



CURIOSITYMATTERS



PROJECTALBATROSS

Phase II: Online Golf Survey

Central Gauteng Golf Union
September 2015

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- Non-club member feedback
- Key learnings
- Recommendations

Objectives and Method

Objectives

The key objectives for the study were to assess:

- Current attitudes and behavior towards golf and golf membership
- Triggers and barriers to playing golf / having golf membership

Method & Sample

- A questionnaire was designed for online completion
- A link was sent to individual clubs and Playmoregolf to e-mail to their mailing lists
- The open-ended questions from the first 877 completed questionnaires were captured
- A total of 2460 completed questionnaires were analysed
- A survey was considered 'completed' if:
 - Key questions were answered, e.g.: 'Are you currently a club member'
 - More than 80% of the questionnaire was completed
- A number of prizes were offered to incentivize people to complete questionnaires



SURVEY**MATTERS**

CLUB MEMBERS – participants that are current members of a club

Golfing Habits – Club Members

Q7. With which club do you currently have membership?

All respondents (1881)	Numbers
Royal Jhb & Kensington Golf Club	193
Ruimsig Country Club	176
Observatory Golf Club	145
Eagle Canyon Country Club	105
Bryanston Country Club	104
Randpark Golf Club	89
CMR Golf Club	81
Wanderers Golf Club	77
Parkview Golf Club	70
Riviera on Vaal Country Club	62
Dainfern Estate & Country Club	55
Modderfontein Golf Club	53
Crown Mines Golf Club	46
Houghton Golf Club	42
Glenvista Country Club	37
CCJ – Country Club Johannesburg	34
Southdowns Country Club	22
Leeuwkop Golf Club	19
Krugersdorp Golf Club	15
Huddle Park Golf Club	14
Jackal Creek Golf Club	11
Killarney Country Club	10
Soweto Country Club	8
Other	413

Participants from 23 of the 34 clubs in the Union completed the survey

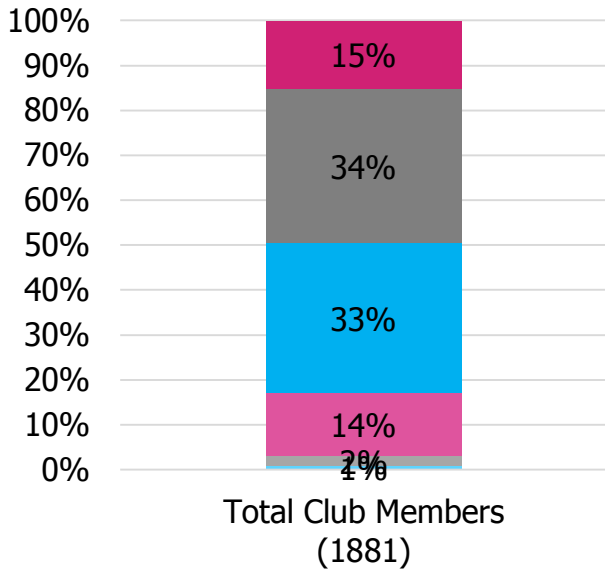
The relatively high number of respondents that indicated 'other' could include:

- Those that did not want to indicate which club they belonged to
- Those that resigned from a club in the past 2 years and joined a club outside the region

Demographics – Club Members

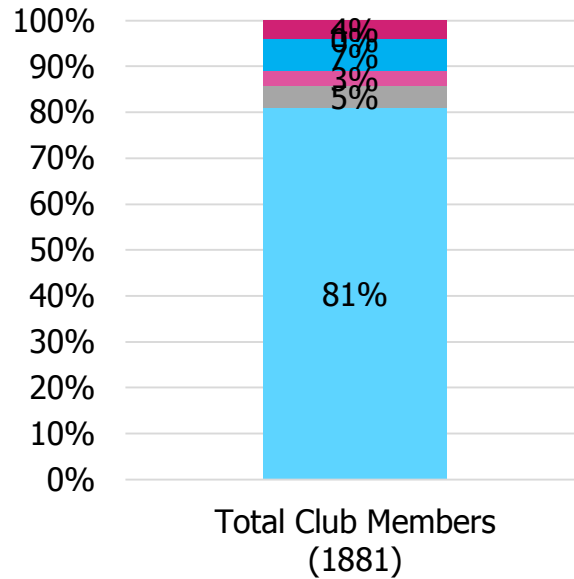
Most club members that responded are **White, male**, and older than 34, with almost half the sample **over the age of 50**

AGE



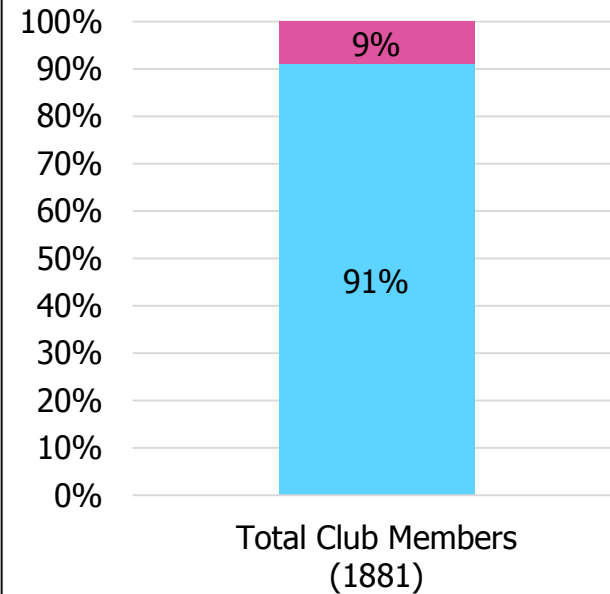
- Younger than 19
- 19-25
- 26-34
- 35-50
- 51-65
- Older than 65

RACE



- I don't want to answer this
- Other
- Asian/Indian
- Coloured
- Black
- White

GENDER

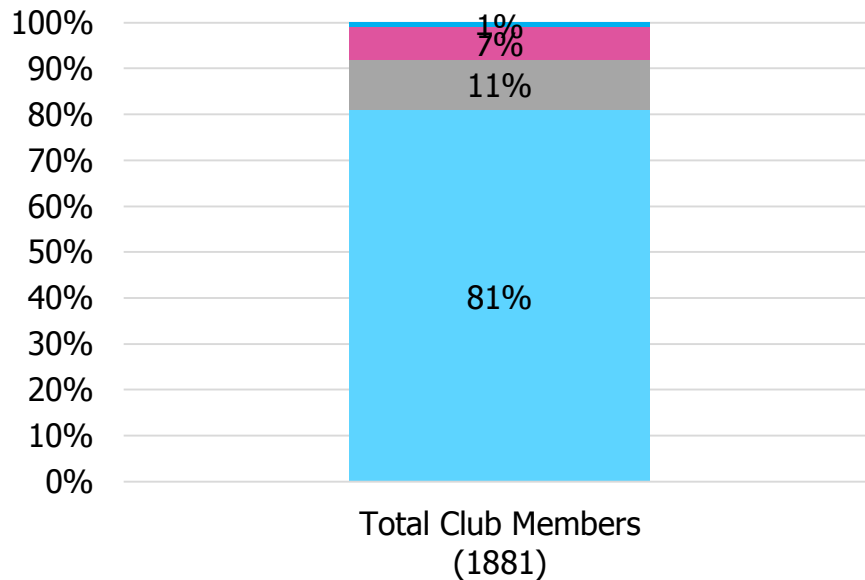


- Male
- Female

Demographics – Club Members

They are mostly married with an average of 1.72 children, with an average age of 22 years

MARITAL STATUS



Average number of children
= 1.72

Average age of children
= 22 years

- I don't want to answer this
- Divorced / Widowed
- Single / unmarried
- Married / living together

Golfing Habits – Club Members



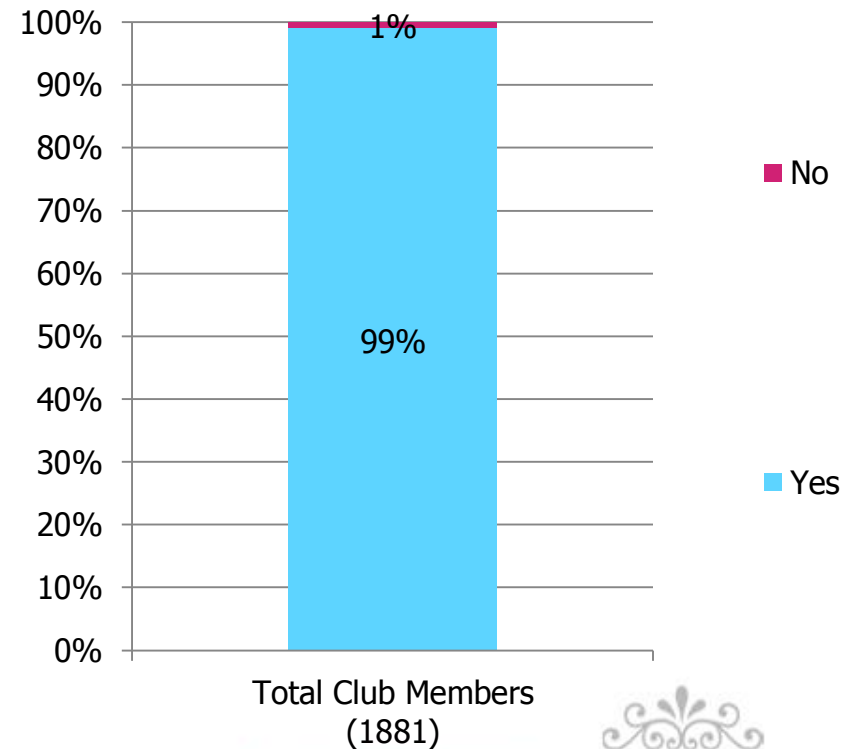
The majority have played golf for more than 5 years

Only 48 respondents indicated that they do not play golf anymore

Q1. How long have you been playing golf?



Q2. Do you still play golf?



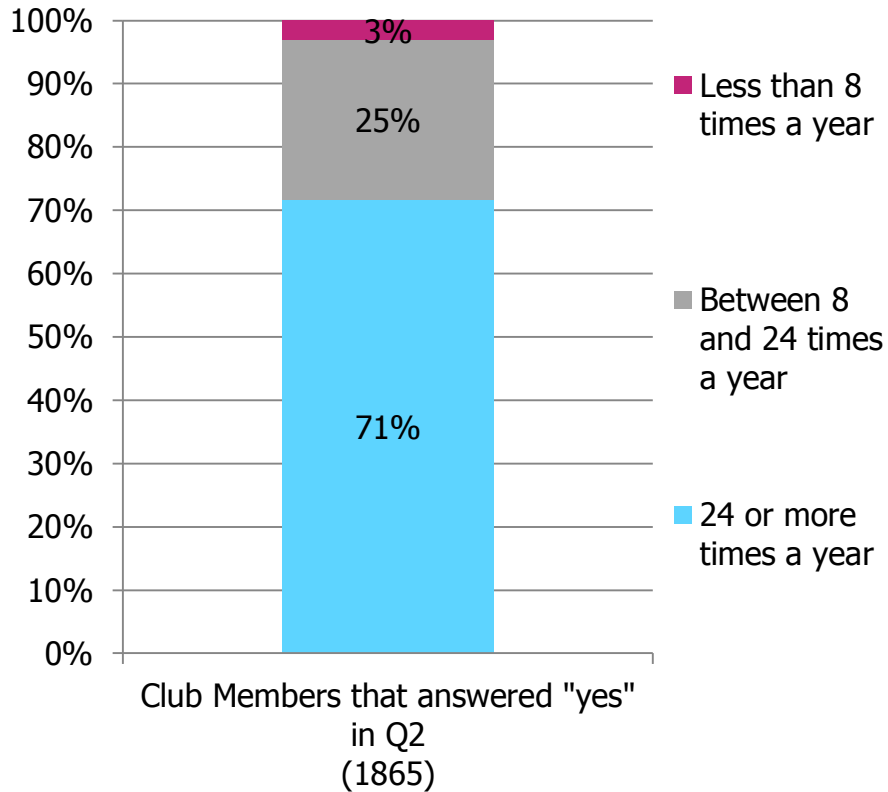
Golfing Habits – Club Members



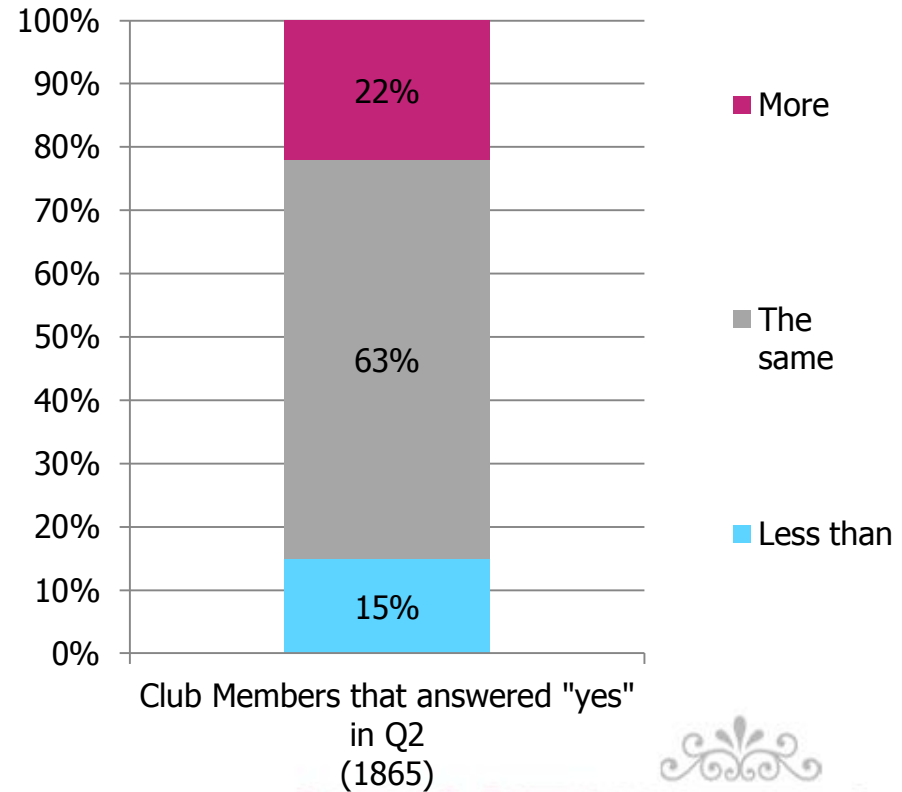
The majority play golf at least 2 or more times per month

And most play the same amount as 2-5 years ago

Q3. How often do you play golf?

