

*"Scotland's game for everyone"*



Scottish  
Golf

# About Scottish Golf

To inspire a nation to love golf in all its forms and contribute to a healthier, inclusive and aspirational Scotland.

Purpose:

To promote, develop and govern golf for all generations and without barriers.

Strategic Objectives:

Playing the Game

Growing the Game

Improving Finances

Creating Champions

Staging Events

Governance & Leadership

Handicapping





# Industry Trends

An Overview of Key Industry Data



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# Introduction

Golf as a game is evolving and the way people choose to enjoy it is changing. Understanding the key data affecting golf can help clubs make more informed decisions about what they offer their current and future customers. In this resource we present some key data from reliable industry sources to help clubs understand current industry and consumer trends, facts and figures.

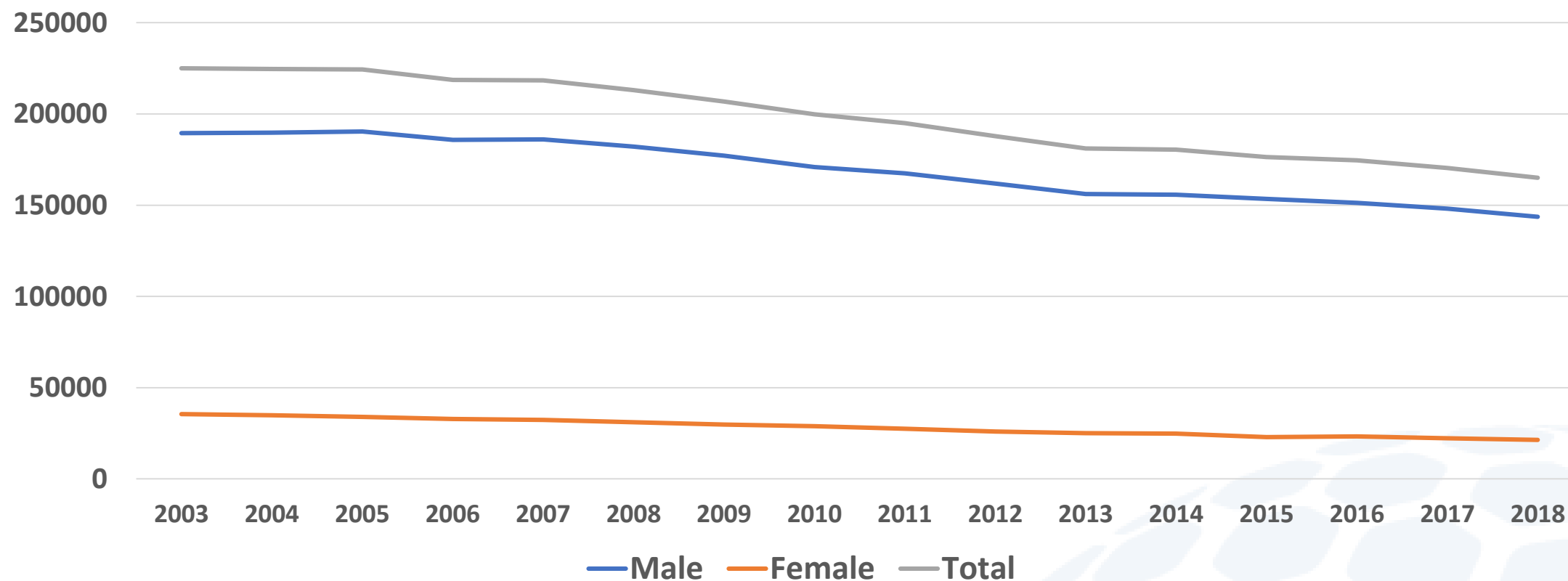
This should help clubs recognise the need for change and provide some key stats to base proposals on that often need to be endorsed by others.



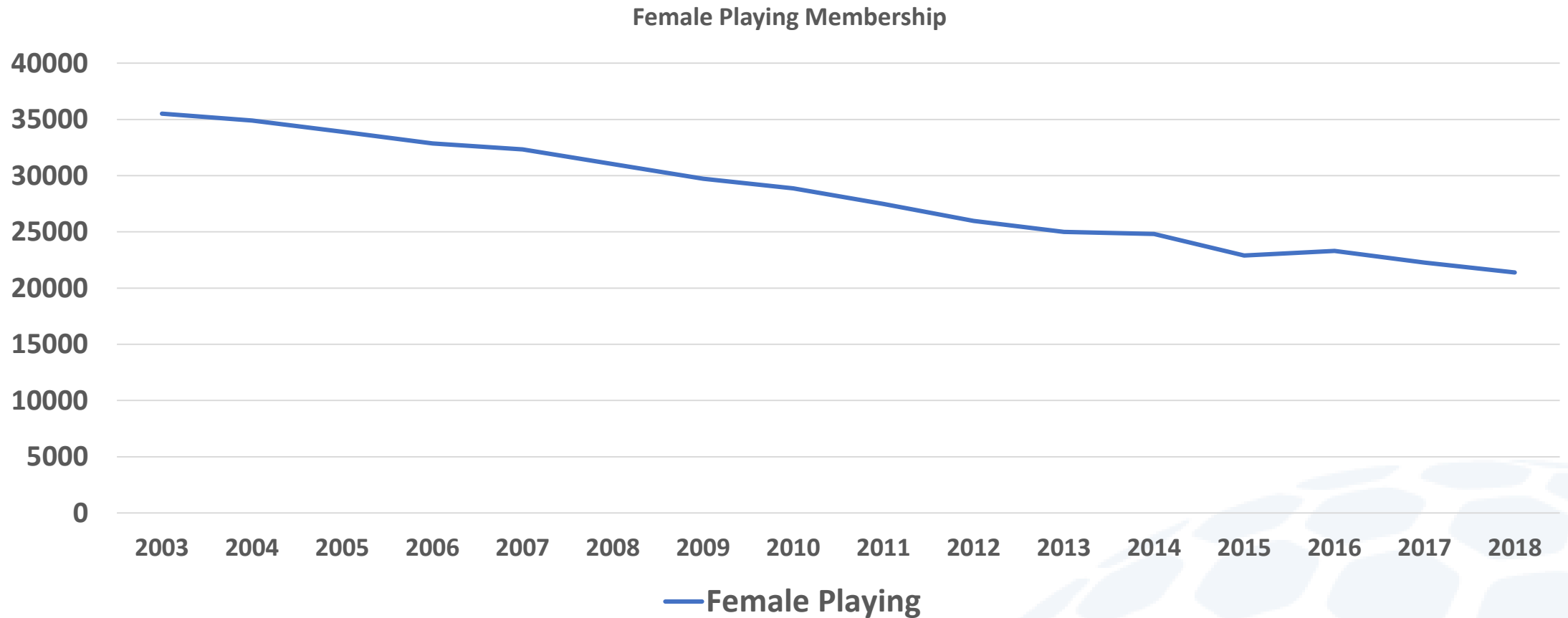
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# Adult Playing Membership Trends

