

STATE OF GOLF IN THE UK

IS IT AS BAD AS PEOPLE ARE SAYING?

WHAT ARE YOU DOING ABOUT IT?



November 16, 2015

SPORTS MARKETING SURVEYS INC. – What we do...

INVESTIGATION

INSIGHT

ACTION



PARTICIPATION

SPORTS EQUIPMENT

VENUE RESEARCH

- Official Suppliers of the European Tour Equipment Census
- Consumer Surveys – Product Testing, Brand Awareness, Brand Image
- Customer Satisfaction
- UK & European Retail Audits for speciality golf channels
- Market Sizes and Trends – Rounds Played
- Sports Participation numbers

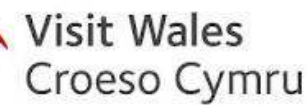
WHO WE WORK WITH...

GOLF



WHO WE WORK WITH...

FEDERATIONS & EVENTS



STATE OF GOLF IN THE UK

A large, dimly lit golf ball is positioned in the center-right of the slide, resting on a patch of grass. The background is dark and textured, suggesting a golf course at night or in low light.

ROUNDS PLAYED YEAR TO DATE – NATIONAL

Average number of Rounds Played per course
in each month

— 2012 — 2014 — 2015



Golfers 19% decline since peak of 2006

2014 Over 1.5M Core Golfers – and avid numbers increased by 50,000

Golf Club membership in England down 22% in last 10 years

NOT COST – it is TIME and OTHER COMMITMENTS that stop people playing



FUN – FAMILY – FAST – FLEXIBLE

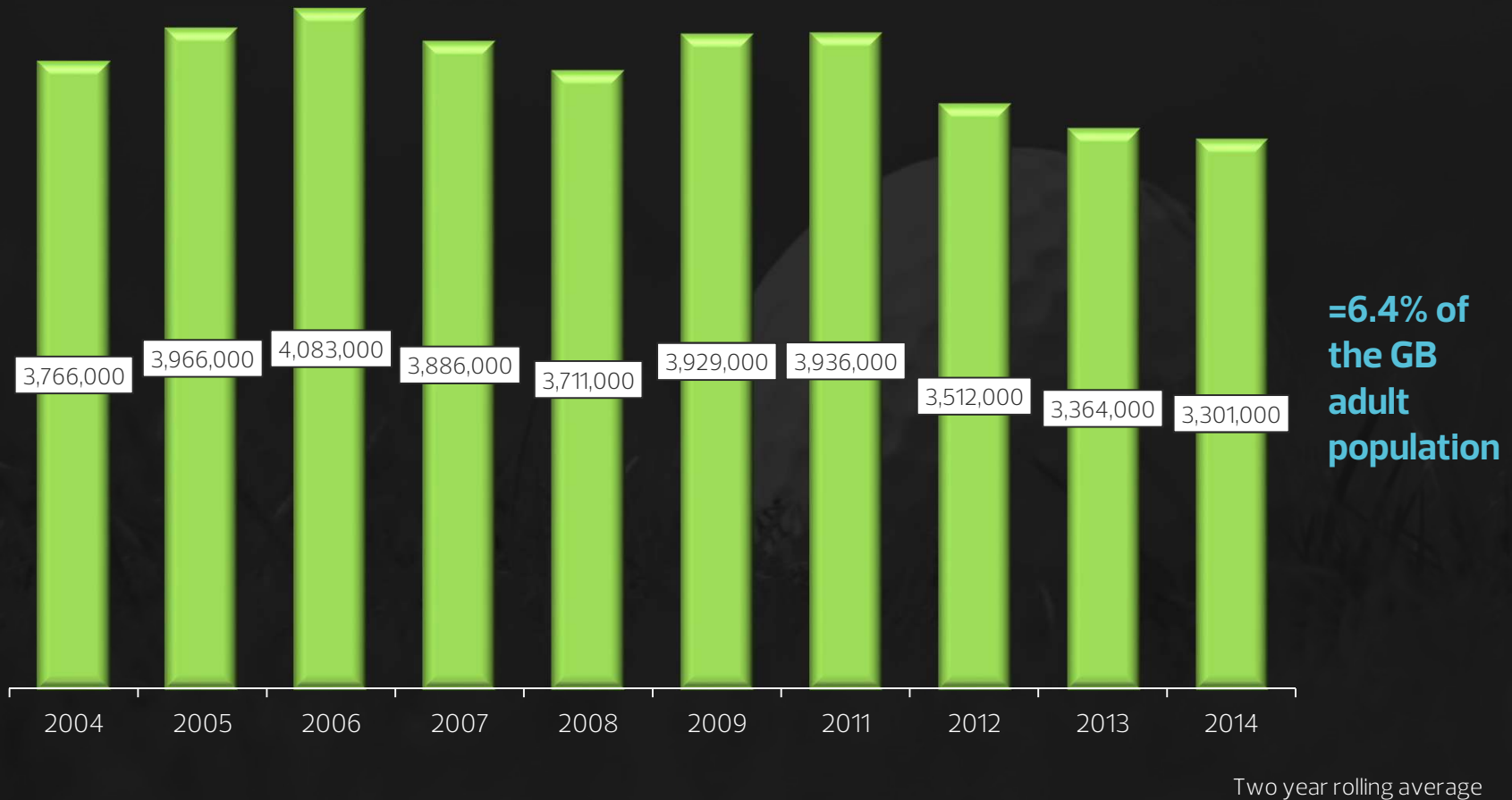
Females = 15% of England golf club members – but only 12% of golfers

