

Marketing Bridge in the Future

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BAMSA 2021 Session 4B Marketing Bridge

- A background 'Australia – The Post Covid Experience' is presented in the advance recording for session 2A titled the Impact of a Global Pandemic on Bridge
- The presentation looks at the experience in Australia where bridge returned to clubs from about September 2020, the impact of Covid on attendances, the loss of members and the challenges facing bridge clubs and congresses around the world
- Both presentations include findings and recommendations from a major Australian research report "ABF Bridge Player Survey 2020-21"
- The survey in December/January generated an amazing 2,500 responses
- It demonstrated the concern that many Australian bridge players have for the future of bridge

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The Future Marketing of Bridge

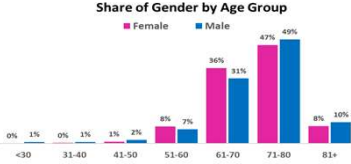
- In advance recording for the earlier session 2A Australia – The Post Covid Experience we established that most Australian clubs had reopened in September 2020 and certainly by December 2020
- However, because of the Covid closure a years beginners classes had been lost and not all players had returned to clubs.
- This resulted in a loss of over 3,500 members or 11 per cent of our members and that numbers of table played fell by 28% in the December 2020 Quarter and by nearly 12% in the Jan-March Quarter 2021**
- I am particularly concerned that Covid may be a tipping point** for bridge faced with an ageing cohort, growing attrition, a competitive leisure market, declining volunteers, low retention rates, poor behaviour and falling membership
- This recording analyses the behaviour of bridge players and clubs, the threats to the economic model for bridge and makes suggestions for the marketing and management of bridge to grow in the future

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Share of Gender by Age Group



Age Group	Female (%)	Male (%)
<30	0%	1%
31-40	0%	1%
41-50	1%	2%
51-60	8%	7%
61-70	36%	31%
71-80	47%	49%
81+	8%	10%

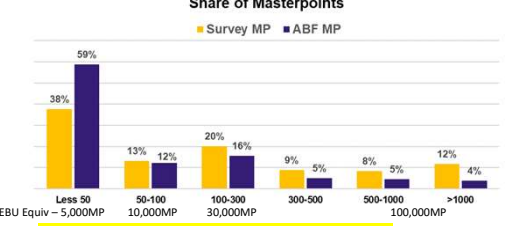
- The average age of the respondents was 70.2 yrs for Females and 70.5 yrs for Males. **The average age of all ABF bridge players is about 74 years** and growing by half a year each year
- Life expectancy for Females is 84 and Males 80 years, as a result the attrition rate is high at about 10% threatening the future of bridge (ABS)
- Females were 64% and Males 36% of respondents. This is less than the average bridge **ABF ratio of 70% Women and 30% Men**. Nearly Nil respondents under 40
- Bridge starts at age 50 for empty nesters and retirees looking for a hobby or leisure interest. Average age of beginners is late 60s

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Share of Masterpoints



EBU Equiv	Survey MP (%)	ABF MP (%)
Less 50	38%	59%
50-100	13%	12%
100-300	20%	16%
300-500	9%	5%
500-1000	8%	5%
>1000	12%	4%

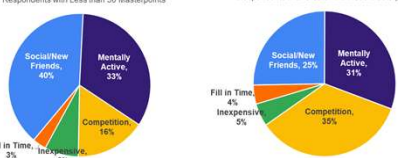
- The rookies and novices <100MP constituted only 50% of respondents compared to the ABF average of 70% of players**
- This meant that the higher level masterpoint players were over represented and responses to some questions are reweighted to give a truer picture

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Why Do You Play Bridge?