Scottish Golf Adult Playing Membership 2003-2018

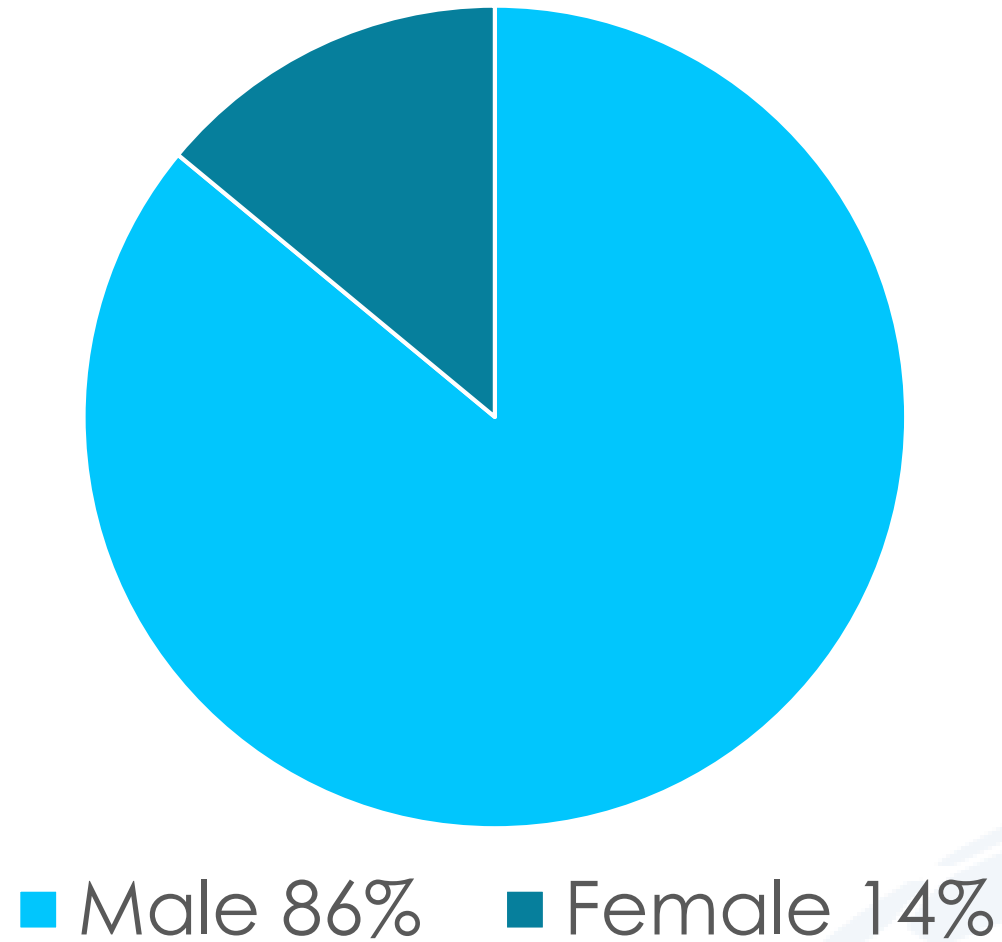


# Adult Female Playing Membership Trends

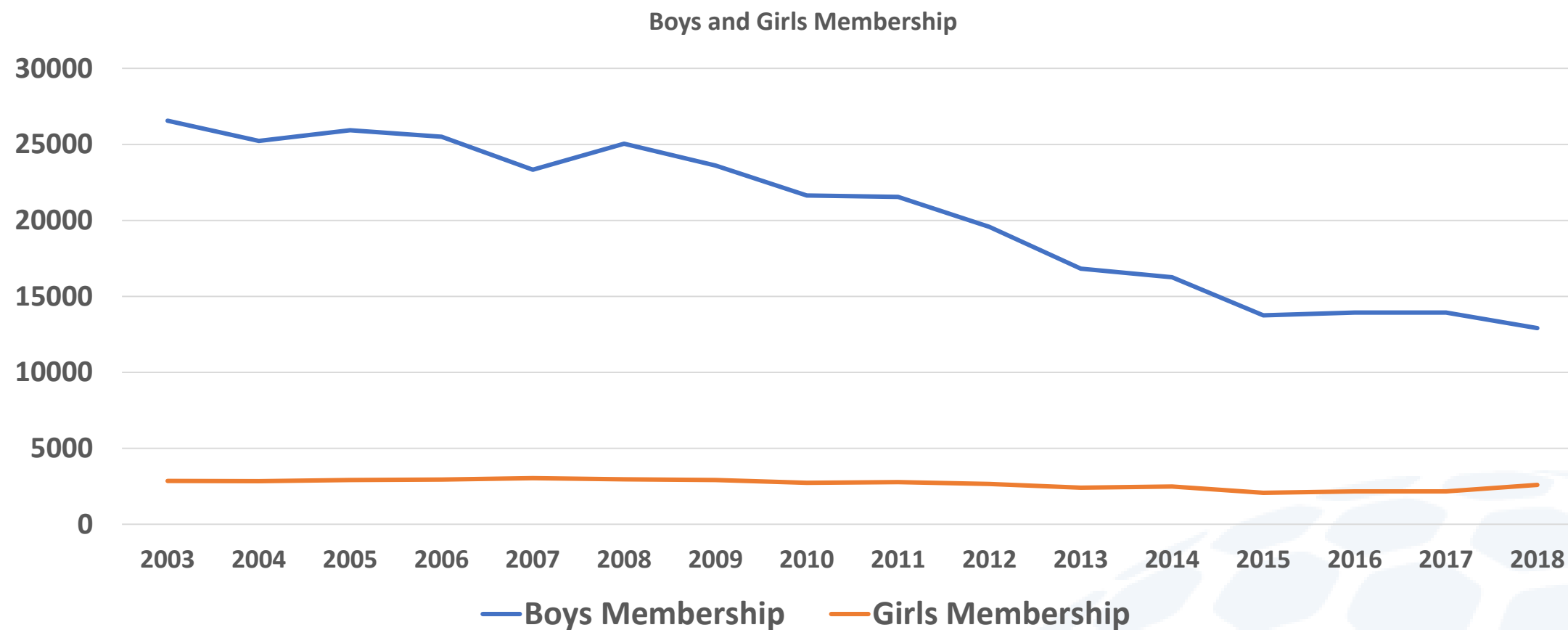




# Gender Split of Members 2018 (all)



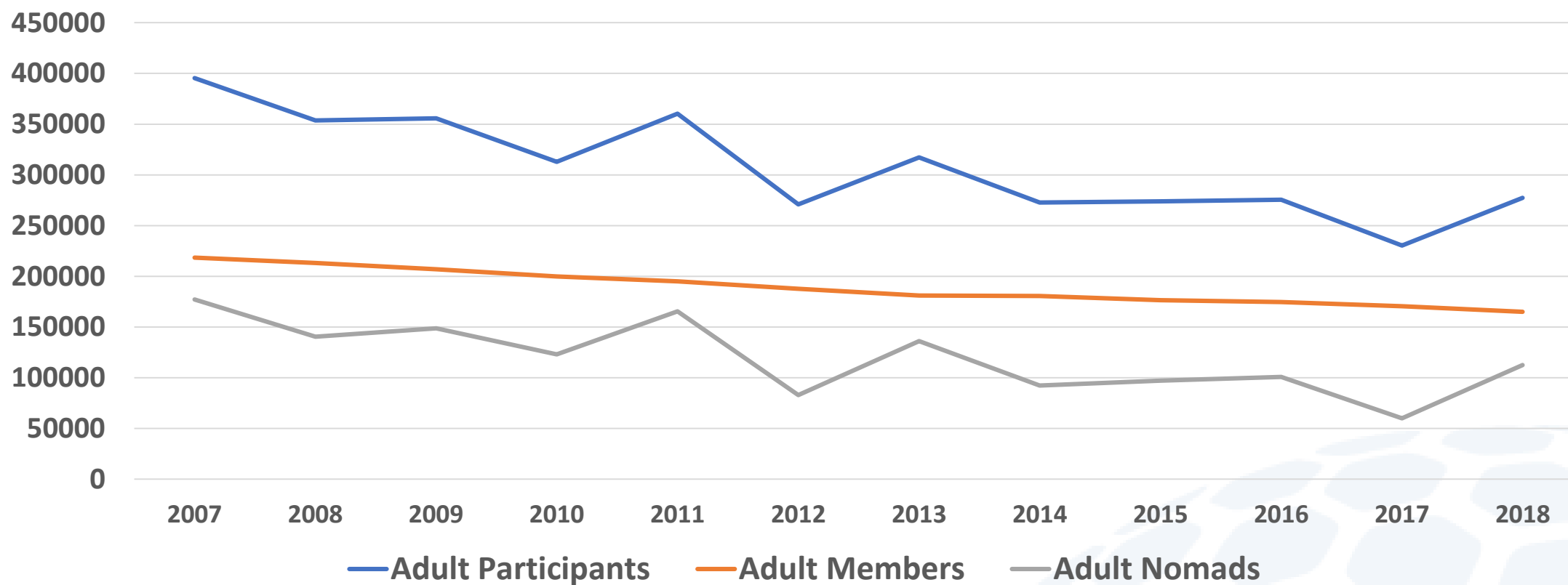
# Junior Membership Trends – Boys & Girls





