



CEO Review of 2017/18

6 October 2018

TEAMWORK | OPEN TO ALL | COMMITMENT

KEY STATS

THE ROWING COMMUNITY

179,000

row twice a month on-water

626,000

row twice a month indoor

30,000+

British Rowing members



30%

Of rowers have been members of their clubs for over 10 years

562

Affiliated clubs

236

Affiliated events each year

SUCCESSES

9%

More British Rowing members since 2012

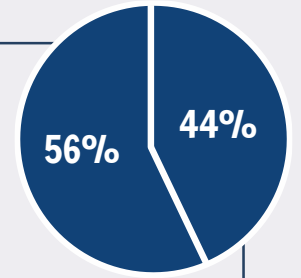
77%

More female members in the past 10 years

59%

Of members aged under 25

Male
British Rowing members



Female
British Rowing members



OUR STRATEGIC OBJECTIVES



**GROW THE NUMBER
OF PEOPLE IN
ROWING**

**MAXIMISE THE
VALUE OF
THE SPORT**

**PULL TOGETHER:
ONE TEAM WITH A
SHARED PURPOSE**

**BE THE LEADING
ROWING NATION AT
OLYMPICS &
PARALYMPICS**

**CREATE AND EMBED
PATHWAYS TO
DEVELOP TALENT**

OUR ROLE AS A GOVERNING BODY

						
Support rowing clubs and their infrastructure	Support events and the competition framework	Administer membership, club and event affiliation	Develop targeted products & programmes	Promote volunteering in the sport	Conduct research and provide insights	Help develop umpires and officials
						
Train and select the GB national teams	Identify and develop new talent	Provide training and education for coaches	Promote all forms of rowing to all participants	Represent rowing on the international stage	Provide a series of national championships	Ensure a clean sport with integrity

OUR MARKET



Sliding Seat Rowing

1. School age community club rowers
2. School club rowers
3. University club - existing rowers
4. University club - new rowers
5. Young community club rowers
6. Active workers
7. Trailing parents
8. Kids flown the nest
9. Active retirees
10. New daytime adult rowers
11. Coastal sliding seat rowers

Current Core

Future Core

Non-Core



Fixed Seat Rowing

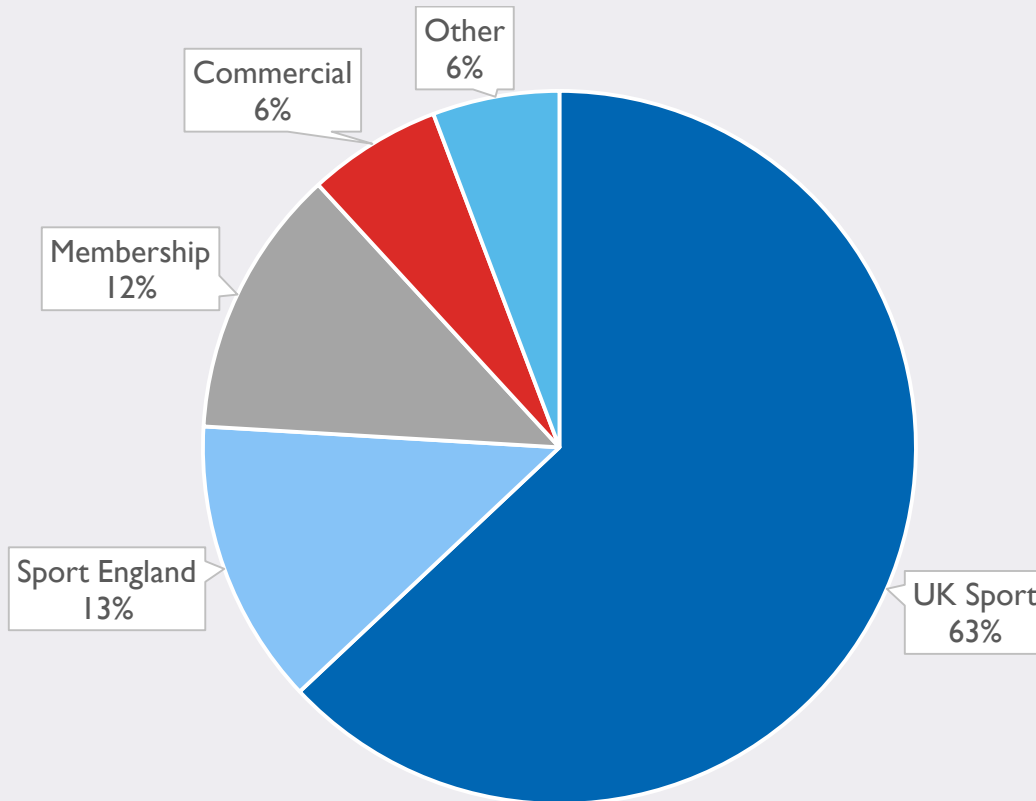
1. Sea Cadets
2. Cornish Pilot Gig Association
3. Cornwall Rowing Association
4. Other fixed seat rowers - inland & coastal
5. Inland fixed seat rowers – inc. skiff
6. Watersport centre fixed seat rowers
7. Other youth / school groups
8. Surf rowers
9. Thames Traditional Rowers
10. Park boat hire centres



Indoor Rowing

1. On-water rower
2. School Gamer
3. UIRS rower
4. Health & fitness - class lover
5. Health & fitness - gym regular
6. Health & fitness - home rower
7. College rower (FE+HE)
8. First step to fitness rower
9. Hardcore indoor rower
10. Fitness focused rowers
11. Cross-Fit rower
12. Corporate workplace rower
13. Functional fitness rower

OUR INCOME & EXPENDITURE



- £12.1m spend
- £411,000 planned budget deficit
- 76% public investment
- Constraints around expenditure and budget lines
- Competitive commercial environment
- 'More for less' culture

CHANGE IS THE NEW NORMAL

Over the last year British Rowing has...

