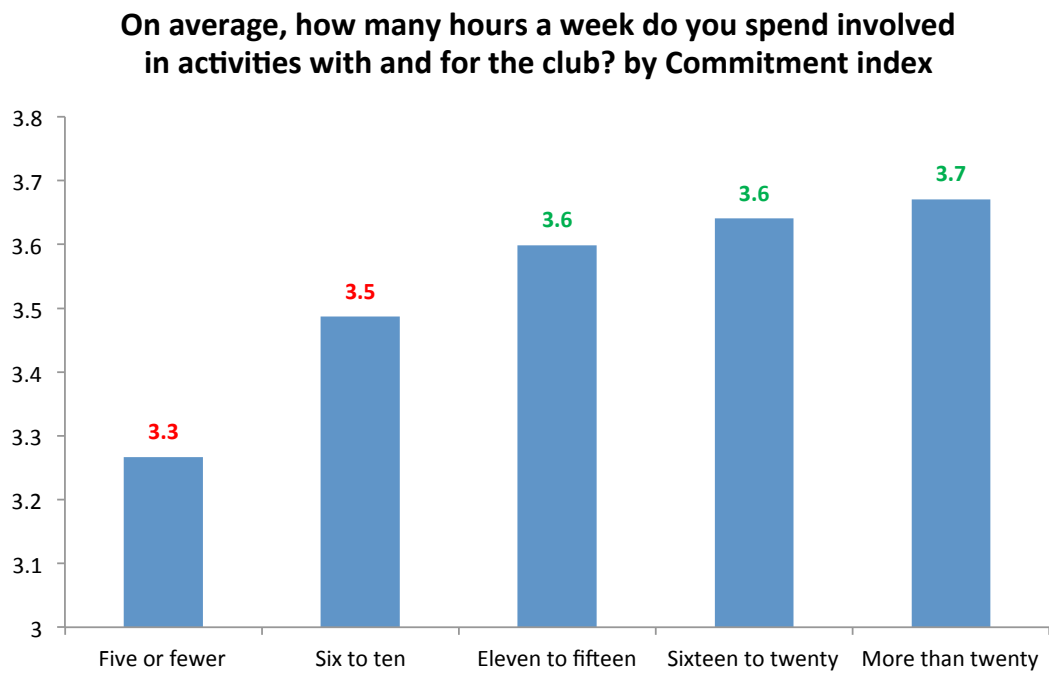
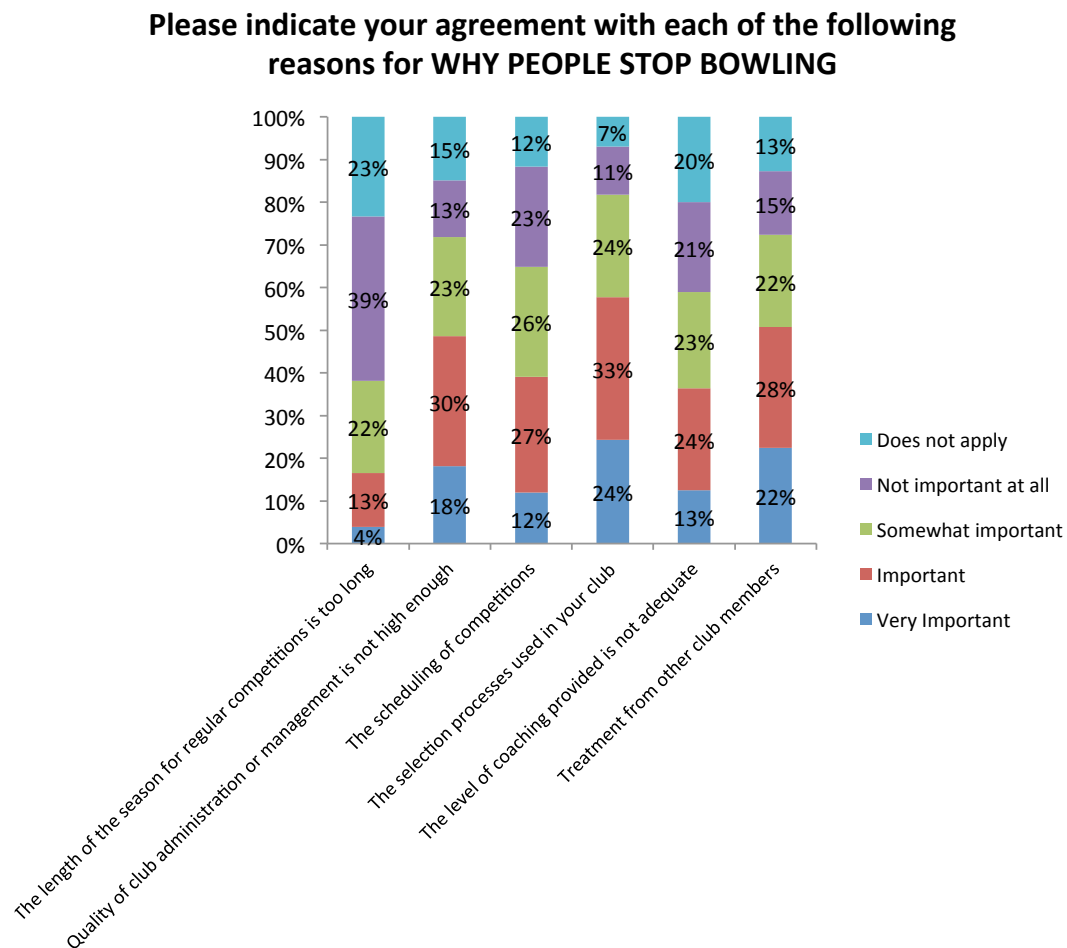