Golf Club members play 5.4 times as many rounds as non-members

NUMBERS STABILISING at 3.3M (2014)

2014 PARTICIPATION: GB FULL LENGTH COURSE USERS

Adults who have played on a full length golf course (9 or 18 hole) at least once in the last 12 months.

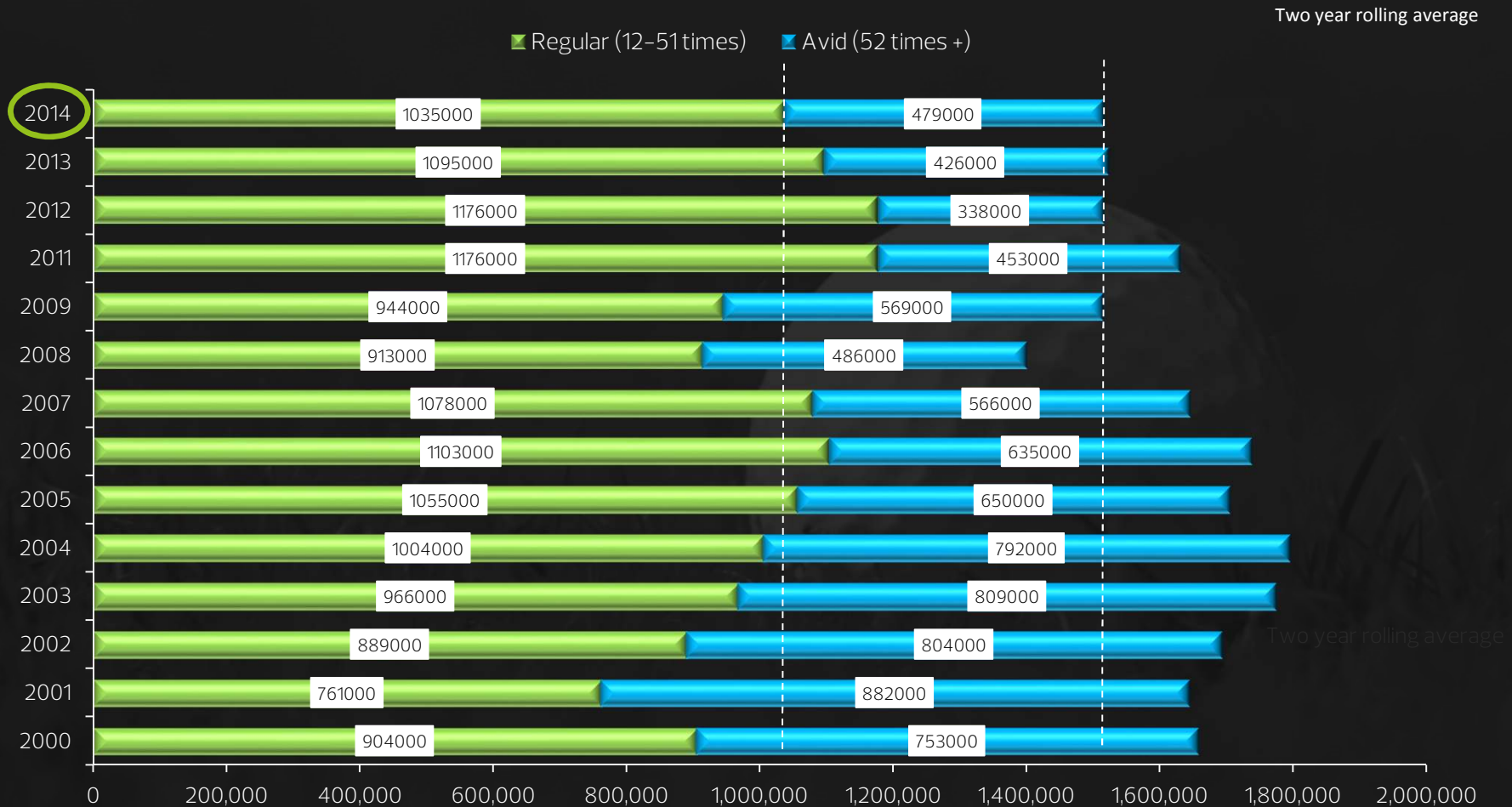


THE IMPORTANCE OF THE CORE GOLFER



GB : 'CORE' GOLFERS

Adults who have played on a full length golf course (9 or 18 hole) at least once in the last 12 months.



