

# **“Increasing Nationwide Golf Club Membership & Participation”**

*Understanding purchasing determinants  
and attitudes towards club memberships  
for New Zealand golfers*

**March 2008 Survey**



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**March 2008 Survey**

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# 1. Executive Summary

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## 1.1 Research summary

Golf club memberships in New Zealand have declined 9% in the past 5 years. The trend appears to be following a global pattern for declining club membership and waning popularity of golf, presenting a major concern for golfing administration and management bodies in New Zealand, at both a local and national level.

In November 2007 New Zealand Golf commissioned this research to provide context to their strategic objectives to combat these trends. New Zealand Golf had already identified that membership growth could be achieved through two channels; 1) increasing the conversion rate to membership within the casual golfer population and 2) increasing retention rates among current members.

The research contained herein is the result of a nationwide survey targeting casual golfers and current members to investigate the attitudes and behaviours of these groups, as well as the value proposition of golf and club memberships.

Though not a revolutionary finding, it can be confidently concluded that time scarcity is the leading barrier to membership commitment across the casual golfing demographic. This presents an interesting challenge to a sport where the learning process is steep and the game alone requires at least a 2-hour 'time bite.'

Gender differences are clearly observed in terms of playing preferences and attitudes towards golf and club membership. Women are more concerned with their golfing abilities and more readily seek tuition to improve their skills than men. They also play more 9-hole golf (despite claiming to be less affected by time) and are more likely to commit to a membership than men once they begin playing golf.

Contradictory beliefs within the casual male golfing set were identified, particularly within time availability and the value of 9-hole golf.

Casual golfers report an attraction to membership options that provide greater playing and financial flexibility than traditional models. Developing 'transitional

membership packages' that have a reduced initial financial outlay, may provide reassurance to time-constrained casual golfers that memberships provide value for money.

Anecdotally there is great support for the regional membership concept, however statistics show this is possibly a more relevant membership concession as part of a retention strategy, given that this research found that members play more different courses than casual players.

To be most effective in the conversion of casual golfers to members, membership packages need to close the perceived gap created by the common equation cited by casual golfers:

$\frac{\text{perception of available time for golf} \times \text{casual green fees}}{\text{point of membership cost effectiveness}}$
--

It is also fair to conclude that other than creating greater flexibility in terms of time commitment, payment options and access to course variety – the assessment of membership value primarily comes down to cost effectiveness.

As the membership transaction is currently something that requires a player to estimate the anticipated value prior to consumption, it is reasonable to conclude that where memberships can reduce this risk perception – the uptake within the casual golfer population is likely to be favourable.

## 1.2 Summary of Key Findings

### *Gender/ demographic differences*

- Over half (53%) of casual golfers are aged between 25-44, compared to just 15% of members
- 1 in 10 casual golfers are women, whereas a quarter of members are women. Women that play golf are more likely to commit to membership than men.
- Women are more attracted to 9-hole golf and 9-hole memberships than men, yet women report to have more time than men.
- Casual women are more conscious of their golfing ability than men and more readily seek golf tuition

***Time is the critical barrier that influences casual golfers playing more golf and committing to membership***

- 42% of all casual golfers report that time is the single greatest barrier to gaining a membership
- Almost all (87%) casual golfers report they would play more golf if they had more time

***Golfers primarily play for social reasons***

- Social benefits are valued above all other membership benefits for current members
- Casual golfers report social reasons as their strongest motivator for playing golf

***The outlook for overall New Zealand golf participation is promising despite international trends***

- Half of casual golfers (50%) agreed that golf is their favourite sport or leisure activity and almost all (88%) report they want to play more golf than they do currently.
- Two thirds (66%) of casual players surveyed reported they plan on gaining a membership in the future

***Casual golfers are attracted to greater flexibility within memberships***

- Almost all (87%) casual golfers reported they would be more likely to purchase a membership if it allowed them to play a variety of local courses
- Three quarters (75%) of casual golfers surveyed reported they would be more likely to purchase a membership if it was determined by use rather than a fixed annual fee
- Two thirds (65%) of casual golfers surveyed reported they would be more likely to purchase a membership if there was more flexibility around payment of a fixed fee

## 2. Recommendations

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### 2.1 Implications in relation to the New Zealand Golf Strategy

A national recruitment campaign of casual golfers will rely on a number of conversion catalysts to promote the commitment of club membership. As the results of this research will show, the researcher believes that any initiatives that assist membership appeal within casual golfers will also work favourably within current member retention.

This research suggests the following broad tactics may be useful when devising both conversion and retention strategies:

- ***Make golf positive, inclusive and fun***  
Ensure casual golfers feel welcome and relaxed, both on the course and within club facilities. Results from this study reveal that less experienced golfers perceive golf clubs to be less welcoming than more experienced golfers.
- ***Retain the social perceptions of golf and the club environment, rather than child-proofing the game***  
Results clearly show that players view the game as a social interaction and environment rather than a family one.
- ***Encourage purchase of own equipment rather than hireage***  
A greater financial investment in the game promotes a greater commitment of time, subsequently making memberships more cost effective.
- ***Provide resources to improve the overall ability of the casual golfing population***  
Golfers of all abilities and experience levels want to improve their skills. This study confirmed that a large proportion of casual golfers would be more attracted to memberships that provide coaching facilities to help them improve.

- ***Create opportunities for casual golfers to play with existing members***  
Increased contact between casual golfers and committed members closes the perceived gap between the two golfing groups.
- ***Promote 9-hole golf to men***  
Promoting 9-hole golf as a game for men that is as equally competitive and skilful as 18-hole golf provides significant potential to grow 9-hole memberships for men.

This research explored different variations on club membership. Results and key membership themes are as follows:

- Learner memberships: focus on developing skills and confidence, increasing player enjoyment, increasing access to tuition and integration to the club environment
- Competitive memberships: encourage the next phase in casual player uptake - focus on developing comparable skill levels, provide provisional handicaps and encourage competition through access to a social internal league type structure
- Encourage growth of social networks through golf: discounted green-fees for members' friends, friend-get-friend membership offers etc
- Conjoint memberships: align with health and fitness facilities rather than other sporting codes to reduce the distraction from golf as a time competing leisure activity
- Tailor membership packages to fit specific occupational segments that best utilises current course facilities: i.e. weekday memberships for students, Monday memberships for hospitality staff etc

## 3. Introduction to the Research

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### 3.1. Introduction

New Zealand Golf identifies increasing club membership and overall golf participation as a key strategic objective in advancing the organisational vision for golf “as the sport of choice for all New Zealanders throughout their lives.”

This research has been commissioned to assist New Zealand Golf understand how the global trend of declining club membership can be combated from a unique New Zealand perspective.

This requires a strategy that not only secures the position of golf in the NZ sport and leisure landscape, but also provides enough flexibility and resilience within the sport to evolve and stay relevant for current and future golfing demographics.

This research will provide some insight and context for the following directives outlined in the New Zealand Golf Strategic Plan:

- national recruitment campaign targeted at casual/ non-member golfers – campaign target set to increase memberships by 2.5 % across all demographics
- focus on current membership retention

New Zealand Golf has identified the key role that individual clubs will play in the support and execution of this strategy to ensure that the current global trends can be comprehensively reversed within the New Zealand setting.

### 3.2. Research Philosophy and Objectives

#### *Philosophy*

At a high level, this research has been approached with the following philosophies:

1. Sampling and research methods must be directly relevant and appropriate within the golfing context

e.g. selection of sampling techniques that will capture the greatest proportion of relevant responses with available resources (best access to casual and member respondents)

e.g. selection of survey assistants with personal golfing experience to uphold necessary etiquettes when conducting interviews on golf courses

2. Positive engagement and informal consultation at the club management and administration level during this research will be valuable to New Zealand Golf for any subsequent and future initiatives in this area.

### *Objectives*

This research has been designed to explore the value proposition of golf club memberships from the perspectives of casual and member golfers in New Zealand. The specific objectives of this research are defined as:

1. To understand and conceptualise a typical individual pathway from introduction to golf, to commitment to the sport via a club membership
2. To understand the initial motivations for playing golf within the casual golfer segment
3. To understand the barriers that exist for casual players in their evaluation of club membership value
4. To understand the main value proposition of club membership for current affiliated golfers
5. To identify and analyse value perception for specific membership benefits within the casual golfer population to inform and optimise strategic initiatives to grow the New Zealand membership base

### 3.3 Relevant Secondary Research

#### *Golf in the New Zealand Context*

2005 figures from SPARC state that golf remains the nation's most popular sport with 500,000 adult New Zealanders playing at least once a year. Golf leads all other sports across all age ranges except 18-24 year olds where it places second to touch rugby. In New Zealand it has the highest participation rates of any code for adult men, and is second only to netball for adult females.

However while golf remains very popular, actual membership numbers have been in decline for the past 5 years, down 9% to 123,000 (New Zealand Golf, 2007). The declining conversion rate (presently just 26%) from new/casual golfer to registered member is a growing concern for financially challenged club administrations. The statement "asset-rich and cash-poor" is used to describe the predicament of the majority of New Zealand's golf clubs, whereby increasing memberships has the potential to inject financial liquidity and sustainability back into the future of golf in New Zealand.

#### *Looking to International Markets*

Golf in the USA, as a sport and a business, is also experiencing significant challenges; figures from the National Golf Foundation confirm that overall golf numbers have fallen from 30 to 26 million since 2000 while committed and regular-playing golfers (25 games per year) have declined by a 1/3 in the same period.

The US market refers to its hey-day being the decade of the 90's – a time when golf clubs enjoyed an expanding market where aging baby boomers and economic prosperity combined to increase demand for memberships. In this post-boom decade, the US is now citing an oversupply of newly constructed golf clubs, longer work hours, stagnant wages and a change in business culture towards travel & entertainment expenditure as major economic obstacles for the golf club industry to overcome.

A similar trend is observed in Australia where a survey canvassed across 1500 affiliated clubs discovered membership numbers had fallen 3% in the past 5 years.

### ***Changing Lifestyles***

In an environment where the old adage “time is money” is increasingly true, it follows that recreational and leisure activities requiring a significant time commitment are becoming the new luxury lifestyle niceties – where the real cost is measured via time credit from work or family, rather than by the dollar dent in your bank account. Dwindling disposable time borne out of family commitments, longer work hours and increased leisure choices are commonly cited as threats to the future of golf in New Zealand and worldwide.

It can be argued that golf is seen as more of a commitment than a release, mainly because of the time component, and therefore it runs the risk of being in competition with life’s essential commitments – “family time, work time and play time”. For it to be an efficient use of “play time” it needs to compete on a values basis with emerging leisure activities of shorter time bites. Analysts worldwide are calling for a reinvention of golf based on both measures of quality and quantity. A similar trend is perhaps emerging for audiences of international cricket, where 20-20 games are responding to a demand for an increased excitement and decreased time version of a well respected, traditional sporting code.

A 4-hour game of golf may not be a luxury that the emerging golf demographic can continue to afford. In response to the “time squeeze,” 9-hole golf options are now being offered.

### ***Changing Demographics and Related Sporting & Recreation Trends***

Stagnant or dwindling memberships are not confined to just golf. Numerous other codes such as lawn bowls, tennis and squash are struggling to attract and retain players also.

