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2019 USBC WOMENS CHAMPIONSHIPS **SURVEY RESULTS**

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Overview

In 2019, the 100th edition of the USBC Women's Championships was conducted in Wichita, Kansas. This marked the first time the tournament was back inside a bowling center since 2008 at Super Bowl Lanes in Detroit.

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.

While the changes were not also implemented at the Women's Championships, USBC has asked participants at the Women's Championship their thoughts about some of those changes implemented at the Open Championships.

Between April 21 and Sept. 1, 2019, USBC gathered 2,746 survey responses from participants in the 2019 USBC Women's Championships in Wichita. Based on 16,432 total bowlers in the Women's Championships, and a confidence interval of 95%, it is estimated the survey has a margin of error of +/- 2%.

Below are some of the key findings and highlights from the 2019 USBC Women's Championships survey.



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Survey Participants

- 73% of those who responded to the survey were competitors and 27% were competitors who captained the team
- 34% of survey participants came with one team to the Women's Championships, 75% travel with less than five teams, 14% brought five to nine teams, and 12% came in with 10 or more teams.
- 9% of respondents said they were bowling their first Women's Championships, 48% have competed in the tournament nine or less times, 25% have attended between 10 and 19 years, and 27% have been in bowling in the event for 20 or more years.
- The majority, 49% of those who took the survey, were from the following top-10 states, in order: Texas, Illinois, California, Kansas, Florida, Colorado, Arizona, Michigan, Minnesota, and Maryland.
- Surveyed Women's Championship bowler's household income: 35% make 50k or less, 41% make \$50k - \$100k, and 24% make more than \$100k.
- The majority, 60% of survey respondents, have a league average of 160 or less, 26% average 161-180, and 14% average 181 or more.
- A majority, 84% of Women's Championship survey responses, came from bowlers who are 50 years or older, 11% were 40-49 years of age, and 6% were age 29 or younger.



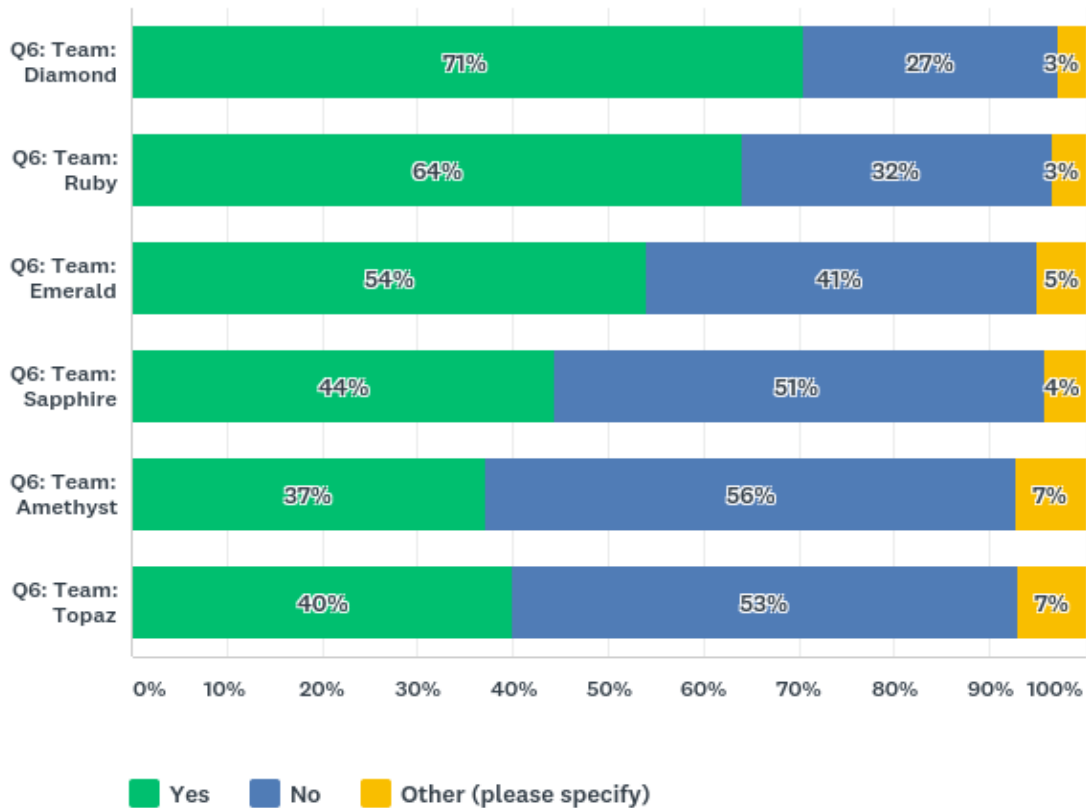
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Average Structure