# Overall Participation vs Membership

Adult Participation vs Membership



# Average Age of Club Members in Scotland



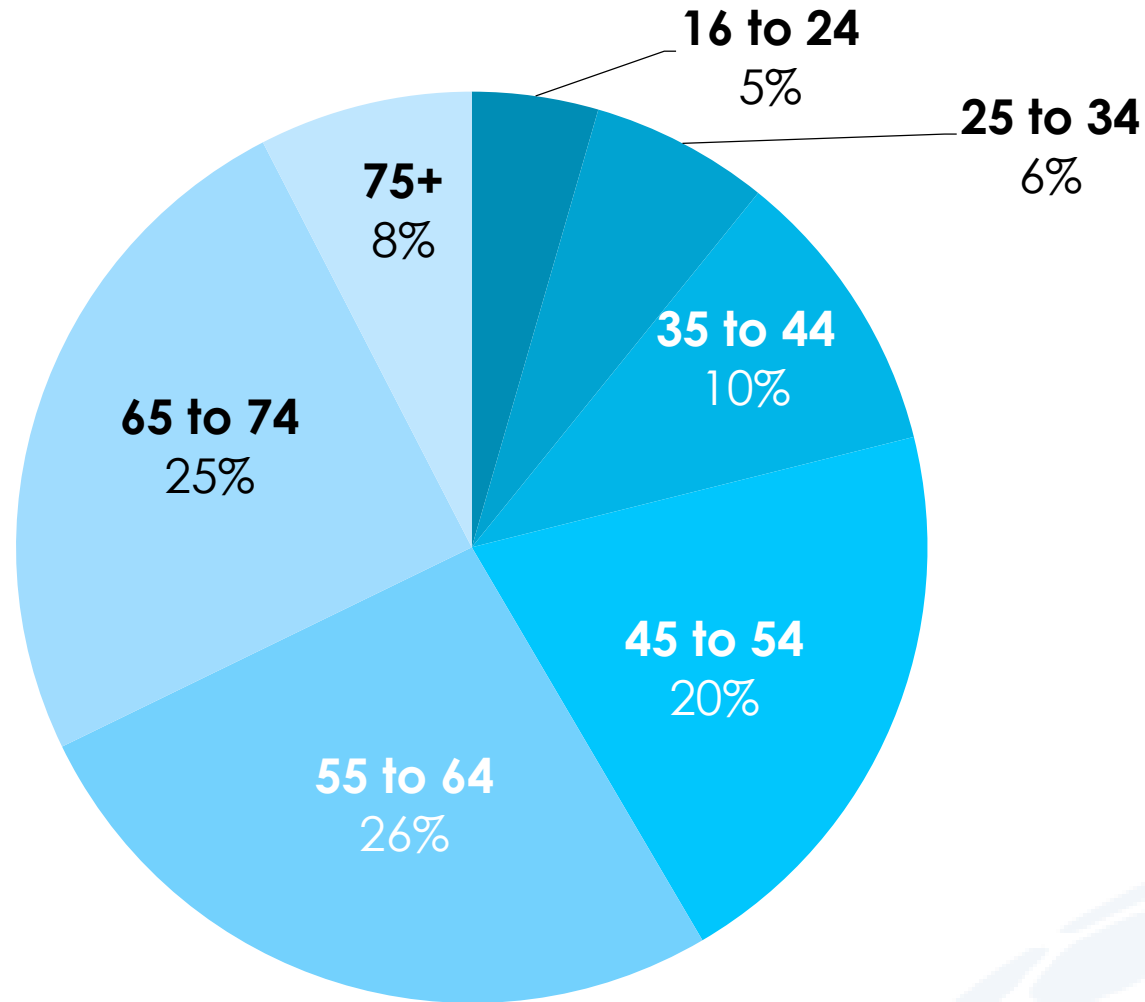
Male Member Age

**55**

Female Member Age

**62**

# Membership by Age in Scotland



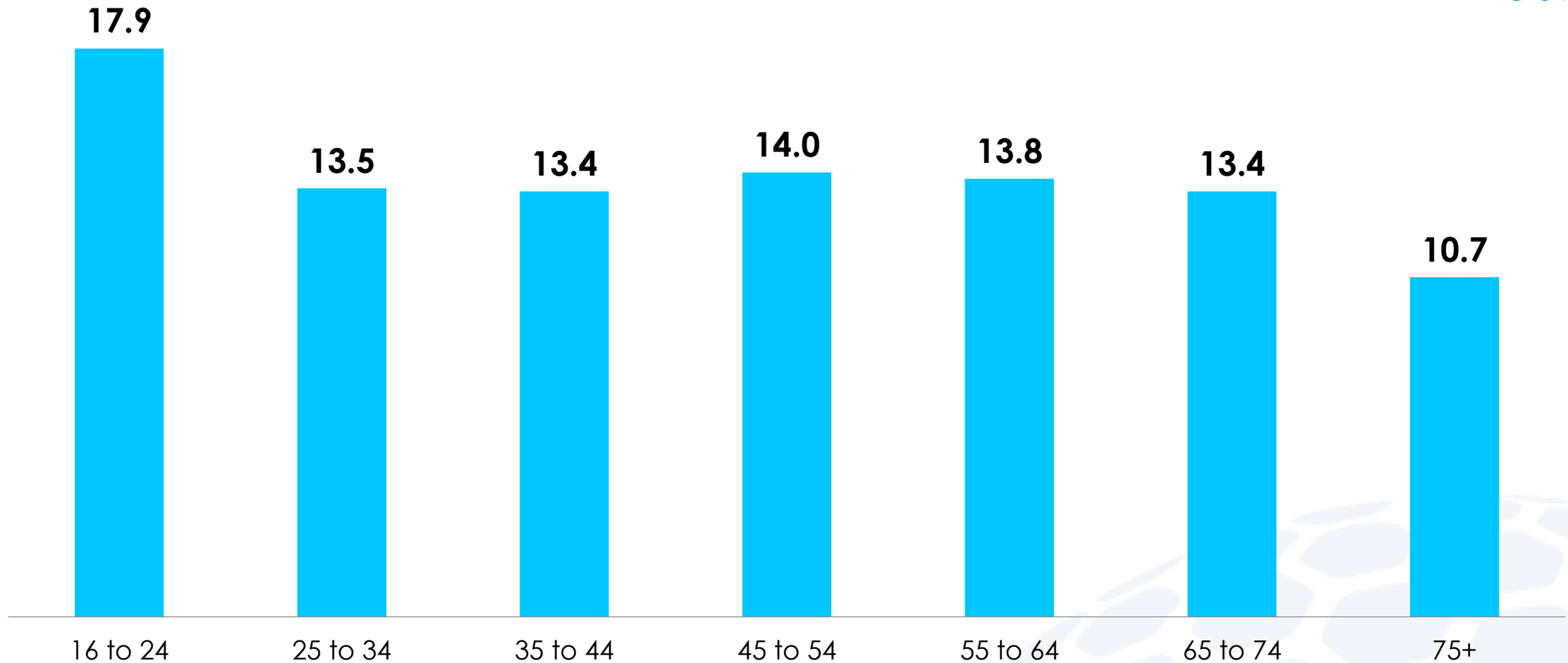
# Handicapping Trends

Source: Central Database of Handicaps 2019



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# Number of Competition Rounds by Age

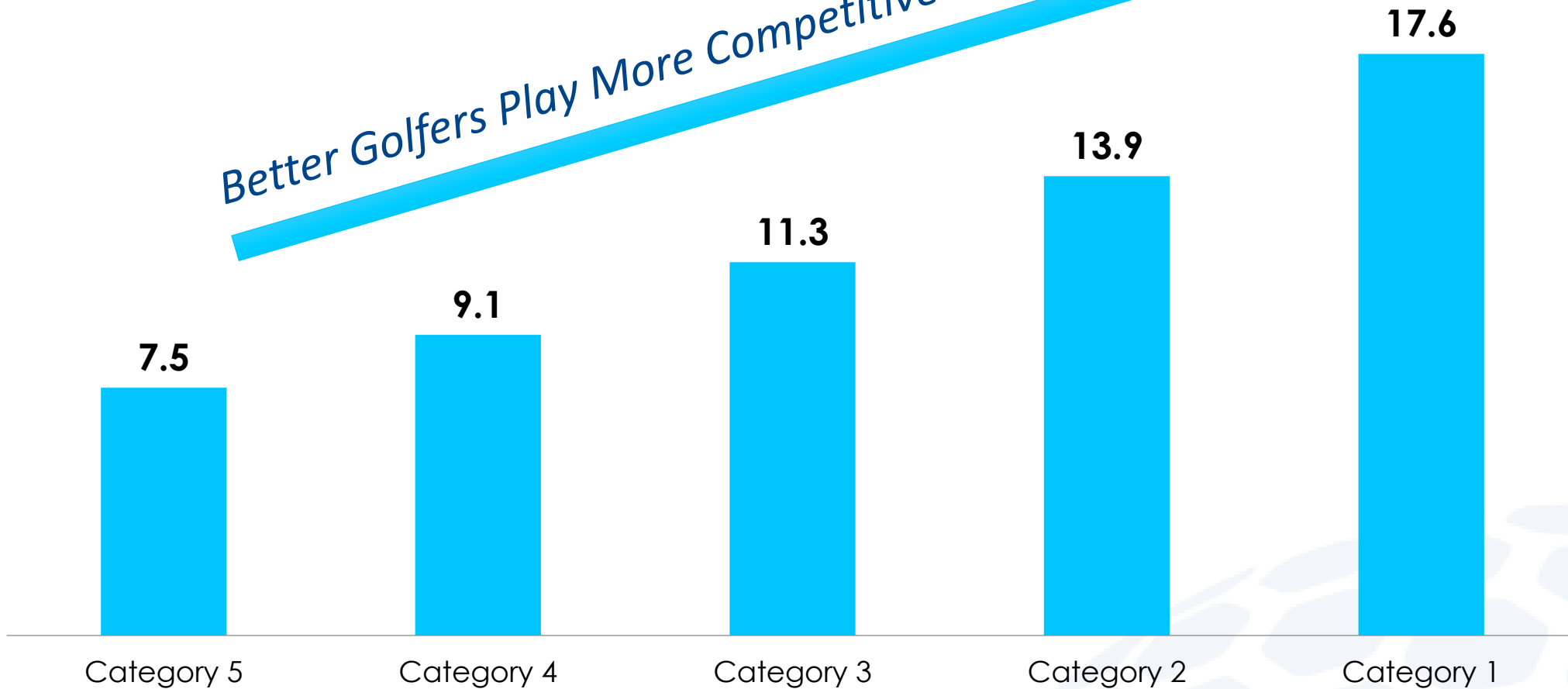




# Number of Competition Rounds by Category



Better Golfers Play More Competitive Rounds



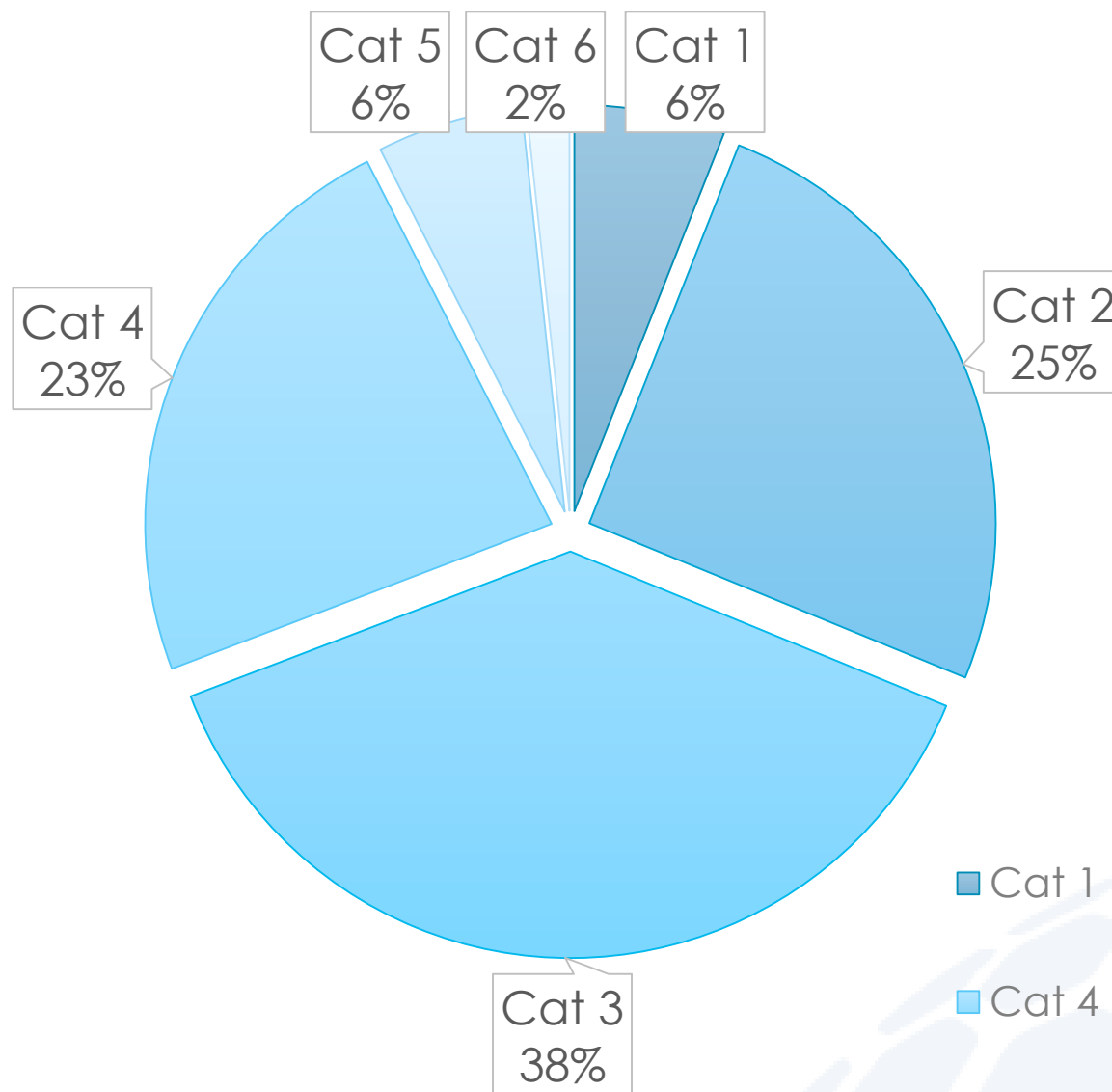
# Average Handicaps by Gender



Male  
**15.5**

Female  
**25.6**

# Handicap Split by Category



# Customer Feedback Tracker Data

Key data outputs from the largest ever survey of golf club members in Scotland



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# Customer Feedback Tracker (CFT)

- **202** Surveys throughout Scotland
- **24,000** Survey responses in total
- **30.6%** Response rate to email invite to do survey

The largest insight into Scottish Golf Club Members  
(2013 – 2019)