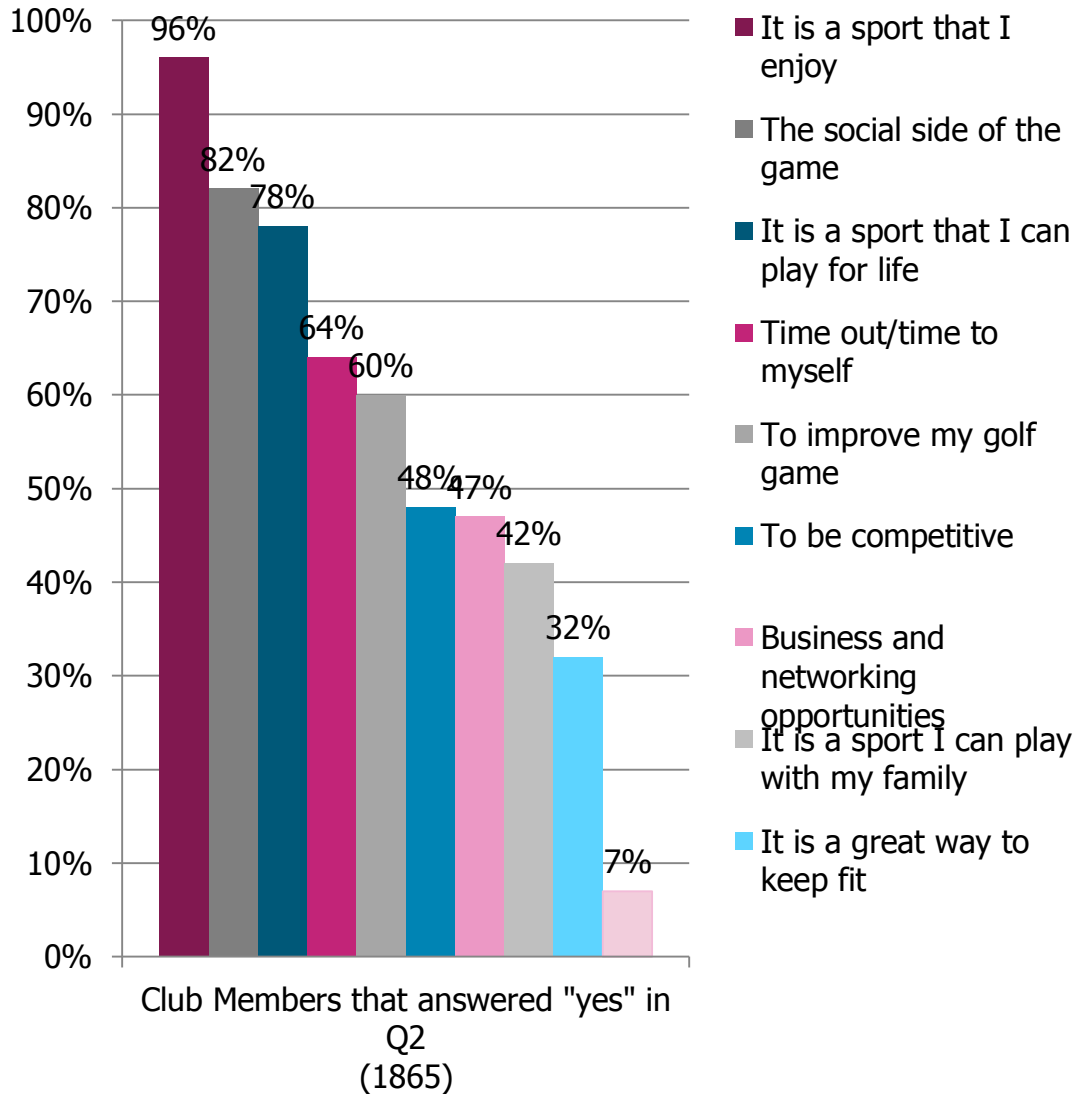


Q4. How does this compare to the last 2-5 years?



Golfing Habits – TOTAL Club Members

Q5. Mark all the reasons you play golf

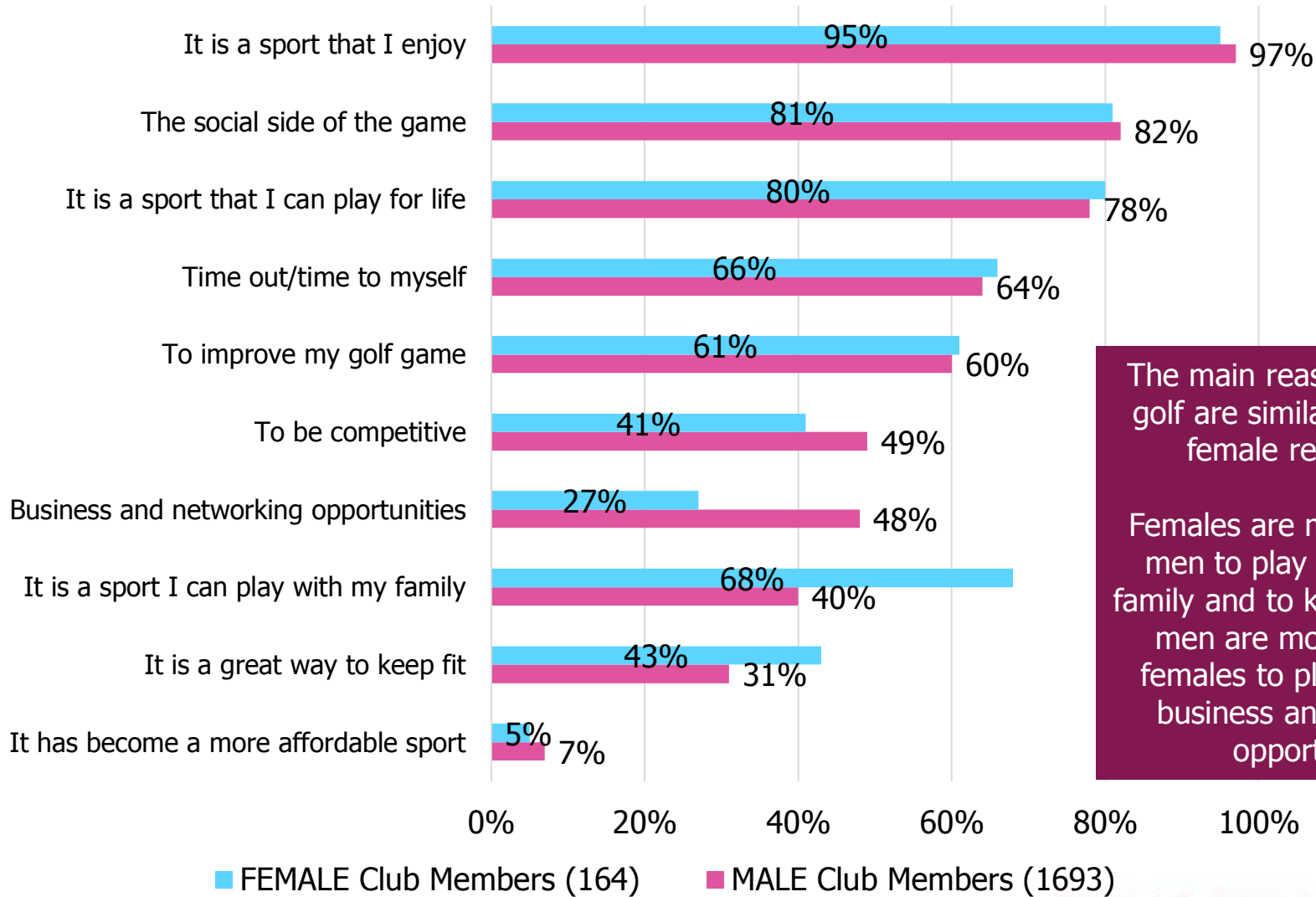


The main reasons for playing golf include **enjoyment, sociability** and **a game you can play for life.**

At a second level reasons include **time out for yourself** and **improving your golf game.**

Golfing Habits – Club Members by GENDER

Q5. Mark all the reasons you play golf

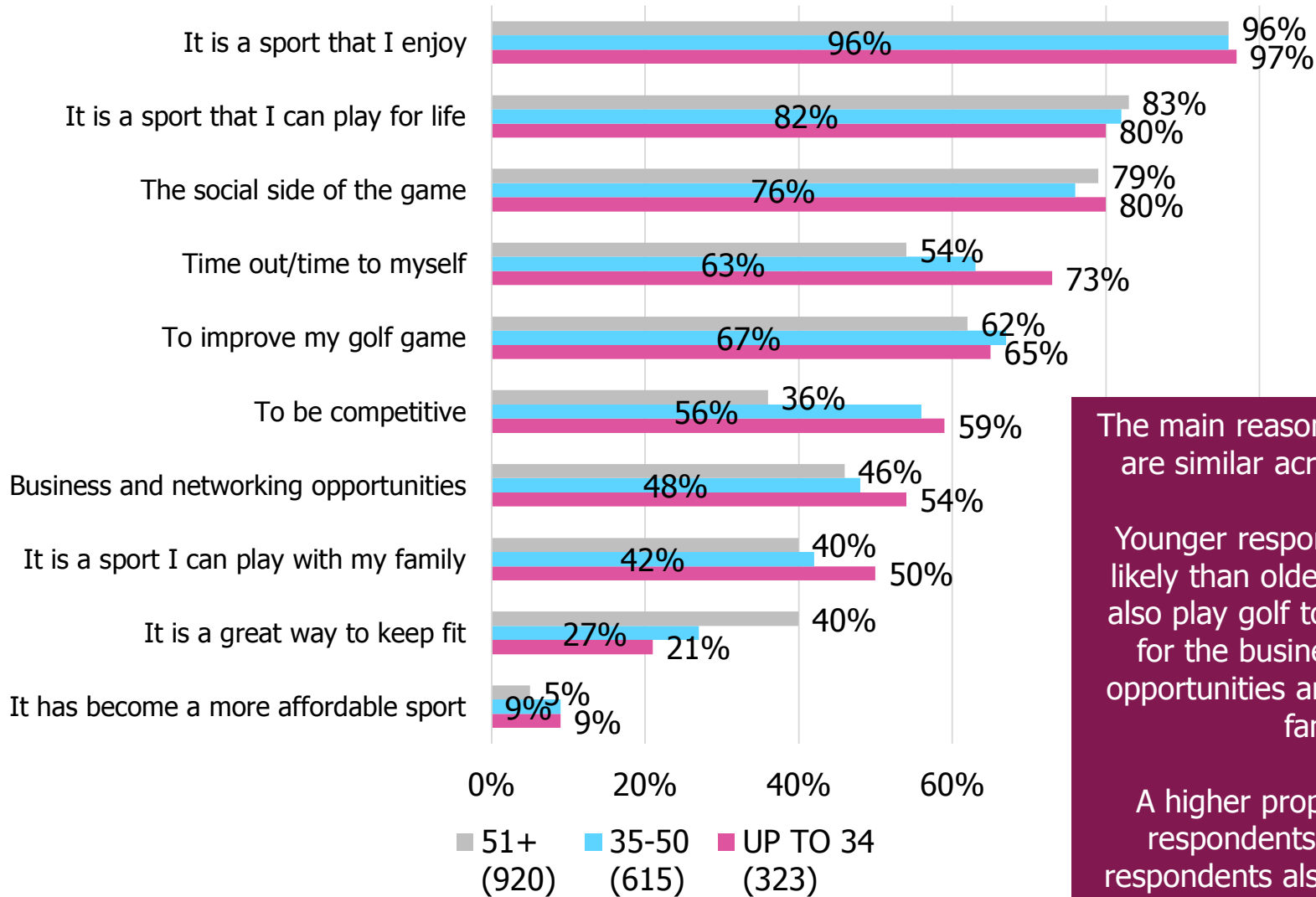


The main reasons for playing golf are similar for male and female respondents.

Females are more likely than men to play golf with their family and to keep fit, whereas men are more likely than females to play golf for the business and networking opportunities.

Golfing Habits – Club Members by AGE

Q5. Mark all the reasons you play golf



The main reasons for playing golf are similar across age groups.

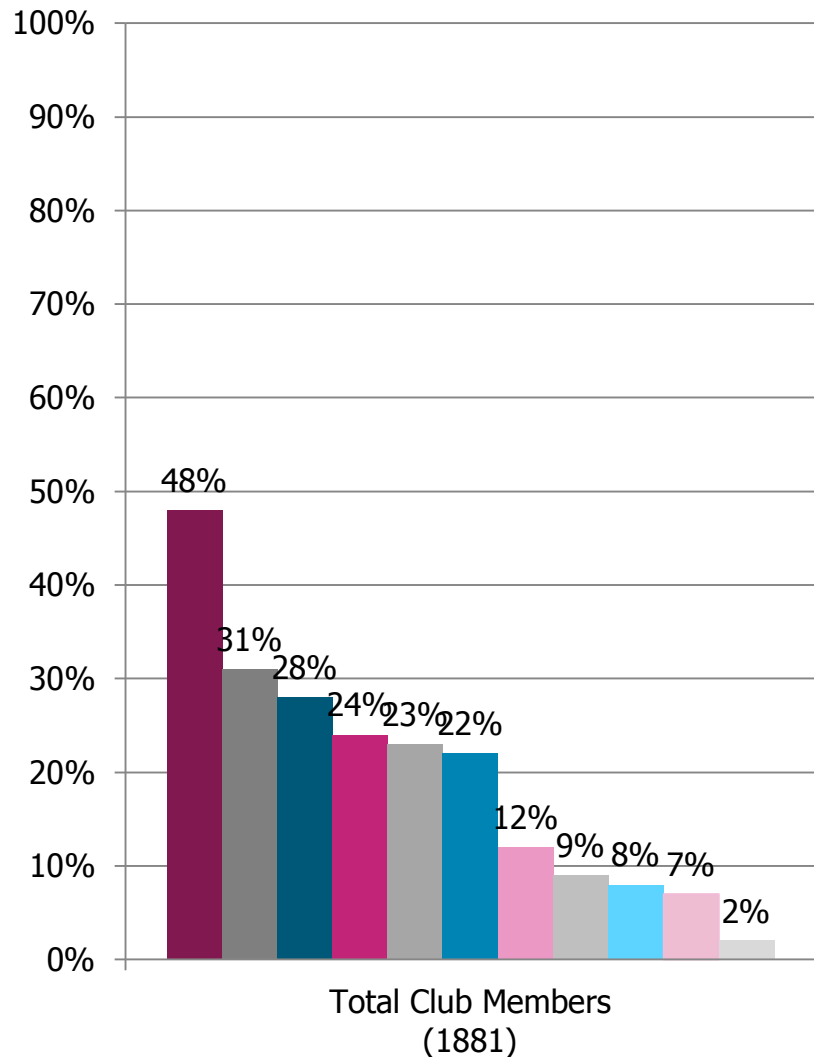
Younger respondents are more likely than older respondents to also play golf to be competitive, for the business/networking opportunities and to be with the family.

