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...

PARTICIPATION

• 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

SPORTS EQUIPMENT

VENUE RESEARCH
WHO WE WORK WITH...

GOLF

- Callaway
- TaylorMade
- Titleist
- FootJoy
- Mizuno
- PING
- Srixon
- Cleveland Golf
- ECCO
- Bridgestone Golf
- Galvin Green
- Cobra Puma Golf
- Golf Pride Grips
- PING Collection
- Nike Golf
- Adams Golf
- Motocaddy
- Adidas
- GolfBuddy
- Powakaddy
- W&S
- American Golf
WHO WE WORK WITH...

FEDERATIONS & EVENTS
STATE OF GOLF IN THE UK
ROUNDs PLAYED YEAR TO DATE – NATIONAL

Average number of Rounds Played per course in each month

2012
2014
2015

YTD +1%
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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.

Two year rolling average = 6.4% of the GB adult population

<table>
<thead>
<tr>
<th>Year</th>
<th>Participation</th>
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<tbody>
<tr>
<td>2004</td>
<td>3,766,000</td>
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<tr>
<td>2005</td>
<td>3,966,000</td>
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<td>2013</td>
<td>3,364,000</td>
</tr>
<tr>
<td>2014</td>
<td>3,301,000</td>
</tr>
</tbody>
</table>
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.

Two year rolling average

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

2014 = 1,514,000 = 46% of full course users
GOLF MEMBERSHIP – IN ENGLAND (REGISTERED GOLFERS)

2000: 868,966
2001: 869,943
2002: 877,682
2003: 877,355
2004: 878,821
2005: 871,578
2006: 874,397
2007: 872,665
2008: 840,887
2009: 833,110
2010: 805,206
2011: 776,676
2012: 761,335
2013: 750,004
2014: 712,390
2015: 678,372

Total decrease: 22%
WHAT ARE THE ISSUES?
GOLF ACTIVITY | How many people?

- FULL LENGTH COURSE: 3.5m ADULTS
  - +0.2m 6-17 y.o.
- DRIVING RANGE: 2.8m ADULTS
  - +0.3m 6-17 y.o.
- 9 HOLE COURSE: 2.0m ADULTS
  - +0.2m 6-17 y.o.
- ADVENTURE GOLF: 2.0m ADULTS
  - +0.7m 6-17 y.o.
- PITCH & PUTT: 1.9m ADULTS
  - +0.4m 6-17 y.o.
- COMPUTER GAMES GOLF: 1.7m ADULTS
  - +0.2m 6-17 y.o.
- PUTTING GREEN: 1.5m ADULTS
  - +0.2m 6-17 y.o.
- PAR 3 / SHORT COURSE: 1.0m ADULTS
  - +0.2m 6-17 y.o.
- GOLF SIMULATOR: 0.3m ADULTS
  - +0.1m 6-17 y.o.
- ANY OTHER INVOLVEMENT: 0.1m ADULTS
  - +40k 6-17 y.o.
- SCHOOL: 0.2m ADULTS
  - +0.2m 6-17 y.o.

Total: 9.3m ADULTS

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

+1.7m 6-17 year olds

To offset sample bias, involvement is counted if participation frequency is more than twice in the last year.

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

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SPORTS PERCEPTIONS

- **Tennis**: 35% has broad appeal, 41% offers good exercise, 61% is a sociable sport
- **Football**: 46% has broad appeal, 52% offers good exercise, 63% is a sociable sport
- **Cycling**: 40% has broad appeal, 27% offers good exercise, 75% is a sociable sport
- **Running**: 36% has broad appeal, 21% offers good exercise, 76% is a sociable sport
- **Golf**: 29% has broad appeal, 29% offers good exercise, 50% is a sociable sport

Base: 10050

November 16, 2015
GOLF PERCEPTIONS

- Is a good sport for younger people: 44% (Golfers), 21% (Lapsed/Non-golfers)
- Is a good sport for older people: 80% (Golfers), 79% (Lapsed/Non-golfers)
- Is a sport for people like me: 51% (Golfers), 13% (Lapsed/Non-golfers)
- Is a good sport for people of different ages to play together: 63% (Golfers), 47% (Lapsed/Non-golfers)
- Is a good sport for men and women to do together: 61% (Golfers), 48% (Lapsed/Non-golfers)
- Is a good sport for people of varying ability to do together: 54% (Golfers), 38% (Lapsed/Non-golfers)
- Is boring: 25% (Golfers), 58% (Lapsed/Non-golfers)
- Is challenging: 80% (Golfers), 79% (Lapsed/Non-golfers)
- Is stuffy: 24% (Golfers), 44% (Lapsed/Non-golfers)
- Is a sociable sport: 62% (Golfers), 47% (Lapsed/Non-golfers)
- Offers good exercise: 39% (Golfers), 26% (Lapsed/Non-golfers)
- Has broad appeal: 44% (Golfers), 25% (Lapsed/Non-golfers)

Base: 10050
THE NUMBERS – NOT ALL BAD

Have you considered ‘simulator experience evenings’?
What about “Putting & Pimms”?

What can you do at your venue?
THE FEMALE GOLF OPPORTUNITY

#THISGIRLGOLFS
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.

Male
Female


11.7%
14.0%
15.0%
INTEGRATION & OPPORTUNITY

EGA - REGISTERED

- Germany: 37.6%
- Netherlands: 33.3%
- Sweden: 28.9%
- France: 28.1%
- England: 15.1%

49% took up game because a husband or partner played golf.

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

27% feel they are treated poorly by male golfers.

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

Vision 50/50

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

838.8 miles
how long is the
world's longest golf course?
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?

Tips for playing FASTER
GOLF IS **NOT** BROKEN
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.

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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?
THE FUTURE – A POSITIVE PICTURE......
OUR MISSION
TO LOVE, SERVE & DELIVER FUN FOR ALL
PLAY OFTEN... LAUGH MORE

FUN
FAMILY
FAST
FLEXIBLE
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