



A Final Qualitative & Quantitative Report Prepared for:

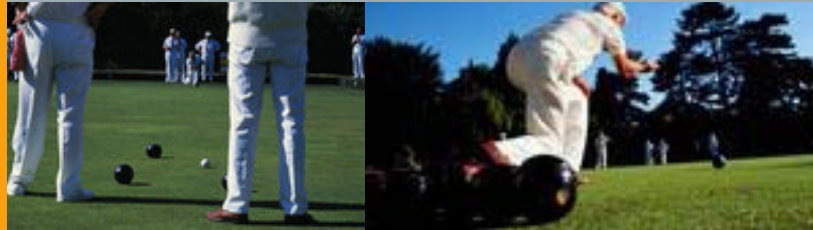
Bowls Australia

'Building Participation in Lawn Bowls'

Prepared by: Martin Hiron, Anna Nguyen and Georgie Camakaris
Study No. 15025 • February 2006



OUTLINE



Background

Objectives

Research Approach

Detailed Findings

PART A

Section One – Interest Levels & Market Sizing

Section Two – Attitudes Towards Lawn Bowls

Section Three – Imagery

Section Four – Initiatives

Section Five – Profile of Occasional, Potential & Potential Non-Pennant Members

Appendix - Background Data

PART B

Section Six – A Snapshot Of Their Lives

Section Seven – Leisure Time

Section Eight – The Sports Landscape

Section Nine – Lawn Bowls & Where It Fits

Section Ten – Initiatives & Other Issues

Section Eleven – Additional Discussion

Conclusions & Key Recommendations

Appendix 1 – A Snapshot of Sydney Residents

Appendix 2 – The Questionnaire

BACKGROUND

Bowls Australia commissioned a market research study to assist in determining the 'best customer' segments or groups to consider for recruitment in order to grow the game; another key requirement was to retain current club members and grow active participation in the sport.

The focus on some or all of these 'participant groups' will underpin the long term viability of bowling clubs.

Current membership numbers are around 270,000, with males making up around 65% of the participants. There is a perceived opportunity to encourage more women into the game (if current barriers/attitudes are overcome). The current membership data available also shows that 80% of members are 65 years plus.

However, there may be specific skills lacking in the management of the club environment, which hinders, in some instances, the ability to acquire and grow the membership base.

Much of the competition at club level focuses on pennant with the format in the Southern States played on a fixed day of the week (men - Saturday, women - mid-week).

Recently there has been the development of a Saturday 'Ladies' pennant competition that caters for a growing segment. There are also a range of competitions played throughout the week that are diverse.

While various trial programs including 'Get on the Green' have been effective in building some initial sampling of the game, the conversion of these triallists has been relatively low. Therefore, there is a feeling that a new category of membership may need to be created to capture the casual or occasional bowler.

In SA and WA there has been some success evident in attracting new markets to the game including corporate groups and those in the 29-45 year old category.

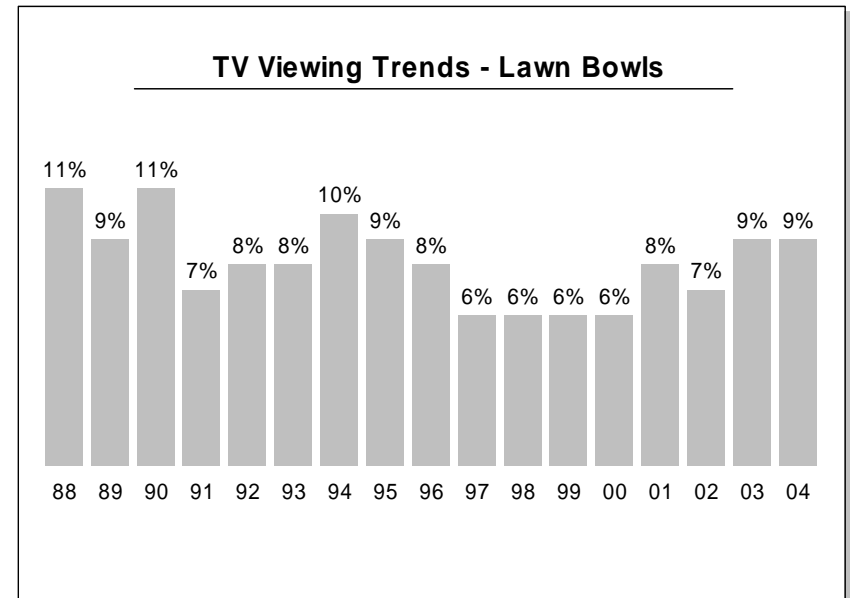
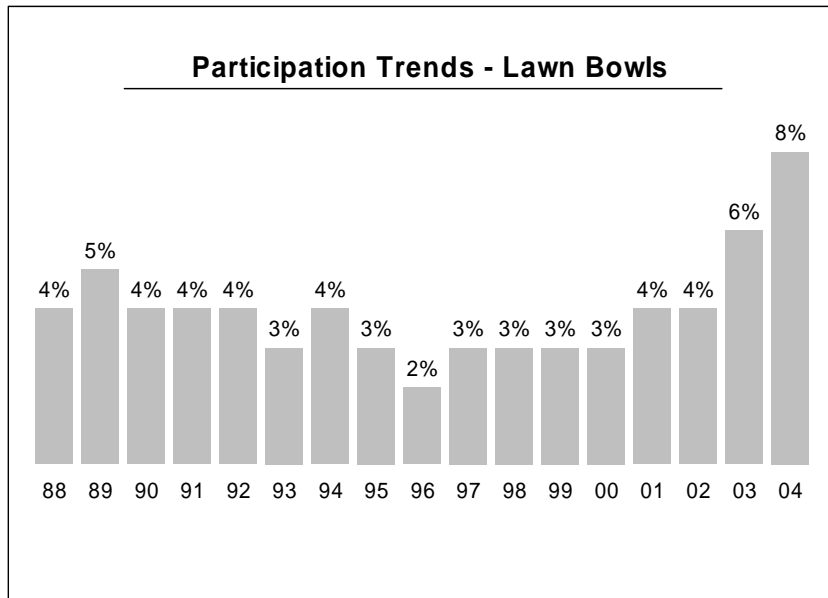
Sweeney Sports, a division of Sweeney Research was commissioned to conduct research for Bowls Australia. What follows in this document is the final report from both the quantitative and qualitative stages from the research conducted during October/November 2005.

Of note is the fact that the last piece of research that was conducted by Bowls Australia was in 1998, with a smaller Get-On-The-Green evaluation conducted in 2002. The Australian sports and leisure market has continued to change since this time.



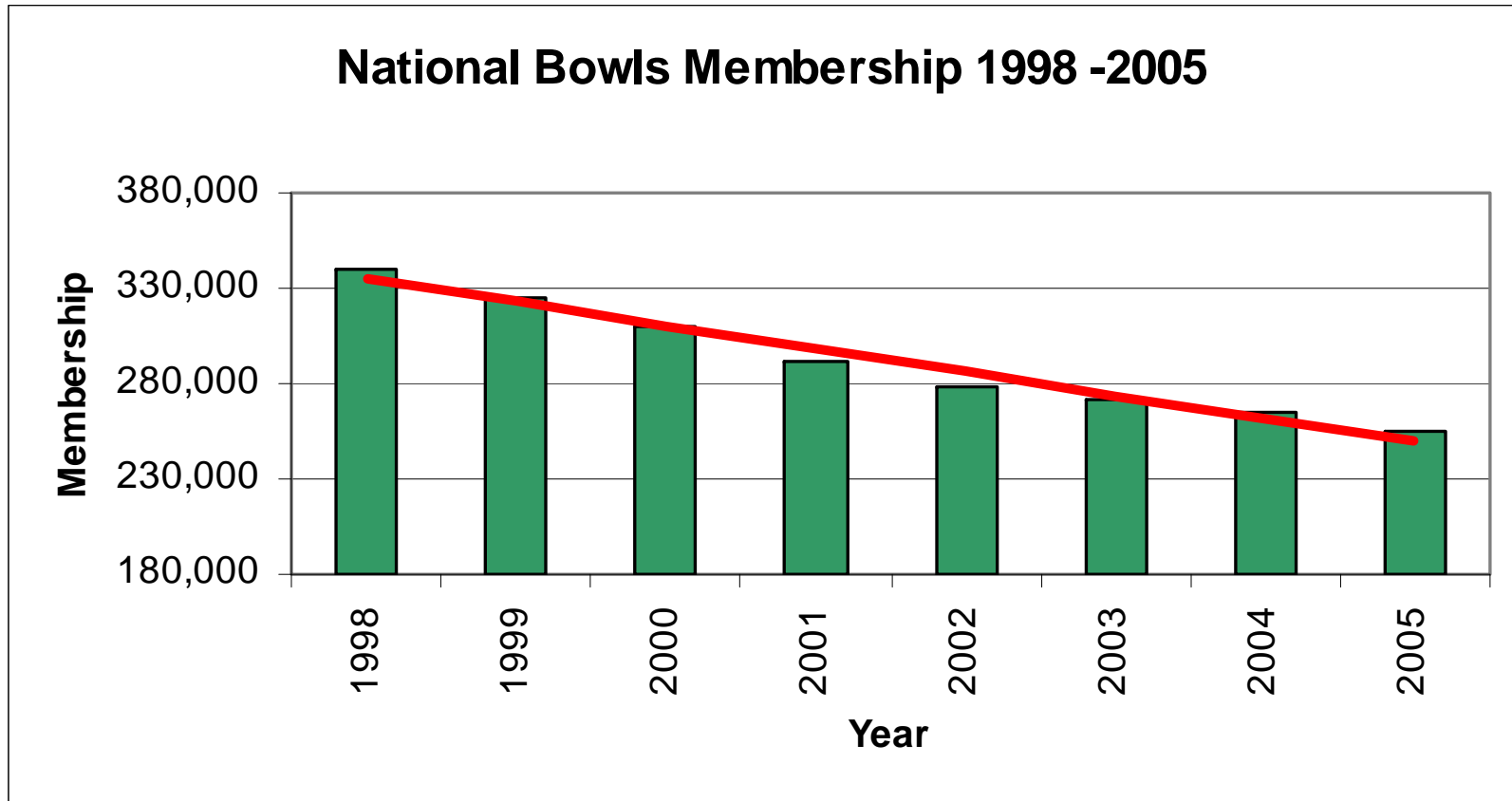
ADDITIONAL DATA

Recent data from the Sweeney Sports report has shown some growth in reaching new markets – but only at the casual or occasional level...



ADDITIONAL DATA

NATIONAL MEMBERSHIP FIGURES FOR BOWLS



However, there has also been a significant decline in National membership figures at around four percent per annum.

OBJECTIVES

The overall objective of the research was to:

Determine the group(s) or segment(s) with the most potential to build participation in bowls.

More specifically the research aimed to:

- ◆ Establish the current levels of interest in lawn bowls
- ◆ Determine the depth and breadth of attitudes towards bowls
- ◆ Explore the perceptions of the game of bowls including:
 - Strengths and weaknesses
 - Barriers
 - Understanding of the sport
- ◆ Establish the key brand parameters of bowls... and how they relate to Australians
- ◆ Establish the likelihood to participate in bowls and interest in alternative formats
- ◆ Explore attitudes towards club membership in general, its format and identify some of the possible alternatives to club structure(s)
- ◆ Explore various parameters and initiatives that may enhance appeal of the game (including price issues)....among many others.
- ◆ Identify interest levels in other sports and activities
- ◆ Explore barriers and drivers of the major activities/sports

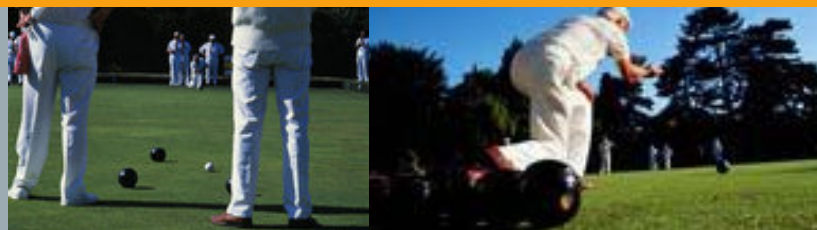
RESEARCH APPROACH

The quantitative aspect of the research involved 475 telephone interviews conducted amongst Australians aged 20 years and above. Quotas were set for the appropriate area/region with interviews being conducted in regional Victoria (Bendigo), Sydney, the Central Coast NSW, Brisbane and Adelaide. The selection of the geographic regions included was made in conjunction with Bowls Australia.

- ◆ Included in the questionnaire was a series of screening questions which established respondents' current or potential involvement in lawn bowls...
- ◆ At least some interest in the sport whether it be playing casually socially; or
- ◆ Consideration to join a club or play socially; or
- ◆ Watch the sport on TV: or
- ◆ Consideration to attend an international or national lawn bowls event in the future.

A copy of the questionnaire used in the research appears in the appendix of this report.

A follow up qualitative stage of the research involving group discussions was also conducted and the key findings appear in the second half of this document.



PART A: The Quantitative Research

SAMPLE PROFILE

The tables over the next two pages highlight the sample profile of those that qualified for a full interview.

There are some figures for both unweighted and weighted data. The focus for Bowls Australia is to concentrate on the weighted data.

As shown, there is great **potential** in the sport of lawn bowls as it shows there is broad interest from;

- ▶ A wide variety of age ranges
- ▶ Almost equal proportion of males and females
- ▶ A wide variety of income groups (ie. the sport is not just a blue collar opportunity!)

*Re-percentaged to exclude refusals

	475 #	Unweighted %	Weighted %
Age			
20-24 years	49	10	10
25-29 years	45	9	11
30-34 years	54	11	14
35-39 years	56	12	16
40-44 years	64	13	12
45-49 years	66	14	13
50-54 years	46	10	9
55-65 years	96	20	15
Gender			
Male	213	45	53
Female	263	55	47
Location			
Regional Victoria (Bendigo)	75	16	1
Sydney	125	26	56
Central Coast (NSW)	75	16	5
Brisbane	101	21	24
Adelaide	100	21	14
*Pre-tax household income			
< \$30k	59	14	11
\$30k-\$39k	45	11	9
\$40k-\$59k	79	19	17
\$60k-\$79k	77	18	18
\$80k-\$99k	61	15	17
\$100k-\$124k	52	12	13
\$125k-\$150k	19	5	6
Over \$150k	25	6	9

SAMPLE PROFILE (Cont.)

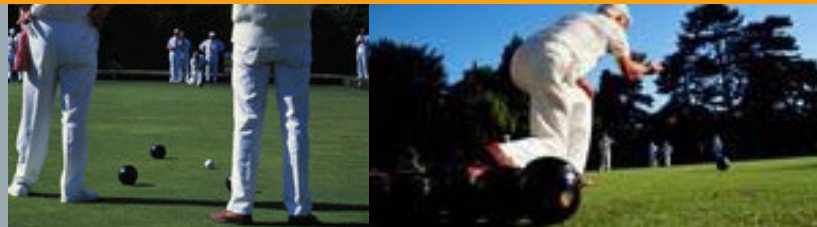
Further profiling opposite shows...

- ◆ Two-thirds of those broadly interested in the game are married or living in a relationship
- ◆ Two-thirds don't have children living in their household; so there are solid numbers of young adults, couples and empty nesters with potential time on their hands to be involved in the game at some level (that is, if the game is aspirational enough and offers a valid value proposition)

	475 #	Unweighted %	Weighted %
Lifestyle			
Married or living in a relationship	304	64	65
Single, divorced or widowed	168	35	35
Adults and children living in household			
One	88	18	18
Two	157	33	31
Three	85	18	18
Four	91	19	22
Five	38	8	9
Six or more	12	3	2
Children under 18 years living in household			
None	319	67	66
One	53	11	11
Two	68	14	16
Three	23	5	5
Four or more	7	1	1

*Re-percentaged to exclude refusals

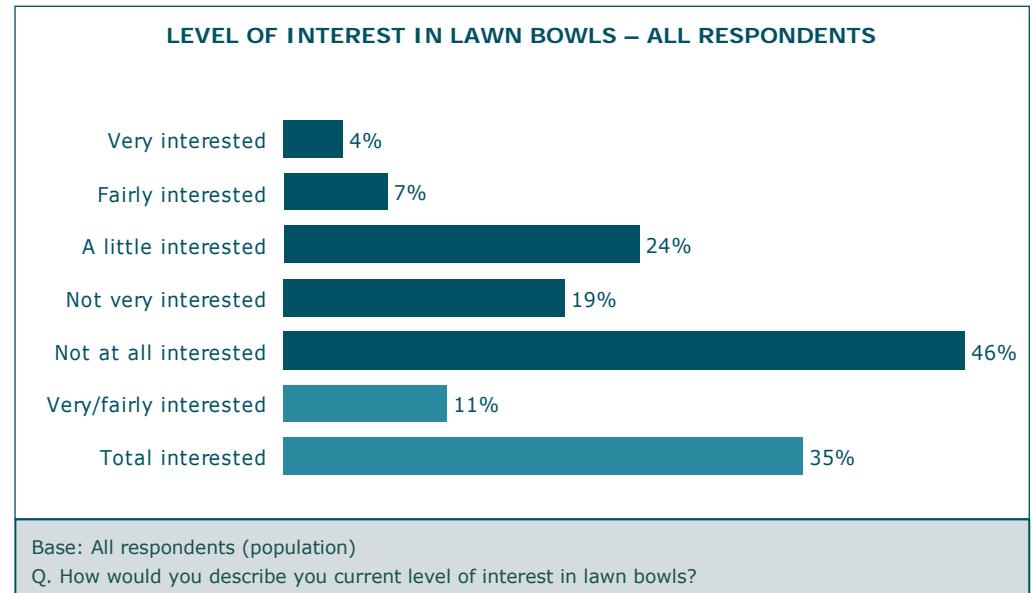
DETAILED FINDINGS



SECTION ONE: Interest Levels & Market Sizing

LEVEL OF INTEREST IN LAWN BOWLS – ALL RESPONDENTS

- ◆ There were a series of screening questions exploring different interest criteria in lawn bowls.
- ◆ The first question looked at interest in lawn bowls across dimensions of very, fairly, a little, not very or not at all interested in lawn bowls. At this level, across the 'general population', one in nine (11%) show fairly strong interest, with one in three (35%) overall having at least a **little** interest in the game.

