

# Brisbane District Bowls Plan 2015



*August 2015*

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***Version: This is a CONSULTATION VERSION for review by a wide range of bowlers and key stakeholders.***

(NOTE: A big thank you to all those who have contributed to this version of plan - there are too many to mention. However, it is hoped that your continued patience and involvement with this process will bear fruit for the game of bowls and those who play it. It is of course recognised that all errors, mistakes or omissions are the author's sole responsibility. Please forward all feedback and input to the Secretary, Brisbane District Bowls Association - [info@brisdista.org.au](mailto:info@brisdista.org.au))

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## Introduction

This plan has been prepared over a period covering 18 months, starting in early 2014. However, it was not until later in that year that the District Management group agreed to consolidate the activities, within the scope of this plan, into a formal Brisbane District Bowls Plan. The purpose of the plan is to support the future development of bowls in this District. In so doing it is intended to operate, over the next few years, as a guide and support for the District management team and Clubs operating within the District.

The plan has been prepared so as to gain as much input as possible from those who are interested in the development of the sport of lawn bowls in the Brisbane District. For this reason, this version of the plan has been prepared as a 'consultation' version to gain as much feedback and more ideas that will contribute to the next version of the plan. The overarching timetable is to enable the District to have an agreed plan in place to support the future operations and decision making of the District from 2016 onwards.

With this in mind, this version of the plan will be distributed to

- All Clubs within the District for distribution to all members of their clubs
- The key office bearers of each club in the District
- All members of the District management, as well as all those who participate on Committees etc
- Nearby Districts
- Bowls authorities - Bowls Queensland (BQ) and Bowls Australia (BA)
- Government bodies - Brisbane City Council; Moreton Bay Regional Council, Queensland Government Department of National Parks, Recreation, Sport and Racing

This wide circulation of such a plan is supported by the following commentary in *The Future of Australian Sport* report completed for the Australian Sports Commission and CSIRO (Hajkowicz, S.A., Cook, H., Wilhelmseder, L., Boughen, N., 2013). That report suggests that

*The broader benefits of sport are being increasingly recognised by governments, business and communities. Sport can help achieve mental and physical health, crime prevention, social development and international cooperation objectives (Cameron & MacDougall, 2000; Schmitz et al., 2004). Sport for children and adults is an effective means of reducing the rising rates of obesity and chronic illness. If managed appropriately, it can be an effective mechanism to help achieve social inclusion for marginalised groups and reduce crime rates. (p.2)*

In this regard, bowls as a sport, is as strong as any sport in not only contributing directly through its own activity but also as a hub for wider socialisation (involving many different interest groups) within the community. Certainly in the past few decades, bowls clubs have become places for 'locals' as members of a neighbourhood/community to participate in social celebrations, special events, cards, dancing, trivia, music, and art, as well as venues for particular community support services and a wide range of social interest groups. In this regard, many bowls clubs are on community held land and as such, authorities responsible for these sites play an important role in the past, present and future operation of bowls.

The plan is structured along the lines of the recommendations arising from the research mentioned above. Hajkowicz et al (2013) suggest a five step process that is needed to underwrite the future of a sport. The five steps are

Step 1

*Construct narratives about the future. Identify and describe future change via some type of narrative (e.g. megatrends).*

Step 2

*Identify actions. Identify possible actions that will better position your organisation with respect to the important changes, as described in the narrative, likely to occur in the future.*

Step 3

*Choose actions. Evaluate and select a portfolio of actions likely to deliver the best outcomes within budgetary and other constraints.*

Step 4

*Implement actions. Obtain fiscal, human and other resources to implement the chosen actions.*

Step 5

*Monitor and adapt. As new information comes to hand, adjust the portfolio of actions to ensure outcomes are achieved. (Hajkowicz et al p.36, 2013)*

This plan is an initial effort to build a narrative for bowls in the Brisbane District (Districts are like 'electorates' in our parliamentary system and a description of these Districts is set out later in the report). And so, the report contributes to Steps 1 and 2 outlined above and it is hoped to gain feedback through this consultation version of the plan such that the District is able to build a robust and broadly accepted base for a positive narrative for bowls in the District.

For too long the narrative in bowls has been and continues to be a negative one - for too long many of those involved in the administration of bowls have suggested that there was nothing they could do about the decline of bowls clubs. "We can't do anything - its up to the Clubs" - well, this District based bowls plan is a reflection of the fact that without leadership from Districts, State and National bodies bowls will continue to decline without a positive framework for building a new future for the sport. It has become increasingly apparent, from the work undertaken in this plan that each District in Queensland, as well as the State and National bodies have a clear responsibility for building that positive narrative.

Further, it is suggested that District planning is the most effective approach to building a 'narrative' that is informed both from the 'top down' and the 'bottom up'. In Queensland it is at the District level that club affiliation with State and National bodies is resolved and it is at this 'electorate' level of bowls that sensible prioritisation and collaboration is most likely to achieve long term benefits for the sport [both **up** to the national governing body of bowls and **down** to the individual bowls members at each club]. It is also at that level, that broader local support can be garnered for initiatives that involve prioritisation, collaboration and rationalisation. It is suggested that both BQ and BA have a very important role in building a capacity that enables district planning to establish sensible, prioritised and achievable steps towards building a brighter future for bowls. Continued recourse by State and National bodies to 'its up to the clubs - we have no authority' will not continue to work. It is apparent that many individual members already feel a lack of benefit arising locally [from the governing bodies of bowls] and see an apparent emphasis on 'elite' bowlers and events, as well as little local return for their increasing affiliation costs.

Of course there are many issues that must be dealt with on the 'ground' and there is no avoiding the fact that there is a significant shift (across the board, not just for bowls) away from organised, team sports and a move towards individual activities such as walking, running and going to the gym. (*Hajkowicz et al p.7, 2013*) People seem to be much less willing to commit time to training and match fixtures in team sports and this seems to be contributing to the rise in individualised sport and physical activity (*Hajkowicz et al pp.7-8, 2013*). Individual bowls clubs need to recognise this shift and need to actively offer different forms of engagement and membership. However, even if such efforts were highly successful, the evidence in this report suggests that there is, quite simply, an overwhelming case in several areas, for there to be less bowls clubs. However, if bowls is to retain its significant social and sporting contribution to communities, the assets of clubs must be contemporary, appealing and multipurpose and the services and support at clubs must be flexible and responsive to contemporary community needs - many current clubs do not meet these basic requirements. And, for this to happen, bowls needs local plans so that priorities can be set, collaborative arrangements established and resources can be channelled into fewer clubs that have the capacity to deliver a suite of social and sporting opportunities for its communities.

This plan is a starting point in building a positive narrative for bowls in the Brisbane District. It has been developed from input that has come from -

- data collected from both BQ and the BDBA
- research undertaken by various parties over the past few years
- direct input by representative of clubs within the district
- discussions with members of the BDBA management group
- discussion with members of clubs
- discussions with both BQ and BA
- discussions with State and Local government representatives

The plan puts forward -

1. a range of data about what has and is happening in bowls in the Brisbane District
2. consolidates some key research that is likely to be very useful to those interested in improving the game
3. a number of perspectives that have been formed through the planning process
4. a number of recommendations that indicate a way to engage with other key stakeholders to further refine this plan
5. some key recommendations on what the association could do on its own account to improve bowls administration in the District.

## Executive Summary

There are many *perspectives* that have become clearer as a result of this planning process. As well, *recommendations* ( for the Brisbane District and its clubs) have been developed following an initial assessment of the available data. This Executive Summary sets out these *perspectives* and then goes through the *recommendations*. It is anticipated that these *perspectives* and *recommendations* for action will be refined following the initial consultation process.

### Perspectives

*From an overall sports administration point of view.....*

Without local plans such as this one, it is difficult to see the sport of bowls maintaining a viable network of locations to service a future sports market for bowls, and associated sporting and social activities. The issue is not so significant, in the short term, for 'resort' areas such as the Sunshine Coast and Gold Coast; however, many other areas, where bowls has played a significant social and sporting role, are likely to see significant rationalisation of venues that could put the sport's viability at risk. It would seem very important for Bowls Queensland (BQ) to apply substantial effort to build the capacity for local plans to form the basis of an ongoing 'narrative' that can contribute to effective prioritisation of effort. This report suggests that BQ would do well to realign some of its development resources to provide core information and data to specifically build and support District level planning. The risk is that without being able to see the 'big picture' broken into its constituent parts, BQ will not be able to sufficiently influence the future success of the sport across the State.

The key bowls authorities (Bowls Queensland (BQ) and Bowls Australia (BA)) could contribute, significantly and proactively, to promoting the expansion of membership offerings by bowls clubs. The current approach could be described as 'sitting on your hands' and may be fuelled by concerns as to whether such offerings may or may not provide authorities with the 'revenue' that has conventionally come from affiliation fees. The issue of affiliation in Queensland has become quite confused because of the clumsy handed approach which has been adopted in relation to dual memberships. BQ could act quickly to clarify its position in relation to this issue because over time, a move to adopt individual member affiliation (which is the natural progression of the dual member approach employed by BQ at the moment) is likely to spell significant reduction of funding to these authorities. With this in mind it is instructive to see how much affiliation revenues (currently through Clubs not individual members) have grown in spite of declining memberships. Attachment One sets out the unsustainable trend growth in affiliation fees which has essentially buffeted the bowls authorities from the reduction in memberships over the past decade.

In regard to membership offerings, BQ appears reluctant to recognise that the bowls market is heavily segmented and research has delivered clear signals about the sort of offerings that need to be made. Essentially, bowls authorities are best placed to actively support the expansion of membership categories at bowls clubs and would be well served by such action, because it is most likely that memberships will decline even more rapidly if a contemporary market oriented approach is not put in place. A

fully developed membership model that aligns with the market research is needed to replace the outdated 'one size fits all' approach to club memberships. A preliminary model has been established as part of this planning process (See Attachment Two) and an initial pilot project by one club has seen a small expansion in membership categories to trial the effectiveness of this approach (See Attachment Three).

Without leadership in (a) building capacity for district level plans, (b) clarifying and applying an integrated approach to affiliation in Queensland and (c) finalising and supporting a more flexible and market responsive approach to memberships, both BQ and BA are likely to see very substantial reductions in their capacity to support future development of the sport. This decline is likely to be accelerated if the current trend in the approach and quantum of affiliation fees continues.

*From a district point of view.....*

It is critical for the District to play a leadership role in building a collaborative environment for both sharing information and building shared visions of the future. District management must operate as a 'bridge' between clubs, bowls authorities and different levels of government and have a focus on maintaining and then developing the games presence in the district.

At this stage, it is considered important that, unless there is overwhelming evidence of specific disadvantage, it will be important to maintain the current configuration of districts so that the management of the core issues underlying bowls' future can be addressed in a stable management context. 'Moving the deck chairs on the Titanic' would not have avoided the impending sinking of the ship and in this light, it is considered that adjusting administrative boundaries is only a short term distraction from dealing with the long term problems confronting bowls.

*From a club point of view.....*

Clubs must work to establish a viable narrative - at this stage, it seems likely that within the next 10 years the number of clubs in the District will move from 17 to 6-10. Without effort to collaborate, share resources and build a future narrative, the remaining clubs may also be very poorly placed for the future sports market place. The current approach could be described as a 'death by a thousand cuts' with each club working independently and no overarching plan in place that would secure the futurity of the game. Under this scenario, clubs battle to survive but the one's who hang on the most may have limited resources, limited appeal and limited capacity to attract future bowlers. This would a gloomy prospect and not the sort of bowls inheritance those many past and current hard working club members want to see. Clubs will need to seriously consider different models of futurity that may involve - sharing assets with one or more clubs, transitioning towards a broader social/community club without affiliation to the District or becoming a 'field' type club that operates essentially only a 'green' as part of a community multisport complex or amalgamating with others to build a better brighter future for themselves and the game they love.

## Recommendations

District Associations such as BDBA have tended to focus on bowls competitions and not on bowls business. This focus was reinforced after many years of growth in the sport through to the early nineties and saw the District playing an important role in coordinating the next level (above club level) of competition. The first decade or more of the twenty-first century has seen bowls memberships declining, club viability declining and participation in district level competitions reducing.

Brisbane District has seen a 50% reduction in individuals bowls memberships and has regularly been having to deal with issues of clubs financial capacity to pay affiliation fees. This has prompted serious concerns at the District level and having raised the issues with both BQ and BA, it was recognised that it was the District that needed to take the first step to deal with the situation. The initial concern was what role or authority the District had. Initial efforts to build the plan from the bottom up by involving each club proved problematic and was based on the credo - 'we can act - it's only the clubs that can decide what happens'. The District then recognised it needed to start to look at ways it could change and how it could influence others to act. This has resulted in the progressive commitment to developing a plan to support clubs see a way forward. It has also been recognised that the District plays an important role in the acceptance of member clubs to be part of the affiliated bowls clubs in the district. The plan has progressed by way of a project officer working to the District Executive and seeking to engage with key stakeholders to garner input and information to support the process.

This plan recommends that

1. This plan form the basis for developing an agreed District plan that is used to inform discussions with BQ, BA and Local and State authorities about the development of the sport in the district.
2. The District adopt a 'cluster' perspective for seeking to ensure that bowls has viable clubs and assets in appropriate locations across the district. This would see the District adopting four clusters as follows
  - a. North West - Ferny Grove/ Samford
  - b. Central - Newmarket/Ashgrove/Grange/Enoggera/Gaythorne/Everton Park/Stafford
  - c. East - Windsor/Merthyr/New Farm
  - d. West - Toowong/West Toowong/St Lucia/Red Hill/Bardon

*(A diagrammatic representation of these clusters is shown at Diagram Three on page 26)*
3. Clubs be requested to participate in working with other clubs in their cluster to establish a simple 'narrative' on how best to develop the game in their cluster. This would cover -
  - a. funding bids for grants and the like
  - b. shared events or tournaments
  - c. membership development
  - d. buying agreements
  - e. asset sharing arrangements
4. Through time the objective would be to have at least one and preferably two high quality bowls venues in each cluster. (This is not intended to be prescriptive and not intended to indicate a maximum number - simply to indicate a minimum objective that would enable the sustainability of the game



in our district. The 'sports' market in the broadest sense of the word will dictate exact numbers.)