A higher proportion of older respondents than younger respondents also play to keep fit

Golfing Habits – Club Members

Q6. Mark all that stops you from playing golf/playing more often

COST and **TIME** are the biggest barriers to playing golf, and the frequency thereof

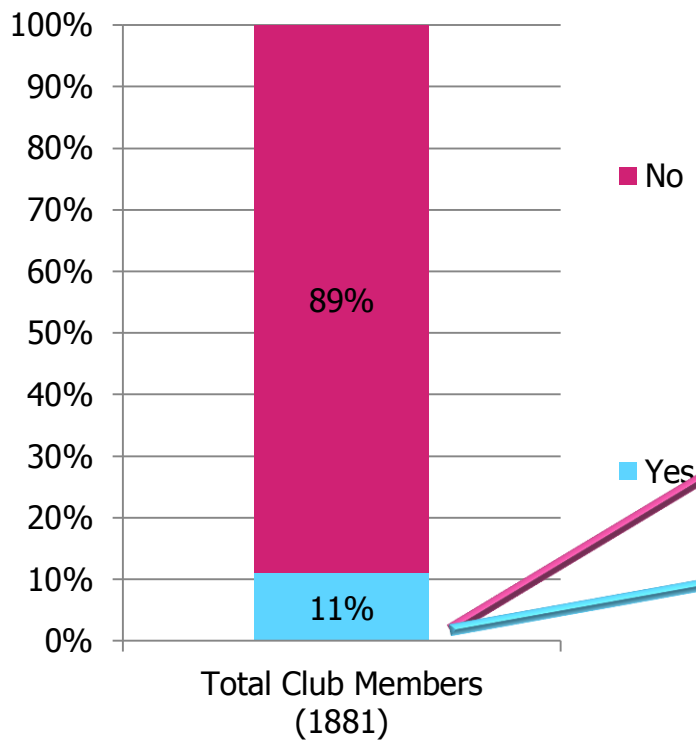


- The cost of the rounds
- The time it takes from spending time with my family
- The ongoing cost of equipment and apparel
- The time it takes to complete a round
- The additional costs on a golfing day - socialising/food and drinks
- I have other sports and activities that I like to spend time doing
- I am looking for more variety in the courses that I can play as a member of a golf club
- Not enough activities and facilities for the family (partner and/or kids) at my club
- I like to socialize in other places, away from the golf club
- Golf is a difficult game and my game is not improving as quickly as I would like it to
- The type of social environment at my previous club

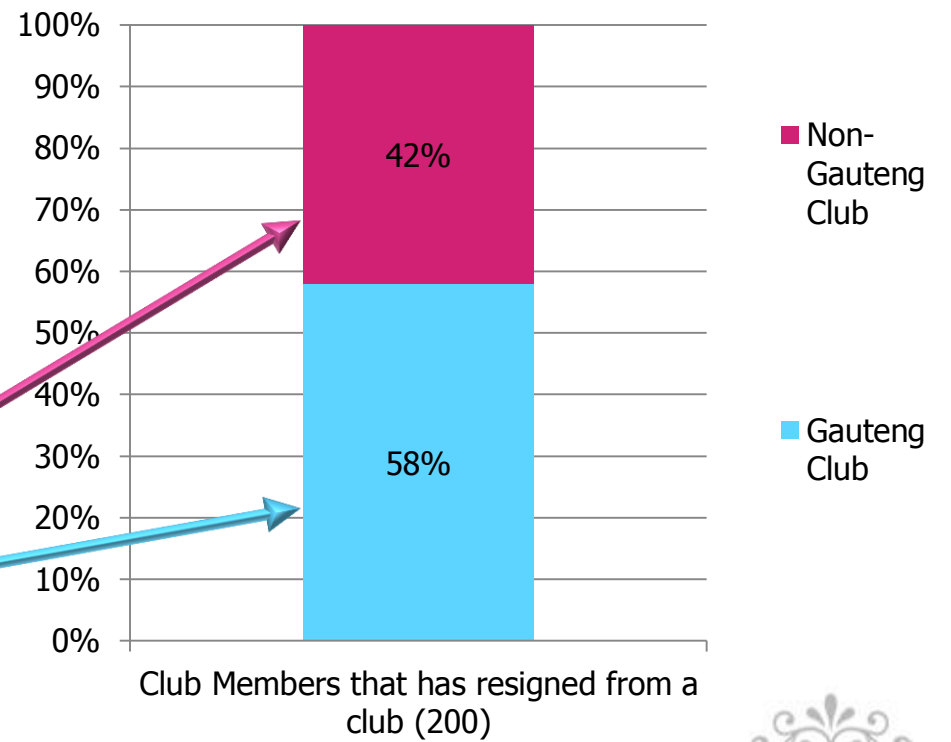
Golfing Membership – Club Members

11% of club members had resigned from a club in the past 2 years. Of those nearly 60% were from Gauteng clubs

Q2. Resigned from a club in the past 2 years?



Q3a. Which club?

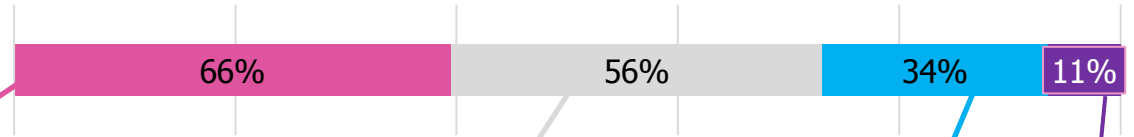


Golfing Habits – Club Members

Q3b. Mark all the reasons you resigned from the club

- I WAS UNSATISFIED WITH MY GOLF CLUB
- OTHER REASONS
- ANOTHER TYPE OF GOLF MEMBERSHIP WAS MORE RELEVANT OR ATTRACTIVE TO ME
- GOLF WAS TAKING TOO MUCH TIME

Total Club Members that answered "yes" in Q2
(200)



I moved away from the area	38%
I was not playing enough golf to justify the membership	25%

It was too expensive	26%
There were not enough benefits to being a member	20%
Unacceptable management of the club	17%
Condition of the course in general was not acceptable	16%

Playmoregolf	17%
A remote club for affiliation purposes only	16%

From Other Activities	7%
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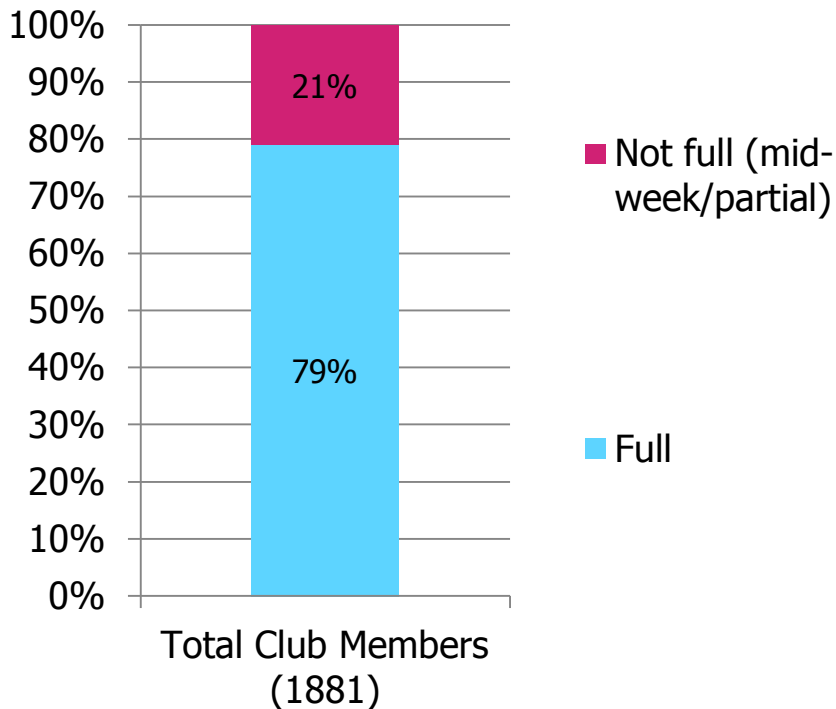
Golfing Membership – Club Members



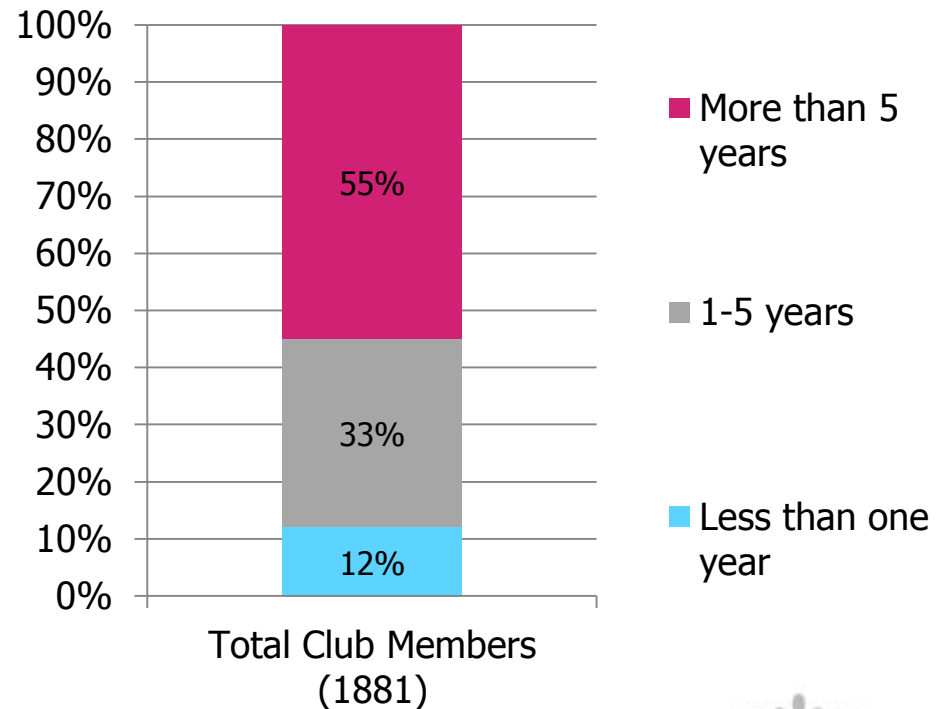
Most have full club membership

Just over half have had their current membership for longer than 5 years

Q8. Type of membership currently have?



Q9. Length of membership

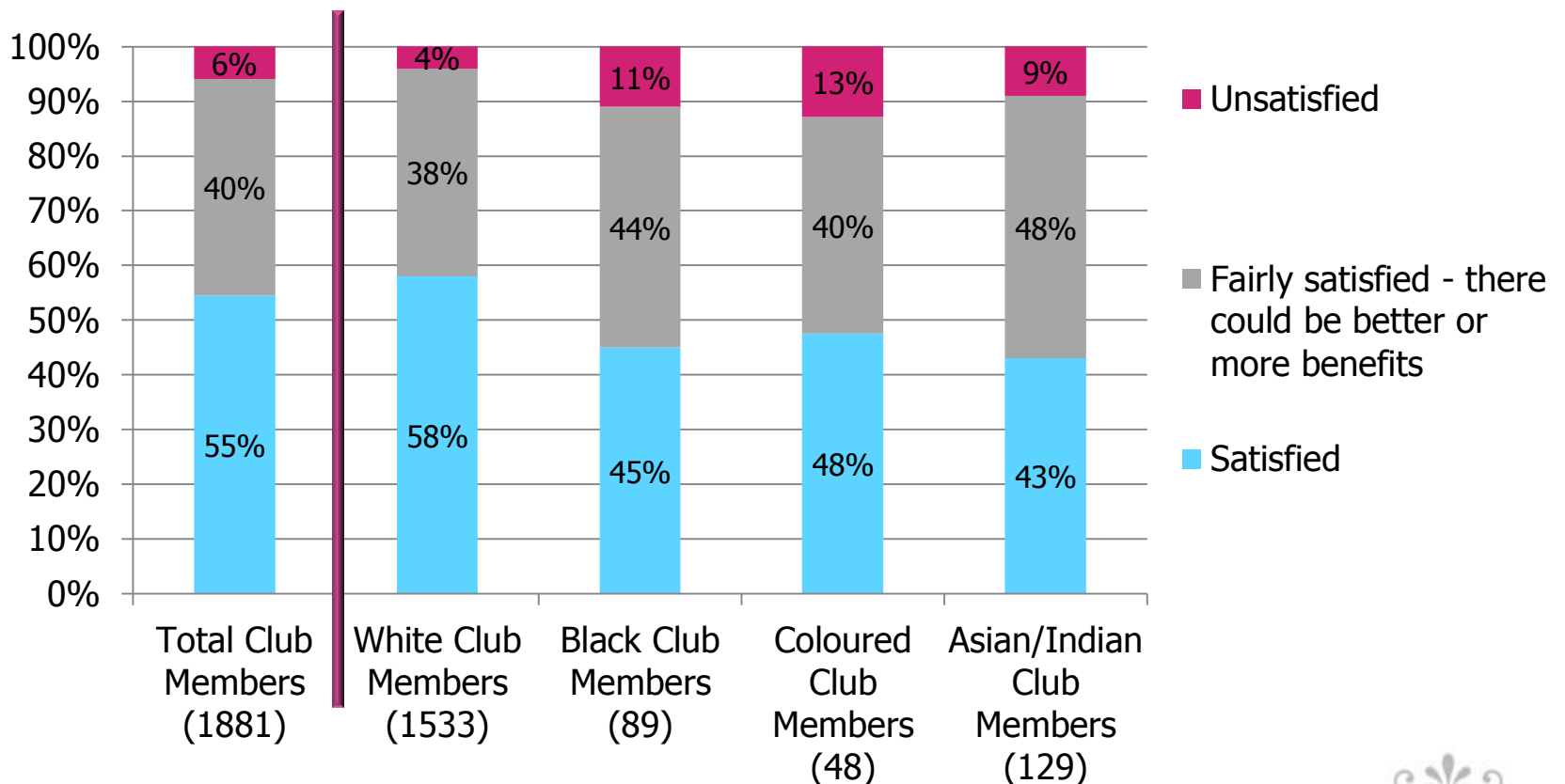


Golfing Membership – Club Members by RACE

Q10. How do you feel about the benefits of your membership at your club?

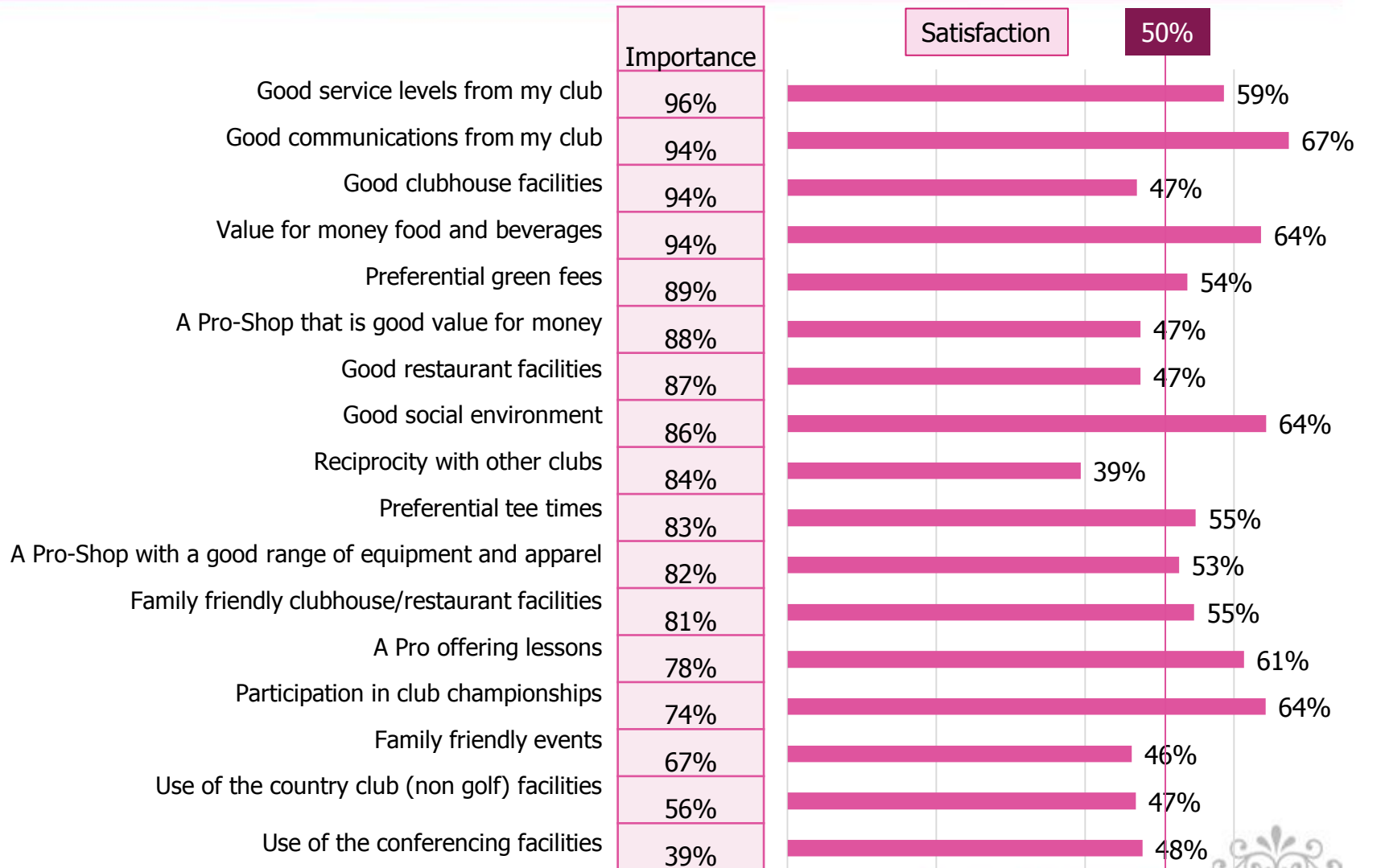


Only 55% of club members are satisfied with the benefits of their club. An even lower proportion of Black, Coloured and Asian/Indian members are satisfied



Importance of and satisfaction with benefits of golf club membership

Base: All Club members (1881)



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Importance = respondent marked important or critically important
 Satisfaction = respondent gave a rating of 4 or 5 out of 5

