

The Opportunity to Grow Golf: Female Participation



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Dear Reader,

Welcome to *The Opportunity to Grow Golf: Female Participation (2014)*

This report follows on from Syngenta's *Growing Golf in the UK (2013)* study, which was one of the largest and most comprehensive quantitative surveys ever undertaken in the golf industry, canvassing the opinions of more than 3,500 UK residents, including golfers, non-golfers and lapsed players.

The purpose of our ongoing golf market research is to provide golf clubs with market intelligence that informs their decisions on how to retain existing customers and recruit new players, ultimately benefiting the long-term business sustainability of individual golf courses and the UK golf industry as a whole.

What emerged from *Growing Golf in the UK (2013)* were two key growth opportunities for the UK golf course industry to focus on:

- Female participation
- Youth participation

To gain a deeper understanding of these opportunities, Syngenta commissioned further market research studies in spring 2014. This included a series of qualitative focus groups, which form the core of this report, and an additional quantitative survey of 1,500 women.

The face-to-face focus groups, which were conducted at professional market research studios in Edinburgh, Manchester and Wimbledon, were important in better understanding the emotional ties that retain existing female golfers, as well as the emotive responses of non-golfers and lapsed players.

Specifically, the objectives of *The Opportunity to Grow Golf: Female Participation (2014)* were to:

- Identify the reasons why women participate in sport – and how golf could fulfill those needs
- Understand the drivers and reasons why existing female golfers enjoy the sport, the needs it fulfills and the emotional ties
- Learn why female golfers leave the sport
- Better understand factors that may discourage female participation, such as expense and intimidation
- Identify what would lead prospective players to 'take the next step' and commit to becoming a golfer.

Female participation is an important strategic opportunity for golf as a sport and a business. We hope the results of this extensive listening exercise, and our growing portfolio of market research, which is free to download from www.greencast.co.uk, will help golf clubs better understand the wants and needs of existing female golfers as well as prospective players. We will also soon be broadcasting a series of videos featuring case studies of golf courses successfully growing their businesses through encouraging female participation.

We welcome your feedback, ideas and examples of successful initiatives at club level that are helping to grow golf. Please contact us by writing to:

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Simon Elsworth
 Syngenta Head of Turf & Landscape (EAME)



The Opportunity to Grow Golf: Female Participation (2014) is an important and valuable contribution to the efforts being made to inform and support the growth of golf – and is welcomed by the Ladies European Tour.

The reality is that there is a gender imbalance in golf and this is something that needs to be addressed. While progress is being made, much more needs to be done.

This survey highlights that while there are challenges to overcome, there are also practical solutions that, if applied, will enable the sport to grow.

It's interesting to note that 'observing others' and 'watching a televised event' attracted women to an activity. This is particularly relevant to the Ladies European Tour (LET) as we have many positive role models and have experienced a significant increase in TV coverage of our events in recent times.

The LET believes we have a role to play in the development of golf for women and girls. For this reason, we have established a Development Department, a unique approach by a professional tour. Our aim is to work with other organisations and add value to the national development plans of countries around the world.

In doing so, we will use our events and tournaments to support participation initiatives and use LET players to inspire women and girls to take up the sport. By working with other golfing bodies, we aim to encourage participation at national, local and club level.

There are exciting times ahead for women's and girls' golf. The 2015 Solheim Cup at St Leon-Rot Golf Club in Germany, September 18-20, is set to be a world-class sporting event and has the potential to attract a huge international audience of golfers and non-golfers alike. There will also be the PING Junior Solheim Cup, which we hope will inspire future generations of golfers and show that golf is a sport for both sexes and a game for life.

Syngenta's ongoing golf market research will help assist organisations, including The Ladies European Tour, with the development of golf and we are appreciative of Syngenta's efforts and commitment to the long-term sustainability of the sport.