# Club Member Satisfaction (%)

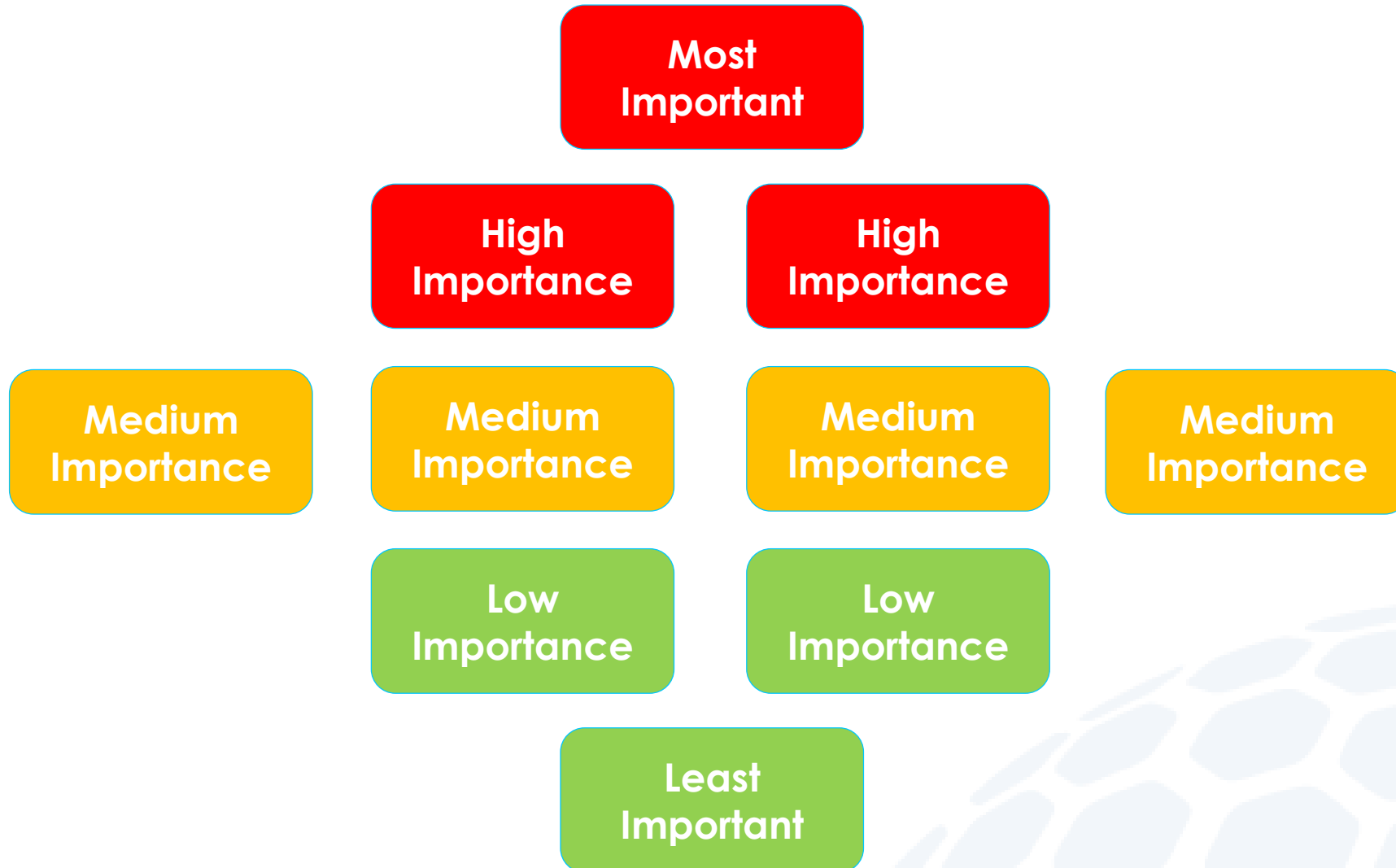


- |                           |       |
|---------------------------|-------|
| 1. Golf Course            | (83%) |
| 2. Customer Service       | (78%) |
| 3. Beverage at the Club   | (75%) |
| 4. Clubhouse Facilities   | (74%) |
| 5. Management of the Club | (73%) |
| 6. Member Services        | (72%) |
| 7. Food at the Club       | (71%) |
| 8. Competitions           | (68%) |
| 9. Professional / Retail  | (65%) |
| 10. Social Events         | (56%) |

Some things matter more than others

**“You need to know...what matters most  
to your customers”**

# Importance: Diamond-10



# The three most important for Club Members?



Golf Course	91.5%
Customer Service	85.5%
Management of the Club	85.3%

# The three least important for Club Members?



Social Events	46.6%
Professional / Retail	64.8%
Competitions	67.7%



# Importance: Diamond-10



# Key Areas of Underperformance



Where we fall short of our members expectations?

Management of the Club - 12.7%

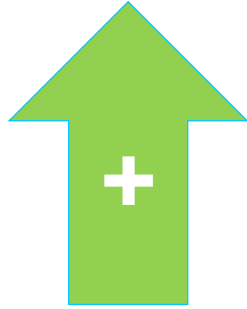
Clubhouse - 9.6%

Food at the Club - 8.7%

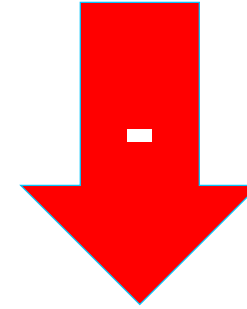
Golf Course - 7.8%

Customer Service - 7.2%

# Does importance change? Women



**Food**  
**Social**  
**Customer Service**

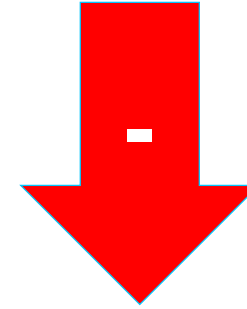


**Golf Course**  
**Professional & Retail**  
**Beverage**

# Does importance change? Younger Members



**Course**  
**Competitions**  
**Professional & Retail**  
**Food**



**Management**  
**Clubhouse**  
**Social**

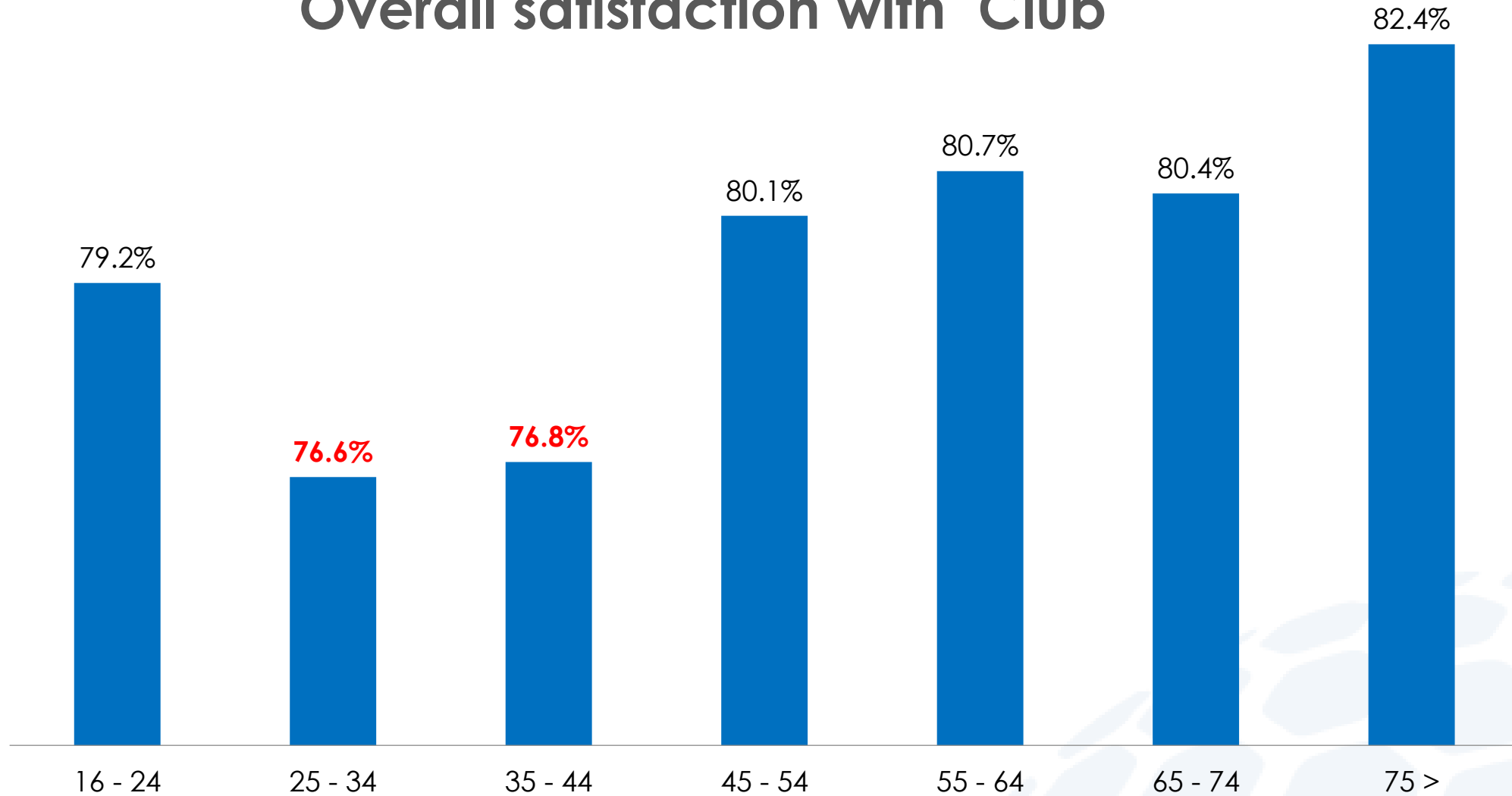
# Overall Questions



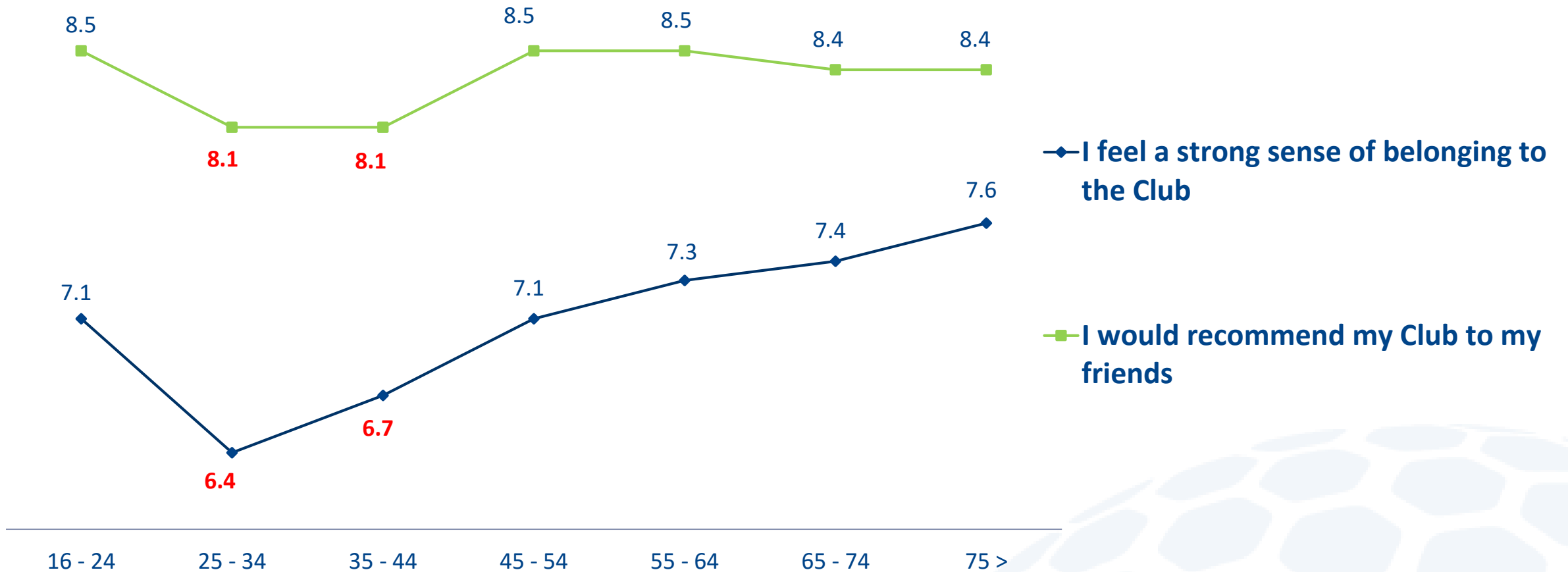
Question	Score
Overall <b>Satisfaction</b> with Club	<b>7.98</b>
Overall <b>Value for Money</b>	<b>7.75</b>
I would <b>recommend</b> this club to my Friends	<b>8.36</b>

# Is age a factor?

## Overall satisfaction with Club



# Is age a factor...?



# Summary – what do we know now?



- Ageing Scottish Club Membership
- Peoples playing habits have changed.
- What is really important to members?
- Different customers have different needs!