Chart 26 shows the level of importance respondents ascribe to six reasons why people cease bowling that were identified in the interviews. This chart indicates that selection processes, the way individuals are treated by other club members, and the quality of club administration are considered the most important reasons why people cease bowling.

CHART 26 – REASONS PEOPLE CEASE BOWLING



Key points on commitment to bowls

- The majority of respondents are committed to bowls.
- The main reasons respondents believe people cease bowling are selection processes in clubs, the treatment of people by other club members and the quality of club administration.

Perceived physical and mental health status

To measure the physical and mental health status of bowls participants we asked them a series of questions that were aggregated into two indices – one for perceived physical health and one for perceived mental health. Chart 27 shows the index scores for perceived physical health per State. This chart indicates that there are no statistically significant differences between respondents from States aside from New South Wales respondents who had a slightly lower score, and Western Australia respondents who had a slightly higher score relative to respondents from other States. These differences are very small.

CHART 27 – PERCEIVED PHYSICAL HEALTH BY STATE

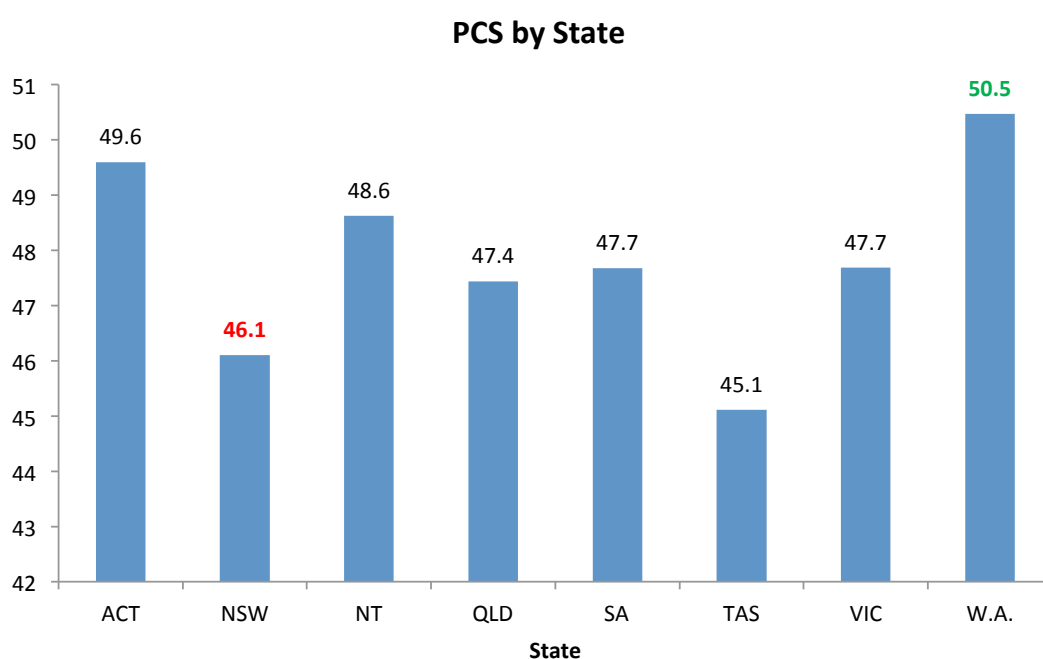
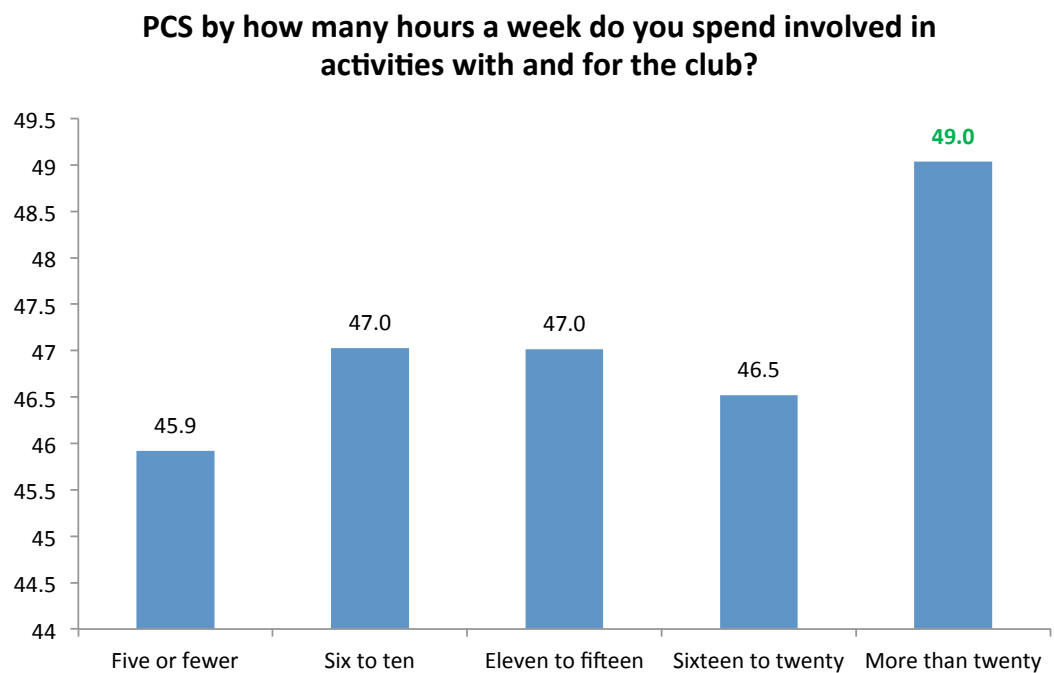


Chart 28 shows the index scores for perceived physical health split by how many hours respondents spend at the club. This chart indicates that those respondents who spend more than 20 hours per week at the club reported higher physical health, possibly due to them bowling more.