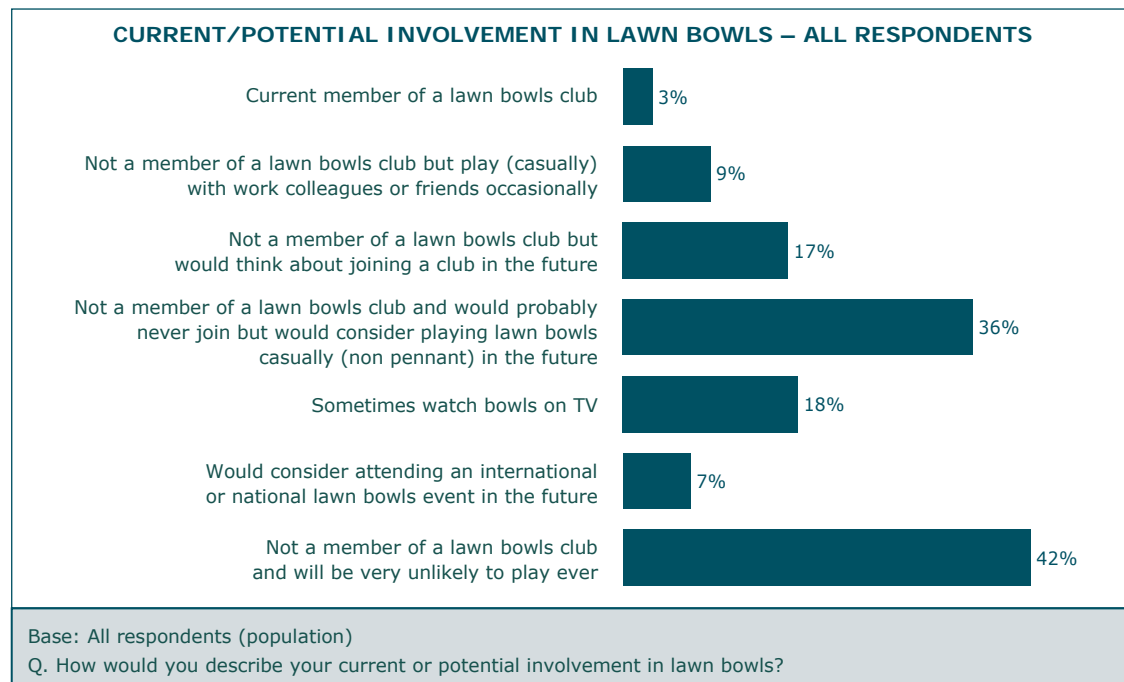


CURRENT/POTENTIAL INVOLVEMENT IN LAWN BOWLS – ALL RESPONDENTS

Those same respondents were also asked a series of statements about their current or potential involvement in lawn bowls.

As shown opposite... the key highlights include;

- ◆ Around 3% of those aged 20-65 years, in the five specified markets, are current members of a club
- ◆ 9% play casually with work colleagues or friends
- ◆ 17% would think about joining a club in the future
- ◆ One third would consider playing casually (non pennant)
- ◆ Four in ten (42%) would be very unlikely to play ever – this proportion equates to those 'not at all interested' shown on the previous slide



CURRENT/POTENTIAL INVOLVEMENT IN LAWN BOWLS – ALL RESPONDENTS (Cont.)

Further analysis shows that...

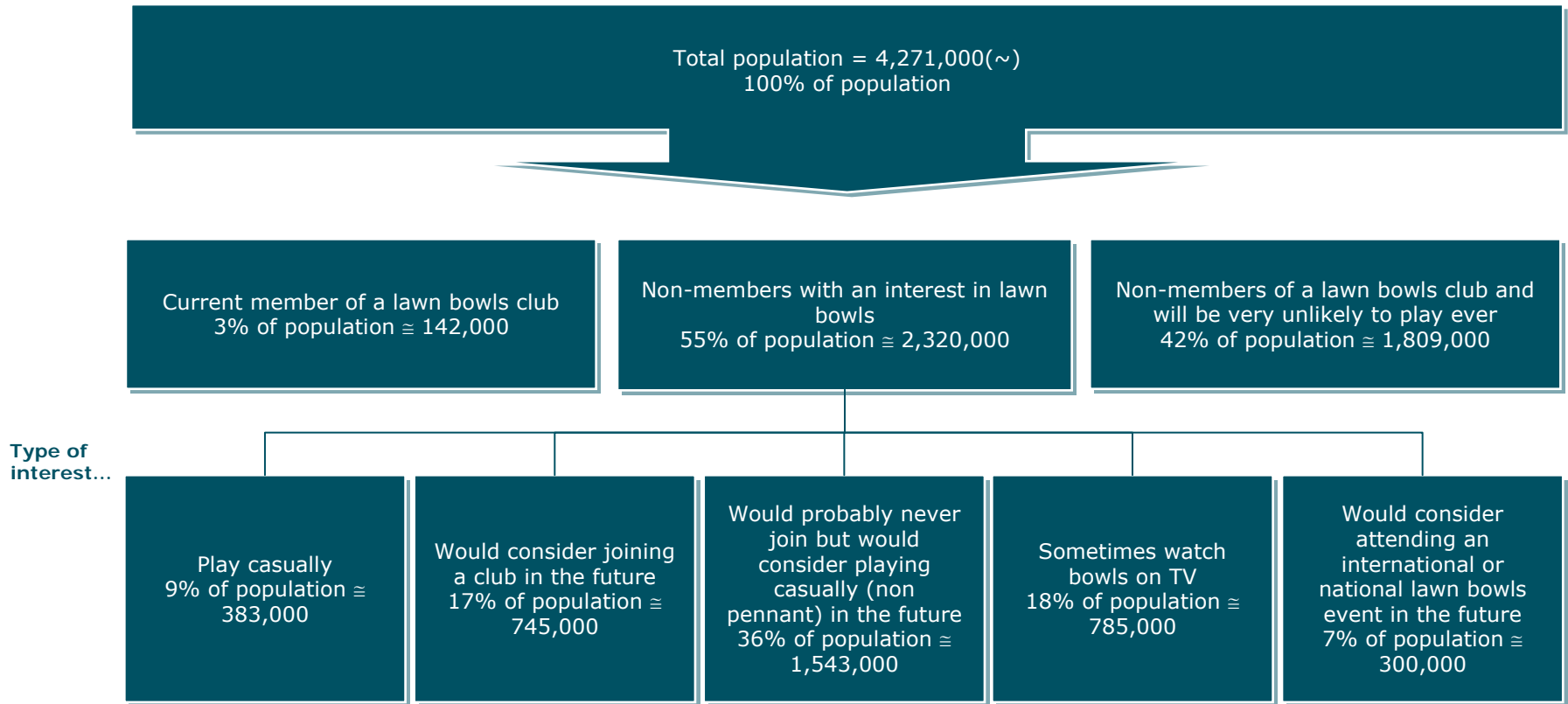
- ◆ The casual or social game attracts a strong audience under 40 years of age
- ◆ Consideration to play casually (non-pennant bowls) in the future resonates most with the under 30's - with the 40-49 year olds also showing strong interest
- ◆ The TV product is still heavily skewed to the 40 pluses

	Total (476) %	Gender		Age			
		Male (213) %	Female (263) %	20-29 (94) %	30-39 (110) %	40-49 (130) %	50-65 (142) %
Current member of a lawn bowls club	3	4	3	3	3	3	5
Not a member of a lawn bowls club but play (casually) with work colleagues or friends occasionally	9	11	7	16	11	6	5
Not a member of a lawn bowls club but would think about joining a club in the future	17	19	16	3	16	24	23
Not a member of a lawn bowls club and would probably never join but would consider playing lawn bowls casually (non pennant) in the future	36	36	36	57	33	38	24
Sometimes watch bowls on TV	18	24	13	5 →	18 →	19 →	27
Would consider attending an international or national lawn bowls event in the future	7	7	7	4	8	7	8
Not a member of a lawn bowls club and will be very unlikely to play ever	42	38	47	36	46	40	45

Base: All respondents (population)
Q. How would you describe your current or potential involvement in lawn bowls?

THE SIZE OF THE MARKET

- ◆ From these screening questions, we can determine the potential size of the market – i.e. the size of the market that plays lawn bowls or has an interest in lawn bowls. This enables us to review the potential and see where maximum growth can occur.
- ◆ Across Regional Victoria, Sydney, Central Coast, Adelaide and Brisbane, there are just over 4 million people within the ages of 20-65 years.
- ◆ As shown below we spoke to non-members of clubs with an interest in lawn bowls encapsulating three segments in particular... casual play, consider joining or consider playing casually.



INTEREST IN SPORTS

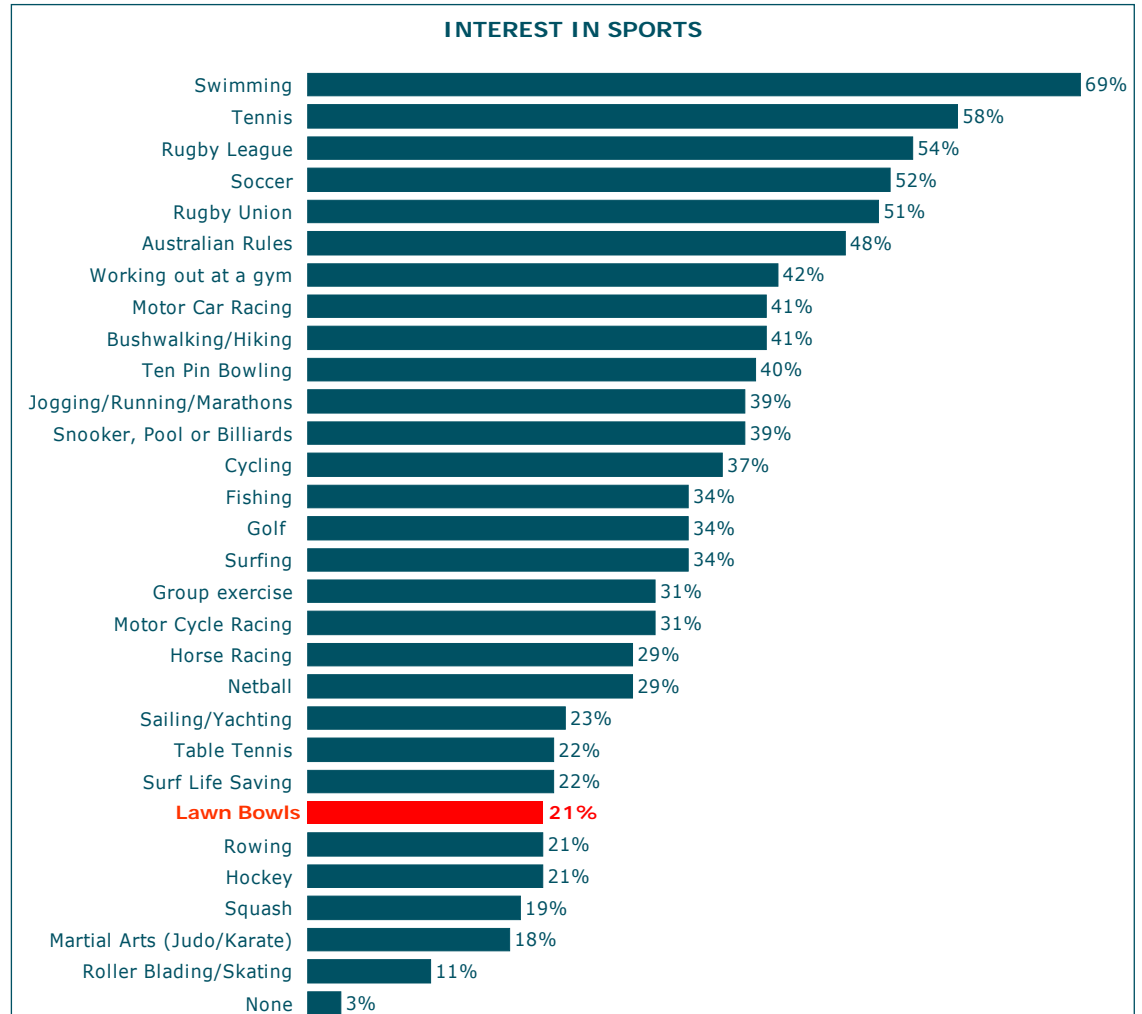
When respondents are asked which sports they are interested in (across the dimensions of participation, attendance, TV viewing etc.) Swimming is most popular, with some seven in ten (69%) keen on the sport. After this comes Tennis (followed by six in ten (58%), then the four football codes...

- ▶ Rugby League (54%)
- ▶ Soccer (52%)
- ▶ Rugby Union (51%); and
- ▶ Australian Rules Football (48%)...

...each of which hold the interest of around one in two people.

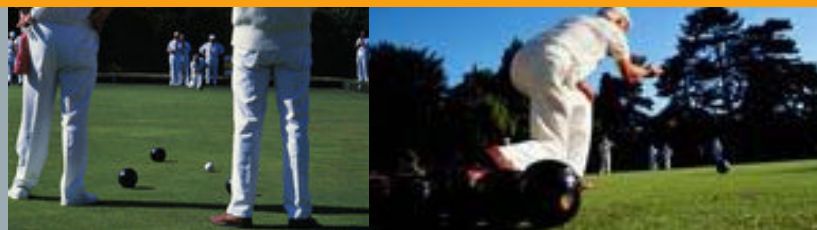
Lawn Bowls ranks 24th out of the 29 sports asked about, with one in five people (21%) having this type of interest in the sport.

Lawn bowls needs to, in the long term, be elevated up this pecking order, as there are significant numbers gravitating towards other sports in preference over a game of bowls.



Base: All respondents (population)

Q. Which of the following sports, if any, are you interested in. that is, participate in yourself, attend as a spectator, watch on TV, listen to in the radio or read about in newspapers?



SECTION TWO: Attitudes Towards Lawn Bowls

ATTITUDES TOWARDS LAWN BOWLS

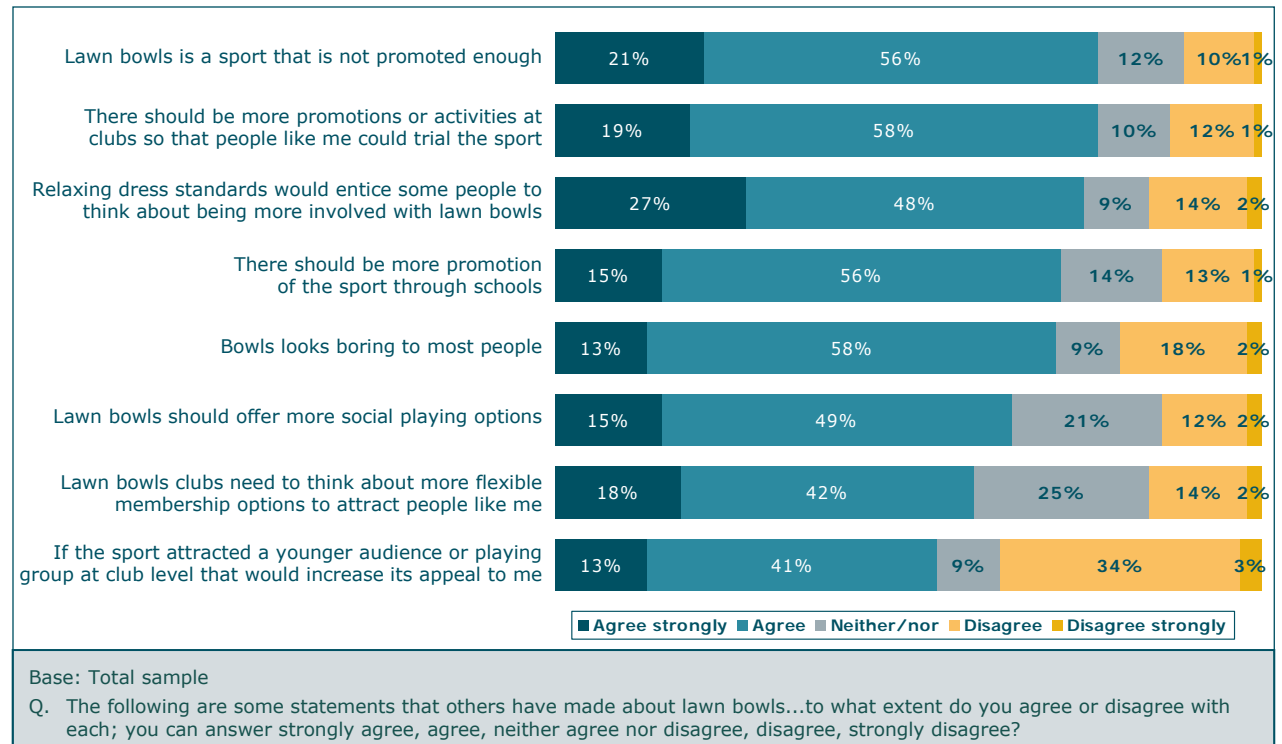
The charts opposite and overleaf illustrate attitudes towards the sport of lawn bowls. The attitudes covered on this page highlight attitudes which have the strongest level of agreement.

Respondents are firmly of the belief that the sport should be promoted more heavily, with at least seven in ten agreeing that...

- ▶ it is not promoted enough (21% strongly agree, 77% agree to some extent)
- ▶ there should be more promotions at clubs so that they can trial the sport (19% strongly agree, 77% agree to some extent); and
- ▶ it should be promoted more in schools (15% strongly agree, 71% agree to some extent).

There is strong support for a number of potential marketing initiatives...

- ▶ Relaxing dress restrictions so that more people would think about becoming involved in the sport (27% strongly agree, 75% agree to some extent)
- ▶ Offering more social playing options (15% strongly agree, 65% agree to some extent); and
- ▶ More flexible membership options to attract people (18% strongly agree, 59% agree to some extent).
- ▶ Some seven in ten people (71%) agree that bowls looks boring to most people, with one in eight overall (13%) strongly agreeing with this assertion.



ATTITUDES TOWARDS LAWN BOWLS (Cont.)

