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MEMBERSHIP RECRUITMENT & RETENTION:
KEY THEMES FOR IMPLEMENTATION

PREPARED FOR ENGLAND GOLF



CONTENTS

1.	Background	3
2.	Research Objectives	4
3.	Research Specifics	4
4.	Research Outcomes	6
5.	Specific Examples	11
6.	Conclusions & Recommendations	13
7.	Contact Details	15

1. BACKGROUND

England Golf has ambitious plans over the next seven years to grow the game of golf in England and to inspire "people of all ages to make golf a part of their life". The organisation has four key aims to be achieved in the medium term.

- Reversing the trend of declining club membership and working towards a target figure of 750,000 members of golf clubs in England by 2020
- 910,000 people playing golf once a week by 2017
- Strengthening our talent pathway at every level, leading to international success for English players
- Improving the effectiveness of planning at club, county and national level, improving communications and governance and strengthening partnerships

In order to achieve these aims, England Golf is looking to increase the number of players from all backgrounds and of all abilities who play golf regularly.

The achievement of these objectives will require a switch from the position in recent years which has seen fewer people playing golf and those who continue to play tending to play less frequently.

A minority of clubs have bucked this trend, however, and have had considerable success in encouraging new members and players and in minimising the extent to which people turn away from the game.

England Golf has commissioned SPORTS MARKETING SURVEYS INC. to conduct a number of in-depth semi-structured qualitative telephone interviews with a sample of key personnel from these clubs in order to understand to what they attribute their success and what steps they have taken which have (and potentially have not) been helpful in seeking to bring this about.

2. RESEARCH OBJECTIVES

The key points addressed in the interviews were as follows:

- The range of membership options and offers available
- Particular growth areas of membership and/or participation
- Pricing structures employed
- Membership retention initiatives
- Marketing initiatives
- Communications with members and visitors
- Dress code and other formalities
- How and why has success been achieved

3. RESEARCH SPECIFICS

Key personnel from 55 clubs were interviewed by SPORTS MARKETING SURVEYS INC. personnel. All had indicated that 2012 had seen an increase in membership levels from 2011 and each confirmed that 2013 has at least seen membership numbers hold firm. In many cases it has increased again.

The great majority of interviewees were from Private Members or Proprietary clubs, though there is some Pay & Play/Municipal representation among those to whom we spoke.

Interviews were conducted in late September and early to mid-October 2013.

It is worth recording that, without making light of the achievement of these clubs in respect of membership development and retention, increases at most of these clubs were relatively modest. This can clearly be seen in the table below which shows responses from the 20 clubs who took part in a preliminary on-line survey. (These are, of course net figures, i.e. the extent to which the number of members gained exceeds the number of members lost.)

Category	Average increase per club	% of total gain
Adult males	+15	71%
Adult females	+2	10%
Junior males	+3	14%
Junior females	+1	5%
TOTAL	+21	
7-day member	+5	24%
5-day member	+5	24%
Corporate	+2	10%
Flexible	+6	29%
Other	+3	14%
TOTAL	+21	

The purpose of the preliminary survey was to identify high performing clubs for further research and to gather basic data about their performance. Of the 20 clubs who responded reporting an increase in membership, 19 were identified by name – 17 of these were private clubs, two were proprietary.

It is also worth noting that the clubs that have performed well in terms of retention and/or development of membership are largely at the 'high end' of GB&I golf courses, in terms of name, reputation and quality of course and in terms of affluence of catchment area – clubs, in other words, that are less vulnerable than most to their memberships being hit by the difficult economic circumstances of recent years.

All 20 keep a database of members, whilst 17 of the 20 keep a database of visitors.

A number have made use of outside help to promote their club amongst members or visitors.

Source of help	No.	%
England Golf GolfMark	7	35%
England Golf Club Services	3	15%
England Golf County Golf Partnerships	6	30%
England Golf CDO's	4	20%
Any other external agencies	6	30%
None	8	40%

Several clubs have made use of more than one form of assistance in this regard from England Golf. In total, 10 of the 20 have sought help from one or more of the England Golf programmes and the other 10 have not.

4. RESEARCH OUTCOMES

There are two words which come up time and time again in the interviews we conducted with key individuals at golf clubs who have bucked the trend in membership numbers and retention.

- Flexibility
- Friendliness

Each is worth looking at in some detail.

Flexibility

A common theme from many of the interviews is that clubs have had to recognise that life outside the golf club has changed in a number of ways in recent years and golf clubs need to be conscious of this in the variety of packages that they offer to their members.

