



# ABF Marketing Survey Jan 2018



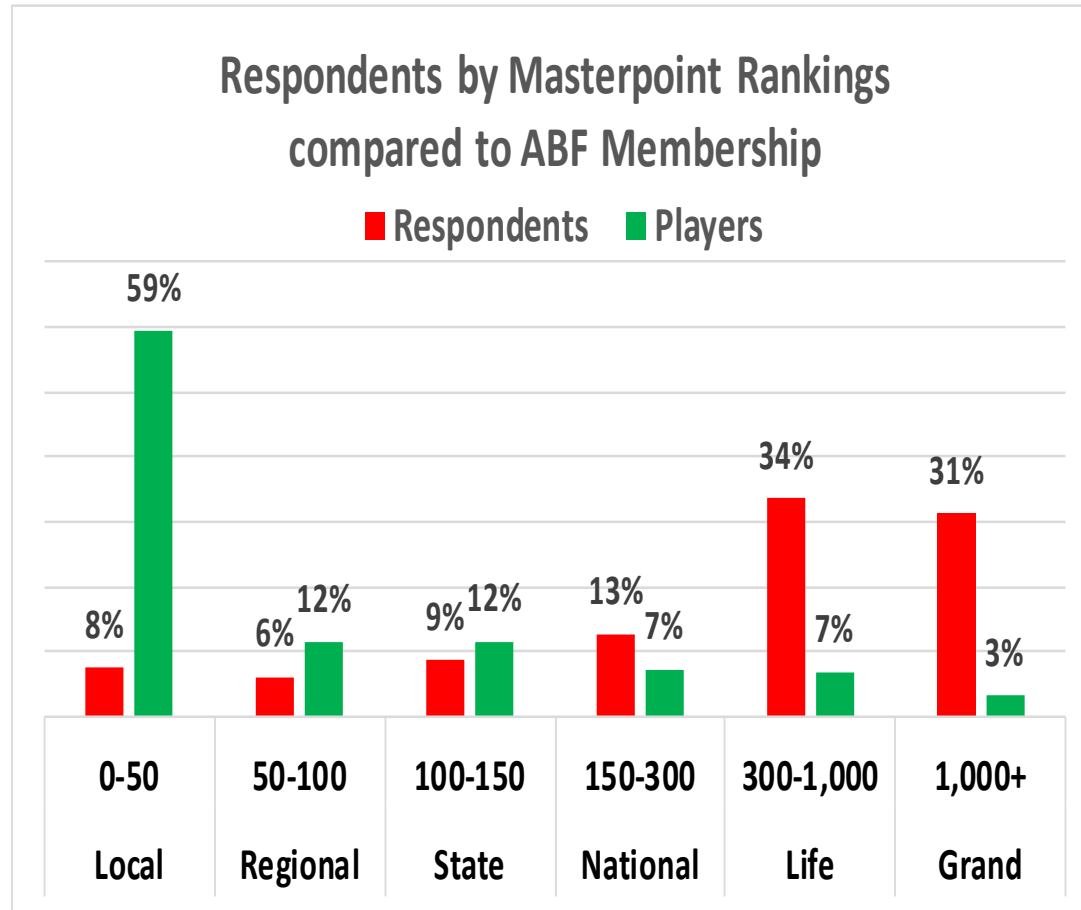
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# The ABF Marketing Survey was of bridge players who had attended major congresses and were largely “tribal” members of the bridge community

- The objective of the survey was to get to know more about our members, their views on a number of aspects of bridge and what they want out of bridge
- The ABF Marketing Survey was conducted online in January 2018 and was distributed to 1,700 email addresses on the Pianola Events database which after 3% incomplete deliveries was reduced to 1,650
- The email addresses were provided by the players to Pianola at mostly two major Australian congresses in Canberra or the Gold Coast - This is separate to the Pianola club database of about 60 clubs in Australia which includes all club members
- It is important to understand that this database was of those who attended Congresses which is a relatively small *fanatical* part of our “tribe” – 70% provided their name and 56% provided additional comments
- There were 512 respondents or a response rate of 31% which is a very high response rate compared to industry average of 10% -14%
- Only 16 respondents or 1% had less than 100 Masterpoints compared to 70% of ABF members who have <100 MP
- The next survey ABF Marketing conducts will be to see bridge through the eyes of those players with less experience and the trials and tribulations of becoming a better player
- Where relevant comparisons have been made to the responses to the research at the 2011 SFOB with only a third the number of respondents

The Survey respondents were largely tribal players with large collections of masterpoints and play in many congresses The highest ranked named responder was Ron Klinger with 11,000 MPs

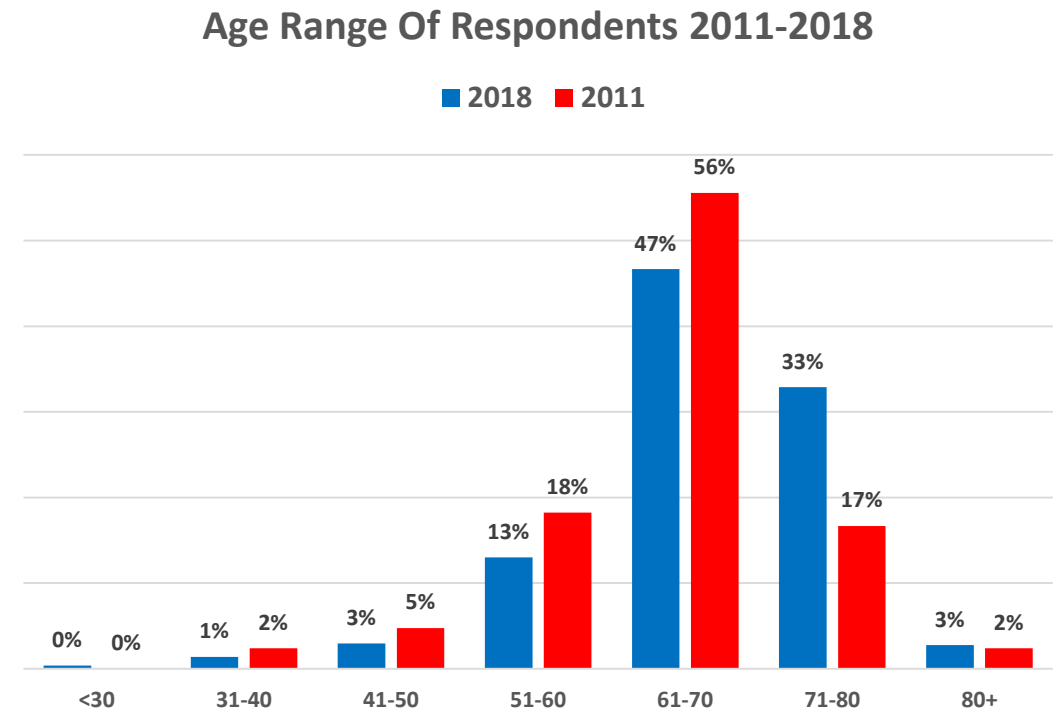
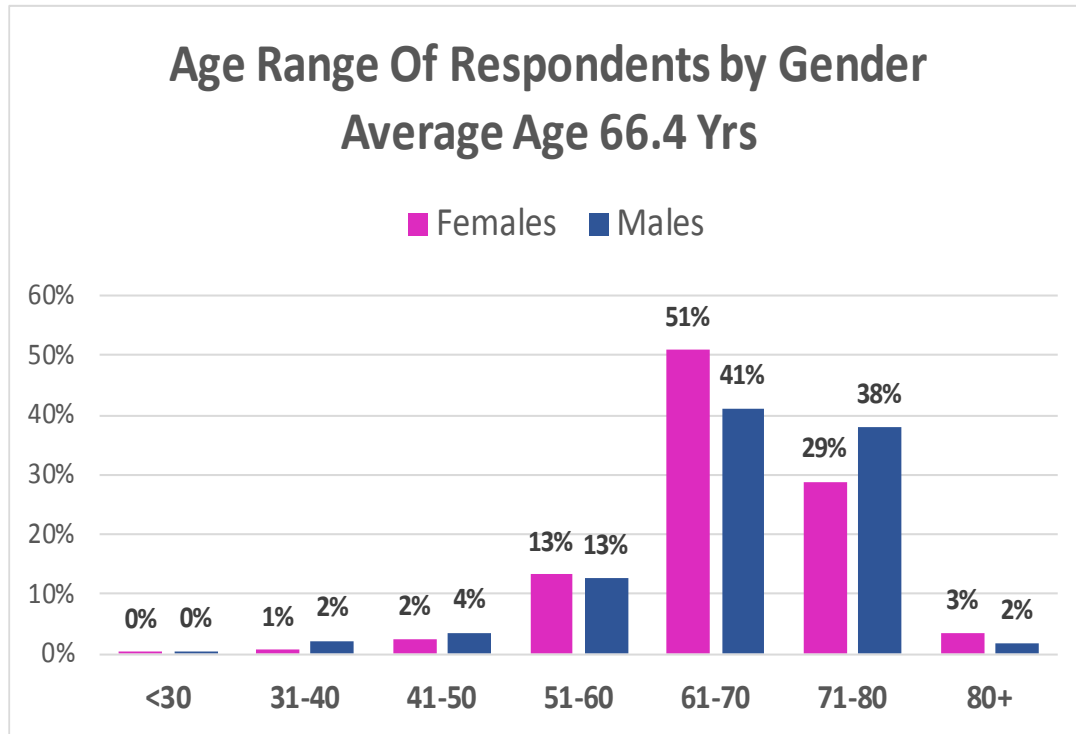


- The email database was from those who registered with Pianola at either the SFOB or the GCC
- 65% of respondents had over 300 masterpoints and were ranked Life or Grand
- Nearly a third have in excess of 1000 masterpoints
- The highest ranked named responder was Ron Klinger with 11,000 MPs
- Players with less than 100 masterpoints make up 70% of ABF affiliated bridge players but only 14% of the respondents to this survey

# Bridge players are mostly aged between 50 and 80 with an average age of 70 in Australia and the United States

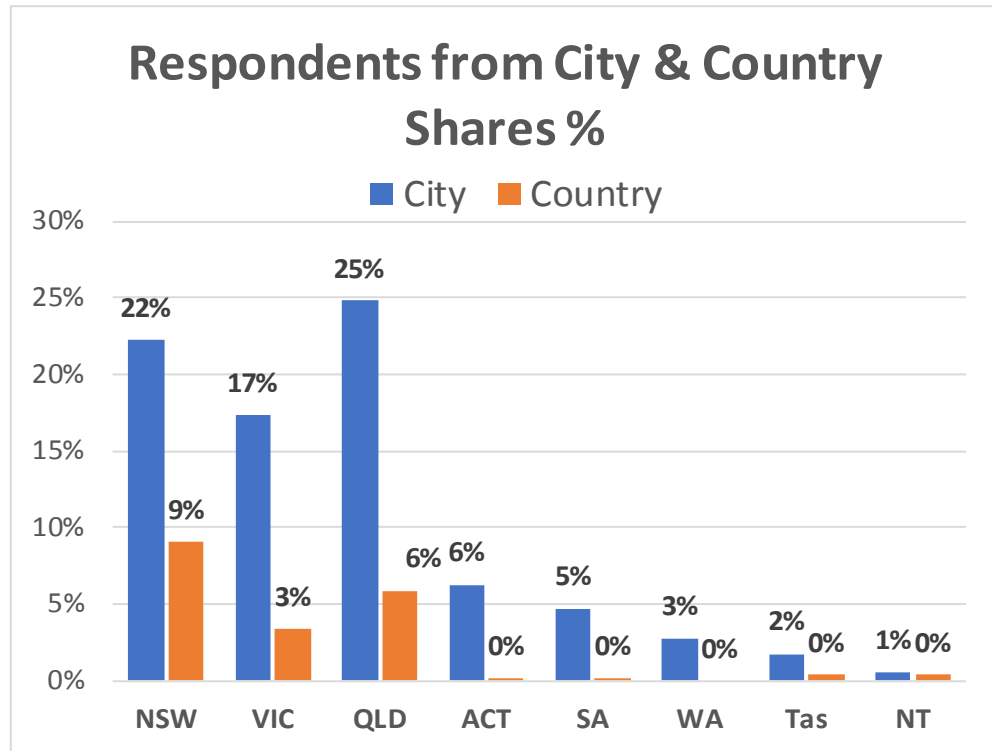
**Congress players are slightly younger than average bridge players at 66.4 years**