Further research from the recreation industry in the US concludes the recent disappearance of golfers is part of a broader decline of many outdoor activities such as tennis, swimming, hiking, biking and downhill skiing. Meanwhile, the overall health and fitness industry is growing exponentially. This could suggest that traditional sport’s survival will depend on its ability to align itself with the increased personal health and well being of its participants – particularly relevant to the aging baby boomer demographic.

The US market notes that the major challenge facing golf club management is hitting the right balance between planning and catering for a new younger,

more lucrative demographic whilst respecting the contribution and commitment of an older and established membership base.

However there may be no saving grace in relying entirely on the enthusiasm of future generations of golfers. Rugby within New Zealand secondary schools is also feeling the pinch. A recent report found that rugby has an unhealthy reliance on “a generation of non-committers more likely to want to play at a recreational level and unlikely to commit to regular practices”. This is not good news for golf, a sport with a steep learning curve faced with the prospect of engaging a group that expects “to play without reading the instructions.” It appears that the generational debate and the courting of Gen-Y is now also the domain of golf club management as it is for other parts of the economy.

Worldwide, golf's membership base is aging and is typically underrepresented in the 20-40 year age bracket. Currently within New Zealand there is a predominance of small golf clubs that function on the goodwill of volunteers and committed members, who are often mature in age and less time poor than the potential membership demographic. Critical to growing future memberships will be reconcile the views and perspectives of the current golfing core, with the innovation required to meet the demands of the future golfing demographic.

### ***Negative Impact Factors***

US consulting company McMahon Group specialises in private club membership research and strategy (including golf clubs). Having researched more specific variables other than the concept of “time” they found that their client base (golf club administrations and other private clubs) cite the following factors as negatively impacting club membership growth:

1. poor economic influences (69%)
2. increased golf competition (44%)
3. increased dining competition (25%)
4. high-cost of establishing and maintaining a membership (25%)

### ***Strategies to Combat Membership Decline***

A 2004 McMahon Group survey suggested that clubs ranked the following tactics as the best ways to combat membership decline:

1. providing facilities/ services that are attractive to younger potential members (rated effective by 71% of clubs)
2. having a more active membership committee (64% of clubs)
3. providing a more casual lifestyle at the club (57% of clubs)
4. adding specific recreational facilities (55% of clubs)
5. improving the club building/facilities (53% of clubs)
6. offering incentives to existing members for bringing in new members (52% of clubs)

This survey also revealed that 68% of golf clubs have concentrated resources on “new member recruitment programmes”. When reviewing the style and success of these campaigns, McMahon Group found that:

- common tactics include lowering or eliminating the initial cost outlay (49% of campaigns), financial incentives to existing members for proposing new members (44%), special time payment offers (39%) or limited-time offers (36%)
- club management state their experience with public media advertising when recruiting for golf club new members was successful (41%), neutral (47%) and unsuccessful (12%)
- campaign results vary from;
  - 4% achieved 101 or more new members
  - 12% achieved 51-100 new members
  - 29% achieved 26 – 50 new members
  - 55% achieved 25 or less new members

## 4. Research Method

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### 4.1 Overview

The following table provides key milestone dates for the project:

Stage	Project Milestone	Date
1	Proposal complete	5 November 2007
2	Proposal acceptance from New Zealand Golf	12 December 2007
3	Casual player sample – survey design approval received	23 December 2007
	Casual player sample – survey pre-test	24 December 2007 – 4 January 2008
	Casual player sample – field work	7 January 2008 – 3 March 2008
	Member player sample – survey pre-test	11 January 2008
	Member player sample – field work	18 January – 3 March 2008
4	Casual player sample – phone survey design approval received	4 March 2008
	Casual player sample – phone survey pre-test	4 March 2008
	Casual player sample – phone surveying	5 March – 11 March 2008
5	Case study design for focus group	10 March 2008
	Focus groups conducted	11 & 12 March 2008

The information for this research was collected via a combination of face to face surveying, paper-based survey forms, phone interviewing and interactive focus groups.

### *Sampling*

Stage 3: involved collecting information via face to face survey interviewing and paper based survey forms from 2016 casual golfers and 589 existing members nationwide.

Stage 4: involved collecting information from 408 randomly selected casual golfers (contact initiated at stage 3) via an 8-10 minute phone survey.

Stage 5: involved conducting 2 focus groups of casual golfers at a Wellington golf club.

This research was designed to explore the attitudes and behaviours within the known golfing population in order to maximize the depth of information within the available budget. Therefore common sampling techniques to exclude bias within a broader sample were not employed i.e. no randomised sampling of general populations was deemed relevant for New Zealand Golf's intentions for this research.

With the approval of New Zealand Golf the large casual and member samples were limited by two techniques:

1. targeting specific golf locations (golf courses, club facilities, driving ranges)
2. qualifying question to determine golfer-type, including exclusion of all responses from non-golfers

#### **4.2 Collection Locations**

Surveying locations were selected in order to provide a comprehensive nationwide cross-section of golfers.

To gain wider sampling coverage this research also relied on the participation of local golf club managers and administrators to collect responses via paper based survey forms at their course facilities.

The researcher traveled to over 42 urban and rural golf courses to meet with and engage club management in the research process. The researcher remained in regular weekly contact with the club's management. Survey forms were returned to the researcher via pre-paid post 3 – 4 weeks post the initial face to face meeting.

Casual and member survey responses were collected by 2 methods:

- Face to face survey interviewing at 7 public golf courses (i.e. that have high 'casual golfer' traffic)
- Drop-box collection of paper based survey forms at 42 participating golf clubs (prompting 'casual' green-fee golfers to complete short survey forms at the point of transaction – i.e. pro-shop, club office etc)
- Face to face interviewing at participating club facilities

Method	Region	Participating Courses
Face to face survey interviewing	Auckland	Chamberlain Park Public Golf Club
		Takapuna Golf Club
		Papakura Golf Club
	Wellington	Hutt Park Golf Park
		Silverstream Public Golf Club
		Berhampore Public Golf Club
	Christchurch	Ascot Park Golf Club
Paper based survey forms & drop box systems	North Harbour District	Huapai Golf Club
		Pupuke Golf Club
		Warkworth Golf Club
		Whangaporoa Golf Club,
	Auckland District	Clarks Beach Golf Club
		Maungakiekie Golf Club
		Papakura Golf Club
	Taranaki District	Fitzroy Golf Club
		Kaitake Golf Club
	Manawatu District	Castlecliff Golf Club
		Palmerston North Golf Club
	Hawkes Bay District	Dannevirke Golf Club
	Wellington District	Hutt Golf Club
		Wainuiomata Golf Club
		Shandon Golf Club
Otaki Golf Club		
Mornington Golf Club		
	Martinborough Golf Club	

		Manor Park Golf Club
		Karori Golf Club
		Kapiti Golf Club
		Silverstream Public Golf Club
		Berhampore Public Golf Club
		Judgeford Golf Club
		Carterton Golf Club
		Featherston Golf Club
	Nelson District	Motueka Golf Club
		Waahi Taakaro Golf Club
		Nelson Golf Club
	Marlborough District	Blenheim Golf Club
		Malborough Golf Club
	Canterbury District	Hagley Park Golf Club
		Templeton Golf Club
		Russley Golf Club
		McLeans Island Golf Club
		Harewood Golf Club
		Kaiapoi Golf Club
	Aorangi District	Timaru Golf Club
	Otago District	Chisholm Park Golf Club
		Taieri Golf Club

### 4.3 Content

#### *Casual Golfers – Short Survey*

A short survey (1-minute duration) containing 13 questions was developed for collection of information from casual golfers. This large sample (2016 casual golfers) provided the total potential respondents for the phone survey.

Responses were collected via face to face survey interviewing and paper based survey forms at the locations specified in 4.2 of this report.

Please view report appendix 7.1 Casual Golfers Survey Form for a demonstration of the survey questions.

The casual golfer survey was designed to explore:

- Demographic information  
(*age, gender, region*)
- Historical and current golfing behaviours  
(*time playing golf, recent frequency of play, recent courses played, average green fees paid to play, previous membership experience*)
- Key barrier to membership acquisition

Although the survey had the potential to be anonymous, an incentive prize draw was offered to participants in turn for their name and contact number. Participants were also asked whether they were willing to participate in a more detailed phone survey (8-10 minutes duration, see below) where a further prize incentive was offered.

### ***Member Golfers – Short Survey***

A short survey (1-minute duration) containing 13 questions was developed for existing members. This survey elicited responses from 589 members from clubs across New Zealand.

Responses were collected via face to face survey interviewing and paper based survey forms at the locations specified in 4.2 of this report.

Please view report appendix 7.2 Members Survey Form for a demonstration of the survey questions.

The members' survey was designed to explore:

- Demographic information  
(*age, gender, region*)
- Historical and current golfing behaviours  
(*golfing ability, recent frequency of play, recent courses played, affiliated green fees paid, membership status, total golf memberships held*)
- Main benefit of current golf membership

The questionnaire was anonymous but an incentive prize draw was offered participants, and names and contact numbers collected.

### ***Casual Golfers – Comprehensive Phone Survey***

A phone survey (8-10 minutes duration) containing 48 questions was developed to further explore responses from the sample of 2016 casual golfers. Of these, 1085 (54.3%) indicated a willingness to be contacted for future surveys.

Subsequently 408 original respondents were successfully interviewed by phone, representing a successful contact rate of 37.6%.

Please view report appendix 7.3 Casual Phone Survey Form for a demonstration of the survey questions.

The phone survey was designed to explore:

- Original motivation to play and nature of introduction to golf
- Current golfing behaviours (greater detail)
- Assessment of current ability and knowledge of golf
- Other sporting/ leisure commitments
- Attitudes towards golf, club membership and specific membership benefits
- Future intentions towards membership and likely method of enquiry

An incentive prize draw was offered to participants to complete the phone survey.

### ***Focus Groups***

Two focus groups were conducted as part of this research to explore preliminary findings of the phone survey, and promote discussion about attitudes and motivations towards golf and club memberships. Focus groups were facilitated by Stephen Whitaker (the Researcher) and Rachel Grant, Marketing Analyst from Victoria University.

Focus group participants were male and lived within the Greater Wellington region. Participants were selected from the phone survey process as well as by word of mouth referral. Refreshments and incentives were provided.

None of the participants had golf membership experience but all played golf on an occasional to frequent basis.

Group 1 consisted of six male golfers who were:

- Less experienced ( $\leq 5$  years playing golf)
- Aged between 22 – 38
- No previous golf membership experience

Group 2 consisted of six male golfers who were:

- Experienced golfers ( $> 5$  years playing golf)
- Aged between 24 – 36
- No previous golf membership experience

Focus groups were interactive with each participant completing a case study where they had the opportunity to 'design' their ideal membership.

Please view report appendix 7.4 for a copy of the case study used.

#### **4.4 Demographic categories**

Findings and analysis according to gender and age range are provided as part of section 5 and 6 of this report.

