A Survey of Croquet Players

SUMMARY

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1. SUMMARY

1.1 Introduction

This was the third quinquennial survey of croquet players. **The objectives of the 2012 survey included**:

- **a refreshing of the data in the 2002 and 2007 surveys**, for on-going use, to attract sponsors and serve as a foundation for strategy and plans;
- **to measure what has changed in the last five years and to identify trends**;
- **to explore growth and recruitment issues**, and hence to support another major initiative being developed by the CA;
- **to focus on what its Associate members want from the CA** - both to satisfy existing Associates and to obtain clues of how to increase membership numbers.

Questionnaires were sent out with Fixture Books and an online version was also made available on the CA website. In order to ensure a good response from Non-associates, as well as CA Members, club secretaries were asked to seek respondents from among their members.

By 4th March (when the online response mechanism was closed), **708 online responses** had been received and **312 paper responses were entered into the database. Of this total of 1020 responses 527 had been logged from Associates and a further 404 were from Non-associates** (the remaining 89 being indeterminate, though they were still used in many analyses).

This response was very satisfactory; it **provided a very robust sample**. Various checks were made to see if there was any bias in responses, between those on paper and those received online, between older and younger respondents, between players of higher or lower standard, or by geographic location. **No significant bias was found**. Obviously there was a considerable difference in the responses to some questions between Associates and Non-associates, but in no analysis were these two subsets combined. In fact, in many cases their contrast was instructive.

Unlike in the two previous surveys, respondents were asked their geographic location by CA Federation. This enabled comparisons to be made between Federations. By analysing certain responses it was also possible to classify respondents as Competitive / Non-competitive (about one third being clearly neither) and Predominately AC / Predominately GC (about a quarter being neither). These too enabled interesting comparisons to be made.

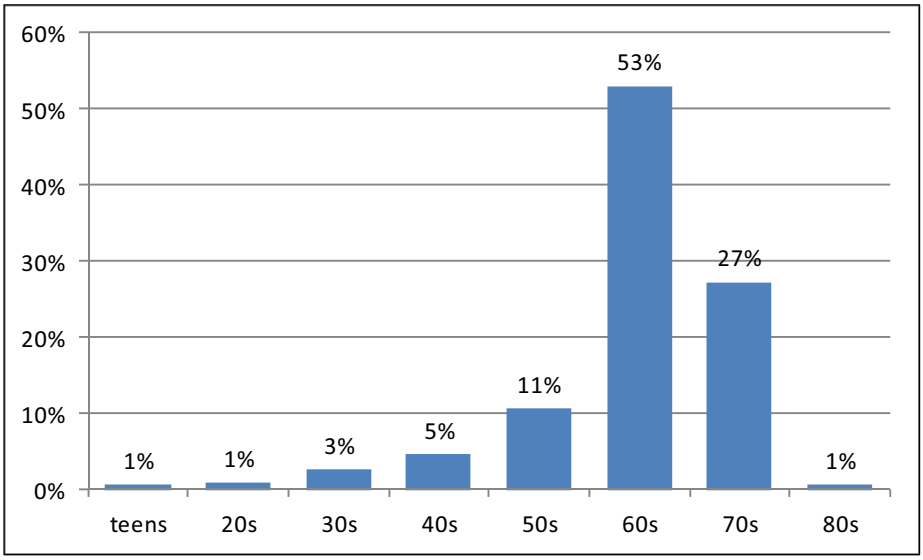
Various CA statistics were used alongside the analyses. These are highly informative in their own right. They can be seen in Appendix B.

Finally, at the end of the questionnaire respondents were invited to make any comments they wished. Over 500 separate comments were garnered - more than twice as many as in previous surveys! Besides adding colour to the dry numbers these provide a valuable insight into grassroots opinions on a range of topics.

Certain opinions expressed in this report are those of the author (Kevin Carter) and do not necessarily represent the views either of the CA as a whole or of the CA Marketing Committee.

1.2 Key Findings

The key finding from this survey came as a result of profiling recruits to croquet over the past five years (defined as joining a club for the first time in the last five years). **We have seen a major demographic shift**. Their age distribution is shown below:



81% of all new recruits are over 60 and the median age is 65. This is a huge worry.