**The average age of bridge players has been growing at half a year each year**

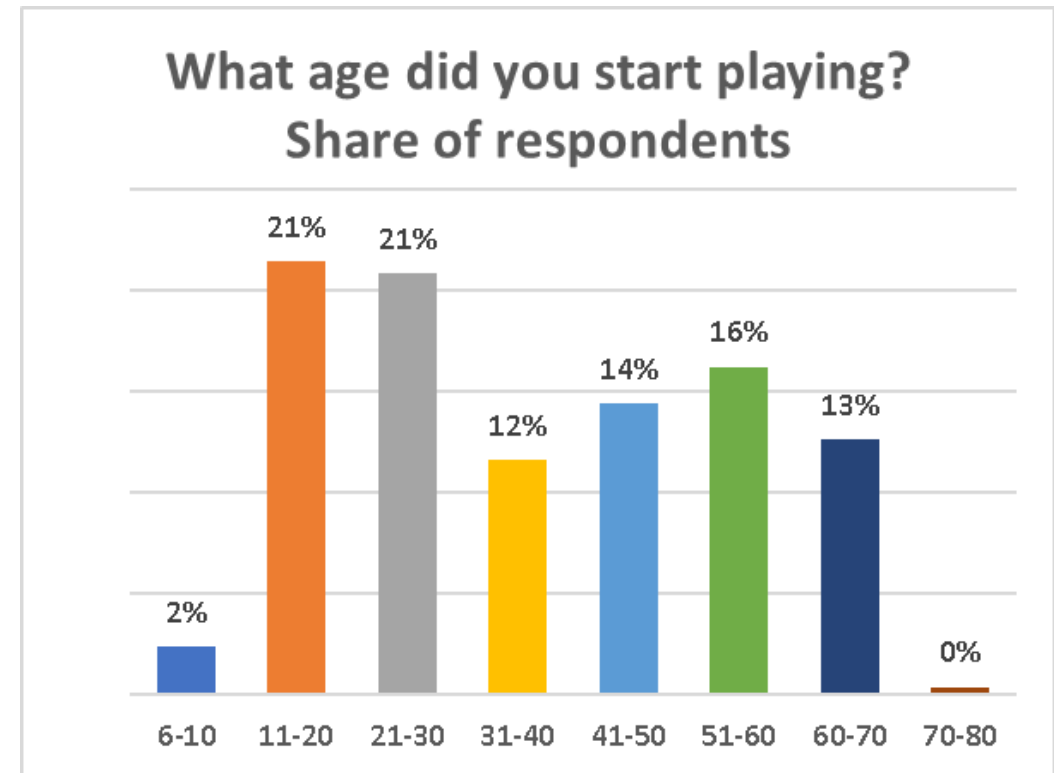


# If people are now learning bridge in their older years will they be as competitive in the future?

81% are from the cities and the largest shares from the state in which the event is held



45% of the current generation of most experienced players learnt bridge when they were under 30

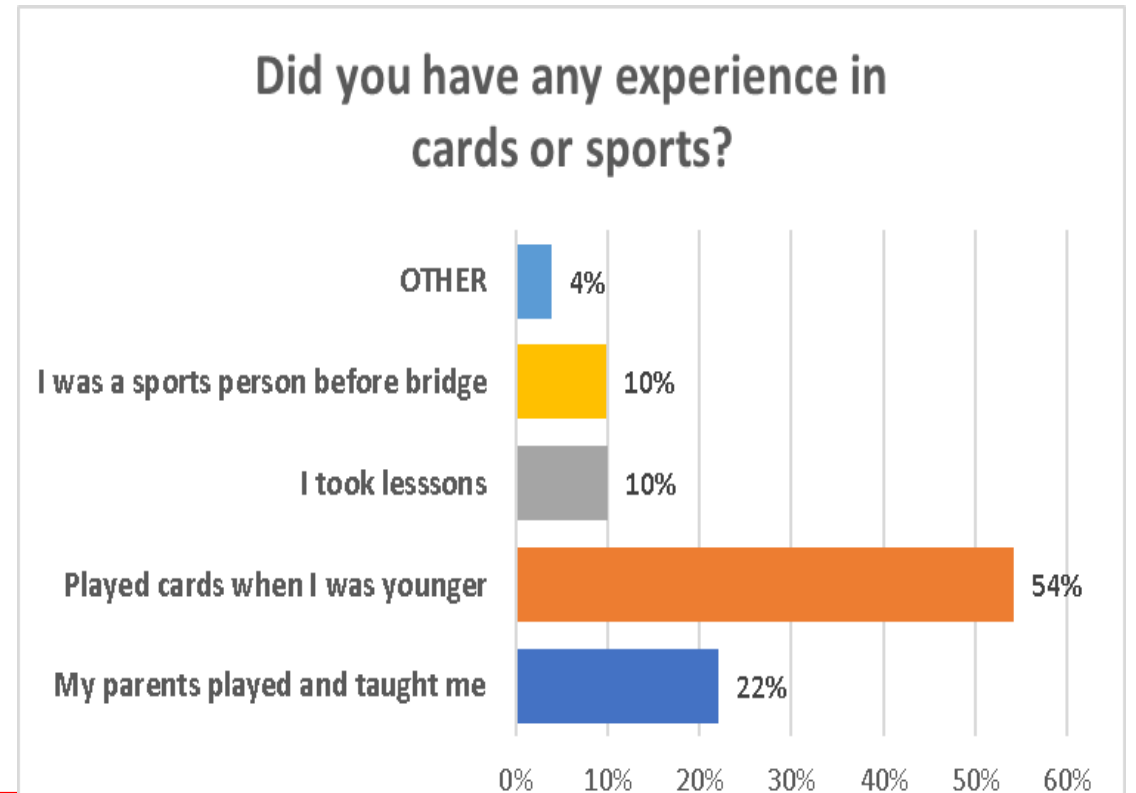
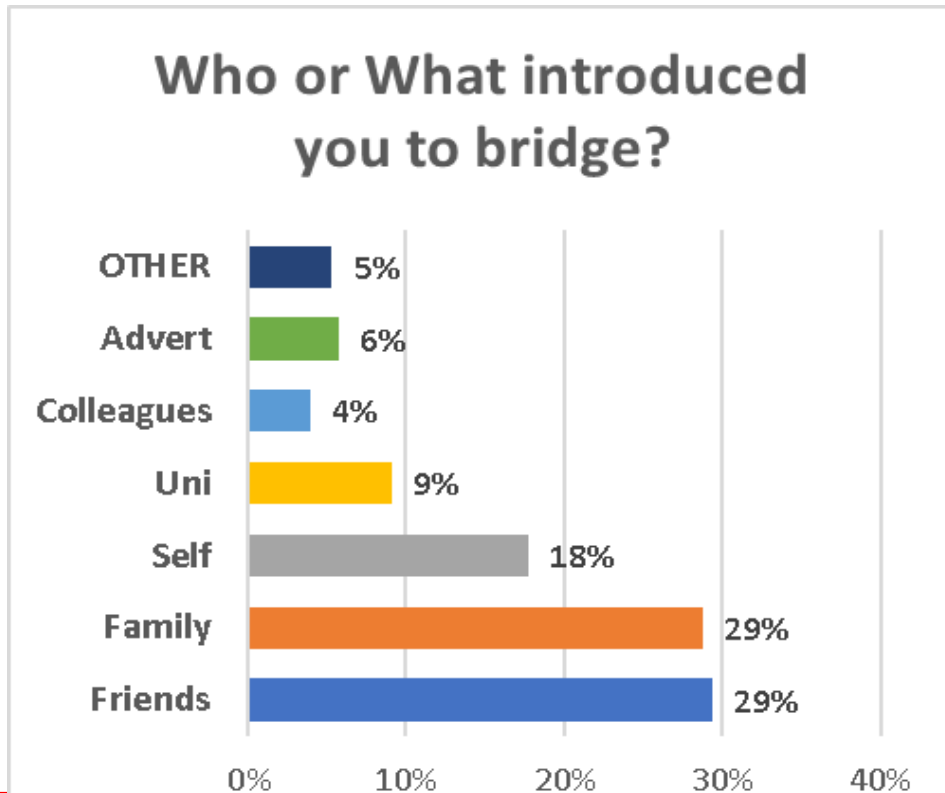


# In the US there is concern that bridge is now not being passed on from earlier generations as it was in the past

Nearly 70% of today's leading players learnt from family, friends and University. Since 2011 Family & friends have dropped and Self has increased.

Who will they learn from in the future?

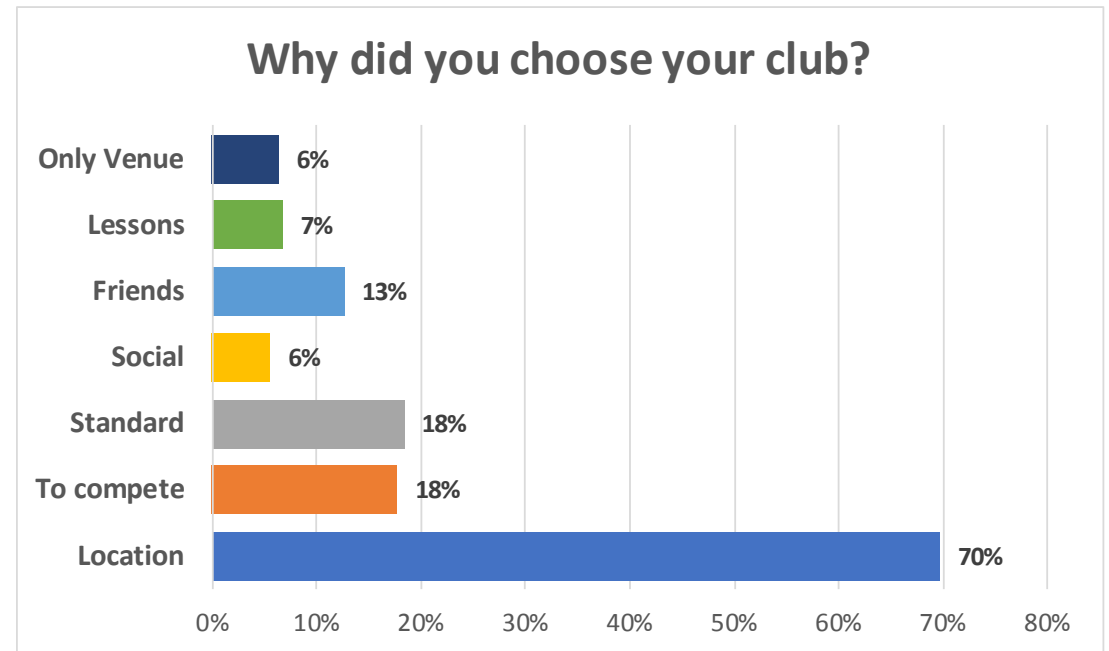
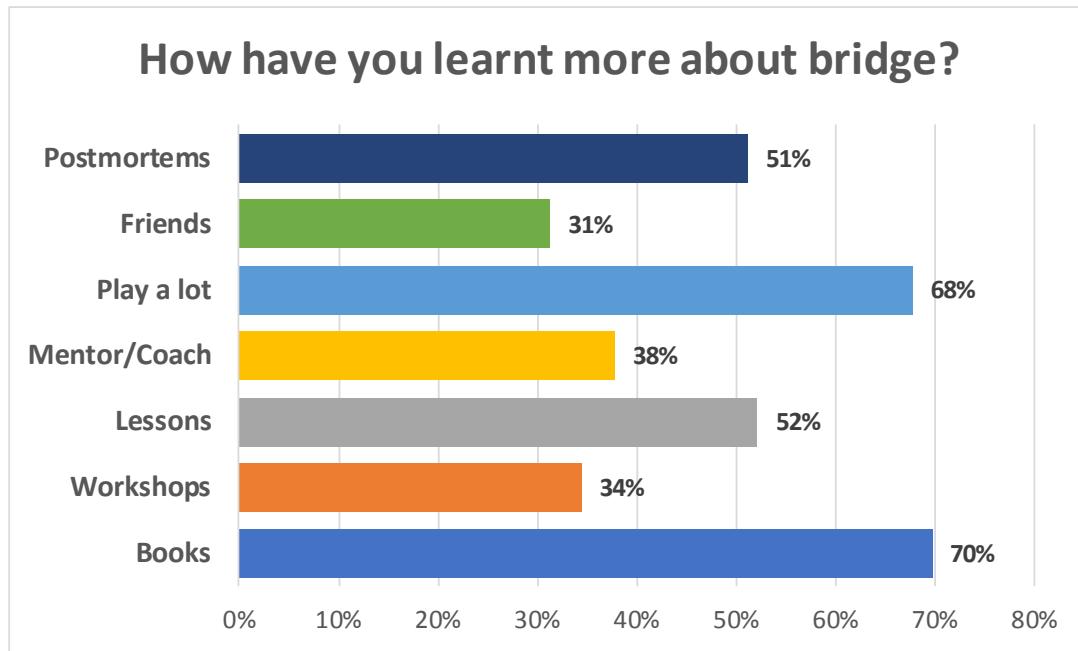
If card games are being replaced by video and e-Games then it becomes more difficult to attract youth players



# Location is the number one reason for choosing a bridge club to play regular bridge. Competitive standards important to top players

There are a number of ways to improve your bridge led by books, playing a lot, lessons and post mortems

