

An assessment of the
behaviours and motivations of
students in Higher Education to
participate in sport with specific
reference to the sport of Rowing

Prepared for: BUCS and British Rowing



- Background and objectives
- Key insights
- Participation in sport, exercise or physical activity
- Sport motivators
- Sport barriers
- Rowers in focus
- University rowing clubs
- Increasing participation in rowing

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Background & objectives

Background & Objectives

As students transition to university, for many it is seen as an opportunity to re-invent themselves, try something new and step outside their comfort zone. Sport provides potential for social integration and enhancing the student experience - both key factors in university retention...

There is the prospect therefore for university sport to attract new audiences. To achieve this, insight into how to position sport relative to other activities and promote it to a range of students, who previously had not considered it, is crucial. Understanding students and their motivations, needs and barriers to participation at this important life stage underpins their success

Objective: To understand how to facilitate greater student participation in sport with a focus on rowing

Barriers & Motivators

- What are the barriers for students (both practical and perceived)?
- What are their key motivators and values?

Offer & Environment

- What is the offer that best suits their needs?
- What changes need to be made to facilitate and encourage participation?

Messaging

- What needs to be communicated to influence this audience – tone, message, reassurances?

Who we spoke to – qualitative research



We spoke with non-rowers, lapsed rower and rowers...

Universities

Regatta

University of
Bath

University of the
West of England

University of
Nottingham

BUCS Regatta

Male
6 respondents

Female
4 respondents

Female
9 respondents

Female
6 respondents

Male
8 respondents

Male
8 respondents

Current Rowers

- Queens University, Belfast (Male)
- St Andrews University (Female)
- University of Durham (Male / Female)

• Non-Rowers:

- Never expressed an interest in rowing before
- Non rejecters of rowing in the future
- Half were moderately active i.e. students that participate in sport or activity for half an hour more than once a month, but less than once a week
- Half were less active i.e. students that participate in sport or activity for half an hour less than once a month

• Lapsed Rowers:

- Not rowing currently, but have done in the past i.e. prior to starting university
- Open to potentially taking up rowing again in the future
- Half were moderately active i.e. students that participate in sport or activity for half an hour more than once a month, but less than once a week
- Half were less active i.e. students that participate in sport or activity for half an hour less than once a month

Who we spoke to – quantitative research



We spoke with a representative sample of University students as well as rowers at the BUCS regatta, 6th formers who are members of British Rowing and lapsed British Rowing members

Universities

1,012 University students through an online panel

Regatta

78 participants at the BUCS regatta

6th formers

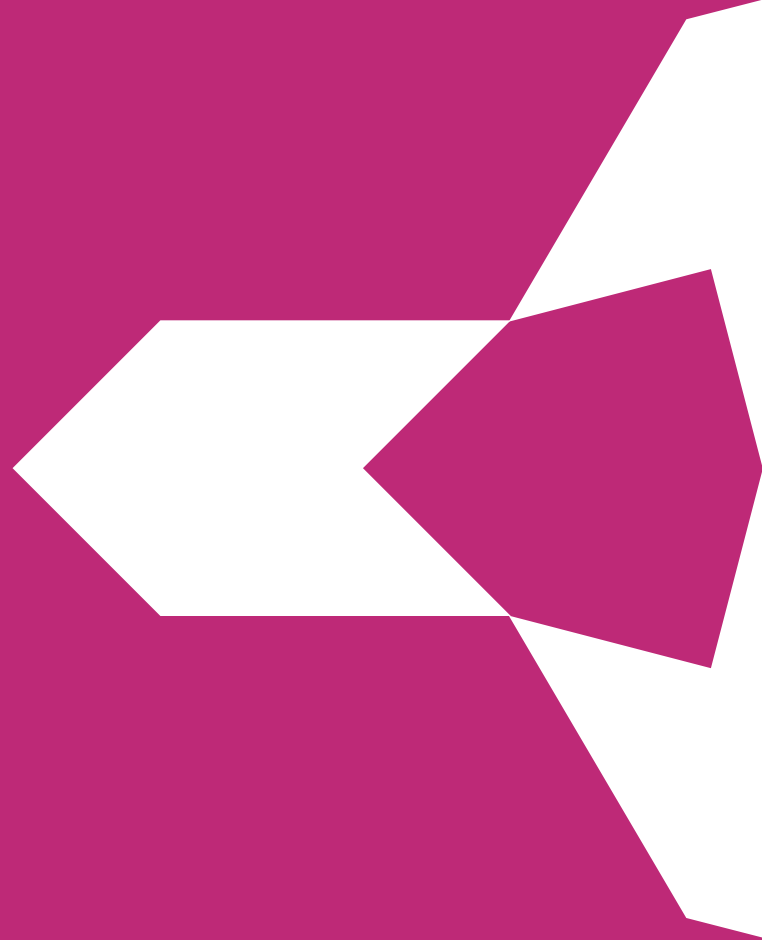
267 online interviews with current rowers sourced from British Rowing database of 6th formers

British Rowing lapsed members

278 online interviews with lapsed British Rowing members sourced from British Rowing database

- For results at a total level we have based the results on the online sample so that it is representative of University students.
- Where we focus in on rowers we use the results from the regatta merged with the online survey.
- Results from the 6th formers and lapsed British Rowing members are included at the end of the report

Key insights



Key Insights



- Perceptions of university sport differ across institutions – but generally, club-based participation is felt to be too performance driven, which can feel off-putting to recreational users
- This is especially important as our research highlights that competition is not a key motivation for the vast majority of students who take part in sport, exercise or physical activity



- The particular issue for rowing is that there is currently no opportunity to take part recreationally (be it inside or outside of a club environment)
- There is, however, scope for increasing participation and lots of interest in social and less competitive rowing concepts (such as Film Night Rowing) which are most likely to increase participation



- There are a number of barriers to participation in rowing. Logistical barriers and performance barriers dominate - a third barrier around 'culture' is less tangible and more difficult to directly address through specific initiatives
- On the water rowing is seen as physically demanding, competitive and expensive while indoor rowing is viewed as physically demanding and boring (though more accessible). New concepts and communications need to address these perceptions head on



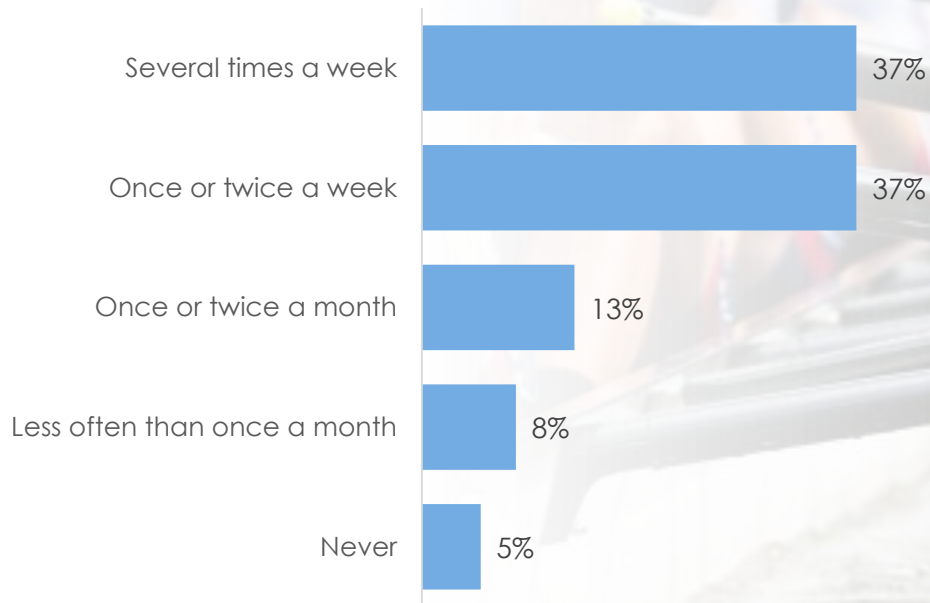
- There are distinct differences in motivations/barriers and attitudes towards sport among indoor and outdoor rowers (and those potentially interested in either)
- However, despite this, there is a clear opportunity to leverage land based rowing as a way into water based rowing – a joined up approach will be far more effective than any individual water or land based proposition in driving overall engagement with rowing as a sport



Participation in sport, exercise
or physical activity

Majority of students say they are physically active

Three-quarters take part in some form of sport, exercise or physical activity at least once or twice a week



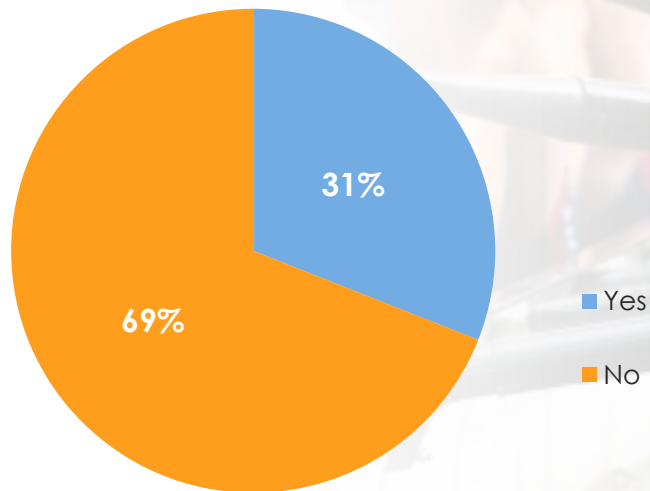
Men (42%) are significantly more likely than women (33%) to say that they take part in activities several times a week

Q6. How often do you take part in sport, exercise or physical activity these days? Physical activity includes activities such as brisk walking, jogging, cycling, swimming, dancing, yoga or any other activity in which the exertion is at least as intense as these activities. Base: All respondents (online only) Excluding NS (1012)



Three in ten claim to be members of sports clubs

Men are more likely than women to be members of any sports or physical activity clubs in University

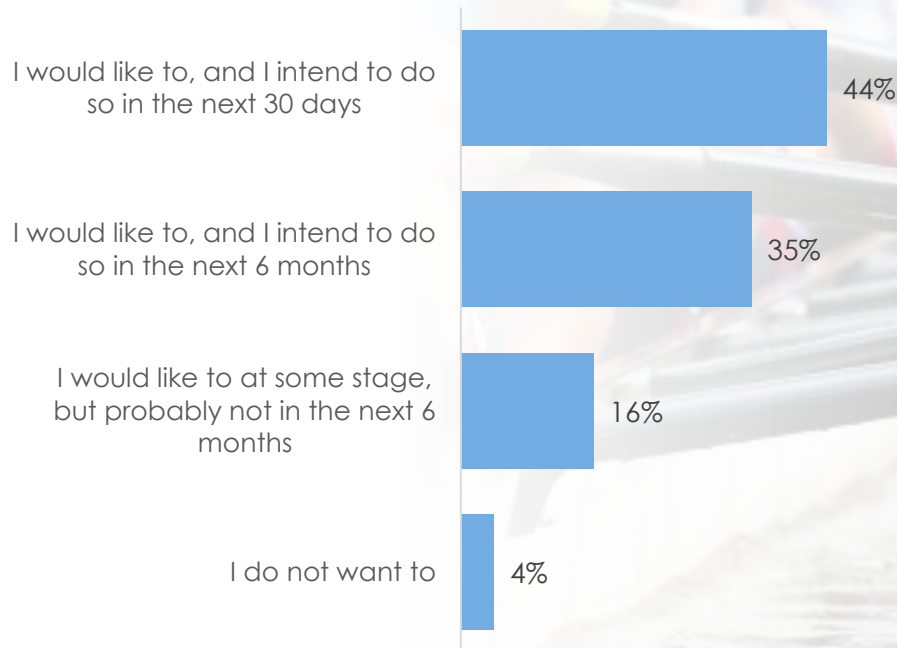


Men (37%) are significantly more likely than women (26%) to say that they are a member of any sports or physical activity clubs in University

Q17e. Are you a member of any sports or physical activity clubs in University? Base: All respondents (online only). Excluding NS (1012)

