EUROPEAN TOUR

COMPLETE GOLF ACTIVITY SURVEY GERMANY

Full report | June 2016
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INTRODUCTION | Objectives & Key questions

- Participation studies have traditionally assessed golf participation by analysis of play on full length golf courses and other more established forms of golf
  - Historically, forms of golf such as golf computer games and adventure golf have not been included

- In the face of allegations that golf participation is declining, the European Tour want to establish a complete picture of golf activity in the country including less traditional forms of the game
  - This information can then be used to inform the European Tour’s strategy going forward

1. HOW MANY PEOPLE IN GERMANY HAVE SOME INVOLVEMENT IN GOLF?

2. HOW IS GOLF PERCEIVED COMPARED TO OTHER SPORTS?

3. WHO PLAYS GOLF AND WHO DOES NOT?

4. WHAT WOULD ENCOURAGE GREATER GOLF ENGAGEMENT?
INTRODUCTION | Methodology

- 10,000 online interviews carried out in Germany
  - Fieldwork between the 9th and 26th June 2016

- Nationally representative survey of adults based on age, gender, region and income

- Respondents were also asked for information about the sports participation and frequency of any children (aged 6-17) in their household to give a view of junior participation

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Number of Interviews</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>4830</td>
</tr>
<tr>
<td>Female</td>
<td>5170</td>
</tr>
<tr>
<td>18–34</td>
<td>2611</td>
</tr>
<tr>
<td>35–54</td>
<td>3827</td>
</tr>
<tr>
<td>55+</td>
<td>3562</td>
</tr>
<tr>
<td>Up to €30k</td>
<td>3883</td>
</tr>
<tr>
<td>30k–€50k</td>
<td>2433</td>
</tr>
<tr>
<td>50k+</td>
<td>2558</td>
</tr>
</tbody>
</table>

SUMMARY
SUMMARY

- With an increase in the different kinds of golf available, the appeal of the sport has widened
  - 18 hole golf now represents a core section of the golf world rather than the definition

- While 18 hole golf courses are dominated by more affluent males, the wider definition of golf uncovers a greater variety of golfer types
  - Over 40% of individuals who have taken part in a golf activity but not 18 hole golf are females
  - Over three quarters of individuals who have taken part in a golf activity but not 18 hole golf are under the age of 55

- The wider definition of golf leads to a total German adult golfer figure of 3.2 million
  - Of these, only 1.1 million are full length golf course users
  - There are a further 0.6 million junior golfers

- There are some negative perceptions around the sport – as expensive and stuffy
  - Many people may think of golf only as the ‘pure’ golf course based game

- There is an opportunity to change perceptions by promoting the wider forms of golf and how they can fit in much more easily with every day life
SETTING THE SCENE | SPORTS & LEISURE ACTIVITIES
LEISURE ACTIVITIES | Top 15

**Adults**
- Reading: 64%
- Dining out: 62%
- Walking (recreational): 59%
- Cooking: 56%
- Cinema/Movies: 48%
- Gardening: 45%
- Watching sport: 35%
- Social media interaction: 34%
- Exercise/keeping fit: 33%
- DIY/Home improvement: 31%
- Crafts / Creativity: 20%
- Theatre: 17%
- Dancing: 15%
- Playing an instrument: 11%
- Fishing: 5%

**Children**
- Reading: 42%
- Dining out: 28%
- Walking (recreational): 22%
- Cooking: 14%
- Cinema/Movies: 13%
- Gardening: 13%
- Watching sport: 22%
- Social media: 32%
- Exercise/keeping fit: 47%
- DIY/Home improvement: 9%
- Crafts / Creativity: 18%
- Theatre: 6%
- Dancing: 19%
- Playing an instrument: 23%

Base: 10000
Base: 3203

Reading, dining out and walking were the top three leisure pursuits for adults in Germany.
SPORTS ACTIVITIES | Top 15

Adults

- Swimming: 37%
- Running/Jogging: 26%
- Going to gym / health club: 25%
- Cycling: 19%
- Health / fitness classes: 12%
- Football/Soccer: 12%
- Nordic Walking: 11%
- Yoga: 11%
- Badminton: 9%
- Table Tennis: 9%
- Skiing: 8%
- Basketball: 5%
- Tennis: 5%
- Volleyball: 5%
- All golf*: 6%

Children

- Swimming: 43%
- Running/Jogging: 19%
- Going to gym / health club: 9%
- Cycling: 16%
- Health / fitness classes: 7%
- Football/Soccer: 31%
- Nordic Walking: 2%
- Yoga: 2%
- Badminton: 10%
- Table Tennis: 9%
- Skiing: 12%
- Basketball: 10%
- Tennis: 6%
- Volleyball: 7%
- All golf*: 8%