Reason	Less than 50 MP (%)	Greater than 1000 MP (%)
Social/New Friends	40%	29%
Mentally Active	33%	31%
Competition	16%	35%
Fill in Time	3%	4%
Inexpensive	8%	5%

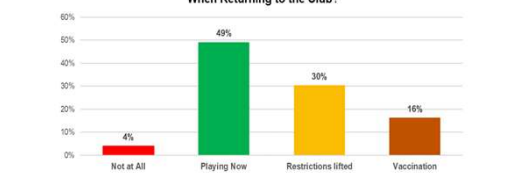
- The social aspect including making new friends is the most important factor in playing bridge for over one third of players.** If reweighted for lower ranks then social factors at 40% are even more important
- This is extremely important to the success of clubs and congresses both f2f and online
- Online needs to be able to provide a social environment as well and the provision of video and audio, such as in RealBridge, helps provide the F2F experience of talking to the opponents and partner
- Concern with mental health is very important to about a third of players
- Competition is more important for players with over 1,000 MPs (EBU 100,000)

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When Returning to the Club?



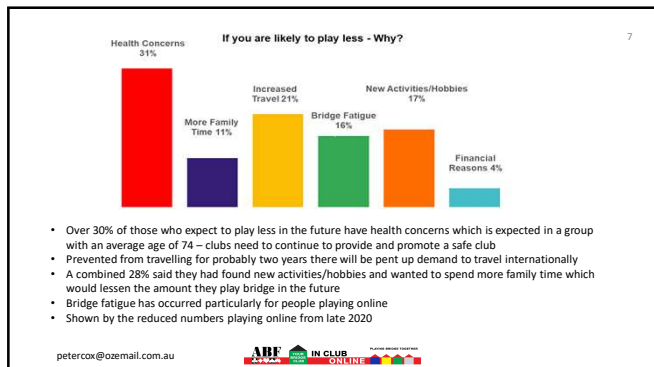
Category	Percentage (%)
Not at All	4%
Playing Now	49%
Restrictions lifted	30%
Vaccination	16%

- Half of all players were back to playing at a club at end December 2020
- 30% were waiting for restrictions to lift and a further 16% when vaccinated
- This is a slow hesitant process and 4% say they are not coming back at all
- Consistent results across all levels of players

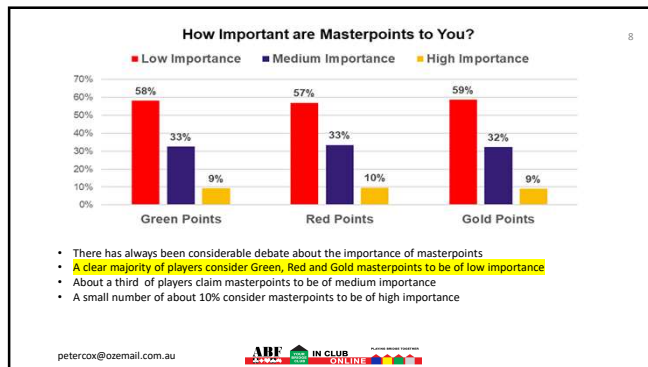
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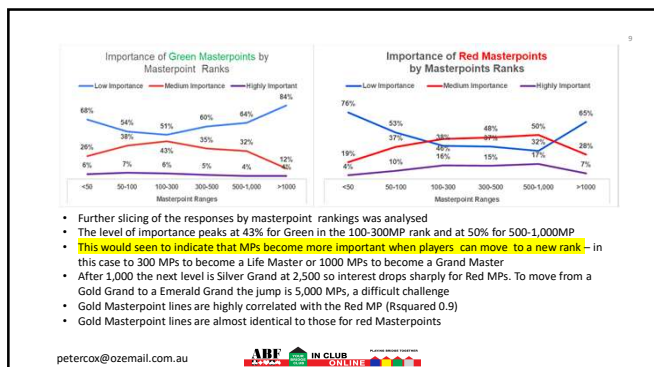
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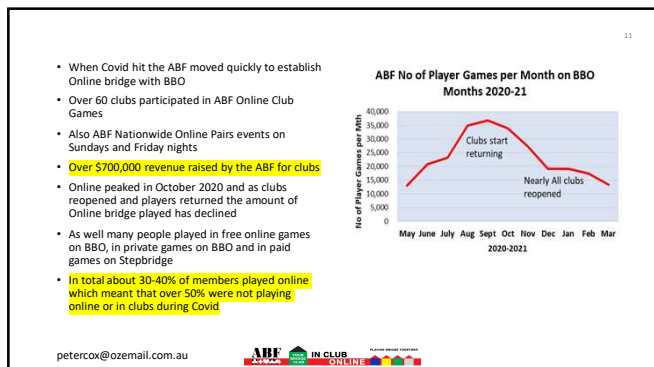