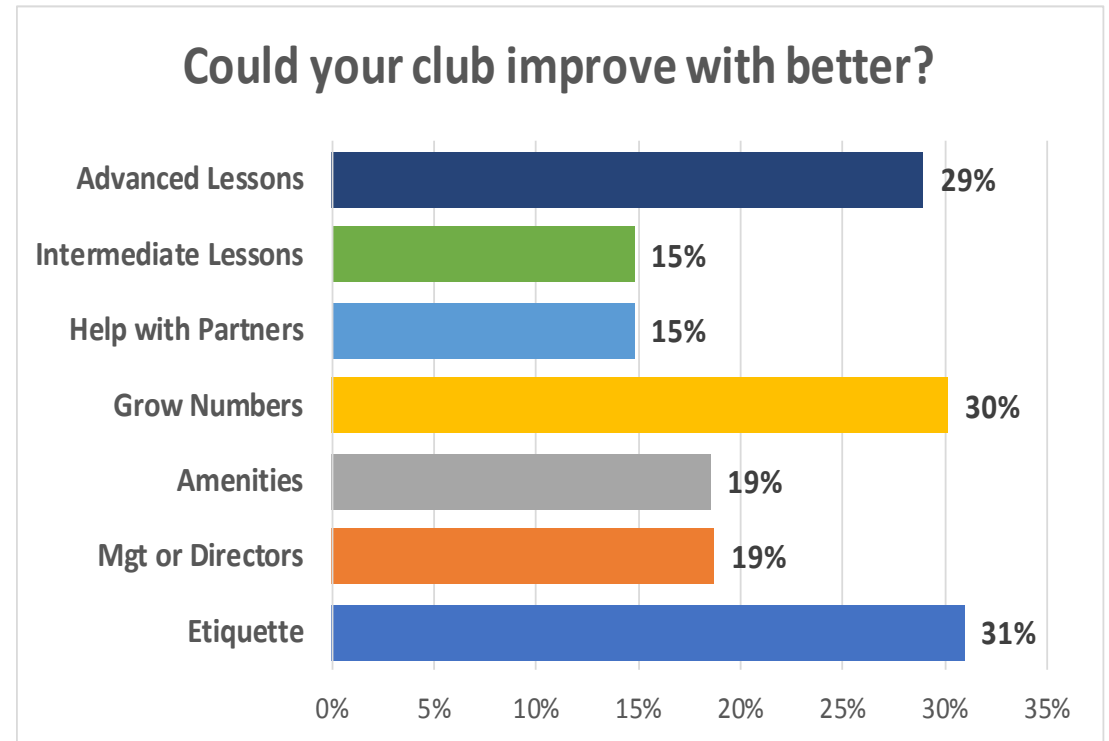
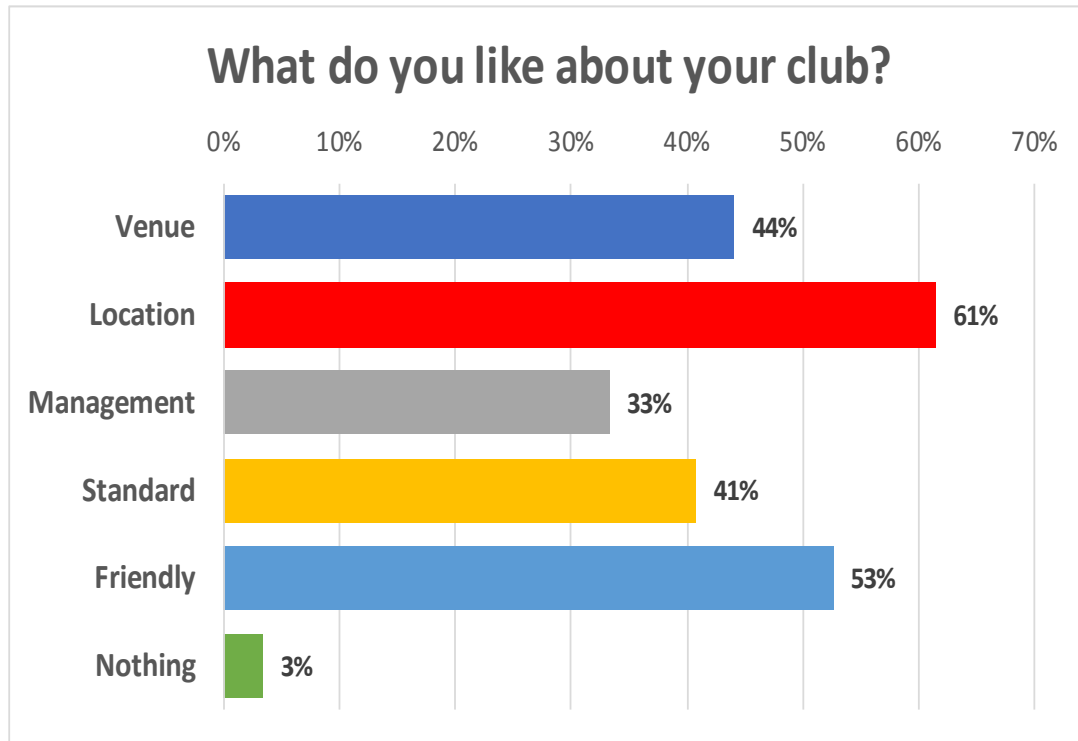
70% of players chose their club by Location. Congress players are motivated by competition and high standards but this would not be so important to beginners



# Improved management of player behaviour, advanced lessons and more players are the most sought improvements by clubs

Friendliness and venue are most important factors besides location for clubs – Friendliness has fallen from 2011 Survey

Players believe clubs can improve clubs in a number of ways – Improvements in Etiquette and need for growth have increased since 2011

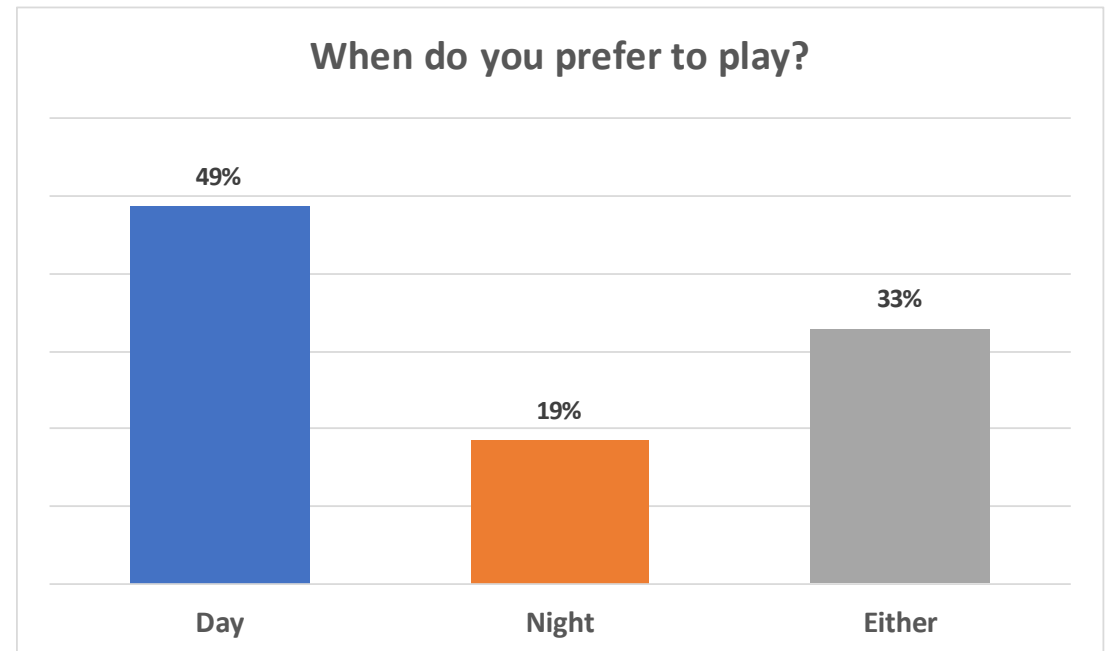
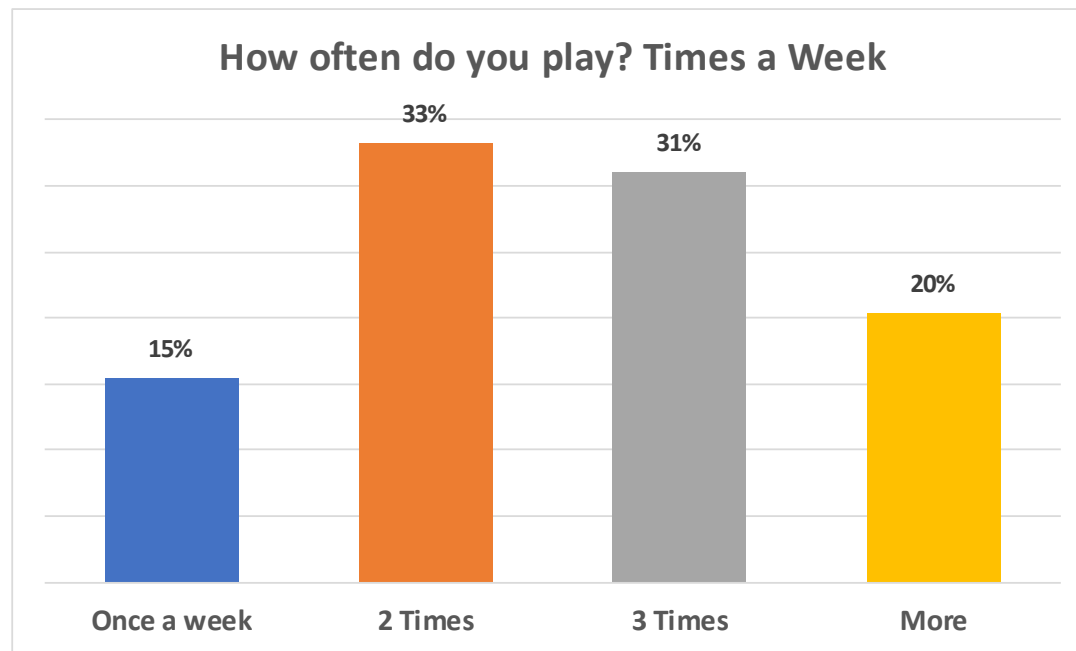




# Most congress players play several times a week including night but most players prefer day time bridge

50% of respondents play bridge 3 or more times a week. Since the 2011 research night time bridge has declined

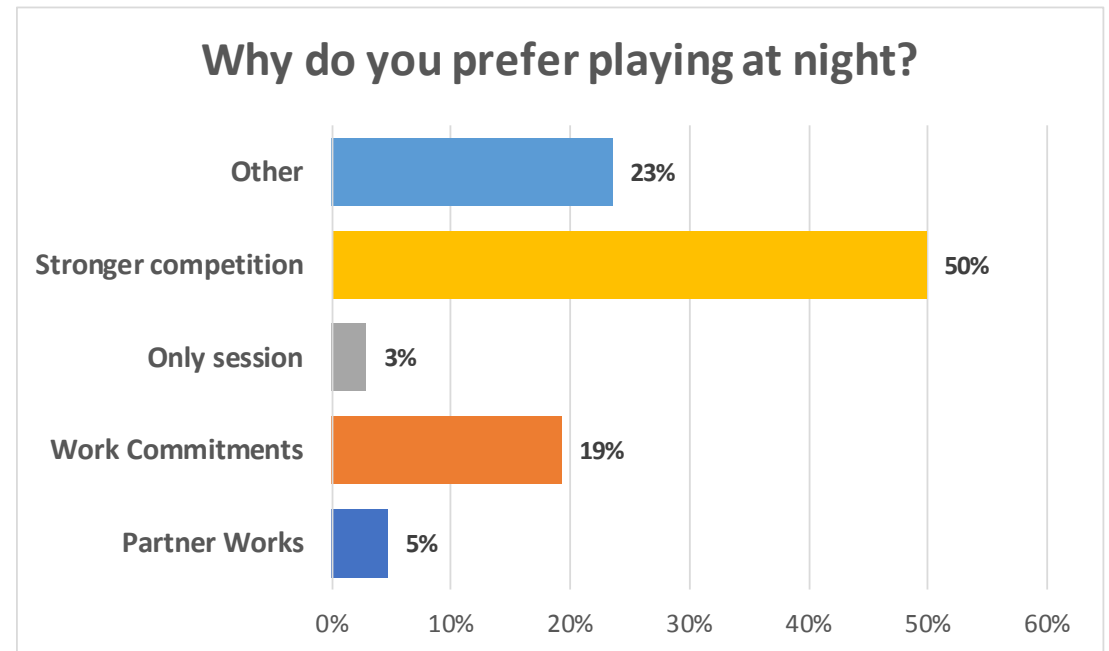
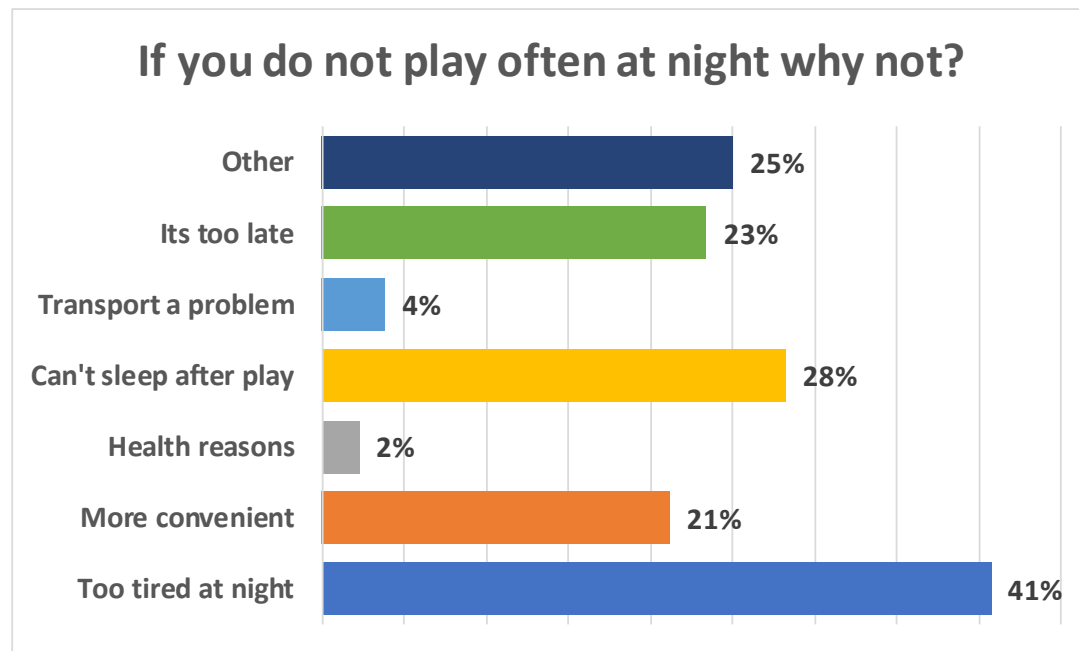
For highly competitive players the top weekly session is normally at night but half prefer play during the day