In the 2007 survey we found the median age for all croquet players was 65 (i.e. half are below it and half above). Given that all of those who were recruited to croquet before 2007 have since aged five years and that many of the older ones have died or ceased playing in the intervening period, **we needed new, younger blood. We did not get it. Instead, the median age of all croquet players has now risen to 68.**

Taking the samples in 2007 and 2012 to predict the total number of players in croquet in each age band, we found that the number of under-50s dropped 26% - in just these five years! Indeed the under-30s almost halved, from 121 to 66 (out of 6110 members of clubs).

Of the new recruits, **we find that 49% are Non-competitive Players and 23% Competitive Players** (the remainder indeterminate). **62% are Predominately GC Players and 20% Predominately AC Players.**

If these trends are continued - if the next five years is like the last five, and then we have another five years of the same, and another - we can build a picture of what English croquet will look like in the future.

It seems that the trickle of players leaving the game increases for players in the 60s, and it becomes a flood for those in their 70s; **few croquet players remain in the game beyond the early 80s** (though some stay on to help out and socialise).

In 25 years most of today's players in their 50s will no longer be in the game, and almost none of those now in their 60s or older. This means that only a few hundred of today's players will remain and any others will have to be recruited in the meantime. **If the number of new recruits below middle age remains very low - as it was over the past five years - then croquet will be very different in 2037 compared to today.**

For one thing, **the pool of under-50s, which today contains most elite players which fill our national teams will have shrunk considerably**.

Over the past five years 80% of all new recruits were in their 60s or 70s. On average they will play croquet for a decade or so. This is considerably less than in the recent past, when almost a third in any snapshot had played for over twenty years and a sizeable minority for over forty.

Given the much shorter period for which most players will in future remain in the game, the rate of recruitment will have to roughly double from today's rate just to maintain similar total numbers; if it remains at the same rate then total numbers in 25 years will decline considerably.

As the ratio of Non-competitors to Competitive continues to grow and the ratio of Predominately GC players to Predominately AC players also does so, we shall see **a considerable fall in tournament and league entries and GC will dominate** croquet.

All of these things will happen if the trends continue. In fact, there is reason to believe they could worsen still further:

- Most new players are introduced to the game by friends and relations - like-minded people. So, an older playing population is more likely to recruit even more older players.
- Falling numbers of players in many clubs will damage their finances and their ability to maintain facilities, leading to closures and in some cases players having no alternative club.
- If tournament and league entries fall then there will be fewer tournaments and leagues, and so the necessity for long-distance travel will be greater, leading to fewer entries still.
- Now that AC and GC are roughly equally balanced in English croquet, we know that AC is being crowded out of some GC-oriented clubs. When GC is three times greater than AC we shall see a substantial fall in clubs offering <u>any</u> AC, meaning that many who prefer this variant will give up the game.

Turning to the effect on the CA, **a smaller number of players overall, along with an ever-decreasing proportion who are competitive and become Associates will put a strain on CA finances**. Its current model will be unsustainable in well under 25 years and it will have to change to survive.

Trends can be reversed. The most important is the demographic trend towards recruiting older people into croquet**. If the CA can restore its ability to recruit the young - definitely under 40 and ideally those of university or school age - then this alone will provide a solid platform. If the CA can additionally orient its recruitment towards more competitive players then its stated *raison d'être* will be fulfilled.**

1.3 Other Important Findings

Sex ratio

The proportion of females in croquet is trending downwards - 34% in 2002, 29% in 2007 and 27% in 2012. This is despite the fact that almost half of the still growing subset of GC players are female.

Federations

Overall, there are no great differences between the Federations. The SE Fed is slightly more competitive, while East Anglia and the North have the least competitiveness.

Comparatively, the SW and NW Feds are AC strongholds, while GC has a greater foothold in the South, E Midlands and Yorks & Humberside.

The NW fed has a greater proportion of females than elsewhere.

