



EBU MEMBERSHIP a) Is there a problem?

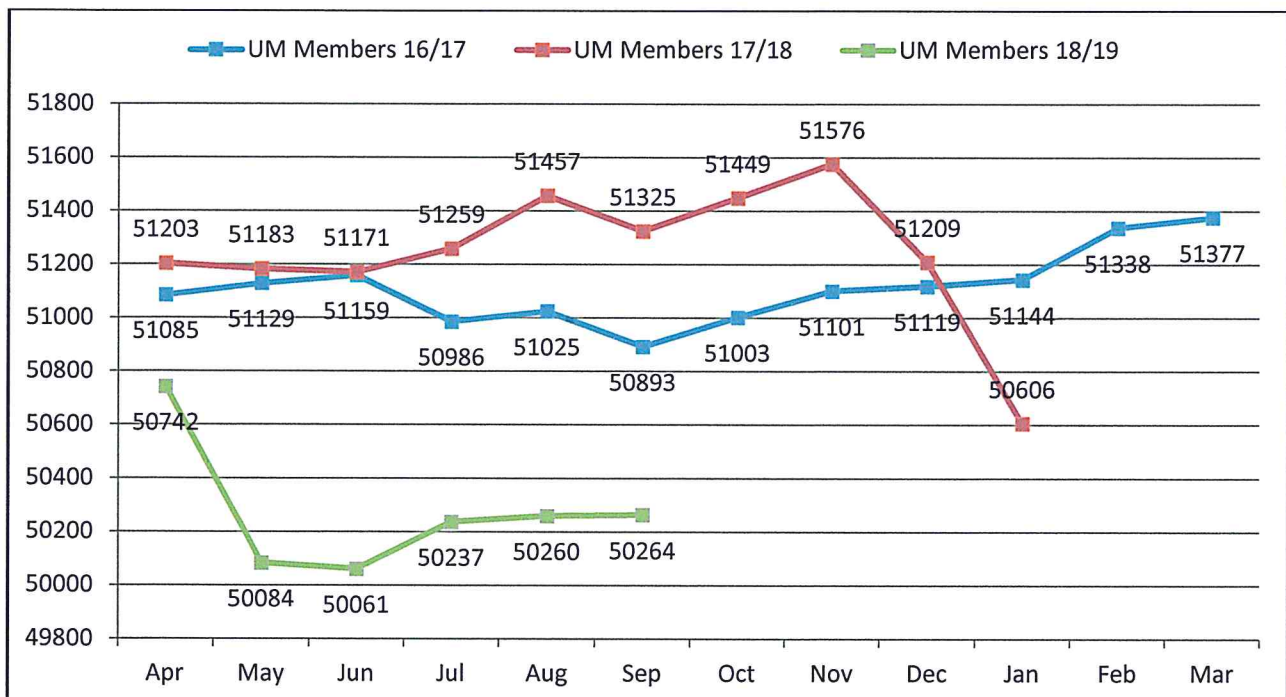
For some time the Board has been studying the levels and changes in membership numbers. It is now more than 3 years since the Board first considered this in its report on the subject in June 2015. This was followed by several others detailing the problems that we, in the EBU, face along with suggestions for tackling them. Much of what follows is a summary and update of the statistical aspects of those reports

These Reports that deal with the Membership Campaign as well as the relevant statistics are available and can be seen at:-

<https://www.ebu.co.uk/documents/official-documents/membership-campaign-all-reports.pdf>

Since the period 2013 – 14, when membership numbers peaked at 54616, the figures have been stagnant with occasional minor peaks and dips. Then in January 2018 there was a change with a monthly fall in numbers that by June had lost 1500 members. This has recovered slightly but is still well below the September 2016 position

The graph below, which excludes Direct Members (1254), Juniors (705) and students shows the figures for the last two and a half years



However the picture is worse than appears from these figures. Within our overall membership figures, 3 categories are defined. Regular players (UM2), Occasional players who play less than 12 times a year (UM1) and finally those who are registered members but for the previous year have never played in a standard session in an EBU affiliated club (UM0).

With the occasional exception, the last two categories – UM1 & UM0, have little if any involvement in ordinary club activity. They also contribute very little to EBU revenues apart from, possibly, some Congress entry fees.

In 2011 there were 12343 members who played less than 12 times a year or not at all. They formed 24.71% of the EBU membership. Both these figure have grown steadily over the years so that by 2017 they numbered 16743 members and were 30.68% of the membership. Of these approximately half have never played in an EBU club in that financial year.

