



# WORLD BOWLS REVIEW - "AT THE CROSSROADS"

FINAL REPORT - KEY FINDINGS AND RECOMMENDATIONS  
December 2021



# INTRODUCTION AND CONTENTS



In September 2021, World Bowls (WB) commissioned an external review of its governance, management and operations. The overall aim of the review is to ensure the organisation is structured in line with best practice and positioned to achieve its future goals. The Board appointed experienced management consultancy firm, SBP Advisory, to assist with this process.

The review consisted of five key stages and involved an extensive consultation process to ensure that all Member National Authorities (MNA's) were given the opportunity to be involved in shaping the future direction of the organisation. This included the following:

- All relevant World Bowls background documents, policies, strategies, studies and financial statements.
- An independent analysis of the recent MNA survey findings from both the 2020 General Survey and the 2020 Pandemic Survey.
- Secondary data and reports from organisations such as, but not limited to, the Association of Summer Olympic International Federations, which has recently completed a thorough governance benchmarking exercise with 33 international sporting federations.
- Thorough benchmarking of leading international sporting federations. We have established priorities sports and organisations that include with the PSC but would anticipate a mix of Netball, Badminton, Lacrosse, Swimming, Rugby Sevens, Sport Climbing and Tennis as a starting point.
- Online survey completed by all Board members, online survey with Member National Authorities (MNA's) which received submissions from 37 MNA's,
- In-depth interviews (on-line) with 17 stakeholders/MNA CEOs and Office Bearers.

This report provides the key findings and recommendations from the review – including all relevant appendices, surveys and analysis.

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## **SECTION ONE: SETTING THE SCENE**

**PROJECT VISION AND OBJECTIVES  
OVERVIEW OF THE METHODOLOGY  
THE SENTIMENT FOR CHANGE**

## Project Vision

*Ensure the governance, management and operations of World Bowls are aligned with the best practice for international sporting federations and its future goal.*

## Project Objectives

**The specific objectives include a detailed evaluation of:**

- The strengths and weaknesses of the current governance and administrative structures and systems;
- The strengths and weaknesses of organisational and operational performance;
- Global best practice and benchmarks – and comparisons with similar sized organisations;
- Key issues, gaps and improvements required to meet the project vision.

# PROJECT OBJECTIVES AND KEY FOCUS AREAS



Task	Objective	Process and Key Focus Areas
<b>Current Situation Analysis</b>	<p>A comprehensive analysis of the current internal and external environment of World Bowls, including the benchmarking of structure, resourcing and performance against other leading organisations.</p>	<ul style="list-style-type: none"> <li>• Internal                             <ul style="list-style-type: none"> <li>• Governance</li> <li>• Vision and Strategy</li> <li>• Leadership and Management</li> <li>• Operations and Resourcing</li> </ul> </li> <li>• External                             <ul style="list-style-type: none"> <li>• Industry Trends and Innovations</li> <li>• Disruptive Forces</li> <li>• Best Practice Case Studies and Benchmarking</li> </ul> </li> </ul>
<b>Critical Issue Diagnosis</b>	<p>The identification of five to six critical issues which impact on service delivery, clearly defining the 'problem statements' which need to be solved.</p>	<ul style="list-style-type: none"> <li>• Internal Strengths and Weaknesses</li> <li>• External Trends, Forces, Opportunities and Threats</li> <li>• Five to six critical issues encompassing all SWOT factors</li> <li>• Existing risk management, tolerance and appetite</li> </ul>
<b>Critical Issue Validation and Solution Development</b>	<p>Validate the root cause of the critical issues. Using the data and insights gained through research and stakeholder consultation processes to commence the development of solutions.</p>	<ul style="list-style-type: none"> <li>• Research Findings and Insights</li> <li>• Stakeholder Engagement</li> <li>• Market analysis and assessments</li> <li>• Forecasting and Scenario Modelling</li> <li>• Brainstorming, reviewing, refining and testing</li> </ul>
<b>Recommendations</b>	<p>Strong, clear and pragmatic recommendations which are achievable within realistic timeframes and budgetary constraints.</p>	<ul style="list-style-type: none"> <li>• Finalising and presenting with clear rationale</li> <li>• Strategies</li> <li>• Actions</li> <li>• Timeframes</li> <li>• Resourcing and implementation</li> </ul>

# OVERVIEW OF THE METHODOLOGY



1. Scoping & Project Management	2. Due Diligence & Benchmarking	3. Stakeholder Consultation	4. Interim Report, Recommendations & Options	5. Final Report, Strategy & Implementation Roadmap
<ul style="list-style-type: none"> <li>Meet with key management/Board to develop specific <b>roles, responsibilities, dates and timeframes</b>.</li> <li><b>Conduct staff/Board consultations</b> to handover any key background information.</li> <li>Establish a <b>Project Steering Committee</b> (PSC) – notionally this is the Board</li> <li>Develop a <b>shared vision and decision-making criteria for the project</b>.</li> <li>Document overall project plan, outlining the methodology, research, <b>stakeholder communication and consultation plan</b>.</li> </ul>	<ul style="list-style-type: none"> <li>Detailed independent review/audit of:                             <ul style="list-style-type: none"> <li>Current <b>operating policies, processes, roles and responsibilities, and terms of reference</b>.</li> <li>Organisation standards framework incorporating <b>culture, behaviours, decision-making and accountability</b>.</li> <li><b>Financial</b> break downs of each business unit, specifically focusing on revenue uplift and re-investment options from <b>events, marketing communications, commercial, finance and bowls development</b>.</li> <li><b>Research industry case studies, global benchmarking</b> and document key learnings for Bowls.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Establish <b>an online presence/portal</b> for member organisation updates and information.</li> <li><b>World Bowls and MNA organisation staff/board survey</b> circulated and completed, with analysis and presentation of results.</li> <li><b>Complete up to 15 online depth interviews/strategic consultations</b> with national member organisation Directors, staff, clubs and other key representatives. Note: 17 interviews were completed.</li> <li>The <b>key themes, issues and underlying constraints</b> will be identified and documented.</li> <li><b>Future options</b> identified for further consideration and development.</li> </ul>	<ul style="list-style-type: none"> <li>Facilitate up some workshops with the PSC and nominated stakeholders to discuss and review findings</li> <li>Develop/refine <b>interim structural, strategic and operational</b> insights, implications and recommendations for consideration by the PSC.</li> <li>Independently assess and advise <b>performance projections for the future of World Bowls</b>, and potential impact of additional resources (i.e., marketing, event commercialisation, development support).</li> <li><b>Commercial and income uplift analysis of revenue opportunities</b> for each of the potential future models – and across operational improvements.</li> </ul>	<ul style="list-style-type: none"> <li><b>Provide clear, independent and detailed recommendations.</b></li> <li>Develop a strategic roadmap and <b>implementation plan for the next phase</b> of growth and innovation for World Bowls, which can be used for monitoring and reviewing progress.</li> <li>Clarity and direction on specific roles and responsibilities.</li> <li>Develop and provide communication materials, project summaries and presentations for a series of information dissemination forums inform members of any future changes to World Bowls</li> <li>Provide <b>ongoing support</b> through advice, mentoring and problem solving.</li> </ul>

Throughout this process, we have taken the view that **the game, its brand and profile must grow for World Bowls to be around for the next 50 or 100 years.**

**The organisation cannot sit still**, nor can it continue to operate in the same way into the future.

This statement is not about the previous hard work by many (including past office bearers) in getting the organisation to the point of where it is now, it is simply about its future. The sentiments from members (MNAs), staff, board, volunteers and others is that...

There must be **pragmatic outcomes** from this review. **Change is a must** – as there have been too many reviews done over the journey with little (perceived) change or elevation of organisational performance.

Revenues will unlock the ability to invest in more people with right skill sets to help grow the sport. **Paralympic and the Olympic recognition** – while this is a stretch to think about for some, in the short/medium term we recommend that you pursue this opportunity vigorously!

Lastly, **the game needs a global event that is fast/fun and full of energy** to break open the commercial revenue opportunities that will provide the best chance for organisational success - and long-term survival.

In reality, **some will argue that World Bowls has an identity issue** – it needs to portray its global voice, have new revenue streams, deal with integrity issues of the game – and share its knowledge and resources using modern and up to date technology.

The following are words directly used by others through this process...

***“I think the game is at a crossroads for its future.”***

***“Are we on a burning platform - or is it simply too late?”***

***“Sport as an industry is about innovation – if you are not innovating, you are dying.”***

Some will say that these are over-dramatic comments, but they highlight the need for change...the game needs to ‘Stay in Play’.



# SOME VERBATIM COMMENTS

***“We want this sport to take off – it has to be more open, accessible, inclusive and engaged with its local community. The traditional staple of the game is in steady decline. It needs to be much more inclusive than it is now. It is simply too traditional.”***

***“We need to develop our heroes and names – we need both of our male and female stars recognised on the world stage. We need an event that brings these stars together with some emerging nations to play the game in a new way. This is not about the way our (current) Worlds are played but a new event that captures the hearts and minds of new and future players and fans.”***

***“The recent Commonwealth Games shudder is not surprising – we have been staring down the barrel and we need to make real changes (not just cosmetic ones). The biggest issue that we have got is to convince our member nations that we need to change things – the problem is they always want things for nothing and they operate that way – with little thought for the growth and the future of the sport. No one has ever won the battle to truly change the sport but the time is now. We are running out of options.”***

***“Why can’t we take the notion or idea that all bowls is bowls...no matter what form, game, rules or format. We are at the cross roads – our own bias is all wrong – it is all bowls.”***

***“This sport is in need of a shake up. We need to modernise the sport. We have lost a generation of bowlers – you just need to look at the numbers and the lack of coverage we get.”***

***“We talk about how inclusive the game is but what have we really done to bring the many world bodies together?”***

***“It is about positioning – it is all about story telling – the game needs to be quicker and shorter. We need to start a revolution, big bold packed events that drive visibility in the sport and really inspire people to play. We need a World Cup or BPL style of game that has a strong sense of brand and build rivalries and role models and ambassadors.”***

***“The Olympics? I don’t want to be a defeatist, but even our Comm Games position is under threat. It’s really unfathomable how few nations really play our game. How small our footprint is and how small our TV and social media footprint is. The Para Bowls has a chance – and we need to think about where we can play this great game in the future.”***

***“The overall attitude at World Bowls is we can’t do that...it is NO. It is not about how can we challenge it or change it. It can be professionally annoying. Professionally the past 18 months have been really disappointing (through COVID). It was a time for sport and sport leaders to step up. Too many times at World Bowls it has been no – or it is just too hard. This period was such a loss – and I also recognize that I need to be a leader too – and so should World Bowls. I am so disappointed and angry about the way the Commonwealth Games has unfolded – and our position in the Games is in jeopardy. We should all be stepping up – is there anything we can do to help? Are we considering alternatives formats? It seems to be always NO, NO, NO. I just don’t know where we are at, as a sport globally.”***

## **SECTION TWO: BEST PRACTICE**

## SPORT AUSTRALIA – 9 SPORTS GOVERNANCE PRINCIPLES

*These principles align to global best practice. The Board is ultimately responsible for the success of an organisation – these principles (or ones like these), should direct the future of the sport at a Global and MNA level...*

1

### The spirit of the game:

**Values** - driven culture and behaviours

Organisation's culture and behaviours should be underpinned by values demonstrated by the board and embedded in its decisions and actions.

2

### The team:

Aligned sport through **collaborative** governance

Boards should work together to govern collaboratively and create alignment to maximise efficient use of resources and implement whole-of-sport plans.

3

### The game plan:

A clear **vision** that informs strategy

The board is responsible for overseeing the development of the organisation's vision and strategy as well as determining what success looks like.

4

### The players:

A **diverse** board to enable considered decision-making

Boards should be a diverse group who collectively, provide different perspectives and experience to facilitate more considered decision-making.

5

### The rulebook:

Documents that outline duties, powers, **roles and responsibilities**

Organisation should clearly define and document its structure and the duties, responsibilities and powers of members, directors, committees and management.

6

### The playbook:

Board processes which ensure **accountability** and transparency

Boards are able to show accountability and transparency to its members and stakeholders through effective processes and continual reviews of its performance.

7

### The defense:

A system which protects the organisation

To proactively protect the organisation from harm, the board ensures the organisation has and maintains robust processes for **managing risk**.

8

### The best and fairest:

A system for ensuring integrity

An organisation should have measures and protocols to ensure **integrity** of the sport and the safeguarding of its participants.

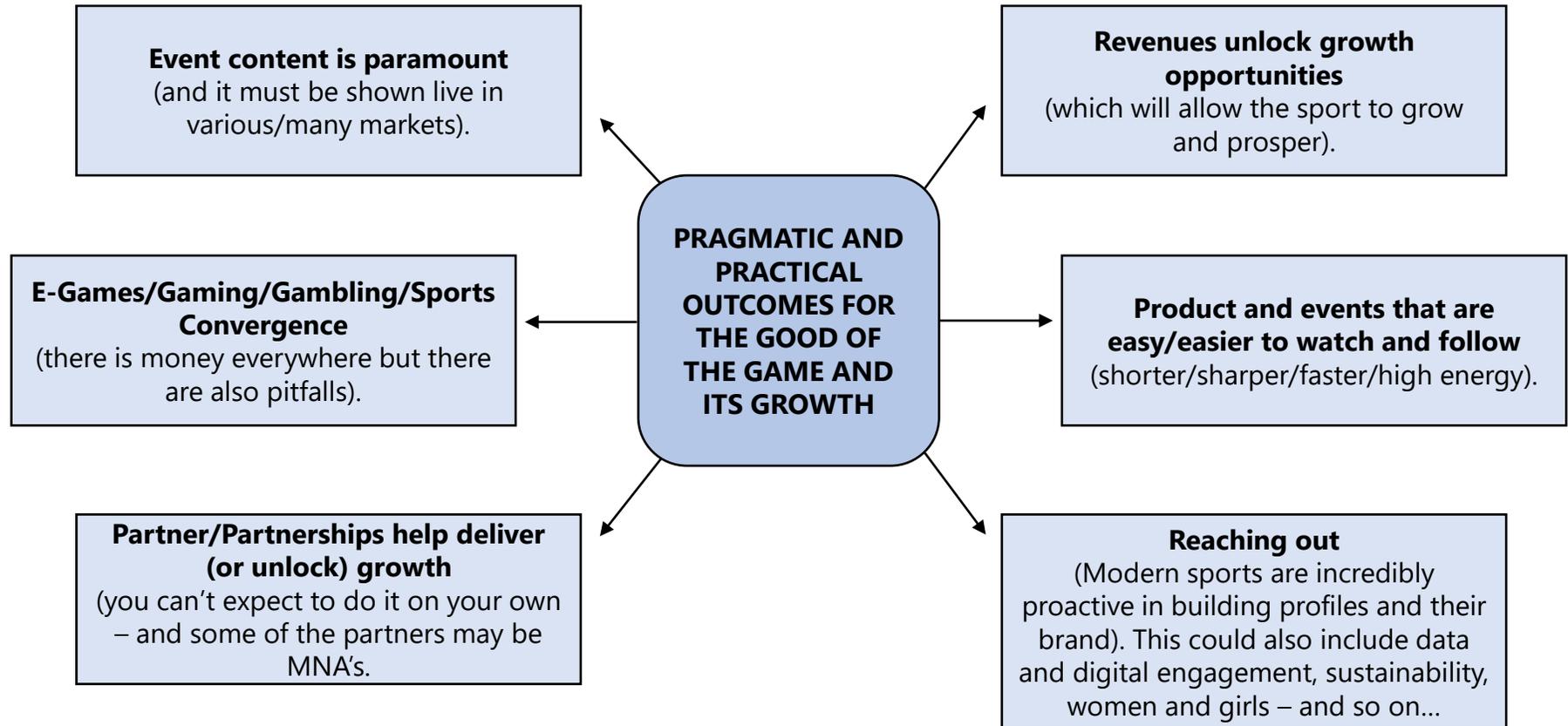
9

### The scoreboard:

Embedded systems of internal reviews to foster continuous improvement

The board must have an appropriate system of internal controls to enable it to **monitor performance**, track progress against strategy and address concerns.

Some of the broader trends in the sports industry impacting the work of International Federations could be summed up as follows but World Bowls will need a pragmatic road-map for the next 2-3 years...



# KEY BENCHMARK FINDINGS: A BURNING PLATFORM...



High-level World Bowls Performance Assessment	Industry trends and best practice	Innovation and Leadership
<ul style="list-style-type: none"> <li>World Bowls is a <b>relatively small international sporting federation</b> in terms of size, staff and turnover when compared to global benchmarks.</li> <li>There has been a <b>20-year period of significant and consistent decline</b> in the number of clubs (14% decline) and members/participants (38% decline) which are recorded by the Member National Associations (MNAs).</li> <li>There has been <b>small growth in the number of MNAs which are members of World Bowls, and also some small growth in clubs and participants in the Asian region</b> – but this positive does not offset the global downward trajectory of the sport over a long period.</li> </ul>	<ul style="list-style-type: none"> <li><b>Globally, sports federations are forecasting overall annual growth of 4.3%</b> in terms of size, staff and turnover over the next three to five years.</li> <li>The <b>top-two market forces which are predicted to have the most influence on the global sports industry are the transforming media landscape and sports ability to influence positive social change.</b></li> <li><b>Good governance is of the highest importance</b> to global sporting industry associations such as the International Olympic Committee (IOC), Commonwealth Games and The General Association of International Sports Federations (GAISF). GAISF conducts regular benchmarking research into the good governance practices of its member International Federations covering 20 detailed indicators across three broad sections: <i>Transparency, Integrity and Democracy, Development and Control mechanisms.</i></li> </ul>	<ul style="list-style-type: none"> <li><b>Becoming recognised and included in major international games is going to be more competitive</b> among International Sporting Federations.</li> <li>Both the IOC and Commonwealth Games organisations have provided clear signals to the industry that change is on the horizon. <b>The sports which will be showcased at these events in the future will be innovative, sustainable, socially and culturally relevant and have a significant youth audience.</b></li> <li>This theme also includes leadership on <b>gender, diversity and across generations.</b></li> <li><b>Many international federations are ahead of the curve and have implemented new products</b>, specifically tailored to these parameters. <i>Box Lacrosse, Rugby Sevens, T20 cricket and 3x3 Basketball are just a few examples.</i></li> </ul>

*While we can debate many things in this review (yes there are varied opinions!), the reality is that most, if not all, want to see the game grow and prosper - and in framing our work we will often use the values to test how well the organisation is performing.*

## The following core values are part of the WB framework...

	<b>Global Leadership</b>	World Bowls will lead the sport of Bowls and ensure its Member National Authorities are represented in a global capacity.
	<b>Integrity</b>	World Bowls will govern the sport and represent Member National Authorities with respect for all concerned.
	<b>Collaboration</b>	World Bowls will proactively seek out and listen to Member National Authorities' and other key stakeholders' opinions and openly encourage the sharing of best practices.
	<b>Continuous Improvement and Innovation</b>	World Bowls will aim to continuously develop and encourage growth and change for the advancement of the sport.

# **SECTION THREE: KEY FINDINGS AND THEMES**

**GOVERNANCE  
OPERATIONS**

**GAME EXPANSION AND DEVELOPMENT  
COMMERCIAL AND EVENTS**

## **KEY FINDINGS – GOVERNANCE**

KEY AREA	MAIN OBSERVATIONS	STRATEGIC THEMES
<p><b>Purpose/Vision/Strategy must be highly visible</b></p>	<p>While there is a strategic plan in place for World Bowls, it has rarely been raised through this review as a guiding plan or document that is relied upon.</p> <p>It should be at the forefront of the Board’s work and mindset – and then it becomes a plan for everyone to follow including the staff and key partners to work from.</p> <p>The new strategy document should be driving the Board and Staff in all decisions.</p>	<p>Most importantly, in our view, a strong purpose, vision and strategy is required to ensure the Board, Staff and Volunteers have a guiding Strategy or Business Plan - but it must not be too overwhelming.</p>
<p><b>Governance Principles</b></p>	<p>Modern organisations follow modern governance principles – and while many global federations are criticized for their insular habits and outlook, the quality of governance in Global Sports Federations and entities is changing – and this has been at the forefront for many over recent years including World Rugby, FIFA, FIBA, World Netball etc.</p>	<p>Adoption of some modern governance principles by the Board would allow it to build on the need for change. The adoption of some principles will assist in annual reviews of performance and can become a “check point” to accelerate change and identify improvements.</p> <p>Most importantly, adopting modern governance principles will align direction and decision making.</p>
<p><b>Terms and Rotations</b></p>	<p>It became obvious early on that the terms and rotation sequence of board members does not provide the Board with an optimal transition or election process.</p> <p>It is feasible (and it happens) that all Board positions are turned over or spilled at the one time. This is not good practice nor good governance.</p>	<p>A review of the election and rotation policies is required – and should be aligned with any constitution/Articles of Association review.</p> <p>To match best practice, it is ideal if Board candidates have</p>

KEY AREA	MAIN OBSERVATIONS	STRATEGIC THEMES
<b>Gender balance</b>	While we acknowledge that the WB Board is aware of its lack of gender balance – there must be a concerted effort to find more females to become a part of the sports decisions makers – and there is no better place to start than with World Bowls.	A process of positive engagement with potential female Board members needs to be initiated - immediately.
<b>A future focus on a skills-based Board</b>	While we have not sought to review individual Board members and their skills through this process, there is some obvious initial gaps that we have identified including gaps around commercialisation of products and technology/media.	The board should include a skills audit post in its next AGM/Election phase.
<b>Independent Board members</b>	While the intent and ethics of all current Directors is unquestionable, there is a need to introduce some external views and thinking into the Board room.	We believe there is a need to introduce some independent board members prior to the next AGM/Annual meeting, through an agreed selection process.
<b>It's about following good process</b>	Good governance today is about continual governance improvement. While there have been some minor improvements in the Regional Director engagement, there is no doubt the constitution/Articles need an update.	Periodic reviews of the constitution are sensible and given the significant changes in the world today - and the acceleration of various technology and platforms, a review every two to three years would be sensible for the Board to adopt.
<b>IBD – and other bodies</b>	There is a direct willingness for the IBD to work with WB more directly - and this is happening. While some will see that there is work to go in bringing the two organisations together ,this should be a formal priority.	The Board needs to consider the next steps to bring the various Bowls organisations together – the first priority being IBD.