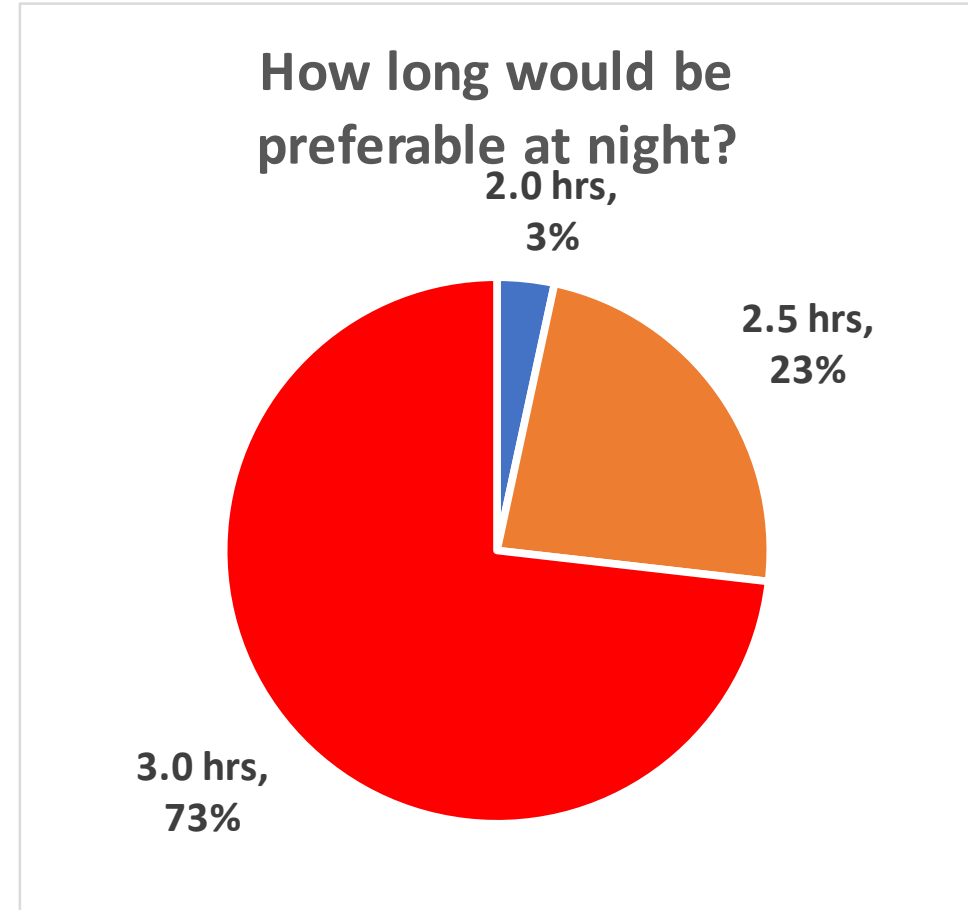
# Night time bridge is dying in the US and Australia with an aging player base

**Mature age players are too tired at night and can't sleep after play**

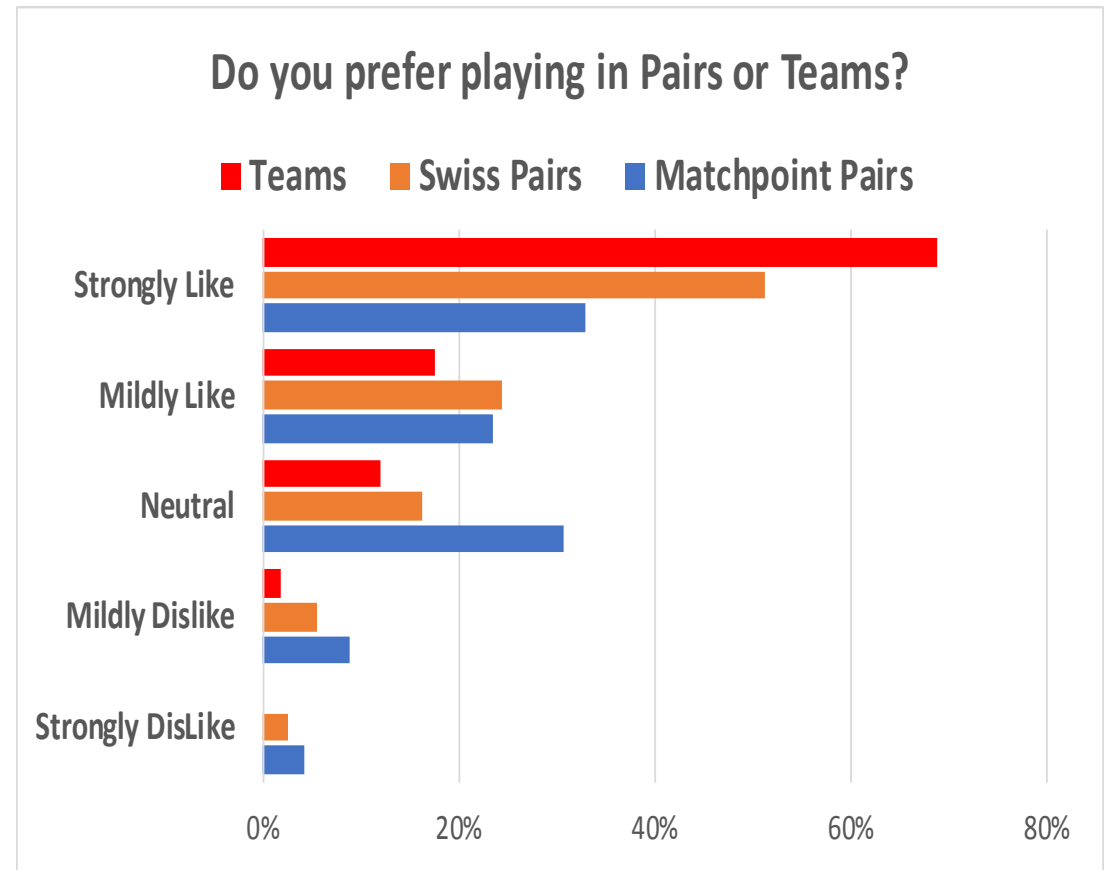
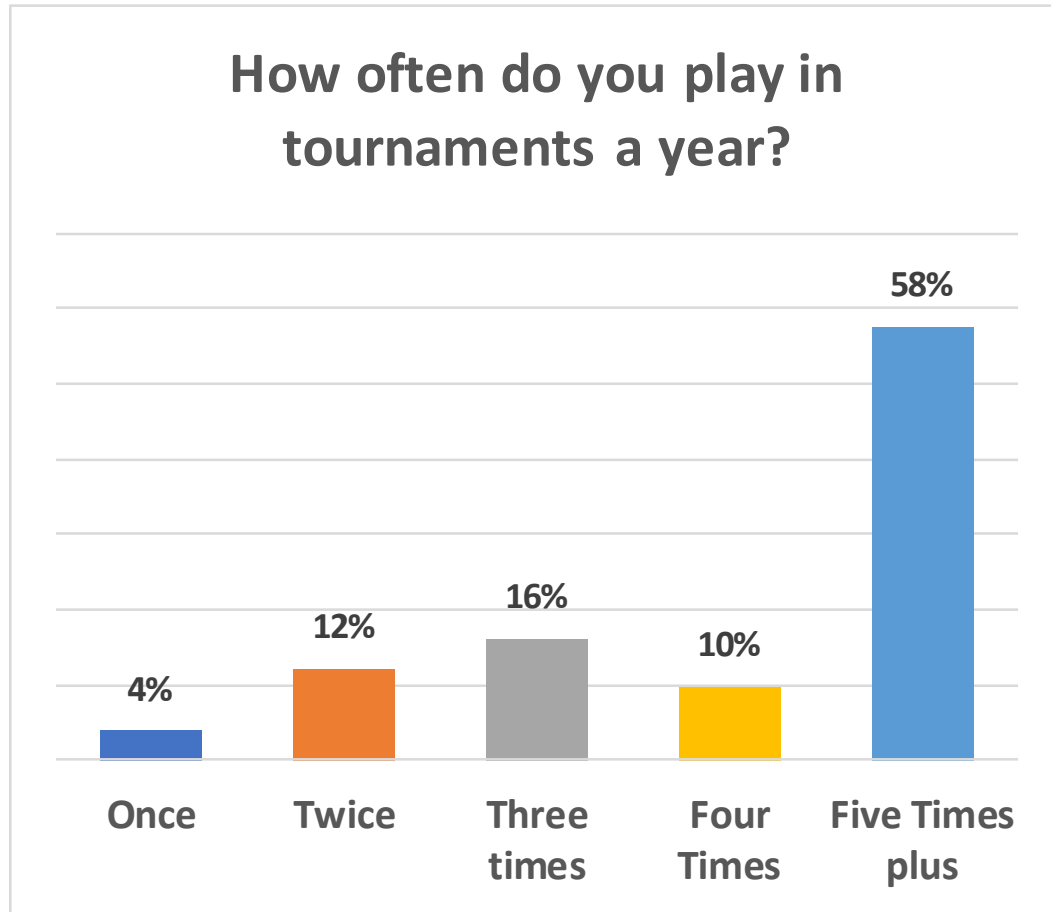
**Strong players like stronger competition**



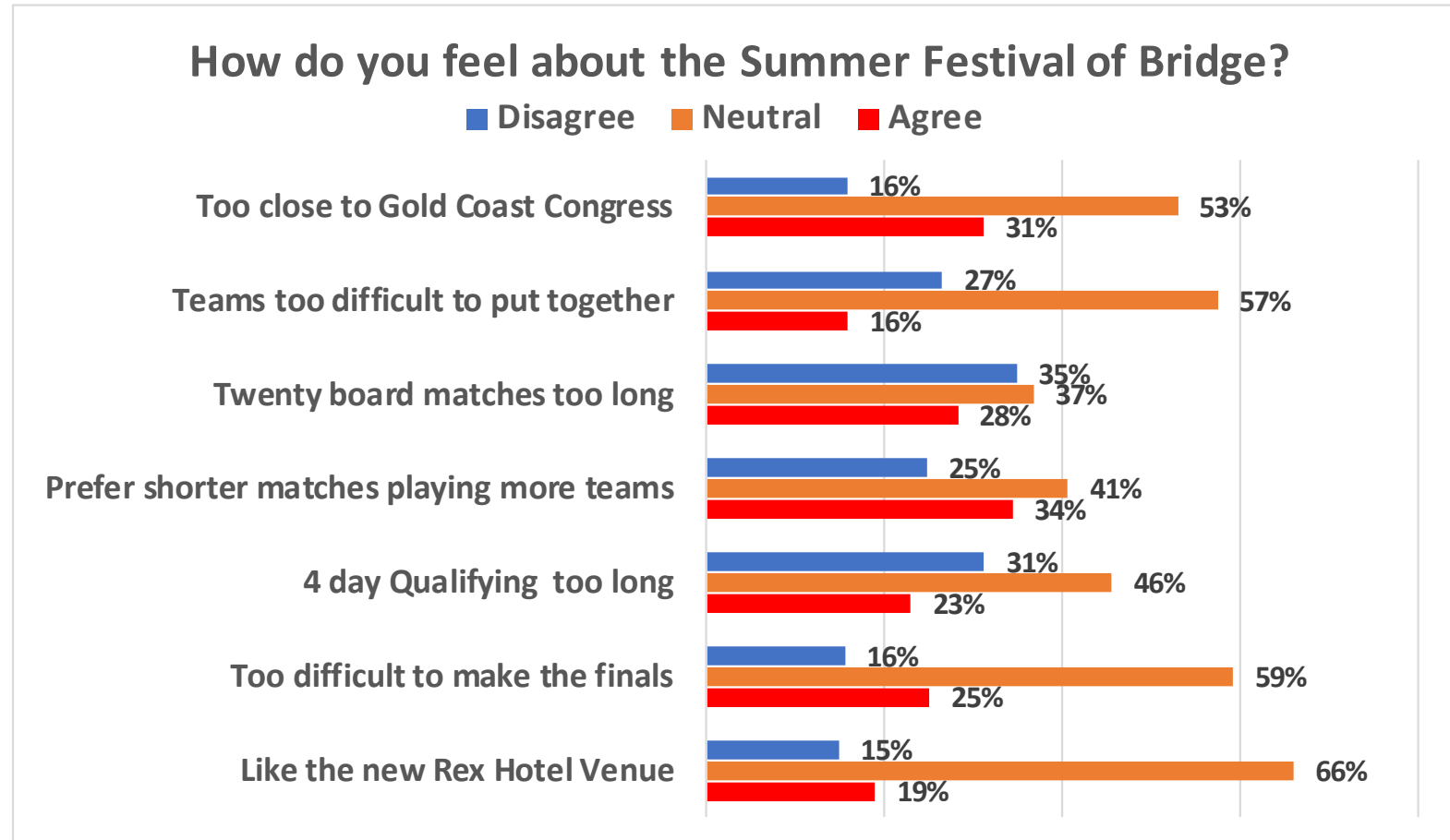
# The biggest group, including two of Australia's top players, prefer night time bridge to start at 7pm



