

Indoor Rowing Strategy

2015-17

Version 2.0

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Organisational Context

According to the British Rowing Articles of Association, British Rowing is established to “*act as the governing body for the sport of Rowing in England*” where “*references to ‘rowing’ shall apply also to sculling and coxing, and any activity in which a rowing action is used with any boat, machine, ergometer or other apparatus*”. Equally, FISA considers itself the International Federation for the development of rowing “*in all its forms*” and recognises British Rowing as the National Federation for rowing in Great Britain.

British Rowing’s mission is to lead, enable and inspire excellence in rowing at all levels.

British Rowing’s vision is:

Through rowing, promote the positive impact of sport, by providing an enjoyable experience for all participants while upholding our position as a leading rowing nation.

British Rowing has five strategic objectives:

- Grow the number of people in rowing.
- Be one of the leading rowing nations at the Olympic and Paralympic Games.
- Create and embed pathways to identify and develop talent.
- Maximise the value of the sport.
- Pull together: One team with a shared purpose.

With a large number of under-utilised rowing machines around the country, Indoor Rowing has the ability to deliver across all five of these strategic objectives as set out in Appendix A.

Rationale of Indoor Rowing Engagement

- British Rowing provides national perspective and authority to rowing in England
- British Rowing has technical credibility on skill development in indoor rowing
- British Rowing can take an independent user based view of the market to help improve participants' experience of the rowing machine
- British Rowing is recognised as the national federation for rowing by FISA
- British Rowing can utilise the GB Rowing Team as an inspiration for indoor rowing

Vision for Indoor Rowing

British Rowing's vision for Indoor Rowing is to accelerate the development of indoor rowing to improve the health and fitness of the nation, based on the following:

- Indoor rowing has activities, equipment and infrastructure that allow widespread and inclusive use and enjoyment of indoor rowing and therefore growth in indoor rowing participation
- Indoor rowing is recognised as a discipline of the sport (internally and externally) with pathways for people to develop their talent and to transition between different environments
- The benefits of indoor rowing (fitness, health and societal) are widely known and the rowing machine is commonly used to deliver these benefits
- British Rowing plays a leadership role in indoor rowing, actively engaging with indoor rowing participants and suppliers/operators

Objectives

EXPERIENCE	<p>Develop products, activities and innovations to improve the user experience of indoor rowing and overcome barriers to participation such as:</p> <ul style="list-style-type: none"> • ‘fear’ of the machine caused by lack of technical knowledge around how to get best results from the machine • confusing nomenclature and figures • lack of engaging content whilst on the machine
PROFILE	<p>Increase profile of indoor rowing in the leisure and health industry and increase profile of British Rowing as the lead agency within indoor rowing.</p> <ul style="list-style-type: none"> • Indoor rowing is understood and profiles highly in fitness and awareness of rowing machines, benefits and technique • British Rowing is high profile in indoor rowing and leisure industry • British Rowing regularly and directly engages with consumers and suppliers
REVENUE	<p>Generate a revenue stream from indoor rowing which makes the sport sustainable and allows reinvestment into growth and innovation</p> <p>British Rowing engages appropriate partners to help deliver the strategy as efficiently as possible in terms of budget and resource.</p>
COHERENCE	<p>Participants are able to move between different environments (e.g. school, university and adult life) and maintain an awareness of the opportunities that indoor rowing can provide (such as the School Games, University Indoor Rowing Series and gym rowing).</p> <p>Ensure that in all indoor rowing environments, participants have access to appropriate training, coaching, activity guidance and supporting events.</p> <p>Embed indoor rowing into existing pathways and develop a competition framework in conjunction with other partners which positions the British Rowing Indoor Championships as the premier event in the indoor rowing calendar.</p> <p>Help participants develop their talent and, where appropriate:</p> <ul style="list-style-type: none"> • Represent their country at international level (indoor rowing) • Integrate indoor rowing athlete pathways with water rowing pathways

For the avoidance of doubt, although some indoor rowers may transfer to the water, the objective of British Rowing is to grow indoor rowing in its own right rather than to grow water rowing through indoor rowing.

