

FIT FOR THE FUTURE

BOWLS ENGLAND
2021-2026 STRATEGY
SUPPLEMENTARY INFORMATION

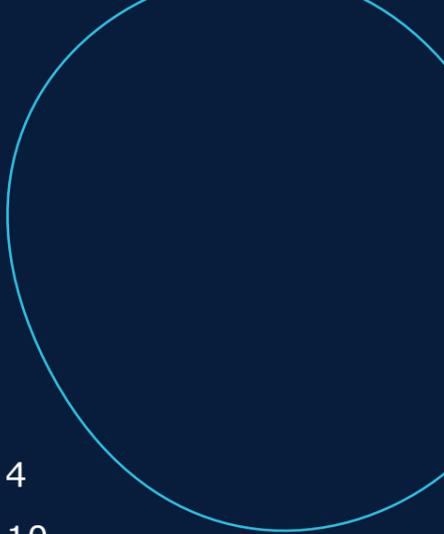
#BEfitforthefuture





CONTENTS

Consultation and Insight	4
Audience - Who Plays Our Sport?	10
Current Participants	13
Future Participants	15
Objectives - Success Measures	16
Build the Brand of Bowls	16
Make Bowls Truly Accessible	17
Create Positive Playing Experiences	17
Support Our Communities	18
Lead With Purpose	18
BE Team	19
Financial Forecast	20



CONSULTATION AND INSIGHT

99% of people know what bowls is



PARTICIPANT SURVEY RESULTS

- **Sociable, friendly, competitive** and **challenging** are words associated most strongly with bowls.
- **Encouragement from friends** was the biggest motivator to take up bowls at an **average age of 43**.
- A higher proportion of those who play social bowls took it up through **attending a club open day**, whereas those who play competitively tended to have played a different sport and **want to stay active**.
- The main reason to be a club member is to **meet and socialise** with people of a similar interest.
- The average amount played per week by current participants is **10 hours, across multiple days**.
- **95%** of people find playing our sport **enjoyable and satisfying** and **74%** are **likely to recommend** the sport to others.
- **Social bowlers** are **less satisfied** that the playing options available to them are **compatible with their lifestyles**.
- **Two thirds** of participants are **interested to hear more** from Bowls England, predominantly **via e-mail/newsletter**.
- A **more relaxed dress code**, getting **younger people** into the sport and **increase of awareness** in the sport are highlighted as priorities.



NON-PARTICIPANT SURVEY RESULTS

- **99%** of people know what bowls is, **38%** would consider playing in the future and **82%** said they could find a local facility.
- Of those interested in taking up bowls, **67%** wish to play once a week or less, **89%** want to play for no more than two hours at a time and on average people would be willing to pay **£5 per session**.
- The **three biggest barriers** to participation in sport are **time, work commitments and family commitments**. Of those who considered playing, not having anyone to play with was the main reason for not taking it up.
- **65%** of people would prefer to **play flexibly** to fit into their lifestyles.
- Compared to other sports, bowls tops the list for association with **'sociable', 'friendly'** and **'inclusive'** but is lower down the list in its association with the words **'exciting', 'energizing'** and **'challenging'**.
- **58%** think bowls is mainly for older people, and **35%** think it is too slow. Despite these potentially negative perceptions, the majority agree that bowls is a sport **suitable for all gender, ages, ethnicities and disabilities**.
- **69%** who are considering trying Bowls said they would be encouraged by Open Days or free trial sessions, with **66%** encouraged by taking part alongside like-minded friends or family members.



CLUB SURVEY RESULTS

- **77%** of clubs membership is stagnant or in decline, and **25%** of clubs state that they are not sustainable at current membership levels.
- **Recruitment** and **retention** of participants are the top two priorities for clubs.
- Over **97%** of clubs have just one adult membership option. There is almost no flexibility for new participants who may not want to commit to a full membership, and under **30%** of clubs facilitate pay and play opportunities.
- Under **20% and 15%** of clubs provide dedicated sessions for juniors and people with disabilities respectively.
- Annual income for the vast majority of clubs does not exceed **£20,000** per annum and the average cost of green maintenance is in the region of **£5,000**.
- Club communication is largely through **phone and email**. Over **30%** of clubs do not have a website and over **60%** do not use social media. Under **20%** use a group chat platform such as WhatsApp.
- **83%** of clubs said they have a sufficient number of volunteers to run their club.
- There is significant support for the **wider use of technology** to assist club management including online rink booking and cashless payments. Assistance with fundraising, health and safety advice and digital media would also be valued by clubs.



'OUR FUTURES' EMAILS

Over 300 emails were sent in by people who wished to share their thoughts and ideas about the future of bowls.

Here are a few sound-bites on the common themes, a full overview is available on our website.

BRAND AND COMMUNICATIONS

- “ There should be a national TV campaign to highlight the enjoyment and satisfaction that can be gained from bowls.”
- “ Look how bowls events are televised at outdoor clubs in Australia. Stands, spectators, stencils on the green all giving a positive sporting experience that might be attractive to TV and sponsors.”
- “ If more people are familiar with the game via media channels and can see the skill and excitement of a close game of bowls, then it will be far easier to attract them through the Club gates on open days.”
- “ There has to be a drive to remove the 'Ageism Tag' levelled at the sport, primarily by the Media.”
- “ We need to big changes in how we promote our sport and breakdown so many old traditions.”

