



Bowls New South Wales

Research Report: Qualitative and Quantitative findings regarding the Registered Player and Club Manager satisfaction study

January 2016

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1. Executive Summary

Overview of approach

The target audience of the study comprised Registered Players and Club Managers (latter defined as decision makers in elected or office bearing positions). The project comprised both qualitative and quantitative components. Four group discussions were held with Players and 12 in-depth interviews were conducted amongst Managers. For the quantitative surveys, a total of n=817 telephone interviews were completed, n=605 amongst Players and n=212 amongst Managers, all drawn from a mix of locations and Club sizes.

Key findings

Below we summarise the key findings from all stages of the research:

Behaviours

Over a quarter of those surveyed had been playing bowls for more than 20 years, compared with 10% who had commenced play within the last 2 years. Just over half play regularly (at least 2-3 times per week) and almost a third play at least weekly. Social play was consistently high across all whereas competition play was highest amongst those aged under 50 years. A fifth of the sample classed themselves as social only players.

Primary pathways into bowls emerged as introduction by their father, taking it up as an alternative or transition away from other more physically demanding sports, or to a lesser degree, due to attendance of a social, corporate or other related fun event.

Imagery and motivators surrounding the game

The game conjures up many positive associations. These centre on the positive environment and include the friendship, camaraderie, fun and positive impact on health and wellbeing. The game engages them on many levels and especially the element of competition, the challenge and skill, the need for teamwork and its aspirational value – anyone can succeed! Consequently, there is extremely high advocacy regarding the game, and a great opportunity for BowlsNSW to capitalise on this passion and pride and use it to promote the game.

There are however, still some lingering negative preconceptions and connotations surrounding the game, with many believing it is viewed by others as slow, boring and limited to 'old men'. This has acted as a detractor in the past, with current members admitting to not initially considering the game because they never saw themselves as quite 'old enough'.

"It's open to anyone – age, gender and size. You can have a go and get to any level... you can play against Australia's best. You can reach for anything. Can have different aspirations." – Registered Player

Understanding of annual membership fee allocation and value perception of registration

Membership fees ranged widely, but with the majority paying between \$60 to \$100 per annum. Most consider themselves aware of the registration fee allocation process onto (District/ Zone and State), and Managers significantly more so than Players. Although not considered expensive, especially relative to other sports, Managers in particular are unlikely to consider it value for money. The words 'lack of support' were often used in describing what was driving this discontent, illustrating a need to clarify the process, amount and demonstrate the associated benefits in more tangible or visible ways.

Overall experience and evaluation at Club level

Extremely high satisfaction was expressed on a Club level. Suggestions for improvement involved primarily expanding membership, followed by making it more inclusive, improving greens and better Club management.

Current communications and preferences

Future preferences aligned roughly with existing modes of communication adopted by Clubs. Almost two thirds of Players and Managers opted to remain with the Club notice board as the primary form of communications, regarding both fixtures and general news (and driven by older members). This was followed by email (by around two fifths, and driven by younger members). Announcements were only preferred by a quarter, and SMS and electronic magazines were least favoured (by around a tenth).

Understanding of role and function of BowlsNSW

The role and function of the State Body is probably not as clear as it should or could be – especially amongst Players (59% stated understanding). As such, many found it hard to attribute any personal benefit from the association. Managers, although more knowledgeable in this regard (78% stated understanding) were more critical of BowlsNSW. They were significantly less likely to agree with descriptors of it comprising 'knowledgeable experts'. Negativity was fuelled by perceptions of focus on high grade and elite Players and the lack of support for small and/or regional Clubs. There is a clear need to work on clarifying, increasing and improving the organisations profile.

"We need to make use of all paid employees, their knowledge and know-how to come to Clubs and help out any way they can."

- Registered Player

District/ Zone performance

Understanding and evaluation of their District/ Zone was generally favourable. Dissatisfaction was however, at higher levels than observed for Clubs. Primary criticisms were regarding the sharing of and filtering down of information from representatives.

Challenges and detractors

Challenges faced by Club Managers are primarily membership based – attracting new members or balancing the needs of existing members. Amongst Players, dislikes of the game are minimal. There is however, a small subset of Detractors, primarily amongst older, social only Players in smaller Clubs, who are most negative toward the game and management of the sport. They are feeling ignored, disempowered and although paying the same fee structure, gaining the least value.

Future focus and priorities

Most are conscious of the stagnant or declining registered Player base and need for action. Many do however, feel powerless and are wanting more professional support and advice to help promote their Club and attract new members. The smaller Clubs in particular, feel that the State Body needs to take (or be seen to take) a more active role promoting the sport, be it through national TV advertising/ airtime or assisting with promotion at a Club level (e.g. in the form of upskilling staff and volunteers to improve promotional tools and initiatives like website, Facebook etc.) and how to better manage and run a Club.

In terms of targeting future Players, although most suggested targeting youth to develop the interest early, there was general consensus that approaching the 35-50 year age category would prove more fruitful. Especially those engaged in other, more vigorous sports. Focus on those who have a love for sport and competition, and at the same time, have a higher disposable income. Other suggestions included greater mentorship and increased flexibility, for example shorter games, to entice younger/ time poor audiences – but without tampering too heavily with the existing structure.

“It’s slowly dying, like the bowlers. There’s less and less people. They put up the prices because there’s less revenue coming in. As they pass away they’re not coming in from the bottom to take their place, younger ones.”

– Registered Player

2. Introduction

BowlsNSW comprises 525 bowling Clubs, spread across 5 metro and 11 country Zones, and comprising approximately 40,000 registered Players.

In line with national trends, registered membership of bowls Clubs has been steadily decreasing at a rate of around 3% over the past 30 years. However, in more recent years this decrease in registered Players has accelerated to around 5%. Conversely, there has been steady increase in casual bowls, although this is more pronounced in metro areas.

BowlsNSW already has the demographic profile of Players and some understanding of the markets underlying rational needs and motivations (given the annual Census from Bowls Australia and 2006 'Building Participation Research'). However, this viewpoint was incomplete and needed to be updated. Research was therefore commissioned to supplement this with a comprehensive examination of BowlsNSW assets and experiences, and how they are perceived by key target audiences:

Club Managers

Exploring and measuring issues, perceptions and challenges from their perspective

- What are the **greatest opportunities and issues** facing BowlsNSW Clubs and how do we address these?
- What are the **perceptions and challenges** for both regional and metro Zones?

Registered Players

Overall understanding of dynamics: Are BowlsNSW doing the right thing, what can be done better, how to sharpen the focus?

- How do we better **understand the needs** of current registered Players?
- How do we create an experience to **meet the needs** of registered Players and create advocacy?

Findings will be used to feed into the Boards strategic planning session, and to help create a foundational framework that provides a common language for product development, marketing and messaging - to better target, communicate with, attract and retain registered Players.

3. Methodology and sample

UMR conducted both qualitative and quantitative research amongst both key audience groups as follows:

<p>Club Managers</p> <p><u>Qualitative:</u> 12 x In-depth interviews</p> <p><u>Quantitative:</u> n=212 CATI/ telephone surveys</p>	<p>Registered Players</p> <p><u>Qualitative:</u> 4x Focus groups</p> <p><u>Quantitative:</u> n=605 CATI/ telephone surveys</p>
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For the Registered Player Groups:

- Four distinct locations were agreed in consultation with BowlsNSW, in order to ensure the breadth of both metro and regional input as well as positive and negative opinion. Similarly, each group comprised a mix of ages, type and levels of Player. Sydney group respondents ranged in age from 41 to 75 years. Orange respondents ranged in age from 27 to 68 years. Shoalhaven respondents were aged 50 to 78 years, and those in Newcastle were aged 19 to 64 years.
- Groups were conducted in centrally located venues, with respondents recruited from a range of bowling Clubs within the catchment area. Each group lasted for 1½ hours and comprised of 7-8 respondents.

For the Club Manager in-depth interviews:

- Each depth interview was of between 45 and 60 minutes duration.
- Respondents were randomly selected, but ensuring a mix across location (metro vs regional), size (small, medium and large Clubs) and position held (e.g. president, chairman, operations Manager, bowls coordinator).
- Seven depths were conducted in person and on-site across a range of bowling Clubs located in Sydney, Orange, Shoalhaven and Newcastle, and the balance were conducted by telephone across a random selection of NSW Districts and Zones.

The bulk of qualitative fieldwork was completed between the 9th and 16th of December with findings used to inform development of the follow-on quantitative questionnaire.

For the Registered Player CATI surveys:

- A total of n=605 telephone interviews were completed.
- Sample was provided by BowlsNSW, comprising a database of approximately 40,000 contacts. After cleaning and deduping this reduced to 36,842. Contacts were dialed randomly, allowing a natural fall out in line with incidence. Soft quotas were imposed to ensure representation across all 16 Districts/ Zones, all age brackets and competition vs. social Players. See a sample breakdown overleaf.
- The average interview length for Players was approximately 15 minutes..