Mike Round
Director of Development & Membership
Ladies European Tour

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“It is very important that we listen to young people and women and better understand what would encourage them to try golf, which is why I was so interested to read this report. As European Solheim Cup Captain, I'm very aware that thousands of sports fans will be watching the event on television and what a great opportunity this is to showcase golf as a game for women. My hope is that it will inspire new players of all ages to give golf a try and see what an enjoyable, social and healthy sport it is.”

Carin Koch, 2015 European Solheim Cup Captain

Methodology

Six focus groups were conducted in February 2014 and were held across the UK in Wimbledon, Manchester and Edinburgh.

Of the six groups, two groups consisted of golfers only, two comprised non-golfers and two focused on lapsed players.

On average, there were eight women in each group representing a mix of ages and demographic classifications.

All of the non-golfers and lapsed golfers participated in at least one other sport or activity on a regular basis. Those with no interest in sport were excluded, as they would be unlikely to engage with the subject matter.

The research was conducted at professional market research studios, with responses observed via two-way mirrors and recorded on video. Each session was facilitated by the same market research professional, who is also an experienced golfer.

Supporting numerical evidence in this report is derived from additional quantitative studies including a survey of 1,500 UK females (February 2014) comprising 750 non-golfers and lapsed players, and 750 golfers, as well as a snapshot survey of female non-golfers in the UK, Germany, Sweden and France.

All work was carried out on behalf of Syngenta by GfK, one of the world's largest and most respected market research agencies. All work complied with the Market Research Society Code of Conduct.



Women & Sport

All of the women who took part in our research participate in at least one other sport or activity. As a foundation to understanding how more women might be encouraged to play golf, we wanted to find out why women took part in their preferred sport, how they became interested in that activity and what the perceived drivers and benefits are.

Reasons to play sport



SOURCE OF RELIEF

Women said that sport gives them an opportunity to think and reflect. It is also a stress reliever, giving them an opportunity to decompress from busy lives. They welcome spending this relaxation time alongside family and friends.



FITNESS

The opportunity to maintain a healthy lifestyle is an important driver for women to take up sport. Our respondents said you need to break into a sweat to gain from the fitness benefits.



TIME OUTDOORS

Spending time outdoors is a strong draw for women, especially with friends and families. (This aligns with previous quantitative research that showed time outdoors was a significant driver to participate in sport – and that women golfers are particularly appreciative of the environmental aspects to courses).



NO PRACTICE NECESSARY

Sports or activities that didn't require having to master a skill or regular practice were appealing. Some women liked all inclusive activities; walking, for example. Our respondents also said they didn't want to have to worry about what they wear or their physical appearance – they didn't want to dress up to relax.

“Running is one of the biggest stress relievers I’ve found. You just solve so many problems when you’re out.”

Non-golfer

“It’s sort of built into our family, that’s how we socialise together, doing sport.”

Lapsed golfer

Sports for women

All of our respondents were active in at least one sport. Many expressed the feeling of being time pressured and that it was difficult to block out large chunks of time for sport.

So accessible sports that they can partake in quickly and easily, which also demand some physical exertion are appealing. Our respondents were especially keen on sports they could do with their families.

The preferred sports and activities of our panellists – and the combined benefits included:



“Accessibility is important. I climb hills because they’re not far away and I go to the gym because it’s local.”
Non-golfer

“Being out in the countryside makes your soul feel good.”
Lapsed golfer

Becoming interested in a new sport

What drew women to another sport – and what can golf learn in terms of what is required to attract women to an activity?

From our quantitative study, more than a third of respondents said ‘observing others’ (with ‘others’ frequently meaning friends or family) playing sport was the first touch point in becoming interested in an activity. The top three factors also included living near a facility and watching a televised event:



“It’s accessibility; you’re attracted if it’s possibly something in your area so you’re not having to travel miles.”
Non-golfer

“My brother has got quite into swimming. He started last year when I was doing 1-mile swims, the open water stuff, and he asked me to come with him.”
Non-golfer

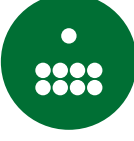
Perceptions of Golf

Among the non-golfers, we wanted to find out how prevalent general social stereotypes relating to golf are. What are the immediate reputational issues that golf must aim to overcome to make the sport more appealing?