Ranking of Importance of Benefits Offered by Clubs



There are very few differences in the importance of benefits across age and gender – all golfers are ideally looking for similar benefits

	Age				Gender	
	Total	Up to 34 years	35-50 years	51+ years	Male	Female
	1881	326	620	928	1705	168
Good service levels from my club	1	1	1	1	1	1
Good communications from my club	2	5	3	2	2	2
Good clubhouse facilities	3	2	2	3	3	3
Value for money food and beverages	4	3	4	4	4	4
Preferential green fees	5	4	5	6	5	6
A Pro-Shop that is good value for money	6	8	8	5	6	8
Good restaurant facilities	7	9	6	8	7	5
Good social environment	8	7	9	7	8	7
Reciprocity with other clubs	9	10	7	10	9	10
Preferential tee times	10	6	10	11	11	13
A Pro-Shop with a good range of equipment and apparel	11	11	12	9	10	11
Family friendly clubhouse/restaurant facilities	12	13	11	12	12	12
A Pro offering lessons	13	14	14	13	13	9
Participation in club championships	14	12	13	14	14	14
Family friendly events	15	15	15	15	15	15
Use of the country club (non golf) facilities	16	16	16	16	16	16
Use of the conferencing facilities	17	17	17	17	17	17

Satisfaction with Benefits Offered by Club

Base: Respondents from clubs that offer the facility



There are both age and gender differences in the level of satisfaction as indicated by the shaded areas

TOP 2 BOX % (4 or 5 out of 5)	Total	AGE			GENDER	
		Up to 34 years	35-50 years	51+ years	Male	Female
Good service levels from my club	59%	64%	59%	59%	60%	59%
Good communications from my club	67%	63%	66%	71%	67%	70%
Good clubhouse facilities	64%	66%	61%	67%	65%	60%
Value for money food and beverages	47%	54%	49%	45%	48%	48%
Preferential green fees	54%	61%	51%	55%	54%	61%
A Pro-Shop that is good value for money	47%	44%	45%	51%	47%	44%
Good restaurant facilities	47%	55%	47%	44%	46%	47%
Good social environment	64%	65%	61%	68%	64%	67%
Reciprocity with other clubs	39%	43%	35%	43%	39%	43%
Preferential tee times	55%	53%	53%	57%	56%	59%
A Pro-Shop with a good range of equipment and apparel	53%	51%	51%	55%	53%	48%
Family friendly clubhouse/restaurant facilities	55%	56%	54%	55%	54%	61%
A Pro offering lessons	61%	53%	59%	65%	60%	69%
Participation in club championships	64%	64%	64%	65%	63%	69%
Family friendly events	46%	51%	44%	45%	44%	58%
Use of the country club (non golf) facilities	47%	49%	49%	44%	47%	53%
Use of the conferencing facilities	48%	51%	48%	48%	48%	57%

Ranked according to importance of benefit

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Golfing Membership – Club Members

Q13. What, if any, other benefits would you like or have liked to receive from your membership?



The majority of members had no suggestions for other benefits, indicating that areas for improvement rather lie in current benefits

	TOTAL (843)
Nothing/none	64%
Cost of game and membership and value for money	8%
Other facilities and activities	8%
Club facilities, caddies and marshals	6%
Loyalty programmes and schemes	5%
Interclub, league and competition issues	3%
Attracting new golfers	2%
Management and communication	2%
Etiquette and standards	2%
Reciprocity and interclub relationships	1%
Timekeeping and speed of play	1%
Member appreciation and prioritisation	1%
Loyalty programmes/ a reward system	1%
Member equality	0%
Booking system	0%

A lower cost option for non-regular golfers/ better green fee rate for juniors/ extending the weekday membership benefit to 80% discount on green fees for Sunday

Discounts for long membership/ specials for school children during school holidays the more preferential your tee off time are the more one gets some discounts

Value for money/ value for money green fees

Good course condition/ the golf course should be well maintained

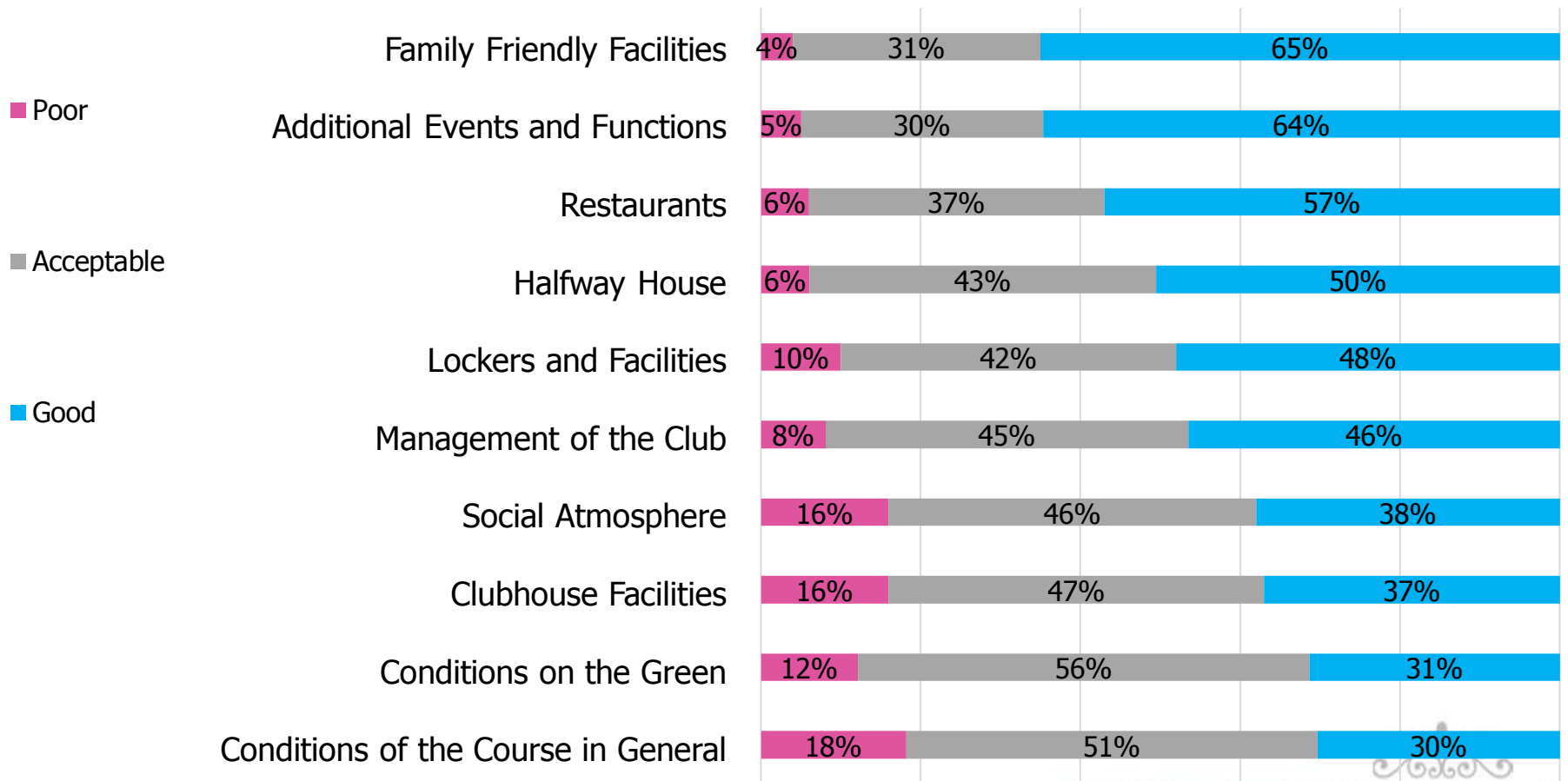
Availability of golf carts/ driving range facilities/ personal golf cart

Golfing Membership – Club Members

Q17. How would you rate your club on the following



Key areas for improvement include the conditions of the course in general, conditions on the green, the clubhouse facilities and the social atmosphere at the club



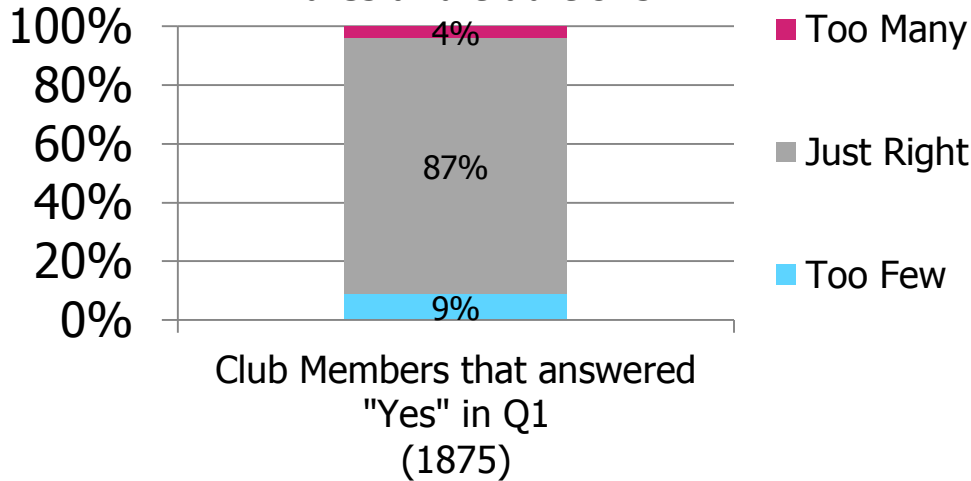
Club Members that answered "Yes" in Q1 (1875)

Golfing Membership – Club Members

Q17. How would you rate your club on the following

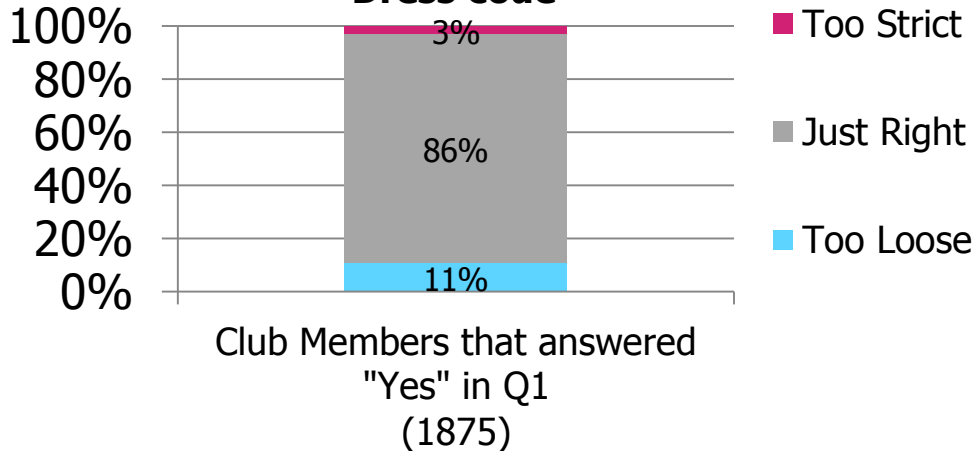


Rules and traditions



Most club members appear comfortable with the rules, traditions and dress code of their club

Dress code



Golfing Membership – Club Members

Q18. Which of the following would improve golf and potentially encourage you to play golf more often?



Reciprocity/ variety - the ability to play at more courses at members' rates

Cheaper rounds

Free skills clinics

Affordable lessons

Environment that facilitates socializing with friends / colleagues

If more of my friends played golf

An environment that includes and caters for my family

If my family were more interested in playing golf

Shorter formats - 9 hole or 12 hole golf courses

More relaxed rules and traditions

More relaxed dress code

Easier golf courses

65%

63%

33%

26%

25%

25%

23%

20%

11%

8%

6%

6%

Mean = R287.80

Meeting the key needs of **VARIETY** and **AFFORDABILITY** would potentially increase frequency of golf occasions

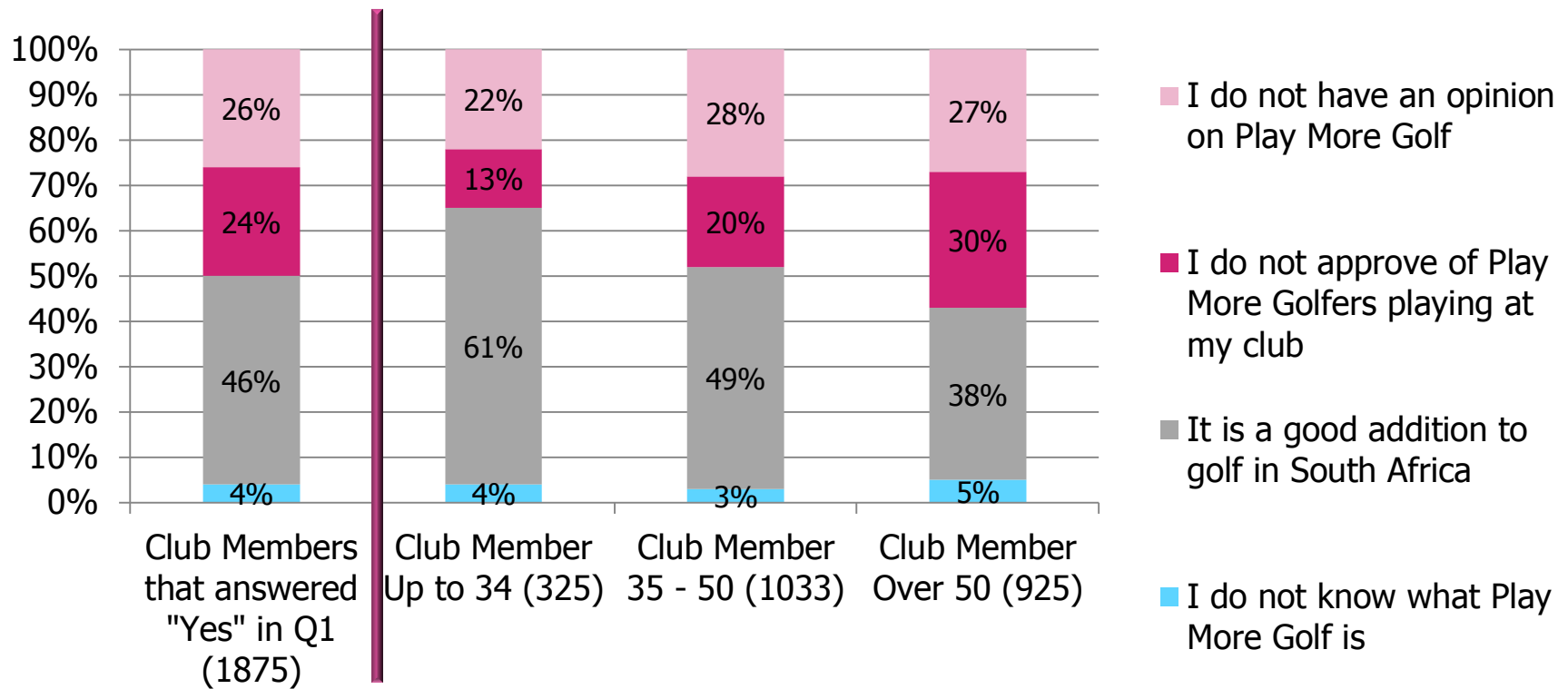
Club Members that answered "Yes" in Q1 (1875)

Golfing Membership – Club Members by AGE

Q20. Which of these statements best describe how you feel about Playmoregolf



Nearly half of the members felt that Playmoregolf is a good addition to golf in South Africa. This view was particularly held by younger members