2013 = 1,521,000 = 45% of full course users

2014 = 1,514,000 = 46% of full course users

46%



80%+



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GOLF CLUB MEMBERSHIP IN ENGLAND



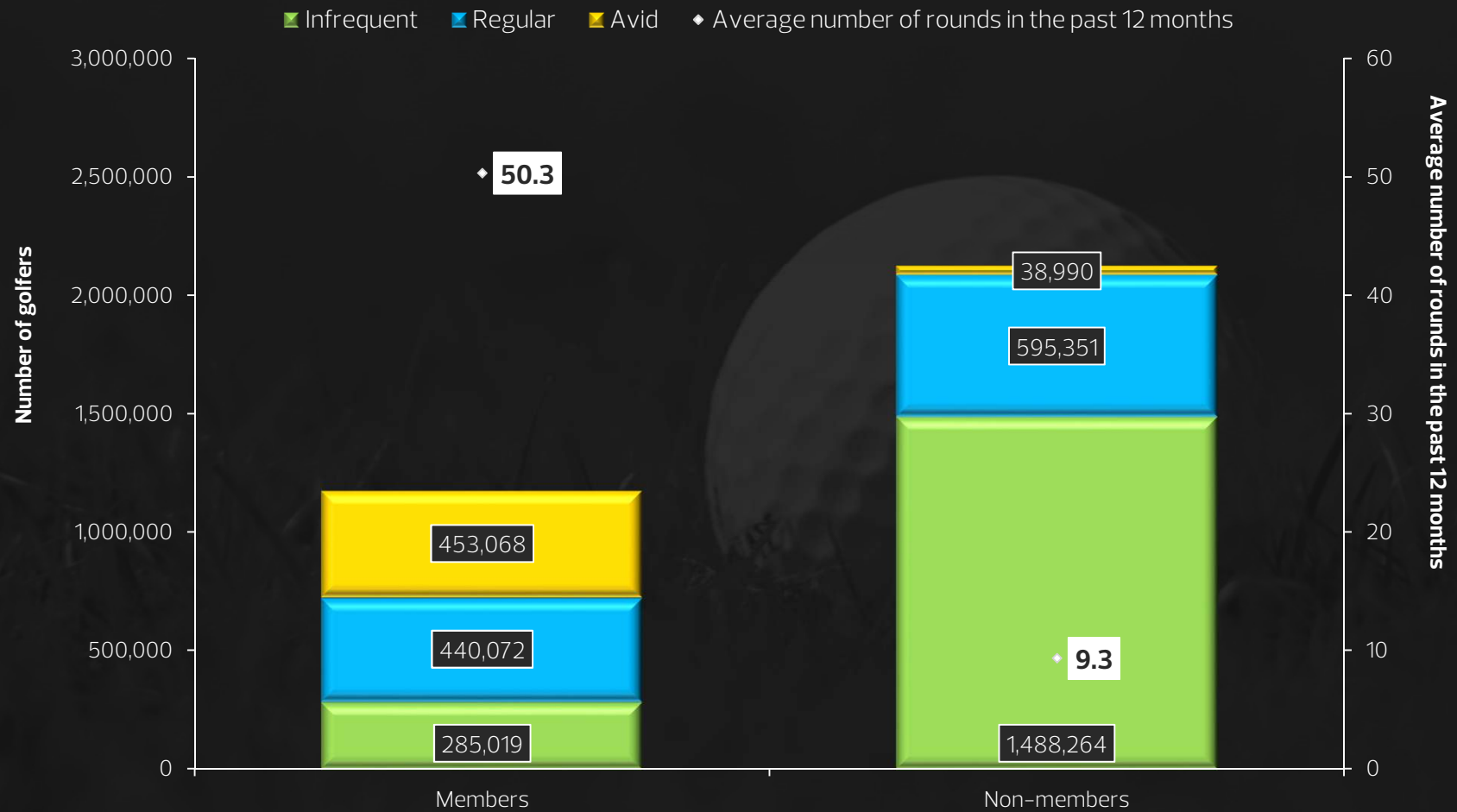
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GOLF MEMBERSHIP – IN ENGLAND (REGISTERED GOLFERS)



GOLF CLUB MEMBERSHIP

Golfers only





WHAT ARE THE ISSUES?