# THE ROLE OF THE WB BOARD – TO ADOPT



Functional	Strategic	Prudential	Cultural	Operational
<ul style="list-style-type: none"> <li>• Appointing (and if necessary, removing) the Chief Executive.</li> <li>• Regularly assessing the CEO performance via Chair and Executive.</li> <li>• Reviewing and approving the remuneration policy for the CEO and senior managers.</li> <li>• Approving the sub-committee structure and appointing (and if necessary, removing) sub-committee members.</li> <li>• Setting appropriate levels of delegation to the CEO and staff of duties and financial approval levels.</li> </ul>	<ul style="list-style-type: none"> <li>• Playing an active and leading role in the formulation of strategy.</li> <li>• Regularly reviewing the strategic direction and implementation of strategies.</li> <li>• Determining which matters should be reserved for only the Board to deal with.</li> <li>• Assessing the composition and size of the Board for approval by members.</li> </ul>	<ul style="list-style-type: none"> <li>• Ensuring the adequacy and efficacy of internal controls and reporting systems.</li> <li>• Ensuring appropriate processes are in place to identify, evaluate and manage business risk.</li> <li>• Ensuring a proper policy framework is in place and is consistently applied.</li> <li>• Maintaining a high-level overview of the processes in place for all relevant legal and regulatory requirements to be met and delegating day to day compliance responsibilities to the CEO.</li> </ul>	<ul style="list-style-type: none"> <li>• Setting and living the values of the organisation.</li> <li>• Assessing the ongoing performance of the Board and of individual Board and sub-committee members.</li> <li>• Ensuring the Board have access to ongoing training and, where appropriate, independent advice.</li> <li>• Setting standards for ethical behaviour, good governance, corporate responsibility and sustainability.</li> <li>• Promoting the aims, objectives and culture of the sport in the community.</li> </ul>	<ul style="list-style-type: none"> <li>• Approving the execution of significant contracts.</li> <li>• Approving the annual budget.</li> <li>• Approving submissions for significant funding.</li> <li>• Reviewing progress towards strategic direction and implementation of strategies.</li> <li>• Monitoring financial performance – covering current and long-term commitments and revenue trends.</li> <li>• Approving major capital expenditure.</li> </ul>

## **KEY FINDINGS – OPERATIONS**

KEY AREA	MAIN OBSERVATIONS	STRATEGIC THEMES
<p><b>Events, Rules and Regulations are a Strength</b></p>	<p>There is no doubt that the WB team delivers quality events - the rules and regulations oversight and interaction with hosting MNA's is done well.</p> <p>The next phase for the organisation is to identify a new product that will have a direct impact on revenues, growth and coverage.</p>	<p>In the short-term, we do not anticipate recommending any real changes here – as this part of the WB operations is done to a solid standard.</p> <p>The question everyone asks is – where is the new product that will inspire the next generation?</p>
<p><b>Outward Facing/Looking</b></p>	<p>MNA's are expecting more from its World body – this was reinforced time and time again.</p> <p>While the pandemic has allowed the WB team to review its events in addition to researching the impacts of COVID with MNA's, if there are criticisms of the organisation, it can be directed towards 'that there has been too much via email'.</p> <p>The point to be made is that there needs to be more personalised contact from WB HQ with the MNA's – and we do recognise that with the Olympics/Paralympics project in the mix, this will provide the opportunity to have direct interaction with the MNA's</p>	<p>There is a great opportunity to initiate an Annual Global Bowls Conference.</p> <p>There is a need and desire for MNA's to directly share case studies, resources and best practice in clubs, coaching, products and officiating.</p> <p>This should be a WB priority – and it may energise the role of the WB Council.</p>
<p><b>Size and Scale</b></p>	<p>The hard cold reality of the WB organisation is that while the number of member MNA's has grown over a 20 year period (and expectations are increasing for more services and resources for MNA's) - there must be a goal to grow the organisation (in terms of revenues and people).</p>	<p>A new product/event will help unlock this.</p>

KEY AREA	MAIN OBSERVATIONS	STRATEGIC THEMES
<p><b>Website</b></p>	<p>There is some quality content on the website but there is a need to upgrade and re-fresh its 'look and feel'.</p> <p>While we are not recommending a re-brand at this stage, we believe the website could be much more dynamic and become a resource for sharing best practices from across the globe (covering the previously mentioned club's, products, coaching and officiating)</p>	<p>Outsource (contract) the function of the website to a larger MNA – this is simply to ease the burden on WB resources and to assist in a quick re-fresh and re-launch.</p>
<p><b>Marketing/Communications</b></p>	<p>This is perhaps aligned to the above website commentary – and much of it is about the context of being more outward focussed.</p> <p>Marketing the game is complex and all consuming and there should be consideration that much of this function should be fully outsourced at some point in the future – if it cannot be completed by an internal resource.</p>	<p>As above – but complete the website upgrade as a first priority.</p> <p>As an aside, there are a number of ambassadors (current players) who could start to become part of the social media push for the game.</p> <p>While we like the idea of a global World Bowls Marketing Committee, there must be a focus on clear purpose and outcomes of this group,</p>
<p><b>Succession Planning</b></p>	<p>With the planned retirement of the CEO on the horizon (later half of 2024), now is the time for the Board to commence a succession plan – and identify the skills and experience a new CEO will need to possess, that will lead the game into 2032 and beyond.</p>	<p>Establish a small working group from the Board to commence this process, as soon as practical.</p>

## **KEY FINDINGS – GAME EXPANSION AND DEVELOPMENT**

KEY AREA	MAIN OBSERVATIONS	STRATEGIC THEMES
<p><b>MNA needs do vary but..</b></p>	<p>There is no doubt that the specific needs of MNA's do vary – and it is well documented that the big 5 or 6 can dominate discussions and proceedings. However, they also have much to offer in terms of products, services, clubs, coaching, officiating and the like...</p> <p>They can – and are willing to help some of the smaller MNA's in their journey.</p>	<p>The establishment of a formal MNA buddy program where the larger (5-6) MNA's formally work on a partnership with two or three small MNA's in their region, to assist the development of the game with some smaller/growing nations.</p> <p>We also need to recognise that the regional Directors may have a role to play in this as well – but the larger MNA's have all of the resources at their finger tips.</p>
<p><b>Equipment Needs</b></p>	<p>This is something that many of the smaller nations raised – and which may be difficult to do but there are many sets of bowls that are discarded every year – and with recycling, re-use and climate issues in the news every-day, there is an opportunity for some MNA's to recycle 'used equipment' to MNA's in need.</p>	<p>While a little left field, a re-cycling/re-use equipment program, with the larger MNA's, should be explored further for it's practicality.</p>
<p><b>Growth Regions?</b></p>	<p>Some of the discussion through this project inevitably turned towards growth – and while there is some debatable points, the reality is that there is an opportunity to grow the game through parts of Asia, The sub-continent, The Amercia's – and through Europe.</p> <p>Given the lack of resources of HQ to invest in this – this should be a collective strategic project for the Board and some MNA's.</p>	<p>In alignment with the Buddy system above – where are the next MNA member nations coming from? Can the CEOs and some of the regional Directors come up with a working list? Where does this intelligence sit?</p> <p>This work should be aligned with the Olympics/Paralympics project and its working group.</p>

KEY AREA	MAIN OBSERVATIONS	STRATEGIC THEMES
<p><b>The Olympics and Paralympics?</b></p>	<p>While not everyone is in favour of the Games stretch – this will provide a Vision, energy and a focus for the game to grow.</p> <p>It will also assist some MNA's to access funding and become formally recognised as well.</p> <p>A great outcome would be inclusion in the 2032 Paralympics – and an outstanding outcome would be inclusion in the 2032 Olympics.</p>	<p>We would recommend that it is full steam ahead with the business plan and working group.</p> <p>The product/game formats will be the key.</p>
<p><b>Annual Calendar/Development Strategy</b></p>	<p>While there is an Annual 2022 WB Calendar, we believe that a holistic calendar that includes major regional events would be useful for some MNA's in their own planning. While not a strategic imperative, this is something that could assist in aligning all major global events whether in Hong Kong, Malaysia, Africa, Canada or the America's</p> <p>The current development strategy will need to be reviewed and align with the new WB strategy – and the Olympic/Paralympic project work.</p>	<p>Review of the current Development strategy to align with the Olympic and Paralympic aspirations.</p>
<p><b>The HQ Office?</b></p>	<p>This is perhaps the most highly contentious issue – and one that elicits plenty of diverse views.</p> <p>In our view, this simply is a commercial decision... Whatever the decision, it must be a commercial one – where are the Rivers of Gold (money)? Which country will put up some investment? Where does it best open up some commercial opportunities? Which government will invest in a HQ? Will it allow us to increase our personnel to service our members?</p>	<p>Our view would be to put out a formal EOI process and this would include a World HP and Development Centre – to really place the sport on the map.</p>

## **KEY FINDINGS – COMMERCIAL AND EVENTS**

KEY AREA	MAIN OBSERVATIONS	STRATEGIC THEMES
<p><b>A new product and event that has commercial appeal – and still has game integrity.</b></p>	<p>Many involved in the game (and those still involved at club level) are often very resistant to change the game – and to ensure it remains relevant to tomorrow’s player, member and audience.</p> <p>This review is not about changing the World Championships or the Champion of Champions. However, throughout this review many at the forefront of the sport say that the game must change.</p> <p>And while we need to recognise that Australia and New Zealand are very different from many other MNA’s in how they work and operate, they have both had commercial and broadcast success with their ‘new’ products.</p> <p>No matter what – a new global and commercial product is a must for the game.</p>	<p>On the pages to follow a snap shot of the BPL and 3Five products are presented (as well as a recent trial in Wales). The new format should be somewhere between a 30-75 minute product – that is built for TV and has increased energy and vibrancy. The recent Olympics has shown that short, sharp and dynamic products are gaining ground as Para/Olympic sports.</p> <p>We believe that the alignment of the Olympics/Paralympics project - and the new commercial TV product must be all matched.</p> <p>The game does not have the time, nor energy to develop more than one new product but it must reach a new audience and open up commercial avenues.</p>
<p><b>A new game for a new audience</b></p>	<p>It has to be stated that this/any new product is targeted at tomorrow’s new bowler, tomorrow’s new fan, tomorrow’s new club member – not today’s.</p> <ul style="list-style-type: none"> <li>- It might include 5-6 automatically qualified nations plus one from each region</li> <li>- 3-4 team members</li> <li>- Time format no more than 75 minutes (could be as short as 30)</li> <li>- Has the ability to include disability/para formats in the future</li> </ul>	<p>Just like T20, or the new lacrosse leagues, which opened broadcast opportunities, revenues and team ownership, this new product must be very different to the traditional product/game formats.</p>



## Format of Play

### Team Composition

Three Players and a Coach.

### Pairs Play

Pairs play only with each player to bowl three bowls and end. All three players will play two bowls in a tie-break.

### Sets Scoring

Each match comprises of two sets with each set being a maximum of five ends.

A set will be decided if at any point it becomes impossible for one team to draw or win the set. Should the shots be equal at the end of the fifth end, the set will be tied with each team earning half a point.

If both teams are equal on sets after the second set, a one end tiebreaker will be played.

### Game Timing

Shot clock present to ensure games finish on schedule.

## Optional Game Format Changes

*Game format changes and implementing will be discussed with the relevant broadcaster prior to the event with the format of play subject to change.*

### Player Rotation- Substitute

Coaches have unlimited rotations. All players must deliver 9 bowls during the match.

Teams may call upon a substitute to play one or more shots in any end.

### Killing an End

Each team will have the opportunity to kill an end. However, a player must nominate that they are attempting to kill the end.

### Powerplay

Powerplay enables a team to double their shots in any nominated end.

One power play per set nominated by the coach.

Can be used at both ends.

## **BOWLS 3 FIVE**

### **Format of Play**

#### **Team Composition**

Three players per team. Minimum of one female and one male member.

#### **Boundary Threads**

The use of boundary threads is not applied in New Zealand.

#### **Sets Scoring**

Each match comprises of two sets with each set being a maximum of five ends.

A set will be decided if at any point it becomes impossible for one team to draw or win the set. Should the shots be equal at the end of the fifth end, the set will be tied with each team earning half a point.

If both teams are equal on sets after the second set, a one end tiebreaker will be played.

#### **Game Timing**

There is no shot clock.

### **Optional Game Format Changes**

#### **Substitutions**

No substitutes available.

#### **Killing an End**

No killing of ends available.

#### **Powerplay**

Powerplay enables a team to double their shots in any nominated end.

Teams will be allowed one Power Play end per game (not per set).

There are no Power Plays available for use in a tiebreak.

#### **Example Competition Format**

**First Rounds:** A minimum of eight entries/countries.

**Second Rounds:** Down to say 4 Nations.

**Grand Final:** Top 2 Nations



## The Idea

During the 2021 season, the Welsh Women decided not to hold their normal Welsh competitions, but instead to encourage players back to the bowling green, held some "Covid Competitions".

The organisers thought it would be a great time to introduce some new formats so that players could try, have some fun, but still have a competitive game of bowls. Players were also allowed to join up across counties rather than stay within their counties to encourage entries.

## Format of Play

Based on the exciting Australian formats, Aussie Pairs was introduced, comprising 2 sets with a one end tie break if tied at one set each. An adapted BPL type game was also held where participants played in pairs (as teams of 3) with third player playing a minimum of 5 ends out of a 10 end set. Two sets and a one end tie break if needed where all three players played. Players were asked to suggest a music play list and the final was live streamed final with commentary – all for the first time.

## Outcome

The feedback from players was great, they really enjoyed both competitions and lots of people were interested in explanations of the format of each. Some spectators were going back to their clubs to introduce these formats, especially the Aussie pairs. Players have also requested that these competitions be placed into the 2022 programme.

**SECTION FOUR:**  
**THE FINAL RECOMMENDATIONS**

# THE FINAL RECOMMENDATIONS



## Governance

1. As soon as practical, and in line with the next Annual Meeting/AGM, review and update the Constitution/Articles to ensure there is an 'even' distribution of terms, so that Directors do not all come up for re-election in the same year/date. This includes terms and rotation alignment.
2. Initiate a recruitment drive to appoint some additional appointed Directors to fill both skills and/or gender gap.
3. Complete a skills gap audit of the current board to inform future succession planning and recruitment.
4. Annually review the strategic plan and its progress with the CEO.
5. Follow a best practice framework for annual governance reviews (sample is provided in the report).
6. Continue to explore a merger/formal partnership with IBD (and other Bowls organisations) – and this includes the future allocation of a Board position on the WB Board.



## Operations

1. Initiate a succession plan for the current CEO.
2. Establish an annual world conference – focusing on coaching, development and growth. In some countries, this will require translation services.
3. Outsource (via a contract) the WB website and some marketing communications to one of the larger MNAs (call for expression of interest as soon as practical)
4. Develop a shared resources platform which highlights case studies of success and quality coaching, officiating resources.
5. Introduce World Bowls email protocols for all Directors, key volunteers and contractors.



## Game Expansion and Development

1. Establish a regional buddy system for the larger (top 5-6) MNAs to assist smaller developing countries.
2. In line with Recommendation 1, establish an equipment exchange or donation program with larger MNAs.
3. Review/Refresh/Realign the World event calendar that includes regional events.
4. Review the resourcing requirements for Regional Directors to ensure they can assist MNA development and growth.



## Commercial and Events

1. Set up a Working Party (of 6 MNA's CEOs) to develop a new shorter version of the game to sell to a commercial partner. (This may align with the Olympic/Paralympic group)
2. Through the first 12 months, develop the commercial strategy, which underpins the expansion of this new format into regional matches and products.
3. Align the above new product, with Olympic and Paralympic aspirations.
4. Conduct a review of World Championship hosting/sanction fees paid by MNA's and establish a new hosting fee policy.

## **SECTION FIVE:**

**SWOT**

**VISION AND PURPOSE  
STRATEGIC FRAMEWORK**

# SWOT ANALYSIS – OVERALL PROJECT SUMMARY



## Strengths

- Facilitation and organisation of events and competitions.
- Clear lines of communication to the MNA's with newsletters and minutes from Board meetings.
- Provides international competitions and opportunities to develop the sport internationally.
- Financial position has improved.
- Recent reduction of fees during the pandemic was seen favourably by MNA's.



## Weaknesses

- Lack of leadership and strategic direction.
- Limited support in growing the game within smaller MNA's.
- Poor branding and positioning of the game internationally.
- Lack of broadcast relationships, sponsorship, and commercial development.
- Need for more diversified revenue streams.



## Opportunities

- 2026 Commonwealth Games and 2032 Olympic Games.
- Increased interest in the sport through the Asian region.
- Technological trends and emergence of alternative forms of media.
- Ageing populations that are suited to bowls.
- Changing demographics and community preferences for non-contact sports



## Threats

- Increasingly time poor society
- The shift away from traditional membership offerings.
- The ongoing impact and uncertainty of COVID.
- Competition from other sports for members and participants.

## WB Vision (Options)

"Grow and showcase the game across the globe and celebrate our rich cultural diversity."

"World Bowls – connecting communities and countries across all generations through playing Bowls."

## Our Purpose is to...

Administer and oversee key World Championship events

Uphold the rules and integrity of the game

Establish a global product or competition that MNA's can host and deliver that drives WB revenues

Position the sport for inclusion in multi-sport events including but not limited to Commonwealth Games, Paralympic and Olympic Games

Grow the sport of Bowls – both indoor and lawn

## Some KPI's

- Increase the number of MNA's to reach Paralympic status and then (if feasible) pursue the required MNA numbers for Olympics qualification.
- Increase the number of non-bowls events for our members – includes holding an Annual World Bowls Conference.
- Increase WB revenue 2x over the next three years.
- Establish a baseline satisfaction level with MNA members – minimum target of 80% total satisfaction
- Increase all social and media channels by 200% in year one of this plan



Governance	Operations	Game Expansion and Development	Commercial and Events
<ul style="list-style-type: none"> <li>• Conduct a Constitution/Articles Review</li> <li>• Review and confirm Board roles and responsibilities.</li> <li>• Develop a Succession Plan for the CEO and all key Board positions.</li> <li>• Undertake a Board skills assessment and shift towards skills-based appointments</li> <li>• Over the medium term, ensure the Board has equal representations across genders (using the 40:40:20 principle).</li> </ul>	<ul style="list-style-type: none"> <li>• Establish an Annual Members conference including regional “pods”.</li> <li>• Outsource the website, social media and online platforms to a larger MNA.</li> <li>• Develop a shared resources portal/platform for all MNA’s.</li> <li>• Commit to a new Strategic Growth Framework.</li> </ul>	<ul style="list-style-type: none"> <li>• Establish a regional buddy system for the top 5-6 MNA’s to assist smaller/developing countries.</li> <li>• Develop an annual game development calendar.</li> <li>• Establish an equipment exchange program with larger MNA’s.</li> <li>• Conduct an annual review of progress towards Commonwealth Games and Olympic aspirations.</li> </ul>	<ul style="list-style-type: none"> <li>• Set up a Working Party to develop a new game and event product for commercial expansion/exploration with sports marketing companies.                             <ul style="list-style-type: none"> <li>• Broadcast and sponsorship rights must be included.</li> <li>• This may include regional/feeder events.</li> </ul> </li> <li>• Post the new product launch, develop a Commercial Strategy.</li> </ul>

**APPENDIX ONE:**  
**DUE DILIGENCE AND BENCHMARKING**

# KEY FINDINGS: A BURNING PLATFORM...

High-level World Bowls Performance Assessment	Industry trends and best practice	Innovation and Leadership
<ul style="list-style-type: none"> <li>World Bowls is a relatively <b>small international sporting federation</b> in terms of size, staff and turnover when compared to global benchmarks.</li> <li>There has been a <b>20-year period of significant and consistent decline</b> in the number of clubs (14% decline) and members/participants (38% decline) which are recorded by the Member National Associations (MNAs).</li> <li>There has been <b>small growth in the number of MNAs which are members of World Bowls, and also some small growth in clubs and participants in the Asian region</b> – but this positive does not offset the global downward trajectory of the sport over a long period.</li> </ul>	<ul style="list-style-type: none"> <li><b>Globally, sports federations are forecasting overall annual growth of 4.3%</b> in terms of size, staff and turnover over the next three to five years.</li> <li>The <b>top-two market forces which are predicted to have the most influence on the global sports industry are the transforming media landscape and sports ability to influence positive social change.</b></li> <li><b>Good governance is of the highest importance</b> to global sporting industry associations such as the International Olympic Committee (IOC), Commonwealth Games and The General Association of International Sports Federations (GAISF). GAISF conducts regular benchmarking research into the good governance practices of its member International Federations covering 20 detailed indicators across three broad sections: <i>Transparency, Integrity and Democracy, Development and Control mechanisms.</i></li> </ul>	<ul style="list-style-type: none"> <li><b>Becoming recognised and included in major international games is going to be more competitive</b> among International Sporting Federations.</li> <li>Both the IOC and Commonwealth Games organisations have provided clear signals to the industry that change is on the horizon. <b>The sports which will be showcased at these events in the future will be innovative, sustainable, socially and culturally relevant and have a significant youth audience.</b></li> <li><b>Many international federations are ahead of the curve and have implemented new products</b>, specifically tailored to these parameters. <i>Box Lacrosse, Rugby Sevens, T20 cricket and 3x3 Basketball are just a few examples.</i></li> </ul>

This report details the above findings with research, data, benchmarking and analysis. The report will be a supporting document for the final World Bowls Organisational Review Report.

# **20-YEAR MEMBERSHIP TRENDS**

# KEY FINDINGS – MEMBERSHIP SNAPSHOT



Americas	Clubs	Members
2002	382	21,854
2011	343	17,492
<b>2021</b>	<b>283</b>	<b>15,350</b>
20-year trend	-26%	-30%
2021 % female members		49%
2021 MNAs	5	

Europe	Clubs	Members
2002	3,972	295,840
2011	4,182	229,719
<b>2021</b>	<b>3,702</b>	<b>200,509</b>
20-year trend	-7%	-32%
2021 % female members		31%
2021 MNAs	22	

Asia	Clubs	Members
2002	89	5,403
2011	126	4,919
<b>2021</b>	<b>124</b>	<b>6,066</b>
20-year trend	39%	12%
2021 % female members		44%
2021 MNAs	17	

Africa	Clubs	Members
2002	725	38,421
2011	622	33,015
<b>2021</b>	<b>490</b>	<b>21,213</b>
20-year trend	-32%	-45%
2021 % female members		38%
2021 MNAs	10	

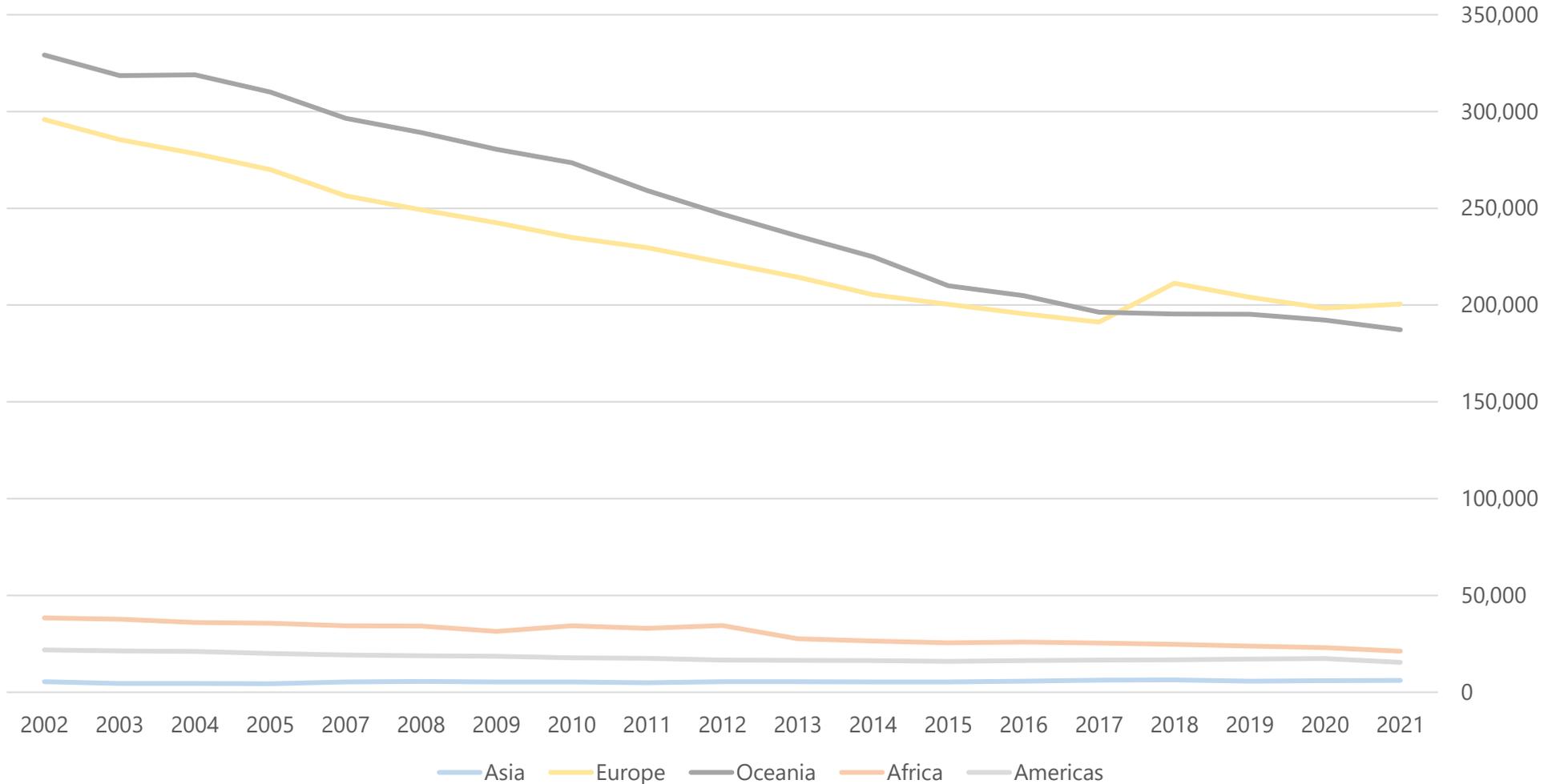
Oceania	Clubs	Members
2002	3,004	329,208
2011	2,648	259,275
<b>2021</b>	<b>2,335</b>	<b>187,283</b>
20-year trend	-22%	-43%
2021 % female members		32%
2021 MNAs	10	

# KEY FINDINGS – MEMBERSHIP TRENDS



Total decline of 260,305 members (38%)