The teenage golfer

Many point out that the age at which people move from junior to adult membership (18 in most cases) coincides with the point when they take far greater responsibility for their own financial management, with a consequent reduction in parental contributions. This is not, our interviewees pointed out, a good time to ask them to pay a markedly higher rate for golf club membership than was previously being paid on their behalf by their parents. A greatly reduced fee for those being asked to make this transition is, therefore, being offered by many of the clubs we researched.

Some spoke also of being conscious that many 18 year olds are taking up university places, potentially leaving the area, but returning during holidays to the parental home. A number of clubs have developed packages aimed at keeping these young people in membership which allow them to play when they are back in the area, but not at a rate which, though perhaps reasonable for use throughout a 12 month period, would seem prohibitive for the weeks in a year when they are at home.

The younger golfer

Many clubs are offering lower rates for the younger member up to a later age than was previously the case. Some are doing this to age 40. This reflects the societal change which has seen more people than was the case in the past establishing home with a life partner, taking on a mortgage and starting a family in their 30's rather than 20's.

The point here is that many people in their 30's have so many other draws on their time and their finances that the frequent golf they once played (and may well play again in the future) is no longer viable for them. Clubs see the value, however, in flexible membership offerings to them which will encourage them to play occasionally, help to maintain their interest in, and aptitude for, playing golf and retain loyalty to their club. All of these, it is believed, are helpful contributors to ensuring that later on in life when they have more time available and fewer demands on their financial resource, they will happily take up full adult membership of the club.

The older golfer

Flexibility towards older, often long standing members of the club, is also being offered by many. Usually retired, these people are prime candidates to play during the week and often not to play at the weekends.

Some interviewees also reported steps that they take in recognition of the fact that senior members may often not wish to play in cold and wintry weather. Seasonal memberships and memberships based on number of rounds per year were among the reported steps being taken to address this issue.

The occasional golfer

The occasional golfer is well represented in each of the categories we have described thus far. They are well represented beyond these groups also. There is a recognition among many of the club secretaries and managers to whom we spoke that the member for whom it is only practical occasionally to play a round of golf or who chooses only to play occasionally is a member worth having, and that flexibility in pricing needs to be available to them in order to ensure that they do not allow membership to lapse.

The novice golfer

There has long been an issue for the game of golf in that it is seen as a sport that is difficult for a person to try out, to 'have a go' to assess whether (s)he has an aptitude for it and would enjoy it without incurring significant expenditure on equipment. As we know, there is often some truth in this perception.

A lot of the people we spoke to have introduced initiatives which are aimed at providing people with the opportunity to try the game without incurring significant expense. They are doing this in the expectation that some of the people who have a go at the game will enjoy it and decide to take it up and, therefore, that the investment on the part of the club in staging introductions to the game will ultimately pay dividends.

There are a range of schemes being deployed here. These include:

- days when non-golfers are invited to come along at little or no cost to receive introductory tuition and to see the facilities;
- days when members are encouraged to bring non-golfing friends along to receive an introduction to the game;
- low cost, short term membership schemes for a few weeks or months. Many of these offer tuition from the club professional(s) as part of the package and a phased introduction to the course, having first honed their skills on the driving range and practice greens.

Many of these initiatives link very strongly in to the second key factor which regularly came to the fore in the explanations that many of our interviewees gave as to why they have enjoyed impressive results in membership building and retention - 'friendliness'.

Friendliness

Very many interviewees identified this as a point of difference between themselves and their nearby competitors. We need to exercise a degree of caution here as it is unlikely that the competitors would themselves agree with this distinction. Nonetheless, there are some concrete steps that clubs are taking to demonstrate this friendliness that are worth noting because they are relevant when looking at membership development.

- Bar and restaurant staff are encouraged not only to be polite and helpful to customers, but to engage them in conversation, identify newcomers and introduce them to members who are around at the time.
- The club captain and committee members are consciously seeking to welcome new members and to introduce them to other members.
- 'Have a Go at Golf' days often involve a number of existing members who are willing to help with the tuition of those giving the game a try and also to show them the facilities of the club and to make introductions to other people. Indeed, some 'Have a Go at Golf' days are specifically put together for members to bring non-golfing friends along.

A general relaxing of some rules and regulations which may fit less well with modern society than they would have done in the past - no jeans, no trainers, no mobile phones etc. was pretty commonplace among the clubs we surveyed. Many, as we have seen, are focused on attracting the younger rather than older golfer and reduced formality is generally seen as helpful here. It is important to state, however, that a number drew our attention to the fact that a degree of formality is appreciated by many and they see themselves as having slightly relaxed their requirements to reflect modern society rather

than abandoning all requirements which many link to good behaviour and creating a convivial environment. Those who have more than one bar and more than one restaurant have often chosen to relax the rules in some, whilst maintaining them in others.