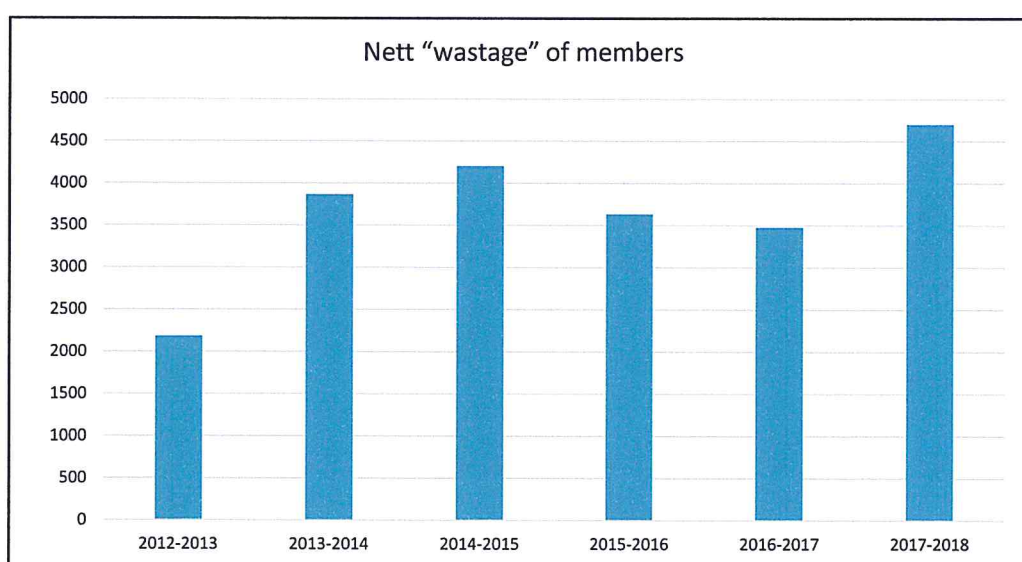
So occasional players are a slow but steadily growing proportion of the membership in absolute and percentage terms. That means that not only is our membership stagnant or declining but within the list there is a significant and growing section that is inactive.

It is reasonable to ask how can membership be on the edge of a decline when there are active teaching programmes all over the country. Indeed every month Aylesbury send out welcome packs to new members. Numbers vary from month to month but on average this runs at over 300 packs per month: the yearly average over the last 6.5 years is just under 4000 per annum.

The table, Appendix 1 “YEARLY ANALYSIS OF NEW MEMBERSHIP FIGURES SHOWING NET GAIN/LOSS” attached at the end of these notes gives the detail together with some minor reservations on the accuracy of the figures.

The table also shows the change in total membership for each year compared with the previous one. Combining a year's figures for new members with the corresponding change in the total existing membership will show the nett gain or loss. Until recently there has been a loss of existing members that has been running at 3500 per annum. In other words for our membership numbers to remain static we have had to gain 3500 new members each year.

Last year the loss jumped to more than 4500 which was only met partly by gaining new members in the year. The detail with comment on slight discrepancies can be seen in the table. The annual loss of existing members is shown in the bar chart below.



Wastage' calculated as 'new members' minus 'change in membership'. Therefore this represents how many members from the previous year are not members in the current year.

As the calculation uses only 'new' members (tracking the 'new members packs which are distributed'), 'returning' members are not counted so the true 'wastage' figure may be higher.

AGE STRUCTURE OF EBU MEMBERS

The explanation for this severe and rapid turnover in our membership lies in the age of our members. Bridge has become an elderly pastime. We have calculated that the average age of our members is about 70 years old, possibly older, maybe even approaching 75. As with all these assessments it is a moving target using incomplete data.