All Members: 20 year regional trends

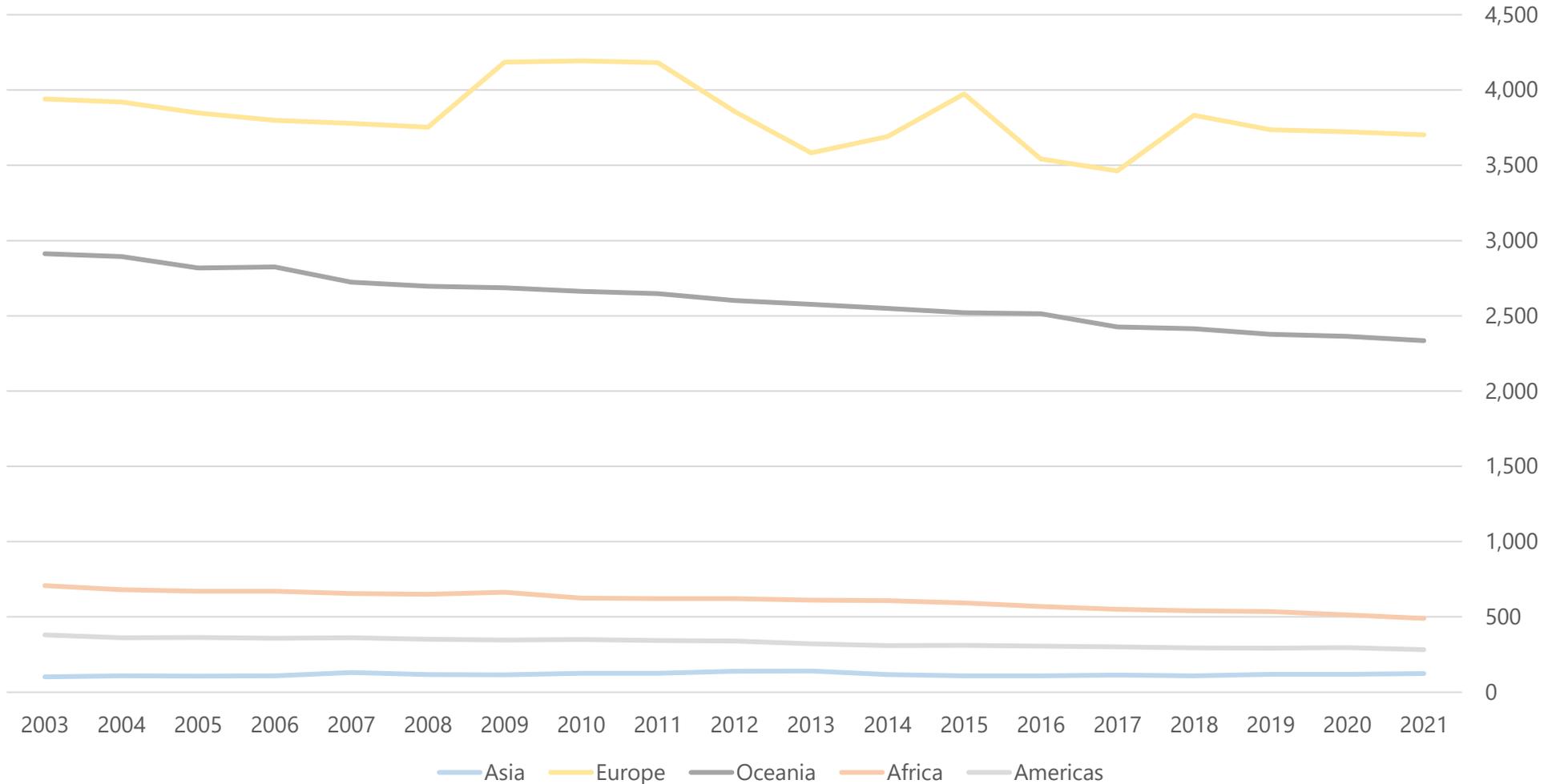


# KEY FINDINGS – MEMBERSHIP TRENDS



**Total decline of 1,108 clubs  
(14%)**

**Clubs: 20 year regional trends**

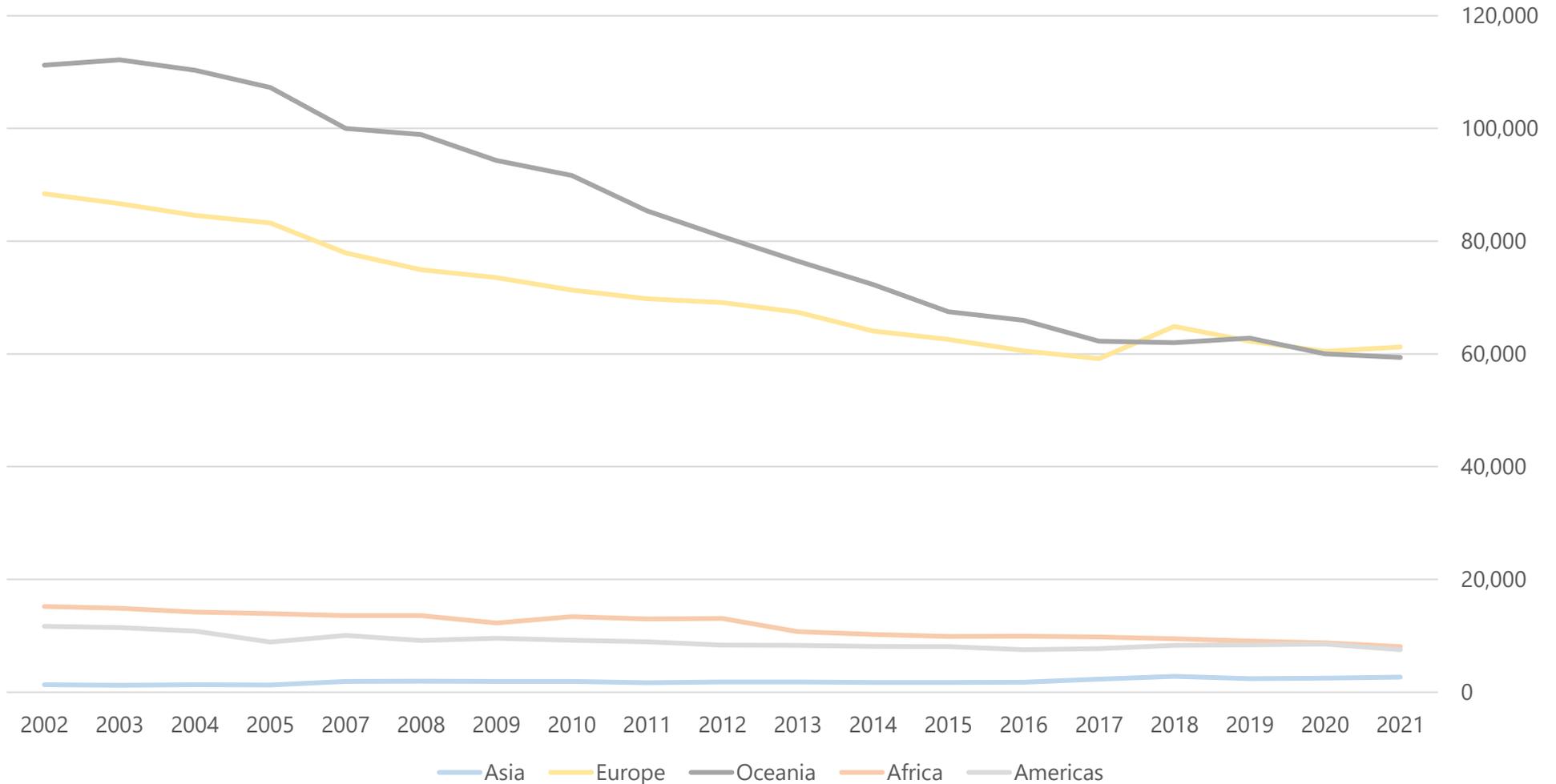


# KEY FINDINGS – MEMBERSHIP TRENDS



Total decline of 88,958 female members (39%)

### Female Members: 20 year regional trends

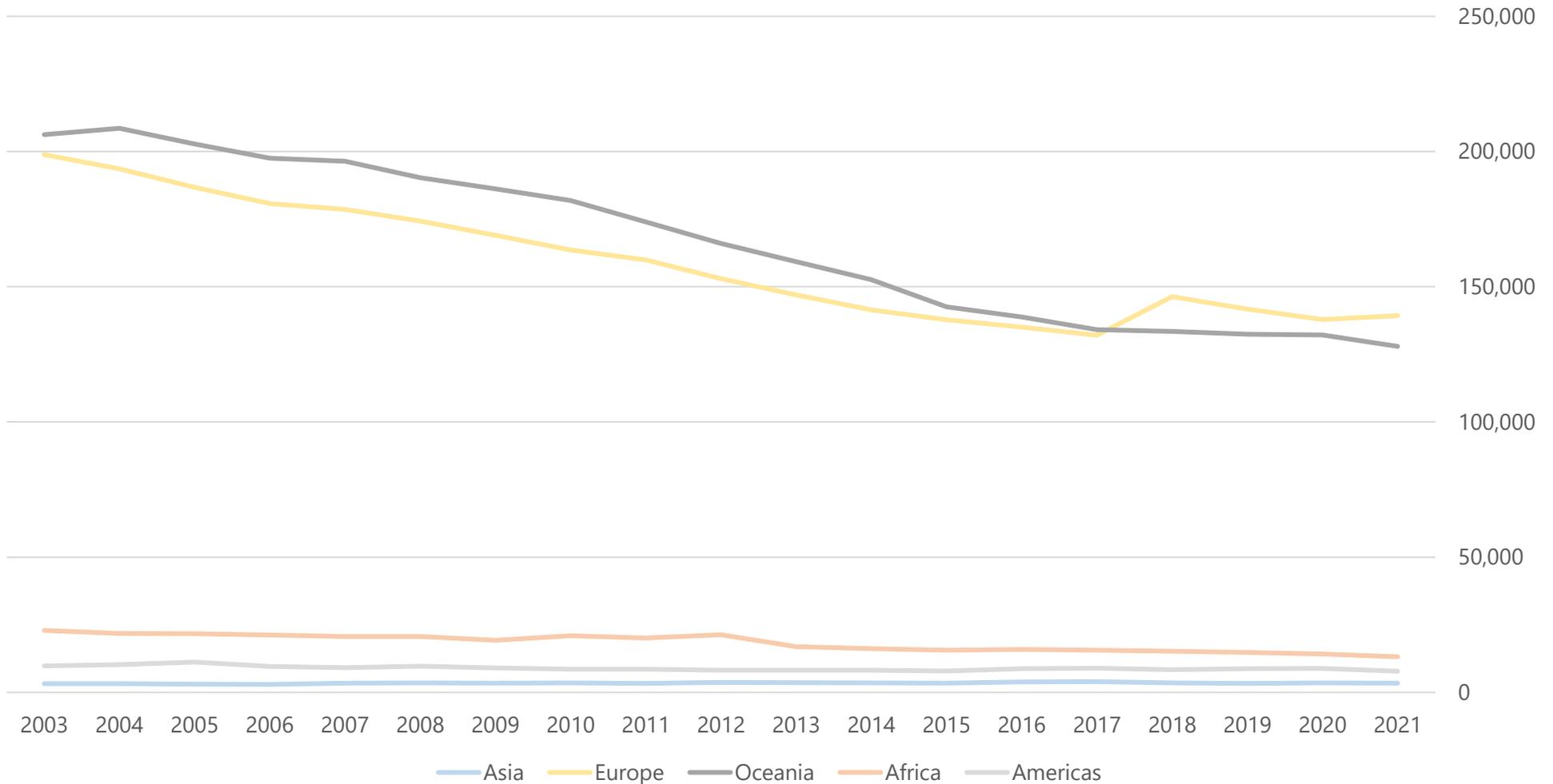


# KEY FINDINGS – MEMBERSHIP TRENDS



Total decline of 149,426 male members (34%)

Male Members: 20 year regional trends

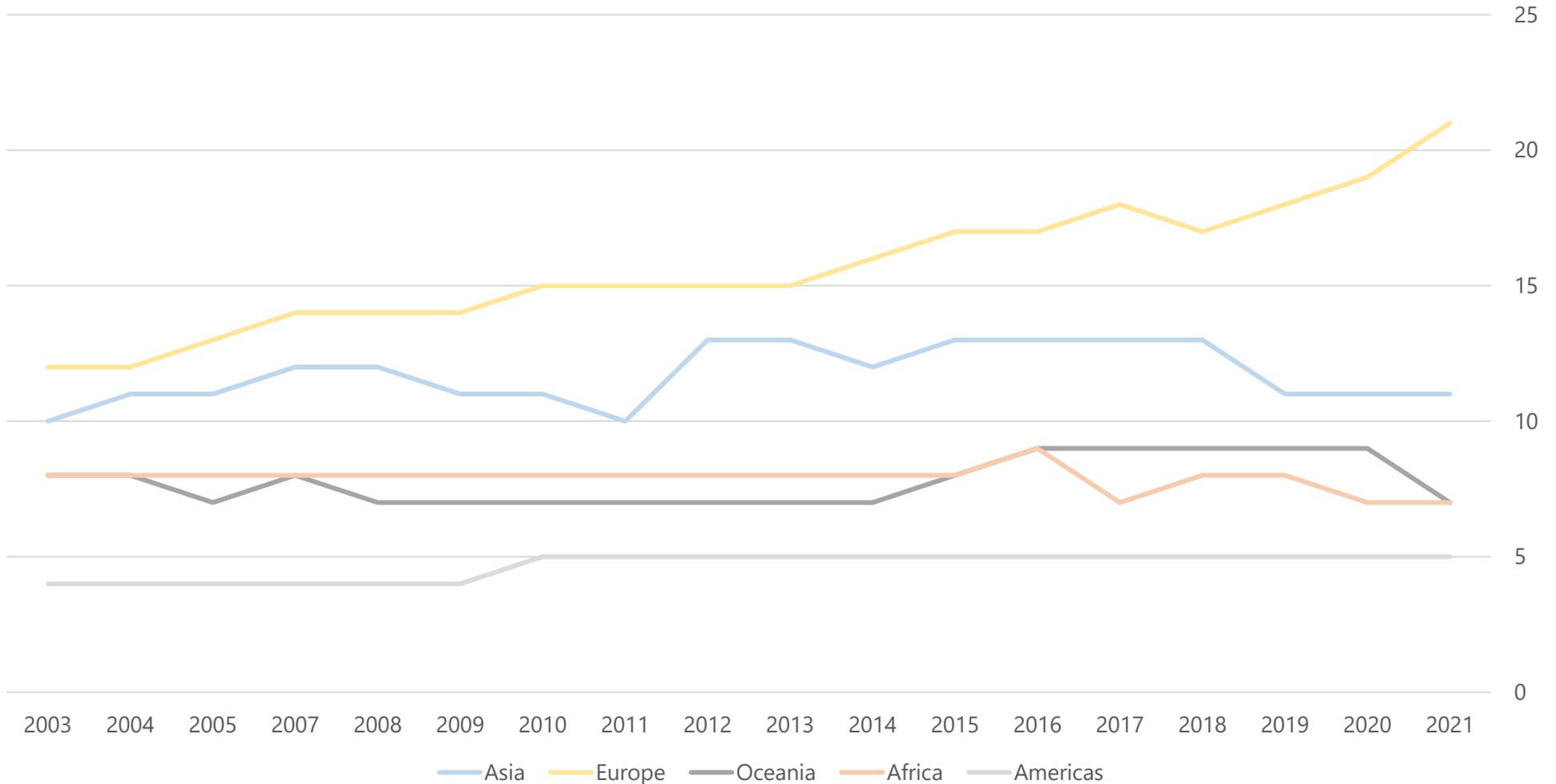


# KEY FINDINGS – MEMBERSHIP TRENDS



Total increase of 9 MNAs

MNAs: 20 year regional trends



# **INDUSTRY TRENDS AND BEST PRACTICE**

## Global survey of sport's industry executives:

- Sports federations are **forecasting overall annual growth of 4.3% over the next three to five years**, up from 4% from the past 3-5 years. League and event organisers are forecasting overall annual growth of 5.9% over the next three to five years, up from 5.6% from the past 3-5 years
  - Commercial and sponsorship rights are forecast to grow by 3.9% p.a. over the next 3-5 years
  - Media rights are forecast to grow by 3.2% p.a.
  - Ticketing and hospitality is forecast to grow by 2.5% p.a.
  - Merchandise is forecast to grow by 3.9% p.a.
  - Betting-related rights is forecast to grow by 6.4% p.a.
- The **top-two market forces** which are predicted to have the most influence on the global sports industry are:
  - The transforming media landscape – TV broadcast to streaming
  - Growing expectations for sports societal role – sustainability, equality, anti-racism, etc. - and this is partly driven by the expectations of commercial partners
- The **fastest growing 'most-watched' sports** through facebook are sports where individual athletes have significant profiles (fighting, boxing, surfing, soccer, basketball, cricket). The current 'demand' levels for sport's documentaries are dominated by individual athletes (40%) and teams/leagues (33%).

## Key implications:

- The global market is **cautiously optimistic about continued and sustainable growth**. The primary opportunities for World Bowls to focus on are **Sponsorship, Media and Merchandise**, while partnering with MNAs to drive ticketing and hospitality revenue for World Bowls events.
- As World Bowls establishes a new growth trajectory over the coming years, the longer-term strategic priorities will need to include **sustainability initiatives** and building the profile of the game on the global scale through the **promotion of 'marquee athletes'**, and innovative coverage of events - *which can take the fans behind the scenes or onto the green.*



## Source:

PwC's Sports Survey 2021: "Sports Industry: ready for recovery?"

The data is based on the opinions of 792 respondents (all senior/C-level positions) from 55 countries.

## Background:

- The General Association of International Sports Federations (GAISF) conducts regular pulse research into the good governance practices of its member International Federations.
- The 2019 survey looked specifically at 20 indicators across the following 'sections': Transparency, Integrity and Democracy, Development and Control mechanisms (a table of all indicators is provided on the following page).
- Each indicator is scored out of four, with 0 being "not fulfilled" and 4 being "totally fulfilled in a state-of-the-art way".

## Benchmarking:

- The results from the 47 respondent International Federations (IFs) ranged from 10 to 65, out of a **maximum of 80**.
- The overall **average result was 36/80** and slightly lower for IFs with 0-4 staff which averaged 34/80.
  - For reference, IFs with no staff averaged 30 and IFs with five or more staff averaged 45.
- On average, the IFs scored:
  - **Highest for Transparency (1.95/4)** average per indicator)
  - Followed by **Integrity and Democracy (1.72/4)**, and
  - **Development and Control mechanisms (1.69/4)**.
- Of interest, the average total score among IFs with **term limits** was much higher (44/80) than those without (31/80)

## Key implications:

- World Bowls has previously taken action to explore becoming a recognised member of GAISF and the International Olympic Committee (IOC), and will continue to explore this through the Bowls in the Olympics Advisory Group.
- A review and **informal self-assessment of the indicators**, outlined on the following page, would be a good exercise for World Bowls to **identify some quick-wins in improving its governance and transparency**.
- **Strong formal survey results once World Bowls has become a recognised member in the future will be seen as a positive and support any applications for being including in global events.**



## Source:

General Association of International Sports Federations: Review of Governance of International Federation Members of ARISF (IOC Recognised) and AIMS (Independent Recognised sports).

47 International Federations completed a Governance self-assessment questionnaire online between November 2018 and February 2019.

# KEY FINDINGS - GLOBAL TRENDS AND CASE STUDIES



Questionnaire Indicators and Sections (reminder it is a self-assessment survey and provision of evidence):

Transparency	Integrity and Democracy	Development and Control Mechanisms
<b>Publication of rules</b>	<b>Code of Ethics implementation</b> (specifically the IOS Code of Ethics)	<b>Education programmes</b> (coaches, umpires, athletes, etc.)
<b>Vision, mission and strategy</b>	<b>Gender balance</b> (minimum 40% of each Gender for all Board and Executives, with supporting policies)	<b>Anti-discrimination measures</b> (racial, religious or sexual orientation policies with evidence of implementation)
<b>Information on members</b> (all listed with relevant details on website)	<b>Election of President and Board Directors</b> (voting numbers published)	<b>Ethics Committee in place</b> (independent majority, starts investigations, proposes Sanctions, etc.)
<b>Details of elected officials</b> (professional biographies/CVs)	<b>Term limits</b> (in place for Directors)	<b>Internal controls/risk management</b>
<b>Annual report/news</b>	<b>Representation of stakeholders</b> (i.e. athlete appointed position on Board, or a specific reference/advisory body in place)	<b>Procedure for awarding events</b> (process, rules, criteria, timetables, external bidding assessment)
<b>Audited accounts published</b>	<b>Conflict of interest policy</b> (with evidence of register and past implementation)	<b>Right of appeal to CAS</b>
<b>Financial benefits</b> (of elected officials and senior executives)		
<b>General Assembly documents published</b> (Agenda, reference documents, minutes)		

Average scores 2+	Average scores 1.5 - 2	Average scores below 1.5
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## Major international games:

- The Commonwealth Games recently made a series of announcements, which specifically relate to future Games from 2026 and 2030
  - The organisation defines its Vision as *to use sport to create peaceful, sustainable and prosperous communities across the Commonwealth.*
  - Based on the significant financial expenditure outlays by host cities to conduct the games, the organisation has acknowledged that it must be *more* than a sporting event to justify the funding. Specifically, it is seeking to become more relevant, appealing and economically beneficial to host cities.
  - Only two sports will be mandatory (Athletics and Swimming) and host cities will be encouraged to showcase sports which are most relevant to their nation, culture and broader engagement strategies.
- Meanwhile the International Olympic Committee is demonstrating a focus on increasing the commercial benefits of the Olympic Games through its new partnership with merchandise and ecommerce platform provider, Fanatics.
  - Fanatics will establish an integrated digital marketplace for the next three Olympic Games: Paris 2024, Milano Cortina 2026, and Los Angeles 2028.
  - Aside from revenue growth, the justification is also related to maintaining knowledge across games, instead of a new host starting from scratch each time.
  - The merchandise offer will ultimately expand beyond traditional items, and they are currently exploring NFTs, among other innovative consumer engagement trends.

## Key implications:

- Becoming recognised and included in major international games is going to be more competitive among International Sporting Federations.
- The key focus areas from both the Olympics and Commonwealth Games is built on innovative formats and competitions, engaging youth audiences and alignment with broader societal benefits and causes.
- World Bowls should also consider how much transferable knowledge is currently being under-leveraged between its global events and organising committees.
- World Bowls will need to develop and maintain a significant and sustainable growth trajectory to be able to achieve the compliance and alignment requirements of the major international games.



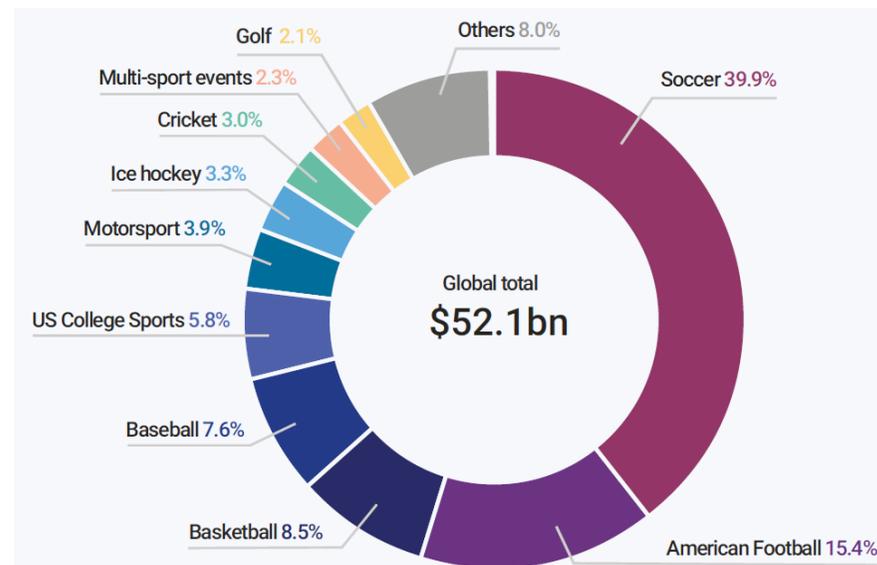
## Source:

Commonwealth Sport Strategic Roadmap 2026/30.  
Commonwealth Games Value Framework 2019.  
Fanatics and IOC commercial agreement announcement.

## Key implications:

- The global value of sports media rights has **increased by roughly \$7.2 billion** from **\$44.9 billion in 2020, to \$52.1 billion in 2021**, This is an increase of approximately 16 percent over last year's COVID affected figure. It's also \$1.1 billion more than the 2019 total of \$50.9 billion, demonstrating the industry's recovery.
- Out of the top ten sports, baseball (62.4%), United States college sports (35.9%), and golf (32.4%) had the **highest year-over-year revenue** increases, as they returned significantly from being the **most negatively affected sport by COVID-19 last year**.
- Ice hockey's high increase (31.5%) is due to a combination of **COVID-19 recovery and organic growth**, as a result of the National Hockey League's new domestic arrangements, which will begin in the 2021-22 season.
- **Soccer** remains the **most valuable sport** in the world, with media rights revenue of about **\$20.8 billion in 2021**.
- The **NFL** will continue to be **the most valuable single asset** in 2021, accounting for **15.4% of global media rights revenue**. The **United States** remains the **most valuable market** for sports media rights, worth **\$23.5 billion** in 2021. This is equivalent to 45.2% of the value of worldwide.
- Outside of Europe, stagnation and moderate growth are forecast, with total rights values in **Brazil and India** expected to **gradually improve from the COVID-19 induced drop**. Despite reaching an all-time high in value this year, **Latin America** is the only market in the top ten **expected to shrink** in the following years.

Top 10 sports share of global media value 2021



## Source:

Sport Business Consulting – Global Media Report 2021 – Executive Summary

The following are examples of modified sport formats that have been developed to appeal to broader audiences and provide commercialisation opportunities:

	<p><b>Box Lacrosse</b> is a type of indoor lacrosse that is mostly played in North America. Box lacrosse is generally played on an ice hockey rink after the ice has been removed or covered, between two teams of five players and one goaltender each.</p>	<p><b>Number of players per team:</b> 6  <b>Time format :</b> Four 15-minute quarters; two minutes between quarters; 15-minute halftime.  <b>Number of teams :</b> 15  <b>Broadcasted on:</b> B/R Live</p>
	<p><b>Rugby Sevens</b> is a team of seven players playing seven minutes instead of the usual 15 players playing 40 and a half minutes. A variant of the rugby union playing half. Rugby Sevens is run by World Rugby, which is responsible for rugby unions around the world.</p>	<p><b>Number of players per team:</b> 15  <b>Time format:</b> Seven minutes each half, with a two-minute half time interval.  <b>Number of Teams:</b> 15  <b>Broadcasted on:</b> Foxtel Now</p>
	<p><b>The Hundred</b> is a professional franchise 100-ball cricket tournament with eight men's and eight women's teams in major cities in England and Wales. The tournament is run by the England and Wales Cricket Commission (ECB) and was first held in July and August 2021.</p>	<p><b>Number of players per team:</b> 15  <b>Number of Teams:</b> 16 (8 men's and 8 women's)  <b>Broadcasted on:</b> BBC</p>
	<p><b>3x3 Basketball</b> is a variant of basketball played on three sides in one backboard and a half-court setup. 3x3 is the world's largest urban team sport. This basketball game format is currently being promoted and built by FIBA (International Basketball Federation).</p>	<p><b>Number of players per team:</b> 3  <b>Time format:</b> Single period of 10 minutes with sudden death at 21 points.  <b>Number of Teams:</b> 40  <b>Broadcasted on:</b> NBC Sports</p>
	<p><b>Fast5</b> is a variant of netball with a shortened game and goals worth multiple points which depends on where it is scored from. The new format was announced by the International Federation of Netball Association (IFNA) in 2008 and was developed primarily for the new international competition, the Fast5 Netball World Series.</p>	<p><b>Number of players per team:</b> 5  <b>Time format:</b> 6 minutes each quarter  <b>Number of Teams:</b> 6  <b>Broadcasted on:</b> Sky Sports</p>

# **STRATEGIC BENCHMARKING: INTERNATIONAL SPORTING FEDERATIONS**

# KEY FINDINGS - BENCHMARKING



1. World Bowls sits along with World Lacrosse, World Netball and International Federation of Sport Climbing in terms of finances, scale and size.
2. Organisations like World Rugby, International Tennis Federation and World Curling are significantly bigger in terms of finances, scale and size.
3. International Tennis Federation has the most number of strategic priorities including the plans around Olympics and Paralympics.

