

2015 PARTICIPANT SURVEY

KEY FINDINGS

➔ OVERALL

- Majority of members and casual golfers were introduced through a family member or friend or social network (70%).
- 73% of all respondents reported that playing the game in less time wouldn't improve their enjoyment of the game with nearly 90% reporting to generally be happy with the time it takes to play. The large majority (62%) reported the average time it takes to play to be 4-4.5 hours which seems to be acceptable.
- Members are more likely to play other courses with 61% having played 5-10 courses in the past 12 months compared to casual golfers at only 34%. The majority of casual golfers have played between 1-4 courses (64%) compared to only 30% of members.
- 68% don't use a mobile phone on course, of those that do, only 9% is for golf purposes.
- Overall it is the lack of time people have that prevents them from playing more golf, yet they don't see the time it takes to play golf as a barrier to playing more. They wouldn't play more golf using shortened versions, they need to find more time to play the full version of the game.
- The majority of respondents report purchasing their golf equipment mostly from a pro shop at a golf club with the next being The Golf Warehouse.
- Just as many casual golfers and members were introduced to the game before 20 years of age as there were over 20 years of age.
- The spread of what age they were introduced is relatively even across all age brackets, with the 10-14 and 40+ topping the others slightly.

➔ MEMBERS

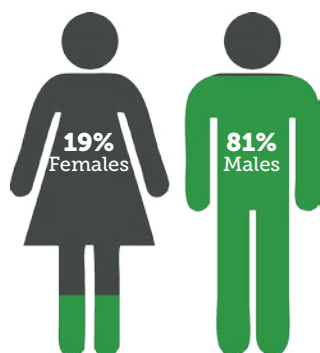
- 27% of our members have been a member for 20 years or longer.
- Only 16% of our members are relatively new, having been a member for two years or less.
- Whilst the majority of our members have been a member for six years or more (70%), the majority of them have been a member of their current club for less than six years (54%).
- 64% have been a member of just one or two clubs.
- 85% of members play 18 holes.
- Half our members prefer to play with the same people every time while the other half prefer to play with different people.
- The most important factor to our members for having a membership is because it is cost effective/cheaper than paying green fees.
- 88% of members rate other benefits of membership such as cost, social, course standard, club facilities and competitions as more important than getting a handicap.
- The least influential factor (and significantly so) to being a member is the ability to secure optimum tee times.
- The main factor that would result in members playing more golf is if they had more time. Interestingly they would not play more golf if the game was shorter. They are unlikely to play shortened versions of the game, they simply need time to play the full version. Other key influencing factors to encourage them to play more were if more of their family and friends played. The least influencing factors to them playing more golf are if the game was shorter, they were better at golf, golf was more affordable or they enjoyed it more.
- The most important reason for members playing golf was significantly for the personal challenge (41%). Physical/health reasons and social reasons followed at 19% and 18% respectively. Least important was for competition and stress relief/relaxation.

→ CASUAL GOLFERS

- 77% have previously been a member of a golf club so they are highly engaged casual golfers.
- The main influence why casual golfers aren't members of a golf club is membership is perceived to be too expensive. Other key factors are they don't have enough time to get value from a membership and they would like to play at different courses.
- Key influences that would persuade them to take up membership are if memberships were more affordable per round of golf played and if it allowed them to play a range of clubs in their area. Least influential are if a family member joined at the same time, if clubs were more family friendly and if clubs offered more family friendly facilities.
- 67% of casual golfers play less than once a month (10 times or less a year).

RESPONDENTS

2,407 Responses



49% Golf Club Members
51% Casual Golfers

Age of respondents:	
Under 19 years	3%
20 - 30 years	8%
31 - 45 years	26%
46 - 65 years	45%
66+ years	18%

MEMBERS

Age first introduced to golf:	
Under 5 years	2%
5 - 9 years	10%
10 - 14 years	22%
15 - 19 years	15%
20 - 29 years	15%
30 - 39 years	12%
40+ years	24%

How they were introduced:	
Through a spouse or partner	7%
Through a family member	43%
Through a friend or social network	26%
Through work or a work colleague	7%
Through School	3%
Started independently	14%