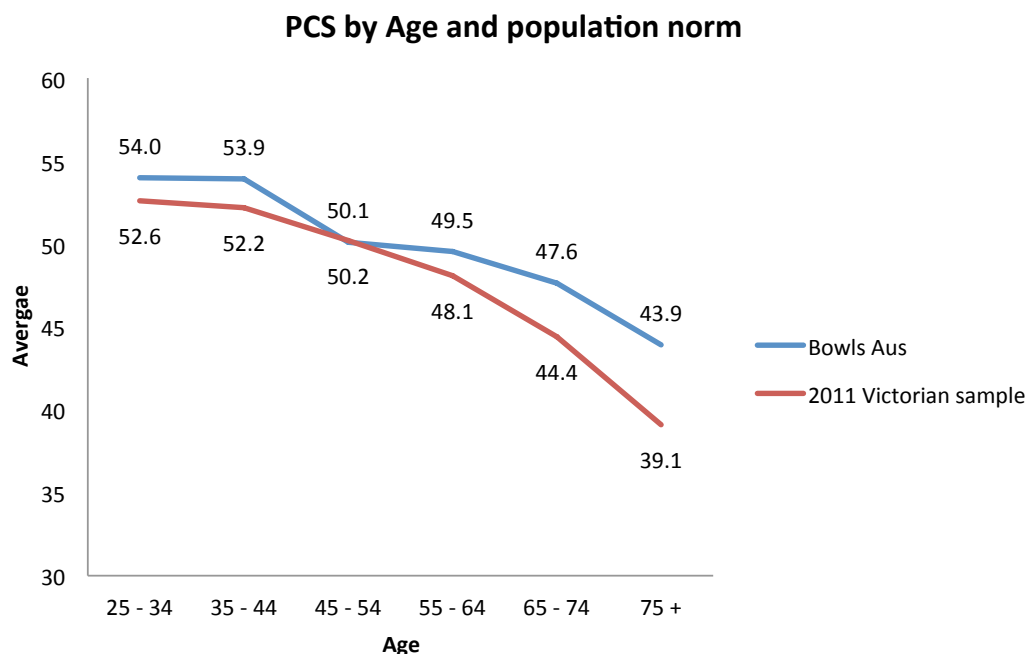
CHART 28 – PERCEIVED PHYSICAL HEALTH BY HOURS SPENT AT CLUB PER WEEK



Further tests were conducted to determine whether levels of perceived physical health were due to respondents’ involvement in bowls compared to other members of the population. One point of comparison can be made by comparing this cohort of respondents to the general population. Chart 29 compares the perceived physical health scores of respondents to a sample of Victorian residents, and highlights that bowlers report higher physical health compared to others.

It is important to note that perceived physical health does not vary by how often people attend their club, suggesting that any form of involvement in bowls is beneficial.

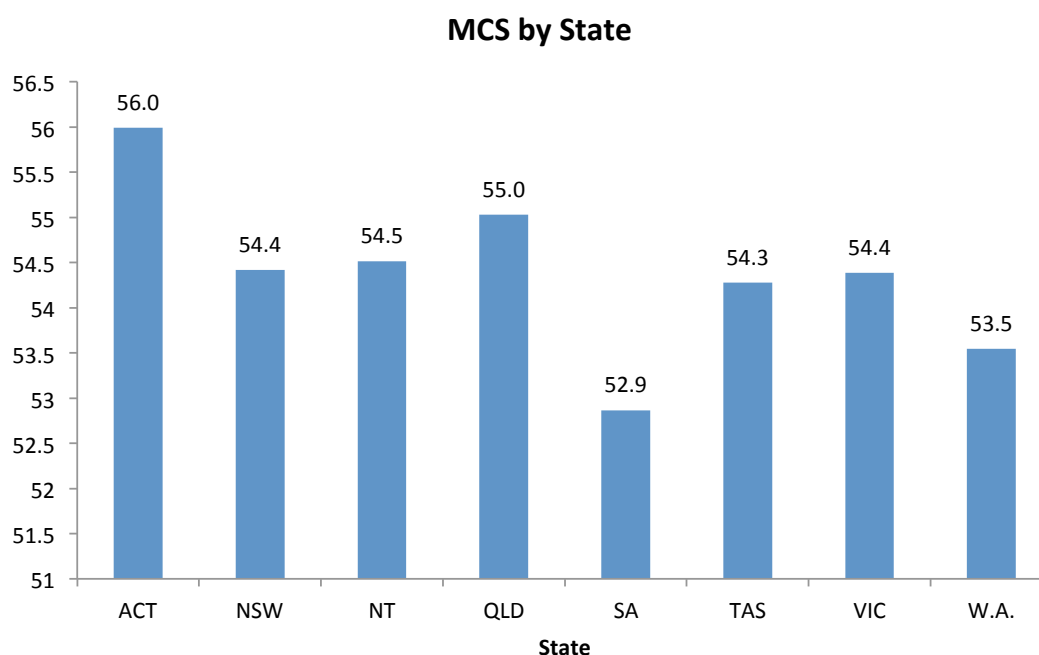
CHART 29 – PERCEIVED PHYSICAL HEALTH BOWLS RESPONDENTS COMPARED TO 2011 VIC STUDY



Source: 'Volunteering and wellbeing: Individual outcomes and organisational practice STAGE 1 Report' March 25, 2011. Professor Russell Hoye; Associate Professor Matthew Nicholson; Associate Professor Kevin Brown; Dr Art Stukas. Report (unpublished) for DPCD.