Organisation Name	Total Affiliated Countries	Total Revenue (AUD\$)	Strategic Priorities
World Bowls	54	434,176	Governance and Leadership, Development, Events, Image and Communication
World Netball	76	728,560	Grow, Play, Inspire and Govern
International Federation of Sport Climbing	74	3,911,269	Development, Sustainable Growth, Lead, Capacity Building, Engagement
World Lacrosse	67	4,094,487	
Badminton World Federation	176	5,299,197	
Federation Internationale De Natation	209	13,272,477	
World Curling Federation	67	15,935,573	
World Rugby	128	45,429,734	Competition, Participation, Development, Olympics and Paralympics, Partnerships, Increase Worldwide Audience, Increase Transparency and Sustainability.
International Tennis Federation	211	49,139,000	
World Baseball Softball Confederation	141	-	

# VISION STATEMENT

Logo	STA/WB	Vision Statement
	World Bowls	Bowls... The international sport for all.
	Badminton World Federation	Giving every child a chance to play for life.
	World Lacrosse	Lacrosse is recognized and played by all countries worldwide and is an Olympic sport.
	World Rugby	A decade of growth through partnership.
	Federation Internationale De Natation	To enable everyone in the world to swim.
	International Tennis Federation	-
	International Federation of Sport Climbing	To make the world a better place through Sport Climbing.
	World Netball	A socially responsible sports movement, recognised universally for its positive impact on people and communities around the world.
	World Curling Federation	To make the world a better place by growing our sport and expanding our culture and values around the globe.
	World Baseball Softball Confederation	A billion-strong, baseball-softball community where all participants have a stake in the game.

# MISSION STATEMENT

Logo	STA/WB	Mission Statement
	World Bowls	To be recognised as a modern, progressive and effective International Federation to globally govern, promote, foster and develop the sport of Bowls.
	Badminton World Federation	To lead and inspire all stakeholder – deliver spectacular event management, drive fan engagement, create innovative and sustainable development initiatives and support our membership to maximise outcomes for the sport.
	World Lacrosse	World Lacrosse will develop lacrosse throughout the world to positively impact the lives of its participants and their communities.
	World Rugby	World Rugby's purpose is to grow rugby by making it more relevant and accessible, with a vision of a global sport for all, true to its values.
	Federation Internationale De Natation	To increase participation in all aquatic sports.
	International Tennis Federation	To further grow and promote the sport worldwide, to develop the game at all levels and ages, and to make, amend and uphold the rules of the game.
	International Federation of Sport Climbing	To grow the Sport Climbing community and to foster the furtherance of Sport Climbing worldwide; To effectively and efficiently govern, develop, showcase and promote Sport Climbing through sustainable events for athletes, member federations and key stakeholders.
	World Netball	To expand netball's worldwide reach and impact, building on our unique female-focused foundations
	World Curling Federation	To lead the worldwide curling community through the promotion and development of our sport, our culture and our values.
	World Baseball Softball Confederation	To grow baseball and softball globally, increasing the practice, popularity, exposure and access to the game, thereby making baseball/softball more attractive to new audiences, players, multisport organisations, event hosts, broadcast and commercial partners.

Logo	STA/WB	Values
	World Bowls	Global Leadership, Integrity, Collaboration, Continuous Improvement and Innovation.
	Badminton World Federation	Excellence, Innovation, Entertainment, Integrity, Inclusion.
	World Lacrosse	Teamwork, Integrity, Passion, Friendship, Respect, Inclusiveness.
	World Rugby	Integrity, Passion, Solidarity, Discipline and Respect.
	Federation Internationale De Natation	-
	International Tennis Federation	Good Governance, Integrity and Trust, Inclusiveness, Innovation, Ambition and Collaboration.
	International Federation of Sport Climbing	Respect and Support for Olympic Values and Principles, Preserving the Environment in Organising and Promoting the Activities, Accessible, Safe, Low Cost, Healthy and Educational Activity for Youth, Equality between Men and Women, Competitive, Fair, Transparent and Objective Judging Rules, Sport for All.
	World Netball	Excellence, Teamwork, Heart, Integrity, Courage, Athletes, Leadership.
	World Curling Federation	We are Governed by the Spirit of Curling; We are inclusive; We are open; We are Stewards of our Sport; We strive for excellence.
	World Baseball Softball Confederation	Team Spirit & Friendship, Integrity & Respect, Tradition & Innovation, Diversity & Unity, Excellence & Fun

# FINANCIAL DATA (USD\$)

The following numbers are the most recent financial reports of the given federations.

Logo	Total Assets (\$)	Total Liabilities (\$)	Net Assets(\$)	Total Expenses (\$)	Total Revenue (\$)
	349,468	348,744	723	-	316,568
	-	-	-	895,509	529,255
	4,390,199	920,072	3,470,128	-	2,841,299
	1,772,484	346,392	1,426,092	-	2,985,386
	41,284,786	10,884,823	30,399,963	14,390,284	3,902,922
	189,424,430	98,006,420	91,418,009	30,208,166	9,641,648
	25,348,415	16,688,859	8,695,556	11,376,484	11,634,566
	332,331,196	248,398,680	83,932,516	-	33,001,943
	105,237,000	55,801,434	52,477,247	76,655,000	72,835,000
	13,834,099	907,089	12,927,010	-	-

# FINANCIAL DATA (GBP £)

The following numbers are the most recent financial reports of the given federations.

Logo	Total Assets (\$)	Total Liabilities (\$)	Net Assets(\$)	Total Expenses (\$)	Total Revenue (\$)
	257,474	256,940	533	-	233,234
	-	-	-	659,774	389,933
	3,234,517	677,870	2,556,646	-	2,093,351
	1,305,893	255,207	1,072,173	-	2,199,509
	30,111,778	7,939,035	22,172,742	10,495,804	2,846,664
	139,560,066	72,207,067	67,352,999	22,256,124	7,103,567
	18,702,185	12,295,659	6,406,525	8,381,722	8,528,883
	244,847,847	183,009,849	61,837,998	-	24,314,463
	79,775,243	41,112,183	38,663,059	35,062,700	26,299,701
	10,192,390	668,306	9,524,085	-	-

# FINANCIAL DATA (AUD\$)

The following numbers are the most recent financial reports of the given federations.

Logo	Total Assets (\$)	Total Liabilities (\$)	Net Assets(\$)	Total Expenses (\$)	Total Revenue (\$)
	479,299	478,307	992	-	434,176
	-	-	-	1,232,737	728,560
	6,043,450	1,266,550	4,776,900	-	3,911,269
	2,430,979	475,080	1,955,899	-	4,094,487
	56,054,462	14,778,880	41,275,582	19,538,423	5,299,197
	260,757,416	134,913,437	125,843,979	41,583,883	13,272,477
	34,943,615	22,973,508	11,970,107	15,660,612	15,935,573
	457,479,660	341,940,044	115,539,616	-	45,429,734
	149,054,000	76,815,000	72,239,000	65,512,000	49,139,000
	19,043,711	1,248,679	17,795,032	-	-

# STRATEGIC PLANS/PRIORITIES

## World Bowls Strategic Plans/Priorities



- **Governance and Leadership**
  - To maintain and enhance governance and management structures which provide leadership, direction and quality service to World Bowls' stakeholders.
- **Development**
  - To encourage initiatives that increase participation.
  - To attract new Member National Authorities.
  - To assist and support developing Member National Authorities.
- **Events**
  - To produce a programme of world events, which maximises the profile of the sport, revenue opportunities and participation by Member National Authorities.
- **Image and Communication**
  - To raise the profile of bowls as a globally recognised and respected sport using fit for purpose methods and technologies within the resources available.

## World Netball Strategic Plans/Priorities



- **Grow**
  - Increase global participation, reach, revenue and capacity
- **Play**
  - Drive game development and worldwide delivery of a portfolio of thrilling world-class events.
- **Inspire**
  - Harness the power of netball to change lives.
- **Govern**
  - Remain a leader in best practice.

## Badminton World Federation Strategic Plans/Priorities



- **Entertainment**
  - Excite, engage and enhance our global fan base through inspirational performances at world-class events.
- **Participation**
  - Give every child a chance to play for life.
- **Athletes**
  - Provide the best possible environments for training and competition; showcase the extraordinary talent of performance athletes; and provide opportunities to learn and develop beyond the field of play.
- **Partnerships**
  - Develop effective international relations and foster strategic partnerships to achieve shared goals.
- **Capacity Building**
  - Strengthen and enable organisational capacity of the BWF, Continental Confederations and Member Associations to support strategic implementation.

## World Lacrosse Strategic Plans/Priorities



- **Grow** the game, popularity and appeal of lacrosse globally.
- **Build** the brand of lacrosse and the resources available to World Lacrosse and its Members.
- **Lead** the sport by improving the core competencies of World Lacrosse, its Continental Federations, National Governing Bodies, and Management to support the effort.
- **Influence** the International Olympic Committee, Olympic Family and Host Cities for the Olympic Games positively by effectively building relationships and successfully presenting the case of lacrosse to the IOC

<h2>World Rugby Strategic Plans/Priorities</h2>	
<ul style="list-style-type: none"> <li>• <b>Competition</b> <ul style="list-style-type: none"> <li>○ There are plans to launch a new men’s and women’s emerging nations competitions by 2022 to increase high-performance competition opportunities, and a revamped sevens rugby ecosystem.</li> </ul> </li> <li>• <b>Participation</b> <ul style="list-style-type: none"> <li>○ World Rugby acknowledges women’s rugby is the single biggest opportunity to grow the sport.</li> </ul> </li> <li>• <b>Engagement</b> <ul style="list-style-type: none"> <li>○ The governing body plans to facilitate knowledge sharing, as well as generating insight and materials, such as marketing and communications toolkits, for regional associations and unions.</li> </ul> </li> <li>• <b>The Game itself</b> <ul style="list-style-type: none"> <li>○ Throughout the life of this strategic plan, we will lead an open discussion with all our stakeholders about how we can continually advance player welfare and be constantly guided by scientific advice and medical advances.</li> </ul> </li> </ul>	

<h2>Federation Internationale De Natation Strategic Plans/Priorities</h2>	
<ul style="list-style-type: none"> <li>• <b>Raising standards</b> <ul style="list-style-type: none"> <li>○ Optimise organisational effectiveness.</li> <li>○ Apply good governance throughout FINA and its stakeholders.</li> <li>○ Ensure the wellbeing of athletes and the sport.</li> </ul> </li> <li>• <b>Accelerating potential</b> <ul style="list-style-type: none"> <li>○ Increase participation in aquatic sports.</li> <li>○ Optimise high-performance pathways.</li> </ul> </li> <li>• <b>Uniting passions</b> <ul style="list-style-type: none"> <li>○ Engage and grow audiences worldwide.</li> <li>○ Inspire athletes to be the best they can be.</li> </ul> </li> <li>• <b>Sustaining growth</b> <ul style="list-style-type: none"> <li>○ Consistently deliver entertaining events.</li> <li>○ Unite stakeholders in the promotion of aquatic sports.</li> <li>○ Maximise revenues for sustainable growth of aquatic sports.</li> </ul> </li> </ul>	

## International Tennis Federation Strategic Plans/Priorities



- **Opportunity** - Tennis is the world's most universal sport, and we provide opportunities for all kind of players everywhere.
- **Development** - We commit millions of dollars to the development of tennis, helping thousands of players every year
- **Davis Cup and Billie Jean King Cup** - We're making changes to protect the long-term future of our flagship competitions
- **Olympics and Paralympics** - Tennis is a highlight of the Olympic and Paralympic Games for players and fans alike. We want to elevate tennis' position even further.
- **Investment** - The revenue we raise is invested into tennis development worldwide
- **Partnerships** - Together we are stronger, and we work with other organisations to shape the future of tennis
- **Communications** - Engaging better with our member nations ensures we work together for the future of our sport

## International Federation of Sport Climbing Strategic Plans/Priorities



- **Showcase** Sport Climbing through events
- **Develop** Sport Climbing
- **Strengthen** Membership and Governance
- **Increase IFSC brand awareness**
- **Promote** Sport Climbing globally

## World Curling Federation



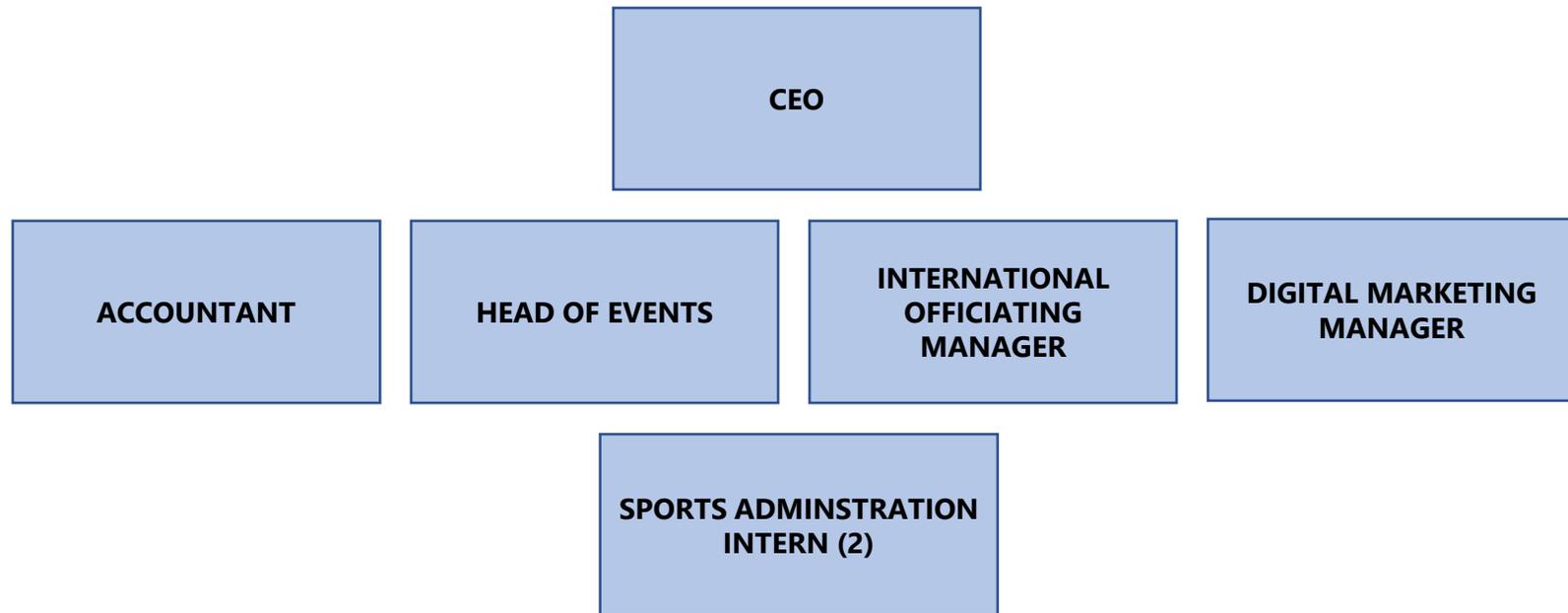
- **Organisational Sustainability**
  - To constantly seek improvement as an organisation.
- **Engagement**
  - To promote our identity, our culture and our values to an ever-increasing audience..
- **Development**
  - In order to pursue our Mission and realise our Vision, we should look to expand our community in terms of the number of curlers and Member Associations, as well as the number of facilities.
- **Competitions**
  - To run and showcase the best events.

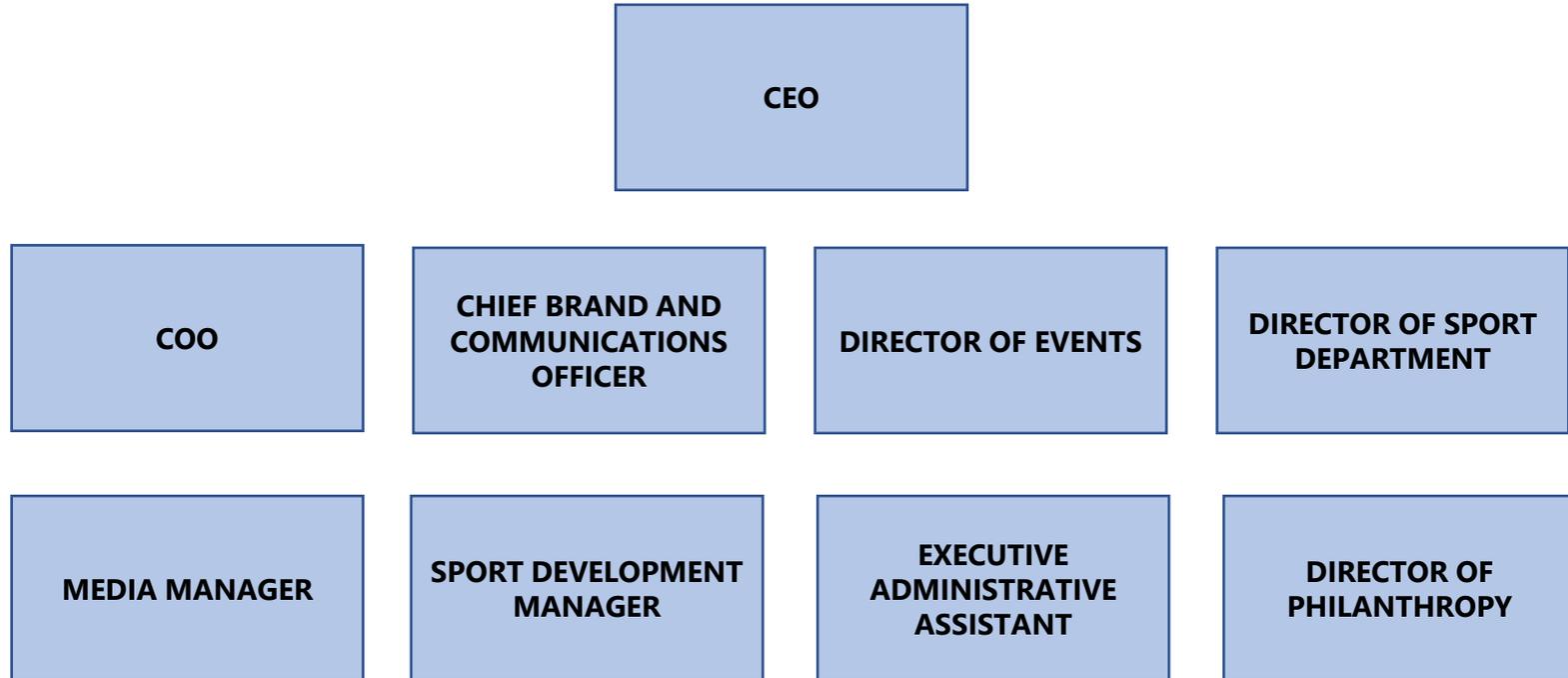
## World Baseball Softball Confederation

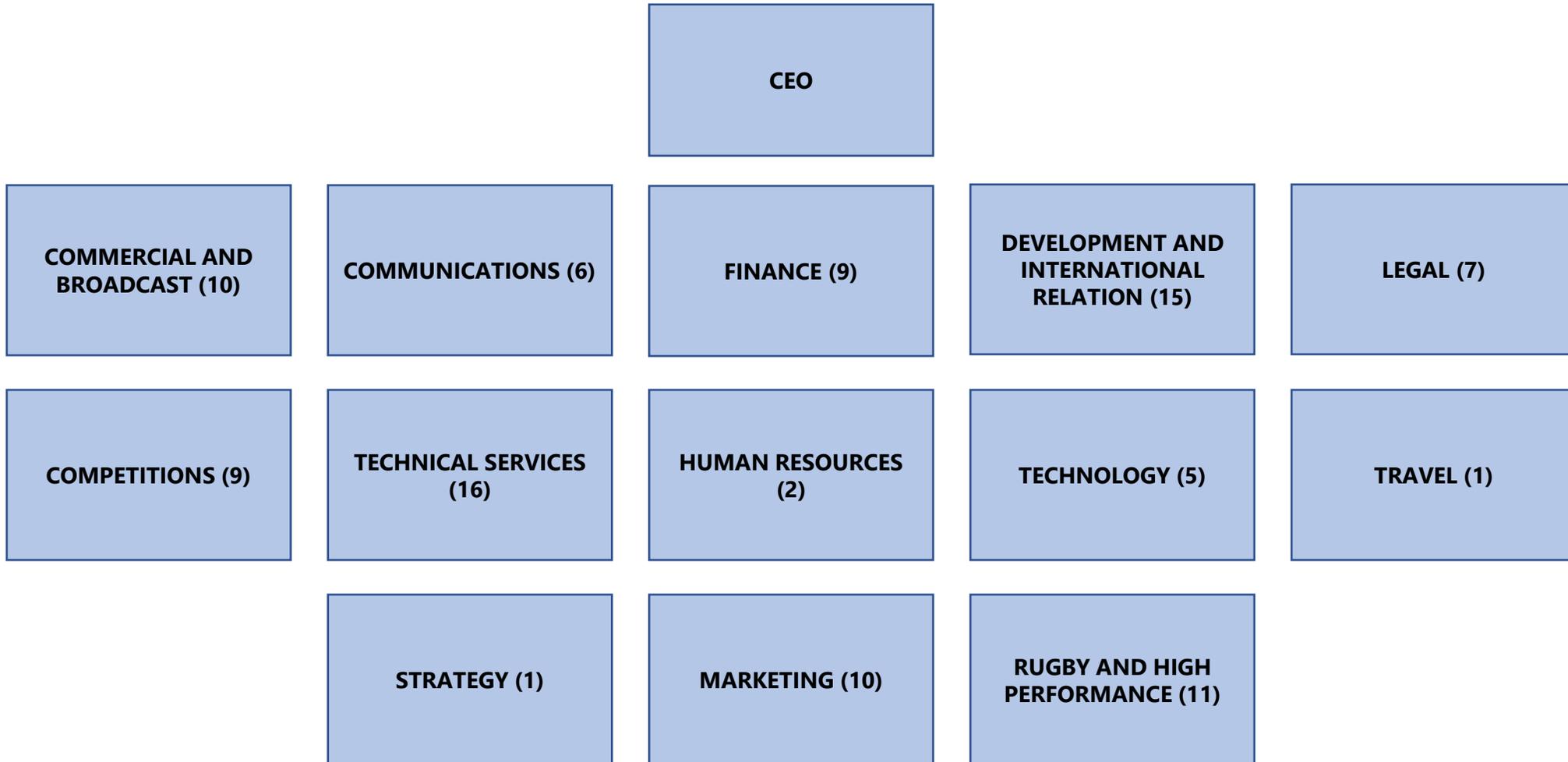


- Become a permanent fixture on the Olympic Programme
- Consolidation of Continental Associations and the WBSC Family
- Strengthen WBSC Governance and Reputation
- Grow our sport and make it relevant in people's lives and in their communities
- Increase worldwide audience and media engagement
- Event excellence
- Increase transparency and sustainability
- Enhance WBSC's leadership and relationships
- Secure a portfolio of global recognisable brands as WBSC sponsors

