

The Future of Bridge

The Need For Change

for the Australian Bridge Federation

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Background - Peter J. Cox BEc MBA

Peter is an expert in market research, financial analysis, assessing global industry trends, providing insights and developing corporate and marketing strategies.

Over the last 35 years Peter has provided consulting to local and overseas investment bankers, governments, corporations and investors in the Australian media, leisure and communications industry. Clients have included:

Arthur Andersen, Australian Association of National Advertisers (AANA), Australian Jockey Club, Australis Media, Australian Tax Office, Bank West, DEET, DOTAC, EDS (US), Foxtel, General Instrument (US), Hills Industries, Hoyts, International Media Management, Macquarie Bank Limited, Mitsui & Co (Japan), Pacific Broadband (Hong Kong), Premium Movie Partnership (Showtime), Queensland Turf Club, The Seven Network, Sony Pictures Television, Trans Media Productions, UCOM, Senate Select Committee on Subscription Television Broadcasting Services, TV NZ, Warner Brothers Television.

Peter has an extensive knowledge of the media and leisure industry trends not only in Australia but internationally and has been invited to be chairman and speaker at over 70 industry conferences in Australia, New Zealand and Asia.

He has written numerous papers for clients and feature newspaper articles including for the Australian Financial Review and The Australian. Also, Peter has been interviewed on hundreds of occasions for television and radio interviews and in all major Australian newspapers and business magazines.

A well prepared ABF Marketing Plan 2014-2017 but did it achieve its Goals?



ABF MARKETING PLAN

2014-17



The diagram illustrates the components of a marketing plan. At the center is a red oval labeled 'MARKETING'. Five arrows point towards this central oval from boxes labeled 'ADVERTISING', 'BRANDING', 'RESEARCH', 'PRODUCT', and 'INTERNET'. A sixth arrow points from a box labeled 'STRATEGY' to the 'MARKETING' oval. The entire diagram is drawn on a white background with a hand-drawn style.

Goals for ABF Marketing in 2014-17 Plan

1. Achieve affiliated club membership growth of 4% per year from 2014
2. Each region sign up 2 non-affiliated clubs each year
3. 3 Clubs opened in targeted communities from 2015
4. 5% increase in attendances each year from 2015
5. 10% increase in attendances at ABF events by 2017

Were these goals achieved?

If not why were they not achieved?

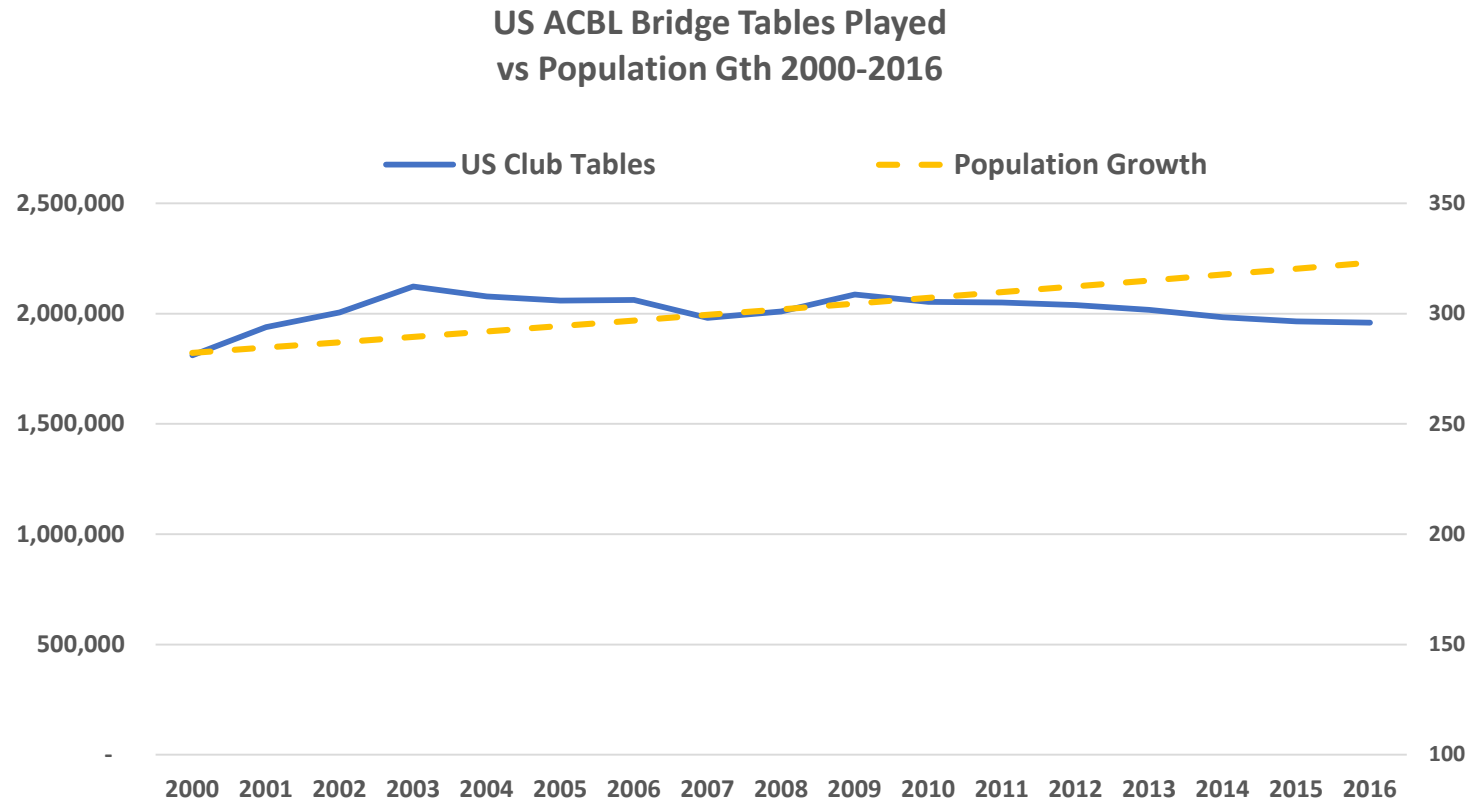
- Were they realistic goals?
- Were they adequately funded?
- Were they supported by ABF management, State bodies, Clubs or Members?

These questions need to be answered before preparing the Marketing Plan for 2018-20

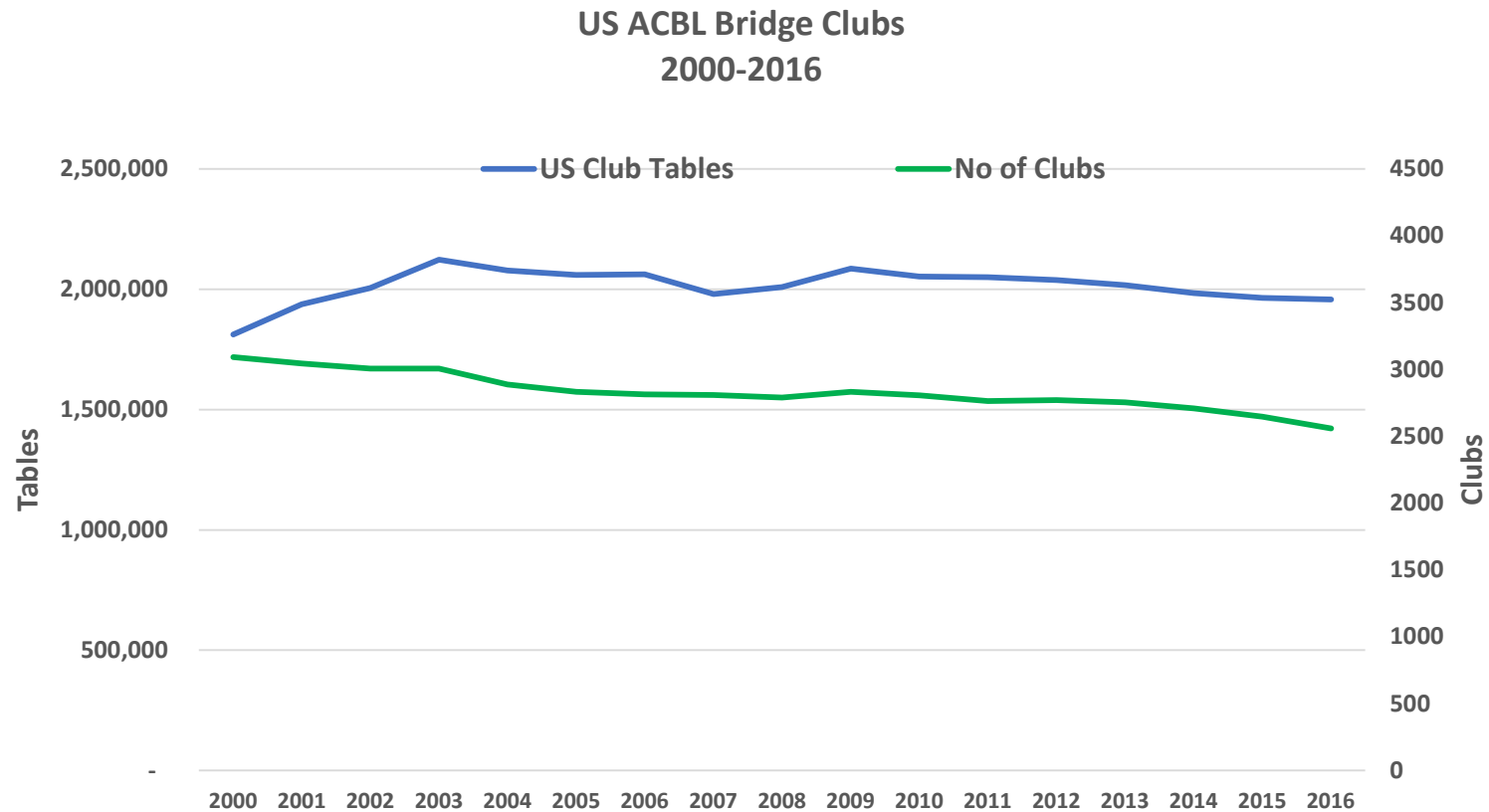
ABF Membership static for the period 2014-17 though period not finished yet

	ABF Club Membership - Dec								2010/17		2014/17	
	2010	2011	2012	2013	2014	2015	2016	2017 Nov	No	% Chg	No	% Chg
ACT	802	823	902	910	933	961	966	996	194	24%	63	7%
NSW	13,838	13,699	14,022	14,524	14,775	14,833	14,619	14,477	639	5%	-298	-2%
VIC	5,161	5,078	5,237	5,599	5,516	5,521	5,676	5,675	514	10%	159	3%
QLD	7,277	7,486	7,645	7,892	8,031	8,000	7,934	7,791	514	7%	-240	-3%
SA	1,584	1,657	1,693	1,864	1,959	2,068	2,116	2,121	537	34%	162	8%
WA	4,158	4,233	4,272	4,351	4,389	4,351	4,396	4,311	153	4%	-78	-2%
TAS	758	788	809	825	865	875	870	861	103	14%	-4	0%
NT	171	177	185	189	182	166	149	148	-23	-13%	-34	-19%
Total	33,749	33,941	34,765	36,154	36,650	36,775	36,726	36,380	2,631	8%	-270	-1%

