INTRODUCTION | Contents

- INTRODUCTION
  - Contents
  - Objectives & Key questions
  - Methodology
  - Summary

- SETTING THE SCENE
  - Leisure activities
  - Sports activities
  - Participation frequency

- PERCEPTIONS
  - Sports perceptions
  - Golf perceptions

- COMPLETE GOLF ACTIVITY
  - Types of golf
  - How many people?
  - Frequency of participation
  - Profiling

- LAPSED & NON GOLFERS
  - Previous involvement
  - Reasons for non-involvement
  - Profiling
  - Future potential
  - Drivers to participation

- CONTACT DETAILS
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 FRANCE 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 France
  - 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>Number of interviews</th>
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<tr>
<td>Male</td>
</tr>
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<tr>
<td>Female</td>
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<td>2868</td>
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<tr>
<td>50k+</td>
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<td>1472</td>
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</table>
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 the golf courses in France continue to be dominated by the older, more affluent sector of the population, the wider definition of golf uncovers a greater variety of golfer types
  - Younger people have a strong presence
  - Adventure golf is attractive to a wide range of individuals including current non-golfers

- The wider definition of golf leads to a total French adult golfer figure of 1.2 million
  - Of these, only 570 thousand are full length golf course users
  - There are a further 0.3 million junior golfers

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

- There is a challenge and opportunity to change perceptions by promoting the wider forms of golf and how they appeal to a wider cross-section of the population
SETTING THE SCENE | SPORTS & LEISURE ACTIVITIES
LEISURE ACTIVITIES | Top 15

**Adults**
- Cinema/Movies: 56%
- Reading: 54%
- Cooking: 50%
- Dining out: 48%
- DIY/Home improvement: 44%
- Gardening: 40%
- Social media interaction: 36%
- Walking (recreational): 36%
- Exercise/keeping fit: 26%
- Crafts / Creativity: 21%
- Watching sport: 21%
- Theatre: 13%
- Fishing: 9%
- Playing an instrument: 9%
- Dancing: 8%

**Children**
- Cinema/Movies: 59%
- Reading: 37%
- Cooking: 22%
- Dining out: 19%
- DIY/Home improvement: 11%
- Gardening: 11%
- Social media interaction: 30%
- Walking (recreational): 15%
- Exercise/keeping fit: 14%
- Crafts / Creativity: 16%
- Watching sport: 14%
- Theatre: 6%
- Fishing: 7%
- Playing an instrument: 14%
- Dancing: 19%

Cinema, reading and cooking were the top three leisure pursuits for adults in France.
Individual sports activities – swimming, running and cycling were the most popular amongst adults in France.
SPORTS ACTIVITIES | Participation frequency

### Adults
- Swimming (2466) 25.9
- Running/Jogging (1850) 42.9
- Cycling (1670) 34.9
- Health & fitness classes (1425) 44.9
- Gym / health club (1424) 50.7
- Boules (1414) 13
- Football/Soccer (1074) 19.6
- Skiing (991) 5.9
- Tennis (882) 17.7
- Table Tennis (824) 12.9
- Badminton (787) 13.1
- Yoga (663) 34.1
- Nordic Walking (601) 35.4
- Basketball (537) 15.9

### Children
- Swimming (913) 24.8
- Running/Jogging (447) 25.1
- Cycling (384) 26.9
- Health & fitness classes (128) 25.7
- Gym / health club (221) 34.7
- Boules (179) 8.3
- Football/Soccer (661) 36.1
- Skiing (371) 7.1
- Tennis (279) 25.7
- Table Tennis (286) 18.6
- Badminton (361) 15.7
- Yoga (40) 14.8
- Nordic Walking (59) 14.4
- Basketball (394) 25.3

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

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

- However, there is an overriding negative perception of the sport amongst the French population with golf being perceived as
  - Boring and stuffy
  - Not a good sport for younger people
  - Not a sociable sport or one that offers good exercise

- 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’
  - 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
- Is a good sport for people of different ages to play together
- Is a good sport for men and women to do together
- Is a good sport for people of varying ability to do together