GOLF ACTIVITY | How many people?

3.5m FULL LENGTH COURSE
ADULTS
+0.2m 6-17y.o.

2.8m DRIVING RANGE
ADULTS
+0.3m 6-17y.o.

2.0m 9 HOLE COURSE
ADULTS
+0.2m 6-17y.o.

2.0m ADVENTURE GOLF
ADULTS
+0.7m 6-17y.o.

2.0m ADULTS

1.9m PITCH & PUTT
ADULTS
+0.4m 6-17y.o.

1.9m ADULTS

1.7m COMPUTER GAMING GOLF
ADULTS
+0.2m 6-17y.o.

1.7m ADULTS

1.5m PUTTING GREEN
ADULTS
+0.2m 6-17y.o.

1.5m ADULTS

1.0m ADULTS

0.3m GOLF SIMULATOR
ADULTS
+0.1m 6-17y.o.

0.2m SCHOOL
ADULTS
+0.2m 6-17y.o.

0.1m ANY OTHER
ADULTS
+40k 6-17y.o.

9.3m ADULTS

HAVE SOME INVOLVEMENT IN AT LEAST ONE OF THESE FORMS OF GOLF

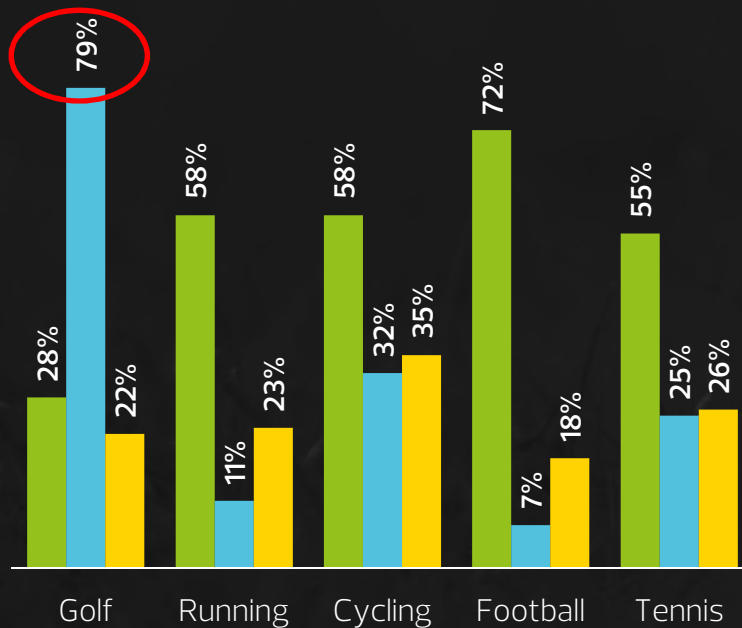
+1.7m 6-17 year olds

This graphic shows the absolute number of people who have taken part in each of the categories of golf in the past year, including the broader definition of golf activity

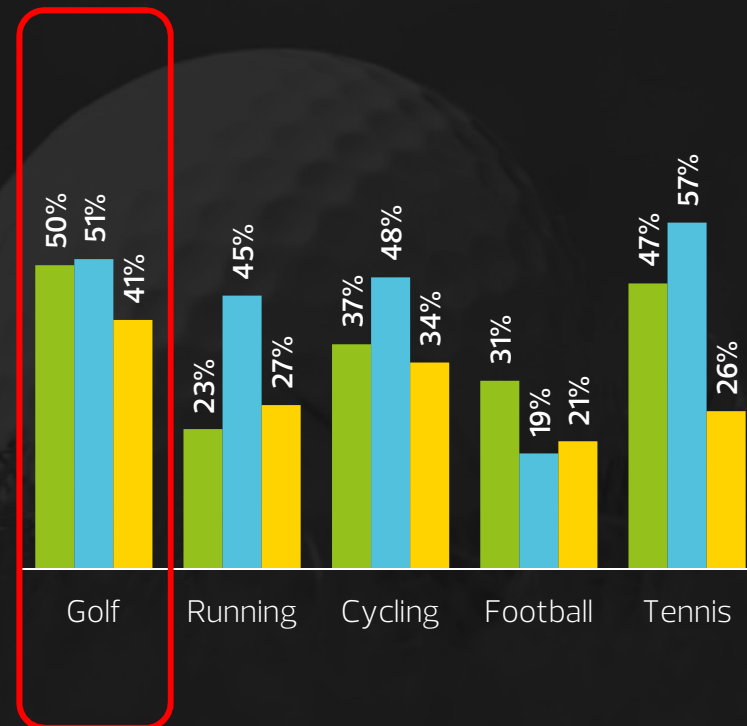
- Extrapolations based on population with household internet access:
 - 43.1m 18-80 year olds
 - 7.8m 6-17 year olds