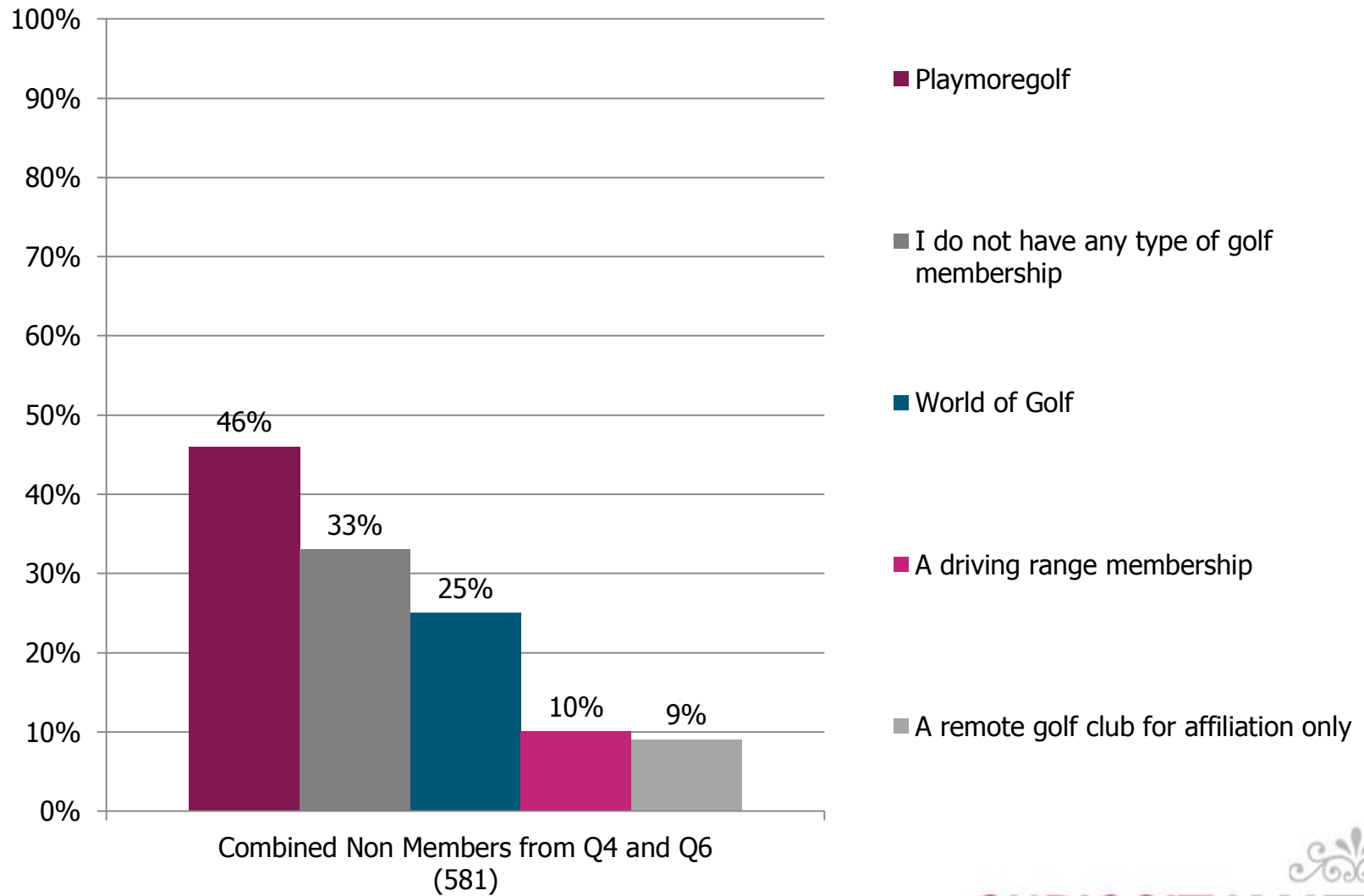
SURVEYMATTERS

Non Club Members

This includes:

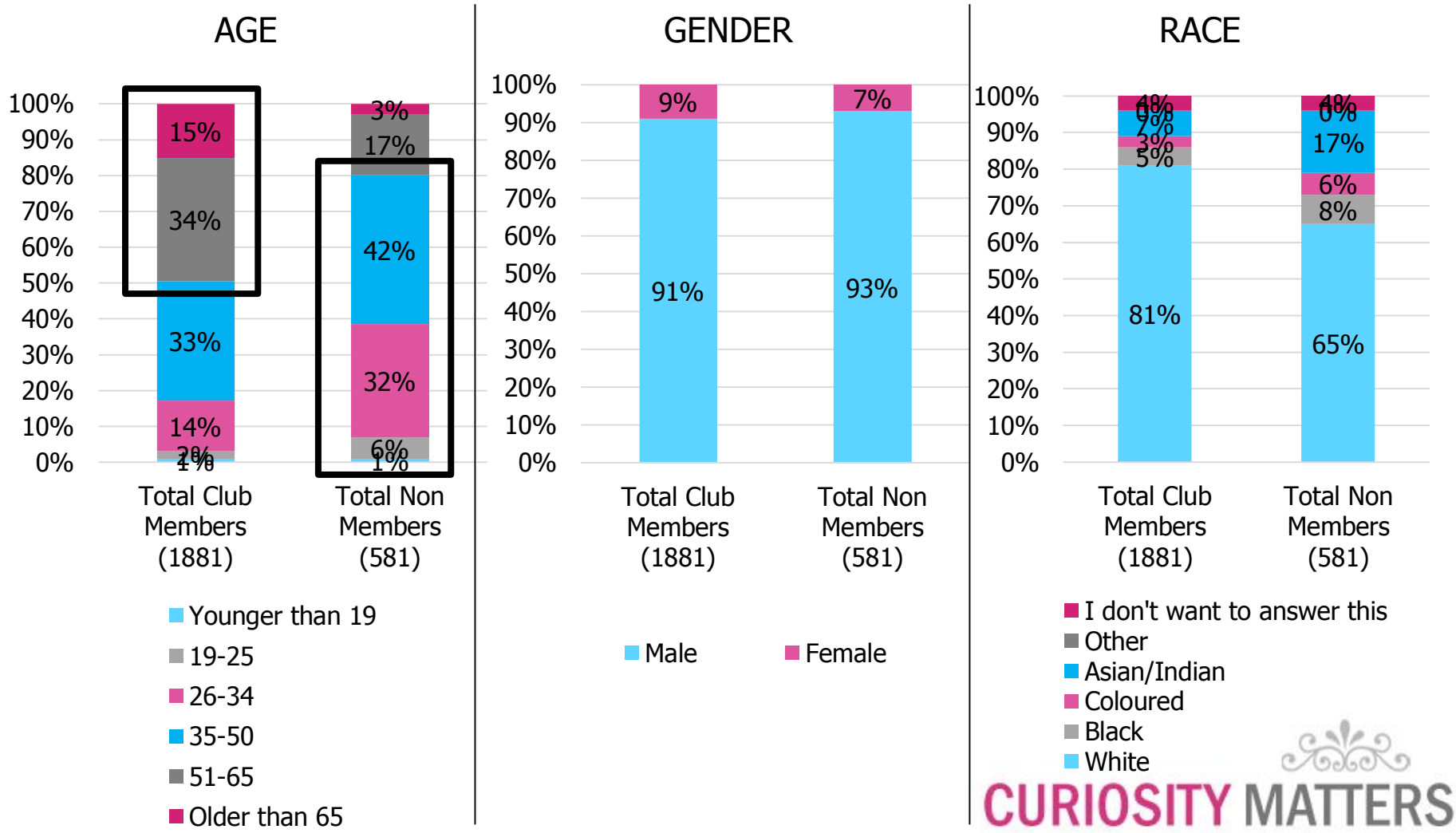
- Playmoregolf (224)
- World of Golf (127)
- Driving range (42)
- Remote golf club members (43)
- People with no membership (95)

Non Members – Membership Type



Demographics – Club vs. Non Members

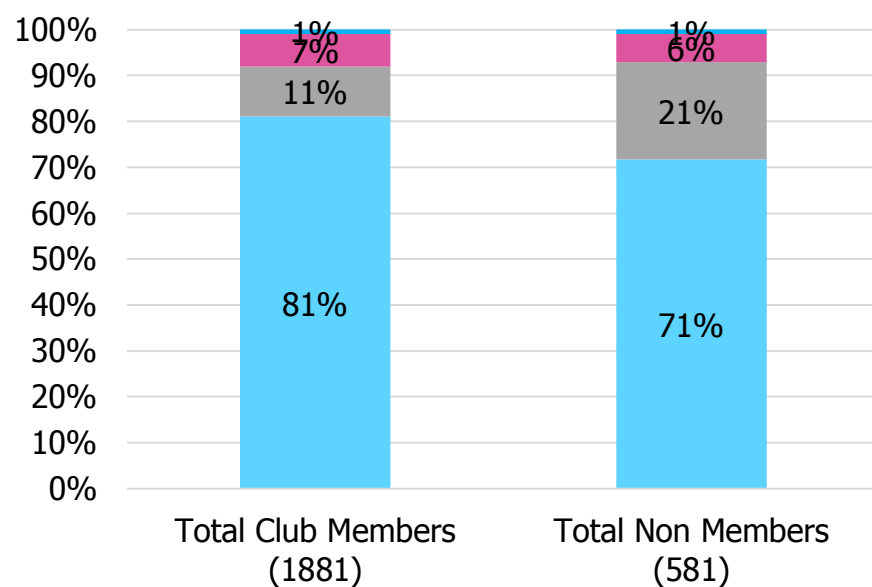
Non club members tend to be **younger and more racially diverse** than club members



Demographics – Club vs. Non Members

The majority of non-club members are married/co-habiting, although a slightly lower proportion when compared to club members. They have an average of fewer children, and the children are significantly younger on average, consistent with the lower age median of this sample

MARITAL STATUS



- I don't want to answer this
- Divorced / Widowed
- Single / unmarried
- Married / living together

The average number of children is:	
Club Members	1.72
Non Members	1.25

The average age of children is:	
Club Members:	22.13
Non Members:	13.29

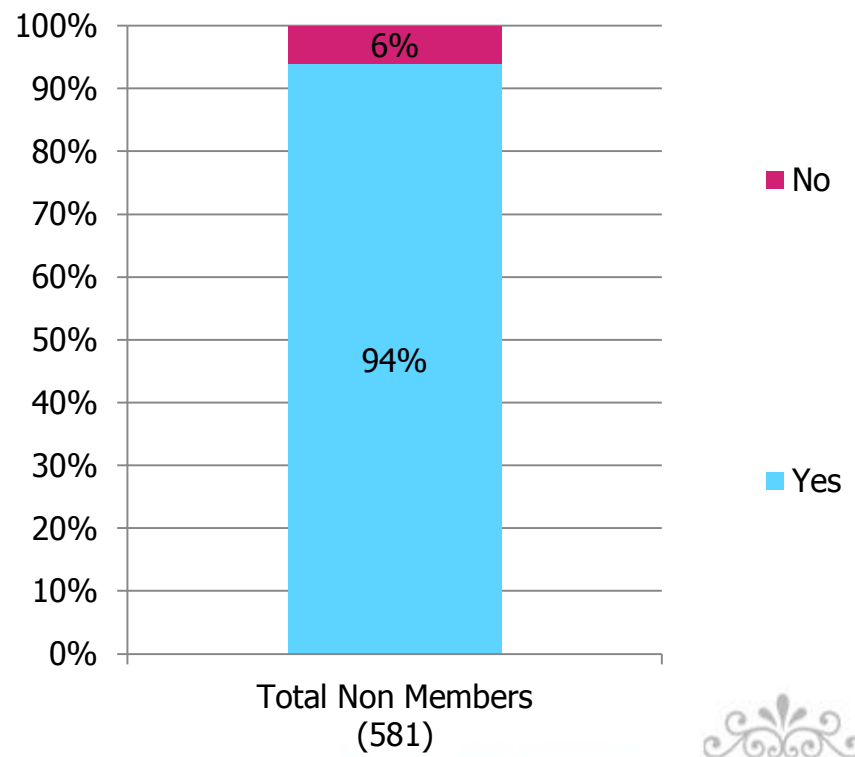
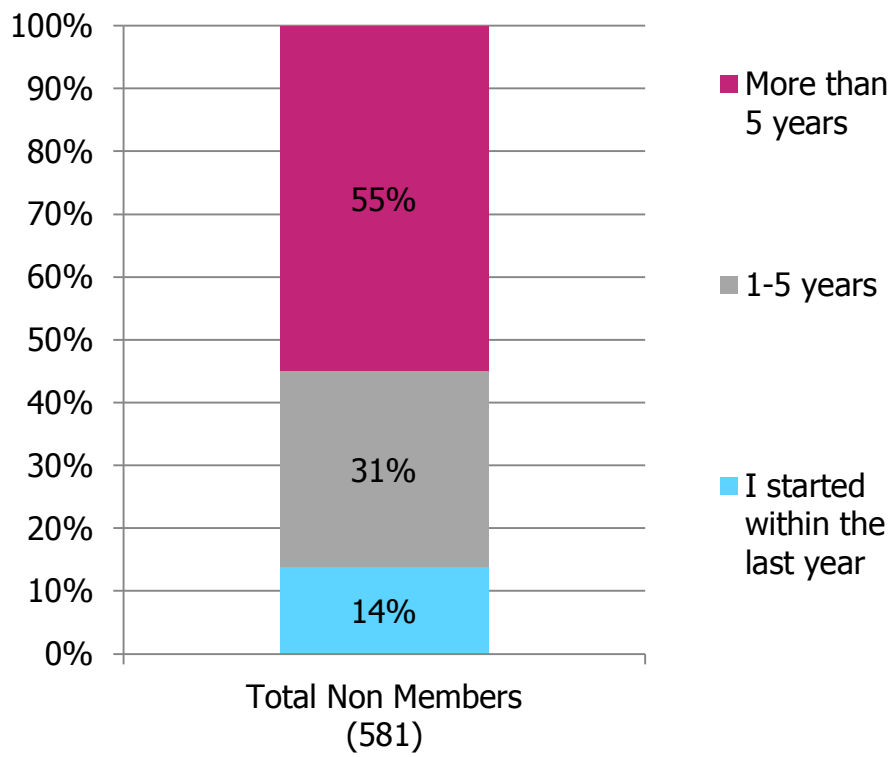
Golfing Habits – Non Members

Non-club members have been playing golf for fewer years than club members

Most non members still play golf

Q1. How long have you been playing golf?

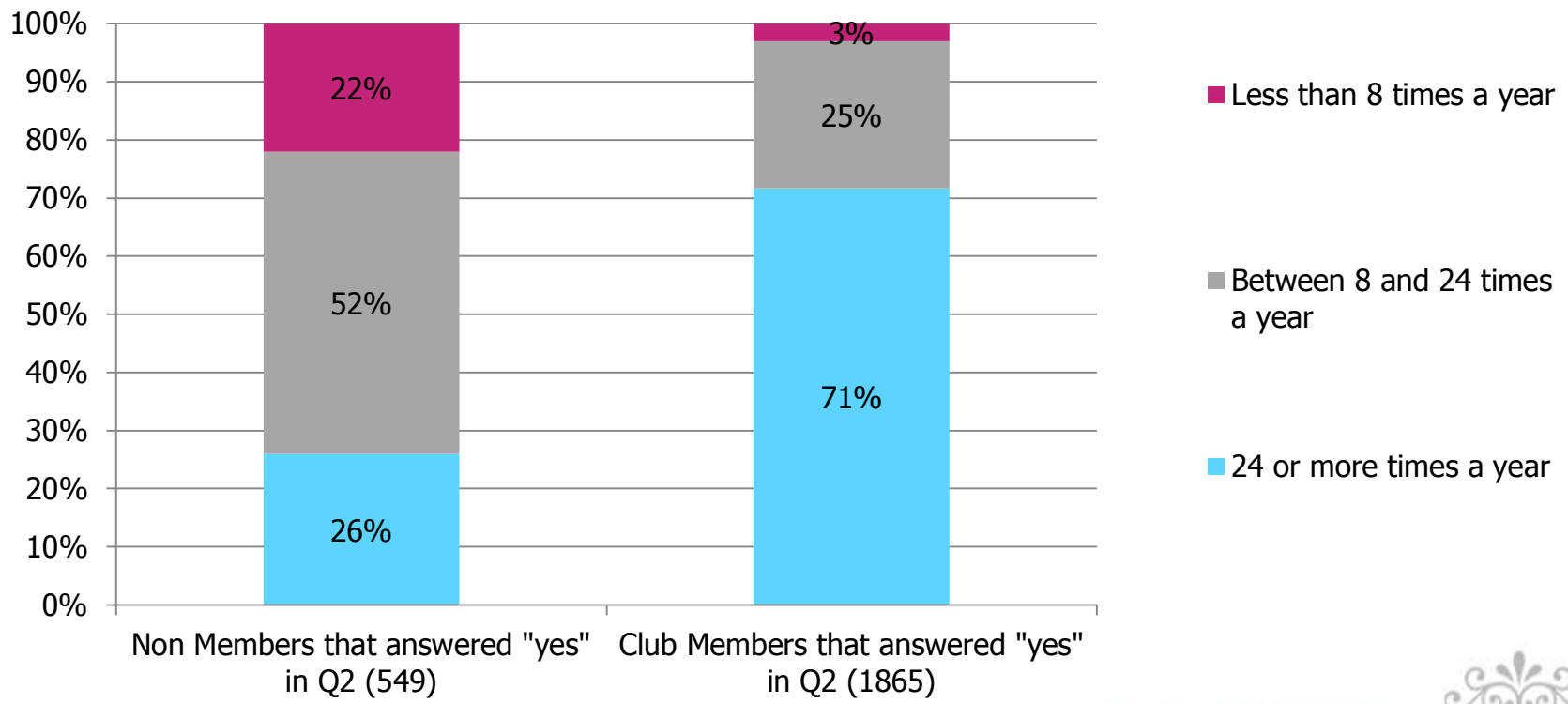
Q2. Do you still play golf?