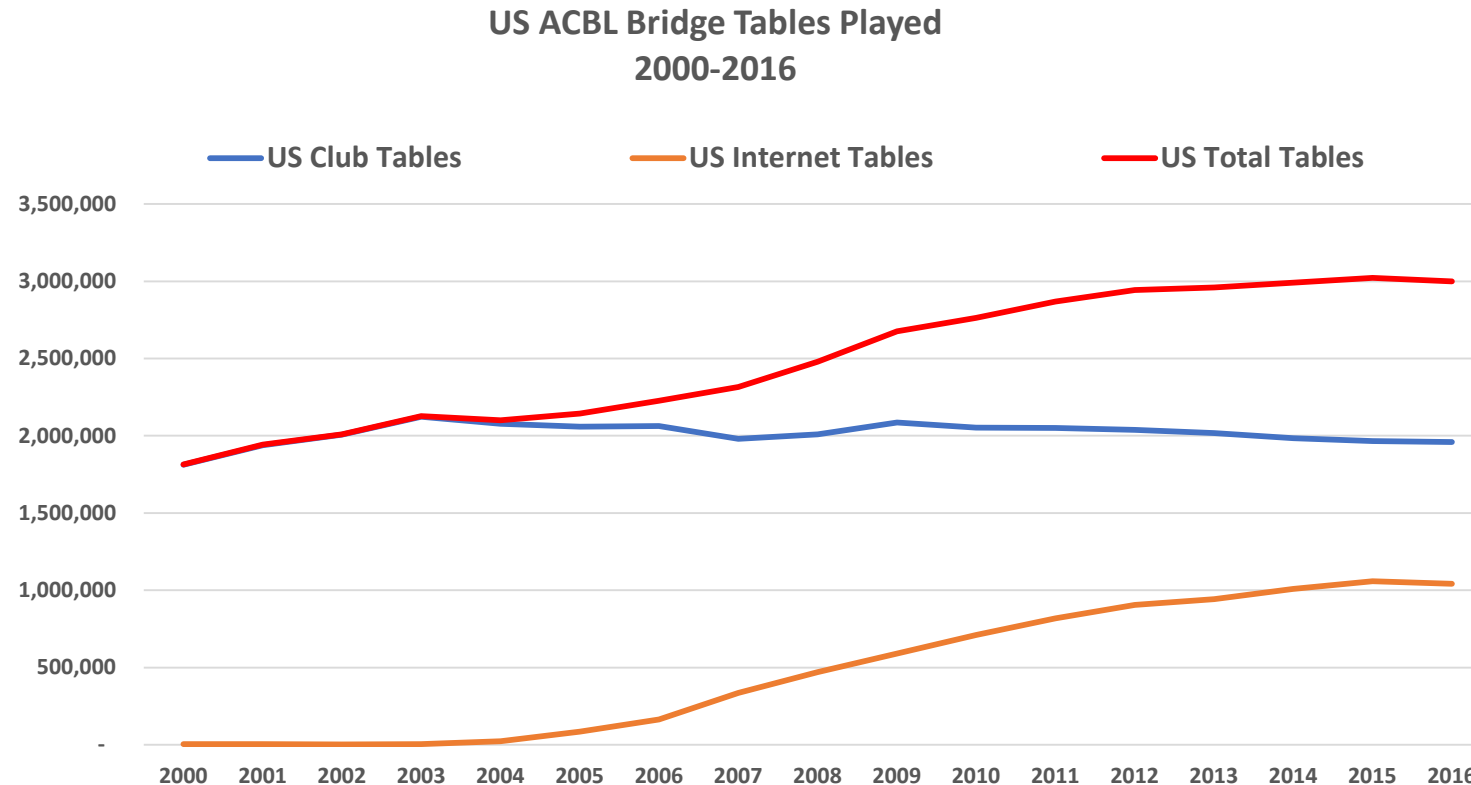
US Club Tables played have fallen since 2009 despite growth in population



Number of US Bridge Clubs have fallen by 17% since 2010



Growth in Internet Tables played may have contributed to fall in Club Tables played



The US Experience

- The ACBL
 - Membership 167,000 Tables Down 8% from 2003
 - Clubs 2560 Down 17% 2000-16
 - Tournaments Increase in Tournaments Ave Tables Down
 - Annual Budget \$16 million plus
 - Headquarters Staff 59 plus Directors 170
 - Player ave Age 2001 – 65.6 2016 – 70
 - Life Expectancy 78
- US Survey in 2005
 - 25 million Players with Median Age 51
 - 19 million current players
 - 5.1 million played every 2-3 weeks
 - 3.3 million played at least once a week
 - 4.1 million played Online – 35.8% at least once a week
- ACBL Online Tables gone from 84,000 in 2005 to 1 million in 2016

Australia
 36,000
 349 No Growth
 Canberra Teams Down Prs Up
 \$1.4 million
 ?
 60-70?
 82

? ? ?

Top 5 clubs in Australia and the US play a similar number of tables a year

Comparison of Annual Tables played in Top 5 Clubs in Aust and the US

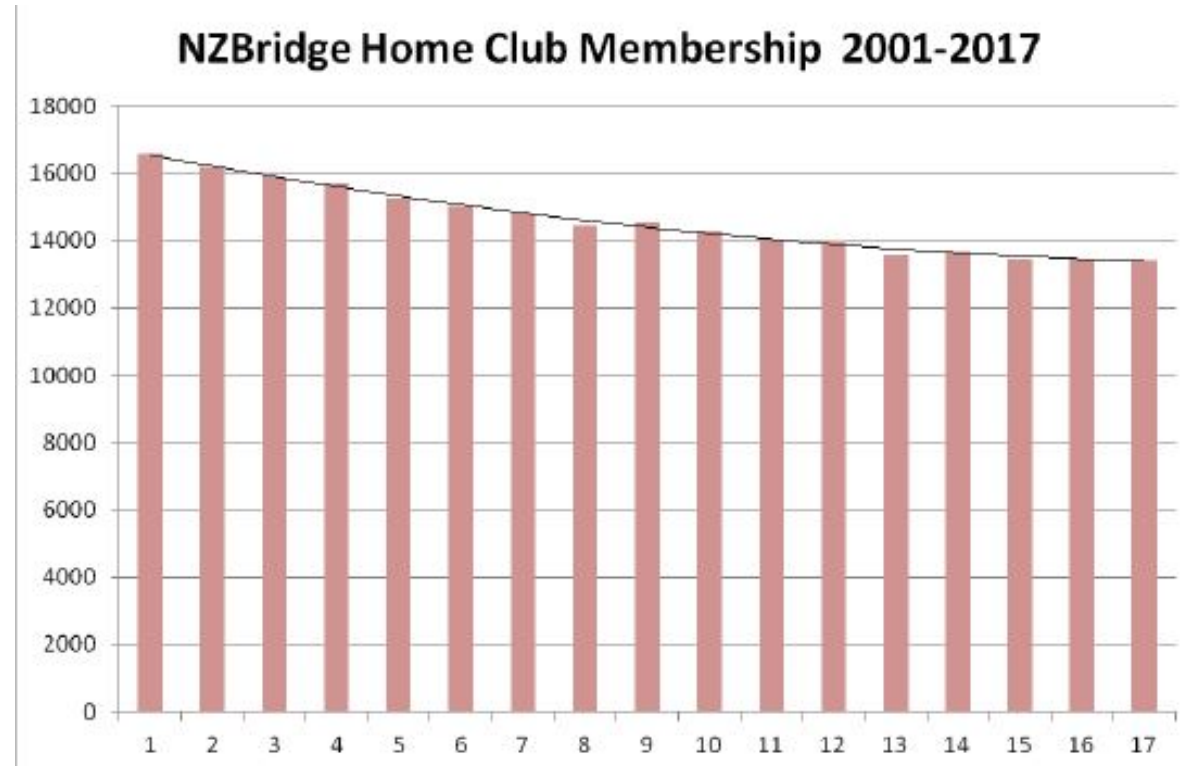
Australian Clubs	Members Tables/Yr		US Clubs	Location	Tables/Yr Act 2016
	No.	Estimate			
1 North Shore + Lindfield	1,503	21,500	Honors	New York	20,051
2 South Australian Bridge Assoc.	1,145	14,000	Jourdans Bridge Club	Delray Beach	13,826
3 West Australian Bridge Club	964	14,500	Laguna Woods DBC	Laguna Woods	13,030
4 Waverley Bridge Club Inc	826	10,000	The Villages DBC	Lady Lake	12,888
5 Sydney Bridge Centre	767	8,000	G & G In-Between DBC	Sarasota	12,151
Total Aust Clubs - 349			Total US Clubs - 2,560		

New Zealand and Australia have higher ratio of affiliated bridge players to population than the US and the UK

International Comparison 2016/17

	US	UK	Aust	NZ
Clubs	2560	630	349	108
Population	320,000,000	65,640,000	24,220,000	4,700,000
Members	167,000	55,000	35,705	15,060
Shr Pop	0.05%	0.08%	0.15%	0.32%

NZBridge Membership has fallen since 2000 but flattened in recent years



Bridge faces competition from other sports, leisure and entertainment activities

Australians are moving away from traditional competitive sports

Number of Regular Participants
Source: Roy Morgan Research

	Number 2016	Decrease 2000-2016
Golf	621,000	-24%
Tennis	463,000	-35%
Cricket	377,000	-10%
Netball	315,000	-24%
Australian Rules	253,000	-1%
Lawn Bowls	233,000	-25%
Rugby League	127,000	-27%
Rugby Union	59,000	-63%
	Number 2016	Increase 2000-2016
Soccer	623,000	46%
Basketball	438,000	4%
Martial Arts	321,000	14%
Athletics	170,000	9%
Badminton	141,000	37%
Rowing	118,000	62%
Triathlons	67,000	29%

To individualised sports; walking, aerobics, cycling, bush-walking, dancing and yoga