Years as a golf club member:	
Less than 1 year	7%
1 - 2 years	9%
3 - 5 years	14%
6 - 10 years	19%
11 - 15 years	15%
16 - 20 years	9%
Longer than 20 years	27%

Years as a member at current club:	
Less than 1 year	20%
1 - 2 years	14%
3 - 5 years	20%
6 - 10 years	16%
11 - 15 years	11%
16 - 20 years	8%
Longer than 20 years	11%

The amount of clubs they have been members of:	
1	34%
2	30%
3	15%
4	12%
5 or more	9%

Number of different golf clubs played in the last 12 months:	
0	4%
1 - 4	30%
5 - 9	40%
10 - 20	21%
21 - 30	4%
31+	1%

How many holes they usually play:	
9 holes	15%
18 holes	85%

Playing partners:	
Usually play with the same people	45%
Don't always play with the same people	55%

Number of different international golf clubs played in the last 12 months:	
0	57%
1 - 4	29%
5 - 9	8%
10 - 20	4%
21 - 30	1%
31+	1%

Ranking of importance of the member's current membership (1 being main benefit):						
	1	2	3	4	5	6
Cost effective / cheaper than paying green fees each time	33%	18%	14%	13%	12%	10%
The social aspect of the club environment	18%	23%	19%	17%	14%	9%
Course / club facilities (ie standard of course, clubhouse etc)	19%	21%	25%	18%	14%	3%
Ability to get a handicap	12%	17%	17%	20%	22%	12%
Ability to play competitively (ie club or inter-club competitions)	13%	12%	13%	17%	19%	26%
Ability to secure optimum tee times	5%	9%	13%	15%	19%	39%

Member would play more often if:					
	Definitely not	Not likely	Possibly	Most Likely	Definitely Yes
More of their family played	8%	24%	32%	22%	14%
More of their friends played	5%	18%	32%	29%	16%
They had more time	4%	13%	14%	26%	43%
The game was shorter	33%	40%	18%	6%	3%
They were a better golfer	18%	31%	26%	17%	8%
Golf was more affordable	13%	33%	28%	16%	10%
They enjoyed golf more	31%	28%	24%	10%	7%

Average price paid for affiliated green fees:	
Less than \$10	4%
\$10 - \$20	17%
\$21 - \$30	35%
\$31 - \$40	27%
\$41 - \$55	12%
\$56+	5%

Member's reasons for playing golf in order of importance (1 being most important)					
	1	2	3	4	5
For physical / health reasons	19%	24%	23%	19%	15%
For social reasons	18%	22%	23%	26%	11%
For the personal challenge	41%	22%	18%	14%	5%
For stress relief / relaxation	11%	18%	22%	23%	26%
For competition	10%	14%	14%	18%	44%

CASUAL GOLFERS

Age first introduced to golf:	
Under 5 years	3%
5 - 9 years	9%
10 - 14 years	19%
15 - 19 years	17%
20 - 29 years	16%
30 - 39 years	11%
40+ years	25%

How they were introduced:	
Through a spouse or partner	5%
Through a family member	40%
Through a friend or social network	32%
Through work or a work colleague	10%
Started independently	13%

Have been a member of a New Zealand golf club previously	
Yes	77%
No	23%

Influences for not why they are not currently a member of a New Zealand golf club:				
	Definitely not an influence	Not really an influence	Yes an influence	Yes Definitely a big influence
Don't have enough time to have a membership	14%	20%	38%	28%
Prefer the flexibility of playing different courses	21%	35%	32%	12%
Memberships are too expensive	7%	19%	41%	33%
Don't enjoy golf enough	74%	19%	6%	1%
Prefer the driving range	79%	18%	2%	1%
There is a lack of quality courses in my area to join.	76%	20%	3%	1%
Golf clubs have too many rules and regulations (ie dress code)	67%	26%	5%	2%
Golf clubs don't provide enough flexibility for playing times	50%	35%	12%	3%