Base: 10000
SPORTS PERCEPTIONS

- Is boring
- Is challenging
- Is stuffy

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

Base: 10000
## GOLF PERCEPTIONS

<table>
<thead>
<tr>
<th>Perception</th>
<th>Golfers (310)</th>
<th>Lapsed / Non golfers (9400)</th>
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</thead>
<tbody>
<tr>
<td>A good sport for younger people</td>
<td>47%</td>
<td>15%</td>
</tr>
<tr>
<td>A good sport for older people</td>
<td>75%</td>
<td>45%</td>
</tr>
<tr>
<td>A sport for people like me</td>
<td>65%</td>
<td>24%</td>
</tr>
<tr>
<td>A good sport for people of different ages to play together</td>
<td>70%</td>
<td>48%</td>
</tr>
<tr>
<td>A good sport for men and women to do together</td>
<td>51%</td>
<td>43%</td>
</tr>
<tr>
<td>A good sport for people of varying ability to do together</td>
<td>54%</td>
<td>16%</td>
</tr>
</tbody>
</table>

Base numbers shown in brackets
SUMMARY  | Complete golf activity

- Using the broader participation definition, only 3% of the French population had engaged with some form of golf over the last 12 months
  - For adults the most popular form of golf was an 18 hole course and a putting green, while children were most likely to have been to adventure golf

- This equates to 1.2 million adults, and a further 0.3 million juniors in France

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

- The gender split between those who had played an 18 hole course and those who had engaged in another form of golf activity was consistent with a 69:31 (male : female) divide

- Those engaging in other golf activity (not 18 hole) were far more likely to be younger and of a lower income band.
**GOLF ACTIVITY | Types of golf**

**Adults (10000)**
- No golf activity 97%
- Some golf activity 3.1%

**Children (4446)**
- No golf activity 97%
- Some golf activity 3.4%

3% of adults and 3% of children in France had taken part in some form of golf activity in the last year.

For adults the most popular forms of golf were 18 hole courses and the putting green, while children were 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
HAVE SOME INVOLVEMENT IN AT LEAST ONE OF THESE FORMS OF GOLF
+0.3m 6–17 year olds

570k ADULTS
18 HOLE COURSE
+90k 6–17y.o.

530k ADULTS
PUTTING GREEN
+70k 6–17y.o.

480k ADULTS
ADVENTURE GOLF
+170k 6–17y.o.

450k ADULTS
DRIVING RANGE
+60k 6–17y.o.

430k ADULTS
GOLF COMPUTER GAMES
+100k 6–17y.o.

360k ADULTS
PITCH & PUTT
+60k 6–17y.o.

250k ADULTS
PAR 3 / SHORT
+60k 6–17y.o.

160k ADULTS
GOLF SIMULATOR
+60k 6–17y.o.

120k ADULTS
SCHOOL
+50k 6–17y.o.

110k ADULTS
ANY OTHER
+30k 6–17y.o.

9 HOLE COURSE
+100k 6–17y.o.

400k ADULTS
+60k 6–17y.o.

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

July 4, 2016
GOLF ACTIVITY | Frequency of participation

Adults

- Driving range and 18 hole course use were the most frequent amongst adults who had taken part in these forms of golf in the last year.

Children

- Junior golf participants had played golf computer games most frequently in the last year, followed by golf on a putting green.

Base numbers shown in brackets
All mentions of participation have been included in average frequency calculations
GOLF ACTIVITY | Profiling

- **Male**
  - General population (10000): 47%
  - Played 18 hole course (145): 69%
  - Golf activity but not 18 hole (165): 69%
  - Any golf activity (310): 69%

- **Female**
  - General population (10000): 53%
  - Played 18 hole course (145): 31%
  - Golf activity but not 18 hole (165): 31%
  - Any golf activity (310): 31%

- **Age Distribution**
  - 18-34:
    - General population (10000): 34%
    - Played 18 hole course (145): 38%
    - Golf activity but not 18 hole (165): 28%
    - Any golf activity (310): 23%
  - 35-54:
    - General population (10000): 38%
    - Played 18 hole course (145): 39%
    - Golf activity but not 18 hole (165): 40%
    - Any golf activity (310): 41%
  - 55+:
    - General population (10000): 18%
    - Played 18 hole course (145): 42%
    - Golf activity but not 18 hole (165): 40%
    - Any golf activity (310): 32%