SPORTS PERCEPTIONS

- is a good sport for younger people
- is a good sport for older people
- is a sport for people like me

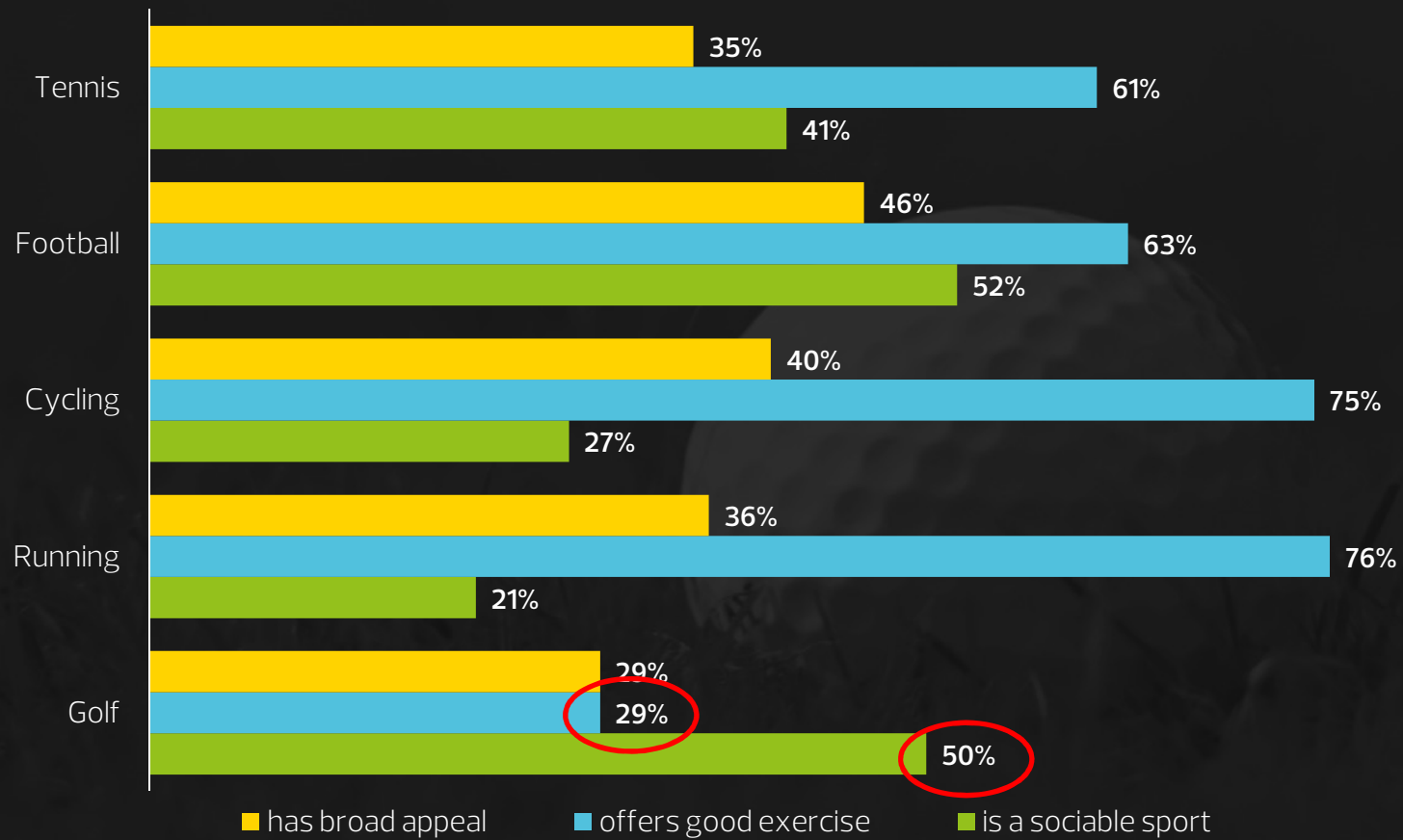


- is a good sport for people of different ages to play together
- is a good sport for men and women to do together
- is a good sport for people of varying ability to do together