Market Context

The current indoor rowing market can be segmented into six key groups:



** Functional fitness describes those using indoor rowing for fitness for another activity, be that another sport or a job role (i.e. military or emergency services)*

Each of these groups (with the possible exception of ‘hard-core’ indoor rowers) exist within a larger market which might not currently participate in indoor rowing. Over the last couple of years British Rowing has been looking to develop greater knowledge of each of these larger markets to help understand the growth opportunities for each segment. An outline of existing understanding of each segment is contained as Appendix C.

Overview of Workstreams

To deliver the objectives set out this strategy British Rowing intends to carry out a number of workstreams:

Experience

- Develop and market innovative products to grow the proportion of gym goers using the indoor rowing machine (currently the RowActiv project)
- Provide tailored training for the fitness sector to help ensure fitness instructors/personal trainers understand and promote the use of the rowing machine
- Develop mass participation opportunities in indoor rowing through digital channels
- Continue to develop opportunities to allow a wide range of participants to take part in indoor rowing particularly people with a disability
- Develop an 'accreditation' product for facilities offering indoor rowing – covering equipment, instructor training and activity plans

Profile

- Continue to deliver the British Rowing Indoor Championships as a flagship indoor rowing event in the country
- Support and encourage the development of an enhanced spectator and participant experience of indoor rowing, delivering innovative sports presentation at the cutting edge of sport
- Engage with organisations in the leisure and health industry (including health professionals) to ensure the benefits of indoor rowing (fitness, health and societal) are well known within the leisure and health industry
- Develop packages/products (e.g. membership offering, subscriptions and mailing lists) to regularly engage indoor rowing participants with the British Rowing brand
- Engage partners who can help grow the profile of indoor rowing and British Rowing such as equipment manufacturers and gym chains

Coherence

- In partnership with existing indoor rowing events (including School Games, English Indoor Rowing Championships, University Indoor Rowing Series, National Junior Indoor Rowing Championships) and the home nation events, develop a competition framework that supports continued participation in the sport and talent development with the British Rowing Indoor Championships positioned as the premier event in British Indoor Rowing.
- Ensure appropriate infrastructure (for example, software and training) exists to support organisations delivering these frameworks.
- Facilitate participation of British entrants at international indoor rowing events (for example, the World Games and European Indoor Rowing Championships – more detail in Appendix B).

Appendix A: Indoor Rowing & British Rowing's Strategic Objectives

Grow the number of people in rowing

There are at least 200,000 Concept2 rowing machines around the country, very few of which are being utilised to maximum capacity. This combined with the fact that indoor rowing is an effective way to achieve many common fitness goals means that indoor rowing presents an attractive opportunity to grow the number of people in rowing.

Be one of the leading rowing nations at the Olympic and Paralympic Games

With hundreds of thousands of people getting on an indoor rowing machine each month, there is potentially talent that exists within that community. By building more engagement within this group, it may be possible to identify individuals who may be talented water rowers.

Create and embed pathways to identify and develop talent

Putting to one side the connection to the Olympic and Paralympic pathways, it may be possible to support individuals to develop their talent purely using the indoor rowing machine (for example at the World Games).

Maximise the value of the sport

Indoor rowing is a flexible activity in comparison to water rowing and can be delivered in a variety of locations. This opens up the option of using it to boost the profile of rowing and British Rowing. There are a large number of participants involved in indoor rowing who could be more closely engaged with British Rowing.

Pull together: One team with a shared purpose

Indoor rowing is a key area that reaches right across the organisation and presents opportunities for collaborative working.

Appendix B: International Indoor Rowing Events

Event	Next Host	Frequency
World Games	Wroclaw, Poland 20-30 July 2017	Quadrennial
C.R.A.S.H.-B. Sprints (<i>de facto</i> World Championships)	Boston, US March 2016	Annual
European Indoor Championships	Gyor, Hungary 16-17 Jan 2016	Annual

Appendix C: Our Understanding of the Market



Water Rowers

British Rowing has a good understanding of the overall picture of the market for water rowing which is described in other documents. We are not specifically looking to grow the general number of water rowers doing indoor rowing as there is little return on investment against the British Rowing strategy

Gym Goers

The gym market can be segmented into the following 5 groups based on their exercise goals: 'appearance', 'health', 'performance', 'medical' and 'enjoyment'.