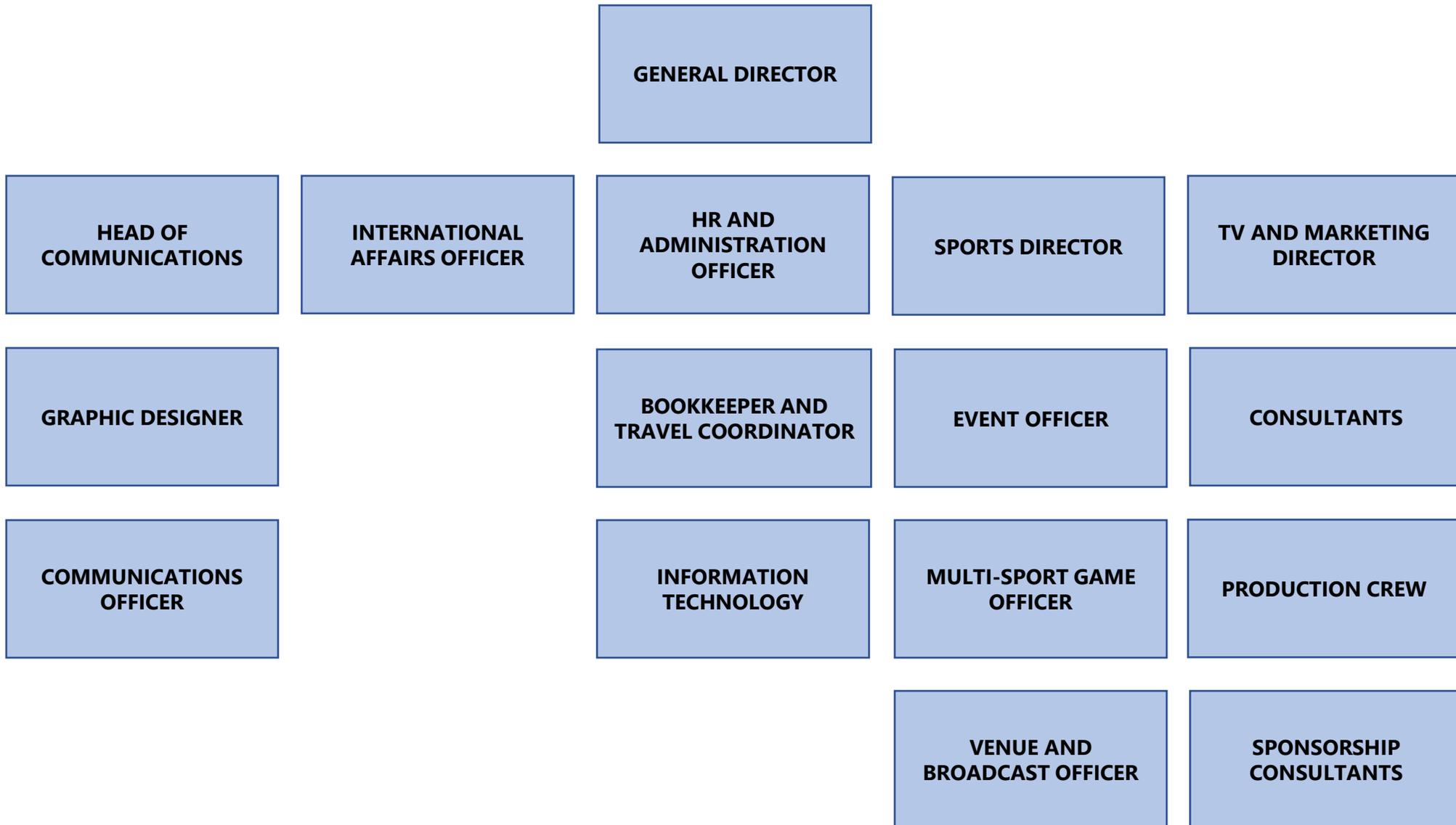
# STAFFING STRUCTURES

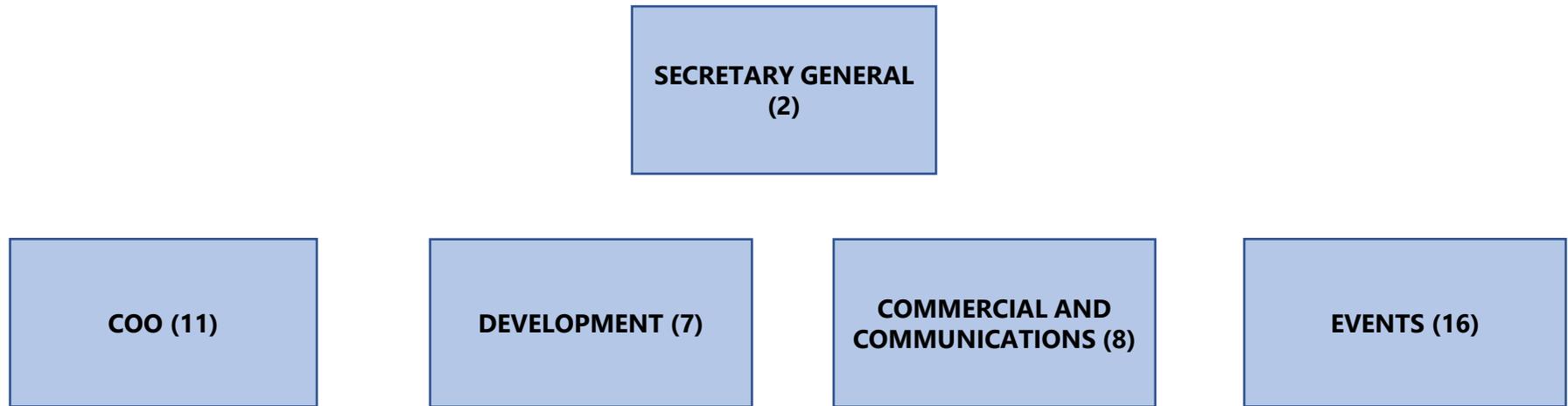






# INTERNATIONAL FEDERATION OF SPORT CLIMBING





**EXECUTIVE BOARD**

**EXECUTIVE DIRECTOR**

**MEDIA**

**BASEBALL SOFTBALL**

**DEVELOPMENT**

**EVENT**

**FINANCE**

**MARKETING**

**LEGAL**

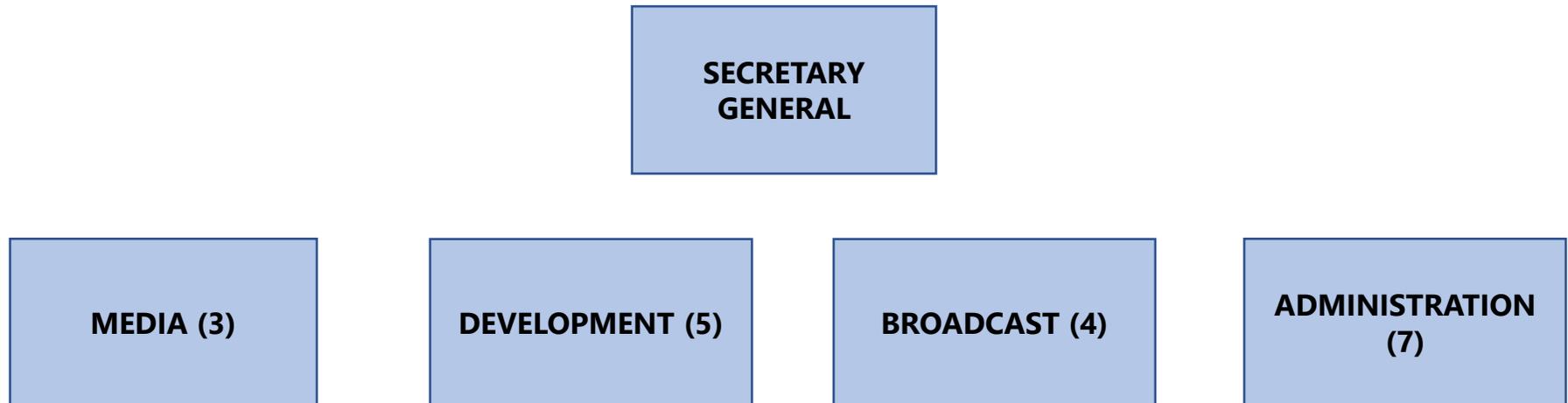
**HUMAN RESOURCES**

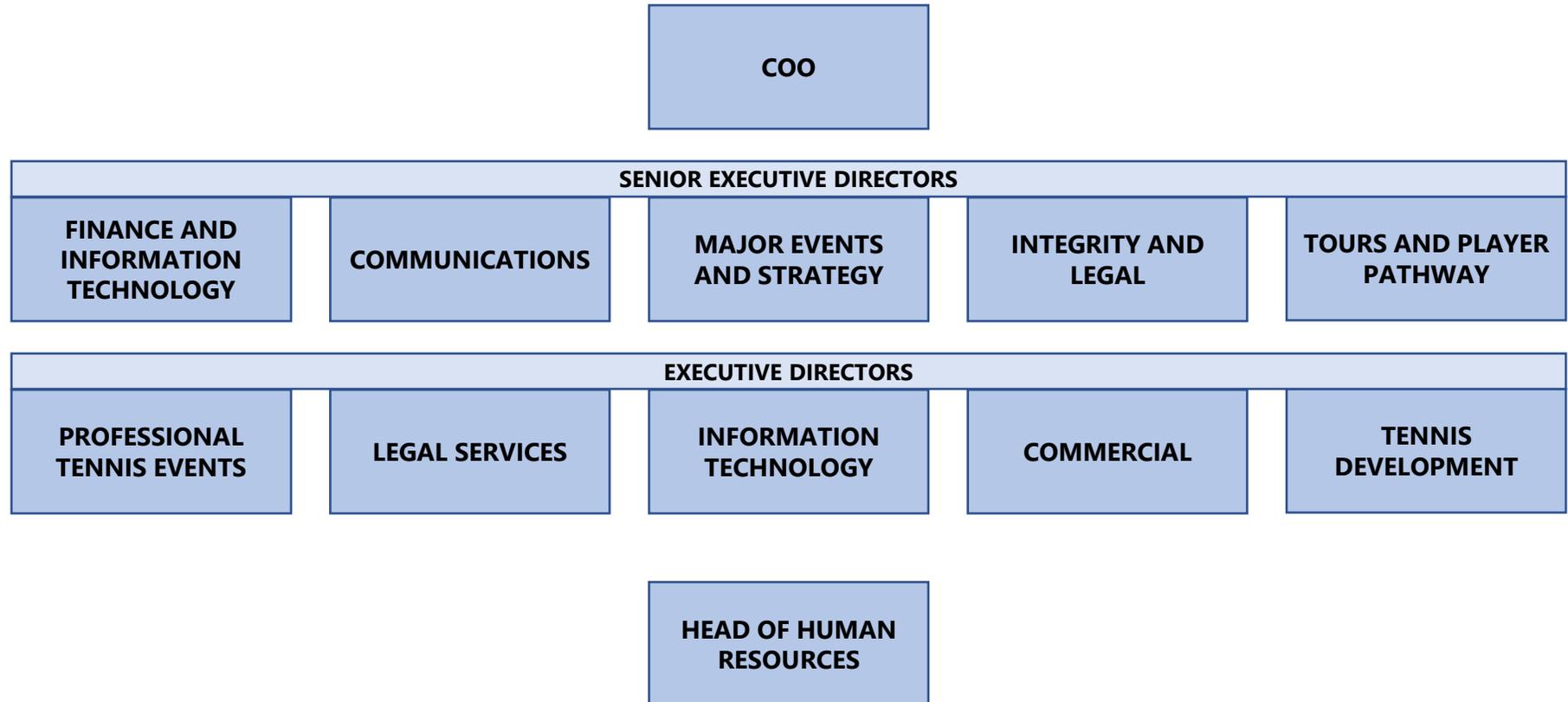
**INFORMATION  
TECHNOLOGY**

**MEDICAL –  
ANTI DOPING**

**NATIONAL  
FEDERATIONS  
RELATIONS**

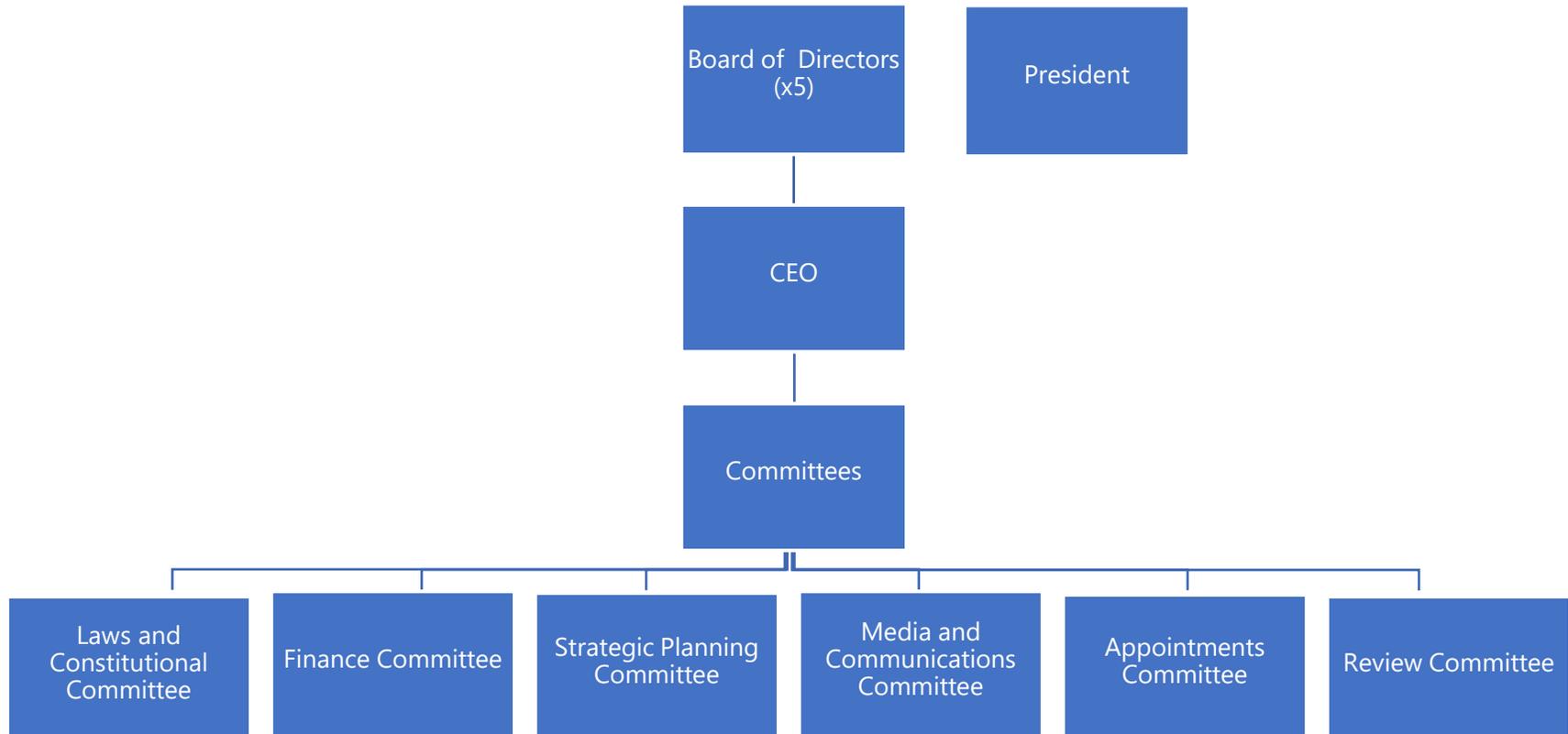
**TV BROADCAST**



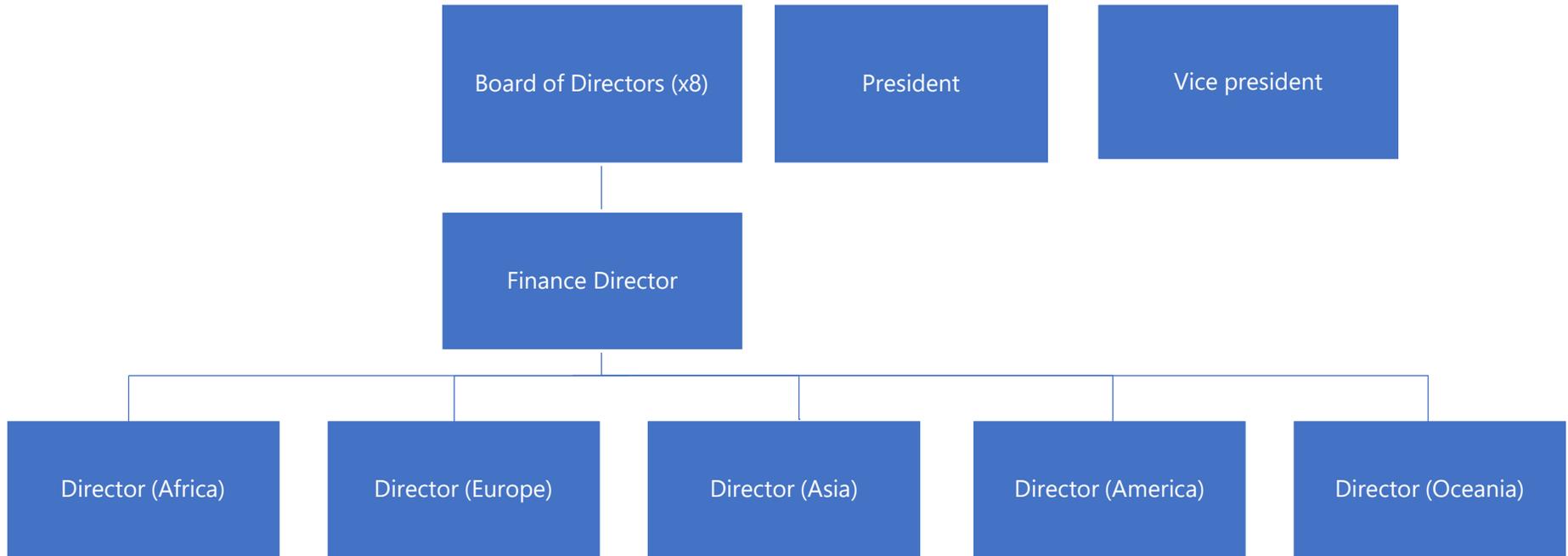


# ORGANISATION CHARTS

# GOVERNANCE STRUCTURE – WORLD BOWLS



# GOVERNANCE STRUCTURE – WORLD NETBALL

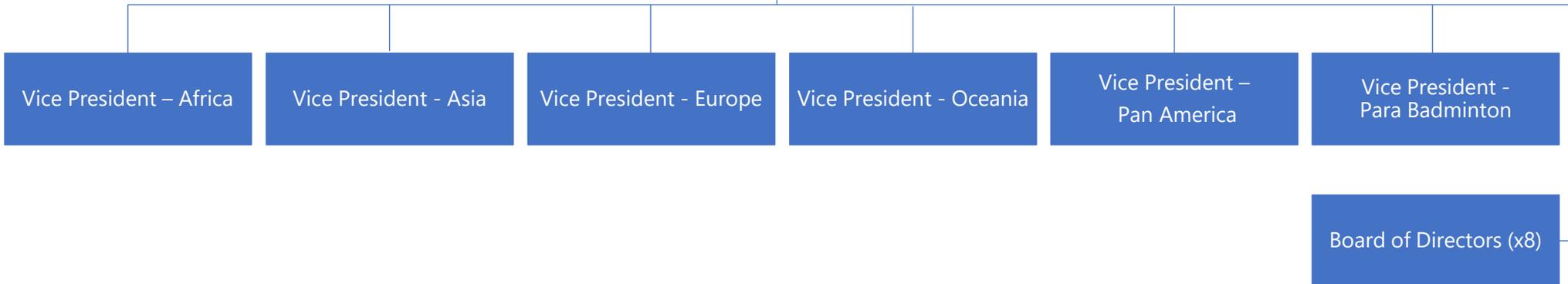


# GOVERNANCE STRUCTURE – BADMINTON WORLD FEDERATION

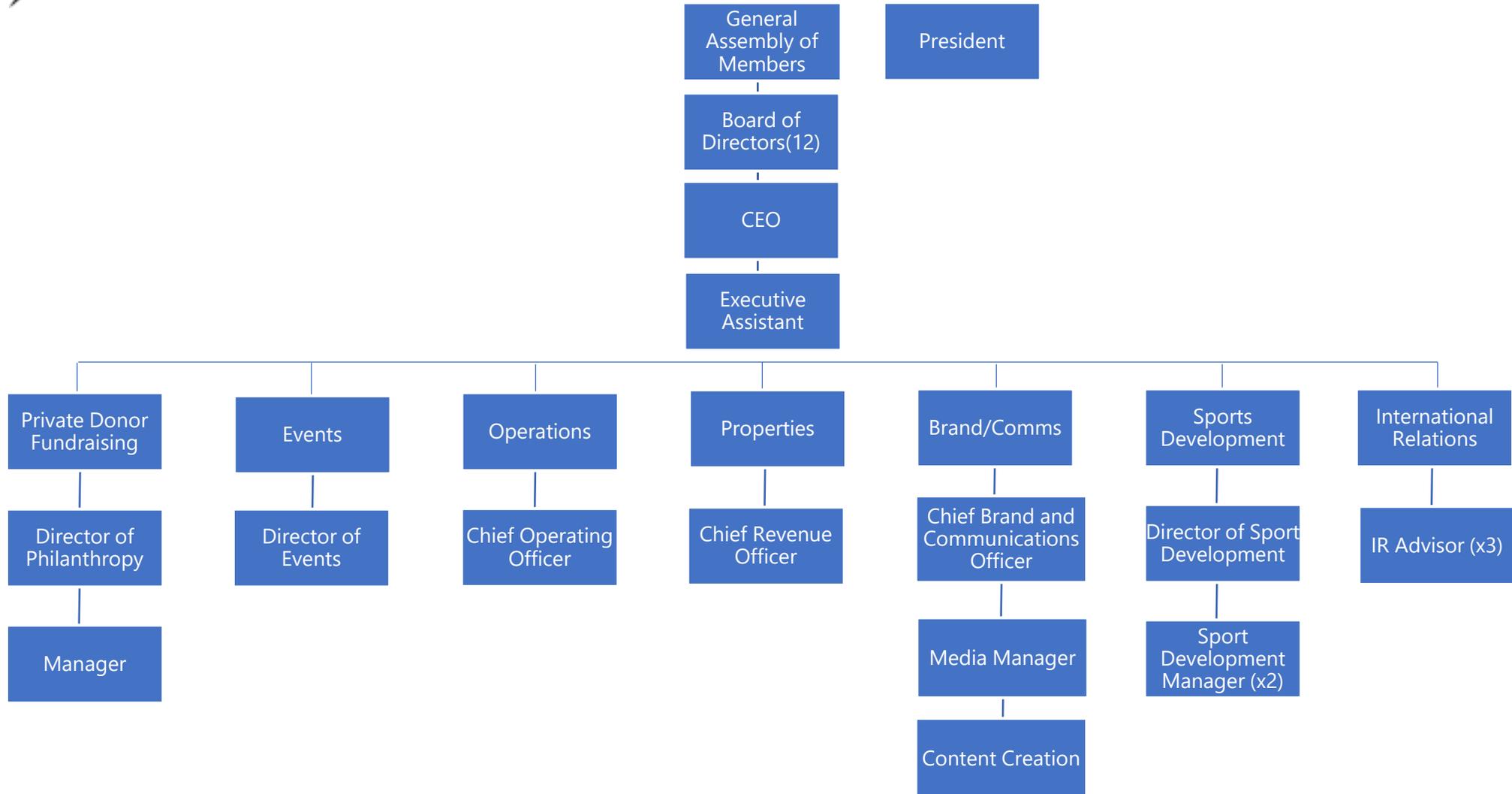


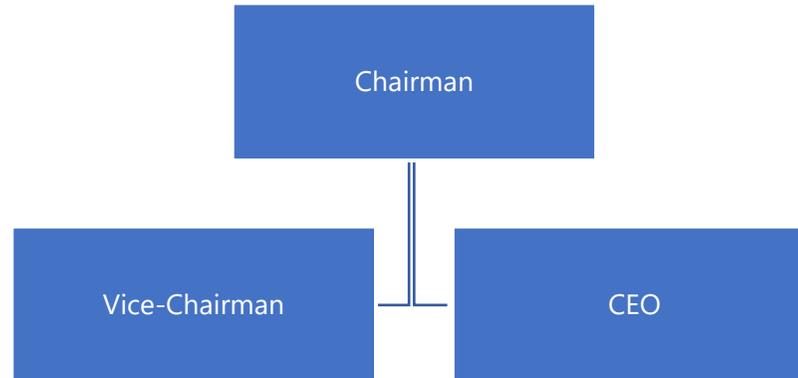
President

Deputy President



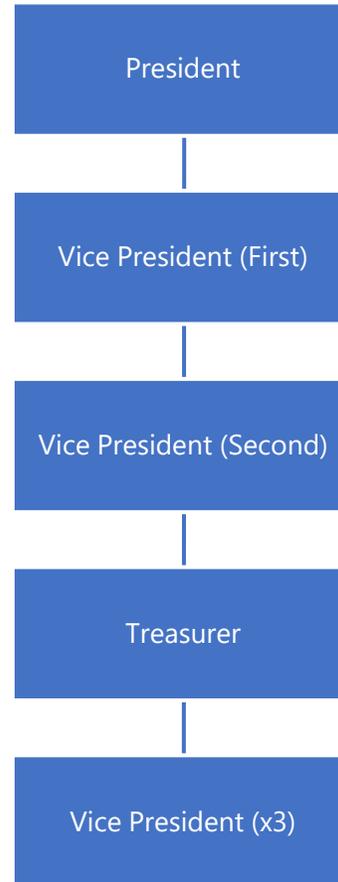
# GOVERNANCE STRUCTURE – WORLD LACROSSE



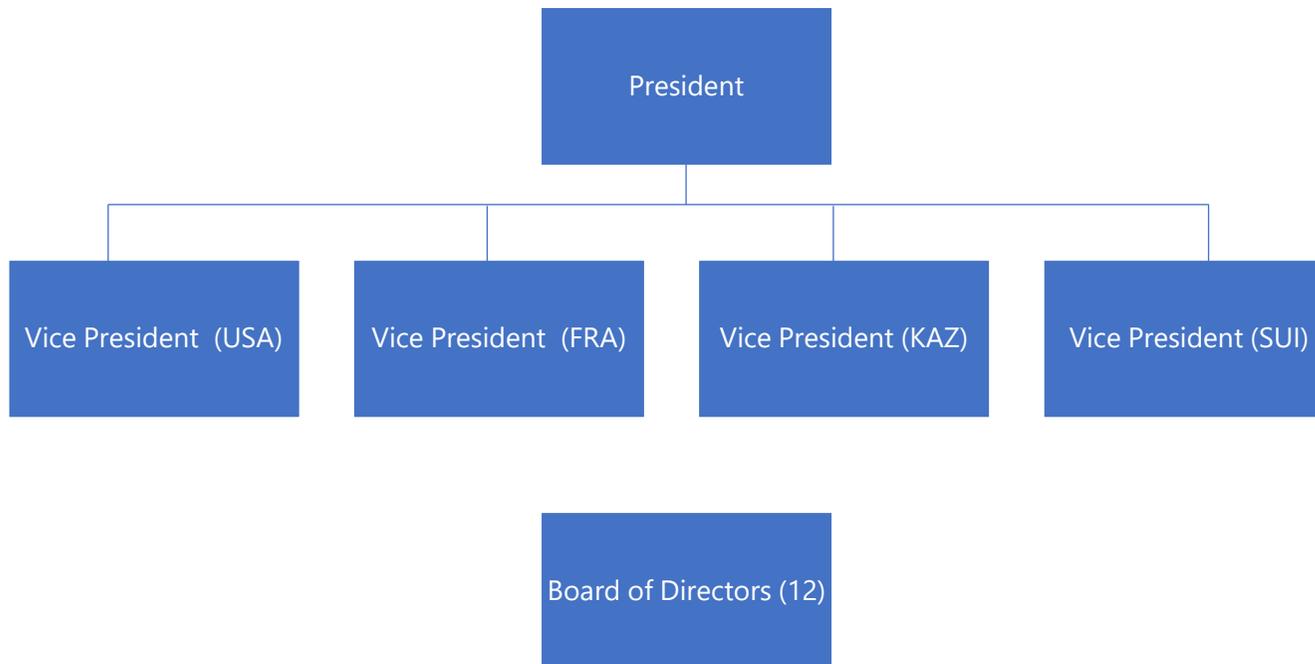




FÉDÉRATION  
INTERNATIONALE  
DE NATATION



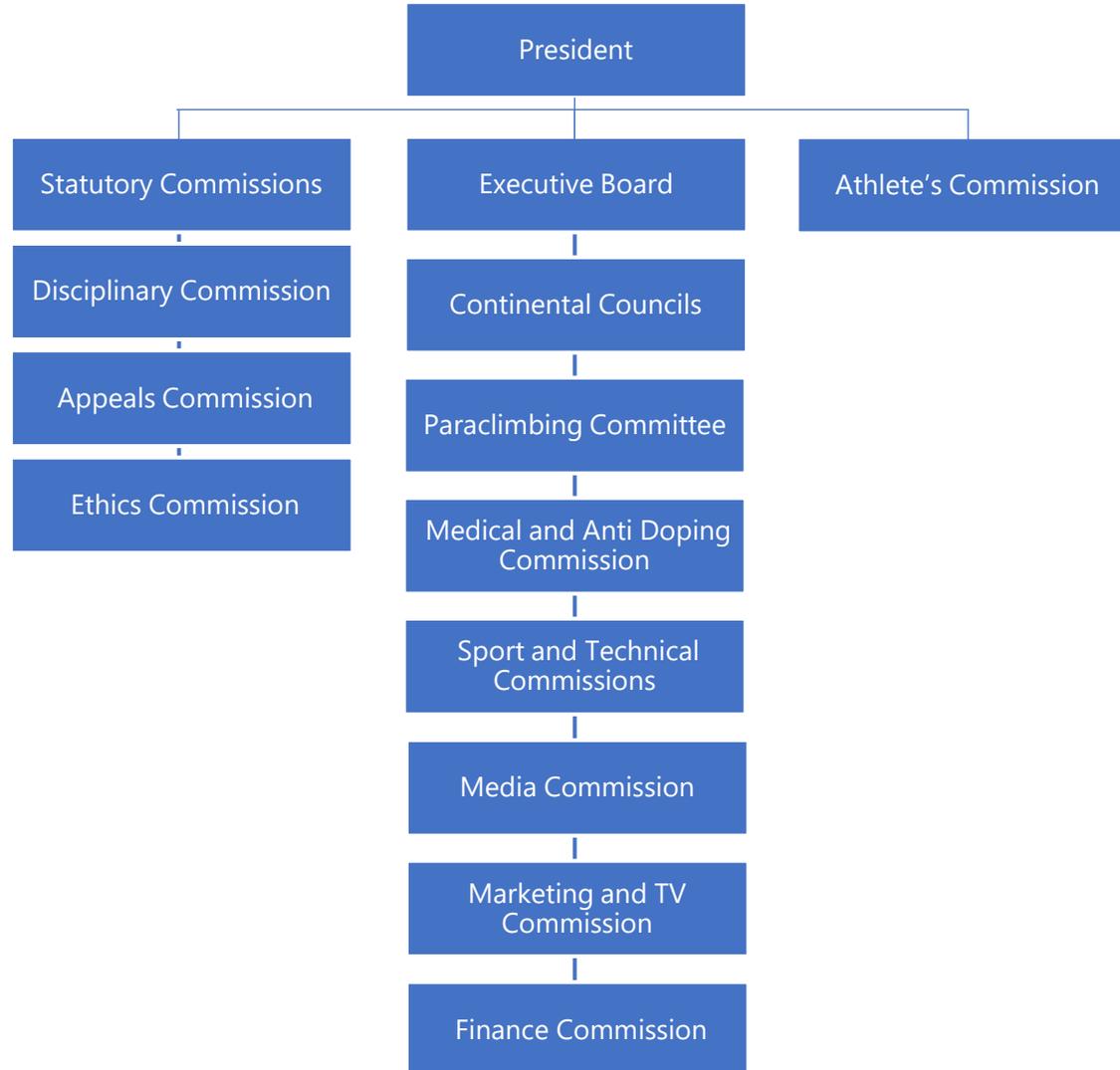
# GOVERNANCE STRUCTURE – INTERNATIONAL TENNIS FEDERATION



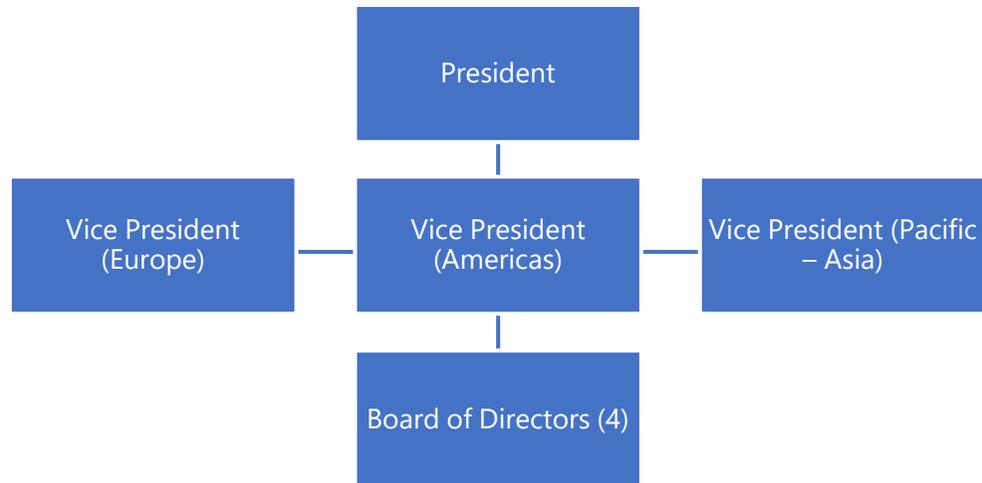
# GOVERNANCE STRUCTURE – INTERNATIONAL FEDERATION OF SPORT CLIMBING



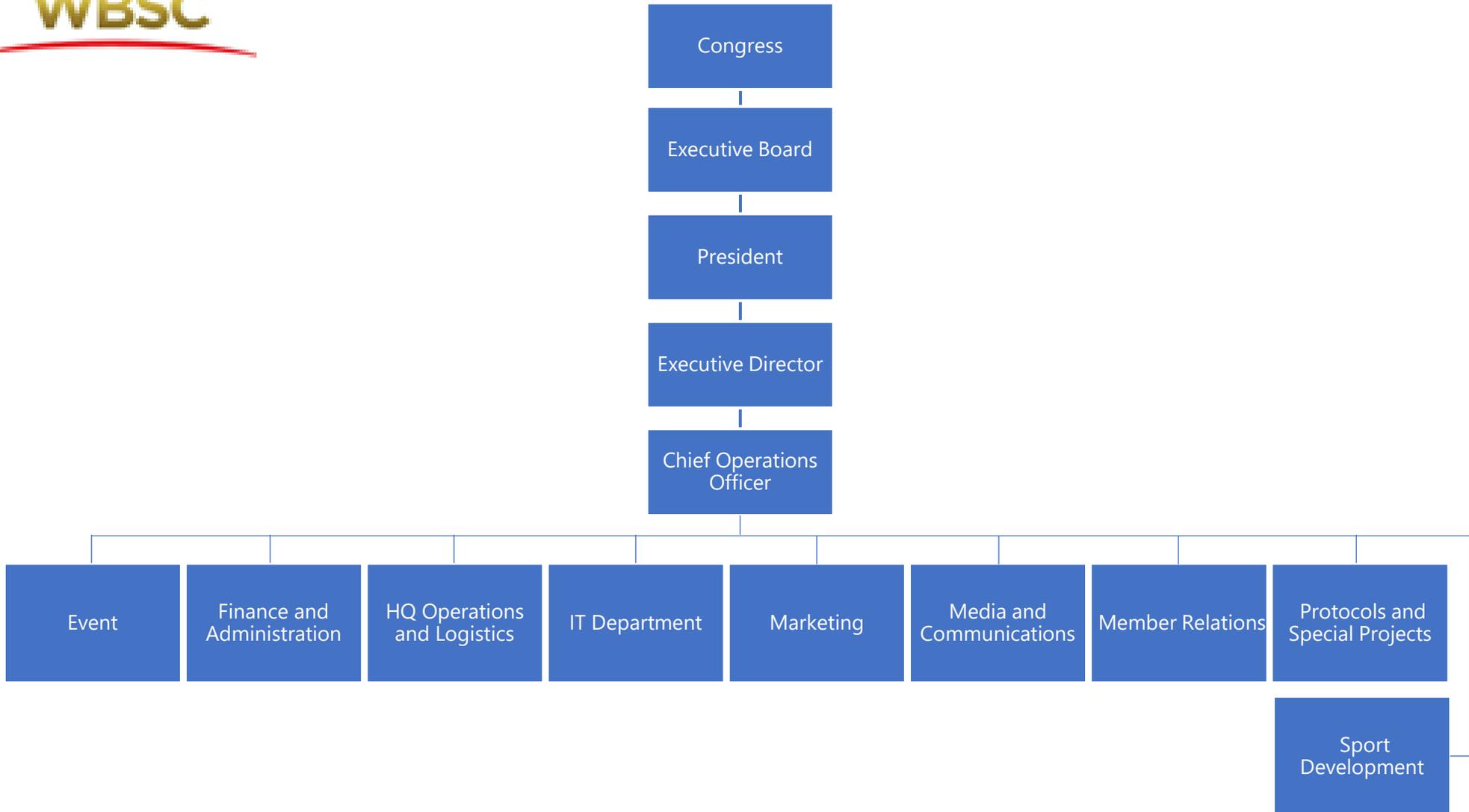
INTERNATIONAL FEDERATION  
OF **SPORT CLIMBING**



# GOVERNANCE STRUCTURE – WORLD CURLING



# GOVERNANCE STRUCTURE – WORLD BASEBALL-SOFTBALL CONFEDERATION



**APPENDIX TWO:**

**WB REVIEW 2021**

**MNA SURVEY REPORT**

**OCTOBER 2021**

## Introduction

The vision for this project is to ensure the governance, management and operations of World Bowls are aligned to its future goals, and with best practice for international sporting federations.

The specific objectives include a detailed evaluation of:

- The strengths and weaknesses of the current governance and administrative structures;
- The strengths and weaknesses of organisational and operational performance;
- Global best practice and benchmarks – and comparisons with similar sized organisations;
- Key issues, gaps and improvements required.

This review is extensive and involves several phases of analysis, interviews, surveys and benchmarking.

This report provides a summary of the findings from an online survey with Member National Authorities (MNA's) between the 20<sup>th</sup> September and the 15<sup>th</sup> October 2021.

The survey received submissions from 37 MNA's, and responses have been aggregated and reported by region, to provide a summary of how the MNA's see World Bowls, it's performance, vision and future.



Overall Health of World Bowls	Strengths/ Working Well	Weaknesses/ Areas for Improvement	Vision for World Bowls
<ul style="list-style-type: none"> <li>• Satisfactory, but could be improved.</li> <li>• Lacking strong leadership and strategic direction.</li> <li>• Lack of commercial revenue and partnerships.</li> <li>• Has the potential to do more to grow and promote the sport.</li> <li>• Poor collaboration and sharing of information with MNA's.</li> <li>• Greater support needed for smaller and developing MNA's</li> </ul>	<ul style="list-style-type: none"> <li>• Facilitation and organisation of events and competitions.</li> <li>• Clear lines of communication to the MNA's with newsletters and minutes from Board meetings.</li> <li>• Provides international competitions and opportunities to develop the sport internationally.</li> <li>• Financial position has improved.</li> <li>• Recent reduction of fees during the pandemic was seen favourably by MNA's.</li> </ul>	<ul style="list-style-type: none"> <li>• Poor branding and positioning of the game internationally.</li> <li>• Lack of leadership and strategic direction.</li> <li>• Limited support in growing the game within smaller MNA's.</li> <li>• Lack of broadcast relationships, sponsorship, and commercial development.</li> <li>• Need for more diversified revenue streams.</li> </ul>	<ul style="list-style-type: none"> <li>• Increase the global reach of World Bowls, including the number of MNA's and bowls participants across the world.</li> <li>• Provide development programs and opportunities to new and emerging MNA's.</li> <li>• Diversify revenue streams and grow commercial opportunities including sponsorship and partnership opportunities.</li> <li>• Improve transparency around decision-making and increase collaboration with MNA's and key stakeholders.</li> </ul>

## Africa

- Weak, with declining membership.
- Still a lot of work to be done to effectively implement development plans with the support of World Bowls.

## Americas

- Very few clubs and very little participation in South America and the Caribbean regions.
- Canada is the only country with significant participant and club numbers.
- The US is a huge country and yet is very fragmented in their delivery

## Asia

- Weak and immature – bowls is still a developing sport in the region.
- Many Asian countries which do not possess enough lawn bowls facilities.

## Europe

- Declining membership of the governing bodies and declining club memberships.
- Some positives in particular areas where the sport has gained ladies clubs and members. Still more work to do to attract and develop younger player.

## Oceania

- Generally strong in spite of the Covid-19 pandemic with good relationships and support from larger members particularly Bowls New Zealand and Bowls Australia.
- Outside of Australia and New Zealand, the sport is very small and undeveloped and has the potential to grow with the right support.

# OVERALL HEALTH OF THE REGION

*"The UK game is in a similar situation to what has been described above, with declining membership of the governing bodies and declining membership of clubs. European nations come and go and more could be done to increase awareness in current European and emerging nations." – European MNA*

*"Very strong – Australia and NZ doing well. Attention to the Pacific Islands (Oceania) has a renewed focus – although most Oceania countries have bowls numbers less than an Australia / NZ bowling club – making it difficult to consolidate strategy/delivery models at International Level" – Oceania MNA*

*"As developing nations and part of the African States, we believe steps to assist us in setting out a simple but effective guide to tutor and qualify our own coaching personnel, either as an individual country or part of a scheme incorporating the African States countries would be hugely beneficial. The Vision of World Bowls should not leave the Developing Nations behind. Unfortunately, we cannot always compete in many of the World Bowls Tournaments for financial, geographical or logistical reasons, but as we work to develop our coaching and playing skills, and our country recovers from the dire effects of COVID-19, we hope we will have more opportunities to compete in World Bowls organized Tournaments in the future." – African MNA*

*"Not healthy. Canada is the only country with significant participant and club numbers. There are very few clubs and very little participation in South America and the Caribbean regions. The US is a huge country and yet is very fragmented in their delivery resulting in much lower official participation numbers than in Canada despite a much greater overall population." – American MNA*

*"Average. It's good to hear that the number of bowlers are increasing in Malaysia, Hong Kong, mainland China and India. But, at the same time, we cannot ignore the fact that there are many Asian countries which do not possess enough lawn bowls facilities." – Asian MNA*

## Africa

- Good at providing regular updates on events and programs.
- Could do more to address declining membership.
- Have great potential to improve revenue generation through strategic partnerships.
- Greater collaboration is needed amongst the Board/all Directors to secure the full support of both larger MNA's as well as the developing MNA's (who need tailor made solutions and development assistance).
- World Bowls need to focus on developing MNAs, and take intentional steps to support their individual needs. This is especially important if bowls are to achieve Olympic recognition.

## Americas

- Satisfactory, but could be improved. Recently, things have been more tumultuous with the resignation of John Bell and the COVID-19 pandemic.
- Lack of leadership and initiative to use the pandemic to provide support to MNAs or to reflect on existing strategic plans.
- Lack of synergy and support to MNA's from our 'parent' organization.
- Has missed some recent opportunities to grow and develop the sport (i.e. the 2022 Commonwealth Games).
- Typically, the only information that is widely available through WB is regarding tournaments, with little provided about policy, programs and development of all MNAs.

- Leadership and influence for the sport worldwide is coming out of Australia with the sport growing in Asia Pacific and languishing in every other region.

## Asia

- Average but not strong enough.
- Has the potential to do more to grow and promote the sport.

## Europe

- Lack of leadership, absence of strategic direction, limited policy development, total absence of emergency response during the initial Covid pandemic.
- Overly focussed on tournament management as opposed to strategic development.
- Lack of commercial revenue and partnerships.
- Internal disharmony and need for a review suggests the organisation is not in good health.

## Oceania

- Lacking strong leadership and strategic direction.
- No sense of urgency and little communication – which is all done by email.
- Lack of collaboration to leverage the expertise or knowledge that exists in the MNAs, and little if any communication with other International Sports Federations.
- Too much focus on events.

# OVERALL HEALTH OF WORLD BOWLS

*"We feel that WB, like us, faces significant challenges - the perception of our sport is not positive, participation levels globally are under threat, there's a lack of visibility for the sport and no global relationships with broadcasters, there's a lack of commercial revenue coming into WB owing to an underleveraged and unsustainable global events programme and there appears to be no clear strategy/plan to tackle all this." – European MNA*

*"Poor. It is fundamentally an event management organisation. Very little if any leadership or direction, lacking a strategic plan that has the MNAs engaged, no innovation, very little if any support of MNAs (especially the smaller ones), too much focus on events (with the CEO spending the majority of his time travelling and running events – which could be run by host MNAs). – Oceania MNA*