Majority say they intend to do more exercise

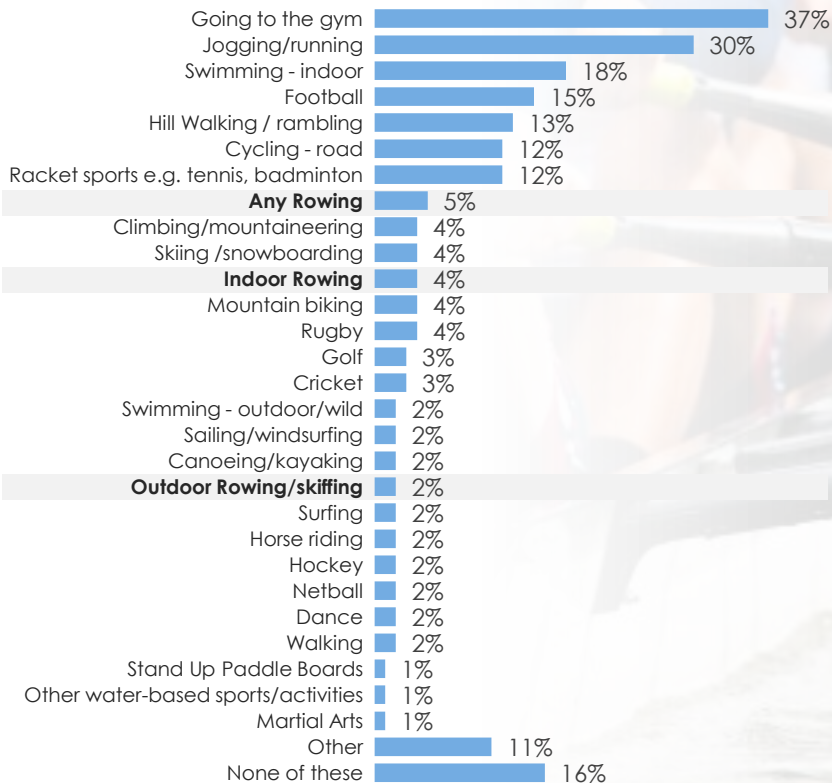
Four in five say they intend to take part sport, exercise or physical activity more often than they do now within the next six months



Students in their first year (49%) are significantly more likely than those in year 2+ (39%) to say they intend to do more activity in the next 30 days

Going to the gym is the most popular activity

4% say that they take part in indoor rowing and 2% rowing on the water

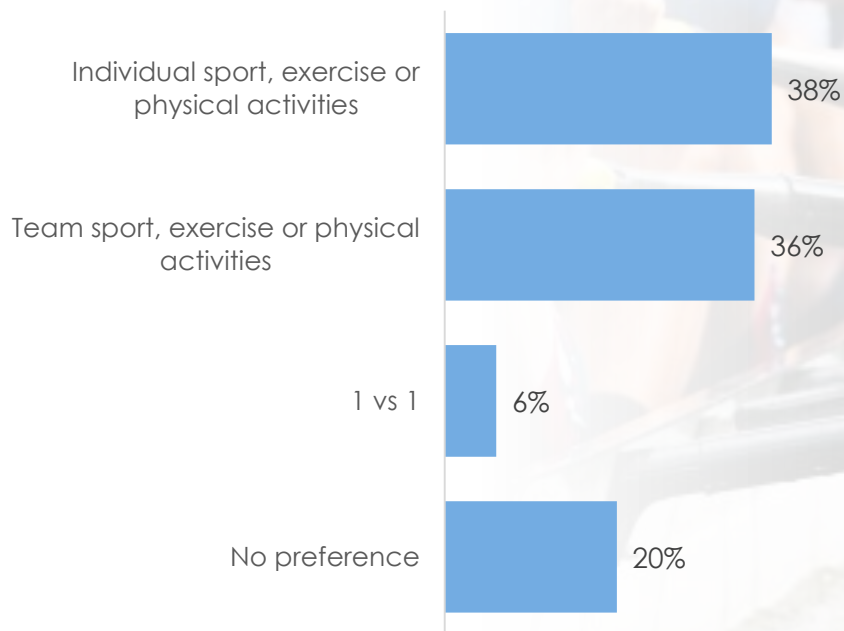


5% say that they take part in any form of rowing activity – there are no significant differences in rowing participation by gender or year at University

40% of students who row say they participated in the sport prior to joining University

Individual and team activities both popular

Individual sports more popular among women and team sports among men



Men are most likely to be interested in team sport (43% of men compared to 30% of women).

Women are significantly more likely to be interested in individual activities (44% compared to 31% of men)



Sport motivators

Competition and achievement is not always core driver to sports participation at university



Keeping Fit / Healthy

- For some this is a key motivator to their sports participation and for others, it is a reason why they think they should be doing more sports

Stress Relief

- General feeling that people need something else in their life other than university work, and sport is perfect for this

Social Aspect

- Sports clubs are a great way to meet new people – particularly for Freshers
- For many, the social aspect of clubs is as important as the activity / sport itself

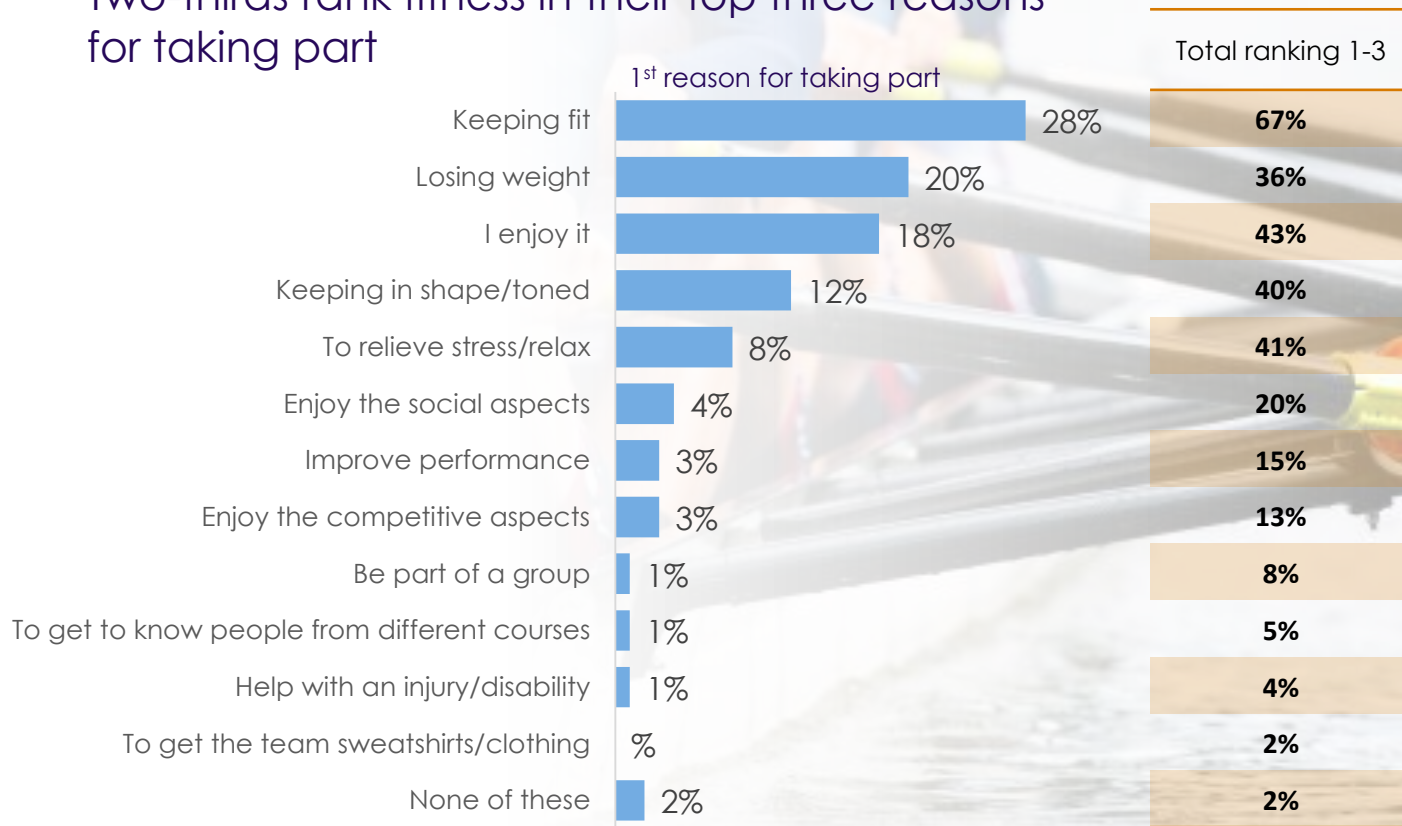
Competitive Aspect

- Not a driver for everyone, but for some, winning and excelling in a sport is a big reason they do it

Often, university sport places too much emphasis on competition at the expense of the other drivers to participation...

Main reason for taking part in activities is fitness

Two-thirds rank fitness in their top three reasons for taking part



Women are significantly more likely than men to rank losing weight and keeping in shape as main motivators.

Men are significantly more likely than women to be motivated by enjoyment and the competitive/performance aspects

Q13. What are your main reasons for taking part in sport, exercise or physical activity? Base: All respondents (online only) Excluding NS (1012)

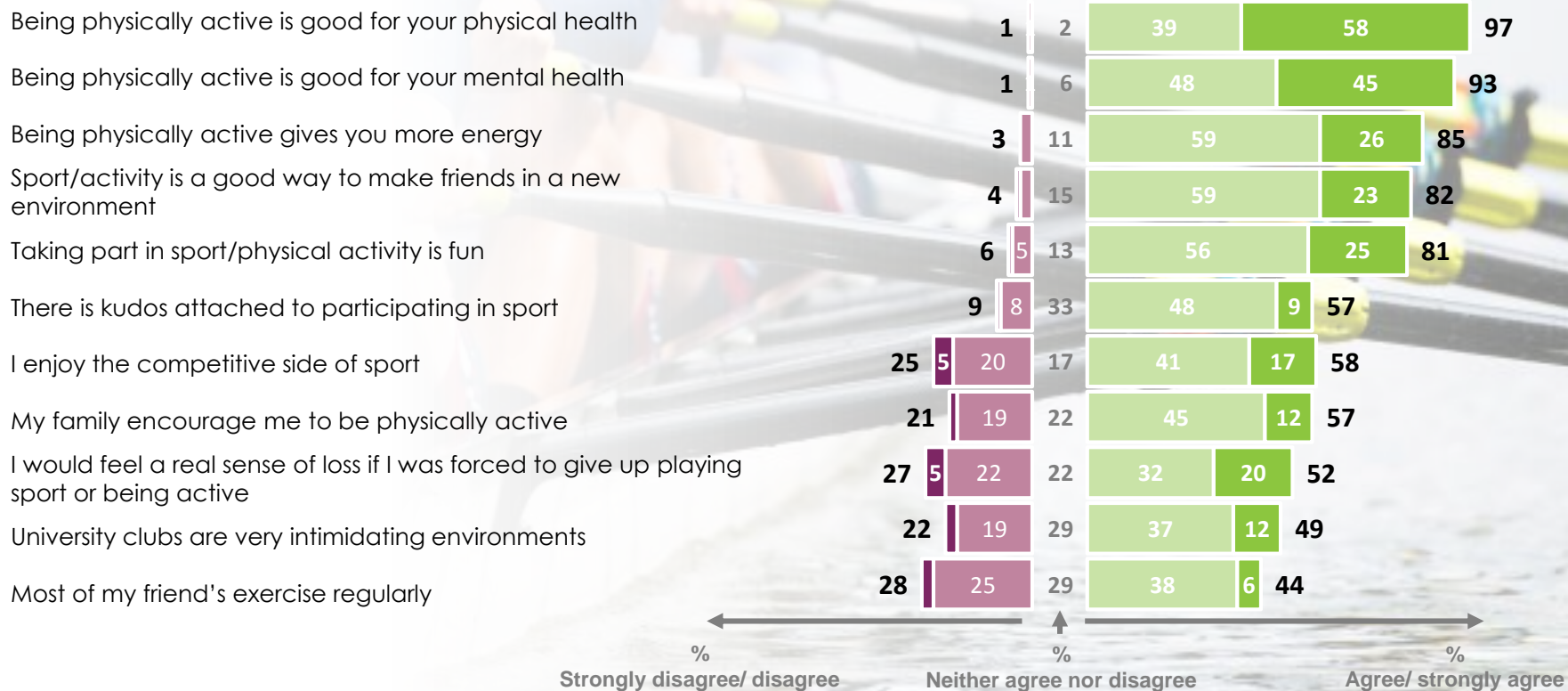
Main motivations differ by activities taken part in