# 58% of Players compete in congresses 5 times plus a year and prefer Teams from Swiss Pairs



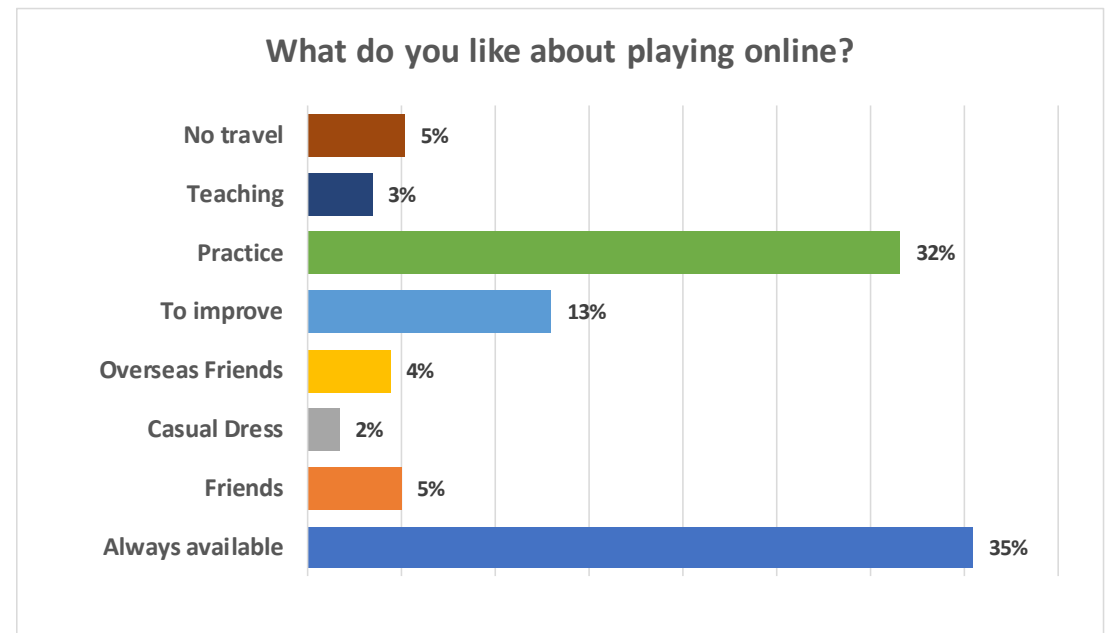
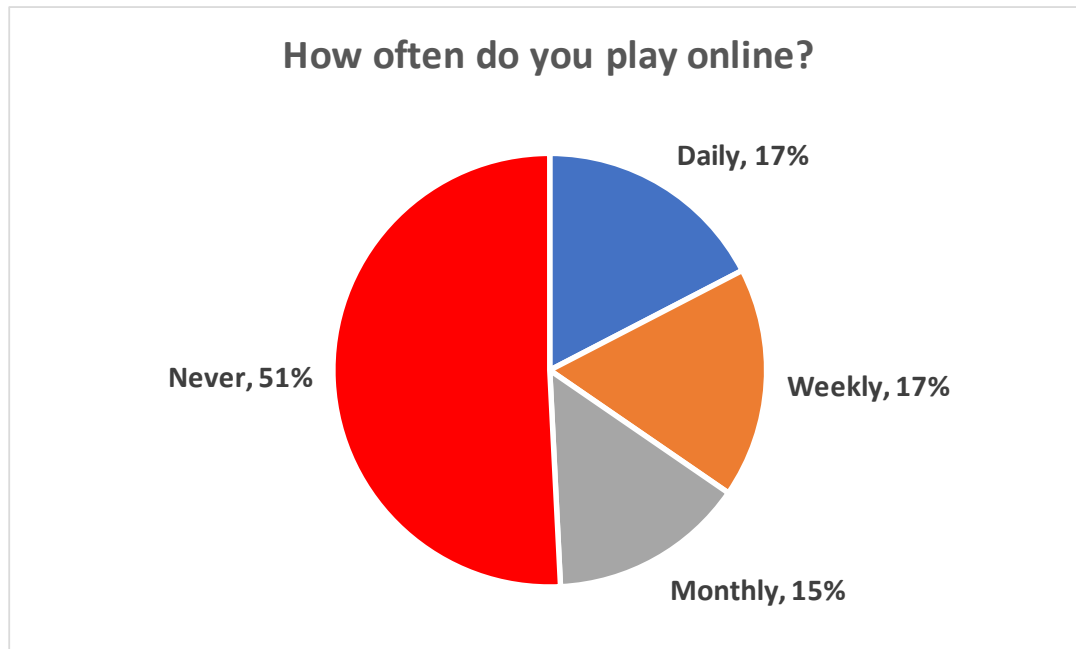
# Most respondents were neutral about aspects of the SFOB but some prefer shorter matches playing more teams



# Half like bridge being always available online for practicing online for 1-2 hours at a time

Since the 2011 Research online bridge playing has grown from 25% to 50% of respondents

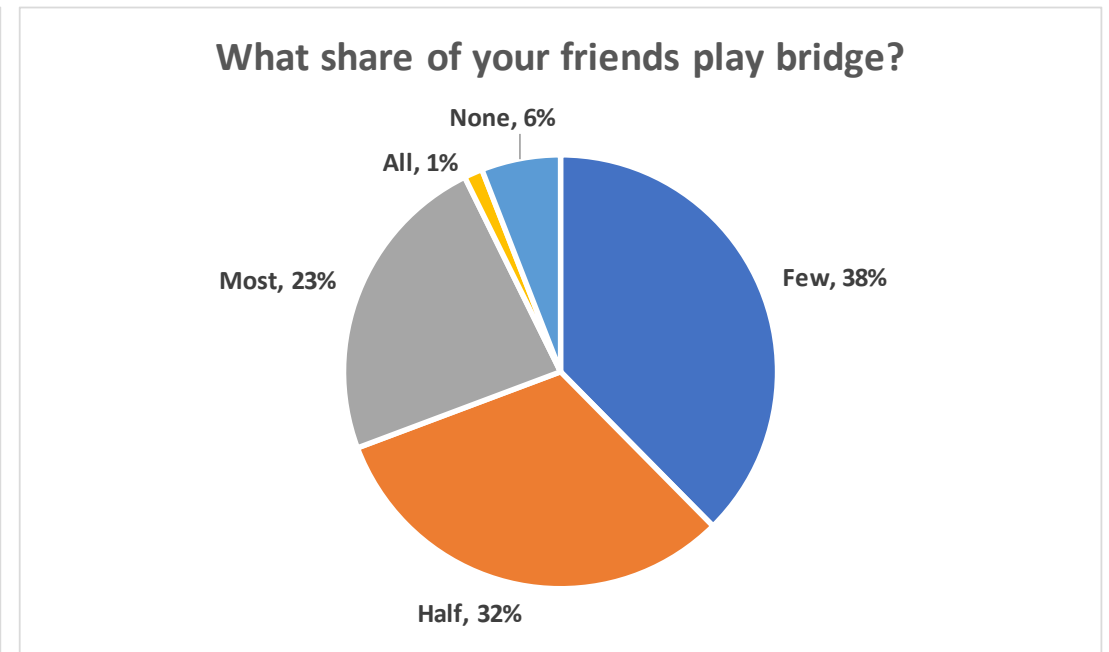
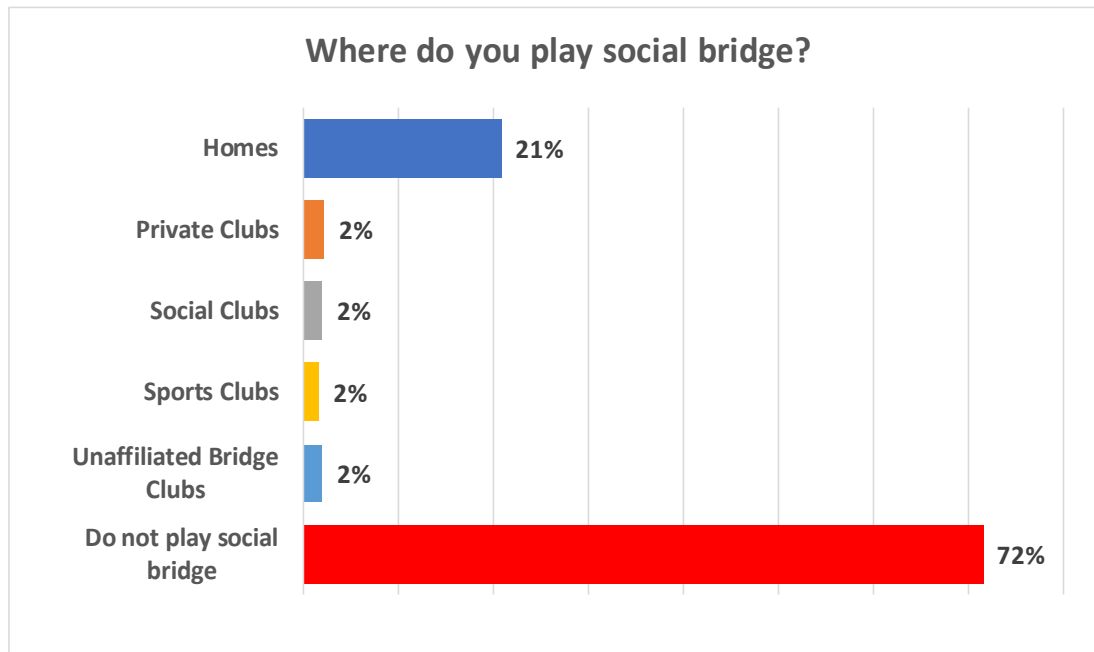
Availability and the ability to practice are by far the biggest likes for online bridge



# Most competitive bridge players do not play social bridge but bridge players make up most of their friends

**Over 70% do not play social bridge and those that do play mostly in homes**

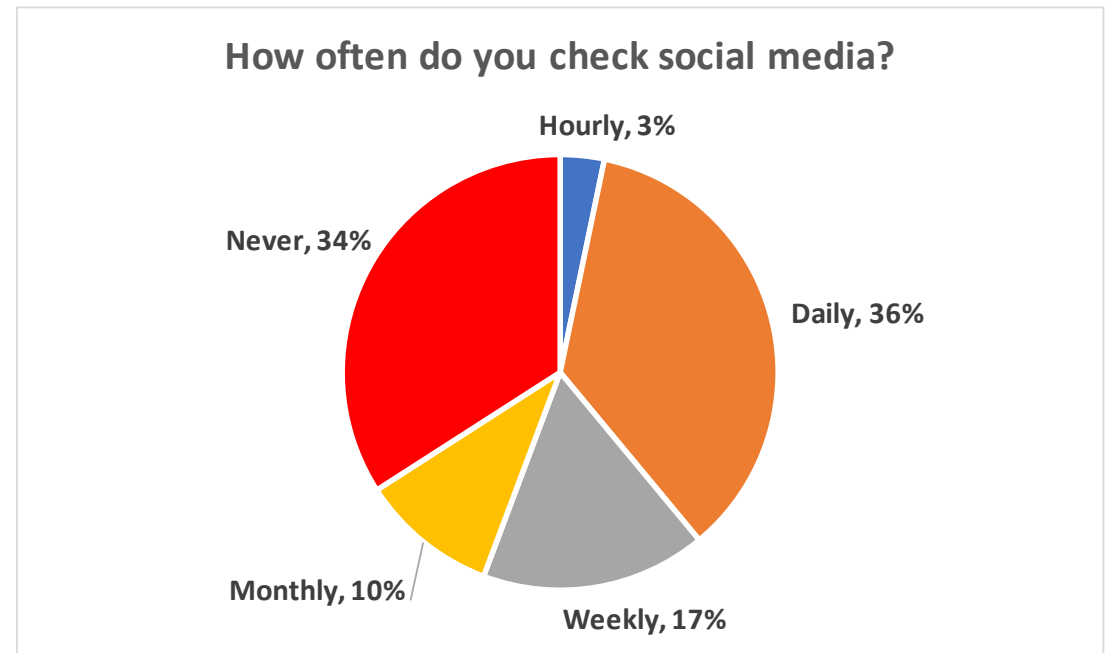
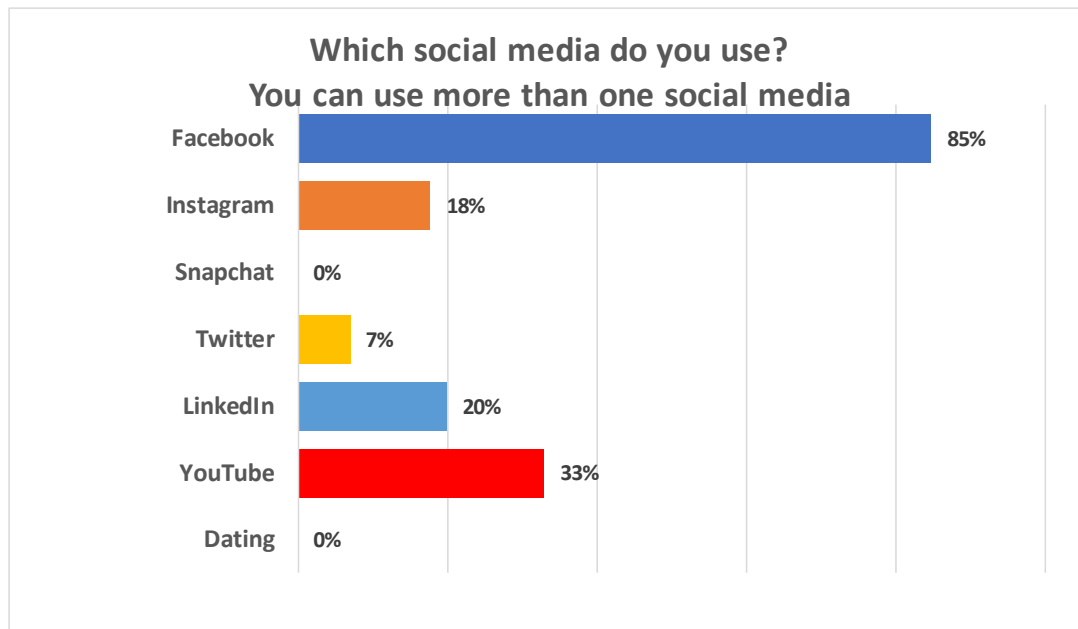
**Over half of bridge players friends play bridge**