# Sports Marketing Surveys (SMS)

2018 Golf Participation in Britain – key data



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# Sports Marketing Surveys Key Data (2018)

## DEFINITIONS

- **ADULTS:**

- People aged 15 and over

- **INFREQUENT GOLFERS:**

- Adults who have played golf on a full length course less than 12 times in the last 12 months.

- **CORE GOLFERS:**

- Adults who have played golf on a full length course at least 12 times in the last 12 months.

Within the 'core golfers' category fall:

- **REGULAR GOLFERS:**

- Adults who have played golf on a full length course between 12 and 51 times in the last 12 months.

- **AVID GOLFERS:**

- Adults who have played golf on a full length course at least 52 times in the last 12 months.

- **FULL LENGTH COURSE:**

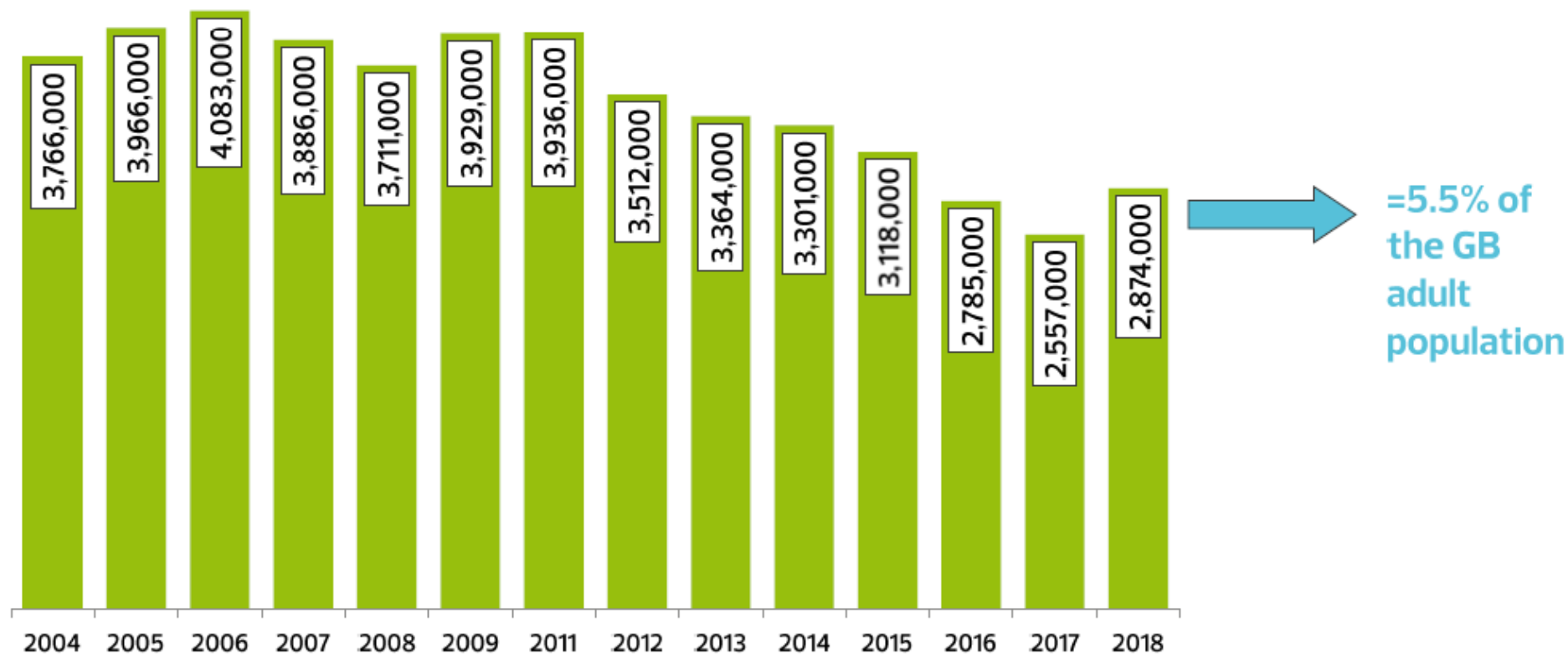
- 9 or 18 holes (not pitch and putt).

# Sports Marketing Surveys Key Data (2018)



## GB full length course users

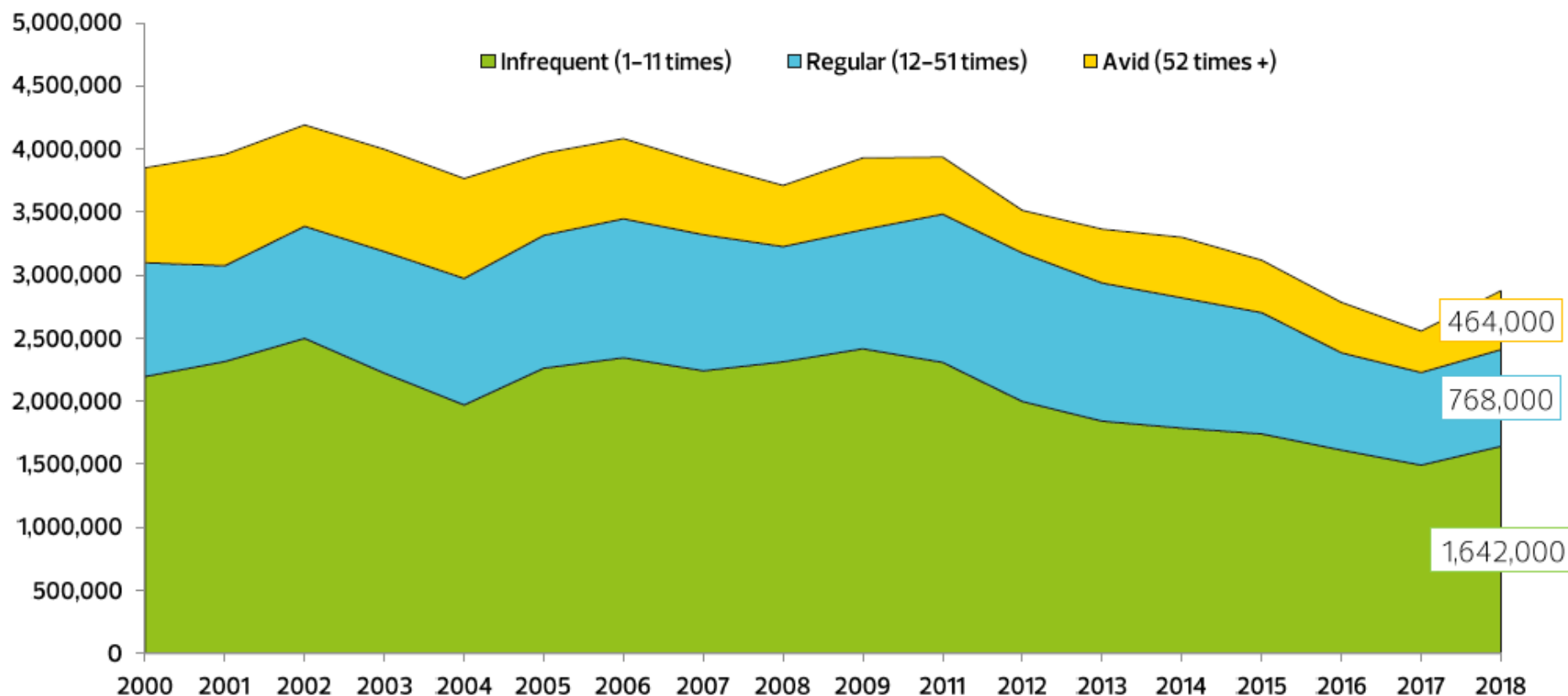
Adults who have played on a full length golf course (9 or 18 hole) at least once in the last 12 months.



# Sports Marketing Surveys Key Data (2018)

## GB full length course users

Adults who have played on a full length golf course (9 or 18 hole) at least once in the last 12 months.

