



nielsen

CLUB MEMBER EXPERIENCE SURVEY



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- The Club Member Experience Survey was developed to understand the experience of players in the club environment and for the golf sector to develop a deeper understanding of the modern golfer – attitudes, behaviours, expectations.
- These insights are intended to help more golf clubs create positive experiences across all interactions within the club, reflect on how they are performing or to re-think the offerings and services they provide to retain and attract more members.
- The design of the questionnaire was led by Nielsen, Sport New Zealand and New Zealand Golf. Whilst the results capture a small number of responses from casual golfers (non-members), the research was focused on golf club members.
- Club membership is integral to the golf sector with over 105,000 New Zealanders choosing to belong as members of golf clubs – the largest adult club-based sport in New Zealand.
- We investigate
 - How satisfied club members are
 - How likely club members are likely to recommend their club and re-join next year
 - What factors to focus on to drive a positive experience for your golf club
 - What needs to improve to retain and attract more players
 - How the club experience varies across demographics, gender, playing experience, ethnicity and club tenure – and how clubs can ensure everyone is catered for
 - And more...

A number of workshops will be held across New Zealand and a full report of the Club Member Experience Survey will be made available on www.nzgolf.org.nz

*Statistically significant differences are highlighted or commented on in this report. Statistically significant differences in this report are significant at the 95% confidence level. That is, we are 95% confident results are not just normal expected variances that result from talking to a different sample within the same population.

The phrase 'cf' refers to 'compared to'.

OVERALL HOW ARE GOLF CLUBS PERFORMING?

OVERALL SATISFACTION



70% ARE SATISFIED WITH THEIR CLUB

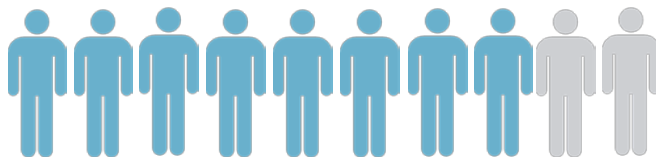
NET PROMOTER SCORE

(Willingness to recommend golf club to friends and family)



NET PROMOTER SCORE OF 55

VALUE FOR MONEY



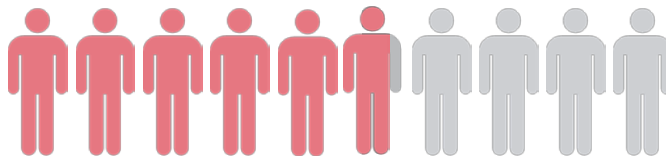
80% AGREE MEMBERSHIP IS WELL WORTH THE MONEY