- **Income Distribution**
  - General population (9109):
    - Up to €30k: 52%
    - €30k-€50k: 31%
    - €50k-€70k: 10%
    - €70k+: 6%
  - Played 18 hole course (140):
    - Up to €30k: 13%
    - €30k-€50k: 35%
    - €50k-€70k: 25%
    - €70k+: 27%
  - Golf activity but not 18 hole (156):
    - Up to €30k: 38%
    - €30k-€50k: 32%
    - €50k-€70k: 17%
    - €70k+: 13%
  - Any golf activity (296):
    - Up to €30k: 26%
    - €30k-€50k: 33%
    - €50k-€70k: 21%
    - €70k+: 20%

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 GOLFPERS
SUMMARY | Lapsed & non golfers

- 19% of those who had no involvement in golf over the last year actually had involvement with golf between one and five years ago

- These lapsed golfers were most likely to have played adventure golf or golf computer games
  - ‘Easier’ forms of golf that don’t require great investment or commitment on the part of the player

- Perceived high cost and lack of time are the main factors that had caused these previous golfers to lapse

- Over a third of lapsed golfers and 9% of non golfers did not dismiss the idea of taking part in golf again in the future

- Adventure golf offers the greatest appeal to lapsed and non-golfers alike
  - Lapsed golfers who would consider participating in golf in the future, were also likely to consider a full length course
  - A reduction in costs – membership, green fees and equipment – was most likely to encourage these “maybe one day” golfers back to the sport
LAPSED & NON GOLFERS | Previous involvement

Of those with no golf involvement in the last year...

- Lapsed golfers
  - Had involvement with golf between 1 and 5 years ago (19%)
- Non golfers
  - Had no involvement with golf in the last 5 years (81%)

What forms of golf?

- Adventure Golf (56%)
- Golf computer games (34%)
- 9 hole course (17%)
- 18 hole course (17%)
- Putting green (13%)
- Golf simulator (7%)
- Par 3 / short course (6%)
- Driving Range (6%)
- Pitch and Putt (4%)
- Golf in school (3%)
- Any other form of golf (3%)

Base: 9400  Lapsed and non golfer base added to golfer base size will not total 10000 due to frequency exclusions  Base: 1783
LAPSED GOLFERs | Reasons for non-involvement

Perceptions of high cost around membership, equipment and green fees, and work and family commitments were the main reasons for lapsed golfers not participating in the last year.

- Membership too expensive: 37%
- Golf equipment too expensive: 24%
- Work Commitments: 21%
- Green fees too expensive: 19%
- Family Commitments: 16%
- Golf club atmosphere, etiquette & dress code is a put-off: 12%
- Poor weather - Cold: 11%
- Poor Weather - Rain: 10%
- It is hard to find people to play with: 9%
- Illness / Injury: 7%
- I have replaced golf with another passion, sport, hobby: 5%
- My friends have stopped playing: 4%

Taking up another sport or hobby in place of golf, or stopping golf because friends were no longer playing was only an influencer for a very small proportion of lapsed golfers.

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

<table>
<thead>
<tr>
<th>Audience</th>
<th>Male</th>
<th>Female</th>
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<tbody>
<tr>
<td>General population</td>
<td>53%</td>
<td>47%</td>
</tr>
<tr>
<td>Lapsed golfers</td>
<td>50%</td>
<td>50%</td>
</tr>
<tr>
<td>Non golfers</td>
<td>55%</td>
<td>45%</td>
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<table>
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<tr>
<th>Age Group</th>
<th>18-34</th>
<th>35-54</th>
<th>55+</th>
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<tbody>
<tr>
<td>General population</td>
<td>34%</td>
<td>38%</td>
<td>28%</td>
</tr>
<tr>
<td>Lapsed golfers</td>
<td>16%</td>
<td>50%</td>
<td>38%</td>
</tr>
<tr>
<td>Non golfers</td>
<td>40%</td>
<td>50%</td>
<td>22%</td>
</tr>
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<th>€50k–€70k</th>
<th>€70k+</th>
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<tr>
<td>General population</td>
<td>52%</td>
<td>31%</td>
<td>10%</td>
<td>6%</td>
</tr>
<tr>
<td>Lapsed golfers</td>
<td>48%</td>
<td>31%</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Non golfers</td>
<td>55%</td>
<td>32%</td>
<td>9%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Base: General population: 10000, Lapsed golfers: 1783, Non-golfers: 7617