When asked what their impressions of golf were, here's what non-golfers said:

-  **A SLOW, BORING GAME**
-  **EXPENSIVE – ONLY FOR HIGHER SOCIAL CLASSES**
-  **MEMBERSHIP REQUIRED – CLUB MENTALITY**
-  **FOR OLDER MEN – MALE DOMINATED**
-  **TIME CONSUMING**
-  **VERY COMPETITIVE**
-  **EMBARRASSING FOR BEGINNERS**
-  **RULES ARE ARDUOUS AND CONFUSING**

However, on reflection more positive factors were expressed:

-  **REQUIRES SKILL, PRECISION AND TECHNICAL IMPROVEMENT**
-  **RELAXING – YOU CAN SWITCH OFF FROM LIFE**
-  **ALLOWS TIME FOR BONDING WITH FRIENDS, FAMILY AND OTHER PLAYERS**
-  **HANDICAP SYSTEM ENSURES LEVEL PLAYING FIELD**

What Makes Women Take Up Golf?

How do the majority of women who do play golf start? Could this provide an insight into successful strategies to attract more female participants?

CHILDREN

Our panellists said that it was often a child's interest in the game – and a mother's desire to spend time with their children – that influenced them to start golf.

FATHERS

Among the women who had been playing golf for most of their lives, fathers and uncles were the primary introducer.

PARTNERS

Women whose partners play golf take up the sport to spend more time with them. (Conversely, among the lapsed players, one of the reasons they gave up golf was to spend more time with their partners).

SOCIAL

Some golfers in our focus groups said they started because they wanted to play a sport that was less impactful on the body and could be combined with social activities.

FRIENDS

Players are often introduced – or re-introduced – to golf by their friends.

Female golfers expressed how, once settled in a club, they make the most of social opportunities and meeting people, resulting in regular, weekly games. This often happens once their children move away from home or have lost interest in golf.



What Appeals to Women about Golf?

Having learned how women get into golf, we wanted to find out what sustained their interest and kept them engaged in the sport.

The golfers in the focus groups described the following positive factors:



TIME WITH FAMILY AND FRIENDS

“I really enjoy it - I can have good days and bad days, but it's really sociable and we just have great fun chatting our way around the golf course.”

Golfer



SOCIALISING OUTDOORS

“The best bit for me is the fact it's probably the only sport that I'm improving as I'm getting older.”

Golfer



ABILITY TO IMPROVE
(no matter of age)

“One of my children was fanatical about golf, and I thought as he got older it might be something we could do together.”

Golfer



STRESS RELIEF



FRIENDLY COMPETITION

“I like it because I find it really relaxing after being with the children all week, to go out on the golf course, you're walking about, you're in the fresh air.”

Golfer



COMPETE WITH ALL SKILL LEVELS
(handicap system)

European Snapshot: Does Golf Appeal to Women?

In addition to speaking to focus groups in the UK, we wanted to get a sense of how appealing golf is to women across Europe.

In April 2014, we carried out a quantitative survey of non-golfer females in the mature European golf markets of Germany, Sweden and France, as well as the UK, and asked, 'How interested are you in taking up golf this summer?'

The following statistics represent:

- Percentage of respondents who said they were "very interested in taking up golf this summer"
- Equivalent number of prospective golfers, based on population size

FRANCE	GERMANY	SWEDEN	UK
7.4%	5.2%	4.2%	5.0%
986,000	955,000	68,000	640,000

Of course, it is unlikely that the women who said they were very interested in golf would then have systematically taken up the sport, as there are multiple factors that would encourage or discourage potential customer engagement. However, the results serve as an indication of the strong potential to grow golf through female participation.