5. BDBA actively review cluster developments each year and use this information to support its assessment of club's membership of the District on an ongoing basis.
6. That the Central cluster specifically consider a proposal for the establishment of a 'greenfields' site (and/or an existing bowls club site) for the establishment of a new bowls venue that would house most of the bowls clubs within that cluster.

The plan also recommends specific actions that the District, as an association, could initiate in addition to the broader recommendations set out above -

1. The District Association move to become an integrated association without 'sections' - that is, to move to a single governing body and to have the match and selection committees operate to support ladies and men's competition under that single structure
2. The District develop a fully integrated/coordinated annual bowls calendar ( to expand competition and participation in bowls) covering all district events and work closely with clubs to ensure that all district events support clubs and their bowlers, to the maximum extent feasible.

## A profile of the Brisbane District

### Introduction

The section provides a profile of the District and uses the following headings for presentation of information

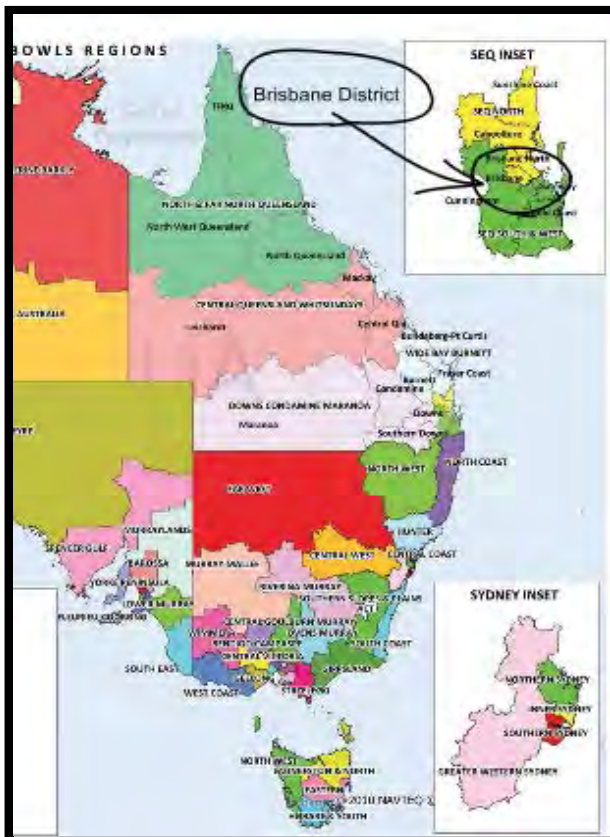
- District
- Clubs
- Individual Bowls Members
- Bowls Competitions
- Assets, Ownership and Governance.

Following presentation of information under each of these headings a *snapshot* of the Brisbane District is presented.

### District

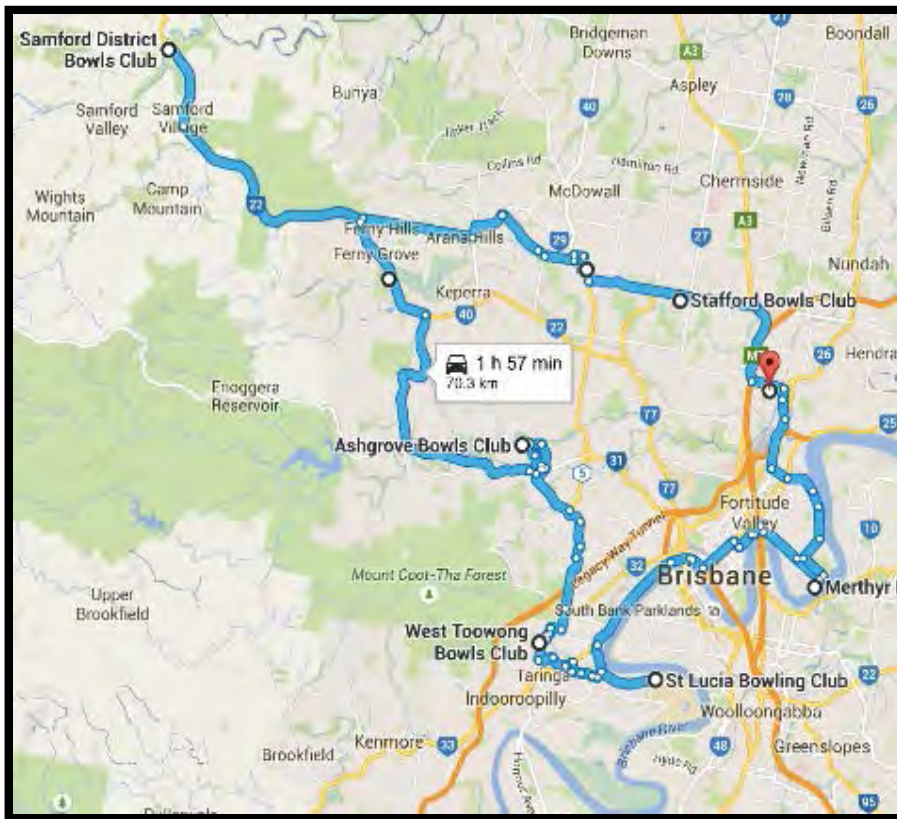
The Brisbane District is one of 21 Districts within Queensland and comprises the Brisbane District Bowls Association and 17 clubs within a specified geographical patch.

The 'patch' allocated to the Brisbane District is shown on the map below



**Diagram One: Map showing Districts in some Australian States: Extracted from Bowls Census 2015.**

The area currently circumscribed by the existing clubs within the district is roughly depicted below. The wide blue 'line of travel' has been created by taking an imaginary car trip that would take approximately 2 hours. This overall footprint of clubs was generated by 'travelling' between the clubs at Windsor to Stafford to Everton Park to Samford to Ferny Grove to Ashgrove to West Toowong to St Lucia to Merthyr and back to Windsor.



**Diagram Two: Brisbane District: Indicative Footprint made by the 17 clubs that currently operate within the District**

However, members who belong to one of the 17 clubs do not all reside within the District's allocated boundaries. The post code distribution of members of clubs within the District's area are listed in the table below.

Postcodes	Includes these suburbs -	Total Members
4000-4010	New Farm; Fortitude Valley; Bowen Hills; Spring Hill; Teneriffe	112
4011-4018	Ascot; Clayfield;Hendra;Nundah;Banyo;Fitzgibbon;Taigum	33
4030-4032	Lutwyche; Windsor;Wooloowin;Gordon Park;Kedron; Chermside West	68
4034-4037	Aspley; Boondall; Carseldine;Albany Creek;Bald Hills; Bridgeman Downs	75
4051-4053	Alderley; Newmarket; Everton Park;Grange;Gaythorne;McDowall;Mitchelton; Stafford	371
4054-4055	Keperra; Bunya;Ferny Hills;Upper Kedron; Ferny Grove;	263
4059-4065	Ashgrove;The Gap; Paddington;Red Hill; Bardon;Dorrington;Kelvin Grove	211
4066-4074	Kenmore; Chapel Hill; Taringa; Fig Tree Pocket;Indro; Toowong; St.Lucia; Auchenflower	294

4500-4521	Bray Park; Cashmere; Brendale; Warner; Camp Mtn; Samford; Mt Samson; Highvale ; Mt Glorious	112
	Other	100
	Total	1639

**Table One: Key Postcode groupings for members addresses in the BDBA**

Four post code clusters contain nearly 70% of the membership numbers. [i.e. 4051-4053/4054-4055/4059-4065 and 4066-4074]. It is considered important in planning that the District seek to retain important 'assets' to service these core clusters of membership population and this issue will be explored further later in the report.

The Brisbane District has been in operation from late 1980s. In the early years of the District the membership across the District was approximately 3500. It is now approximately 1600 - a reduction of more than half. Over the same period of time bowls membership across Queensland has moved from 54,000 to 35,000 - a decrease of approximately 35%. It is anticipated however, that the influx of population to resort areas of the Gold and Sunshine Coasts may be masking the more serious reduction in Brisbane [and most likely other Districts] across the State. Sadly, there is currently no analysis of the District perspective being undertaken and no efforts made to build district level perspectives on how best to deal with the issues.

During this same period in the Brisbane District four clubs have been lost [from an affiliation perspective - Kalinga, Booroodabin, Auchenflower and Indooroopilly. This means that the current, remaining 17 clubs have 'on average' a membership of about 95 members which is well below the number required to sustain a viable club (unless there are significant other revenue opportunities available to a club).

## Clubs

As noted above there are 17 clubs and the following table gives an overview of their total membership and highlights the numbers of members in the 75 years+ category. This number is very likely to be somewhat higher given the numbers of members who have chosen not to disclose their age.

CLUB	Total Members	75+	Age Not Provided	% 75+
<b>ASHGROVE</b>	99	55	1	55.56
<b>BARDON</b>	36	6	2	16.67
<b>ENOGGERA</b>	93	39	3	41.94
<b>EVERTON PARK</b>	163	54	28	33.13
<b>FERNY GROVE</b>	241	52	0	21.58
<b>GAYTHORNE</b>	86	41	2	47.67
<b>GRANGE</b>	34	15	0	44.12
<b>MERTHYR</b>	64	15	4	23.44
<b>NEW FARM</b>	86	9	0	10.47

<b>NEWMARKET</b>	56	22	2	39.29
<b>RED HILL</b>	68	16	0	23.53
<b>SAMFORD</b>	135	33	6	24.44
<b>ST LUCIA</b>	207	108	0	52.17
<b>STAFFORD</b>	72	44	0	61.11
<b>TOOWONG</b>	86	21	4	24.42
<b>WINDSOR</b>	86	15	0	17.44
<b>WEST TOOWONG</b>	27	4	5	14.81
<b>TOTALS</b>	1639	549	57	33.5

**Table Two: Brisbane District Club Membership Totals with related age information.**

Four Clubs have close to 750 members which is approximately 45 % of the District’s total membership. These clubs are Samford, Ferny Grove, Everton Park and St.Lucia. This means that the average membership for the remaining 13 clubs is close to 70 [as opposed to the higher number of 95 mentioned earlier when the whole district membership population is considered across all clubs].

As well, two of these higher membership clubs have age profiles which are at the higher end of the scale - St Lucia has more than 50% of its membership 75+ and Everton Park is very likely to be close to that percentage if the number of “Not Known” ages is taken into account. It will be important to ensure that we build on our current membership strengths but it will need to be recognised that some clubs with currently relatively high numbers may also be confronting serious ‘demographic challenges’ into the future.

Without pre-empting future club decisions, it is most likely that at least two further clubs will not be affiliated in 2016 and several clubs are finding it difficult to forecast continuing beyond the next couple of years.

## Individual Bowls Members

An effort has been made to construct a clearer picture of what is actually ‘happening’ at each club and to form a view about the level of participation and engagement with clubs.

Anecdotally it is clear that some clubs with reasonable membership numbers suffer from low participation rates as members pursue other interests or become less engaged with sporting related activities. An online survey has been available for clubs to complete for some months and at this stage, eleven of the clubs have provided information about current levels of participation. A summary of responses is set out below. The numbers on the right hand side of the information below, represents the number of clubs that fall into that category. So, by way of explanation, when you look at the first two questions immediately below, it will be noted that six (6) clubs indicate that about half of their members are actively involved in playing bowls.

**Approximately how many members in your section/club play bowls every week [on average]**  
**Approximately how many members regularly participate in competitive bowls**

- Nearly all our members play each week 1
- About half of our members play each week 6

- About one third of our members play each week 3
- A relatively small percentage of members in our section play each week 2

**Approximately how many of your section's/club's members visit the club each week?**

- Nearly all our members would visit the club each week 3
- About half our members visit the club each week 4
- about one third of our members visit the club each week 2
- A relatively small percentage of members visit the club each week 3

**Over the past 2 years, how many new members have you gained in your section/club?**

- Our new members joining have kept pace with our existing members leaving the club 4
- We are losing existing members faster than we are gaining new members 6
- Our new members joining have been greater than our loss of members over this time 2

**How many people regularly volunteer for different jobs to support the operation of your section/club**

- 1-5 4
- 5-10 2
- 10-15 2
- 15-20 1
- more than 20 3

**Making your best guess - how many bowls members are likely to be in your section/club in 5 years time?**

- many more 0
- slightly more 3
- about the same 4
- slightly less 4
- a lot less 1

**Is your section/club considering any significant changes to the way it operates?**

- Yes 4
- No 8

An analysis of the answers did not reveal any specific information that would indicate specific significant actions that are likely to cause a change in the operating status of the clubs.

The full details of the survey and the responses are available at the following link - [BDBA SURVEY LINK.](#) In considering these responses it would not be unreasonable to surmise that this survey, completed by 11 clubs, provides a reasonable indication of what is happening across the District. On this basis therefore, the following conclusions could be drawn in regard to whole District . That is -

- About half of the bowls membership is active in bowls either socially or competitively - this would be about 800 members in Brisbane District.
- A similar number, about 800 members would visit their club during the week.
- There is likely to be about 200-300 members across the District engaged in volunteer activities at their clubs.

- Most clubs are anticipating reductions in memberships and are aware of the age demographics of their clubs
- On current indications even given the knowledge about the point above, there is limited evidence of any significant changes likely to be instituted at a Club level.

