



UK Participation Study : GOLF ACTIVES

STUDY TO UNCOVER THE NUMBER OF GOLF ACTIVES IN THE UK – PLAYERS INVOLVED IN SOME FORM OF THE GAME

Introduction



STUDY TO UNCOVER THE NUMBER OF GOLF ACTIVES IN THE UK

INCLUDING PLAY ON:

FULL LENGTH COURSE

DRIVING RANGE

9 HOLE COURSE

ADVENTURE GOLF

PITCH & PUTT

GOLF COMPUTER GAMES

PUTTING GREEN

PAR 3 / SHORT COURSE

GOLF SIMULATOR

SCHOOL

OTHER

STUDY TO UNCOVER THE NUMBER OF GOLF ACTIVES IN THE UK

- Golf Player studies have traditionally assessed golf participation by analysis of play on full length golf courses and other more established forms of golf
- Forms of golf such as Par 3, pitch & putt, driving range, adventure golf and even e-gaming have not been included
- Traditional golf participation numbers in the UK have been showing a steady decline over the last 10 years – but this does not reflect emerging formats and new forms of play opportunities or consumption
- The European Tour commissioned a study undertaken by SPORTS MARKETING SURVEYS Inc. to establish a complete picture of golf activity in the UK including digital and other less traditional forms of the game



OVERVIEW

- With an increase in the different kinds of golf available, the appeal of the sport has widened
 - Full length golf course use now represents a core section of the UK golf market rather than the definition
- While the golf courses continue to be dominated by older males, the wider definition of golf uncovers a greater variety of golfer types
 - Women and younger people have a strong presence
 - Faster forms of golf allow more involvement by people with work and family commitments



OVERVIEW

- The wider definition of “Golf Actives” leads to a total UK adult golfer figure of **9.3 million** adults
 - Of these, only 3.5 million are full length golf course users
- There are a further **1.7 million** junior golfers
- This creates an unique opportunity to change perceptions by including and promoting the wider forms of golf and illustrating how these formats can fit in much more easily with everyday life
 - Encouraging Golf Actives to be involved over a shorter time frame, and at non-traditional venues – whilst acting as the stimulus to trial and embrace the full-length golf course experience
 - For The European Tour, this represents a more rounded assessment of our audience than traditional participation measures



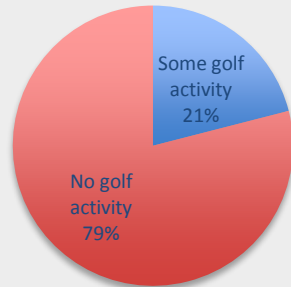
SUMMARY : GOLF ACTIVES

- Using the broader participation definition, just over **a fifth** of the UK population had engaged with some form of golf over the last 12 months;
 - For adults the most popular forms of golf were play on full length courses and driving ranges, while children were most likely to have been to adventure golf
- This equates to **9.3 million adults**, and a further **1.7 million juniors** in the UK
- The most frequent golf activity was seen amongst adults who had played full length golf courses or golf computer games
 - For juniors, golf computer games were the most frequently played
- As seen in other participation research, those playing full length courses were predominantly male, older, white and in the top socio-economic groups
- Those engaging in other golf activity (not full length courses) were far more reflective of the population as a whole
 - More likely to be female, younger and from a broader socio-economic background

