



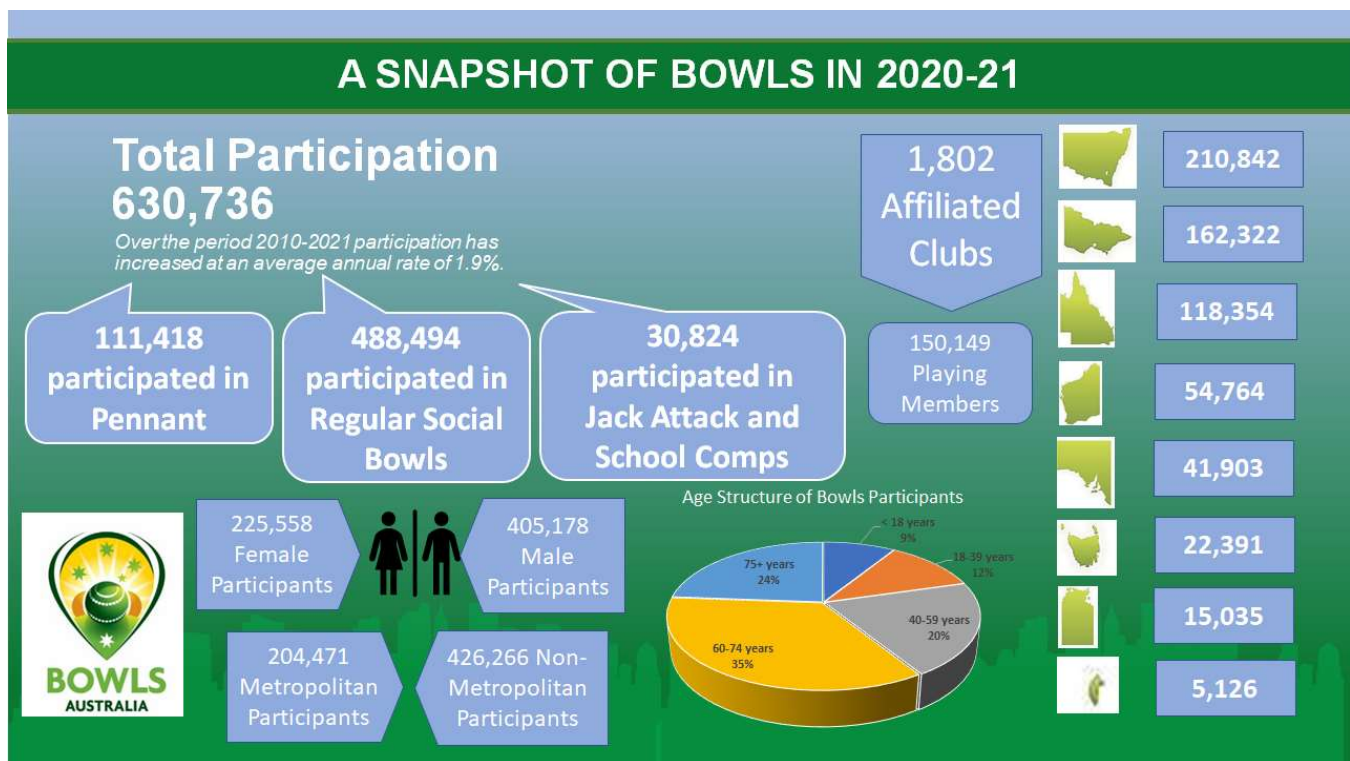
NATIONAL PARTICIPATION CENSUS: 2020-21



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EXECUTIVE SUMMARY

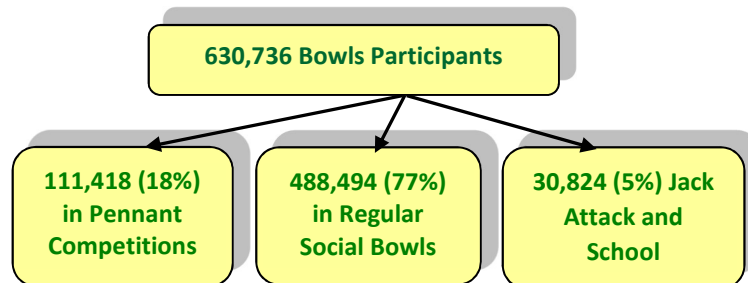


- This is the tenth National Bowls Census, undertaken to support bowls strategies, and to plan development of the game of bowls around Australia. The tenth Census is the second compiled entirely from data collected in the Bowls Australia CRM, BowlsLink platform and Sporting Schools databases with input from Bowls Australia's team, especially Regional Bowls Managers. This is a significant enhancement on previous censuses which were compiled through collaborative input of Bowls Australia staff, State and Territory Bowls Associations and surveys of bowls clubs around the nation.
- The 2020-21 Census results have been compiled from the participation data of 66% of all clubs nationally and scaled to provide estimates for 100% of clubs¹.
- Formal, or registered, playing membership of bowls clubs has been decreasing for more than 30 years, at the rate of 3.5% per annum on average. The most recent decrease was 7.2% (between 2019-20 and 2020-21). The Australian resident population was increasing at an average annual rate of 1.6% until the COVID pandemic but this has reduced to an estimated 0.2% in the 2020-21 pandemic year and is expected to have an average of just 1.1% per annum over the next decade.
- Decreases in formal membership of bowls clubs have been offset by growth in social participation in bowls; a function of Australia's time poor population. Growth in flexible formats for social bowls has also had a strong impact on the age structure of bowls participants.

1. By calculating averages for low, medium and high participation clubs and applying these averages to clubs where 2020-21 data was missing.

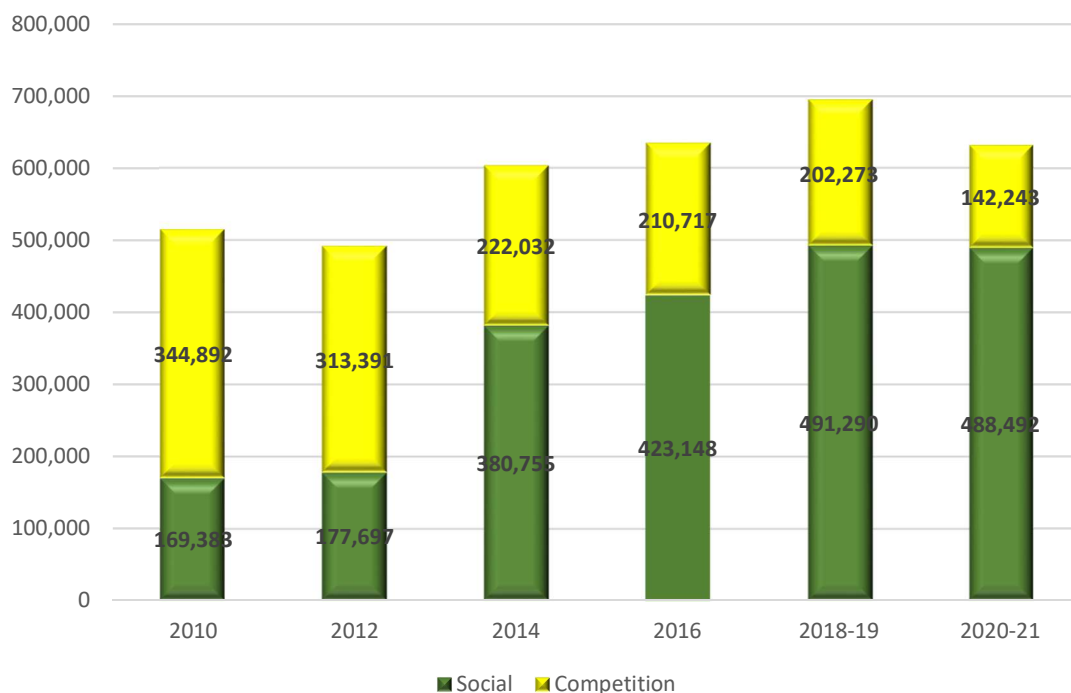
- There were 630,736 participants² in Australian bowls (Figure E1) in 2020-21:
 - 111,418 pennant competition participants
 - 488,494 participants in regular social bowls
 - 30,824 participants in Jack Attack and school competitions.

Figure E1 National Bowls Participation, 2020-21



- Bowls regular participation decreased by 4.6% on average between 2018-19 and 2020-21. Social bowls maintained its dominance, with a small decrease of 0.3% per annum during the COVID affected pandemic period (Figure E2). Social bowls is now established as, by far, the largest participation segment in bowls.
- Over the eleven-year period 2010 to 2021, regular bowls participation increased at an average annual rate of 1.87%.

Figure E2: Participation Trends: Competition and Social Bowls, 2010-2020/21³



² Participation figures include the counting of a participant each time they compete in a bowls competition or program of at least 4 games duration.

³ Jack attack and school participation are included in 'Social Bowls' in this graph until 2018-19 and in 'Competition' in 2020-21.

- 2020-21 Census results encompass a period in which the COVID pandemic has altered Australians' lifestyles and behaviour (temporarily but perhaps with long-term implications), the demographic outlook at all levels, and regional, state and national economies. Participation in bowls and the viability of bowls clubs, as well as the outlook for bowls over at least the next 5-10 years, have been impacted substantially by the pandemic. For more than the past decade Australia's population growth has been made up of around 67% from net-migration and 33% from natural increase. As a result of the COVID pandemic the contribution of these components will be approximately reversed for at least 5 years, with 65% of growth from natural increase and 35% from net-migration. This implies a reduction in the overall growth rate from about 1.6% per annum (or 400,000 people per year) to 1.0% per annum (or 251,000 people per year). Other consequences are likely to include:
- An escalation in the rate of population ageing.
 - Increased internal migration to regional areas.
- Projected new regional hotspots⁴ for growth in bowls participation during the post-COVID recovery period (while recognising that overall state and national population growth will be subdued) are:
- New South Wales
 - Southern Slopes and Plains
 - South Coast
 - Victoria
 - Central Victoria
 - Strzelecki
 - Queensland
 - Wide Bay Burnett
 - Sunshine Coast
 - Western Australia
 - South-West and Southern Zone
 - South Australia
 - Fleurieu-Coorong
 - Lower Murray
 - Tasmania
 - Hobart and South
 - Northern Territory
 - Palmerston and Rural Darwin (within Top End).

⁴ This does not imply that existing high participation regions will not continue to grow (such as North Coast NSW, Hunter, Gold Coast, Geelong)

1. INTRODUCTION

1.1 BACKGROUND

Sport and recreation have always been important to Australia and Australians as an integral part of lifestyle, a source of national pride, and a part of the country's culture. During the past few decades 'sport and recreation' has emerged as a full-scale industry within the Australian economy, making substantial employment and financial contributions in all regions and at all levels (local, State and National).

Australian Bowls is one of the largest sectors in the 'sport and recreation' industry. For example:

- (i) *Number of participants.* Bowls ranks highly among sports in Australia. Bowls club playing membership in Australia is now 150,149 across 1,802 clubs. Male membership is approximately 70% and female membership 30%. Bowls is very strong in country areas of Australia, where the number of clubs outnumber those in metropolitan areas more than two to one.
- (ii) *Events and Assets.* Australian bowls hosts a number of premier championship events. Bowling clubs are significant capital assets (including greens, drainage/irrigation systems, club facilities and other supporting infrastructure).
- (iii) *Employment and Economic Contribution.* A plethora of management, administrative, marketing, green keeping, asset management, and catering jobs are directly created by Australian bowls. Bowling clubs are significant businesses in their own right, creating millions of dollars in annual direct and indirect expenditure.

Bowls Australia introduced a National Census of Australian Bowls in 2010. Censuses were conducted annually during 2010 to 2017 and biennially from 2018. This is the report from the tenth census.

Formal membership of bowls clubs has been reducing for many years while, the censuses to date have proven, participation in social and corporate bowls competitions and events has significantly increased. There is a clear need to build on the understanding of participation in bowls, at all levels and in all regions in order to plan for the changing dynamics of the game.

In this 2020-21 Census, results are presented for participants⁵ and members in each form of bowls. Note that, throughout the tables presented in this document, any small differences (of 1 or 2) between the sum of any column or row and the stated totals are due to rounding.

1.2 DESIGN OF THE NATIONAL BOWLS CENSUS

The 2020-21 Bowls Census is the second that has been reported entirely from data collected on Bowls Australia's electronic systems: the Bowls Australia CRM, BowlsLink and Sporting Schools databases. The databases encompassed data from 66% of Australia's affiliated bowls clubs.