	Players	Sample		Completes		Sample		Completes
	Zones	#	%	%	Club Size	#	%	%
1	Far North Coast	2,223	6%	5%	Small	11,745	32	37
2	Newcastle	4,580	12%	13%	Medium	16,609	45	44
3	North West NSW	1,242	3%	5%	Large	8,488	23	19
4	Central & Far West NSW	977	3%	2%	TOTAL	36,842	100	
5	Nepean/Southern Tablelands	3,328	9%	9%	Age	#	%	
6	Hunter/Upper Hunter & Manning	2,705	7%	8%	18-29	823	2	6
7	South Coast	2,231	6%	7%	30-49	3,570	10	21
8	Riverina & South West NSW	2,164	6%	6%	50-69	14,097	38	38
9	N Sydney/Northern Beaches	2,429	7%	6%	70+	16,824	46	35
10	Sydney North West	2,193	6%	5%	unknown	1,528	4	
11	Sydney East & Inner	1,358	4%	4%	TOTAL	36,842	100	
12	Sydney South West	1,587	4%	4%	Grading	#	%	
13	Sydney South	1,769	5%	4%	1	1,419	4	8
14	Mid North Coast	2,477	7%	6%	2	1,696	5	8
15	Central Coast	3,017	8%	8%	3	2,384	6	6
16	Illawarra	2,562	7%	8%	4	3,207	9	13
	TOTAL	36,842	100	100	5	4,364	12	16
					6	6,542	18	21
					7	7,163	19	28
					None	26,775	73	
					TOTAL	36,842	100	

For the Club Manager CATI survey:

- A total of n=212 telephone interviews were completed
- UMR were provided with a list of all 525 Club names and telephone numbers. Clubs were called up randomly, and interviewers then asked to speak to the Club Manager or other elected or office bearing person who was on site at the time. Calls were made from 10am through to 8pm Monday through to Sunday.
- The average duration for the Manager survey was approximately 16 minutes.

All quantitative fieldwork was completed between the 20th of December 2015 and the 5th January 2016.

Additional notes regarding the data and report:

The quantitative data remains unweighted.

Findings are shown as percentage proportions. Due to rounding up, some totals may not add to 100%.

Significance testing of subgroups has been undertaken and commented on. The

Blue colour indicates that the numbers are significantly higher than total

Red colour indicates that the numbers are significantly lower than total

The maximum theoretical margin of error at the 95% confidence level is $\pm 3.4\%$.

This report summarises the findings from all stages of the research.



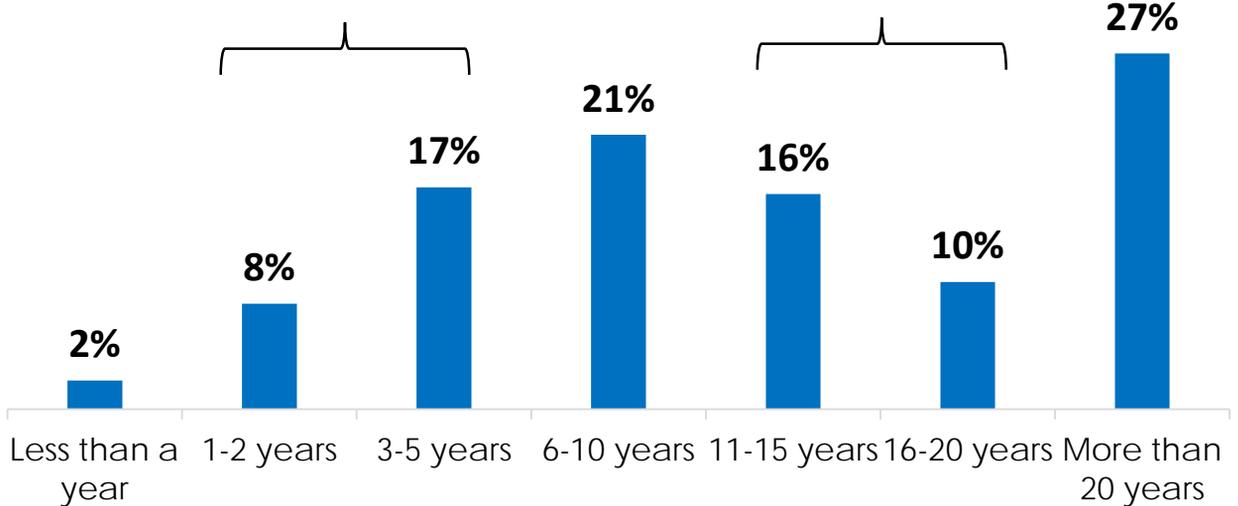
4. The Detailed Findings

4.1 Behaviours

Length and frequency of play

Within the quantitative sample, over a quarter (27%) of participants had been playing in excess of 20 years. A similar proportion have been playing 11-20 years (26%). And although a quarter (25%) appear to have started playing in the past 1-5 years, only 2% had started in the last year.

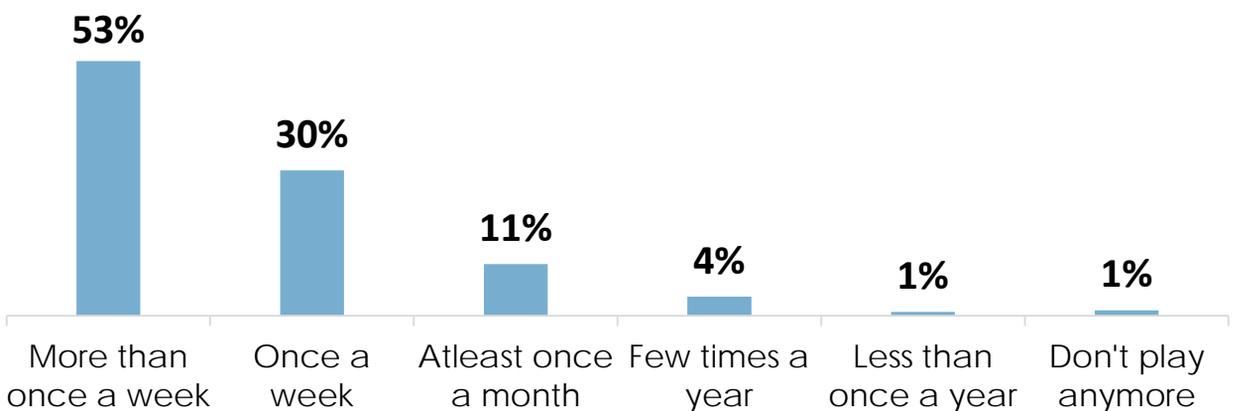
Players only: How long have you been playing bowls? (Base: n=605)



Most play regularly, with 52% playing 2-3 times per week, and 1% playing daily.

The Zone of Far North Coast emerged with the largest proportion of frequent (2-3 x p/w) Players. Frequency of play was further significantly higher amongst those aged 70+ years, who play competitively and who are of median grade level (5-6).

Players only: On average, how often do you play Lawn Bowls? (Base: n=605)



Level of play

The mix of play was dominated by social games, followed by Pennants and Club championships.

Social play was consistently high across all age groups whereas Club championships and all other forms of competition play were supported most by median and younger aged Players (i.e. those aged under 50 yrs).

Players only: Which of the following have you played in the past 12 months?
(n=605)

		18-29	30-49	50-69	70+
Socially	93%	83%	97%	92%	92%
Club championships	64%	77%	74%	68%	50%
State championships	17%	40%	22%	19%	8%
Australian championships	2%	3%	3%	2%	0%
Pennants	68%	83%	74%	71%	59%
Other competitions	31%	40%	45%	30%	22%
Don't play anymore	1%	0%	1%	2%	2%

The higher the grading, more often competitive play was undertaken, with those graded 1-4 significantly more likely to play Club (80%) and state championships (37%).

20% of participants emerged as social only Players. On probing reasons for preference within the qualitative, some admitted to avoiding social play and vice versa. Those who only played socially were usually limited physically, so would only step-in when requested/ required to replace a 'no show'. A few no longer enjoyed the competitive environment.

Route to membership

All qualitative focus groups comprised a mix of relatively recent joiners as well as long standing members. This ranged in line with age – the most recent being 18 months and the longest of 40 years, and everything in-between. All were probed regarding their introduction and subsequent conversion to the game.

Four primary pathways emerged:

- Amongst the older generation many had been **introduced to the game by their father or grandfather**
- Many median aged Players had adopted bowls as a less strenuous, but equally competitive and skill based, **alternative to their current sport** (such as rugby, footie, golf).
- **Social introduction** via barefoot bowls or other corporate or fun event
- **Local/ drive by** - went for drink, as in area and liked the Club/ atmosphere

Other, less frequent mentions included Direct mail, or revisited after school

How did you get introduced to the game? (4x groups)

"The first time I played bowls was at a family friends 30th or something like that. That's how I was introduced to it. Then I played through uni games. They sponsored our cricket team so a few of the boys signed up. It's pretty well a natural progression... Club sponsors either cricket or football or something like that. The guys all come to the Club and then as they get older they gravitate to bowls."

- Registered Player

Alternate sport

"It's a nice way to ease into it, amongst the younger ones who are still competitive."