LIKELIHOOD TO REJOIN



88% ARE LIKELY TO REJOIN THEIR CURRENT CLUB NEXT SEASON

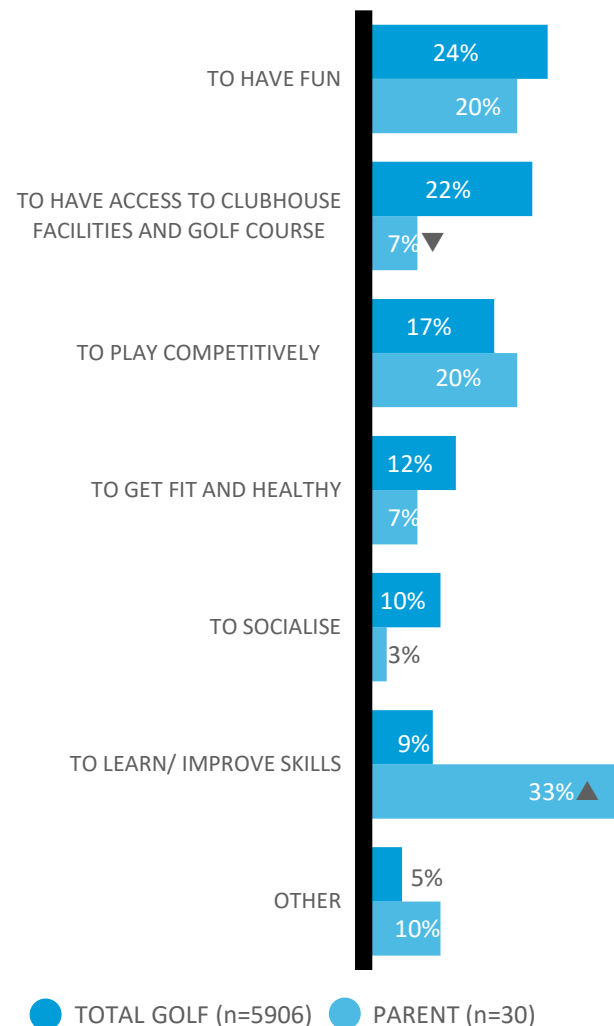
JOINING PROCESS



58% ARE SATISFIED WITH THE JOINING PROCESS

MEMBERS BELONG TO A GOLF CLUB TO HAVE FUN

One quarter (24%) indicated the main reason to belong to a golf club is to *have fun*, followed by belonging to *have access to clubhouse facilities and golf course* (22%) (although parents of players are *significantly less* likely to indicate this as the main reason (7% cf. 22% players)) and to *play competitively* (17%). The main reason parents indicated their children belong to a golf club is to *learn/improve skills* (33% cf. 9% of players).



OTHER REASONS TO BELONG TO A CLUB INCLUDE:

To play a sport I love, even though I am not really competitive.
(Play once a week or more, 60-64 years, Auckland)

To keep a handicap and get affiliated rate green fees.
(Play once a month, 50-54 years, Wellington-Wairarapa)



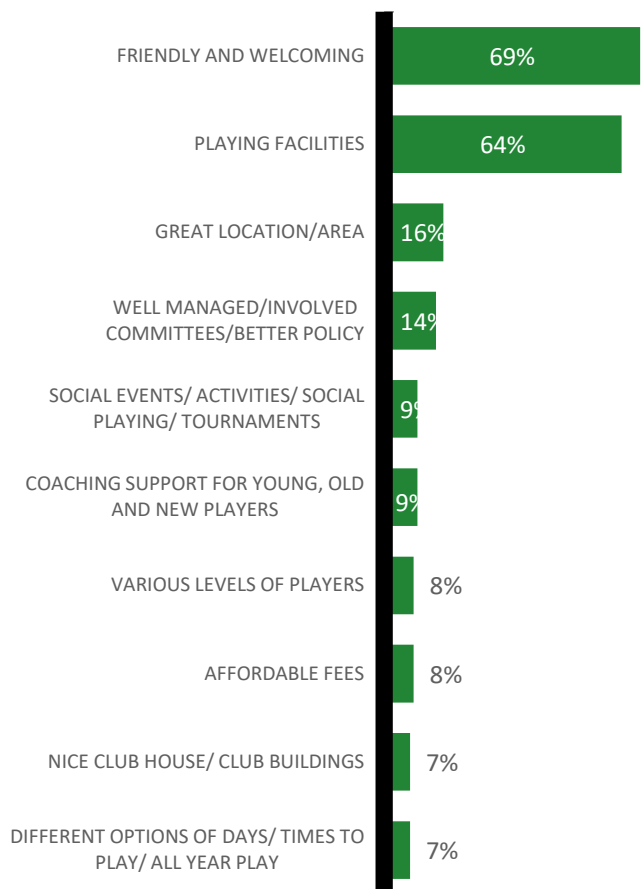
There is a great club atmosphere there.
(Play every couple of weeks, 45-49 years, Otago)

To be able to play when it suits me. As a green fee player in winter it can be hard to get a game at a time of your choice.
(Play once a week or more, 55-59 years, Wellington-Wairarapa)

All of the above.
(Play once a week or more, 20-25 years, Bay of Plenty)

WHAT MEMBERS LOVE ABOUT THEIR CLUB

Of the club members who are likely to recommend their club (9 or 10, with 10 being extremely likely), seven in ten (69%) commented that they love their club because it is *friendly and welcoming*, while two thirds (64%) love the *playing facilities*. Comments across ages and regions reinforce these sentiments.