5. Participation figures include the counting of a participant each time they compete in a bowls competition or program of at least 4 games duration.

- **Bowls Regions around Australia.**

One of the important applications of the Census is its use as a planning tool at regional level. The development of regional boundaries for each state/territory has been implemented and is reviewed with consideration given to statistical area boundaries, in order to enable the calculation of player to population rates and preparation of regional profiles. There are 64 Bowls Regions reported in 2020-21:

- 24 Metropolitan Regions (including the Australian Capital Territory as a single metropolitan region)
- 40 Country Regions (including the Northern Territory as a single country region).

- **Bowls Databases**

The Bowls Australia CRM, BowlsLink and Sporting Schools databases encompassed details of:

- Club details (address and contacts)
- Playing members.
- Participation in each form of bowls (including details of participation of 4 or more bowls games per annum⁶).
- Promotional bowls experiences
- Age and gender details for all participation and promotional experiences.

Census results have been compiled from the participation data of 66% of all clubs nationally, as shown in Table 1.1 and scaled to provide estimates for 100% of clubs⁷.

Table 1.1 Clubs with Data Entered on BowlsLink, 2020-21

	Number of Clubs	Data Entered	%
Australian Capital Territory	8	8	100.0%
New South Wales	526	331	62.9%
Northern Territory	7	7	100.0%
Queensland	295	148	50.2%
South Australia	208	208	100.0%
Tasmania	68	41	60.3%
Victoria	486	238	49.0%
Western Australia	204	202	99.0%
Australia	1,802	1,183	65.6%

- **Retirement Lifestyle Villages and Unaffiliated Bowls Clubs**

There are an increasing number of Retirement Lifestyle Villages which incorporate bowling greens and clubs, as well as a number of Bowling Clubs around the country which are not affiliated with Bowls Australia or a State/Territory Association. The number of participants at these facilities has not been included in the Census results in 2020-21 (nor in previous Censuses). It is planned to develop a methodology by which these participants can be added in future Censuses.

⁶ Note that 4 games per annum has been used as the minimum level to be counted as a bowls participant in the Census figures. Participation at less than 4 games has been recorded as 'promotional involvement'

⁷ By calculating averages for low, medium and high participation clubs and applying these averages to clubs where 2020-21 data was missing.

2. NATIONAL SUMMARY

2.1 BOWLS CLUB MEMBERSHIP

Bowls Australia (BA) and the State/Territory Associations recognise that membership and participation are fundamental to the success of the sport in an increasingly competitive environment, in which Australia's population is increasingly conscious of the importance of health and leisure but, at the same time, is increasingly 'time poor' and receptive to sport and recreational pursuits that enable participation within the constraints of a busy lifestyle.



Figure 2.1 shows that formal, or registered, playing membership has decreased progressively since 1980. The average rate of decrease has been 2.5% per annum throughout the period. However, in the past five years the average annual decrease has been somewhat higher at 3.2%. Between 2019-20 and 2020-21, during the height of the COVID pandemic, the decrease escalated to 7.2%. Playing members of bowls clubs in 2020-21 were only 35% of those registered in 1980. Over this same period (1980-2021) the Australian total resident population has increased by 75%, from 14.69 million to 25.70 million, at an average annual rate of 1.4%.

Table 2.1 summarises the playing member trends contributing to a 3.46% average annual decrease since Bowls Censuses began.

Figure 2.1 Trends in Playing Membership 1980-2020/21

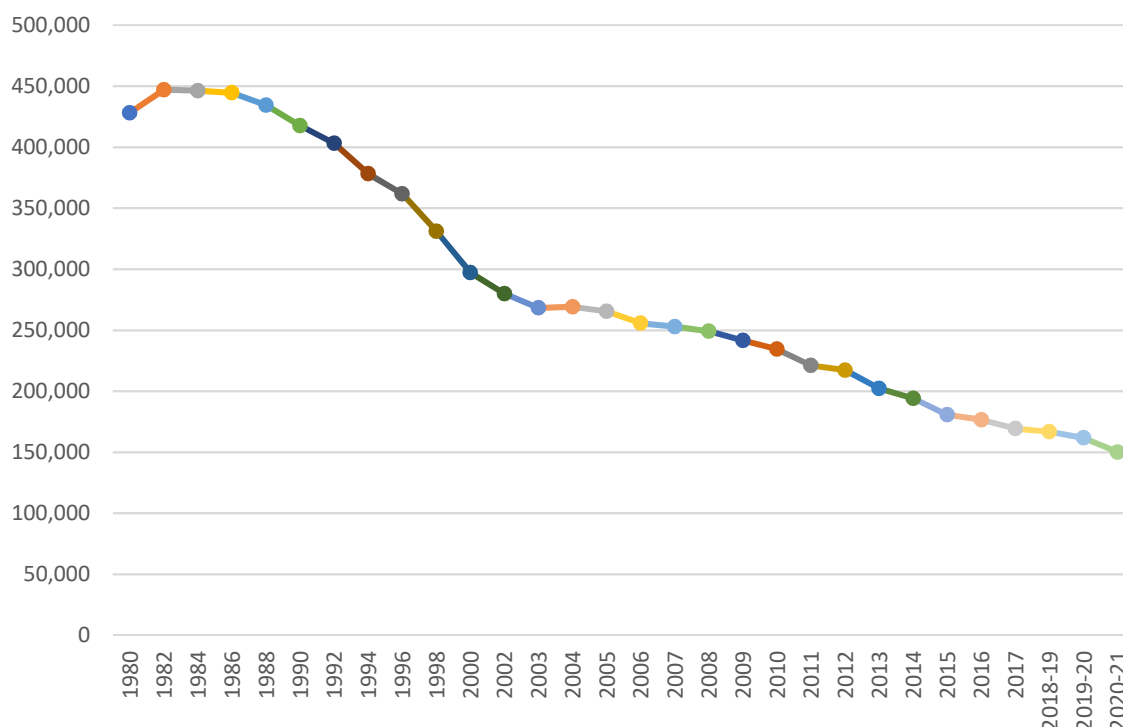


Table 2.1 Playing Member Trends, 2010-11 to 2020-21

	2010-11	2012-13	2014-15	2018-19	2020-21
Australian Capital Territory	2,463	2,342	1,838	1,623	1,599
New South Wales	80,587	72,586	64,712	52,777	47,347
Northern Territory	447	309	255	348	384
Queensland	43,571	38,491	34,389	28,818	27,307
South Australia	17,150	16,578	15,745	20,149	18,628
Tasmania	5,980	5,635	5,157	4,479	4,340
Victoria	51,969	48,267	42,232	43,228	36,669
Western Australia	18,965	18,072	16,345	15,440	13,875
Total	221,132	202,280	180,673	166,862	150,149

SOURCE: Bowls Australia records, Censuses 2010 to 2020-21

2.2 PARTICIPATION IN BOWLS

Table 2.2 presents details of all bowls participation (greater than 4 weeks/games duration) by State/Territory and bowls segment. There were 630,736 participants in bowls in 2020-21 (in competitions and programs of at least 4 weeks/games duration), comprising:

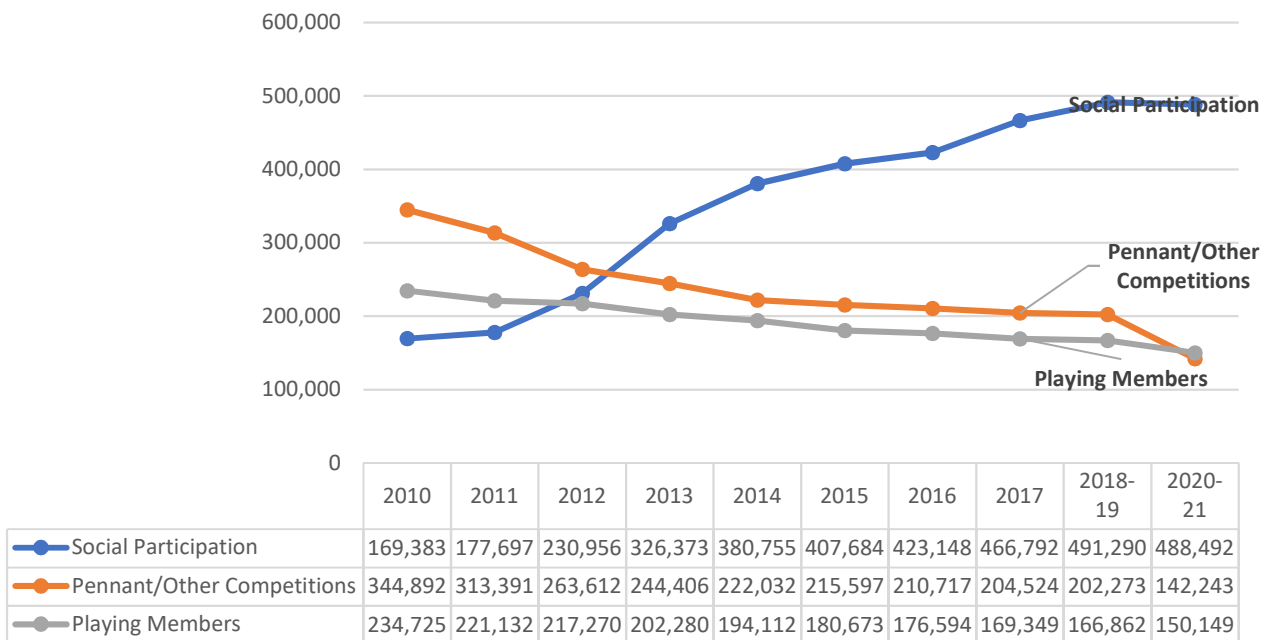
- 111,418 pennant competition participants
- 488,494 social programs participants (including barefoot and other social bowls activities)
- 30,824 Jack Attack and school participants.

Table 2.2: Bowls Participants (4+ weeks/games) Australia, 2020-21

Participants 4+ games	Pennant Competition	Social Bowls	Jack Attack and School Competition	Total
Australian Capital Territory	771	4,061	294	5,126
New South Wales	31,854	169,033	9,955	210,842
Northern Territory	279	14,656	100	15,035
Queensland	16,591	96,102	5,661	118,354
South Australia	15,276	23,047	3,579	41,903
Tasmania	3,885	17,409	1,097	22,391
Victoria	31,149	123,314	7,859	162,322
Western Australia	11,613	40,872	2,279	54,764
Total	111,418	488,494	30,824	630,736

Table 2.3 and Figure 2.2 summarise trends in both participants and playing members over the nine years since inception of the national bowls census. The table also shows that:

- The average annual increase in regular (4+ games) bowls participation has been 1.87% over the period 2010 to 2020-21.
- The average annual increase in regular social participation has been 10.11% over the period 2010 to 2020-21.
- The average annual decrease in regular pennant and other competition participation has been 7.74% over the period 2010 to 2020-21.
- The average annual decrease in playing membership has been 3.98% over the period 2010 to 2020-21.