With this specific information in view about the current state of clubs, individuals and their general engagement with bowls in the Brisbane District, the next sub section looks at the competitive environment of bowls in the Brisbane District.

## **Bowls Competitions**

The competitions undertaken in the Brisbane District are very similar in type and scope to those played in all other bowls districts in Queensland. At the moment, the Brisbane District is exploring ways of improving and integrating the competitions and events so that they are easier for people to participate in and to ensure that there is maximum use of clubs facilities (so as to contribute to the ongoing viability of those clubs, if only in a relatively small way). There is only one issue that has come to notice during the preparation of this plan, that warrants particular attention and that is the Ladies Pennants competition. At this stage, pennant competitions are run in each District and the winning Men's and Ladies club teams go onto to play other District winning teams and then potentially to play in the finals of the State Pennant competition [First Division only].

The reduction in ladies membership and the ageing profile of existing members has resulted in the mid week pennant [First Division] competition only having two teams - this has been the case more than once in recent times. This reduction in competitive opportunities for the mid week ladies is a concern and needs to be addressed. It has in fact prompted calls by members of one club to seek to move to another District. At the time of preparing this plan, there are moves to change the playing time for this event, so as to attract more ladies (and therefore increase the number of teams participating] and there is scope for new alternative forms of open competition to be introduced (mid week) to overcome this unfortunate set of circumstances. In this way, it is anticipated that these shortcoming will be remedied in 2016 thereby overcoming the need to consider a change to district boundaries.

Also, because of the broad issues confronting the bowls fraternity, it could be that a change in boundary may assist with one aspect of the issues confronting clubs (in this case competitive bowls opportunities for its members) but could work against the game if other aspects of the game were considered - e.g. location of members, location of other clubs in the district and so on. Again, at least for the next few years, it seems sensible to build on the existing 'electoral' structure to move towards a sustainable network of clubs and after that - maybe in five years time it may be sensible to redefine competitive boundaries. In the meantime, also, the design of competitions could be altered to support increased opportunities for broader competition and participation: changing boundaries is only one of many ways of dealing with improving competitive opportunities.

## Assets Ownership and Governance

Of the 17 affiliated bowls club in the Brisbane District, four operate on their own freehold land- Newmarket, Enoggera, Samford and New Farm. The remaining clubs operate on Council land or land in some form of trust managed by the Council. At the time of preparing this report, Newmarket Bowls Club is endeavouring to 'gift' its existing land to the Brisbane City Council. The futurity of that bowls club and the nature of the future use of the site are unclear. At this stage, Enoggera Bowls Club has invested heavily in future plans for redevelopment of their site and New Farm Bowls Club are not known to have any specific development plans beyond a continuation of their current operations.

As a result of this asset mix, it appears to appropriate for the BDBA and the clubs to work closely with Councils and State authorities to ensure that, into the future, there is a reasonable distribution of assets that are able to respond to the needs of both the sports and the wider communities in the District.

The BDBA (Brisbane District Bowls Association) [the District] is an incorporated association and a member of Bowls Queensland Council. All clubs in the District are incorporated associations under State legislation and have the rights and obligations under that legislation. In addition bowls clubs that wish to be affiliated to the District and Bowls Queensland must -

- have particular stated provisions within their constitutions
- be a member of a District and
- pay their affiliation fees and meet the ongoing obligations of affiliation each year.

*(Note: Individual bowlers who are members of affiliated clubs enjoy the benefits of affiliation by way of their club's affiliation with the District, BQ and BA. Individual bowlers do not pay affiliation fees - their clubs do. A misunderstanding of this fundamental issue continues to cause considerable confusion within the bowls fraternity in Queensland.)*

Through time it is highly likely that there will be substantially less affiliated bowls clubs in the District. To remain viable as an affiliated bowls clubs, clubs will need to -

- provide assets that are well maintained and are appealing to both bowlers and those seeking to satisfy different social and entertainment needs
- have a business model that produces sufficient revenue (other than bowls) to support bowls activities
- offer memberships and activities that support a much wider range of activities than just bowls

These requirements are relevant on the assumption that a club continues to wish to sustain the extent of the assets and services which have been historically associated with an affiliated bowls club in Brisbane during the second half of the twentieth century. There are clearly a number of different longer term options for clubs, be it as an affiliated bowls club or otherwise. And it is not that affiliation requires these other activities; however, the nature of existing assets combined with the memories of bowls clubs in their 'glory days' means that some clubs tend to keep seeking to sustain a club model that is not supported by their business model.

This prompts a consideration of the different models for thinking about the future of bowls clubs. These models have emerged from discussions in dealing with this plan. For example, if a club wishes to operate what might be called a 'field' type club - where the primary facility is just a green and club house/shed- then some of these 'extra' requirements [such as large club house, bar, kitchen, locker rooms etc] are not essential - certainly not essential for



affiliation . This 'field' type approach continues to be adopted in many sporting situations and could be applied in Brisbane to bowls where there are multisport venues (incorporating cricket or football etc) and the bowls facility could be more or less, just a green' and maybe a small club room and equipment shed. However, to date, this has not been the model that clubs in the District have sought.

Over time also, clubs may consider 'transitioning' to become another type of club and may maintain a 'fun' standard bowls green for parties and functions as part of the overall social activities of the club. Under these circumstances, it may be that the club can sustain a social venue but may not have either the bowls membership or the resources to sustain a competition standard bowls green necessary for affiliation.

Another option is for clubs to adopt a 'shared services model' - under this arrangement, multiple clubs could continue to be affiliated as separate identities but share a clubhouse, bowls greens etc. This model provides players with the security of sustaining the heritage, memories and friendships of their existing club but with an increased likelihood of futurity. Sharing assets reduces costs, reduces the burden of ongoing management and maintenance and increases the likelihood that the asset being used by the clubs will be able to maintained and developed to meet contemporary expectations. It has the potential to increase the sense of 'activity' at the venue and increase the interest in others in being at the venue. It expands the hours of operation of the host venue and therefore means, that the venue is likely to attract more bowlers and fun participants who like to organise their events around their lifestyles.

Given the nature of existing assets, (their ownership and the status of clubs from both incorporation and affiliation perspectives) combined with the realities of the sports market place and the role that sport in contemporary life in Australia, that a collaborative approach will need to be taken to achieve a suitable equipoise of the different interests and expectations across the bowls clubs and their communities within the Brisbane District. It would be feasible through negotiation involving the District, the clubs and the relevant government bodies to resolve through time, an appropriate distribution of 'assets' to support the continuation of the game in the context of the sporting and social expectations of their local communities. The BDBA will be seeking to sustain a core network of quality affiliated clubs with assets that are able to enable the game to develop and provide suitable sporting outlets for people of all ages and all levels of physical capability into the future.

At the same time it is anticipated that the local authority will be seeking to ensure suitable social and community oriented facilities are sustained across neighbourhoods to continue to contribute to social well being and harmony. This also would enable the sport of bowls to prioritise its needs and to channel important government support into core assets at appropriate times. It may also provide government with a clearer framework for identifying how best to channel and leverage any support it is able to provide. In the absence of such collaboration there is a much higher likelihood that the sport is unable to provide effective assets that are able to sustain interest and participation in the game at the same time as providing much needed community and social support. Essentially improved planning and collaboration, given the nature of the sport and the nature of the assets, between the sport and government is most likely to deliver a 'win win' for the parties.

## **SNAPSHOT of the Brisbane District**

In a nutshell the Brisbane District Bowls Association could be summarised as having the following characteristics-

1. You can drive to all of the clubs in the District in a round trip of about 2 hours.
2. There are 17 clubs - likely to be at 2 or 3 less in the next year or so and likely to be 6-10 in the next decade
3. The district comprises 1600 individual male and female members and this number is heading towards about 600 over the next decade, given the age profile
4. It is estimated that there are about 800 current active bowlers who are regularly participating in bowls and this number is heading towards half that number (400 ?) in the next decade
5. Currently, a few hundred volunteers support the operation and delivery of the game and many of these community spirited people are likely to be in a senior age category
6. Four Clubs make up 45 % of the District's membership
7. Four post code 'clusters' contain 70% of the District's membership numbers
8. Approximately 33% of the members are 75+
9. 19 members are under 25
10. 4 (potentially soon to be 3) clubs own their assets freehold

The next section looks specifically at more broadly based research into sport and bowls in particular.

## Research that has a bearing on bowls in the Brisbane District

### Introduction

Anyone who follows team sports such as cricket, rugby league, netball or AFL will know the dramatic changes that have occurred in the way the game is played over the past 20-30 years. But as well as that, these popular games now have national competitions, some have big media contracts that bring many dollars into the sport and so the changes are not just in the way the game is played but also the way in which the 'business' of the sport is managed. This is having big impacts on the way the sport is managed in local areas. In spite of these big changes, there is still a lot of 'grassroots' energy and effort that is put into these sports by mums and dads, supporters, players and officials to get players into the sport and to keep it going from week to week.

Those who have been involved with bowls know that 'on the green' there have been many changes. Coloured bowls, coloured clothes, new competitions such as Premier League and Super Challenge and as well a lot of rule changes. At the same time, most people also see the big reduction in overall numbers playing bowls and the fall off in new recruits in spite of the significant popularity of 'barefoot bowls' in some areas. And as well, there are signs of even bigger changes, with the evolution to a smaller number of clubs [with a small number of more dominant 'bigger' clubs] and the initiative to introduce a 'national' league to bowls to expand the audience 'reach' of bowls.

### Lots of Things are Changing

Sport and people's involvement with sport is, to some degree, a reflection of broader economic and social change. Think for a moment about what has happened to the banking network and the postal network over the past 30 years. The local bank and the local post office don't figure to the same degree as previously and business models have changed with the development of information and communication technology. Recently, there has been research effort to better understand the impact of these economic and social changes and to speculate about what it means for sport into the future.

Four reports in particular have informed the background thinking in the development of this report -

- CSIRO Report **(SEE PAGE 35 FOR**
- ASC Report **THE FULL NAMES & ACCESS DETAILS**
- BA Report **FOR THESE REPORTS.)**
- gemba Report.

'Thumbnails' of each of these reports are set out below. In a nutshell, Australia is now a significantly changed society compared to when many bowls clubs were constructed and this change is not going to stop. To respond to these changes, people who manage and support bowls clubs would benefit from the insights and knowledge within these reports. We may not agree with all the information and we may not 'like' what it is telling us; but, we need to ensure that we are well informed to help our sport to move into the future.

### THUMBNAIL ONE: CSIRO Report

The CSIRO suggests that there are 6 megatrends that will impact on sports in Australia over the next 30 years. These megatrends are -

#### **Megatrend One: A Perfect Fit**

Individualised sport and fitness activities are on the rise (Standing Committee on Recreation and Sport, 2010). People are fitting sport into their increasingly busy and time-fragmented lifestyles to achieve personal health objectives. Participation rates in

aerobics, running, walking, along with gym membership, have all risen sharply over the past decade while participation rates for many organised sports have held constant or declined (Standing Committee on Recreation and Sport, 2010). People are increasingly opting to go for a run with headphones and a music player when the opportunity arises rather than commit to a regular organised sporting event. Expenditure on healthcare as a proportion of total expenditure has been, and is forecast to continue, rising (Australian Government, 2010). Australians are becoming more health conscious. We are increasingly playing sport to get fit, rather than getting fit to play sport.

**Megatrend Two: From extreme to mainstream**

This megatrend captures the rise of lifestyle, adventure and alternative sports which are particularly popular with younger generations. These sports typically involve complex, advanced skills and have some element of inherent danger and/or thrill-seeking. They are also characterised by a strong lifestyle element and participants often obtain cultural self-identity and self-expression through these sports. These sports are likely to attract participants through generational change and greater awareness via online content (e.g. YouTube, Facebook, Twitter). There is strong viewer demand for extreme sports videos on the internet and television. These sports are also finding their way into the Olympic Games;; with a recent addition being BMX cycling, introduced at the Beijing 2008 Olympics. International associations for skateboarding and rock climbing are making substantial efforts to have these included as Olympic sports in the future.

**Megatrend Three: More than Sport**

The broader benefits of sport are being increasingly recognised by governments, business and communities. Sport can help achieve mental and physical health, crime prevention, social development and international cooperation objectives (Cameron & MacDougall, 2000;; Schmitz et al., 2004). Sport for children and adults is an effective means of reducing the rising rates of obesity and chronic illness. If managed appropriately, it can be an effective mechanism to help achieve social inclusion for marginalised groups and reduce crime rates. Sport can also build bridges to other countries and achieve overseas aid, peace, development and foreign policy objectives.

**Megatrend Four: Everybody's Game**

Australia and other countries of the Organisation for Economic Cooperation and Development (OECD) face an ageing population. This will change the types of sports we play and how we play them. There are indications that Australians are embracing sport into their old age. To retain strong participation rates, sports of the future will need to cater for senior citizens. They will also need to cater for the changing cultural makeup of Australia. Australian society has become, and will continue to become, highly multicultural. Different cultures have different sporting preferences and recreation habits. Sporting organisations will be challenged with capturing the interest and involvement of diverse cultures.

**Megatrend Five: New Wealth, New Talent**

Population and income growth throughout Asia will create tougher competition and new opportunities for Australia both on the sports field and in the sports business environment. Asian countries are investing heavily in sports capabilities and, especially in the case of China, have rapidly improved gold medal outcomes at the Olympics over recent decades (Hong et al., 2005). As disposable incomes grow, the populations of Asian countries are becoming more interested in sport. This may

create new markets for sports television, sports tourism, sports equipment, sport services and sports events.

**Megatrend Six: Tracksuits to Business Suits**

Market forces are likely to exert greater pressure on sport in the future. In some sports, elite athletes have had considerable pay rises and large sponsorship deals. This has not occurred in other sports (McMillan, 2011). Sports with higher salaries may draw athletes away from those with lower salaries. Loosely organised community sports associations are likely to be replaced by organisations with corporate structures and more formal governance systems in light of market pressures. The cost of participating in sport is also rising and this is a participation barrier for many people.