COACHING AND/OR JUNIOR PLAYERS

- “ Unfortunately, Lawn bowls has the preconception that it is a game for 'older people'. Whilst there maybe benefits in 'experience' this does little to enhance the games credibility at a younger level, the very age group we should primarily be attempting to attract to ensure the continuance of the game in UK”
- “ For our junior bowlers, I hope there will be a recognised pathway. With age related competitions and regional bowls development programmed to enhance motivation and commitment.”
- “ Set up a proper coaching scheme for new players to develop skills to progress through clubs to county to as high as they can get. Use a modern approach to coaching including aspects such as psychology, fitness, and preparation.”
- “ There must be a serious effort to create a joint coaching system, we do not need rivalry and after all the collective aim is to provide quality coaching for all bowlers.”

“Take time out to study how other sports attract youngsters to dedicate discipline. Act upon findings.”

PLAYER ACQUISITION AND RETENTION

- “ A nationwide 'Come and Try Weekend' would be an excellent way forward”
- “ I think the outfits are dated and not practical”
- “ Recruitment is vital but the 'Members Only' sign must come down along with outdated dress codes and arguments about shorts and coloured shoes.”
- “ Remove barriers, loosen clothing rules make the game accessible and attractive to a broader base. It is a great sport but some aspects put people off trying it.”
- “ Flat green bowling is an old sport traditionally played in this country by the older generation. For the sport to stay alive let alone expand we need to change this picture of the game.”
- “ One of the most important aspects of one wishing to take up the game of bowls is that both genders can play the same game as equals. I believe in attempting to persuade non bowlers to take up our sport, this is forgotten and not flagged up nearly enough.”
- “ I am of the opinion that whilst there should be leagues where men or women only compete, there should be much more emphasis on mixed league matches.”
- “ We do not extol the virtues of the game, fitness aspects, to maintain body movement, the current topic mental wellbeing, as being a member of a club and participating at any level or age gives you a reason to get up and out of the house.”
- “ Bowls clubs are ideally placed within their communities to provide exercise and nutrition classes. Why not get some experts to put together classes to address obesity, call it "Bowlacise", and get people down to their local clubs?”

“I feel more time and ideas are needed to try to raise the awareness of the 40, 50 and 60 to the game of bowls.”

- “ Currently you have the prospect of 3hr plus matches which for most newcomers to the sport is a complete no go area in a time when many potential new members will live time poor lives.”
- “ I think we need to look at a similar version to cricket's 20/20 or 50 over to initially attract a new breed of players to hopefully convert to our traditional game.”
- “ A typical game of bowls normally takes at least 3 hours; add travelling, changing, and post-match time into the equation and we find players are committing 5+ hours for a game; this has always been a point of dispute within my family.”
- “ Get music playing and create a better atmosphere, like Australia”



VOLUNTEERING/GOVERNANCE

- “ Trouble with our sport is that the councils are shutting a lot of greens down.”
- “ Structures have to be simplified, be more collaborative and less bureaucratic.”
- “ The average age of our present membership is nearer 80 than 75. This would be ok except that most, having spent a lifetime working, just want to enjoy a game of bowls and a chat in the bar afterwards. Few have any interest whatsoever in helping to manage or run the club.”
- “ I would like the younger members which play for country and national teams which we support get involved in getting younger people to take up the game and get involved with running clubs.”

BIRMINGHAM 2022

“Being a home games we would hope that bowls gets more TV and general media coverage. Media coverage in particular TV is critical in showcasing what our sport has to offer.”

- “ It’s important everyone, members, clubs and counties are on-board. We need a national strategy where we are all ‘singing from the same hymn sheet’”
- “ CG showcasing our sport only once every four years we do need a high profile product every year to showcase to the media and very importantly keep bowls in the minds of the public not just once every 4 years but every year.”

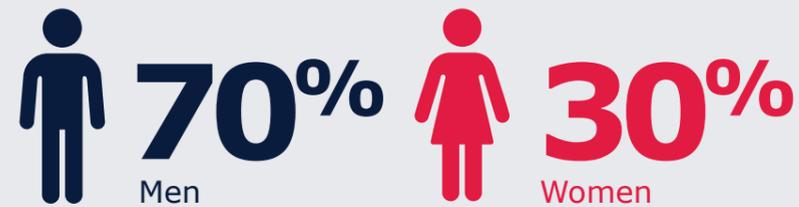


AUDIENCE

WHO PLAYS OUR SPORT?