Figure 2.2 National Participation and Playing Member Trends**Table 2.3 Trends in Participation (4+ games) and Playing Membership: 2010 to 2020-21 by State and Territory**

State/Territory	2010	2011	2012	2014	2016	2018-19	2020-21	% p.a.
Australian Capital Territory								
Social Participation	10,770	4,244	2,100	5,209	9,716	1,437	4,061	-8.49%
Pennant/Other Competitions	3,492	5,331	2,230	2,092	1,637	1,460	1,065	-10.23%
Total Participants	14,262	9,575	4,330	7,301	11,353	2,897	5,126	-8.88%
Playing Members	2,502	2,463	2,135	1,940	1,833	1,623	1,599	-3.99%
New South Wales								
Social Participation	40,325	43,371	73,673	140,118	143,167	101,120	169,033	13.92%
Pennant/Other Competitions	115,285	106,889	87,229	59,903	55,587	66,540	41,809	-8.81%
Total Participants	155,610	150,260	160,902	200,021	198,753	167,661	210,842	2.80%
Playing Members	85,140	80,587	78,749	68,793	59,233	52,777	47,347	-5.19%
Northern Territory								
Social Participation	1,825	2,483	2,620	2,765	4,783	26,072	14,656	20.85%
Pennant/Other Competitions	424	443	929	432	385	493	379	-1.01%
Total Participants	2,249	2,926	3,549	3,197	5,168	26,565	15,035	18.85%
Playing Members	416	447	594	329	262	348	384	-0.73%
Queensland								
Social Participation	34,375	40,704	68,388	115,601	103,734	136,767	96,102	9.80%
Pennant/Other Competitions	65,122	55,707	38,250	36,015	30,517	32,433	22,252	-9.30%
Total Participants	99,497	96,411	106,638	151,616	134,252	169,201	118,354	1.59%
Playing Members	45,638	43,571	39,106	37,319	33,480	28,818	27,307	-4.56%

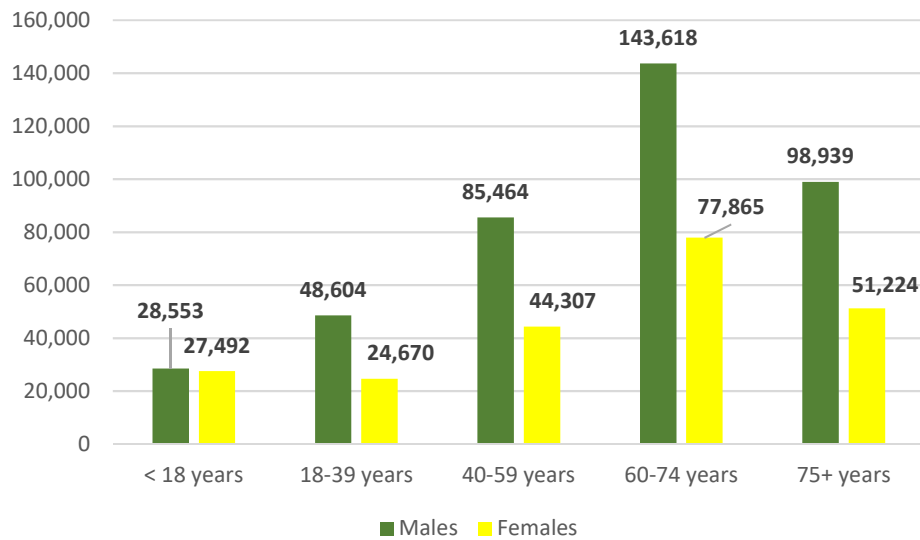
Table 2.3 (continued) Trends in Participation (4+ games) and Playing Membership: 2010 to 2020-21 by State and Territory

	2010	2011	2012	2014	2016	2018-19	2020-21	% p.a.
South Australia								
Social Participation	19,094	7,261	12,687	12,072	20,190	45,990	23,047	11.18%
Pennant/Other Competitions	27,759	28,296	25,249	20,928	23,286	12,654	18,855	-4.58%
Total Participants	46,853	35,557	37,936	33,000	43,476	58,644	41,903	4.72%
Playing Members	17,472	17,150	17,532	16,249	15,113	20,149	18,628	0.58%
Tasmania								
Social Participation	5,081	6,724	4,763	7,742	7,877	11,975	17,409	11.85%
Pennant/Other Competitions	7,333	7,306	9,105	6,702	8,611	4,076	4,982	-3.45%
Total Participants	12,414	14,030	13,868	14,444	16,488	16,051	22,391	5.51%
Playing Members	6,018	5,980	6,773	5,419	4,810	4,479	4,340	-2.93%
Victoria								
Social Participation	43,169	54,772	47,741	85,284	123,469	143,802	123,314	10.01%
Pennant/Other Competitions	83,660	75,188	73,219	68,866	65,522	54,351	39,008	-6.70%
Total Participants	126,829	129,960	120,960	154,150	188,991	198,152	162,322	2.27%
Playing Members	58,169	51,969	51,098	46,775	46,038	43,228	36,669	-4.11%
Western Australia								
Social Participation	14,744	18,138	18,984	11,965	10,212	24,127	40,872	9.71%
Pennant/Other Competitions	41,817	34,231	27,401	27,094	25,172	30,266	13,892	-9.53%
Total Participants	56,561	52,369	46,385	39,059	35,384	54,393	54,764	-0.29%
Playing Members	19,370	18,965	21,283	17,288	15,825	15,440	13,875	-2.99%
Australia								
Social Participation	169,383	177,697	230,956	380,755	423,148	491,290	488,492	10.11%
Pennant/Other Competitions	344,892	313,391	263,612	222,032	210,717	202,273	142,243	-7.74%
Total Participants	514,275	491,088	494,568	602,787	633,865	693,563	630,736	1.87%
Playing Members	234,725	221,132	217,270	194,112	176,594	166,862	150,149	-3.98%

* Note: Competitions include Jack Attack, and School (of 4+ weeks/sessions) in 2020-21

SOURCE: National Bowls Censuses 2010 to 2020-21

Male bowls participants are in the majority, making up 64% of all regular participants. This gender variation is quite consistent across all age groups except those less than 18 years, where males are just in the majority, contributing 51% of the total; a reflection of the inclusion of mixed school groups and junior participants in Jack Attack programs. Figure 2.3 shows male and female participant numbers by age group.

Figure 2.3 Total Bowls Participation by Gender, 2020-21

Bowls participation to population rates show the extent to which people in each age group and in each region are involved in bowls. The participant to population rates for each State and Territory and Australia are presented in Table 2.4.

The overall participation rate in Australia was 2.45% (3.18% for males and 1.74% for females). Participation was highest in the 75+ years age group (8.19%) and lowest in the 18-39 years age group (0.92%).

Table 2.4 Participant to Population Rates, 2020-21**Male Participation Rates**

	<18 years	18-39 years	40-59 years	60-74 years	75+ years	Total
Australian Capital Territory	0.43%	0.61%	1.19%	3.52%	5.79%	1.33%
New South Wales	1.37%	1.40%	2.96%	7.51%	10.86%	3.30%
Northern Territory	0.18%	2.76%	7.93%	29.47%	24.93%	6.90%
Queensland	0.67%	1.10%	2.67%	7.55%	11.13%	2.96%
South Australia	1.13%	0.79%	1.74%	7.20%	12.15%	3.01%
Tasmania	1.65%	2.44%	4.73%	10.25%	17.08%	5.44%
Victoria	0.91%	1.18%	2.67%	8.16%	14.14%	3.25%
Western Australia	0.57%	0.94%	2.19%	7.09%	12.45%	2.71%
Total	0.98%	1.21%	2.71%	7.78%	12.14%	3.18%

Female Participation Rates

	<18 years	18-39 years	40-59 years	60-74 years	75+ years	Total
Australian Capital Territory	0.44%	0.31%	0.61%	1.83%	2.44%	0.74%
New South Wales	1.25%	0.82%	1.60%	4.05%	4.68%	1.91%
Northern Territory	0.17%	2.59%	5.75%	23.36%	14.12%	5.27%
Queensland	0.71%	0.58%	1.30%	3.90%	5.11%	1.63%
South Australia	1.06%	0.50%	0.97%	3.74%	5.25%	1.74%
Tasmania	1.87%	1.18%	2.22%	5.02%	7.07%	2.87%
Victoria	1.07%	0.43%	1.16%	3.76%	5.34%	1.61%
Western Australia	0.62%	0.42%	1.06%	3.61%	4.82%	1.41%
Total	1.00%	0.62%	1.36%	3.99%	5.05%	1.74%

Total (Male and Female) Participation Rates

	<18 years	18-39 years	40-59 years	60-74 years	75+ years	Total
Australian Capital Territory	0.43%	0.46%	0.90%	2.64%	3.92%	1.04%
New South Wales	1.30%	1.10%	2.25%	5.68%	7.38%	2.58%
Northern Territory	0.18%	2.68%	6.87%	26.57%	19.53%	6.11%
Queensland	0.69%	0.84%	1.97%	5.68%	7.85%	2.29%
South Australia	1.10%	0.65%	1.35%	5.41%	8.26%	2.37%
Tasmania	1.76%	1.82%	3.44%	7.58%	11.60%	4.14%
Victoria	0.99%	0.81%	1.90%	5.88%	9.22%	2.42%
Western Australia	0.59%	0.68%	1.63%	5.31%	8.23%	2.06%
Total	0.98%	0.92%	2.02%	5.82%	8.19%	2.45%

2.3 REGIONAL PARTICIPATION

The Australian Bowls regions are all consistent with groups of Statistical Divisions used by the Australian Bureau of Statistics for a wide range of statistical collections. These can be valuable in comparing and planning bowls initiatives using regional data (population, economic and other relevant data). Regions are an appropriate unit for allocating resources, targeting growth areas and developing local responses to meet the needs of communities around the nation. However, the distribution of regions needs some adjustment, so that the number of regions per State is consistent with population, geography and bowls participation.

Table 2.5 summarises the top ten participation regions and the top ten by competition and social bowls revealing that:

- New South Wales regions of North Coast, Hunter, Riverina Murray, Northern Sydney, South Coast and Greater Western Sydney are heartlands for pennant and other competition bowls.
- Coastal tourism and retirement regions tend to be strong in social bowls (eg Gold Coast and Sunshine Coast, Qld and South West and Southern WA), and some are highly ranked in both competition and social bowls (eg North Coast, Hunter and South Coast in NSW and Peninsula Casey in Victoria).
- Recent renovations/capital investment in Darwin and Alice Springs (and relative freedom during the COVID pandemic) have stimulated social bowls participation in the Territory.
- Western Australia has maintained a high level of participation in competition bowls.
- Three country Victorian regions are among the top bowls participation regions (Bendigo Campaspe, Central Goulburn Murray, and Peninsula Casey).

Table 2.5 Largest Competition, Social and Overall Participant Regions

Rank	Competition Bowls	Social Bowls	Total Participants
1	North Coast, NSW	North Coast, NSW	North Coast, NSW
2	Hunter, NSW	Hunter, NSW	Hunter, NSW
3	Riverina Murray, NSW	Riverina Murray, NSW	Riverina Murray, NSW
4	Northern Sydney, NSW	Northern Sydney, NSW	Northern Sydney, NSW
5	Bendigo Campaspe, Vic	Bendigo Campaspe, Vic	Bendigo Campaspe, Vic
6	Central Goulburn, Vic	Gold Coast, Qld	Central Goulburn, Vic
7	South Coast, NSW	Central Goulburn, Vic	Gold Coast, Qld
8	Greater Western Sydney, NSW	Northern Territory, NT	Greater Western Sydney, NSW
9	Peninsula Casey, Vic	Greater Western Sydney, NSW	South Coast, NSW
10	Northern Perth, WA	South Coast, NSW	Peninsula Casey, Vic

Table 2.6 shows the Australian Bowls regions in rank order of participants.

Table 2.6 Regions Ranked by Bowls Participation, 2020-21

Region	State	Competition Bowls	Social Bowls	Total Participants
North Coast	NSW	7,416	27,387	34,803
Hunter	NSW	6,073	26,334	32,407
Riverina Murray	NSW	4,707	23,831	28,538
Northern Sydney	NSW	4,635	16,314	20,950
Bendigo Campaspe	Vic	4,134	15,401	19,535
Central Goulburn	Vic	3,820	15,058	18,878
Gold Coast	Qld	3,158	15,102	18,259
Greater Western Sydney	NSW	3,599	14,018	17,616
South Coast	NSW	3,780	12,635	16,416
Peninsula Casey	Vic	3,592	12,109	15,702
Northern Territory	NT	379	14,656	15,035
Southern Sydney	NSW	2,849	11,416	14,265
Central Victoria	Vic	3,020	11,106	14,126
Brisbane	Qld	2,754	10,551	13,305
South-West and Southern Zone	WA	2,670	9,734	12,404
West Coast	Vic	2,705	9,204	11,910
South Coastal Perth	WA	2,764	8,574	11,338
Sunshine Coast	Qld	2,298	8,895	11,192
Central West	NSW	1,941	8,130	10,071
Strzelecki	Vic	2,127	7,684	9,811
Northern Perth	WA	3,589	5,830	9,419
Wimmera	Vic	1,823	7,584	9,407
Inner Sydney	NSW	1,913	7,265	9,178
North West	NSW	2,072	6,970	9,042
Sandbelt	Vic	2,495	6,436	8,931
Eastern Ranges	Vic	2,752	5,931	8,683
Yarra	Vic	2,910	5,617	8,527
Far West	NSW	1,153	7,304	8,456
Murray Mallee	Vic	1,429	6,934	8,363
Hobart and South	Tas	1,791	6,486	8,278
Gateway	Qld	1,915	6,047	7,962
Ovens and Murray	Vic	1,958	5,730	7,689
Launceston and North	Tas	1,698	5,785	7,484
Gippsland	Vic	1,482	5,877	7,359
North Qld	Qld	1,291	5,455	6,746
Geelong	Vic	2,150	4,442	6,592
FNQ	Qld	1,346	5,147	6,494
Adelaide Torrens	SA	2,666	3,712	6,378
Burnett	Qld	1,066	5,229	6,295
Brisbane North	Qld	1,062	5,196	6,258
Barossa	SA	2,351	3,748	6,099
Northern WA	WA	1,166	4,630	5,796
Mackay	Qld	1,287	4,489	5,776
South West Adelaide	SA	2,800	2,908	5,708
North-West Tas	Tas	1,296	4,259	5,555
Bundaberg Pt Curtis	Qld	802	4,692	5,494
Fraser Coast	Qld	1,078	4,260	5,338
Central Coast	NSW	996	4,252	5,248
ACT	ACT	1,065	4,061	5,126
Central-Pilbara-Kimberley	WA	1,021	3,979	4,999