**THUMBNAIL TWO: ASC Report**

The ASC Report had a range of detailed findings and some of these are summarised in the following points-

**Finding 1**

Stakeholders believe that (1) there are divergent agendas of national, state, local sports administrative bodies (2) there is potential conflict and competition for funding and challenges in resourcing, particularly in maintaining the volunteer and knowledge base and (3) changing lifestyles and competition from other non-sports options for sport participation are increasing threats to club participation.

**Finding 2**

In the last 12 months, 8 in 10 (79%) Australians aged 14-65 years old did some sort of physical activity, whether for exercise, recreational purposes or for sport. However, participation was predominantly for exercise or recreation (77%) with less than 3 in 10 (29%) stating their participation as being "for sport". Around 2 in 5 (43%) Australians aged 14-65 years old were involved in organised physical activities. Around half of these (49%) were participating in organised physical activity with a sport club, which equates to a total of 21% of the population aged 14-65 years old who were club members.

**Finding 3**

Although general perceptions toward sport and physical activity were largely positive, both the qualitative and quantitative research identified some barriers to participation in sport and physical activity. The qualitative research identified practical and personal/perceptual barriers to participation in sport and physical activity. Practical barriers consisted mostly of a lack of time meaning other commitments or interests took priority over sport or physical activity. Personal barriers included a dislike of the assumed competitive nature of sport (also seen above), self-consciousness, as well as overarching dislike or lack of engagement with sport.

**Finding 4**

A lack of time due to other priorities was the main barrier identified, with a high proportion claiming that "sport needs to fit in with other things; I have other priorities" (59%). A lack of information was also a barrier to participation with nearly one in five agreeing they "would get involved or do more sport but don't know how to go about it". Half of Australians aged 14-65 years old (49%) also held perceptual barriers to sport participation. Much of this was related to the competitive element of sport with four in ten (42%) that agreed that "sport is taken too seriously" and one in five (23%) who disliked the competitive nature of sport. There were also personal barriers to sport participation. One quarter (24%) of Australians aged 14-65 years old preferred to do sports alone (24%) and one in five (20%) felt "playing sports makes me feel

embarrassed / self-conscious". There was also one in five (18%) that simply had an aversion to sport as demonstrated in their agreement with the statement "I don't really get sports".

**Finding 5**

When quantified, the motivations for club membership identified among Australians aged 14-65 years old included those related to self-improvement (63%), general enjoyment or fun (56%), social reasons (48%) and mental benefits (47%). The majority felt that club participation facilitates regular exercise (61%), and half (51%) felt clubs make it easier to get involved in sport and physical activity. Socialising is another benefit of club involvement with over half who felt clubs are good for socialising and making friends (56%). Around half also perceived club membership to provide a sense of personal pride (45%) and belonging (49%). Not surprisingly, club members were more likely to associate clubs with any of these positive benefits (from 68% to 79%) than non-club members (from 33% to 56%).

**Finding 6**

The qualitative research identified that barriers to participation in clubs could be grouped into the practical/ rational barriers and perceptual barriers. The practical and rational barriers were costs (both purely financial and in relation to perceptions of value for money), location and convenience, commitment, and club structures, "politics" and organisation. The perceptual barriers included perceptions of clubs as being 'exclusive' as well as competitive. When quantified, the main rational barriers among Australians aged 14-65 years old relate to inflexibility of club schedules and conflicting commitments (46%) as well as cost (42%). As expected, these barriers vary by gender and life stage.

**Finding 7**

Achievement was seen as central to gaining acceptance in clubs. Club members were perceived by the majority as cliquey, exclusive, single minded and often highly judgemental of non-participants or those with a lower level of ability at sport . A general consensus was that clubs only operate an "open door" policy to those with sufficient ability and commitment. Many felt they were incapable of achieving success as they perceive their skill level to be too low, don't feel confident in being able to break into the social scene, or felt unable or unwilling to put in the perceived commitment necessary. Furthermore, they felt acceptance would take a significant commitment in time which would be to the detriment of other interests/commitments.

**Finding 8**

Many of these respondents saw having a competitive nature as a prerequisite for club participation. Perceptions of club members and clubs as intrinsically exclusive, judgmental, and overly competitive can put a lot of potential participants off. For many the overriding conclusion was that they were not the "type" that clubs would be interested in. These perceptual barriers were confirmed in the quantitative research among Australians aged 14-65 years old (total population) where three in ten considered clubs to be competitive (29%) and one quarter (25%) who felt that they do not fit with clubs (25%). As would be expected, non-club members were consistently more likely to perceive any barriers to club membership.

**Finding 9**

A total of 25% of the Australian market aged 14-65 years old were currently not members of sport clubs but expressed interest in joining one to do physical activity or sport. This equates to over 3.8 million Australians who are potentially new club members.

**Finding 10**

Current club members aged 14-65 years old showed interest in a range of product offers that would potentially increase loyalty and involvement with sport and clubs. Of particular interest were those which provide flexibility financially (flexible membership options in terms of pricing (50%), two for one memberships (28%) and flexibility in terms of time (33% on more flexible times to participate, 27% on less pressure to be involved in other activities). As well as this, interest was shown in products to help overcome family commitments (29% any related mention). There was also interest in free trials (39%) which would be a good opportunity to get existing members to try new clubs. In line with this, one in five (22%) were interested in the ability to play different sports or multiple sports within a club.

#### **Finding 11**

There are many opportunities for clubs to provide products and services that address the needs of non-club members by addressing practical concerns and perceptual barriers to club consideration and trial. Clubs could support acquisition among non-club members by providing options that meet their needs for flexibility (70% of respondents found at least one option for flexibility appealing). There was also interest in options that consider family situation with a quarter (26%) that found options such as childcare facilities, family membership and parent children participation appealing. Additionally half (50%) found options that reduced perceptual barriers around the competitive nature of sports and expectations of performance appealing. These included beginner classes (34%), more social and less competitive competitions (26%) as well as equal treatment regardless of how good you are at sport (17%). Lower expectations or demands from clubs on involvement outside of playing sport would support acquisition for three in ten (28%).

### **THUMBNAIL THREE: BA Report**

The BA Report looks mostly at existing bowlers and assesses that -

- Membership decline is a pervasive problem throughout bowls
- Clubs appear ill-equipped to deal with diverse population groups and need assistance in how to communicate with and market themselves to local communities
- Clubs are facing a number of key challenges, specifically in relation to the way in which they manage their business, the increasing financial pressures to run a club and their future leadership capacity
- The majority of respondents [to this research] are of retirement age, earn less than \$40,000p.a. are born in Australia and if born overseas, have been living in Australia for more than 10 years
- Most club members have been involved with their club for more than 6 years, visit their clubs more than 10 times per month and spend at least 10 hours per week at the Club.
- As well, the report looks at the potential bowls experience that will attract new participants and suggests that
- A key challenge for bowls is to offer a desirable bowls format that fits between casual bowling and Pennant competition that will attract a market that clearly does not want to play Pennant in its current form.

### **THUMBNAIL FOUR: gemba Report**

This report looks at 6 key factors in relation to bowls -

- competitive landscape
- market size

- motivations and barriers
- retention
- image perceptions
- commercial impact

Key findings include -

- bowls ranks 18th in sports participation at 5% behind Canoe/Kayaking and AFL. The top ranked sports were swimming [32%], gym/workouts[21%] and dancing and cycling at 17% each.
- bowls participation for the age group 65-75 is 8% which is on a par with cycling but well behind fishing [20%] and swimming [22%]
- of those surveyed, participation in bowls over the past 12 months was 76 % by casual [barefoot] type bowlers
- bowls ranked 22nd in participation by the population over the past 12 months[at 1%] with gym workouts, swimming and cycling the top three [at 15%,11% and 9% respectively]
- 82% of those surveyed indicated no interest at all in participating in bowls [in the next 12 months] whilst **3% show a strong interest in doing so**
- the main barriers indicated by those interested in participating in bowls in the next 12 months were (a) who to participate with (b) cost and (c ) season commitment
- the main reasons offered by those who had stopped participating in bowls in the last four years were (a) too busy (b) become bored (c ) lost interest
- participants in the survey **ranked bowls extremely lowly in relation to (a) exciting (b) modern (c ) fun (d) exclusive (e)for young people and (f) cool**
- participants **ranked bowls 9th in relation to 'ageless' behind swimming, tennis, golf, running, dancing and golf**
- **one of bowls highest rankings among participants was 5th in relation to 'losing popularity'.**

## **Summary of this Section**

These four reports contain very valuable information to help people involved with bowls clubs and districts in Queensland. Sadly, in the process of preparing this report, it has become clear that the information contained in these reports is not being summarised and circulated to staff engaged in bowls development and nor is it regularly being provided to those involved in the administration of the sport. Consequently, those who could do most with the information are not being made aware of it. Even more tellingly, bowls authorities are not actively supporting the implementation of actions to give effect to the findings in these reports.

One particular example of this is the approach to bowls membership. Research indicates clearly that the market is highly segmented and that multiple types of memberships are being offered by other sports to attract different segments of their markets. Work on developing membership templates for bowls, that would 'fit' particular segments, seems to have come to a standstill. As well, the authorities seem to be more concerned to protect their slice of the affiliation pie than to promote flexible social memberships that may support clubs attracting more members to their clubs. Attachment Two is a report prepared as part of this project which sets out a model for segmenting the bowls market using the research outlined above.

Also, given the senior and voluntary nature of many club management teams, there is very limited awareness of either, the research or the potential flexibility available to clubs to tailor



memberships to meet the needs of local market segments. Essentially, the research and the feedback around clubs is that very few members of the sporting public are interested in full bowls membership: this is not because of price but because the 'package' that membership entails is far too restrictive and unappealing. The evidence is that the future market for bowls lies in providing members the opportunity for self organised interaction and games with their chosen friends and colleagues at irregular intervals that does not involve fixed time commitments to play in old fashioned outfits every week.

This involves access to bowls assets at many different times and requires assets to be capable of being managed to accommodate a wide range of different users. In addition the assets need to provide the opportunity for entertainment and a range of social interactions that support people getting together other than just through bowls. If at one end of this spectrum you picture the 24 hour gyms that are popping up all over the place and you then imagine the current 'timetable' for bowls clubs to be open and available for use - it is clear that the future for bowls clubs must be able to accommodate a much higher level of flexibility and this flexibility covers - type of membership; when you play; what you wear; what sort of game you play; who you play it with; what rules apply and so on. There is a whole 'supply chain' of flexibility that needs to be in place to meet even the current needs of the potential sports market place for members and participants.

Evidence collected thus far indicates that more than half of the bowls club currently in the Brisbane District are unlikely to achieve this level of capacity and are most likely to 'close down' or transition to another form of social/ sporting venue in the next decade. This represents a significant challenge for bowls administrators at all levels of the game and requires them to actively collaborate about the most effective way of moving the game into a successful future. This will not be achieved without concerted effort to ensure that there is a strong and viable network of clubs offering flexible bowls activities for the sporting public. The BDBA is not aware of any other bowls district which has undertaken a process to seek to bring the different levels of the sport together to focus on a bowls District. The 'burning platform' for the Brisbane District is the likelihood that many of its clubs are not likely to be operating in their current guise for more than five years. The next section of this report seeks to bring together the information collected from this project and to distill into a key set of recommendations that will form the basis for developing appropriate actions.

## Key Issues

The issues confronting the BDBA sit within the broader context of bowls administration at both State and National levels. However, a District such as Brisbane can provide important leadership at a time when most key stakeholders in the game have found the whole issue of re-positioning what bowls clubs have to offer within the contemporary sports marketplace in Australia too difficult. This is not to underestimate or not to recognise the considerable efforts of Bowls Australia to endeavour to reposition the perception of the sport in the sporting public's mind. Event activities such as the Australian Open on the Gold Coast and the Australian Premier League at Pine Rivers Memorial Bowls Clubs are two clear examples where BA is seeking to promote a shift about what the sport has to offer - exciting, fast paced, competitive, engaging and requiring high levels of sportsmanship and skill - as opposed to slow, boring and played by older people. This is progress that will support future efforts to reposition the public's perceptions about the places where they engage with the game - at bowls club. At this stage none of the key bodies have developed a framework for reinvigorating the places where bowls is played. And for as long as bowls clubs are tired and run down with limited contemporary appeal this job will be even harder.

It has become apparent through this planning process that 'assets' are the key mechanism through which locals gain their contact with and impression of the sport. As clubs diminish it will be critical to have a core of clubs with assets that provide appeal and opportunities for people to get to know bowls. The sport must therefore find a way to improve core assets so that in each key market there are contemporary well maintained appealing facilities. This can't be done unless priorities are established and plans put in place for it to happen that way.