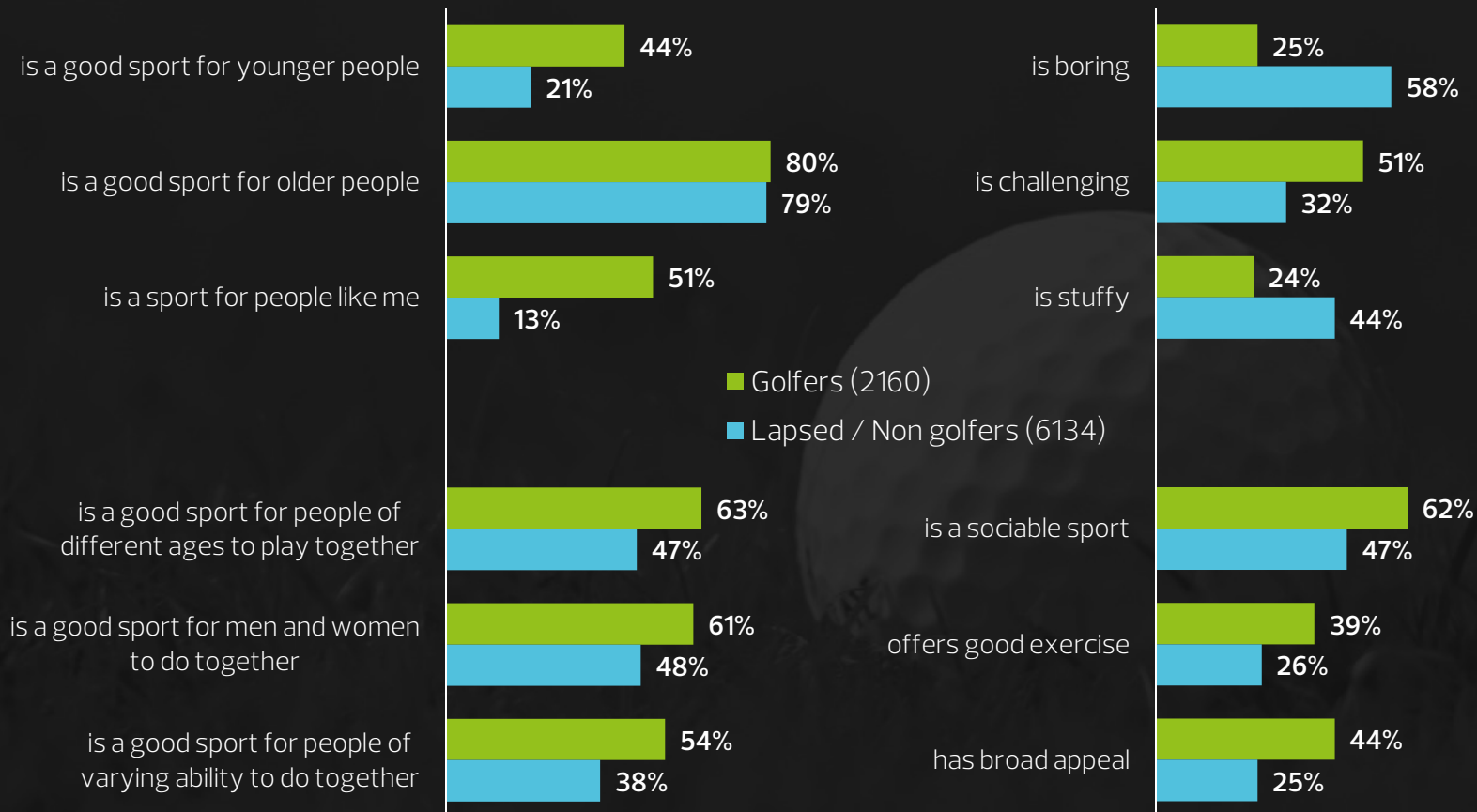
Base: 10050

SPORTS PERCEPTIONS



Base: 10050

GOLF PERCEPTIONS



Base: 10050

THE NUMBERS – NOT ALL BAD

Have you considered 'simulator experience evenings'?

What about "Putting & Pimms"?

What can you do at your venue?