# Of the two thirds of bridge players who use social media facebook is used by 85% and 40% check it hourly or daily

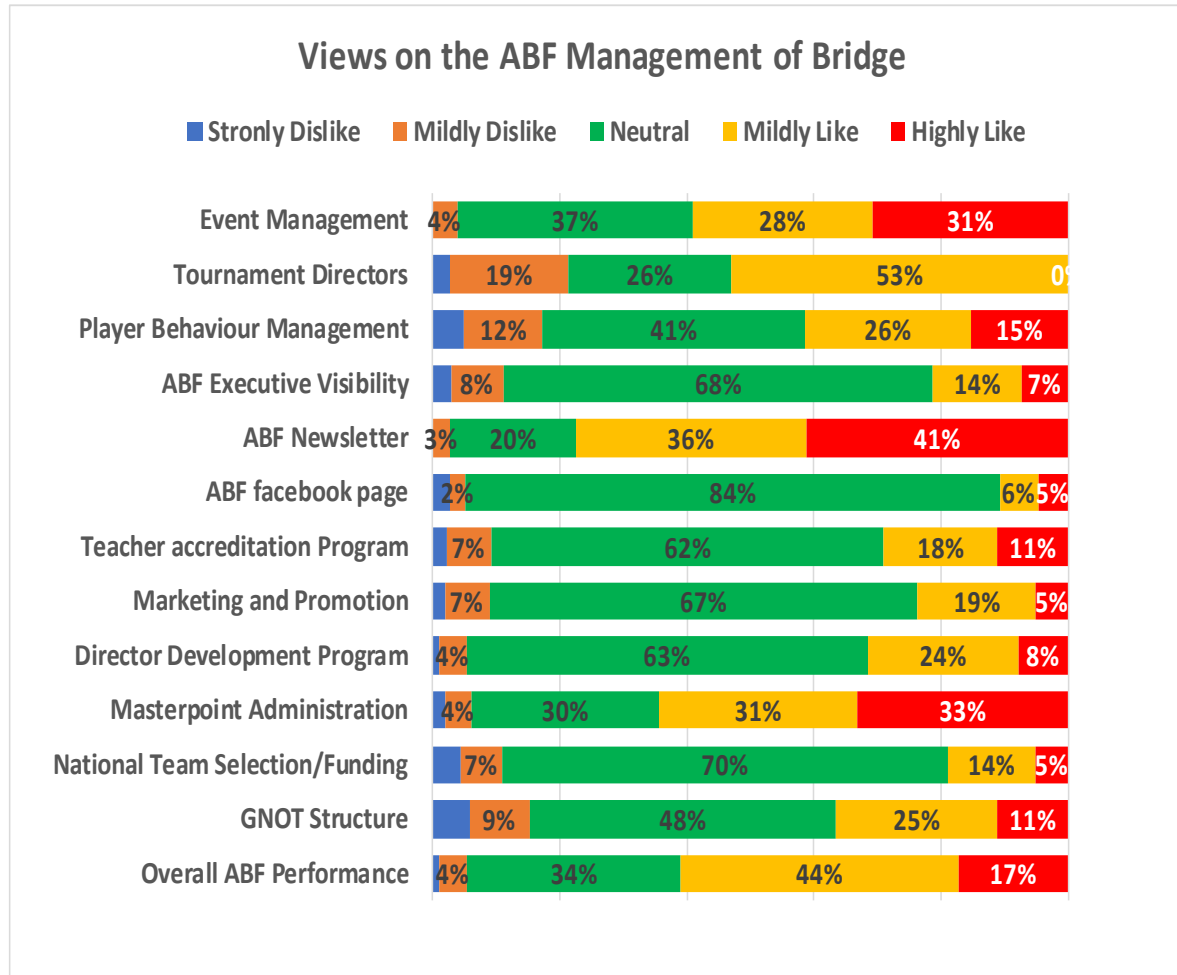
Facebook is by far the most used social media followed by YouTube – facebook usage has tripled since 2011 research

34% never use social media but more check it hourly or daily



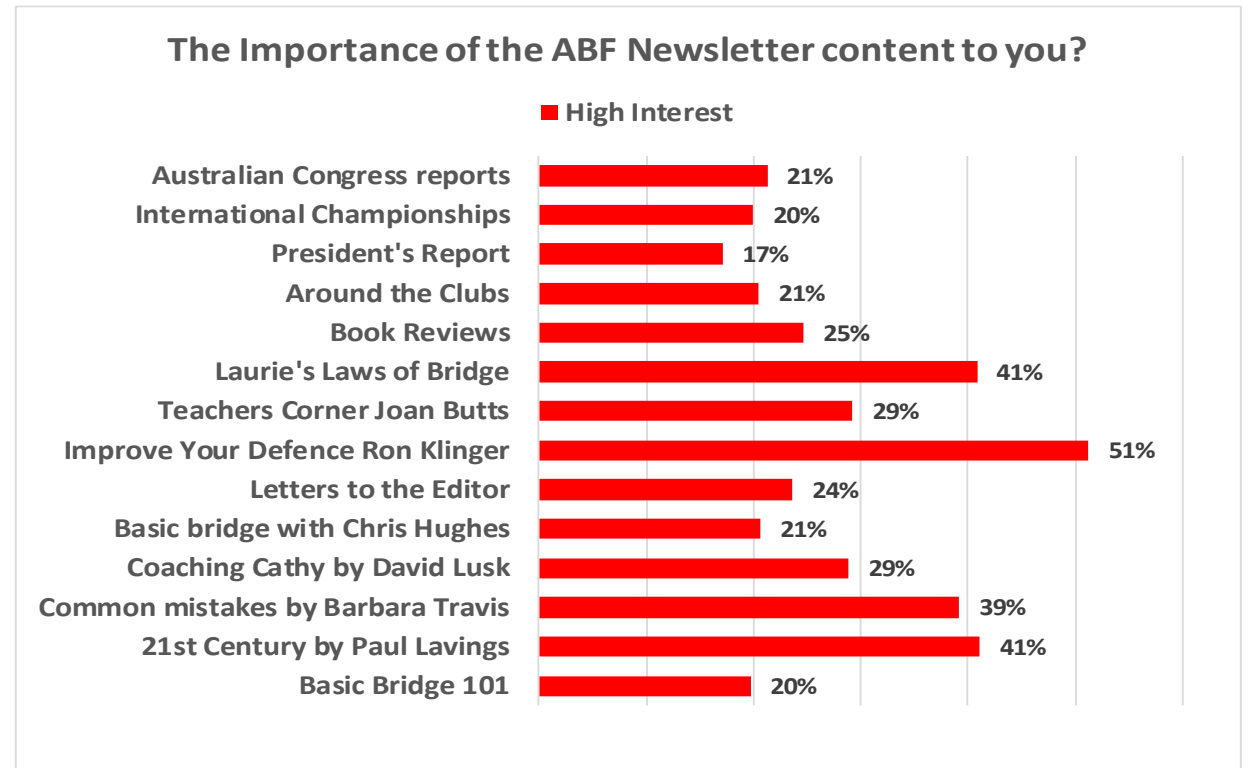
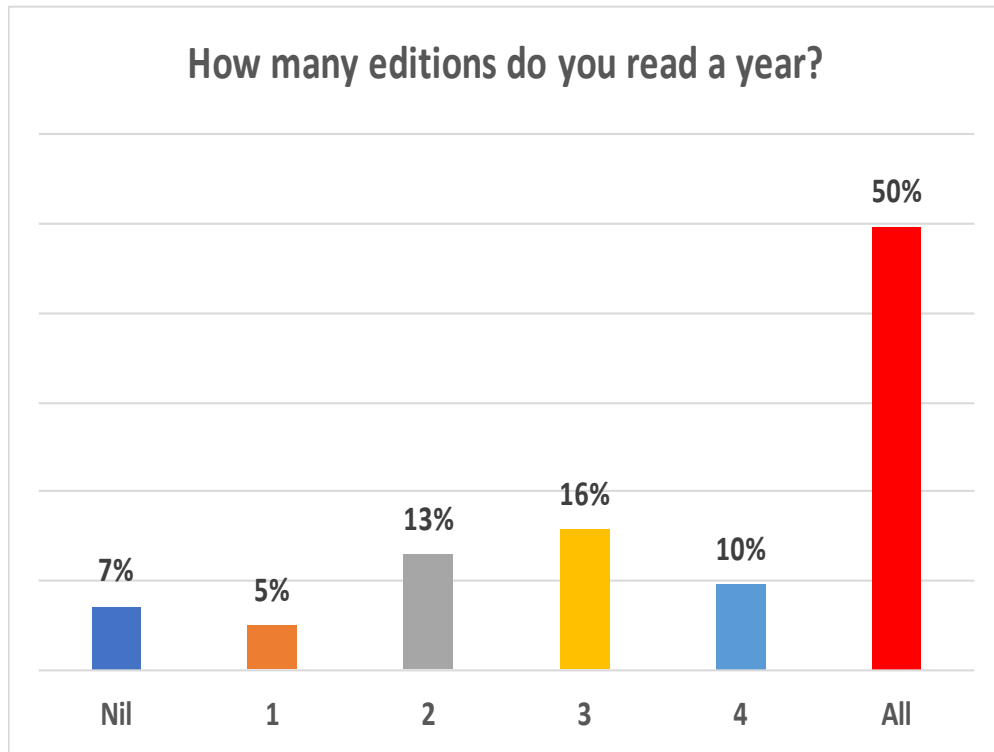


# Amongst high level congress players the ABF performance is 60% likes but further research needs to be done on beginners and improvers to test knowledge and interest in the ABF

