

The 'liberalization' of the  
Golf market in Holland,  
from 'club members only'  
to 'golf for anybody'

*due to general social changes  
and financial/commercial interests*

# Three kinds of golfers in Holland



Free registered golfer  
150.000



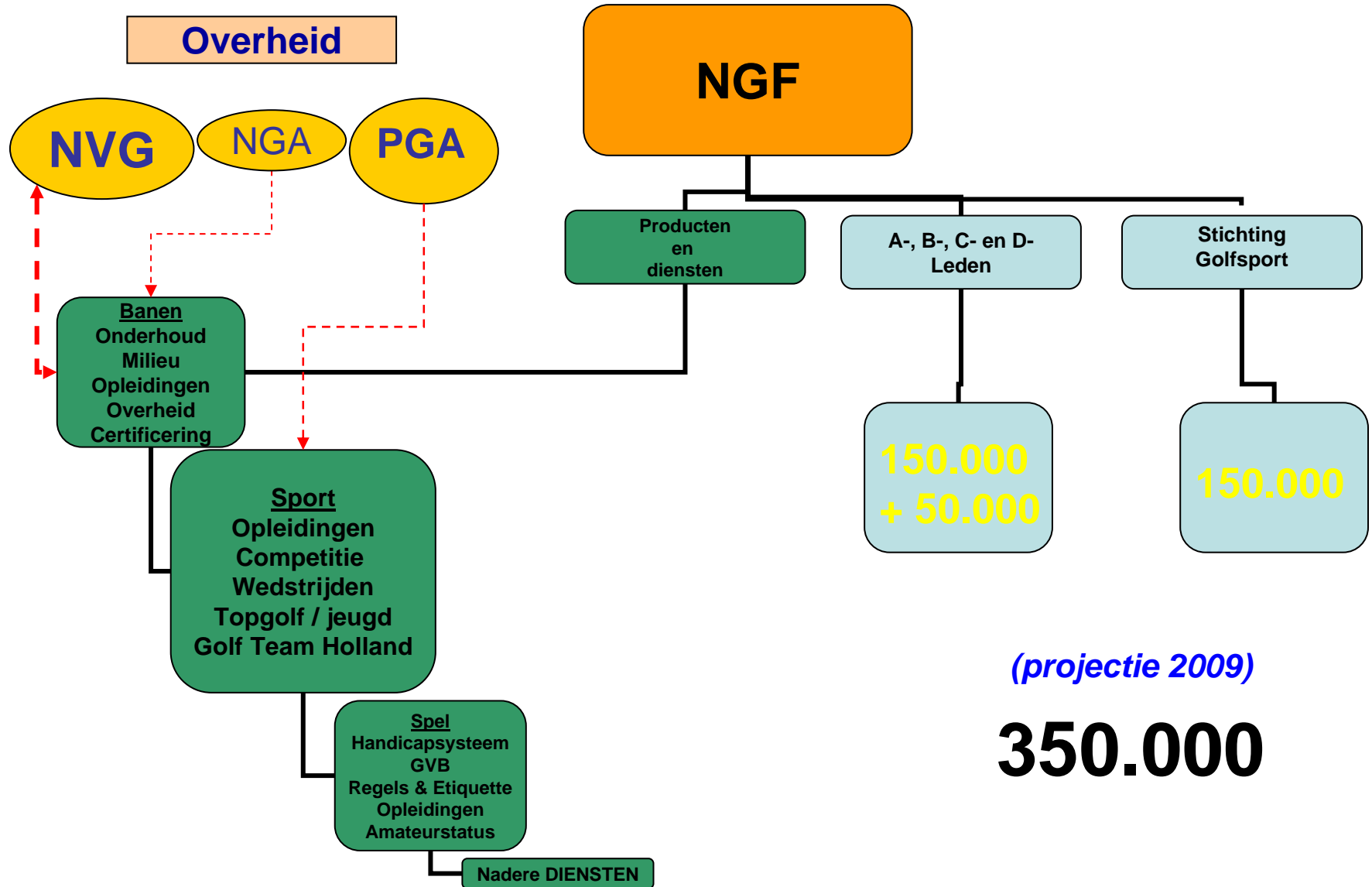
Club Member  
150.000



Virtual club member  
50.000



***Missie: het stimuleren, begeleiden en ondersteunen van de golfsport, het golfspel en de golfer in Nederland***



# The Membership period

1894 – 1980

- **Membership golf**

- elite
- relatively cheap
- perceived as not excessible
- exclusive
- 30.000 happy few in a perfect world