Golfing Habits – Non Members

Non members play golf **less frequently**, on average 2 times or less a month, when compared with club members

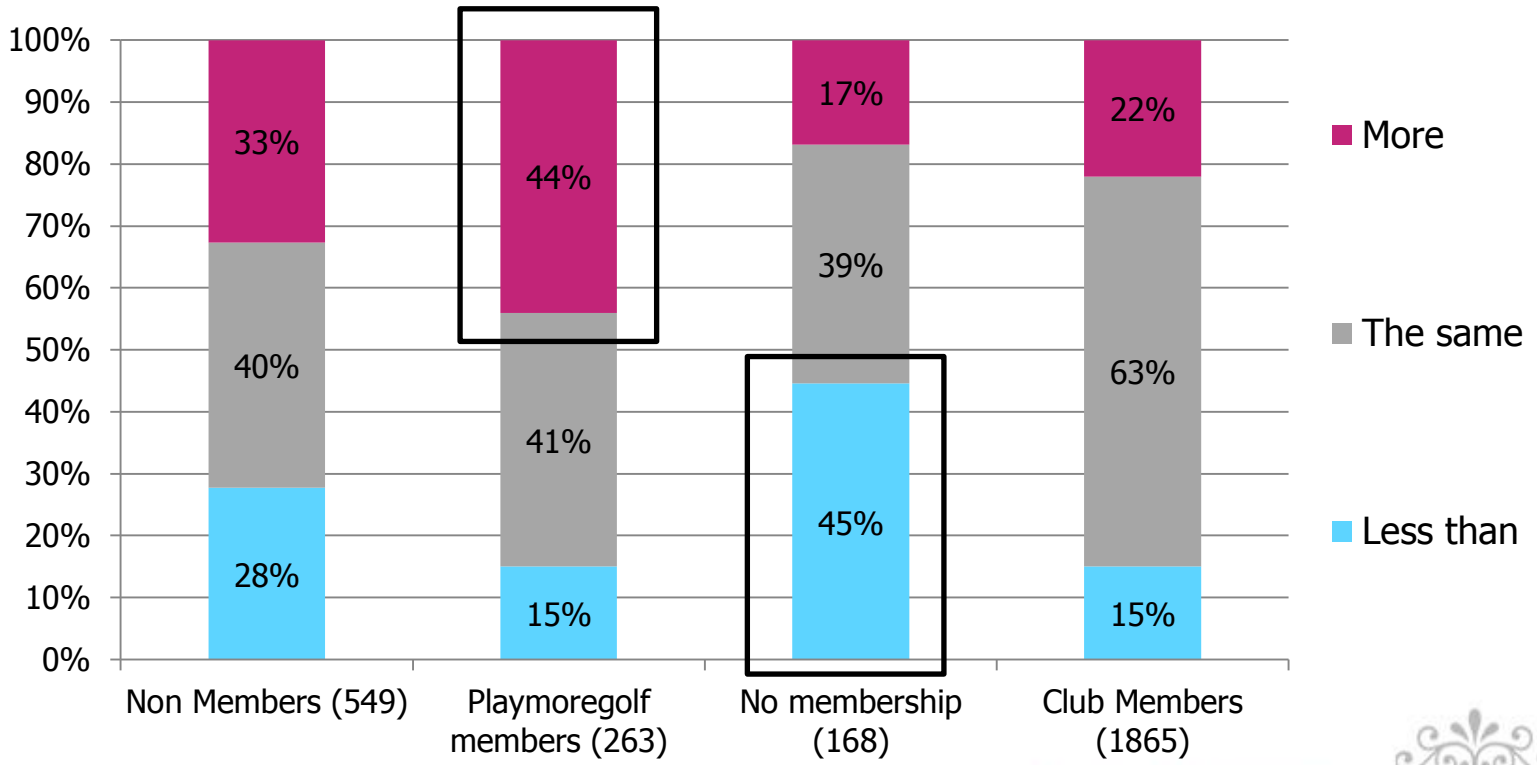
Q3. How often do you play golf?



Golfing Habits – Non Members

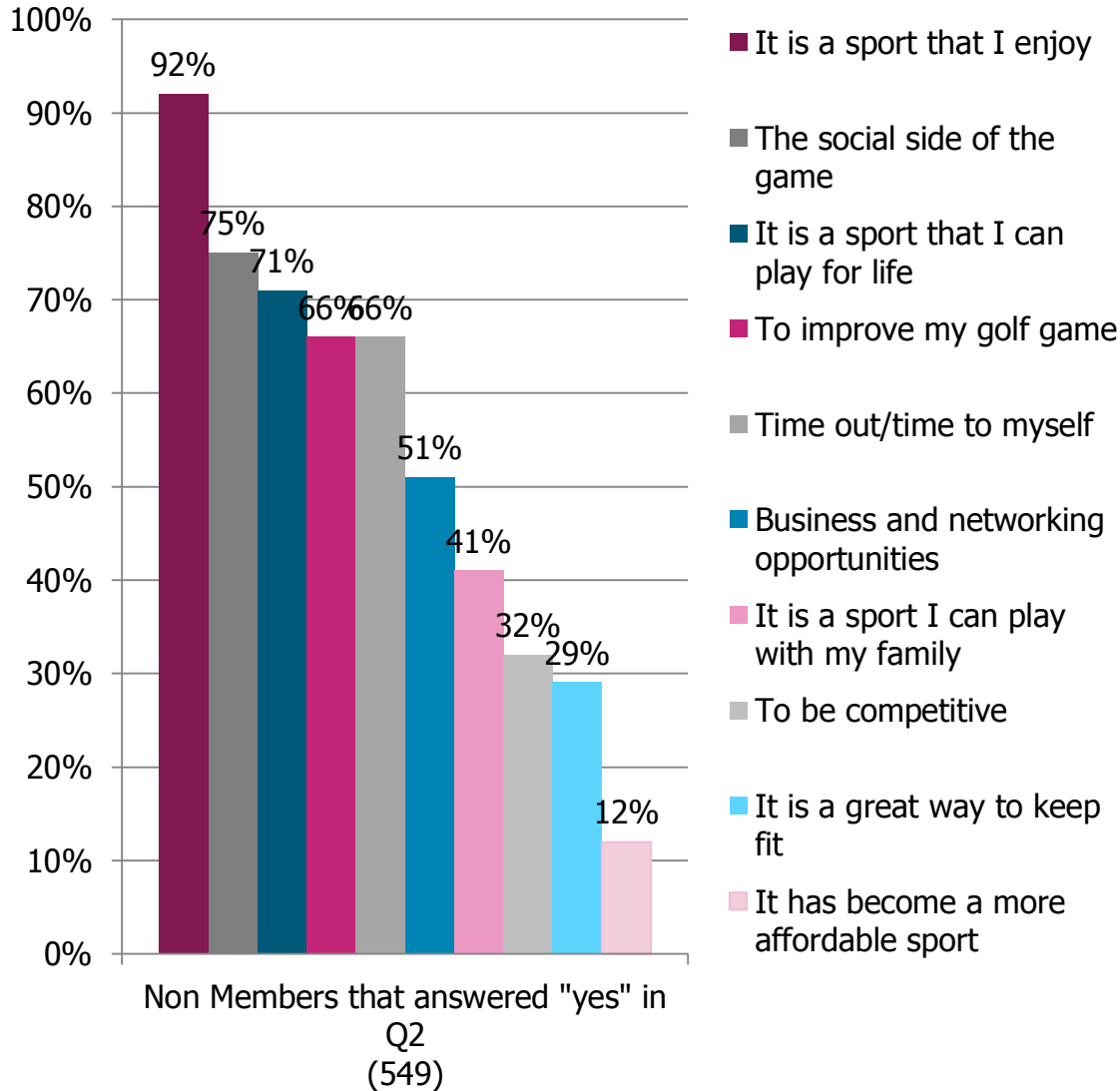
A significant portion of **Playmoregolf** members are playing **more golf than before**, whereas a significant portion of people with **no membership** are playing **less than before**

Q4. How does this compare to the last 2-5 years?



Golfing Habits – Non Members

Q5. Mark all the reasons you play golf



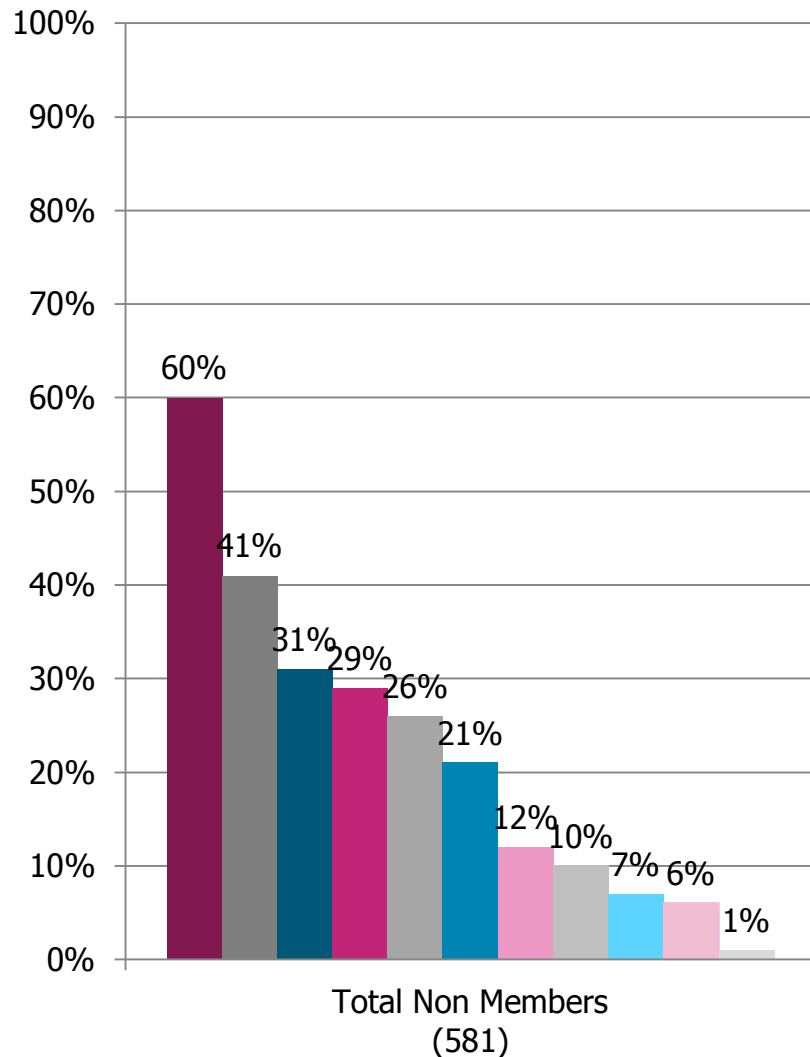
As with club members, reasons for playing golf centre around **enjoyment, sociability, game for life, improvement of their game** and **time out for themselves**

Golfing Habits – Non Members

Q6. Mark all that stops you from playing golf / playing more often



The **COST** of the **rounds** and **equipment and apparel** appear to represent the biggest barriers



- The cost of the rounds
- The ongoing cost of equipment and apparel

- The time it takes from spending time with my family
- The additional costs on a golfing day - socialising/food and drinks
- The time it takes to complete a round
- I have other sports and activities that I like to spend time doing
- Golf is a difficult game and my game is not improving as quickly as I would like it to
- Not enough activities and facilities for the family (partner and/or kids) at my club
- I am looking for more variety in the courses that I can play as a member of a golf club
- I like to socialize in other places, away from the golf club
- The type of social environment at my previous club

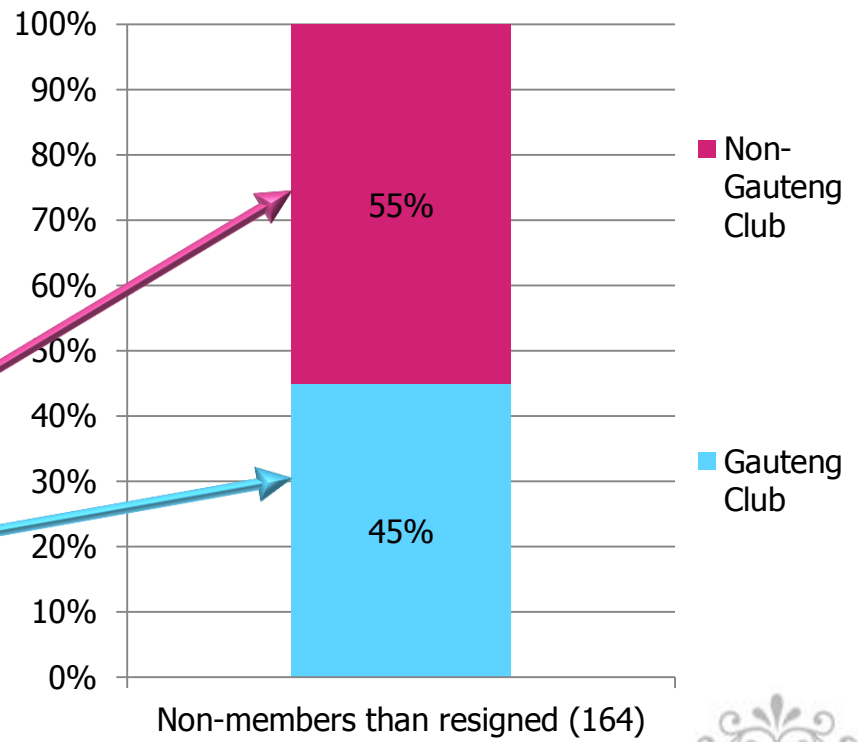
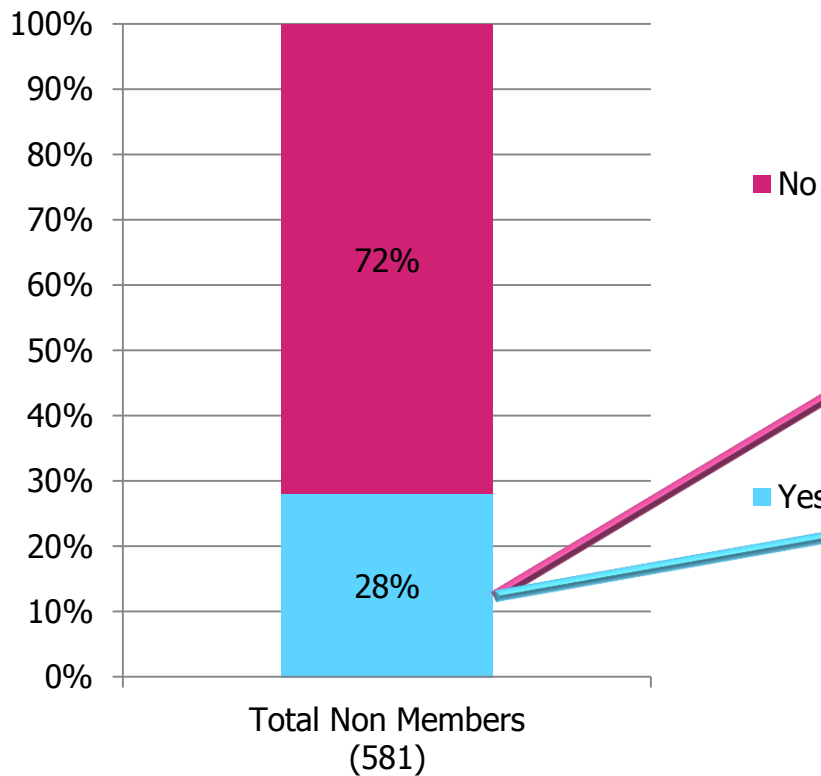
Golfing Membership – Non Members

Just under a third had resigned from a club in the past 2 years

Of which 45% was from Gauteng clubs

Q2. Resigned from a club in the past 2 years?