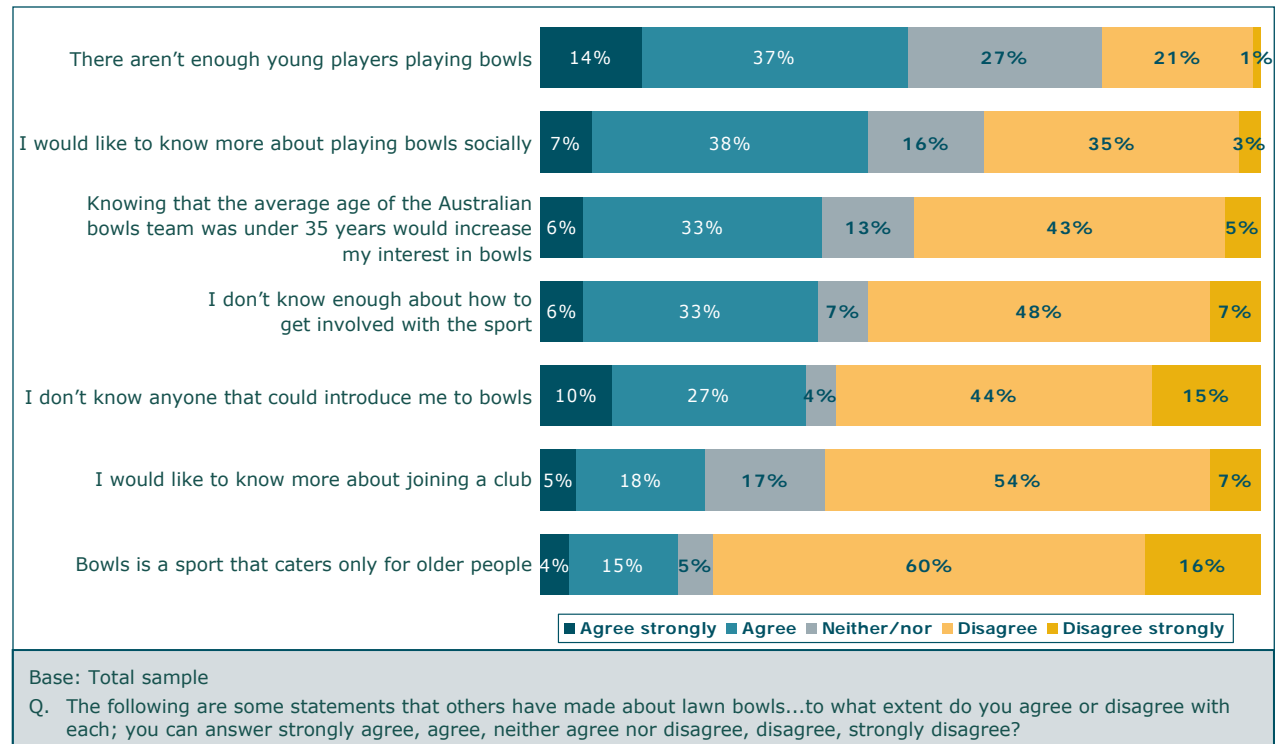
Age is a large factor concerning the image of bowls. While more than half (54%) agree that the appeal of the sport would increase for them if it attracted younger spectators or players, more than one third (37%) disagree with this assertion. However, fewer disagree with the claim that there aren't enough young players playing the game (22% vs 51% agree) and the majority disagree that bowls is a sport for older people only (76% vs 19% agree).

The idea of informing the public about the Australian bowls team having a relatively low average age (under 35 years) may attract more interest in the sport. Although one in two people disagree that this would increase their interest, four in ten (40%) say that the sport would become more attractive to them given this fact. Other findings show...

- While close to half want to know more about playing bowls socially (46%), just half this number (23% overall) want to know more about joining a club.

Two barriers to becoming involved in the sport are...

- Not having enough knowledge about how to become involved in the sport (38% agree that they don't know); and
- Not knowing anyone who could introduce them to the sport (37% agree that they don't know anyone).
- However, more than half disagree that each of these are impediments to their ability to become involved (55% and 59% respectively).



ATTITUDES TOWARDS LAWN BOWLS IN DETAIL (Cont.)

As shown opposite, males and females share similar opinions about lawn bowls, apart from fewer females knowing enough about how to become involved in the sport.

The older respondents are less likely than others to agree with many of the statements, especially in regard to...

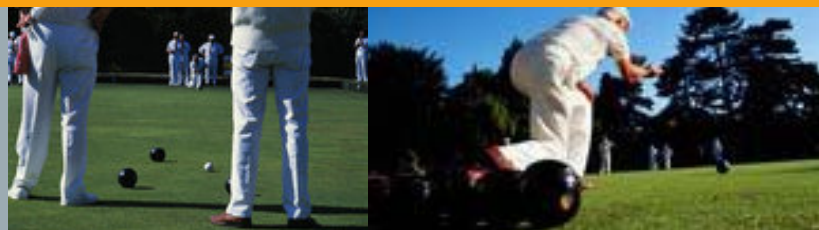
- ▶ Promoting the game enough
- ▶ Introducing promotions and activities at clubs
- ▶ Offering more social playing options
- ▶ Attracting a younger audience or playing group
- ▶ Informing people that the Australian team is relatively young; and
- ▶ Not knowing enough about how to become involved in the sport.

People in their 40s are more likely than others to agree with many of the statements.

% Agree	Total (476) %	Gender		Age			
		Male (213) %	Female (263) %	20-29 (94) %	30-39 (110) %	40-49 (130) %	50-65 (142) %
Lawn bowls is a sport that is not promoted enough	77	80	74	75	79	84	69
There should be more promotions or activities at clubs so that people like me could trial the sport	77	78	76	84	83	77	65
Relaxing dress standards would entice some people to think about being more involved with lawn bowls	75	75	75	68	77	81	73
There should be more promotion of the sport through schools	71	68	74	71	61	82	74
Bowls looks boring to most people	71	71	71	72	69	75	69
Lawn bowls should offer more social playing options	65	66	63	70	66	68	54
Lawn bowls clubs need to think about more flexible membership options to attract people like me	59	63	55	53	57	67	59
If the sport attracted a younger audience or playing group at club level that would increase its appeal to me	54	56	52	55	65	54	40
There aren't enough young players playing bowls	51	48	53	46	48	52	57
I would like to know more about playing bowls socially	46	47	44	49	49	44	42
Knowing that the average age of the Australian bowls team was under 35 years would increase my interest in bowls	40	43	35	45	47	43	22
I don't know enough about how to get involved with the sport	38	32	46	37	38	48	29
I don't know anyone that could introduce me to bowls	37	39	36	35	40	42	31
I would like to know more about joining a club	23	24	23	17	27	27	21
Bowls is a sport that caters only for older people	19	17	22	17	15	23	24

Base: Total sample

Q. The following are some statements that others have made about lawn bowls...to what extent do you agree or disagree with each; you can answer strongly agree, agree, neither agree nor disagree, disagree, strongly disagree?



SECTION THREE: Imagery

ASSOCIATION WITH INDIVIDUAL SPORTS

The table opposite highlights attributes associated with lawn bowls and five other sports (all of which are individual sports or feature small teams). On the following pages we analyse the attributes associated with lawn bowls in detail.

The other sports are characterised as follows...

- ▶ Jogging/walking – **more** closely aligned with convenient, flexible, relaxing, good for fitness, easy to learn, appealing to all cultures...but it is **less** about being competitive, an elite sport, expensive to do, hard to get a membership, skilful, expensive to join, having strict rules and regulations, old fashioned, part of our sporting heritage, strategic
- ▶ Golf – **more** commonly associated with popular, social, elite, hard to get a membership, mentally challenging, skilful, expensive to join, having strict rules and regulations and strategic...but it is **less** about being convenient, flexible, easy to learn or play or a family game
- ▶ Tennis – **seen** as competitive, popular, fun and social...but it is **less** about convenient, flexible, relaxing, aimed at retirees or boring
- ▶ Swimming – **is often** about being popular, fun, relaxing, good for fitness, part of our sporting heritage...but it is **less** about social, hard to get a membership, expensive to join, having a strict dress code, aimed at retirees, old fashioned, boring or strategic; and
- ▶ Cycling – **good** for fitness...but it is **less** about being social, hard to get a membership, mentally challenging, expensive to join, having a strict dress code, aimed at retirees, old fashioned, boring.

	Jogging/ Walking %	Golf %	Tennis %	Lawn bowls %	Swimming %	Cycling %
Competitive	39	69	79	61	70	67
Convenient	84	18	25	22	47	41
Popular	51	62	65	29	64	42
Flexible	79	22	23	19	51	43
Fun	55	56	70	59	67	58
Social	40	70	69	73	28	32
An elite sport	17	60	50	16	39	43
Expensive to do/play	1	83	21	9	5	28
Hard to get a membership	1	57	12	16	1	3
Mentally challenging	20	71	49	52	24	0
Skilful	14	83	72	68	32	34
Expensive to join	1	85	21	6	4	10
Relaxing/stress relief	62	48	31	47	60	36
Good for fitness	85	49	67	39	82	74
Easy to learn or play	79	21	37	41	48	47
For the family	53	17	51	25	54	49
Has strict dress code	1	58	26	72	8	8
Has strict rules and regulations	7	75	45	64	19	20
Aimed at retirees	23	53	12	84	9	3
Old fashioned	4	25	13	65	4	3
Boring	24	27	7	25	11	11
Appeals to all cultures	59	46	47	26	50	38
Is part of our sporting heritage	20	29	60	31	70	26
Strategic	11	56	43	61	18	27

Base: Total sample

Q. I am going to read a series of statements that people have made about a number of sports...tell me the sport or sports that you associate with each?

ASSOCIATION WITH LAWN BOWLS

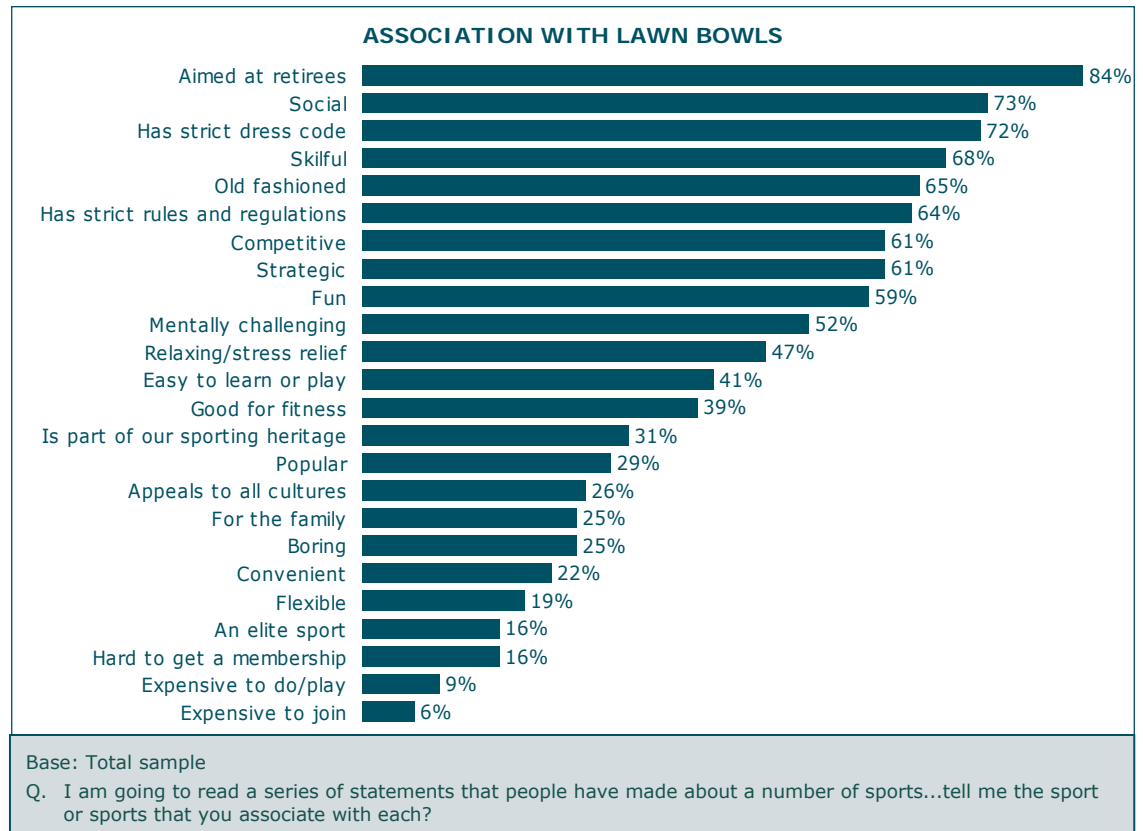
The chart illustrates the extent to which each of the attributes are associated with lawn bowls. The chart shows that nine of the attributes are cited by around six in ten or more people.

However, the table on the previous page shows that six of these attributes set lawn bowls apart from the other sports (or at least all but one of them)...

- ▶ Aimed at retirees
- ▶ Social (along with golf and tennis)
- ▶ Has strict dress code
- ▶ Old fashioned
- ▶ Has strict rules and regulations (along with golf); and
- ▶ Strategic (along with golf).

The sport's other main attributes are often more readily associated with other sports – skilful (golf), competitive (tennis) and fun (tennis and swimming).

Encouragingly, the attributes least aligned with lawn bowls relate to cost, exclusivity and flexibility/convenience. However, four attributes which lawn bowls would like to be associated with have a weak connection to the sport – for the family, appeals to all cultures, popular and part of our sporting heritage.



ASSOCIATION WITH LAWN BOWLS IN DETAIL

The tables opposite and overleaf examine associations of attributes with lawn bowls in more detail.

As shown, younger people are far less likely than others to attach just about all of lawn bowls' main attributes to the sport.

The two middle age groups each have a high propensity to pin certain labels on the sport...

- ▶ 30-39 year olds – social, strategic, fun, mentally challenging and relaxing; and
- ▶ 40-49 year olds – strict dress code, old fashioned, strict rules and regulations, competitive, strategic, and relaxing...

...while older people are especially likely to see the sport as skilful and competitive.

More males than females see the sport as strategic, fun, mentally challenging, relaxing and easy to play.

% Agree	Total (476) %	Gender		Age			
		Male (213) %	Female (263) %	20-29 (94) %	30-39 (110) %	40-49 (130) %	50-65 (142) %
Aimed at retirees	84	83	84	81	88	85	79
Social	73	73	73	53	85	73	74
Has strict dress code	72	71	74	56	72	81	77
Skilful	68	68	68	44	72	74	79
Old fashioned	65	65	65	71	65	71	52
Has strict rules and regulations	64	64	65	49	63	77	65
Competitive	61	62	61	42	59	69	72
Strategic	61	66	56	52	74	70	44
Fun	59	62	56	41	76	55	60
Mentally challenging	52	55	48	30	60	57	54
Relaxing/stress relief	47	52	40	26	64	64	46
Easy to learn or play	41	47	34	45	44	39	42

Base: Total sample
 Q. I am going to read a series of statements that people have made about a number of sports...tell me the sport or sports that you associate with each?

ASSOCIATION WITH LAWN BOWLS IN DETAIL (Cont.)

On the attributes less readily associated with lawn bowls, females are more likely than males to adjudge the sport good for fitness. However, apart from this, their opinion of the sport is considerably more negative than males.

Females are...

- ▶ More likely to see it as boring, and expensive to play or join up; and
- ▶ Less likely to see it as convenient and part of our sporting heritage.

The fitness aspect of the sport is likely to be emphasised as people get older, with the over 50s least likely to see the sport as boring, elite, or to believe it is hard to acquire a membership.

Although relatively few people deem the sport convenient, the under 30s are particularly unlikely to see the sport this way.

% Agree	Total (476) %	Gender		Age			
		Male (213) %	Female (263) %	20-29 (94) %	30-39 (110) %	40-49 (130) %	50-65 (142) %
Good for fitness	39	32	46	24 →	36 →	42 →	51
Is part of our sporting heritage	31	36	24	25	31	36	30
Popular	29	29	28	18 →	28 →	33 →	34
For the family	25	24	27	30	27	24	20
Appeals to all cultures	26	25	28	20	34	18	30
Boring	25	21	31	29	26	32	16
Convenient	22	28	15	12	26	23	25
Flexible	19	20	18	18	22	18	18
An elite sport	16	13	19	14	19	17	11
Hard to get a membership	16	15	18	16	22	16	9
Expensive to do/play	9	6	12	6	7	7	15
Expensive to join	6	4	9	3	6	11	5

Base: Total sample
 Q. I am going to read a series of statements that people have made about a number of sports...tell me the sport or sports that you associate with each?

ASSOCIATION WITH LAWN BOWLS VS JOGGING/WALKING

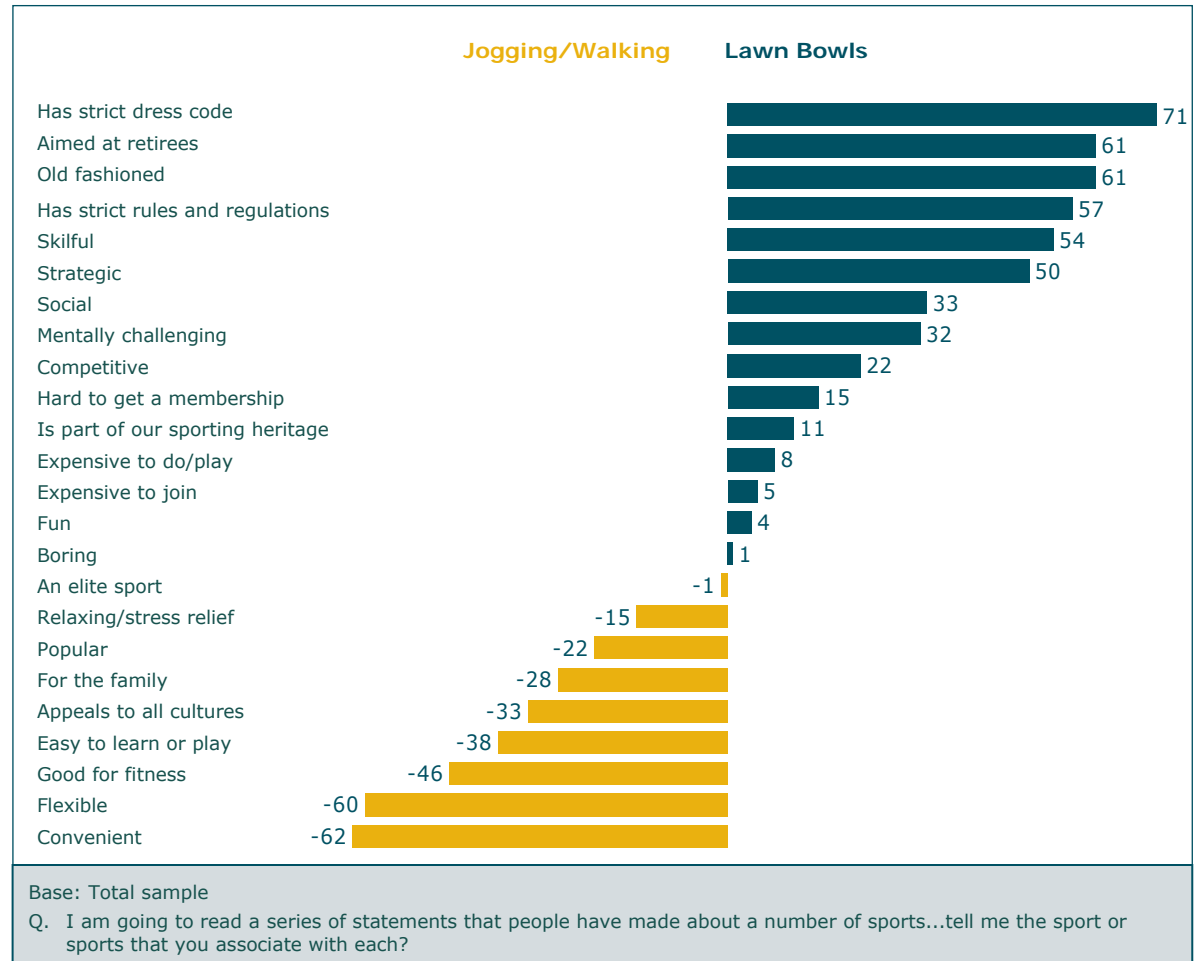
Over the next few pages lawn bowls is compared with each of the other sports on a one-on-one basis.