Outdoor rowers are more likely to be motivated by enjoyment rather than purely fitness

	Non-rowers	Rowers	Indoor rowing only	On water rowing
	1 st reason	1 st reason	1 st reason	1 st reason
Keeping fit	28	25	23	26
Losing weight	19	10	28	1
I enjoy it	18	31	21	37
Keeping in shape/toned	12	11	18	7
To relieve stress/relax	8	3	5	2
Enjoy the social aspects	4	2	0	2
Enjoy the competitive aspects	3	7	3	10
Improve performance	3	4	0	6
Base:	(969)	(121)	(39)	(82)

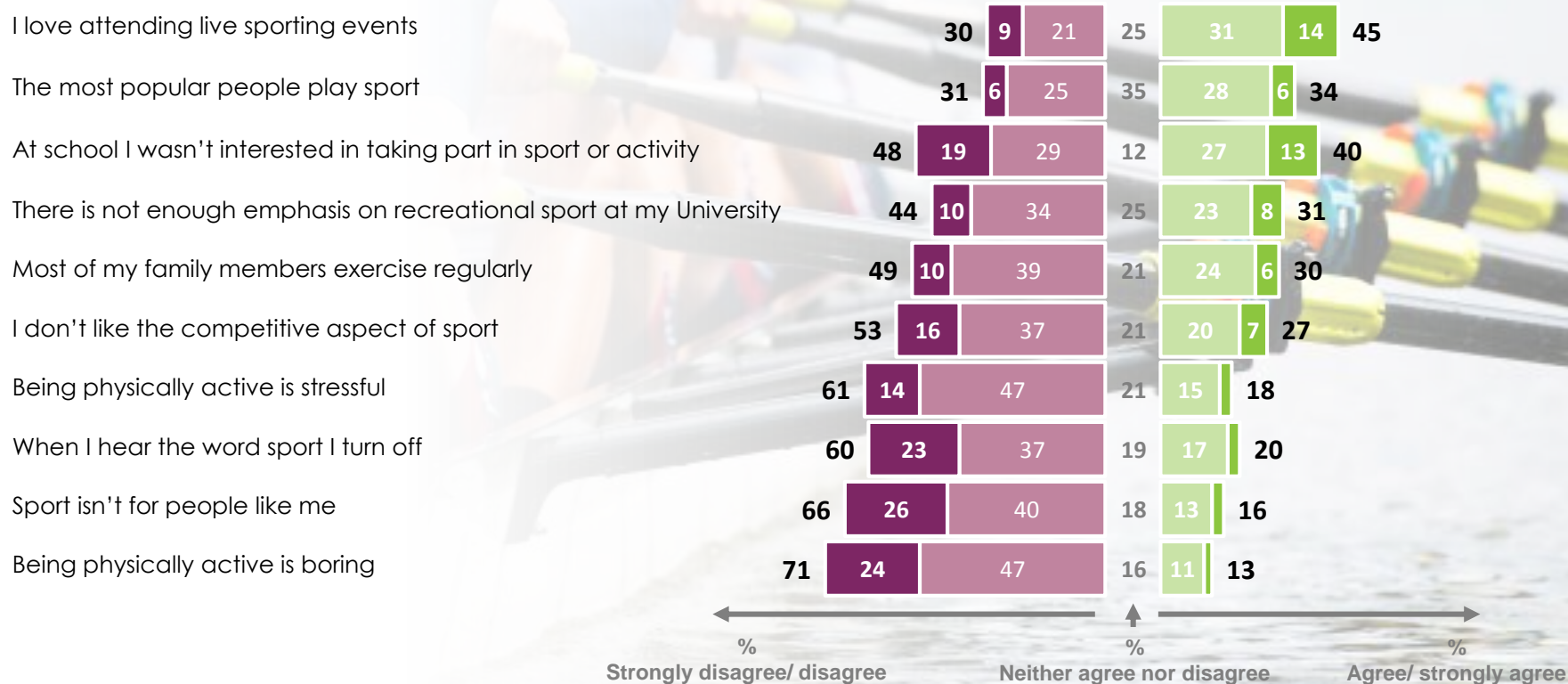
Q13. What are your main reasons for taking part in sport, exercise or physical activity? Base: All respondents Excluding NS

Recognition of the positive benefits of being active



Q15. Thinking about sports, exercise or physical activities in general, how much do you personally agree or disagree with the following statements? Base: All respondents (online only). Excluding NS (1012)

Majority disagree that being physically active is boring



Q15. Thinking about sports, exercise or physical activities in general, how much do you personally agree or disagree with the following statements? Base: All respondents (online only). Excluding NS (1012)

Key differences in attitudes among rowers

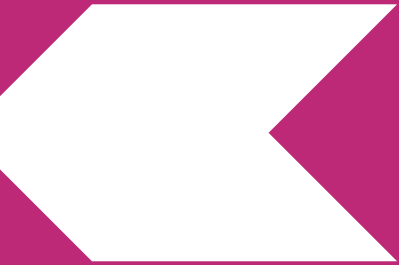
Outdoor rowers attitudes differ from those of indoor and non-rowers

	Non-rowers	Rowers	Indoor rowing only	On water rowing
Sport/activity is a good way to make friends in a new environment	82	86	77	90
Taking part in sport/physical activity is fun	81	89	82	93
I enjoy the competitive side of sport	59	77	51	89
My family encourage me to be physically active	56	69	59	73
I would feel a real sense of loss if I was forced to give up playing sport or being active	51	85	74	90
University clubs are very intimidating environments	50	27	38	22
Most of my friend's exercise regularly	44	56	46	61
I love attending live sporting events	45	72	49	83
At school I wasn't interested in taking part in sport or activity	39	26	41	18
Most of my family members exercise regularly	29	45	28	52
I don't like the competitive aspect of sport	26	17	28	11
Base:	(969)	(121)	(39)	(82)

Q15. Thinking about sports, exercise or physical activities in general, how much do you personally agree or disagree with the following statements? Base: All respondents. Excluding NS

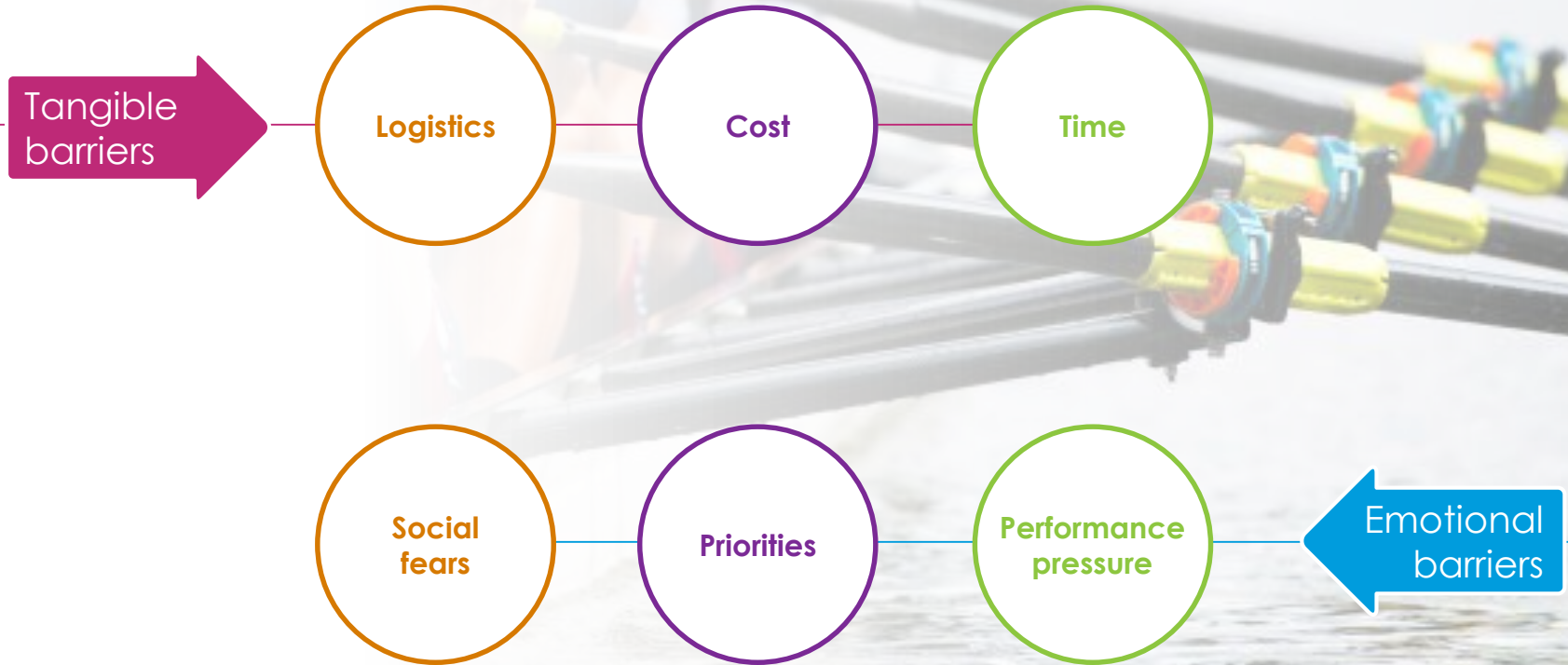
Differences by gender

- Women are more likely to say that:
 - **University sports clubs are intimidating environments**
(57% agree compared to 41% of men)
 - **They don't like the competitive aspects of sport**
(31% agree compared to 21% of men)



Sport barriers

There are a wide range of barriers to sports participation at university – tangible, and emotional...



Spontaneous barriers to sport participation at university are generally tangible



Tangible
barriers

Logistics

- Getting to sports facilities can be an issue for some i.e. living off campus, or facilities being a distance away from campus

Cost

- Taking part in sport can often be expensive
- Gym passes alone are felt to be over-priced at many institutions
- When you factor in sports club memberships on top (plus travel costs / equipment purchase), it can become prohibitive

Time

- Many find it hard to manage their schedules at university after the rigid itineraries they were used to at school
- Fitting in training sessions and competitions around everything else can be a challenge

These tangible barriers are particularly pertinent for a sport such as rowing

However, there are a number of emotional barriers that also factor into the equation



- **Friendliness:** Many are scared to attend on their own. This fear is exacerbated if starting part way through the year as everyone else will already know each other
- **'Initiations':** are common in some teams, which can be off-putting – particularly for female students
- **Elitism** is also a fear for some, in relation to specific sports e.g. rowing, rugby

- Many feel they should be concentrating on studies, particularly given how much they are paying in tuition fees! Sport can be seen as a distraction
- Any spare time is often reserved for socialising and making friends – not necessarily for sport friends, and sport is sometimes side-lined

- Often, sports teams are felt to be too performance focussed, at the expense of casual participation
- A fear amongst some that if they're not good enough for the team, then they're not welcome as part of the club



Drivers and barriers – in their own words...