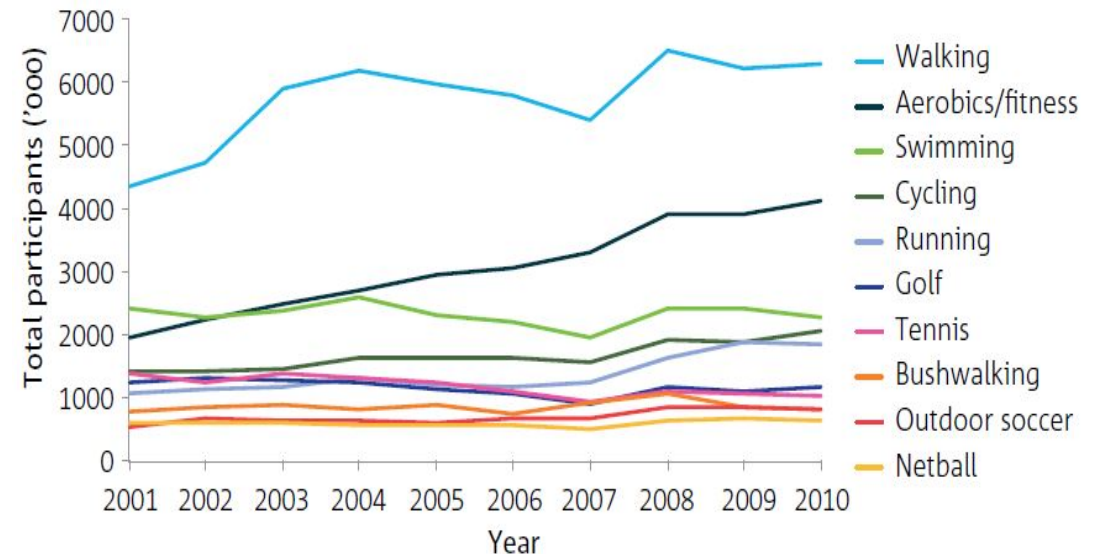


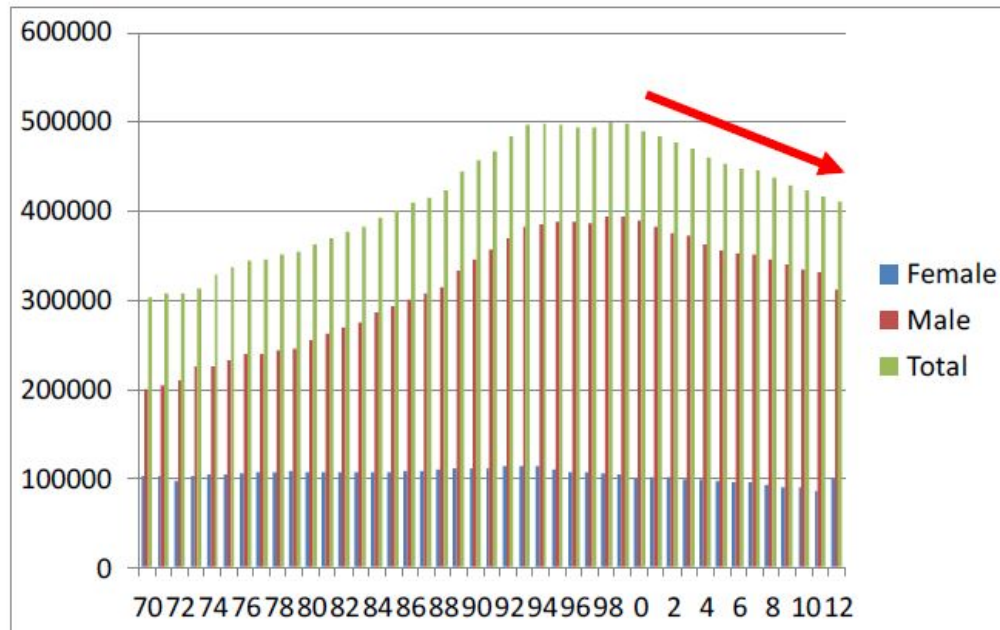
Figure 4 Total participants in top 10 physical activities, 2001-2010.

Source: Standing Committee on Recreation and Sport (2010).

Golf has 1,600 affiliated clubs. They see 200 non-affiliated golf facilities as an important target market.

Golf club membership and affiliates in decline since 2000

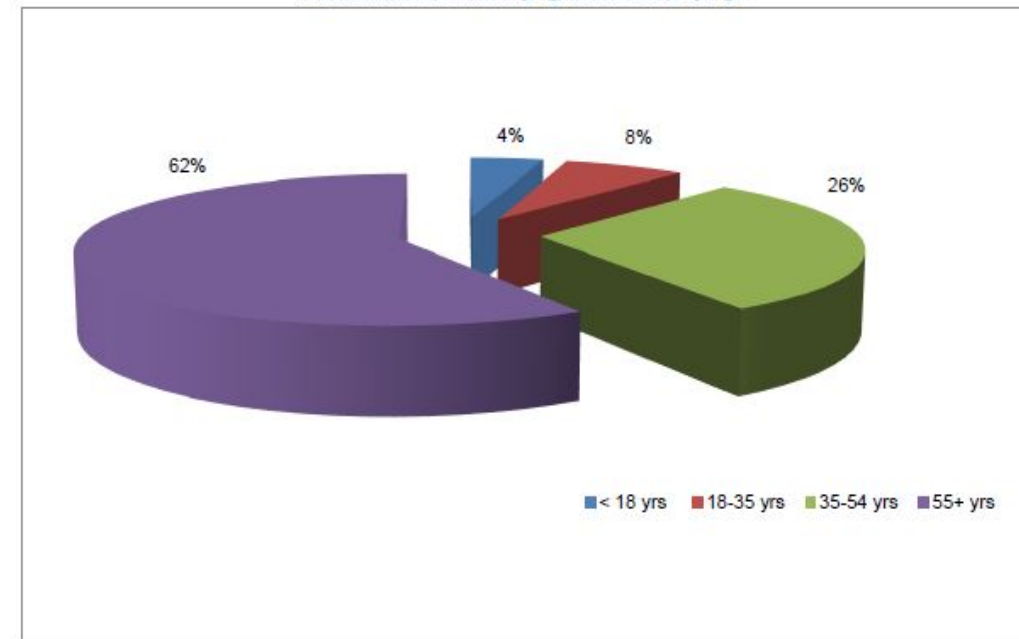
Annual Golf Playing Membership 1970 to 2012



Source: Golf Australia & National Golf Census 2012

Nearly 70% of golfers are aged over 50 Golf a “whole of life” sport

Australian Golf Club Playing Membership by Age



Source: National Golf Census 2012, Street Ryan

Bowls members have fallen 25% since 2000

Similar age profile of bridge of 70%+ over 50

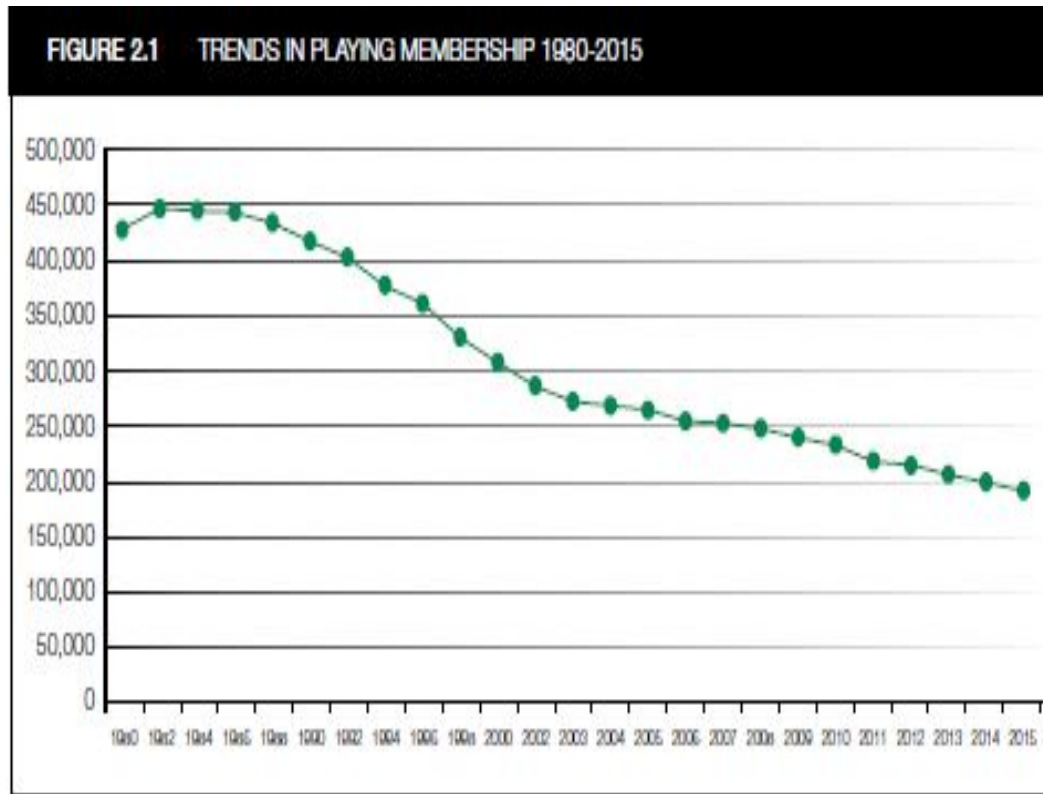
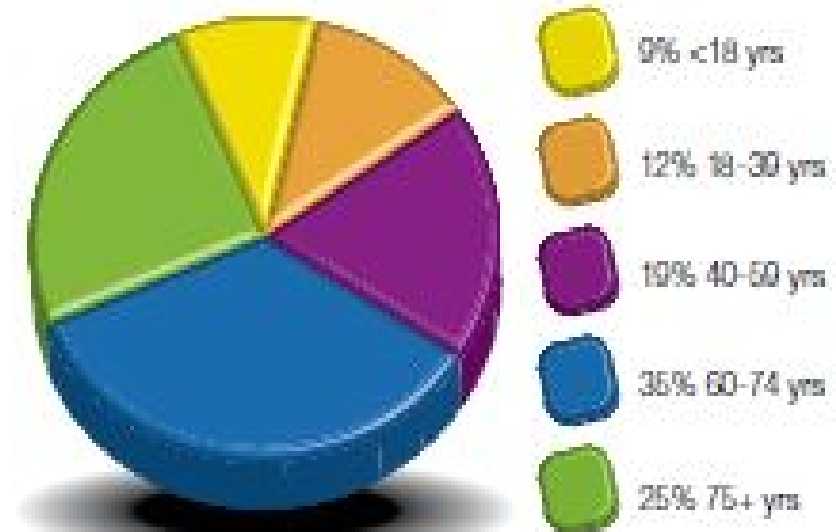


FIGURE 3.3 PARTICIPATION BY AGE GROUP, NEW SOUTH WALES



Bowls also has high frequency players who want to play a skilled, competitive sport with camaraderie and social connections