When compared to jogging or walking lawn bowls is far more likely to be associated with a number of attributes which are either negative or at least suggestive of a limited appeal for the sport...

- ◆ Strict dress code
- ◆ Aimed at retirees
- ◆ Old fashioned; and
- ◆ Having strict rules and regulations.

However, it is also clearly ahead in terms of being skilful, strategic and social, mentally challenging and competitive.

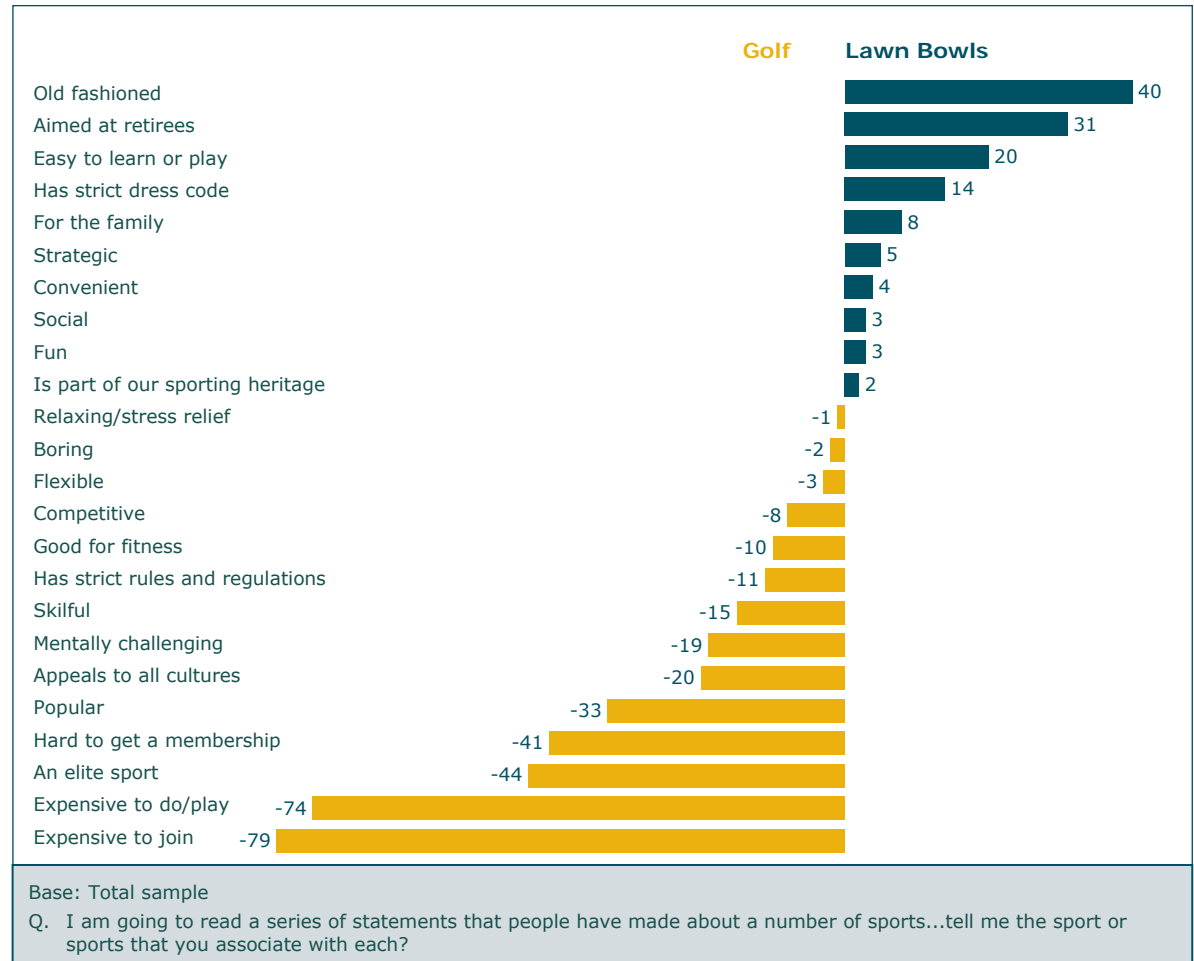
Jogging and walking are perceived to be a long way ahead in regard to being convenient or flexible, as well as good for fitness, easy to do, appealing to all cultures and being family-friendly.



ASSOCIATION WITH LAWN BOWLS VS GOLF

Lawn bowls does not noticeably win out ahead of golf in many areas, apart from being **less** likely to be thought of as expensive or difficult to secure a membership.

Far more people see lawn bowls as old fashioned and aimed at retirees, while more rate golf as an elite sport and claim it is popular.



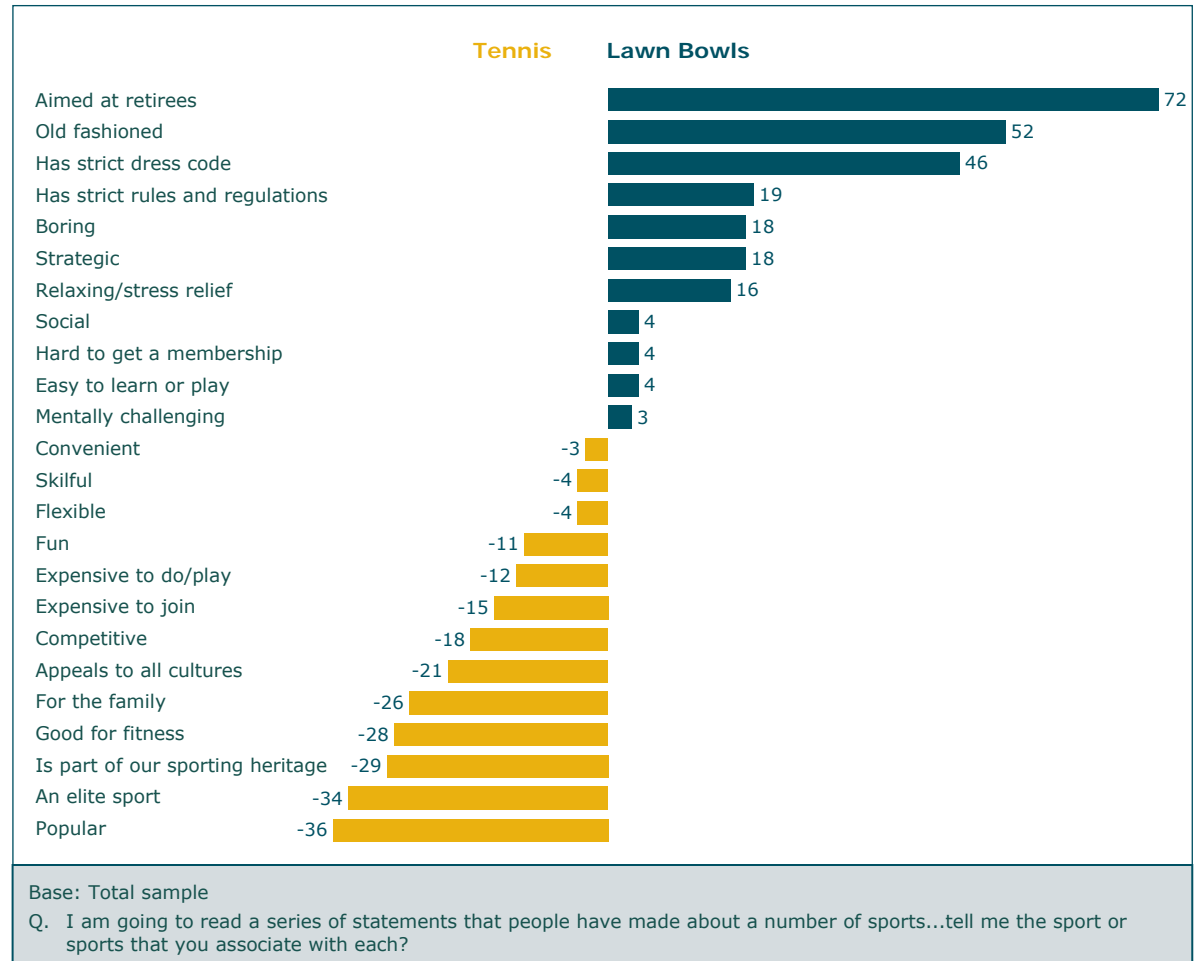
ASSOCIATION WITH LAWN BOWLS VS TENNIS

Lawn bowls is considered a poor relation compared with tennis. It is far more likely than the racket sport to be considered...

- ◆ Aimed at retirees
- ◆ Old fashioned; and
- ◆ Having a strict dress code...

...while being less likely to be seen as...

- ◆ Popular
- ◆ An elite sport
- ◆ Part of our sporting heritage
- ◆ Good for fitness
- ◆ A family sport; and
- ◆ Appealing to all cultures.



ASSOCIATION WITH LAWN BOWLS VS SWIMMING

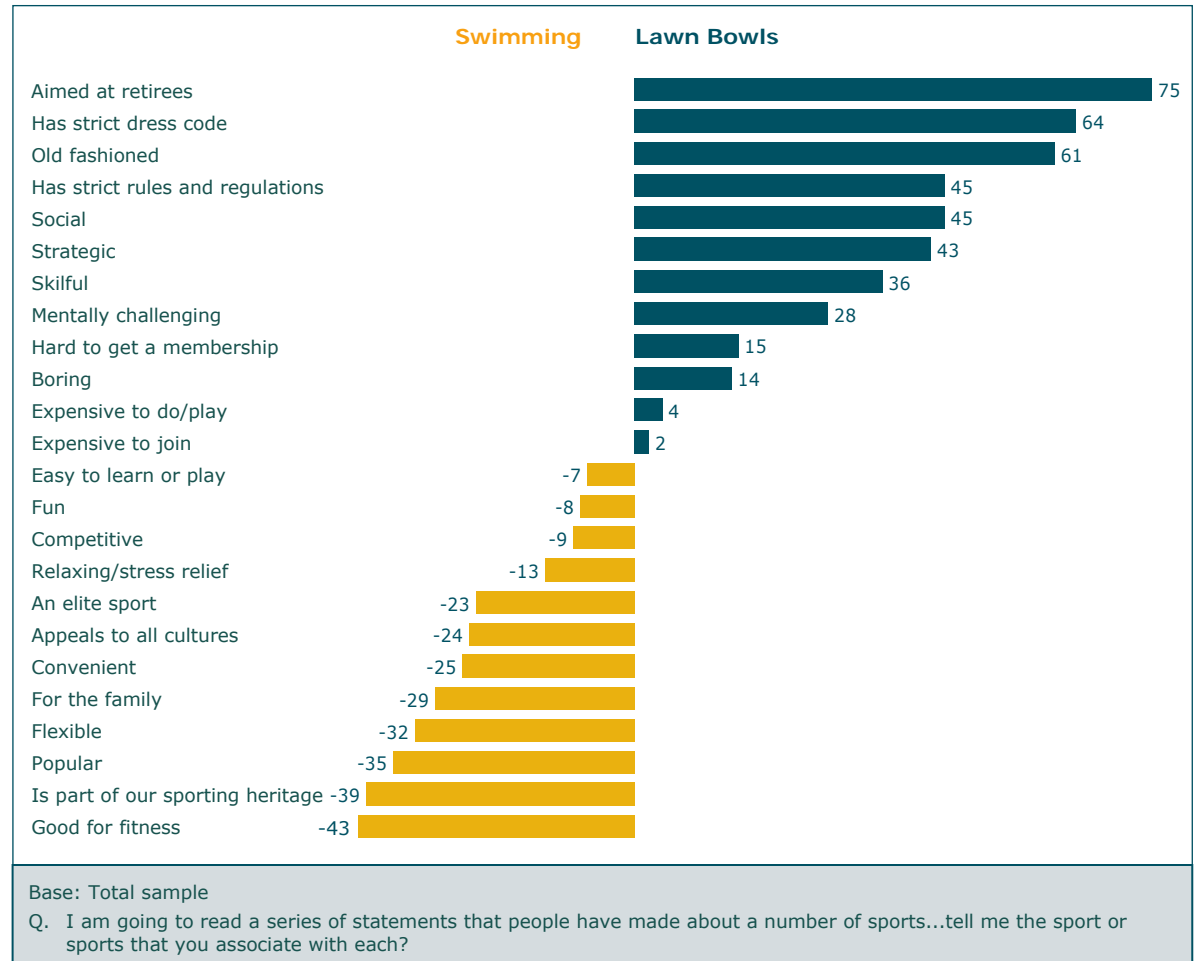
Lawn Bowls' association with swimming is similar to its status in comparison to jogging or walking. Lawn bowls is much more likely than swimming to be linked with a number of attributes which are either negative or at least suggest a limited appeal for the sport...

- ◆ Aimed at retirees
- ◆ Strict dress code
- ◆ Old fashioned; and
- ◆ Having strict rules and regulations.

As with the comparison with jogging and walking, lawn bowls is also clearly ahead in terms of being social, strategic, skilful and mentally challenging.

Swimming is also perceived as being a well ahead in regard to being good for fitness, popular, convenient or flexible, family-friendly and appealing to all cultures.

However, unlike jogging and walking, swimming is also well ahead of lawn bowls in terms of being an elite sport and being part of Australia's sporting heritage.



ASSOCIATION WITH LAWN BOWLS VS CYCLING

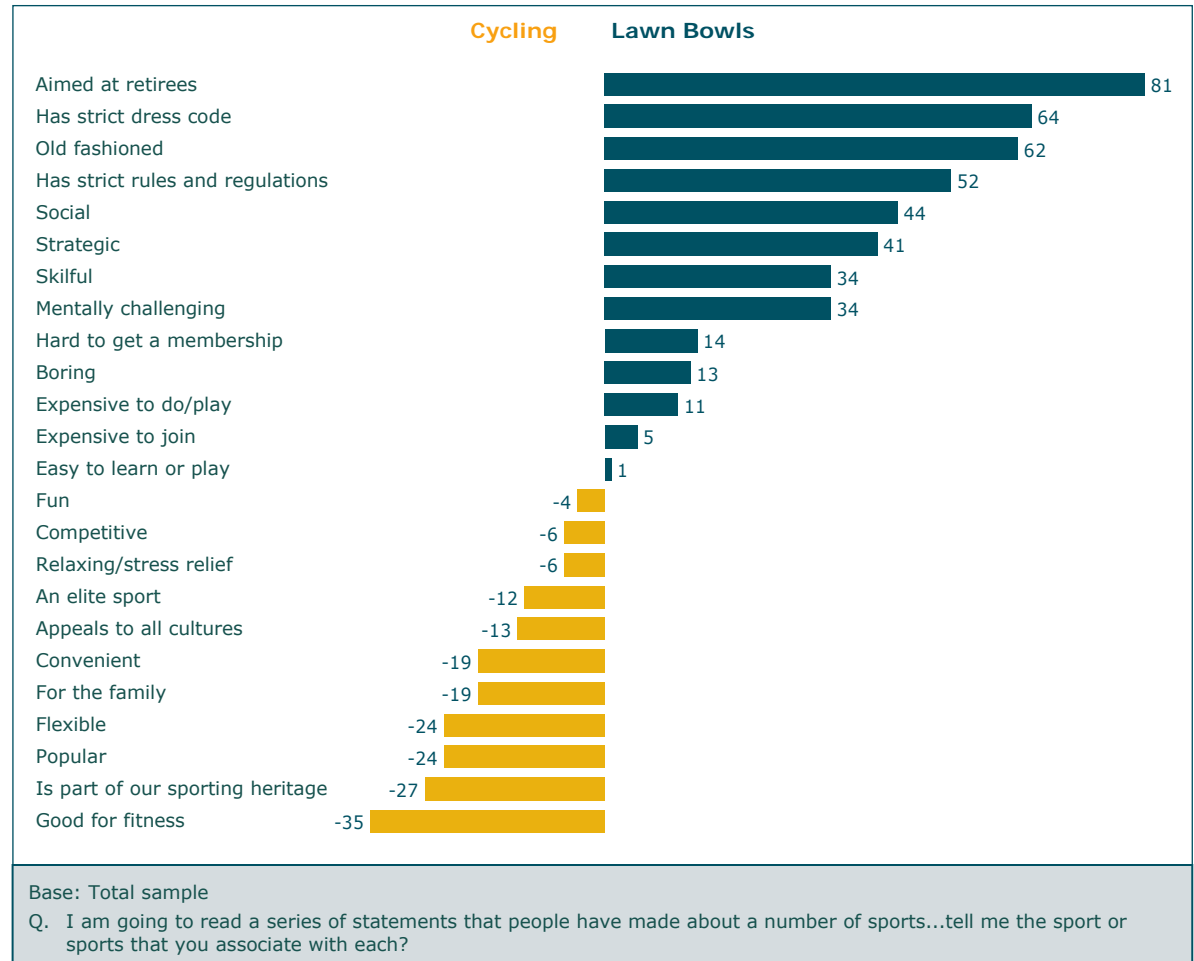
Lawn bowls compares with cycling in a similar way to which it compares with jogging/walking and swimming. Bowls is more likely than the two-wheeled sport to be perceived as...

- ◆ Aimed at retirees
- ◆ Strict dress code
- ◆ Old fashioned; and
- ◆ Having strict rules and regulations...

...but also to be seen as social, skilful, strategic, and mentally challenging.

However, far more people see cycling as...

- ◆ Good for fitness
- ◆ Part of Australia’s sporting heritage
- ◆ Popular; and
- ◆ Flexible.



