



GMA Presentation

Stephen Pitt

CEO

Golf Australia

Golf Australia



Operating Philosophy

- Reduced administration costs
- Money into programs
- Grass roots focused
- Positively impacting on the health of Golf & Golf Clubs

Connecting with the Social Golfer



Golden Rule

Golf Australia can not and will not undertake any program that negatively impacts on the health of Australian Golf Clubs.

Connecting with the Social Golfer



Golf is well placed

- Better placed than other sports
- More participants 700K – 750K
- More to offer

Connecting with the Social Golfer



WHY?

- More frequent play
- Appropriate Player Insurance
- Transition to club membership
- Balanced contribution to golf development
- Greater understanding and influence

Connecting with the Social Golfer



Possible offerings to social players:

- Events
- Handicap
- Insurance
- Information
- Discounts
- Privileges

The NZ Case Study



Golf Australia

- NZ Club Golf
- 400 clubs
- 130K club members
- 370K casual golfers
- 70% male and 30% female
- 6% Juniors
- Average age = 60

NZ Casual Golfer Research



Golf Australia

- NZ Casual Golfer
- 89% male and 11% female
- 38% professional people
- 53% aged 25 - 44
- 42% - time is the barrier to membership
- 26% - cost is the barrier to membership

NZ Casual Golfer Research



Golf Australia

- Incentives to join a club
- 86% - variety of courses
- 75% - fees linked to playing
- 65% - flexible payment options
- 65% - join with a friend
- 74% - coaching included
- 87% - play more with more time
- 66% - planned on getting a membership

What NZ Golf Did



Golf Australia

- Golf Club Nation
- Ensured extra value in club membership
- Standardised offering across 100 participating clubs
 - Spread payment options
 - 9 hole memberships
 - Joining offers – coaching, with a friend, family
 - Starter tee blocks
 - Access to other courses

NZ Membership



Golf Australia

- 2004 – 129K
- 2005 – 127K
- 2006 – 124K
- 2007 – 123K
- **2008 – 130K**

Australian Research



- First batch of social golfer research completed
- Jeff Blunden & Martin Hiron
- 1238 on-line respondents
- Designed to provide a greater understanding of:
 - How we could connect with social golfers
 - Social golfers and club membership
- There is more research to come

Social Golfer Participation



How do you participate in golf at the moment

	Frequency	Percent	Valid Percent	Cumulative Percent
Organised social group	130	10.5	10.5	10.5
Casual player	1108	89.5	89.5	100.0
Total	1238	100.0	100.0	

GENDER



What is your gender

	Frequency	Percent	Valid Percent	Cumulative Percent
Male	868	70.1	70.1	70.1
Female	370	29.9	29.9	100.0
Total	1238	100.0	100.0	

How long?



How long have you been playing golf

	Frequency	Percent	Valid Percent	Cumulative Percent
Less than one year	95	7.7	7.7	7.7
1-4 years	377	30.5	30.5	38.1
5-9 years	243	19.6	19.6	57.8
10-19 years	283	22.9	22.9	80.6
20 years or more	240	19.4	19.4	100.0
Total	1238	100.0	100.0	

Geographic Breakdown



Golf Australia

Which State or Territory do you live in

	Frequency	Percent	Valid Percent	Cumulative Percent
ACT	32	2.6	2.6	2.6
NT	2	.2	.2	2.7
NSW	466	37.6	37.6	40.4
QLD	225	18.2	18.2	58.6
SA	63	5.1	5.1	63.7
TAS	12	1.0	1.0	64.6
VIC	324	26.2	26.2	90.8
WA	114	9.2	9.2	100.0
Total	1238	100.0	100.0	

Geographic Breakdown



In which part of this State or Territory do you live

	Frequency	Percent	Valid Percent	Cumulative Percent
Country region	274	22.1	22.1	22.1
Metropolitan region	964	77.9	77.9	100.0
Total	1238	100.0	100.0	

AGE



Into which of the following age brackets do you fall

	Frequency	Percent	Valid Percent	Cumulative Percent
Under 15 years	92	7.4	7.4	7.4
15-19 years	97	7.8	7.8	15.3
20-24 years	148	12.0	12.0	27.2
25-34 years	365	29.5	29.5	56.7
35-44 years	207	16.7	16.7	73.4
45-54 years	195	15.8	15.8	89.2
55-64 years	111	9.0	9.0	98.1
65 plus	23	1.9	1.9	100.0
Total	1238	100.0	100.0	

How did you start?