#### **4.5 Budget**

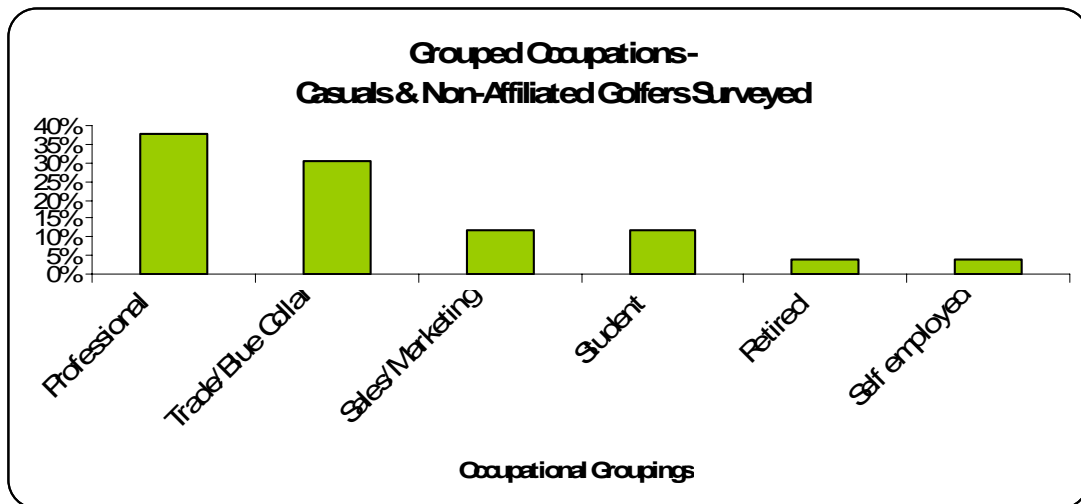
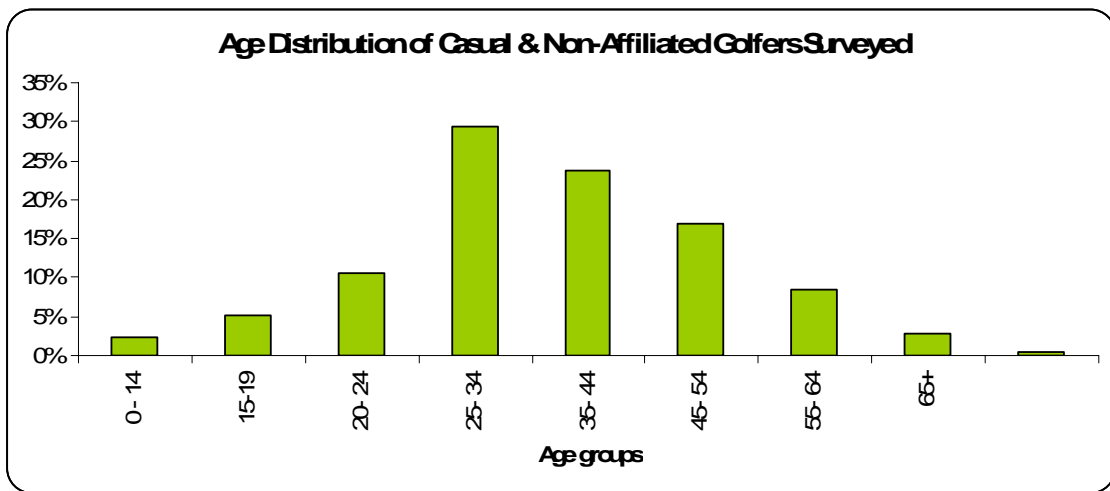
Please refer to appendix 7.5 for the final expense statement.

## 5. Main Findings

### 5.1 Casual Golfers – Short Survey Results

The following key data was obtained via a short survey of casual golfers. The total no. of respondents was 2016 individuals.

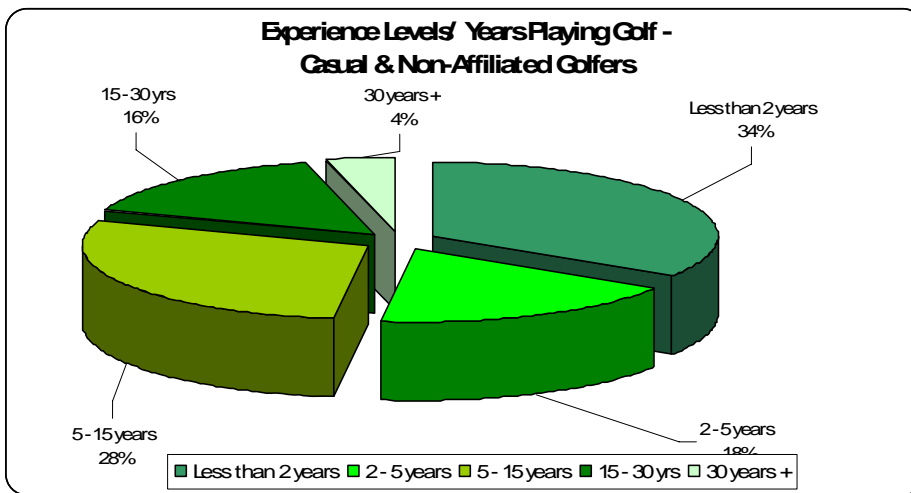
#### *Key Population Characteristics*



- Gender distribution: 89% of casual golfers are male, 11% are female

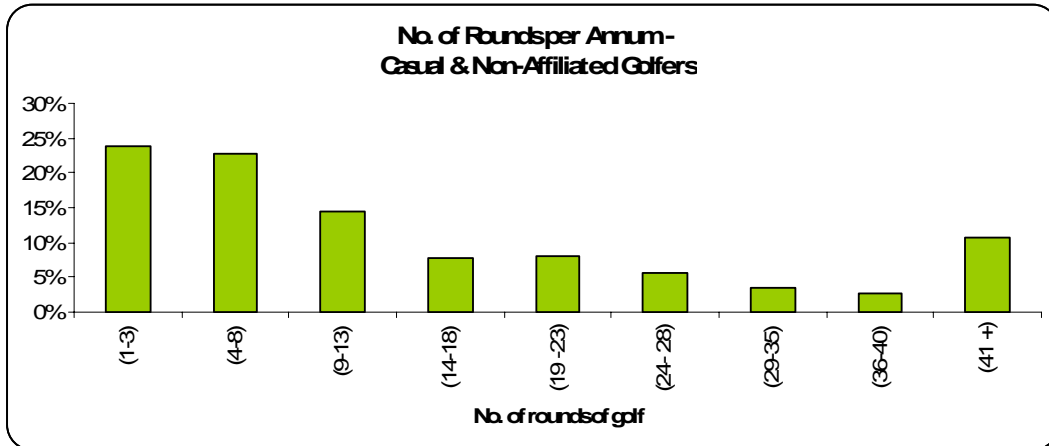
- Age: almost half of casual golfers (47%) are under the age of 35
- Age: casual golfers are most heavily represented (53%) within the 25-44 age bracket
- Age: one in eight (12%) casual golfers is over the age of 55 and 4% is of retirement age.
- Occupation: Professionals represent the largest industry group of casual golfers (38%)
- Occupation: Students account for 12% of all casual golfers

### *Golfing Experience*

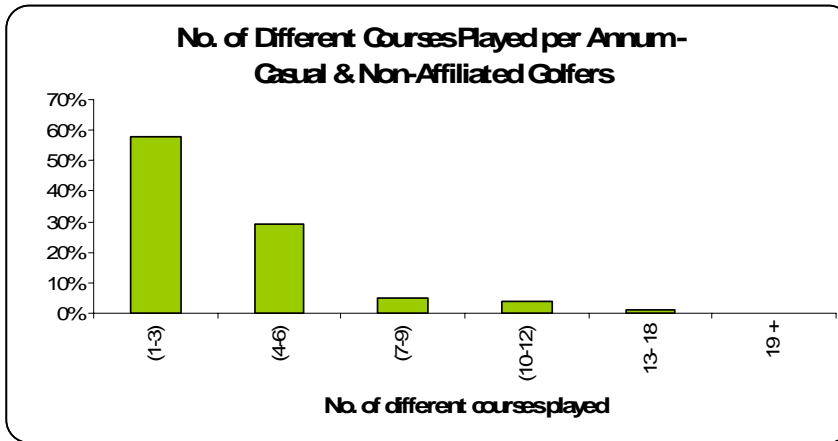


- A third (34%) of casual golfers have been playing golf less than 2 years
- 4% of casual golfers have been playing golf for more than 30 years.
- 19% of all casual golfers have had previous membership experience

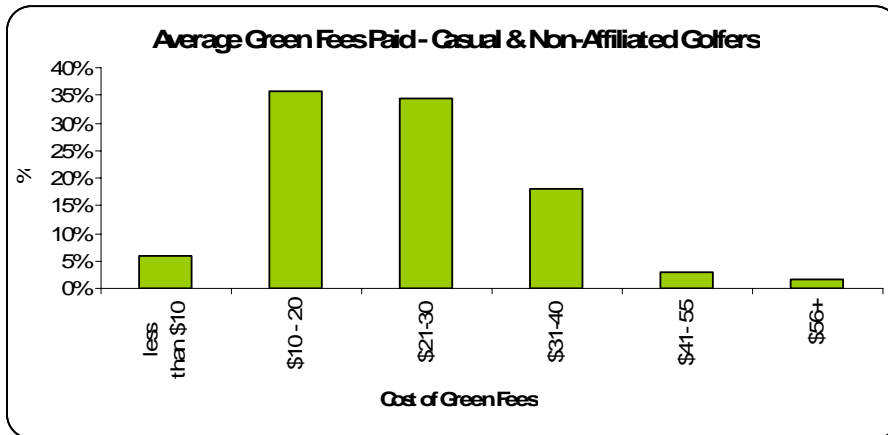
**Behavioural Indicators**



- About half (47%) of casual golfers played less than 9 games of golf in the past 12 months
- Almost a quarter (23%) of casual golfers played golf every two weeks
- 11% of casual golfers played more than 40 games of golf in the past 12 months

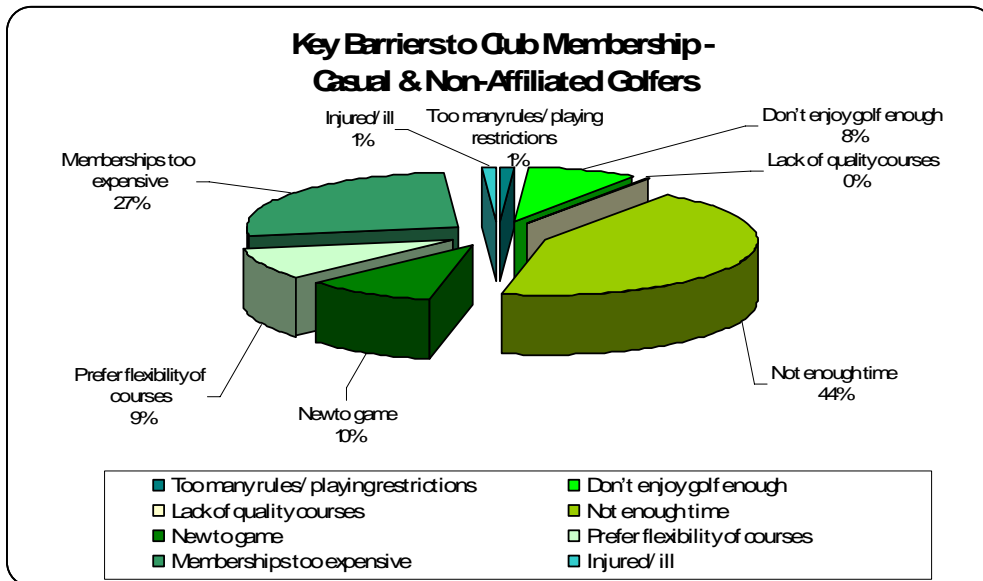


- Over half (58%) of casual golfers played fewer than 4 different golf courses in the past 12 months
- 13% of casual golfers played 7 or more different golf courses in the past 12 months