- Registered Player

Social intro

"I was never really a bowler, but because of where the bowling Club is, the board riders used to meet there and drink there from when I was 18, and just eventually one day someone said 'come and have a game of bowls' about three years ago and yeah, it was good fun, enjoyed it. Just kept playing, usually just in the gala days and stuff"

- Registered Player

"I couldn't finish golf, so someone suggested bowls"

- Registered Player

Club atmosphere

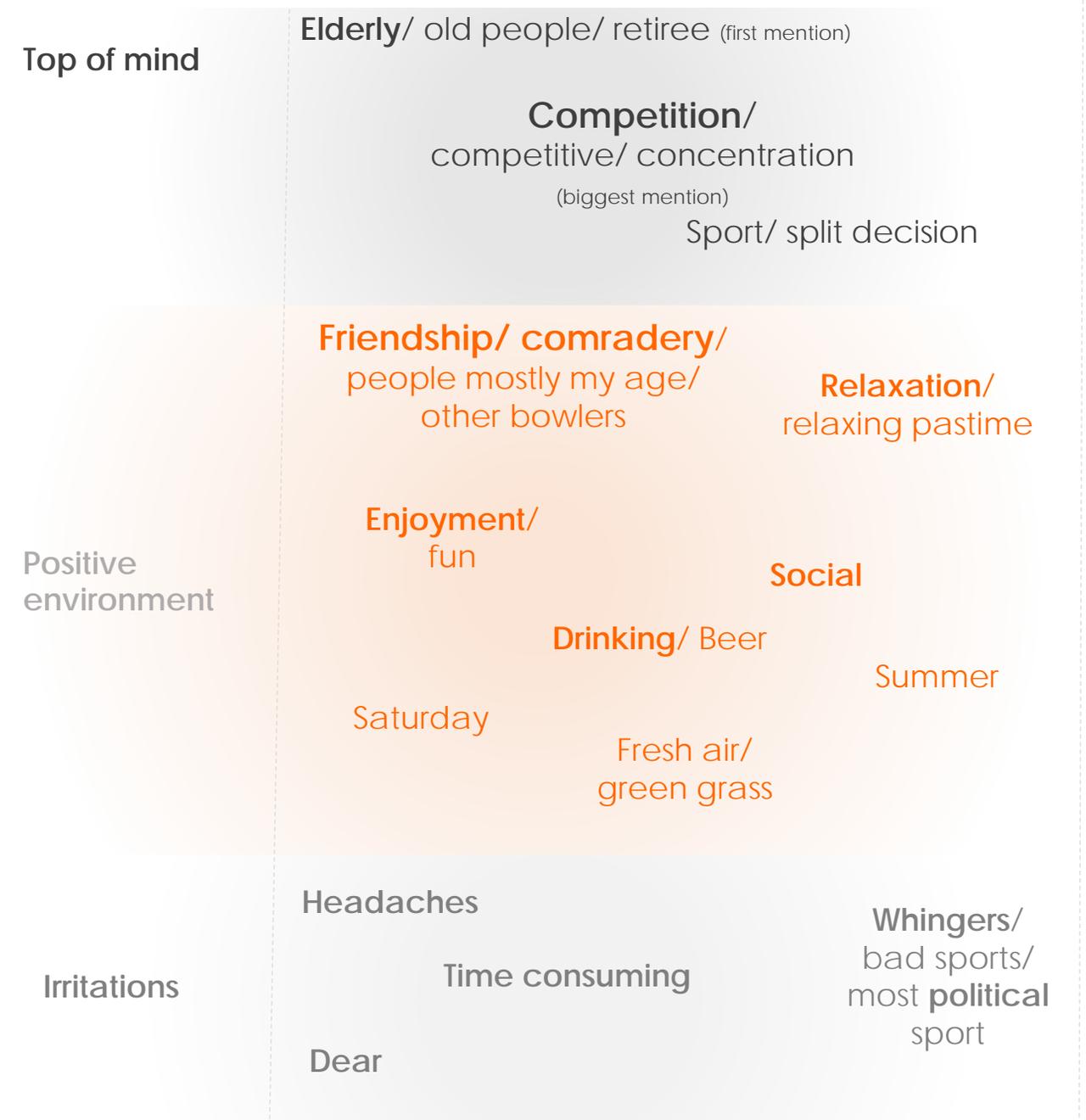
"I went to the Club and I liked the Club and I decided to be a bowler. I made some friends and it was a good atmosphere. They were looking for Players."

- Registered Player

4.2 Imagery and motivators surrounding the game

Word Association

In the focus groups, respondents were asked to list *the first thing that comes to mind when hearing the words 'Lawn Bowls'*? This diagram reflects the items respondents mentioned both in terms of order and frequency. The most salient mentions revolved around the positive environment it offered. Although references to age were most commonly mentioned first, this was outweighed by the number of mentions of competition.



“There once used to be that it was an old person’s game and a lot of younger people didn’t want to have anything to do with it whatsoever. That’s changed. Changed pretty dramatically actually. So that stigma is no longer there.”

– Registered Player

Motivators

Salient issues were reinforced in the quantitative, with half the sample quoting the welcoming environment as a prime reason for partaking in the game.

Players only: What is the main reason you enjoy and choose to play bowls?
(n=605)

Welcoming
Atmosphere
50%

"A great social outlet and a very good environment."

"It is a great game; it is a friendly game: meet a lot of good blokes."

"People and a couple of beers and good fun."

Health &
Wellbeing
31%

"Gets me out of the house, in the sunshine and exercising."

"Fitness, and knee and ankle problems are accommodated."

Camaraderie &
Team sport
17%

"Being part of a team is why I like to play lawn bowls and it is a constant challenge."

"Fellowship with the other people in it."

Individual ability
15%

"Because I can play it well rather than other sports."

"I think it is a wonderful sport, particularly as you get on in age."

Competition
14%

"Enjoyable and competitive game."

"I enjoy being competitive with other people."

Aspirational &
Accepting 5%

"Picked it up quick/low impact on your body/fellowship."

Club Facilities 3%

"Club events and facilities."

Convenient &
Affordable 3%

"Cheap and can go anywhere in Australia and play it."

Enjoyable features

For Managers, aspects that made managing the Club easy were quoted primarily as the ease of management administration.

Qualitatively there was mention of taking pleasure in simply looking after Players, ensuring that everyone was kept happy – which wasn't always hard!

Managers only: What are the things that are working well for you and your Club? (n=212)



“Our co-ordinator works well with the Club and our general committee works well with our parent Club.”

“The management committee work well, by trying to organize events and tournaments, to try to keep interest generated in the Club itself.”

“We have a great committee looking after bowlers.”
 – Club Manager QUANT

“Just lovely people. I like to see them enjoy themselves. A lovely social network. Most live alone so this is their network and camaraderie”

“The way our members embrace the different things we implement”

“Mixing with the people. A lot of friendship I enjoy doing it”

“Fellowship and friendship”
 – Club Managers QUAL

Statement Association

During the pilot stage of the quantitative survey, participants were required to agree or disagree with a range of statements regarding the game of lawn bowls. Although the question was subsequently removed, due to the survey running over time, the initial results are interesting and serve to reinforce that which was expressed qualitatively (earlier Word association exercise).

Most pertinently it shows the utter passion for the game, and the shift away from negative perceptions of its traditionally elderly-only target audience. The most polarising issues were regarding it being clique and not moving with the times.

The greatest neutrality, or uncertainty, were in relation to it being a professional sport and whether it was too rigid (13% and 11% 'neither' respectively).

How much do you agree or disagree with each of the following statements about Lawn Bowls in general? Lawn Bowls is... (n=47)

	% agree	% disagree
something I am proud to be part of	100%	0%
fun	100%	0%
a recreational pastime	96%	2%
fair and equitable	85%	4%
an internationally recognised sport	85%	13%
well run and organised	83%	13%
a professional sport	54%	33%
stuck in the past/ not moved with times	46%	48%
a clique	41%	46%
still regarded as an old man's game	35%	61%
a growing sport	28%	61%
too strict/ rigid	15%	74%
elitist	13%	76%
a rich man's sport	2%	96%

"It's got a lot to do with friendship with the other bowlers, you mix in with them fairly well. Some people are a bit cliquey but there's only a few.