<p>APPEARANCE</p>  <p>35% ~2.8 million</p>	<ul style="list-style-type: none"> • This group generally falls into the 24 – 44 age group, slightly more predominantly male. • On average they go to the gym about 3 – 4 times per week. • They also take part in activities like boot camp, circuits, body combat, walking, running and cycling. • 18% regularly use a rowing machine.
<p>HEALTH</p>  <p>30% ~2.4 million</p>	<ul style="list-style-type: none"> • This group is generally over 35 years old and more likely female. • On average they go to the gym about 3 – 4 times per week. • They also take part in activities such as yoga, swimming, netball, walking, dance/aerobics and running. • 43% of those surveyed use the rowing machine.
<p>PERFORMANCE</p>  <p>15% ~1.2 million</p>	<ul style="list-style-type: none"> • This group is generally under 34 years old and is predominantly male. • On average they go to the gym 5 days or more per week. • They also take part in sports like triathlon, football, running, swimming and cycling. • 67% of this group use the rowing machine.

 <p>MEDICAL</p> <p>15%</p> <p>~1.2 million</p>	<ul style="list-style-type: none"> • This group is generally over 35 years old and predominantly male. • On average they go to the gym about 3 – 4 times per week. • They also take part in activities like walking, swimming, cycling and golf. • 36% of this group use the rowing machine.
 <p>ENJOYMENT</p> <p>5%</p> <p>~0.4 million</p>	<ul style="list-style-type: none"> • This group is generally under the age of 35 with a fairly equal split between male and female. • On average they go to the gym twice (or less) per week. • They also take part in activities like Zumba and football. • None of this group use the rowing machine.

Hardcore Indoor Rowers

The hardcore Indoor Rowers are the group of people who primarily choose indoor rowing as their sport of choice. They often belong to Indoor Rowing Clubs but also take part in gyms. This group is very competition-focused.

Based on analysis from the 2015 British Rowing Indoor Championships, we can make the following conclusions about this group:

- Hard-core Rowers who are Indoor Rowing Club members are predominantly men over 25 years old.
- Hard-core Rowers who are gym members are also predominantly men over 29 years of age.
- We do not have any evidence around how often they train or take part in competition.

CrossFitters

CrossFit is a fitness regime consisting of “constantly varied, high-intensity, functional movement.” (Glassman, 2007). It has become a global phenomenon since its inception in the United States in 2000. It’s difficult to pin down the profile of CrossFitters, but there are suggestions that “men like the competition, women like the weight reduction, and everyone likes the camaraderie.” (Greeley, 2014).

The basic principle is that there is a Workout of the Day outlining 3 different exercises and how many rounds of each are required. Exercises can include (but are not limited to) running, power cleans, push ups, squats and indoor rowing.

School Gamers

“The Sainsbury's School Games is a unique opportunity to motivate and inspire millions of young people across the country to take part in more competitive school sport.” (“About the Games”, 2013). The programme is sponsored by Sainsbury and delivered through partnerships with The Department for Culture, Media and Sport, Sport England and Youth Sport Trust for school children between the ages of 11 and 18.

A variety of sports are delivered, indoor rowing being one of them. In 2012 indoor rowing ranked 10th out of 36 sports within the School Games programme at Level 3. Indoor rowing Level 3 events are currently running in 32 County Sports Partnership areas. In the current year (although there are still five events to run for 2014/2015) the split between male and female participation was 50%. The trend indicates that event sizes are growing and more secondary schools are engaging with the programme each year.

Functional Fitness

There are a number of indoor rowing participants who use the rower as a means to gain functional fitness for another activity. This may be for participation in other sports or another job role. The military and emergency services are both known to have strong indoor rowing activity.