



SUMMARY OF KEY FINDINGS
FROM THE 2018 USBC OPEN
CHAMPIONSHIPS SURVEY



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1. INTRODUCTION

In 2017, USBC introduced significant changes to the USBC Open Championships designed to improve the experience and competitive environment of the event. The changes included a new three-division structure designed for better peer-to-peer competition and withholding publication of lane patterns until after the event to improve fairness. Now that bowlers have experienced the changes in the 2017 and 2018 Championships, a survey was conducted to determine participants' acceptance and approval of the changes.

Between August 8 and September 18, 2018, USBC gathered a total of 3,562 survey responses from participants in the 2018 USBC Open Championships in Syracuse, New York. Based on 37,780 total bowlers in the Open Championships, 3,562 survey respondents, and a confidence interval of 95%, it is estimated that this survey has a margin of error of +/- 1.6%.

In September 2018, Victus Advisors was engaged by USBC to review the survey results and prepare the following white paper highlighting some of the key findings from the 2018 USBC Open Championships survey.

2. COMPETITIVE ENVIRONMENT

Please note: For some survey questions, the “positive/agree” and “no opinion/no difference” responses were grouped together. This was done to create a single metric that represents the overall acceptance and approval of the changes made by USBC to the Open Championships.

Division Structure

Bowlers were asked about the recent change to a three-division structure for the Open Championships. Respondents were asked to indicate if the new structure allowed them/their team to be more competitive, less competitive, or if the change made no difference for them. The results from the survey are shown in the table below:

The three-division structure allowed you and your teammates to be:		
	<u>More competitive or No Difference</u>	<u>Less competitive</u>
Total	2,668	456
Percentage	85%	15%

The overwhelming majority (85%) of respondents indicated that the new division structure allowed them to be more competitive or made no difference in competitiveness. This is one indication that the changes to the division structure had the intended effect of increasing peer-to-peer competitiveness.

Bowlers were also asked their opinion about the recent division changes as shown in the table below:

Which best describes your opinion about the changes to division structure and average requirements		
	<u>Positive</u>	<u>Negative</u>
Total	2,352	756
Percentage	76%	24%

2. COMPETITIVE ENVIRONMENT CONT.

The positive responses represent those who described the changes to the division structure as positive for the tournament long-term or did not like how the changes affected them but agree with the goals of the changes. This group represented 76% of total respondents. The remaining 24% said the changes were negative for the tournament long-term.

Lane Pattern Difficulty

The survey asked bowlers to describe the lane conditions at the 2018 Open Championships as an appropriate challenge, too challenging, or not challenging enough for a national championship. The results are shown in the following table:

How would you best describe the lane conditions at the 2018 Open Championships.		
<u>Appropriate Challenge</u>	<u>Too Challenging</u>	<u>Not Challenging Enough</u>
2,090	993	24
67%	32%	1%

The majority of bowlers (67%) indicated that the lane conditions at the 2018 Open Championships presented an appropriate challenge for a national event. This breakdown between lane conditions being an appropriate challenge and too challenging was consistent across bowlers of all skill levels at the Open Championships.

Bowlers were also asked their opinion on what the lane conditions should be at the Open Championships. The table below summarizes the survey results:

When bowling at the Open Championships, lane conditions should be:		
<u>Very Challenging</u>	<u>Somewhat Challenging</u>	<u>House shot similar to league bowling</u>
966	1,932	207
31%	62%	7%

Most bowlers (62%) think that lane conditions at the Open Championships should be somewhat challenging as opposed to very challenging (31%) or similar to league bowling (7%). This distribution of results was similar across surveyed bowlers of all skill levels.

Lane Pattern Publication

Bowlers were asked about their preference of having lane patterns remain secret until the end of the event. The following table summarizes bowlers' preferences:

I preferred having lane patterns secret and not revealed until after the event.		
	<u>Agree or No Opinion</u>	<u>Disagree</u>
Total	1,984	1,068
Percentage	65%	35%

Overall, the majority (65%) of bowlers agreed or had no opinion with the recent change to have lane patterns remain secret and not revealed until after the event. The results show that bowlers had mostly positive and neutral opinions towards the change of not disclosing the lane patterns until after the event.

It is noted that bowlers whose league average was 210+ had the highest percentage (46%) of respondents who disagreed with having lane patterns remain secret during the event when compared to the overall group. It can be reasonably inferred that more competitive bowlers prefer to know the lane patterns and conditions during the event to better their performance and score at the Open Championships.

3. SATISFACTION RANKINGS

Bowlers were asked to identify their levels of satisfaction relating to 19 aspects of the 2018 tournament. Results were evaluated using “Top-2 Box” combined scores (“7” + “6”, representing the highest levels of satisfaction) and “Bottom-3 Box” (“3” + “2” + “1”, representing the lowest satisfaction levels). Our Top-2 Box methodology is a best-in-class approach to satisfaction measurement. The focus on Top-2 Box scores places a higher emphasis on the priority of achieving maximum satisfaction (scores of 6 or 7) from every visitor. The following chart summarizes the satisfaction section of the survey:



On-site tournament staff received both the highest percentage Top-2 Box and lowest percentage Bottom-3 Box Scores of any aspect of the survey. Other top-performing categories were tournament registration process, pace of play, the Open Championships venue, and overall satisfaction with tournament operations.

It should also be noted that overall satisfaction with tournament operations is likely to have been impacted negatively if the majority of Open Championships bowlers were dissatisfied with the operational changes made in 2017 and 2018. However, this was clearly not the case, as overall satisfaction with tournament operations was one of the highest scoring categories in the satisfaction rankings.

3. SATISFACTION RANKINGS **CONT.**

The worst performing categories were squad time schedules, food & beverage operations, coupon book & promo items, and individual performance as evidenced by their low Top-2 Score and high Bottom-3 Score percentages relative to other categories in the survey.

Other Satisfaction Considerations

Several other key findings related to bowler satisfaction at the 2018 USBC Open Championships included:

- The top three factors contributing to bowlers' decision to bowl at the Open Championship were (in order of more important to less important) spend time with family/friends, test my skills against peers, and host city and what it has to offer.
- Over 50% of respondents indicated that the Doubles/Singles squad times are a significant problem.
- Only 12% of those surveyed said they would not be attending the 2019 Open Championships. Many of those 12% cited travel and other costs being too high as the reason for not attending.

4. SUMMARY OF KEY TAKEAWAYS

Based on the analysis completed in the previous pages of this report, Victus Advisors has identified the following key takeaways from the 2018 USBC Open Championships survey:

- The overwhelming majority (85%) said that the new division structure allowed them to be more competitive or made no difference to the competitiveness of the Open Championships. This is a clear indication that the change to the three-division structure at the tournament had its intended effect of increasing peer-to-peer competitiveness at the event.
- Overall, 76% of respondents said they think the new three-division structure is positive for the tournament long-term or that they agree with the goals of the changes. This is indicative of the generally positive view of the new division structure.
- The majority of bowlers (over 60%) indicated that the lane conditions at the 2018 Open Championships presented an appropriate challenge for a national championship event. The overwhelming majority (93%) said that lane conditions at the Open Championships should be either very challenging or somewhat challenging.
- 65% of respondents indicated that they agreed with or had no opinion about keeping lane patterns secret until after the event. This majority shows a positive leaning toward the changes made in lane pattern communications in 2017 and 2018.
- Overall satisfaction with tournament operations was among the best performing categories in terms of bowler satisfaction at the 2018 Open Championships, which further indicates that there has not been a significant bowler backlash to the operational changes made in 2017 and 2018.



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