Bowls participants are predominantly white males aged 65 or older

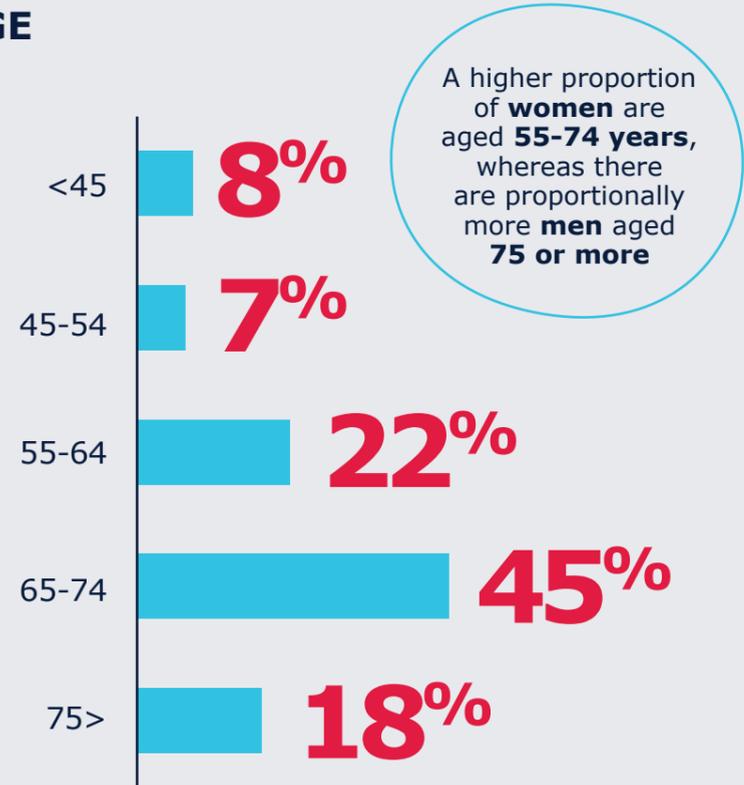
GENDER



ETHNICITY



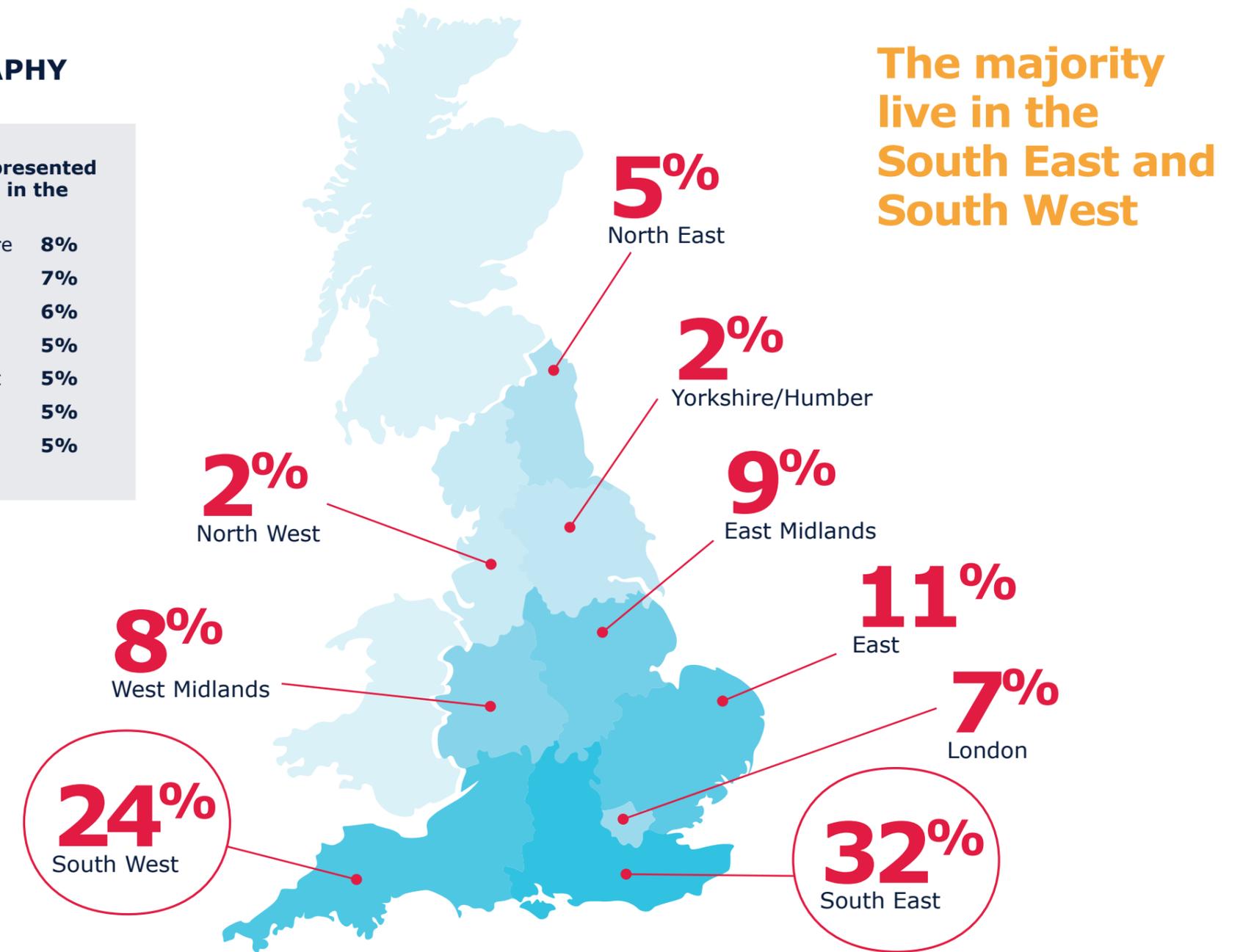
AGE



GEOGRAPHY

Most represented counties in the survey:

Hampshire	8%
Kent	7%
Essex	6%
Devon	5%
Somerset	5%
Surrey	5%
Sussex	5%



HEALTH



27%

have health conditions, impairments or illnesses



30%

of these, the health conditions have a **substantial impact** on their ability to play bowls

LIFESTYLE



enjoys walking

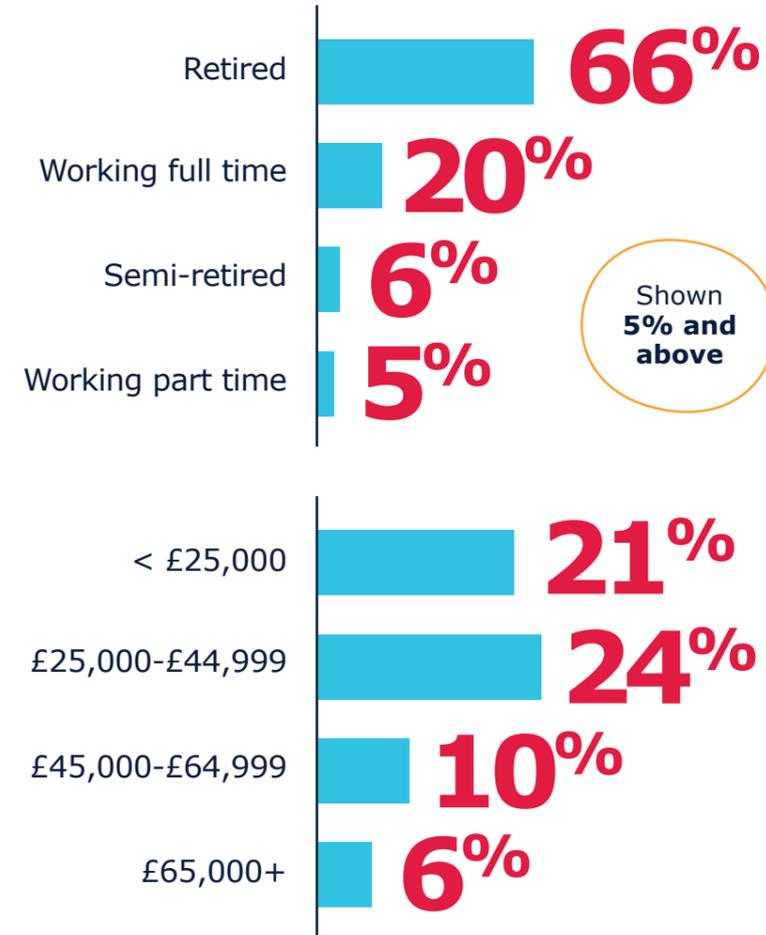


enjoys watching sport



enjoys gardening

EMPLOYMENT AND HOUSEHOLD INCOME



Two thirds are retired, 1 in 5 works full time

CURRENT PARTICIPANTS



Club Bowler Brian

One of 75,000 bowlers who play competitively within clubs

- About:** Brian is self-employed with grown up children who live locally. He walks the dog every day and never missed an England football match on the TV.
- Bowls:** He attended an Open Day a few years ago at his local club and now plays three times a week, including club matches. He loves the challenge and a beer after the game.
- Motivation:** He enjoys the challenge, getting out of the house and, whilst he wouldn't show it, likes the feeling of winning.
- This strategy will...** Help clubs provide the best possible experience for every day players, make him feel proud of his sport and provide more ways to make the most of it.



Social Bowler Sue

One of 10,000 bowlers who play casually

- About:** Sue is recently retired and enjoys spending time with her grandchildren and taking part in quizzes at her local pub.
- Bowls:** She plays a couple of times a week and tries to attend all the club events with her husband.
- Motivation:** She values the friends she has made through bowls and loves the atmosphere at the club.
- This strategy will...** Make it easier for people like Sue to play our sport and help clubs attract more social players.



Competitive Chris

One of 20,000 bowlers who enter competitions national or local competitions

- About:** Chris lives with his wife who also bowls. They have a child and both work so life is busy. He enjoys meeting up with friends and his annual trip to the races.
- Bowls:** He took up bowls because his grandparents played and has been hooked ever since. He plays in all the competitions and is teaching his son to play.
- Motivation:** He enjoys the thrill and notoriety of winning, and spending time with some great friends he's met through bowls.
- This strategy will...** Improve the competitions Chris plays in so he is stretched and rewarded, and enhance his experience at national events as a player and spectator.



Club Leader Linda

One of 5,000 volunteers with leadership roles at clubs

- About:** Linda's is a retired teacher, has four grandchildren and, as well as running her bowls club, volunteers on the local parish council. If you want something done, ask Linda.
- Bowls:** Linda doesn't play too much these days as spends most of her time helping manage the club and arranging club social events. She enjoys supporting her daughter in local competitions.
- Motivation:** She enjoys making a difference and being at the heartbeat of community activity. She likes to keep busy and bringing enjoyment to others.
- This strategy will...** Make Linda's life easier providing valuable support to help her and her colleagues manage club affairs.