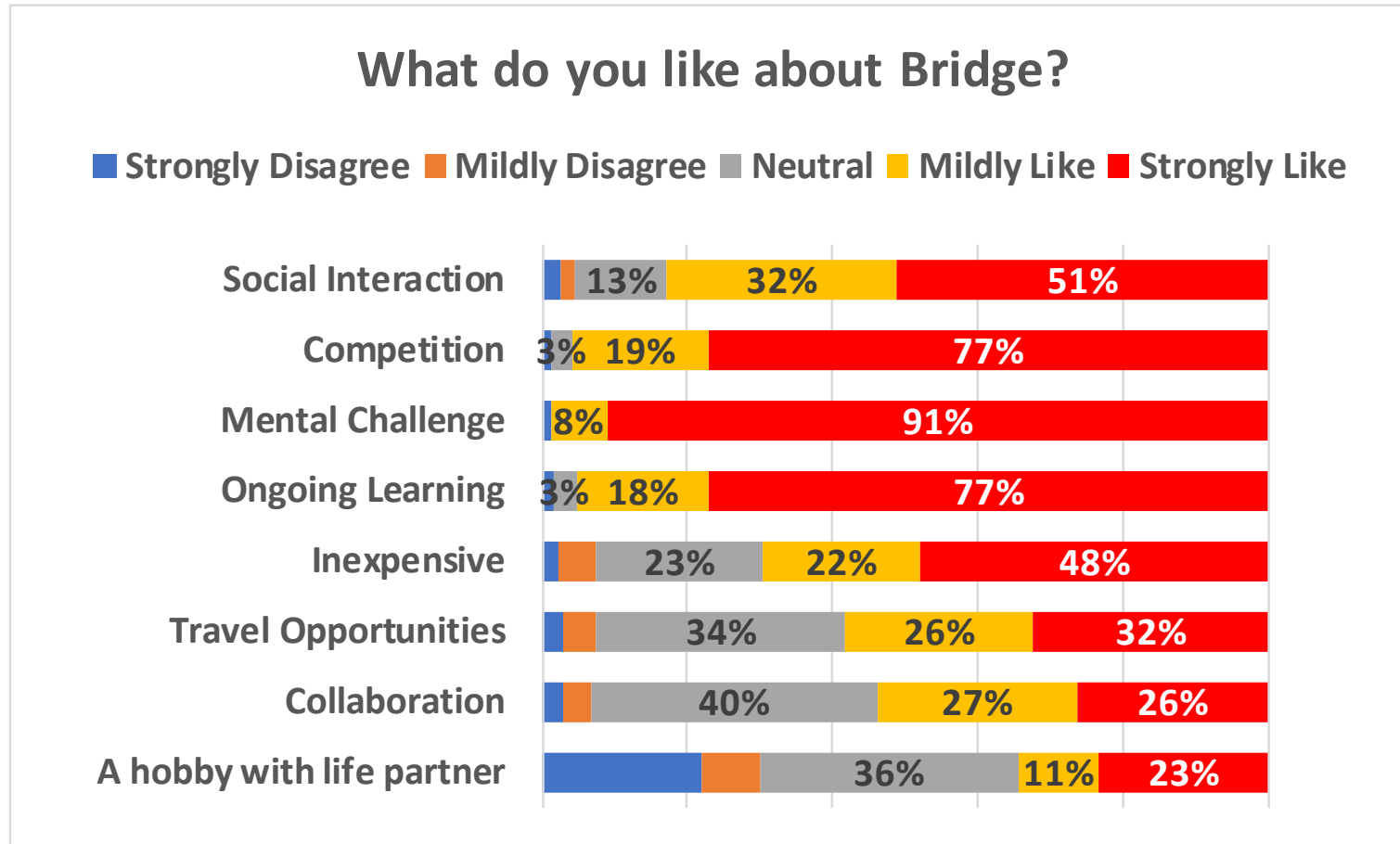


- The ABF Newsletter was the stand out performer of the ABF functions amongst experienced players with 77% “Mildly Likes” and “Highly Likes”
- Masterpoint Administration came in 2<sup>nd</sup> with 64% likes
- The other stand out performance was Event Management with 59% likes which was also highest in 2011 research
- Tournament Directors was an interesting outcome with 53% Mildly Likes but no Highly Likes and the highest Mildly Dislikes
- ABF facebook Page, National Team Selection , ABF Executive Visibility, Marketing, Director Development and Teacher Accreditation had the highest Neutral responses between 62% and 84%
- Player behaviour management is still a problem

# The ABF Newsletter is widely read by Congress players.

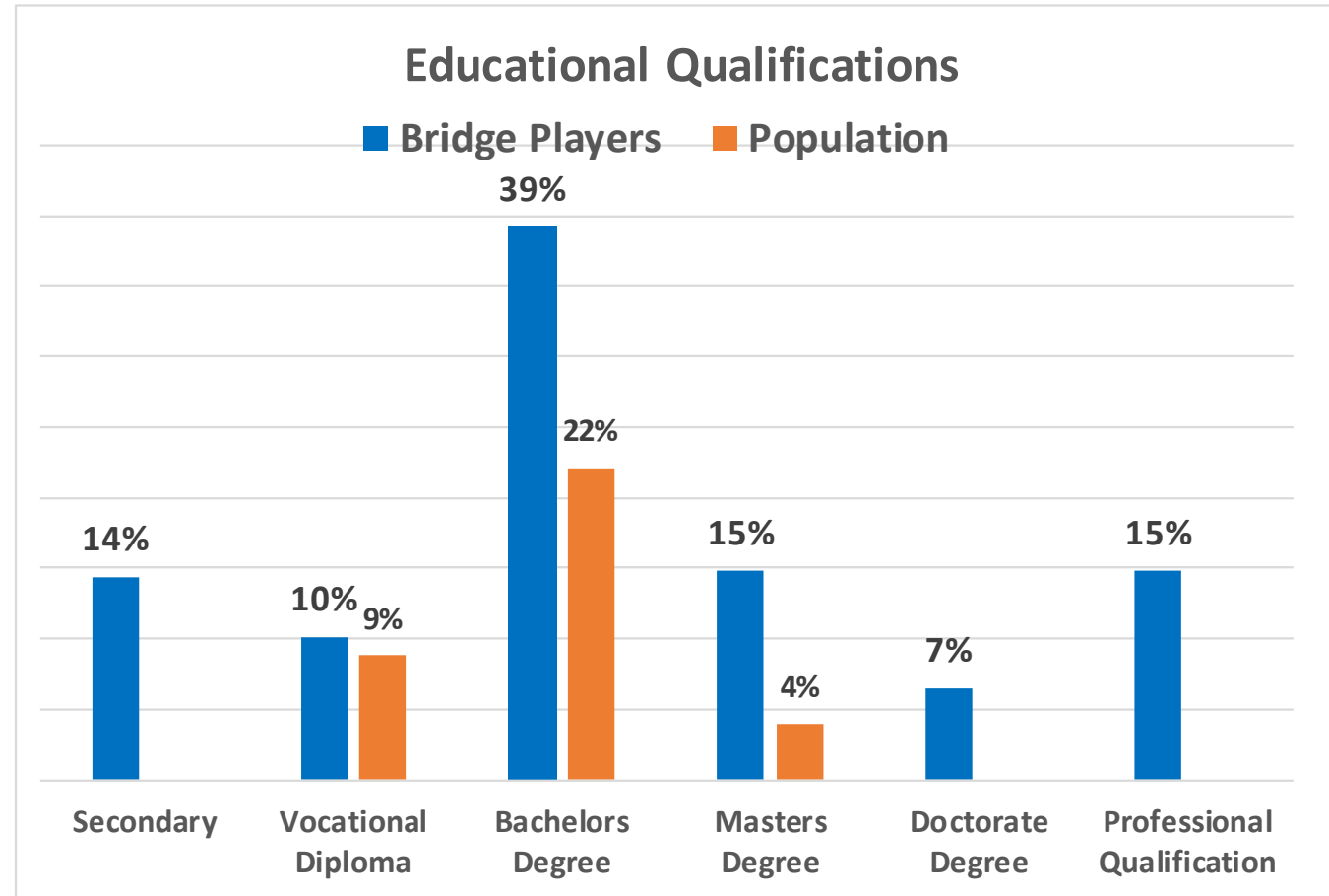


Bridge is loved by Congress players for the mental challenge, competition, ongoing learning and social interaction and is considered to be inexpensive

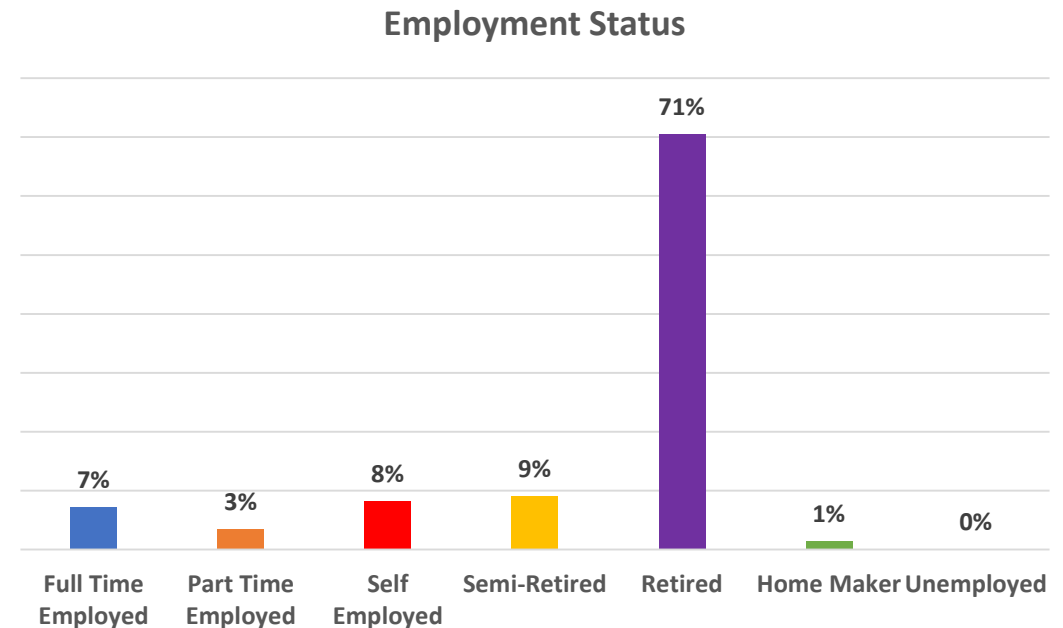
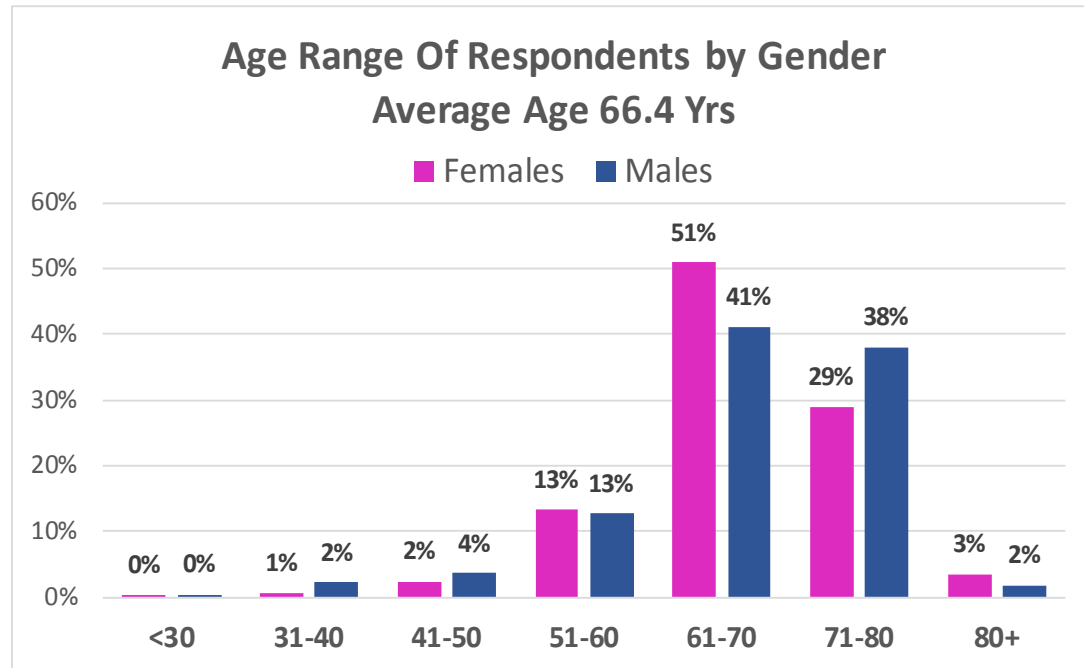


# Profiles of Congress Bridge Players

The respondent bridge players are highly educated with over 60% having University degrees and 22% earning Masters or Doctorates