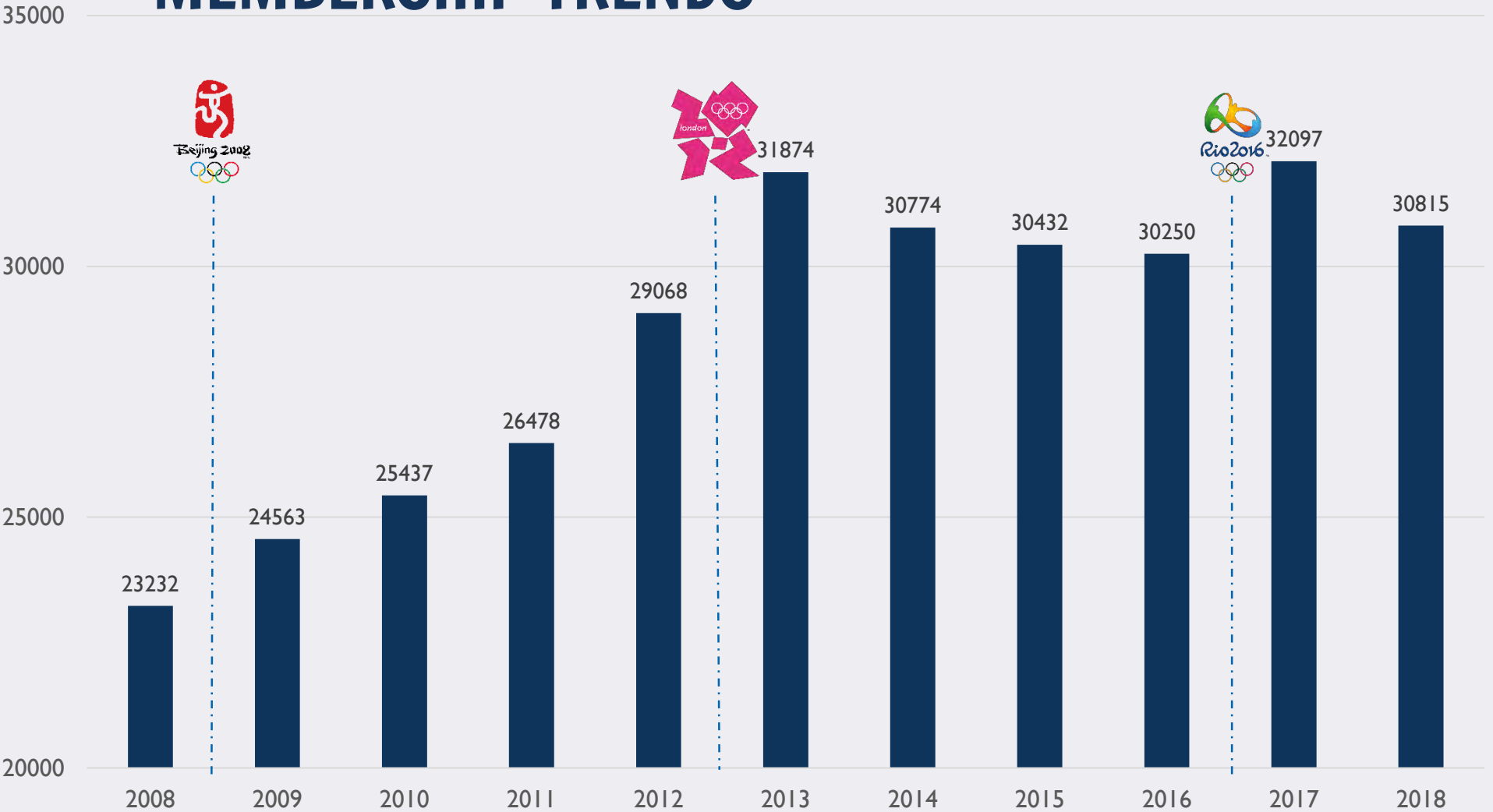
- Appointed new Chairman
- Embedded senior management structure
- Recruited new Director of Performance
- Complied with the UK Sport Code of Governance, including replacing Council with Regional Chairmen Forum
- Developed and introduced a new national Competition Framework
- Seen a large number of our senior athletes retire post-Rio 2016
- Worked with variety of partners



GROW THE NUMBER OF PEOPLE IN ROWING

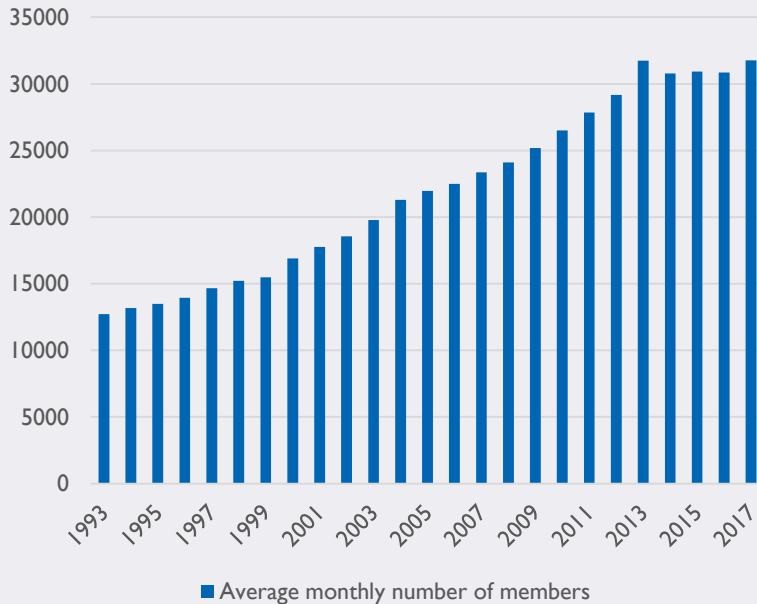


MEMBERSHIP TRENDS



MEMBERSHIP GROWTH

British Rowing Members by year



Declared Club Members by year

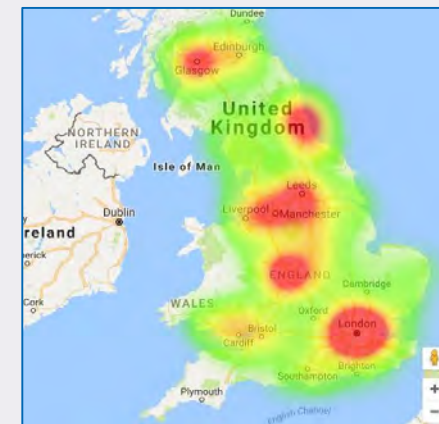
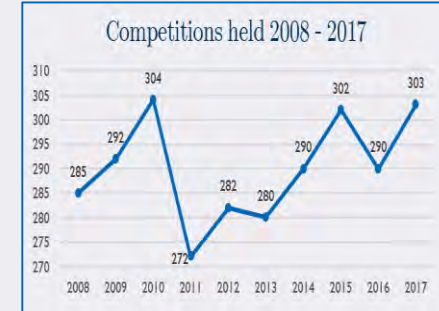