Suitable for all levels of ability, friendly, not too expensive, near the city centre, fairly easy course layout, fairly relaxed atmosphere, not overly concerned about dress standard, keen to have more people playing the game.
(Play every couple of weeks, 60-64 years, Auckland)

Friendly and helpful staff and members willing to help young players getting started.
(Parent of player aged 8-10 years who plays once a week or more, Manawatu-Wanganui)

Easy to access, fees are set at an acceptable level, interesting course without being too difficult Provides full affiliation Pleasant relaxed environment.
(Play at least once a week, 65-69 years, Auckland)

Good practice facilities and a good challenging golf course. Above all else, what I love most about the club, is how friendly and approachable everyone there is. Can't see myself playing anywhere else.
(Play once a week or more, 40-44 years, Canterbury)

Very social. Club is active in wanting to expand their member base and revitalise the club. Also very competitive prices.
(Play once a month, 30-34 years, Manawatu-Whanganui)

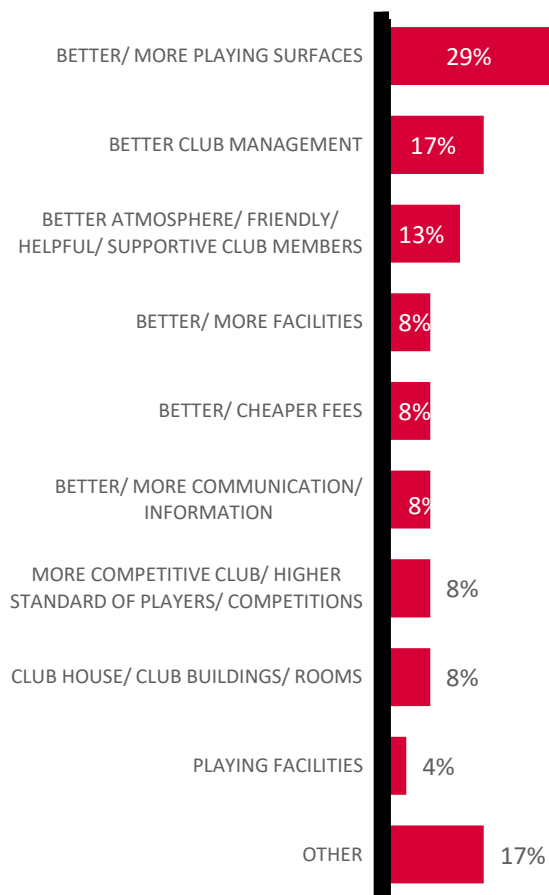
Have always maintained friendly staff over the years. Have a very good re-investment programme in place as many improvements have been made to the course over recent years. Weekly newsletters.
(Play once every couple of months, 45-49 years, Otago)

It's a great environment. The fees are reasonable and the course is in great condition. Club members are friendly and welcoming.
(Play once a week or more, 60-64 years, Auckland)



WHAT MEMBERS SAY NEEDS TO IMPROVE

Almost a third (29%) commented that *better/ more playing surfaces* would need to improve in order to increase the likelihood of recommending their club. One in six (17%) commented on *better club management*, while 13% commented on having a *better atmosphere/ friendly/ helpful/ supportive club members* would need to improve to improve their rating.



Make new, and particularly younger members, feel more welcome. It still very much feels like an old mans club, with younger members made to feel like they're in the way.

(Play every couple of weeks, 30-34 years, Auckland)

Improve general course condition, terrible bunkers, fairways and tee blocks are only in average condition, weeds around the course. Old fashioned clubhouse even though it was updated only a few years ago.

(Play every couple of weeks, 60-64 years, Auckland)

To be more consistent with the presentation of the greens. Also, for the bar prices to be more reasonable, they are now similar to what I would pay in the CBD, far higher than any other club locally.

(Play every couple of weeks, 45-49 years, Bay of Plenty)

Poor presentation of course, limited practice facilities and management.

(Play every couple of weeks, 45-49 years, Waikato)

Develop/promote an environment that is friendly, amicable and keeps its members up to date with events/course improvements, etc planned for the club.