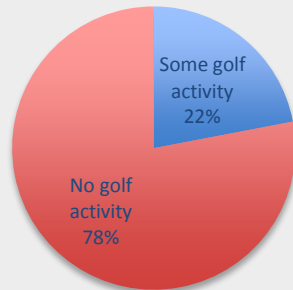


GOLF ACTIVITY : Types of Golf

Adults

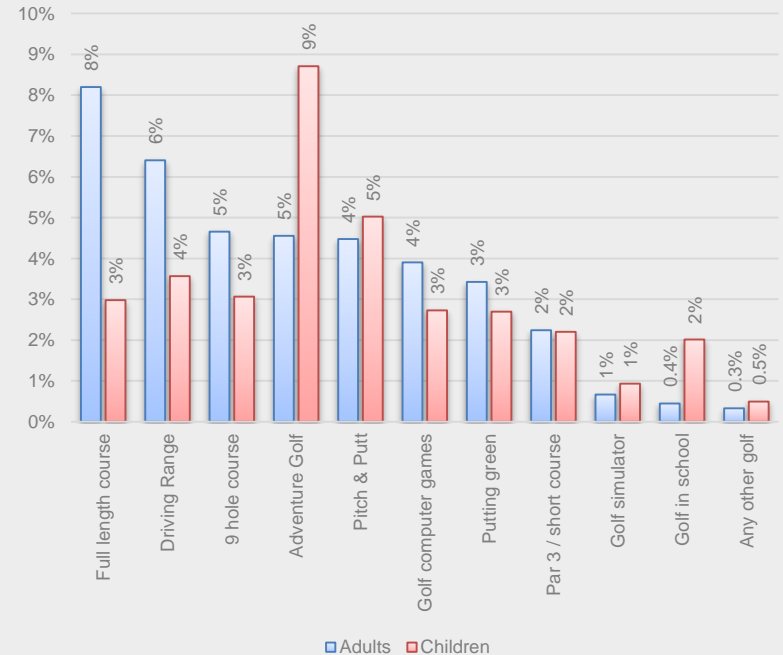


Children



Just over a fifth of the UK population had taken part in some form of golf activity in the last year.

For adults the most popular forms of golf were full length courses and the driving range, while children were most likely to have been to adventure golf



To offset sample bias, involvement is counted if participation frequency is more than twice in the last year



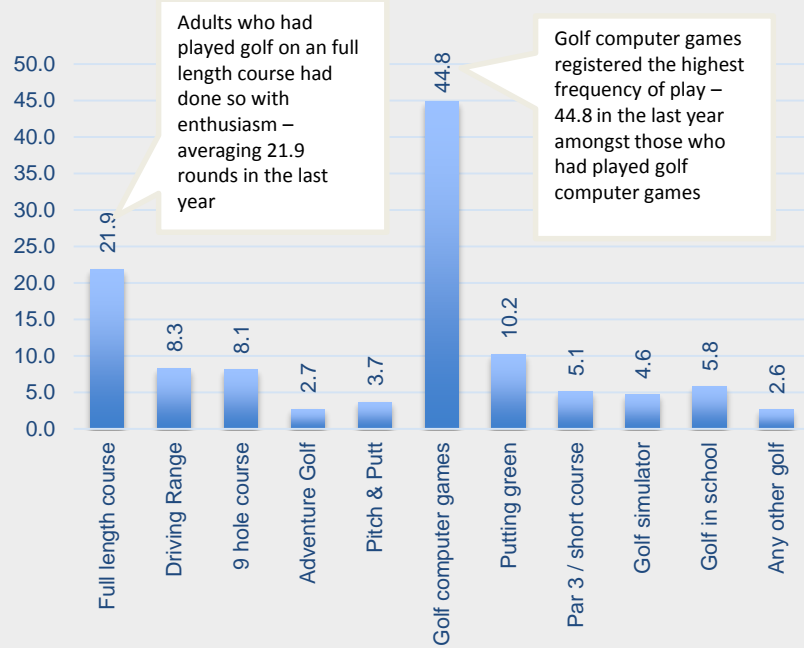
GOLF ACTIVITY : How Many People?



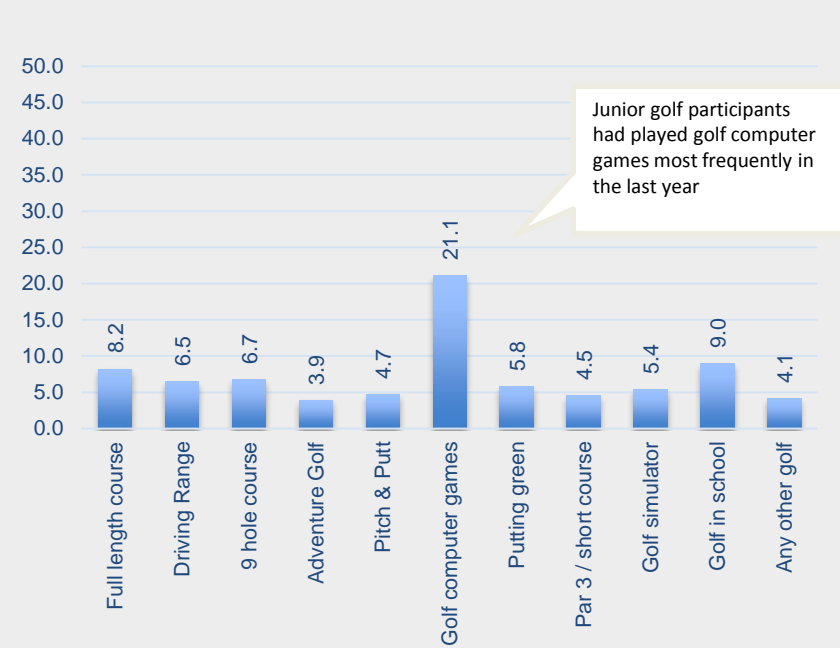
This graphic shows the absolute number of people who have taken part in each of the categories of golf in the past year, including the broader definition of golf activity