- 2017 was a record year for both British Rowing and affiliated club membership
- However, growth in both types of membership have generally slowed since 2013

MEMBERSHIP ANALYTICS



- Analysis limited to provide monthly headline membership figures
- To understand changes in our memberships we need to understand where and why they are taking place
- SAS partnership developing our internal analytics capability, with funding from Sport England
- Exploring ways to easily visualise and understand:
 - Membership trends at a club, regional and national level in terms of growth and retention
 - Opportunities for growth across the demographic: age, gender, disability & diversity
 - Easy to access dashboard with current data available for interrogation



MEMBERSHIP OFFER

British Rowing membership will evolve from Platinum, Gold and Silver to a new four-part membership structure

RACE



For rowers who compete in British Rowing competitions

ROW



For coastal, gig, recreational club

COACH



For coaches with a British Rowing qualification

SUPPORT



For umpires, volunteer coaches and club volunteers



MEMBERSHIP CAMPAIGN

- Commissioned an agency to develop a concept
- To create connection between British Rowing and the wider rowing community
- Is emotive, incorporating elements of the sport that rowers value
- Is equally relevant to all disciplines of the sport
- Has a distinct message that British Rowing can 'own', across all media
- Is adaptable for use beyond the promotion of membership

CLUBHUB PORTAL

- An online club member management portal
- Comprehensive 'how to' guide to running a rowing club, with best-practice content
- Available to all clubs as a benefit of their affiliation to British Rowing
- Includes:
 - Club Management
 - Membership Management
 - Payment handling
 - EA Boat Registration & Management
 - Team Management
- 23 clubs from across the country involved in project pilot



GO ROW INDOOR

- Indoor Forum 50+ members
- Online content incl. training plans
- Go Row Indoor videos x 7
- Go Row Indoor Newsletter x 9
- Industry & consumer campaigns - Helen Glover fronted #SheRows Oct 2018
- Go Row Indoor Club roll-out (post 3 club pilot)
- Power8 Sprints Pre-event Challenge
- Significant fit-tech sector investment interest
- National College Fitness Event
- New school strategy & Level 4 School
- GB Team at 2017 World Games

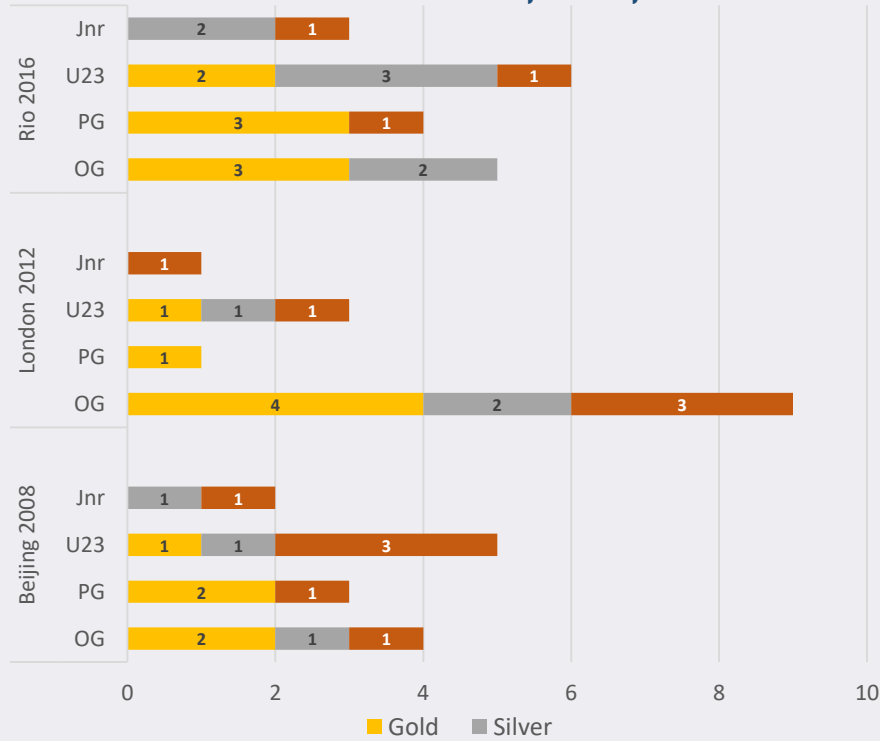


BE ONE OF THE LEADING ROWING NATIONS



PAST GAMES

Medals won in 2008, 2012, 2016



GB ROWING TEAM IN 2018

Juniors

- Outstanding performances
- United athlete group, supporting each other and the staff team
- Cohesive and collaborative coaching team