FUTURE PARTICIPANTS

 **Volunteer Vic**

One of 15,000 people who help out in some way to help the club run

- **About:** Vic is a retired civil servant whose children live all over the country. He spends time on his allotment and enjoys doing the daily crossword.
- **Bowls:** He has played socially for the last 20 years and has plenty of stories. He helps with the greens a few mornings a week and gets roped into work on the bar.
- **Motivation:** Vic enjoys staying active and contributing to the club. He treasures the friends he has made and the appreciation he receives from his efforts.
- **This strategy will...** Provide volunteers with information that can help them perform their jobs better and will help clubs recruit, retain and reward more people like Vic.

 **Supporter Sandra**

One of 50,000 people who support their loved ones to enjoy the game

- **About:** Sandra's husband and son play at their local club. When not working or at the side of the bowls green, she enjoys baking and WI events.
- **Bowls:** She's never played the game but enjoys watching it with other supporters. She always checks the latest bowls news online or in the local paper.
- **Motivation:** She gains enjoyment from seeing her family enjoy the game, and the sense of belonging that comes with being part of the group that supports them.
- **This strategy will...** Help ensure her family are deriving as much benefit as possible from bowls and provide more opportunities for Sandra to watch the sport on TV.

 **Junior Jess**

One of tens of thousands of 8-13 year olds who fancy playing sport but don't fit the sporty mould.

- **About:** Jess doesn't play sport but knows about it through a grandparent. She works hard at school, spends time with friends and watches YouTube too much for her parents' liking.
- **Motivation:** She likes the idea of giving a new sport a go and making new friends. Her mum and dad like the idea of Jess being active outside, enjoying a new hobby and building her life skills.
- **This strategy will...** Help clubs provide a fun, safe and engaging first experience for Jess. It will help her get the support she needs to fulfil her potential and provide her with bowls content and inspirational role models.

 **Sporty Sarah**

One of hundreds of thousands of 40 and 50 year olds who love sport and looking for a less physically demanding sport.

- **About:** Sarah has a husband and two teenage children. She has always loved sport, although she's given up because of the stress on her body. When not busy with family and work, she enjoys a glass of wine or two with friends.
- **Motivation:** She loves the sports club environment when she's supporting her children. She wants to get back into sport for the challenge and buzz, but it needs to fit around her busy life. She can imagine playing bowls more as she gets older.
- **This strategy will...** Change Sarah's perception of bowls and make it an attractive proposition. Provide fulfilling competition and community environments for her will be excited to bring your family to.

 **Casual Kabir**

One of millions of 40 and 50 year olds with more leisure time as their children have grown up.

- **About:** Kabir has always liked sport but never been too good at it. He keeps fit by swimming, and enjoys eating out with friends and holidays with his wife.
- **Motivation:** With the extra time on his hands, he's keen to start a new, fun activity which is easy to start and allow him and his wife to socialise with new people. He's still working so can only commit once a week but imagines playing a bit more when he retires.
- **This strategy will...** Raise the visibility of bowls to inspire Kabir to see it as a credible option. Provide casual opportunities for him to play and make it easy for the club to embrace him as a member.

 **Mature Mike**

One of millions of 60 and 70 year olds who have retired and want to stay active

- **About:** Since retirement, Mike watches more television, enjoys spending time in the garden and visits National Trust sites with his wife. He enjoys weekends away seeing his grandchildren.
- **Motivation:** He's keen to try a new hobby and wants to get more involved in the local community. He feels bowls will be good exercise, a great challenge and a new social scene for him and his wife
- **This strategy will...** Ensure bowls clubs are more flexible, visible and accessible. Help clubs provide a great experience for Mike and support for him to give back as a volunteer.

OBJECTIVES

SUCCESS MEASURES

Driven by our core purpose, shaped by the insight and taking on the key challenges, we have identified 5 priority areas. These objectives, and the strategies to deliver them, turn our recurring challenges into opportunities. They are detailed here alongside how we plan to measure success.



BUILD THE BRAND OF BOWLS

We will measure this by the sport's reach amongst identified target audiences and the levels of positive public sentiment towards our sport.

At a more detailed level, this will include:



The **perception** of our sport through survey findings



The increase in **media coverage** outside our owned channels



The **exposure** of the international squad at high profile events



The level of **interest** in bowls during Birmingham 2022 and the numbers trying our sport.



The **legacy** of Birmingham 2022 in terms of **people watching** our major events.



MAKE BOWLS TRULY ACCESSIBLE

We will measure this by the number of new people engaging with our sport and the diversity of our sport's participant-base.

At a more detailed level, this will include:



The **development** and uptake of four new participation products.



Use of a **national booking system** and number of clubs which operate websites and social media.



The numbers of **new players** trying our sport for the first time.



The volume of **women, ethnic minorities, children** and other under-represented groups playing bowls.



Five meaningful **strategic partnerships** secured.



CREATE GREAT PLAYING EXPERIENCES

We will measure this by the satisfaction levels and net promoter score of its participants.

At a more detailed level, this will include:



The percentage of clubs with membership systems and a **mixed membership offer**.



The number of entrants to **competitions** and the quality of experience of players.



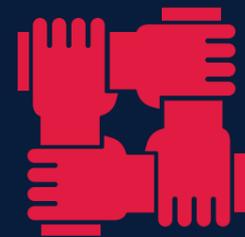
The **volume of tickets** sold to the National Finals and the experience of spectators and players.