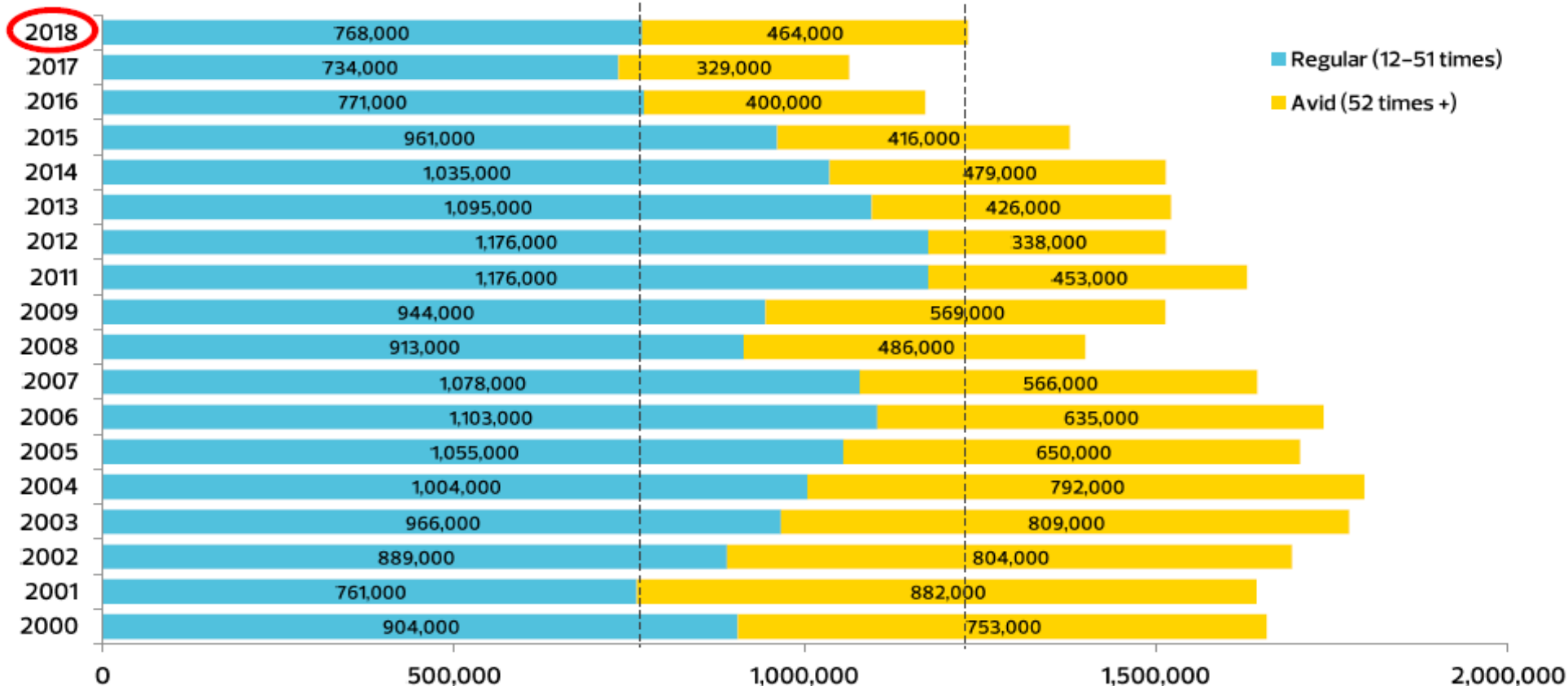


# Sports Marketing Surveys Key Data (2018)



## 'Core' golfers

Adults who have played on a full length golf course (9 or 18 hole) at least once in the last 12 months.

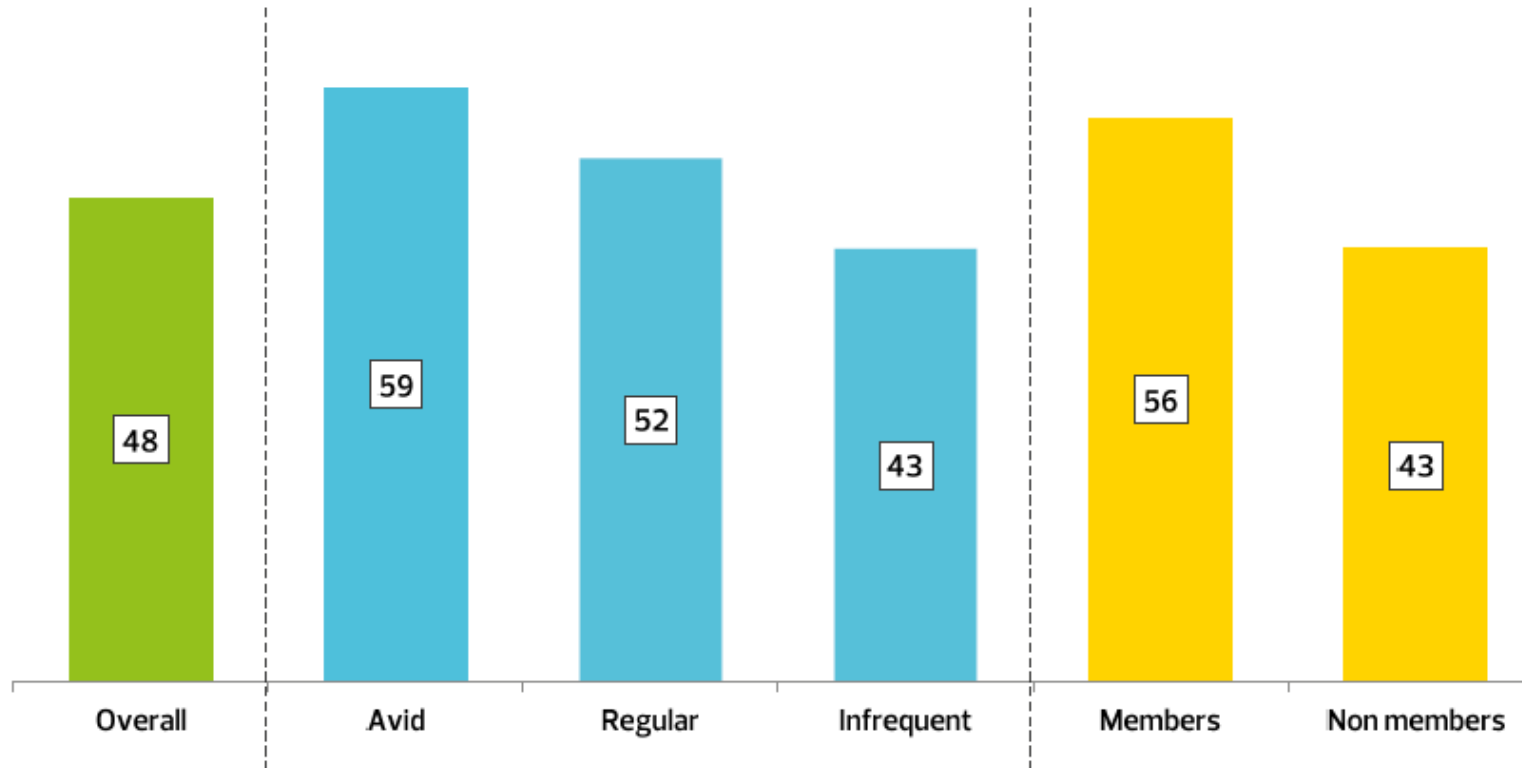


2018 = 1,232,000 'Core Golfers' = 43% of full course users

# Sports Marketing Surveys Key Data (2018)

## Average age of golfers

Golfers only



# Sports Marketing Surveys Key Data (2018)

## Average age of golfers

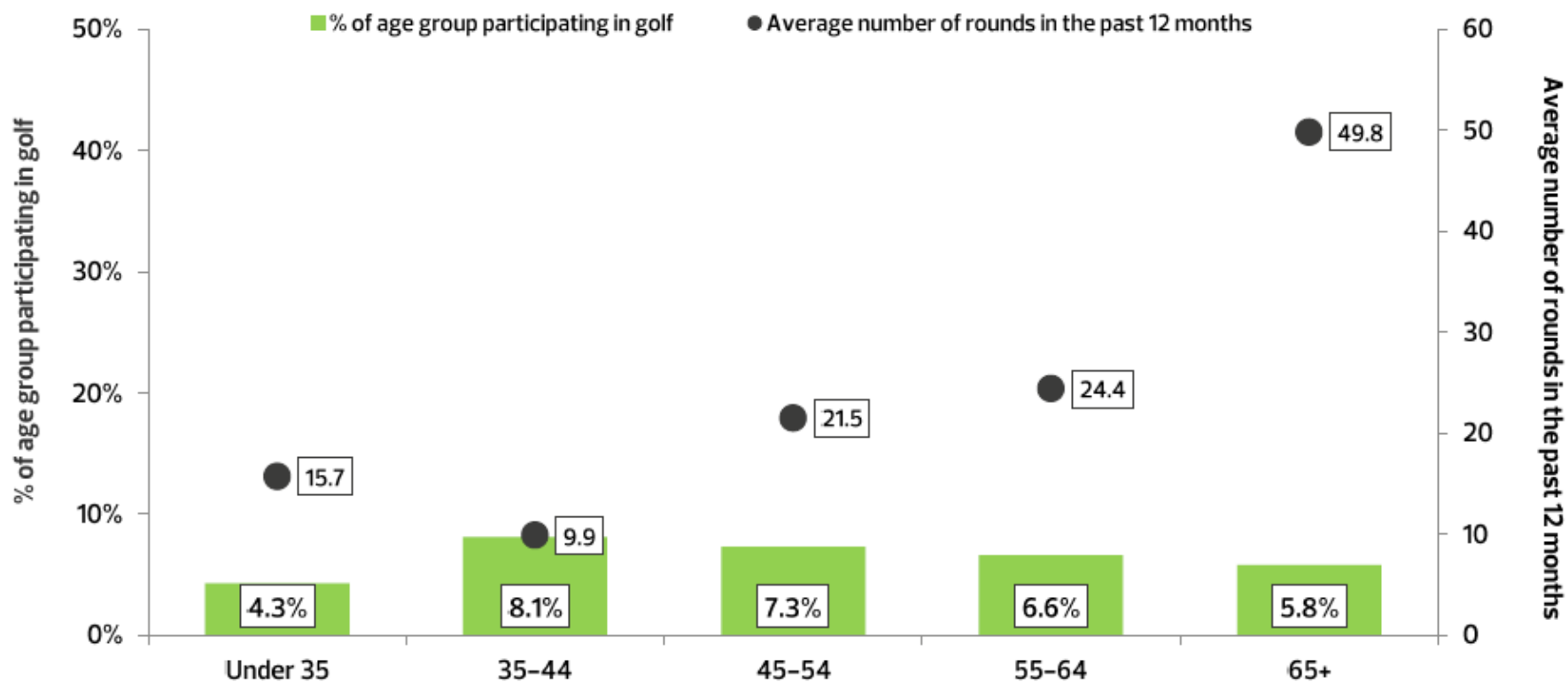
Golfers only

	2011	2012	2013	2014	2015	2016	2017	2018
OVERALL	42	45	45	46	47	46	48	48
Avid	62	61	63	58	62	65	65	59
Regular	40	45	51	51	50	47	44	52
Infrequent	39	42	38	42	42	42	44	43
Member	52	55	55	54	57	54	58	56
Non-Member	39	40	40	43	42	44	45	43