Individual sports activities – swimming, running / jogging and going to the gym were the most popular amongst adults in Germany.
**SPORTS ACTIVITIES | Participation frequency**

### Adults
- Swimming (3685): 24.7%
- Running/Jogging (2591): 52.8%
- Gym / health club (2466): 61.4%
- Cycling (1870): 53.0%
- Football/Soccer (1222): 25.2%
- Health / fitness classes (1219): 42.6%
- Yoga (1116): 45.2%
- Nordic Walking (1092): 43.0%
- Table Tennis (877): 17.2%
- Badminton (865): 10.8%
- Skiing (825): 7.7%
- Tennis (545): 22.3%
- Volleyball (482): 15.2%

### Children
- Swimming (1388): 28.3%
- Running/Jogging (608): 37.6%
- Gym / health club (301): 41.5%
- Cycling (506): 47.3%
- Football/Soccer (1007): 51.5%
- Health / fitness classes (210): 32.4%
- Yoga (80): 36.9%
- Nordic Walking (73): 21.8%
- Table Tennis (301): 21.8%
- Badminton (322): 17.0%
- Skiing (387): 9.6%
- Tennis (190): 27.0%
- Volleyball (223): 18.8%

Base numbers shown in brackets. See slide 20 for golf frequency. Base numbers shown in brackets.
PERCEPTIONS | SPORTS
SUMMARY | Perceptions

- The German population in general see golf as an inclusive sport
  - Good for different ages to play together
  - Good for men and women to play together

- There is a feeling that the sport is more suitable for older people than younger
  - Golf is seen as more sociable than running, cycling and tennis — but similar to football

- There is a perception of golf as more boring, challenging and more stuffy than other sports.

- When looking at golfers vs non golfers in terms of perception
  - Golfers were much more likely to see golf as a good sport for younger people and a good sport for ‘people like me’
  - Golfers were also much more likely to rate golf as offering good exercise
  - Non golfers were more likely to see golf as boring and stuffy
SPORTS PERCEPTIONS

- Is a good sport for younger people
- Is a good sport for older people
- Is a sport for people like me

Base: 10000
SPORTS PERCEPTIONS

- Is boring
- Is challenging
- Is stuffy

- Is a sociable sport
- Offers good exercise
- Has broad appeal

Base: 10000
GOLF PERCEPTIONS

- Is a good sport for younger people: 25% (Golfers 599), 10% (Lapsed/Non-golfers 8728)
- Is a good sport for older people: 80% (Golfers 599), 76% (Lapsed/Non-golfers 8728)
- Is a sport for people like me: 42% (Golfers 599), 9% (Lapsed/Non-golfers 8728)
- Is a good sport for people of different ages to play together: 66% (Golfers 599), 46% (Lapsed/Non-golfers 8728)
- Is a good sport for men and women to do together: 72% (Golfers 599), 55% (Lapsed/Non-golfers 8728)
- Is a good sport for people of varying ability to do together: 45% (Golfers 599), 29% (Lapsed/Non-golfers 8728)

- Is boring: 31% (Golfers 599), 59% (Lapsed/Non-golfers 8728)
- Is challenging: 80% (Golfers 599), 76% (Lapsed/Non-golfers 8728)
- Is stuffy: 27% (Golfers 599), 32% (Lapsed/Non-golfers 8728)
- Is a sociable sport: 48% (Golfers 599), 30% (Lapsed/Non-golfers 8728)
- Offers good exercise: 36% (Golfers 599), 19% (Lapsed/Non-golfers 8728)
- Has broad appeal: 23% (Golfers 599), 11% (Lapsed/Non-golfers 8728)

Base numbers shown in brackets
GOLF | COMPLETE ACTIVITY
SUMMARY | Complete golf activity

- Using the broader participation definition, 6% of the German population had engaged with some form of golf over the last 12 months
  - For both adults and children adventure golf was the most popular format played with full length golf being the next more popular format for adults

- This equates to 3.2 million adults, and a further 0.6 million juniors in the UK

- The most frequent golf activity was seen amongst adults who had played 18 hole golf or visiting a driving range
  - For juniors, golf in school or golf computer games were the most frequently played

- Similarly to the UK Golf Actives findings, Germans who have played a 18 hole golf course tend to be predominantly male and in the top socio-economic groups
  - Unlike the UK, the age profile of German adults who have played a 18 hole golf course is very similar to the age profile of the general population

- Those engaging in other golf activity (not 18 hole) were far more reflective of the population as a whole
  - More likely to be female, younger, less white and from a broader socio-economic background
GOLF ACTIVITY | Types of golf

Adults (10000)  
- No golf activity: 94%
- Some golf activity: 6%

Children (3203)  
- No golf activity: 92%
- Some golf activity: 8%

6% of the adult German population had taken part in some form of golf activity in the last year.