"The three campuses are spread out, so if you aren't on the main campus you miss out on the facilities"

Female, UWE

"I go to the gym maybe three times a week when I have the time - it helps to keep me fit and healthy"

Male, Bath

"I stopped just because the gym's expensive and I didn't want to pay"

Female, Nottingham

"You need something else in your life other than just work and uni"

Male, Nottingham

"At school, sports always happened at the end of the day. It felt like a set task. At uni your schedule is different every day, and it's harder to fit sport in"

Male, Nottingham

"I love it when we win, and with Inter Mural Teams you win more than when it's uni vs uni because the standard is lower"

Male, Bath

"The standard is also really good. Even those sports that I would try for, everyone seems incredible. They train a lot more than I would give up my time at uni"

Male, Nottingham

"It's just really social. My best friends at uni are the one's I've made through rugby"

Female, Bath



Perceived lack of time main barrier to participating more

Lack of time and need to focus on study are the key barriers to taking part in more activities



Q16. The following are reasons why some people do not participate more in sports, exercise or physical activities? Please rank the top three reasons that apply to you. Base: All respondents (online only). Excluding NS (1012) Responses over 2% shown

Differences by gender

- Women are more likely to say that:
 - **They would feel embarrassed about their body**
(28% rank in top three barriers compared to 20% of men)
 - **Would feel embarrassed about their lack of fitness**
(34% rank in top three barriers compared to 24% of men)

Barriers to participating more differ slightly for rowers

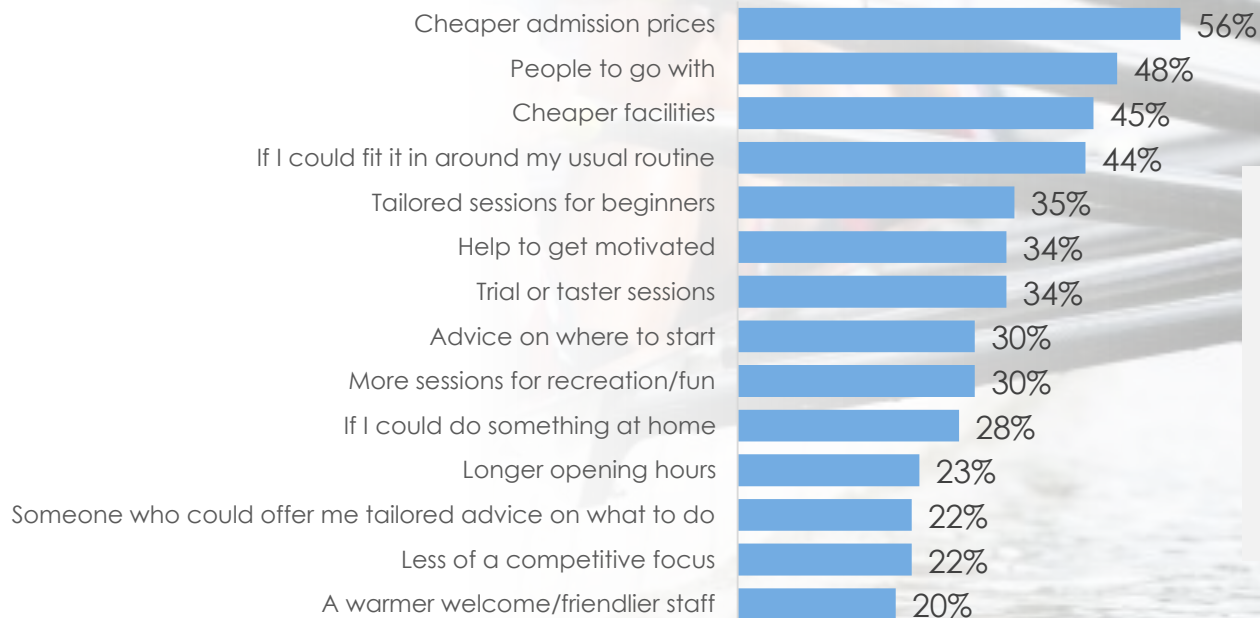
On water rowing is perceived as requiring a significant commitment

	Non-rowers	Rowers	Indoor rowing only	On water rowing
	1 st reason	1 st reason	1 st reason	1 st reason
Too busy	17	26	8	35
Need to focus on study	12	11	5	13
Would feel uncomfortable/out of place	11	5	8	4
Would feel embarrassed about my lack of fitness	9	8	15	5
Would feel embarrassed about my body	9	4	13	0
Too tired	7	6	5	6
Don't have anyone to go with	6	3	5	2
Don't enjoy it	5	7	15	2
Health/ Issues	4	2	0	2
Don't want the commitment	3	7	0	10
Too much pressure to train/perform	3	2	3	2
Base:	(969)	(121)	(39)	(82)

Q16. The following are reasons why some people do not participate more in sports, exercise or physical activities? Please rank the top three reasons that apply to you. Base: All respondents Excluding NS

Students say cheaper prices would increase activity

Beyond cost, people to go with, being able to fit it around their usual routine and tailored sessions for beginners might help students to take part in exercise, sport or physical activity more often



Women are significantly more likely than men to mention a number of issues including:

- Less of a competitive focus
- More sessions for recreation/fun
- Single sex facilities/sessions
- A warmer welcome/friendlier staff
- Tailored sessions for beginners
- Advice on where to start
- People to go with
- Help to get motivated

Q17. Here is a list of things which might help people to take part in exercise, sport or physical activity more often. Which things would help make a big difference to you? Base: All respondents (online only). Excluding NS (1012) Responses over 19% shown

There are different drivers for indoor and on water rowing

Indoor rowers would be likely to take part in more activities if they had people to go with. For on water rowers, it's about fitting it around their routine

	Non-rowers	Rowers	Indoor rowing only	On water rowing
Cheaper admission prices	57	45	38	48
People to go with	48	30	41	24
Cheaper facilities	45	42	38	44
If I could fit it in around my usual routine	44	50	41	55
Tailored sessions for beginners	35	27	26	28
Help to get motivated	34	20	33	13
Trial or taster sessions	34	26	23	27
Advice on where to start	30	17	26	13
More sessions for recreation/fun	30	21	31	16
If I could do something at home	28	15	21	12
Longer opening hours	23	21	23	21
Someone who could offer me tailored advice on what to do	22	15	26	10
Less of a competitive focus	22	6	10	4
A warmer welcome/friendlier staff	20	10	13	9
Base:	(969)	(121)	(39)	(82)

Q17. Here is a list of things which might help people to take part in exercise, sport or physical activity more often. Which things would help make a big difference to you? Base: All respondents. Excluding NS



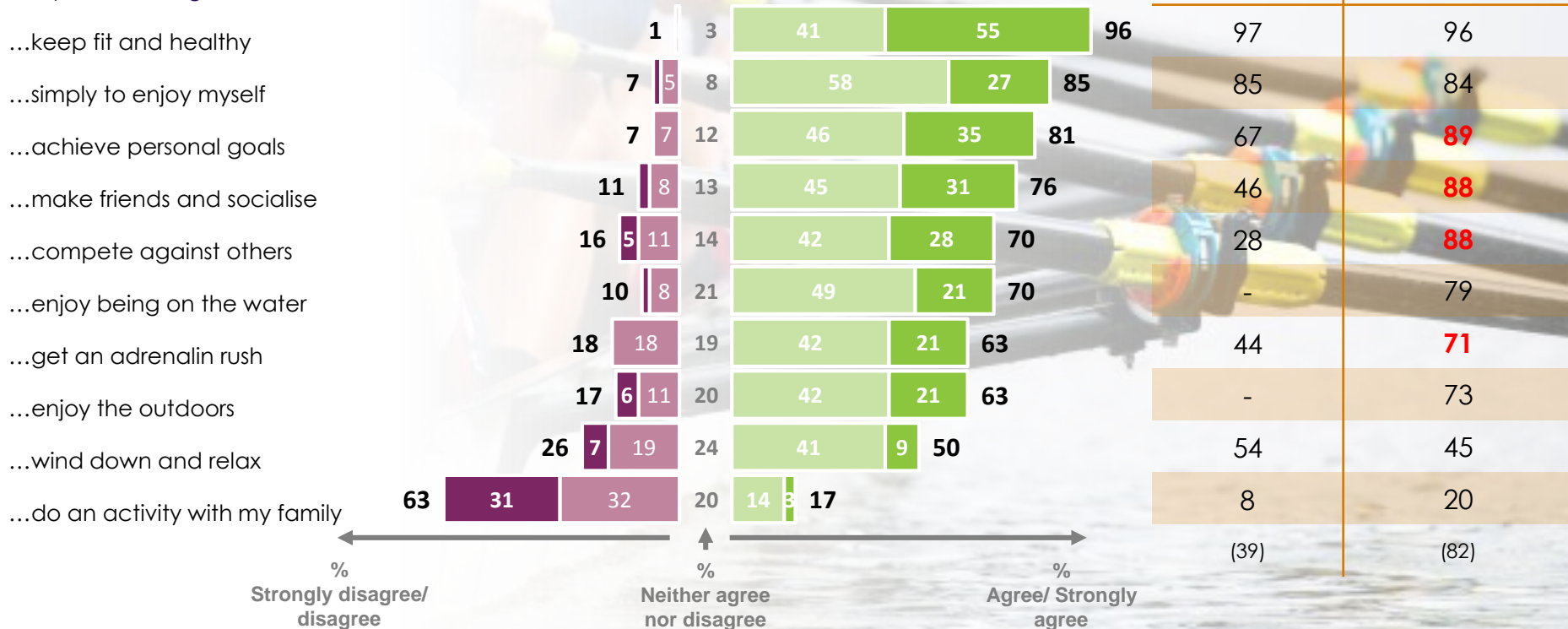
Rowers in focus

Main motivation for taking part in rowing is fitness

% Strongly agree/ agree

Indoor rowing | On water rowing

I take part in rowing to...



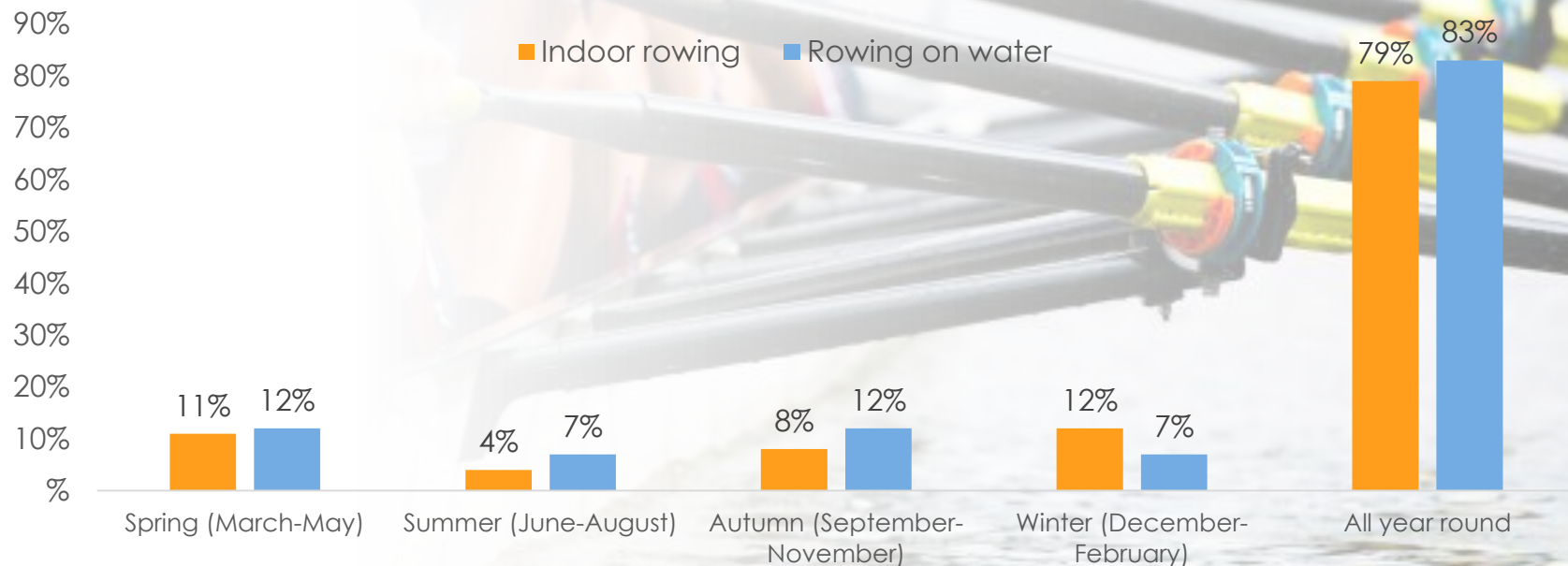
(39)

(82)