# Sports Marketing Surveys Key Data (2018)

## Participation and rounds played by age

Golfers only – Played at least once on a full length course

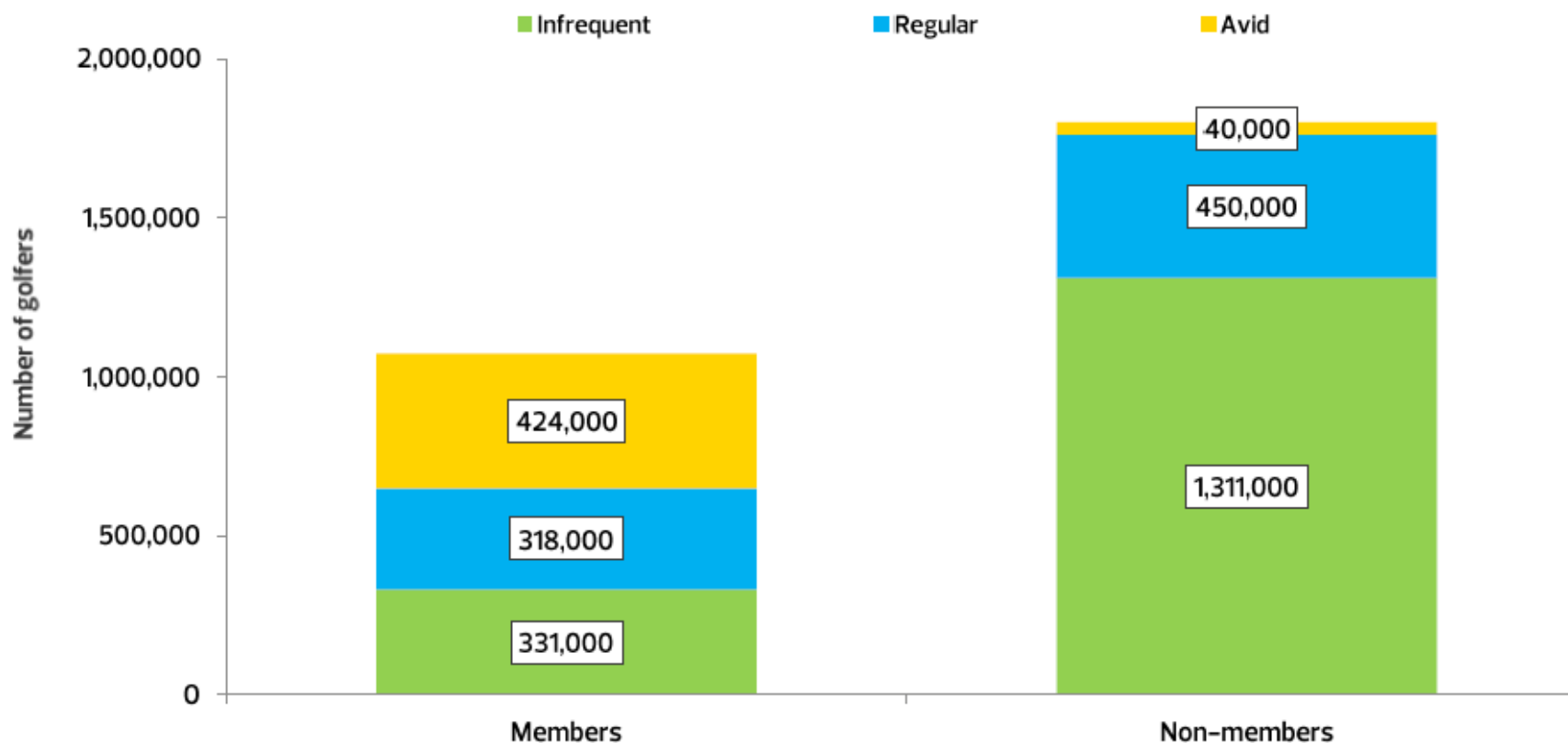




# Sports Marketing Surveys Key Data (2018)

## Golf club membership

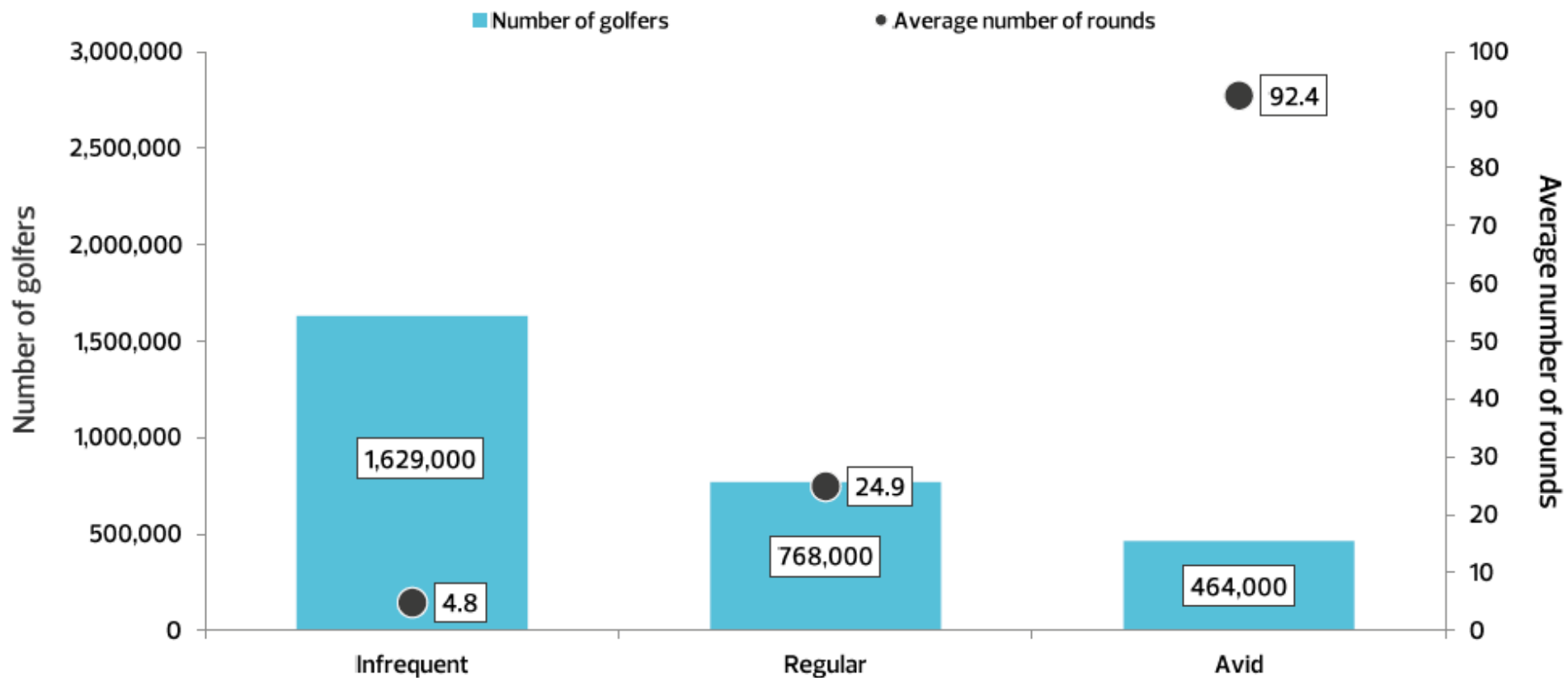
Golfers only



# Sports Marketing Surveys Key Data (2018)

## Average number of rounds

Golfers only



# Sports Marketing Surveys Key Data (2018)



## Golf club membership

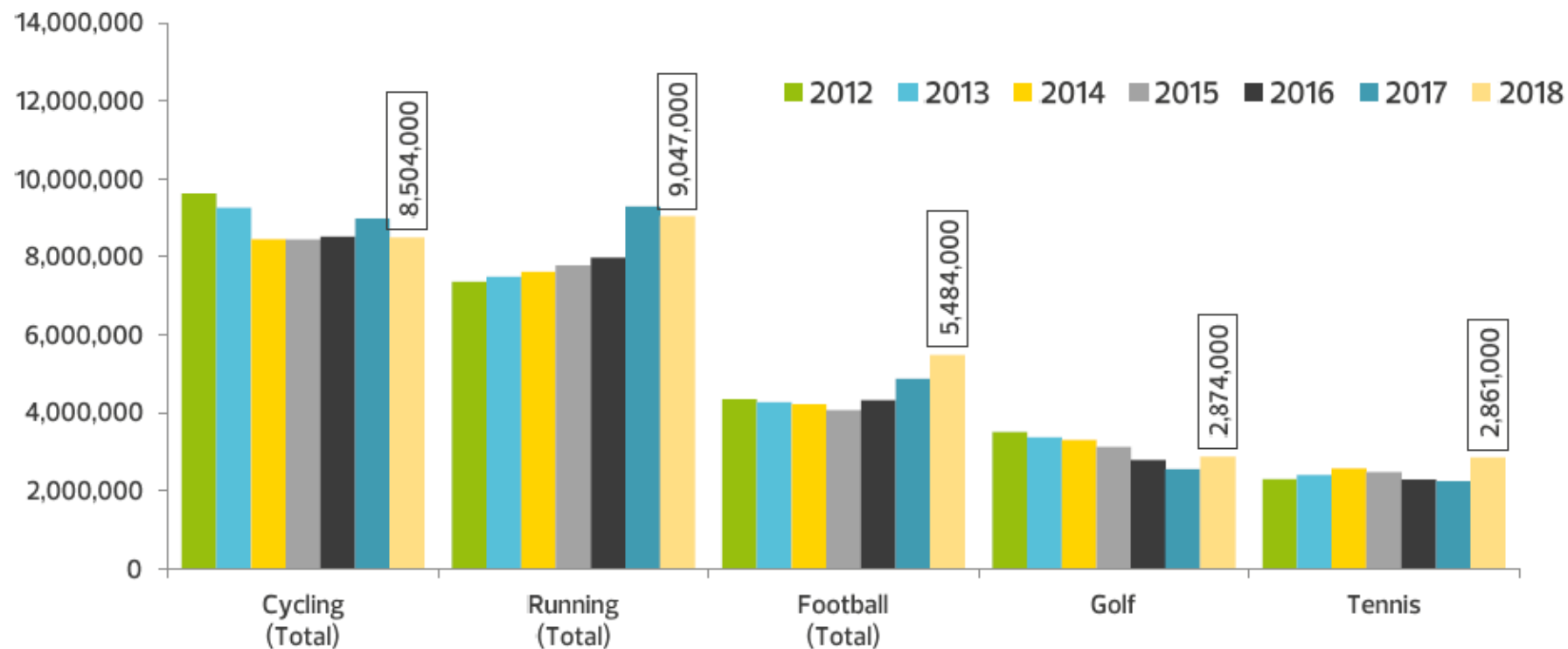
		All Golfers	Members	Non-members
Gender	Male	85%	83%	85%
	Female	15%	17%	15%
Age	15-29	17%	10%	20%
	30-44	26%	15%	31%
	45-64	36%	34%	37%
	65+	21%	41%	10%
Lifestyle	Children in household	28%	19%	33%
	No children in household	72%	81%	67%
	Married / Co-habiting	72%	71%	72%
	Single / Widowed / Divorced / Separated	27%	27%	28%

# Sports Marketing Surveys Key Data (2018)



## Sport Participation

Adults who have participated at least once in any form of the sport in the last 12 months.