- **Federation & clubs**

# The Commercial and social push to growth

From 1980

- New courses
  - commercial
  - public
- New golfers
  - can they behave (rules & etiquette)?
  - what are their wishes?

# The Golf License

## Step 1. **Golf License Card:**

- Protect
- Educate
- Test
  - theoretical examination on rules & etiquette
  - practical: 3 out 4 holes max + 10.
  - Federation card € 11,- / year
- No (club)membership needed!
- Became **marketing tool**

# The Golf License with EGA hcp.

## Step 2. **Handicap & equal**

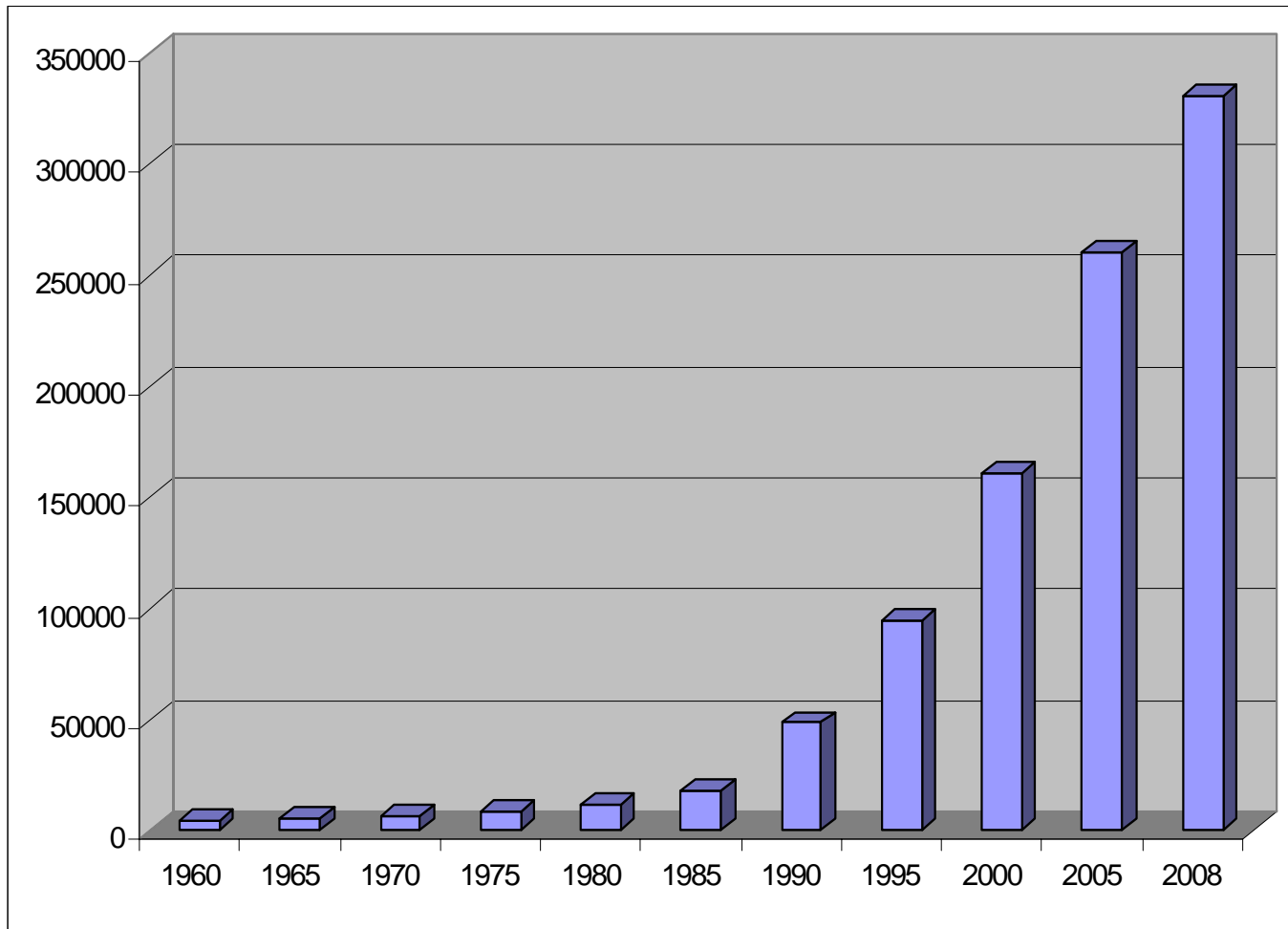
- Discussion: competition
- Via club or Federation
- All golfers one kind of a card