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 (1783):**
  - Very likely: 27%
  - Fairly likely: 26%
  - Neither likely nor unlikely: 21%
  - Not very likely: 11%
  - Not at all likely: 12%
  - Mean (1-5): 3.1

- **Male (890):**
  - Very likely: 25%
  - Fairly likely: 28%
  - Neither likely nor unlikely: 21%
  - Not very likely: 12%
  - Not at all likely: 13%
  - Mean (1-5): 3.0

- **Female (893):**
  - Very likely: 25%
  - Fairly likely: 25%
  - Neither likely nor unlikely: 21%
  - Not very likely: 12%
  - Not at all likely: 10%
  - Mean (1-5): 3.0

- **18-34 (895):**
  - Very likely: 30%
  - Fairly likely: 27%
  - Neither likely nor unlikely: 26%
  - Not very likely: 12%
  - Not at all likely: 12%
  - Mean (1-5): 3.2

- **35-54 (607):**
  - Very likely: 26%
  - Fairly likely: 25%
  - Neither likely nor unlikely: 24%
  - Not very likely: 18%
  - Not at all likely: 10%
  - Mean (1-5): 3.1

- **55+ (281):**
  - Very likely: 26%
  - Fairly likely: 25%
  - Neither likely nor unlikely: 21%
  - Not very likely: 11%
  - Not at all likely: 9%
  - Mean (1-5): 3.1

**Non golfers**

- **Overall (7617):**
  - Very likely: 22%
  - Fairly likely: 14%
  - Neither likely nor unlikely: 16%
  - Not very likely: 26%
  - Not at all likely: 20%
  - Mean (1-5): 4.9

- **Male (3443):**
  - Very likely: 22%
  - Fairly likely: 17%
  - Neither likely nor unlikely: 14%
  - Not very likely: 26%
  - Not at all likely: 16%
  - Mean (1-5): 4.9

- **Female (4174):**
  - Very likely: 21%
  - Fairly likely: 17%
  - Neither likely nor unlikely: 26%
  - Not very likely: 22%
  - Not at all likely: 20%
  - Mean (1-5): 4.9

- **18-34 (1702):**
  - Very likely: 21%
  - Fairly likely: 18%
  - Neither likely nor unlikely: 26%
  - Not very likely: 22%
  - Not at all likely: 18%
  - Mean (1-5): 4.8

- **35-54 (2906):**
  - Very likely: 14%
  - Fairly likely: 17%
  - Neither likely nor unlikely: 26%
  - Not very likely: 22%
  - Not at all likely: 18%
  - Mean (1-5): 4.8

- **55+ (3009):**
  - Very likely: 13%
  - Fairly likely: 16%
  - Neither likely nor unlikely: 20%
  - Not very likely: 22%
  - Not at all likely: 13%
  - Mean (1-5): 4.7

**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 nor unlikely to take part in a golfing activity in the next year, adventure golf was the most appealing form of golf going forward.

Golf on an 18 hole course was also appealing for lapsed golfers – who already have some experience of the sport.

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.

Base numbers shown in brackets.
LAPSED & NON GOLFERS | Drivers to participation

- Cheaper equipment: 27%
- Cheaper memberships at golf clubs and golf venues: 26%
- More of my friends taking up the game: 16%
- Cheaper green fees at golf clubs and golf venues: 13%
- Less formal rules (e.g., dress code, mobile phone use): 12%
- Better weather: 10%
- More welcoming attitude at golf clubs: 10%
- Different formats of the game e.g., Adventure Golf: 8%
- Shorter formats of the game: 8%
- Improved health: 6%
- Clubs making it easier to find matches/people to play: 4%
- Opportunity to take part via computer games and consoles: 4%
- New formats of the game such as indoor golf simulators: 4%

21% said that nothing would encourage them to take up golf in any form.

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

Base: 9400

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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