Who introduced you to golf

	Responses		Percent of Cases
	N	Percent	
Parent	432	28.8%	34.9%
Sibling	76	5.1%	6.1%
Spouse / partner	148	9.9%	12.0%
Other Family / Relative	178	11.9%	14.4%
Personal friend / acquaintance	419	27.9%	33.8%
Work colleague	115	7.7%	9.3%
Started independently	103	6.9%	8.3%
Other please specify	29	1.9%	2.3%
	1500	100.0%	121.2%

Why do you play?



Golf Australia

What are the main reasons why you play golf

			Percent of Cases
	N	Percent	
Social experience e.g. time with friends	998	23.8%	80.6%
Health benefits	442	10.5%	35.7%
Relaxation	702	16.8%	56.7%
Personal challenge of the sport	637	15.2%	51.5%
Playing great courses	348	8.3%	28.1%
Competing against my playing partners including betting	241	5.8%	19.5%
Playing in formal competitions	68	1.6%	5.5%
Increasing business opportunities	90	2.1%	7.3%
The feeling and satisfaction I get when I hit a good shot	635	15.2%	51.3%
Other	30	.7%	2.4%
	4191	100.0%	338.5%

Membership



Have you previously been a member of a club

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	314	25.4	25.4	25.4
No	924	74.6	74.6	100.0
Total	1238	100.0	100.0	

Membership



Golf Australia

Main reasons gave up club membership

	Responses		Percent of Cases
	N	Percent	
Time constraints personal	133	17.0%	42.4%
Work commitments	94	12.0%	29.9%
Family commitments	64	8.2%	20.4%
I wasn't playing enough	119	15.2%	37.9%
Lack of value in the membership offering	54	6.9%	17.2%
Fees becoming too high	95	12.1%	30.3%
Declining course quality	15	1.9%	4.8%
General club dissatisfaction	16	2.0%	5.1%
Health related reasons	18	2.3%	5.7%
Age related reasons	8	1.0%	2.5%
Change in residential location	129	16.5%	41.1%
I am in between clubs and in the process of rejoining	17	2.2%	5.4%
Other	20	2.6%	6.4%
Total	782	100.0%	249.0%

Membership



Do you plan to join a golf club in the next 3 years

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	385	31.1	31.1	31.1
No	279	22.5	22.5	53.6
Don't know	574	46.4	46.4	100.0
Total	1238	100.0	100.0	

Membership



Family membership option partner and children

	Frequency	Percent	Valid Percent	Cumulative Percent
Certain to join	79	6.4	6.4	6.4
Very likely to join	190	15.3	15.3	21.7
Fairly likely to join	330	26.7	26.7	48.4
Fairly unlikely to join	197	15.9	15.9	64.3
Very unlikely to join	171	13.8	13.8	78.1
Certain not to join	99	8.0	8.0	86.1
Don't know	172	13.9	13.9	100.0
Total	1238	100.0	100.0	

Membership Options



Join with a friend promotion

	Frequency	Percent	Valid Percent	Cumulative Percent
Certain to join	61	4.9	4.9	4.9
Very likely to join	281	22.7	22.7	27.6
Fairly likely to join	458	37.0	37.0	64.6
Fairly unlikely to join	183	14.8	14.8	79.4
Very unlikely to join	84	6.8	6.8	86.2
Certain not to join	40	3.2	3.2	89.4
Dont know	131	10.6	10.6	100.0
Total	1238	100.0	100.0	