Table 2.6 (continued) Regions Ranked by Bowls Participation, 2020-21

Region	State	Competition Bowls	Social Bowls	Total Participants
Eastern Perth	WA	1,184	3,566	4,750
Central Qld	Qld	836	3,866	4,702
Fleurieu Coorong	SA	1,916	2,693	4,610
Northern Gateway	Vic	1,700	2,874	4,574
Eastern Adelaide	SA	1,193	2,890	4,084
Caboolture	Qld	652	3,380	4,032
Murraylands	SA	2,041	1,981	4,022
Southern Slopes and Plains	NSW	676	3,178	3,853
Yorke Peninsula	SA	1,649	2,175	3,825
Condamine	Qld	584	3,186	3,771
Southern Perth	WA	879	2,468	3,347
Downs	Qld	668	2,574	3,242
Cunningham	Qld	540	2,610	3,150
South East	SA	1,858	950	2,808
Eastern Region	WA	620	2,090	2,711
Spencer Gulf	SA	1,261	1,225	2,486
Metro West	Vic	911	1,325	2,236
Leichardt	Qld	322	1,616	1,938
Southern Downs	Qld	149	1,667	1,817
Maranoa	Qld	319	1,402	1,721
Northern Adelaide	SA	792	551	1,343
Eastern Tas	Tas	197	878	1,074
North-West Qld	Qld	125	738	863
Lower Murray	SA	328	213	541

2.4 BOWLS EXPERIENCES (Less than 4 weeks)

To be counted as 'a participant' in the National Bowls Census a person must play at least four times during the year in a competition or in a social or other program. This definition has been agreed to provide a meaningful minimum level of involvement for measuring regular participation.

There are also many people involved in events, once-off activities, community programs and other bowls activities of less than four weeks/games duration, which are broadly described as bowls experiences. These experiences can be an integral part of the viability of a bowls club and to the development of the game of bowls. The nature and level of experiences varies from state to state. Promotional bowls experiences can include some social, corporate and school activities.

Table 2.7 shows that there were 1,636,095 bowls experiences (i.e. social activities of less than four weeks' duration; usually once) in 2020-21. There has been great interest in, and promotion of, casual events around barefoot bowling and this segment contributed 80% of all bowls experiences in 2020-21.

Table 2.7 Promotional Bowls Experiences (Less than 4 weeks/games) 2020-21

Promotional Experiences					
	Jack Attack	School	Barefoot	Other Social	Total
Australian Capital Territory	48	0	22,434	1,630	24,112
New South Wales	2,295	11,496	454,347	89,564	557,702
Northern Territory	180	2,120	8,680	1,200	12,180
Queensland	612	5,104	359,168	27,731	392,615
South Australia	10	1,120	29,329	11,961	56,062
Tasmania	79	0	17,728	4,550	22,357
Victoria	2,665	17,344	295,987	108,994	424,991
Western Australia	542	4,072	113,075	28,388	146,076
Australia	6,431	41,256	1,300,748	274,018	1,636,095

2.5 COVID PANDEMIC IMPACTS

Australia's population growth has been made up of around 67% from net-migration and 33% from natural increase during the 21st century to date. As a result of the COVID pandemic international migration has been temporarily eliminated and will take several years to recover dependent on both health risks and Government policy directives. The contribution of these migration and natural increase components will be approximately reversed for at least 5 years, with 65% of growth from natural increase and 35% from net-migration. This implies a reduction in the overall growth rate from about 1.6% per annum (or 400,000 people per year) to 0.98% per annum (or 251,000 people per year). Other consequences are likely to include:

- An escalation in the rate of population ageing.
- Increased internal migration to regional areas.

The estimated implications at a State and Territory level are summarised in Table 2.8.

Table 2.8 Estimated COVID Impacts on States and Territories

Region	2020 Population	Pre-Covid Projected Growth Rate to 2030-31 (% per annum)	Post-Covid Projected Growth Rate to 2030-31 (% per annum)	Projected Change in Net-Migration	Change Domestic Tourism during COVID 2020-21 (%)
New South Wales ⁸	8,167,532	1.16%	0.60%	Lower	-0.5%
Queensland	5,176,186	1.62%	1.01%	Lower	+1.6%
South Australia	1,770,375	1.01%	0.55%	Lower	-3.0%
Victoria	6,696,670	1.89%	1.36%	Lower	-26.8%
Western Australia	2,663,561	1.54%	1.01%	Lower	+3.8%
Tasmania	540,780	1.16%	0.65%	Lower	+13.1%
Australian Capital Territory	431,380	1.20%	0.72%	Lower	+13.9%
Northern Territory	246,143	0.00%	0.01%	Higher	-8.5%

⁸ Includes Queanbeyan LGA (part of ACT Bowls region) and offshore islands

3. NEW SOUTH WALES

3.1 REGIONAL STRUCTURE

New South Wales is Australia's most populous state with 8,167,532 residents or 31.8% of the Australian population⁹. Bowls New South Wales has four regions in metropolitan Sydney, and nine country regions.

The New South Wales Bowls regions for planning and development are:

- ❖ Metropolitan Sydney
 - Northern Sydney
 - Greater Western Sydney
 - Inner Sydney
 - Southern Sydney
- ❖ Country New South Wales
 - Central West
 - Far West
 - North West
 - North Coast
 - South Coast
 - Hunter
 - Central Coast
 - Southern Slopes and Plains
 - Riverina Murray

The locations of these regions are shown in Figure 3.1.

Prior to the COVID pandemic the New South Wales population was growing at an average annual rate of 0.99% per annum of which 53.3% came from natural increase (births over deaths) and 46.7% from net-migration. However, the COVID pandemic has introduced a new outlook for New South Wales which will change the population size and structure over at least the medium term, with implications for the Bowls Regions, operation of clubs and game development. In particular, this includes:

- Much lower levels of net-international migration.
- A shift in net-internal migration (interstate and intrastate) away from metropolitan Sydney and towards regional New South Wales.
- A reduction in the expected average annual growth of New South Wales from 1.2% per annum pre-pandemic to an estimated 0.6% per annum post-pandemic. This would result in a State population of 8,723,000 by 2030-31, which is about 575,000 less than pre-COVID projections.
- More rapid ageing of regional populations than previously projected.
- Increased domestic tourism visitation to many Bowls Regions.

Table 3.1 summarises the estimated COVID impacts.

⁹ Australian Bureau of Statistics, Regional Population 2019-20 (Released March 2021)

Table 3.1 Estimated COVID Impacts on New South Wales Population

Region	2020 Population	Pre-Covid Projected Growth Rate to 2030-31 (% per annum)	Post-Covid Projected Growth Rate to 2030-31 (% per annum)	Projected Change in Net-Migration	Change Domestic Tourism during COVID 2020-21 (%)
Sydney Metropolitan	5,021,349	1.44%	0.64%	Lower	-32.2%
Country New South Wales					
Central Coast	213,714			Lower	-17.2%
Central West	116,440			Lower	+32.6%
Far West	186,312			No change	+21.8%
Hunter	622,682			Higher	+12.4%
North Coast	411,880			Higher	+8.3%
North-West	667,678			No change	+15.6%
Riverina Murray	345,857			Higher	-4.3%
South Coast	158,728			Higher	+22.1%
Southern Slopes and Plains	283,985			Higher	n.a.
Total Country NSW	3,007,276	0.61%	0.50%	Higher	+13.3%
Total NSW¹⁰	8,167,532	1.16%	0.60%	Lower	-0.5%

3.2 PARTICIPANTS

Table 3.2 summarises bowls participation by major segment. In total, there were 210,842 participants in bowls competitions and programs (of at least 4 games duration) in New South Wales during 2020-21. Specifically,

The greatest participation segment in New South Wales was barefoot bowls, with 22.2% of participants.

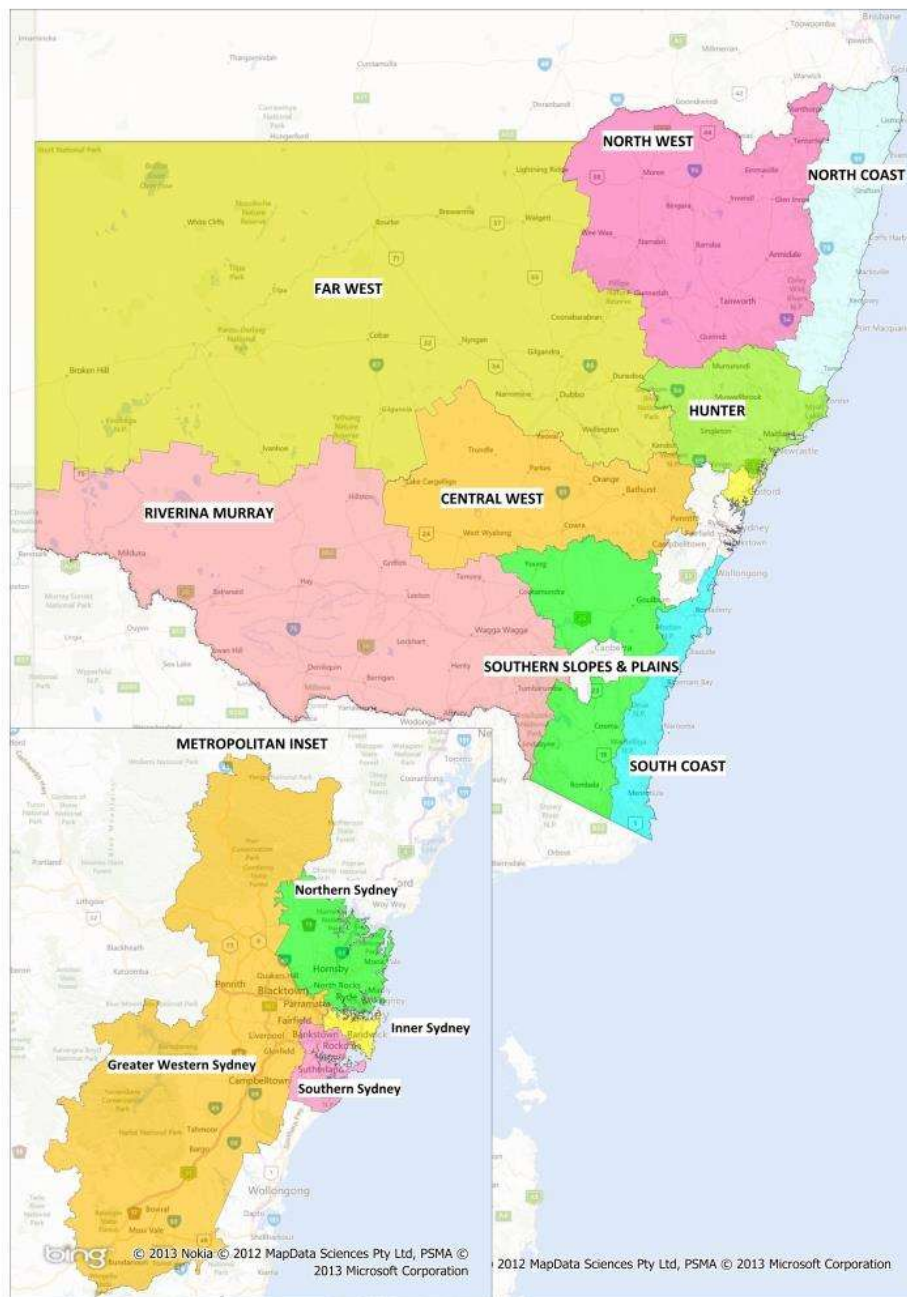
Male participation makes up 62.9% of all bowls participation in New South Wales.

Participation in country New South Wales (148,833) is 70.6% of the total, although country NSW makes up around 37% of the population.

