

Bowls NZ CENSUS – EXECUTIVE SUMMARY

Report for Centres, March 2018

The census of all Bowling Clubs was completed in December of 2017. What follows is an executive summary highlighting summary numbers and key trends. This information should be shared with the wider Bowls New Zealand community via the clubs and centres that participated in the census.

Through the delivery of this census, Bowls New Zealand now has meaningful data from which to make future decisions, as well as an accurate benchmark from which to measure future growth:

Clubs and Centres

1. The number of clubs affiliated to Bowls New Zealand at December 2017 was 500. This compares with 589 clubs in 2010. The majority of the closures, were the merging of separate men's and women's clubs to form one club, along with the closure of small rural clubs.
2. There are 297 clubs in the North Island and 203 clubs in the South Island.
3. There are 27 centres in New Zealand, with the largest centre, by club, being Canterbury (55 clubs) and the smallest Buller (6 clubs).

Membership and Casual Participation

4. There are 25,534 full playing members of bowling clubs. In addition, there are another 10,030 social members of bowling clubs. Combined this makes our registered membership 35,564.
5. Casual playing numbers for all bowling clubs (independent of membership) was 77,399; meaning the total participation in 2017 was 112,983.
6. Membership of bowling clubs is represented by 66% male and 34% female.
7. There were only 144 school aged members in 2017, further acknowledging that the membership of bowling clubs is almost entirely adult.
8. The full playing membership (25,534) has the following age demographics:
 - a. Over 70 = 47%
 - b. Between 60 and 70 = 30%
 - c. Between 50 and 60 = 13%
 - d. Under 50 = 10%
9. The casual participation (77,399) is predominantly under 50.
10. The breakdown of club size by membership is as follows:
 - a. < 10 members = 11 clubs
 - b. Between 10 and 20 members = 62 clubs
 - c. Between 20 and 30 members = 55 clubs
 - d. Between 30 and 50 members = 106 clubs
 - e. Between 50 and 100 members = 152 clubs
 - f. Between 100 and 200 members = 92 clubs
 - g. > 200 members = 22 clubs
11. The average club size is 71 members. Excluding social members, the average club size is 51 full playing members.

12. Of the 77,399 casual participation numbers:
 - a. 82 clubs had no casual participation programmes or events
 - b. 231 clubs had less than 100 casual participants per annum
 - c. 154 clubs had between 100 and 500 casual participants
 - d. 11 clubs had between 500 and 1000 casual participants
 - e. 12 clubs had casual participation greater than 1000.

Club Programmes and Use

13. Only 256 clubs (51%) run a business house/twilight competition on a weeknight.
14. 308 clubs (62%) run corporate/casual hire functions.
15. 76 clubs (15%) are not available for any form of casual participation hire.
16. Minimal number (<1%) of clubs are open for 'turn, up and play' casual hire.
17. 153 (31%) of our bowling clubs are used by other sports clubs; whilst 327 clubs (66%) have their facilities used by other community groups.
18. Some form of indoor bowls (small bowls) is offered by 105 (21%) of our bowling clubs.
19. Youth programmes are offered in only 50 (10%) of our bowling clubs.
20. Almost all clubs (97%) run a club championship and/or open tournaments. 27 clubs (5%) run an Elite or Premier prizemoney tournament.

Governance Matters

21. 461 (93%) of our clubs are incorporated with the Incorporated Societies register up to date.
22. However only 365 clubs (73%) are registered with the Inland revenue for GST.
23. Bowls NZ administer a club check grading
 - a. 49 clubs (10%) have a Gold rating
 - b. 19 clubs have a Silver rating
 - c. 20 clubs have a Bronze rating
 - d. 409 clubs (82%) have no club check rating
24. 362 (73%) of our bowling clubs have a Health & Safety plan. However only 274 (55%) discuss this within their committee meetings. Interestingly 214 (43%) of our bowling clubs have a Defibrillator.
25. 239 (47%) of our bowling clubs have the latest (2013 template) aligned constitution.