Q3a. Which club?

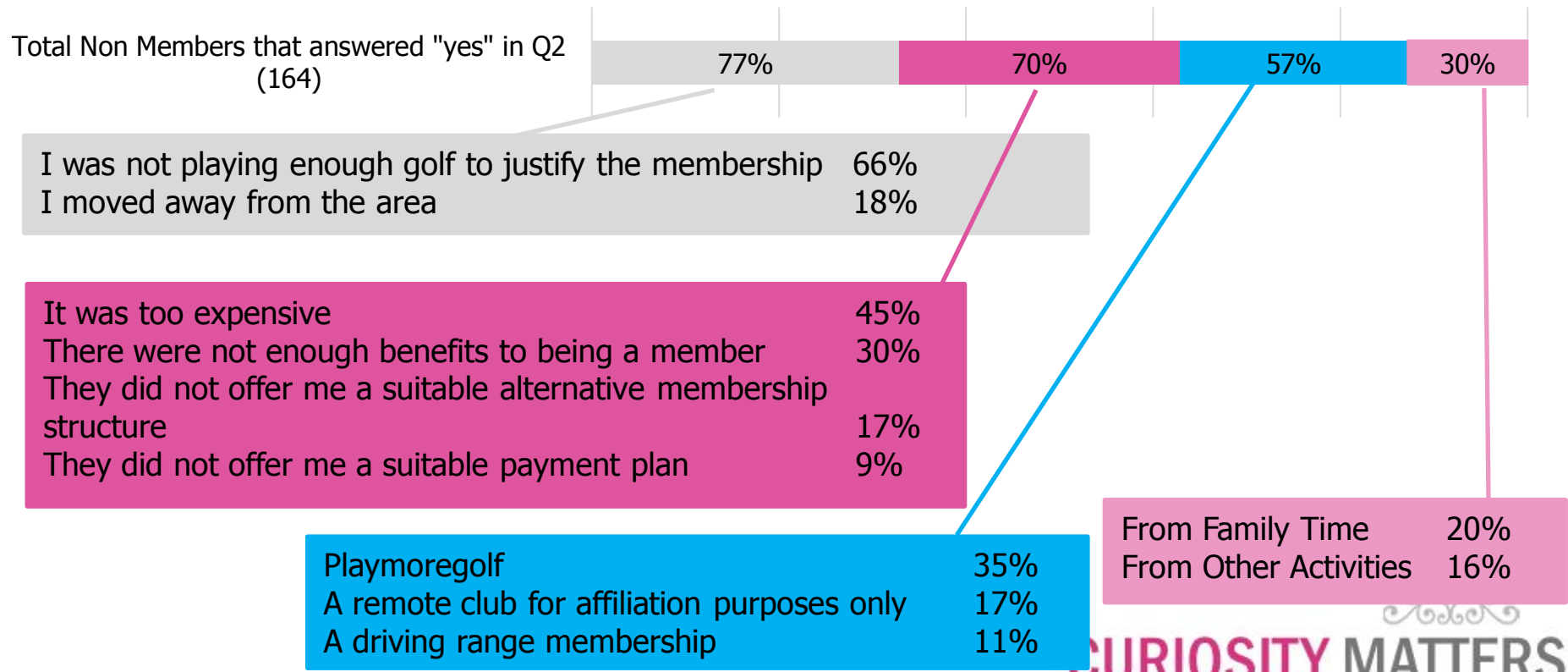


Golfing Habits – Non Members

Q3b. Mark all the reasons you resigned from the club

Key reasons for resignation include not playing enough golf to justify membership, cost, Playmoregolf a more relevant/attractive alternative, and not enough benefits being as member of a club

- OTHER REASONS
- I WAS UNSATISFIED WITH MY GOLF CLUB
- ANOTHER TYPE OF GOLF MEMBERSHIP WAS MORE RELEVANT OR ATTRACTIVE TO ME
- GOLF WAS TAKING TOO MUCH TIME



Golfing Habits – Non Members

Q5. Mark all the reasons why you are not a member of a golf club?



Reasons for not being a member are similar to reasons for resignation from a club – **COST, TIME, PERCEIVED VALUE/APPEAL and VARIETY**

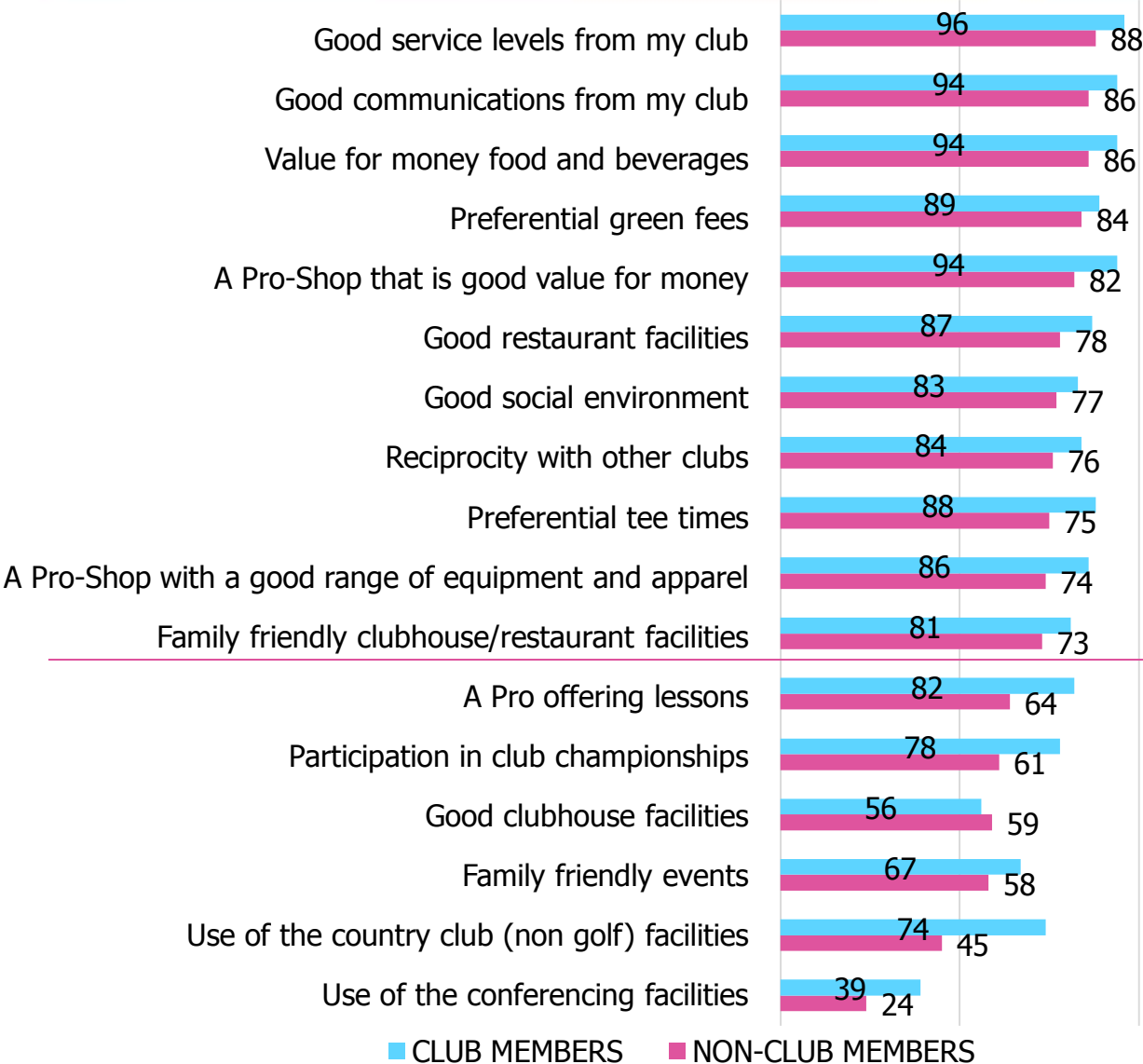
Total Non Members that answered "No" in Q1 and Q2	TOTAL (417)
OTHER REASONS	89%
It is too expensive	57%
I do not play enough golf to justify the membership	47%
I prefer variety and don't want to be associated with just one club	40%
There are not enough benefits to being a member	32%
A lack of family friendly facilities at golf clubs	10%
Too many rules and traditions	7%
I spend more time on other sports	5%
I do not like the social atmosphere of golf clubs	4%
I do not have a golf club in my area	2%
Too few rules and traditions	0%
ANOTHER TYPE OF GOLF MEMBERSHIP IS MORE RELEVANT OR ATTRACTIVE TO ME	83%
Playmoregolf	57%
World of Golf	27%
A remote club for affiliation purposes only	19%
A driving range membership	14%
GOLF TAKES TOO MUCH TIME	39%
From family time	29%
From other activities	16%

Importance of Different Club Membership Benefits

Ranking



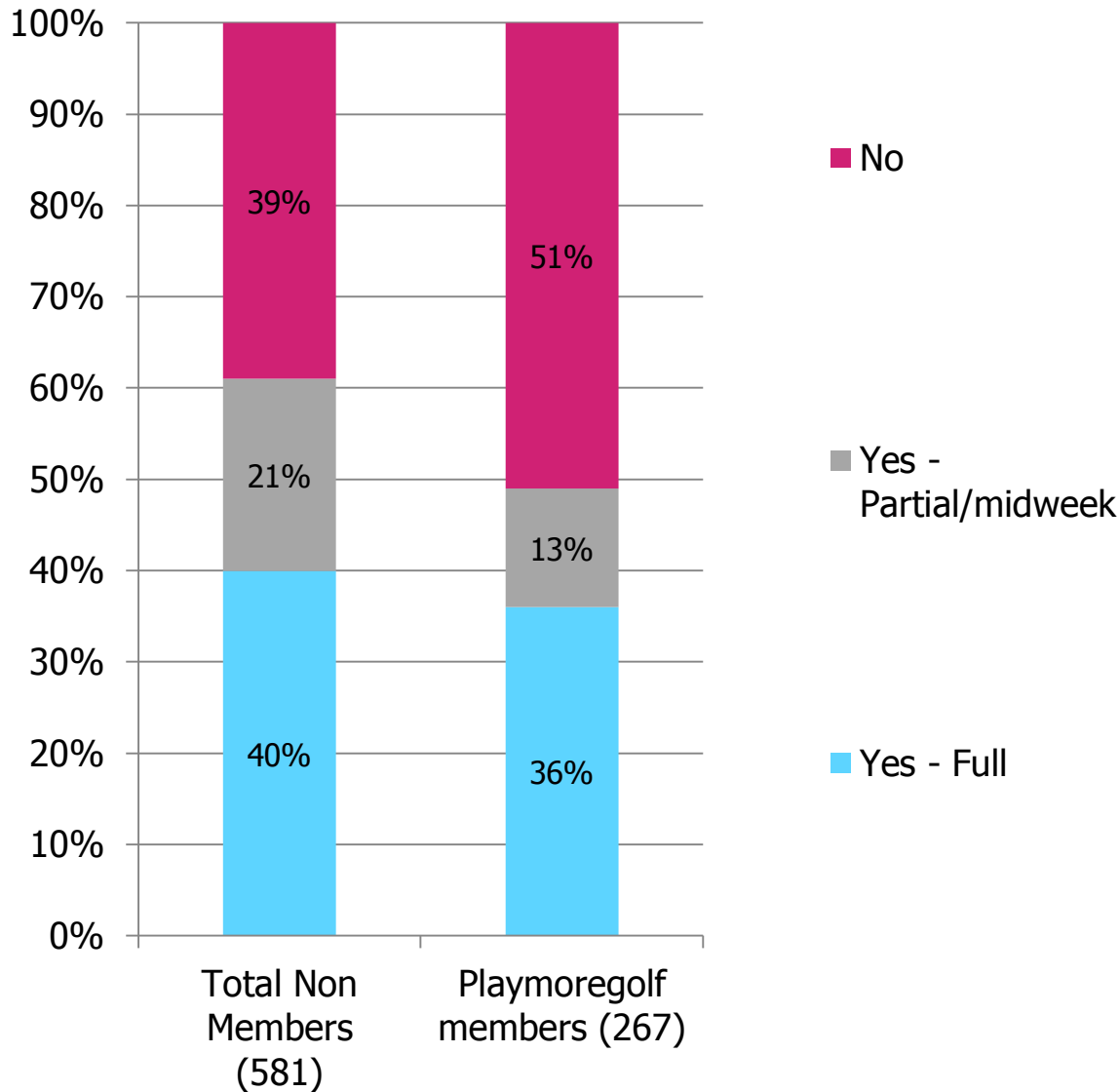
% Top 2 Box



Non Members	Club Members
1	1
5	2
2	4
3	3
4	5
9	6
6	7
10	10
8	8
7	9
12	11
11	13
13	12
16	14
15	16
14	15
17	17

Golfing Habits – Non Members

Q14. Do you intend on taking out a golf membership at a club in the future?



61% of non-club members are intending to take out a golf membership in the future.