U23s

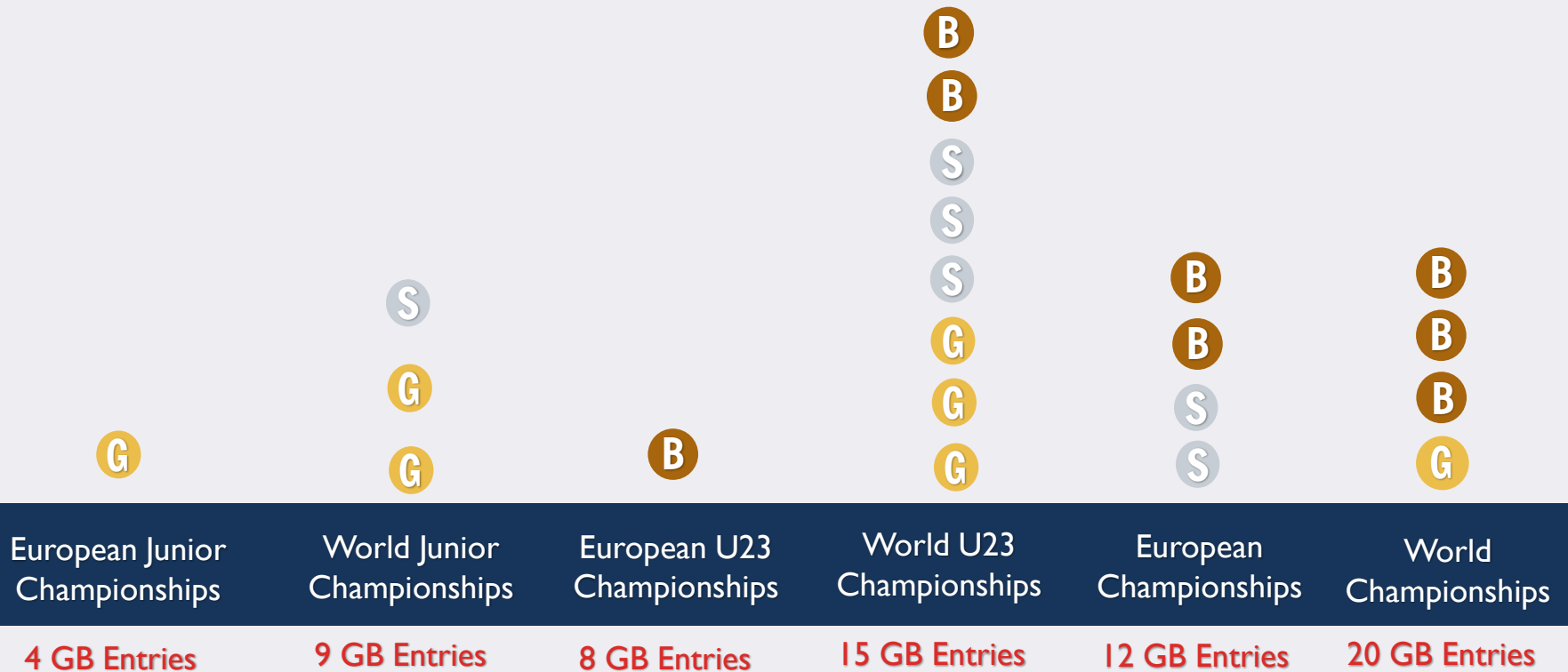
- Best ever result at a world championships
- Cohesive athlete team coming together from clubs, British and USA universities
- Incredible standard of racing is exciting for the future of rowing

Seniors

- New talent coming through
- Currently in strong 'qualifying' position
- Challenge is to convert this to medals



GB ROWING TEAM RESULTS 2018



THE TEAM IN ACTION

- Gavirate Para-rowing Regatta
- World Rowing Championships
- European Rowing Championships
- World Cup I, II, III
- World U23 Championships
- European U23 Championships
- World Junior Championships
- Coupe de la Jeunesse
- GB vs France match
- Munich Junior Regatta



A NEW CULTURE

- Critical to evolving the culture will be the programme's end of season 'review', renamed 'Programme Self 360'
- The key principles that will underpin this are:
 - Discovery before delivery
 - Engagement not compliance
 - Strategic intent driving process
- Key outcomes will be
 - Developing 'collective accountability' to the programme objectives
 - Evidencing the value in the contribution of 'self', 'others' and the 'system'