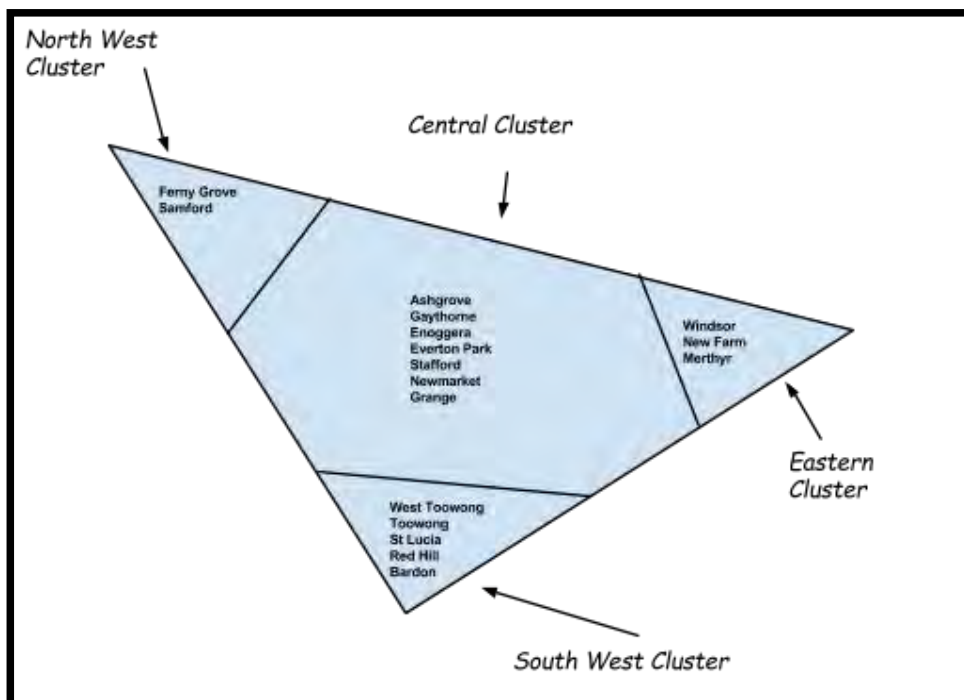
Without seeking to 'pick winners' in the first phase of a new planning process, it is proposed to consider viewing the District as a key point of collaboration between clubs and all other stakeholders inside and outside the sport. This is, in and of itself, a new connotation on the role of Districts which previously have been primarily involved in thinking about bowls competitions - not bowls 'business'. However, this emergent role for Districts becomes critical if the sport is going to prioritise its existing assets and its future investments in order to create bowls venues that are able to attract new members and new participants into the game. This role is connected with a District's pivotal role in affiliation and could see a District build a plan that is able to operate as a bridge between local issues and wider policy, social and commercial issues for the benefit of all sides. This is very similar to what 'electorates' do for the wider population in dealing with many issues confronting our governments and society.

From there, it is proposed to consider the geography of the District [in the broadest sense] and look at ways in which clubs already servicing similar areas could operate to collaborate on building their mutual contribution to the development of the game and also their communities. The location of existing clubs and the location of existing members seems to a preliminary starting point for thinking about the future 'profile' for bowls assets in the District. Recall the concentration of membership in certain groupings of postcodes noted earlier. The four postcode clusters with the highest numbers are set out in Table Three below.

4051-4053	Alderley; Newmarket; Everton Park;Grange;Gaythorne;McDowall;Mitchelton; Stafford	371
4054-4055	Keperra; Bunya;Ferny Hills;Upper Kedron; Ferny Grove;	263
4059-4065	Ashgrove;The Gap; Paddington;Red Hill; Bardon;Dorrington;Kelvin Grove	211
4066-4074	Kenmore; Chapel Hill; Taringa; Fig Tree Pocket;Indro; Toowong; St.Lucia; Auchenflower	294

**Table Three: The four largest groupings of postcodes for members' home addresses in the BDBA**

These four postcode clusters are one dimension for thinking about 'clusters' - there are many other issues that are important - transport routes and corridors; location of existing clubs; status of property ownership and so on. With a preliminary assessment of these factors, it is feasible to consider four BOWLS CLUB clusters as a starting point for thinking about the retention of core assets in key locations across the district. This is diagrammatically illustrated below.



**Diagram Three: Preliminary Cluster Model for BDBA Clubs**

It will be important to gain input into the specific number and size of each cluster however there is no 'magic' in the cluster boundaries - the major issue is the work that happens after that. So, once the clusters are resolved, it is anticipated that by identifying strengths weaknesses, opportunities and threats in each cluster, the participants in the District can start to establish potential 'lines of action' to promote and enhance bowls in their cluster. For this to happen, each club needs to recognise that a nearby club is not a 'threat' to its future. The simple fact is that nearly all bowls are 'under threat' and without banding together and working as a team, there is little prospect of a happy ending. Other sports have also used clustering to progressively establish a core network of 'affiliated' clubs that are able to effectively service their communities and in our particular case, their bowls markets.

A current brief assessment of the 'first cut' clusters (set out above) provides an indication of what the initial opportunities may be in the process.

### **Central Cluster:**

Ashgrove  
Gaythorne  
Enoggera  
Everton Park  
Stafford  
Newmarket  
Grange

This is the pivotal and most problematic cluster in the District. This has the most clubs in closest proximity to one another and several of these clubs have suffered the steepest decreases in membership across the district. There probably is no more than 5 minutes drive between each and their nearest bowls club neighbour - most significantly, the suburbs and communities which saw these clubs flourish through the baby boomer years have changed significantly in the past two decades. Discussions have already started between these clubs and the scope to develop a 'premier' bowls facility on a 'greenfields' site or an existing bowls club site, offers enormous potential. Over time, this could see these clubs sharing a single large facility that could become a showcase for future generations of competitive and fun bowlers.

Both Enoggera and Newmarket are freehold sites and offer the scope for on site redevelopment. Or a sale could see the revenues applied to a new core facility. Stafford is also a potential site for further redevelopment with the potential involvement of a private party in concert with the Brisbane City Council's role with the Gibson Park Trust. It is most likely that successful collaboration in this cluster would make an very considerable difference to the capacity for bowls to re position its asset base to open the doors for growth in membership and participation. Without this redevelopment, the future for all of these clubs is questionable with some being able to 'hang on' for several years, whilst others are already close to their last years [at least as affiliated bowls clubs].

At the moment, the Newmarket asset may be transferred to the BCC at no cost and this may enable the asset to operate as broadly based community venture for years to come. However, the potential loss of this as a possible redevelopment option is problematic given that several assets not far from this site are also very likely to become available for alternative or broader community involvement into the future. Ashgrove is in a multisport cluster, with a high percentage of 75+ members and an almost full reliance on voluntary help to operate. Ashgrove longer term, may be capable of operating as a 'field' type club given its positioning but the level of use and the cost incurred by the local authority to sustain such a facility may not be feasible. Grange is also only 5 minutes from Newmarket and that club is moving proactively to develop a longer term plan for broader community control so that its primary purpose may move more toward social engagement and fun bowls than continuing as an affiliated bowls club. The 'loss' of the Newmarket site at this point in time will provide considerable more challenges for the Brisbane District in seeking to establish at least two core bowls resources [capable of servicing the future sports market place] in this cluster.

### **North West Cluster**

Samford  
Ferry Grove

Samford is the only club outside the Brisbane City Council's jurisdiction and sits on the furthest western edge of the district in the Moreton Council's jurisdiction. Ferny Grove and Samford are both large clubs in terms of the Brisbane District and their facilities are relatively modern and provided good management continues, it is hoped that they will develop and grow over the next 10 years. Samford club has recently undertaken major investment in its greens and shading and its ongoing association with the local community and the U3A are providing a positive trend in new memberships. Ferny Grove is, from an overall perspective, the strongest competitive bowls club in Brisbane and in recent years has encountered significant financial issues. It is hoped that these issues will not recur in the foreseeable future, so this cluster is a strong and positive one for the District. Because of the particular 'geography' of this cluster, these clubs service quite different sub-markets. Again, this is very positive for the clubs and this cluster.

### **South West Cluster**

West Toowong  
Toowong  
St Lucia  
Red Hill  
Bardon

The District has recently lost one club from this cluster - Indooroopilly- and with diminishing bowls membership, it seems most likely that Bardon will not continue its affiliation as a bowls club beyond 2015. Red Hill is located in an attractive and popular location adjoining the Broncos Leagues club and with its local 'markets' and adjoining 'coffee shop' the site offers good potential as a venue for both competitive and fun bowls activities.

The other three clubs - Toowong, West Toowong and St Lucia are very different. Both the Toowong and West Toowong clubs have considerable fun bowls and functions activities to sustain their operations whilst St Lucia is a model of the older style club that operates primarily on servicing its own bowls membership and has been fortunate to have a relatively large and prosperous membership to underwrite its continued operation. Overtime, collaboration could well provide material benefits in bolstering the sustainability of these clubs. The Toowong site suffered extensive water damage during the last major floods in Brisbane and considerable costs have been incurred to rebuild and refurbish the club. Another such event, or similar, sooner than wanted, could cause serious stress and early efforts should be initiated to develop a longer term integrated plan for this cluster.

### **Eastern Cluster**

Windsor  
New Farm  
Merthyr

Two of the clubs in this cluster are only 1km apart. Limited space means that one club has only one green [Merthyr] and the other [New Farm] has 1 ½ greens [the half green can only be played 'one way'] which increases the skill required to maintain this green in top flight condition. Windsor is separated by a few kilometers and sits on the edge of multipurpose playing fields and has been subject to flooding in the past. New Farm is freehold land and several parcels have been sold over time to sustain the club's operations. Both New Farm and Merthyr have strong 'barefoot bowls' businesses with Merthyr reputedly being one of the most financially successful bowls clubs in Queensland. Over time, the bowls relationships between these clubs has been developing and as this plan matures and gains support

across the district, these successful clubs may be able to contribute in different ways to support the development of the game beyond this cluster.

Again, given the emergent nature of this plan, the timing of the Newmarket offer to the BCC is unfortunate as it may preclude one opportunity for an innovative engagement with another bowls clubs to build both social and financial capital across the Brisbane bowls network. Consolidation of some nearby clubs at Newmarket could provide the scope for an existing successful club to joint venture with the existing Newmarket members and sustain both the status and the future of the site's bowls heritage. Time of course is of the essence. However, irrespective of this, the eastern cluster is financially fairly strong and the Windsor club offers highly competitive greens close to the city. The focus of collaboration is not yet completely clear however, the Eastern cluster is likely to be very important to the bowls market in the short to medium term, whilst the popularity of corporate and barefoot bowls remains high.

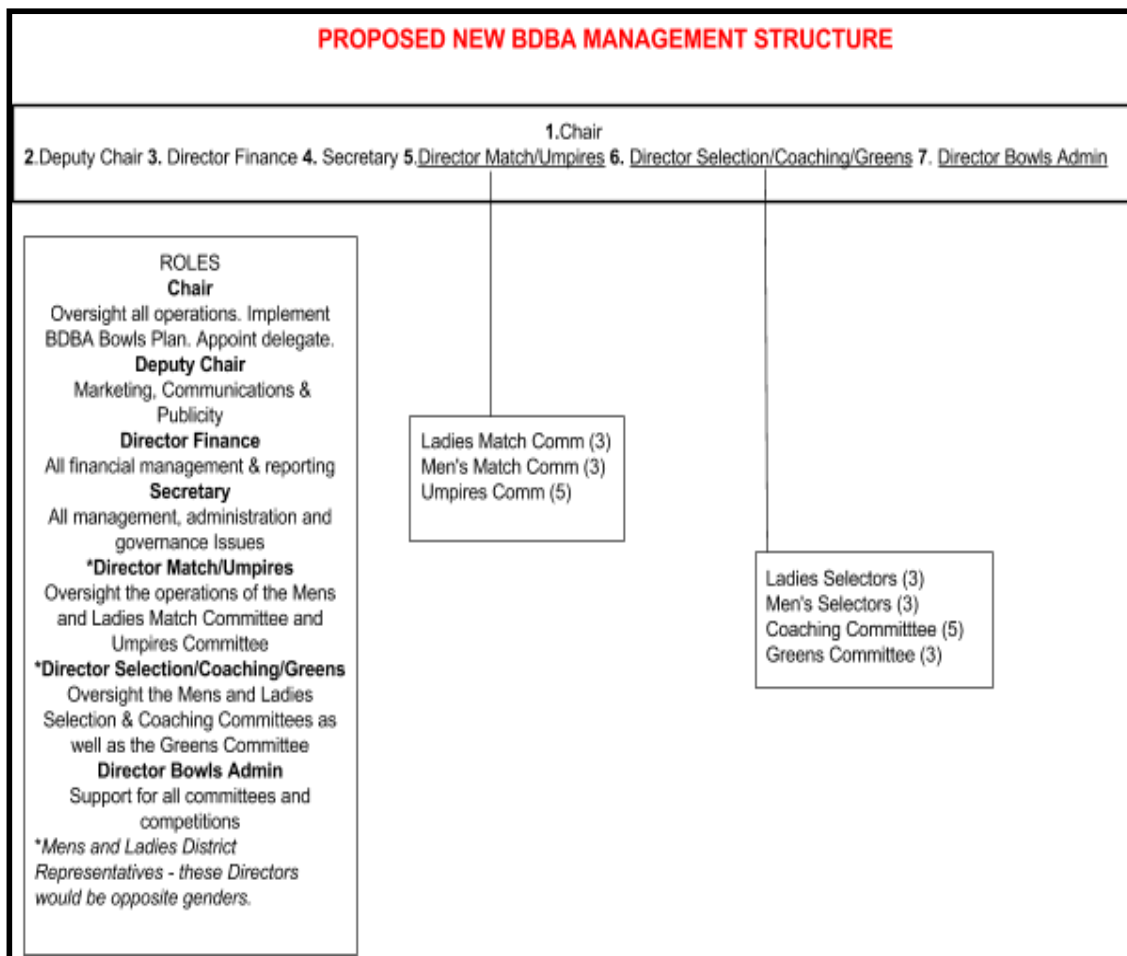
### **Cluster Summary**

The most critical issue in considering the issue of 'clustering' as a mechanism for assisting the District to deal with long term sustainability, is that the particular clusters are not magical - these tentative groupings are a starting point. Over time, experience could indicate that a club may be best placed in another cluster. Most importantly, a clustering approach is only a means to an end - a way of building 'club to club' and 'club to district' understanding, collaboration and development for the benefit of bowls. The primary objective of a clustering approach is to ensure that there is a framework for sustaining bowls clubs in the best places for its members and the community.