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FEMALES & FAMILIES



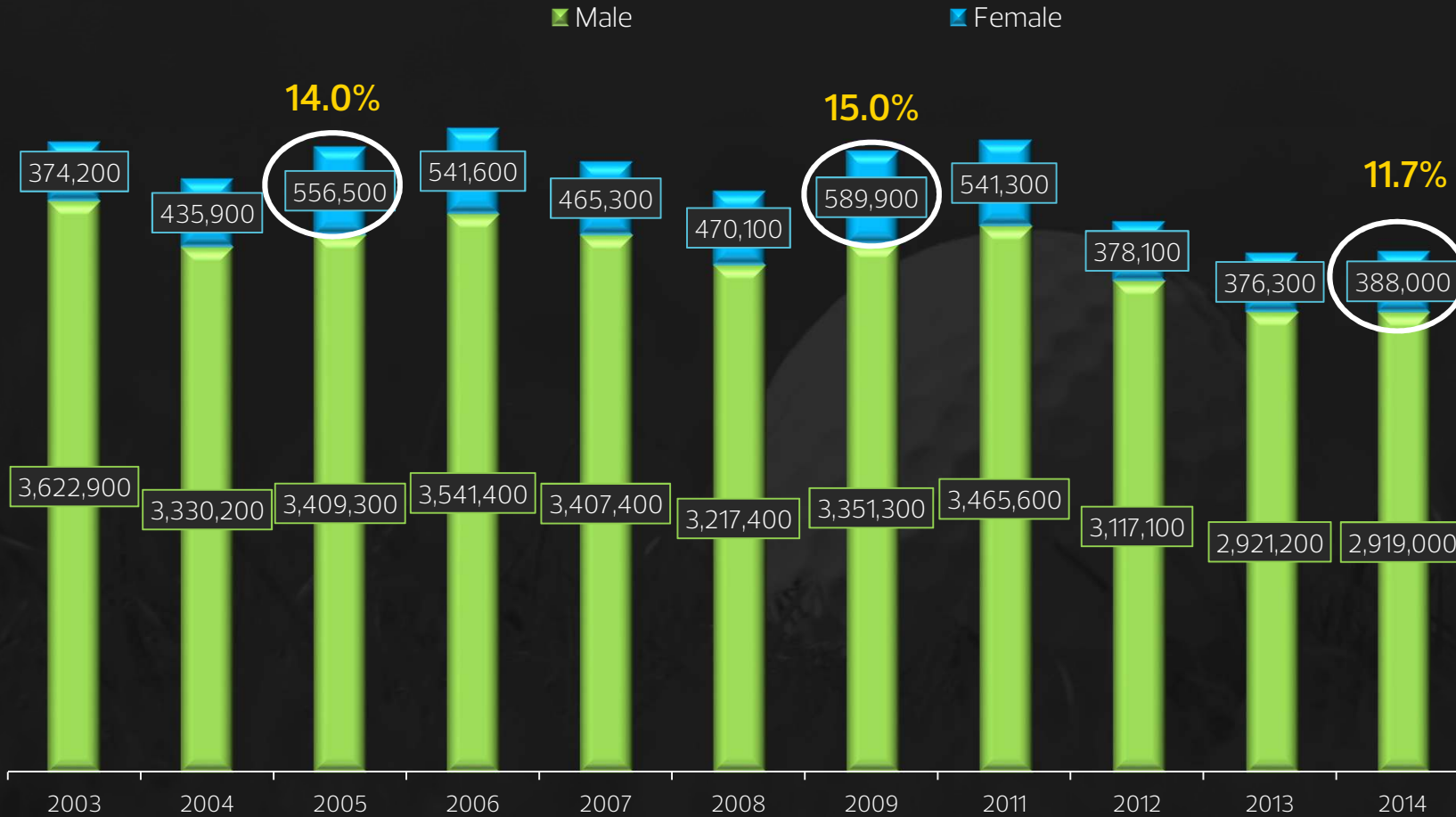
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THE FEMALE GOLF OPPORTUNITY



GB – GENDER OF GOLFERS

Adults who have played on a full length golf course (9 or 18 hole) at least once in the last 12 months.



INTEGRATION & OPPORTUNITY



11.7%

EGA - REGISTERED



37.6%



33.3%



28.9%



28.1%



15.1%

49% took up game because
a husband or partner played

27% feel they are treated
poorly by male golfers

78% of male golfers who have a wife or partner say their
companion does not play

51% of male golfers who have sons say that this son plays
golf – but only 12% who have a daughter says this daughter plays

SMS INC. Women & Golf 2015

GOLF IN SWEDEN



Svenska
Golfförbundet

 My Golf

 Search

Vision 50/50

A long-term change process to enhance the sport's appeal of groups we do not attract today.

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PACE OF PLAY



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ISSUES?



COMPETING FOR THE LEISURE £'



LEISURE FRAGMENTATION

Golf is competing for our time...