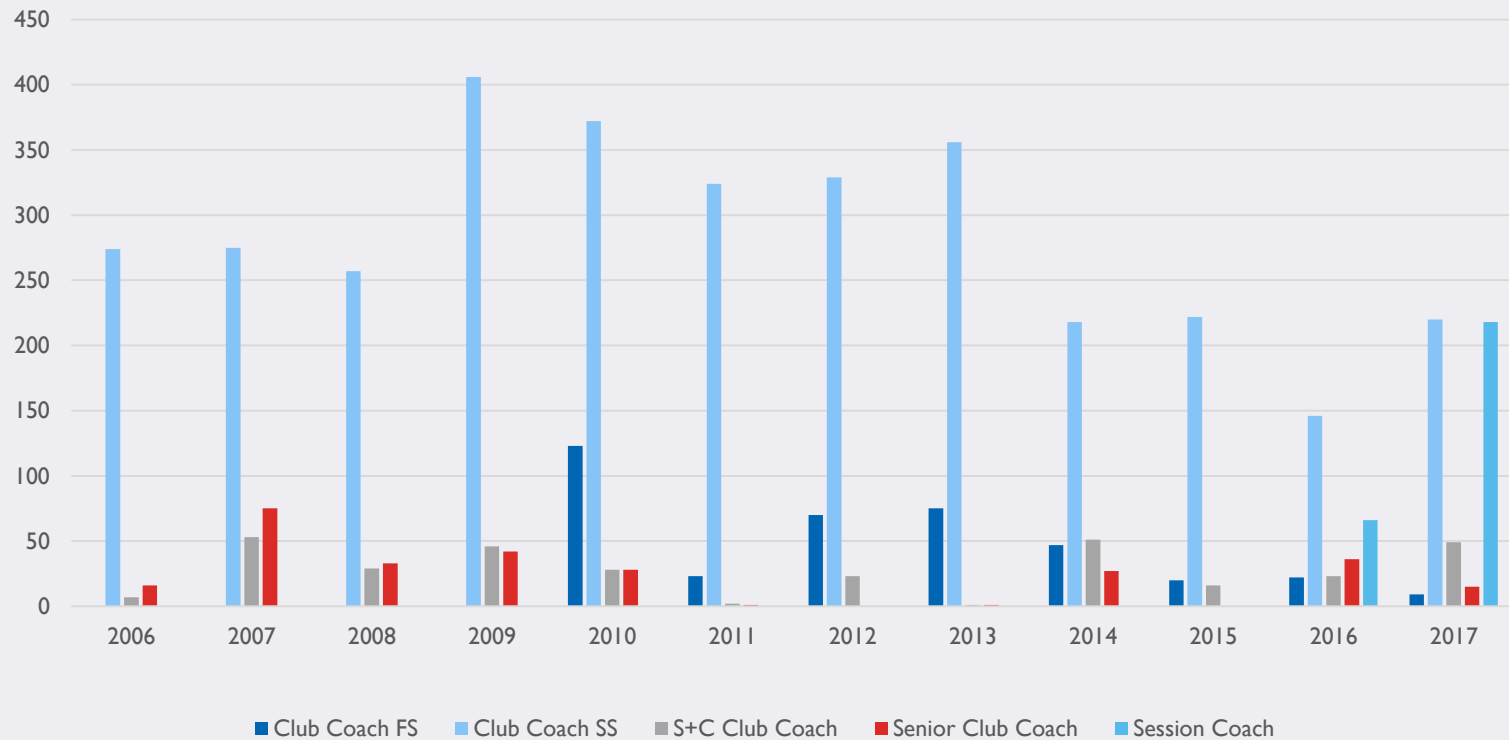


CREATE AND EMBED PATHWAYS



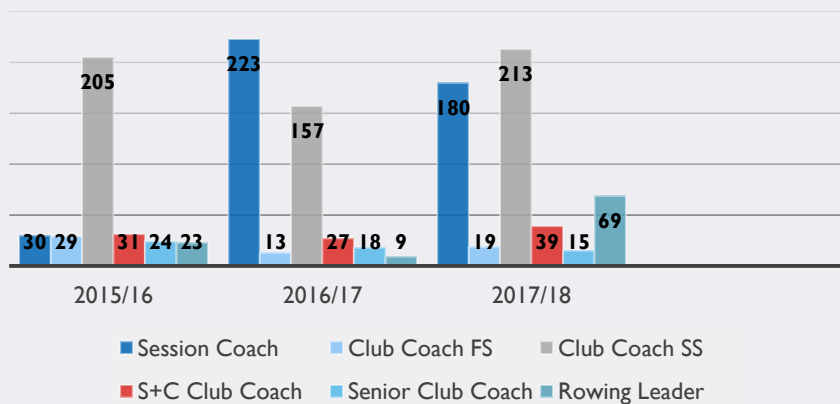
COACH EDUCATION TRENDS

Total number of coaches being trained 2006-2017

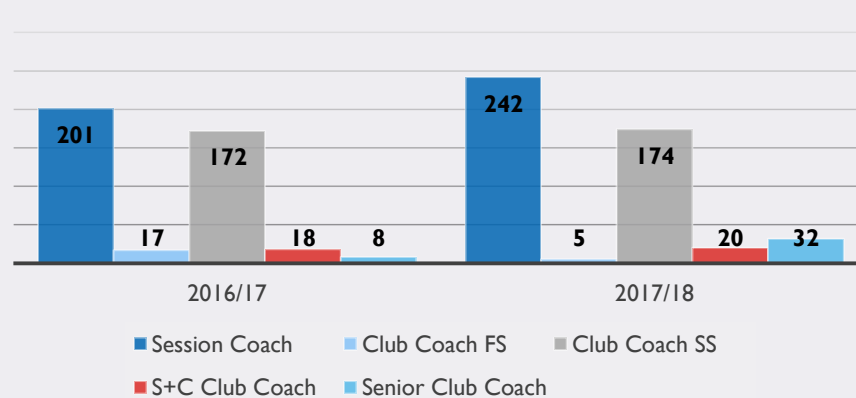


COACHING COURSES & COMPLETION

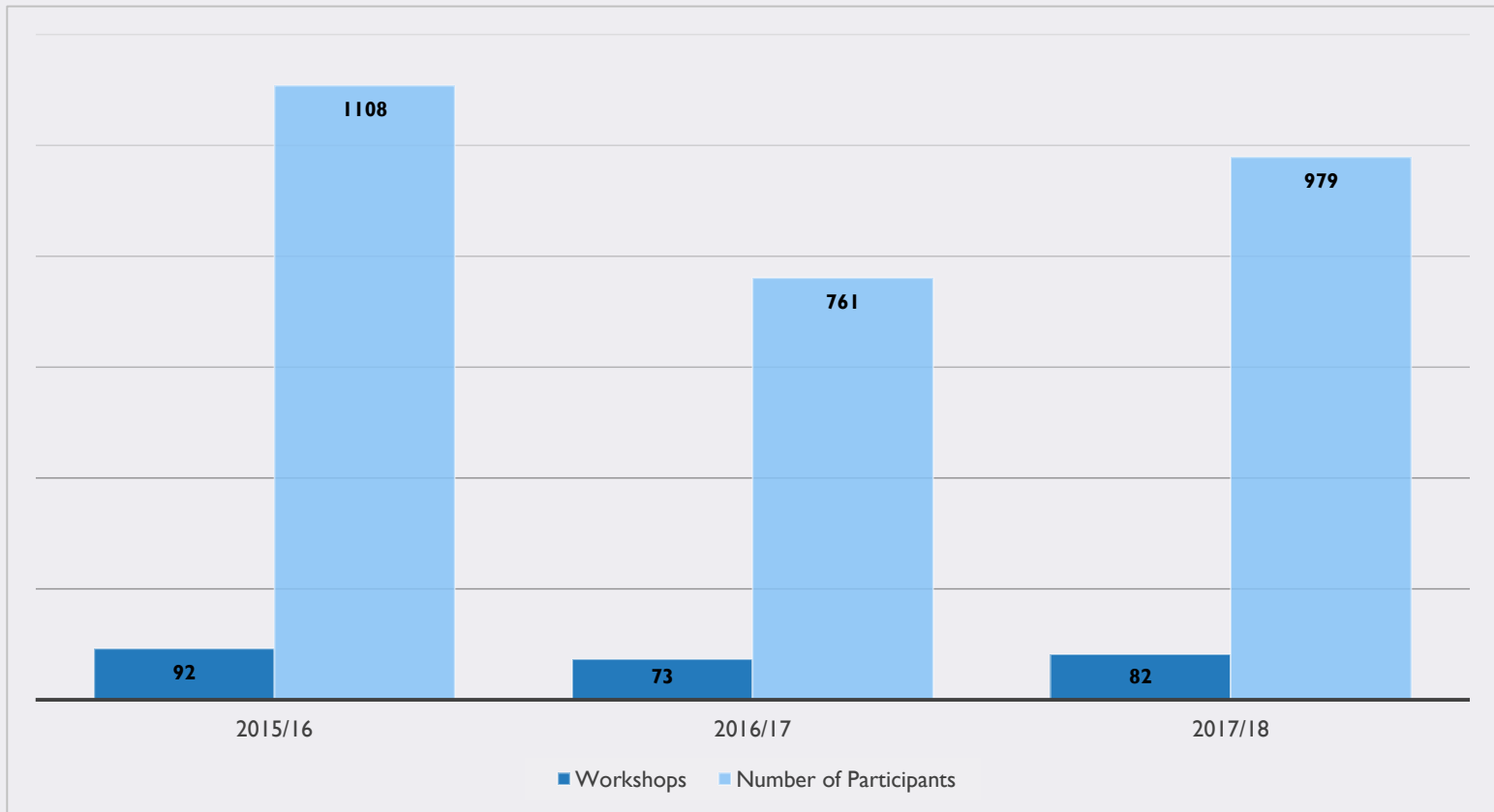
Number of Coaches being trained 2015-2018