For adults, the most popular forms of golf were adventure golf and 18 hole courses. Children were also most likely to have played adventure golf.

Base numbers shown in brackets. To offset sample bias, involvement is counted if participation frequency is more than twice in the last year.
GOLF ACTIVES | How many people?

- **1.2m** ADULTS
  ADVENTURE GOLF
  +0.3m 6–17y.o.

- **1.1m** ADULTS
  18 HOLE COURSE
  +0.1m 6–17y.o.

- **0.7m** ADULTS
  9 HOLE COURSE
  +75k 6–17y.o.

- **0.6m** ADULTS
  DRIVING RANGE
  +64k 6–17y.o.

- **0.6m** ADULTS
  GOLF COMPUTER GAMES
  +135k 6–17y.o.

- **3.2m** ADULTS
  HAVE SOME INVOLVEMENT IN AT LEAST ONE OF THESE FORMS OF GOLF
  +0.6m 6–17 year olds

- **0.8m** ADULTS
  ANY OTHER
  +0.1m 6–17y.o.

- **0.2m** ADULTS
  SCHOOL
  +75k 6–17y.o.

- **0.2m** ADULTS
  PAR 3 / SHORT
  +43k 6–17y.o.

- **0.4m** ADULTS
  SIMULATOR
  +66k 6–17y.o.

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

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GOLF ACTIVITY | Frequency of participation

Adults

- Adults who had played on an 18 hole course or a driving range had done so around once a month in the last year

<table>
<thead>
<tr>
<th>Activity</th>
<th>Frequency</th>
<th>Confidence Interval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adventure Golf (610)</td>
<td>3.2</td>
<td>2.9 - 3.5</td>
</tr>
<tr>
<td>18 hole course (348)</td>
<td>11.8</td>
<td>10.8 - 12.8</td>
</tr>
<tr>
<td>9 hole course (223)</td>
<td>8.2</td>
<td>7.3 - 9.1</td>
</tr>
<tr>
<td>Golf computer games (218)</td>
<td>7.0</td>
<td>6.3 - 7.7</td>
</tr>
<tr>
<td>Driving Range (200)</td>
<td>7.0</td>
<td>6.3 - 7.7</td>
</tr>
<tr>
<td>Putting green (176)</td>
<td>9.6</td>
<td>8.6 - 10.6</td>
</tr>
<tr>
<td>Golf simulator (169)</td>
<td>4.4</td>
<td>3.8 - 5.1</td>
</tr>
<tr>
<td>Pitch and Putt (141)</td>
<td>8.6</td>
<td>7.9 - 9.3</td>
</tr>
<tr>
<td>Par 3 / short course (103)</td>
<td>4.2</td>
<td>3.5 - 5.0</td>
</tr>
<tr>
<td>Golf in school (93)</td>
<td>5.8</td>
<td>5.0 - 6.6</td>
</tr>
<tr>
<td>Any other golf (351)</td>
<td>5.2</td>
<td>4.5 - 5.9</td>
</tr>
</tbody>
</table>

Children

- Junior golf participants had played golf in school and computer games most frequently in the last year

<table>
<thead>
<tr>
<th>Activity</th>
<th>Frequency</th>
<th>Confidence Interval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adventure Golf (294)</td>
<td>3.8</td>
<td>3.3 - 4.3</td>
</tr>
<tr>
<td>18 hole course (97)</td>
<td>4.3</td>
<td>3.7 - 4.9</td>
</tr>
<tr>
<td>9 hole course (70)</td>
<td>3.5</td>
<td>2.9 - 4.1</td>
</tr>
<tr>
<td>Golf computer games (88)</td>
<td>7.2</td>
<td>6.5 - 7.9</td>
</tr>
<tr>
<td>Driving Range (54)</td>
<td>3.9</td>
<td>3.2 - 4.6</td>
</tr>
<tr>
<td>Putting green (50)</td>
<td>4.4</td>
<td>3.8 - 5.0</td>
</tr>
<tr>
<td>Golf simulator (63)</td>
<td>3.2</td>
<td>2.6 - 3.8</td>
</tr>
<tr>
<td>Pitch and Putt (57)</td>
<td>4.0</td>
<td>3.4 - 4.6</td>
</tr>
<tr>
<td>Par 3 / short course (46)</td>
<td>3.8</td>
<td>3.1 - 4.4</td>
</tr>
<tr>
<td>Golf in school (65)</td>
<td>8.3</td>
<td>7.6 - 9.0</td>
</tr>
<tr>
<td>Any other golf (129)</td>
<td>6.1</td>
<td>5.4 - 6.8</td>
</tr>
</tbody>
</table>