Many bowls participants are involved in more than one structured bowls competition, social or other program. This includes:

- ❑ Pennant and other competition participants who regularly play in more than one competition during the same season or year.
- ❑ Participants involved in both competition and social bowls.

¹⁰ Includes Queanbeyan LGA (part of ACT Bowls region) and offshore islands

Figure 3.1 New South Wales Bowls Regions

Bowls participation to population rates show the extent to which people in each age group and in each region are involved in bowls. For New South Wales the participant to population rate was 2.58%:

- 3.30% for males
- 1.91% for females.

Table 3.2 Bowls Participation (4+ games) in New South Wales, 2020-21

	Competition Participants			Social Participants		Total Social	TOTAL Participants
	Pennant	Jack Attack/School Competitions	Total Competition	Barefoot	Other Social		
Greater Western Sydney	2,775	824	3,599	2,841	11,176	14,018	17,616
Inner Sydney	1,499	413	1,913	1,424	5,841	7,265	9,178
Northern Sydney	3,508	1,128	4,635	3,317	12,998	16,314	20,950
Southern Sydney	2,200	649	2,849	2,290	9,127	11,416	14,265
Total Sydney Metropolitan	9,981	3,014	12,995	9,872	39,142	49,013	62,009
Central Coast	713	283	996	1,696	2,556	4,252	5,248
Central West	1,526	415	1,941	2,767	5,363	8,130	10,071
Far West	867	285	1,153	3,896	3,408	7,304	8,456
Hunter	4,696	1,377	6,073	7,160	19,174	26,334	32,407
North Coast	5,845	1,571	7,416	5,582	21,805	27,387	34,803
North-West	1,577	495	2,072	1,487	5,482	6,970	9,042
Riverina Murray	3,312	1,395	4,707	9,780	14,051	23,831	28,538
South Coast	2,788	992	3,780	3,714	8,921	12,635	16,416
Southern Slopes and Plains	549	127	676	886	2,292	3,178	3,853
Total Country NSW	21,873	6,940	28,814	36,968	83,051	120,019	148,833
Total NSW	31,854	9,955	41,809	46,840	122,193	169,033	210,842

4. QUEENSLAND

4.1 REGIONAL STRUCTURE

Queensland is Australia's third largest state in terms of resident population with 5,176,186 persons or 20.1% of the Australian population¹¹. Queensland and Tasmania are Australia's most decentralised states. They are the only states/territories where the majority of the population does not live in the capital city.

Bowls Queensland has six 'hub' regions, with twenty regions: Two regions in metropolitan Brisbane (plus the Gold Coast and Sunshine Coast regions), four country hub regions.

The Queensland hubs and regions for Census reporting in 2020-21 are:

- ❖ Metropolitan Brisbane
 - Brisbane North
 - Brisbane
 - Brisbane North
 - Caboolture
 - Brisbane South and West
 - Cunningham
 - Gateway
- ❖ Country Queensland
 - Gold Coast
 - Sunshine Coast
 - Wide Bay Burnett
 - Bundaberg Pt Curtis
 - Burnett
 - Fraser Coast
 - Downs Condamine Maranoa
 - Downs
 - Southern Downs
 - Condamine
 - Maranoa
 - Central Queensland Whitsundays
 - Central Queensland
 - Leichardt
 - Mackay
 - North and Far North Queensland
 - North Queensland
 - Far North Queensland (FNQ)
 - North-West Queensland.

The locations of these regions are shown in Figure 4.1.

¹¹ ABS Regional Populations 2019-20

Prior to the COVID pandemic the Queensland population was growing at an average annual rate of 1.62% per annum of which 34.4% came from natural increase (births over deaths) and 65.6% from net-migration. The COVID pandemic has introduced a new outlook for Queensland which will change the population size and structure over at least the medium term, with implications for the Bowls Regions, operation of clubs and game development. In particular, this includes:

- Much lower levels of net-international migration.
- Reduced overall net-internal migration (interstate and intrastate) with projected net-losses in metropolitan Brisbane and lower net-gains in regional Queensland.
- A reduction in the expected average annual growth of Queensland from 1.34% per annum pre-pandemic to an estimated 0.6% per annum post-pandemic. This would result in a State population of 5,528,000 by 2030-31, which is about 464,000 less than pre-COVID projections.
- More rapid ageing of regional populations than previously projected.
- Increased domestic tourism visitation to many Bowls Regions.
- International tourism has clearly also been impacted, which has a limited effect on bowls participation in most States, but Queensland has been the home to many international Bowls events in the past decade, so this State will be impacted by the likely timid return of international tourism.

Table 4.1 summarises the estimated COVID impacts.

Table 4.1 Estimated COVID Impacts on Queensland Population

Region	2020 Population	Pre-Covid Growth Rate (% per annum)	Post-Covid Projected Growth Rate to 2030-31 (% per annum)	Projected Change in Net-Migration	Change in Domestic O'night Tourism 2020-21 (%)
Brisbane Metropolitan	2,560,720	1.87%	1.09%	Lower	-10.9%
Wide Bay Burnett	302,105	0.89%		Higher	+16.1%
Downs Condamine Maranoa	288,697	0.54%		No change	+10.8%
Central Queensland Whitsundays	420,054	0.71%		Lower	+11.3%
North and Far North Queensland	560,565	0.79%		No change	+10.5%
Gold Coast	650,996	2.35%		Higher	+2.8%
Sunshine Coast	393,049	2.29%		Higher	+17.0%
Total Country Qld	2,615,466	1.37%	0.91%	Higher	+7.5%
Total Queensland	5,176,186	1.62%	1.01%	Lower	+1.6%

4.2 PARTICIPANTS

Table 4.2 summarises bowls participation by major segment. In total, there were 118,354 participants in bowls competitions and programs (of at least 4 games duration) in Queensland during 2020-21. Specifically,

The greatest participation segment in Queensland was social bowls programs, with 81.2% of participants.

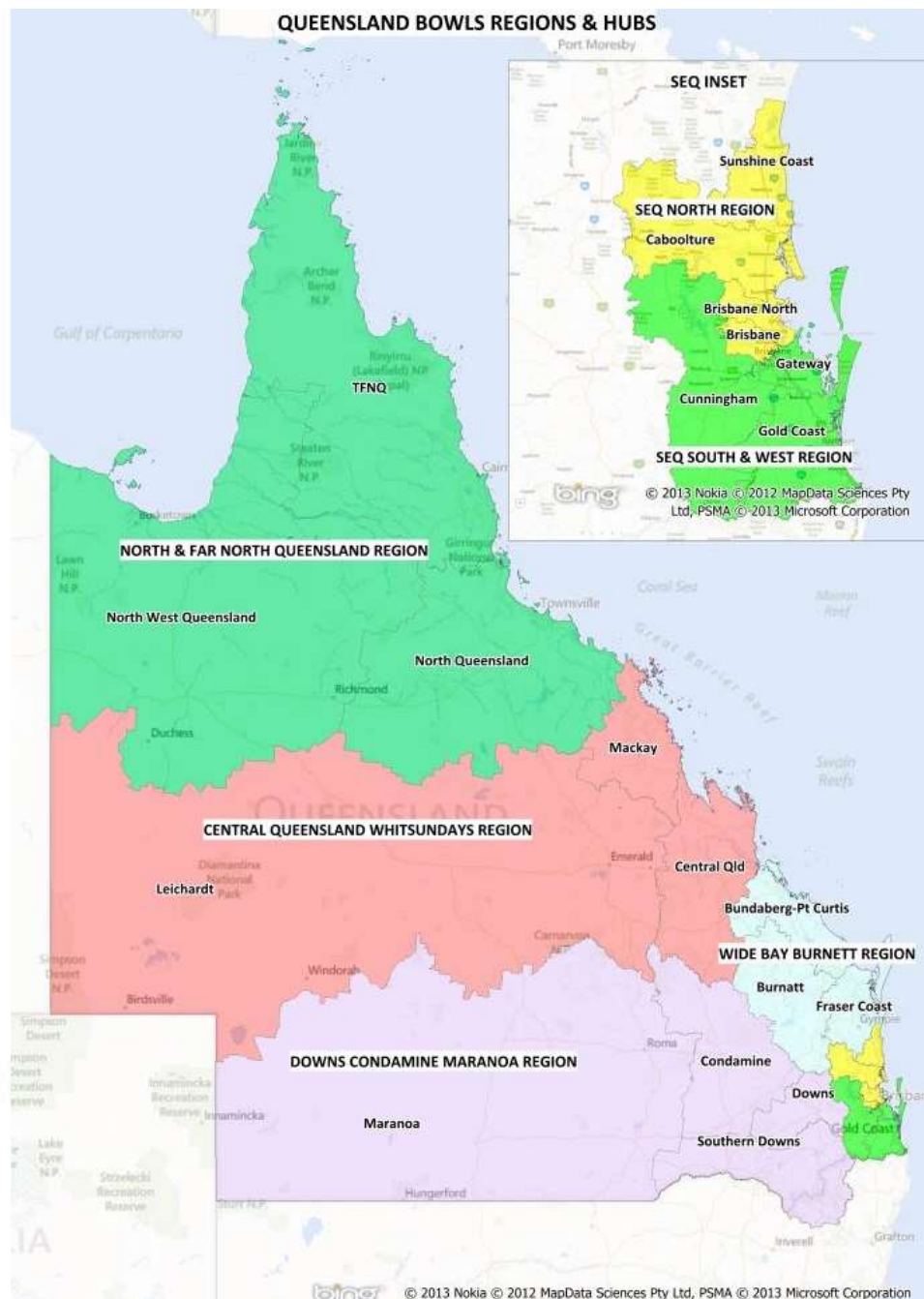
Male participation makes up 64.0% of all bowls participation in Queensland.

Participation in country Queensland (70%) is more than double metropolitan Brisbane participation (30%).

Many bowls participants are involved in more than one structured bowls competition, social or other program. This includes:

- ❑ Pennant and other competition participants who regularly play in more than one competition during the same season or year.
- ❑ Participants involved in both competition and social or corporate bowls.

Figure 4.1 Queensland Bowls Regions



Bowls participant to population rates show the extent to which people in each age group and in each region are involved in bowls. The overall participant to population rate in Queensland was 2.29%, the male rate was 2.96% and female was 1.63%.

Table 4.2 Bowls Participation (4+ games) in Queensland, 2020-21

	Competition Participants			Social Participants			
	Pennant	Jack Attack/School Competitions	Total Competition	Barefoot	Other Social	Total Social	TOTAL Participants
SEQ North							
Brisbane	2,100	654	2,754	1,701	8,850	10,551	13,305
Brisbane North	899	163	1,062	179	5,017	5,196	6,258
Caboolture	502	150	652	269	3,112	3,380	4,032
SEQ South							
Cunningham	427	113	540	278	2,332	2,610	3,150
Gateway	1,257	657	1,915	546	5,501	6,047	7,962
Total: Brisbane Metropolitan	5,185	1,737	6,922	2,973	24,812	27,785	34,707
Wide Bay Burnett							
Bundaberg Pt Curtis	750	52	802	215	4,477	4,692	5,494
Burnett	863	203	1,066	783	4,446	5,229	6,295
Fraser Coast	866	212	1,078	700	3,560	4,260	5,338
Downs Condamine Maranoa							
Condamine	505	80	584	462	2,724	3,186	3,771
Downs	299	369	668	165	2,409	2,574	3,242
Southern Downs	114	36	149	511	1,157	1,667	1,817
Maranoa	257	63	319	244	1,158	1,402	1,721
Central Qld Whitsundays							
Central Qld	655	181	836	558	3,308	3,866	4,702
Leichardt	259	63	322	283	1,333	1,616	1,938
Mackay	1,006	281	1,287	903	3,585	4,489	5,776
North and Far North Qld							
North Qld	958	333	1,291	1,190	4,265	5,455	6,746
North West Qld	103	23	125	123	615	738	863
FNQ	1,066	280	1,346	1,171	3,977	5,147	6,494
Gold Coast	1,918	1,239	3,158	1,826	13,275	15,102	18,259
Sunshine Coast	1,786	511	2,298	1,409	7,486	8,895	11,192
Total Country Qld	11,406	3,924	15,330	10,544	57,773	68,317	83,647

Total Qld	16,591	5,661	22,252	13,517	82,585	96,102	118,354
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5. SOUTH AUSTRALIA

5.1 REGIONAL STRUCTURE

South Australia is Australia's fifth most populous state with 1,770,375 residents or 6.9% of the Australian population. Bowls South Australia has four identified regions in metropolitan Adelaide, and eight country regions.