CHART 12 – TIMES PER MONTH ATTENDING THEIR CLUB

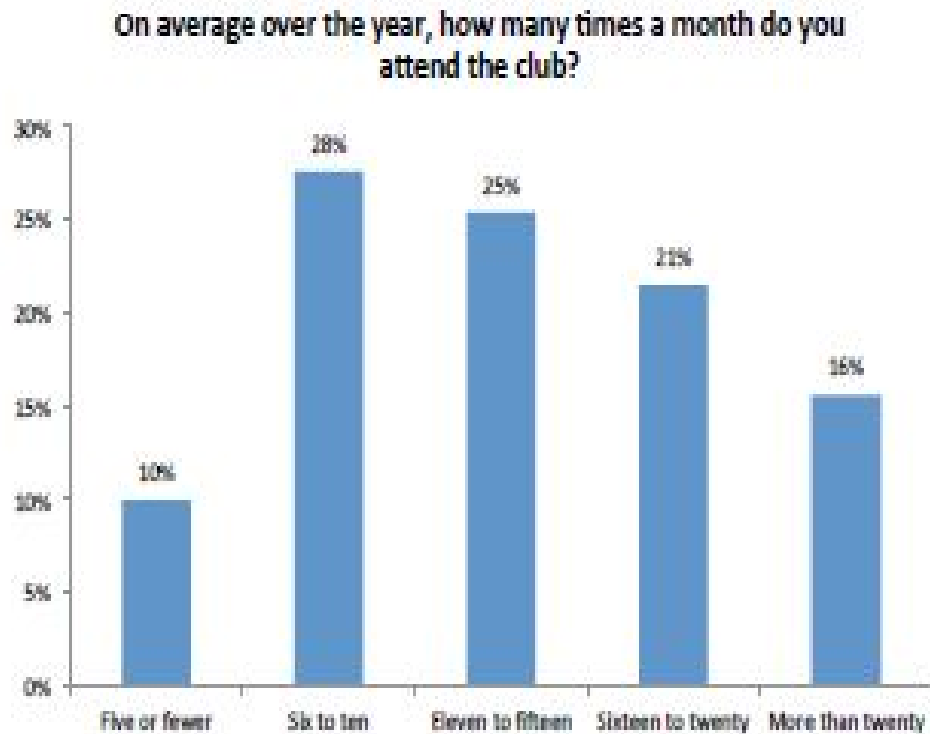
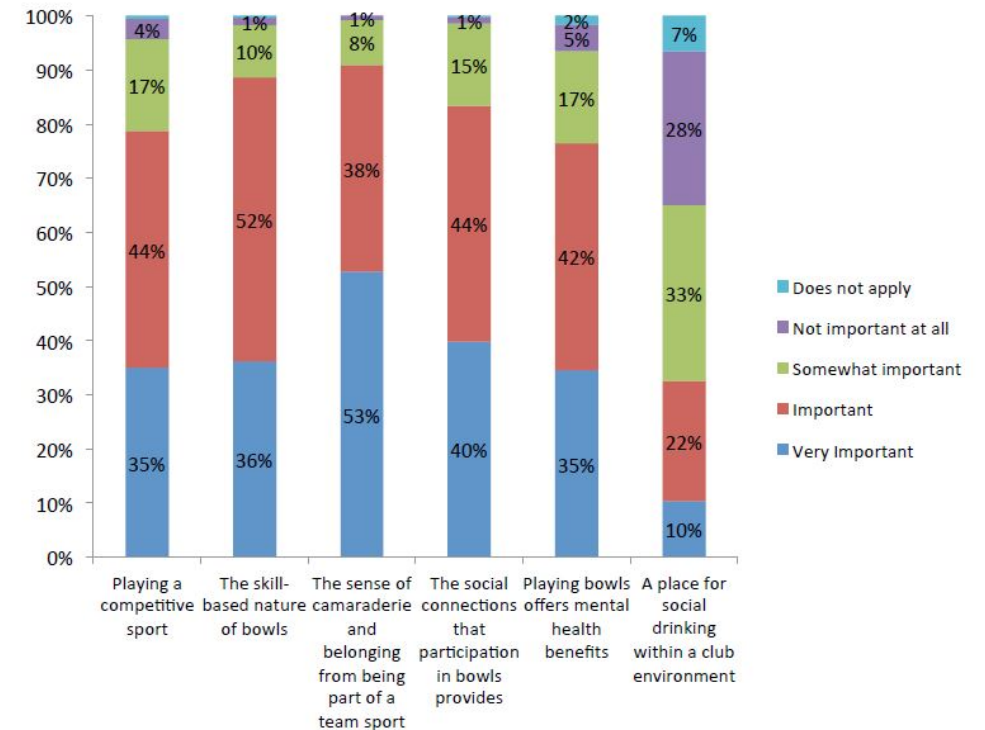
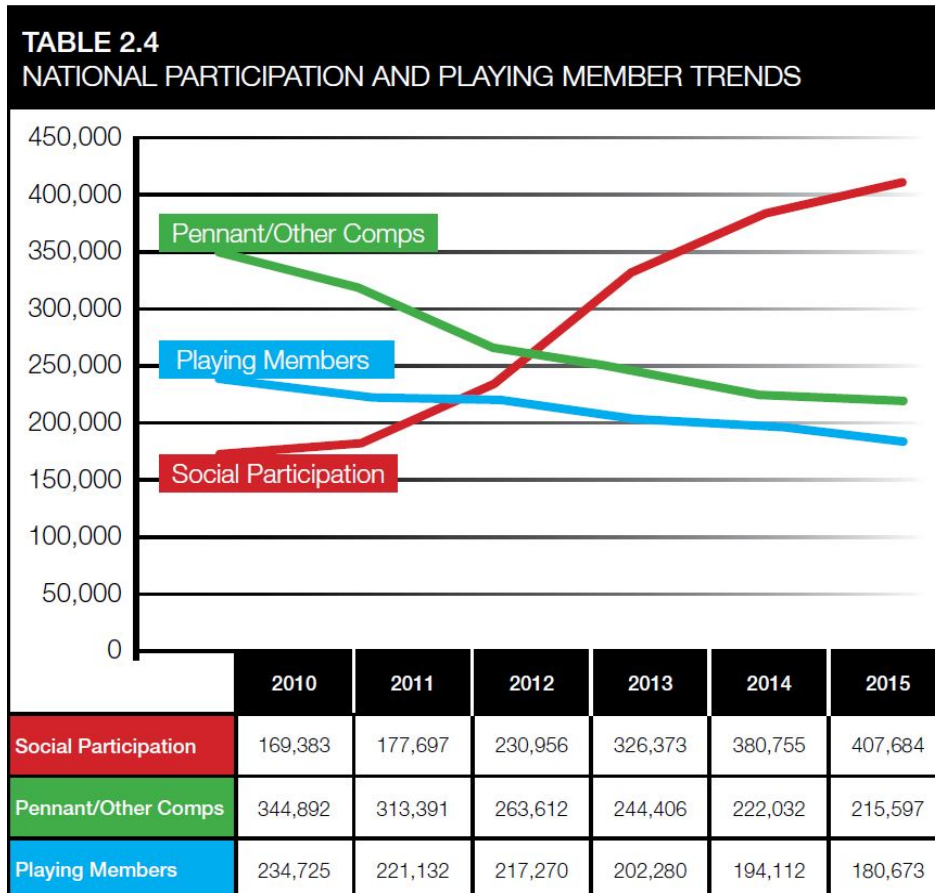


CHART 16 – MOTIVES FOR BOWLS PARTICIPATION

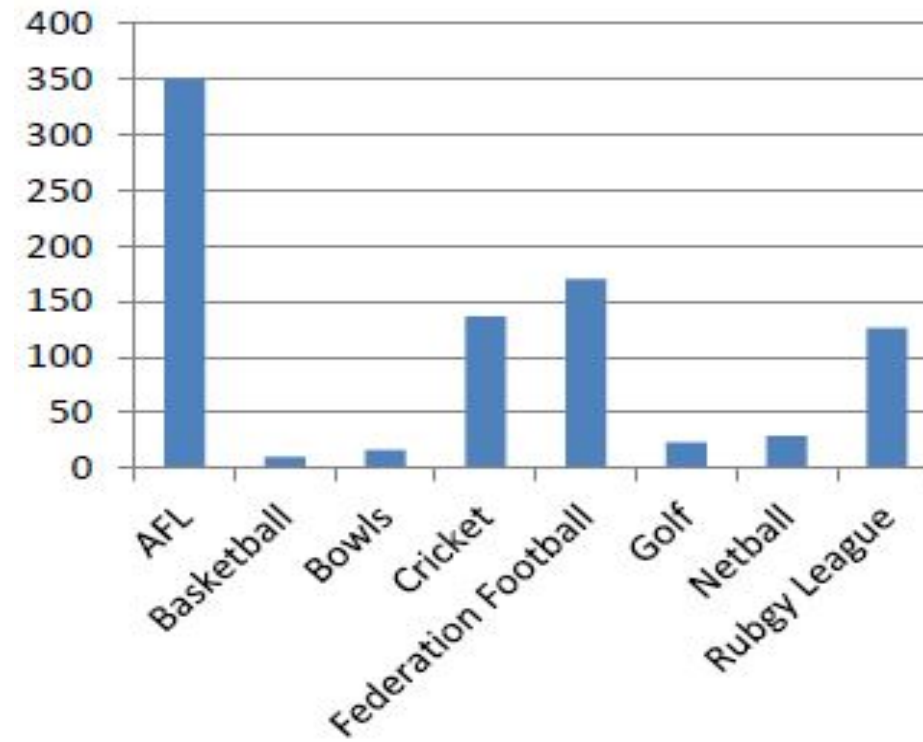
Please indicate how important each of the following reasons are for you participating in bowls



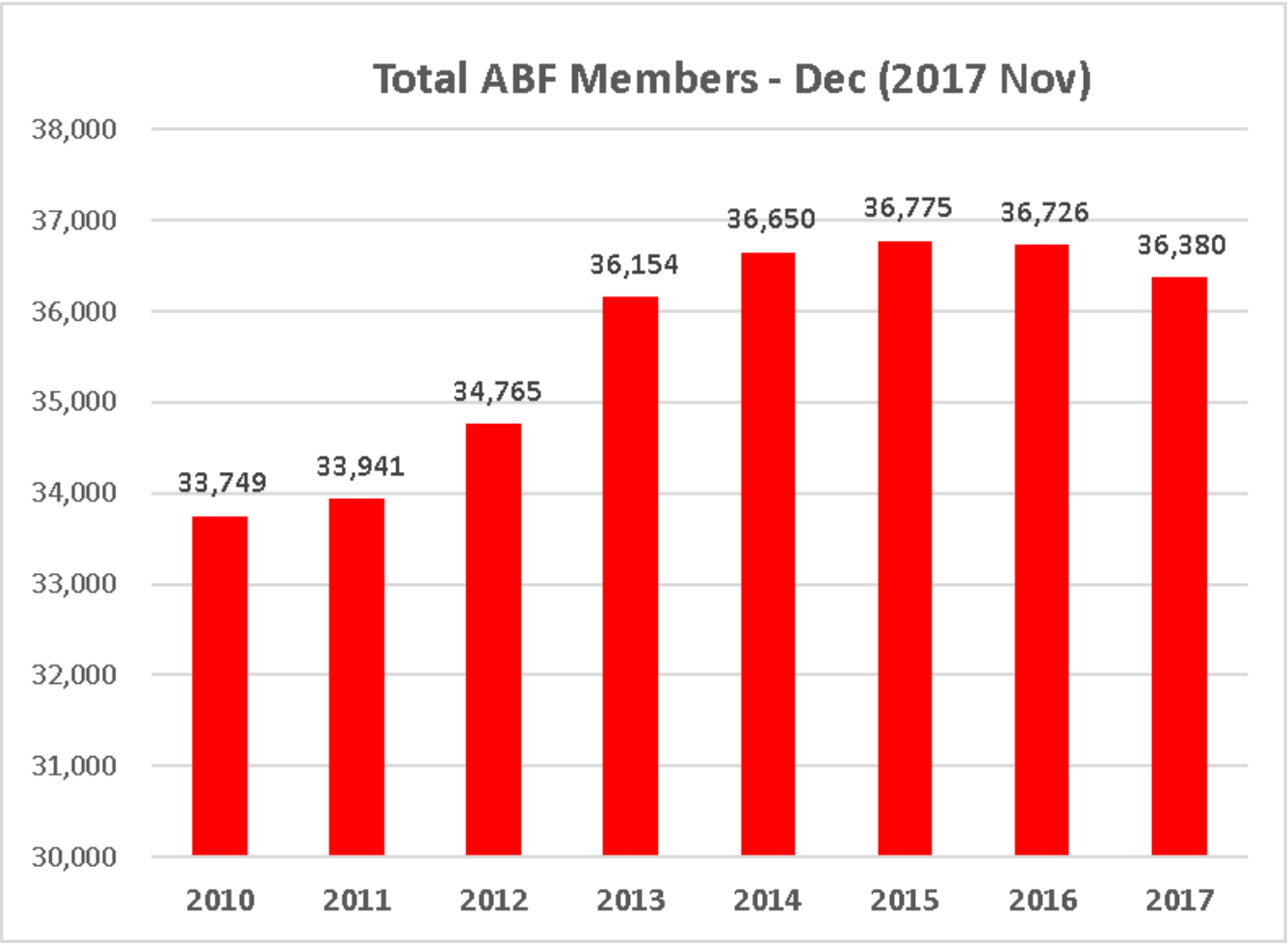
Bowls facing declining playing membership built up social participation