- On average casual golfers spend \$23 for a game of golf
- 23% of casual golfers pay in excess of \$30 on average for a game of golf
- 5% of casual golfers pay in excess of \$40 on average for a game of golf

**Key Barriers to Membership**



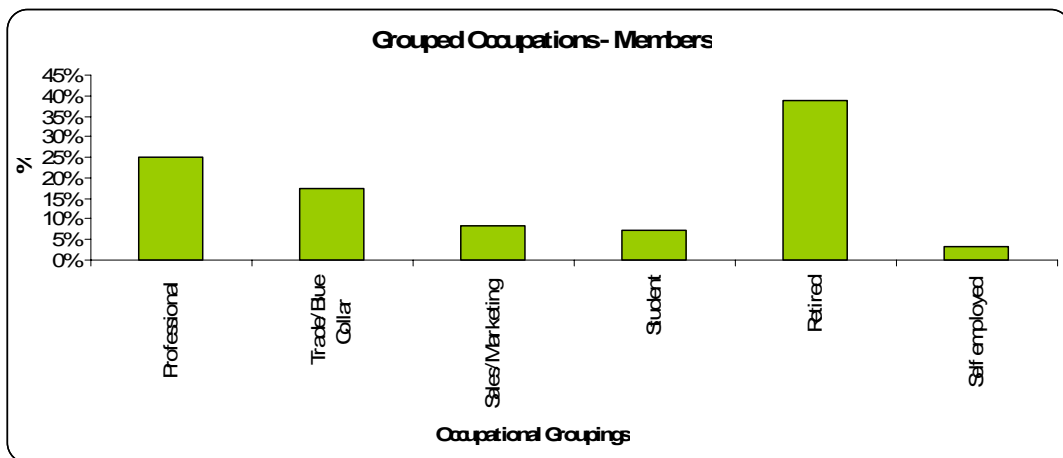
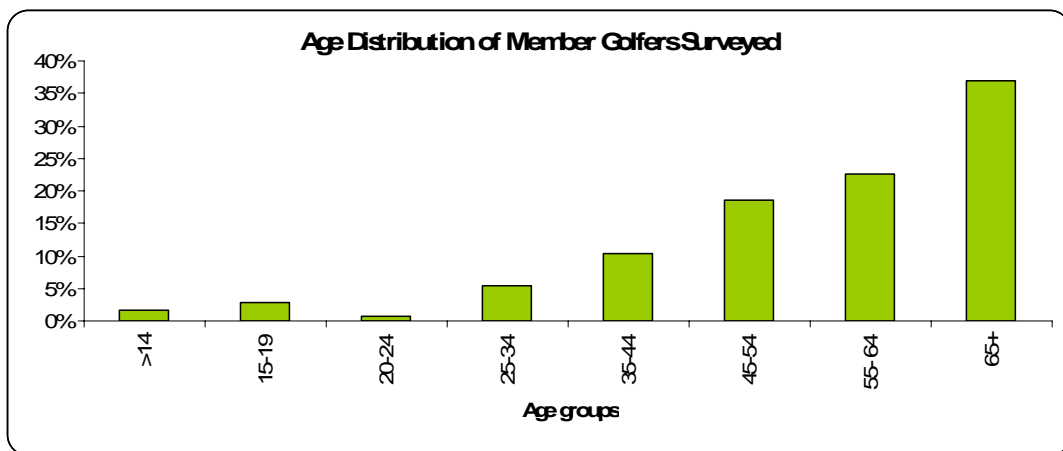
- 42% of all casual golfers report time as their biggest barrier to membership
- 26% of casual golfers report membership costs as their biggest barrier to membership

- 1% of causal golfers report playing restrictions and prohibitive rules (i.e. dress code) as being their biggest barrier to membership

## 5.2 Member Golfers – Short Survey Results

The following key data was obtained via a short survey of member golfers. The total no. of respondents was 589 individuals.

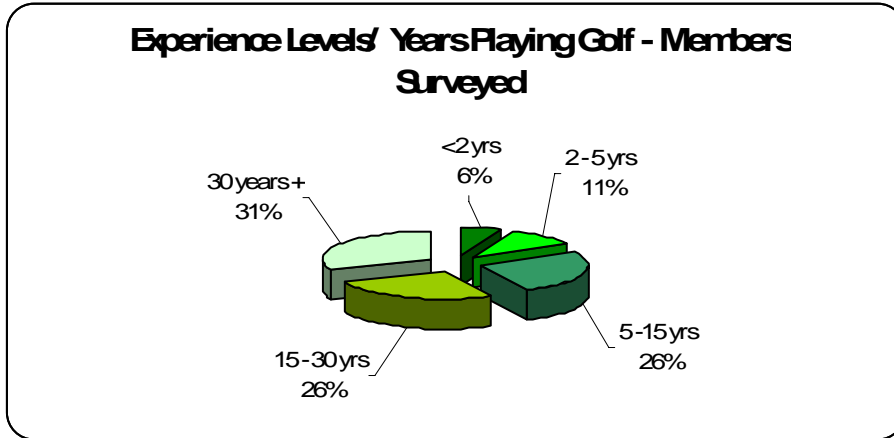
### Key Population Characteristics



- Gender: 75% of members are male, 25% are female
- Age: 60% are over the age of 55, of which 37% are of retirement age
- Age: 15% of members are between the age of 25-44
- Occupation: Over a third (38%) of members surveyed are retired

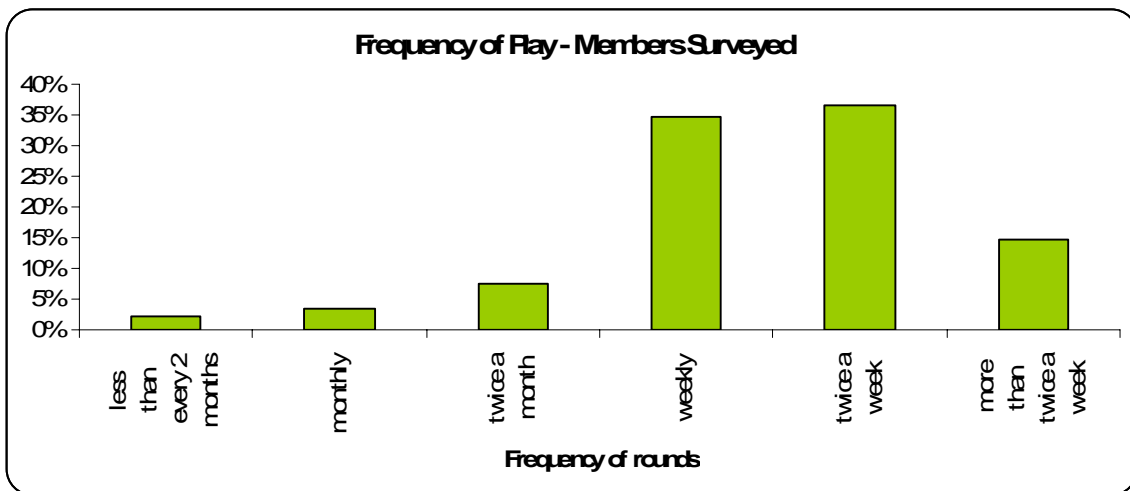
- Occupation: A quarter (25%) of members surveyed are professionals
- Occupation: 17% of members surveyed work within trade/ blue collar work types

**Golf Experience**

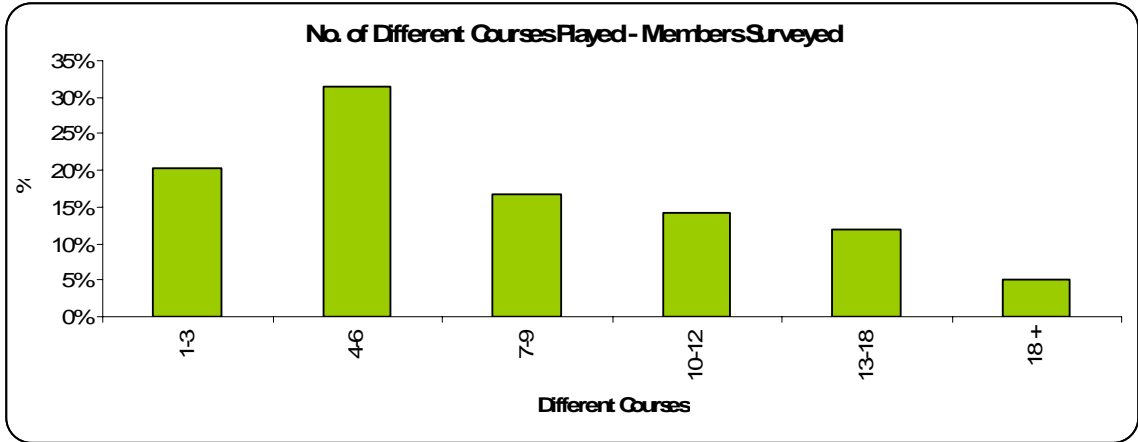


- Almost a third (31%) of members have been playing golf for over 30 years
- 16% of members have been playing golf for less than 5 years
- 79% of all members hold 'full playing' memberships

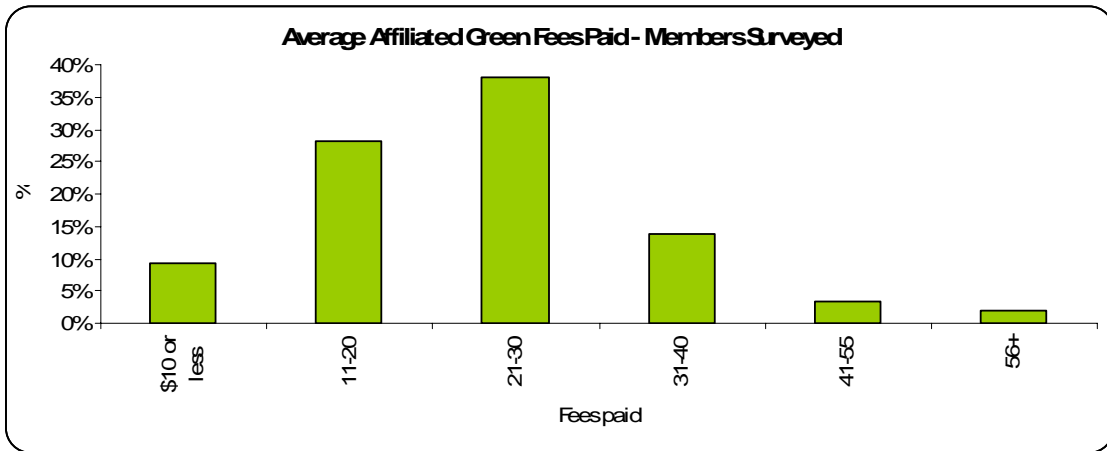
**Behavioural Indicators**



- 82% of members play golf at least once a week
- 15% play golf more than twice a week