BRAND MAP – Overview

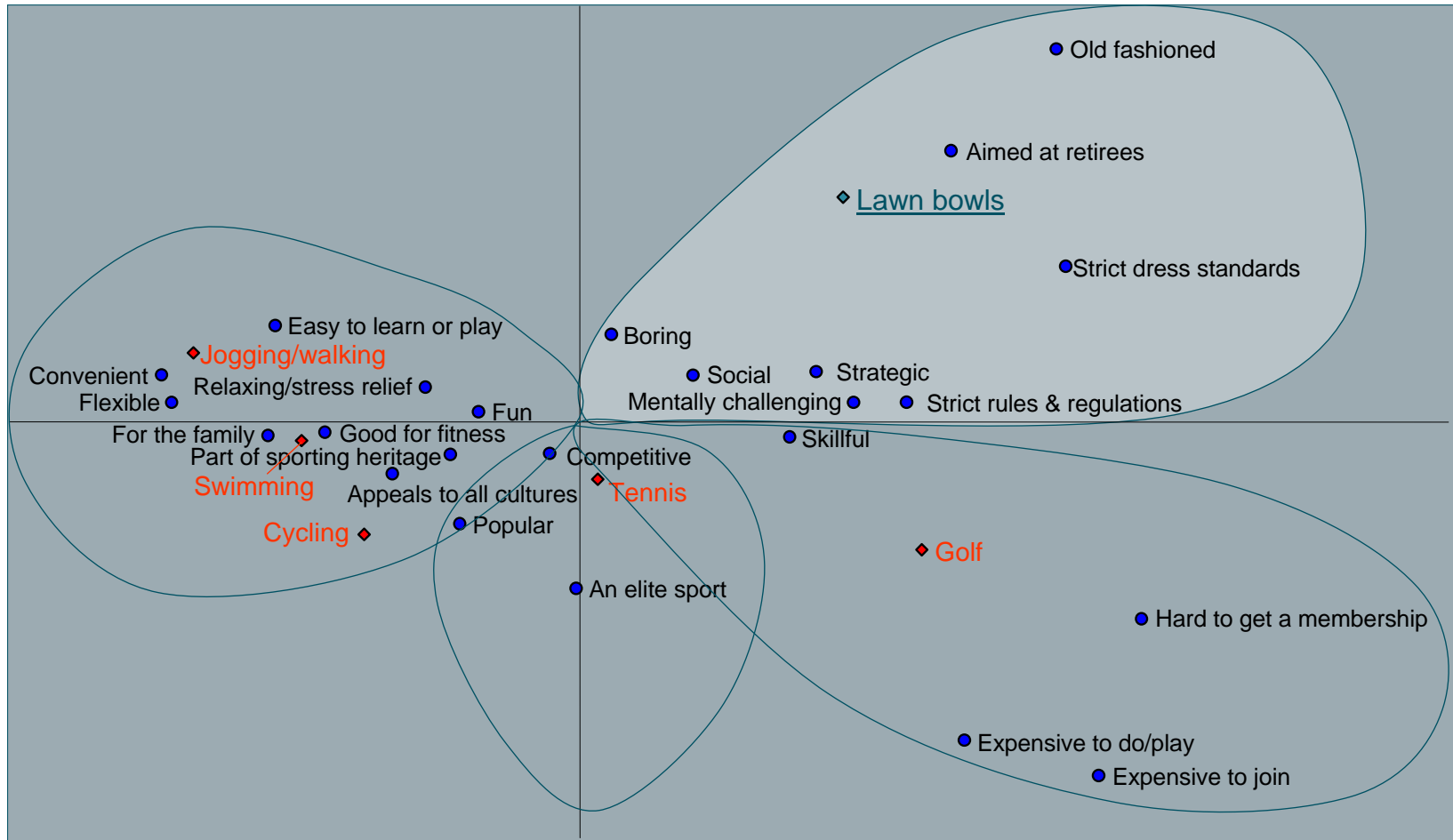
The brand maps that appear on the next two pages endeavour to give you a visual representation of how each of the sports are 'positioned' in the market – relative to each other.

As indicted by the members, and shown in brand map (1), lawn bowls sits in a quadrant by itself, with a close association with old fashioned, aimed at retirees and strict dress standards – there is also secondary associations with being social, strategic, intellectually challenging – as well as boring and strict rules and regulations.

It has its own unique positioning.

The 2nd Brand map (intended) highlights (perceptually) where lawn bowls has come from in 1998 – and where the different products need to move towards as the game and administration develops.

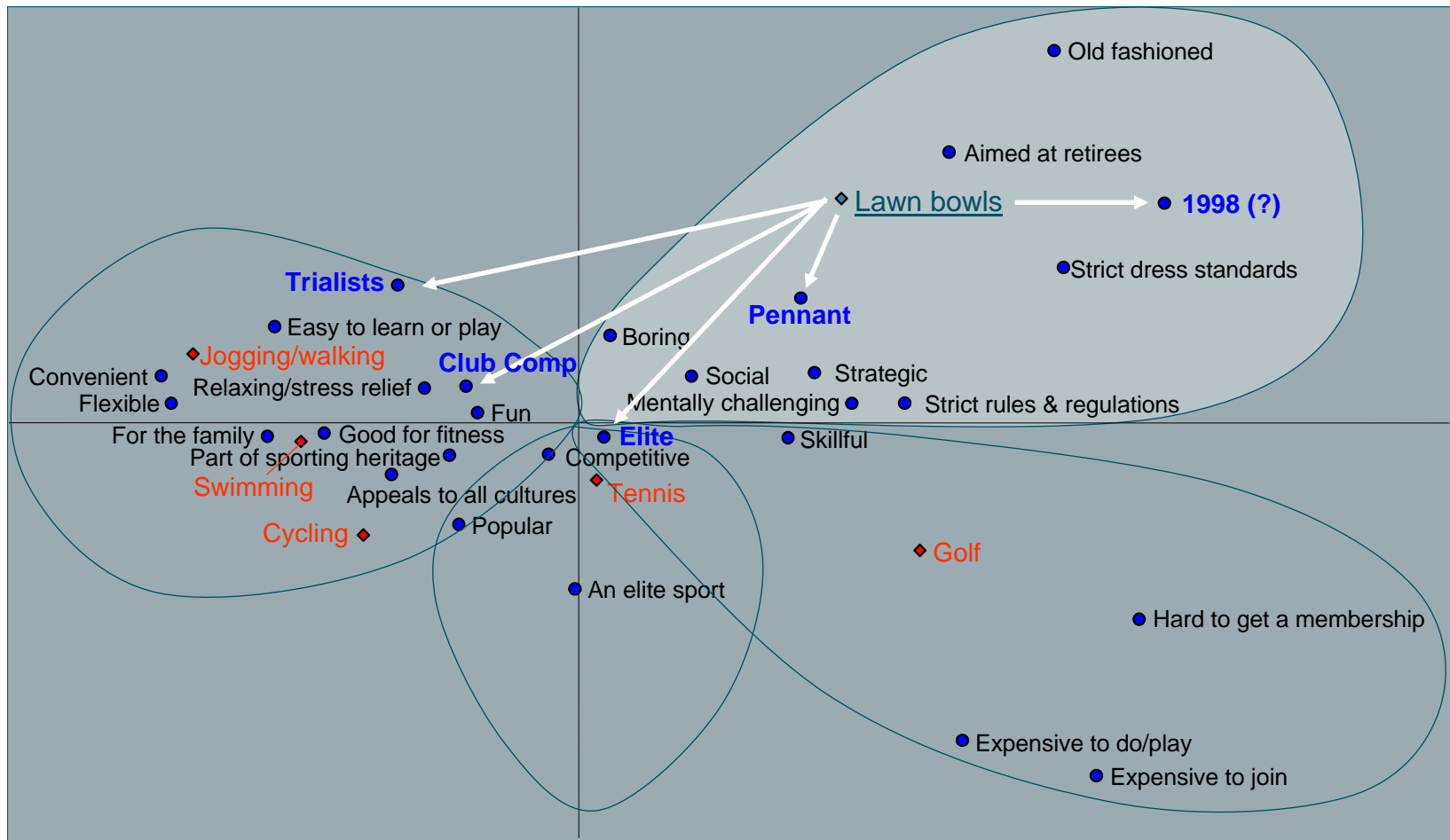
BRAND MAP (1) – Current Position



Base: Total sample

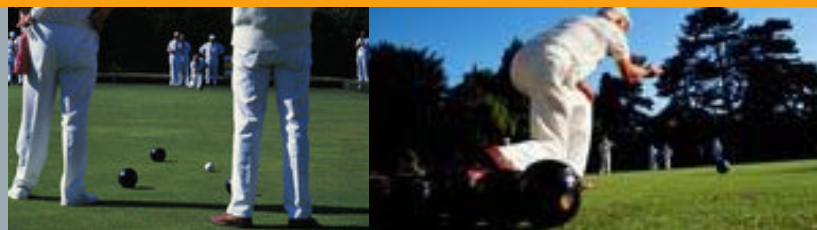
Q. I am going to read a series of statements that people have made about a number of sports...tell me the sport or sports that you associate with each?

BRAND MAP (2) – Intended



Base: Total sample

Q. I am going to read a series of statements that people have made about a number of sports...tell me the sport or sports that you associate with each?



SECTION FOUR: Initiatives

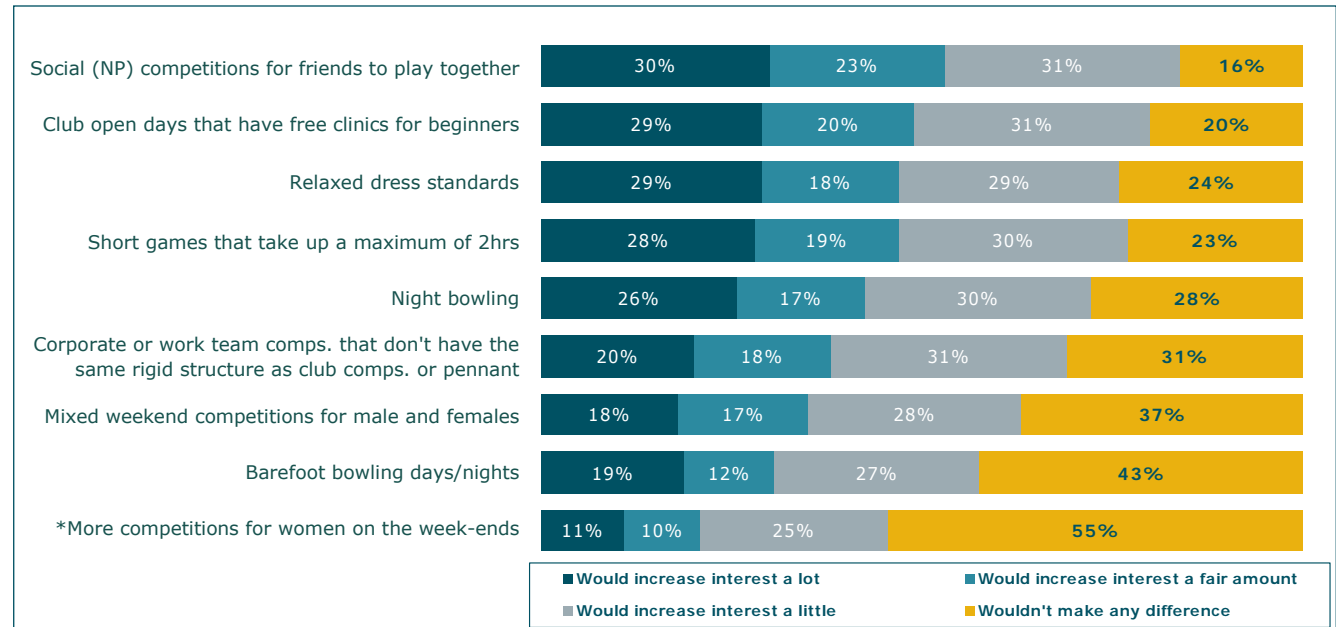
IMPACT OF INITIATIVES

Respondents were read out a list of nine initiatives, and asked to what extent these would encourage them to get involved in lawn bowls if these ideas were introduced by Bowls Australia. Four of these initiatives appeal to the extent that half of them think their interest would increase at least a fair amount if they were brought in, and around three in ten claiming that their interest would increase a lot...

- ◆ Social competitions for friends to play together
- ◆ Club open days that have free clinics for beginners
- ◆ Relaxed dress standard; and
- ◆ Short games which go for no more than two hours.

Night bowling is the next most popular initiative followed by corporate/work team competitions, mixed weekend competitions and finally barefoot bowling days or nights. Fewer than four in ten think that the last three ideas would help increase their interest in the sport a lot or a fair amount.

Surprisingly, few females would readily welcome more competitions on the weekend for women (20% interest increase at least a fair amount).



Base: Total sample

Note: * asked of females only

Q. I am going to read out some initiatives that could potentially be used by Bowls Australia to encourage you to get involved in the sport. What impact do you think each one may have on your potential to be involved? As you read each one could you please tell us what impact each one may have on you to encourage you to trial or play bowls in the future.

IMPACT OF INITIATIVES IN DETAIL

As shown in the table opposite, males and females are equally receptive of all the initiatives, apart from night bowling and relaxed dress standards, which males are more likely to favour.

All of the initiatives are particularly unlikely to increase interest significantly amongst the over 50s, with those in their 30s more likely than others to be attracted to most of the ideas.

Barefoot bowling, which is not particularly popular with most age groups would be the joint second most effective initiative among the under 30s – perhaps not surprisingly.

(% Increase interest a fair amount/a lot)	Total (476) %	Gender		Age			
		Male (213) %	Female (263) %	20-29 (94) %	30-39 (110) %	40-49 (130) %	50-65 (142) %
Social competitions for friends to play together	53	53	53	60 ←	58 ←	48 ←	45 ←
Club open days that have free clinics for beginners	49	50	49	39	56	53	47
Relaxed dress standards	47	50	43	47	47	52	41
Short games that take up a maximum of 2 hours	47	48	47	46	56	38	48
Night bowling	43	48	38	47	51	38	35
Corporate or work team competitions that don't have the same rigid structure as club competitions or pennant	38	40	36	42	46	34	29
Mixed weekend competitions for males and females	35	37	33	33	47	30	28
Barefoot bowling days/nights	31	32	29	47	28	33	18
* More competitions for women on the weekends	N/A	N/A	20	15	18	21	27

Base: Total sample

Note: *asked of females only

Q. I am going to read out some initiatives that could potentially be used by Bowls Australia to encourage you to get involved in the sport. What impact do you think each one may have on your potential to be involved? As you read each one could you please tell us what impact each one may have on you to encourage you to trial or play bowls in the future.

IMPACT OF INITIATIVES - ADDITIONAL DETAIL

Amongst the various segments there are some nuances including...

- ▶ All of the initiatives tend to resonate more with current occasional/ casual players and potential members... than with potential casual or non-pennant players

	Total (476) %	Current occasional players (75) %	Potential members (156) %	Potential NP** players (304) %
(% Increase interest a fair amount/a lot)				
Social competitions for friends to play together	53	65	63	48
Club open days that have free clinics for beginners	49	56	66	42
Relaxed dress standards	47	55	61	42
Short games that take up a maximum of 2 hours	47	53	62	42
Night bowling	43	48	53	38
Corporate or work team competitions that don't have the same rigid structure as club competitions or pennant	38	45	43	35
Mixed weekend competitions for males and females	35	45	47	28
Barefoot bowling days/nights	31	45	34	30
* More competitions for women on the weekends	20	10	40	11

Base: Total sample

Note: *asked of females only; **= non pennant

Q. I am going to read out some initiatives that could potentially be used by Bowls Australia to encourage you to get involved in the sport. What impact do you think each one may have on your potential to be involved? As you read each one could you please tell us what impact each one may have on you to encourage you to trial or play bowls in the future.

PREFERENCES FOR INITIATIVES

Respondents were then asked which of these initiatives would be their first preference, in regard to encouraging them to get involved in lawn bowls, and which would be their second choice.

Social competitions for friends to play together comes out as the most popular idea, leading the others in terms of first preferences and top two preferences.

The next two leading options are...

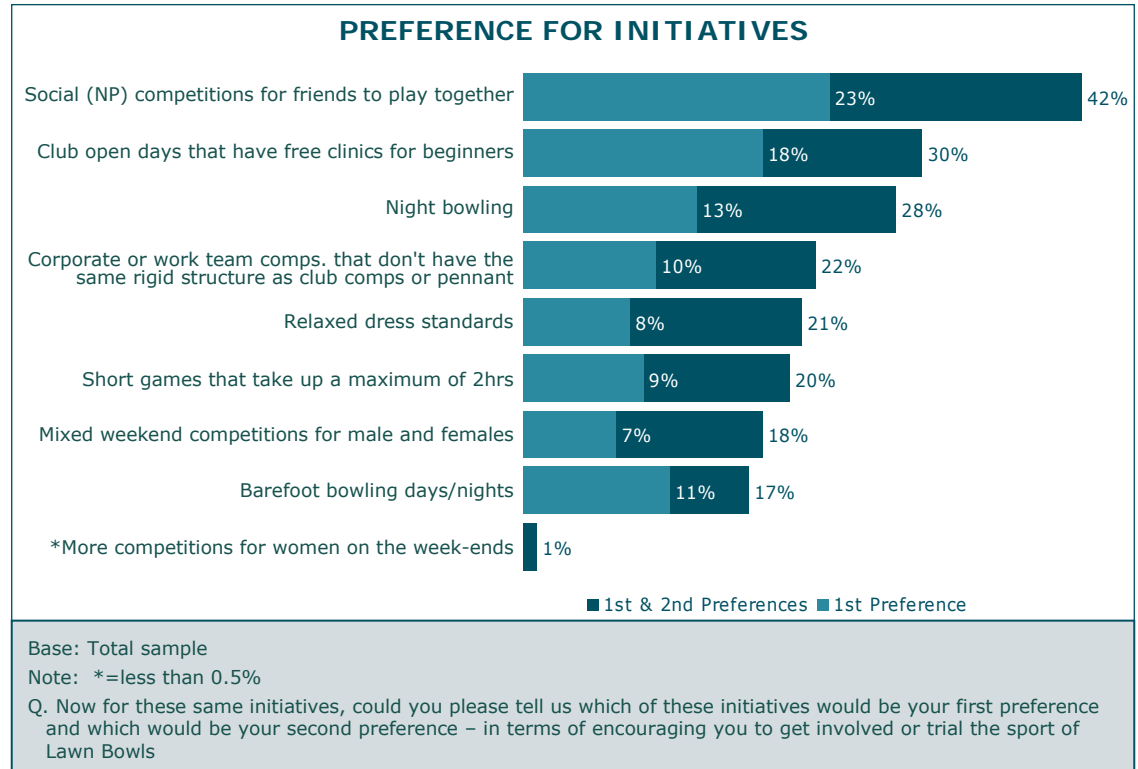
- ◆ Club open days that have free clinics for beginners; and
- ◆ Night bowling.