Membership Options



A membership that included a series of lessons

	Frequency	Percent	Valid Percent	Cumulative Percent
Certain to join	132	10.7	10.7	10.7
Very likely to join	321	25.9	25.9	36.6
Fairly likely to join	477	38.5	38.5	75.1
Fairly unlikely to join	137	11.1	11.1	86.2
Very unlikely to join	74	6.0	6.0	92.2
Certain not to join	21	1.7	1.7	93.9
Dont know	76	6.1	6.1	100.0
Total	1238	100.0	100.0	

Membership Options



A membership that included access to other courses at discounted green fee rates

	Frequency	Percent	Valid Percent	Cumulative Percent
Certain to join	109	8.8	8.8	8.8
Very likely to join	384	31.0	31.0	39.8
Fairly likely to join	478	38.6	38.6	78.4
Fairly unlikely to join	121	9.8	9.8	88.2
Very unlikely to join	46	3.7	3.7	91.9
Certain not to join	23	1.9	1.9	93.8
Dont know	77	6.2	6.2	100.0
Total	1238	100.0	100.0	

Membership Options



A membership where the value was based on the amount of golf played

	Frequency	Percent	Valid Percent	Cumulative Percent
Certain to join	107	8.6	8.6	8.6
Very likely to join	279	22.5	22.5	31.2
Fairly likely to join	409	33.0	33.0	64.2
Fairly unlikely to join	192	15.5	15.5	79.7
Very unlikely to join	92	7.4	7.4	87.2
Certain not to join	36	2.9	2.9	90.1
Dont know	123	9.9	9.9	100.0
Total	1238	100.0	100.0	

Membership Options



A membership option that just gave me an official handicap but didn't include rounds of golf

	Frequency	Percent	Valid Percent	Cumulative Percent
Certain to join	37	3.0	3.0	3.0
Very likely to join	127	10.3	10.3	13.2
Fairly likely to join	275	22.2	22.2	35.5
Fairly unlikely to join	289	23.3	23.3	58.8
Very unlikely to join	179	14.5	14.5	73.3
Certain not to join	109	8.8	8.8	82.1
Dont know	222	17.9	17.9	100.0
Total	1238	100.0	100.0	

Membership Options



Summary

	Certain	Very Likely	Likely	Cumulative
Lessons	10.7	25.9	38.5	75.1
Join with a friend	4.9	22.7	37	64.6
Family membership	6.4	15.3	26.7	48.4
Variety of courses	8.8	31	38.6	78.4
Play based membership	8.6	22.5	33	64.2
Handicap only	3	10.3	22.3	35.5
Total				

Membership Barriers



What has put you off club membership

	Responses		Percent of Cases
	N	Percent	
Golf clubs are not friendly/welcoming enough	192	4.9%	15.5%
Clubs are not family oriented	159	4.0%	12.8%
I do not have enough time to justify it	537	13.6%	43.4%
Club membership is too expensive (annual fees)	753	19.1%	60.8%
Club membership is too expensive (joining fees)	717	18.2%	57.9%
Not flexible enough around payment options	301	7.6%	24.3%
I do not play enough to justify	746	18.9%	60.3%
The clubs available aren't of a high enough quality	43	1.1%	3.5%
Not flexible enough with membership options	414	10.5%	33.4%
None of the above, I have not considered membership yet	56	1.4%	4.5%
Other	28	.7%	2.3%
	3946	100.0%	318.7%

What appeals to Social Golfers



Interest in obtaining an official Golf Australia handicap				
	Frequency	Percent	Valid Percent	Cumulative Percent
Extremely interested	134	10.8	10.8	10.8
Very interested	290	23.4	23.4	34.2
Fairly interested	379	30.6	30.6	64.9
Not very interested	300	24.2	24.2	89.1
Not at all interested	135	10.9	10.9	100.0
Total	1238	100.0	100.0	