The South Australian regions for the 2020-21 Census and for bowls planning and development are:

- ❖ Metropolitan Adelaide
 - ❖ Northern Adelaide
 - ❖ Eastern Adelaide
 - ❖ Adelaide South West
 - ❖ Adelaide Torrens
- ❖ Country South Australia
 - ❖ South-East
 - ❖ Yorke Peninsula
 - ❖ Spencer Gulf
 - ❖ Murraylands
 - ❖ Eyre
 - ❖ Lower Murray
 - ❖ Coorong-Fleurieu
 - ❖ Barossa

The locations of these regions are shown in Figure 5.1.

Prior to the COVID-19 pandemic the South Australian population was growing at an average annual rate of 1.01% per annum of which 27.8% came from natural increase (births over deaths) and 72.2% from net-migration. The COVID pandemic has introduced a new outlook for South Australia which will change the population size and structure over at least the medium term, with implications for the Bowls Regions, operation of clubs and game development. In particular, this includes:

- Considerably lower levels of net-international migration.
- A reduction in negative net-internal migration (interstate and intrastate) with projected continuing net-losses in metropolitan Adelaide but a small level of net-gain in regional South Australia.
- A reduction in the expected average annual growth of South Australia from 0.85% per annum pre-pandemic to an estimated 0.55% per annum post-pandemic. This would result in a State population of 1,880,500 by 2030-31, which is about 63,000 less than pre-COVID projections.
- More rapid ageing of regional populations than previously projected.
- Increased domestic tourism visitation to Bowls Regions in the east and south of the State (which will be enhanced by the removal of State 'border bubbles' with Victoria).

Table 5.1 summarises the estimated COVID impacts.

Table 5.1 Estimated COVID Impacts on South Australian Population

Region	2020 Population	Pre-Covid Growth Rate (% per annum)	Post-Covid Projected Growth Rate to 2030-31 (% per annum)	Projected Change in Net-Migration	Change in Domestic O'night Tourism during COVID 2020-21 (%)
Metropolitan Adelaide	1,376,601	1.19%	0.68%	Lower	-25.2%
Barossa	37,834	0.97%		Higher	n.a.
Fleurieu Coorong	54,288	1.60%		Higher	+33.1%
Lower Murray and Murraylands	73,164	0.52%		Higher	n.a.
South-East	67,365	0.41%		Higher	n.a.
Spencer Gulf	50,593	-0.24%		No change	-5.5%
Yorke Peninsula and Eyre	110,530	-0.16%		No change	+10.8%
Total: Country SA	393,774	0.40%	0.09%	Higher	+11.7%
Total SA	1,770,375	1.01%	0.55%	Lower	-3.0%

5.2 PARTICIPANTS

Table 5.2 summarises bowls participation by major segment. In total, there were 41,903 participants in bowls competitions and programs (of at least 4 games duration) in South Australia during 2020-21. Specifically,

The greatest participation segment in South Australia was social bowls, with 55.0% of participants.

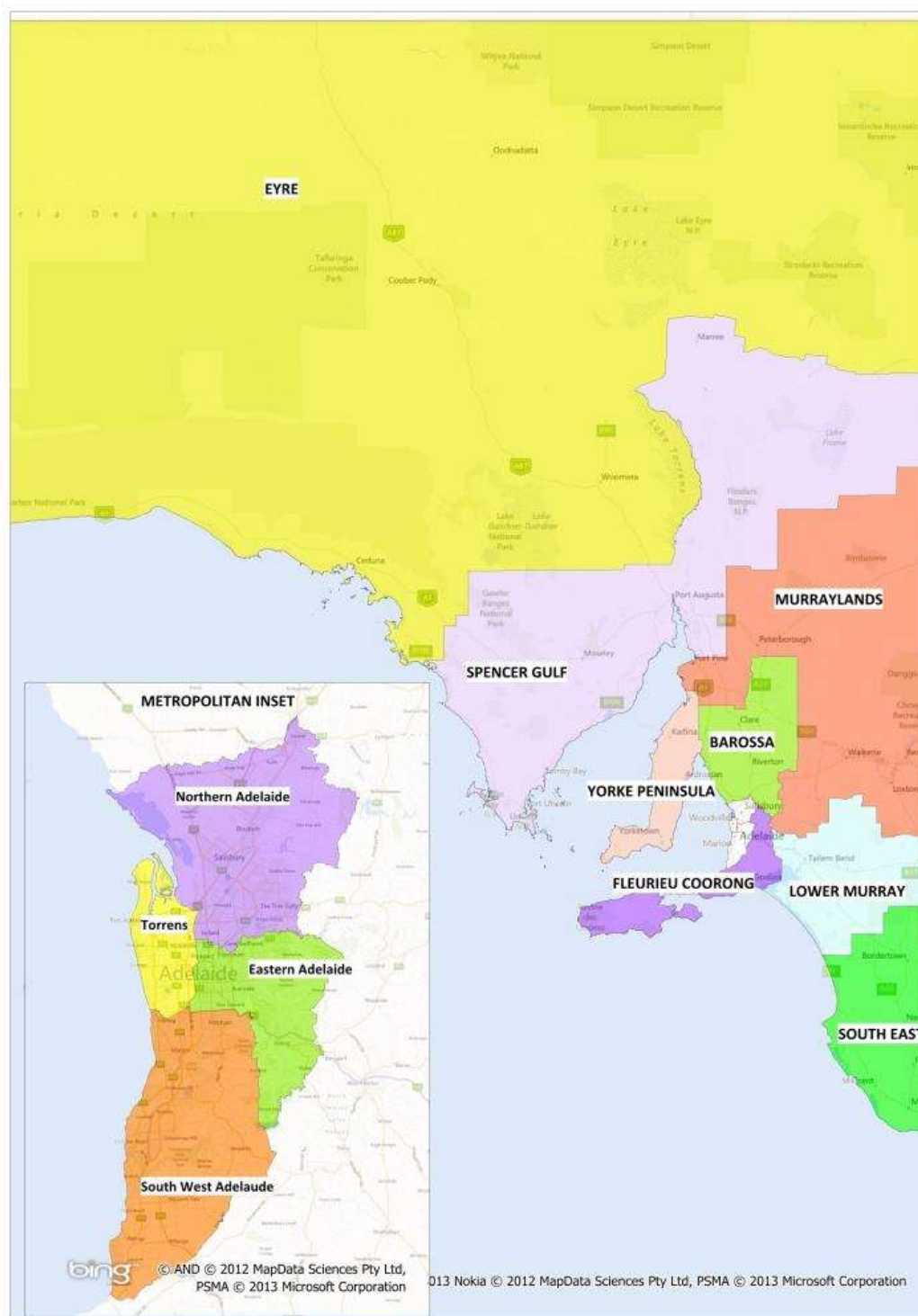
The number of competition participants in 2020-21 has been bolstered by about 6,000 participants in a competition form of "Night Owlers" bowling

Male participation makes up 62.8% of all bowls participation in South Australia.

Participation in country South Australia (24,390) is higher than metropolitan participation (17,513) and the largest regions for bowls participation are Adelaide Torrens, Barossa and South-West Adelaide.

Many bowls participants are involved in more than one structured bowls competition, social or other program. This includes:

- ☐ Pennant and other competition participants who regularly play in more than one competition during the same season or year.
- ☐ Participants involved in both competition and social or corporate bowls.

Figure 5.1 South Australian Bowls Regions

Bowls player to population rates show the extent to which people in each age group and each region are involved in bowls. The overall participation rate in South Australia was 2.37%. The male rate was 3.01% and the female rate was 1.74%.

+ games) in South Australia, 2020-21

Competition Participants			Social Participants			TOTAL Participants
Participant	Jack Attack/School Competitions	Total Competition	Barefoot	Other Social	Total Social	
1,033	160	1,193	860	2,030	2,890	4,084
461	330	792	289	262	551	1,343
2,159	641	2,800	1,427	1,480	2,908	5,708
2,169	497	2,666	1,511	2,202	3,712	6,378
5,823	1,628	7,451	4,088	5,974	10,061	17,513
1,943	408	2,351	1,086	2,662	3,748	6,099
1,652	264	1,916	1,097	1,596	2,693	4,610
328	0	328	33	180	213	541
1,684	357	2,041	535	1,446	1,981	4,022
1,279	579	1,858	386	564	950	2,808
1,010	251	1,261	579	646	1,225	2,486
1,558	91	1,649	519	1,656	2,175	3,825
9,453	1,951	11,404	4,236	8,750	12,986	24,390
15,276	3,579	18,855	8,323	14,724	23,047	41,903

6. VICTORIA

6.1 REGIONAL STRUCTURE

Victoria is Australia's second most populous state with 6,669,670 residents or 26.1% of the Australian population. Bowls Victoria currently has five identified regions in metropolitan Melbourne, and eleven country regions. Victorian regions in the 2020-21 Census and bowls planning and development are:

- ❖ Metropolitan Melbourne
 - ❖ Melbourne West
 - ❖ Northern Gateway
 - ❖ Yarra
 - ❖ Eastern Ranges
 - ❖ Sandbelt
- ❖ Country Victoria
 - ❖ Geelong
 - ❖ West Coast
 - ❖ Wimmera
 - ❖ Murray Mallee
 - ❖ Central Victoria
 - ❖ Bendigo Campaspe
 - ❖ Central Goulburn Murray
 - ❖ Ovens and Murray
 - ❖ Gippsland
 - ❖ Strzelecki
 - ❖ Peninsula Casey

The locations of these regions are shown in Figure 6.1.

Prior to the COVID pandemic the Victorian population was growing at an average annual rate of 1.51% per annum of which 36.3% came from natural increase (births over deaths) and 63.7% from net-migration. The COVID pandemic has introduced a new outlook for Victoria which will change the population size and structure over at least the medium term, with implications for the Bowls Regions, operation of clubs and game development. In particular, this includes:

- Much lower levels of net-international migration.
- An acceleration of net-internal migration (interstate and intrastate) to Regional Victoria with continuing net-losses in metropolitan Melbourne.
- A reduction in the expected average annual growth of Victoria from 1.89% per annum pre-pandemic to an estimated 1.36% per annum post-pandemic. This would result in a State population of 7,769,500 by 2030-31, which is about 502,000 less than pre-COVID projections.
- More rapid ageing of regional populations than previously projected.
- Increased domestic tourism visitation to Bowls Regions throughout Regional Victoria.

Table 6.1 summarises the estimated COVID impacts.

Table 6.1 Estimated COVID Impacts on the Victorian Population

Region	2020 Population	Pre-Covid Growth Rate (% per annum)	Post-Covid Projected Growth Rate to 2030-31 (% per annum)	Projected Change in Net-Migration	Change in Domestic O'night Tourism during COVID 2020-21 (%)
Metropolitan Melbourne*	5,102,515	1.57%	1.43%	Lower	-55.2%
Bendigo Campaspe	203,128	1.19%		Higher	-11.3%
Central Goulburn	155,061	0.97%		Higher	-16.8%
Central Victoria	202,794	1.41%		Higher	n.a.
Geelong	317,857	2.49%		Higher	n.a.
Gippsland	291,051	1.44%		Higher	-1.5%
Murray Mallee	92,972	-0.05%		Higher	-23.6%
Ovens and Murray	180,610	1.08%		Higher	-4.0%
Peninsula Casey	676,800	1.89%		Higher	-13.2%
Strzelecki	171,469	3.33%		Higher	n.a.
West Coast	125,775	0.34%		Higher	-13.5%
Wimmera	59,235	0.27%		Higher	-14.3%
Total Country Victoria	1,594,155	1.34%	0.89%	Higher	-11.0%
Total Victoria	6,696,670	1.51%	1.36%	Lower	-26.8%

* Some areas of Bowls regions in Metropolitan Melbourne are classified as Regional Victoria.

6.2 PARTICIPANTS

Table 6.2 summarises bowls participation by major segment. In total, there were 198,152 participants in bowls competitions and programs (of at least 4 games duration) in Victoria during 2018-19. Specifically,

The greatest participation segment in Victoria was social bowls, with 68.3% of participants.