Chart 30 shows the index scores for perceived mental health per State. This chart indicates that there are no statistically significant differences between respondents from States. Perceived mental health scores also do not vary based on respondents degree of involvement (time per week, tenure or frequency), similar results to other research conducted by the CSSI on volunteering and general sport participation.

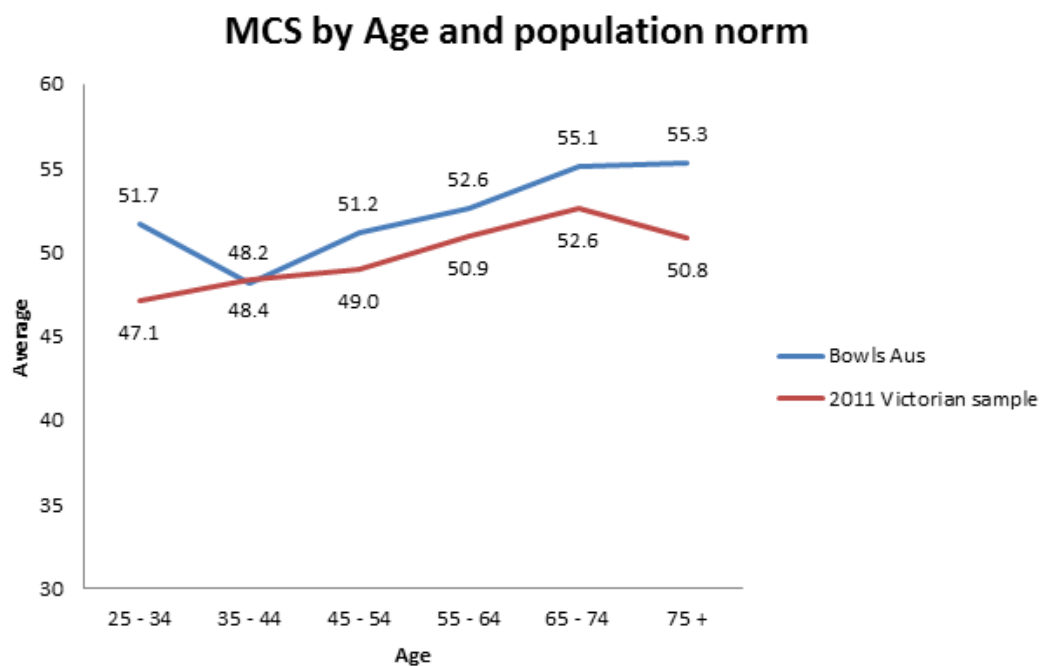
CHART 30 – PERCEIVED MENTAL HEALTH BY STATE



Further tests were conducted to determine whether levels of perceived mental health were due to respondents' involvement in bowls compared to other members of the population. One point of comparison can be made by comparing this cohort of respondents to the general population. Chart 31 compares the perceived mental health scores of respondents to a sample of Victorian residents, and highlights that bowlers report higher mental health compared to others.

It is important to note that perceived mental health does not vary by how often people attend their club, suggesting that any form of involvement in bowls is beneficial.

CHART 31 – PERCEIVED MENTAL HEALTH BOWLS RESPONDENTS COMPARED TO 2011 VIC STUDY



Source: 'Volunteering and wellbeing: Individual outcomes and organisational practice STAGE 1 Report' March 25, 2011. Professor Russell Hoye; Associate Professor Matthew Nicholson; Associate Professor Kevin Brown; Dr Art Stukas. Report (unpublished) for DPCD.

Key points on physical and mental health status

- Respondents report higher physical and mental health status compared to the general population.
- Physical and mental health status do not vary based on the degree of involvement (aside from bowlers who attend more than 20 hours per week reporting higher physical health), suggesting that any form of involvement in bowls is beneficial for both physical and mental health.

Conclusions

The following conclusions are made in relation to the six questions that formed the basis for this study.

Why do people play bowls?