What's Stopping Women Taking Up Golf?

So what is actually stopping women from taking up golf? What are the perceived barriers that prevent them taking the next step?

MALE DOMINATED SPORT

Golf is not only perceived to be a male-dominated sport, it is also seen as unwelcoming to women, especially female beginners. The low profile of women at golf clubs and the predominance of men's golf on TV re-enforces this perception.

GOLF IS ELITIST

To non-golfers, the sport is perceived as almost a hereditary activity; if you were raised as a golfer, you will play golf, but if you didn't grow up around golf, it's not for you.

REQUIRES LESSONS & PRACTICE

It's seen as a game that can't be easily taken up; golf requires money and time to start out. Women are afraid of looking like beginners and, without the ability to practice at home or in their own space, fear they won't progress.

MUST BELONG TO A CLUB

Non-golfers believe you have to be a member of a club to have lessons and start golf. The perception is that it is difficult to get started in golf and taster sessions are not readily available.

“It's the etiquette; what you wear, what you do, what's acceptable, what's not. You go out for a run and you can wear what you like, it really doesn't matter.”

Non-golfer

“It seems a bigger commitment to try golf out than to go to the gym or try a dance class. You have to spend money on clubs or getting the golf clothes – that's a huge commitment in itself.”

Non-golfer

INTIMIDATING CLUB ATMOSPHERE

Clubs are seen as intimidating places, especially to outsiders. Women are concerned that they won't know the club rules and that etiquette, although accepted as potentially positive, can be off-putting. Women are also concerned they won't have the skill to play and enjoy golf.

LACK OF ADAPTABILITY

Golf is seen as an individual sport that could be less fun or social than a team game. The lack of scalability i.e. having to play a full length course rather than a shorter or different format reduces golf's appeal.

COMMITMENT AND COST

Women perceive that to take up golf you have to join a club and that the combination of membership fees and equipment makes it expensive, and more than they are willing to commit to.

WEATHER DEPENDENT

Women see golf as a fair weather sport and that it is not a game you'd play all year round.

“I don't know why it is, but golf seems to be something that you have to have a level of skill to be able to even go out and try.”

Non-golfer (17-18 age group)

“I would feel like they might not want me to be there even though it's public I'd feel intimidated.”

Non-golfer (17-18 age group)

Why do Women Leave Golf?

Next, we asked the lapsed players in our focus group why they had left golf. Here's what they said:



COST

The combination of membership fees and increasing annual dues, as well as tuition costs, resulted in some women giving up golf.



COMMITMENT

The time it takes to play 18 holes, including drive time to and from the course, and the feeling you have to participate in club functions put some women off.

SNOBBERY



Among those who have given up golf, there was a sense that it was hard to fit in at a club and that burdensome rules, etiquette and strict dress codes were off-putting.

Club culture and not feeling like a member was an important theme to emerge from the discussion groups. Lapsed players and non-golfers alike perceive, or have experienced, pretentious and stuffy clubs. A common theme was the presence of cliques within clubs and the difficulty some individuals felt in being accepted.

“What I didn't like about it was the whole pretentiousness of it and the rules. I don't like being told this is how you should behave.”

Lapsed golfer

“You've got to have commitment. If you're going to join a club for 12 months, you've got to be committed for 12 months.”

Lapsed golfer

“At my gym you can have a membership or a day pass, but you have equal rights. If you're a member, it doesn't give you a right to be rude to people.”

Lapsed golfer

“The members didn't want new people in. They thought, 'It's going to be busier; they're going to take my tee time.’”

Lapsed golfer

Do Women Find Golf Clubs Intimidating?

Intimidation is a factor that has recurred frequently in our research. While some lapsed players suggest they have experienced intimidation, and non-golfers fear a club is an intimidating place, do golfers also experience intimidation?