Base numbers shown in brackets

All mentions of participation have been included in average frequency calculations
GOLF ACTIVITY | Profiling

Male | Female
--- | ---
52% | 29%
48% | 71%
41% | 59%
37% | 63%

General population (10000) | Played 18 hole course (201) | Golf activity but not 18 hole (398) | Any golf activity (599)

18-34 | 35-54 | 55+
--- | --- | ---
36% | 34% | 24%
38% | 36% | 45%
26% | 30% | 31%
27% | 42% | 31%

- Up to €30k
- €30k-€50k
- €50k-€70k
- €70k+

General population (8874)
Played 18 hole course (190)
Golf activity but not 18 hole (354)
Any golf activity (544)

44% | 27% | 13% | 15%
19% | 21% | 17% | 43%
34% | 27% | 18% | 21%
29% | 25% | 18% | 28%

Base numbers shown in brackets
To offset sample bias, involvement is counted if participation frequency is more than twice in the last year
GOLF | LAPSED & NON GOLFERS
SUMMARY | Lapsed & non golfers

- 15% of those who had no involvement in golf over the last year actually had involvement with golf more than a year ago

- These lapsed golfers were most likely to have played golf computer games (37%) although one in five had previously played on an 18 hole course

- Friends having stopped playing was the number one reason stated for lapsed golfers not playing currently
  - Cost implications were the next most cited reasons with over 20 a quarter of lapsed golfers stating membership as being too expensive and a further fifth stating both equipment and green fees as being too expensive

- Just over a third of lapsed golfers and 5% of non golfers did not dismiss the idea of taking part in golf again in the future

- Full length golf courses were the most popular amongst both groups although Adventure Golf was also rated highly
  - Over a third of lapsed golfers who would consider participating in golf in the future, stated that 18 hole golf was appealing to them
Of those with no golf involvement in the last year...

Had involvement with golf between 1 and 5 years ago: 15%
Had no involvement with golf in the last 5 years: 85%

Lapsed golfers: 37%
Non golfers: 63%

What forms of golf?
- Golf computer games: 37%
- 18 hole course: 21%
- Adventure Golf: 17%
- 9 hole course: 17%
- Driving Range: 11%
- Golf simulator: 10%
- Putting green: 7%
- Pitch and Putt: 5%
- Par 3 / short course: 4%
- Golf in school: 4%
- Any other form of golf: 17%

Base: 8728
Lapsed and non golfer base added to golfer base size will not total 10000 due to frequency exclusions
Base: 1324
LAPSED GOLFERS | Reasons for non involvement

- My friends have stopped playing (29%)
- Membership too expensive (28%)
- Golf equipment too expensive (20%)
- Green fees too expensive (19%)
- Work Commitments (18%)
- Family Commitments (14%)
- Golf Club atmosphere, etiquette & dress code is a put-off (11%)
- Illness / Injury (10%)
- Poor Weather – Cold (9%)
- Poor Weather – Rain (8%)
- It’s hard to find people to play with (6%)
- I have replaced golf with another passion/sport/hobby (6%)

Friends having stopped playing and perceptions of membership being too expensive are the main reasons for lapsed golfers having not participated in the last year.

Only a small proportion of lapsed golfers had replaced golf with another sport or hobby.

Base: 1324

A lapsed golfer is someone who has taken part in golf activities within the last 5 years, but not within the last year.

A non golfer is someone who has not taken part in any golf activities in the past 5 years.
LAPSED & NON GOLFERS | Profiling

Base: General population: 10000, Lapsed golfers: 1324, Non-golfers: 7404

A lapsed golfer is someone who has taken part in golf activities within the last 5 years, but not within the last year
A non golfer is someone who has not taken part in any golf activities in the past 5 years
LAPSED & NON GOLFERS | Future potential