Definitely, the mates I've made are through lawn bowls. "

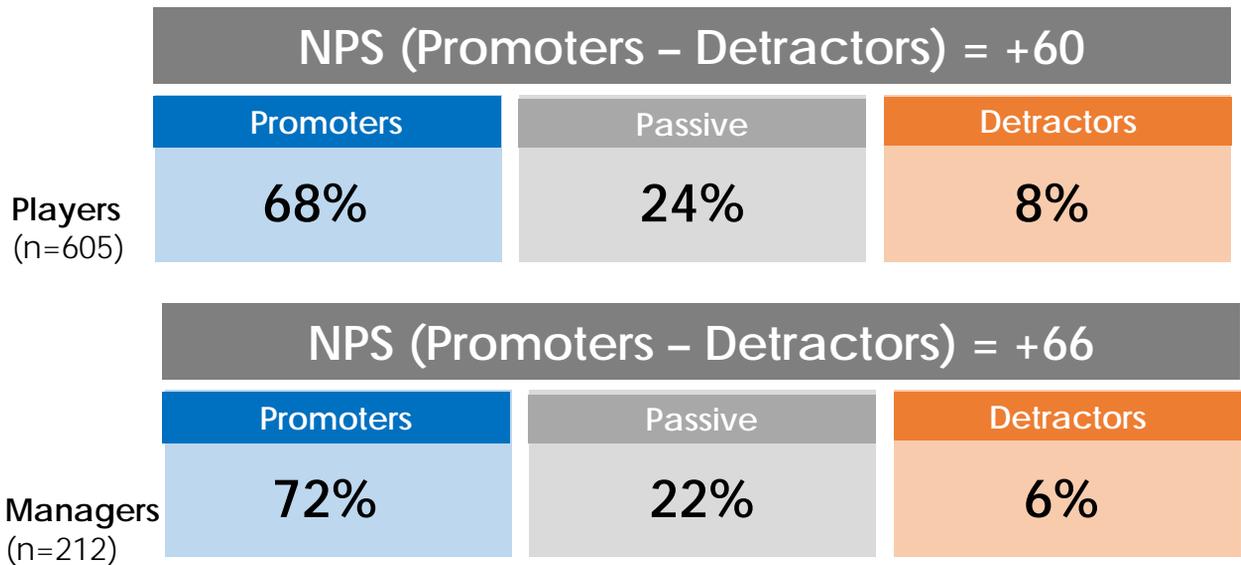
- Registered Player, Newcastle

Advocacy regarding the game

The game of bowls enjoys a very high NET Promoter score of +60 among Players. This means that in a group of 100 Players there are 60 more promoters of the game than detractors.

Members dissatisfaction with their Club, or administrative bodies has had a minimal impact on their enthusiasm for the game itself. BowlsNSW needs to utilise the passionate advocacy of the Players and Managers to help in retaining and winning new members.

How likely are to recommend Lawn Bowls to your peers, friends and colleagues?

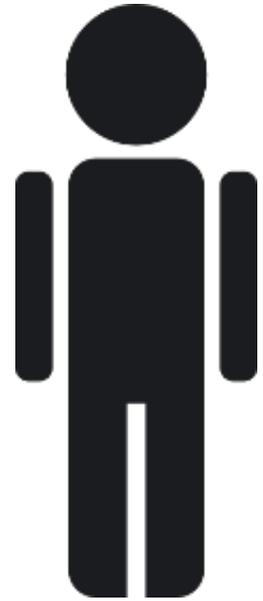


Snapshot of Promoters vs. Detractors



Promoters

- Only a third (36%) over 70 years
- 20% belong to a large Club
- 83% play competitively
- More likely to agree with statements that BowlsNSW are:
 - Knowledgeable experts (57%)
 - Passionate advocates (52%)
 - Pro-active (46%)
 - Innovative (42%)
- More open to receiving communications regarding games and fixtures and general news via email or text



Detractors

- 43% over 70 years
- Only 11% belong to a large Club
- 30% only play socially
- 51% agree that BowlsNSW as out-of-touch
- More likely to disagree with statements that BowlsNSW are:
 - Innovative (46%)
 - Regional focus (44%)
 - Pro-active (43%)
- More likely to want to receive information regarding the games and general news via a magazine

4.3 Understanding of process

Annual Club membership fees

Fees charged ranged from as low as \$5, to a high of \$800! The majority however, paid between \$61 and \$100. Two fifths fall within the \$61-\$80 bracket and a third between the \$81-\$100 bracket. Only a very small percentage paid zero fees – a benefit of life membership. It was however, apparent from the qualitative, that many Clubs had taken the decision to subsidise fees as a means of retaining members – and as a result no monetary gain was achieved, not a revenue stream and had to rely on other source, and does in turn impact on value perceptions?

How much do you currently pay (members)/ charge (Managers) in annual Club membership fees? (n=817)



	\$0/ paid by Club	\$1-\$30	\$31-\$60	\$61-\$80	\$81-\$100	\$101-\$120	\$121+
Players (n=605)	1%	3%	6%	42%	33%	5%	7%
Managers (n=212)	0%	3%	11%	34%	34%	6%	8%

Green fees averaged around \$7, with the lowest fee stated as \$1 and the highest fee stated as \$20. For some these green fees were included in the overall annual Club membership fee.

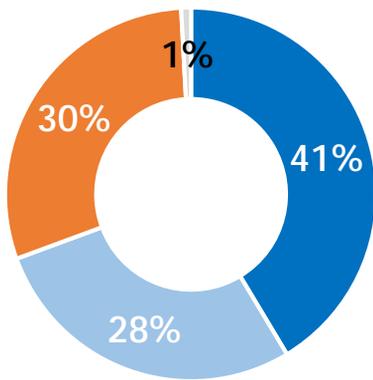
How much do you currently pay/charge in green fees, per game? (n=817)



Allocation awareness

Just under two-thirds of Managers and just over one third of Players consider themselves fully aware of the registration fee allocation process. Players are significantly less familiar with the process.

Are you aware of how your Club membership fee is allocated – so the portion that the Club gets to keep versus the registration amount that has to be paid across to the District Zone, the Royal, and Bowls Australia? (n=817)



- Yes, fully
- Yes, vaguely
- No
- Unsure

	Players	Managers
Yes, fully	34%	64%
Yes, vaguely	31%	18%
No	34%	18%
Unsure	1%	0%

A similar dynamic was observed qualitatively, with varying degrees of understanding exhibited regarding the allocation process. The portion paid onwards to BowlsNSW was guessed to be around \$40 to \$80, although most settled on \$60. Confusion about exact amounts was impacted on by the recently proposed flat rate fee. Surprisingly even a number of Managers were unaware of the total amount forwarded on, and had been caught short – having to subsidise Players rather than increasing fees or requesting an additional amount.

The District/ Zone fee was thought to be around \$12 or \$20.

None were aware of the amount of payment allocated to BowlsAustralia.

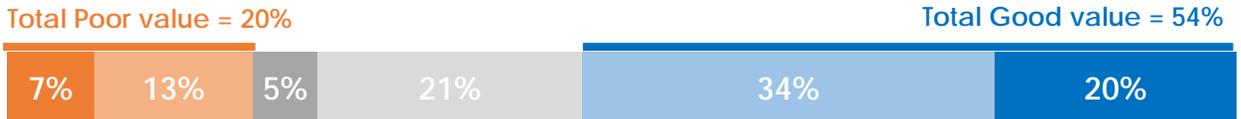
Regardless, the actual process was seen as very straightforward by all (as discussed qualitatively). It was a short, easy form to complete – usually done by management on behalf of the Player.

Value perceptions of registration

Players are significantly more likely to attribute value to the registration payment relative to Managers (54% vs only 21% for Managers).

To what extent do you believe you are receiving value for money for your annual registration payment ...which is incorporated into your Club membership (Players)? ...that is forwarded onto the District Zone, BowlsNSW and Bowls Australia? (Managers)
(n=817)

Players



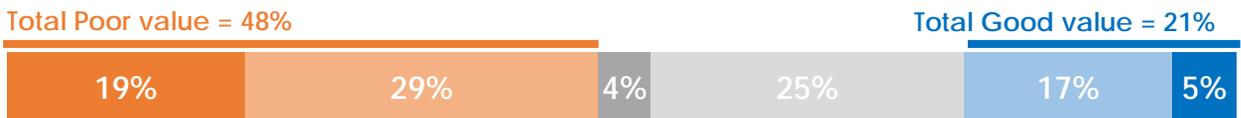
Players aware



Players not aware



Managers



■ Very poor value
 ■ Poor value
 ■ Unsure
 ■ Average value
 ■ Good value
 ■ Very good value

Managers aware



Managers not aware



Value drivers and detractors

Interestingly, the more aware they claim to be of the allocation process (as summarised on the previous page), the more critical they appear to become. This highlights a need to clarify allocation, and demonstrate value – through services.

On discussing the issue qualitatively, it was mentioned by some as an ongoing topic of discussion and bone of contention, exacerbated by introduction of the flat fee structure. Unfortunately it's also a vicious circle, affecting mostly those who are getting the least benefit i.e. older pensioners who are less able to afford it and who choose to play only socially.

Reasons for perceived value

Factors driving negative value perceptions included feelings of insufficient support being provided by State Body to Club, for monies paid. There was also some sense that only high end Players get subsidised, whereas social Players or more average Players don't see much benefit. The perceived lack of communications on how these fees are spent fuels this misallocation theory.

Key reasons for Poor value	Player (n=121)	Managers (n=102)
Most of the money goes to state not the Clubs	41%	29%
Not enough support from the state for the Clubs	21%	25%
Fees are expensive and keep on increasing	11%	14%
Lack of support for smaller Clubs	11%	2%
More focus on elite Players	5%	3%
Don't play often enough	2%	0%
Not enough magazines	2%	4%
Bad management/lack of communication	2%	10%
Lack of innovation/ promotion	0%	5%

Reasons driving positive value perceptions included relative costs, understanding that it covers prize money, admin on all events and promotion. BowlsNSW was seen as 'on call' and provided access to stats and regular feedback.