Education, employment and income

Each of our surveys has asked a variety of questions in this category. As usual, we have had many objections to our asking, largely on the grounds of their 'maintaining elitism'. However, **the main reason these questions are included is to establish data which will impress advertisers and sponsors. This data could be used rather more than it has been in the past:**

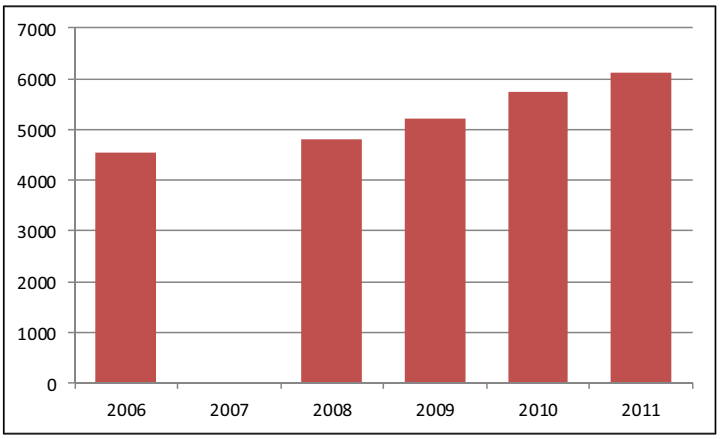
- 55% of respondents are graduates (a little lower for Non-competitive players and for Predominately GC Players).
- Three-quarters are retired and most of the rest are in full-time or part-time employment.
- 47% of all Associates are, or were before retirement, qualified professionals.
- The average household income of those in full-time employment is £67,000; the average household income of retired players is £37,000.

ICT (Information and Communications Technologies)

Almost all croquet players have access to a computer, broadband and e-mail. This is well ahead of national averages and it **means the CA could now communicate electronically directly with the majority of its membership, hence reducing costs considerably** (providing measures were in place to use traditional methods for the few who are not 'connected').

The CA website has further increased its popularity and use (while the Gazette remains the subject of some criticism). **The Publishing Committee should review the relative roles of the Gazette and the website.**

Croquet growth



Since 2007 the number of Member Clubs has increased from 142 to 185. This is because more clubs previously outside of the CA have become members and also because of some new clubs.

The number of members of CA Member clubs has increased 34% over the past five years, to 6,110. The increased number of clubs is one reason; another is successful recruiting, albeit concentrating on social players, mainly of GC.

Turning to **CA Individual Members** ('Associates'), we find a rather less spectacular increase: 1,640 at the time of the 2007 survey and 1,751 now - **a rise of 7% over the five years.**

Given this rise in the number of club players, allied to a much shallower rise in the number of Individual Members, **the ratio of CA Members to club members has been falling steadily. In 2002 it stood at 45%; by 2007 it had dropped to 36% and it is now 29%.**

This should be a cause of concern to the CA, with little over a quarter of players choosing to belong to their national association and every prospect of a continuing drop.

Types of croquet played

Respondents were asked how frequently they played various types of croquet: AC handicap, GC, Doubles, Matches, Tournaments, etc. Results were compared to those for the same question in 2007:

- **Among Associates the most popular variant, AC Handicap, has now almost been matched by GC** after the former has dropped back slightly and the latter has surged forward.
- **Friendlies are very popular among both Associates and Non-associates.**
- **Not many Non-associates play in tournaments within their own region** - only 3% frequently and another 12% occasionally. These statistics do not support the Feds' contention that they organise lots of local tournaments for clubs' more competitive Non-associates.
- **Only 16% of Associates play frequently in CA Fixture Book tournaments outside of their region.**

Influences on taking up and continuing to play croquet

Two questions have been asked in each of the three surveys and **there is no shift over time**.

The single greatest factor influencing players to take up croquet is the availability of a local club.

Consistent with the responses to an earlier question ("Have you introduced other people to croquet?"), we see that **spouse/partner, other relation and friend are all significant influences, especially if they were to be taken together as "introduced by another person".**

The sociability of croquet, meeting interesting people and the opportunity to make new friends is often rightly sometimes highlighted in recruitment. Getting fresh air and exercise is a very great factor. It is notable that the 'difficulty with other sports' factor, though significant, was not great.

Turning to the influences for continuing to play croquet, the factors which come to the fore are croquet's appeal to competitive instinct and the desire to improve, along with fresh air and exercise, sociability and meeting people.

