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THE RIGHT INVITATION

A Comprehensive Research Study to Guide the Golf Industry to Meaningfully Increase Women's Golf Participation and Satisfaction. A National Golf Course Owners Association Foundation study funded by The Little Family Foundation.

The overall message is that there is a great economic opportunity for the golf industry to attract and keep a large underrepresented and underserved portion of the golfing public. While our goal is to promote women's and family play, our study concentrated on women who wield very significant economic power and who increasingly determine how family leisure time is spent. Golf is clearly a sport in which the whole family can participate together over an extended period of time.

We will be providing the golf industry with a detailed "how to" guide (see below) which will outline very specifically what steps courses need to take if they are serious about making the most of this economic opportunity by attracting women and their families. Much of this plan is based on our experience of knowing what worked at Province Lake Golf, the course we owned from 1996 to 2005. However, we felt that we needed a major study to verify what we had learned so we commissioned Jon Last of Sports & Leisure Research Group to perform the study.

In designing the study, we did some things very differently:

- › As many women quit the sport each year as start playing. Therefore, we interviewed lapsed as well as current players.
- › We asked women what their “ultimate” golf facility and experience would be like and tested the results against 600 “female friendly” courses to see what they provide.
 - The difference between what women and golf facilities think is important is striking.
 - This lack of congruity is particularly notable when considering the data that show that women would pay an 8-15% premium to play their “ultimate” facility.
- › We also know that many in the industry will be dubious about what we propose. For this reason, we designed a longitudinal part of the study to be carried out over two to three years. We will select a number of courses that represent the full spectrum (i.e. public, private, resort, municipal) who agree to adopt our suggestions and measure their progress against their current base line level of play. This should provide the data to persuade the industry that following our suggested plan is worth the effort and will have an economic benefit.

For a number of years, we have all heard the mantra of “too expensive, takes too long, too difficult” as the reasons for flat to declining rates of play. There is much in the data that supports those points particularly as to cost and time. We did have some study results we did not anticipate. Surprisingly, the specific response about difficulty did not rank as highly as we anticipated. However, the data concerning inability to reach greens in regulation directly relates to this issue and is very significant. It shows that 1/3 of the women surveyed indicate that they can’t reach greens in regulation. Reality indicates that the figure is at least 50% and the data from a leading equipment manufacturer shows that the percentage is even higher.

We are struck by the lack of inventiveness on the part of the golf industry in addressing these issues. Many of the barriers can be overcome without great additional cost and with relatively rapid monetary return.

Our “how to” guide will include the following:

OVERALL

- › Welcoming friendly attitude toward all players as valued customers
 - This includes the first interaction with the customer wherever it may occur
- › Keeping the course in good condition must be a given as it is an expectation
- › Provide the opportunity for women to meet and choose more enjoyable golfing partners:
 - Women’s leagues
 - Women’s clinics
 - Family oriented activities—this should be coupled with child care
 - Special interest events
- › Work on speed of play issues with the goal of getting round times to 4 hours or less.
 - Proper tee positioning is a big part of this
- › Provide locker facilities at least equal to those provided for men
- › Provide adequate practice facilities

PRO SHOP

- › An equal amount of women’s apparel and equipment equally and well displayed
 - There is a 15% increase in sales in shops where there is a dedicated women’s department
- › Make the process of booking tee times as accessible and comfortable as possible.
- › Women staff in the pro shop

PLAY OPTIONS

- › To address time and cost issues:
 - 9 hole play
 - Pay by the hole or other flexible pricing options
 - Junior rates as a part of family play rate

- › Allow players to walk if they want

COURSE SET UP

- › Tee positioning
 - Eliminate the intimidation factor by providing tees at the proper yardages for the full range of swing speeds. The desire for more shorter holes from lapsed players is reflective of this need.
 - We will make the point that proper tee positioning is a key speed of play issue that in turn is a key economic issue for courses.

- › Good directional signage starting at the parking lot and continuing throughout the course.
 - Frequent, cleaner and better rest room facilities
 - More frequent drinking water... at least at every third tee
 - Ball washers at the forward tees
 - Make the course as visually attractive and as aesthetically pleasing as possible
 - This is different from course conditioning
 - GPS availability in carts or hand held devices

FOOD & BEVERAGE

- › More healthy menu choices such as salads and lower calorie items

- › Be sure that dining areas are pleasant places to eat

- › Have a drink/snack cart with frequent availability

CHILD CARE

- › Provide childcare at a reasonable rate to customers who are playing golf or taking lessons.
 - Note: Although the study surprised us by not giving as strong a response as we expected, we will put this on the list of suggestions. We think that the significantly higher number of lapsed players with children at home indicates an underlying need for this service.
 - We plan to survey the ski industry whose provision of this service places it way ahead of the golf industry in this area.

Of all these items the most expensive and the one that needs to be addressed first is the proper tee positioning. A golf facility can provide all the rest of the items and see some improvement, but if a facility does not provide a course that players enjoy, many if not most of the people it is targeting will not come back. Building new tees is the least expensive significant change to a course. We have spelled out the process in detail in our tee positioning paper, Proportional Tee Positioning, for those who want to understand the process for doing it properly.

When we produce the actual “how to” guide for the golf industry, we will need to be sure that the industry knows that the economic effects of following this recipe are not immediate. Patience is necessary. Based on our experience the changes take two to three years to reach full effect.

It also takes some innovative thinking about how to market these facility additions/changes in a way that gets the word out in the most cost effective manner without having a negative effect on the current customer base.

Arthur Little & Jann Leeming