



2019 USBC OPEN CHAMPIONSHIPS **SURVEY RESULTS**

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Overview

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, average requirement and team roster qualifications, along with withholding publication of lane patterns until after the event to improve fairness.

Now that bowlers have experienced the changes in the 2017, 2018 and 2019 Championships, a survey was conducted to determine participants' ongoing acceptance and approval of the changes.

Between March 21 and August 28, 2019, USBC gathered 5,212 survey responses from participants in the 2019 USBC Open Championships in Las Vegas. Based on 52,200 total bowlers in the Open Championships, 5,212 survey respondents, and a confidence interval of 95%, this survey has a margin of error of +/- 1%.



SURVEY RESULTS

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Survey Participants

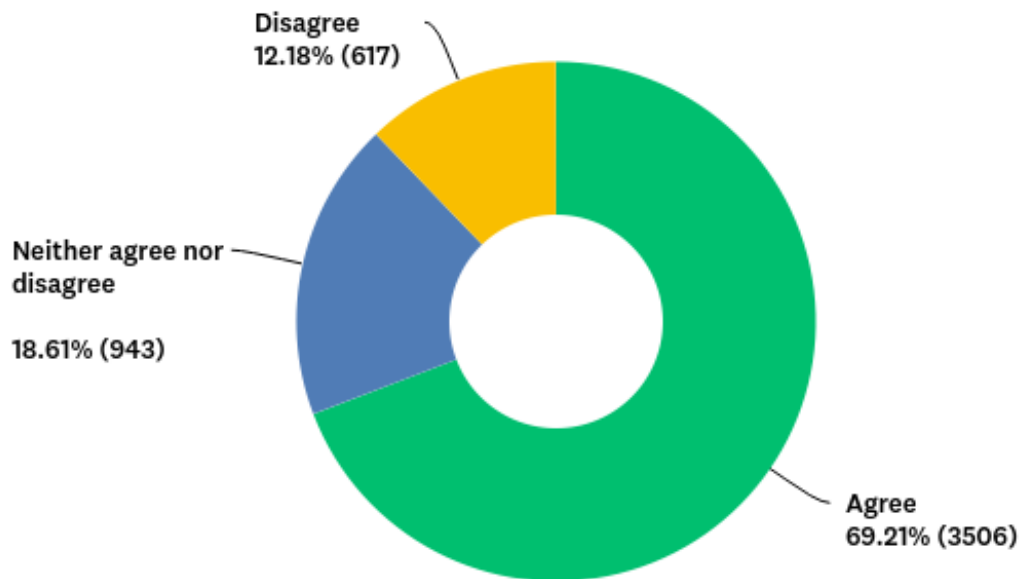
- 81% of those who responded to the survey were competitors and 19% were competitors who captained the team
- 18% of survey participants came with one team to the Open Championships, 75% traveled with less than five teams, 14% brought five to nine teams, and 12% came in with 10 or more teams.
- 12% of respondents said they were bowling their first Open Championships, 53% have bowled the tournament nine or less times, 23% less than 20 years, and 23% have been in bowling in the event for 20 or more years.
- The majority, 54% of those who took the survey, were from the following top-10 states in order: California, Illinois, Michigan, Wisconsin, Texas, Ohio, Minnesota, Florida, New York, and Arizona.
- Surveyed Open Championship bowler's household income: 18% make 50k or less, 43% make \$50k - \$100k, and 39% make more than \$100k.
- The majority, 87% of survey respondents, were male, while 12% were female and 1% preferred not to say.
- A majority, 64% of Open Championship survey responses, came from bowlers who are 50 years or older, 32% were 30 – 49 years of age, and 4% were age 29 or younger.

Average Structure

Bowlers were asked about the change in 2019 to using Championships Averages, based on a minimum of 27 games, as a bowler's entering average, and whether it was a positive change for the future of the tournament.

Respondents were asked to indicate if they agreed or disagreed with that statement, or if they neither agree nor disagree.