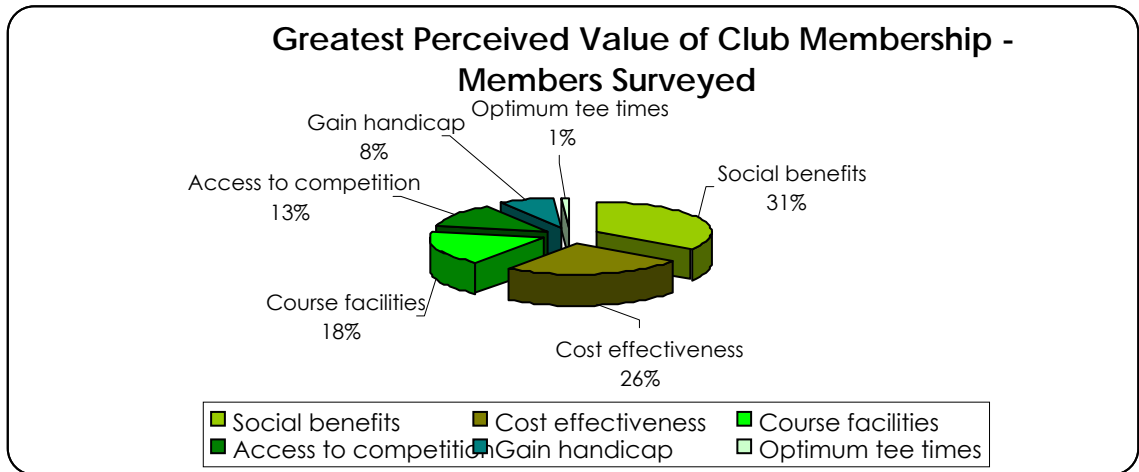


- Over half of members (51%) have played on fewer than 7 different golf courses in the past 12 months



- Members on average spend \$22 for affiliated green fees
- Over a third (37%) of members pay less than \$20 for their affiliated green fees
- A fifth (19%) of members pay over \$30 for affiliated green fees

**Key Values for Club Membership**



- 31% of members value social benefits above all other benefits of their membership
- 1% of members value securing optimum tee times above all other benefits of their membership.

**5.3 Casual Golfers – Comprehensive Phone Survey**

The following key data was obtained from the detailed phone surveys conducted with casual golfers identified at the short survey stage. A total of 408 phone surveys were conducted, exhausted from a pool of 1085 potential contacts available from the 2016 short survey respondents.

***Understanding the Individual Pathways to Golf – Key Statistics***

- 43% were introduced to golf through a family member (including spouse)
- 40% were introduced through a friend/ social network
- 7% started golf independently

***Understanding the Initial Playing Motivations – Key Statistics***

- 38% began playing golf for social reasons
- 35% began playing golf to learn a new physical activity
- 7% began playing golf because golf appealed as a sport

### ***Key Preferences and Behaviour – Key Statistics***

- 67% usually play 18 holes when they play golf
- Only 3% prefer to use the driving range rather than play golf at a course
- About half (51%) prefer to play golf on weekends
- 18% prefer to play on weekdays
- 28% prefer to play golf in the early morning (6am - 9am)
- 26% prefer to play golf in the late morning (10am - 12pm)
- 55% prefer to play in summer, although 49% will play in all weather conditions

### ***Availability – Key Statistics***

- 54% report their available time allows them to play golf at least once a week
- 11% report their available time allows them to play golf less than once a month

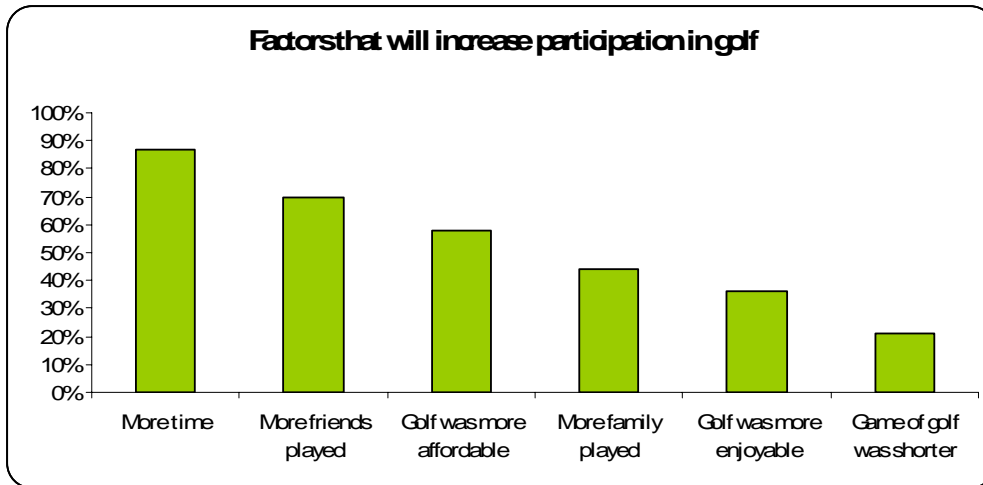
### ***Golfing Ability – Key Statistics***

- 75% report they usually score less than 100 for 18 holes
- 90% keep score when they play golf

### ***Other Interests and Commitments – Key Statistics***

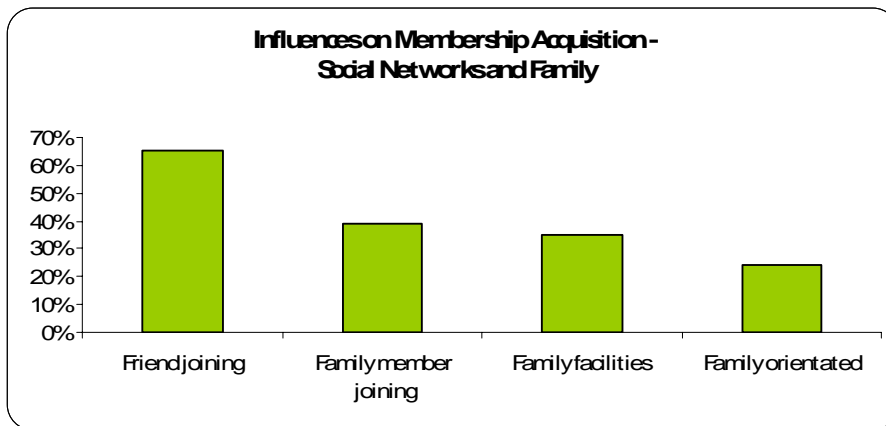
- 36% hold memberships of other sporting/ recreation organisations
- 9% hold memberships at gyms (most common membership held)
- For a quarter (25%) of them, golf is the only sport they play
- A third (34%) currently participate in 2 or more sports other than golf
- 50% of casual golfers report that golf is their favourite sport or leisure activity

*Factors to Increase Participation – Key Statistics*



- Time is the most significant factor; 87% agreeing they would play more golf if they had more time
- In spite of their limited time, very few agree (just 21%) that shortening the game of golf would result in them playing more golf
- Friends play a pivotal role; 70% agreeing they would play more golf if more of their friends played
- Less significant was the role of family; 44% agreeing they would play more golf if more of their family played
- The price of golf had some effect; 58% agreeing they would play more golf if golf was more affordable.
- Most did not agree their level of enjoyment affected the amount of golf they play; just 36% agreed they would play more golf if they enjoyed the game more.

*Exploring the Influences: Social Networks and Family*



- Friends have a stronger influence on potential membership acquisition than family; 65% agreed they would be more likely to purchase a membership if a friend joined whereas only 39% reported they would be more likely to purchase a membership if a family member did also
- Family friendly facilities are only moderately valued as part of membership benefits; only 35% agreeing these would increase their likelihood of purchasing a membership.
- Few casual golfers value golf clubs becoming more family orientated; just 24% agreed this would increase their likelihood of purchasing a membership.

*Exploring the Influences: User Perception of Golf Clubs*

- Increasing the welcoming atmosphere and inclusiveness of golf clubs was favourable for membership acquisition; 41% agreed this would increase their likelihood of purchasing a membership.
- Fewer casual golfers were motivated by increasing the social element of the actual club environment; 34% agreed that if golf clubs were more social they would be more likely to purchase a membership

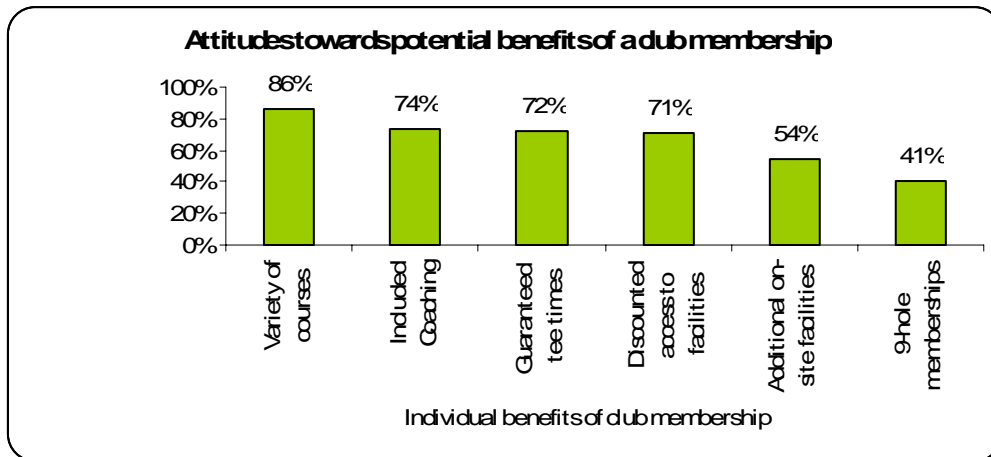
**Exploring the Influences: Individual Ability and Knowledge**

- Golfing ability appears to correlate with willingness to commit to membership: 54% agreed they would be more likely to purchase a membership if they were a better golfer
- 69% report a good understanding of the rules of golf and only 9% reported to have no understanding
- Understanding of membership benefits were varied: 52% reporting a good understanding of the benefits of holding a membership, however up to a quarter (25%) reported no understanding of the concept of membership benefits
- Less than half (48%) understand the handicapping system well, with a third (34%) reporting no understanding

**Exploring the Influences: Impact of Price**

- The ability to purchase a membership according to the amount of golf they played was popular; 75% agreed they would be more likely to purchase a membership if the price was determined by the amount of golf they played within a specified time period.
- Two thirds (65%) reported they would be more likely to purchase a membership if there was more flexibility around paying for the membership