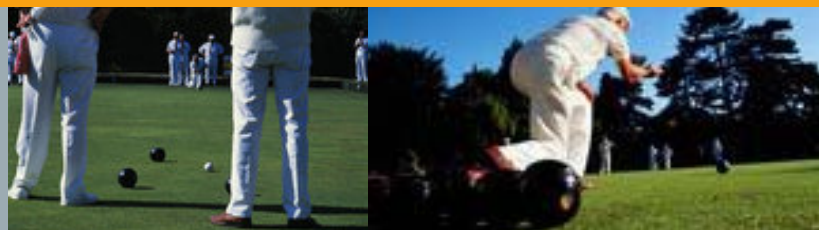
There is little to choose between the next three options...

- ◆ Corporate/work team competitions
- ◆ Relaxed dress standard; and
- ◆ Short games which go for no more than two hours...

...with mixed weekend competitions and barefoot bowling days or nights not far behind. Indeed the latter initiative has the fourth highest number of first preference 'votes'.

Increasing the number of weekend competitions for woman has little appeal (even amongst females!).



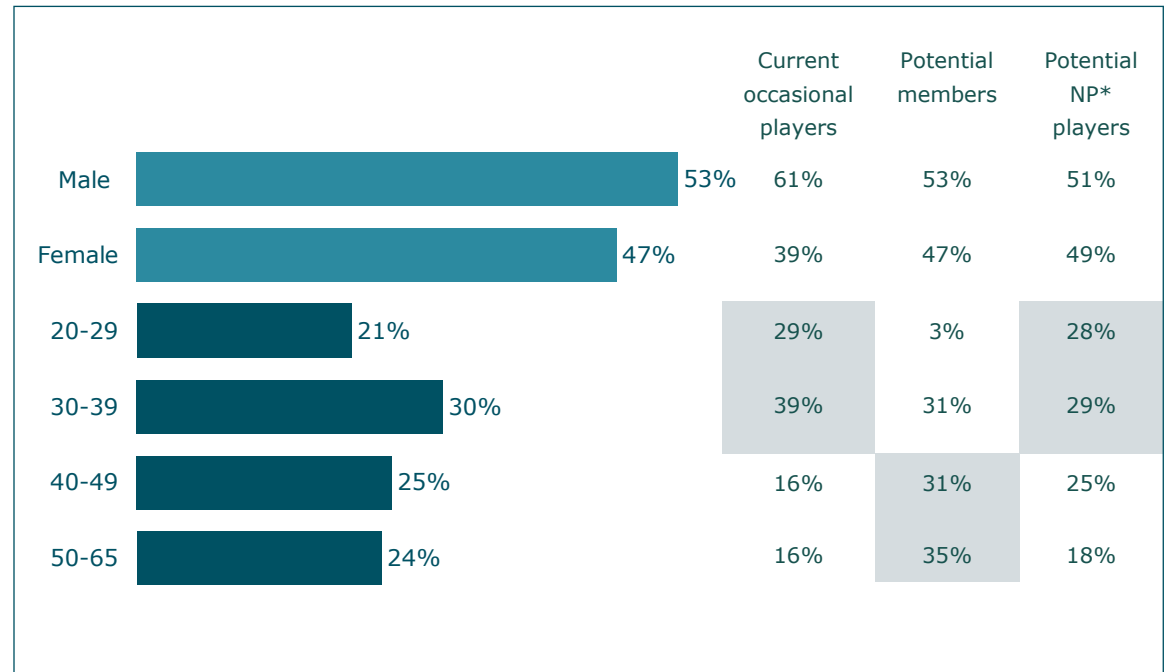


SECTION FIVE: Profile of Occasional, Potential Members & Potential Non-Pennant Members

DEMOGRAPHIC PROFILE

Further analysis of the profile of the key segments shows...

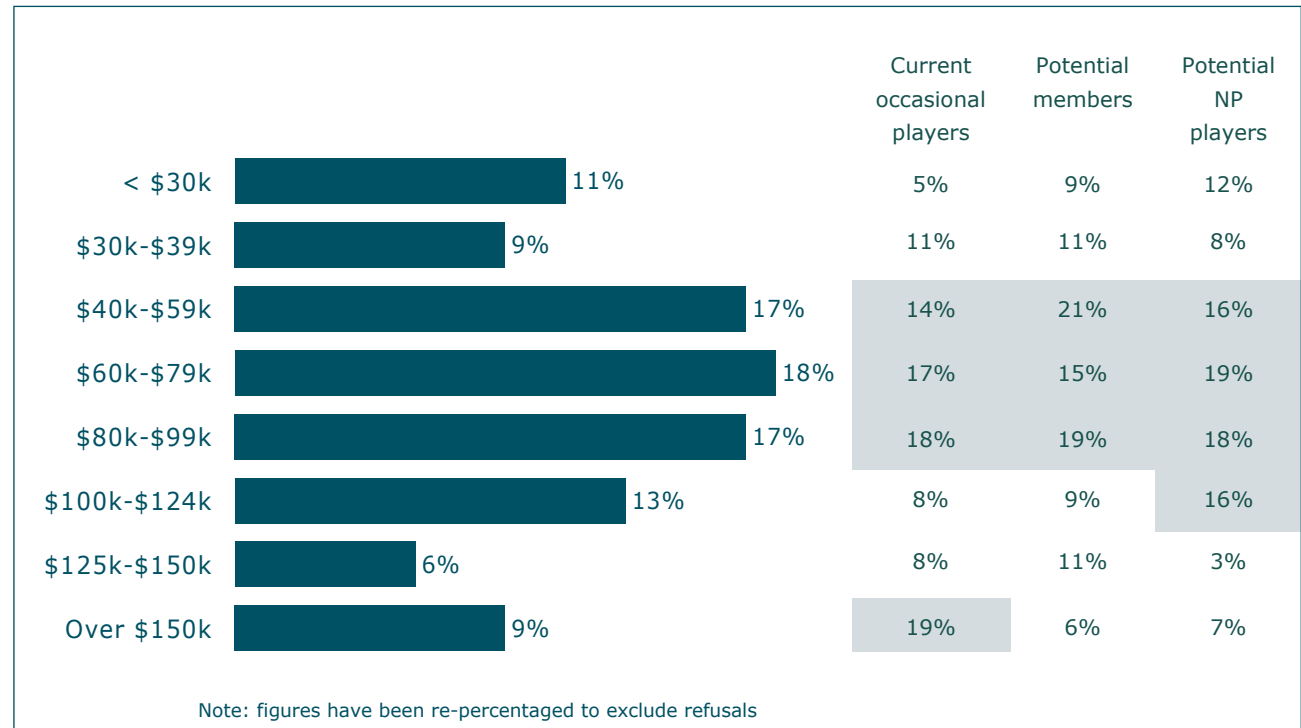
- ◆ Current casual players have a heavier bias towards males than potential members or other potential players
- ◆ In terms of age skews, current occasional players and potential players are more likely to come from the under 40's, while potential members are most likely to come from the 50 pluses.



HOUSEHOLD INCOME

As we highlighted at the beginning, the income spread of those potentially involved in Bowls shows that the sport has a wide demographic base. Further analysis shows;

- ◆ Current occasional players are the most likely segment to have income over \$150k
- ◆ Potential non-pennant players income is spread predominately across a wide range of \$40k-\$125k



INTEREST IN SPORTS

Additional analysis of current occasional players shows above average interest in the following sports...

- ◆ Tennis (65%) (vs 58% overall)
- ◆ Ten Pin Bowling (49%) (vs 40%)
- ◆ Cycling (50%) (vs 37%)
- ◆ Fishing (49%) (vs 34%); and
- ◆ Lawn Bowls (49%)(vs 21%).

Potential members do not display above average interest in any of the sports with the exception of Lawn Bowls (27%).

The sporting interest levels of potential non-pennant players are similar to that of the total sample.

VENUES OR EVENTS ATTENDED IN PAST 12 MONTHS

In the past 12 months, current occasional players were more likely than average to have attended the following venues or events...

- ◆ Museum (59%) (vs 50% overall)
- ◆ Art gallery (58%) (vs 49%)
- ◆ NRL Football (48%) (vs 35%)
- ◆ International Test Cricket (27%) (vs 19%)
- ◆ International One Day Cricket (25%) (vs 17%); and
- ◆ Soccer/A-League (20%)(vs 13%).

Both potential members and potential non-pennant players appear to have similar attendance levels at particular venues or events to the total sample.

ATTITUDES TOWARDS LAWN BOWLS

Further segment analysis appears below...

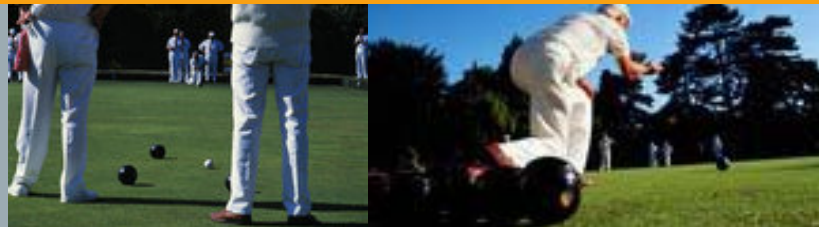
% Agree	Total (476) %	Current casual players (75) %	Potential members (156) %	Potential casual players (304) %
Lawn bowls is a sport that is not promoted enough	77	77	85	76
There should be more promotions or activities at clubs so that people like me could trial the sport	77	81	82	76
Relaxing dress standards would entice some people to think about being more involved with lawn bowls	75	78	87	71
There should be more promotion of the sport through schools	71	61	82	70
Bowls looks boring to most people	71	70	70	71
Lawn bowls should offer more social playing options	65	75	73	63
Lawn bowls clubs need to think about more flexible membership options to attract people like me	59	57	67	57
If the sport attracted a younger audience or playing group at club level that would increase its appeal to me	54	58	57	53
Base: Total sample Q. The following are some statements that others have made about lawn bowls...to what extent do you agree or disagree with each; you can answer strongly agree, agree, neither agree nor disagree, disagree, strongly disagree?				

ATTITUDES TOWARDS LAWN BOWLS (Cont.)

Further analysis appears below...

% Agree	Total (476) %	Current casual players (75) %	Potential members (156) %	Potential casual players (304) %
There aren't enough young players playing bowls	51	45	60	48
I would like to know more about playing bowls socially	46	55	59	42
Knowing that the average age of the Australian bowls team was under 35 years would increase my interest in bowls	40	46	46	37
I don't know enough about how to get involved with the sport	38	22	36	40
I don't know anyone that could introduce me to bowls	37	15	35	41
I would like to know more about joining a club	23	33	46	15
Bowls is a sport that caters only for older people	19	23	23	18
Base: Total sample Q. The following are some statements that others have made about lawn bowls...to what extent do you agree or disagree with each; you can answer strongly agree, agree, neither agree nor disagree, disagree, strongly disagree?				

APPENDIX



Background Data

This Data Forms Some Background & Additional Data on the Respondents

VENUES OR EVENTS ATTENDED IN PAST 12 MONTHS

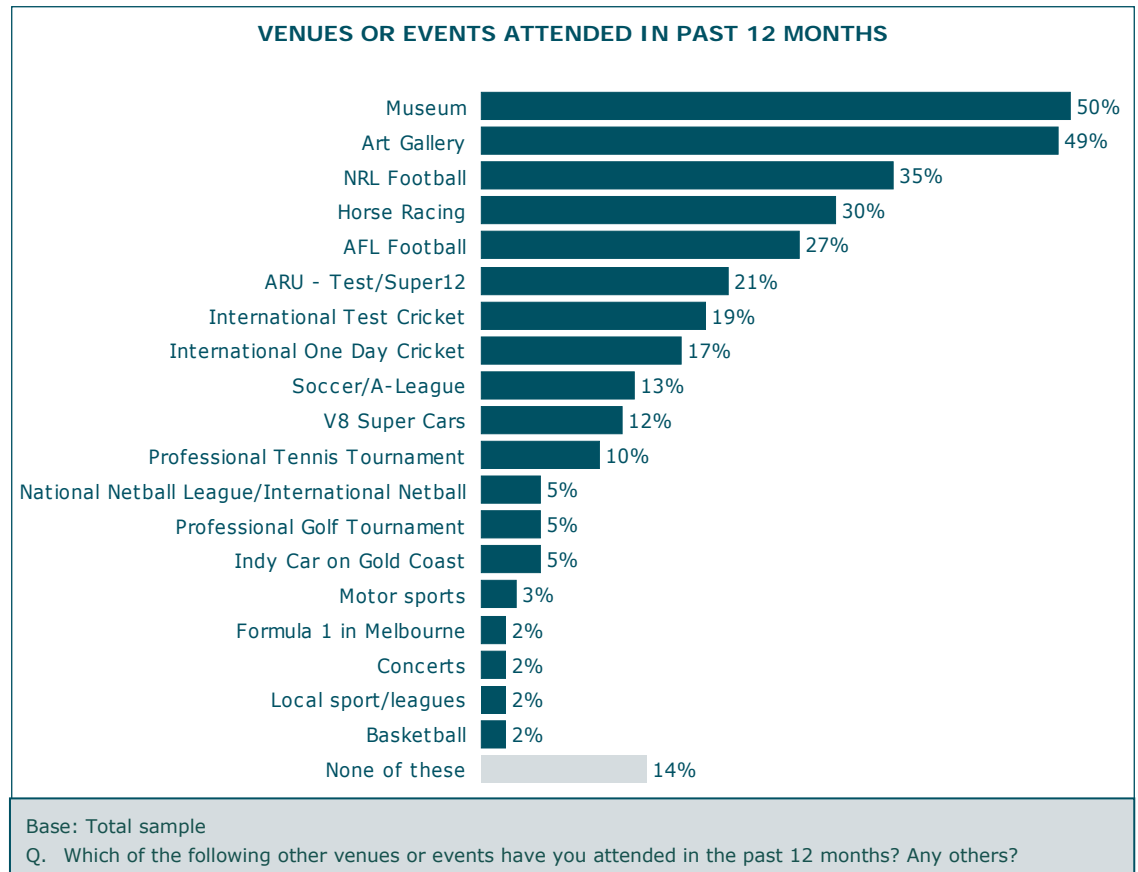
Respondents were asked which events or venues they had been to during the previous year. They were prompted with 15 of these, but could nominate other events or venues if they wished.

Only three non-sporting venues/events were mentioned by at least 2% of respondents, and two of these – museums (50%) and art galleries (49%) - had each been visited by around half. None of the sporting venues/events attracted nearly this proportion of people, with NRL football (35%), horse racing (30%) and AFL football (27%) the most attended sporting attractions (in these specific markets).

Six other sporting venues/events were attended by at least one in ten people...

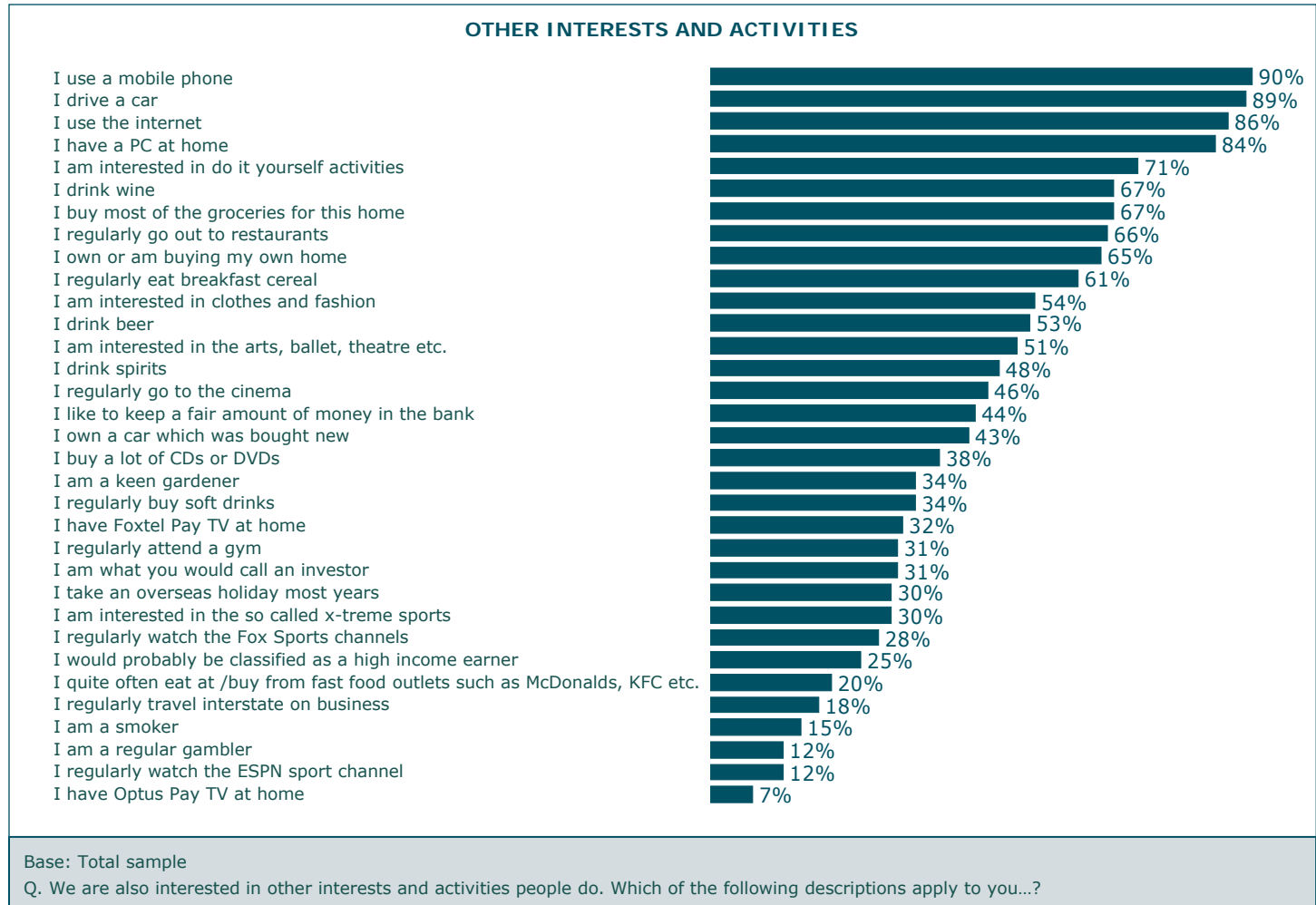
- ◆ ARU – test/Super 12 (21%)
- ◆ Test match cricket (19%)
- ◆ International one day cricket (17%)
- ◆ Soccer/A-League (13%)
- ◆ V8 Supercars (12%); and
- ◆ Professional tennis tournaments (10%).