Bowlers were asked if they would be in favor of using their Women's Championships tournament average as the primary source for determining their entering average (instead of their league average).

Answered: 2,526 Skipped: 220



The majority of bowlers (53%) said they were in favor. The breakdown above provides how they answered based on the division in which they compete for team. Bowlers have shown a wider acceptance of this, as 47% in the 2018 survey said yes.



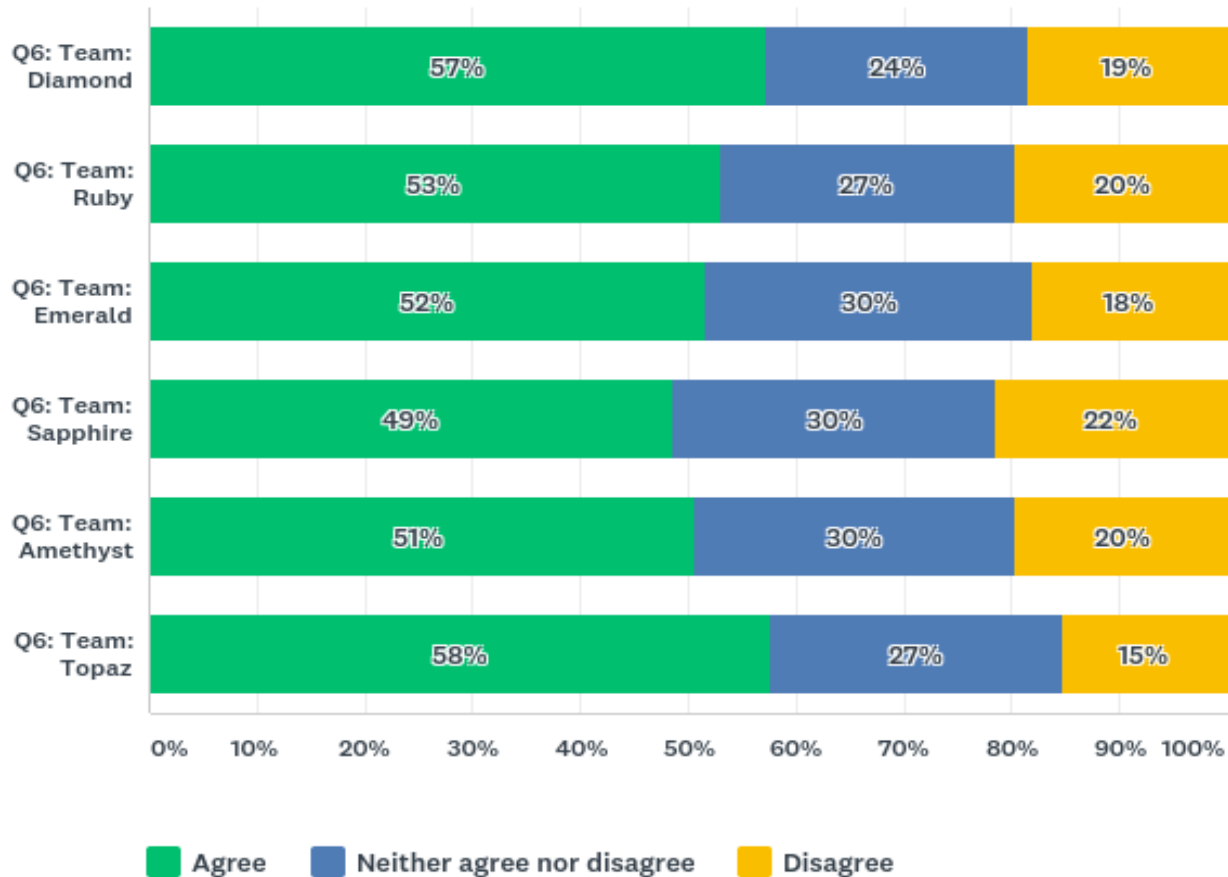
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Lane Pattern Difficulty