It is worth noting that clubs attached to hotels are particularly likely to have moved away from traditional rules at least in some bars and eating areas as guests have often proved to be quite unhappy at, for example, being told that they cannot wear jeans in the bar of a hotel where they have booked and paid for a week's accommodation.

Use of Club Facilities by Non-Golfers

Most, if not all, of the clubs we sampled make the clubs facilities available commercially for weddings, conferences, away days etc. Additionally, whilst hotels attached to golf courses heavily promote the golfing possibilities related to staying there, they are also more than happy to promote the 'nice hotel in a nice setting' concept to those who wish to stay without any intention to swing a club.

Some of our interviewees, however, spoke of being conscious of the opportunity to attract the non-golfer who is at the club for another purpose to consider coming back to give golf a try at some point. This is partly achieved by simply aiming to offer a first rate experience throughout the duration of the time that someone spends at a club. The wedding guest, for example, should find the environment pleasant, the food of a high standard and the service both efficient and friendly. Increasingly, however, clubs are ensuring that literature about the club and its 'Have a Go at Golf' initiatives is available to these people in case of interest.

Marketing Initiatives

Many, though by no means all, of the clubs we engaged with are seeking to build up databases of non-members who have visited the clubs for whatever purpose in order to seek to attract them back, with giving the game of golf a go being very much among the options open to them.

Electronic communication is being widely used for this purpose in addition to the traditional mailshots. A number are turning to modern media to communicate with the membership. This, as many point out, is most effective when seeking to communicate with younger people, something which ties in nicely with the priority which many clubs are attaching to attempting to attract more young adults to the game and to deter fewer from giving up their membership.

In terms of other marketing, there has been some use of local press and, to a lesser extent, local radio. Time and again we were told, however, that 'word of mouth is best', i.e. the strongest encouragement to come along is hearing from friends that they play golf there and enjoy all aspects of the club - course, bar and restaurant, opportunity to make friends etc.

The Potential to Increase Membership Amongst Women

One England Golf priority that is not receiving the attention and/or achieving the results the organisation would like is the potential to increase interest in golf and golf club membership amongst women. This is primarily because the great majority of people to whom we spoke do not feel that the best opportunities to increase membership exist among women. They understand, of course, that by sheer weight of numbers, women offer the greatest potential if they could be attracted to the game. They tell us, however, that:

- More flexible membership and non-member playing opportunities for young (in this context up to age 40) adults have achieved greater results and represent a better option for them moving forward. These people are often people who have played and enjoy golf who need to be accommodated in the years when time and budgets restrict the degree to which they can play, but who still want to play sometimes and who are likely to play more frequently again in the years ahead. Keeping these people on board, it is felt, offers a far easier opportunity to retain members and associated revenue than to seek to sell the game to women who don't play.
- Many interviewees told us that their courses are not 'women friendly'. Primarily, this reflects the length of the course and the degree of difficulty. There is a strong feeling among our interviewees that the quality of the course is a key strength of their offer and reason why they have performed well in membership terms. Quality in part, of course, reflects the beauty of the landscape. It also, interviewees clearly feel, reflects the challenge that the course offers. Be they right or be they wrong, it is the clear perception of many that the course would need significant re-design to increase its appeal to women and that this would not only be hugely expensive, it would also be counter-productive in reducing the challenge for those to whom the challenge is a key strength of the club's offering.
- We were also often told that attempts to attract women to 'Have a Go at Golf' days had not achieved good results in the past, even when encouraging members to bring along a friend, and that membership take-up levels among the women who have come along has not been as high as among male attendees.

5. SPECIFIC EXAMPLES

Research confidentiality obviously prevents us from naming specific clubs and specific initiatives. The details below are of the measures taken by one club that, in combination, is more than most are doing, but in each measure taken is typical of commonly taken steps by the clubs whose managers and secretaries we spoke to.

"Flexible membership is the main thing. A few years ago we had four categories of membership now we have:

- Platinum Membership – seven days
- Gold Plus Membership – six and a half days (not Saturday morning)
- Gold Membership – 5 days
- Reduced Rate Membership for 26–29 year olds
- Intermediate Plus Membership for 21–25 year olds
- Intermediate Membership for 18–20 year olds
- Silver green fees – initial cost then £25 per play
- Bronze green fees – initial cost then £50 per play

We waive joining fees for lump sum payments and offer incentives to renew promptly such as 2 for 1 meal deals in the clubhouse.

We try to attract new people by offering some free lessons. We have a 'Gateway to Golf' package. This involves five lessons with a Pro, five rounds on a nine hole course and 100 balls for £100. We are pleased with what this has achieved for us in terms of tempting people ultimately into full membership.