The analyses were also rerun to test any differences between Predominately AC / GC Players. Competitive instinct, intellectual challenge and desire to improve game are all much higher for AC than GC.

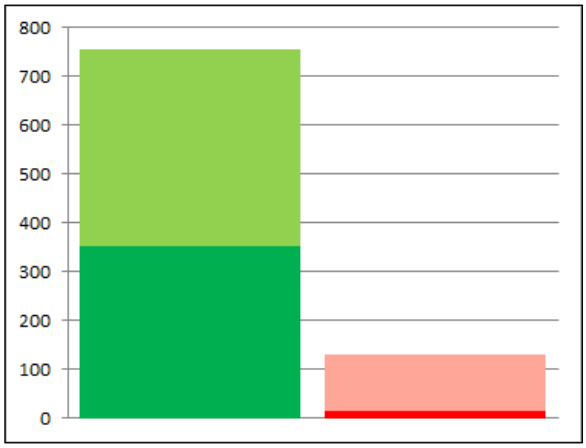
Opinions

Sixteen questions were put to respondents to see how much they agreed or disagreed with various issues, many relating to CA policies. One set was to do with growth and recruitment issues:

- Overwhelmingly, respondents say the CA is right to promote competitive croquet more strongly that social play.

- We had an immense agreement (see right - green is agree, red is disagree; dark is 'strongly') that the CA need not concern itself with promoting non-competitive or social croquet; this is the job of the clubs.

- Another very strong result told us that the CA should concentrate on recruiting likely competitive players.



These last two results were rerun for Non-competitive players only. Results show that such players often feel they don't need the CA to take a hand in what they want out of croquet.

- Most players want croquet to grow substantially.

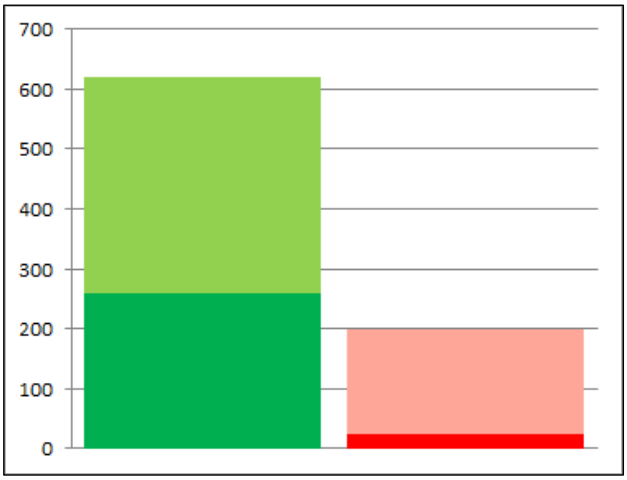
Overall, these results do provide a mandate to the CA to formulate an aggressive Growth and Recruitment Strategy which concentrates on recruiting into the game more people who are likely to play competitively.

- Two questions addressed social croquet stifling competitive play. The results show that there is evidence of social croquet stifling competitive play, but it might not be as strong as anecdotal evidence suggests.
- When asked whether **the CA should run coaching courses to introduce AC to GC players**, we saw a very positive response, and surprisingly this was almost as great for Predominately GC Players as for others.

A further set of questions addressed financial issues:

- One addressed club finances and results suggest that the finances of many clubs remain precarious and the first priority is to get in more members.
- The next showed that over half of respondents thought that CA funds should be strengthened in order that they can be used for development and recruitment.
- Over 50% of respondents are prepared to pay more for croquet - club subscriptions, tournament fees, etc. [In commercial surveys any suggestion of price increases is generally met with a clamour of dissent. 50% should be seen as a huge positive.]
- CA Individual Tournament Membership is seen as good value.
- CA Club membership of the CA ('Capitation Fee') is seen as good value.

These responses taken together demonstrate considerable price elasticity in croquet. They suggest that the CA should raise more and spend more.



Lastly - see left, three-quarters of respondents (including almost half being Non-associates) felt **the CA should be concerned that little over 25% of all players joined as Individual Members.**