A **Player Pathway** established and the quality of experience of junior players in the system.



The volume of participant data and the level of engagement with our **digital and social content**.



SUPPORT OUR COMMUNITIES

We will measure this by the number of engaged volunteers and participant feedback on volunteer delivery.

At a more detailed level, this will include:



The numbers of **engaged affiliated clubs** and the level of satisfaction of club leaders



Facility strategy in place and protection of greens in identified risk areas



The number of **qualified coaches** and levels of player satisfaction in coaching



The number of **qualified officials** and levels of player satisfaction in officiating



The number of **volunteers** and both their and players levels of satisfaction



LEAD WITH PURPOSE

We will measure this by the reputation and levels of confidence our stakeholders have in Bowls England.

At a more detailed level, this will include:



Levels of **confidence** amongst key identified stakeholders in Bowls England's governance



The percentage of **commercial revenue** generated as part of our annual turnover



The level of **digitalisation and efficiency** in our business processes

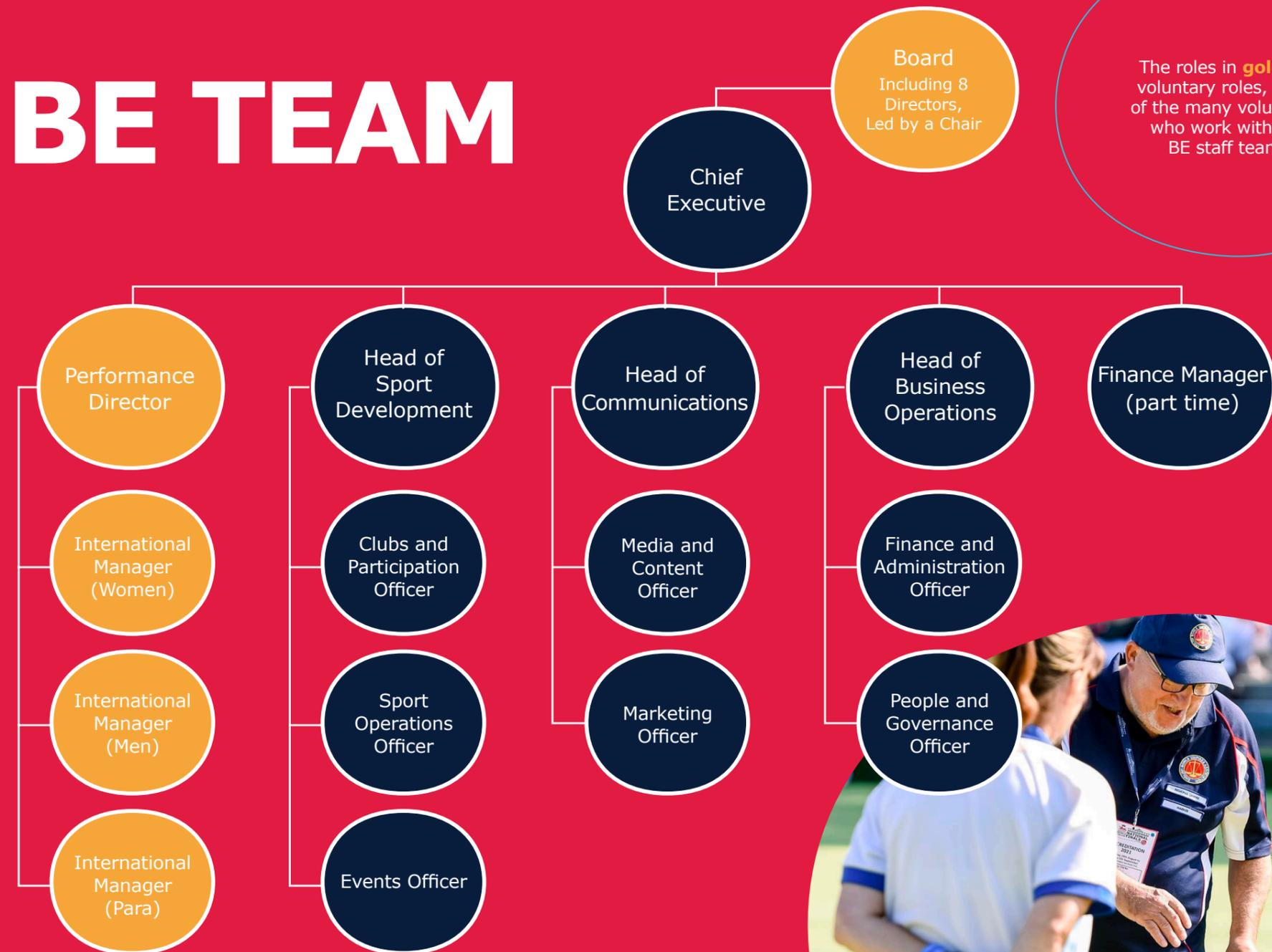


The levels of staff and key volunteer **satisfaction**

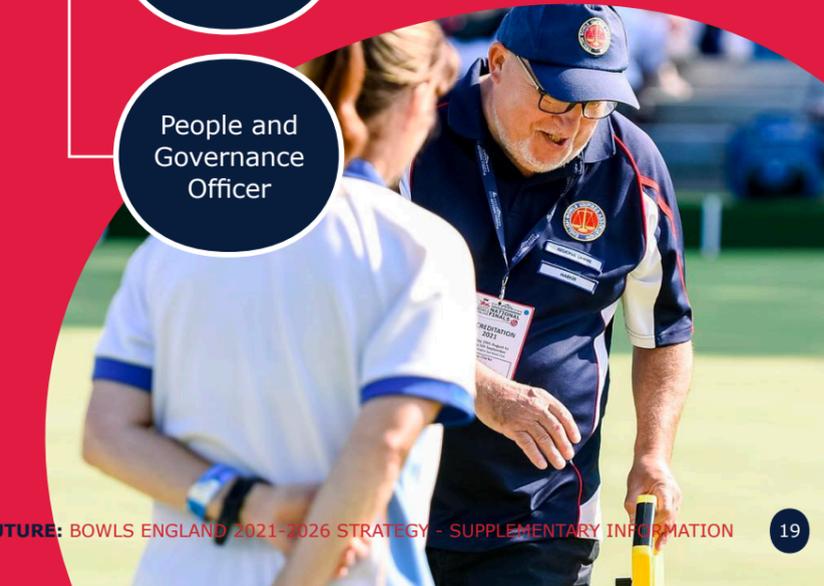


The **quality of relationships** with identified stakeholders

BE TEAM



The roles in **gold** are voluntary roles, some of the many volunteers who work with the BE staff team.

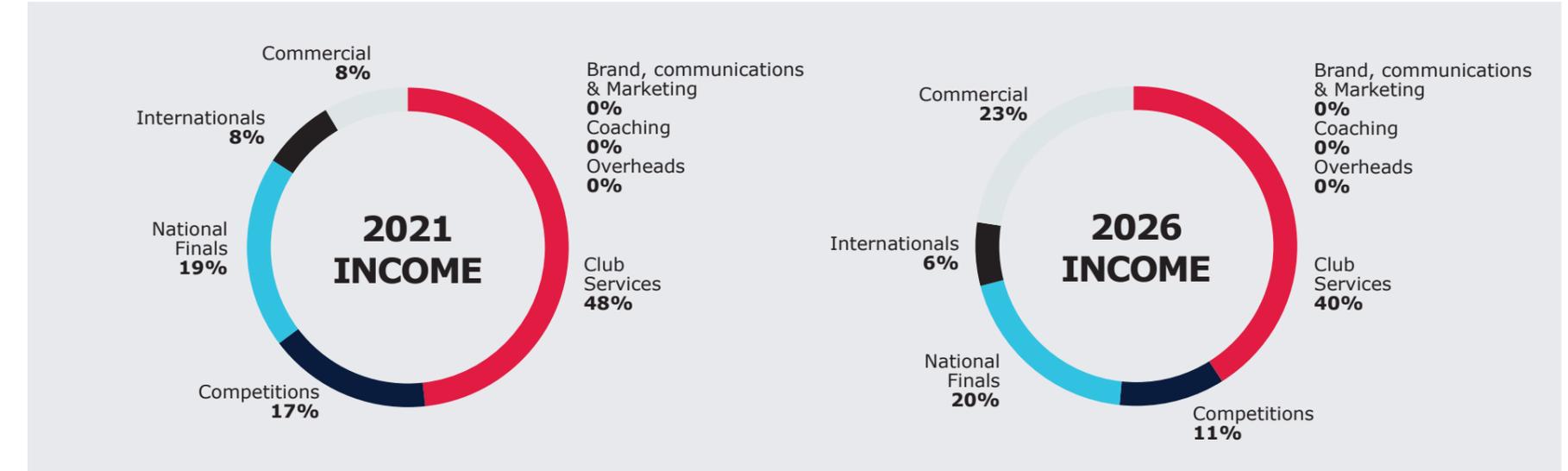
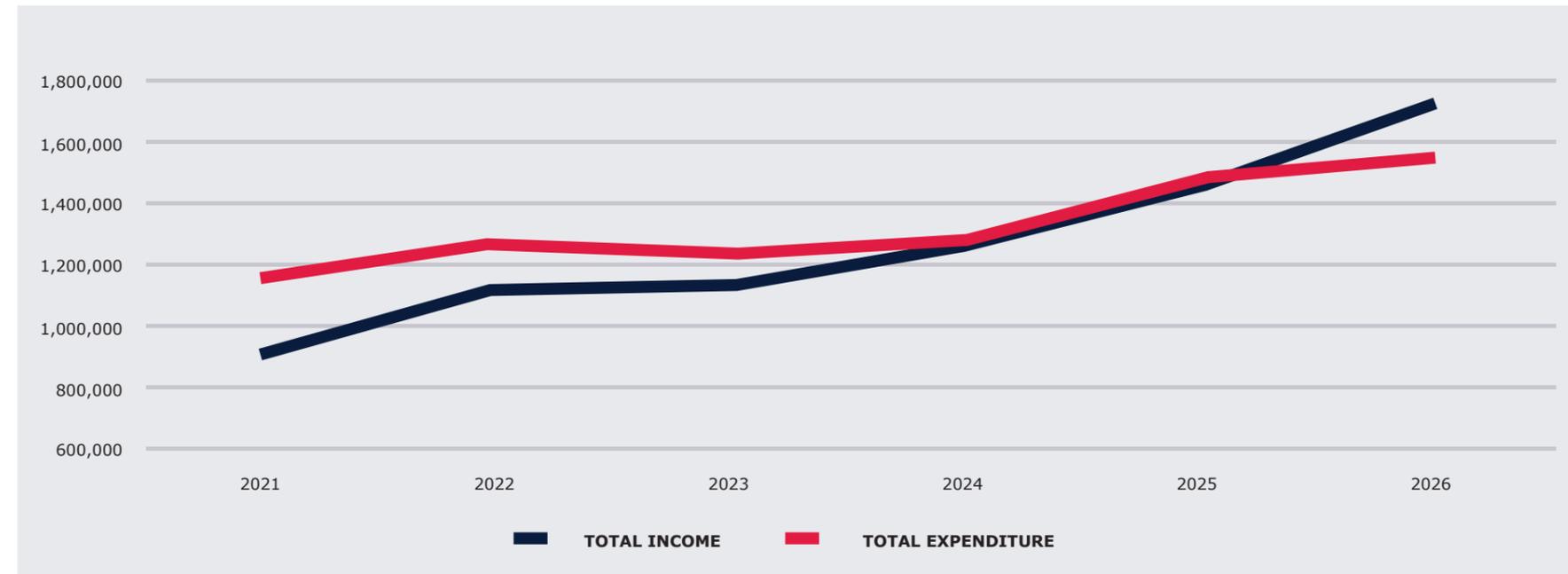