Q14. You said that you participate in rowing; to what extent do you agree or disagree with each of these reasons for taking part in rowing? Base: Those who take part in rowing Excluding NS (130)

Majority of rowers take part in rowing all year round

Both indoor and on water rowing are carried out all year round

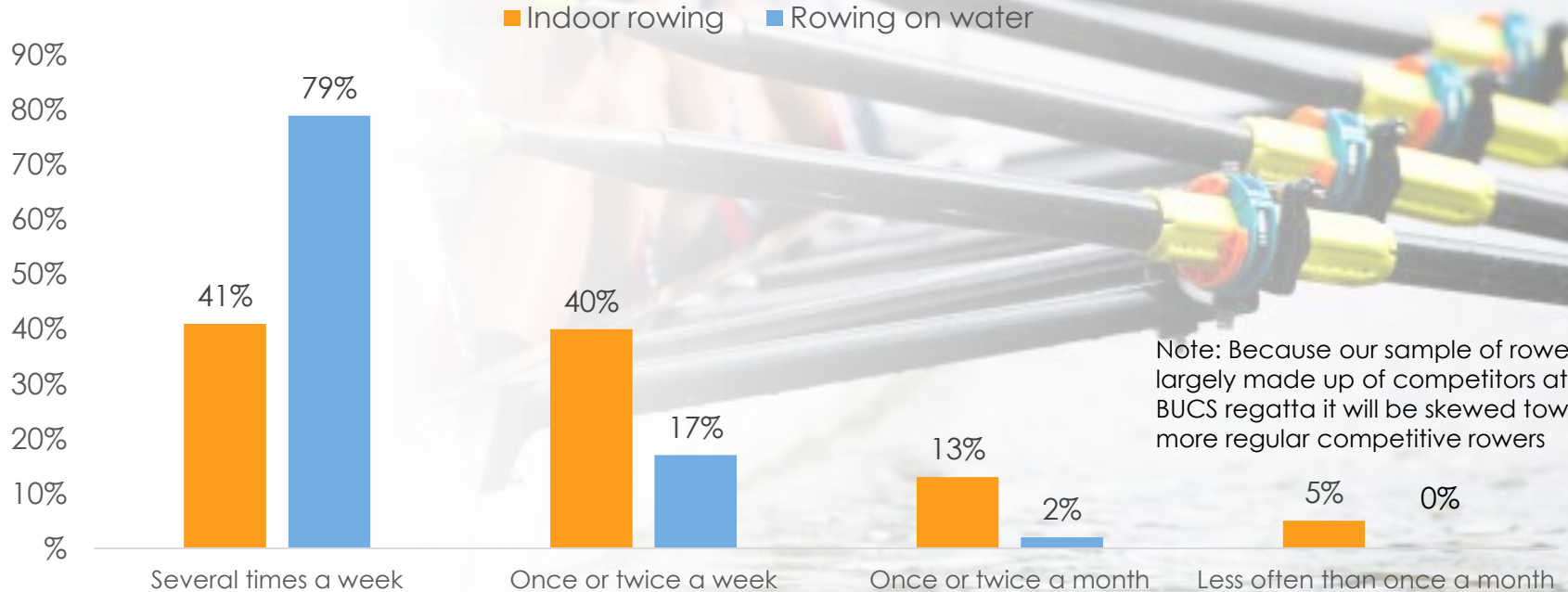


Q9a. At what time of the year do you take part in **indoor rowing**? Base: Those who participate in indoor rowing. Excluding NS (95)

Q9b. At what time of the year do you take part in **rowing on water**? Base: Those who participate in rowing on water. Excluding NS (82)

Outdoor rowers are likely to take part regularly

Four in five take part several times a week



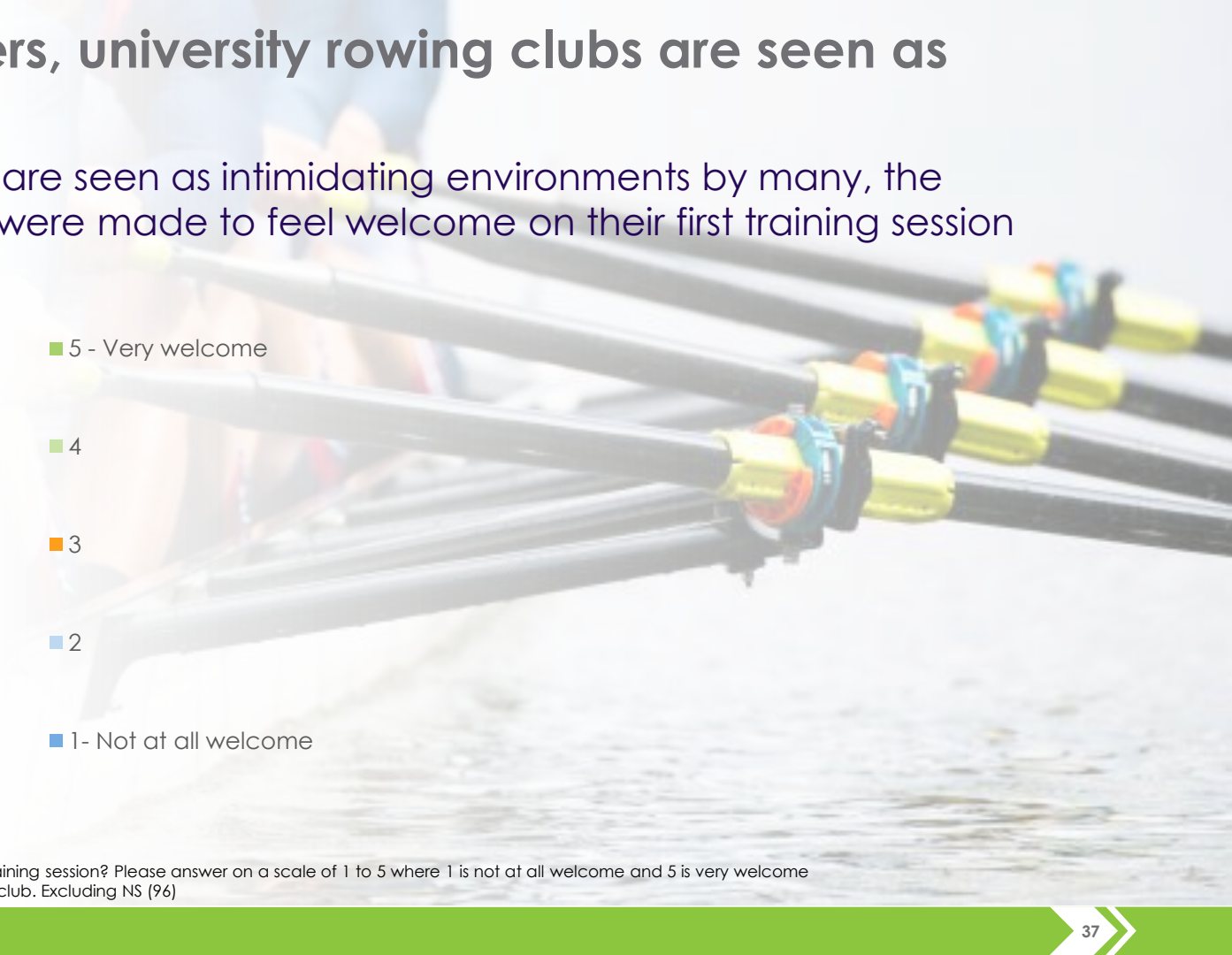
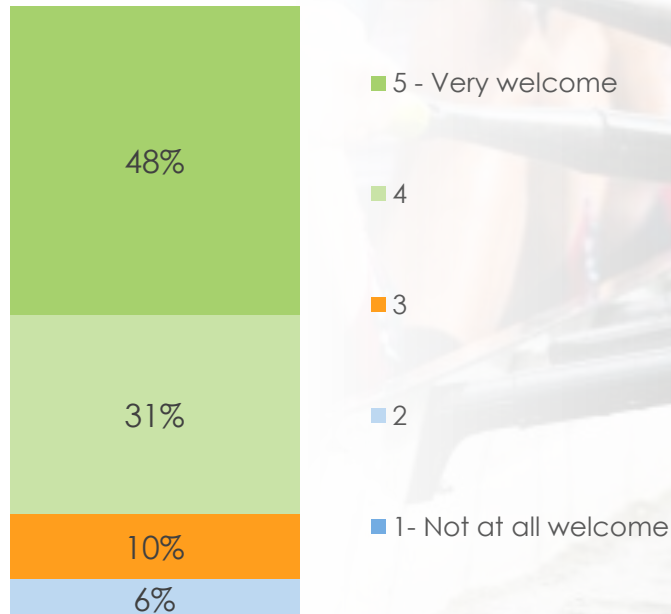
Q10a. How often do you participate in **indoor rowing**? Base: Those who participate in indoor rowing. Excluding NS (95)

Q10b. How often do you participate in **rowing on water**? Base: Those who participate in rowing on water. Excluding NS (82)



Among members, university rowing clubs are seen as welcoming

While university clubs are seen as intimidating environments by many, the majority of members were made to feel welcome on their first training session

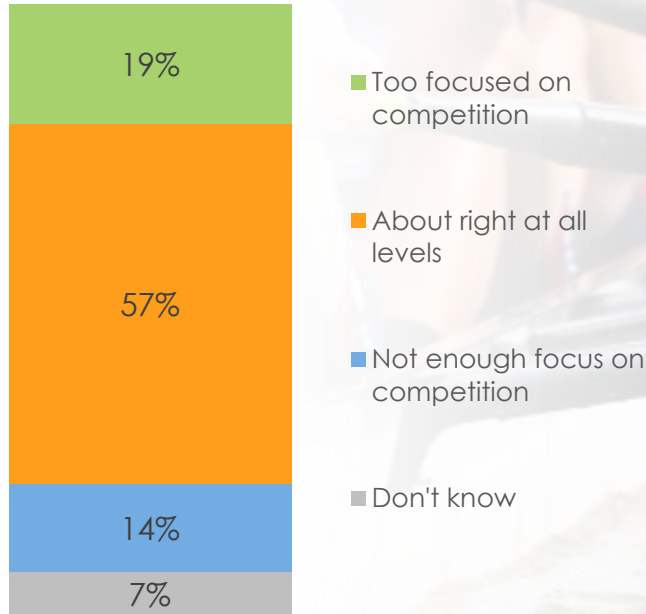


Q19. How welcome did you feel at your first university training session? Please answer on a scale of 1 to 5 where 1 is not at all welcome and 5 is very welcome
Base: Those who are a member of the University rowing club. Excluding NS (96)



Focus on competition vs. recreational rowing

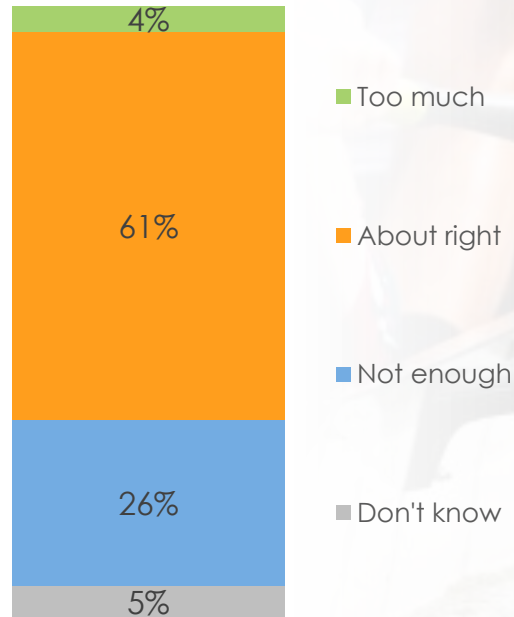
Majority of university club members say that the balance between competitive and recreational rowing is about right



Q21. How would you describe the balance of recreational vs competitive rowing at your club? Base: Those who are a member of the University rowing club. Excluding NS (96)

Six in ten say the support offered is about right

A quarter say that there is not enough support for people with different motivations though