# The Golf License

## Step 3. **D-members (virtual golf clubs)**

- No (fixed) golfcourse
- Company, foundation, club
- Membership from € 30 / year  
(€ 16 to Federation)
- Automobile club (FDM in DK), etc.

# # golfers keeps growing in Holland (20.000 / year)



# Three kinds of golfers in Holland



Free registered golfer

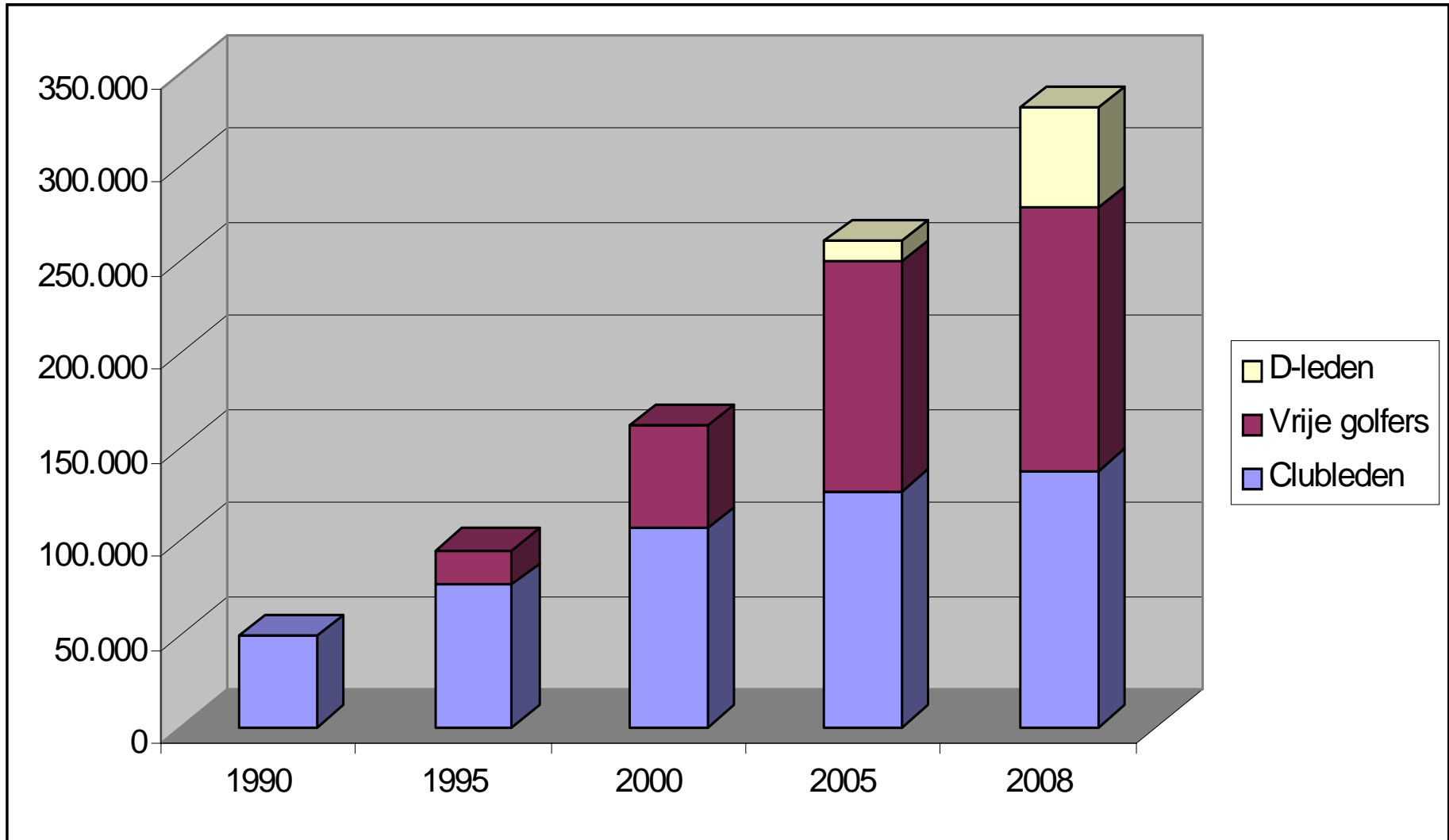


Club Member



Virtual club member