Qualification Completions



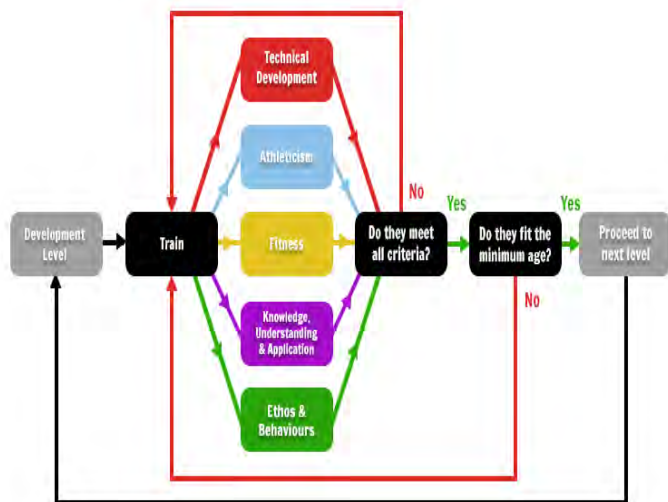
EDUCATION & TRAINING





ROWER PATHWAY

- New interactive Rower Development Guide launched in December 2017
- Provides practical advice for rowers, coaches and parents
- Focusses on five basic principles for rowing.
 - Physical Literacy
 - Athleticism
 - Fitness
 - Knowledge, Understanding & Application
 - Ethos & Behaviours
- Version 1.3 launched October 2018



NEW COMPETITION FRAMEWORK

- Status Points replaced by Ranking Points
- Personal Ranking Index launched for every competitor
- BROEI (British Rowing Online Entries System) replaced by BROE2 with a much improved user experience
- Comprehensive communications plan rolled out to reach all members
- SAS Analytics project underway to independently review the Framework algorithm

317
competitions
run on **BROE2**
to date

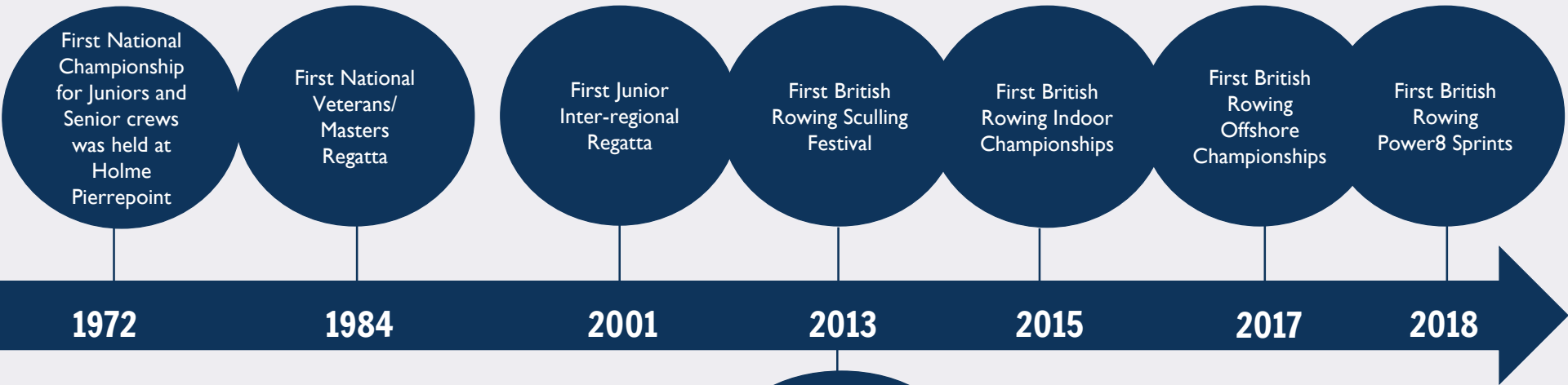
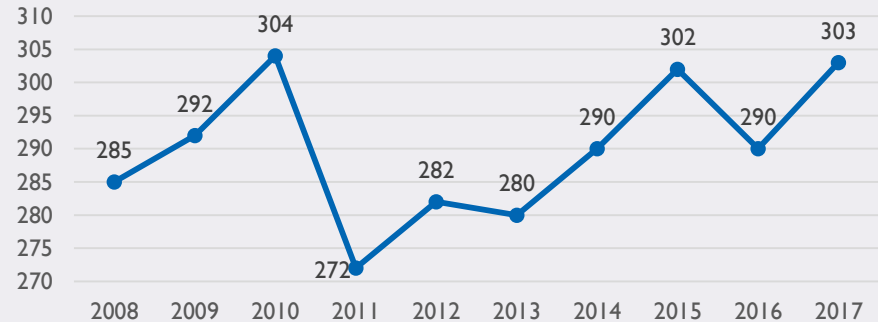
80K
crews entered
through
BROE2

£2.2m
payments made
through
BROE2

COMPETITION TRENDS

- The number of competitions held between 2008 and 2017 increased by 6%.
- On average competitors (Gold BR members) compete in 6.2 competitions per individual per year

Competitions held 2008 - 2017



Senior & Junior Champs become separate events

CHAMPIONSHIPS & EVENTS



ENGLAND TALENT PATHWAY



STEWARDS' CHARITABLE TRUST

- SCT Coaches 2016-2018
- 7 coaches across the UK
 - Tees Rowing Club | Dorney Lake: | Glasgow | North Wales: Bristol | Lea Rowing Club | Warrington Schools
- Projects aimed at those who would not normally try rowing
- 40 schools involved
- 2921 pupils involved
- 31 different organisations engaged
- 2018-2020 - 4 coaches recruited across the UK
 - Sunderland RC | Dorney Lake | Star Club Bedford | Ahoy Centre London



MAXIMISE THE VALUE OF THE SPORT



DIGITAL CHANNELS

- Total following: 119,702., up 13% compared to 2017
- Instagram and YouTube are our fastest growing channels
- Over 160,000 views of our 20-minute indoor rowing class videos
- 62,000 average monthly unique users for www.britishrowing.org
- 23% of users are new to the website
- 348 stories published on the website (one a day)