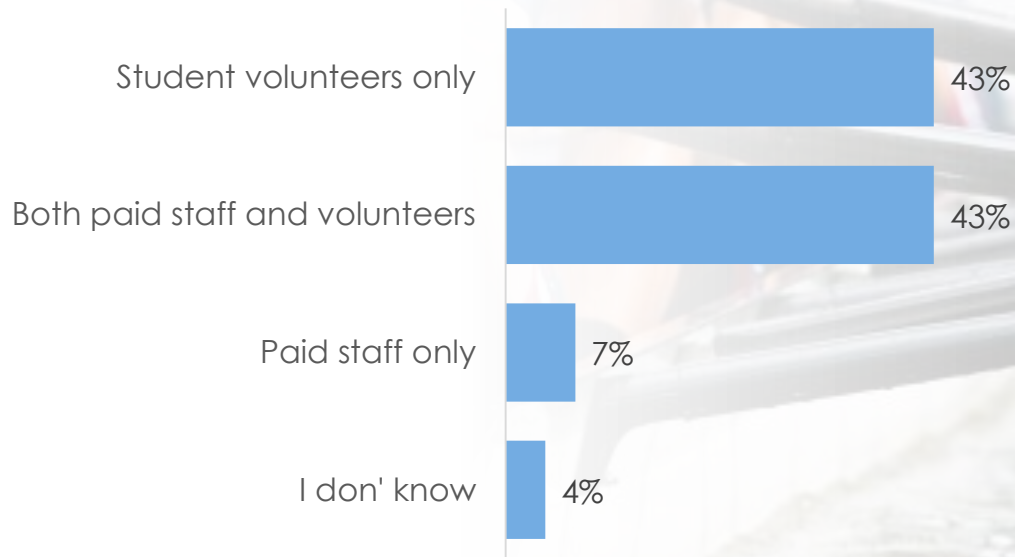


- Too much
- About right
- Not enough
- Don't know

Q20. How would you describe the level of support for people with different motivations within your club? Base: Those who are a member of the University rowing club. Excluding NS (96)

University rowing clubs heavily reliant on volunteers

43% staffed by volunteers only and a further 43% by a mix of paid staff and volunteers



Q18. How is your university rowing club staffed? Base: Those who are a member of the University rowing club. Excluding NS (96)



Increasing participation in
rowing

Currently, rowing is not on the radar of most students



When asked to think about it, most feel it is 'not for me'

"It's not like football where you can be on the social team. The equipment is so expensive, **you either commit or you don't - there's no middle ground**"

Female, UWE

"The downside is it's mornings and every evening. That's **such a big commitment**. I don't know why you'd choose to do it"

Male, Bath

"There's a perception of it being **elitist**. I'd never consider doing it because you expect all the people there to be 6'4 and clad head to toe in Jack Wills. That's just not me"

Male, Nottingham



Rowers know how they are perceived



And they revel in it, to an extent

Image

- They like being seen as rowers – there is a certain kudos / gravitas attached to the label
- They understand that many see them as a bit mad for getting up at 5am and working themselves to the point of exhaustion – but that adds to the mystique

"Being a rower makes you feel special – people look at you in a certain way, which is pretty cool"

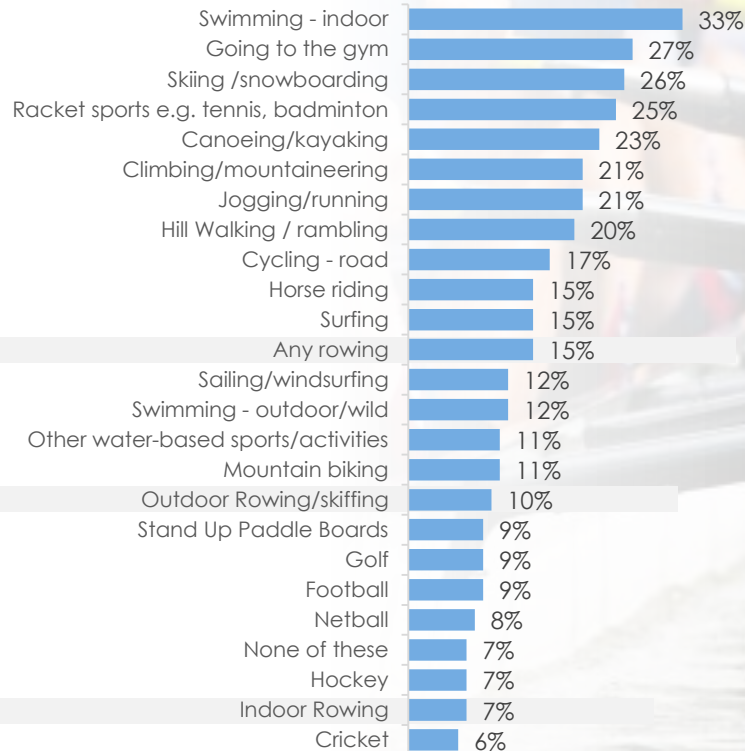
Performance Driven

- They find it very difficult to look beyond competition
- Whilst they see the opening up of the sport via recreational participation to be a good thing, they do not necessarily see a place for this within the club-based system
- They feel it would detract time, resources and funding away from those who have the potential to succeed and win

"We do like to punish ourselves, we are really driven – that's what it takes to succeed as a rower. It's one of the few sports where you are guaranteed to improve so long as you put the work in, which I think is a major selling point. Talent doesn't really come into it"

One in ten would be interested in outdoor rowing in the future

10% of students say they may be interested in on water rowing at some point in the future and 7% indoor rowing



15% say that they might be interested in taking part in any form of rowing activity in the future – there are no significant differences by gender or year at University

Q8. Which, if any of the following sports, exercise or physical activity might you be interested in at some time in the future? Base: All respondents (online only) Excluding NS (1012)

There are three key barriers to rowing participation for non-rowers



Cultural

Many perceive rowing to be elitist and for 'posh' kids only. This stems from the Boat Race and from the fact that it's only public schools that offer it at a pre-university level

Performance

Rowing is seen as one of the most performance driven of any sport. A belief that unless you're aiming to compete, then there is little point in taking it up. It's not seen as 'fun'

Logistical

Many students cited logistical barriers to participation and the number of hoops to jump through just to get out on the water. It's not like football where you can just pick up a ball

Boat race associations can alienate students before they've even considered rowing as beginners



Cultural

Many perceive rowing to be elitist and for 'posh' kids only. This stems from the Boat Race and from the fact that it's only public schools that offer it at a pre-university level

Not inclusive

- A feeling that rowing is a bit of a closed society – that students from less privileged backgrounds may not be welcome

*"The people who row at university did it at school, so are already good. I think the **private schools** offer it sometimes"*

*"It's quite a **posh sport** isn't it? At least everyone who does it seems to be posh"*

*"It has a bit of a reputation doesn't it, rowing – it's **for people who drink Pimms**, not lager, so I'm not sure I'd fit in"*

There is a strong need to make rowing more inclusive. Really, this needs to start at a pre-university level, but university clubs can also play a role by introducing propositions with more universal appeal

Rowing's performance driven image can make it feel very inaccessible for beginners



Performance

Rowing is seen as one of the most performance driven of any sport. A belief that unless you're aiming to compete, then there is little point in taking it up. It's not seen as 'fun'

Competitive

- Rowing is not seen as a sport that can be taken up on a casual basis – the focus isn't on learning a skill, or enjoying the activity. It is felt to be very outcome based

Physical requirements

- Rowing is felt to be a very demanding sport – leading to an assumption that you have to be physically fit to even think about learning
- Image of a certain 'body type' – people think you need to be tall and strong to be good at rowing

*"I saw people on the lake and I was like, 'Oh my God, that looks like so much fun. But also **really hard work**'"*

*"I'm too little. You do view it as a sport where they are like massive with **massive muscles**"*

*"You don't just casually 'row'. **It's always a race. It's all or nothing**"*

A need for rowing clubs to challenge this perception and promote rowing as a fun activity, with a range of fitness / social benefits regardless of whether students are interested in taking part competitively

Students don't want to go out of their way to commit to something they're not sure they'll be good at or enjoy



Logistical

Many students cited logistical barriers to participation and the number of hoops to jump through just to get out on the water. It's not like football where you can just pick up a ball

Time & Accessibility

- The 'infamous' 7/8am starts, and regular training (3-4 times a week) is a daunting prospect for most
- Club houses and rivers are not always near student accommodation, making them difficult to get to

Cost

- It is generally quite expensive to join a sports club at university and there is a perception that rowing could be even more expensive because of the equipment involved

*"I tried rowing once, but **the hours they train are insane** and it was **quite a trek to get to it**, because it was on the river"*

*"It's not like it's accessible. **You can't just grab a boat and get on your local pond**"*

*"**The equipment's so expensive**, you either commit or you don't, there's no middle ground"*

There is a clear opportunity to whet students' appetites with strong land based propositions, so that they feel confident / engaged enough to then commit to water based rowing

For lapsed rowers, the same logistical issues apply. Other reasons for lapsing include...



Club atmosphere

- The club atmosphere for some is too competitive or just not the same as their home clubs which makes it less appealing

No suitable team

- A feeling that if you don't want to train competitively, you get 'lumped' with the novices which isn't challenging enough. As such, they end up falling through the cracks...

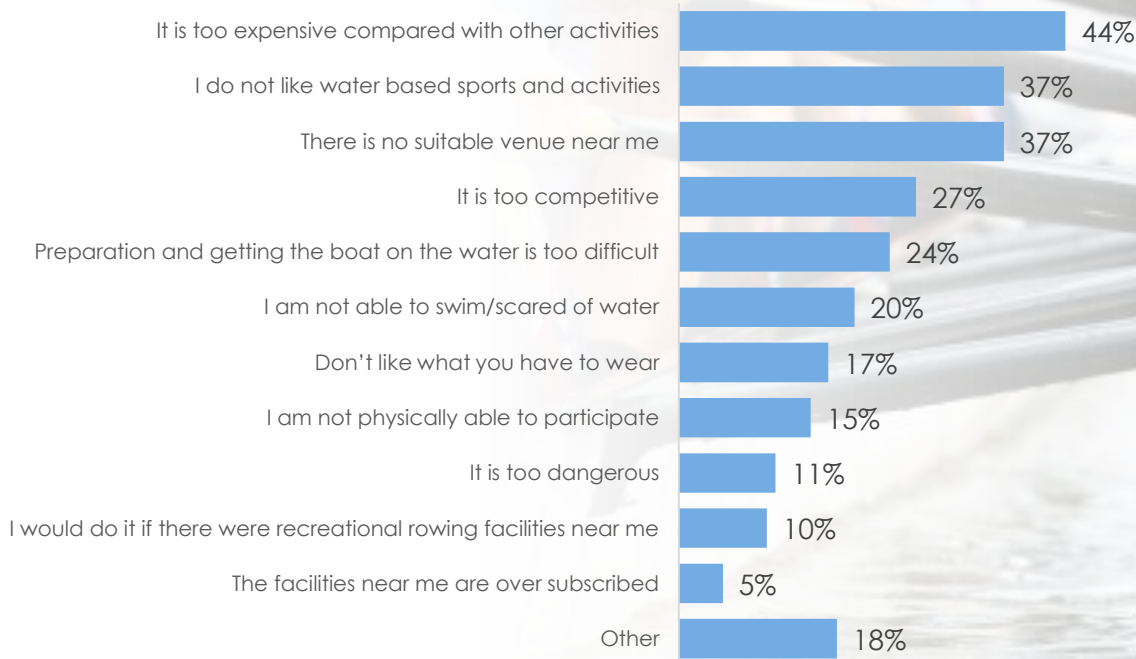
"I wanted to row with a team, but just for fun. It became clear that I couldn't do that, so instead I ended up training with the novices for a while until I stopped!"
Female, Bath

"It just wasn't as friendly as my club at home"
Female, UWE

"It was a lot more expensive than my club at home, with the insurance and travel costs"
Female, UWE

Main reason for lack of interest is perceived expense

Dislike of water based activities and lack of suitable venues also cited as key reasons for not participating in rowing