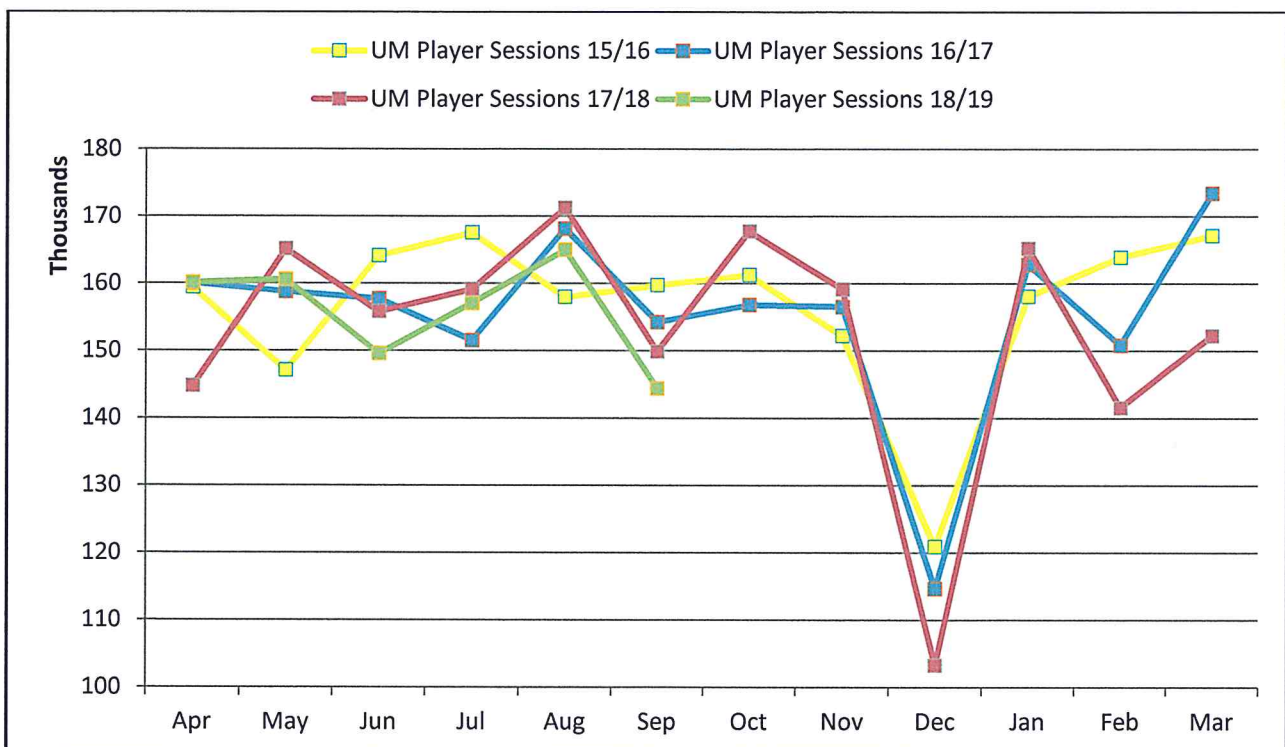
Appendix 2 is an overview study carried out by Peter Stockdale last year using data that covers approximately 20% of our members. It confirms the view on the age of our membership. A separate assessment by the Yorkshire Regional Development Officer, David Guild, based on data held by Yorkshire showed similar results. Tim Anderson our new Membership Development Officer has come up with similar figures.

The high average age of our membership taken in the context of the Office of National Statistics assessment of life expectancy in England suggests that the typical active playing time in our clubs will be no more than 15 years. This is a comparatively fleeting period compared with other leisure activities. In fact it is dramatically different from the profile of the EBU itself 30 - 40 years ago when university students were still a significant entry group to the game.

Worse still, looking at the data in Appendix 2, it appears that 70%+ of our members are 65+ years old. So the current profile is likely to become worse in the coming years. This is not helped by the majority of our new members and students being at or near retirement age.

It would be expected that if our membership is beginning to decline and is becoming older then there will be an increase in the proportion of less active members. This would be an explanation for the increase in occasional members described above. We should also expect a decline in the actual level of activity in our clubs overall.

The graphs below show the movement in the levels of club duplicate activity.



The decline in membership which became apparent in January is reflected in the levels of Player Sessions at roughly the same time. Working from the detailed figures which are available the decline can be measured accurately.

As an example, by March '18 the monthly Player Session figure was only 152,278 compared with 173,438 in March '17. This is a fall of 21,160 or more than 12% of all sessions for the month. The graph shows this was not an isolated situation; from February '18 the figures for each month, with the exception of April, have been below the corresponding month a year earlier.

At first sight these changes might have been explained by the clean up of membership lists including the implementation of GDPR. However most names that are removed are likely to be in the UM0 category, that is they had never played in an affiliated club over the last year. So they would not have any affect on the UM figures at all. In any case the changes in the session numbers month by month seem too great to have that sort of impact. Although the September'18 figures are not finalised any timing correction for late submissions will be minimal: comparison with other months, 5 - 6 weeks after that month end, suggest a discrepancy of less than 300 UM sessions.