Lapsed golfers

- Overall: 12% (Very likely), 15% (Fairly likely), 23% (Neither likely nor unlikely), 23% (Not very likely), 12% (Not at all likely), Mean (1-5): 3.1
- Male: 10% (Very likely), 24% (Fairly likely), 24% (Neither likely nor unlikely), 24% (Not very likely), 10% (Not at all likely), Mean (1-5): 2.2
- Female: 16% (Very likely), 15% (Fairly likely), 21% (Neither likely nor unlikely), 21% (Not very likely), 11% (Not at all likely), Mean (1-5): 2.8
- 18-34: 8% (Very likely), 15% (Fairly likely), 24% (Neither likely nor unlikely), 24% (Not very likely), 11% (Not at all likely), Mean (1-5): 2.2
- 35-54: 11% (Very likely), 15% (Fairly likely), 24% (Neither likely nor unlikely), 24% (Not very likely), 10% (Not at all likely), Mean (1-5): 2.2
- 55+: 10% (Very likely), 23% (Fairly likely), 24% (Neither likely nor unlikely), 23% (Not very likely), 11% (Not at all likely), Mean (1-5): 2.2

Non golfers

- Overall: 4% (Very likely), 12% (Fairly likely), 21% (Neither likely nor unlikely), 23% (Not very likely), 14% (Not at all likely), Mean (1-5): 1.7
- Male: 5% (Very likely), 13% (Fairly likely), 23% (Neither likely nor unlikely), 19% (Not very likely), 14% (Not at all likely), Mean (1-5): 1.7
- Female: 4% (Very likely), 12% (Fairly likely), 19% (Neither likely nor unlikely), 23% (Not very likely), 14% (Not at all likely), Mean (1-5): 1.6
- 18-34: 6% (Very likely), 14% (Fairly likely), 21% (Neither likely nor unlikely), 19% (Not very likely), 14% (Not at all likely), Mean (1-5): 1.8
- 35-54: 5% (Very likely), 14% (Fairly likely), 23% (Neither likely nor unlikely), 20% (Not very likely), 14% (Not at all likely), Mean (1-5): 1.7
- 55+: 10% (Very likely), 20% (Fairly likely), 20% (Neither likely nor unlikely), 20% (Not very likely), 10% (Not at all likely), Mean (1-5): 1.6

Base numbers shown in brackets

A lapsed golfer is someone who has taken part in golf activities within the last 5 years, but not within the last year.
A non golfer is someone who has not taken part in any golf activities in the past 5 years.
LAPSED & NON GOLFERS | Future appeal

Amongst lapsed and non-golfers who said they were very likely, fairly likely or neither likely not unlikely to take part in a golfing activity in the next year, adventure golf, 18 and 9 hole courses were the most appealing forms of the game.

Lapsed golfers were more likely than non-golfers to engage with golf through play on an 18 hole course.

Base numbers shown in brackets

A lapsed golfer is someone who has taken part in golf activities within the last 5 years, but not within the last year.

A non golfer is someone who has not taken part in any golf activities in the past 5 years.
### Lapsed & Non Golfers | Drivers to participation

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>More of my friends taking up the game</td>
<td>18%</td>
</tr>
<tr>
<td>Cheaper memberships at golf clubs and golf venues</td>
<td>17%</td>
</tr>
<tr>
<td>Cheaper green fees at golf clubs and golf venues</td>
<td>16%</td>
</tr>
<tr>
<td>Cheaper equipment</td>
<td>15%</td>
</tr>
<tr>
<td>Less formal rules (e.g., dress code, mobile phone use)</td>
<td>13%</td>
</tr>
<tr>
<td>Better weather</td>
<td>8%</td>
</tr>
<tr>
<td>More welcoming attitude at golf clubs</td>
<td>8%</td>
</tr>
<tr>
<td>Improved health</td>
<td>6%</td>
</tr>
<tr>
<td>Different formats of the game e.g., Adventure Golf</td>
<td>6%</td>
</tr>
<tr>
<td>Shorter formats of the game</td>
<td>5%</td>
</tr>
<tr>
<td>Clubs making it easier to find matches/people to play</td>
<td>5%</td>
</tr>
<tr>
<td>Opportunity to take part via computer games and consoles</td>
<td>5%</td>
</tr>
<tr>
<td>New formats of the game such as indoor golf simulators</td>
<td>4%</td>
</tr>
</tbody>
</table>

Nearly a fifth said they would be encouraged to play more golf if their friends took up the game.

Initiatives and formats to enable and encourage play with friends may be beneficial in growing golf.

Reducing the cost of membership, green fees and equipment was a main driver that would encourage lapsed and non-golfers to consider taking part in future.

34% said that nothing would encourage them to take up golf in any form.

Base: 8728

A lapsed golfer is someone who has taken part in golf activities within the last 5 years, but not within the last year.

A non-golfer is someone who has not taken part in any golf activities in the past 5 years.
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