*"Needs improvement. The inability of World Bowls to provide innovative leadership with respect to Commonwealth Games program concerns identified by the host committee was a missed opportunity that is now haunting the 2022 program as many countries will be unable to send a full slate of athletes. Further, the lack of initiative to use the period of the pandemic to either provide leadership to MNAs or to reflect on existing strategic plans was another lost opportunity." – America's MNA*

*"From a developing nation's perspective into the WB organisation we will need more involvement to get a better insight." – Oceania MNA*

*"World Bowls have great potential to improve revenue generation through strategic partnerships, the organization needs to be mindful that the Board/all Directors should work together as a team towards a common goal, that they secure the full support of key stakeholders and this includes both the larger Member National Authorities as well as the developing Member National Authorities (who need tailor made solutions and development assistance). If bowls are to achieve Olympic recognition, World Bowls need to pay attention to developing MNAs, and take intentional steps to capacitate them and support their individual needs." – African MNA*

*"The key strength of World Bowls is the brand itself and the kudos that their flagship events bring to elite competition across the 5 continents. We have as a smaller nation successfully maintained good contacts with Directors. However there are several weaknesses of the organisation, the basic structure, the lack of leadership, absence of strategic direction, limited policy development, total absence of emergency response during the initial Covid pandemic, top heavy executive focussed on tournament management as opposed to strategic development. The emphasis on southern hemisphere centred events combined with the absence of senior European Nations to show any ownership or duty to host events being detrimental to the many smaller nations across the world bowls family." – European MNA*

*"Average but not strong enough. We believe it has potential to be more big and powerful." – Asian MNA*

*"Poor with very weak leadership and strategy, no urgency and little communication." – Oceania MNA*

## Africa

- Timely communication.
- Continuous efforts to grow the sport and ability to organise competitions and events.

## Americas

- Have started to consult with MNAs more and listened to the concerns of the MNAs by reducing the fees during the pandemic.
- The regional director has made concerted efforts to reach out to members in the region.
- Continued opportunities for international competition prior to the pandemic.

## Asia

- Good support provided to developing MNA's in Asia, made possible through the appointment of regional Directors.
- Good promotion of events and tournaments in the region.

## Europe

- Facilitation and organisation of events and competitions.
- Clear lines of communication to the MNA's with newsletters and minutes from Board meetings.

## Oceania

- Financial position has improved.
- Strong membership which provides an opportunity to grow the sport generally.

- Provides international competitions and good development of the sport internationally.
- Have access to people with strong business management skills and access to large businesses for sponsorships.
- Over the past 3-5 years World Bowls put together many events which have allowed players from all nations to aspire to the top levels of the sport and achieve their potential.

# STRENGTHS OF WORLD BOWLS



*"Inclusion of smaller developing nations into the competitive of World bowls and implementing programmes to further develop the sport in the regions." – Oceania MNA*

*"The main strength has been clear lines of communication with the MNA's through the newsletters and minutes of board meetings. It is encouraging that World Bowls is pursuing Olympic recognition." – European MNA*

*"The organisational skills and ability to co-ordinate a large number of national authorities so that each is able to comply with a world-wide standard is remarkable. Perhaps the last two to three years is not a fair time scale - the past 18 months have seen many Covid-19 restrictions affecting World Bowls events. Over the past 3-5 years World Bowls put together many events which have allowed players from all nations to aspire to the top levels of the sport and achieve their potential. Another of the strengths of World Bowls is the promoting of the sport to potential new member nations." – Oceania MNA*

*"Having Ian Howard as the Director of the Americas has been a significant improvement. He is the first Director to regularly communicate and interact... and freely offers ideas and recommendations, not just advice... Perhaps changing World Championships to every 2 years will be a strength but that is yet to be determined. The plan for promoting regional events to replace qualifying events. The website is useful. Made smart decisions regarding cancelling events sooner rather than hoping for the best and forcing late cancellations. – American MNA*

*"Long history and legacy. We appreciate recent decision to change the structure of World Championships that all countries can enter it in every two years. Because we seek to have more chance in the world event in order to send our promising bowlers more and compete with international bowlers, which must be a big promotion of bowls in Japan." – Asian MNA*

*"Events are well coordinated, and opportunities are given to both larger and developing MNAs to take part at various international competitions. However financial constraints make it difficult to participate in all events although it is appreciated that World Bowls offers some sponsorship e.g. accommodation at some tournaments like the World Bowls Indoor Championships. Timely communication with MNAs is also a strength that is appreciated." – American MNA*

## Africa

- Lack of sponsors.
- Revenue streams need to be more diversified.
- Greater focus on developing the smaller MNA's.

## Americas

- Support in growing the game within smaller MNA's.
- Lack of leadership and strategic direction.
- Little to no accountability or reporting of progress on the Strategic Plan which also does not seem to have any KPIs.
- Less focus on competitive bowling and more appreciation of all bowling members within the MNAs.

## Asia

- Lack of focus on appealing to younger generations.
- Insufficient support to the vulnerable MNA's.
- Little to no growth in the numbers of MNA's.

## Europe

- Poor branding and positioning of the game internationally.
- Too much focus on tournaments and events in the Southern hemisphere.
- Limited communication channels.
- Lack of broadcast relationships, sponsorship, and commercial development.

## Oceania

- No affiliation to the International Olympic Committee, and no opportunity to gain access to the Olympic funding models.
- Limited focus outside of the countries with money.
- Poor culture and behaviour, leading to a lack of consultation and involvement of MNAs.

# WEAKNESSES OF WORLD BOWLS

*"There is not enough support for the associations in the country's where bowls is not popular. Make a good program for this associations and help them to organise games." – European MNA*

*"World Bowls could find avenues to improve revenue generation so that more financial support is given to developing nations who are struggling to improve technical skills as well as honour attendance at international competitions. Funding is always an issue and positive consideration for funding of any worthy or proven project we may present would be a great incentive. We accept that we have to contribute to be an attribute to our game but we are sure to require guidance and assistance to achieve that. At the earliest opportunity, if World Bowls could formulate a programme for us to greatly improve and develop our basic technical skills and playing ability, we believe that would be a wonderful achievement, and a good step forward in showing the world that the smaller nations do have a plethora of bowling talent which we just have to discover and nurture." – African MNA*

*"WB has long failed to increase the number of MNAs. The less famous lawn bowls is in the world, the more difficult we introduce and promote the sport, along with getting money to do it, in the country where it's unknown. We understand that methods to boost the sport must be different between the established countries (e.g. UK, Australia, NZ) and vulnerable ones (e.g. Japan). WB should focus on the consideration of the appropriate idea and plan as well as support both technically and financially, to promote bowls in some promising countries. We hope, for example, that the travel cost for young bowlers (e.g. U25) to take part in the World Champs would be paid by WB because small MNA cannot afford it and the bowlers have to pay at their own expense." – Asian MNA*

*"Culture/Behaviour – over the past 10 years, there has been an old "Boys Club" culture at World Bowls, which has led to very weak connections with most MNAs and in some cases, very adversarial relationships with key MNA's. – Oceania MNA*

*"World Bowls needs to facilitate regional relationships and communications, especially with developing MNAs. Too much concentration of activities around Australia and New Zealand. The focus on Bowls Australia over other smaller MNAs will be detrimental in the long run if we want to grow this sport for consideration for the Olympics. World Bowls has become a "caretaker" organization. It needs to become a leadership organization and guide changes that result in greater general awareness and participation in our sport. Need World Bowls to assist other potential MNAs that need their support in developing their sport and membership. Less focus on competitive bowling and overall appreciation of all bowling members within the MNAs." – American MNA*

*"The lack of communication and support of smaller MNA'S whether developmentally or financially, the bias towards Southern Hemisphere elite competitions places a burden on smaller nations which have to self fund all aspects of attending these competitions often to detriment of nations where some players are financially unable to enter. Key areas upon which to focus improvement include promotion of grass roots involvement , equitable rotation of hosting international elite events and greater devolution, organisation and management of regional competitions to minimise travel and expense." – European MNA*

# TOP INITIATIVES OUT OF THIS REVIEW



## Africa

- Increase sponsorship opportunities.
- Investigate shorter formats of the game to promote the sport to, and engage with, young people.
- Enhance governance and structure.
- Enhance sharing of information and facilitate better collaboration between all MNA's.