Key reasons for Good Value	Players (n=322)	Managers (n=47)
Happy with what I get in return	30%	26%
Cheaper than other sports	20%	11%
Well managed Club	19%	13%
Get a lot of enjoyment from the game	12%	4%
Companionship and support	8%	11%
Good Club and bowling facilities	7%	6%
Can play as often as I like	5%	0%
BowlsNSW is well managed	0%	11%

"We used to get a book, a magazine from BowlsNSW printed out and sent to every member. It was mailed to you. They decided as a cost-cutting thing they would do away with it and a certain number would be delivered to the Club and you had to pick them up from the Club, so if you were lucky enough to get whatever number were given, you actually got a copy. They also decided they were going to put it online. I went online today trying to get the latest one on there and all I could get was one from four months ago and three from 2013. Once again, not good."

Registration fees

Great value!

*"It's good value, especially relative to other sports. They do a good job, I get what I ask for."
– Registered Player*

*"For any sport you pay fees and everybody else is double"
– Registered Player*

*"It's great value for money ... if you want to play rugby league the Players are paying their own rego. If you're not paying the first grade, you're paying your own rego which is about \$350 a year to play rugby league"
– Registered Player*

... it's not hidden

*"It's not hidden at all. They let you know where it's going. the Royal when they put out their statements. Income and expenditure statements. It's all in there. There's nothing untoward being done. It's just that a lot of people, particularly pensioners, older people, who are the bulk of bowlers in NSW, they're the ones feeling disenchanting with it"
– Registered Player*

... it's not expensive

*"They're probably not expensive, like if you think of \$65 a year for us, it's not a lot. There's only 52 weeks in the year so it's barely a dollar a week, but it's probably the fact it's going to them (BNSW/ admin). It's not going to your Club. It's going to all those other entities where the money goes, and if your Club wants to promote some sort of bowls, well I think they get about \$5 out of that \$65 maybe, out of what we pay, so our Club gets \$5 from every bowler, and all those other little entities get \$60. That's where, I'm pretty sure, the issue lies..
– Registered Player*

... it's just the allocation

*"It's where then that money that actually goes to the Royal is actually spent. Most of it is spent on all the elite bowlers, inter-state, as far as their expenses go, as far as coaching courses for them, etc. etc. That's basically where most of those fees go. I've got some figures here: 88% of bowlers in Newcastle – and it's pretty indicative of the state as well – are over 50; 8.7% are under 45 and 2% are under 25. Now all of that money, which is basically coming out of people who are over 50, is all being spent on the elite level which are all, as I said, under 40."
– Registered Player*

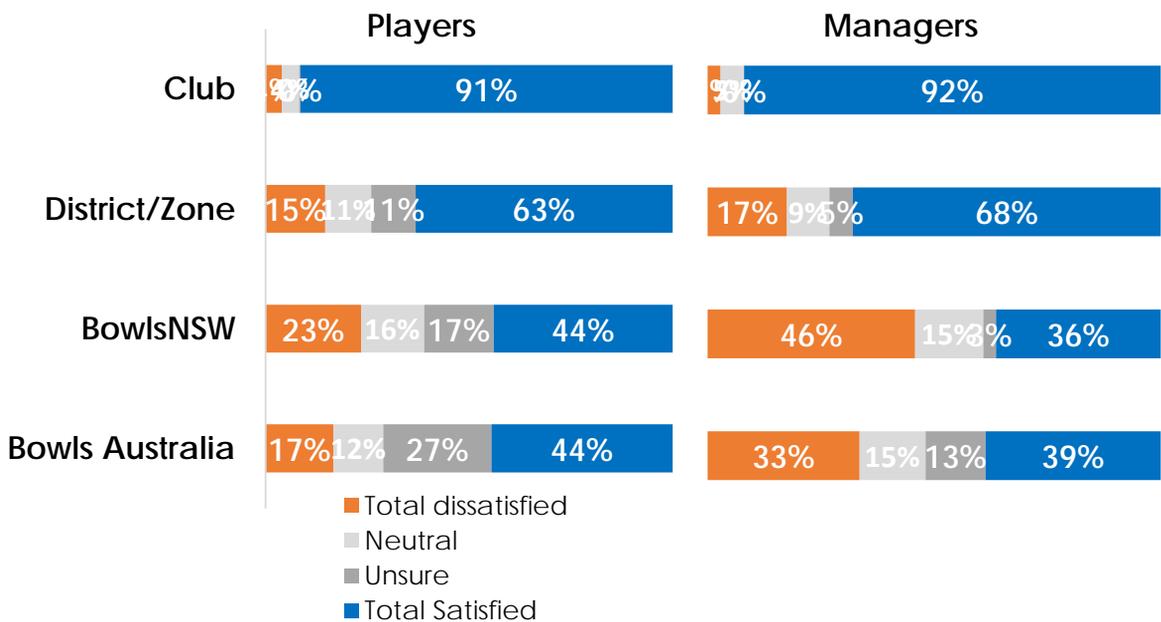
*"It's a bone of contention right throughout the bowling fraternity in NSW, the capitation fees. What you do is you have to pay your Club fees and then you have to pay fees to the District Bowling Association. You have to pay also the Royal NSW Bowling Association and also Bowls Australia, so part of your membership when you join goes to those associations, and the Club gets very little out of it. The bone of contention is that a lot of people seem to think that because they don't want to play competition bowls and would rather just play in galas or whatever, then they should not have to be paying these fees which have increased quite a bit in the past 10 years, quite a bit. They've virtually nearly doubled."
– Registered Player*

4.4 Overall experience and evaluation

Overall Rating

Most Players are limited by their experience. They operate and engage on a Club level and feel less able to evaluate other entities beyond this. As a result we see uncertainty and polarisation increase with more distant relationships. Unfortunately however, dissatisfaction intensifies amongst Managers, peaking at 46% in response to BowlsNSW – and those who are, in theory more experienced in interacting or dealing with the stat body.

On a scale of 0 to 10, how would you rate your overall satisfaction with each of the following? (n=817)



We review these ratings for each entity in more detail in the pages that following, in an attempt to understand the drivers for both satisfaction and dissatisfaction.

Club specifics

Strengths

- Community feeling/ sense of community/ friendly
- Close/ convenient location
- Cheap/ Not profit driven
- Caters for everyone
- Old fashioned but like it basic
- Casual dress code
- Facilities - Great view/ restaurant
- Big, strong, wealthy, taken over by RSL, support bowls
- No opposition as in a remote location

Weaknesses

- Sublet/ Taken over by Leagues Club (profit driven)
- Lack of funds to make structural/ access improvements
- Doesn't welcome new members/ a bit closed
- Not walking distance
- No parking (as so big and busy now)
- Clique
- Disorganized/ poorly run

Structure and patronage

Most appear to use their Club socially as well, and beyond bowls. All had a bar, some had restaurants or canteens, and many had pokies 'it's what keeps us going'. For those that are part of a larger Club, although there was some downsides (with bowls pushed down as a focus) they the reap benefits of being part of a wealthy, well run Club and the mantra 'we'd rather have something than nothing'.

"The Club itself, it is in dire straits for a makeover. It's an old Club, there's nothing pretty about it. All the work that is done there, it's all voluntary. It's keeping it maintained. We have members there that are hands on, volunteer seven days a week, six days a week, doing gardens a lot, maintaining the buildings if stuff needs repairing. The members themselves, they make the Club. Management-wise, I can't go too hard on them. They're doing a pretty reasonable job."

- Registered Player

"The board and the management are very bowls-orientated. It's a big club that makes a lot of money and most of the money goes back to the bowls. It's very good in that regard. Honestly I cannot say anything bad about it. It's good, it's a really good Club."

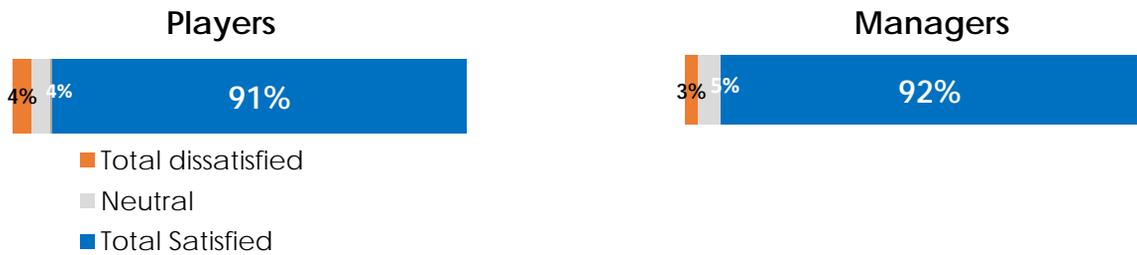
- Registered Player

"The main board runs it. But they're not running us. They're a separate entity to the bowls. They're disorganised. If it wasn't where it is, they'd be broke. Anywhere else, it would be shut 10 years ago. It's poorly run. I was on the board and I tried to make them see things that needed to change and they laughed at me."