GOLF ACTIVITY : Frequency of Participation

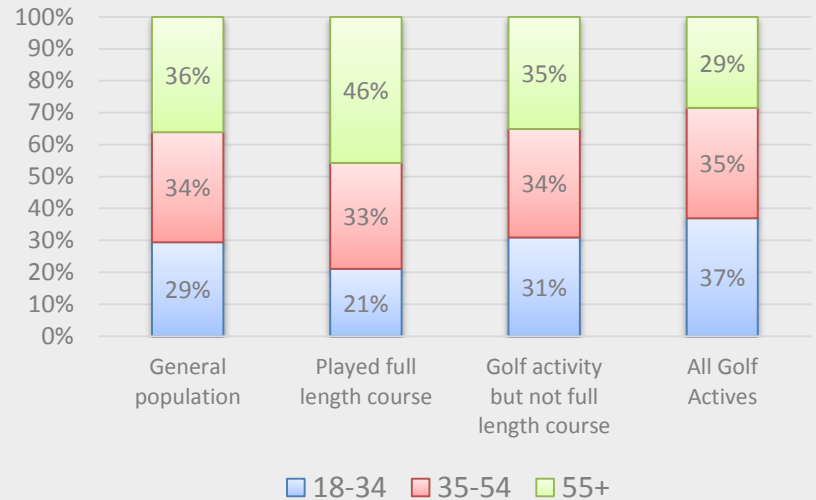
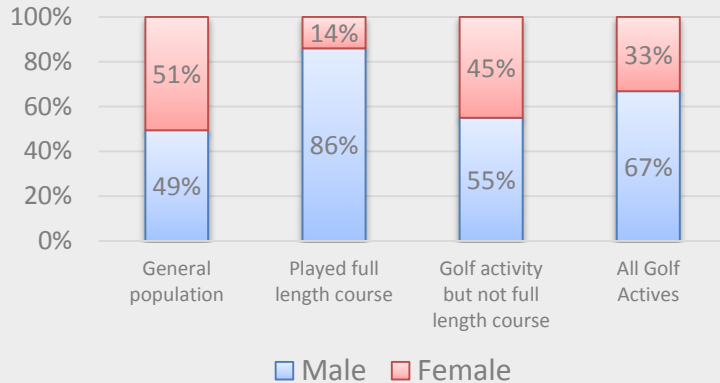
Adults



