EUROPEAN TOUR

COMPLETE GOLF ACTIVITY SURVEY ITALY

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 ITALY 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

- 10,002 online interviews carried out in Italy
  - 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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<tbody>
<tr>
<td>Male</td>
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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 the golf courses in Italy continue to be dominated by affluent males, the wider definition of golf uncovers a greater variety of golfer types
  - Women and lower social groups have a strong presence

- The wider definition of golf leads to a total Italian adult golfer figure of **993 thousand**
  - Of these, only 430 thousand are full length golf course users
  - There are a further **181 thousand** 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: 59%
- Cinema/Movies: 52%
- Walking (recreational): 49%
- Cooking: 48%
- Dining out: 39%
- Exercise/keeping fit: 38%
- Social media interaction: 37%
- DIY/Home improvement: 36%
- Gardening: 34%
- Watching sport: 33%
- Theatre: 17%
- Crafts / Creativity: 16%
- Playing an instruments: 10%
- Fishing: 9%
- Skateboarding: 2%

Children
- Reading: 36%
- Cinema/Movies: 41%
- Walking (recreational): 25%
- Cooking: 11%
- Dining out: 16%
- Exercise/keeping fit: 23%
- Social media interaction: 27%
- DIY/Home improvement: 6%
- Gardening: 6%
- Watching sport: 25%
- Theatre: 6%
- Crafts / Creativity: 7%
- Playing an instruments: 17%
- Fishing: 7%
- Skateboarding: 6%

Adults in Italy were most likely to have taken part in reading, going to the cinema and recreational walking in the past 12 months.
**SPORTS ACTIVITIES | Top 15**

**Adults**
- Going to gym / health club: 28%
- Running / Jogging: 23%
- Swimming: 23%
- Football / Soccer: 17%
- Health and fitness classes: 16%
- Cycling: 15%
- Tennis: 11%
- Skiing: 9%
- Volleyball: 9%
- Yoga: 9%
- Table Tennis: 7%
- Basketball: 6%
- Nordic Walking: 6%
- Boules: 4%
- All golf*: 4%

**Children**
- Going to gym / health club: 36%
- Swimming: 25%
- Football / Soccer: 15%
- Health and fitness classes: 11%
- Cycling: 9%
- Tennis: 8%
- Skiing: 7%
- Volleyball: 6%
- Basketball: 4%
- Nordic Walking: 3%
- Boules: 2%
- All golf*: 3%

*Individual sports and fitness activities – going to the gym, running / jogging and swimming, were the most popular amongst adults in Italy*

*Children were most likely to have taken part in swimming and football / soccer*
**SPORTS ACTIVITIES | Participation frequency**

**Adulst**
- Going to gym / health club: 48.8%
- Running/Jogging: 54.1%
- Swimming: 30.7%
- Football/Soccer: 26.5%
- Health & fitness classes: 35.7%
- Cycling: 34.8%
- Tennis: 19.6%
- Skiing: 9.4%
- Volleyball: 18.0%
- Yoga: 36.4%
- Table Tennis: 13.8%
- Basketball: 17.3%
- Nordic Walking: 27.0%
- Boules: 11.1%

**Children**
- Going to gym / health club: 39.7%
- Running/Jogging: 33.2%
- Swimming: 39.4%
- Football/Soccer: 51.4%
- Health & fitness classes: 32.1%
- Cycling: 31.0%
- Tennis: 27.6%
- Skiing: 10.5%
- Volleyball: 36.1%
- Yoga: 20.0%
- Table Tennis: 17.2%
- Basketball: 33.9%
- Nordic Walking: 11.5%
- Boules: 6.9%

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

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

- The perception of golf is that the sport is more suitable for older people than younger
  - Golf is seen as more sociable than running, cycling and tennis — but significantly less than football

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

- 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: 10002
SPORTS PERCEPTIONS

- is boring
- is challenging
- is stuffy

- is a sociable sport
- offers good exercise
- has broad appeal

Base: 10002
GOLF PERCEPTIONS

- Is a good sport for younger people: 41% (Golfers), 13% (Lapsed/Non golfers)
- Is a good sport for older people: 63% (Golfers), 74% (Lapsed/Non golfers)
- Is a sport for people like me: 50% (Golfers), 12% (Lapsed/Non golfers)
- Is a good sport for people of different ages to play together: 58% (Golfers), 45% (Lapsed/Non golfers)
- Is a good sport for men and women to do together: 63% (Golfers), 51% (Lapsed/Non golfers)
- Is a good sport for people of varying ability to do together: 45% (Golfers), 29% (Lapsed/Non golfers)