### **BDBA as an Association**

In parallel with efforts to understand and respond to the issues confronting the whole district and its bowlers and clubs, the Association has also undertaken work in regard to its own operations. This has involved several workshops during 2014 and then further collaboration and discussion. At the moment, the BDBA is an Incorporated Association and like many district associations and bowls clubs, it operates with two separate sections (Ladies & Mens) that operate under an umbrella 'board' which oversees the operations of the whole district. Some clubs and some districts, have moved to a 'single' structure that sees the sections fold into a single management structure. To some degree, this is similar to what has happened in Bowls Queensland except that BQ is a corporation not an association. Preliminary discussions have been occurring that would see an approach that reduces unnecessary meetings, gives the district a single (and simplified) management focus but retains the capacity for the sections to sustain important day to day operations so as to meet the current requirements of its diverse membership base.

The discussions are ongoing and subject to satisfactory resolution of all issues, the scope is available for this streamlined approach to be put the annual general meeting of the association in early 2016. An indication of the sort of structure that is likely to be both effective and acceptable is set out in Diagram Four below. The structure of the top management group has also incorporated some subtle changes in role to reflect the need for the key roles to be aligned to the key priorities flowing from the previous workshops held by the management group and the issues potentially arising from this report.



**Diagram Four: Indicative Streamlined Management Structure for the BDBA**

The key elements of change arise, not such much in relation to the actual 'structure', but in the intended shift in emphasis in key roles along with endeavouring to 'streamline' operations so that key volunteer resources are not overly burdened by the meeting schedules that are required under the current separate, sectional structure. This proposed structure makes sure that bowls operations are well catered for but that the top management group will have an emphasis on the health and well being of all aspects of the district's operations - covering clubs, the business of bowls and the game of bowls. Position No. 7 - the Director Bowls Admin. would pick up those elements of the roles currently performed by the sectional secretaries in supporting all competitions and bowls events in the annual calendar.

In summary a single, integrated structure reduces the volume of meetings and the number of volunteers required for 'management' roles but still ensures that all existing and important day to day functions and support for competitions is maintained. As well, this approach will enable much closer and effective integration of the bowls calendars for each section and build scope for sharing venues and collaborating to gain maximum participation in district related events.

## Conclusion

To some degree, the primary outcome from this plan is to establish a plan. This is not intended to diminish the need for this plan and also, it is not a matter of prevaricating about what needs to happen - this plan establishes a clear set of recommendations for action and endeavours to lay a foundation for the Brisbane District Bowls Association to build a positive narrative about the future of bowls in our district. But just like the saying that “one good turn deserves another”, this one clear step towards building a plan (set out herein) deserves another and another.... And it is those subsequent progressive collaborative steps by clubs in the District as well as other key stakeholders including Brisbane City Council and the Department of National Parks, Recreation, Sport and Racing that will truly build a viable, shared plan for bowls in Brisbane. So this plan can only ever be a ‘starting point’.

Many senior club members who are struggling to keep their clubs afloat want to see ‘a light at the end of the tunnel’ for their efforts and for bowls. They don’t want to ‘give in’ and let all their hard work count for naught. This plan offers a viable way to help clubs and to enable them to provide a legacy that will serve the future of bowls and its communities well. Many players are frustrated by what appears to be a sports administration approach to bowls that is anchored in the past and based on what we have always done - not what is needed. Many potential new bowlers are charmed by the sincerity and interest shown by club members who help them to learn how to play the game but struggle to understand why someone would want to become a member of bowls club and play long boring games in funny uniforms at a set time each week. This plan puts forward a way for bowlers, members, clubs and the Brisbane District to build a strong positive narrative that will ensure bowls and bowlers are well catered for in coming years. It requires a commitment to engage with building some certainty that we can retain at least 2 core clubs in each of the proposed club clusters, so that we know we will be aiming to have at least 8 clubs well placed to service bowls and its communities in the medium to long term. This will require us to make decisions about priorities and to develop our bowls assets and our bowls memberships to cater for the new and emerging sports market place. This will be a challenge but if we play as a team, the results will be assured.

In order to build this team, we need to build a framework for agreeing on the way forward. The following section seeks to provide the foundation for what needs to be agreed and then actioned. From this planning process, there are many *perspectives* that have become clearer as a result : as well, *recommendations* ( for the Brisbane District and its clubs) have been developed following an initial assessment of the available data. The remainder of this final section of this report sets out these *perspectives* and then goes through the *recommendations*. It is anticipated that these *perspectives* and *recommendations* for action will be refined following the initial consultation process.

## Perspectives

*From an overall sports administration point of view.....*

1. Without local plans such as this one, it is difficult to see the sport of bowls maintaining a viable presence in many locations. The issue is not so significant, in the short term, for ‘resort’ areas such as the Sunshine Coast and Gold Coast; however, many other areas where bowls has played a significant social and sporting role are likely to see significant rationalisation of venues that could put the sports viability at risk. It would seem very



important for BQ to apply substantial effort to build the capacity for local plans to form the basis of an ongoing 'narrative' that can contribute to effective prioritisation of effort. This requires a contemporary approach that realigns those development resources that focus on individual club visits and to start to build core information and data to support the effective distribution of knowledge to inform District and Club planning. At the moment, these development resources have little or no information that expands their capacity to see the 'big picture' and to contribute to spreading the word about what's really happening in a particular district.

2. Bowls authorities such as BQ and BA as well as the Districts in Queensland must recognise that Clubs cannot do sports wide planning - its the role of the sports leaders to build a narrative and to engage clubs in that narrative. The old lament that 'we can't interfere or change what clubs want to do is a clear and unequivocal shirking of responsibility. And yes, bowls authorities can influence what clubs a doing provided those authorities have a credible actionable and viable plan.
3. Bowls authorities must promote the expansion of membership offerings by bowls clubs and stop sitting on their hands in relation to worrying about whether such offerings may or may not provide them with 'revenue'. Unless there is an expansion of membership categories bowls club will decline and close. In the process BQ should rectify the errors which have been made in the handling of dual memberships.
4. The bowls market is heavily segmented and research has delivered clear signals about the sort of offerings that need to be made. Finally, the introduction of a web based membership system to support clubs move towards a www communication and operating environment is long overdue. That affiliation fees were increased two years ago to fund the introduction of such a system and the lack of any tangible progress is testimony to the lack of capacity by BQ to deal with contemporary approaches to sports administration.

*From a district point of view.....*

It is critical for the District to play a leadership role in building a collaborative environment for both sharing information and building shared visions of the future. District management must operate as a 'bridge' between clubs, bowls authorities and different levels of government and have a focus on maintaining and then developing the games' presence in the district.

At this stage, it is considered important that, unless there is overwhelming evidence of specific disadvantage, it will be important to maintain the current configuration of districts so that the management of the core issues underlying bowls' future can be addressed in a stable management context. 'Moving the deck chairs on the Titanic' would not have avoided the impending sinking of the ship and in this light, it is considered that adjusting administrative boundaries is only a short term distraction from dealing with the long term problems confronting bowls.

*From a club point of view.....*

Clubs must work to establish a viable narrative - at this stage, it seems likely that within the next 10 years the number of clubs in the District will move from 17 to approx.7. Without effort to collaborate, share resources and build a future narrative, the remaining clubs may be poorly placed for the future sports market place.

## **Recommendations**

District Associations such as BDBA have tended to focus on bowls competitions and not on bowls business. This focus was reinforced after many years of growth in the sport through to the early nineties and saw the District playing an important role in coordinating the next level above club level of competition. The past decade or more has seen bowls memberships declining, club viability declining and participation in district level competitions reducing.

Brisbane District has seen a 50% reduction in individuals bowls memberships and has regularly been having to deal with issues of clubs financial capacity to pay affiliation fees. This has prompted serious concerns and having raised the issues with both BQ and BA it was recognised that it was the District that needed to take the first step to deal with the situation. The initial concern was what role or authority the District had. Initial efforts to build the plan from the bottom up by involving each club proved problematic. The District then recognised it needed to start to look at ways it could change and how it could influence others to act. This has resulted in the progressive commitment to developing a plan to support clubs see a way forward. The plan has progressed by way of a project officer working to the District Executive and seeking to engage with key stakeholders to garner input and information to support the process.

This plan recommends that

7. This plan form the basis for developing an agreed District plan that is used to inform discussions with BQ, Local and State authorities about the development of the sport in the district.
8. The District adopt a 'cluster' perspective for seeking to ensure that bowls has viable clubs and assets in appropriate locations across the district. This would see the District adopting four clusters as follows
  - a. North West - Ferny Grove/ Samford
  - b. Central - Newmarket/Ashgrove/Grange/Enoggera/Gaythorne/Everton Park/Stafford
  - c. East - Windsor/Merthyr/New Farm
  - d. West - Toowong/West Toowong/St Lucia/Red Hill/Bardon
9. Clubs be requested to participate in working with other clubs in their cluster to establish a simple 'narrative' on how best to develop the game in their cluster. This would cover -
  - a. funding bids for grants and the like
  - b. shared events or tournaments
  - c. membership development
  - d. buying agreements
  - e. asset sharing arrangements
10. BDBA actively review cluster developments each year and use this information to support its assessment of club's membership of the District on an ongoing basis.
11. That the Central cluster specifically consider a proposal for the establishment of a 'greenfields' site for the establishment of a new bowls venue that would house all clubs within that cluster.

The plan also recommends specific actions that the District as an association could initiate in addition to the broader recommendations set out above -

3. The District Association move to become an integrated association without 'sections' - that is, to move to a single governing body and to have the match and selection committees operate to support ladies and men's competition under that single structure
4. The District develop a fully integrated bowls calendar covering all district events for the year and work closely with clubs to ensure that all district events support clubs and their bowlers, to the maximum extent feasible.

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AVAILABLE AT: see NOTE below.

**NOTE: Extracts from each of these reports have been consolidated into one companion document to assist those who are interested in reviewing the research into bowls, used as background to this report. This companion document is available at**

<https://drive.google.com/file/d/0B9KluQHeWongYI90OG1DX29tdkE/view?usp=sharing>

## **Attachment One: Movement in Affiliation Fees**

Year	2014	2013	2012	2011	2010	2009	2008	2007	2006	2005
<b>BQ Affili Fees Rate</b>	<b>\$33.55</b>	<b>\$30.55</b>	<b>\$29.09</b>	<b>\$29.09</b>	<b>\$26.10</b>	<b>\$23.09</b>	<b>\$21.00</b>	<b>\$19.50</b>	<b>\$17.00</b>	<b>\$16.50</b>
BQ Affili Fees Billed to Clubs	\$1,239,316.00	\$1,257,479	\$1,252,386	\$1,324,069	\$1,255,024	\$1,106,234	\$1,059,971	\$994,628	\$895,133	\$921,542
<b>BA Affili Fees Rate</b>	<b>\$10.90</b>	<b>\$10.00</b>	<b>\$9.40</b>	<b>\$7.64</b>	<b>\$7.18</b>	<b>\$6.90</b>	<b>\$6.23</b>	<b>\$6.23</b>	<b>\$5.23</b>	<b>\$5.00</b>
total	\$44.45									\$21.50
BA Affili Fees Billed to Clubs	\$383,974.00	\$383,170	\$379,854	\$327,333	\$323,311	\$325,291	\$307,797	\$316,426	\$270,543	\$262,630
total	\$1,623,290.00									1,184,172
Number of Bowlers (as per Annual Reports i.e. 2014 total of 36,421 is what was detailed as at 31.12.13 Annual Report and affili fees are sent on those numbers )										
Male	\$24,360.00	25,602	26,802	28,406	29,680	31,114	32,496	33,423	34,069	
Female	\$12,061.00	12,889	13,640	14,563	15,410	16,174	16,990	17,485	17,808	
Total	\$36,421.00	38,491	40,442	42,969	45,090	47,288	49,486	50,908	51,877	

% reduction in membership	29.79
% increase in total collected \$	37.08
% increase in affiliation rate	106.74

## **Attachment Two: Preliminary Bowls Market Segmentation Model**

## (1) The Development of a Segmentation Model for Lawn Bowls In Australia and (2) The Potential Development of Products and Services for Key Segments

### **Introduction**

Part One of this paper sets out a potential preliminary segmentation model for use by lawn bowls in Australia to develop strategies for both attracting new bowlers and retaining existing bowlers.

Part Two of the paper puts forward a product/segment 'matrix' which provides a basis for recording both existing products and new/developing products designed to 'match' the needs and wants of the various member/customer segments. It is hoped that this 'matrix' will provide a starting point for BA and STAs to develop a shared understanding of not only [a] what is currently 'on offer' to bowlers[so that good practice in one location can be shared with others] but [b] to identify priority areas for each segment and [c] to consider potential new products[as well as the relative priority] of developing these new products to achieve positive change.

For the purposes of this paper, the terms 'products' and 'services' will be used interchangeably and may cover issues such as (1) types of club membership (2) types of bowls activities/events (3) other aspects of what club's do and provide for their members. The paper draws heavily from the findings of three important research reports and assumes that the reader has an awareness of these three reports. The reports are-

- **ASC - [Segmentation Report](#)**
- **BA in concert with CSSI - Bowls Specific Research** [hard copy available from BA]
- **ASC in concert with CSIRO Futures - [Megatrends in Sport Report](#)**

This paper is designed to assist those working on the BA Strategic Plan 2013-2017, specifically the following strategies-

- Strategic Initiative 1.1 -To research, develop and package a suite of programs and game formats available to clubs to match key segments of the marketplace.
- Strategic Initiative 1.2 - To develop systems and incentives that facilitates broadening participation numbers to include both traditional forms of membership and social participants.
- Strategic Initiative 5.4 - To develop nationwide membership categories consistent with the club bowls marketplace and promoted throughout the bowls community.