LAPSED GOLFERS

Most lapsed golfers have experienced the irritation of fellow members due to their inability to play the game at a higher level, creating stressful situations. However, their confidence grew when they played with better players who are also friends.



NON-GOLFERS

The perception among non-golfers is that they would be pushed by more able golfers. They said they would be nervous and feel the threat of embarrassment about walking onto a course for the first time or being observed by regular players who were more experienced and skillful.



GOLFERS

Most club members said they did not feel intimidation and are comfortable about their standing at the club – and would not tolerate intimidation from other members. However, some reported the hard time junior golfers can be given by other members (when they should be encouraging young players). Some also said they sometimes felt intimidated by members at other clubs, when visiting.



What Would Encourage Female Golfers to Play More?

How do clubs and courses stop existing female players drifting away and leaving golf? We asked the golfers in our group what would enhance their golfing experience and better engage them in the sport?



FLEXIBLE PLAY

The ability to choose how many holes they play – 18, 9 or even 6 holes – would give our golfers more options around when to play golf.



PLAY OTHER COURSES

The respondents said they would like to see reciprocal deals with other courses, enabling them to play (for free) at other venues.



BETTER WEATHER

The women's responses underlined golf's dependence on the weather and confirmed that, for women, it is primarily a fair weather sport.



LESS MASCULINE ENVIRONMENT

Women would be encouraged to play more golf if clubs were less male dominated and more female friendly.



MORE FRIENDS WHO PLAY

The importance of participating in sport or an activity with friends was underlined – women would play more golf if more of their friends played.



FRIENDLIER ATMOSPHERE

Once again, the intimidating side of club culture, rules and etiquette, was apparent – women want to be made welcome and feel like valued customers.



EASIER ACCESS

The golfers in our focus groups all live in cities or metropolitan areas. For them, easier access to courses, near train or tube stations, would help them play more.



NOTHING

Some of the golfers said nothing would encourage them to play more – they already play as much as they are able to.

“Just having another friend to go out and play with me.”

Golfer

“If there was a group of us then it would be a lot easier because it's a social thing.”

Golfer



What Would Encourage Lapsed Players and Non-Golfers to Start Golf?

What can golf clubs do to attract new female participants? Specifically, what would bring lapsed players back and what would persuade non-golfers to take the next step and turn interest into action?

AFFORDABLE RENTALS

Being able to sample golf without having to commit to a significant initial spend.

SHORTER COURSES

Less time and shorter rounds, including 9-hole and 6-hole options.

FEMALE GROUP LESSONS

Learn to play with other females, taught by female coaches.

CASUAL DRESS

Women don't want to have to dress-up to relax.

GYM AT CLUB

Adding value to membership and offering all weather options.

CRÈCHE

Enabling young mothers to participate in coaching / play.

MORE AFFORDABLE CLUB MEMBERSHIP / GREEN FEES

Making it easier and less expensive to start golf.

BEGINNER ONLY TIME SLOTS

Making new golfers feel comfortable and less intimidated.

FAST TRACK LEARNING ON BASIC RULES AND SKILLS

Making new golfers feel comfortable and less intimidated.

SUMMER ONLY MEMBERSHIPS

Better value for a sport that is perceived as a fair weather activity.

FLOODLIT COURSES

Allowing golf in the evenings after work / when childcare is available.

MORE AND BETTER TV COVERAGE

Seeing more women's golf on TV would inspire take-up of the sport.

ROLE MODELS ON TV

We asked our panellists about golf on TV. While some had seen The Ryder Cup and Open Championship, few had seen women's golf on TV. While lapsed and non-golfers could name Tiger Woods and Rory McIlroy, no female professionals could be identified. While the golfers were able to name Laura Davies and Paula Creamer, only one female golfer recognised Charley Hull.



How Would Golfers Grow the Game?