Answered: 5066 Skipped: 146



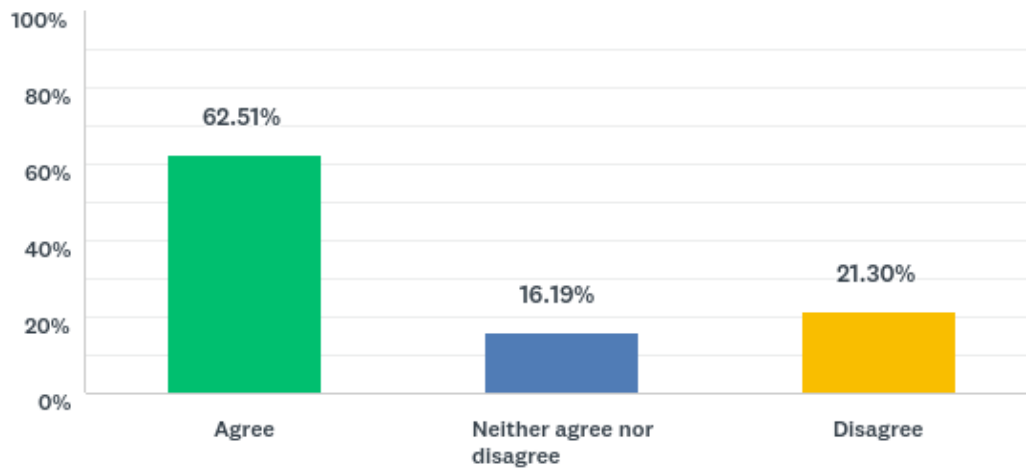
The majority of bowlers (69%) agreed this was positive. The breakdown regarding whether this was positive or negative for the tournament was mostly consistent across bowlers of all skill levels at the Open Championships.

- Regular – 64%
- Standard – 74%
- Classified – 69%

Lane Pattern Difficulty

The survey asked bowlers whether they agreed, disagreed or neither agree nor disagree that the lane conditions at the 2019 Open Championships were appropriate for a national championship tournament. The results:

Answered: 5066 Skipped: 146



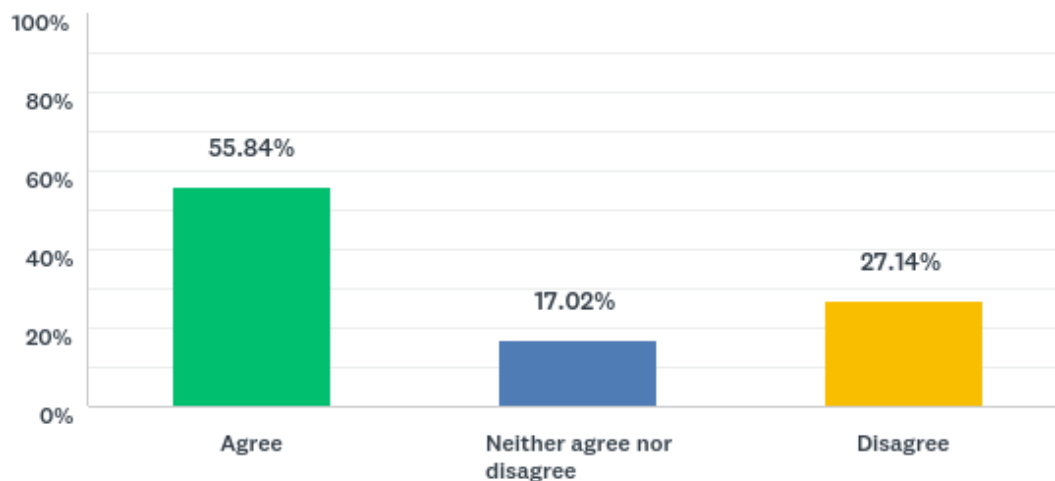
The majority of bowlers (63%) indicated the lane conditions at the 2019 Open Championships were appropriate. The breakdown between lane conditions being appropriate for a national championship tournament was consistent across bowlers of all skill levels at the Open Championships.