## PART ONE

**Two Recent Sport Research Reports To Make One Bowls Segmentation Model**

Table One below sets out the segments which have recently been developed as a result of sports oriented market research in Australia. The first column on the left sets out the segments put forward in the Australian Sports Commission's Market Segmentation Study. It puts forward ten consumer segments among the Australian adult population [aged 14-65yrs] and breaks these segments into three groups - (a) existing club members (b) non club members with high potential for acquisition and (c) non club members with low potential for acquisition.

ASC Segments	CSSI Segments
EXISTING CLUB MEMBERS	EXISTING CLUB MEMBERS
1.Loyalist	1.The Bowler
2.Sport Driven	1.The Bowler
	2.The Socialiser; 3.The Clubber; 4.The Identifier
3.Socially Engaged	
4.Apathetic Clubbers	5.The Consumer
NON CLUB MEMBERS- HIGH POTENTIAL	NON CLUB MEMBERS- HIGH POTENTIAL
5.Sidelined Sportsters	NA
6.Club Wary	NA
7.Ponderers	NA
NON CLUB MEMBERS - LOW POTENTIAL	NON CLUB MEMBERS - LOW POTENTIAL
8.Self Focused	NA
9.Sport Indifferent	NA
10.Sport Atheists	NA

**Table One: Alignment of Segments and Categories from Two Research Reports Regarding Sport**

The ASC segments were developed to provide an 'overview of different attitudes to physical recreation, sport and sport club membership' and are based on 'aggregated data collected at a population level. It does not attempt to cater for the nuances for specific sports, nor does it provide for detailed cuts of data at a local level'.

'Essentially the segmentation approach aims to provide broad guidance to the broad messages and products styles that certain groups of the population may be seeking. Individual sports will then need to further tailor messages and products to suit their individual needs' [pp156-157]. The research identified two sets of variables deemed to be important in developing the segment archetypes:

- 1 *Existing attitudes and behaviour to clubs* – given these are so strong among the population, changing or challenging these perceptions is a critical factor in getting these people to consider clubs.
- 2 *Existing attitudes and behaviour to physical activity* – given "sport" was defined in the qualitative research as "competition" with "exercise", willingness to engage in physical activity is critical to individuals being active participants in a club [p158].

The second group of segments is set out in the column on the right of Table One. These were put forward in research commissioned by Bowls Australia and undertaken by the Centre for Sport and Social Impact at La Trobe University. The research was designed to respond to several questions covering (a) why people play bowls (b) benefits derived from participation (c) why people stop playing bowls (d) what is the 'experience' of playing bowls and (e) what changes would make bowls more attractive. Unlike the ASC research, it was 'sport specific' however, it was not designed to develop a 'needs based consumer centric market segmentation model' like the ASC work. The CSSI model suggests that 'bowlers can be categorised according to their desire to invest in the development of social connections and friendships' [p17]. It puts forward five categories of existing bowls club members based on this desire but no details are provided about the method or underlying theory used to develop these categories. [It would be very useful to know this.]

Table One aligns the different models so that 'segments' that appear to be similar are in the same row. This alignment has been based on the author's review of both research reports and seeks to identify where there are commonalities between the segments from the two research reports. For example the ASC segment of 'Sport Driven' is aligned with the CSSI category of 'The Bowler'. In the ASC report, the Sport Driven segment is characterised by 'their motivation....tends to be more personal and focused....The club is a place for them to access facilities and participate but they don't necessarily want involvement beyond this.' In the CSSI report, The Bowler category is '...what they can get out of the club ....focused on the competitive element of the sport.....not interested in social networks and connections that membership brings'. Based on the characteristics described in each report, there appears to be material overlap between these two perspectives. In a similar manner, the other segments and categories have been aligned. Because the CSSI research only deals with existing members, its scope does not cover the non member segments identified by the ASC research.

From an analysis of the characteristics described in the two reports, the author has drawn the following conclusions [in relation to bowls authorities in Australia moving forward with a single segmentation model] -

1. It would be extremely useful to check with the CSSI as to whether their analysis would 'align' their categories in the same way as

- set out above OR if this is not possible, ascertain if they have any additional information on how they differentiated the segments in their population of respondents
2. A single bowls segmentation model should cover both existing members and non members and could have the following specific characteristics-
    - a. the non members segments [of a single bowls model] would be the ones put forward by the ASC report and be split into the two categories - high and low potential
    - b. the member segments would be (1) Bowler (2) Socially Engaged and (3) Consumer
      - i. the Bowler segment would cover both the Loyalist and the Sport Driven segments from the ASC model as their characteristics appear to be strongly 'age' related to the extent that the 'loyalist' is more likely to be a 'young' bowler and the 'sport driven' is likely to be an older bowler.
      - ii. the ASC 'Socially Engaged' segment would cover the 'socialiser', 'clubber' and 'identifier' from the CSSI model on the basis that these appear to be dimensions of the broader ASC segment. From a reading of the material, it appears reasonable to expect that these three categories would be 'positive' on both the 'club membership' and 'sport / physical activity' scales used in the ASC report.
      - iii. Apathetic clubbers [from the ASC report] 'tend to find value in their clubs for their facilities rather than elements of competitiveness and socialising'. The 'consumer' from the CSSI report tends to 'think of the bowls club as a service provider' and 'generally not interested in the social networks that membership might offer'. There appears to be strong overlap in these categories and I think that the 'Consumer' is a more appropriate term for bowls purposes.
  3. In summary therefore a single bowls segmentation model would comprise -
    - a. Three existing member segments - (1) Bowler (2) Socially Engaged (3) Consumer on the basis that the Bowler category would cover both loyalists and sport driven categories and the Socially Engaged category would cover the 'socialisers', 'clubber' and 'identifier'. Consumer would cover Apathetic Clubber
    - b. Three high potential non members segments - as per the ASC report - (4) Sidelined Sportsters (5) Club Wary and (6) Ponderers
    - c. Three low potential non member segments - as per ASC report - (7) Self Focused (8) Sport Indifferent and (9) Sport Atheist

The proposed 9 segment single bowls model is summarised in the Table Two below.

Segment Number	Segment Name	Comments
1	The Bowler	The segment's name comes from the CSSI report and covers both the Loyalist and Sport Driven Categories from the ASC research
2	Socially Engaged	The segment's name comes from the ASC report and covers three segments from the CSSI report - 'clubbers'; 'identifiers' and 'socialisers'.
3	Consumer	The segments name comes from the CSSI report and covers the Apathetic Clubber segment of the ASC report
4	Sidelined Sportsters	As set out by the ASC segmentation report
5	Club Wary	As set out by the ASC segmentation report
6	Ponderers	As set out by the ASC segmentation report
7	Self Focused	As set out by the ASC segmentation report
8	Sport Indifferent	As set out by the ASC segmentation report
9	Sport Atheist	As set out by the ASC segmentation report

**Table Two: Draft Bowls Market Segmentation Model [based on ASC and CSSI Reports].**

### Way Forward

This paper puts forward the idea that bowls authorities in Australia adopt a segmentation model for both retaining existing members and attracting new members and participants. The ASC has indicated that *'over the next 12months a series of activation projects will be undertaken with a small number of sport to highlight how the market segmentation research can be utilised to inform product offerings.'* If possible, BA could seek to be selected to be one of these activation projects. If not, BA could initiate action, in concert with STAs to develop a set of 'bowls products' that could be linked to respond to consumer needs identified in the segments.

Finally, such products and membership offers could be aligned with particular club profiles so that clubs in particular demographic

settings and with a particular facilities could tailor their products and membership offers to their target consumer audience. Further, revision of the annual bowls census could be undertaken so that demographic data would be provided for each 'district' so that each district was able to see a profile of potential new members and participants based on the 'high' potential segments identified in the ASC report. These 'highpotential segments are -

- Sideline Sportsters: 2,035,878
- Club Wary: 1,145,957
- Ponderers: 2,969,162

In conclusion, it is strongly recommended that

- (a) bowls authorities move to adopt a 9 segment model for retaining and attracting new members in the sport of bowls and
- (b) specific action be initiated to develop (i) **bowls products** to match the consumer needs in each segment and (ii) **information resources** to support districts and clubs.

The second part of this report puts forward a way of applying the segmentation model set out above as one of the tools needed to develop improved products and services for bowls in Australia.

## PART TWO

## Dimensions of Potential Offerings to Bowls Customer Segments

### Introduction

Lawn Bowls is considering the adoption of segmentation as a mechanism for responding more effectively to the needs and wants of those who already play the sport, as well as attracting new people to the sport and new members to bowls clubs.

The reason for adopting a segmentation approach is to be able to develop 'products' or 'services' that will appeal to different members of the segments. So, at some stage lawn bowls clubs and authorities will need to look at changes to their current product offerings to stimulate new members joining, as well as keeping existing bowlers sufficiently interested to remain as members. Later in this paper, a framework for thinking about the type of product offerings that may appeal to the needs and wants of different segments is put forward. For this approach to work it has to succeed in making existing and potential bowls customers 'change' - to do something different e.g. join a bowls club or start participating in bowls or for existing members, not to leave to play another sport. So a full customer segmentation approach involves -

1. model of change
2. segmentation of customers
3. set of products and services.

This paper looks at the all three aspects and at the end proposes a framework for lawn bowls administrators to use in thinking about bowls products and services.

### **Stages of Change**

The researchers who undertook the segmentation work for the Australian Sports Commission note that - 'There is a theoretical model of behaviour change which has been used as the basis for developing effective interventions to promote health behaviour change. The central organising construct of the model are the stages of change'. These stages are summarised below.

#### **STAGE ONE: Pre-contemplation**

- No intention to / an unwillingness to change current behaviour
- May be aware / or unaware of benefits to change

#### **STAGE TWO: Contemplation**

- An awareness of a need for change and understanding of the pros and cons, yet a fear / reluctance / lack of perceived benefit to make the change

#### **STAGE THREE: Preparation**

- Clear awareness of the benefit of the behaviour and learning of what they need to do.
- Concern is possible failure from action

**STAGE FOUR: Action**

- Change has been made, but not ingrained • Experiencing some benefits

**STAGE FIVE: Maintenance**

- Change has been maintained over time

**Lawn Bowls Customer Segments**

Two different research reports have been used as the basis for developing the lawn bowls segmentation model. The 'consolidated' segments have been developed using an assessment of the following factors -

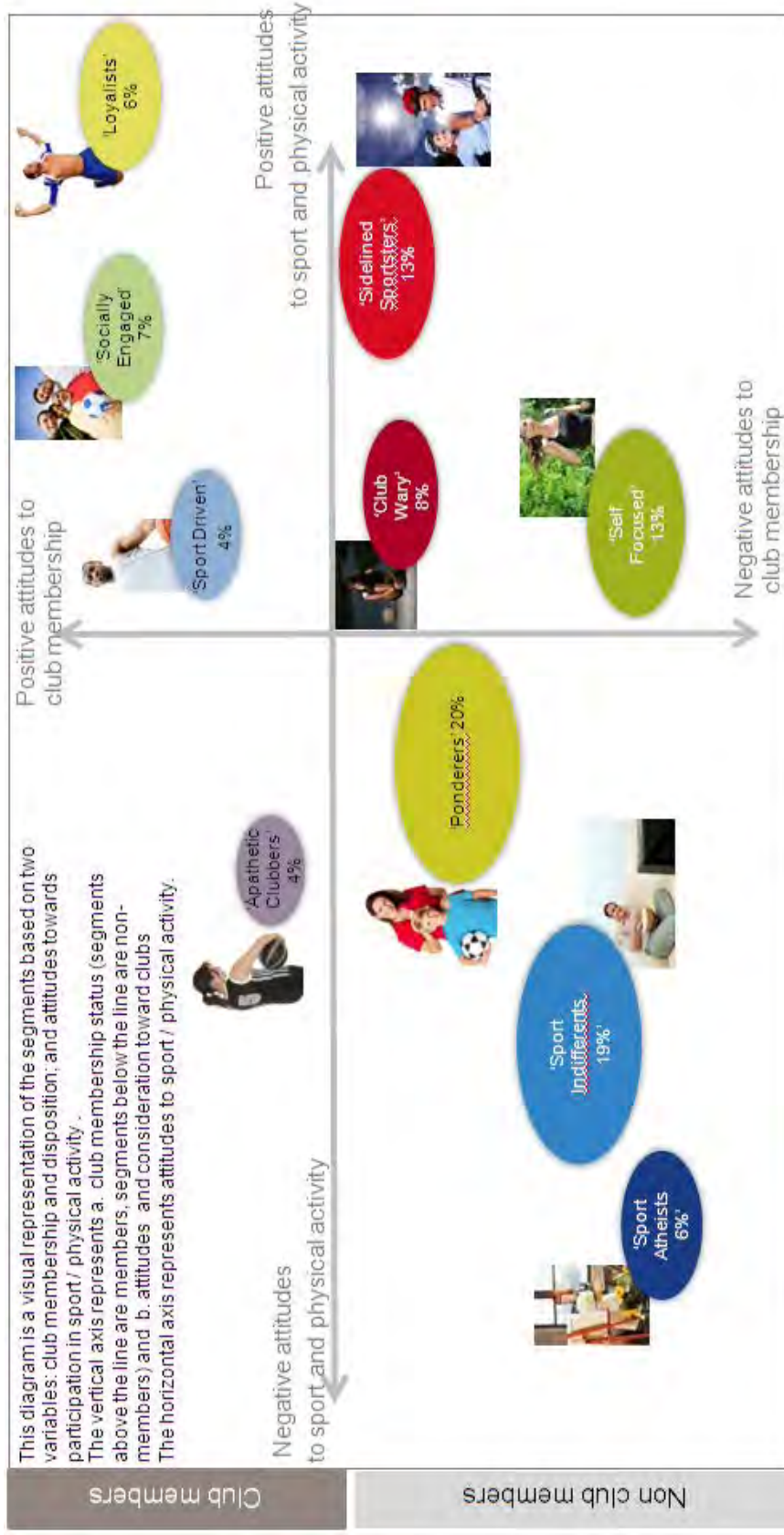
- whether the respondent is currently a club member
- attitudes and behaviours towards clubs
- attitudes and behaviours towards physical activity and sport
- willingness to invest in social networks

There are six really important segments proposed for lawn bowls and a 'one liner' that characterises those in each segment is set out below -

- (1) Bowler - *"I'm a member of a club because my membership provides me with easy access for playing my sport and I'm not that interested in the social side of being a member"*
- (2) Socially Engaged - *"I really enjoy being part of my club sports team but it's as much about having a laugh with my mates as it is about the sport"*
- (3) Consumer - *"I've been playing sport since I was young but clubs are just too competitive now - everyone in a club takes it so seriously"*
- (4) Sidelined Sportsters - *"I really love sport but I don't want to be committed to things like a sports club - I don't really have the time"*
- (5) Club Wary - *"I love my sport but sports clubs are full of 'cliquey' people - I just wouldn't fit in"*
- (6) Ponderers - *"I'd like to find a way to do more exercise and sport but I don't know how to find something that suits my lifestyle"*

Diagram One below is taken from the ASC segmentation report and it plots their different segments into one of four quadrants

- **Q1-Top left** : A club member with negative attitudes towards sport/physical activity and positive attitude to club membership
- **Q2- Top right**: Club members positive attitudes towards both sport and club membership.
- **Q3- Bottom right**: Non members with positive attitude toward sport and negative attitude toward club membership [These are regarded as 'high potential' recruits and number in the order of xxxmillion in Australia.
- **Q4- Bottom left**: - low priority non members.