Sports Development Personnel
(Estimated by Golf Australia)

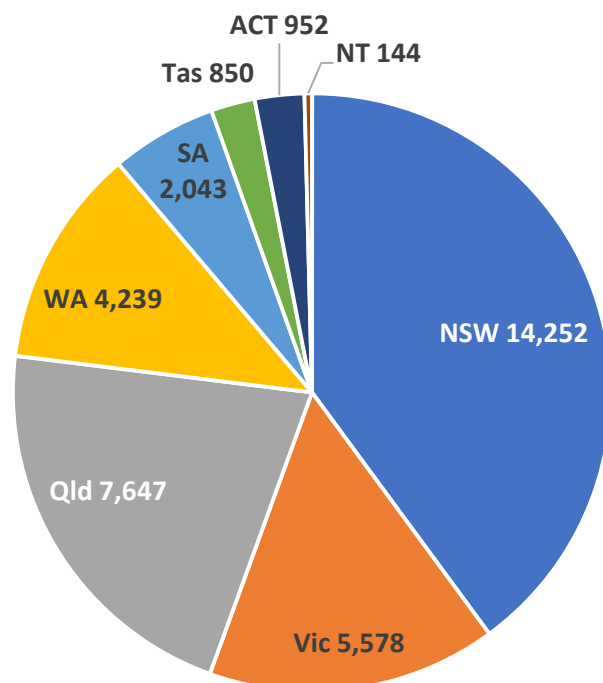


ABF memberships static 2014-2017



Over 60% of ABF Members in NSW & Qld

ABF Club Members July 2016



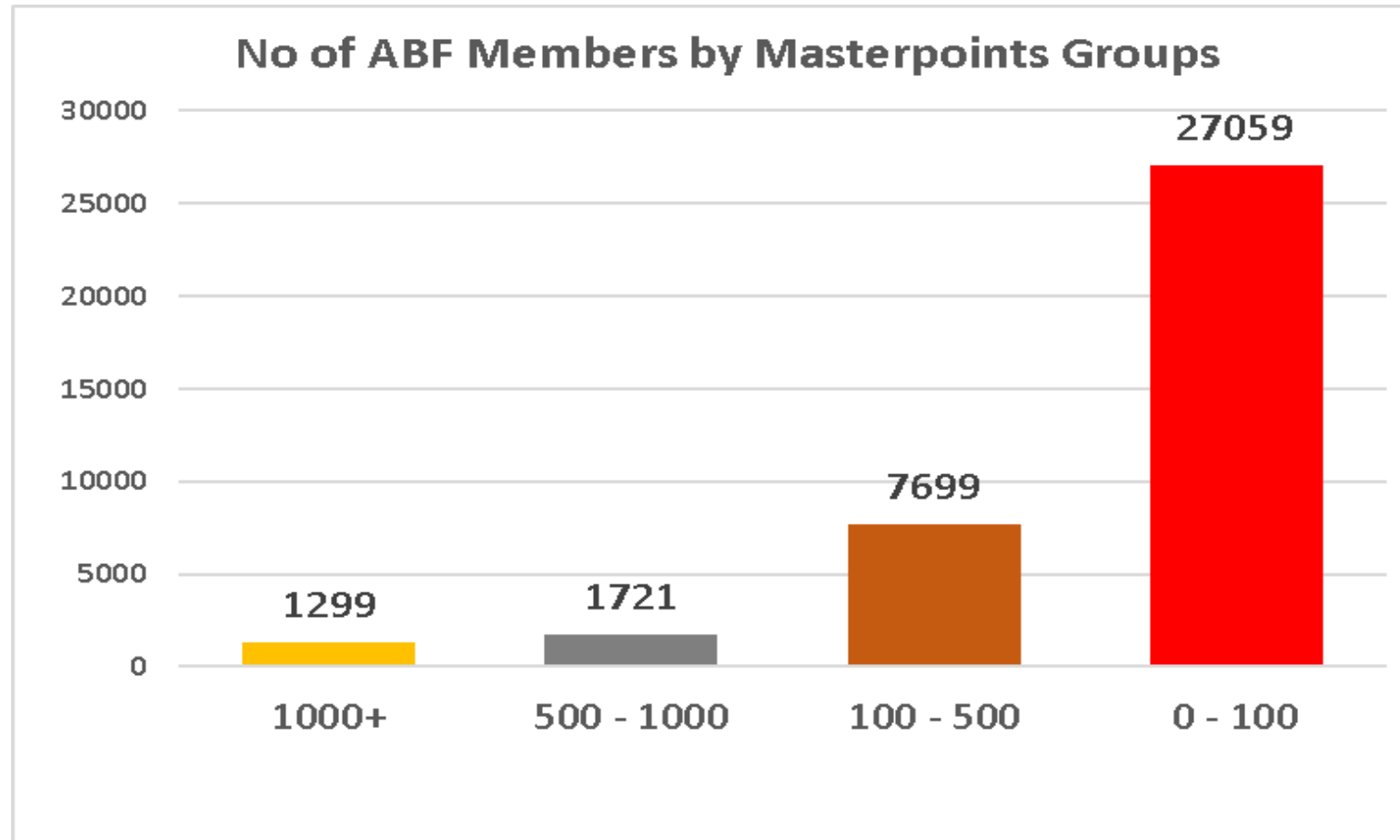
ABF Club Members - July 2017

	ABF Club Members	% of Aust	Index
NSW	14,252	39.9%	125%
Vic	5,578	15.6%	62%
Qld	7,647	21.4%	107%
WA	4,239	11.9%	109%
SA	2,043	5.7%	81%
Tas	850	2.4%	111%
ACT	952	2.7%	163%
NT	144	0.4%	40%
Total	35,705		

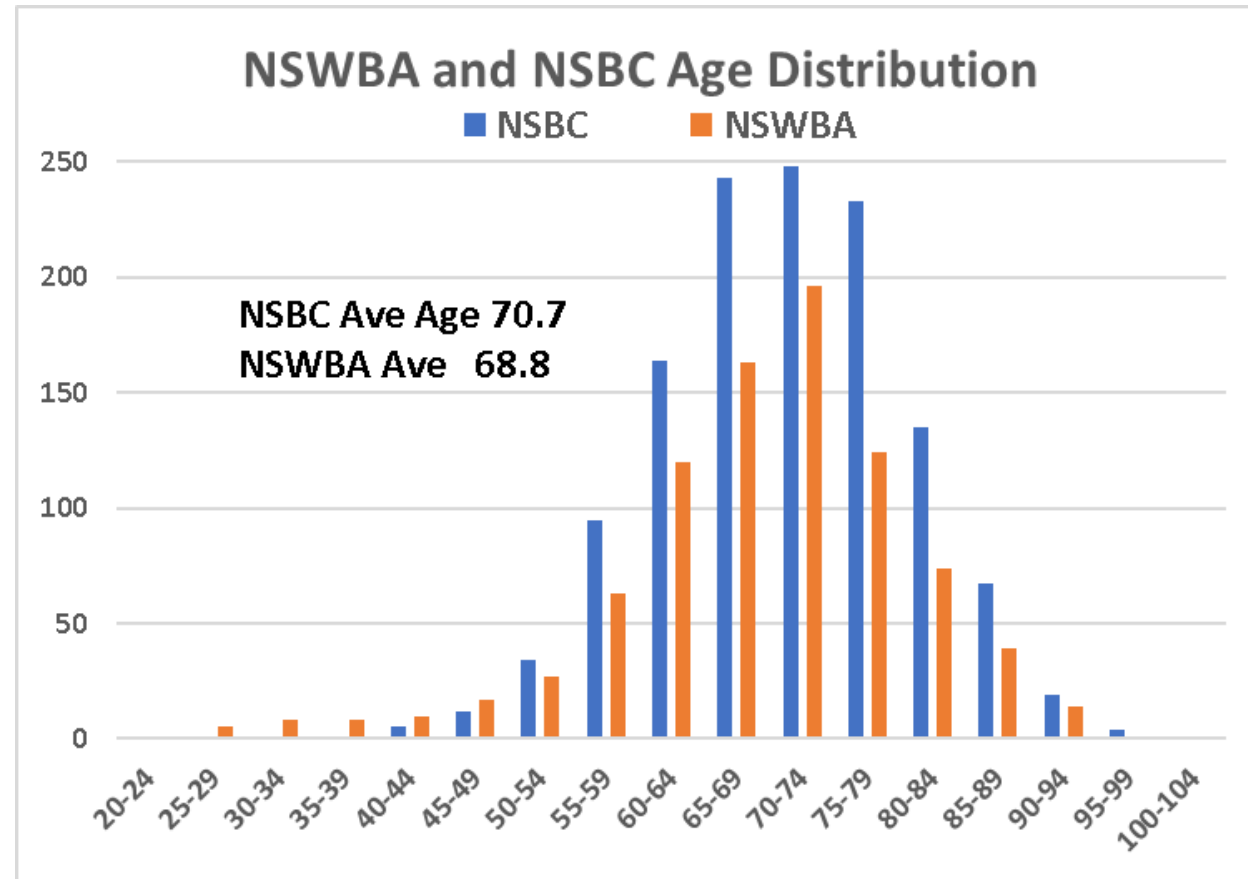
70 clubs have over 60% of affiliated bridge members with only 10 clubs having 23% of members.
 50% of clubs are small with a 12% share.