Finally, we asked the female golfers in our focus groups what they thought would help grow the game. Here are the ideas they suggested:

GOLF IN SCHOOLS

While respondents in Edinburgh praised the schools' golf programme in Scotland (ClubGolf), our Manchester and Wimbledon groups were confused as to why golf was not widely available in schools in England.

SHORTER COURSES

Golfers agreed that the flexibility to play shorter rounds, including a 6-hole option, therefore lessening the time commitment, would make golf more appealing.

WOMEN'S BEGINNER SESSIONS

Our panellists thought women would be happier learning with groups of other females, with an emphasis on encouragement rather than discouragement, which they thought was common at clubs.

FRIENDLIER CLUBS

The golfers in our groups recognised the need for golf clubs to be more welcoming, changing the perception of clubs and taking the pressure off new golfers.

FAST-TRACK LEARNING

The concept of five beginner sessions that got women into golf quickly was a good idea, rather than an apparently endless commitment to lessons on the range.

AREA FOR CHILDREN

Creating a designated area for children to play and be overseen would enable mothers to play golf, our groups thought. It would also send out a message that clubs are female and family friendly.

SHORT-FORMAT PROFESSIONAL EVENTS

The golfers in our groups agreed that more appealing TV formats might make golf more interesting and inspire new players; a female equivalent of 20/20 crickets, potentially played over 9 holes.

TOPGOLF

Our panellists discussed a range of alternative golf formats, with Topgolf – combining a social and friendly-competitive driving range experience – being the favourite solution.

WHY TOPGOLF APPEALS

- Overcomes perceived barriers to conventional golf
- Fun, casual
- More social than just a driving range
- Competitive
- Develops skills
- Highly appealing to lapsed players and non-golfers
- BUT is perceived to be expensive

Summary

By looking deeper into the issues surrounding female participation, it's clear that golf has a positive opportunity to grow the game by attracting more women golfers.

The results of both our qualitative and quantitative surveys indicate women take part in sport primarily for stress relief, exercise and time outdoors. And while, at first glance, they may not feel golf can offer them the calorie-burning experience some sports do, clubs and the sport can overcome this by proactively communicating the health benefits of golf. Golf does offer women the opportunity to spend time outdoors, as well as time with friends and family, two important factors that strongly appeal to women.

Golf can also learn from the finding that women take up sport by observing others participating i.e. seeing friends or family taking part, or when they drive past a swimming pool or see a sports facility close to where they live. The opportunity for golf is to promote itself and reach out so that people know what goes on at a course or club. Some clubs – especially proprietary venues – successfully do this by advertising their facilities with banners on the road outside the venue.

Many non-golfers have no idea that golf courses have restaurants and bars that are open to the public for coffee and lunches. There is also a widely held perception that you have to commit to a 12-month membership to play golf and that, combined with 'expensive' golf equipment, the investment can be prohibitively expensive. Non-golfers are often unaware of starter schemes, flexible pay-and-play options and affordable golf equipment.

By listening to what existing female golfers and prospective players are saying, there is an opportunity for golf and golf courses to take a customer-focused approach that can successfully appeal to and engage women in golf. Communication and outreach to local markets, as well as the proactive support of existing female club golfers, are also important factors for courses to consider.

Anecdotal evidence from clubs and courses that follow this type of approach in their business suggests that increased female participation can be achieved, bringing new customers into golf. However, clubs do need to be mindful of the perception of intimidation and lack of friendliness, and provide a consistently warm welcome, an ongoing culture of customer service and schemes and amenities that engage women in golf on a sustainable basis.

Over the next few months, Syngenta plans to showcase a number of these courses in mini-documentary videos available to view on www.greencast.co.uk

Thank you for reading this report. Syngenta is committed to investing in market research to assist golf clubs, courses and ranges in their decision-making and benefit the long-term business sustainability of golf.

If you have any comments or questions, please contact us by writing to rod.burke@syngenta.com or golf.syngenta@syngenta.com

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