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

Answered: 2,526 Skipped: 220

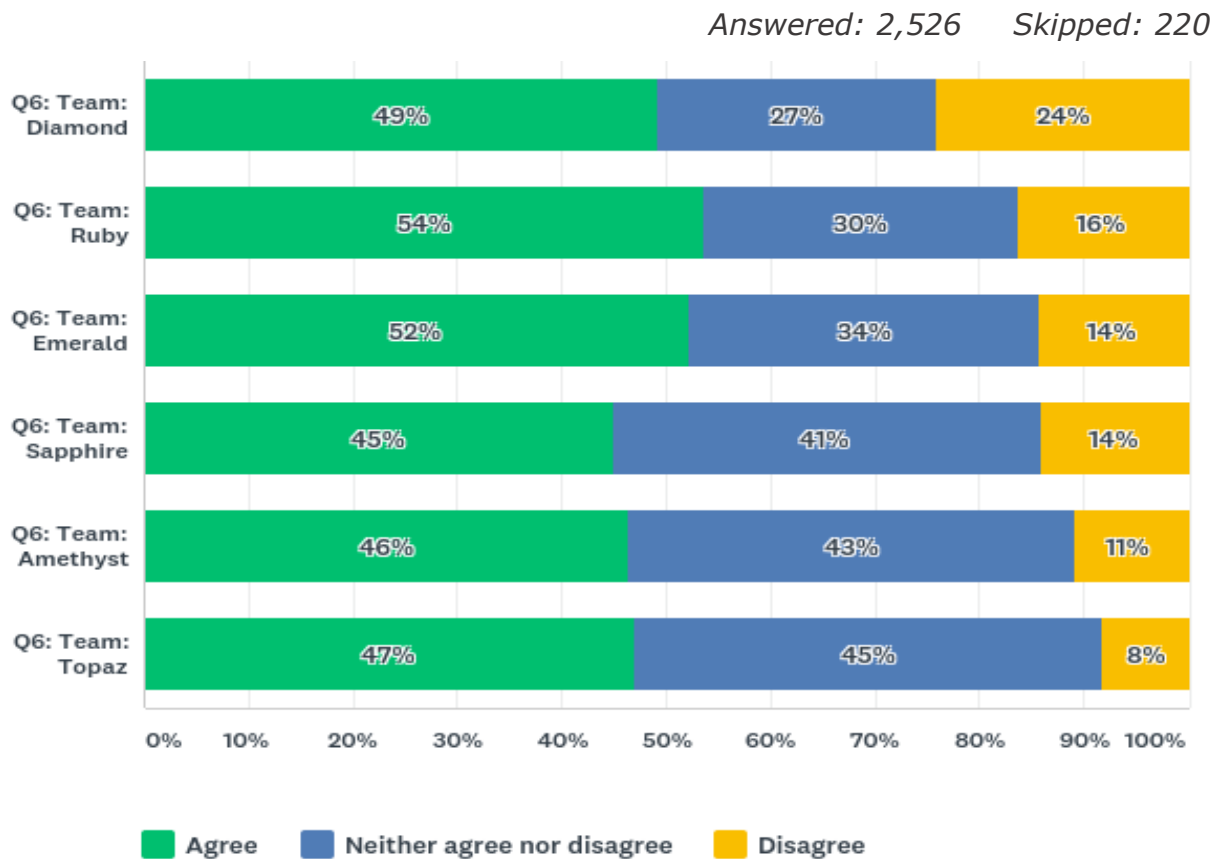


The majority of bowlers (52%) indicated the lane conditions at the 2019 Women's Championships were appropriate. The breakdown between lane conditions being appropriate for a national championship tournament was fairly consistent across bowlers of all skill levels at the Women's Championships.



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:



Overall, the majority, 50% of bowlers, agreed the lane patterns should remain secret and not revealed until after the event, with 35% indifferent on the subject and 15% who disagree.