I write an article every week for the local free press on what has been happening at the club. We produce a regular newsletter for members and, above all, we want to create a friendly atmosphere that loses the old fashioned stuffiness of the golf club. Jeans and trainers are fine in the clubhouse here."

Similar initiatives, and motivations lying behind initiatives, were reported by other interviewees.

"Student members were falling off the face of the earth, so we decided to create an inexpensive membership category to retain their association with the club."

"We do a PR exercise to keep our brand and image in the local news. We want them to feature our competitions and events."

"The best marketing we can do is to invest in our club, in our courses and in our facilities."

"We have lowered the cost for young adults to try and attract more people in their 20's."

"We have a more relaxed dress code in our bar area. That has been popular with the younger element."

"We don't market to green fees payers. The weather is always going to be the key driver of how many of those people turn up. I've learnt not to waste money on trying to persuade people to play in the rain. If the sun shines here, people will come. If it rains, a red carpet and free food wouldn't bring them in."

"We're not an airs and graces golf club. It doesn't suit the course or the area or the ethos. Some of the older members tell me we've gone to the dogs though!!"

"Our flexible memberships are convenient for people, easy on the pocket and helpful if cashflow is tight."

"Twitter and Facebook have worked well, but to be honest, word of mouth is still the most powerful thing."

"Until we were more flexible in our membership offers, we only had seven members between 30 and 40. This is the age when people are taking on mortgages, having children etc. If we didn't offer flexibility, we wouldn't have grown (membership) among these people."

"We are a friendly and welcoming club. Anyone who walks through the door will find a membership option that suits them and their pocket"

6. CONCLUSIONS & RECOMMENDATIONS

It is clear that there are a number of English golf clubs that are bucking the trend in enjoying success in growing membership and achieving pleasing retention rates. It is clear also that this is not a happy accident, it is the result of steps they have deliberately taken to achieve this.

- Flexibility in membership offerings has been key to success. Essentially clubs have recognised that one package no longer fits all and that the member who plays occasionally is still a member worth having. They also recognise that the member who is keen to play, but cannot make the financial commitment they might have made in the past and may make again in the future, is still worth holding on to even if this needs to be achieved by asking for a more modest financial contribution from them than would previously have been the case. Accommodating these people achieves some revenue that would otherwise be lost. It also serves to retain an interest in and aptitude for golf and, crucially, feelings of goodwill and loyalty towards the club which, it is expected, the club will feel the full benefits of in later years when the golfer has more time at their disposal and is more comfortable in meeting a greater financial requirement.
- This strategy is primarily aimed at the younger (up to 40) golfer and it is clear that, both in terms of membership retention and seeking to attract new people to the game and ultimately to membership, it is among the under 40's where the major effort is taking place.
- In seeking to retain memberships of people who played when younger, but are facing the demands on their pockets and on their diary that people face in their 20's and 30's, the focus is primarily on male golfers because it is primarily male golfers who played when younger. If England Golf wishes to push strongly for more efforts to attract women to the game, the starting point needs to be persuading the clubs that this is a fruitful area for them to look to. The resistance is not based in sexism, it is based in what the club administrators consider to be practicalities – ask a largely male membership to encourage their friends to come to 'Have a Go at Golf' days and it will be largely men that come along, bring potential new members into a heavily male environment and it will feel more comfortable to men etc. A strong argument which will be encountered in resistance is that people like the course because it is difficult. Changing it to make it more women friendly, people will argue, would be expensive and counter-productive as the effect would be to reduce the degree of difficulty which, to many, is the key strength.

- The constant references in the interviews to 'friendliness' as a point of difference are worth noting. When examined more closely, what this means is that staff and existing members are being actively encouraged to welcome new members and to make social introductions. Many of these clubs are involving members in 'Have a Go at Golf' days including those not specifically aimed at members' friends primarily to encourage interaction which will make the club seem welcoming and, to use the key word for many, 'friendly'. Greater encouragement of this way of thinking could also have the potential to achieve great things in recruitment we believe.

In summary, success is being achieved without taking any hugely radical steps, though this is not to say that radical steps aren't necessary and won't pay dividends in the future. The three key principles which our interviewees have applied, however, could easily be deployed across the country and could potentially reap rich rewards without profoundly changing the way the clubs operate.

- Every member is important and finding ways of accommodating each person's requirements, lifestyle and pocket is key to achieving high retention levels.
- Finding ways of helping people to give golf a try without huge initial expense will pay dividends because they don't necessarily know what we know – that golf is fun, most people can play well enough to enjoy it and the social side related to it can be hugely enjoyable.
- The feeling that the club offers a friendly, convivial environment where it would be easy to socialise and find people to have a round of golf with, is hugely important in determining the extent to which people will take the plunge and try membership.



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