**Exploring the Influences: Membership Perks**

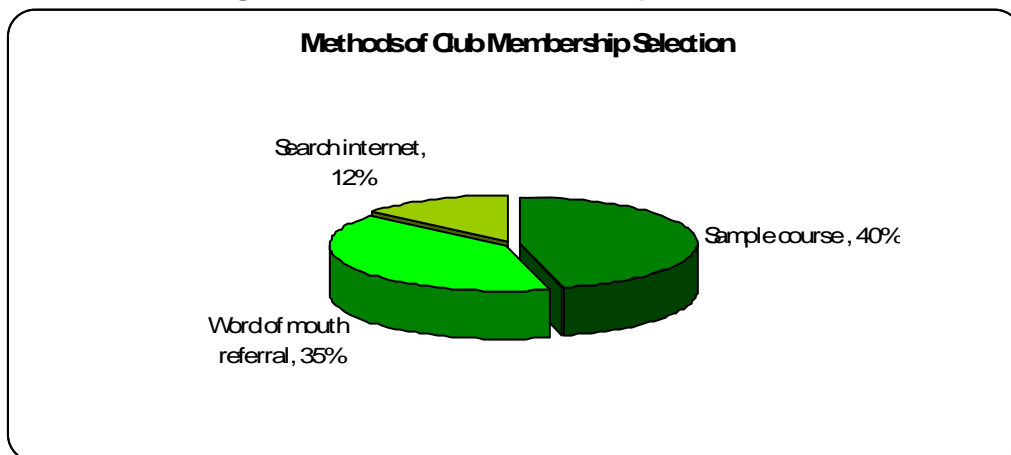


- Casual golfers strongly value playing a variety of courses; 86% agreed they would be more likely to purchase a membership if it allowed them to play a variety of different courses
- Improving their skills through coaching was important to casual golfers also; 74% agreed they would be more likely to purchase a membership if coaching was offered as part of the package.
- Being able to play the course at times that suit is desirable also; 72% agreed they would be more likely to join a golf club if they could have guaranteed access to the course at convenient times
- A golf membership that provided discounted access to other sporting organisations was valued; 71% agreeing this would increase their likelihood of purchasing a membership
- Of lesser importance was having additional on-site facilities; 54% agreeing this would increase their likelihood of purchasing a membership
- Even fewer casual golfers valued being able to secure a 9-hole membership; Just 41% agreeing they would be more likely to purchase a membership if they could join as a 9-hole member

### ***Future Intentions for Golf Participation and Club Membership***

- Almost all (88%) casual golfers want to play more golf than they do currently
- Three quarters (75%) believe they will play more golf in the next 5 years than they do currently
- A third (66%) report they plan on gaining a membership in the future

### ***Decision Making around Club Membership Selection***



- Two thirds (64%) of casual golfers have made enquiries into memberships in the past
- In order to inform their decision over club membership selection, 40% reported they would initially sample the course, 35% reported they would rely on a word of mouth referral and just 12% reported they would source information through the internet.

#### 5.4 Casual Golfers – Focus Groups

The following is a summary of the key information regarding casual golfer attitudes and preferences as gained from the focus group process.

##### *Introduction to the Game*

- Casual golfers begin playing golf with friends and family or at work or corporate event
- They continue to play with friends or family and when on holiday

##### *Financial Commitment*

- A low level of financial commitment through equipment purchase was noted; usually a moderately inexpensive set of clubs, at times inherited. Few had made any recent golf-related purchasing
- Lesson consumption was noted to be very low – “*I don't play enough to justify getting a lesson from a pro*”

##### *Golfing Preferences*

- New casual golfers report they are more likely to play 9 holes than longer term golfers.
- For some, 9-hole golf allows greater golf accessibility due to time pressure and generally this satisfies their golfing needs.
- 9-hole golf is more likely to be spontaneous, whereas 18-hole golf may involve some planning

- Weather on the day was noted by most to be more important than season/time of year, although golf was more common in summer (longer sunshine hours)
- Most reported playing golf around once or twice a month

### ***Perception of Golf***

- Golf is viewed as an active social and leisure activity rather than a sport, yet golf is played by people who play sport
- Golf is commonly seen as a sporting option post ceasing alternative sports (i.e. following injuries) *"I was looking for a sport to play after rugby league"*
- All report they are competitive both with themselves and with others when they play golf – *"I will always try and beat the guys I play with"*
- All expressed a desire to improve and some level of frustration at the difficult learning curve of golf
- Most elicited an interest in gaining a handicap

### ***Role of the Driving Range***

- For new golfers, going to the driving range is a fair substitute for playing on the golf course
- For longer term golfers the range is more a practice facility than a substitute for playing on golf course
- Most golfers go to the range at some point but all prefer playing at a course

### ***Golf Club Experiences***

- Most report a general friendly experience at golf clubs but many are conscious of their skill level and prefer not to be watched by members or club administrators, 'first tee apprehension' – *"I will use a small club on the first tee just to get down the fairway away from all the people watching"*
- Club choice is driven largely by price, variety and a comfortable feeling in environment.
- The cost of a game of golf drives the choice of club much more than the quality of course although the relative importance of cost vs. quality evolves as golfers improve and become more discerning

- Golf clothing was not reported as an issue, casual golfers do not expect to wear jeans or a tee shirt when they play.
- Price has significant impact on their perceptions of the golf club. Their belief is that the more expensive the club, the less welcoming it will be.

### ***Sourcing Information***

- Casual golfers often use the web or phone book (yellow/ white pages) to contact golf clubs if they are local
- A few have visited the club directory on [www.nzga.co.nz](http://www.nzga.co.nz)
- Many will use web searches to find out about golf courses in a certain area “key word search ‘golf – location’
- Many believe that golf clubs should have websites that provide pictures of the course, and portray a welcoming image to casual golfers and new members and list benefits such as special offers and reciprocal offers.
- Some value the ability to book tee times online but most are happy to book over the phone
- Most report a following of “headline golf” in the media, some report to watch golf for short periods on sky television. Most had little awareness of golf related sponsors.

## 6. Conclusions

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### 6.1. Gender differences – casual golfers

#### *Fewer women than men have held golf memberships in the past*

Only 8% of casual female golfers have been members before, compared to 20% of casual male golfers.

These figures perhaps indicate that women have better membership retention rates than men, or if they let a membership lapse they are more likely to discontinue participation in the sport entirely.

#### *Male casual golfers play more often and play on more different courses than female casual golfers*

In the last 12 months, 78% of males played four or more games of golf compared to 62% of females. In terms of frequency of games per month, 43% of males stated they played golf at least once a month, compared to just a quarter (25%) for females playing as frequently. Again, males showed a greater commitment to play on different courses with 43% playing four or more different courses, compared to 30% of females. The comprehensive survey reiterated these initial findings, where 87% of males agreed they would be more likely to purchase a membership if it enabled them to play a variety of courses, whereas 76% of women agreed.

These statistics clearly give rise to a rationale that males will be more receptive to a “regional membership.” It is also reasonable to conclude that males may perceive greater benefits in club membership when asked to reflect on their current playing behaviour in relation to membership efficiencies.

#### *Females are more intimidated and restricted by a perceived lack of skills/newness to the game than males*

Twice as many females (27%) than males (13%) cited a newness to the game or a feeling of intimidation based on their lack of developed golfing skills as their greatest barrier to acquiring a membership. In addition the comprehensive survey revealed that 88% of females felt that gaining

coaching facilities would make them more likely to purchase a membership, compared to 71% of males.

Anecdotal evidence from face to face surveying showed that generally females verbalised more concern than males about their golfing ability relative to member golfers and elicited greater willingness to commit to improving through coaching than males.

This suggests that females may respond more favourably than males in terms of membership uptake using initiatives which promote a faster induction to golf, as well as memberships which provide better access to coaching and mentoring.

***Time is a more significant barrier to committing to membership for males than females***

The short survey revealed that more males (44%) reported time as their biggest barrier to membership than females (28%). The comprehensive phone survey also backed this up, with more females (62%) than males (53%) stating they have enough available time to play golf once a week.

Therefore any initiatives or strategies that aim to address the issue of time scarcity and promote increased flexibility of the game should be aimed at males in the first instance.

***Despite having more time, females play more 9-hole golf and are more attracted to 9-hole memberships than males***

43% of females report to usually playing 9-hole golf, compared to 28% of males. In addition, 62% of female golfers agree that options on 9-hole memberships would make them more likely to commit to membership, compared to only 38% of men.

This perhaps highlights some issues regarding the perceptions of 9-hole golf as an acceptable form of the game for males. These findings also suggest the effectiveness of 9-hole golf in addressing issues of time scarcity for male golfers, as less females report time constraints than males.

***Males and females have different playing preferences***

More males (52%) prefer to play golf on weekends than females (39%), however more females (33%) prefer to play on weekdays than males (16%). 30% of males and only 9% of women prefer to play golf in the early morning.

**6.2 Other demographic differences – casual golfers**

***Older casual golfers play more golf than their younger counterparts and golf gains popularity with age***

Over a quarter (27%) of casual golfers aged over 45 play golf every two weeks, compared to 19% of those under the age of 45. A quarter (24%) of casual golfers aged over 65 play more than 40 games per year, significantly higher than the across all ages average of 11%.

This follows the general perception of golf as a game where participation increases with age. This is reiterated by the fact that 37% of casual golfers under the age of 25 report golf as their favourite sport; compared to 50% aged between 25- 44 and 54% aged over 45.

***Older casual golfers are more willing to pay higher green fees***

8% of older casual golfers (45 years+) pay on average more than \$40 for a game of golf, compared to 4% of those aged between 25-44.

This perhaps suggest that older golfers are more discerning in their choice of club facilities and course quality, where increased price is reflected in increased quality perceptions.

***Whilst mature casual golfers are prepared to pay more for green fees, they cite high membership costs as a greater barrier to membership more often than other age groups***

Golfers aged 45-54 are willing to pay more (\$26) for a game of golf than other age groupings, however they are also more likely to report price (25%) as their greatest barrier to memberships than other age groupings.

This perhaps highlights an opportunity to re-educate and inform mature golfers who play often of the potential cost effectiveness of club memberships in relation to frequency of play.

***Younger casual golfers are more active and play more sports than older casual golfers***

78% of those under the age of 25 play 1 or more sports; compared to 64% aged between 25-44 and 63% aged over 45.

It is therefore reasonable to conclude that golf has greater competition from other codes for the younger age groupings.

***Blue collar/ trade workers have marginally higher membership participation rates across other sport/ leisure facilities***

41% of blue collar/ trades workers hold current sporting/ recreation memberships compared to the average across all occupations of 36%. Trades/ blue collar workers therefore represent the best grouping to communicate the benefits of a con-joint membership initiative.

### 6.3 Value perceptions – casual golfers

***Time is the greatest barrier to membership across all age groups:***

Time is the leading barrier to membership across all age groups and is most heavily reported among 35-54 year olds.

This statistic supports any initiative that addresses time scarcity as being effective across all golfing age demographics.

***The barrier of time is as prevalent in rural areas as well as urban centers***

45% of rural South Island golfers reported time as their greatest barrier to membership, compared to 38% of casual golfers from the Auckland region.

This suggests that our societal notion of “time-poor urban dwellers” and “laid-back rural lifestylers” is a poor indicator for predicting the availability of leisure and recreational time across golfing demographics and geographies. It is therefore false to assume that time reducing initiatives will be more popular in urban centers than rural areas.

***Casual golfers are, drawn to and continue to play golf, for social reasons***

The large majority (83%) of all casual golfers are introduced to the game by their family or social network. Following on from this, the most popular response from casual golfers as to why they continue to play golf is for social reasons (39%).

Clearly this provides strong direction and focus for the future promotion of golf, where clubs can leverage the social side of the game concurrent to the competitive elements.

***Older casual golfers are only slightly less socially inclined than younger golfers***

64% of golfers aged over 45 agreed they would play more golf if more of their friends played, compared to 71% of those aged below 25 and 71% between 25-44.

55% of golfers aged over 45 agreed they would be more likely to purchase a membership if a friend joined at the same time, compared to 66% of those aged between 25-44 and 67% of those aged below 25.

This suggests that the value of membership incentives that include a social dimension would have reasonable relevance across all groupings e.g. “discounts for friends”.