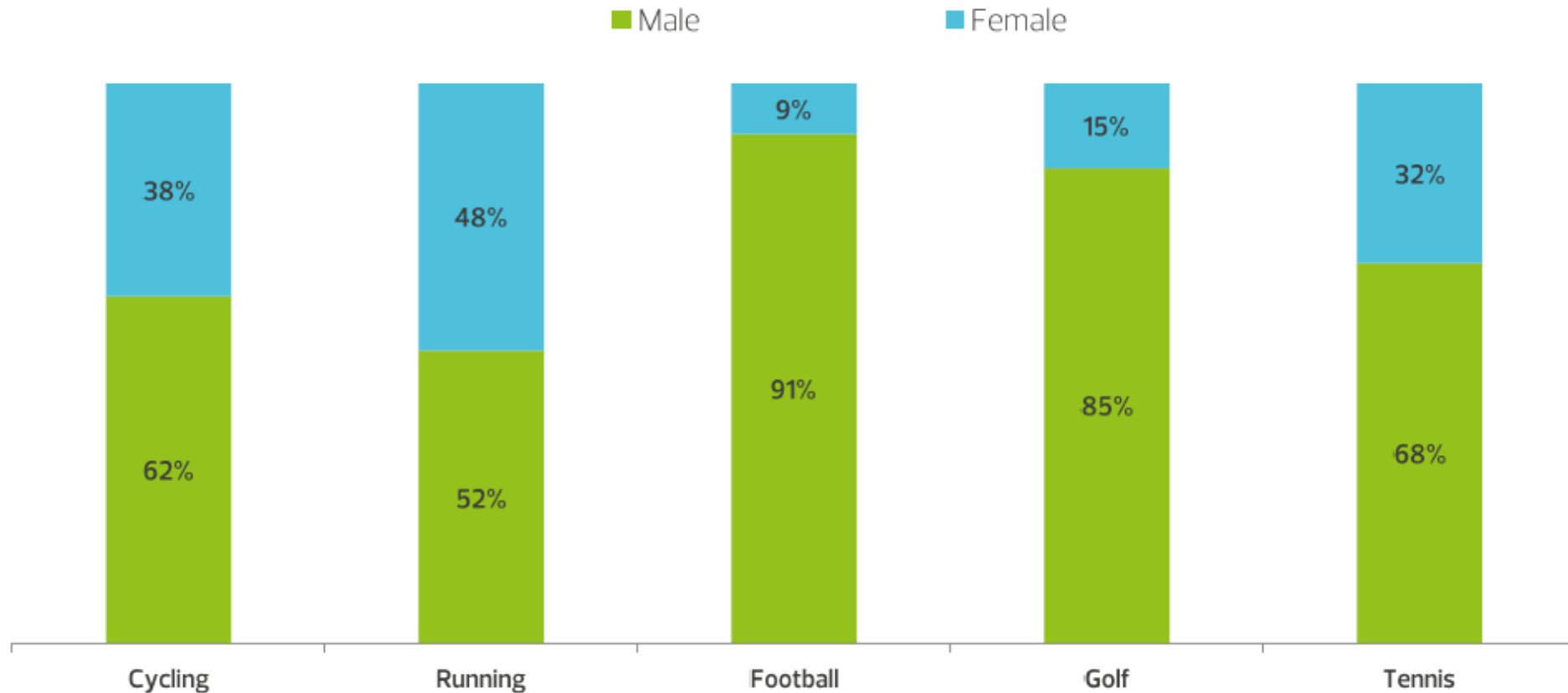


# Sports Marketing Surveys Key Data (2018)



## Gender of participants

Adults who have participated at least once in any form of the sport in the last 12 months.

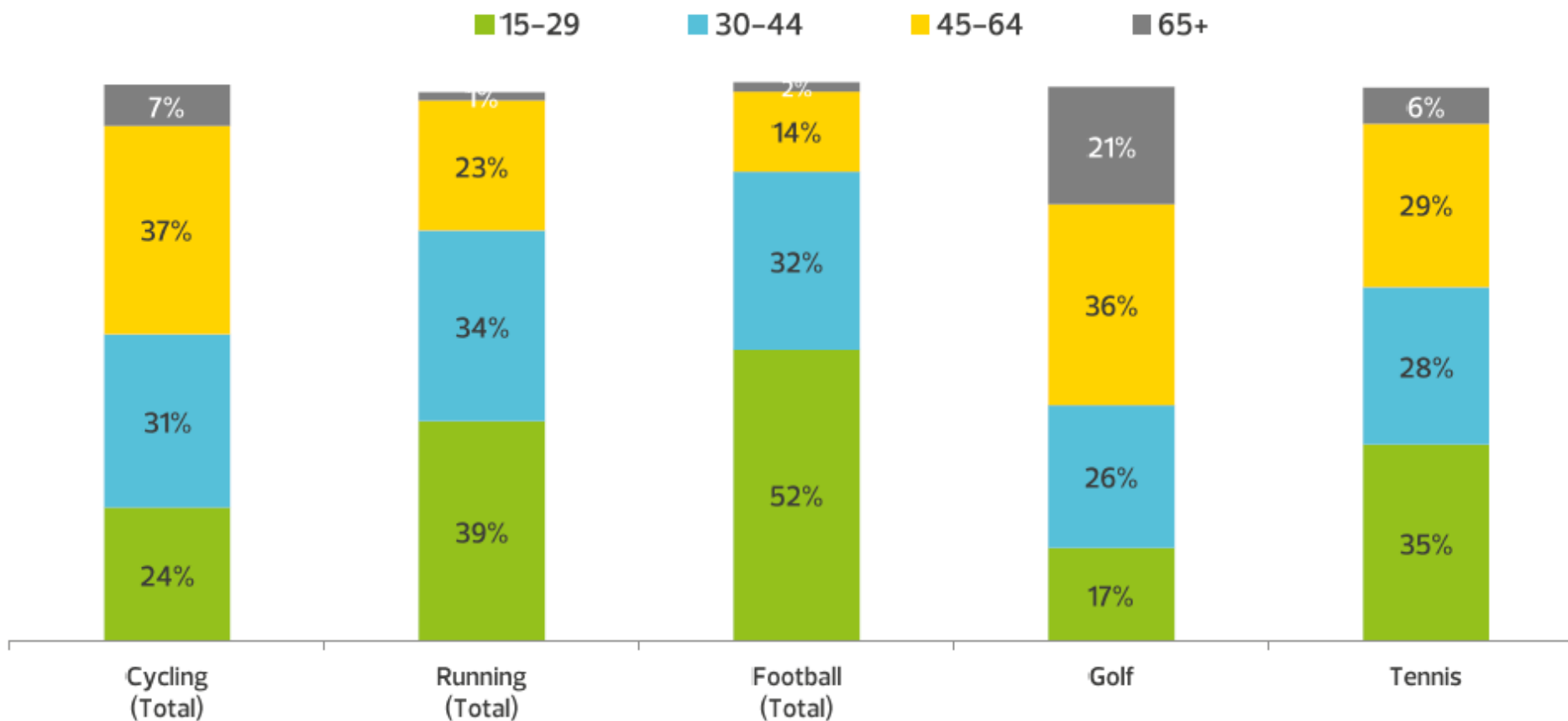


# Sports Marketing Surveys Key Data (2018)



## Age of participants

Adults who have participated at least once in any form of the sport in the last 12 months.



# Sports Marketing Surveys Key Data (2018)

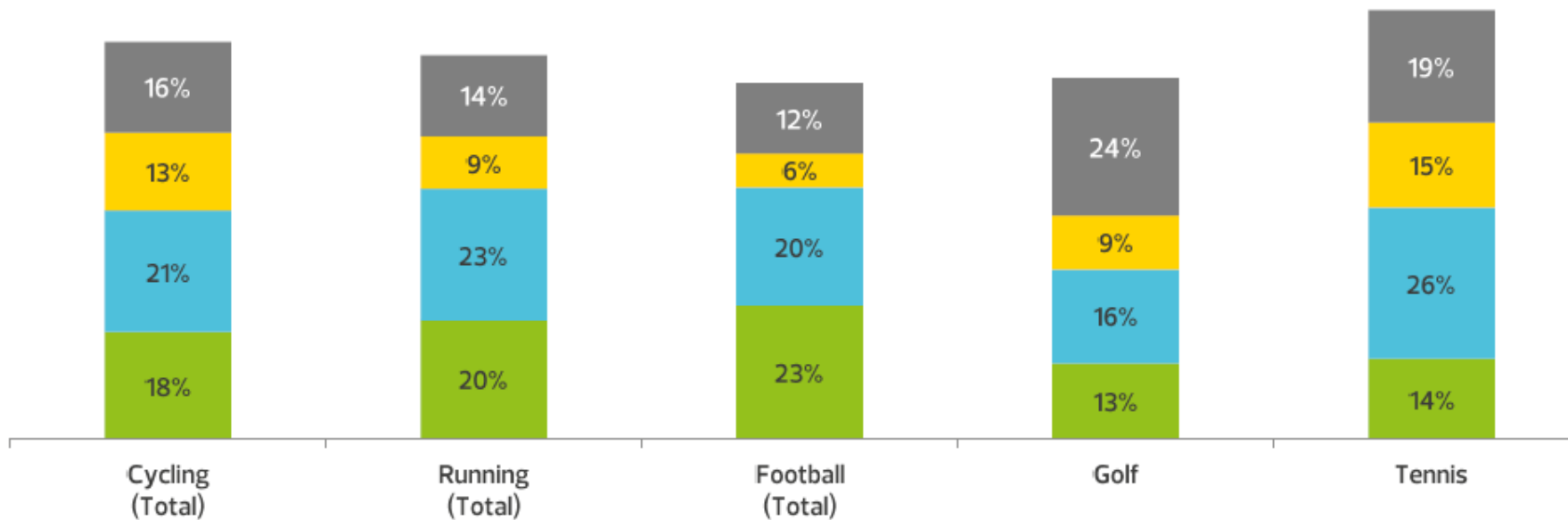


## Income of participants

Adults who have participated at least once in any form of the sport in the last 12 months.

■ Up to £25k ■ £25k to £50k ■ £50k to £75k ■ £75k +

NB: Remaining % refused to give an answer to the income question



# Sports Marketing Surveys Key Data (2018)



## Additional Key Stats:

- Average annual spend of a club member over 40: **£1,911**
- Average annual spend of a club member under 40: **£1,611**
- Average annual spend of a non-member: **£767**
- Average annual spend of a non-member on green fees: **£225**



# Golf Participation Study 2018:

## Scotland Specific Stats



Total Adult Population:	<u>4,482,000</u>
• <u>Regular golfers</u>	<u>358,560</u>
• <u>Occasional golfers</u>	<u>448,200</u>
• <u>Used to be a golfer</u>	<u>403,380</u>
• <u>Never been a golfer</u>	<u>3,227,040</u>
• <u>Non-golfers who say "the idea of taking up golf appeals to me"</u>	<u>448,200</u>
• <u>Never considered themselves to be a golfer, but have considered taking it up</u>	<u>224,100</u>
• <u>Number who've played a form of golf in the last year</u>	<u>1,344,600</u>
• <u>Played a form of golf once per month during the peak season</u>	<u>268,920</u>

Source: England Golf

# Thank You...

We hope you find this presentation useful and that you can use the data as evidence to share with your committee and club members. If you need further assistance with this resource, please contact your Regional Club Development Officer.



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