

Surveys and Statistics - what do they mean?

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Surveys and Statistics

- To Survey –
 - Review, Examine, Look at, Measure
- A Statistic –
 - Data, Value, Information, Gauge

All useful in Golf Club Management!

Surveys and Statistics

- Demographics within GCMA ETQ
- Environment and Climate
- Golf's Economic Impact on Europe
- Global Overview re Club Membership
 - Case studies from New Zealand & USA
- Should we make changes to The Game?

Demographics within GCMA ETQ

Delegates at Hinckley 2009

GCMA Members in Attendance = 172

**74 (43%) are Graduates of the
'Introduction to Golf Club Management'
GCMA Residential Training Courses**

**Thank you for your CONTINUED support
of the Association's Educational
and Training activities!**

Demographic Profile of Attendees at Hinckley 2009 (Delegates)

- Under 40 – 12 = 7%
 - 41 to 50 – 45 = 26%
 - 51 to 60 – 72 = 42%
 - Over 60 – 43 = 25%
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- Average Age of Delegates this week = 53

Demographic Profile of Training Course Attendees, 2004-2008

U 40		41 to 50		51 to 60		Over 60		
8	10.8%	26	35.1%	28	37.8%	12	16.2%	2004
16	20.0%	31	38.8%	28	35.0%	5	6.3%	2005
11	14.9%	23	31.1%	37	50.0%	3	4.1%	2006
12	26.7%	16	35.6%	15	33.3%	2	4.4%	2007
12	20.3%	28	47.5%	18	30.5%	1	1.7%	2008
59	17.8%	124	37.3%	126	38.0%	23	6.9%	

So what Does this tell us?

- Younger People continually coming into Golf Club Management
- Healthy Range of both Youth and Experience that *want* to "Continue to Learn"
- Look at ways of financially assisting younger Members?

Environment & Climate

Environment and Climate

Research, looking back 233 years, has found that since 1980 the length of the growing season has been significantly changing

- The earliest start of the thermal growing season was in 2002 when it began on 13 January
- The longest growing season in the 233-year series was 330 days, in 2000
- The shortest growing season was 181 days in 1782
- The 2006 growing season was 269 days, well above the 1961–1991 average of 252 days.

Should we be worried about this?

Source of information –

<http://www.metoffice.gov.uk/climatechange/guide/effects/seasons>

So what does this tell us?

- Growing/Playing season will increase
- May have negative affects on practical playability of golf courses
- It will increase demand and expectations of high standards of presentation

Golf's Economic Impact on Europe

Golf in Europe

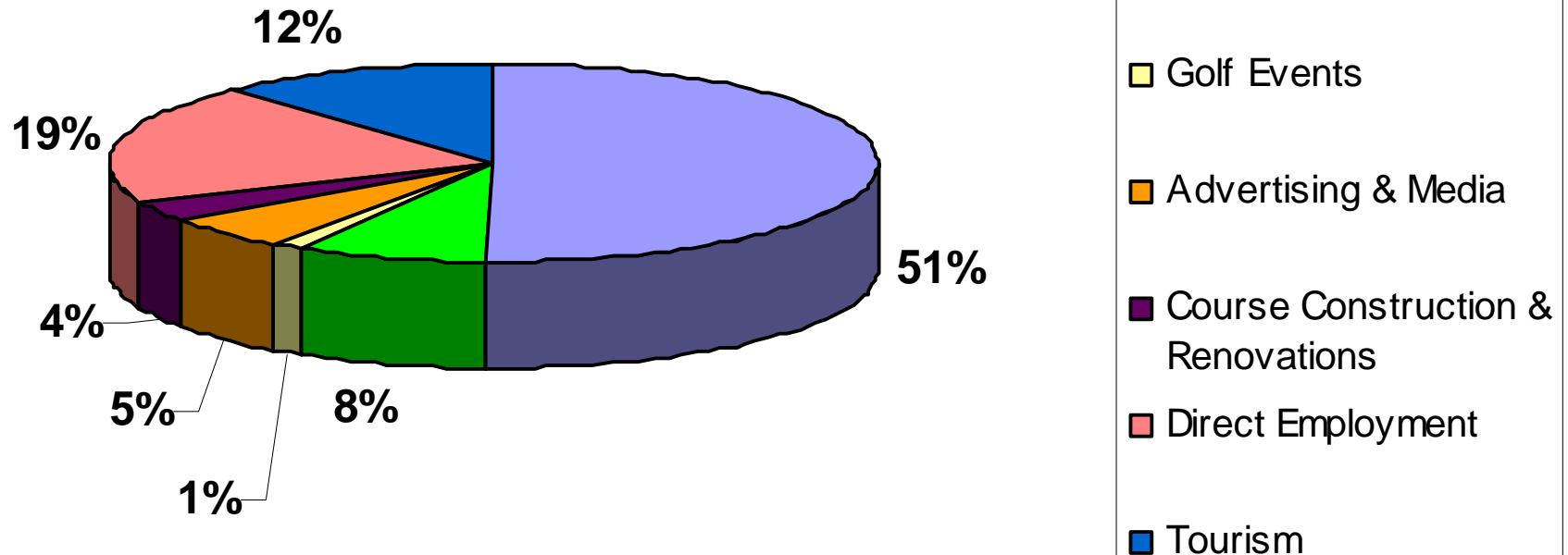
- Golf directly contributes an estimated €15.4¹ billion to the European economy
- This region of the world comprises more than 6,300¹ golf courses with Great Britain and Ireland accounting for nearly 50%² of the supply
- With an estimated 4.1¹ million registered golfers, the golf economy has a value of €3,757 per golfer. In U.S. dollars, this equates to \$4,856 per golfer

