The Right Invitation:

A Comprehensive Research Study to Guide the Golf Industry to Meaningfully Increase Women's Golf Participation and Satisfaction

SPORTS & LEISURE RESEARCH GROUP

BACKGROUND AND OBJECTIVES

- Prior research conducted and sponsored by The Little Family Foundation and other organizations have spoken to the missed opportunities to truly engage women in the game of golf. While recent strides have been made to create more welcoming and need-specific products and services for women, the golf industry is still faced with flat to declining participation and large numbers of women who drop the game each year due to a variety of factors including service lapses, hostile environment, poor placement of tee boxes, limited accessibility to a desired golf experience and women-specific products and services.

- Prior research has led to a variety of insights and programs to address some of these issues, but has stopped short of identifying the magnitude of the situation or demonstrating the specific impact of various initiatives. Further, there remains a need to place key issues and opportunities in a proper hierarchical context and to develop projectable empirical evidence for strategies that, if implemented by the industry, can drive increased participation and satisfaction among women golfers.

- Toward this end, The Little Family Foundation has sponsored a multi-phased research program to truly understand key drivers of satisfaction and increased play that can be implemented nationally and at the grass roots level to address the salient needs of women golfers and identify strategies and tactics that provide a more inviting experience and increases satisfaction, participation and retention of women golfers.

METHODOLOGY

- Qualitative research phase to generate hypotheses and identify critical issues
  - In depth interviews conducted in Boston, Los Angeles and Dallas

- Quantitative Assessment
  - On-line surveys conducted among 1772 females
    - 999 Current Golfers
    - 773 Lapsed Golfers (less than 8 rounds in past 12 months)
  - Telephone surveys conducted with facility owners at 600 public golf facilities

- Both phases conducted Summer of 2009

Key Highlights and Two Minute Take-Aways

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KEY HIGHLIGHTS AND TWO MINUTE TAKE-AWAYS

- Study results verify and quantify the conclusions of previous research, that asserted that for women golfers, cost is the biggest barrier to increased frequency of playing the game, followed by time demands.
- In order for the golf experience to be perceived as worth both the time and money, it must satisfy women's needs on three key dimensions:
  - It must be an enjoyable social occasion
  - It should leave them with a sense of accomplishment
  - It should not be fraught with unnecessary physical and emotional stress
- In many cases, these needs are not being met…..
- For many respondents, the inability for the game to adequately address these needs is directly attributable to both game specific inhibitors, for example inadequate placement of tees and other societal factors, such as conflicting priorities for attention such as child care.

KEY HIGHLIGHTS AND TWO MINUTE TAKE-AWAYS

- For female golfers, a round of golf is as much a social experience as a competitive one. And the social aspects carry even more weight for Lapsed Golfers.
  - Half of Current Golfers and two thirds of Lapsed Golfers say that for them, golf is primarily a social activity.
- As a consequence, having enjoyable golf partners is key to overall satisfaction with the game and to frequency of playing.
  - 39% of Current Golfers and 50% of Lapsed Golfers say they'd play more often if they had more people to play with.
  - For Lapsed Golfers, "being able to play with people of my choosing" is rated second highest in importance.
  - Current Golfers are much more satisfied than lapsed golfers with the availability of golf leagues for them to join.
  - Compared to Current Golfers, Lapsed Golfers tend to have had a significantly smaller variety of playing partners.

KEY HIGHLIGHTS AND TWO MINUTE TAKE-AWAYS

- Unfortunately, too many women find themselves frustrated by their inability to hit far enough and to complete a round in a reasonable amount of time. And the data suggests that the deck is stacked against them, with holes that are in fact significantly longer than most women can hit.
  - Among both Current and Lapsed Golfers, only about two-thirds feel that tee boxes are placed so that they can reach the green in regulation.
  - But, in fact, comparison of women's estimated distances hit and typical length of holes suggests that at least half of women are unable to reach the green in regulation. Actual data previously provided by a leading OEM indicates an even lower incidence.
  - Analysis of satisfaction on specific key drivers shows that the length of holes stands out as a problem area for both Current and Lapsed Players. This is consistent with findings of previous research conducted by the Little Family Foundation.
  - Just over half (57%) of Lapsed Golfers feel that there are enough short holes on their courses, and 50% of Lapsed Golfers feel that having enough short holes is important. compared to 27% of Current Golfers.
  - Even for current players, among the greatest gaps in terms of overall satisfaction is between those that feel the course is "too long" and those that don't (Only 68% of those who feel the course is too long, are satisfied, vs. 81% of those for whom length is not perceived to be an issue)