- Registered Player

Suggested improvements to Club

Only 3-4% of members expressed some form of dissatisfaction with their Club.



Subsequent suggestions for improvement (asked of all) were thus at low levels. The primary mention was however, around expanding the Club by attracting new members, making it more inclusive and improving existing services and facilities.

Taking everything into account, what changes or improvement, if any, would you like to see made? (n=817)

		Players	Managers
Attract new members	18%	15%	26%
More inclusive	10%	10%	10%
Better greens	9%	10%	7%
Better Club management	6%	6%	5%
More promotions/events	5%	4%	7%
Increase revenue	5%	5%	4%
Barefoot & social bowling	4%	3%	7%
Coaching and support	4%	5%	2%
More games	4%	4%	4%
Relaxing rules/dress codes	4%	5%	2%
More competition	4%	4%	4%
Shaded area over greens	3%	3%	3%
Cheaper fees	3%	3%	1%
Better communication to members	2%	4%	0%
Innovative approach	2%	2%	2%
Update Club/ facilities	2%	2%	3%
Pennants	2%	2%	1%

Current contact and communication

At most Clubs, in line with tradition, announcements are made directly to members mid or post game. These announcements primarily cover upcoming fixtures and selections and sharing of other news or information deemed of interest or relevance at the time. This is supplemented with information being pinned on the noticeboard and occasionally followed by a phone call (e.g. regarding selections).

Some Clubs have commenced the transition to email, and especially onto younger Players. Information is usually regarding selections, or simply a reminder a month before annual fees are due.

A number of Clubs had their own website, but this was primarily used as a static commercial marketing tool, rather than interactive platform (or used by state competition Players to look up details of the other Club prior to travel).

A few of the Clubs, and those with appropriately skilled staff or volunteers, have also moved into the social media space – with mentions of Facebook.

By and large, technology increases relative to the size of the Club and number of registered members. Small Clubs continue to rely on face to face and word of mouth communication. All are restricted by their older, and somewhat less tech savvy Players who are accustomed to simply turning up at the Club.

Most are content with the format and frequency of communications. There is some sentiment that it could be improved but then again they've 'always had it that way'. A few Clubs did however state that they could do with support and assistance from BowlsNSW in this regard (how to create a website, how to launch Facebook).

"We use the notice board, plus a talk, but most of us don't read the notice board, so I'd love an email system, without having to access the Club."

– Registered Player

"No email. We get a text message every now and again, but we've got a phone for that now. We bought a phone so we could get text messages to organise things ... on a gala day for example. So technology, I think they're a little bit behind. They text you or you can go and look at the board or they talk on the microphone. That's the communication. That could be improved a little

bit." – Registered Player

Communication preferences

Future preferences were surprisingly consistent, across fixtures and other more general news. Most stuck to tradition, opting for the noticeboard, followed by email. Texting and electronic versions of the BowlsNSW magazine were least favoured.

In future, how would you like to receive information about game fixtures (matches, competitions, pennants)? (n=817)

		Players	Managers
Club notice board	 64%	64%	61%
Email	 43%	39%	56%
Magazine	 34%	32%	38%
On-site verbal announcement	 26%	26%	25%
Mail	 25%	23%	29%
Website	 24%	20%	32%
Facebook/ social media	 15%	14%	18%
Text/SMS	 14%	13%	16%
Electronic Magazine	 12%	11%	15%
Don't want any information	 2%	3%	0%

In future, how would you like to receive information about more general news and future events? (n=817)

		Players	Managers
Club notice board	 60%	61%	58%
Email	 45%	41%	58%
Magazine	 38%	37%	39%
Mail	 27%	25%	31%
On-site verbal announcement	 25%	26%	23%
Website	 23%	19%	33%
Facebook/ social media	 16%	13%	22%
Electronic Magazine	 12%	10%	17%
Text/SMS	 12%	11%	14%
Don't want any information	 2%	2%	0%

Views on District/ Zones



Levels of dissatisfaction with their District/ Zones increased relative to their Club, with around a sixth (16%) expressing some form of dissatisfaction. Dissatisfaction was driven primarily by inadequate communications – and consistently mentioned across both Players and Managers. Some District Representatives were viewed as not having taken a visible interest in the Club or the challenges it faces. They were criticised for not passing on information from the State Body, or for not being more inclusive in their decision making process.

“I have not seen a District representative visit our Club for the 10 years that I've been a member. It is a shame that this is so.” “More discussion with individual Clubs.”

“Start passing on information from the Royal/ More sharing of decision-making.”

Taking everything into account, what changes or improvement, if any, would you like to see made? (n=817)

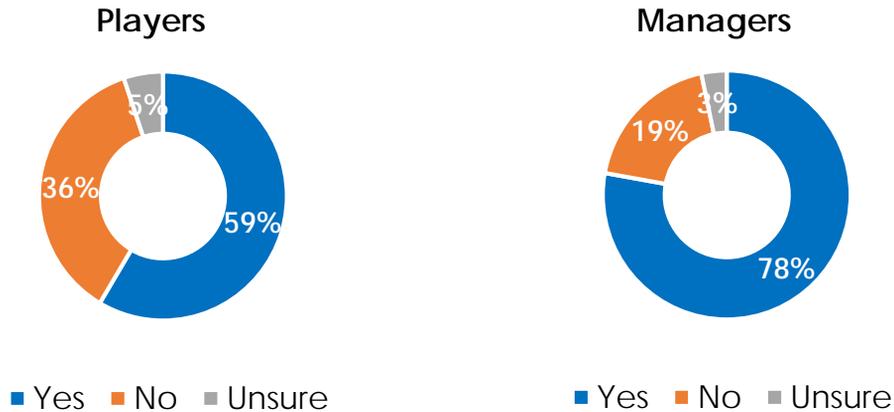
		Players	Managers
Better communication	16%	16%	15%
Promote the game	11%	11%	9%
Reduce travelling for competitions	6%	7%	4%
Pennants	6%	6%	6%
Flexible fee structure	5%	7%	3%
Better management	5%	5%	5%
More flexible & innovative	4%	5%	3%
More funds back to Clubs	4%	4%	5%
More professional	4%	3%	5%
More support for smaller Clubs	4%	3%	6%
Less politics/more transparency	3%	4%	2%
Clear competition regulations	2%	3%	1%
Mixed games	2%	2%	3%
Amalgamation	2%	2%	3%
Less focus on elite Players	2%	1%	3%
Better selection	2%	3%	1%
Upgrade facilities	2%	2%	3%
Fairer grading	2%	3%	0%

4.5 Bowls NSW

Understanding of role and function of BNSW

Players are significantly less likely to have an understanding of the role and duties of BowlsNSW (59% vs 78% for Managers).

Before today, would you say you were aware of the role and duties of BowlsNSW?
(n=817)



A subset of those who stated awareness of the role and duties of BowlsNSW, were presented with a list of functions and asked to select those they agreed formed part of this role. In general, Managers emerged as more across the functions performed, relative to Players. (Note: this question was only asked during the pilot, and then removed. Hence the low base size, and findings should be treated as indicative, not definitive)

Which of the following were you aware of? (n=30)

	Players	Managers
Setting the rules/ conditions of play	95%	100%
Managing grading, coaching and official accreditation	86%	100%
Providing advisory services to local Clubs and members	86%	100%
Promoting bowls as a sport in NSW	86%	100%
Communicating with Clubs	82%	100%
Maintaining the member database	73%	100%
Helping retain and increase members	64%	100%
Liaising with various government bodies	68%	80%

Understanding of role and function of BNSW

Within the qualitative group discussions, extensive probing was undertaken in an attempt to establish respondents degree of understanding of the current role and remit of BowlsNSW.

In most cases, respondents (Players and Managers alike) struggled to verbalise the perceived role, and consequently the range of benefits offered by the organisation. There was general acknowledgement of the need for a governing State Body to oversee the game, 'bring it all together', offer support and promote the game but there was no tangible evidence of them fulfilling this role. A few also viewed the board as reactive or disinterested, or when making an appearance, expecting to be wined and dined in return.

Role is...

- Issuing of memberships
- To manage the welfare & satisfaction of members
- Governing body operating out of Sydney
- Coordinate Zones/ events in the region/ state
- Responsible to Bowls Australia
- Setting rules of the game
- Coaching and development
- Supporting Clubs, to run a better Club
- Promoting the game

A handful were however, very familiar with all that BowlsNSW had to offer, had called on this expertise and were very positive about their experiences. They praised the organisation for always being approachable, and responding promptly.

Understanding of role and function of BNSW

'I emailed at 7.30am and got a reply by 9.30am from Chantelle'

'They're a mystery. Faceless, nameless. I wouldn't know who they were. Anyone know the president of Bowls NSW? I wouldn't have a clue who he was. Wouldn't know him from a bar of soap.'