## Americas

- Greater funding and support for developing nations.
- Identify and promote different game and competition formats to grow the sport.
- Improve communications and investigate new communications platforms.
- Provide greater leadership, strategic direction and collaboration with members, stakeholders and partners.

## Asia

- Enhanced marketing, promotion and social media presence.
- Improved transparency around decision-making.
- Increase the number of MNA's.
- Greater availability of coaching, umpiring and educational content.

## Europe

- Improved marketing and promotion.

- Greater focus on events, sponsorship and commercial outcomes.
- Greater communication using a broader range of technology platforms (not just email).
- In-depth skills assessment of Board and staff linked directly to a Strategic Plan.
- Olympic recognition.

## Oceania

- Develop a new Strategic Plan.
- Develop a commercially appealing product to enhance sponsorship and events opportunities (i.e. short format bowls league).
- Develop a clear plan and roadmap for bowls to be an Olympic sport in 2032.
- Identify clear focus areas for each region.
- Provide leadership, mentoring and support to grow the sport.

# TOP INITIATIVES OUT OF THIS REVIEW



- *"WB should identify an underserved demographic that could be the focus of recruitment worldwide.*
- *Develop bowls as a sport that is not limited by weather/climate and space.*
- *Promoting bowls in different formats - short mat, and on greens that are smaller than regulation. In the US and other countries with seasons, golf clubs or parks might be willing to support bowls if they weren't expected to put in a regulation green. Promoting the sport on any available space would increase exposure to the sport, increase locations and membership.*
- *Improved communications by WB about topics other than tournament outcomes.*
- *Revamp the coaching curriculum from simply "starting" bowlers to include elevating bowlers to competition levels." – American MNA*

- *"Updated board structure that is diverse and skills based and an accountable strategic plan with measurable key performance indicators*
- *Alignment with other bowls international federations (e.g. IBD, Short Mat, IBBA, etc.)*
- *An organization that provides innovative leadership for its members (e.g. World Netball, Rugby, Curling)*
- *Implement risk management process that allows for the organization to identify and predict upcoming risks (e.g. Commonwealth Games reduction was identified as a risk within individual MNAs years ago and yet seems to have been missed by World Bowls)*
- *Creation of a formal WB platform that allows MNAs to share best practices with each other in real time and learn from each other's challenges and successes. " – American MNA*

- *"World Bowls are sometimes by-standers where the developing MNAs are struggling for various reasons, it is recommended that the Board intentionally and actively do more to assist and retain all member states, e.g. Swaziland, Malawi & Papua New Guinea.*
- *Encourage larger MNAs to give more opportunities to developing nations to play in Nations Tours/invitational tournaments, give them exposure outside major international competitions so that they improve performances.*
- *World Bowls to help channel technical resources and professional expertise to developing countries through the cooperation and collaboration of various key stakeholders like Embassies and High Commissions." – African MNA*

- *"Complete overhaul of articles, finance, and governance*
- *In-depth skills assessment of Board and staff linked directly to a strategic plan*
- *Fuller collaboration enabling joint decisions with members nations on the future of the sport." – European MNA*

- *"Refresh World Bowls – appoint a new CEO, create a new Strategic Plan – with a new Vision, new Logo, new Brand.*
- *Refine the Board structure and recruit more dynamic Board Directors and create more strategic working parties involving MNA personnel*
- *Create a communications plan to re-connect with MNAs which would include undertaking more meetings virtually with MNAs" – Oceania MNA*

## Africa

- Intentionally and actively do more to assist and retain all member states.
- Encourage larger MNAs to give more opportunities to developing nations.
- Increase sponsorship and promotion of the health benefits that bowls provides.

## Americas

- Push to be an Olympic sport.
- Increased focus on marketing, sponsorship and promotion.

## Asia

- Provide development programs and opportunities to new and emerging MNA's.
- To have an active presence and partnership with all MNA's.
- Increase promotion of bowls to younger generations.

## Europe

- Prioritise junior development, especially in smaller MNA's.
- IOC recognition and more member countries playing.
- Introduction of shorter game formats.

## Oceania

- Increase the global reach of World Bowls, including the number of MNA's and participants across the world.

- Unlock the talent and innovation that resides in its member countries.
- Increase its relevance to its members.

*"Vision - Bowls is recognised and played in more countries across the World.*

- 1. Grow the membership of World Bowls – we need to expand the sport in more countries across the world.*
- 2. Stage events that derive more commercially positive results and utilise broadcast.*
- 3. Explore all possibilities to achieve Olympic and/or Paralympic status at the 2032 Olympics.*
- 4. Create new programs/products to introduce more formal and informal participants, coaches, officials, administrators to the sport e.g. creating a shorter version of the sport to attract more participants." – Oceania MNA*

*"Vision - Bowls.... A truly global sport." – Oceania MNA*

*"Motivate, Inspire and Transform. Reflect on World Bowls core values, acknowledge its rich cultural diversity that will bring benefits to the game and organization in the future." – Oceania MNA*

*"Would like to see a collaborative process that brings MNAs together virtually to explore and align on a vision, mission and values for the organization. This could be achieved virtually in small group sessions based on time zones. This type of process would elicit buy-in amongst a global community and create synergy that would allow World Bowls to draw on the skills, strength and diversity of its members." – American MNA*

*"World Bowls are sometimes by-standers where the developing MNAs are struggling for various reasons, it is recommended that the Board intentionally and actively do more to assist and retain all member states, e.g. Swaziland, Malawi & Papua New Guinea.*

*Encourage larger MNAs to give more opportunities to developing nations to play in Nations Tours/invitational tournaments, give them exposure outside major international competitions so that they improve performances. World Bowls to help channel technical resources and professional expertise to developing countries through the cooperation and collaboration of various key stakeholders like Embassies and High Commissions." – African MNA*

*"The lack of communication and support of smaller MNA'S whether developmentally or financially, the bias towards Southern Hemisphere elite competitions places a burden on smaller nations which have to self fund all aspects of attending these competitions often to detriment of nations where some players are financially unable to enter. Key areas upon which to focus improvement include promotion of grass roots involvement , equitable rotation of hosting international elite events and greater devolution, organisation and management of regional competitions to minimise travel and expense." – European MNA*

*"I believe the Vision should focus on getting this sport more attention with marketing and advertising initiatives, national and international sponsorships and sharing best practices with all MNAs. We need to focus on attracting all different ages (more younger players), other nationalities, etc., to participate in playing the sport of bowls and retaining these players/members... Growing the sport is the obvious goal, but achieve this greatly by improving visibility through televised events and eventually getting it into the Olympics. Within the next 10 years, we would like to see the sport of bowls be an Olympic sport.." – American MNA*

**SURVEY RESPONDENTS**

## Africa

1. Botswana
2. Kenya
3. Namibia
4. South Africa
5. Zimbabwe

## Americas

1. Argentina
2. Canada
3. Jamaica
4. USA

## Asia

1. Japan
2. Hong Kong
3. Macao
4. Malaysia
5. Philippines
6. Singapore
7. Thailand

## Europe

1. Scotland
2. Isle of Man
3. Spain
4. Guernsey
5. Netherlands
6. Israel
7. England
8. Wales
9. Irish
10. Cyprus
11. Switzerland
12. Portugal
13. Malta
14. Czech

## Oceania

1. Bowls Australia
2. Bowls New Zealand
3. Cook Islands Bowls
4. Norfolk Island Bowls Council
5. Bowls Fiji
6. Tonga L.B

## International

1. International Indoor Bowls Council

**APPENDIX THREE:**

**WB REVIEW 2021**

**BOARD AND STAFF DE-BRIEF SURVEY REPORT  
OCTOBER 2021**

## Introduction

The vision for this project is to ensure the governance, management and operations of World Bowls are aligned to its future goals, and with best practice for international sporting federations.

The specific objectives include a detailed evaluation of :

- The strengths and weaknesses of the current governance and administrative structures;
- The strengths and weaknesses of organisational and operational performance;
- Global best practice and benchmarks – and comparisons with similar sized organisations;
- Key issues, gaps and improvements required.

The outcomes will be clear findings, recommendations and rationale relating to:

- Practical and pragmatic improvements across key areas such as:
  - Governance and systems
  - Administration and operations
  - Finances and revenue streams
  - Sponsorship, marketing and communications
  - Events and game development
- A high-level road map and implementation plan for (with key timeframes, accountabilities, etc.).

This review is extensive and involves several phases of analysis, interviews, surveys and benchmarking. This de-brief report is included to show where the Board/Staff are at in terms of how they see World Bowls, it's performance, vision and future.

## Key Findings

- The overall consensus would be that even with the challenges of COVID, the game has been struggling in many countries – that said, there are some shoots of promise primarily in the area of ‘casual participation’ – which is non-member-based play.
- And while there are some nuances by country and region – there is a need for the sport to focus on a greater level of inclusion, whether that be for females, indigenous populations, non-Caucasian and other non-Anglo groups.
- While not shown below, the potential for growth of the game in Asia, is there – but much of it will come from building a greater profile and attracting investment in the sport in both current growth regions.

## Scotland/GB

***“Struggling badly for many years with a reducing and declining club membership. Currently in Scotland there are 845 clubs - 20 years ago there were 919 clubs. Current membership is 39637 men and 15636 women. 20 years ago, there were in excess of 72000 men and 49895 women. Covid-19 will not help, and the expectation is that numbers will fall. In my own club, current total membership is about 120 - 20 years ago it was 364. the statistics tell their own story of a declining participation. there are many reasons for this”***

***“Struggling badly - in this region, we are no different from many others”.***

***“Declining/Declining”***

## Wales/GB

***“In terms of clubs, some have not re-opened as a result of COVID, whilst others have gained new members, especially with bowls being seen as a safe outdoor sport. In general as a sport, numbers are on the decline. In respect of governance then Wales outdoor bowls is going through a unification process and this is proving a challenge.”***

***“Similar to (the) overall Wales numbers”.***

## Australia/Oceania

*“Strong - growing participation (non-member based).”*

*“Strong - popular sport in an older demographic.”*

## NZ/Oceania

*“Mixed depending on the demographics and region”*

*“Holding its own in a difficult Covid environment”*

*“Mixed, there is a big difference between Australia, New Zealand and Norfolk Island, and the rest of the region.”*

*“Again (across the region) maintaining good membership and participation numbers in difficult times.”*

## Guernsey

*“Good overall”*

*“Also ‘good’ in the region”*

## Zambia/Africa

*“Numbers declining dramatically - large portion of the black population have no access to the sport.”*

*“Same - overall (declining) trend across all regions”.*

## HK/Asia

*“Good, lawn bowls is growing with power in my country.”*

*“Overall is good but the level and pace of development varies.”*

## The Americas

*“Club bowler membership growth is at best - static. Provincial and National administration of clubs and tournaments is strong  
Three of the current 6 nations that make up the region are playing the Commonwealth Games. Three are not eligible.  
General public perception is that Bowls can certainly be played by all ages, but overall, it is considered an old person's sport.  
Bowls in the USA needs a new modern day administration structure, including a paid CEO. Bowls Canada is well managed in every area.  
Brazil, Argentina Jamaica, need a major infusion of development funds to get the solid base of enthusiastic bowlers motivated to grow bowls. The potential is only limited by marketing funds.”*

While there is recognition that the organisation has done what it can with limited financial resources and with limited people, there is a strong desire that it needs to change and elevate: And this can be done by:

- Re-establishing its Vision
- Determining a clear and simple strategy
- Becoming much more externally focused
- Partnering with like-minded organisations
- Helping the smaller nations and potential growth areas (share intel, programs and resources)

***“Overall, the basics that support competition play are sound. Could more be done, of course. The future of any - and all sport federations depends on the vitality of its existing national sports authorities. World bowls health for what it does with its limited financial resources, lack of staff is about what one can expect. Can better more robust health be attained, yes. To improve the “health” of WB a clear picture/vision of the future needs to be stated.”***

***“I would say very good as the recognised body world-wide for the sport of bowls although I know some of the bigger Members will not agree. It is not the primary function of WB to recruit members for clubs - that is primarily the responsibility of the individual clubs with assistance and guidance from their National Association if required. WB has grown since its inception from about 34 members to currently 54. It is efficient, now financially sound and carries out its role efficiently”.***

***“Healthy in terms of continuing to meet the objective of globalising the sport. When World Bowls was incorporated 20 years ago there were 36 member nations and there are now over 50 member nations. Stable but currently under-resourced to be able to progress effectively all World Bowls would like to achieve in terms of development of the sport.”***

***“The organisation is outdated and needs to modernise in line with other World sporting organisations. We are behind in terms of: embracing the latest technology, communication methods and frequency to members, communication and reporting practices to Board members, strategic planning and vision, gender equality and lots more. We are not operating as a ‘World’ organisation.”***  
***“Mediocre at present”***

***“It is in poor health, strategically, financially and operationally”.***

***“Appears to be static - nothing new for quite a few years.”***

***“Not as good as it should be, sometimes they are just too conservative and not willing to catch up with the new world”.***

***“World Bowls is ‘treading water’. It needs to work more closely with other International Federations and with other multi-sport organisations e.g. CGF, IOC and its focus needs to be more external rather than internally events focused. The Organisation needs financial support and therefore a complete strategic re-think is needed that focuses on key partnerships and promotion”.***

While the Board and Staff agree that COVID has been difficult, some of the more recent positive achievements and aspects of the organisation include:

- Has worked effectively with WADA
- Its relationship with CGF is sound
- World events calendar and event management (non-COVID periods)
- Established manufacturer relationships
- International official appointments
- Stable financials
- The Bowls knowledge in the organisation
- Recent/new Board appointments
- Our history – and MNA member growth over 20 years

***“Prior to covid I think WB has worked effectively with WADA and the Commonwealth Games organization and steered a steady organization given all the circumstances.”***

***“Turned round its financial position to become healthy. Increased membership. Communicates well with its members. Runs world events well. CEO has sound knowledge of many different aspects connected to world bowls - eg WADA issues, IOC and GAISF dealings, Manufacturers and testers, artificial surfaces. Almost all enquiries are dealt with immediately and communications are good. Has a very good control and organisation for appointing international officials for major events”.***

***“Financially stable, highly experienced and efficient staff. Financial management including financial forecasting is strong. Events management is strong. Office operational requirements are strong including headquarters communications with all those communicating with World Bowls. Production of revised Development Strategy.”***

***Undertaking general and pandemic surveys and a review of World Bowls events. Launch of the Global Marketing Initiative. Excellent relationship with the CGF and willingness to embrace changes to playing formats and other aspects to present the sport to a global audience not just those who play the game now”.***

***“The staff we have are extremely knowledgeable. We have met with MNAs for the first time via a virtual platform to discuss events. There have been some positive appointments of pro-active directors”.***

***“Strong event focus continues, subject to Covid restrictions – and maintained position with Commonwealth Games Federation and seen as a key core sport.”***

***“The strength is they still get the support from the majority of their members. To be honest nothing much has been done in the past 2-3 years, just busy fighting off the impact of COVID-19.”***

# WORLD BOWLS WEAKNESSES / KEY IMPROVEMENT AREA



While some can be critical of World Bowls, much of the criticism is based on the small nature of the team and the lack of resources – and there are those that suggest much has not changed in recent years. That said, there is recognition that COVID has made things difficult – but as countries start to get back to some level of normality, there will be expectation on gaining traction and improving on:

- Lack of resources/revenue streams
- Lack of commercial agreements/sponsorships
- Communication blockages (some will say too much or an over reliance of email)
- Communication through/across/between MNAs and regional directors
- Lack of perceived value for money by some MNA's
- Lack of technology use/applications
- Lack of a 'real global profile'

***“Lack of funds prevents dynamic marketing of the sport. If bowls are to attain Olympic Games recognition it needs to increase the general public's interest in following the sport.”***

***“Efforts to obtain sponsorship for events and advertising revenue has failed over the years despite many different efforts internally and externally”.***

***“Attracting other income streams including sponsorship. Truly effective and regular communications between Regional Directors and the MNAs in their Region. An honest and true appreciation of the operational requirements of CEO and his assistant. Compliance with CEO/Board Linkage Policies. Lack of an effective system for assessing Directors' performance. Appreciation of major MNAs that their annual affiliation fees are actually a tiny amount of less than 50pence per year per registered member per year”.***

***“Our staff do not appear to be up to date with modern management and governance practices, modern technology and communication skills and are seemingly reluctant to change. There is a lack of vision and direction and maximising of opportunities. The structure of the Board may not be the best for where we want to be e.g., Regional Directors - is this the best way forward? We don't network well with both members, other organisations – and we don't keep up to date with world challenges and how can bowls improve.”***

***“Limited resources, and shrinking due to Covid fee relief measures, (we have) limited development strategies and the reality is that the leadership is weak and lacking initiative.”***

# WORLD BOWLS WEAKNESSES / KEY IMPROVEMENTS

*"It needs a complete overhaul. It is poorly funded, not very digital, not engaged well with other sports stakeholders and key potential partners, e.g. disabled orgs and is not respected by key national associations and almost irrelevant to others."*

*"Marketing, promotion, governance, communication."*

*"The weakness is their (our) unwillingness of accepting new ideas and lack of communications with its members. They (we) need to work with a younger generation of bowlers for new ideas and make investment in public relations".*

*"The Organisation is under-resourced (both in personnel and funding). It needs a far greater international presence, and the sport needs to be seen globally in all forms of media, not just a focus on an internal audience e.g., many of the MNA's have developed streaming facilities but these are in the main watched by their own existing members or members from other MNA's. The sport is seldom seen in the mainstream media channels except when it is part of a multi-sport event such as Commonwealth Games every 4 years".*



While it is early days in the review process, some of the more prominent thoughts to date include:

- Getting the strategy right
- Increasing revenues/revenue streams
- A global event/tour/fast format
- Outsourcing some components (i.e.. Commercial/marketing)
- Review of Board remits (i.e. getting the governance and operational balance right in a small organisation)
- Articles/Constitutional Review/Recommendations
- Succession planning
- Improve the communication – up, down and across
- Website, technology and digital investment
- Partnering with MNAs on shared services and IP
- A Hall of Fame

***“1. Additional head office executives/specialists.***

***2. World Tour***

***3. Celebrate our champions via a Hall of Fame. a sport that does not celebrate its champions does not respect itself is disrespectful to the people who have given to keep the game exciting.”***

***“Formation of a realistic attainable strategic plan.***

***Drive forward for sponsorship and advertising revenue.***

***Getting the proper Directors elected who have proven backgrounds.”***

***“A much clearer medium to long term strategy for the sport overall. Clear targets for where the sport wants to be seen in say ten years time, for example including in terms of inclusivity and diversity.***

***Appointment of a Marketing & Sponsorship Company to put the requirements in relation to progressing other income streams in the hands of those most qualified in this area, this should not be an operational/headquarters staff responsibility. Review of CEO/Board linkage policies. Fully effective and regular communications systems to be truly established between Regional Directors and their regional MNAs. Better adherence to the existing policy for the Board (i.e. the directors) to annually assess their own performance.***

***Review of the Articles of Association particularly in relation to directors terms of office and rotation of directors.”***

***“Modern Governance; Forward thinking Strategic and Operational plan; Overhaul of current structure; An organisation that our members know about and can contribute too”***

***“New Board structure / New CEO position description / Review of WB HQ / Recommendations in regard to possible staffing improvements i.e., new positions in marketing, finance and sponsorship”***

***“Target market focus; Digitisation; Participation at the Olympics (new) and Commonwealth Games (retained); Infrastructure development in the Third World”***

***“1. Review the staff levels and look to increase enabling the office to do more***

***2. Review the roles of directors, as some of the regional directors are not as business savvy as others, create new areas, finance, development etc.***

***3. Focus on Marketing and Promotion, with employing new staff(s) with set goals***

***4. Review events and budgets, ensuring funding is directed more into promotion than running events,***

***5. Governance, looks to create better frameworks and upskill the current staff to enable them to produce modern documents.”***

***“Is the board fit for purpose in the modern era? Is the CEO fit for purpose in the modern era?***

***World bowls events to be revamped; Multiple revenue streams for WB as opposed to relying solely on affiliation fees.***

***Players committee or board representation; Captains forum.”***

***“Skills-based governance; Partnerships with other IF's and Multi-Sport Federations; Sufficient skilled staff with a focus on growth and raising funds.”***



While there is much to play out in this review, we will let you digest these for future consideration...

***“The Dream: To have bowls played in 100 nations.  
The Vision: to achieve the dream, Bowls needs to think carefully about parting with tradition and bringing into the sport, new playing formats ( world super league is an example, and so is length of play, new financial streams and new enthusiasm for engaging with youth championships, example maybe WB could establish a youth division staffed expressly for the purpose of growing bowls via all the things youth and maybe there could be a way to create its own budget “***

***“Increased club membership at a local level.  
Membership of IOC.***

***Vision need not be much different from the current one :-  
To be recognised as a modern, progressive and effective International Federation to globally govern, promote, foster and develop the sport of Bowls.”***

***“To promote Bowls as truly a sport for all also highlighting the social and health benefits of the sport and continue to be recognised as a respected, modern, progressive, effective and fully inclusive International Federation to govern and develop the sport.  
World Bowls needs to continue to progress recognition by IOC/IPC and be a sport on the sports programme at the Olympic Games and Paralympic Games in Brisbane in 2032 and remain on the sports programme at the Commonwealth Games.”***

***“To become a recognised World Organisation that bowlers and non bowlers know about. To lead the way for our sport in terms of all codes of the game, in terms of all genders and in terms of being fully inclusive.”***

***“Maintain a position as a core sport for Commonwealth Games / examine Olympic recognition / increase membership in terms of participation and MNA numbers / Use the considerable resources of larger MNA's to assist with Regional development”***

***“To cement ourselves as the game for all ages and peoples globally. Highlight our diversity.”***

***“Create a very strong brand, marketing the sport globally and encourage more member countries. “***

***“Focus on the growth of member Nations so that the sport is included within the key International Organisations i.e. IOC and receives the benefits that flow from that connection. “***

***“Big opportunities to grow the sport of this very low base esp in China / India / USA etc. exactly what has happened to amateur golf / netball etc.  
The simple proof of success is the growth or lack thereof in the playing numbers.”***

***“The vision is to make sure lawn bowls become, or continue to become, the sport for all. In 10 years time there should be more member nations and more people get engaged with the sport around the world.”***

**FEEDBACK ON SPECIFIC AREAS**

## Governance and Structure

- More realistic strategic plans
- Improved Director terms/rotations
- More defined roles for directors
- Move towards a skills-based board
- Bed down the strategy then look at governance
- Succession planning
- Improved revenues and income streams

***"More realistic future strategic plans taking into account the available resources and financial situation."***

***"Compliance with established policies. Certain Articles require to be amended e.g. directors' terms of office and ensuring all directors cannot be voted off the Board at the same time. Better gender and inclusivity balance on the Board. Stronger communications systems at Regional level. The specialist area of Marketing and Sponsorship/Commercial income requires to an arrangement to be handled by a specialist company."***

***"A whole new up to date approach with skilled staff in place. A forward thinking strategic and operational plan - forward thinking. (Improved) Value for money for our members in terms of their World Governing Body"***

***"Revised Board structure - staggered membership terms / review CEO role / skills-based Board if possible."***

***"I think corporate governance is good enough. For the structure they need to introduce some functional roles, in addition to the current roles that was only based on geographic coverage."***

***"A clear structure with more directors/staff having areas of improvement to focus on, like marketing, development, promotion etc."***

***"I think governance and structure should follow a clearly defined strategy which has the buy-in of member national associations. That can ensure the right resources and focus are on the initiatives which can make the greatest difference, e.g. Olympic participation, demographic focus, commercial partnerships, digitisation, infrastructure strategy, playing formats. This should be accompanied by a more structured approach to governance, clearer responsibilities and accountabilities, succession planning, and learning and development for existing and future Board members and staff."***

***"I think the biggest change that could be made is for a skills-based Board with a focus on strategy and development. The current Board is made up of representatives from MNA's and therefore all come with a MNA background and not a corporate background. The CEO must drive the way forward and should not have an events focus at all. World Bowls could have a Events Operations Committee or an Operations Committee that runs the nuts and bolts of the Operation, but the CEO must be totally focused on growth. The Organisation has to find other forms of income. It is understaffed which means that the CEO and the one other part time staff Member are totally focused on the nuts and bolts. That has to change."***

## Administration and Operations

The main areas for improvement across admin and operations include:

- Consideration for additional resources/people
- Better/improved technology for staff/operations
- Media/marketing personnel
- Website upgrade/improvements

***“There is a need is for at least one marketing executive or a PR firm with an emphasis on paid development executives to go into nations that are not WB members - and this team with the CEO need to work out how to promote the sport.”***