***Golfers who are members of gyms are more likely to value the bundling of membership benefits across facilities than members of other sporting or recreational facilities***

84% of casual golfers with current gym memberships agreed that discounts across their gym and golf facilities would increase their likelihood to purchase a golf club membership, compared to only 66% of those that hold current memberships at other sporting facilities e.g. squash club.

This presents an opportunity for golf club memberships to be more effectively bundled with gym/ fitness facilities than any other sporting or recreational facility.

***Region does not affect perception of golfing affordability***

57% of urban golfers and 58% of rural based golfers agree they would play more golf if the game was cheaper.

This suggests that there is no major disparity between urban and rural golfers concerning the priority of golf in relation to disposable income.

***Young golfers are not negatively influenced by perceptions of rigid golfing rules, playing restrictions and club policies***

0% of golfers aged under 19, and 1% aged 20-24 report their biggest barrier to membership was that golf and golf clubs have too many rules or playing restrictions.

These findings suggest that reducing the traditional or regulatory environment of golf and golf clubs may have little or no effect on increasing memberships of existing golfers within younger demographics.

***Perceptions of golf clubs could be inhibiting membership uptake***

50% of golfers that are new to the game (played for less than 2 years) report they would be more likely to purchase a membership if golf clubs were more welcoming. This figure drops to 36% for those who have been playing for more than 2 years.

This suggests that initial perceptions of golf clubs are not favourable to quick membership uplift and commitment to the game. Whilst the statistics show that the degree of this influence may lessen with increased exposure to the club environment, it clearly shows that clubs may need to make more of an effort in positively inducting and dealing with new visitors to the club.

***Coaching is equally valued from novice to experienced golfers***

74% of all casual golfers agree they would be more likely to purchase a membership if coaching was offered as part of the package, compared to 73% of capable golfers (who usually score below 90) and 75% of experienced golfers (who have playing in excess of 15 years).

Bundling access to coaching or mentoring as part of club memberships will clearly be effective in appealing to golfers of all abilities.

***Family-friendly facilities and a greater family orientation within golf clubs is only mildly attractive to casual golfers***

Family friendly facilities (i.e. crèche, children play facilities) and a more family orientation within golf clubs was valued higher within the 35-44 age group yet overall these determinants were valued quite low by casual golfers across all ages.

This would appear to have some relationship with golf for “social reasons” rather than any other motivator, as golfers clearly value the ability to enlist friends and enjoy the social aspects of golf. In fact, it may be fair to assume that making clubs more “family-friendly” could have a detrimental effect on the perception of golf as a social sport, an activity for friends that is separate from wider family involvement.

***Additional on-site facilities are only moderately valued by casual golfers***

Fewer casual golfers (54%) agree that offering additional on-site facilities would increase their likelihood of joining a golf club than if the membership offered discounted access to additional off-site sporting clubs and facilities (71%).

Anecdotal evidence from focus groups and face to face surveying indicates that casual golfers see golf courses as places to play golf only. There appears to be little expectation that golf clubs should, or be able to, offer additional facilities.

Capital expenditure in new club facilities should be carefully assessed in terms of an ability to attract golfers. To avoid duplication of facilities, it may be more efficient for golf clubs to invest time and resource in developing strategic alliances with other off-site facilities.

## 6.4 Member golfers

***Both males and females play a similar amount of different courses each year however golfers on lower handicaps play more different courses than higher handicapped golfers***

67% of golfers with handicaps below 10 have played more than 7 different courses in 12 months, compared to 51% of 11-24 handicappers and 28% of those on 25+ handicaps.

This suggests that the perceived value of a regional membership may correlate with member golfer ability. Offering this increased flexibility for members will have a positive effect on retention of golfers of higher ability.

***Females and older members value social benefits most***

More females (47%) than males (30%) value social benefits as their greatest single membership benefit. Similarly 47% of members over the age of 45 value social benefits as their greatest single membership benefit, compared to 13% of members under the age of 45.

New social initiatives may be most effective in retaining memberships within these demographics.

***Both younger members and players on lower handicaps value competition more than older members and those with higher handicaps***

22% of members under the age of 45 value 'playing competitively' as their greatest membership benefit, compared to only 9% of members over the age of 45.

Lowest handicappers ( $\leq 5$ ) value 'playing competitively' as their greatest membership benefit. However golfers of all other abilities value social benefits as the greatest membership benefit.

***Member golfers play more different golf courses than casual players***

When comparing casual golfers and members that play golf once a week, only 29% of casual golfers play more than 7 different courses during the year, while 45% of members play more than 7 different courses within the same period.

This is contrary to the general assumption that casual players remain unaffiliated to enjoy the flexibility of playing many different courses, and that membership is a perceived constraint. This statistic clearly demonstrates that members are more active in seeking out different courses than casuals.

## 6.5 Focus groups

General conclusions from the focus groups can be summarised as follows:

- Key attractions to the sport include: social aspects; competition; the desire to improve a skill; and the physical and mental challenge that golf provides.
- Golf appeals to those with strong competitive instincts (untested in women)
- Golfers are likely to concurrently participate in other sports or have played other sports in the recent past
- From the perspective of a casual golfer - the greater the financial commitment in the game (i.e. through equipment), the higher the priority that golf is afforded and the greater the time commitment to learn and improve in the sport
- Casual 'green fee' players view that having a choice of courses is a clear benefit over being a member who is limited to one club
- Casual golfers seek flexibility and value for money in memberships. They do not see added value (and therefore justification for increased cost) from the existing portfolio of membership benefits (i.e. social inclusion, gain handicap, opportunity to play competitively etc)
- The biggest barrier to membership for casual golfers is their lack of available time and the subsequent perception that memberships will not be cost effective. i.e. they believe they have insufficient time to make the financial commitment worthwhile

From the case study where participants 'designed their own membership,' casual golfers agreed on a membership that contained the following benefits:

- Opportunities to play a range of courses in the area while still retaining a 'home club'
- Discounted or complimentary golf lessons
- Pay per round efficiency retained – for example a “20% annual fee membership outlay, then a reduced green-fee for each game played”

## 6.6 Recommended Future Research

### *Targeted Qualitative Research on Women Casual Golfers*

Quantitative research from this study indicates distinct differences between men and women casual golfers. Anecdotal evidence indicates that women differ from men in that they:

- Are less motivated by the competitive nature of golf
- Are less likely to come from a background of sport participation
- Are more likely to seek lessons to actively improve for personal reasons
- Are more likely to play 9-hole golf

Most significantly, women indicated a greater interest in golf from the social perspective. Therefore it would be valuable to conduct further qualitative research (focus groups) with women to better investigate the social potential of golf and club memberships.

### *Research into Local Campaigns, Recruitment and Conversion Techniques*

The research process highlighted a range of attitudes and approaches towards casual players at local club management levels. At a basic level the researcher was able to gauge a club's fundamental commitment and willingness to attract and convert casual golfers. It can be concluded that the vast majority of clubs demonstrate a real commitment to catering for casual golfers, however there are significant differences in the focus and techniques to convert casual players to members. Prior to devising and implementing a national recruitment programme, further research in the following areas may be useful:

- What marketing and management strategies and techniques are individual golf clubs currently implementing to grow and retain their membership base?
- What methods and approaches are currently used to engage with casual golfers?
- How effective have these methods been to date in converting casuals to members?
- What level of resource are individual clubs currently investing in increasing their membership base?
- How receptive are individual clubs to engage in regional and national membership strategies?

**CASUAL (NON MEMBERS) GOLFERS NATIONWIDE SURVEY**

**Fill out this questionnaire to be in to win a prize pack from 3 UNDER worth over \$1000  
Participants may go on to be in to win a further \$1200 Titleist Prize (see below)**

1.	Are you currently a member of a New Zealand golf club?    Yes    No	2.	How long have you been playing golf?.....	3.	Please state your gender: Male    Female
4.	Please state your current occupation: .....		5.	Please state the town/ city that you live in (or nearest): .....	
6.	Please state your age range?				
	15 - 19yrs	20 - 24 yrs	25 - 34 yrs	35 - 44 yrs	45 - 54 yrs    55 - 64 yrs    65 +yrs
7.	How many times have you played golf at a NZ course (not including at driving ranges) in the past 12 months?				
	< 3	4 - 8	9 - 13	14 -18	19 - 23    24 - 28    29 - 35    36 - 40    40 +
8.	How many different golf courses have you played in the last 12 months?				
	1 - 3	4 - 6	7 - 9	10 - 12	13 - 15    16 - 18    19 - 21    22 - 24    25 +
9.	On average, how much do you spend on casual green fees for a game of golf?				
	less than \$10	\$10 -\$20	\$21- \$30	\$31- \$40	\$41 - \$55    \$56 +
10.	Have you been a member of a New Zealand golf club in the past ?    Yes    No				
	If so, which New Zealand golf club? .....				
11.	From the list below, please state the main reason why you are <u>not</u> currently a member of a New Zealand golf club (select a statement that best reflects your attitude to golf memberships):				
	<p>I don't have enough time to have a membership</p> <p>I prefer the flexibility of playing different golf courses</p> <p>Memberships are too expensive</p> <p>I don't enjoy golf enough</p> <p>I prefer the driving range</p> <p>There is a lack of quality courses in my area</p> <p>Golf clubs have too many rules and regulations (i.e. dress code)</p> <p>Golf clubs don't provide enough flexibility for playing times</p> <p>Other reason (please state) .....</p>				

Thank you for taking the time completing this survey. To be in to win the 3 Under prize pack worth \$1000, please give your name and best contact below:

Name:..... Contact phone no.:.....

**BE IN TO WIN A FURTHER PRIZE FROM TITLEIST VALUED AT \$1200...**

if you are agree to be contacted for a further 5-min study for New Zealand Golf

Yes please contact me at the number given above, I am willing to answer further questions.

**AFFILIATED GOLFERS (MEMBERS) NATIONWIDE SURVEY**

**Fill out this questionnaire to be in to win a prize pack from 3 UNDER worth over \$1000  
Participants may go on to be in to win a further \$1200 Titleist Prize (see below)**

1.	Are you currently a member of a New Zealand golf club? YES NO	2.	How long have you been playing golf?.....	3.	Please state your gender: Male Female
4.	Please state your current occupation: .....		5.	Please state the town/ city that you live in (or nearest to):.....	
6.	Please list all of the different NZ Golf Clubs you have been a member of since you started playing golf? .....				
7.	Please state your golfing ability (current handicap): 5 or lower 6-10 11-17 18-24 25-31 32 +				
8.	Please state your age range? <14yrs 15 - 19yrs 20 - 24 yrs 25 - 34 yrs 35 - 44 yrs 45 - 54 yrs 55 - 64 yrs 65 +yrs				
9.	How often are you currently playing golf? Less than every 2 months Monthly Twice a month Weekly Twice a week More than twice a week				
10.	How many different golf courses have you played on in the past 12 months? 1 - 3 4 - 6 7 - 9 10 - 12 13 - 15 16 - 18 19 - 21 22 - 24 25 +				
11.	On average, how much do you pay for affiliated green fees? Less than \$10 \$10 - \$20 \$21- \$30 \$31- \$40 \$41 - \$55 \$56 +				
12.	Your current membership type? Full playing Life Midweek Summer Junior 9-hole Other (specify) .....				
13.	What is the main benefit of your current golf membership? (Select 1 statement that best reflects your attitude) Cost effective/ cheaper than paying green fees each time The social aspect of the club environment Course/ club facilities (i.e. standard of course, clubhouse etc) Ability to get a handicap Ability to play competitively (i.e. internal and inter-club competitions) Ability to secure optimum tee times Other benefit (please specify).....				