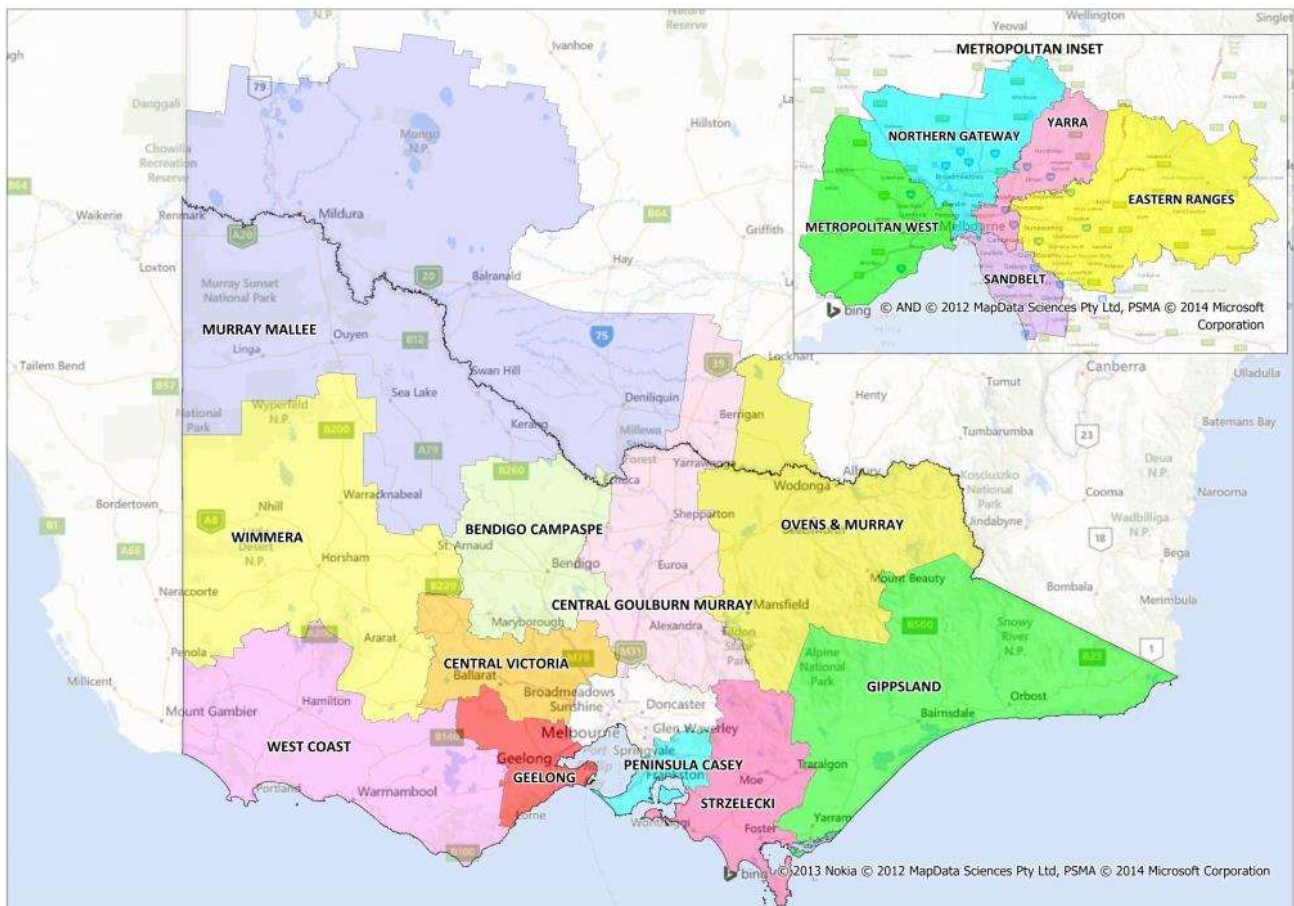
Male participation makes up 72.0% of all bowls participation in Victoria.

Participation in country Victoria (153,808) is much higher than metropolitan participation (44,344) and the largest regions for bowls participation are Central Victoria, Central Goulburn Murray, Bendigo Campaspe, West Coast, Peninsula Casey and Eastern Ranges.

Social bowls participation in 2018-19 in Victoria included 1,314 people in the innovative programs 'Bowling with Babies' (98.5% female and 1.5% male) and 'Mums on the Green'

Many bowls participants are involved in more than one structured bowls competition, social or other program. This includes:

- ☐ Pennant and other competition participants who regularly play in more than one competition during the same season or year.
- ☐ Participants involved in both competition and social or corporate bowls.

Figure 6.1 Victorian Bowls Regions

Bowls participation rates show the extent to which people in each age group and in each region are involved in bowls. The overall participation rate in Victoria was 2.42%. The male rate was 3.25% and the female rate was 1.61%.

Table 6.2 Bowls Participation (4+ games) in Victoria, 2020-21

	Competition Participants			Social Participants			
	Pennant	Jack Attack/School Competitions	Total Competition	Barefoot	Other Social	Total Social	TOTAL Participants
Metro West	824	87	911	316	1,009	1,325	2,236
Northern Gateway	1,455	245	1,700	690	2,184	2,874	4,574
Eastern Ranges	2,168	584	2,752	1,179	4,751	5,931	8,683
Yarra	2,187	723	2,910	1,235	4,382	5,617	8,527
Sandbelt	1,861	634	2,495	1,390	5,046	6,436	8,931
Total Metropolitan Melbourne	8,496	2,272	10,768	4,810	17,373	22,182	32,950
Bendigo Campaspe	3,415	719	4,134	1,165	14,236	15,401	19,535
Central Goulburn	3,183	637	3,820	426	14,632	15,058	18,878
Central Victoria	2,497	523	3,020	1,889	9,217	11,106	14,126
Geelong	1,849	301	2,150	1,127	3,316	4,442	6,592
Gippsland	1,159	323	1,482	1,228	4,649	5,877	7,359
Murray Mallee	1,160	268	1,429	1,005	5,929	6,934	8,363
Ovens and Murray	1,686	273	1,958	256	5,475	5,730	7,689
Peninsula Casey	2,464	1,128	3,592	3,131	8,978	12,109	15,702
Strzelecki	1,662	465	2,127	1,537	6,147	7,684	9,811
West Coast	2,140	565	2,705	1,916	7,288	9,204	11,910
Wimmera	1,439	384	1,823	1,434	6,150	7,584	9,407
Total Country Victoria	22,654	5,587	28,241	15,114	86,017	101,131	129,372
Total Victoria	31,149	7,859	39,008	19,924	103,390	123,314	162,322

7. WESTERN AUSTRALIA

7.1 REGIONAL STRUCTURE

Western Australia is Australia's fourth most populous state with 2,663,561¹² residents or 10.4% of the Australian population. Bowls Western Australia has four regions in metropolitan Perth and four country regions.

The Western Australian regions for the 2020-21 Census and for bowls planning and development are:

- ❖ Metropolitan Perth
 - ❖ Eastern
 - ❖ Northern
 - ❖ Southern
 - ❖ South Coastal
- ❖ Country Western Australia
 - ❖ Eastern Zone
 - ❖ Northern Zone
 - ❖ Southern and South-Western Zone
 - ❖ Central - Pilbara - Kimberley

The locations of these regions are shown in Figure 7.1.

Prior to the COVID pandemic the Western Australian population was growing at an average annual rate of 1.54% per annum of which 44.0% came from natural increase (births over deaths) and 56.0% from net-migration. The COVID pandemic has introduced a new outlook for Western Australia which will change the population size and structure over at least the medium term, with implications for the Bowls Regions, operation of clubs and game development. In particular, this includes:

- Much lower levels of net-international migration.
- A reduction in the expected average annual growth of Western Australia from 1.36% per annum pre-pandemic to an estimated 1.01% per annum post-pandemic. This would result in a State population of 2,958,000 by 2030-31, which is about 126,000 less than pre-COVID projections.
- More rapid ageing of regional populations than previously projected.
- Increased domestic tourism visitation to Bowls Regions throughout Western Australia (and especially Perth-Peel, South-West and Kimberley regions).

Table 7.1 summarises the estimated COVID impacts.

¹² Australian Bureau of Statistics Regional Population Growth 2019-20, Australia, March 2021

Table 7.1 Estimated COVID Impacts on the West Australian Population

Region	2020 Population	Pre-Covid Growth Rate (% per annum)	Post-Covid Projected Growth Rate to 2030-31 (% per annum)	Projected Change in Net-Migration	Change in Domestic O'night Tourism during COVID 2020-21 (%)
Metropolitan Perth	2,125,114	1.80%	1.21%	Lower	-16.7%
Central-Pilbara-Kimberley	108,157	0.77%		No change	-5.3%
Eastern Region	89,319	-0.71%		No change	-5.5%
Northern WA	93,582	0.21%		No change	n.a.
South-West and Southern Zone	247,389	0.96%		Higher	+30.4%
Total Country WA	538,447	0.51%	0.17%	Higher	+15.2%
Total WA	2,663,561	1.54%	1.01%	Lower	+3.8%

7.2 PARTICIPANTS

Table 7.2 summarises bowls participation by major segment. In total, there were 54,764 participants in bowls competitions and programs (of at least 4 games duration) in Western Australia during 2020-21. Specifically,

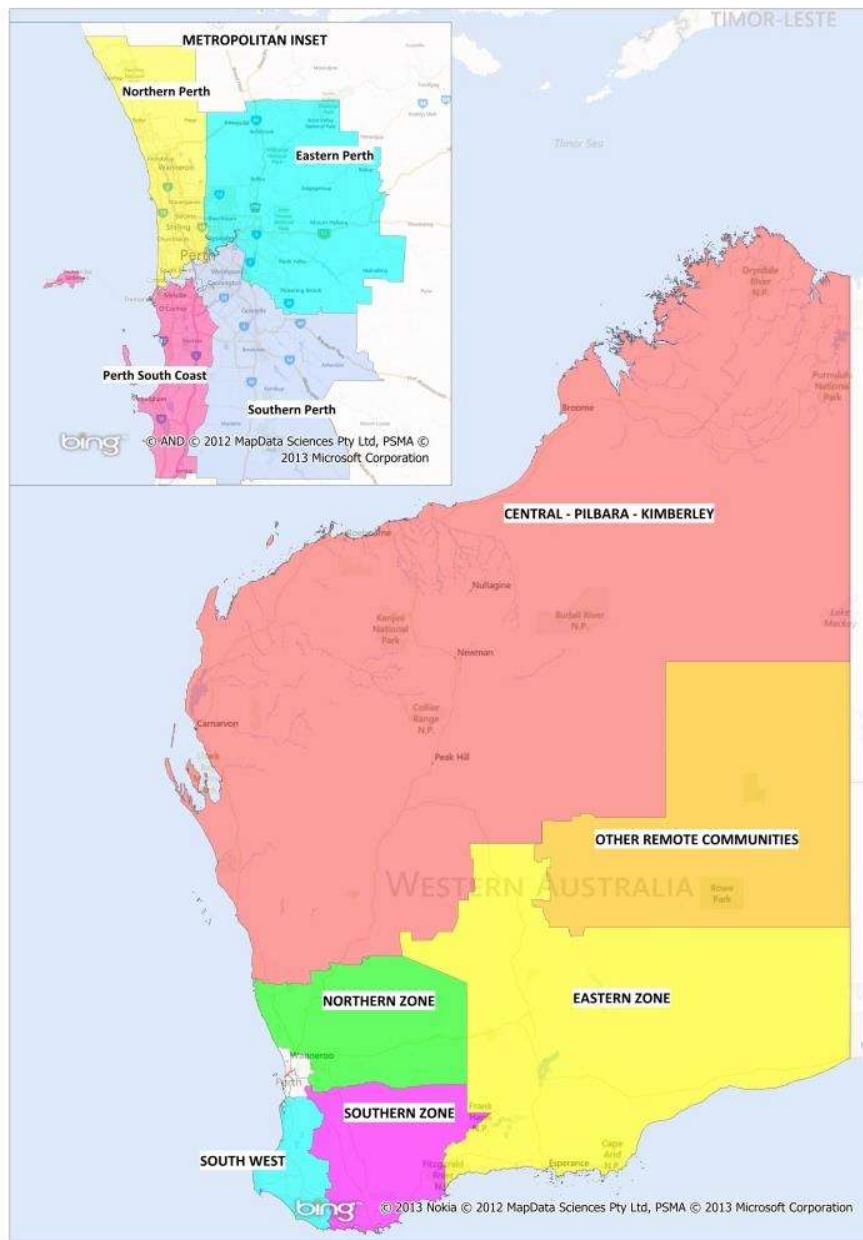
The greatest participation segment in Western Australia was social bowls, with 74.6% of participants.

Male participation makes up 65.6% of all bowls participation in Western Australia.