No other attractions were visited by more than 5% of respondents. Indeed, one in seven people (14%) went to none at all.



OTHER INTERESTS AND ACTIVITIES

These lawn bowls players exhibit a wide range of interests...



DAILY NEWSPAPERS READ

Across the respective regions, newspaper readership differs significantly. The more prominent newspapers are highlighted...

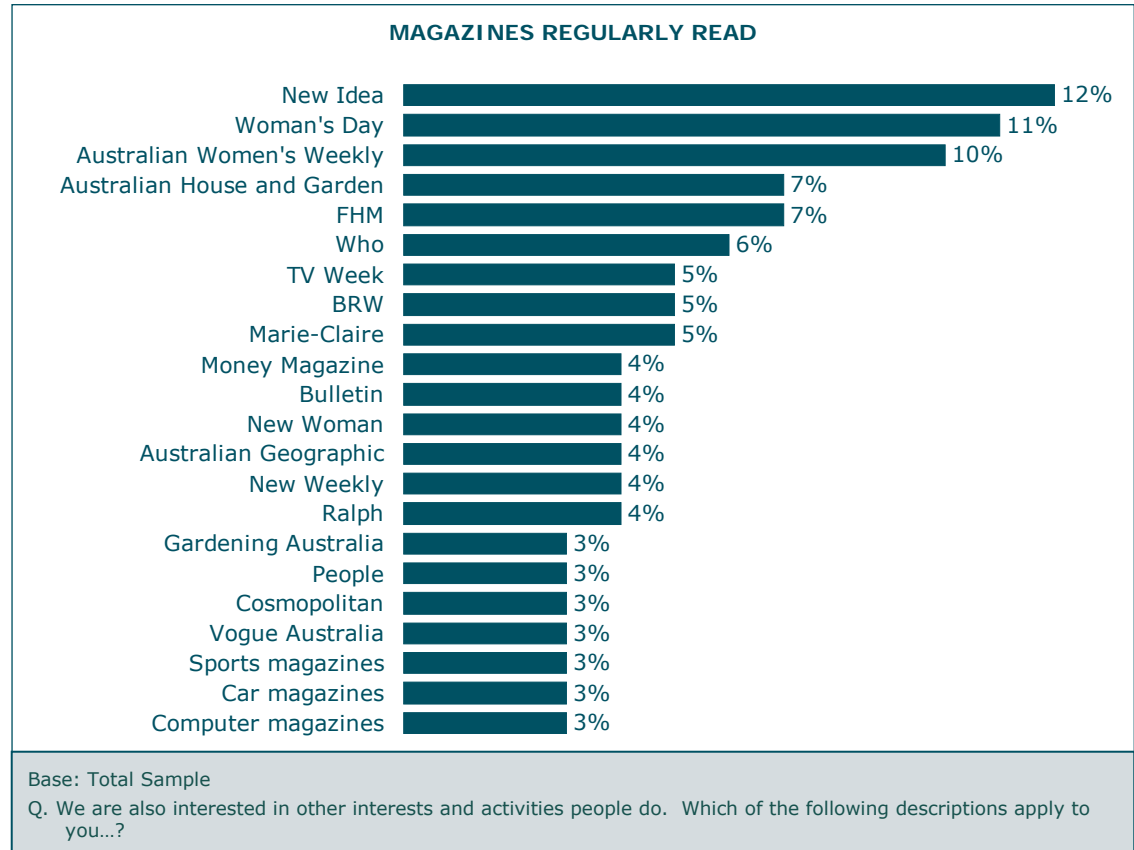
	TOTAL %	REGIONAL VIC %	SYD %	CENTRAL COAST %	BRIS %	ADL %
Sydney Morning Herald	30	-	49	41	2	-
The Daily Telegraph	27	-	44	37	-	1
The Courier Mail	16	-	1	1	63	2
The Australian	13	3	13	6	17	10
The Advertiser	10	-	-	1	2	66
The Australian Financial Review	9	-	12	3	7	7
Sunday Mail	4	-	-	-	10	14
Herald Sun	1	59	1	-	2	-
The Age	1	31	1	1	1	2
Newcastle Herald	1	-	-	12	-	-
The Ballarat Courier	*	28	-	-	-	-
Bendigo Advertiser	*	14	-	-	-	-
Central Coast Express Advocate	*	-	-	7	-	-
None of these	20	13	18	23	20	25

Base: Total sample
 Note: *=less than 0.5%
 Q. Which of the following daily newspapers do you regularly read - that is at least twice a week?

MAGAZINES REGULARLY READ

Given the fairly even bias of the sample, there are a wide range of magazines read, with women’s magazines taking the top 3 spots.

It would be worth considering PR campaigns or specific stories in some of the top ‘ranking’ magazines



INTERNET ACCESS

This sample is a fairly internet savvy group with 86% of the total sample accessing the internet.

Four in ten (40%) access the internet at least once a week.

	Total (476) %	Gender		Age			
		Male (213) %	Female (263) %	20-29 (94) %	30-39 (110) %	40-49 (130) %	50-65 (142) %
Access the internet at home only	29	28	29	30	26	29	30
Access the internet at work only	8	7	9	8	10	8	6
Access the internet at home and work	49	53	45	55	59	48	34
Do not access the internet	14	11	17	7	4	16	29

Base: Total sample
Q. Do you...?

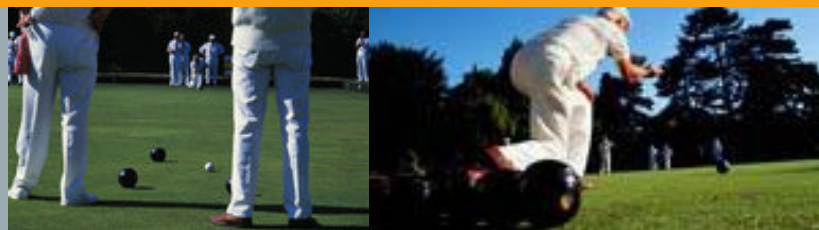
	Total (400) %	Gender		Age			
		Male (185) %	Female (215) %	20-29 (89) %	30-39 (103) %	40-49 (105) %	50-65 (103) %
Almost daily	15	19	9	18	20	8	9
Every 2-3 days	9	13	5	14	8	10	5
About once a week	16	22	8	9	17	23	13
Every couple of weeks	6	7	5	6	3	10	6
Only monthly	8	8	8	12	5	8	9
Less often	46	31	65	40	46	41	59

Base: Internet users
Q. How often do you use the internet for sports information?



Bowls Australia 'Building Participation in Lawn Bowls'

Final Qualitative Debrief and Report Prepared by: Martin Hirons
Client Contact: Mark Rendell and David Fouvy
Study No. 15025 • February 2006



PART B: The Qualitative Research

QUALITATIVE RESEARCH APPROACH



The qualitative aspect of the research involved 6 group discussions conducted during December 2005 in Sydney and Melbourne.

The group discussions were conducted with occasional players, potential members and current members as follows...

Melbourne

1 x Current Occasional Players, Males – 25-35 years

1 x Potential Members, Females – 40-55 years

1 x Current Members, Males – 50-65 years

Sydney

1 x Current Occasional Players, Females – 25-35 years

1 x Potential Members, Males – 40-55 years

1 x Current Members, Females – 50-65 years

THE DETAILED FINDINGS



SECTION SIX: A Snapshot of Their Lives

SNAPSHOT OF THEIR LIVES



Australians from all walks of life are extremely busy and this is reflected in how they describe their current working and 'life' arrangements. The following snapshots reinforce that lawn bowls will find it difficult to get on the agenda and needs to ensure it is able to provide greater relevancy to Australians.

Christina; 40-55 years; potential member; Melbourne

Chef, very busy, lives alone, single. Goes to the gym 2 or 3 times a week, walks most nights, reads a lot, movies, swimming, likes going out for drinks.

Barb; 40-55 years; potential member; Melbourne

Husband, 4 children, 2 beagles, cartographer (business at home) don't get enough sport, eat, drink, travel, crosswords, walk dogs, out in garden, working too much.

Ben; 58 years; current member; Melbourne

About to retire, bowls is a major hobby, theatre, pictures, reading, amateur football. Indoor bowls in winter. 2 kids live overseas, travel a fair bit.

SNAPSHOT OF THEIR LIVES (Cont.)



Ray; 60 years; current member; Melbourne

Been bowling for 25 years, learnt in the country, retired formally in February, 4 kids, 6 grand kids, involved in ex-service organisations and the veteran community, enjoys travel, rugby league, good wine

Dean; 30 years; occasional player; Melbourne

Recently returned from overseas, managing a youth hostel, enjoys travelling, beer, TV, football cricket, soccer, tennis, cooking and eating

Jeremy; 27 years; occasional player; Melbourne

Works in an ad agency, moonlight work on weekends (at night clubs). In terms of sport; motor cycle racing is a hobby, also likes swimming, surfing, rollerblading, girls, swimming and concerts.

...Similar snapshots appear in the Appendix for Sydney residents

SNAPSHOT OF THEIR LIVES (Cont.)



- ◆ Many describe their life as chaotic, exhausting, pressurised, hectic, busy, stressful, regimented, routinised, work orientated, runs to a bell etc..

“Three children, my sporting interests, my children's interests, my wife's interests, parents are involved in their kids lives, it's difficult fitting it all in...”

- ◆ For some life can also be a struggle..

“Time wise, money wise... (Sydney), is a tough city to have children”

- ◆ The upshot of the modern life curse is that, while bowls has a certain amount of relevancy, for many it is understated as a sport.
- ◆ Bowls is not always on the radar. It lacks presence. This is particularly pertinent given the fact that peoples lives are often full with many and varied activities.
 - Squeezing one more activity into their time can often prove impossible particularly if something is not top of mind.

Key Strategic Implication

While we acknowledge that resources at Bowls Australia are limited, the fact that people often talk about how busy they are suggests that...

- Lawn bowls needs to reinforce its relevancy (catered to particular or specific markets)
- (Note that relevancy can differ across segments or markets)
- The sport needs to be elevated in the pecking order (by in some instances becoming more flexible, open and welcoming)



SECTION SEVEN: Leisure Time



THE ROLE AND USE OF LEISURE TIME

- ◆ To gain a deeper understanding of these involved in bowls, or those that have the potential to be further engaged in the game, we explored the role and use of leisure time.
- ◆ Whether we are talking to potential members, current casual (occasional) players or those that are already engaged with a club, the majority highlight that their lives are extremely busy.
- ◆ Leisure time is something that needs to offer a range of benefits that can depend upon one's mood, personal situation, work environment, family situation.
- ◆ For these active adults, leisure time is (and can) be about...
 - Peace and quiet (head space)
 - Some personal time
 - Enjoyment/laughter/fun
 - Something that's easy
 - Getting out of the routine; tuning out
 - Seeking goals (achievements)
 - Getting fit/feeling good about myself
 - Recharging the batteries
 - Socialising/bonding/company of friends/friendship
 - Something that is readily accessible
 - Something I can learn form
 - Keeping the mind active
 - New experiences
 - Flexibility
 - Memories
 - ...and affordability



Bowls can (and does sometimes) meet these desires, if packaged right



THE ROLE AND USE OF LEISURE TIME (Cont.)



Leisure time can either be scheduled into ones week (such as gym, yoga, fitness classes, boot camps) or it can be a last minute decision. So an element of flexibility is a key theme that Bowls Australia needs to explore across both social and membership options...

"Hard to get some for yourself... its more spent satisfying my kids"

"I just find it needs to be time effective"

"You really need something that won't take more than 2-3 hours"

"It's has to be relatively close and handy"

"You don't want to queue up for a long time"

Key Strategic Implication

Bowls resonates on all of the above dimensions – it effectively fits the leisure time mantra.

The element that potentially holds it back for the potential members (and even occasional players) is the flexibility of the membership offer.



THE ROLE OF CLUBS

Clubs still have a highly relevant role for Australians. Whether or not the importance of clubs has diminished is arguable but there are signs that the importance (and relevance) of...

- ◆ Tennis
- ◆ Golf; and
- ◆ Lawn bowls clubs... is less so than it was a decade ago

Through this research, these lawn bowlers suggested that 'clubs' have an elevated status in Sydney simply because of the prevalence of RSL and League Clubs that are strongly connected with the pokie and entertainment environment.

For many, a club is about numerous elements – and there are potentially some slight differences in how Melbourne and Sydney residents look at 'clubs'...



A CLUB IN MELBOURNE

- ◆ Some activity
- ◆ Various facilities
- ◆ Maybe food/wine
- ◆ Take friends
- ◆ Exercise options
- ◆ Some pokies



**Low key
Traditional**

A CLUB IN SYDNEY

- ◆ Cheaper forms of entertainment
- ◆ Access to events
- ◆ Entertainment/Acts
- ◆ Always pokies
- ◆ Various facilities
- ◆ Food/restaurant
- ◆ Take friends
- ◆ Exercise options



**Often an
entertainment hub**





THE ROLE OF CLUBS (Cont.)

There was also in Sydney a sense that some of the larger RSL or League Clubs have pulled back from the community as purse strings (in some instances) have been tightened with...

- ◆ Some bus services disappearing
- ◆ Bingo being not as prevalent as in the past

Many also believe that the bowls option is something that is an add on, or an after thought at some of these facilities – at least perceptually. This has implications in endeavoring to grow the sport.

The variety of other clubs these bowlers and potentials are involved with, are extremely diverse and highlights that the competitive space is multi-faceted...

- | | | | |
|----------|------------|------------|-----------|
| Bridge | Lawn bowls | Basketball | Golf |
| Swimming | Gym | League | Badminton |
| Catholic | Ski club | RSL | Rotary |
| Tatts | MCC | Baseball | |
| Netball | AFL | Book | |
| Footy | Squash | Luncheon | |



Bowls is but one of many options

THE ROLE OF CLUBS (Cont.)

Clubs (should) and often do provide...

- ◆ A sense of belonging
- ◆ Cheaper food and drinks (but at a solid level of quality)
- ◆ A quality venue
- ◆ A sense of community
- ◆ A link with the (a) community
- ◆ A safe; welcoming environment
- ◆ Companionship
- ◆ A place where one can feel comfortable



Key Strategic Implication

As we see later, Bowls clubs and Bowls Australia both have a role to play in enhancing these elements to ensure, in the future, that the industry meets a desired set of standards. The game needs to cater for both occasional/non-pennant players and potential members.



SECTION EIGHT: The Sports Landscape

THE SPORTS LANDSCAPE



While Bowls Australia cannot control how other sports and leagues operate, there are some valuable lessons that many of the 'big name' sports can give or point to , in order to assist with growth.

Outside of the available hard data through Sweeney's, the ABS or Morgan's, perceptually there are a number of sports that are making some inroads both at a broad 'interest' level – and from a participatory sense.

Over the next couple of pages we highlight the sports that are **perceived** to be growing in Australia.

THE SPORTS LANDSCAPE (Cont.)

The sports that have been seen to grow at a broad level include...

SPORT	BROAD INDICATORS	KEY INDICATORS
<p>Soccer</p>	<ul style="list-style-type: none"> • Government sponsorship • The World Cup Win • Schools • Lack of injury; the mum scenario • Juniors/local park • Discussion at work • The new A-League; less ethnic • TV/airtime 	<p>Grass roots</p> <p>Elite success</p> <p>A-League</p>
<p>Rugby League</p>	<ul style="list-style-type: none"> • Crowds back • State of Origin • TV Ratings/TV shows • Back to where it was • Coverage 	<p>Crowds</p> <p>TV ratings</p> <p>State of Origin</p>
<p>Australian Rules</p>	<ul style="list-style-type: none"> • Corporate sponsorship • AFL success – Sydney • Auskick across the board • TV coverage • Schools • Camps/drafts 	<p>Nationalism</p> <p>Success in specific cities</p> <p>Grass roots</p>
<p>Rugby Union</p>	<ul style="list-style-type: none"> • Super14 • Wallabies brand • Professionalism • The presentation 	<p>The league alternative</p> <p>Wallabies brand</p>

THE SPORTS LANDSCAPE (Cont.)

Those sports where there is not always a consensus include...

SPORT	BROAD INDICATORS	KEY INDICATORS
<p>Tennis</p>	<ul style="list-style-type: none"> • Players – few in top 100 • Clubs closing • Lack of umpires at club level • Lack of female role models • Only Lleyton Hewitt • Australian Open 	<p>The Australian Open provides the shining light</p>
<p>Golf</p>	<ul style="list-style-type: none"> • Low levels of sponsorship • Lack of tour events • Arguably on the decline/bottomed out • Many young players noted (in World top 100) • Some question the affordability 	<p>Provides players at elite level</p> <p>Lacks event status</p>
<p>Cricket</p>	<ul style="list-style-type: none"> • More on TV • Australia’s dominance • Local cricket on the decline • Less grounds/pitches • Question marks on image 	<p>Over dominance</p> <p>Local cricket</p> <p>Fewer facilities</p>
<p>V8 SuperCars</p>	<ul style="list-style-type: none"> • National • Hype/events • TV focus – Network 10 • Every Sunday • Adelaide/Bathurst 	<p>Dedicated</p> <p>Coverage</p> <p>Event based</p>

Key Strategic Implication

While resources play a major role, the (more) successful sports often...

- ◆ Have strong development programs (or play a role in this sphere)
- ◆ Develop simple and appropriate membership structures
- ◆ Have a large scale event (or a number of them)
- ◆ Have some international success
- ◆ Have personalities
- ◆ Have TV coverage
- ◆ Typically are in schools or have junior club programs

At a strategic level, Bowls is arguably making headway across all of these avenues but needs to remain focussed as growth will not happen rapidly.

THE SPORTS LANDSCAPE



In a participating sense, we also note the emergence of sports that continue to grow in the fitness or health areas...

Gym workouts

Cycling

Basketball

Pilates

Yoga

Touch rugby (Sydney only)

Kick boxing

Triathlons

Kite surfing

Even **social** lawn bowls (more of this later)



Sometimes work/workplace driven

Sometimes friends/peer driven

Key Strategic Implication

While lawn bowls won't win in the fitness stakes, it provides viable growth opportunities through work and social networks.