**Diagram One: Visual presentation of ASC Segments [p. 178]**

This quadrant diagram provides an indication of how the segmentation and change models are able to come together. For example there are several million people in the bottom right hand segment (Q 3) and we want to move them to Q2. The ASC provides an indication of the changes needed by individuals to move from Q3 to Q2 as follows -

**Pre Contemplation**

- Unwilling, would not consider being a member of a sports club / regular organised sport

**Contemplation**

- Understands pros / cons of clubs / organised sport, may think about it, but cons currently outweigh benefits

**Preparation**

- May be experiencing some of the pros of organised sport through other means (eg. recreational centres) or children's sport

- May be considering how to be involved or to keep enjoying the benefits without experiencing drawbacks



**Action**

•Members of a club and enjoy benefits –either social or access to sport facilities –but the club is not a major part of identity

**Maintenance**

- Being a member of the sports club is a major part of identity, whether active sport participant in sport or not
- Embrace all factors of being part of the club

With these steps of change in mind, the ASC report indicates that - *‘Most effective interventions tend to focus on identifying the groups that are looking to change to the desired behaviour, that is, those in the contemplation and preparation stages, as well as acting to reinforce the positive behaviour demonstrated by those in the action and maintenance stages. Overall, the goal is to move individuals along the model towards the positive behaviour’.*

With this background in mind, it is necessary for bowls administrators to consider what mechanisms they can use to -

- identify potential new members
- support existing members becoming more engaged with their club
- induce change to gain new members and retain existing ones

One of the first steps consider necessary is for bowls administrators to fully understand what products and services they currently have and what potential new / changed products and services they would need to induce positive change.

The next section looks at a way of thinking about the core ingredients of existing bowls club product and service offerings.

**A Framework for Thinking About Bowls Products and Services that may induce beneficial change**

What are the ‘dimensions’ of the products and services that bowls clubs [currently and potentially] offer members and new members? In order to progressively align our bowls approach with the overarching ASC model it would appear appropriate to consider the ‘dimensions’ of the bowls offering under two primary headings -

(1) sport and (2) club: these are the ‘x’ and ‘y’ axes shown in Diagram One above.

It is worthwhile to note that each of us makes an assessment of the ‘dimensions’ of a product that interest us as consumers but that the people who make the product need to think about all dimensions, so that they attract the best/optimum customers. For example, when buying a car some people think about ‘colour’ whilst other may think of ‘safety’ or ‘economy’. So what are the dimensions of bowls. After reflecting on what appears to be on offer at the clubs that I know, it appears that the dimensions [broken into two main groups - sport and club] are as follows-

**SPORT DIMENSION**Game Rules/Formats:

Whilst there are many very detailed and varied formats, it would appear that the major element of all formats is the ‘time’ taken to play the game and the ‘manner’ in which the game is played.

Regular Events/Competitions:

The weekly program of events at a bowls club is generally highly structured and depending on the availability of artificial

playing surfaces and artificial lighting, these are mostly structured 'events' that take 3-5 hours during the day.

Bowls Greens and Specific Bowls associated facilities:

- Artificial or natural green
  - Artificial lighting
  - Covering of green [shade/rain etc]
- Special Events/Competitions:
- Carnivals
  - Competitions - Individual participation - Club/District/State/National
  - Competitions - Club participation - District/State
  - Competitions - Team participation - Club/District/State/National

**CLUB DIMENSIONS**

Membership:

- Annual bowls membership
- Annual or multi-year social membership

Attire:

- Formal club
- Formal BA standard
- Mufti

Facilities:

- Bar
- Kitchen
- Functions
- Gaming

Social Engagement:

- Ancillary clubs - cards; travelling bowlers; fishing; bridge etc
- Entertainment

Ancillary:

- Other sports clubs
- Provision for disabled participation
- Provision for youth participation
- Coaching/training
- Bowls provided by Club

Some of these dimensions will be more or less important to different segments and the choices within these dimensions will be, accordingly more or less important. What is clear is that in order to induce change in existing and potential bowlers we need to develop an appreciation of the importance of these dimensions to each segment and further, the 'choices' within these dimensions that would

potentially induce such a change in behaviour.

A starting point for this journey could be to get bowls administrators to identify all of the 'choices' currently available in each of these dimensions in their area of responsibility and to conjecture about the possible 'new' choices that may induce positive change. For example, I know that at my club and in my district there are two primary choices offered by bowls clubs in regard to membership - annual bowls membership [with sub categories for juniors and life members] and social membership [which has no bowls privileges]. Are there other types of memberships being offered by clubs? To what extent would it be feasible/sensible to consider-

- Platinum Membership - for high users to pay a once annual fee covering both membership and green fees?
- Family Membership - for those people with more than one member of the family in the club
- Seasonal Membership- for those who only play a certain time during each year because they participate in particular seasonal events

Attachment One is a Segment/Product Matrix and provides a template for starting the journey of connecting segmentation, change and bowls products and services into a way of building a response to the changing market place in which we are seeking to build bowls - its profile, its membership and its sustainability.

The next step would be for each administrator to 'highlight' the 'hot spots' or 'low hanging fruit' - that is, where can we make the most difference in getting the market to 'change'. It is most likely that the 'dimension' which would induce change in one segment would be different to another. For example, it is unlikely that the product options that would enhance commitment by the 'bowler' segment would be the same as that which would induce a 'club wary' person to join a club. For the 'bowler' segment, the 'games/format' dimension and 'competition' dimensions are likely to be critical. For the 'Socially engaged' this is unlikely to be the most important dimension. Therefore, this next step involves getting some shared agreement across jurisdictions about where the 'priority changes' in DIMENSIONS are warranted for EACH SEGMENT.

Once this is done, work on developing these new/modified product offerings can commence at the same time as seeking to enhance the information available to assist clubs to identify potential new members in each of the non member segments.

#### **Summary**

The purpose of this paper was to -

- put forward a proposal for a single market segmentation model for bowls in Australia
- propose a matrix that brings 'segments' and 'products/services' into the one model and to suggest steps for actioning this matrix.

Whilst very preliminary, the paper has made initial steps to achieve both of these objectives. It is understood that bowls administrators will review this material in late October with a view to agreeing next steps in the process.

Attachment One

PRODUCT/SEGMENT MATRIX FOR LAWN BOWLS IN AUSTRALIA

	SPORT	SPORT	SPORT	SPORT	SPORT	CLUB	CLUB	CLUB	CLUB	CLUB
Segments/ Dimensions	GAMES RULES/FORMATS	REGULAR EVENTS/COMPETIONS	GREENS AND SPECIFIC BOWLS FACILITIES	SPECIAL EVENTS / COMPETITIONS	MEMBERSHIP	ATTIRE	SOCIAL ENGAGEMENT	ANCILLIARY		
BOWLER										
SOCIALLY ENGAGED										
CONSUMER										
SIDELINDER SPORTSTERS										
CLUB WARY										
PONDERERS										

Step One: What is on offer for each segment in each dimension?

Step Two: What are the priority 'dimensions' for each segment?

Step Three: What are the priority 'new products' for the priority dimensions?

## **Attachment Three: Initial Pilot of Market Segmentation in relation to Bowls Club Memberships**

**Notice of Special Resolution**  
**To make changes to the XXXX Constitution**  
**at the xxxxxxxx**

**Background**

Research suggests that there are many different levels of interest in club membership. Some clubs are tailoring their membership offerings to meet these different levels of interest. It is considered that at the same time as attracting people to participate in corporate bowls and other 'barefoot' bowls activities, it is appropriate to provide particular membership packages to offer people who attend these events. This proposal involves two new forms of social membership which we believe may be attractive to potential members.

The changes are proposed against the background of Bowls Queensland undertaking a review of affiliation rules. It is not yet known what impact this will have specifically; however, despite these changes, it is anticipated that NFBC will be able to attract a small but important group of new members.

**Attachment One** sets out the changes [in yellow highlighting] proposed to the NFBC constitution. The changes are designed to provide an opportunity for new members to enjoy different levels of social membership.

**Attachment Two** sets out the proposed arrangements envisaged for the first year of operation of these new categories of social membership.

**Special Resolution to be put to the AGM**

(A) That the Club introduce two new classes of social membership – namely (1) Social Membership Freestyle and (2) Social Membership Barefoot.

(B) That the Club's constitution be modified in line with Attachment One to provide for these two new classes of social membership.

# ATTACHMENT ONE

## 1) Classes of Members

- A. The membership of the Club consists of the following classes of Members:
  - I. Bowls membership. Bowls Members will belong to one of the following sub classes of Bowls membership –
    - a. Ordinary Bowls Membership
    - b. Bowls Life Membership
    - c. Junior Bowls Membership
  - II. Temporary Membership
  - III. Social Membership - Ordinary
  - IV. Social Membership - Freestyle
  - V. Social Membership - Barefoot
- B. Each Member of each class shall be bound by this Constitution as amended from time to time.
- C. The numbers of Members in each class may be limited as the Committee may from time to time determine.

## A. Admission and Rejection [Social Members]

- A. Upon completion of an application, in a form determined by the Committee from time to time, and upon receipt of the application fee amount, as determined by the Committee from time to time, (a) the Club Manager and at least one member of the Committee or (b) any two Members of the Committee, may confer social Membership to the applicant.
- B. There are three categories of Social Membership –
  - a. Social Membership – Ordinary
  - b. Social Membership – Freestyle
  - c. Social Membership - Barefoot
- C. A Social Member – Ordinary shall be entitled to the social privileges of the Club but shall not be entitled to hold any office in the Club nor to take part in, nor to vote at meetings of the Club, nor to nominate persons to membership of the Club, nor to take part in the game of bowls, except on any occasion when persons other than Members may be playing bowls on the invitation of the Committee.
- D. A Social Member – Freestyle shall be entitled to the social privileges of the Club but shall not be entitled to hold any office in the Club nor to take part in, nor to vote at meetings of the Club, nor to nominate persons to membership of the Club. The Social Member – Freestyle may participate in games of social bowls when bowls approved attire is not mandatory but must always wear approved bowls footwear. The Social Member – Freestyle is not eligible to play in Club championships, pennants or other events requiring affiliation to Bowls Queensland.
- E. A Social Member – Barefoot shall be entitled to the social privileges of the Club but shall not be entitled to hold any office in the Club nor to take part in, nor to vote at meetings of the Club, nor to nominate persons to membership of the Club.

The Social Member – Barefoot may take part in bowls games, on occasions when persons other than Bowls Members may be playing bowls on the invitation of the Committee and for self organised bowls events. The Social Member – Barefoot is not eligible to play in Club social bowls events nor are they eligible to play in Club championships, pennants or other events requiring affiliation to Bowls Queensland.

- F. An application for Social Membership may be rejected at the sole discretion of either (a) the Club Manager and at least one member of the Committee or (b) by any two Members of the Committee.



# ATTACHMENT TWO

## Notes to Accompany Change to Classes of Membership

### **Social Member: Freestyle:**

**Annual Fee:** \$45

**Apparell:** Club shirt and approved bowls shoes. Bowls shirt would be purchased from the Club at the time of joining.

**Bowls Activity:** – The Freestyler may participate in games of social bowls when bowls approved attire is not mandatory but must always wear approved bowls footwear. The Freestyler is not eligible to play in Club championships, pennants or other events requiring affiliation to Bowls Queensland. The Freestyler would be welcome to play on Wednesdays and Saturdays social bowls when bowls attire is not compulsory. Also, to participate in othe social bowls events involving visiting bowlers and small events arranged by the Club e.g. Monday night singles.

### **Social Member: Barefoot**

**Annual Fee:** \$35

**Apparell:** No specific requirements.

**Bowls Activity:** - The Barefooter may take part in bowls games, on occasions when persons other than Bowls Members may be playing bowls on the invitation of the Committee and for self organised bowls events. The Social Member – Barefoot is not eligible to play in Club social bowls events nor are they elibible to play in Club championships, pennants or other events requiring affiliation to Bowls Queensland. The Barefooter would be entitled to have roll ups at the Club and to arrange informal games with others. Other participants would be required to pay for their participation at the normal rates if they were not full bowls members, Freestyle or Barefoot members.