What appeals to Social Golfers



Insurance for my golf clubs				
	Frequency	Percent	Valid Percent	Cumulative Percent
Extremely interested	51	4.1	4.1	4.1
Very interested	152	12.3	12.3	16.4
Fairly interested	308	24.9	24.9	41.3
Not very interested	485	39.2	39.2	80.5
Not at all interested	242	19.5	19.5	100.0
Total	1238	100.0	100.0	

What appeals to Social Golfers



Personal injury and liability insurance for myself and other golfers

	Frequency	Percent	Valid Percent	Cumulative Percent
Extremely interested	62	5.0	5.0	5.0
Very interested	173	14.0	14.0	19.0
Fairly interested	337	27.2	27.2	46.2
Not very interested	459	37.1	37.1	83.3
Not at all interested	207	16.7	16.7	100.0
Total	1238	100.0	100.0	

What appeals to Social Golfers



Golf equipment specials				
	Frequency	Percent	Valid Percent	Cumulative Percent
Extremely interested	151	12.2	12.2	12.2
Very interested	444	35.9	35.9	48.1
Fairly interested	423	34.2	34.2	82.2
Not very interested	150	12.1	12.1	94.3
Not at all interested	70	5.7	5.7	100.0
Total	1238	100.0	100.0	

What appeals to Social Golfers



Other purchasing benefits e.g. discounts at major retail chains

	Frequency	Percent	Valid Percent	Cumulative Percent
Extremely interested	156	12.6	12.6	12.6
Very interested	421	34.0	34.0	46.6
Fairly interested	421	34.0	34.0	80.6
Not very interested	160	12.9	12.9	93.5
Not at all interested	80	6.5	6.5	100.0
Total	1238	100.0	100.0	

Frequency of Play



How many times have you played golf in the past 12 months				
	Frequency	Percent	Valid Percent	Cumulative Percent
Not at all	60	4.8	4.8	4.8
Less than 3 times	264	21.3	21.3	26.2
3 to 6 times	393	31.7	31.7	57.9
7 to 12 times	284	22.9	22.9	80.9
13 to 26 times	165	13.3	13.3	94.2
27 to 52 times	63	5.1	5.1	99.3
53 to 104 times	5	.4	.4	99.7
More than 104 times	4	.3	.3	100.0
Total	1238	100.0	100.0	

Club Member Survey



- Research specific to club golfers
- Still being drafted
- Motivation behind membership
- Threats to membership
- Impact if handicap is available outside of membership

Club Member Research



GolfAustralia

**What are the main reason/s why you are a member of a golf club?
(select all that apply)**

- overall social experience
- member camaraderie as I have friends who are also members
- regular formal competitions
- being associated with being a member of a club
- playing on a good quality golf course
- better value for money than paying green fees
- having an official handicap
- accessibility to the services/facilities associated with a golf club (eg golf course availability, practice area, clubhouse facilities etc)
- increase my business opportunities
- other (please specify below)

Club Member Research



Golf Australia

In terms of your overall level of satisfaction with your membership at your golf club, how satisfied or dissatisfied would you say you are?

Club Member Research



Golf Australia

Assuming good health and physical ability, how likely are you to leave your club within the next two to three years?

Club Member Research



Golf Australia

Do you believe Golf Australia and other bodies should be doing more to encourage casual golfers to take up club membership?

Club Member Research



GolfAustralia

If Golf Australia introduced an official handicap for casual golfers (who are non members of golf clubs), how likely would you be to leave your club in the next 2-3 years?

Club Member Research



Golf Australia

**How many times have you played golf in the past
12 months?**

Club Member Research



GolfAustralia

Would you be interested in assisting us with further research such as focus groups in the next few weeks?

Summary



- The research we have undertaken is important
- It gives us confidence that we can:
 - Connect with social golfers
 - Transition them towards club membership
 - Ensure social golfer program help and strengthen clubs



Monthly Rounds Data Project