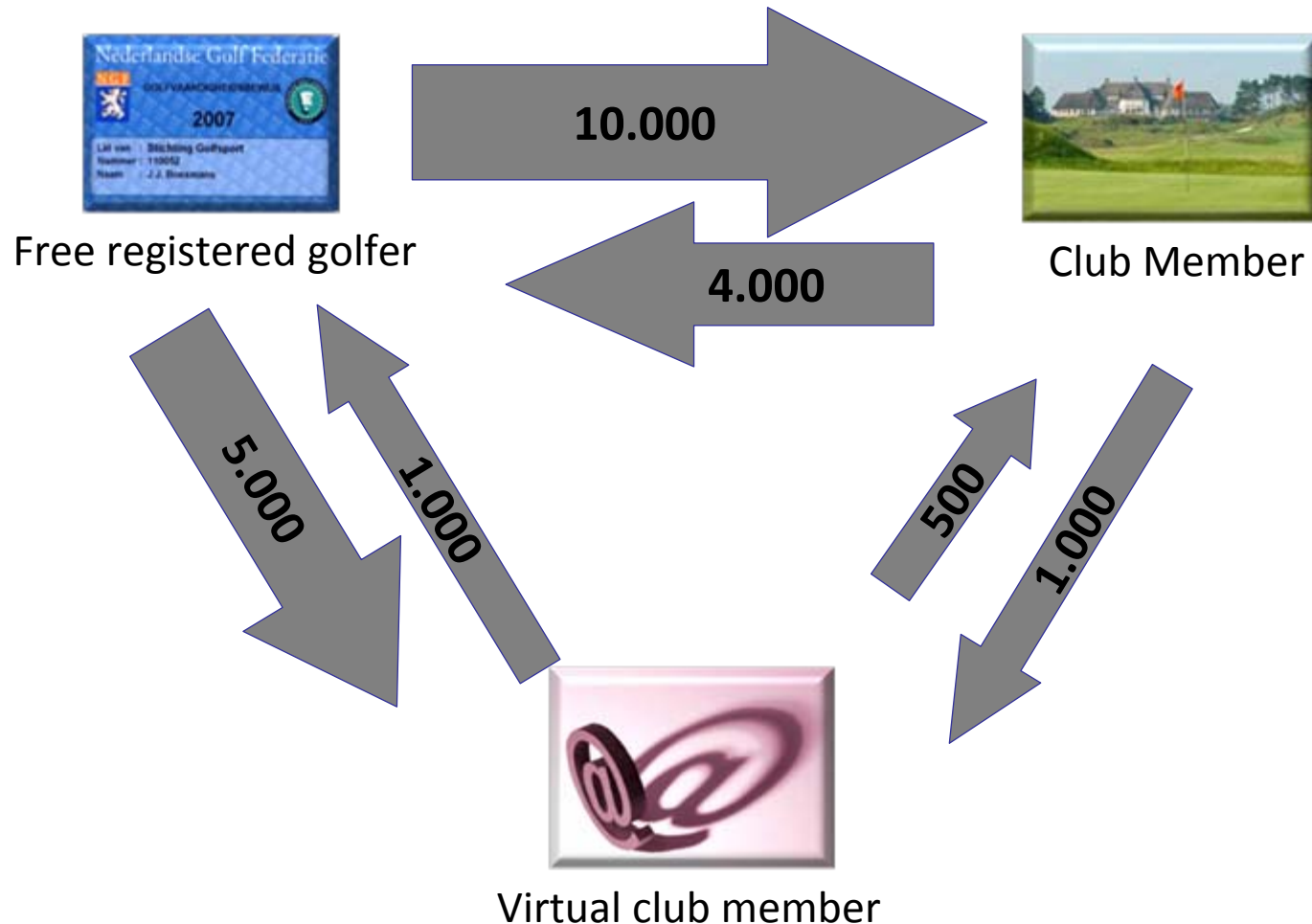
# Growth in Free and Virtual



# 2008: Biggest growth in free golfers



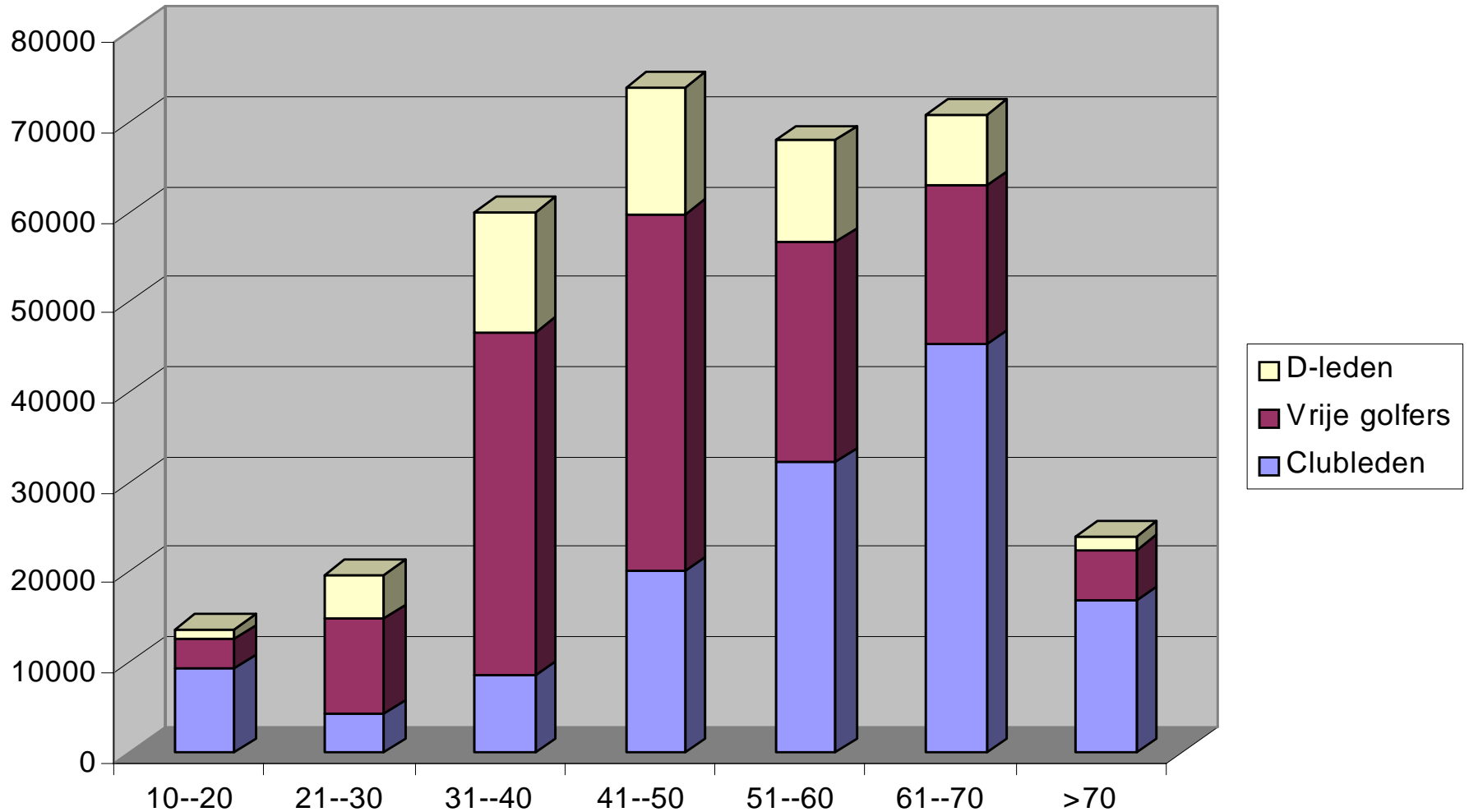
# 2008: Biggest migration from free to club and virtual