Operational Matters

26. Only 21 clubs have a paid manager, with a salary exceeding \$20,000. Six of these clubs have a paid manager with a salary of \$50,000 or more.
27. 448 clubs (89%) have no paid club management role.
28. 218 clubs (46%) of clubs pay their greenkeeper some form of compensation. Of these 218 clubs, 110 clubs paid between \$1000 and \$10,000; 98 clubs between \$10,000 and \$30,000; with 20 clubs paying more than \$30,000 for greenkeeping services.
29. Whilst all clubs reported having a database of membership, primarily in spreadsheet or word format; only 134 clubs reported having a database of the casual participation (77,399).
30. The primary form of communication for clubs was email (84%), post (53%), website (40%), Facebook (36%) and Text (29%).

Club Facilities (excluding greens)

31. 425 clubs (85%) owned their own clubrooms; with another 75 clubs having rights in partnership with another entity, including leases with the local council.
32. 188 clubs (38%) own their own land, whilst 243 clubs (49%) have a lease with the local council. The balance are partnership agreements with the likes of RSA's and other sporting entities.
33. 296 clubs (approximately 60%) have club buildings over 50 years of age. Only 33 clubs (7%) have club buildings less than 20 years.
34. When reflecting on the presentation/quality of the clubrooms: 24 (5%) were considered modern; 109 (22%) were considered very good; 308 (62%) were considered average and 52 (10%) were considered of poor quality and presentation.
35. 33% of bowling clubs had what might be considered modern or very good car parking facilities. 44% were average and 23% were considered to have had poor car parking facilities available to customers.
36. Only 107 clubs (21%) were considered to have modern or very good street appeal; with 165 of the clubs (33%) considered to have poor street appeal. This is reflected also in the evaluation of club street signage with only 76 clubs (15%) considered to have modern or very good street signage. Again 130 clubs (26%) had what was considered poor street signage promoting their bowling club.

Club Greens

37. The total number of greens was 768; of which 595 greens (77%) were 'natural' and 173 greens (23%) were artificial or carpet.
38. Of our 500 bowling clubs: 283 clubs (57%) have one green; 171 clubs (34%) have two greens and 46 clubs (9%) have three or more greens.
39. The most popular type of natural surface was maniototo (41%) followed by diaoica (32%), starweed (17%) and mixed weed (11%).
40. The most popular artificial surface was installed by Tigerturf (63%), then Astroturf (16%), Greenguage (13%) and Dales (11%).

Financial Information

41. The average gross turnover of a bowling club was approximately \$70,000, making the total club turnover approximately \$35 million. Of the 454 clubs (out of 500) that supplied financial data:
 - a. 96 clubs (21%) had a gross turnover of less than \$20,000;
 - b. A further 136 clubs (30%) had a turnover between \$20,000 and \$50,000;
 - c. 115 clubs (25%) were between \$50,000 and \$100,000;
 - d. 103 clubs (23%) were between \$100,000 and \$300,000; and
 - e. 4 clubs had a turnover exceeding \$300,000
42. Bar Income on average contributes 45% of over club turnover; whilst membership income only accounts for 12 % of income. The percentage generated from sponsorship and grants on average is 14%; with the balance (31%) from other activities; including casual participation.
43. The average salary and wages bill for a bowling club was \$10,743. The average depreciation for a club was \$7,790.
44. The average club membership fee was \$141.66; with 120 clubs (30%) having an annual fee of less than \$100. 49 clubs had an annual membership fee of more than \$200.

45. 170 clubs (37%) have cash reserves of \$20,000 or less. 189 clubs (41%) have reserves between \$20,000 and \$100,000. A further 97 clubs (21%) have reserves between \$100,000 and \$1 million. 4 clubs have reserves in excess of \$1 million.
46. 86 clubs have land or buildings over \$1 million in value on their Balance Sheet
47. Of the 293 clubs that responded: 48% have their accounts audited, with 46% having them reviewed. 6% were neither audited or reviewed.
48. The types of insurance policies held by clubs are as follows:
 - a. Building Insurance: 94% of clubs have cover
 - b. Contents Insurance: 95% of clubs have cover
 - c. Greens Insurance: 53% of clubs have cover
 - d. General or Public Liability Insurance: 88% of clubs have cover
 - e. Directors and Officers Insurance: 13 % of clubs have cover.
49. 34 bowling clubs still have gaming machines.
50. During the Census there were four photographs taken at each club, showing the club from inside and outside the facility. These photos are available from Bowls NZ upon request.

ENDS.