It is noted bowlers who compete in the Diamond Division had the highest variance, with 24% of respondents disagreeing with having lane patterns remain secret during the event, when compared to the other divisions. 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 Women's Championships.



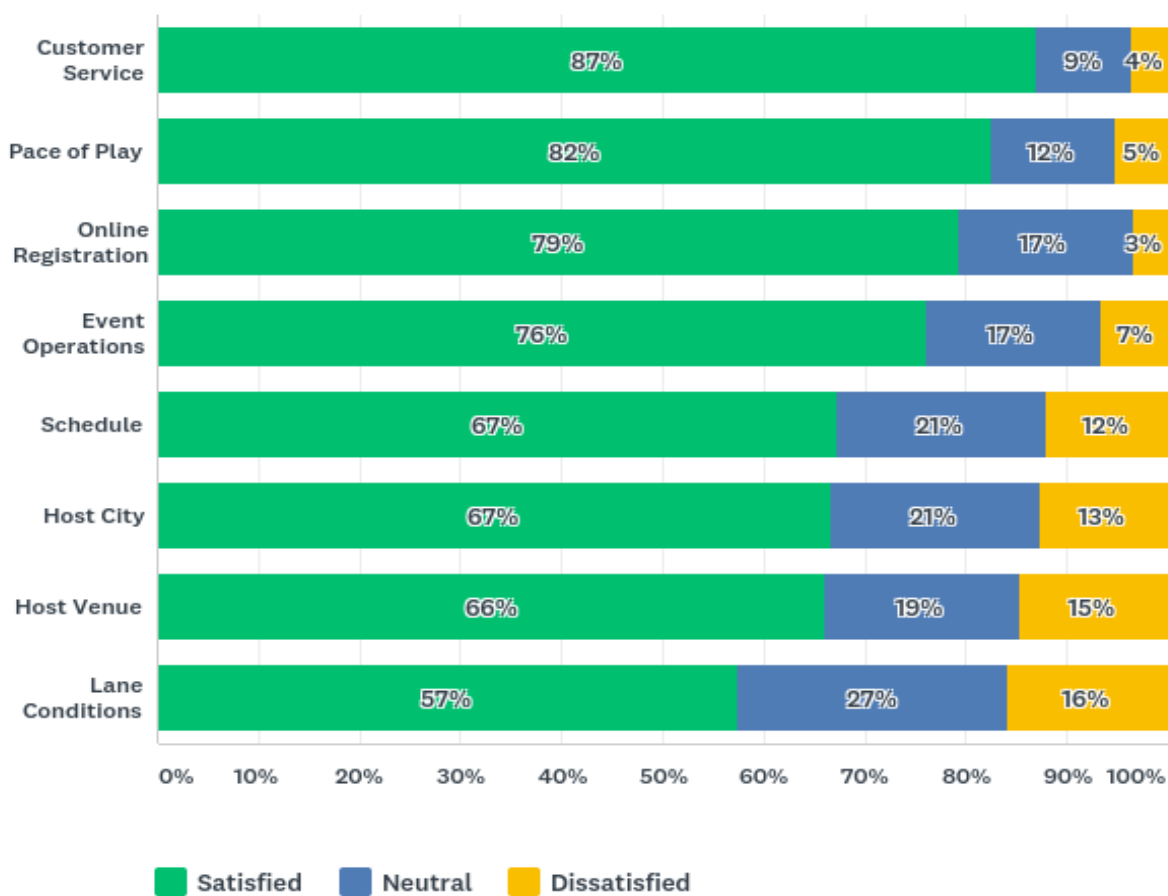
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Event Satisfaction

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:

Answered: 2,371 Skipped: 375



On-site tournament staff customer service, pace of play and online registration received the highest percentage of satisfaction.

It is worth noting overall satisfaction with the host city and venue is likely to have been impacted by years of competing in stadiums and custom-built venues. To have the ability to move the event to different parts of the country, USBC will be required to operate in bowling centers while seeking to provide a world-class experience.