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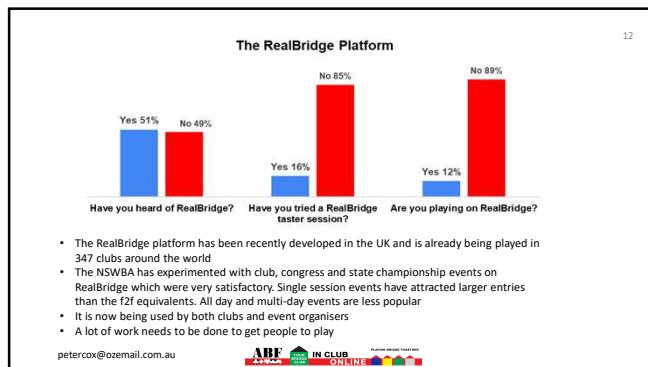
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How do you plan to play bridge in the Future? F2F is face to face bridge in a club

- 53% of respondents said they intend to mostly play F2F bridge with some online play
- 22% only wish to play F2F, 23% prefer Mostly online with some F2F
- 2% intend to play Only Online in the future
- Competition is growing in the online platform market
- with BBO, Stepbridge, Real Bridge, Funbridge, RealDeal and more to come,
- all providing improved products to replicate and drag market share from F2F bridge.

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ABF Bridge Player Survey Comments

Net Promoter Score - Number Of Comments

- The Net Promoter Score (NPS) is used by many of the leading companies in the world to measure customer loyalty or views
- Each comment was classified as either:
 - Detractor (a negative comment on the theme)
 - Passive (a balanced or neutral comment)
 - Promoter (a positive view on the theme)
- The number of comments for each theme were classified as in the chart opposite
- Clubs received the highest number of comments with over 50 and Face to Face and Social also related to clubs
- Online bridge was a very popular source of comments led by BBO with 50 but also Real Bridge and Stepbridge
- Partners and Cheating had relatively low mentions
- Covid was referenced with some strong views
- It was pleasing that a number of people were complimentary of the ABF and appreciative of the Survey

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National Bridge Organisations Members

- Membership of the EBU had peaked in England in 2014 and then was in a slow decline until 2019
- In Australia membership also peaked in 2014 and was in decline until 2019 when marketing effort increased
- The closure of all clubs and congresses in March 2020 coincided with the membership year end at March 31 and most clubs cleaned out their deceased and inactive members to avoid paying memberships for 2021
- The timing of Covid also coincided with the main period for teaching of beginners and the ABF lost a whole years intake of new players
- The loss of over 3,500 members or 11% during the Covid period is substantial
- Many clubs only renewed active playing members as at March 31 though this will improve in 2021 as members return and need membership to earn masterpoints and play in congresses
- Face to face congresses in Australia have begun again in April 2021 and early comparisons show a small decline on the pre Covid period

EBU and ABF Membership 2011-2021

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Growth in Members 2012-2020

- This chart emphasises the loss of players in Australia following Covid in a country with less than 3,000 deaths and, so far, no significant second wave
- In the Qtr Oct-Dec 2020 the amount of bridge played in clubs was 28% less than the comparable period pre Covid but in the Qtr Jan-March 2021 this loss had been reduced to 11.7%
- The ACBL members are a trend taken from intermittent release of membership numbers and compared to published ACBL tables played including online
- The USA had been losing nearly one per cent of members each year since 2002 and the numbers of clubs have been in decline
- Bridge was struggling around the world to maintain members before Covid with an aging cohort, growing attrition, competitive leisure market, declining volunteers, low retention rates and poor behaviour
- The pandemic may be the tipping point for greater losses in the future and a threat to our great game