- Is boring: 15% (Golfers), 53% (Lapsed/Non golfers)
- Is challenging: 31% (Golfers), 23% (Lapsed/Non golfers)
- Is stuffy: 19% (Golfers), 32% (Lapsed/Non golfers)
- Is a sociable sport: 50% (Golfers), 34% (Lapsed/Non golfers)
- Offers good exercise: 15% (Golfers), 6% (Lapsed/Non golfers)
- Has broad appeal: 28% (Golfers), 10% (Lapsed/Non golfers)

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

- Using the broader participation definition, 3.5% of the adult Italian population had engaged with some form of golf over the last 12 months
  - For adults the most popular forms of golf were full length courses and golf computer games, while children were most likely to have been to adventure golf

- This equates to 993 thousand adults, and a further 181 thousand juniors in Italy

- The most frequent golf activity was seen amongst adults who had been to a putting green, driving range or played golf computer games
  - For juniors, golf computer games were the most frequently played with driving ranges the second most frequently visited

- In Italy, those playing 18 hole courses were predominantly male and in the top socio-economic groups

- Interestingly, despite being perceived as being a sport for older people, the age split of those who had played 18 hole golf or any other form of golf in the last 12 months was younger than that of the general population
GOLF ACTIVITY | Types of golf

Adults (10002)
- No golf activity: 96.5%
- Some golf activity: 3.5%

Children (5128)
- No golf activity: 95.5%
- Some golf activity: 4.5%

3.5% Italy adult population had taken part in some form of golf activity in the last year – for children this was slightly higher at 4.5%

For adults the most popular forms of golf were 18 and 9 hole courses and golf computer games, while children were most likely to have been to adventure golf

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

1. **18 HOLE COURSE**
   - 430k adults
   - 57k 6-17y.o.

2. **GOLF COMPUTER GAMES**
   - 425k adults
   - 83k 6-17y.o.

3. **9 HOLE COURSE**
   - 382k adults
   - 62k 6-17y.o.

4. **DRIVING RANGE**
   - 377k adults
   - 68k 6-17y.o.

5. **ADVENTURE GOLF**
   - 352k adults
   - 101k 6-17y.o.

6. **PAR 3 / SHORT**
   - 262k adults
   - 57k 6-17y.o.

7. **PUTTING GREEN**
   - 222k adults
   - 46k 6-17y.o.

8. **PITCH & PUTT**
   - 205k adults
   - 44k 6-17y.o.

9. **ANY OTHER**
   - 169 adults
   - 42k 6-17y.o.

10. **SCHOOL**
    - 152k adults
    - 48k 6-17y.o.

11. **INDOOR GOLF**
    - 197k adults
    - 53k 6-17y.o.

This graphic shows the absolute number of people who have taken part in each of the categories of golf in the past year, including the broader definition of golf activity.

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

- Adults who had played golf on an 18 hole course had averaged 8 rounds in the past year

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<th>Frequency</th>
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<tr>
<td>9 hole course</td>
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<td>Driving range</td>
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<td>Adventure golf</td>
<td>4.9</td>
</tr>
<tr>
<td>Par 3/short course</td>
<td>7.0</td>
</tr>
<tr>
<td>Putting green</td>
<td>10.3</td>
</tr>
<tr>
<td>Pitch and Putt</td>
<td>7.9</td>
</tr>
<tr>
<td>Indoor Golf simulator</td>
<td>6.9</td>
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<tr>
<td>Golf in school</td>
<td>5.6</td>
</tr>
<tr>
<td>Any other golf</td>
<td>4.3</td>
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</table>

Children

- Junior golf participants had played golf computer games most frequently in the last year – an average of 9.4 times