***“I consider that administrative and operational matters are currently effectively handled. Adherence is required to Board/CEO linkage policies to avoid a repeat of past unnecessary clashes and to minimise interference in operational matters by certain board members allowing them to concentrate on meeting their duties, especially those with Regional Director duties, whilst also appreciating their overall duties as directors of the company. Greater level of appreciation to be shown for the work undertaken at all hours by operational/administration staff. Better/improved respect for experience and consideration of reward for long hours on occasions. ”***

***“Upskilled personnel. More up to date technology and systems being used. Regular contact with National Member Authorities. A review of current salary scales, contracts and job description - is it fit for purpose - are we getting value for money? Media/marketing person. Look at gender equality in both the Board and across our practices. Become a more inclusive organisation”***

***“Possible relocation of HQ / CEO role to be reviewed. Shared service concepts considered.”***

***“Complete modernisation and digitisation. This could include using proper board management system including document management, improved website, social media presence, Trbyz type community portal. Use of interns and national association secondees. Need much closer relationship with other lawn bowls codes including potential amalgamation to maximise opportunities, and needs strategic relationships with organisations to present a unified presence, and strategic relationships with bocci, pentaque, disabled etc. Consider relocation to countries where World Bowls can leverage location and develop the game, e.g. Dubai or Abu Dhabi, with potential indoor and facilities used for all World Bowls indoor events.”***

***“More staff, outsource some of the functions - for example, a director of finance, director of events, director of development, so staff can focus on marketing and promotion.”***

***“We need other sources of revenue in our to mitigate our small team and limited resources.”***

***“Currently completely understaffed. Events administration could be handled by an Events Committee or contracted to MNA's for delivery. Financial management could be handled by a clerk employed to do this and other clerical duties.”***

## Revenue Streams/Sponsorship

While 'revenues and sponsorship' can be a wish list area, as a starting list there are some interesting ideas that can be further explored through some of the larger MNAs – or through outsourcing some components...key suggestions from the Board and staff included:

- Sponsorship offers/packages
- A review of affiliation fees
- Disability/Inclusion offers and options
- Streaming/video resources
- Licensing opportunities
- Wellness trends and opportunities
- Exploration of new NGO partnerships

***“Looking at other bowling organisations that do not come under World Bowls to attract more members, options for TV rights – and review our events we have now.”***

***“Affiliation fees, which at present are still small when generally standing at less than 50 pence per year per registered member must remain at a level as a guaranteed income stream for World Bowls – in addition manufacturers and testers annual licence fees and annual fees for approval of synthetic bowling green surfaces. Other improved income streams are required including sponsorship and advertising but historically have been difficult to achieve.”***

***“Look at the creation of a commercial or second office in Australia, where there are opportunities for sponsors, at the moment there is no/limited opportunities in Scotland.”***

***“We are a niche target sport and we have the opportunity to focus on demographics we can own including an aging population, disabled athletes of all ages, LGBTQ, as a 'Game for All Ages and People'.***

- 1. International sponsors in the key demographics, e.g. Age Care, Health, Disabled etc.***
- 2. Video on demand platform with advertising opportunities***
- 3. Physical and mental health guides for participants, followed by coaching and learning opportunities***
- 4. Global database and research capability***
- 5. Brand licensing including merchandise, health products, bowls***
- 6. Work with WHO, UN and other NGOs around wellness initiatives for older populations in 3rd world countries (via bowls)***
- 7. International affiliation fees”***

## Revenue Streams/Sponsorship (Cont.)...

*"Should the focus be the income on sponsorship, rather than just relying on the membership fees?"*

*"The biggest challenge has been the same since World Bowls commenced operating over 20 years ago. There is no income stream from a commercial focus and the fees from affiliation fees and bowls manufacturers have remained the only income streams for that whole period. That has to change."*

*"This whole area requires to be put in the hands of experts in this field i.e. WB needs a financially viable partnership or arrangement with a Marketing & Sponsorship Company. It has been tried before totally unsuccessfully. Past Appointed Directors brought onto the Board with specific responsibilities in this area also failed to produce."*

*"With a new modern organisation and skilled staff in this area, I would hope to see these opportunities coming to World Bowls. Advertising and maximise our current branding."*

*"A marketing role / sourcing new sponsorship, with possible assistance from key MNA's."*



## Events

Ideas and decisions around events will ultimately come down to those concepts or events with the best chance for success – and where the return of investment will be meaningful. That said, we will need to incorporate the recent WB Events Review into our work, which has only just been shared with our team.

The Board and staff suggested the following new events to explore:

- Completing the review from earlier this year involving the major MNA's
- A super league (where TV and sponsors pay for the content)
- More events in the Northern hemisphere
- An Olympics pitch
- World Masters events/games
  - The key points being they must return money to World Bowls

***“Possibly super league from each region financed by sponsors/WB ”***

***“Not much change needed in this area but there should be a move to have the Northern Hemisphere members bid for and hold events. Most are currently held in Australia and many countries simply can't afford the travel costs involved.”***

***“World Bowls completed a full review of World Bowls events early this year following a comprehensive consultation process and issued its recommendations as a result. The consultation process was greatly appreciated by the range of MNAs and international bodies involved and the resulting decision to change the four yearly World Bowls Championships has been well received. The ongoing effects on WB & MNAs resulting from the global pandemic will no doubt be considerations in relation to progressing certain of the other events recommendations.”***

***“World Bowls has just completed an overview of events involving major MNAs - this feedback now needs to be taken into account. Look at costings by event, Look at participation, Look at expenditure and value for money. (This includes) event personnel - this does not have to be the CEO. And maximising opportunities for networking at events – pre-planning.”***

***“Consider the budgets for each event carefully, does WB need to fund the World Champion of Champions as a tier-2 or 3 event? make the events quicker events with more groups saving costs for everyone”***

***“They are run ok. World Bowls event is bland - lack of interest from tv and in house spectators alike.”***

## Events (Cont.)...

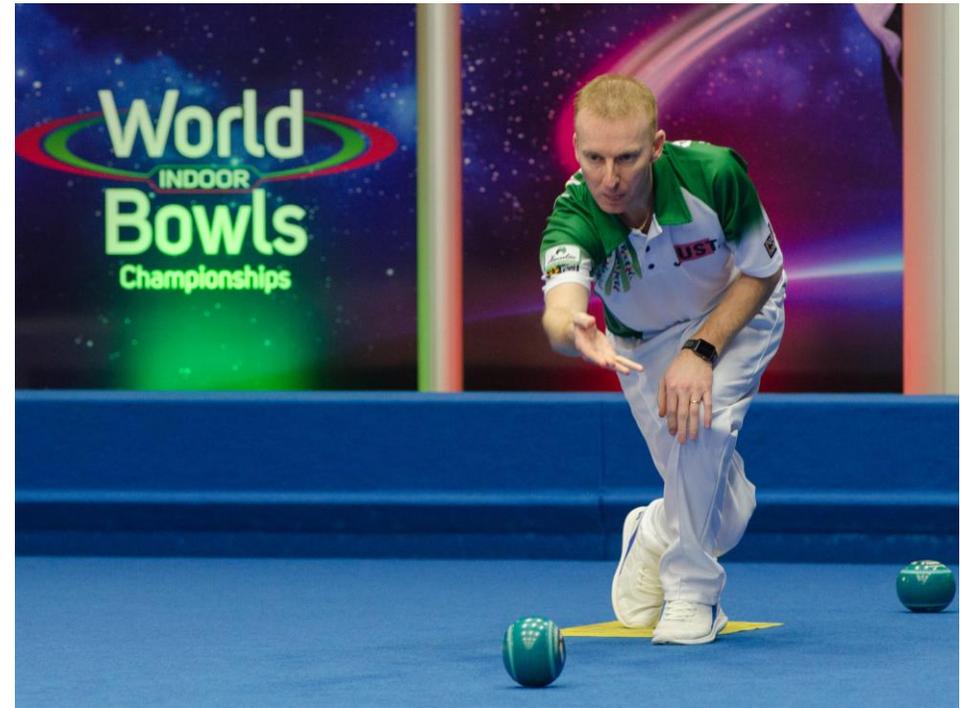
*“Greater involvement of Regional Directors in organising and managing events / greater interest from more MNA's to host / more Regional championships.”*

*“Olympics must be a priority particularly Paralympics*

- *Maintain Commonwealth Games presence*
- *World Masters games presence*
- *Develop relevant regional events with Paralympics and masters competitions*
- *Indoor events in partnership with World Bowls Tour*
- *Potential LGBTQ events*
- *Mass participation global events utilising virtual technology (happy to explain)*
- *Expansion of UBC to be global”*

*“Changing the World Championship to every two years is on the right track.”*

*“Most of the WB events can be delegated to MNA's for management. Probably too many events of little value to attract a wider audience.”*



## Game Development

While there is an argument that it is difficult for WB to be involved in development programs or development of the game globally due to resource constraints, it can play a role in sharing resources and IP from various MNA's around products, services, shared services and the like. Some of the ideas that were suggested by the Board and staff include:

- Shorter, faster events, games and formats
- More social games
- More inclusive offers
- More formats for synthetic greens
- Sharing of resources (coaching and officiating)
- Sharing of 'gold nuggets' – from around the world (those products and services that had had great success)

*"This is a difficult area for the 'traditionalists' as change is difficult for them. A lot has been done over recent years at the top level to present the sport in a more attractive manner with shorter formats of play like sets play, substitutes during play, team coloured bowls. However, introducing changes especially at national or even club level where so many existing members are happy to carry on playing the way they have always played the game is more difficult. Another problem is the generally advanced age of the spectators compared to the generally lot younger top players. Overall the game needs to develop to be as inclusive as possible and as attractive to a far wider audience than just those who play the game now. Balancing game formats to please the traditionalists and to meet the requirements of inclusivity and attracting a wider participation and audience is not an easy task. There are also too many areas where the game is not attracting enough of the local population e.g. the sport generally being played by British ex-pat communities in Spain and Portugal or particularly issues in developing the sport for the ethnic majorities in the African nations."*

*"New play formats, that address shorter faster bigger better fun events."*

*"Difficult - we are stuck in a time warp. Changes don't come easy. "*

*"Sharing of existing coaching resources and programs for players, coaches and officials"*

*"Look at modernising the game - short sharper formats. Listen to our members, continue to involve our members."*

*"Clear strategies for Third World, aging population, youth, LGBTQ and disabled Artificial and covered/indoor greens to replace grass surfaces"*

*"Make MNAs take up the 3-bowls pairs and 2-bowls triples game more as the new standard of games."*

*"This will vary dramatically from region to region - not a case of one size fits all."*

*"Should look for ways to cut down the duration of each game, and each competition."*

*"World Bowls should support MNA's in this area. They should stay out of recruitment but should be continually looking at updating game formats that are more attractive to a new demographic."*

***"Turning around organisations requires risk, the placing of small bets on new initiatives is strategic, most all ideas have merit, but due to many unforeseen circumstances it's possible for good ideas to get whacked. Revitalising an organization that has not changed all too much in decades upon decades will be tough. Nimbleness will be required by all. To get the right governance structure, the right marketing and PR executives, and the best way to improve funding... will require patience and a bit of good luck."***

***"Playing Devil's Advocate - given the current (lack of) resources should WB be more than a body which simply stages events, monitors the technical aspects of the game i.e., umpiring and officiating, laws of the game, equipment standards and relies on the skills and resources of key MNA's to provide other services in the areas of game development?"***

***"This is the chance to reset our sport and make World Bowls relevant."***

***"The organisation cannot continue as a one-man band, new modern staff who can market and promote the sport accordingly should be employed, development sits with regional directors (who are volunteers) should be done by full-time staff and directors should focus on finance, events, governance etc., which is important, but can be done by volunteers as not needed to be full time."***

***"We as a board are very excited about this review and hope that something dramatic and useful will come out of it !!"***

***"To my knowledge, this is the 4th or 5th review that the sport has undertaken since the 1990s. All of those reviews have recommended changes that would result in membership growth, financial growth, and greater media coverage. Nothing has changed in my view ( other than the deckchairs). This exercise must result in a way forward that has clear KPI's and targets and is supported and initially funded by the MNA's. They will be the beneficiaries in the long term."***

**APPENDIX FOUR:  
OTHER WB SURVEYS 2020**

# **SURVEY FINDINGS – WORLD BOWLS 2020 GENERAL SURVEY**

# SURVEY FINDINGS (2020 GENERAL SURVEY)



The following is a summary of the key findings from the 2020 General Survey:

1. Access of bowls equipment has not been easy for most of the MNAs except the MNAs in Australia and New Zealand.
2. Most MNAs prepare and regularly review their financial forecasts.
3. Majority of MNAs have an excellent relationship with National Sports Authority.
4. There are not many MNAs that have a national marketing and promotion plan.
5. Most of the MNAs are willing to take part in additional international events specially all MNAs in Asia, America and Oceania.
6. Majority of MNAs in Europe do not receive any sort of support or funding from the government or the sports authority for their administration costs.

Continents	MNAs that made use of resources provided to promote the World Bowls Global Marketing Initiative
Europe	13 MNAs.
Asia	6 MNAs.
Americas	2 MNAs.
Oceania	1 MNA.
Africa	1 MNA.

# SURVEY FINDINGS (2020 GENERAL SURVEY)



Continents	MNAs that have a Website	Social media outlets	Proportion of MNAs with a National Marketing and Promotion Plan	Dedicated marketing department and/or press/media/marketing/c communications officer
Europe	12 have a website and 3 do not.	11 are on Facebook, 5 on Twitter, 5 on Instagram and 2 on other outlets.	4 out of 15	2 MNAs have a marketing department, 2 have P/M/M/C officer, 2 have both and 1 has none.
Asia	5 have a website and 3 do not.	5 are on Facebook and 3 on other outlets.	2 out of 12	1 MNA has P/M/M/C officer and 1 has both.
Americas	4 have a website and 1 does not.	3 are on Facebook, 3 on Twitter, 3 on Instagram and 1 on other outlets.	3 out of 6	1 MNA has a marketing department, 1 has P/M/M/C officer and 1 has both.
Oceania	All MNAs have a website.	2 are on Facebook, 1 on Twitter, 1 on Instagram and 1 on other outlets.	2 out of 2	All MNAs have a marketing department.
Africa	All MNAs have a website.	3 are on Facebook and 2 on Twitter.	1 out of 4	2 MNAs have P/M/M/C officer.

# SURVEY FINDINGS (2020 GENERAL SURVEY)



Continents	MNA prepare and regularly review annual financial forecasts	MNA that possess the current national development strategy	Ease of access of bowls equipment	Administration office or officers working from home
Europe	8 - yes 6 - no	6 out of 15.	9 – extremely easy 6 – not easy	11 – work from home 5 – administration office
Asia	7 - yes 1 - no	3 out of 12.	3 – extremely easy 5 – not easy	4 – work from home 4 – administration office
Americas	5 - yes	2 out of 6.	1 – extremely easy 4 – not easy	2 – work from home 2 – administration office
Oceania	2 - yes	All MNAs.	2 - extremely easy	2 – administration office
Africa	2 - yes 1 - no	1 out of 4.	1 – extremely easy 2 – not easy	1 – work from home 1 – administration office

# SURVEY FINDINGS (2020 GENERAL SURVEY)

Continents	MNAs who have received Financial assistance to participate in international events	MNAs that are willing to participate in more international events	Regularity in reviewing constitution and policies	MNA's relationship with the National Sports Authority
Europe	Ireland, Wales, Cyprus and Israel.	5 – Maybe 2 – No	7 - Every year 3 - Every two years 2 - Whenever necessary	5 – excellent 4 – good 2 – fair 2 – poor 1 – very poor
Asia	Philippines, Singapore, Brunei, Malaysia and Hong Kong.	All MNAs.	2 - Every year 4 - Every two years 1 - Every five years 1 - Whenever necessary	3 – excellent 3 – good 2 – fair
Americas	Falkland Island and Canada.	All MNAs.	2 - Every year 3 - Every two years	3 – excellent 2 – fair
Oceania	Australia and New Zealand.	All MNAs.	2 - Every year	2 – excellent
Africa	All nil responses.	1 - Maybe	1 - Every year 1 - Whenever necessary	1 – excellent 1 – good 1 – fair

# **SURVEY FINDINGS – WORLD BOWLS 2020 PANDEMIC SURVEY**

# SURVEY FINDINGS (2020 PANDEMIC SURVEY)



The following is a summary of the key findings from the 2020 Pandemic Survey:

1. COVID19 had a detrimental impact on Bowls across all regions with all MNAs having to close down, re-schedule and cancel various events.
2. Globally, the majority of countries had no (or very little) financial support from Government or industry organisations.
3. This limited the ability for most MNAs to provide meaningful support to their members.
4. Pleasingly, the majority of MNAs had re-started Bowls activity in their countries prior to completing this survey.
5. Australia and New Zealand were the two main outliers, which received significant financial support from Government organisations and, were able to pass this support on to their affiliated members

Continents	Effect of COVID-19 on the sport within MNAs	Support from National Government/National Sports Authority	Support from MNAs to Member Clubs	Any other support from MNAs to Member Clubs
Europe	16 – effected	3 – received support 11 – didn't receive support	7 – received support 9 – didn't receive support	12 – received support 4 – didn't receive support
Asia	8 – effected	2 – received support 6 – didn't receive support	8 – didn't receive support	2 – received support 6 – didn't receive support
Americas	7 – effected	1 – received support 5 – didn't receive support	2 – received support 4 – didn't receive support	4 – received support 2 – didn't receive support
Oceania	3 – effected	2 – received support	2 – received support 1 – didn't receive support	3 – received support
Africa	4 - effected	3 – didn't receive support	1 – received support 3 – didn't receive support	4 – received support

# SURVEY FINDINGS (2020 PANDEMIC SURVEY)



Has bowls re-started in your clubs? (As per August 2020)

EUROPE	
Guernsey	Y
Germany	Y
Netherlands	Y
Spain	Y
Scotland	Y
Ireland	Y
Malta	Y
Wales	Y
England	Y
Isle of Man	Y
Israel	Y
Cyprus	Y
Turkey	N
Sweden	Y
Czechia	Y

ASIA	
Philippines	Y
Macau	N
Malaysia	Y
Japan	Y
Hong Kong	N
Thailand	Y
China	N
Singapore	Y

THE AMERICAS	
Argentina	N
Brazil	Y
Falkland Islands	Y
Jamaica	Y
United states	Y
Canada	Y

OCEANIA	
New Zealand	Y
Australia	Y
Fiji	Y

AFRICA	
South Africa	Y
Zimbabwe	Y
Namibia	N
Kenya	Y

Y	YES
N	NO

## What has been the effect of the Covid-19 virus on the sport within your MNA?

### Europe -

- Impacted the sport in Germany to an extent that the training and club life came to a complete standstill.
- All sporting activities were shut down for a period of two months in Israel.
- Stopped having competitions between clubs in Sweden.
- All local and national and international events had to get cancelled in Turkey and England.
- The sport has been non-existent and affected player's mental health in Malta.
- The virus has had a massive financial impact on the sport in Scotland.

### Asia -

- No financial support from the government for maintain the greens in Philippines.
- All international events and national championships in 2020 were cancelled or put on hold in Japan, Singapore, China and Hong Kong.

### The Americas -

- All national and international tournaments were paused, and clubs were closed in Brazil.
- Falkland Islands had very little effect due to the virus as they had shut down for two months only.
- Canada faced a loss of revenue over 50% for national association which included the membership, events and programming due to the cancellation of national championships and 2020 North American Challenge.
- United states had to cancel two of their major BUSA run tournaments, the US Open and national championships.

### Oceania –

- New Zealand and Australia had to cancel the events and tournaments and were financially impacted.
- Fiji had to postpone the World Bowls Championships, World Indoor Singles and World Champion vs Champion.

### Africa –

- The effect on the sport in Namibia and Kenya was very bad and led to the leagues getting cancelled or postponed which eventually led to clubs losing on income.
- There was no participation in the sport for four months in South Africa.
- No competitive bowls were allowed, and the clubs were financially affected in Zimbabwe

## What financial support has been provided to your MNA by your National Government/National Sports Authority in relation to the pandemic?

### Europe –

- Germany, Turkey, Sweden, Switzerland, Spain, Malta, Scotland, Ireland and Isle of Man had received no financial support.
- Netherlands was not entitled to ask for any support due to their expenses being higher than their income.
- Israel had gotten support from the local sports authority which was 70%.
- In Guernsey, each club received £4,000 in support from the Government funds.

### Asia –

- Philippines, Japan, China, Thailand and Singapore had received no financial support.
- Malaysia was provided with free office rental for six months, cash incentives for office management of RM10,000 from the Olympic Council of Malaysia and RM60,000 from government sport ministry for the year 2020.
- Hong Kong was provided with the annual subventions.

### The Americas –

- Falkland Islands, Argentina, Jamaica, Brazil and United States had received no financial support.
- Bowls Canada had directly received \$61,000 CAD to recover the losses of membership, sales, event and programming revenue. They were also able to access a COVID specific business loan of \$40,000.

### Oceania –

- Bowls Fiji received no financial support.
- Australia was provided with \$700,000 in support from the Federal Government.
- New Zealand was also provided with support with guarantee of existing funding for next 12 months.

### Africa –

- Zimbabwe, Namibia and South Africa had received no financial support.
- Kenya had registered the national squad for the Government Athletes program of support and is awaiting its activation.

## What financial support has your MNA provided to Member Clubs as a result of the pandemic?

### Europe –

- Germany, Turkey, Sweden, Czechia, Spain, Switzerland, Wales, Ireland and Isle of Man provided no financial support to their Member Clubs as a result of the pandemic.
- Netherlands is considering partial restitution of the membership fees of the union.
- Malta had offered payment plans for membership.
- In Cyprus, the entry fees for 2019/2020 National competitions had been carried forward to the 2020/21 series.
- In Israel, membership fees for Member Clubs to the National Body has been reduced by almost 50%.
- Scotland had set up a Crisis fund of £50,000 for clubs who were experiencing issues with staying open and surviving.
- England provided refund for affiliation fees and entry fees worth £500,000.
- Guernsey provided each club with £4,000 in support from the government funds.

### Asia –

- Philippines, Macau, Malaysia, Japan, Hong Kong, Thailand, Singapore and China provided no financial support to their Member Clubs as a result of the pandemic.

### The Americas –

- Argentina, Jamaica, Brazil and Falklands Islands provided no financial support to their Member Clubs as a result of the pandemic.
- Canada provided an undisclosed amount of federal government money for distribution amongst provincial sport associations.

### Oceania –

- New Zealand provided a \$130,000 hardship fund from their balance sheet reserves.
- Australia provided membership relief to clubs ranging from 20-50% and \$500,000 of affiliation fee relief.
- Fiji provided no financial support to their Member Clubs as a result of the pandemic.

### Africa –

- South Africa, Zimbabwe and Kenya provided no financial support to their Member Clubs as a result of the pandemic.
- Namibia cut membership by half and also on prorated payments.

## What other support has your MNA provided to Member Clubs as a result of the pandemic?

### Europe –

- Germany, Sweden, Czechia and Isle of Man provided no other support to Member Clubs as a result of the pandemic.
- Netherlands provided extra tournaments for free of cost.
- Malta provided moral support by conducting monthly video calls to ensure the health and well being of each player.
- Swiss Bowls prepared a specific protection concept for Bowls in Switzerland which each club could use.
- Turkey had planned to support them with technical materials to start training within the clubs.
- In Israel, a 500 NIS cash incentive had been offered to each Member Club for new members joining the club during the year of 2020.
- Cyprus provided with forwarding health advice.
- Guernsey supported the clubs with posters and information on each of the stages/phases.
- Scotland provided with national development officer direct support, advice from government sent to clubs, advice on fund to support clubs in financial difficulties, regular updates, webinars and many other support mechanisms.
- Ireland provided clubs with guidelines to allow a safe resumption of bowls.
- Wales provided with regular virtual meetings with Welsh Executive giving information to counties and clubs as well as charity events.
- England provided with significant support including regular guidance documents and webinars/podcasts/briefings to inform.

### Asia –

- Philippines, Macau, Japan, Thailand, China and Singapore provided no other support to Member Clubs as a result of the pandemic.
- Malaysia provided SOPs as guidelines and organised local games adhering the SOPs.
- Japan provided with a guideline document for each bowler to restart the practice and local games in each club.

### The Americas –

- Argentina held virtual meeting a club members delegates and provided them with a game protocol during the pandemic.
- Jamaica provided organisational support in following the right protocols in restarting play.
- United States prepared 'back to bowling' guidelines even before the clubs were open.
- Canada provided services including creation of national reopening protocols, created membership engagement tools, resources for free distribution and engaged in an intentional membership agreement campaign including virtual programming.
- Falkland Islands and Brazil provided no other support to Member Clubs as a result of the pandemic.

Continuation...

## **Oceania –**

- Australia provided with resources and return to bowls response plan. Ensured that their workforce remained connected with Clubs throughout the shutdown period. Produced a COVID-19 Return to Bowls Plan which included several resources, including RinkBooker (a rink booking system that was integrated into Club websites that facilitated contact tracing and compliance with restrictions on gatherings) and initiatives that would help Clubs recommence their activities and/or increase trade.
- New Zealand provided with advice and guidelines.
- Fiji provided with guidance related to safety, health and protocols.

## **Africa –**

- Significant social media interaction was provided by South Africa by various Standing Committees with memberships.
- Zimbabwe assisted in correspondence with regulatory authorities.
- Namibia provided with full knowledge of dangers of the pandemic and the safety measures to follow.
- Kenya prepared a COVID-19 Bowls Protocol.