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The Economic Model

- The relatively small number of people who belong to NBO (National Bridge Organisations) affiliated bridge clubs make the Customer Acquisition Cost (CAC) from main media advertising - national television, major newspapers and commercial radio - too high and uneconomic for bridge
- The cost of retaining and increasing the playing frequency of existing members and encouraging them to promote bridge in their communities is only a fraction of the cost of acquiring new customers
- The Average Revenue Per User (ARPU) ranges from an average of \$260 per year in Australia at \$5 per game to nearly \$800 at \$15 and for high frequency players can be thousands of dollars per year
- Australian research shows that the majority of players are in retirement, financially independent, own their homes but are often on fixed incomes and cost conscious
- The acquisition of new players, even if largely in their 60's with further bridge life expectancy of 10-20 years, and using a discounted cash flow provides a valuable Net Present Value to invest in local marketing, advertising and promotion
- In Maslow motivation terms aspiring bridge players are beyond the basic needs but need a sense of belonging, friendships, self-esteem and achievement though not necessarily realistically expecting high self-actualisation of becoming a champion player
- Is your club providing the friendly and welcoming environment to satisfy these needs?

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Average number of Members per Club

- EBU 91, ACBL 61, ABF 108(88 Post Covid)
- Most clubs, and in particular smaller clubs, have limited teaching and management expertise with few supervised sessions and are often financially challenged
- 30% of clubs have less than 5 members and are in danger
- Players do not necessarily want new members to compete for masterpoints (Golf example)
- Clubs often just provide a Community service at the least possible cost rather than paying a slightly higher playing cost to create a robust, healthy club with good facilities
- Bridge Clubs, like most other organisations, are often fieldiums with competition for administrative and management power and do not want outside interference
- How do we activate clubs to use NBO marketing and management expertise?

Australian Clubs Ranked by No of Members

March 31, 2021 Post Covid Cancellations

- Top 20% of clubs have 64% of Members
- Top 50% of clubs have 88%
- Bottom 50% have only 12%
- Average club has 89 members
- 30% of clubs have less than 25 members

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TEN POINT PLAN FOR BRIDGE GROWTH

1. **Social** – creating a very friendly club that is fun and an activity perceived as good for mental health
2. **Members** - EBU 55,000 strong Sales force – understand and motivate them to bring friends
3. **Traditional marketing** – emails, leaflets, media releases, local papers and radio
4. **Social Media** – advertising with Facebook, Google, Instagram is more highly targeted
5. **Teaching** – Bridge teaching on Demand, Online Teaching in the future
6. **Retention** – the Buddy System to retain beginners to members
7. **Incentives** - Grants and Advertising subsidies to encourage local advertising
8. **Online** – embrace in F2F clubs, convenience, partners not required
9. **Congresses** – select and promote social aspects, location, accommodation, restaurants
10. **Workshops** - Marketing and Management advice available free to all clubs

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The Future Marketing of Bridge

- As further background look at my Advanced Recordings for the BAMS Session 2A 'Australia – The Post Covid Experience'
- Please join the 4B 'Marketing Bridge' session live on Thursday 1 July at 16.30 BST
- The information in these slides are only brief excerpts from the "ABF Bridge Player Survey 2020-21" that are more relevant to the BAMS Conference and the international audience
- The original Survey report with 2,500 responses runs for nearly 50 slides with Insights and Recommendations plus a separate analysis of comments from about 200 of the respondents
- If you would like to discuss the findings in more length or have a Zoom session to Grow Your Club then please contact
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