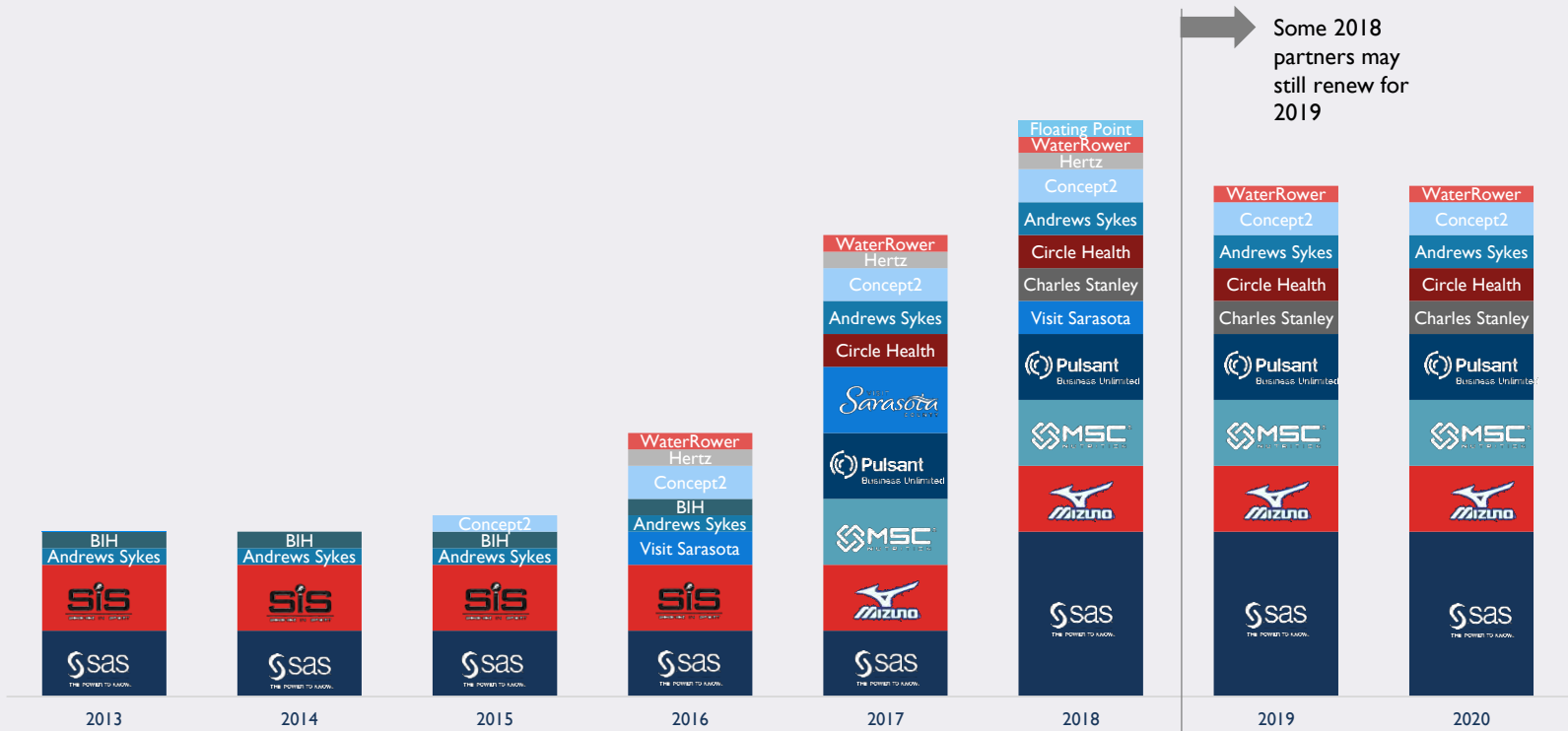
ROWING & REGATTA

- Six themed issues a year
- Oct/Nov 2017 – Indoor Rowing
- Dec/Jan 2018 – Technology
- Feb/March 2018 – Head Racing
- April/May 2018 – Volunteering
- June/July 2018 – Summer regattas
- Aug/Sept 2018 – Adaptive Rowing

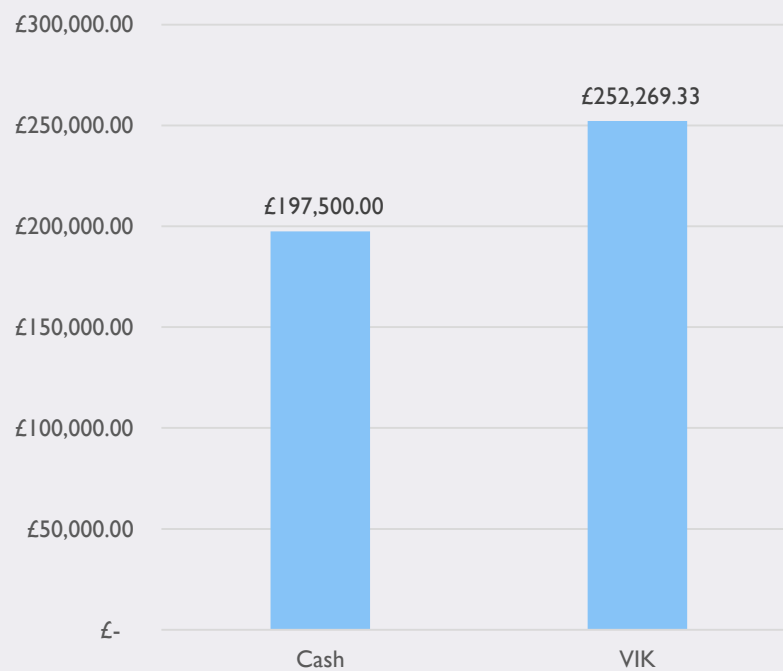
	2018	2017
Total Circulation	27,842	28,919
Print	19,414	22,386
Digital	8,428	6,533



PARTNERSHIP GROWTH



COMMERCIAL INCOME



Total Partnership Sales Revenue 2018/2019

PARTNER ACTIVATION

- Creating a visualisation & analytics platform
- Supported by Sport England and SAS
- SAS visual analytics software now installed
- 3 initial data projects underway:
 - National data analytics
 - Ranking points index optimisation
 - Performance athlete longitudinal profiling
- SAS relationship stronger than ever



RETAIL & LICENSING

- Launch of British Rowing's first replica range
- Licensing income continuing to look strong in 2018/19
- Need to keep refreshing range to maintain long term interest and drive sales online
- Current customer base is quite price sensitive
- Licensing opportunities to utilise British Rowing IP with international and national partners