► Changing consumption patterns

- More leisure choice everywhere
- More sports to play
- Increasingly specialist pursuits
- More choice of tourism destinations (low cost airlines)
- Internet (social networking / e-commerce)
- Computer gaming
- Gardening / DIY / cinema / “eating out”



FACT NOT OPINION

- Amongst golfers who said they played less in 2014 than they had in 2013, other than illness and injury, **WORK and FAMILY COMMITMENTS** were the 2 MAIN factors cited as the cause.
 - **DOUBLE** the amount that said because of the weather
- 60% of lapsed golfers stated that **OTHER COMMITMENTS** was influential or VERY influential in their reason for stopping golf
- R&A Global Pace of Play Survey
 - TWO main reasons (GLOBALLY) for not playing as much as wanted – **WORK & FAMILY COMMITMENTS**
 - 60% said **THAT PLAYING IN LESS TIME** would **IMPROVE THEIR ENJOYMENT** of the game.





**FASTER GOLF
HOW?**



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GOLF IS NOT BROKEN



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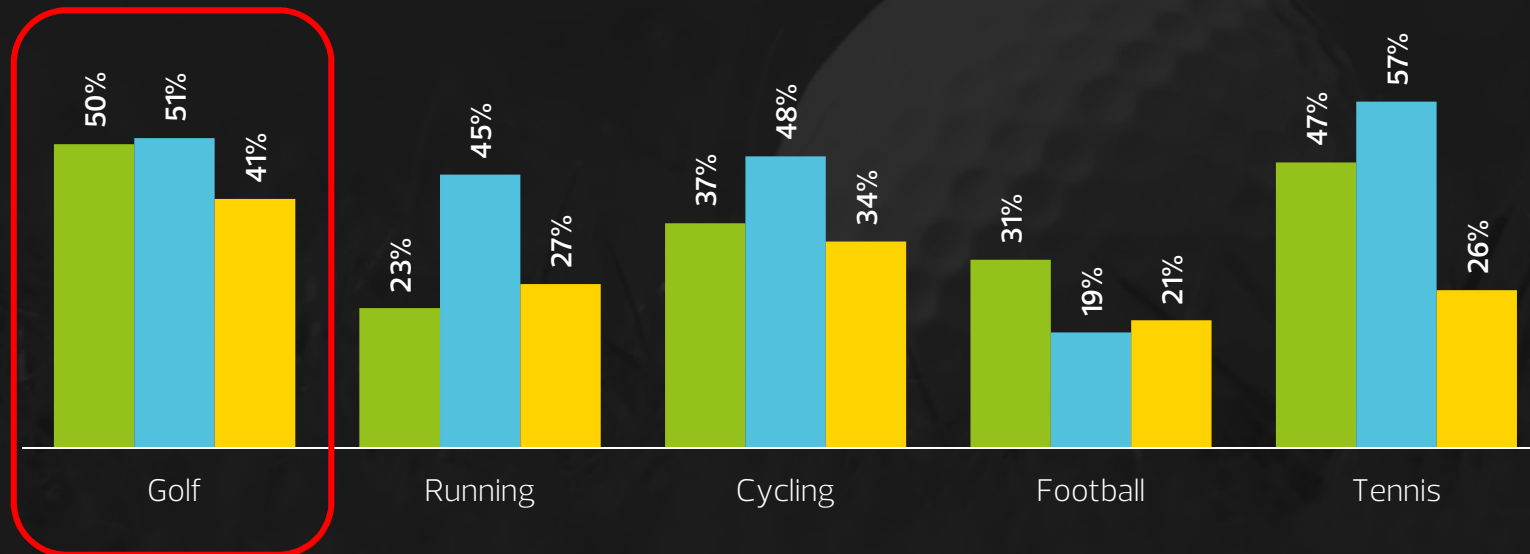
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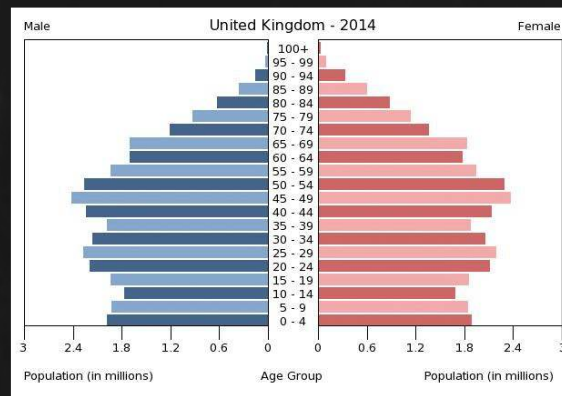
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Base: 10050

ADDRESSING THE BIG ISSUES.....



THE AGEING POPULATION – GOLF OPPORTUNITY

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WE DO APPEAL TO THE YOUNGER GENERATION





WHO ARE YOUR AMBASSADORS?



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THE FUTURE – A POSITIVE PICTURE.....



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**FUN
FAMILY
FAST
FLEXIBLE**



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