It seems that the only explanation for the drop in UM returns is that there are fewer members playing Bridge. This trend is bad for the health of the game. It is also a threat to the revenues that the EBU receives and the services that it provides.

CLUB HEALTH

The fall in activity is also a threat to many of our clubs.

Appendix 3 - AVERAGE SIZE OF CLUB BY PRIMARY MEMBERSHIP, shows the membership numbers for all our clubs categorised by size. The information is not crystal clear because secondary membership and visitors are not allowed for. In most cases this will not matter. However in some areas, Surrey has been quoted as an example, Primary membership is an historic factor only and may have little relevance to where a member chooses to play now. So there will be a few clubs that appear to be declining but in fact are healthy. Similarly there will be clubs that have a high number of Primary members where the activity does not reflect this.

Allowing for the minor caveat described above, the striking characteristic in this data is that of the 615 EBU clubs, 298 fall in the size range 20 - 60 members. No doubt many of them are successful with a cheerful and positive atmosphere among their members. From a club management stand point, the 20 – 60 range is quite small even for a club that meets only once a week. In many cases they will be managed, organised and TD'd by just one or two people.

This puts them in a fragile position. Illness, holidays or retirement can suddenly change the condition of the club with nobody ready to take over. If we now factor in the age profile and the loss of members over time as shown in the slowly declining UM returns then, some clubs will be under threat.

In his work on the Yorkshire Pilot Membership Campaign the RDO undertook a 'life' study. For each club to survive there will need to be a minimum number of new members each year to replace those who are no longer there. This will depend on the average age of the club membership: the higher the average age the greater the rate of replacement that is needed. The overall age of our EBU membership is at least 70. At that age it has been calculated that for every 100 club members at least 4 new members will have to be recruited each year just to stand still. A table is available with different age ranges applicable to clubs of different sizes.

These notes are not the place to discuss what the choice of responses should be to this situation. What is certain is that gaining new members will be an important part of whatever solution is decided on.

The EBU has put in place various forms of support, both practical and financial, to assist those Counties and clubs who decide to run a membership campaign.

Sheet1

YEARLY ANALYSIS OF NEW MEMBERSHIP FIGURES SHOWING NET GAIN/LOSS

Appendix 1

Y/E MAR '13	Y/E MAR '14	Y/E MAR '15	Y/E MAR '16	Y/E MAR '17	Y/E MAR '18	Y/E MAR '19
Apr-12 530	Apr-13 337	Apr-14 218	Apr-15 395	Apr-16 485	Apr-17 280	Apr-18 642
May-12 332	May-13 333	May-14 718	May-15 309	May-16 260	May-17 580	May-18 202
Jun-12 327	Jun-13 313	Jun-14 284	Jun-15 289	Jun-16 408	Jun-17 307	Jun-18 454
Jul-12 354	Jul-13 180	Jul-14 283	Jul-15 276	Jul-16 248	Jul-17 168	Jul-18 289
Aug-12 368	Aug-13 341	Aug-14 282	Aug-15 258	Aug-16 259	Aug-17 288	Aug-18 263
Sep-12 312	Sep-13 114	Sep-14 289	Sep-15 196	Sep-16 275	Sep-17 261	Sep-18 327
Oct-12 423	Oct-13 680	Oct-14 483	Oct-15 301	Oct-16 339	Oct-17 368	
Nov-12 284	Nov-13 492	Nov-14 340	Nov-15 211	Nov-16 243	Nov-17 266	
Dec-12 287	Dec-13 77	Dec-14 251	Dec-15 260	Dec-16 159	Dec-17 222	
Jan-13 279	Jan-14 551	Jan-15 331	Jan-16 385	Jan-17 111	Jan-18 346	
Feb-13 418	Feb-14 300	Feb-15 384	Feb-16 298	Feb-17 258	Feb-18 335	
Mar-13 405	Mar-14 462	Mar-15 337	Mar-16 424	Mar-17 436	Mar-18 371	

Total new members 4319 4180 4200 3602 3481 3792 2177

Overall change in membership 2136

Nett "wastage" of members 2183

-909

4701

New members are calculated based on the number of 'new member welcome letters/packs' sent each month. Prior to May 2018 these were totalled manually. Since this date whether a member has been sent a pack is marked on Workbooks. In a few instances each month a new EBU number has been wrongly generated for an existing member and this is not recognised before the letters are dispatched - i.e. the member is not 'new'. This figure does not include those with an EBU number who are returning having previously let their membership lapse.