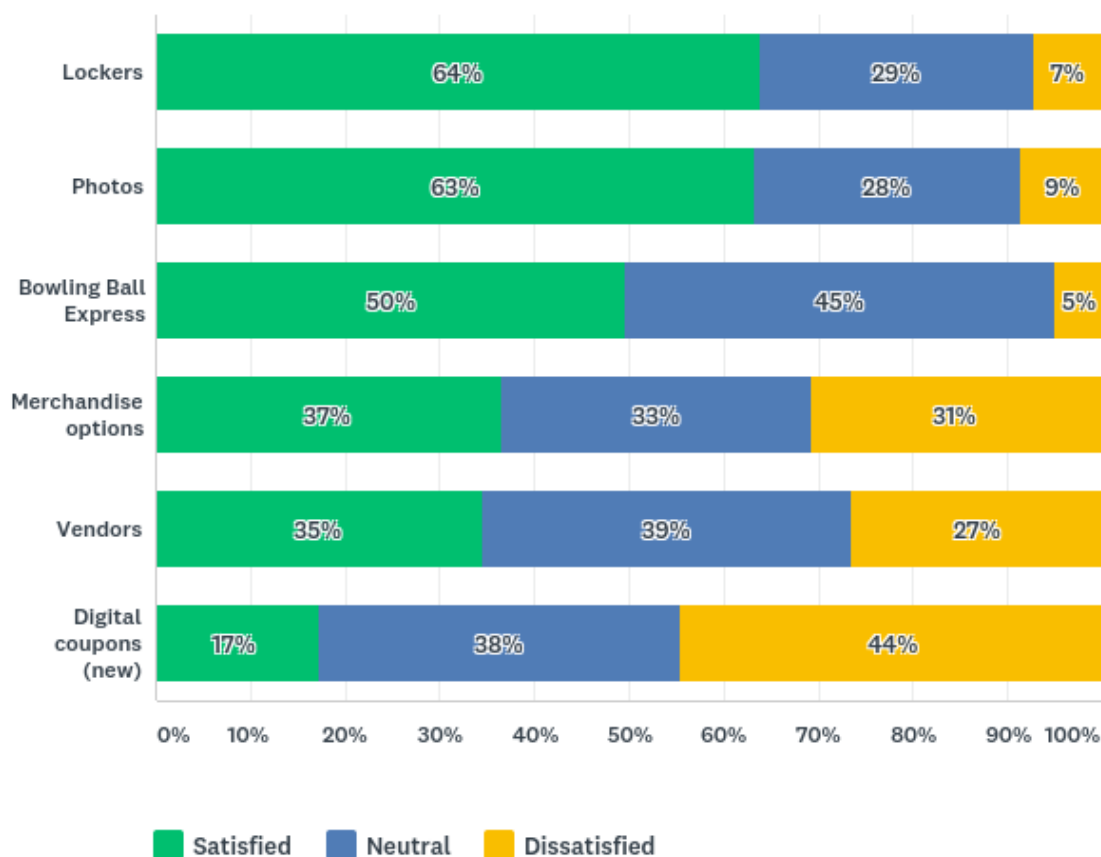
The worst-performing category was lane conditions; however, most bowlers still were satisfied overall by (57%).



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:

Answered: 2,371 Skipped: 375



On-site lockers, photos, 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.



Other Satisfaction Considerations

Several other key findings related to bowler satisfaction at the 2019 USBC Women's Championships included:

- When asked if they were going to return in 2020 to bowl the USBC Women's Championships in Las Vegas, 91% said they planned to bowl.
- 42% of first-time bowlers said they competed in the 2019 Women's championships for the **opportunity to compete**, second only to friends 66%.
- Of those approached by USBC Women's Championships staff, 88% said any issues they had were resolved and to their satisfaction.

Key Takeaways

After analyzing the 2019 Women's Championships survey data, we have discerned the following takeaways:

- 53% of bowlers are in favor of the Championships Averages being used, making that change now possible by a majority vote and a positive change for the future of the tournament.
- 81% of bowlers agree or don't have an opinion regarding the lane conditions at the 2019 Women's Championships and whether they were appropriate for a national championship tournament.
- 85% 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 all-time high, with 84% - 96% of bowlers either satisfied or neutral as it relates to key areas such as customer service, pace of play, online registration, event operations, schedule, lane conditions, and host venue and city.



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