POWER8 SPRINTS

- New format, new property
- 350m city centre sprint racing
- Bristol Harbour Festival Headline Act, 28,000+ spectators
- 2.5hr Live Broadcast
 - BT Sport
 - BBC Online
 - Facebook
 - 24,500+ live audience
- Gillette World Series feature - 201 territories, 118 broadcasters
- Fanzone – 755 row sessions in 2 days
- Pre-event challenge in local gyms (2750 entries) and schools (27 schools/1113 young people)



BRITISH ROWING FOUNDATION

- Charity Commission registration September 2018
- Independent Board of Trustees, British Rowing support
- Grant fund and support target community projects
- Host an Alumni Club for former/ current National Rowers
- Focus on
 - Young people in education (particularly State Schools)
 - People with disabilities
 - BAME/other underrepresented groups
 - Disadvantaged/ low income communities
- To use the transformative impact of rowing to change lives

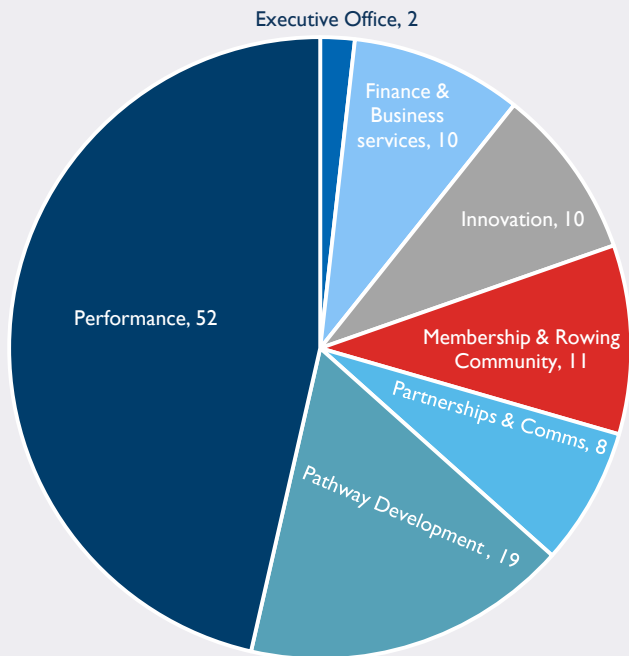


PULL TOGETHER



STAFF & COMMITTEES

British Rowing Staff - 2018



2012

5 Standing Committees

Executive, British Rowing Championships, National Coaching, National Competition, National Development

8 Sub-Committees/Panels

Finance, Rules, Medical, Water Safety, Multi-lane umpiring, Junior, Masters, National umpires.

2018

11 Committees/Standing Committees

Audit & Risk, Finance, Sport, Event, Junior Rowing, Masters Rowing, National Coaching, National Competition, National Umpiring, Recreational Rowing, Rowing Safety

8 Advisory Panels

Anti-Doping & Integrity, Grievance & Disciplinary, Magazine Management, Medical Advisory, Multi-Lane Umpiring, National Facilities, Rules of Racing, Safeguarding Vulnerable Groups



INVESTORS
IN PEOPLE

Accredited
Until 2020

STAFF & VOLUNTEER WORKING

- New Competition Framework
- Adaptive Rowing Strategy
- School Rowing Strategy
- Power8 Sprints
- Go Row Indoor
- British Rowing Charitable Foundation
- ClubHub
- Volunteer Strategy (starting late 2018)
- Insight & Data Analytics
- Advertised 103 jobs for our member clubs, rowing Home Nations and clubs in the Home Nations



SAFEGUARDING

- Updated Code of Conduct and Whistle-blowing Policies
- Reviewed Safeguarding policies and guidance documents, for publication later this year
- Participated in Child Protection in Sport Unit's (CPSU) review of safeguarding case management practice
- Rated 'Green' by CPSU against their Safeguarding Framework
- Continued to provide 1:1 support to club Welfare Officers



RESEARCH & STRATEGIES

- Insight led decision making underpins all activities
- GoRowIndoor
 - 2CV Indoor Segmentation
 - OneFifty Social Media
- Nielsen Sprint Event Research
- Membership Survey
- Coaching Strategy
- School Rowing Strategy
- Investors in People
- Adaptive Rowing Strategy (2018)
- Volunteer Strategy (2018)

Treasurer Secretary "thought
ndly inspiration
dedicated Safety Advisor "patiently organi
CWO puts us first" motivator "e
distributed immensely" Leader organi
Caterer "natural dedication" Leader organi
ire incredible effort passionate always
nsung here
fun
ys takes time" Boatman Fundraiser Eve
"enthusiasm to inspire" Captain





CLUBHUB
GUIDES

Inclusive Club Guide

How to make your club more inclusive and diverse.



DIVERSITY & INCLUSION

- A commitment to change
- Mixed success in our goal to be open to all
- Poor engagement by BAME, lower socio-economic groups & people with disabilities
- Research identified attitudinal & practical barriers
- Inclusive Club guide launched April 2018:
- Significant work ahead
 - Promote adoption of the guide
 - Embed principles across all BR activities – events, products, recruitment, partnerships

CONCLUSION & QUESTIONS





BRITISHROWING

Annual General Meeting

6 October 2018

TEAMWORK | OPEN TO ALL | COMMITMENT

British Rowing would like to remember those we have lost in the last 12 months and thank them for all they have done for the sport

Rodney Bewes (London RC), Brian Eddy (Maidstone Invicta RC), Des Kelly (Leeds RC), John Partridge (Derwent RC), John Pascoe (Torquay RC), Jim Railton (Former Times rowing correspondent), George Saunders (Erith RC), Phillip Searle (Tees RC), Francis Smith (Marlow RC), Peter Wass (City of Sheffield RC), Martin Brandon-Bravo OBE (Nottingham & Union RC), Raymond Butt (Kings School, Canterbury & Fitzwilliam College, Cambridge), John Clay (London Rowing Club), Paul Dare (Kingston Rowing Club), Noel Davison (Cygnet RC), Brian Ellis (Champion of the Thames RC), Christopher Gomm (Leander Rowing Club), Jimmy Harrison (Talkin Tarn ARC), Michael Lapage (Silver Winner GB Olympic eight 1948 London Games), Mike Long (Thames RC), Anthony Ross (Thames RC), John Singfield (Star RC), Rob Van Mesdag (London RC), Tim Wilson (Thames RC and Tees RC), Stuart Wilson (Upper Thames RC), Richard Wood (Trentham Boat Club)