'There are lots of shareholders... but I couldn't name one person'

*'To be a liaison, administration and help, but there is **no clear contact at BowlsNSW** (of who this is)'*

'If you try to ring the Royal – you only get to speak to a junior who knows nothing'.

*'I want a **prompt, senior responses** – not Felicity, whose in the office. I want clearance'.*

'Punctuality – not waiting 6 months for an update of lists'

'Nothing. No-one appears to come down to help us.'

'Not seen an executive presence'

*'I've **never seen any interest into our area** from BowlsNSW whereas Zone to us work pretty well'*

*'They **should be helping and supporting**. Their perceptions are that it's all fine on the coast, but all we get is colourful magazine and a bunch of circulars'*

'Unelected/ unaccountable to members / soviet model. Should not be letting Clubs run into the ground'

*'**On a pretty good jack**, after their meetings, off to Chinese restaurants & wine, with members paying for their dinner'*

'All in good junkets/ on good salaries/ Too many fat cats'

'I'd really like to know! As I honestly don't know'

- Registered Players

Perceptions of BowlsNSW

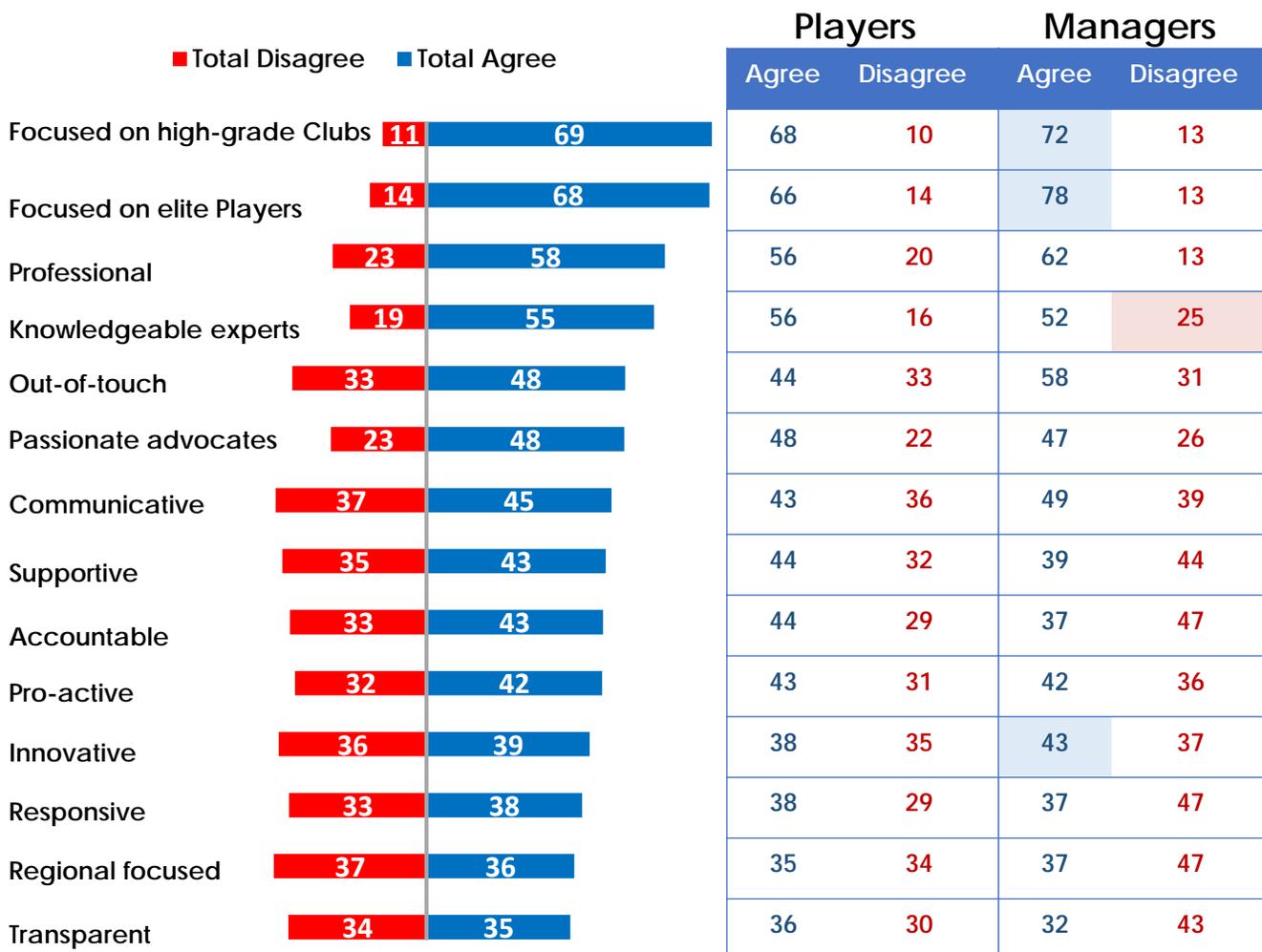
Prior to testing understanding of the organisation, participants were subjected to a list of attributes and asked to agree or disagree across a 5-point scale.

Prompted associations subsequently illustrate strong perceptions of focus (or some would say bias) towards high grade and elite Players. This is significantly stronger amongst Managers.

On a positive front, the majority of Players do view BowlsNSW as 'professional' and 'knowledgeable experts'. Managers are however, significantly less likely to agree with the latter statement.

On a more negative note, the organisation is not strongly associated with being either 'transparent' or 'responsive' by both audiences.

How much do you agree or disagree with these words used to describe BowlsNSW? (n=817)



Suggested improvements to BowlsNSW

Higher levels of dissatisfaction were observed in relation to the perceived performance of Bowls NSW, than their Club or Zone – with almost a quarter of Players and almost half of Managers expressing some form of dissatisfaction.



Most dissatisfaction was in response to fees, and as voiced by both Players and Managers. This was a spontaneous suggestion, and arose prior to any specific or prompted questioning in this regard (i.e. see earlier section on Registration). There was further a call for increased support, especially amongst smaller and regionally located Clubs.

Taking everything into account, what changes or improvement, if any, would you like to see made? (n=817)

		Players	Managers
Fees	20%	20%	20%
Help for smaller/rural Clubs	14%	12%	18%
Better support for Clubs	9%	9%	9%
Better communication/newsletter	9%	7%	10%
More promotion of the game	8%	9%	6%
Too many changes to the rules	4%	4%	4%
Attract younger Players	4%	4%	4%
Better management & more efficient	3%	3%	4%
Inclusive decision making process	3%	1%	6%
More interaction with Clubs	3%	2%	4%
Flexible and innovative approach	3%	3%	3%
Attract new members	2%	3%	1%
More transparency	2%	2%	2%
too much travelling for games	2%	2%	2%
Mixed games	2%	1%	2%
Pennants	2%	2%	1%

4.6 Challenges and detractors

Dislikes of the game

Most are extremely passionate about the game. There are however, some consistent irritations that surfaced. These are generally at low levels and merely detract from their enjoyment of the game, but none are sufficiently critical to actively discourage them from play.

Players only: What do you NOT enjoy about lawn bowls/ the things that put you off the game? (n=605)

Politics

"The Club politics, people talking about others."

"Politics/ pennant teams, some people are favoured over others."

"Politics and hierarchy."

Too Competitive

"Sometimes the other members can be too competitive and they don't treat it as fun."

"The Player that just has to win, they spoil the game somewhat."

Administration

"Inconsistencies between the Royal and the Clubs."

"The royal LawnBowls NSW not getting involved in smaller community/Club."

Weather dependant

"Wet weather and when very hot."

"That it is dependent on the weather."

Too unregulated/ changeable

"Constant rule changes."

"Changing the structure of pennants playoffs systems."

Lack of flexibility

"Very much set in old ways and there is no development to develop the sport to it's current millennium; it means the sport hasn't changed in any way; no support from the Royal to encourage the drive for younger Players."

Fees & Costs

*"Cost of uniform and the amount spent on bowl sets."
"Paying too much money to the State."*

Unbalanced focus/Unfair

"The selectors do not always select on merit, more on social skills."

Dislikes of the game

As listed on the preceding page (a summary of issues listed in the quantitative survey),

- Most criticisms revolve around the **politics** surrounding the game, this included selections and perceived bias or favouritism in this regard,
- Some **etiquette** issues arose e.g. Players running after the ball, and how the appropriate behaviour was no longer being taught, leading to misunderstanding and conflict across the 'the old guard' vs newer Players. There was also an ongoing battle between those finding it hard to accept change (e.g. pyjama bowls) vs those wanting **increased informality and flexibility** (e.g. shorter games).
- A similar debate raged between social and competitive Players, with the former often finding certain Players 'too competitive'. Interestingly though, many of the median aged (40-60 yrs) Players mentioned that there was insufficient competition opportunities for their age group.
- Some **administrative** issues were raised. Given that most Clubs are largely run by volunteers, and reliant on their good will, it meant inconsistent service levels and /or lack of or declining input from professionals in their field. There was further some sense that management and board members were often elected due to popularity not competence or capability. There some perception that there was limited opportunities for younger Players to be involved in administration (whereas in the qualitative there was the opposite view, with Manager stating that it was hard to get the younger Players to put their hand up).
- Although most criticisms were at a Club level, some were directed at BowlsNSW – with mentions of poor input, limited support or high registration fees.
- Minimal environmental issues were raised e.g. non-prepared green, although some Clubs battled more with maintenance and upkeep, due to minimal funds.