1. Most interviewees came to bowls from other competitive sports, and thus bowls provides the opportunity to continue to enjoy competitive and team aspects of sport.
2. Bowls provided a viable opportunity for individuals of different skill levels to fully participate and enjoy the experience.
3. Many interviewees had held less than positive assumptions about bowls (that are also found in the wider community) that were only changed by a direct experience such as a social function or an introduction by a friend/neighbour to bowls.
4. Many interviewees spoke of themselves as a bowler in the sense of being in a space where they realised that 'outsiders' did not understand and held in low regard what they did and enjoyed.
5. As is the case with many other minority sports and pursuits, bowls members typically felt that non-bowlers did not understand or appreciate the advantages of bowls. To a certain extent this cemented their identity as 'bowlers' and provided a sense of solidarity with other members that can be a valuable resource for clubs when managed correctly.
6. Bowls is a sport that has some unique attributes; specifically being able to offer people of all ages and abilities a chance to play.
7. Bowls provides significant opportunities for social connections and friendships to develop that contribute to wellbeing.
8. The survey results confirmed the interview results in that the most important motives for participation in bowls are the sense of camaraderie and belonging from being part of a team sport and the social connections that participation in bowls provides, both of which are higher for women than men.
9. As highlighted in the interview results, the survey found that only a small minority consider a place for social drinking within a club environment to be an important motive, and more so for men than women.

Why do people cease playing bowls?

10. The main reasons respondents believe people cease bowling are selection processes in clubs, the treatment of people by other club members and the quality of club administration.
11. The areas where clubs can improve their retention of members is in fostering an inclusive club culture, educating members in how to welcome and integrate new members and in improving their governance and management practices.

What are the physical and mental health benefits of playing bowls?

12. Bowls facilitates long lasting friendships that are often a central feature of the social support network for older people who may have lost their partner.
13. Bowls can offer a family friendly environment.
14. Bowls offers players of varying physical ability the chance to compete with each other in an integrated sport participation opportunity.
15. Participation in bowls assists in sustaining both physical and mental health.
16. Bowls clubs are safe social spaces for women.
17. Bowls participants can be grouped into 5 broad categories – consumers, bowlers, socialisers, clubbers and identifiers – each seeking something different from their bowls experience.
18. The survey results confirmed the views of interviewees in that respondents reported higher physical and mental health status compared to the general population.
19. Physical and mental health status does not vary based on the degree of involvement (aside from bowlers who attend more than 20 hours per week reporting higher physical health), suggesting that any form of involvement in bowls is beneficial for both physical and mental health.

How are changes in demographics of communities affecting bowls clubs?

20. Membership decline is a pervasive problem throughout bowls.
21. Clubs appear ill-equipped to deal with diverse population groups and need assistance in how to communicate with and market themselves to local communities.
22. Clubs are facing a number of key challenges, specifically in relation to the way in which they manage their business, the increasing financial pressures to run a club and their future leadership capacity.
23. The profile of survey respondents' broadly reflects that from the Bowls Australia Census data.
24. The majority of respondents are of retirement age, earn less than \$40,000 p.a., are born in Australia and if born overseas have been living in Australia for more than 10 years.
25. The pattern of club involvement does not vary significantly by State.
26. Most club members have been involved with their club for more than 6 years, visit the club more than 10 times per month, and spend at least 10 hours per week at their club.

What format for participation/competition bowls is preferred for different age groups?

- 27. The majority of respondents are satisfied or very satisfied with the length of the season for and scheduling of competitions.
- 28. The provision of adequate levels of quality coaching and perhaps the timing of its provision seems to be an important driver of satisfaction among bowls participants.

What are the characteristics of the “bowls experience” that will attract new participants?

- 29. The length of the Pennant season should be reviewed to maximise its appeal to a diverse market.
- 30. More flexible scheduling of competitions should be investigated as a way of maximising participation.
- 31. Selection processes are important drivers of club member satisfaction.
- 32. Clubs should consider how they can be more accommodating of a diverse set of potential users of their facilities and services.
- 33. Mixed competition structures should be encouraged.
- 34. Shortened game times seem to have been well accepted by the bowls community.
- 35. A key challenge for bowls is to offer a desirable bowls format that fits between casual bowling and Pennant competition that will attract a market that clearly does not want to play Pennant in its current form.



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