(Play once a week or more, 55-59 years, Canterbury)



More communication from the Board. Non existent so far in 2017. Don't know where the club is heading as no sign of any future plans for course or financially from the board. Far better under a Management committee.

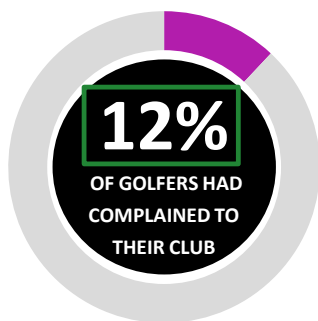
(Play once a week or more, 55-59 years, Canterbury)

Make the course a place where women are made to feel welcome, where their concerns are listened to and action taken where need be and treat women members like they have a right to be there. Stop letting fee playing golfers have preference/priority over women's club/competition day.

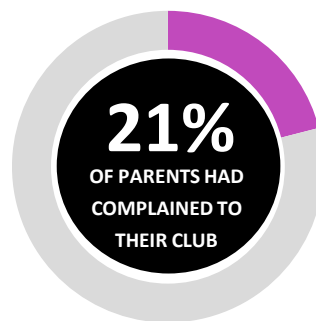
(Play once a week or more, 55-59 years, Taranaki)

IN THE LAST THREE MONTHS...

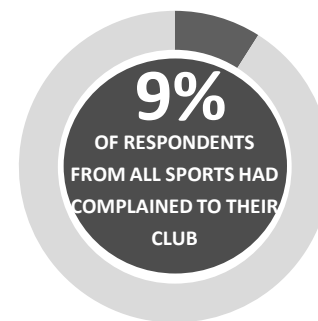
Just over one in ten (12%) had made a complaint to their club in the last three month. This is *significantly higher* compared with the average for all sports in 2016/17.



TOTAL GOLF
(n=5821)



PARENT
(n=29*)



ALL SPORTS
2016/17
(n=24848)

SUB-GROUP DIFFERENCES

Those *significantly more* likely to have made a complaint in the last three months are:

- Those who have been members for more than 10 years (15% cf. 12% total)
- Those who belong to *play competitively* (16%)
- Those who play or train 6 or more times a month (15%) and play once a week or more often at their home club (13%)
- Those who have been a member of another club (13% cf. 9% who have not been)
- Dissatisfied or extremely dissatisfied with the overall experience (32%)
- Unlikely to rejoin next season (28%)
- Those aged 65+ (13%)
- Committee Members (16%), Officials/ referees/ umpires/ judges (20%)
- Those who have played for the top team at their club (20%), represented their club at a regional event/ competition (16%) and/or region at a national event/ competition (22%)
- Full Playing Membership (13%)
- Those from Bay of Plenty (14%) or North Harbour (18%) clubs
- Handicap 1 to 10 (21%).

Those *significantly less* likely to have made a complaint in the last three months are:

- Members for less than 5 years (8%)
- Those who belong to *have fun* (10%) or *I learn/ improve skills* (5%)
- Those who play or train once a month or less (8%) or two or three times a month (8%) and play less than monthly at their home club (4%)
- Very or extremely satisfied with the overall experience (7%)
- Very likely to rejoin their club next season (10%)
- Flexible (4%) or Summer Membership (1%)
- Those from Otago (9%) or Waikato (8%) clubs
- Handicap 31 to 40 (6%) or Null (4%).

* Small base sizes

▲▼ Significantly higher/lower than Total Golf

□/□ Significantly higher/lower than All Sports 2016/17

DRIVERS OF THE CLUB EXPERIENCE

These are the 9 key drivers that are most important to golf club members.



WHAT IS NET PROMOTER SCORE (NPS)?

Net Promoter Score measures the willingness of customers to recommend your golf club to others. It is also used as a proxy for gauging the customer's overall satisfaction and loyalty.



$$\% \text{ PROMOTERS} - \% \text{ DETRACTORS} = \text{NPS (NET PROMOTER SCORE)}$$

- Promoters (score 9-10) are loyal enthusiasts who will keep buying and refer others, fueling growth.
- Passives (score 7-8) are satisfied but unenthusiastic customers who are vulnerable to competitive offerings.
- Detractors (score 0-6) are unhappy customers who can damage your brand and impede growth through negative word-of-mouth.