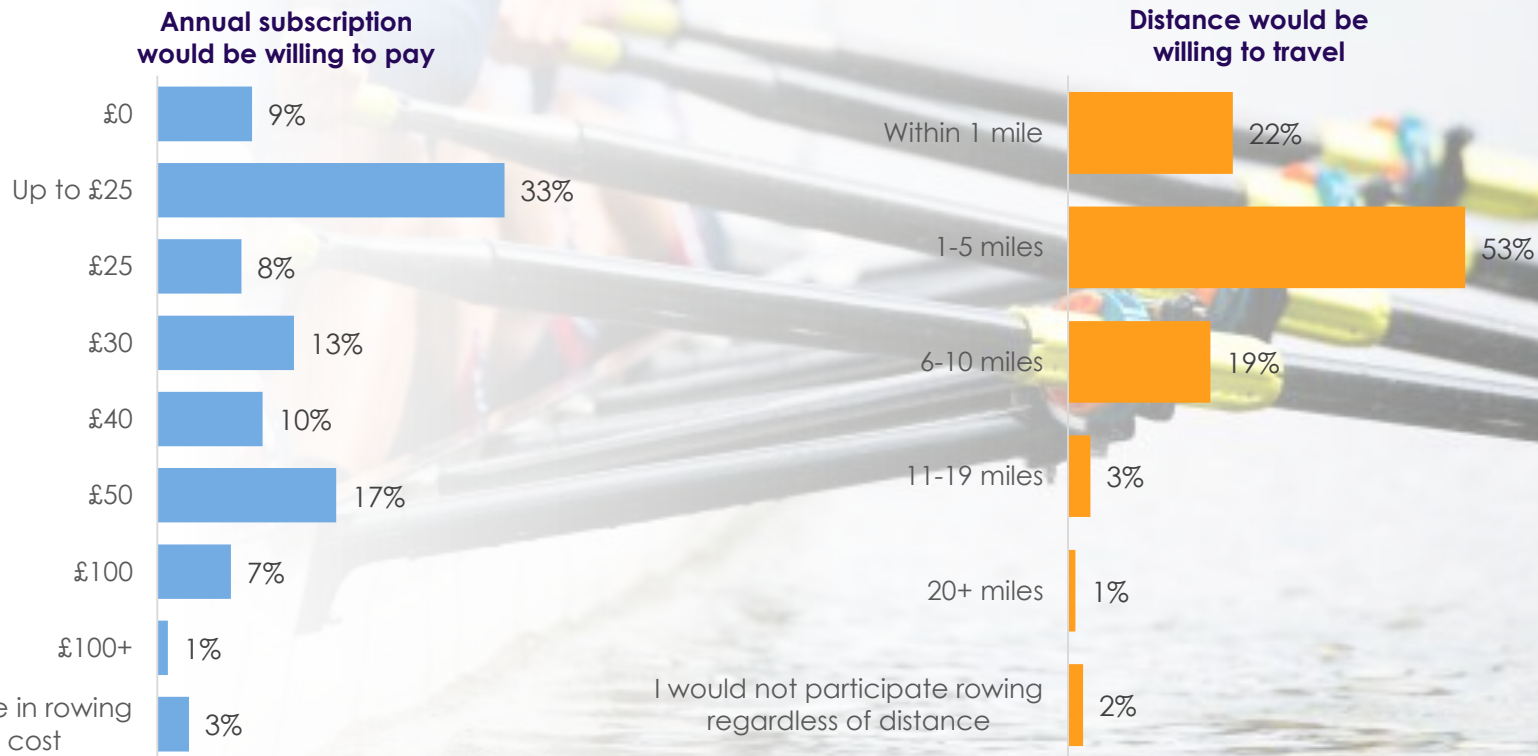


First year students are the most likely to say that it is too competitive (34% compared to 19% of those in their second year onwards)

Top 3 reasons for not considering participating in rowing

90% not willing to pay more than £50 per year

Students are not willing to pay high annual subscriptions or travel too far to participate

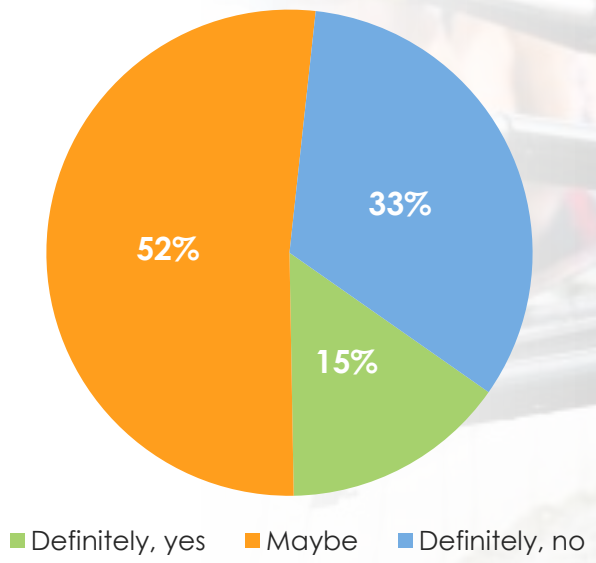


Q17c. Roughly how much annual subscription would you be prepared to pay to participate in rowing? Q17d. How far would you be willing to travel to participate in rowing? Base: Those who would definitely/maybe consider rowing. Excluding NS (678)



If the barriers are addressed, then 15% say they would definitely be interested in rowing

A further 52% would maybe be interested in rowing at some point in the future



There are no significant differences by gender or year at University

Q17a. If the reasons you do not currently participate more in physical activity or exercise were addressed, would you consider rowing or start to row more? Base: All respondents (online only). Excluding NS (1012)

Currently, associations with rowing are purely water based



There is a clear need to leverage land based rowing as a way into water based rowing...

Water based rowing is more interesting overall

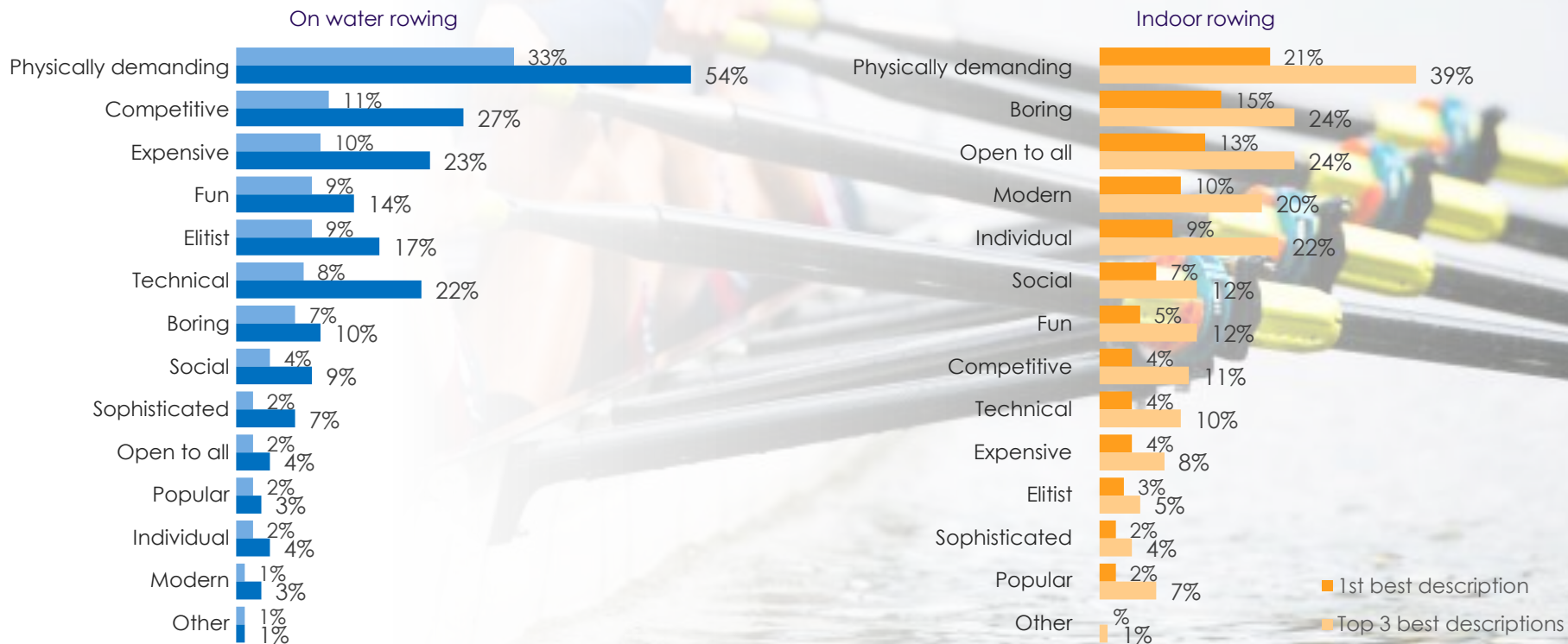
- Positively, a skill people would be interested to learn as it's very different from other sports
- An excuse to get outside (fresh air!) and get on the water
- Negatively, the cold is a concern for some (especially during the winter months)
- Fear of capsizing too (whilst not a issue for all, definitely is an off putting prospect of on water rowing for a few)

Land based rowing is currently very narrowly defined

- Most are aware / have seen erg machines – but they don't associate these with rowing per se, they are purely seen as a workout / fitness tool
- It's certainly not everyone's favourite piece of equipment in the gym – it's pretty brutal!
- But appeal could be improved through the development of propositions that inject some fun into erg usage

A joined up approach will be far more effective than any individual water or land based proposition in overcoming barriers and driving overall engagement with rowing as a sport

Indoor and on water rowing are perceived very differently



Q29a. Here is a list of descriptor words – which three do you think best describes rowing on water? Q29b. Here is a list of descriptor words – which three do you think best describes indoor rowing? Base: All respondents Excluding NS (1012)

High levels of interest in new rowing concepts

For all of the concepts other than 'competitive rowing' at least a third say they might be interested in participating

Learn to row programmes - for beginners using stable boats: Learning to row in a wider more 'stable' boat instead of the current racing equipment

NET code 4-5



Rowing tours - on waterways such as rivers, lakes, canals or the sea: Once you have learnt in a stable or other boat use the opportunity to get out in the 'Blue Gym'. This could involve using waterways such as rivers, lakes, canals or the sea. It can be a great way to overcome stress in daily life.



Social competitions - for different groups of beginner rowers: This would involve beginners setting up a BBQ or similar outdoor event a short distance away and racing others who learnt in a stable boat to the event. It should be totally fun with the possibility to invite other local universities to use your equipment to save expense and hassle.



Rowing for Fitness: The opportunity to row with racing equipment with a focus on improving fitness rather than just competition.



Competitive Rowing: The opportunity to row with racing equipment with a focus on competition, either within the university, or against other universities.