- Regular – 64%
- Standard – 62%
- Classified – 63%

Lane Pattern Publication

Bowlers were asked whether they agreed the lane patterns being kept secret, and not revealed until after the tournament, helps create a more level playing field for all competitors. The results:

Answered: 5066 Skipped: 146



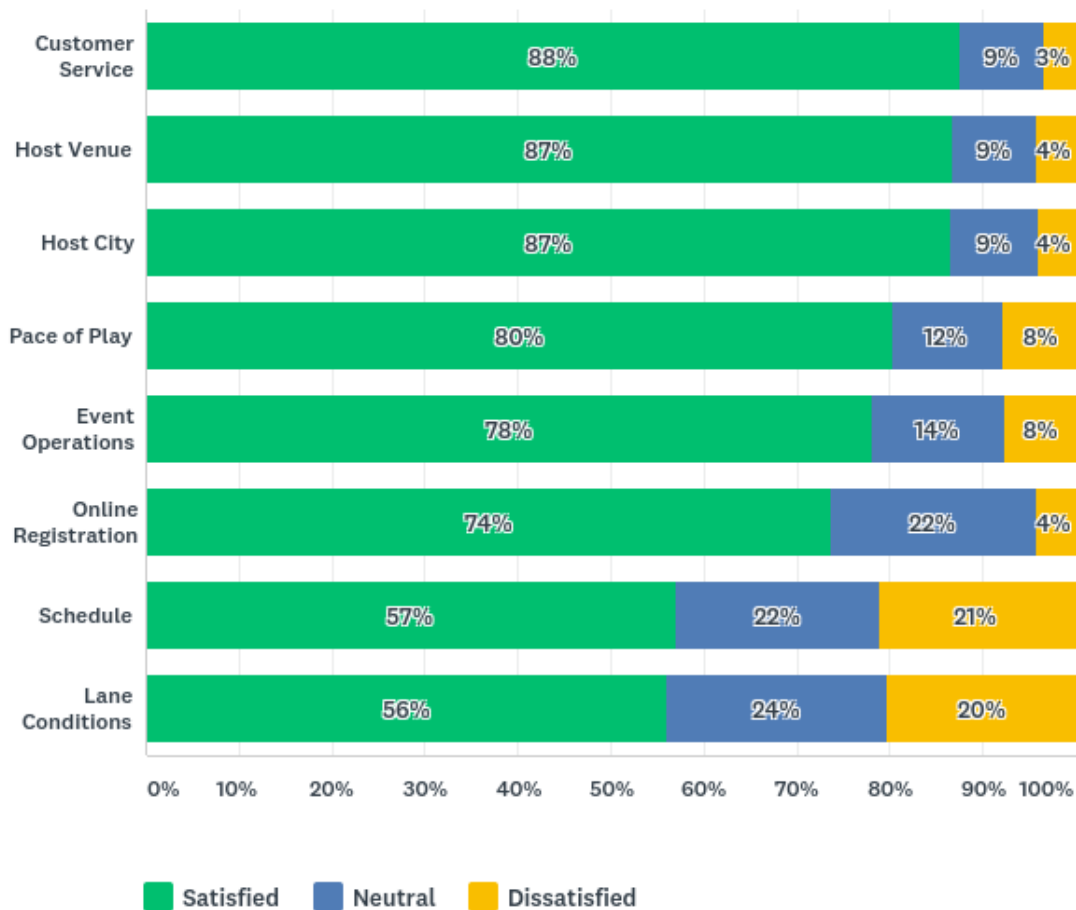
Overall, the majority (56%) of bowlers agreed the lane patterns should remain secret and not revealed until after the event. The results show bowlers have a wider acceptance in 2019, up 12% over 2018 when only 44% agreed with not disclosing the lane patterns until after the event.

It is noted that bowlers who compete in the Regular Division had the highest variance, with only (49%) of respondents agreeing with having lane patterns remain secret during the event, when compared to the Standard and Classified divisions where 59% and 63%, respectively, agreed.

- Regular – 49%
- Standard – 59%
- Classified – 63%

Event Satisfaction

Bowlers were asked to identify their levels of satisfaction relating to eight aspects of the 2019 tournament. Results were evaluated by combining satisfied with very satisfied, Neutral by itself, dissatisfied with very dissatisfied, and any N/A answers removed with the results recalculated. The following summarizes the satisfaction section of the survey:



On-site tournament staff customer service, the host venue and the host city received the highest percentage of satisfaction, up nearly 10% over 2018. Other top-performing categories were the tournament registration process, event operations and pace of play.