Influences that would persuade them to purchase a membership at a golf club:					
	Definitely no influence	Not much influence	A small influence	Quite an influence	Definitely an influence
A family member joined at the same time	30%	19%	24%	20%	8%
A friend joined at the same time	20%	13%	26%	30%	11%
Golf clubs were more social and welcoming	22%	25%	26%	18%	9%
Golf clubs were more family oriented	31%	33%	20%	11%	5%
Membership packages provided coaching and facilities to help me improve	21%	22%	25%	21%	11%
Membership packages provided discounted access to / partnership with other facilities / sports clubs (ie cheap rates at the gym etc)	22%	23%	24%	20%	11%
There was more flexibility around paying around paying for the membership (ie not a lump sum)	16%	20%	24%	25%	15%
Memberships were more affordable per game of golf played	8%	10%	19%	33%	30%
A membership package included a range of golf clubs in my area	12%	11%	20%	30%	27%
Golf clubs offered family friendly facilities	29%	28%	22%	14%	7%

How they book tee times:	
Via the internet	35%
Phone the club	35%
I just turn up to the club	30%

How they buy green fees:	
At the club when they arrive	81%
Via www.golf.co.nz	10%
On GrabOne	7%
On another discount green fee website	2%

Playing golf:					
	Definitely not	Not really	About the same	Yes they would	Definitely
Would like to play more golf than they currently do	1%	4%	8%	46%	41%
Plan to play more golf in the future	1%	7%	15%	43%	34%
Hope to improve playing ability in the future	1%	4%	10%	40%	45%

Rating of importance of getting a handicap:

Not important	Moderately Important	Would love an official handicap
13%	46%	41%

Average price paid for casual green fees:

Less than \$10	3%
\$10 - \$20	15%
\$21 - \$30	35%
\$31 - \$40	30%
\$41 - \$55	12%
\$56+	5%

Number of different courses Casual golfers played in the last 12 months

1 - 4	64%
5 - 9	26%
10 - 20	8%
21 - 30	1%
31+	1%

How many times played at a New Zealand Golf Club in the last 12 months (not including driving ranges):

Less than 5	45%
5 - 9	22%
10 - 20	22%
21 - 30	7%
31+	4%

How long those that had been members, were members of a golf club:

Less than 1 year	3%
1 - 2 years	21%
3 - 5 years	28%
6 - 10 years	20%
11 - 15 years	11%
16 - 20 years	5%
Longer than 20 years	12%

How long it has been since they were members of a golf club:

Less than 1 year	11%
1 - 2 years	28%
3 - 5 years	34%
6 - 10 years	17%
11 - 15 years	5%
16 - 20 years	3%
Longer than 20 years	2%

ALL RESPONDENTS

Their golf coaching experience:

Never had a professional coaching session and don't plan on having any in the future	11%
Never had a professional coaching session but may have one in the future	16%
Have had one or two coaching sessions	47%
Had many coaching sessions, not likely to have any in the future	10%
Have had many coaching sessions and will continue to have them	16%

Would take part in a nine hole competition that would take 1.15 - 1.5 hours:

Yes	62%
No	38%

Generally happy with the amount of time it takes to play:

Always	13%
Most of the time	74%
Sometimes	12%
Never	1%

Use their mobile phone while on the course:

Yes mainly for golf purposes	9%
Yes mainly for purposes other than golf	23%
No	68%

Use a Distance Measuring Device:

Yes	25%
No	75%

Age of current set of golf clubs:

Almost new	4%
Under 1 year	6%
Approximately 1 - 2 years	16%
Approximately 3 - 5 years	29%
Greater than 5 years	45%

Think that playing in less time would improve enjoyment of the game:

Yes	27%
No	22%
The length of time doesn't matter	51%

When playing 18 holes in a group of four, the average time it takes them:

2.5 - 3 hours	1%
3 - 3.5 hours	19%
4 - 4.5 hours	62%
4.5 - 5 hours	8%
5 - 5.5 hours	2%
Not applicable	8%

What prevents them from playing more golf:

Work commitments	56%
Family commitments	53%
Alternative hobbies	33%
Cost of play	31%
Cost of equipment	4%
Difficult to play	7%
Time it takes to play	24%

Where equipment is mostly purchased from:

At a golf pro shop	33%
Online	17%
At The Golf Warehouse	25%
At Rebel Sport	3%
At another golf retail shop	15%
Other	7%