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Mindset | Jon Last

Golf consumers: coming out of the rough?

I have always considered myself to be a ‘half-full’ kind of guy, but even the most optimistic in the golf industry look back at 2009 as a particularly challenging year. US participation remained flat to marginally down, while many facility operators and OEMs suffered hits to yield optimization and profitability.

Our Sports and Leisure Research Omnibus study, completed in January 2010, provides a fresh and current look at the golfer’s mindset as the new season approaches, and there are glimmers of optimism to encourage us. However, concurrent with this welcome emergence from the depths of 2009, our assessment also suggests that some fundamental belief systems have changed.

Perhaps most encouraging is a renewed vigor among golfers to tee it up with greater frequency in 2010. In January of 2009, 77 per cent

indicated that they expected to play as many rounds of golf as they did in the previous year, or more. Asked a backward looking question this January, a statistically similar 72 per cent reported that they actually did play the number of rounds they had predicted. So, with this precedent, it is refreshing to see that in our most recent study, 94 per cent of golfers said that they expect to maintain or increase their play in the year ahead. I wouldn’t necessarily take this to the bank and project a significant increase in rounds played, but our study does suggest that intent and commitment to play more golf has snapped back from where we were a year ago.

Similarly, in an era when value has become an important calling card, our latest study pleasantly reveals generally higher price expectations among golfers for new equipment

across all categories with the exception of putters and golf balls, which remain flat with 2009 price expectations. At the same time, two thirds of the more than 1,000 golfers we interviewed expect to spend as much or more on golf-related purchases in the year ahead.

We also see a rebound in golfer sentiment across a number of attitudinal dynamics. After hitting lows in Summer 2009, most recent results show golfer bullishness in areas such as willingness to indulge. More significantly, more than half agree that the year ahead will be better than the previous year. Only a third of golfers expressed similar sentiments last summer.

However, there are still a number of alarming trends that may impede our opportunities in 2010. Time constraints remain a significant challenge for golfers, even more





Image: Courtesy of Landmark Media

Golf facilities that accommodate a rising demand for family time may be more successful

Two-thirds of golfers expect to spend as much as—or more than—they did last year on golf-related purchases

than the financial costs of playing the game. Our research continues to reveal a stressed, multi-tasking consumer facing increasing demands from work and family that do not always coincide with golf. In our most recent study, only a third agreed that they were spending more time these days with friends and family than they did in the past. In lock step with this phenomenon, 60 per cent strongly expressed that they'd rather spend time with friends and family than with business associates. The clear implications are that those golf facilities that place a premium on making golf time equate to family time may see greater success than those that are less inviting.

This 'cocooning' phenomenon makes perfect sense, when one examines a heightened child centricity evidenced among golfers in our most recent research. Looking

at the generation of Americans born between 1960 and 1970, one can see that this cohort is now in the life stage that typically saw decisions made about joining private clubs. Attitudinally, these 'Sandwich Generation' adults are literally caught between Baby Boomer and Gen X values. These folks may want to make a greater investment in golf, but they are faced with (often conflicting) decisions about protective parenting and saving for their children's college education.

Simultaneously 63 per cent strongly agree that "there is really no such thing as job security anymore". There is evidence of a tentativeness that now forces choices between investing in golf lessons and the kids' education. Golfers may want to get out of the rough, but this 'new normal' may ultimately slow down their march back into the fairway. ●



Jon Last

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