Challenges faced by Club Managers

For Managers the greatest headache was trying to boost membership, whilst managing costs and generating revenue for the Club. There was an acknowledged need to promote the game, but this was challenging in itself.

Managers only: As a Manager/ decision maker, what are some of the main challenges you and your Club face in managing lawn bowls? (n=212)

Membership
46%

*"All about members, need younger members."
"Getting more people to participate in games of bowls."
"Falling membership of bowling Clubs."*

Revenue generation
20%

*"Making money, keeping the patrons happy and maintaining a friendly atmosphere."
"The upkeep with the income received/ 80 dollars goes to the Royal and only a few magazines come back."*

Promoting bowls
12%

*"I don't think the game is exposed enough at the top level."
"Promoting the game is hard."*

Player Admin
11%

*"To try to complete all the championships on time, because we are a small Club."
"People who don't want to play with certain people."*

Politics
6%

*"Getting along with the hierarchy and the main people."
"Our elected board are anti-bowling and we have tried to overthrow them. They want to turn it into a motel or something with 1 green."*

Costs
4%

*"Cost of maintaining greens."
"The costs, namely fees payed to admin."*

Resourcing & Collaborating
1%

*"Having enough Pennant bowlers."
"Making sure that enough people do the work."*

4.7 Future focus

Priorities for future focus

Almost all agree that the focus should be on recruiting new members. Managers in particular are conscious of this need. This is followed by the need to retain existing members and to promote the sport.

Going forwards, how important are each of the following to you and your Club?

(n=817)

	TOTAL IMPORTANT	Players	Managers
Recruiting new members	99%	98%	100%
Retaining current members	98%	98%	99%
Increased promotion of the sport	97%	96%	98%
Increased TV airtime of the game	86%	85%	89%
More mentors/ coaches	83%	83%	81%
More volunteers	82%	81%	85%
More flexible playing times	77%	76%	78%
More emphasis on social only Players	75%	75%	77%
More professional administration	71%	71%	71%
More competition categories	69%	71%	65%
More flexible game styles	64%	62%	67%
More professional staff	63%	62%	67%
More flexible rules	45%	45%	45%
Less emphasis on pennants	42%	42%	41%
Shorter games	33%	32%	34%

Future view

There was general acknowledgement that the sport is static or in slow decline and a fear that many of the smaller Clubs would not be surviving for much longer. This is followed by varying levels of surprise, resignation or finger pointing.

The demise was blamed on a range of contributing factors including – the ageing membership base, not being topped up with new or younger Players, the pressures of modern life, younger families not having the luxury of time to attend, lower disposable incomes (due to higher mortgages), increased competition from a raft of other sports or non-sports on offer. The game was also thought to be suffering from lack of promotion and image issues.

A few however, are unperturbed and those from proactive Clubs remain optimistic and even enthusiastic.

“Getting smaller and smaller/ Floundering/ Lots of Clubs are gone now/ If it continues the sport will disappear/ Lots of Clubs doing it tough/ Some Clubs will be lucky to be here in 5 years.”

– Registered Player

“Very difficult to get young involved as so much else for them to do.”

– Registered Player

“Only big Clubs will survive or those who can afford the marketing. Our Club is fine, it’s a big Club so we’re not worrying.”

– Registered Player

“It’s exciting’/ It seems more people playing, but less are registered. Although it’s hard to tell, as there seem to be lots more young playing”

– Registered Player

Future focus and necessary action

All spoken to qualitatively were open to growth. A degree of resistance from the older generation was to be expected, but the benefits attained through increased members outweighed the upset or inconvenience. Many Clubs were implementing some form of initiatives in an attempt to stem the flow, and priorities had shifted to getting 'people through the door'. Suggested actions included:

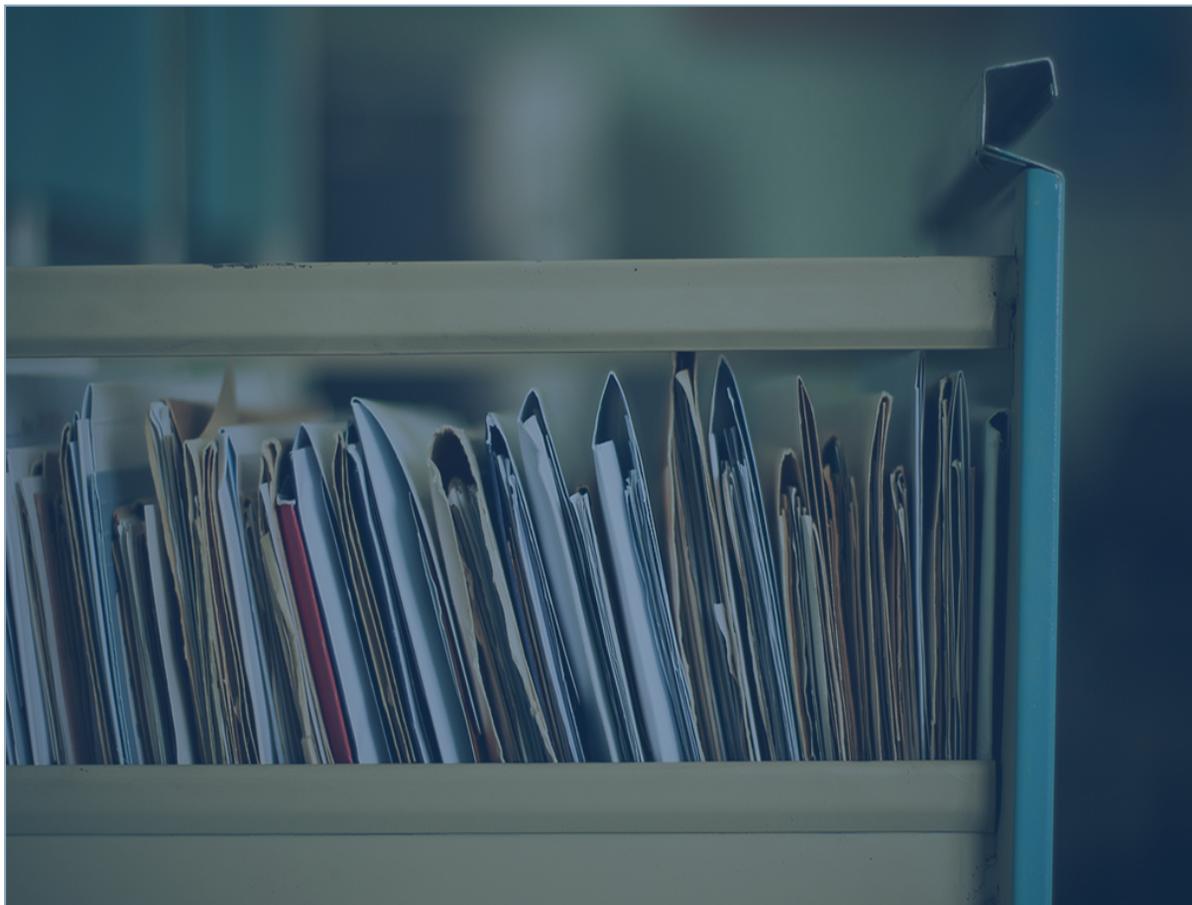
- Extensive **promotion** of the game – improved advertising in order to make the game more inclusive and appealing
- **Targeting youth** – although this was the commonly made suggestion, the value was debated. Introducing programs through schools and interschool competitions would help to build a passion from an early age, the conversion rate was expected to be low, given the alternatives available and the expectation that most would abandon the game after school, only to return many years later.
- Numerous requests were made to '**put it back on TV**/ telecast like the Australia open', to bring it back into the public eye.
- **Cross promotion and sponsorships** (e.g. of local rugby Club or packages. a golf, a beer and a bowl)
- Need to get revenue generators (which not the oldies)
- **Increased training and mentorship**, through access and exposure to good Players and coaches
- State should take initiative
- Standardize, review or freeze the **registration payment** (going up too high too fast)
- **Increased flexibility**, for example, introducing shorter games

"Make it attractive/ Improve public perceptions of the game by advertising, utilizing a more upmarket campaign aimed at youngsters, which would have more success. Show the party and make it more all-round"

- Registered Player

"I think we need to change the format of the games. It's got to be something that you can get over and done with quick so people can get back home and do what they want to do rather than being dragged out over an extended period."

- Registered Player



Appendix:

Qualitative Discussion Guides
Quantitative Questionnaire

For further information about this research please contact:

UMR Strategic Research

Email: Laurette.douglas@umrstrategic.com

Phone: 02 9386 1622

Web: www.umn.info