Children



GOLF ACTIVITY : Profiling

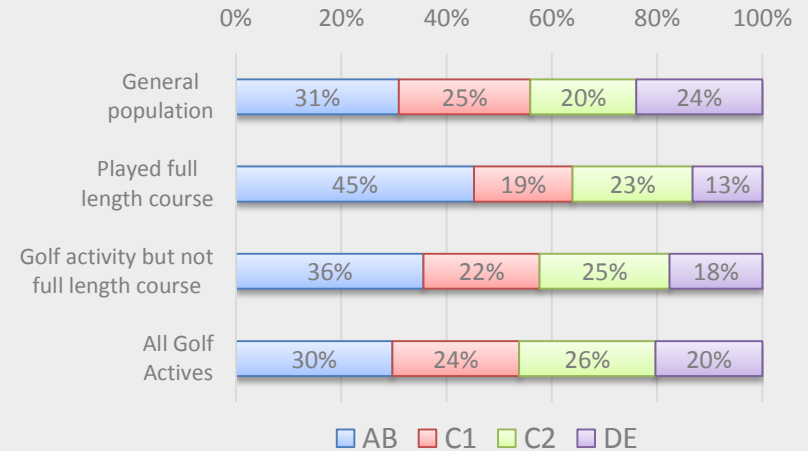
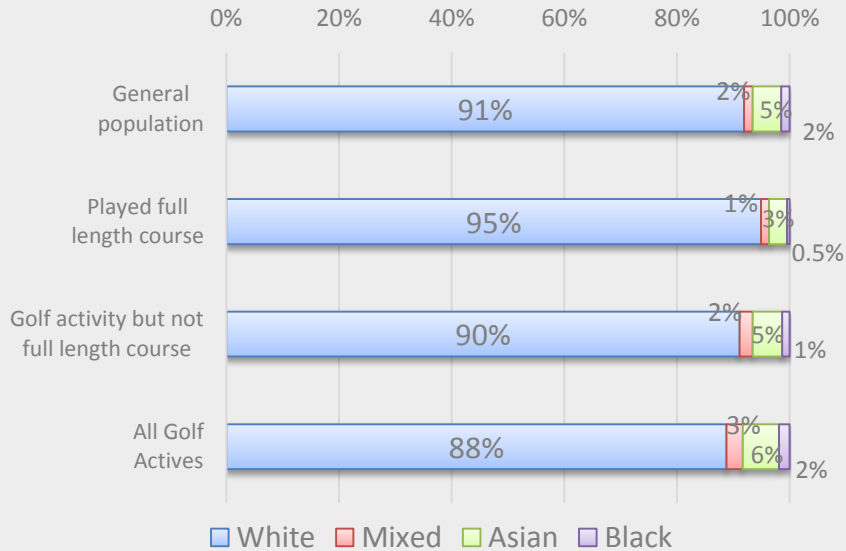


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All mentions of participation have been included in average frequency calculations

GOLF ACTIVITY : Profiling



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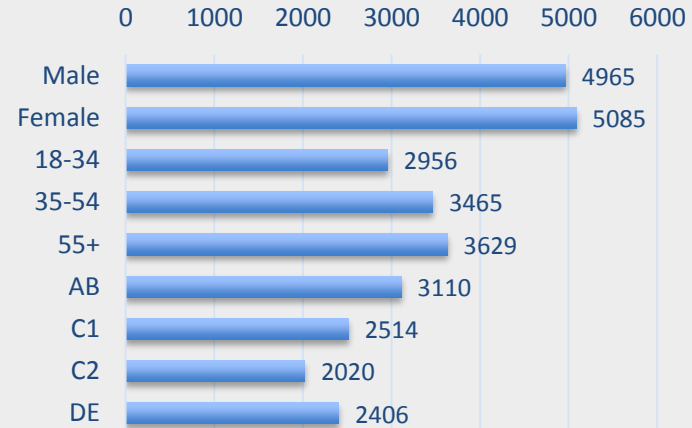


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METHODOLOGY

- 10,050 online interviews carried out in the UK
 - Fieldwork between the 5th June and the 6th July 2015
- Nationally representative survey of adults based on age (18-80), gender, region, socio-economic group and ethnicity
- Respondents asked about golf activity of 6-17 year old children in their household to give a view of junior participation
 - Survey results cover 10,050 adults and 3,226 children aged 6-17
- Extrapolations based on UK population with household internet access:
 - 43.1m 18-80 year olds
 - 7.8m 6-17 year olds

Number of interviews



To be included in the definition of 'Golf Actives', a person must have taken part in one of the following forms of golf at least twice in the last year:

- Full length course, driving range, 9 hole course, adventure golf, pitch & putt, golf computer games, putting green, par 3 / short course, golf simulator, school, other

SPORTS MARKETING SURVEYS INC.

ABOUT US

SPORTS MARKETING SURVEYS INC. is a specialist sports research company focusing on the sports participant and sports goods markets.

Established in 1984 with SPORTS MARKETING SURVEYS USA starting in 1999, and SPORTS MARKETING SURVEYS INC as an independent company in 2011

In the last two years, SPORTS MARKETING SURVEYS INC. and SPORTS MARKETING SURVEYS USA has completed research amongst over 250,000 respondents on sports participation in over 20 markets and covering over 100 sports

Research has been undertaken online or by telephone interviews on a nationally representative basis.

ABOUT OUR PARTNER

Our fieldwork provider for this European Tour “GOLF ACTIVES” study was founded in 1999 and now employs over 1,200 people in over 20 offices around the world

The company adheres to industry guidelines and is associated with many key industry bodies around the world

Most relevant for this study are the organisation’s affiliations to the Market Research Society (MRS) and ESOMAR





Thank you