Overall change of membership for 2013 = membership at 31st March 2013 - membership at 31st March 2012, etc

Wastage = New members - change in membership. It therefore represents how many members from the previous year are no longer members (though as returning members are not counted the true figure will be higher)

Figures for column Y/E MAR '19 are all figures up to end Sept '18

Figures prepared by Karen Durrell, Ron Millet & Peter Stockdale

Appendix 2 - NOTE ON PARTIAL AGE DATA Prepared by Peter Stockdale, June 2017

We have dates of birth for 11491 members (Direct and P2P,* including Juniors, excluding students). This is about 20% of our total membership.

We are far more likely to have them for juniors (it's compulsory for the Junior Award Scheme, and we need it if they want reduced entry and P2P), though we don't have them all. I would estimate 90-95% of the juniors would have a DOB on their records.

Age group	Number	%
0 – 15	207	1.8
15 – 25	310	2.7
25 – 35	186	1.6
35 – 45	131	1.1
45 – 55	443	3.9
55 – 65	1550	13.5
65 – 75	4099	35.7
75 – 85	3476	30.2
85 – 95	1036	9.0
95+	52	0.5

The median age is 72 ; The mean age is 69.5

* Now Universal membership

Given the fact that the juniors are proportionally over represented in this data the figures will likely be higher – I couldn't say by how much, but as they are a small part of this data set anyway it may not be by that much.

AVERAGE CLUB SIZE BY PRIMARY MEMBERSHIP

	Total clubs	Mean club size		Median club size	Primary members per club																
		size	size		0	1-20	21-40	41-60	61-80	81-100	101-125	126-150	151-200	201-300	301-400	401-500	501-600	601-700	701-800	801-900	901-1000
Avon	5	132	64					2	1	1					1						
Bedfordshire	5	68	69				2		1	1											
Berks & Bucks	32	104	48				13	8	4	3		1	1			1					1
Cambs & Hunts	14	64	48			1	4	4	2	1		1	1								
Channel Islands	7	51	53			2		3	2	2											
Cornwall	13	44	34			3	4	3	1	2											
Cumbria	5	94	93			1	1			1				1							
Derbyshire	14	69	58			2	3	3		3	1	2									
Devon	22	59	39			3	9	4	1	1	1	1	2								
Dorset	6	91	84					2	1	1	1	1									
Essex	26	72	46			3	7	9	2	2			1	1		1					
Gloucestershire	12	73	44			2	3	5	1							1					
Hants & I.O.W.	22	67	50			2	6	5	2	2	1	2	2			1					
Herefordshire	9	52	60			2	1	2	2	2											
Hertfordshire	22	85	43			1	9	3	4		1		2	1		1					
Isle Of Man	2	40	40				1	1													
Kent	32	77	60				8	9	5	4	2	3				1					
Lancashire	11	182	189				1		1	1	1	1	1	4	1						
Leicestershire	13	68	55				5	3	1	2		1	1								
Lincolnshire	12	62	44			1	4	3	2	1				1							
London	12	126	85				2	1	1	4	1	1		1		1					
Manchester	11	119	72			1	1	1	3	1	1		1	1	1						
Merseyside & Cheshire	8	129	104				1		1	1	3		1		1						
Middlesex	12	63	63		1	1	3	1	3	1	1		1								
Norfolk	22	62	39		1	2	8	8	2	2			1								
North East	21	47	54				6	7	4	1	1			2							
Northamptonshire	11	133	78				1	2	3	1	2		1			1					
Nottinghamshire	10	69	68				3	1	3	2			1								
Oxfordshire	22	73	44			4	4	6	4	1			1	1	1						
Somerset	16	51	40			1	7	5			2	1									
Staffs & Shrops	12	67	48				5	3			2	1	1								
Suffolk	21	47	42			2	8	5	4	1		1									
Surrey	47	110	68			2	10	9	11	3	1	5	2	1	1		1			1	
Sussex	28	96	65			3	5	4	4	1	4		4	3							
Warwickshire	14	176	121			1		1	1		4	3		1	1	2					
Westmorland	2	102	102									1									
Wiltshire	15	65	56			2	1	7	2	2			1								
Worcestershire	12	49	32			2	6		1	2		1									
Yorkshire	35	106	47			2	14	2	2	1	1	1	5	5	2						
National	615	83	53		2	46	166	132	75	55	36	28	31	23	9	8	1	1	0	1	1