SECTION NINE: Lawn Bowls & Where it Fits

CURRENT PERCEPTIONS

The perceptions of lawn bowls by occasional players, potential members and current members are in the main, relatively consistent.

There are two distinct dimensions or images emerging from the sport and clearly it represents two distinct products...

AT A SOCIAL LEVEL

- ◆ The film... Crackerjack
- ◆ Secret life of us
- ◆ Moving along/growing/progressive
- ◆ Changing
- ◆ Relaxed
- ◆ Flexible
- ◆ Younger
- ◆ St Kilda
- ◆ Paddington
- ◆ Inner suburbia
- ◆ Barefoot blowing
- ◆ Parties
- ◆ Corporate
- ◆ Outdoors
- ◆ Beer and bowls
- ◆ The outdoor option of pool/snooker
- ◆ When I want; with friends/work colleagues

The social (non-pennant) brand is...

- Fun
- Light-hearted
- Vibrant
- Flexible



CURRENT PERCEPTIONS (Cont.)

In contrast the club brand is anything but vibrant...

AT A CLUB LEVEL (TYPICAL CLUB)

- ◆ Dying
- ◆ Fewer members
- ◆ Clubs folding
- ◆ Older (very!)
- ◆ Dull
- ◆ Some Discrimination
- ◆ Tradition
- ◆ White uniforms
- ◆ Rules and regulations
- ◆ Upper class (aloof rather than premium)
- ◆ Some clubs thriving
- ◆ Clicky groups
- ◆ Cranky women
- ◆ Power plays
- ◆ Run down
- ◆ Dated décor
- ◆ Small bar area
- ◆ Fast food (at best)

The sport (pennant) brand is...

- **Too serious**
- **Old**
- **Staid**
- **Non-aspirational**

CURRENT PERCEPTIONS (Cont.)

While Sydney lawn bowls clubs have been helped by the poker machine environment and take overs by the RSL/League Clubs, the **traditional** clubs suffer from the same perceptions as in Melbourne.

“If the licensed club is successful the bowling aspect goes along with it”

The blended RSL/League Clubs (combo clubs) offer...

- ◆ Something for all ages
- ◆ Can cater for children, mum and dads; and
- ◆ Older residents

As well it has a range of options covering...

- ◆ Games rooms
- ◆ Pokies
- ◆ Entertainment/Acts; and
- ◆ Bingo

While it is difficult to foresee, the scenario in Melbourne may see some “traditional” golf, tennis and bowls clubs come together to ensure the more progressive survive, or even flourish.

Key Strategic Implication

As a social (non-pennant) option, there is much to praise about lawn bowls, many love the old world feel and retro elements – as well as the laid back pace of the game.

At a club level, there is a definite lack of vibrancy and the sport suffers from being caught in a ‘time warp’.

THE NUANCES OF THE SPORT

There are numerous strengths and weaknesses to the game that were highlighted through this study and in effect reinforce the two brands that exist in the game...

The considered **strengths** include...



- o Accessible (clubs are often nearby)
- o The locations of clubs (nearby; many)
- o Affordable
- o Not physically demanding
- o Easy to join (the process, not the perception of clubs)
- o Relaxing or competitive – flexible
- o Can cut cross generations
- o Inclusive (i.e. available to most)
- o Retro
- o Keeping you active
- o Mateship/companionship
- o Achievement
- o Not too demanding
- o Can be competitive/relaxing
- o Available most days of the week
- o Mixed gender
- o Big groups/small groups
- o Can meet people – very social
- o Safe environment
- o Fun
- o Relaxing
- o Being outside
- o Stress free
- o Play with partner
- o Travel and play

WHAT HAS HELPED REINFORCE SOME OF THESE ASPECTS?

Many things have helped the sport in the social context...

- ◆ The fact that clubs have **loosened-up** in some instances – and let 'me' in, in bare feet as well!
- ◆ The inexpensiveness – the **value** proposition is valid... and is a key element
- ◆ The beer and bowls options... the **flexibility**, laid back, casual nature
- ◆ Being (in some areas) **accessible and open** (e.g. Richmond, St Kilda, Fitzroy, Albert Park, Altona, Paddington etc.)
- ◆ The **flexibility** of the playing option (its done for me – someone else organises it)

At a social level, the sport is seen as...

- A great unwind
- Relaxing
- Very casual
- Something you don't have to constantly play
- Somewhere to sit, watch, play, hangout – and drink!
- Providing a cost effective option – in an era of the (expensive) bar/café scene

THE WEAKNESSES OF THE SPORT

The weaknesses of the sport focus on...



- The 'cliquiness'
- The dress code – white frocks, creams, hats
- The image (old, staid, traditional, etc)
- The women members
- Being an 'older peoples' sport
- Rigidness, mystique, poor perception

When asked what they would change, many, including current members suggest they would...

- ◆ Change the daggy, staid label
- ◆ Improve the image
- ◆ Improve perceptions of the clubs
- ◆ Make the dress codes (even) less formal
- ◆ Make the clubs more inviting... give the impression that they are open & accessible
- ◆ But don't alter the social game!

WHAT ARE SOME OF THE BARRIERS TO MEMBERSHIP?

- ◆ Socially there are few barriers although many believe that some of their local clubs are not as friendly and welcoming as they could or should be (even at a social level).
- ◆ A lawn bowls club often lacks a 'fit', or relevance to 'me'. The fact that the **club** image is very different from the **social** image provides some major perceptual hurdles.
- ◆ At a much broader level, there is a perception that many clubs...
 - Don't advertise enough (local papers)
 - Are not welcoming enough (e.g. signage, contacts)
 - Are not something that you rock up to spontaneously
 - They don't let you play
 - **"Even Crackerjack communicates that"**
 - There aren't enough facilities to provide value (quality eating, drinking, gym options)
 - There are no Open Days, so I can't sample it
 - There are no websites
 - The environment can be intimidating
 - The dress code is too stiff and regulated
 - There are pennant restrictions...and so on.

WHAT ARE SOME OF THE BARRIERS TO MEMBERSHIP? (Cont.)

- ◆ Current members involved in this research were typically recruited into their current club by friends or friends of friends, hence there is a major role for current members to play in assisting the growth of the sport. This 'sales' component needs some reinvigoration
- ◆ However, sentiments such as...
 - ◆ "I'm not old enough to play"
 - ◆ "They don't know the clothing restrictions is relaxed"... are not uncommon... hence the perceptual barriers are the biggest hurdles to conversion to membership

Key Strategic Implication

Add value to the club membership option by adding flexibility and enhancing facilities where possible (even a simple coffee machine can help). Try not to alter the social game too much.

THE IDEAL CLUB

- ◆ While it is difficult to pinpoint what an ideal club should look and feel like, many believe that as a social sport, the club environment shouldn't be touched.
- ◆ However in terms of a membership option, there should be a move to incorporate a range of aspects depending upon the size and scope of the club...
 - Quality food available
 - Less emphasis on policies
 - Better or improved facilities (coffee, café)
 - Pool, exercise options, gym etc.
 - Snooker
 - Café
 - Child minding
- ◆ As well, clubs should have open days and tap into the school community. Night bowls and social competitions should not be out of the mix.
- ◆ A series of options worth considering include...
 - Seasonal memberships (eg. summer)
 - Reciprocal nights
 - Lessons/coaching (many often don't know it is available)
 - Other events (music, dress, socials)
 - Night sessions
 - Café options
 - Health Clubs
 - Happy hours
 - Even a National Bowls Day...all are viable depending upon the segment





SECTION TEN: Initiatives & Other Issues



- ◆ We put forward to all segments, the notion of the 'Get-On-The-Green' program
- ◆ In essence, it resonates stronger with those in the 40-55 year age groups. However, there are some younger segments or occasional bowlers (25-35 years) who would gravitate towards it if given the right environment e.g. St Kilda, Paddington etc
- ◆ The strategic elements that resonate with these bowlers include...
 - 60-90 minute sessions
 - Modified game formats
 - Options to participate as an individual or team
 - Bowls equipment supplied
 - Free instructions/lessons
 - Membership links
- ◆ The younger (occasional) players are not necessarily into the membership link – that's not to say they will not join in the future but they want to discover things themselves.
- ◆ The 'structured' nature of the program can also scare-off those younger occasional players as they are looking at flexible options – perhaps drop-in sessions would suffice this segment.



- ◆ For these younger players its about the drink, the barefoot, the banter, the relaxing environment and the opportunity to chill out
- ◆ We believe the program has an opportunity with the older age segment and should be pursued. Some believe a four week option as being more viable and this should not be discounted. Payment scenarios are around \$60-\$100 for a six week session

Key Strategic Implications

We recommend that the key elements of GOTG are introduced nationally as a sampler program.

While it will provide an initial burst, it is unlikely to see conversion to full pennant membership.

Strategically, this brand, its content and structure requires a co-ordinated and cohesive approach to have most impact on trial.

The current full offer, including the name is not quite right.



For some Mod Bowls is the next step (after GOTG). The primary reason it is seen as the next step in the bowls journey is that the 'game format' is described in a particular way. Words such as 'sets of play' and 'ends' are introduced – all of which are often a mystery to the occasional or casual bowler.

Registration is the next step and this makes the proposition one that is **not** for the under 40's; registration is way too serious for occasional/casual bowlers.

At a broad level, questions that are asked include...

- ◆ How flexible is it?
- ◆ How many weeks will it cover?
- ◆ What does the membership entitle?
- ◆ How long will games take (max 2 hours)?
- ◆ What is the name about? ... and so forth

Key Strategic Implication

Mod Bowls has some merit and would be better serviced in areas that have stronger clubs; as it will require strong support from the local bowls club.

The name does not grab their attention, nor does it say much about the game. There is some confusion with Ten Pin.

Most see this as another layer to casual play and is the next step in a journey many are unwilling to make.

However, as a product it adds another layer to a complex process and makes things confusing for many particularly if run in conjunction with GOTG.

COMPETITION/TEAM NAMES



- ◆ We briefly explored the issue of the Australian Open and team names
- ◆ Despite there being two member groups included in the study, few had heard of the Australian Open. This event will take time to build and is an important part of the Bowls strategic portfolio
- ◆ Some names of national players register but they are not names that roll off the tongue - yet!
- ◆ In terms of the team names we tested, at a topline level, the following observations and associations can be made...
 - **Kitty hawks** → American, a plane, what is a kitty? > **Discard**
 - **Jackaroos** → Australian, outback, tough, could also be female version – Jillaroos, the Jack, relevance > **Has Potential**
 - **Crackerjacks** → tongue in cheek, copy of the movie, spunky, not serious enough > a seniors team or social one?
 - **Kittyroos** → women only, American, Kitty cat, laughter > **Discard**
 - **Hi Jackers** → American, terrorism > **Discard**
 - **Bowleroos** → a take on the socceroos, a couple of old bowlers, lawn bowls or tenpin? A bit dorky > **Discard**
 - **Grass Hoppers** → it's a drink, a bug, cops, local, weak, not strong, not a national team (but a kids team or a local one)
- ◆ There is no knowledge of the current Australian team name



SECTION ELEVEN: Additional Discussion

Occasional Player/Potential Member Segments

OCCASIONAL PLAYER/POTENTIAL MEMBER SEGMENTS



- ◆ What this market is after is an **'antidote'** to work regimentation, study commitments and the difficulties of filling everything into tight time schedules.
- ◆ The family segment, too, have **time** problems. However, it is more in terms of 'taxi driving' for the kids.
- ◆ This initial involvement is at times a struggle; it can be depressing for the family man who may feel there is insufficient time for himself.
- ◆ Many feel pressurised; and they want to escape.... But the older segment escape is a little different to the younger adult counterparts.
 - **Young adults do not want to escape or zone out into something that requires commitment or planning (this has major implications for bowls).** Bowls, as they know it, is not a 'sport' for them.



- ◆ For most it's a pastime.
- ◆ Fun. People. Drinks Uncomplicated. It's outdoor. Cool. Flexible.
Often in great locations.
- ◆ Most have not made a conscious decision to play bowls; rather, they've gone along as part of a corporate day, social outing, something that someone else has organised.
- ◆ **'I tag along'** is the sentiment that implies a passive (but positive) acceptance rather than any deep seated commitment to bowls per se.
- ◆ It's a 'glass in one hand – a bowl in the other' context...
 - Relaxation
 - Fun
 - Conviviality
 - Non competitive; and
 - Affordable.

OCCASIONAL PLAYER/POTENTIAL MEMBER SEGMENTS (Cont.)



- ◆ Bows for these irregular and intermittent “casuals” is...

A girl's and guy's thing

Arranged (by someone else)

Non commercialised

A group activity

Social and interactive

“It's kind of a bit like outdoors billiards” (interesting comparison)

- ◆ Could they be persuaded to ‘**play bowls**’?
- ◆ **Not** in the conventional way.



- ◆ To convert people in the short term would require a Packer type shake-up with limited overs; coloured uniforms; quicker results. Initially...

A bowl and a beer

Social outing



Formation of loose teams

(eg. BRW Triathlon)



Then increasing interest in the craft of bowls



A proportion of dedicated followers (maybe even members)



- ◆ Initially, interest must be predicated on **fun**; **relaxation**; **peer groups**; **social activity**.
- ◆ Let's then put together teams and groups...

The Curve Ballers

Jacked Offers

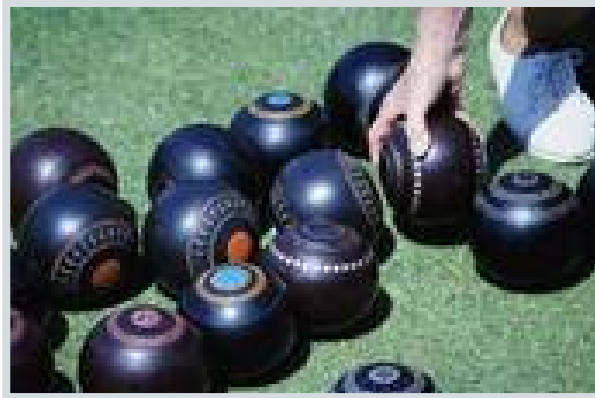
Kitty Cats

Greengrassers



- ◆ Many won't walk in off the street because...
 - The image is still old people on a Saturday/Sunday afternoon
 - The white congregation is almost an extension of church going
 - The perception is that it could be uninviting and unwelcoming
 - The traditional aficionados would be protective of their hallowed green
 - The old timers would be 'cliquey'
 - There is nothing signposting 'Come In'
 - The view is that bowls probably doesn't have a great website
 - The apprehension is that you'd need a uniform.

- ◆ In essence it 'might' be intimidating (but they don't know). And...
 - They don't know 'the rules'
 - They don't know the Australian players (or their youthfulness)
 - They don't know the names of the teams
 - They don't care about the traditionalism.



- ◆ At this stage...
 - They don't want it **structured**
 - They don't want it **intensely competitive**
 - They don't want **time commitment**.

At this stage...

- ◆ They could respond to...
 - Rock Up Bowls
 - Crossover Bowls
 - Retro Bowls
 - Chill Out Bowls
 - Party Bowls
 - Drink'n Roll Bowls
 - Rock'n Roll Bowls
 - Barefoot Bowls
 - Touch Bowls
 - Cracker Jack Bowls
 - Speed Date Bowls
 - Roll Up Bowls
- ◆ This has implications for GOTG and Mod Bowls



- ◆ Perhaps, instead of the BRW Triathlon, there could be the VB Series; the White Goose competition; the Jim Beam ends.
- ◆ Then, over time, a level of seriousness **might** evolve.
- ◆ But don't push the young adults
- ◆ Perhaps provide them with entertaining starter kits; maybe a fun DVD on what it's all about.
- ◆ Never forget, though, this is a **social, casual, loose** phenomenon. It is not, yet, a sport for them. Competitiveness might creep up on them. However, don't force it.
- ◆ The potential members only differ in the context that they are older and often hamstringing by family and partner commitments. However there are growing numbers of single parents and divorcees and this provides a segment to consider - as they may wish to try something new to fill gaps in their lives.
- ◆ The membership offer is still very single minded in that it is only for the serious player and typically does not offer any flexibility.



Conclusions and Key Recommendations

CONCLUSIONS AND KEY RECOMMENDATIONS

- ◆ The social (non-pennant) game of bowls is generally highly regarded. It offers a way to chill out, relax, catch up with friends and there is no commitment – and it is retro and trendy.
- ◆ The club environment itself is perceptually in a time warp – in that this is where the image of the **sport** is anchored.
- ◆ This research has highlighted that occasional bowlers may not yet gravitate towards membership because they don't want the commitment. However, they will take away positive sentiments and experiences.
- ◆ The potential members still don't know enough about the whole bowls system and the GOTG program is a stepping stone to their longer term involvement. For others (the younger) GOTG is just a sampler.
- ◆ Clubs need to consider the closed-shop mentality/perception that exists – and even the members suggest this. Potential members are looking for flexibility and value. The current offer does not do this.
- ◆ We would recommend taking the key elements of the GOTG as a national program – it will give you solidarity and a voice. Until further work is completed on GOTG, the need for Mod Bowls is unclear.
- ◆ The non-pennant/casual game appears in the trendy suburbs requires little tweaking.
- ◆ The Australian team name that resonated best was the Jackaroos - a male/female option depends on the objectives and resources of Bowls Australia.

APPENDIX 1



A Snapshot of Sydney Residents

A SNAPSHOT OF SYDNEY RESIDENTS

Susan; 45-60 years; current member; Sydney

Lives alone, 2 grown up children, plays golf, likes art, reading. Work involves conference organisation. Has more leisure time than working time, goes to films once a week "I do want I want with my time."

Pat; 45-60 years; current member; Sydney

Widow, with a disabled son, recently laid off work but will start work in new year. Loves going out socialising, dancing, reading, walking and animals

Sharlene; 25-35 years; social player; Sydney

Full time secretary, works weekends at Coles, studies 3 nights a week, leisure is social, the park, reads, and occasional lawn bowls.

Cherry; 27 years social player; Sydney

Lawyer, planning a wedding, leisure time is gym and other exercise, lazing out on the beach, walking.

Greg; 48 years; potential member; Sydney

Runs a recreational business, single, swims, runs, rollerblades, ski's, outdoors, walking, the beach, rugby, watching sport on TV, keeps fit, celebrates his energy!

Alan; 53 years; potential member; Sydney

Married, 2 step children, likes anything outside, rugby, fishing, reading, jazz music, eating and drinking

APPENDIX 2



The Questionnaire