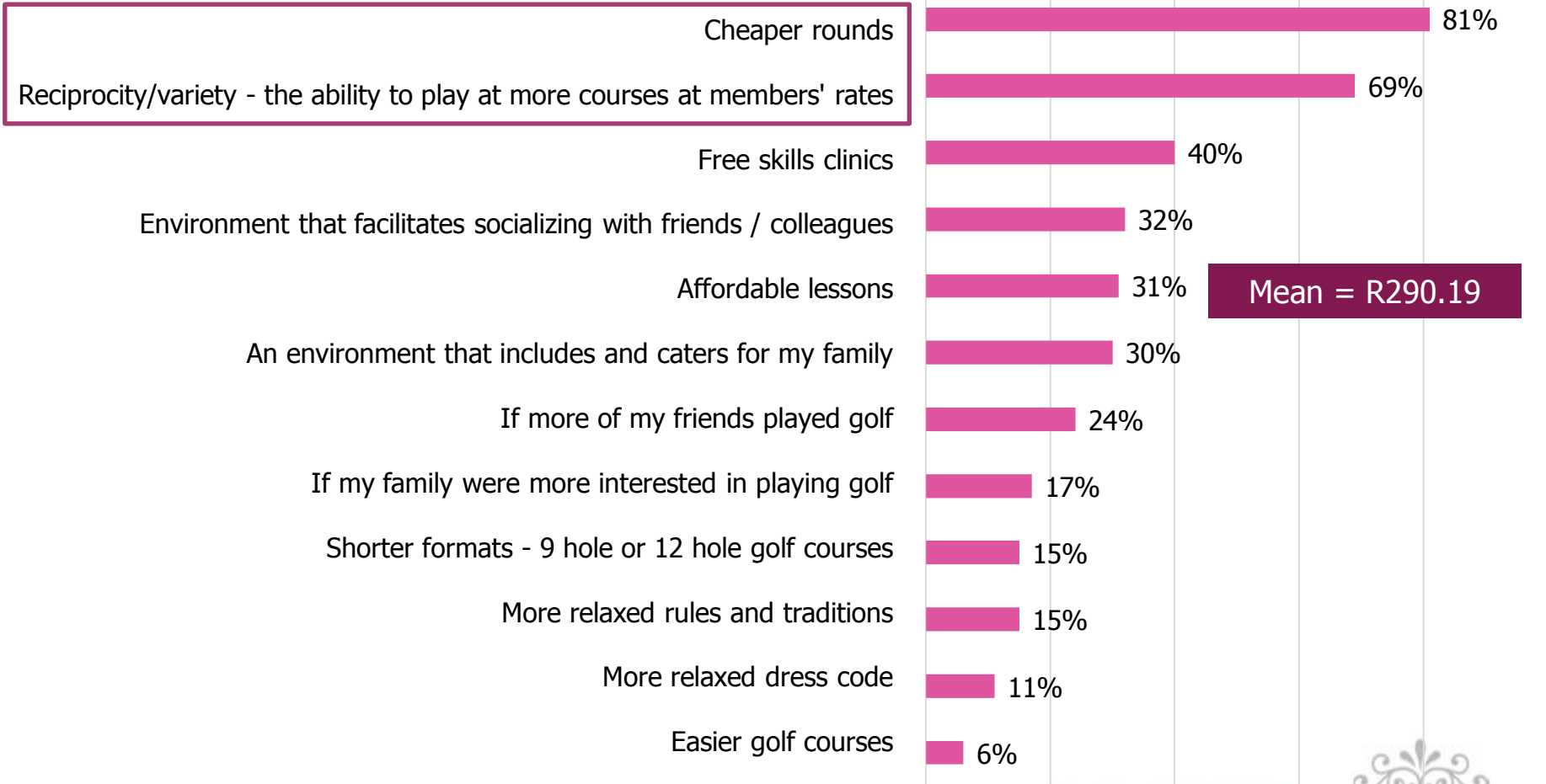
Amongst Playmoregolf members specifically, 49% are planning to take out golf membership.

Golfing Membership – Non Members

Q15. Mark which of the following, if any, would motivate you to take out golf membership at a club?



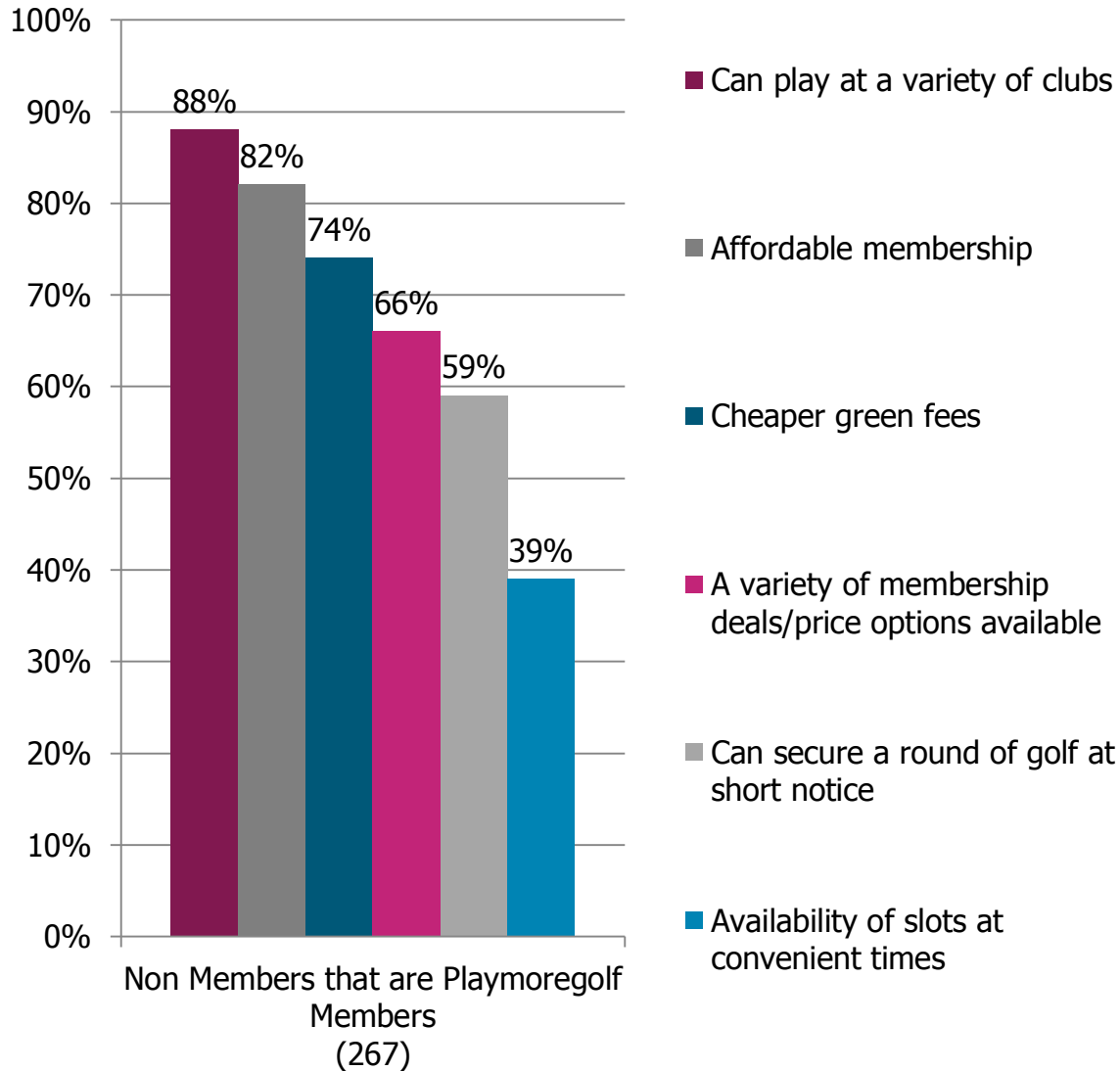
COST of rounds and **VARIETY** are by far the most compelling triggers to club membership



Total Non Members (581)

Golfing Habits – Non Members

Q21. What makes a Playmoregolf membership more attractive than a golf club membership?

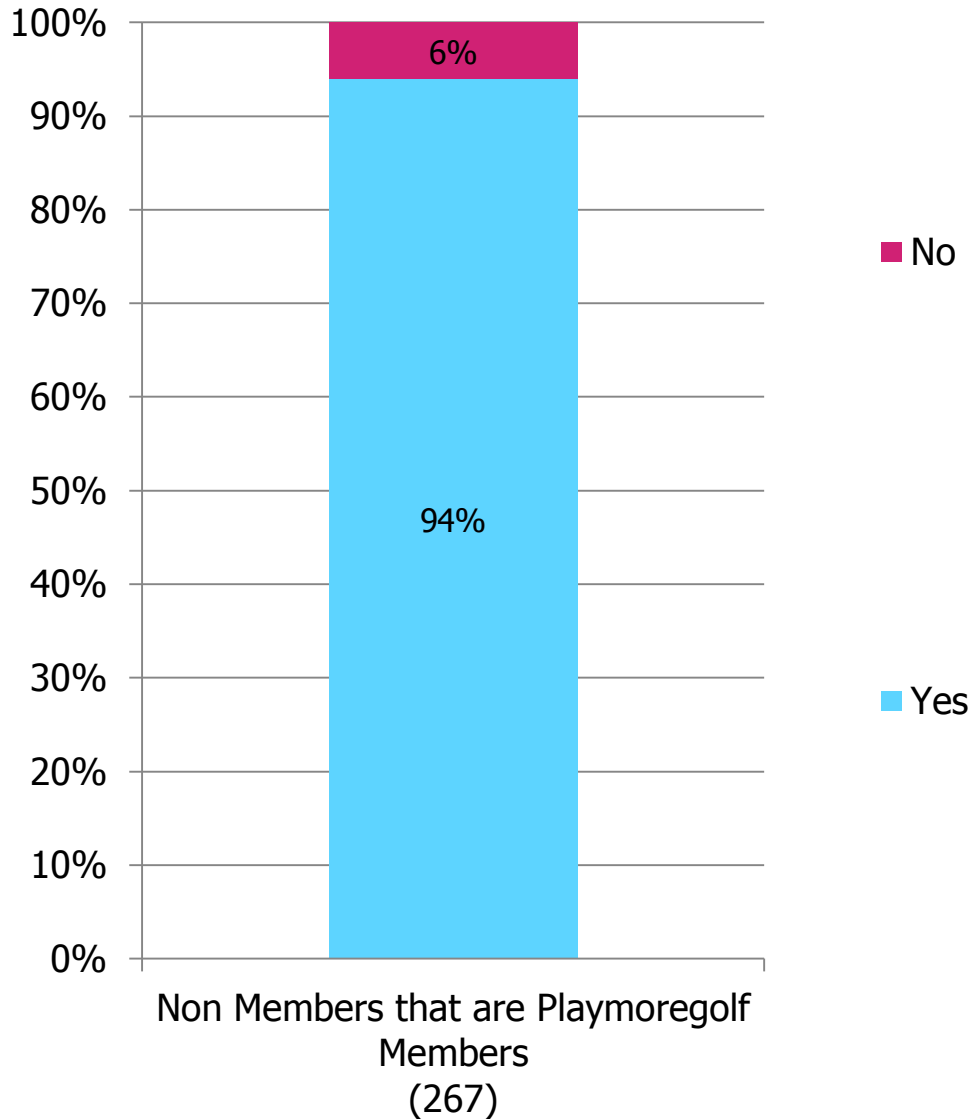


For Playmoregolf members there are a number of benefits of Playmoregolf over golf club membership, including playing at a **variety** of clubs, **affordable** membership, **cheaper green fees**, a **variety** of membership deals and price options available, as well as being able to secure a round of golf at **short notice**

Playmoregolf is meeting the consumer's needs for **AFFORDABLE COST, VARIETY AND CONVENIENCE**

Golfing Membership – Non Members

Q22. Will you renew your Playmoregolf membership again?



Playmoregolf is **meeting modern day golf consumer needs** by providing an affordable, flexible golf offering which is **attracting new golfers, retaining golfers**, in spite of the costs and time associated with golf, and **providing the potential to convert** Playmoregolfers into club members

By far the majority of Playmoregolf members are planning to renew their golf membership again.

49% also intend taking out golf club membership in the future. This means that 43% are planning both. This represents a significant opportunity for clubs to convert Playmoregolf members to golf club membership



KEY LEARNINGS AND CONCLUSIONS

Key Learnings



DEMOGRAPHICS

Demographically, non-club members appear to be **YOUNGER**, more **RACIALLY DIVERSE** and have families that are younger. Club members typically appear to be more **MALE**, **WHITE** and skewed to an **OLDER** age group, with older children



TRIGGERS

Golf is played for the **same reasons** by both club members and non members – **enjoyment, sociability** and **a game that can be played for life**



BARRIERS

The biggest **barriers to golf** appear to be **TIME** (to play a round, away from family) and **COST** (the round, equipment and apparel, social aspect)



SATISFACTION WITH BENEFITS

Overall **satisfaction** with club membership appears to be **relatively low**, with only 55% of members expressing satisfaction with benefits. Of particular mention are benefits such as clubhouse facilities (including locker rooms and halfway house), levels of service, club management, value for money offerings, condition of the course, and reciprocity with other clubs. However, there were **relatively few suggestions for additional benefits** that could be offered to increase membership satisfaction, which appears to indicate **a need to focus on key passport factors** to ensure retention of membership

Key Learnings (2)



FREQUENCY AND PATTERNS OF PLAY

Non club members tend to play less frequently than club members, however, 81% of Playmoregolfers indicate that they play more or the same, compared with the last 2-5 years, and club members tend to also be playing a similar amount of golf than before



PLAYMOREGOLF IS MEETING CHANGING GOLFER NEEDS

Consumer needs are changing, and the non club golfer is looking for **VARIETY**, **CONVENIENCE**, and **AFFORDABILITY**. Playmoregolf has created an offering that is meeting this consumer need by offering the ability to play at a variety of clubs, with affordable membership, cheaper green fees, variety of memberships deal/price options available and the convenience of being able to secure a round of golf at short notice



PLAYMOREGOLF IS BOTH ATTRACTING AND RETAINING GOLFERS

The majority of Playmoregolfers indicated that they would **renew their memberships**. In addition, a significant number indicated an intention to take out golf club membership in the future. Playmoregolf therefore appears to be playing a role of **attracting new golfers into the game**, but also **potentially creating a bridge into club membership**

What needs to be addressed?

1

Golf clubs need to develop strategies to attract a younger and more racial and gender diverse membership base

From a positive point of view, this indicates that there is a source of club membership that has not yet reached its full potential. However, the following needs to be considered:

- The culture of golf in general, and golf clubs needs to be interrogated to ensure that the environment is appealing to younger, female and racially/culturally diverse potential members
- Membership offerings available and facilities need to cater to the younger (including younger families) and more diverse golfer

2

Back to basics – focus on delivering on the benefits that are already on offer to retain current members and increase appeal to non members

There is an inadequate level of satisfaction with current benefits, which are still considered to be important to the club member

- Address each one of the benefits and services to provide the very best possible offering – if the services and facilities can be improved, this is advisable, however, where this is not viable, these services and facilities should be exploited to their full potential
- Consider innovative ways of leveraging current services and facilities to increase appeal to the changing needs of the current and potential new member

What needs to be addressed (2)?

3

Create a **VALUE PROPOSITION** that will retain current members, but appeal to changing consumer needs

The consumer is looking for affordability/perceived value for money, convenience, speed and variety in offering (reciprocity in particular):

- Create an offering that addresses these needs – leverage, adapt and innovate where possible
- Have a clear offering with consumer driven benefits that can be marketed to the consumer – not all consumers are the same, and not all golf clubs should be marketing the exact same offering
- Clubs should work together to address reciprocity, to meet the modern golfer's need, and benefit the club community as a whole
- Do not fall into the trap of selling cut-price rounds for short term gains – although golfers are looking for cheaper rounds and a cheaper experience, the focus needs to instead be on providing a **VALUE FOR MONEY** experience and offering, and rewarding loyalty through incentivising. **A price war simply commoditises the game, drives down the value, and creates an unsustainable market environment**

What needs to be addressed (3)?

4

Embrace Playmoregolf as a key element in the golf membership funnel and collaborate for the health and long term sustainability of the game of golf

Playmoregolf attracts and retains new golfers and provides a market of new (younger and diverse) golfers that may be open to club membership. In addition, Playmoregolf provides an alternative to those who are dissatisfied with club membership, ensuring that they are not lost from the game of golf

- Golf clubs need to provide a value proposition that will attract Playmoregolfers into membership. If the golf clubs do not provide motivation or an attractive environment for membership, switching is less likely
- Once Playmoregolfers are converted into membership, clubs need to focus on creating strategies to encourage increased frequency of play

5

Playmoregolf and clubs need to work together to preserve the value and sustainability of the game of golf

Short term financial wins gained by buying and selling cheap rounds will damage the sustainability of clubs, and golf, in the long term, by driving down the value of the game

- Playmoregolfers should not be paying less to play at a club than full paying club members
- Clubs need to calculate a break-even cost per round that will ensure that they are not taking a loss on the sale of rounds



CURIOSITYMATTERS

Carol Stewart

Research provider

+27 (0)73 713 6074
carol@curiositym.co.za

Postal Address

PO Box 655, Glenvista
Johannesburg, South Africa, 2058

Sandra Vieira

Research provider

+27 (0)82 896 1783
sandra@curiositym.co.za

Physical address

Unit 4 Montana, 32 Swartberg Rd, Glenvista
Johannesburg, South Africa, 2058