Size Of ABE Clubs			
Club Share	Clubs	Members	
%	No.	No.	Share
Top 10 Clubs	10	8,115	22.70%
Top 10%	35	16,149	45.20%
10-20%	35	6,492	18.20%
20-50%	104	8,784	24.60%
50-75%	88	3,168	8.90%
75-100%	87	1,112	3.10%
Total	349	35,705	100.00%

Over 70% of ABF members have less than 100 masterpoints

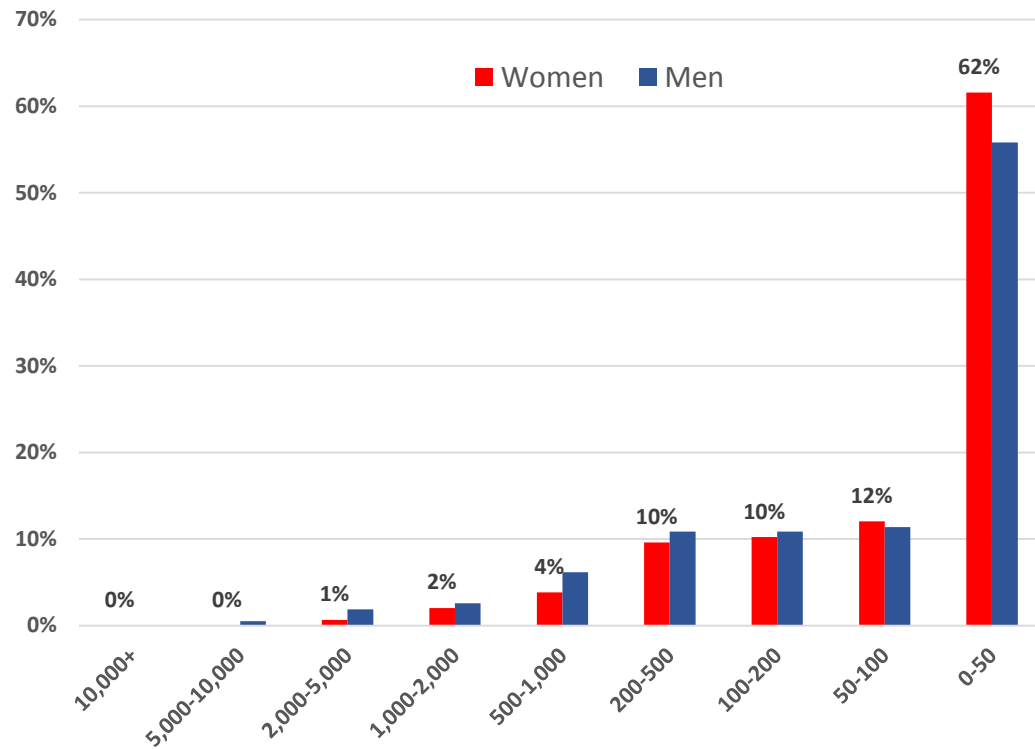


The average age of Bridge Players is 70 and increasing in Australia and the US.

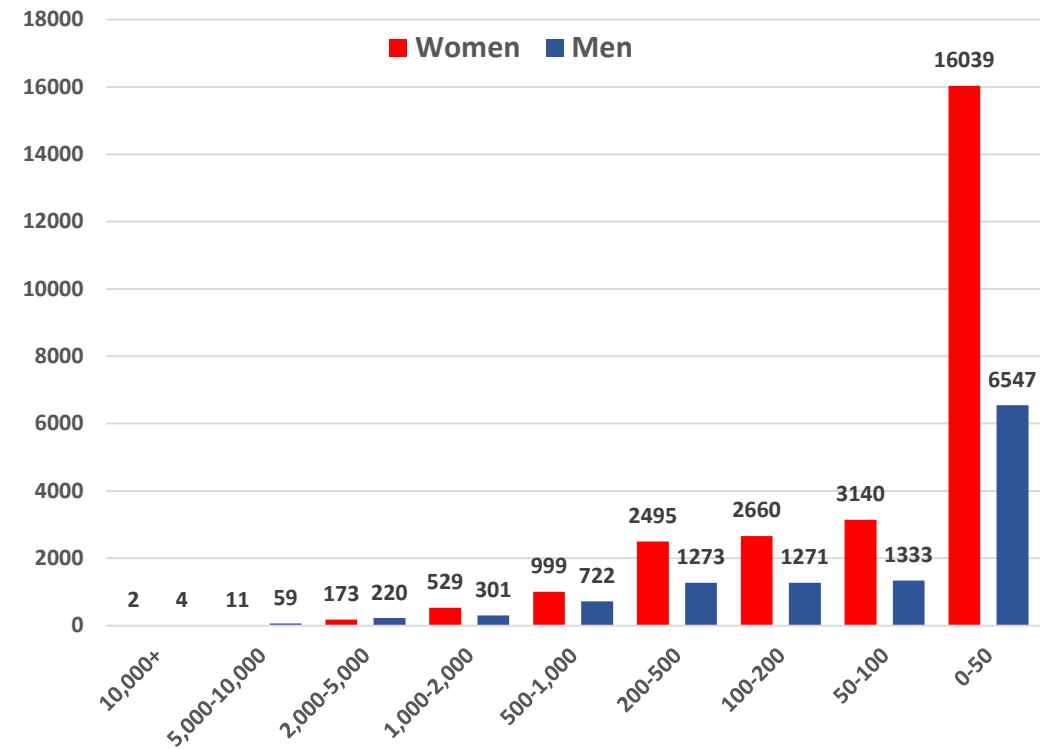


Women are 70% of ABF bridge members and particularly dominate the lower MP categories

ABF Members MP Share by Gender - 2017



ABF Members Masterpoints by Gender



Canberra teams have halved since 2000

Nationals - Canberra									2010-2017		2014-2017		2000
	2010	2011	2012	2013	2014	2015	2016	2017	No	%	No	%	
SWPT	178	164	162	152	156	134	136	126	-52	-29%	-30	-19%	282
Senior Teams	58	46	50	46	50	53	46	34	-24	-41%	-16	-32%	74
Women's Teams	18	28	26	24	22	24	22	24	6	33%	2	9%	80
Life Masters Teams	28	36	38	32	36	28	28	30	2	7%	-6	-17%	
Non-Life Teams	18	20	18	16	10	14	14	14	-4	-22%	4	40%	
Novice Teams	22	20	18	14	10	10	14	12	-10	-45%	2	20%	28
Aus Mixed Teams	22	28	26	22	20	14	14		-22		-20		58
Other Teams				28	24	22	12	27	27		3	13%	96
Total Teams	344	342	338	334	328	299	286	267	-77	-22%	-61	-19%	618
National Swiss Pairs	148	230	204	188	208	202	208	228	80	54%	20	10%	278
Senior Swiss Pairs	66												
Restricted Swiss Pairs			80	80	90	82	30	32			-58	-64%	
Matchpoint SP							34	27			27		
Blue Ribbon Pairs			46			32	84	62			62		
National Flighted SP		32	56	28	26	26	26	54			28	108%	
Aust Novice Pairs	28			12	42	34	20	16	-12	-43%	-26	-62%	
Aust Mens Pairs	14							32	18	129%	32		
Aust Womens Pairs	6												
Aust Seniors Pairs	40												
Aust Mixed Pairs	44												
Open Last Train	24	22	20										
Women's Last Train	16	22	16										
Seniors Last Train	22	16	20										
Rising Stars Pairs							8	20					
Total Pairs	408	322	442	308	366	376	410	471	63	15%	105	29%	

Spring Nationals teams up

Major Congress Entries History														
Sydney Spring Nationals														
	2010	2011	2012	2013	2014	2015	2016	2017		2010-2017		2014-2017		
	Randwick		Canterbury								No	%	No	%
Open Teams	42	42	48	48	48	54	62	62		20	48%	14	29%	
Restricted Teams	14	18	14	20	14	14	18	18		4	29%	4	29%	
Womens Teams	30	24	20	26	16	13	22	18		-12	-40%	2	13%	
Senior Teams	18	20	18	18	16	19	24	22		4	22%	6	38%	
Total Teams	104	104	100	112	94	100	126	120		16	15%	26	28%	
Dick Cummings Pairs	92	100	92	106	94	100	128	130		38	41%	36	38%	
Restricted Pairs				60	36	22	36	36		36		0	0%	
Novice Pairs					18	24	24	18		18		0	0%	
Jacaranda Pairs				34	36	26	28	16		16		-20	-56%	
Total Pairs	92	100	92	166	184	172	216	200		108	117%	16	9%	

Gold Coast success with teams and pairs

Gold Coast Congress													
	2010	2011	2012	2013	2014	2015	2016	2017		2010-2017		2014-2017	
Gold Coast Congress										No	%	No	%
Teams Championship													
Open	214	240	220	200	196	208	206	214		0	0%	18	9%
Seniors	44	46	46	51	46	36	34	40		-4	-9%	-6	-13%
Intermediate	38	48	44	74	84	86	88	94		56	147%	10	12%
Restricted	66	64	64	64	68	34	96	90		24	36%	22	32%
Novice	34	38	30	36	32	34	32	44		10	29%	12	38%
Non-Mixed Teams		28	26	32						0		0	
Total Teams	396	464	430	457	426	398	456	482		86	22%	56	13%
Seres-McMahon SP	58	66	38	36	26	38	36	32		-26	-45%	6	23%
Bobby Richman Pairs	316	304	132	194	198	198	184	186		-130	-41%	-12	-6%
Seniors Pairs	102	98	47	88	70	52	52	48		-54	-53%	-22	-31%
Intermediate Pairs		82	37	102	116	120	124	108		108		-8	-7%
Restricted Pairs	130	122	64	132	126	104	138	138		8	6%	12	10%
Novice Pairs	74	88	40	74	70	100	88	80		6	8%	10	14%
Total Pairs	680	760	358	626	606	612	622	592		-88	-13%	-14	-2%
Wkend Matchpoint Prs- Open				106	144	164	180	158		158		14	10%
Wkend Matchpoint Prs 0-500								88		88		88	
Monday Butler Swiss Prs Open				136	152	156	170	144		144		-8	-5%
Monday Butler Swiss Prs 0-500				58				80		80		80	
Other Novice Pairs		40	40	40	152	228	254	320		320		168	111%
Ivy Dahler Butler SP Open	196	232	224	224	260	254	208	208		12	6%	-52	-20%
Ivy Dahler Butler SP Inter	50		62				84	27		-23	-46%	27	
Ivy Dahler Butler SP Restrict	82	60		54	60	54	72	45		-37	-45%	-15	-25%
Total	328	332	326	618	768	856	968	1070		742	226%	302	39%
Total Pairs	1008	1092	684	1244	1374	1468	1590	1662		654	65%	288	21%