Participation in country Western Australia (28,853) is relatively high compared with metropolitan participation (25,910) and the two largest regions for bowls participation were South-West and Western Zone, and South Coastal Perth.

Many bowls participants are involved in more than one structured bowls competition, social or other program. This includes:

- ❑ Pennant and other competition participants who regularly play in more than one competition during the same season or year.
- ❑ Participants involved in both competition and social or corporate bowls.

Figure 7.1 Western Australia Regions

Bowls participation rates show the extent to which people in each age group and in each region are involved in bowls. The overall participation rate in Western Australia was 2.06%. The male rate was 2.71% and the female rate was 1.41%.

Table 7.2 Bowls Participation (4+ games) in Western Australia, 2020-21

	Competition Participants			Social Participants		Total Social	TOTAL Participants
	Pennant	Jack Attack/School Competitions	Total Competition	Barefoot	Other Social		
Metropolitan Perth							
Eastern Perth	931	252	1,184	750	2,816	3,566	4,750
Northern Perth	3,228	361	3,589	1,169	4,661	5,830	9,419
South Coastal Perth	2,300	464	2,764	1,823	6,751	8,574	11,338
Southern Perth	701	177	879	349	2,119	2,468	3,347
Total Metropolitan Perth	7,161	1,254	8,415	4,092	16,346	20,438	28,853
Central-Pilbara-Kimberley	825	196	1,021	749	3,229	3,979	4,999
Eastern Region	500	120	620	437	1,654	2,090	2,711
Northern WA	1,036	130	1,166	745	3,885	4,630	5,796
South West and Southern Zone	2,092	579	2,670	2,567	7,167	9,734	12,404
Total Country WA	4,452	1,025	5,477	4,498	15,935	20,433	25,910
Total WA	11,613	2,279	13,892	8,590	32,281	40,872	54,764

8. TASMANIA, AUSTRALIAN CAPITAL TERRITORY AND NORTHERN TERRITORY

8.1 REGIONAL STRUCTURE

Tasmania is Australia's smallest state (and ranks sixth among states and territories) with 540,780¹³ residents or 2.1% of the Australian population. Bowls Tasmania has four regions; Hobart and South and three country regions.

The Tasmanian regions in the 2020-21 Census and for planning bowls development are

- ❖ Metropolitan Hobart and South
- ❖ Country Tasmania
 - Launceston and North
 - North West
 - East.

The Northern Territory is Australia's least populous state/territory with 246,143¹⁴ residents or 1.0% of the Australian population. Northern Territory Bowls has three longer-term identified regions; one metropolitan region and two country regions.

The Northern Territory regions for longer term Bowls Censuses and for planning bowls development are

- Metropolitan Darwin and Top End
- Katherine Barkly
- Central Australia.

However, in the 2020-21 Census, the Northern Territory continues as a single reporting region.

The Australian Capital Territory has 431,380¹⁵ residents, or 1.7% of the Australian resident population. The ACT is classified as one administration region, although Bowls ACT encompasses bowls competitions and programs which extend beyond the Territory's border and includes the Queanbeyan area (with an additional population of 63,771 residents).

The locations of these regions are shown in Figure 8.1.

Prior to the COVID pandemic:

- Tasmania's population was growing at an average annual rate of 1.16% per annum of which just 21.2% came from natural increase (births over deaths) and 78.8% from net-migration.
- Northern Territory's population was not growing at all. Although the Territory had natural increase of 1.0% this was exactly offset by -1.0% in net-migration.
- Australian Capital Territory's population was growing at an average annual rate of 1.20% per annum of which 66.3% came from natural increase and just 33.7% from net-migration.

13 Australian Bureau of Statistics Regional Population Growth 2019-20, Australia, March 2021

14 Australian Bureau of Statistics Regional Population Growth 2019-20, Australia, March 2021

15 Australian Bureau of Statistics Regional Population Growth 2019-20, Australia, March 2021

The COVID pandemic has introduced a new outlook for Tasmania and both Territories which will change the population size and structure over at least the medium term, with implications for the Bowls Regions, operation of clubs and game development. In particular, this includes:

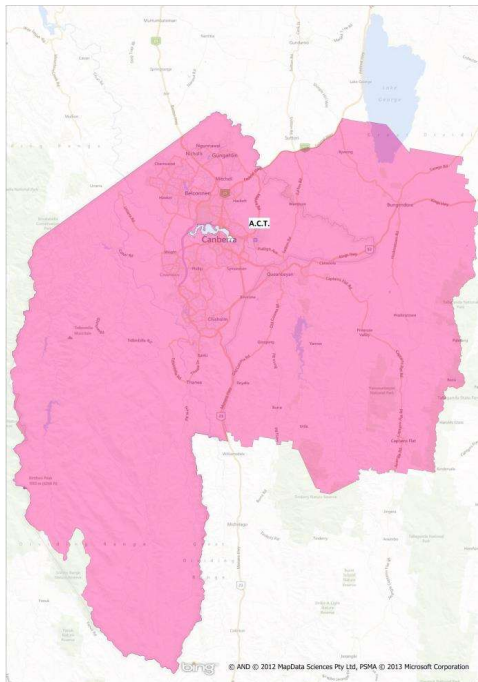
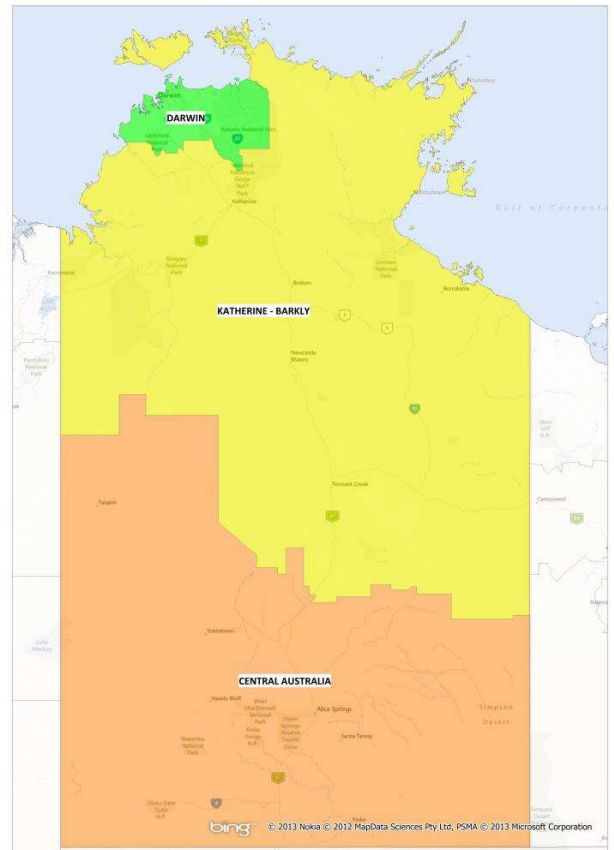
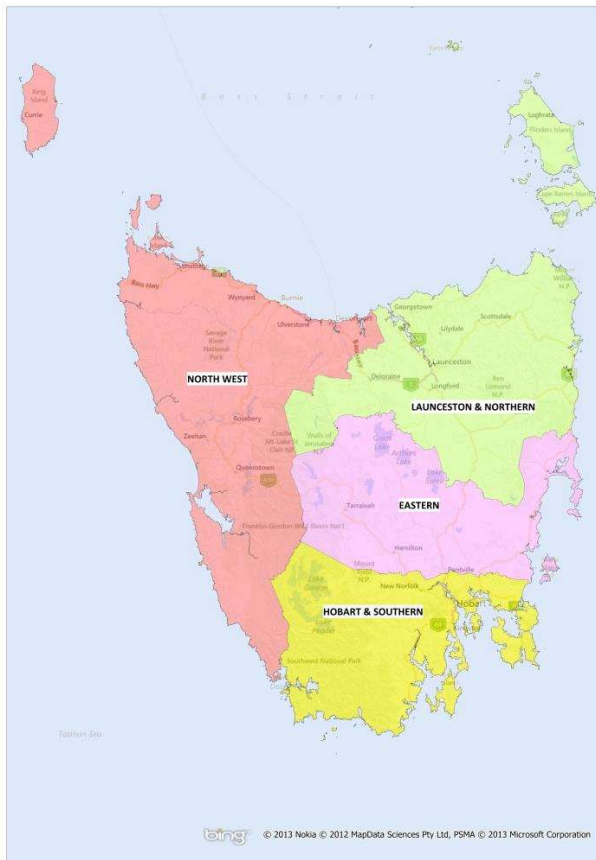
- Lower levels of net-international migration. This is most significant for Tasmania where almost 60% of recent population growth has come from international migration (although this was negligible in the Northern Territory even prior to the COVID pandemic).
- A reduction in the expected average annual growth of:
 - o Tasmania from 0.91% per annum pre-pandemic to an estimated 0.65% per annum post-pandemic. This would result in a State population of 579,400 by 2030-31, about 18,000 less than pre-COVID projections.
 - o Northern Territory from 0.11% per annum pre-pandemic to an estimated 0.01% per annum post-pandemic. This would result in a Territory population of 243,000 by 2030-31, about 4,500 less than pre-COVID projections.
 - o Australian Capital Territory from 0.99% per annum pre-pandemic to an estimated 0.72% per annum post-pandemic. This would result in a Territory population of 465,400 by 2030-31, about 15,000 less than pre-COVID projections.
- More rapid ageing of the State and Territories populations than previously projected (although this is less of an issue in the NT which has a younger population than the rest of Australia).
- Increased domestic tourism visitation to Bowls Regions throughout Tasmania, Northern Territory and Australian Capital Territory.

Table 8.1 summarises the estimated COVID impacts.

Table 8.1 Estimated COVID Impacts on the Tasmanian, ACT and Northern Territory Populations

Region	2020 Population	Pre-Covid Growth Rate (% per annum)	Post-Covid Projected Growth Rate to 2030-31 (% per annum)	Projected Change in Net-Migration	Change in Domestic O'night Tourism during COVID 2020-21 (%)
Metropolitan Hobart	279,002	1.26%	0.69%	Lower	+2.0%
Eastern Tasmania	38,853	1.28%		No change	n.a.
Launceston and North	109,170	1.15%		Higher	+1.5%
North-West Tasmania	113,755	0.88%		No change	n.a.
Total Country Tasmania	261,778	1.05%	0.33%	Higher	+14.6%
Total Tasmania	540,780	1.16%	0.65%	Lower	+13.1%
Australian Capital Territory	431,380	1.20%	0.72%	Lower	+13.9%
Northern Territory	246,143	0.00%	0.01%	Higher	-8.5%

Figure 8.1 Tasmanian, Northern Territory and Australian Capital Territory Bowls Regions



8.2 PARTICIPANTS

Table 8.2 summarises bowls participation by major segment. Specifically,

Social bowls is now dominant in both Territories and Tasmania, with 97.5% in Northern Territory, 79.2% in the ACT and 77.7% in Tasmania.

Male participation makes up 65.0%, 58.0% and 63.7% of all bowls participation in Tasmania, Northern Territory and Australian Capital Territory, respectively. The Northern Territory has the highest rate of female participation of all states/territories

Bowls participation rates show the extent to which people in each age group and in each region are involved in bowls. The overall participation rate in the Australian Capital Territory was 1.04%, Tasmania was 4.14%, while the Northern Territory's rate was 6.11%. The male and female participation rates were:

	Male	Female
ACT	1.33%	0.74%
Tasmania	5.44%	2.87%
NT	6.90%	5.27%.

Table 8.2 Bowls Participation (4+ games) in Tasmania, Northern Territory and Australian Capital Territory, 2020-21

	Competition Participants			Social Participants			
	Pennant	Jack Attack/School Competitions	Total Competition	Barefoot	Other Social	Total Social	TOTAL Participants
Tasmania							
Hobart and South	1,393	398	1,791	1,312	5,175	6,486	8,278
Total Metropolitan Tasmania	1,393	398	1,791	1,312	5,175	6,486	8,278
Eastern Tasmania	157	40	197	160	718	878	1,074
Launceston and North	1,326	372	1,698	1,176	4,609	5,785	7,484
North-West Tasmania	1,009	287	1,296	880	3,380	4,259	5,555
Total Country Tasmania	2,492	699	3,191	2,216	8,706	10,922	14,113
Total Tasmania	3,885	1,097	4,982	3,528	13,881	17,409	22,391
Australian Capital Territory	771	294	1,065	1,248	2,813	4,061	5,126
Northern Territory	279	100	379	1,190	13,466	14,656	15,035