FINANCIAL FORECAST

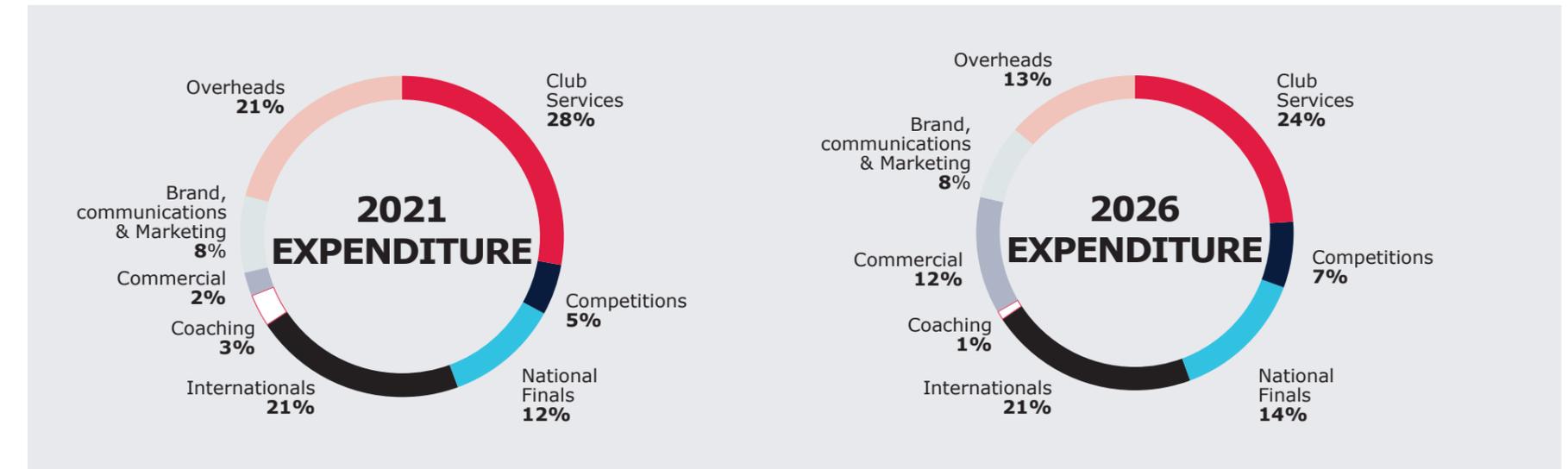
Our Strategy for the next 5 years will see some changes to the volume and sources of our income and expenditure as we invest in developing and promoting our sport and developing new income streams.

This will see changes in the sources of our income as we aim to grow our commercial income and event related revenue streams, and become less reliant on affiliation fees and competition entry fees:

PROJECTED INCOME AND EXPENDITURE 2021 - 2026



Where we spend will also change due to costs associated with new income generation and making the National Championships more of a spectator event. We also hope to reduce our subsidy of Coach Bowls.



Full details of the 2019/20 Statutory Accounts are available on the Bowls England website.

**Thank-you for taking the time to digest our Fit for the Future strategy.
If you want to stay connected with progress, please sign up to our
e-newsletters and follow Bowls England through our social media platforms.**



Bowls England is the national governing body for the sport of lawn bowls.

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Instagram: bowlsengland

YouTube: BowlsEnglandTV

Email: enquiries@bowlsengland.com

WWW.BOWLSENGLAND.COM

VAT No: 926 4696 86

Registration No: 06297656 (England & Wales) Limited by Guarantee

Registered Company Address: Bowls England, Riverside House, Milverton Hill, Royal Leamington Spa, CV32 5HZ