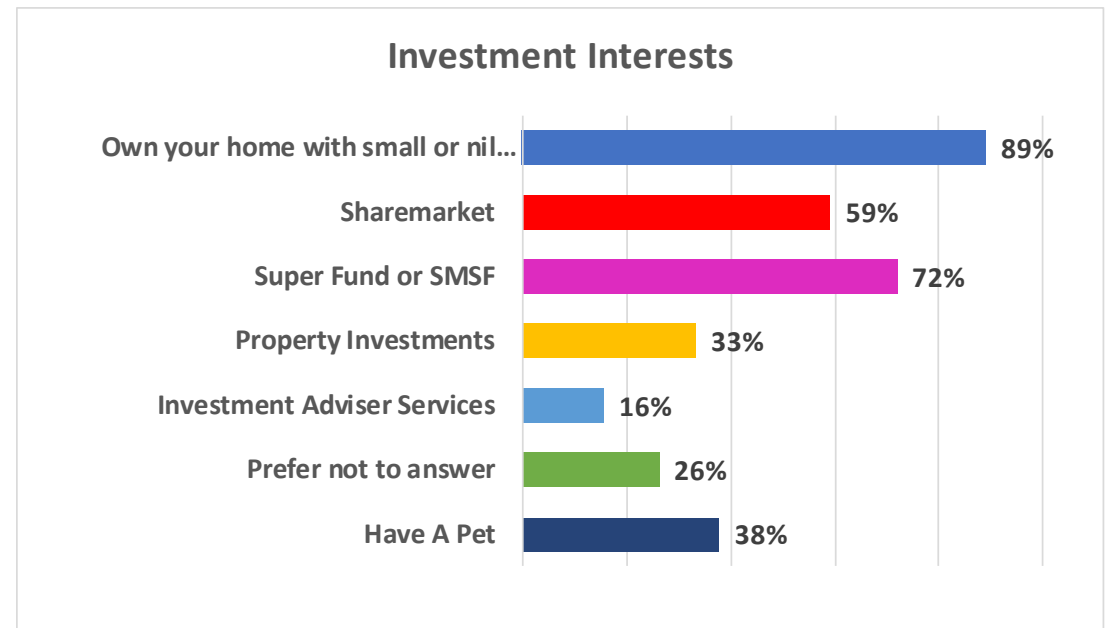
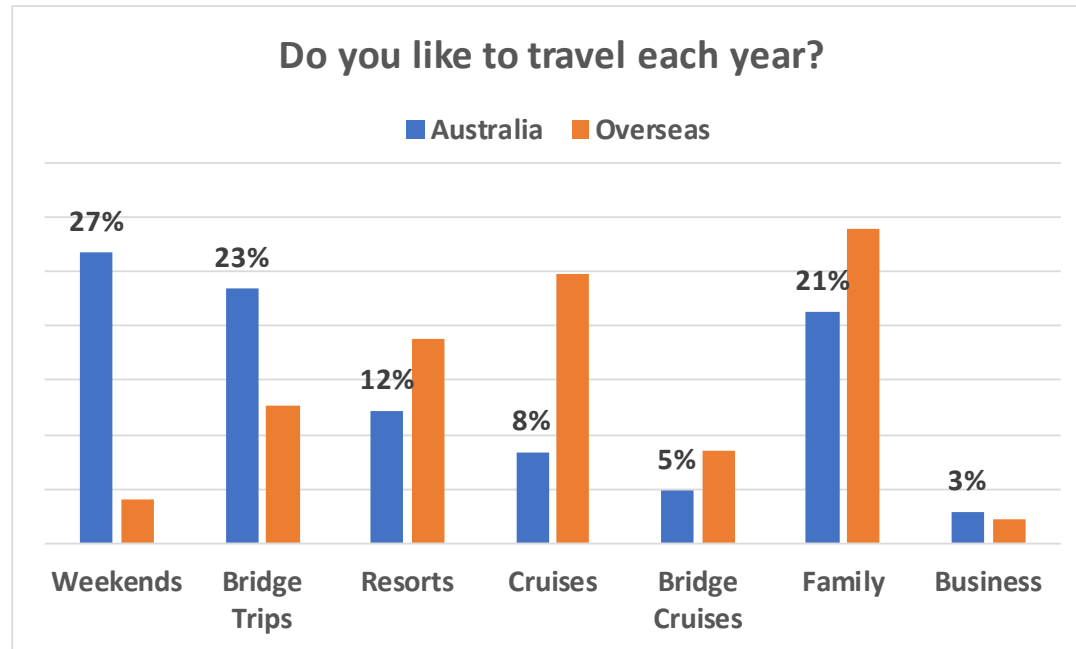
# 90% of congress bridge players are aged 50-80 and 80% are retired or semi-retired



# Congress players like to travel in Australia and Overseas

Travel frequently on bridge trips in Australia and family holidays overseas on cruises and resorts

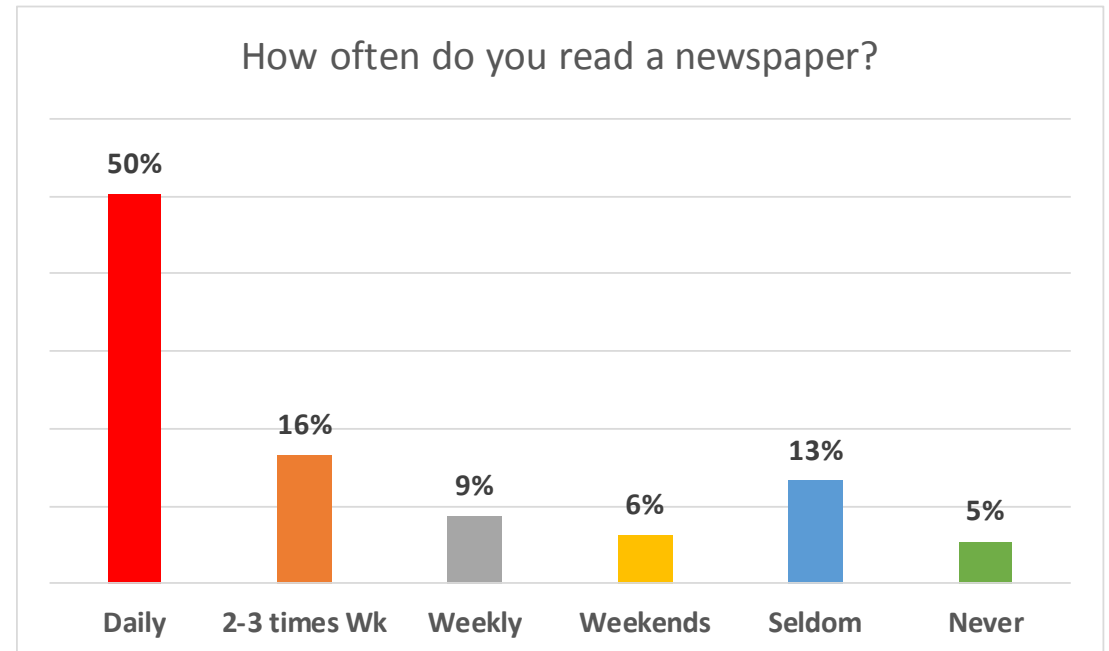
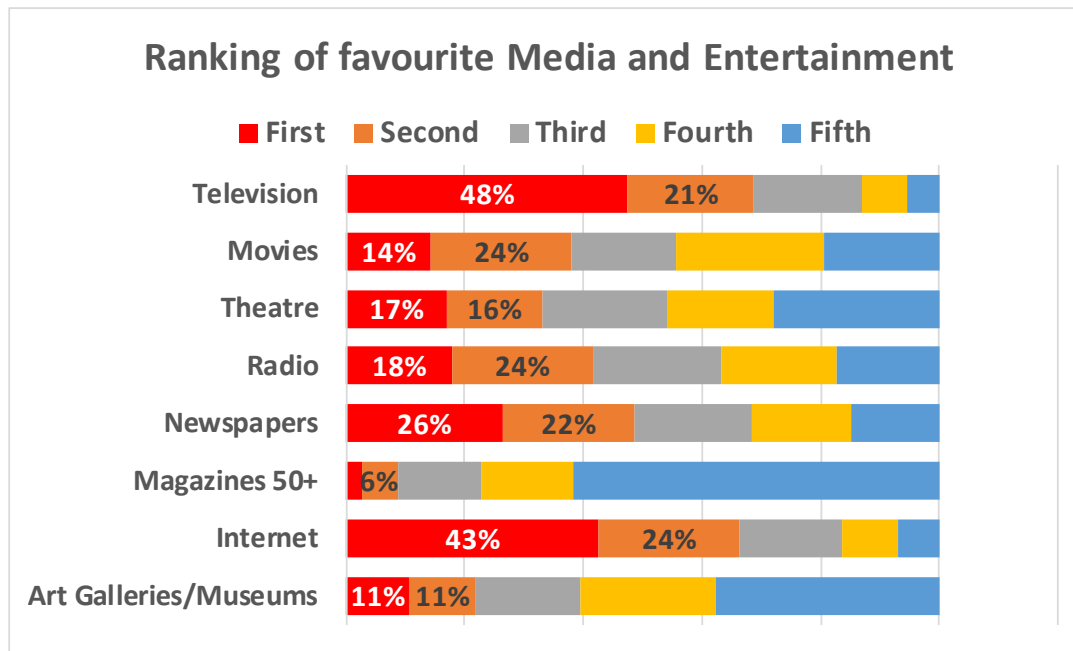
Bridge players have very high home ownership with low or no mortgage, have superfunds and invest in the share market and property



# Bridge players like television and the internet but also have very high newspaper readership

Close competition between TV and Internet for favourite media followed by newspapers and movies

Half of bridge players read a newspaper every day and a further 25% during the week- this is remarkably high

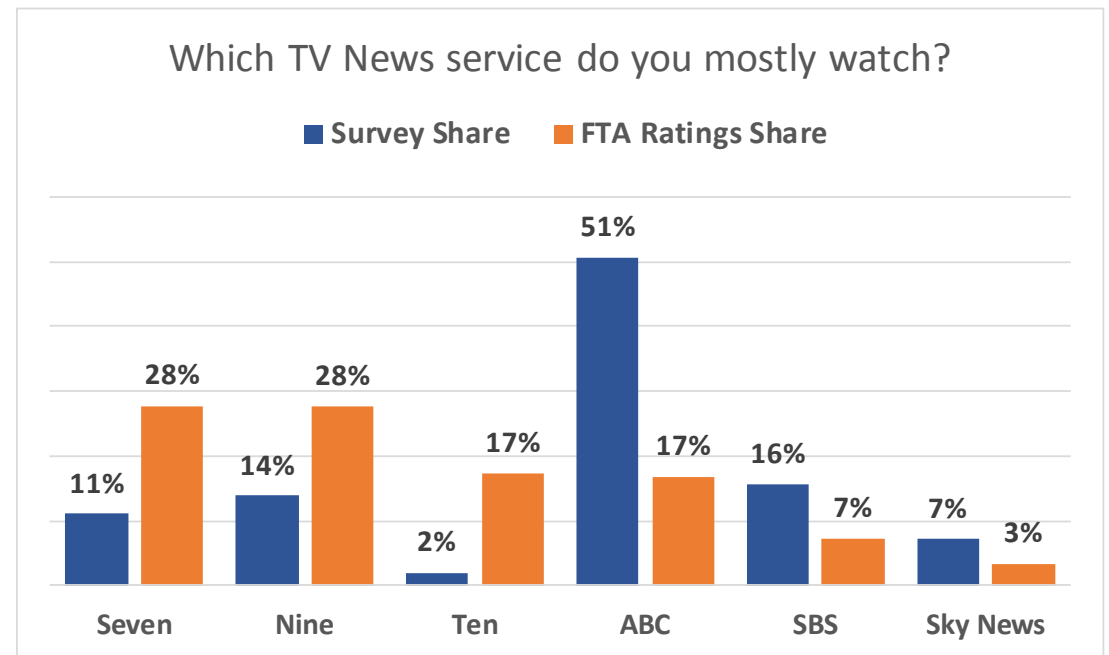
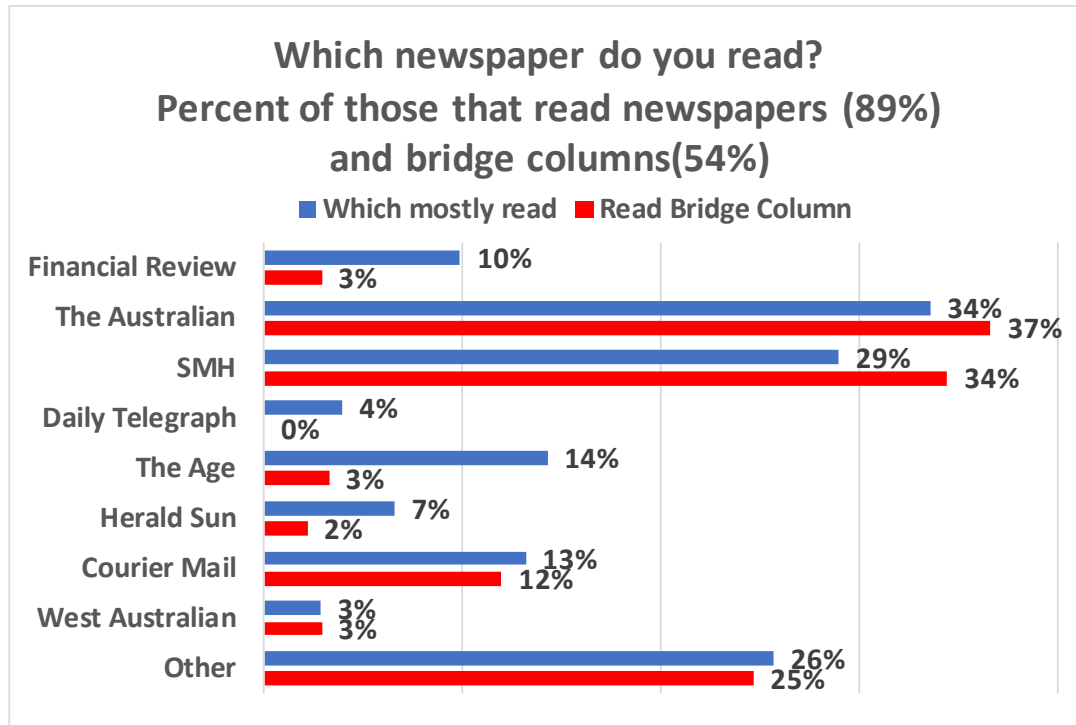




# Bridge players are avid readers of the quality newspapers including bridge columns where provided and ABC and SBS TV News

The Australian is the leading national newspaper read followed by Fairfax city newspapers

The ABC and SBS News are the most popular with bridge players followed by Nine then Seven



# Suggestions and Comments from respondents

- Despite the length of the survey over 56% people chose to add comments which demonstrates their interest and passion for bridge
- The respondents were given two opportunities during the survey
  - Do you have any suggestions on how bridge could be made better and attract new players to grow our great sport?
  - Anything else you would like to add?
- There were 183 comments to the first question and a further 105 to the second for a total of 288 comments
- They are wide and varied and difficult to classify and I do not like to make a personal selection with its inherent bias
- The responses will be provided to those who might like to read them but they run for 12 pages
- Finally, I would appreciate a recommendation of the best comment so that we can reward them with the \$100 prize offered