Thank you for taking the time completing this survey. To be in to win the 3 Under prize pack worth \$1000, please give your name and best contact below:

Name:..... Contact phone no.:.....

## INTERNAL COMPREHENSIVE PHONE SURVEY FORM - CASUALS

**Name:**

**Database No:**

**Phone Number:**

- 1) What was the main reason you started playing golf? (*choose one only, do not read out, use to code*)

For a new physical, sport or leisure activity   
For social reasons   
For work reasons   
It appealed to me as a sport   
Other (include) \_\_\_\_\_

- 2) How were you first introduced to the game of golf? (*choose one only, do not read out, use to code*)

Through a spouse or partner   
Through a family member   
Through a friend or social network   
Through work or work colleague   
Started independently   
Other(state) \_\_\_\_\_

- 3) When you play golf, do you usually (*read out list of options*):

Usually Play 18 holes   
Usually Play 9 holes   
Usually use the driving range

- 4) Do you prefer to play golf on: (*tick all that apply – read out*)

Weekdays   
Weekends   
Public holidays   
While on holiday

- 5) How much golf can you play based on your free time? (*choose one only, do not read out, use to code*)

Less than once a month   
Monthly   
Fortnightly

- Weekly
- Twice Weekly
- More than twice weekly

6) What time of the day do you usually play golf? (*choose one only, do not read out, use to code*)

- 6-9am
- 9-12
- 12-3pm
- 3pm & after
- Anytime

7) Do you play golf in (*read out both, choose one of the two*)

- Fine Weather Only
- All weather conditions

8) What time of year do you play most of your golf? (*open question, code response*)

- Summer
- Winter
- Holiday period
- All year round

9) (*tick one only*)

On average what do you score for 18 holes?

- In the 70's
- In the 80's
- In the 90's
- Between 100 –120
- Over 120
- I do not keep score

10) What other sports/ recreational activities do you **currently** participate in other than golf? (*list*)

- 1.  2.  3.
- 4.  5.  6.

11) Are you a current member of any club/ recreational facility? (i.e. rugby club, gym)

- Yes – which one
- No

Strongly Agree      Agree      Neutral      Disagree      Strongly Disagree

(1)	(2)	(3)	(4)	(5)
Golf is my favourite sport/ recreational activity.				
		<b>1</b>	<b>2</b>	<b>3</b>
		<b>4</b>	<b>5</b>	
<b>12) I play golf...</b>				
a) For physical/ health reasons		<b>1</b>	<b>2</b>	<b>3</b>
		<b>4</b>	<b>5</b>	
b) For social reasons		<b>1</b>	<b>2</b>	<b>3</b>
		<b>4</b>	<b>5</b>	
c) For the personal challenge		<b>1</b>	<b>2</b>	<b>3</b>
		<b>4</b>	<b>5</b>	
d) For stress relief/ relaxation		<b>1</b>	<b>2</b>	<b>3</b>
		<b>4</b>	<b>5</b>	
e) For competition		<b>1</b>	<b>2</b>	<b>3</b>
		<b>4</b>	<b>5</b>	
<b>13) I would play golf more often...</b>				
a) If more of my family played		<b>1</b>	<b>2</b>	<b>3</b>
		<b>4</b>	<b>5</b>	
b) If more of my friends played		<b>1</b>	<b>2</b>	<b>3</b>
		<b>4</b>	<b>5</b>	
c) If I had more time		<b>1</b>	<b>2</b>	<b>3</b>
		<b>4</b>	<b>5</b>	
d) If the game was shorter		<b>1</b>	<b>2</b>	<b>3</b>
		<b>4</b>	<b>5</b>	
e) If I was a better golfer		<b>1</b>	<b>2</b>	<b>3</b>
		<b>4</b>	<b>5</b>	
f) If golf was more affordable		<b>1</b>	<b>2</b>	<b>3</b>
		<b>4</b>	<b>5</b>	
g) If I enjoyed golf more		<b>1</b>	<b>2</b>	<b>3</b>
		<b>4</b>	<b>5</b>	
<b>14) I would be more likely to purchase a membership of a golf club if:</b>				
a) If a family member joined at the same time		<b>1</b>	<b>2</b>	<b>3</b>
		<b>4</b>	<b>5</b>	
b) If a friend joined at the same time		<b>1</b>	<b>2</b>	<b>3</b>
		<b>4</b>	<b>5</b>	
c) If golf clubs were more social		<b>1</b>	<b>2</b>	<b>3</b>
		<b>4</b>	<b>5</b>	
d) If golf clubs were more family oriented		<b>1</b>	<b>2</b>	<b>3</b>
		<b>4</b>	<b>5</b>	

e) If membership packages provided coaching and facilities to help me improve

1 2 3 4 5

f) If membership packages provided discounted access to/partnership with other facilities/  
sports clubs (i.e. cheap rates at the gym etc)

1 2 3 4 5

g) If there was more flexibility around paying for the membership (i.e. not have to pay lump  
sum)

1 2 3 4 5

h) If memberships were more affordable per game of golf played

1 2 3 4 5

i) If a membership package included a range of golf clubs in my area

1 2 3 4 5

j) If golf clubs offered family friendly facilities

1 2 3 4 5

k) If golf clubs offered additional recreational facilities (e.g. bbq, tennis court, swimming  
pools)

1 2 3 4 5

l) If golf clubs were more welcoming

1 2 3 4 5

m) If I was a better player

1 2 3 4 5

n) If I could have guaranteed access to the golf club at the times that suit me

1 2 3 4 5

o) If I could join as a nine hole member

1 2 3 4 5

**Advise them just a couple of questions to go.**

15) I have a good understanding of the benefits of a membership

**Yes No Some understanding**

16) I understand the handicapping system

**Yes No Some understanding**

17) I understand the rules of golf

**Yes**                      **No**                      **Some understanding**

18) I want to play more golf than I do currently

**Yes**                      **No**                      **Unsure**

19) In the next 5 years I will play more golf than I do currently

**Yes**                      **No**                      **Unsure**

20) I plan on gaining a golf membership in the future

**Yes**                      **No**                      **Unsure**

21) I have made enquires into a golf membership in the past

**Yes**                      **No**

22) How would you go about selecting a suitable golf club? (list options and select 1 only)

Would you?

- Search the internet
- Word of mouth/ personal referral
- Sampling (playing the course first)
- Other?

**NZ Golf Research – Casual Players & Future Memberships**

Group 2: Wednesday 12 March 2008, 6.30 – 8.00

**Case Study (to be given to participants)**

You are a casual golfer and you are now considering purchasing a golf club membership for the next year.

You work full-time Monday to Friday, 9am – 5 pm. You live in an urban area.

You enjoy golf, but it's not the only sport you play or support.

You consider yourself an average golfer but are pretty sure that you will get better the more games you play.

A golf club in your area is offering a design-your-own membership deal.

You usually pay \$25 per casual game of golf at the same golf club. This membership will be more cost effective than paying the green fees as a casual golfer.

You go along to the club to check things out.....

## Design-Your-Own- Membership @ Your Ultimate Golf Club

### Step 1 – Frequency

**How many games of golf do you estimate you will play in a 12 month period with this membership?**

..... no. of games of golf per year

The golf club is within optimum traveling distance for you. **How far from home are you prepared to travel to get to this golf course?**

.....km's/ mins

The membership will give you guaranteed access to tee times. **When are you likely to want to use your membership most?**

.....  
Days of week, times, holidays (public/annual), seasons etc

### Step 2 - Value

Please indicate which benefits you value (i.e. are prepared to pay for) as part of the membership package:

- |  |       |
|--|-------|
| Choice between a 9-hole or 18-hole membership                              | Y / N |
| Choice between a seasonal or year-round membership                         | Y / N |
| Choice between a concession card type membership or full paying membership | Y / N |
| Discounted new memberships for your friends                                | Y / N |
| Discounted casual fees for your friends when playing with you              | Y / N |
| Discounted new memberships for your family                                 | Y / N |
| Discounted casual fees for your family when playing with you               | Y / N |
| Access to discounted pro-shop goods for purchase                           | Y / N |
| Access to complimentary equipment hire                                     |       |

Y / N

Access to social facilities at the club, including bar, restaurant, organised events and tournaments Y / N

Access to the course on your preferred days of the week Y / N

Access to the course on your preferred public holidays Y / N

Access to tee times of your choice

Y / N

Access to additional sports facilities at the club e.g. spa, sauna, tennis court, gym

Y / N

Access to flexi-payment of your membership

Y / N

Access to childcare facilities

Y / N

Access to tee times and facilities at other aligned golf clubs in your area

Y / N

Complimentary lessons with your new membership Y / N

Complimentary pairing/ grouping/ introduction with players of similar ability

Y / N

### Step 3 – Confirming your membership

What is your preferred method of confirming your membership with the club?

- In person at the club
- Via phone
- Via email or website

How would you like to be able to pay for your membership?

- Full payment up front at the club
- Full payment up front via Internet Banking or Credit Card
- Flexible AP or direct debit
  - Weekly
  - Monthly

Quarterly

**Step 3 – Price**

What are you prepared to pay for a membership containing all of your above benefits?

..... (total cost of membership for 12 months)

### Key Statistics – Casual Golfers and Members

- 75% of members are male, 25% are female
- 89% of casual golfers are male, 11% are female
- 60% of members are over the age of 55, compared to 12% of casual golfers
- 53% of casual golfers are aged between 25-44, 15% of members are aged between 25-44
- 38% of casual golfers are professionals, the largest occupation grouping
- 31% of members value social benefits above all other benefits of their current memberships
- 42% of casual golfers report their greatest barrier to membership acquisition was time, 26% report membership costs as their greatest barrier
- On average casual golfers spend \$23 for a game of golf, members spend on average \$22 for affiliated green fees
- On average, casual golfer play 8 games of golf each year, 23% play every fortnight, 11% play more than 40 games each year.
- One in 5, 19% of casual golfers have had previous membership experience
- Over half, 58% of casual golfers play fewer than 4 different courses each year, 13% play more than 7 different courses each year
- Half, 50% of casual golfers report that golf is their favourite sport or leisure activity
- 87% of casual golfers agreed they would play more golf if they had more time although 21% reported they would play more if the game was shorter
- 86% of casual golfers agreed they would be more likely to purchase a membership if it allowed them to play a variety of different courses
- Friends have a stronger influence on potential membership acquisition than family: 65% of casual golfers agreed they would be more likely to purchase a membership if a friend joined whereas only 39% reported they would be more likely to purchase a membership if a family member did also
- 75% of casual golfers agreed they would be more likely to purchase a membership where the price was determined by the amount of golf they played within a specified time period.
- Two thirds, 65% of casual golfers reported they would be more likely to purchase a membership if there was more flexibility around paying for the membership
- 74% of casual golfers agreed they would be more likely to purchase a membership if coaching was offered as part of the package.
- Almost all, 88% casual golfers want to play more golf than they do currently
- A third, 66% of casual golfers report they plan on gaining a membership in the future