Q27. How interested would you be in participating in the following on-water rowing activities? Please rate on a scale of 1 to 5 where 1 is not at all interested and 5 is very interested. Base: All respondents (online only). Bas : All respondents (online only). Excluding NS (1012)

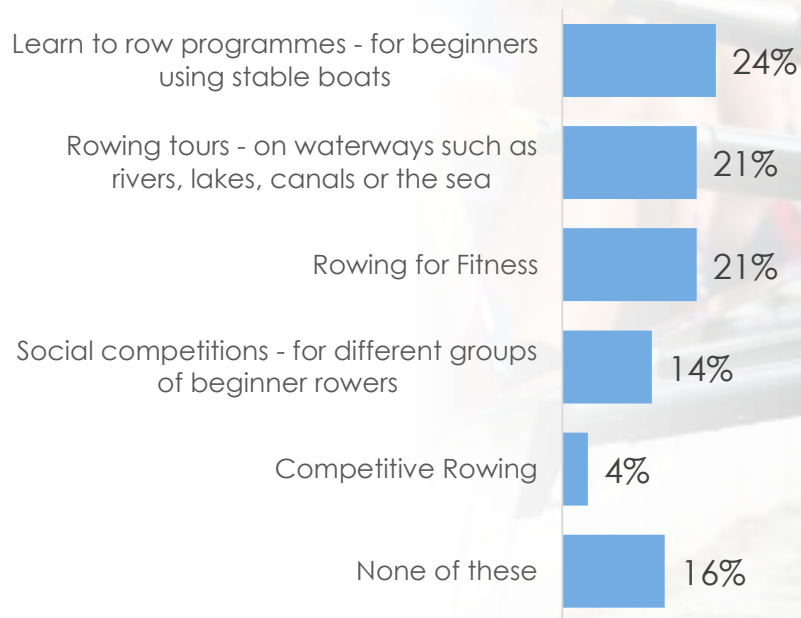
Differences in interest by gender

	Men NET code 4-5	Women NET code 4-5
Learn to row programmes - for beginners using stable boats: Learning to row in a wider more 'stable' boat instead of the current racing equipment	37%	43%
Rowing tours - on waterways such as rivers, lakes, canals or the sea: Once you have learnt in a stable or other boat use the opportunity to get out in the 'Blue Gym'. This could involve using waterways such as rivers, lakes, canals or the sea. It can be a great way to overcome stress in daily life.	35%	37%
Social competitions - for different groups of beginner rowers: This would involve beginners setting up a BBQ or similar outdoor event a short distance away and racing others who learnt in a stable boat to the event. It should be totally fun with the possibility to invite other local universities to use your equipment to save expense and hassle.	33%	39%
Rowing for Fitness: The opportunity to row with racing equipment with a focus on improving fitness rather than just competition.	36%	35%
Competitive Rowing: The opportunity to row with racing equipment with a focus on competition, either within the university, or against other universities.	23%	13%

Q27. How interested would you be in participating in the following on-water rowing activities? Please rate on a scale of 1 to 5 where 1 is not at all interested and 5 is very interested. Base: All respondents (online only). Bas : All respondents (online only). Excluding NS (1012)

Learn to row programmes are most likely to encourage participation in outdoor rowing

It is the more social and less competitive concepts which are most likely to increase participation



Q28. If available, which activity would be most likely to encourage you to participate (more) in outdoor rowing? Base: All respondents (online only). Excluding NS (1012)

On water propositions have some appeal – but on their own fail to directly address ‘logistical’ barriers to participation



On the water

Explore series –
BBQ with
rowing

A very popular idea, as it directly addresses the sense that rowing is not seen as a fun / recreational activity



“I really like this idea, it would make it more of a social event, so wouldn't matter if you were bad”

Explore
Rowing –
Learn to Row

A definite sense that these should be on offer, particularly for those with some fear of the water. However, there is some doubt on the overall impact this will have on driving initial engagement with rowing as a sport

Explore
Touring

Another popular idea, but more for experienced rowers. It doesn't address any of the immediate barriers students have

“Surely this would be expensive? Like having to get to all the different locations?”



High levels of interest in new indoor rowing concepts

Especially high interest in more social indoor rowing

Film-night Rowing: The concept is simple, put a movie on a big screen, turn down the lights, turn up the volume and row. Participants can take part at their own individual intensity and for their preferred duration.

Group Rowing Training: This instructor led activity is very similar to a spinning/group cycling class but uses a rowing machine instead of a bike. An instructor leads a session around a group of indoor rowing machines where participants are encouraged to vary the intensity and duration of activity and can be rowing or part of a wider class on the gym floor using other equipment.

Intra-mural Rowing: Teams of rowers represent their Facility or Hall of Residence. During the event rowing machines are linked together and the races displayed on a screen helping spectators and competitors to get involved. Teams can be mixed sex, mixed age and mixed ability.

Online Rowing Leagues: Row either by yourself or with others then upload your stats online to see leader boards and compare your performance against friends or rowers around the world.

Inter-sport Rowing: A competition so the teams are not just made up from boat clubs but any sport club. This can work as an intra-sport or inter-university event.

Online Rowing Competitions: Rowing machines can be linked to the internet with individuals (or teams) training or racing anybody anywhere else in the world (or the next uni).

NET code 4-5



Q25. The following are some activities that may make rowing more interesting for some people. How interested would you be in participating in the following **indoor rowing activities**? Please rate on a scale of 1 to 5 where 1 is not at all interested and 5 is very interested. Base: All respondents (online only). Excluding NS (1020)

Differences in interest by gender

Film-night Rowing: The concept is simple, put a movie on a big screen, turn down the lights, turn up the volume and row. Participants can take part at their own individual intensity and for their preferred duration.

Group Rowing Training: This instructor led activity is very similar to a spinning/group cycling class but uses a rowing machine instead of a bike. An instructor leads a session around a group of indoor rowing machines where participants are encouraged to vary the intensity and duration of activity and can be rowing or part of a wider class on the gym floor using other equipment.

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Men
NET code 4-5

Women
NET code 4-5

37%

54%

27%

39%

28%

22%

25%

16%

28%

19%

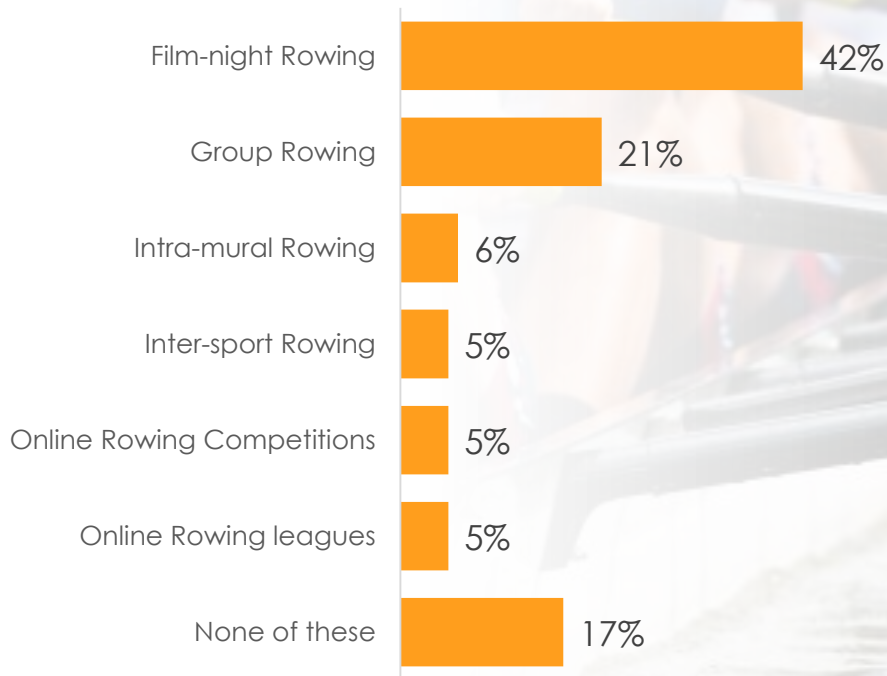
25%

22%

Q25. The following are some activities that may make rowing more interesting for some people. How interested would you be in participating in the following **indoor rowing activities**? Please rate on a scale of 1 to 5 where 1 is not at all interested and 5 is very interested. Base: All respondents (online only). Excluding NS (1020)

Film-night rowing is the most popular concept

Rowing concepts with a social element are the most likely to encourage participation in indoor rowing



Q26. If available, which activity would be most likely to encourage you to participate (more) in indoor rowing? Base: All respondents (online only). Excluding NS (1012)

Land based rowing has the potential to bring new students into the sport



To maximise impact, clear routes to on water rowing need to be mapped out for those expressing a keen interest

Land based rowing

Group rowing / spinning

A very popular idea – makes rowing feel fun / cooler / more inclusive. Turns it into a work-out rather than just a sport

Film Night Rowing

Potentially an interesting idea; however, few could see themselves rowing for the entire duration of a film and many said they'd probably be too busy watching the screen to concentrate on technique!

Go row online

The competitive aspect of this wasn't overly appealing, but many liked the idea of being able to track progress / achievement, equating it with apps / activity trackers such as Fitbit, Nike+ or Strava

Inter-sport rowing

An interesting idea for those who are already sporty / members of other clubs, but this isn't felt to be targeting the average university student

Inter-mural rowing

This is felt to be aimed at making rowing more exciting for those that already row. There doesn't seem to be a beginners angle here, from what students could tell at least



"I could really see this as something I would do if it was offered as a class at the gym"

"I like the idea of a film night, but I wouldn't be able to row for an entire film!"



Addresses performance barriers



Addresses logistical barriers



Addresses cultural barriers



Conclusions and recommendations

Key Insights – A Reminder



- Perceptions of university sport differ across institutions – but generally, club-based participation is felt to be too performance driven, which can feel off-putting to recreational users
- This is especially important as our research highlights that competition is not a key motivation for the vast majority of students who take part in sport, exercise or physical activity



- The particular issue for rowing is that there is currently no opportunity to take part recreationally (be it inside or outside of a club environment)
- There is, however, scope for increasing participation and lots of interest in social and less competitive rowing concepts (such as Film Night Rowing) which are most likely to increase participation

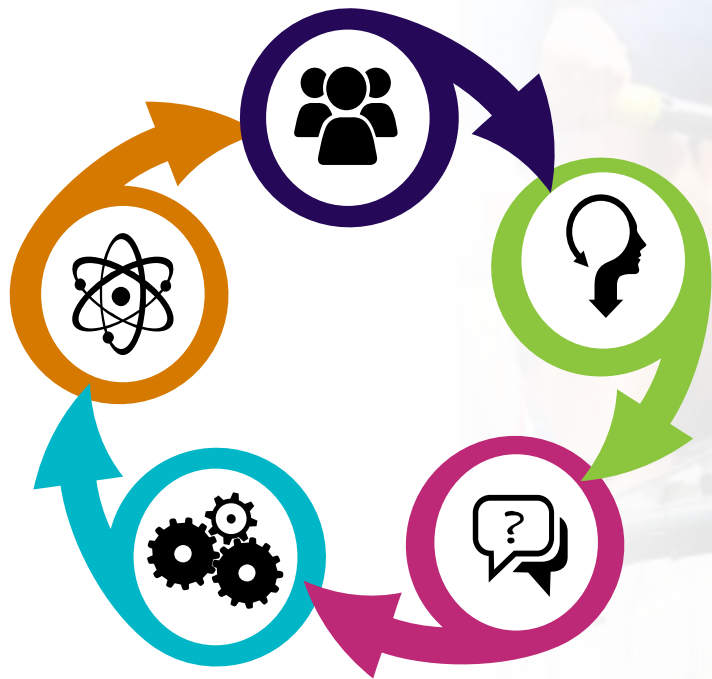


- There are a number of barriers to participation in rowing. Logistical barriers and performance barriers dominate - a third barrier around 'culture' is less tangible and more difficult to directly address through specific initiatives
- On the water rowing is seen as physically demanding, competitive and expensive while indoor rowing is viewed as physically demanding and boring (though more accessible). New concepts and communications need to address these perceptions head on



- There are distinct differences in motivations/barriers and attitudes towards sport among indoor and outdoor rowers (and those potentially interested in either)
- However, despite this, there is a clear opportunity to leverage land based rowing as a way into water based rowing – a joined up approach will be far more effective than any individual water or land based proposition in driving overall engagement with rowing as a sport

Our Recommendations



Challenge perceptions of indoor rowing as being 'boring'

Initiatives such as 'Film Night Rowing' and 'Group Rowing / Spinning' repositions indoor rowing as a group based activity that is fun as well as being a great workout

On water rowing needs to be about more than competition and performance

Key to driving appeal is ensuring rowing clubs have an offer that appeals to all – Explore Tours and BBQ socials will help drive interest amongst recreational participants

Addressing logistical / accessibility barriers is key

Obviously university clubs can't magic up new equipment and facilities, but taster sessions throughout the year will help challenge perceptions that if you've missed out at fresher's fair your chance has gone

Create a clear pathway for new entrants into the sport

Leverage the comparative lack of accessibility barriers to indoor rowing, by creating a route of progression for those who wish to move into on water rowing

Look beyond universities to maximise your chances for success

University rowing can't be seen in isolation – local rowing clubs and schools also have a part to play in building a more inclusive image for the sport – that way more students will enter university with an awareness and understanding of what rowing is all about

future thinking

Main Contacts

Andrew Williams, Research Director
Andrew.williams@futurethinking.com

Simon Driver, Associate Director
Simon.driver@futurethinking.com

+44(0) 207 843 9777