¹ Sports Marketing Surveys – Economic Contribution of Golf to the European Economy, December 2006

² KPMG Advisory Ltd. – Golf Benchmark Survey 2006

Golf Economy Contributors

Existing golf facilities account for 51% or €7.75 billion of the total golf economy in Europe



Roughly €3 billion of the economy is attributed to the employment of 120,000 full time jobs

The Golf Club Scene in Europe

Growth rates of New Golf Clubs vary:

Stagnation in GB & I

- possible negative net position in 2010?

Scandinavia slowing down

- Most Swedish Clubs no longer have waiting lists

Eastern European developing

- but from a very small base number

Global Overview on Golf Club Membership

Falling Club Membership?

You are not alone!

All 4 Home Unions record further falls in Club Membership numbers for 2009

- EGU anticipates a fall of 20,000 (3%)
- EWGA down 4,000 (3.7%)
- SGU down 2.6% Male, 4.0% Female
- IGU down over 7% Male, 4% Female
- GUW down 6% in 2009 (7.8% 03/08)

New Zealand Golf Association

Largest participation sport in Country
400 Clubs, 130,000 Club members
70% Male, poor Junior numbers overall
370,000 'casual' golfers – nomads
Club Members' average age is 60
Large (Club) losses 20 to 45 group
Still play, but not as Club Members
Many re-join at 60!

New Zealand Golf Association

Conducted major research in 08

- Focus Groups determined Golf Clubs not always 'warm friendly places' (!)
- 2000 casual golfers (nomads)
 - revealed 23% HAD been Club Members
 - 53% between 25 and 44
 - Average of 8 games a year

New Zealand Golf Association

Why Don't they join a Club?

- Time is precious (obvious)
- Cost commitment (ditto)

But:

- 86% said 'wanted variety of courses'
- 67% said likely to join if 'flexible'
- 65% of Ladies 'would join if friend did'
- 74% more likely if coaching included
(connected to game is too difficult)

New Zealand Golf Association

Solutions and suggestions made –

1. Clubs to look at 'buddy' deals
2. Include coaching
3. Phase in 'starter' tees (less difficult)
4. Allow payment flexibility (DDR etc)
5. Offer Member benefits & values
6. Offer flexibility schemes
7. Bring in family memberships & facilities
8. Orientation programmes
9. Incentivise Pro Shop on Membership Recruitment

New Zealand Golf Association

Results –

Have reversed negative trend in 09

Join with a friend been very successful

Flexible schemes increasing

Golfers chose the Clubs, not as used to be
Clubs chose the Golfers

Source – golfclubhub.co.nz

Golf Club Membership in USA

Many similarities to NZ and GB & I:

Approximate fall of 5% last five years

Shift from Regular to Occasional

Golfers doing the maths

More diversity in life

More going on

More choices/competition

Attitudes of some existing members drives away new ones!

Golf Club Membership in USA

- Currently 16,000 Courses/Facilities
- Took 100 years to build first 12,000
- In 1960 Private = Public/Pay & Play
- 4,000 built in 1990's mostly public/ P & P
- Now, only 25% approx are Member/Private
- Only 10% of golfers are at Private Member Clubs
- Rounds per year dropped by 20% from 40,000 to 33,000 last 20 years
- Up to 10% of Clubs/facilities currently in 'significant financial peril'
- Oversupply: more closing than opening

Golf Club Membership in USA

The future?

Latent demand exists – still people interested in playing and joining Clubs

Good time to be a golfer!

- Plenty of choice
- Cost of playing falling
- Joining fees waived in most facilities

Needs to be a natural adjustment to Oversupply

Watch this space!!!

Should we make Changes
to The Game

Survey of GCMA Members

What one thing would you change in Golf?"

- 22% Felt changes should be made to
 - Etiquette, Image (stuffiness), reduce elitism, remove outdated restrictions
- 20% Felt Clubs themselves needed to change:
 - Members' attitudes, Committee structures, Management Structures, and relax dress codes
- 19% Felt the 'Authorities" should effect changes to combat:
 - Slow play, flight of ball/distances/restrict design etc, simplify the Rules and/or the CONGU handicap system
- 17% Felt changes should be made to;
 - Abolish cheap golf schemes
 - Encourage more teenagers into the game
 - Encourage more 'nomads' to join Clubs

Survey of GCMA Members

Slow play seemed to concern most

- 65% of returns stating this had become an issue at their Clubs
- 40% Blamed the TV and/or Pro Golfers
- 43% Blamed existing golfers
 - 24% = Club Members
 - 19% = Visitors
- 6% Felt New players needed better education/induction
- ** Less than 4% felt the 'Authorities' were to blame (i.e. R&A, NGB's)

Surveys and Statistics - Conclusion

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