The Gold Coast Congress in 2017 attracted 259 players from NZ, 25 UK and 58 Other O/S

Source: Courtesy of Matthew McManus

Grand Total - all events
%

ACT	NSW	VIC	QLD	SA	WA	TAS	NT	Aus Youth	NZ	UK	other OS/non-ABF/unknown	Total
188	1681	540	2106	270	236	43	23	46	756	59	121	6069
3.1	27.7	8.9	34.7	4.4	3.9	0.7	0.4	0.8	12.5	1.0	2.0	

Individual Players
%

ACT	NSW	VIC	QLD	SA	WA	TAS	NT	Aus Youth	NZ	UK	other OS/non-ABF/unknown	Total
75	769	218	1009	112	80	19	9	22	259	25	58	2655
2.8	29.0	8.2	38.0	4.2	3.0	0.7	0.3	0.8	9.8	0.9	2.2	

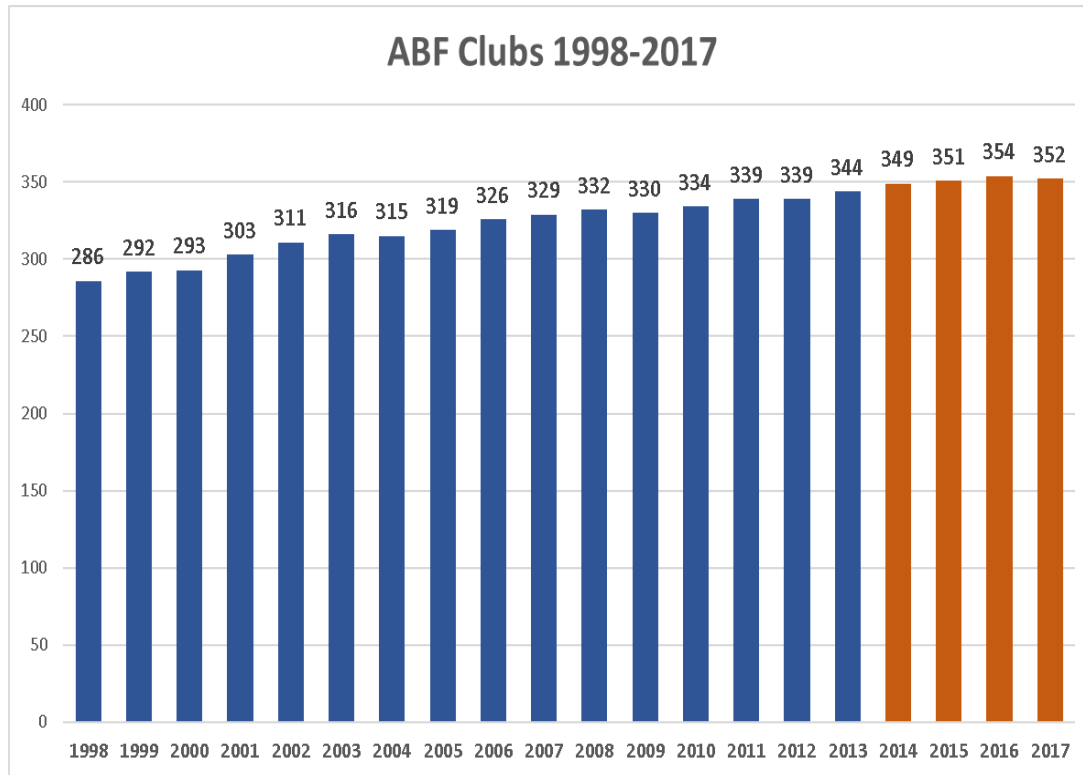
Individual Players - 2016
%

ACT	NSW	VIC	QLD	SA	WA	TAS	NT	Aus Youth	NZ	UK	other OS/non-ABF/unknown	Total
89	669	200	1004	105	78	17	9	14	218	12	50	2465
3.6	27.1	8.1	40.7	4.3	3.2	0.7	0.4	0.6	8.8	0.5	2.0	

Sydney Spring Nationals 2017

	Open T	Rest T	Open P	Rest P	Nov P	Sen T	Wom T	Total	Individual	%
Total	257	72	268	72	36	96	76	877	Total 579	100

ABF Affiliated Clubs flat but appears to have fallen in 2017



Size Of ABF Clubs

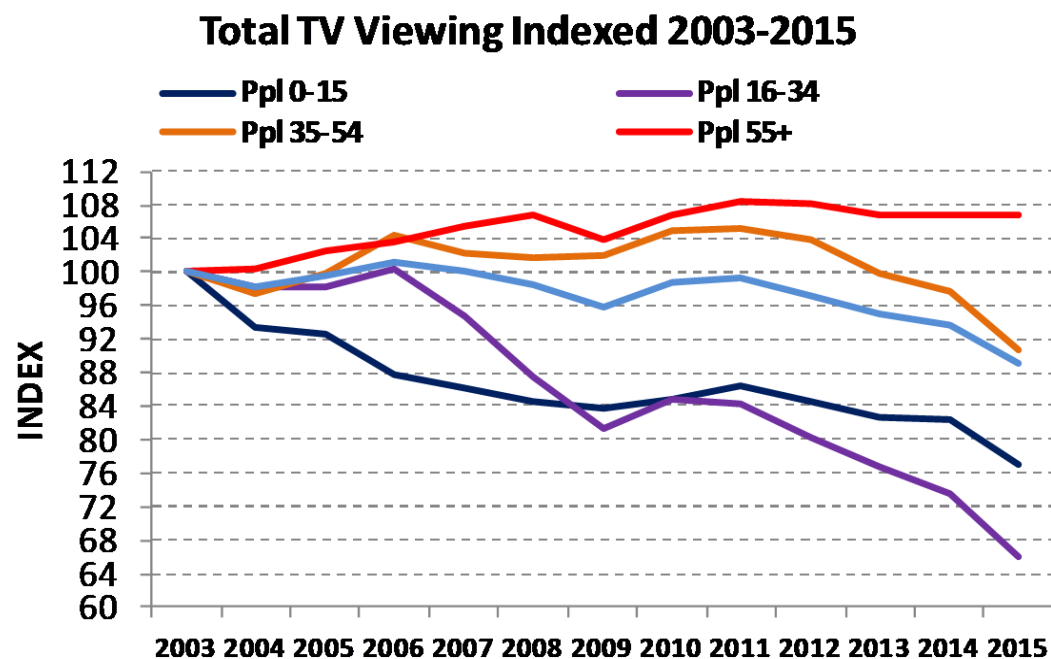
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Top 10%	35	16,149	45.20%
10-20%	35	6,492	18.20%
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50-75%	88	3,168	8.90%
75-100%	87	1,112	3.10%
Total	349	35,705	100.00%

To maximise the number of ABF members and revenue and to replace people who leave the ABF (churn) requires all or some of the following:

- Increase in beginners with highest retention possible
- Retention of existing members and improve customer loyalty
- Increase in frequency of playing
- Growth in number of clubs to serve more communities
- Conversion of non-affiliated players to ABF members
- Converting non-affiliated clubs to ABF affiliation
- Increasing the number and frequency of members playing in ABF events

The growth of the Internet and the rise of the 4 FANGs (facebook, Amazon, Netflix, Google) changed viewing habits and brought Digital Disruption to many industries

Young people spent increasing time online; emails, social media, gaming, eSports, VOD



Businesses disrupted include:

- Newspapers and Magazines
- FTA TV and Pay TV
- Movies and Cinemas
- VOD - Netflix
- Social Media (facebook, Twitter, Instagram)
- Banking, Travel, Retail, Telcos
- Uber, Airbnb

Can AFLX follow The Big Bash, Rugby Sevens, X Games and pave the way for BridgeX

The X factor: Will AFL's new concept work?

Matt Thompson | October 25, 2017 5:22 PM

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RSS Newsletter



Will AFLX be a success?

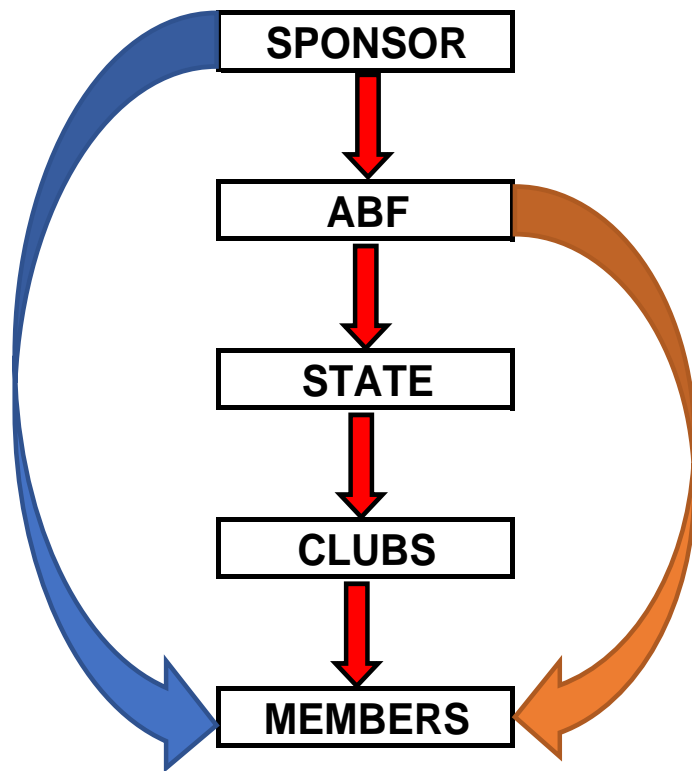


BBO - ACBL Masterpoint Tournaments

- BBO is an [ACBL-sanctioned](#) bridge club. Our ACBL games issue ACBL Masterpoints. We run several types of ACBL games. Here is some information about the various tournaments:
- These sanctioned games have an entry fee, ranging from \$1.25 or more.
- All issue ACBL (and BBO) masterpoints, and are open to all. ACBL membership is not required to play in these games.
- Only [General Convention Chart](#) conventions allowed.
- Usually 12 boards long.
- Speedball pairs games consist of 12-boards, last just under an hour, start on the hour, and run 24 hours a day
- Speedball individual games consist of 12-boards, last just under an hour and are available from 8am to 1am daily
- ACBL Robot individual games can have 12 or more boards, are available 24 hours a day and last up to an hour.
- Pair games are **stratified** and offer both section and overall awards.
- Masterpoints reported monthly (on the 1st) to ACBL headquarters and visible on the ACBL website a few days later.
- Masterpoints won online are colorless points but count for rank advancement the same as any other points.
- Our ACBL directors are called ACBL_01, ACBL_02, etc..
- You can email acbl@bridgebase.com with any ACBL issues.