<table>
<thead>
<tr>
<th>Activity</th>
<th>Frequency</th>
</tr>
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<tbody>
<tr>
<td>18 hole course</td>
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<tr>
<td>Golf computer games</td>
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<td>9 hole course</td>
<td>5.7</td>
</tr>
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<td>Driving range</td>
<td>8.5</td>
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<td>Adventure golf</td>
<td>5.2</td>
</tr>
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<td>Par 3/short course</td>
<td>5.8</td>
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<tr>
<td>Putting green</td>
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<tr>
<td>Pitch and Putt</td>
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<td>Golf in school</td>
<td>6.8</td>
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<tr>
<td>Any other golf</td>
<td>4.7</td>
</tr>
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</table>

Base numbers shown in brackets

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

Male | Female
---|---
52% | 30%
48% | 70%
43% | 58%
37% | 63%

18-34 | 35-54 | 55+
---|---|---
25% | 45% | 30%
17% | 48% | 35%
12% | 50% | 39%
14% | 49% | 37%

General population (10002) | Played 18 hole course (153) | Golf activity but not 18 hole (200) | Any golf activity (353)
---|---|---|---
Up to €30k | €30k-€50k | €50k-€70k | €70k+
---|---|---|---
General population (8692)
53% | 27% | 11% | 9%
Played 18 hole course (140)
21% | 18% | 19% | 42%
Golf activity but not 18 hole (187)
31% | 25% | 16% | 29%
Any golf activity (327)
27% | 22% | 17% | 35%

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

- 26% of those who had no involvement in golf over the last year actually had involvement with golf between one and five years ago.

- The majority of these lapsed golfers were people who had previously played golf computer games.

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

- 32% of lapsed golfers and 10% of non golfers did not dismiss the idea of taking part in golf again in the future.

- Traditional forms of the game are seen to have the most appeal with driving ranges and full length golf courses appealing to lapsed and non-golfers alike.

- A reduction in costs — membership, green fees and equipment — and having more friends take up golf were the 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
26%

Had no involvement with golf in the last 5 years
74%

What forms of golf?

46% Golf computer games
19% 18 hole course
17% 9 hole course
15% Driving range
15% Golf simulator
14% Adventure golf
10% Par 3/short course
4% Golf in school
3% Pitch and Putt
3% Putting green
11% Any other form of golf

Base: 9338  Lapsed and non golfer base added to golfer base size will not total 10002 due to frequency exclusions  Base: 2458

July 4, 2016
LAPSED GOLFERS | Reasons for non involvement

Perceptions of high cost, work commitments and difficulty finding golf partners were the main reasons for lapsed golfers having not participated in the last year.

Being put off by golf club atmosphere, etiquette and dress code, or replacing golf with another activity were only influencers for a small proportion of lapsed golfers.

Base: 2458

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: 10002, Lapsed golfers: 2458, Non-golfers: 6880
A lapse 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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<thead>
<tr>
<th></th>
<th>Male</th>
<th>Female</th>
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<tbody>
<tr>
<td>General population</td>
<td>52%</td>
<td>48%</td>
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<tr>
<td>Lapsed golfers</td>
<td>46%</td>
<td>54%</td>
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<tr>
<td>Non golfers</td>
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<td>45%</td>
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<tr>
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<tr>
<td>Non golfers</td>
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<td>27%</td>
<td>10%</td>
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LAPSED & NON GOLFERS | Future potential

**Lapsed golfers**

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**Non golfers**

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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 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, golf at a driving range was the activity they felt would be most appealing in future.

Lapsed golfers were more likely to return to golf on an 18 or 9 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

- Cheaper equipment: 25%
- More of my friends taking up the game: 22%
- Cheaper memberships at golf clubs and golf venues: 20%
- Cheaper green fees at golf clubs and golf venues: 11%
- More welcoming attitude at golf clubs: 10%
- Less formal rules (eg dress code, mobile phone use): 10%
- Better weather: 9%
- Shorter formats of the game: 9%
- Clubs making it easier to find matches/people to play: 6%
- New formats of the game such as indoor golf simulators: 6%
- Opportunity to take part via computer games and consoles: 6%
- Improved health: 4%
- Different formats of the game e.g. Adventure Golf: 4%

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.

The role of friends in golf play was also important. Finding ways to enable groups to start and carry on with golf together would be beneficial.

22% said that nothing would encourage them to take up golf in any form.

Base: 9338

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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