# Most cancellations with Club Members



# Seniors rule as club members



# Difference in average number of rounds per year

**4 rounds, 4% hcp.**



Free registered golfer

**36 rounds, 75% hcp.**



Club Member

**8 rounds, 37% hcp.**



Virtual club member

# Difference in average spending on greenfee per year

**Euro 160,-**



Free registered golfer

**Euro 1.050,-**



Club Member

**Euro 320,-**



Virtual club member

# Cooperation

Complementary Organisations



- Employers
- Operations
- Courses
- Supply



- Sport & Rules
- Players
- Demand
- Competition

Development Market



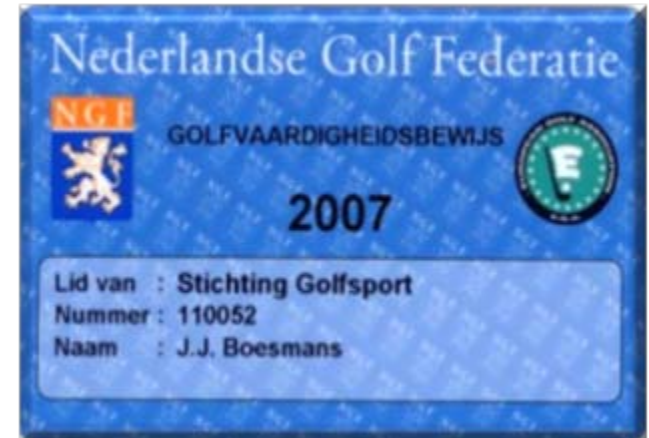
Labour unions



# The Golf License

Result:

- golf = commodity
- easy message
- low entrance barrier
- golf for all: 3 steps
- free golfers accepted
- golf nr. 3 and still growing strong
- golf follows social changes



# The Dutch Golf Industry

## Healthy

- supply 150 course 50/50
- demand 350.000 golfers
- > 2.000 golfers per course
- average 40.000 rounds per course