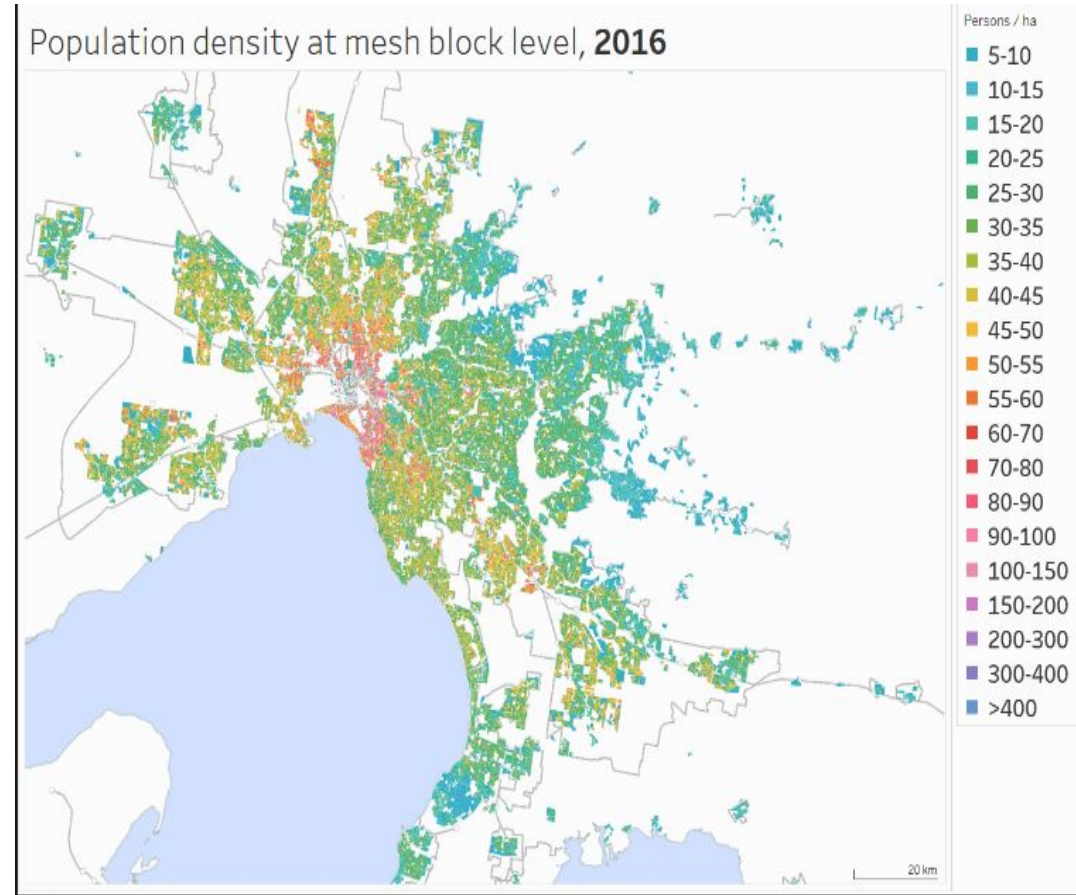
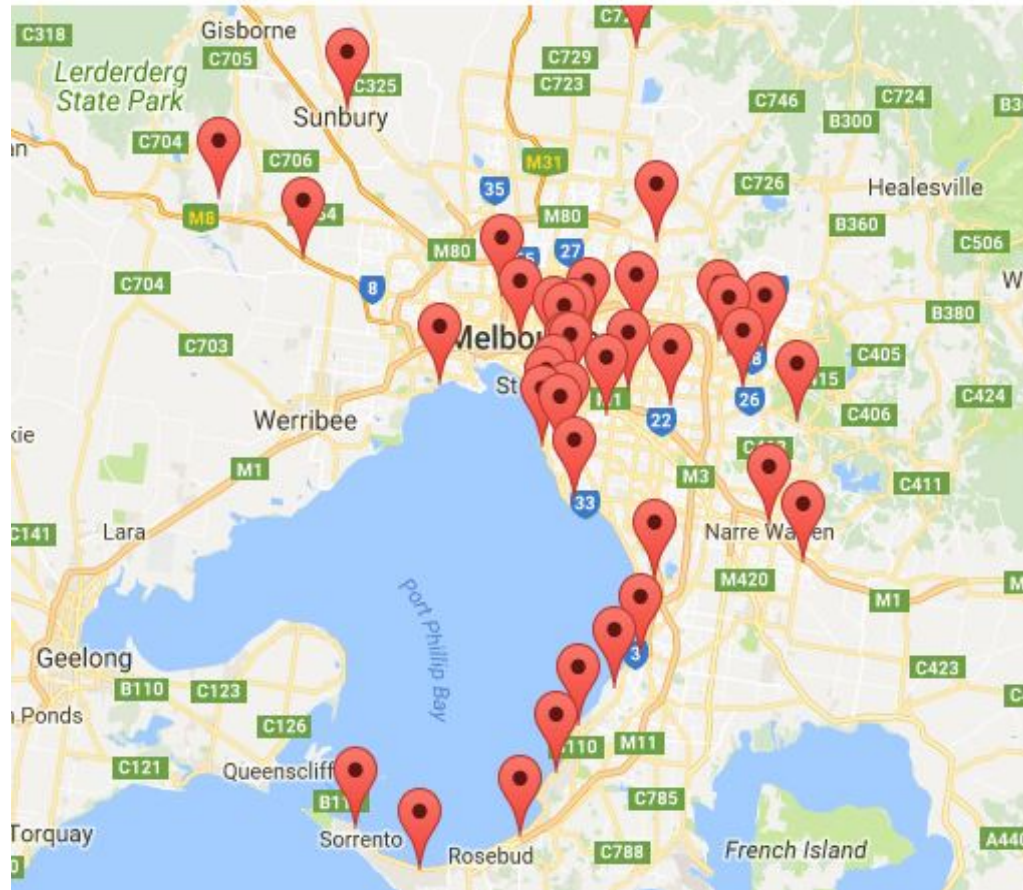
Modern Digital Marketing requires:

ABF Flow Chart



- Direct relationship to the Consumer
- Addressable Marketing
- A central data base
- Attraction and Attrition Rates
- Analytical abilities and Insights
- ABF newsletter to all members
- Ability to survey or poll members
- Reach 36,000 members for sponsors

Melbourne Bridge Clubs by population density



The Need for Change

- The number of players and clubs are static and facing decline
- ABF PQP event entries fallen dramatically from 2000
- Ave player age 70 and increasing with lifestyle changes
- Attrition higher than acquisition of new members
- Death of night time bridge
- Difficult attracting Youth players with growth of eSports and X Games
- Growth in alternative recreational pursuits
- Effectively No Marketing budget

Vision Statement

**Players, clubs, state bodies, congresses and the ABF
all need to be motivated to drive change**

- Players
- Clubs
- Congresses
- Champions and Legends
- Technology
- ABF restructuring (later)

Vision – making players the advocates for Bridge

Players

- Making the players the heroes with ratings, prizes and trophies
- Bridge club Holidays and social activities from clubs and ABF
- Online video learning and apps to attract new players
- Players to teach and encourage own children and grandchildren

Clubs

- Standards - friendly, facilities, accredited teachers/directors
- Teaching beginners, supervised, flighted, timing of sessions
- Star awards for Clubs achieving success
- Volunteers Awards and Recognition
- School holiday camps for children, shopping centre demos
- Successful clubs featured in ABF newsletter and Online

Vision – make bridge Inspiring and Aspirational

Congresses

- Creative developments in events, formats, length, times, locations
- Fit lifestyles of mature market for duration and sociability
- Energise events with video coverage of players and award ceremonies
- Consider changes to the GNOT

Champions and Legends

- Create sporting heroes of champions as in other sports
- Develop ratings system for leading players as in golf and tennis
- Create online profiles and videos of champion players

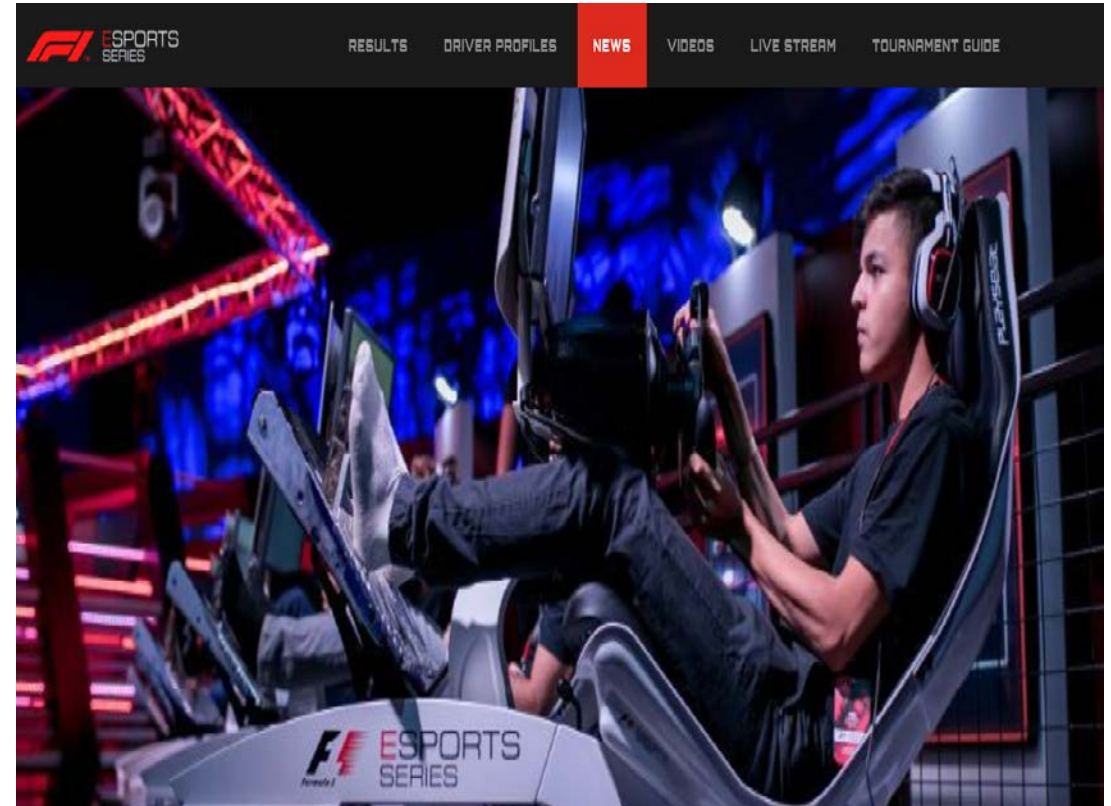
Vision – engage with members through technology

ABF

- Create National database of 36,000 members email addresses
- Ability to directly communicate with members
- Benefit to ABF marketing, TOs, Newsletter, Sponsors and Advertisers
- Create apps for learning and playing bridge on smart phones, tablets and lap tops
- Apply to have ABF Member site and masterpoints on BBO
- Use technology to reach and teach Youth players to compete online with video games and eSports

Bridge – Anytime, Anywhere, Anydevice and Anybody

Bridge needs to change to attract a younger players and grow an older generation



20 F1® ESPORTS SERIES FINALISTS DECIDED AFTER SENSATIONAL SEMI-FINAL