KEY HIGHLIGHTS AND TWO MINUTE TAKE-AWAYS

- Women golfers are seeking a pleasant social outing, *not* a test of their physical and emotional stamina. Thus, lack of basic comforts and amenities are key detractors to their enjoyment of the game. Women rate sufficient number of restrooms and ample drinking water, in the top tier of factors for importance, yet…
  - More than a third of women feel that there are an insufficient number of restrooms on the course
  - Similarly, only about two thirds agree there is ample drinking water
  - Only half feel there are appealing food choices available
- Women also care a great deal about, and perceive the following to be problem areas that can be significant stressors:
  - the condition and aesthetics of the course
  - the ease of booking tee times
  - having ample directional signage on the course

KEY HIGHLIGHTS AND TWO MINUTE TAKE-AWAYS

- In sum, Key Drivers of Satisfaction are:
  - Overall Cost/Value
  - Enjoyable partners
  - Comfort Amenities (sufficient restrooms, water, healthy food options, ladies locker room)
  - Mitigation of time demands and conflicting priorities, like child care, that are not integrated into the golf experience.
  - Not getting lost (ample directional signage throughout the facility and other navigational aids)
  - Minimal frustration with the game itself ("how well I play", ability to reach the green in regulation, enough short holes, a round that doesn't take too long)
  - Ease of booking/securing tee times
  - A course that's well maintained, in good condition and aesthetically pleasing

KEY HIGHLIGHTS AND TWO MINUTE TAKE-AWAYS

- But frustrations abound:
  - Cost is the primary reason for diminished frequency of play, yet only half of facilities report offering 9-hole play and only 14% offer pay-by-the-hole or other flex pricing programs.
  - Time also presents a major barrier, with work, child care and other family demands competing with golf for time. Nearly half of women say a typical day at the golf course lasts more than their desired maximum of four hours.
  - More than one third of women say they cannot reach the green in regulation.
  - Less than two thirds feel there are sufficient restrooms and drinking water.
  - Only half of facilities offer healthy food options.
  - Fewer than half of facilities have directional signage throughout the facility.
  - Off the course itself, few facilities make efforts to enhance the social experience (e.g., women's golf leagues, sit down restaurants, special interest events).

KEY HIGHLIGHTS AND TWO MINUTE TAKE-AWAYS

- Moreover, Facilities underestimate the importance to women of many of these factors.
  - 58% say the *condition of the course* is important vs. 93% of Current and 91% of Lapsed Golfers.
  - 38% say *speed of play* is important vs. 75% of Current and 63% of Lapsed Golfers.
  - 38% say *availability of drinking water* is important vs. 74% of Current and 65% of Lapsed Golfers.
  - 37% say *appropriate directional signage* is important vs. 75% of Current and 74% of Lapsed Golfers.
  - 41% say that *length of the golf course* is important vs. 60% of current and 57% of Lapsed Golfers.

KEY HIGHLIGHTS AND TWO MINUTE TAKE-AWAYS

What is the "recipe" for success in attracting and retaining women golfers?

Our analysis suggests that facilities can enhance women's perceived value of a round of golf by addressing three fundamental issues.

- **Step 1 - Eliminate extraneous physical and emotional stressors**
  - Provide ample restroom facilities throughout the course
  - Ensure there is sufficient drinking water available, as well as healthy food options
  - Provide ample directional signage, as well as additional navigational aids (maps, GPS) in carts if possible
  - Ensure there is a well-designed and appointed ladies' locker room; particularly if one exists for men.
  - Seek opportunities to streamline the tee-time booking process
- **Step 2 - Reduce frustration with the game itself**
  - Keep course well-maintained. Aesthetics are important.
  - Re-evaluate tee box placements, so that more women can reach green in regulation
  - Provide more short holes
  - Offer 9-hole play and/or other flex pricing
- **Step 3 - Enhance the "social" aspects for women (especially appealing to Lapsed Golfers)**
  - Increase potential playing partners by offering women's golf leagues
  - Provide more "off-the-course" or clubhouse social opportunities, such as a sit-down restaurant, special interest events and after hours "socials."

KEY HIGHLIGHTS AND TWO MINUTE TAKE-AWAYS

- Although current fees are already perceived as expensive by many women, pricing analysis suggests that women may be willing to pay a premium of between 8% and 15% for their "ultimate" facility, that is a facility that offers the key ingredients in the "recipe."

- In addition, while less critical to women's satisfaction two other elements can enhance revenues:
  - Establish dedicated women's departments in the golf shops. Green Grass shops with dedicated women's departments average 15% higher revenues overall than those without.
  - Provide family golf programs inclusive of on-site childcare, and parent-child golf experiences (outings, lessons or clinics and friendly "competitions"). Lapsed golfers are more likely to have kids at home compared to current golfers (62% vs. 48%) and place greater importance on these programs.