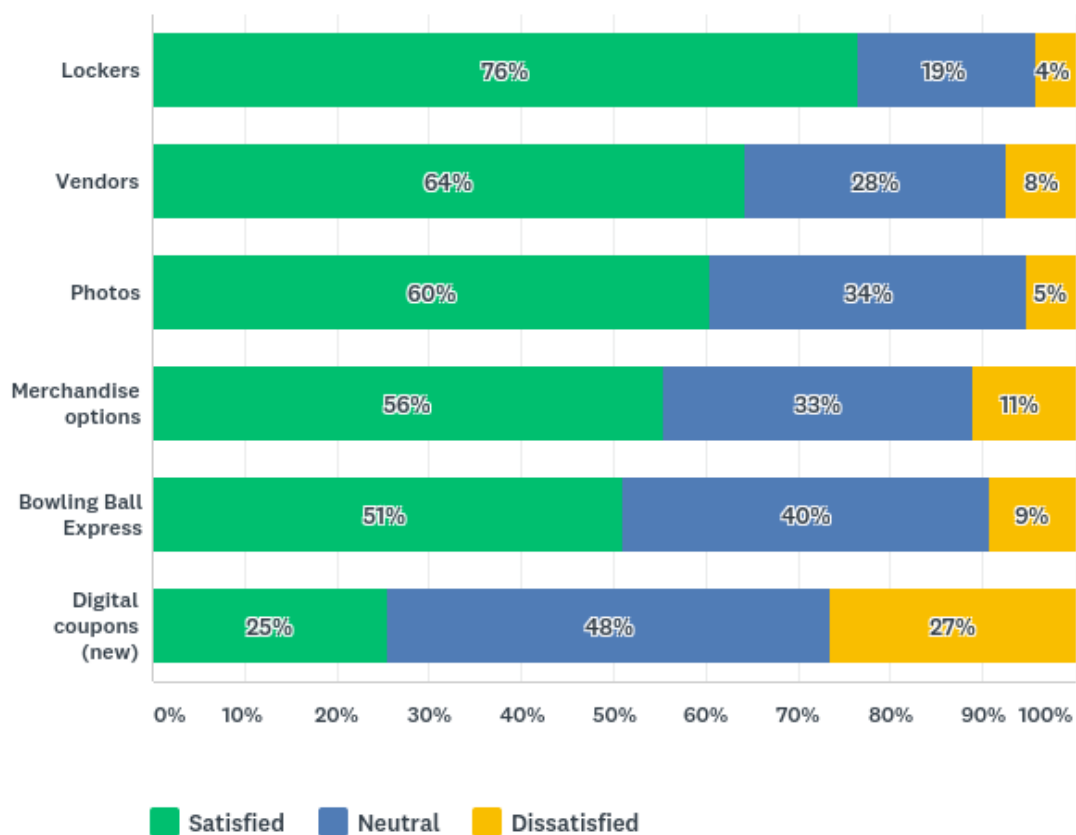
It is worth noting that overall satisfaction with tournament operations is likely to have been impacted negatively if the majority of Open Championships bowlers were dissatisfied with the operational changes made in 2017.

However, this was clearly not the case, as overall satisfaction with tournament operations were one of the highest-scoring categories in the satisfaction rankings.

The worst-performing categories were the tournament schedule and lane conditions; however, most bowlers still were satisfied overall by more than 50%.

Event Services Satisfaction

Bowlers were asked to identify their levels of satisfaction relating to six service-orientated aspects of the 2019 tournament. Results were evaluated by combining satisfied with very satisfied, Neutral by itself, dissatisfied with very dissatisfied, and any N/A answers removed with the results recalculated. The following chart summarizes the satisfaction section of the survey:

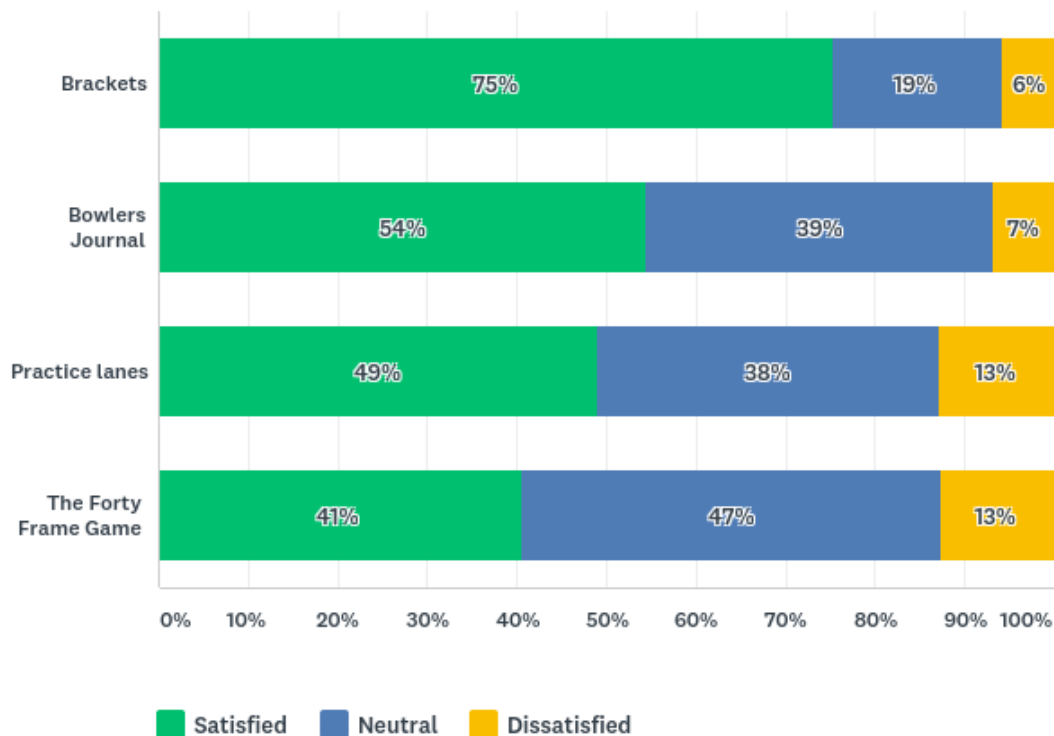


On-site lockers, vendors, photos, merchandise, and Bowling Ball Express received the highest percentage of satisfaction, especially when considering those customers who answered neutral.

The worst-performing category was digital coupons, which was a new activation for 2019 over the previous events, where coupon books were provided to captains at check-in. Specific feedback thus far indicates two factors to improving customer satisfaction in this area; first, improving communication to bowlers and captains in advance of the event, and second, including additional offers from the host city.

Side Event Satisfaction

Bowlers were asked to identify their levels of satisfaction related to side events at the 2019 tournament. Results were evaluated by combining satisfied with very satisfied, Neutral by itself, dissatisfied with very dissatisfied, and any N/A answers removed with the results recalculated. The following chart summarizes the satisfaction section of the survey:



Brackets received the highest percentage of satisfaction (75%), with the Bowler's Journal coming in second at (54%).

The lowest-performing categories were the practice lanes and Forty Frame Game; however, when combining those who answered neutral, only 13% of

customers were dissatisfied with both events.

Other Satisfaction Considerations

Several other key findings related to bowler satisfaction at the 2019 USBC Open Championships included:

- When asked if they were going to return in 2020 to bowl the USBC Open Championships in Reno, Nevada, 91% said they planned to bowl.
- 52% of first-time bowlers said they competed in the 2019 Open Championships for the **opportunity to compete**, second only to friends 71% (respondents could select more than one response to the question).
- Of those approached by USBC Open Championships staff, 94% said any issues they had were resolved and to their satisfaction.

Key Takeaways

After analyzing the 2019 Open Championships survey data, we have discerned the following takeaways:

- 87% of bowlers either agree or don't have an opinion regarding the use of Championships Averages, making that one of the most positive changes for the future of the tournament.
- 79% of bowlers agree or don't have an opinion regarding whether the lane conditions at the 2019 Open Championships were appropriate for a national championship tournament.
- 73% of bowlers agree or don't have an opinion regarding the lane patterns being kept secret and not revealed until after the tournament helps create a more level playing field for all competitors.
- The overall satisfaction with the event operations is at an all-time high, with 91% of bowlers either satisfied or neutral as it relates to key areas such as customer service, host venue and city, pace of play, event operations, online registration, event schedule and lane conditions.