WHAT IS DRIVING THE NPS RESULTS?

While all the attributes are important, the top three drivers of recommendation of a golf club are:

1. Value for money
2. Being friendly and welcoming
3. Having well maintained course conditions

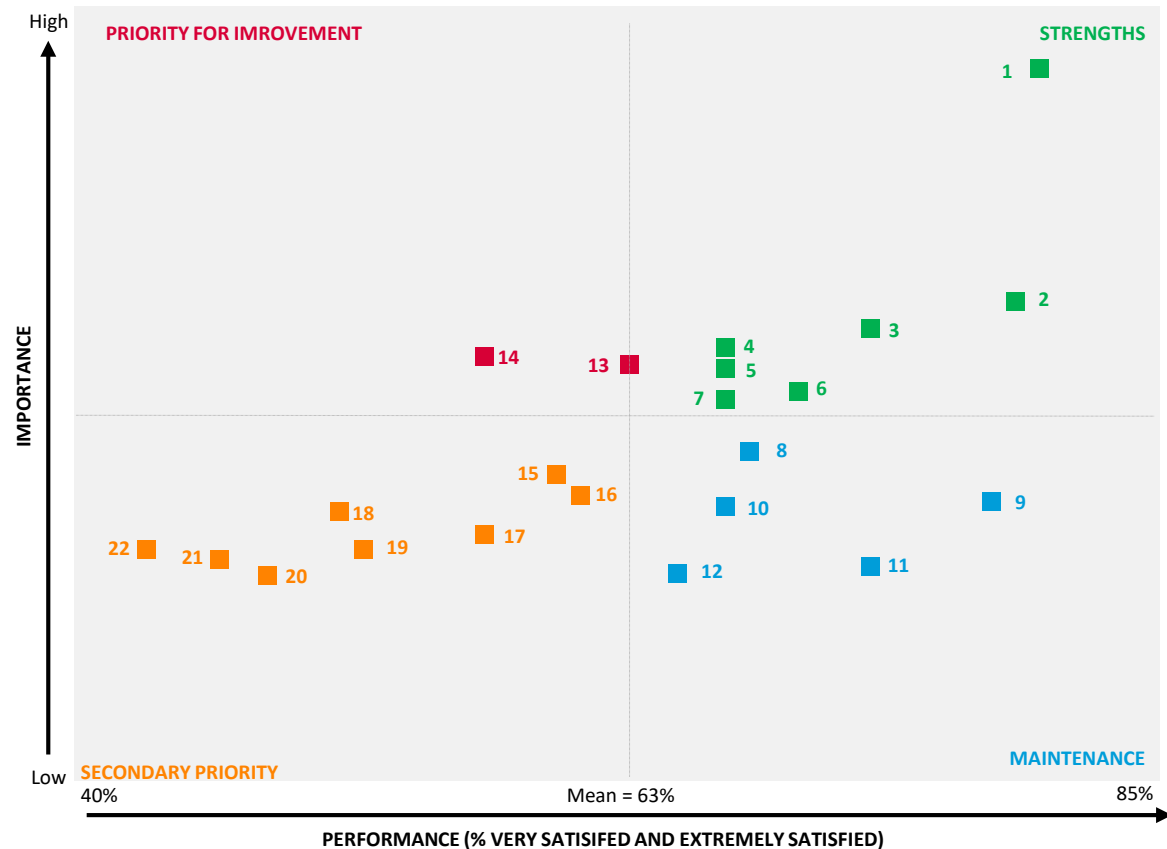
These three factors are among the top four areas of performance (as shown in green, top right quadrant).

Two factors that need to be considered as priority for improvement are *fostering a sense of pride in the club* and *being responsive to my needs and requirements*, (as shown in red, top left quadrant). These areas should be addressed to drive recommendation.

In blue are club member experience factors where performance is high and should be maintained.

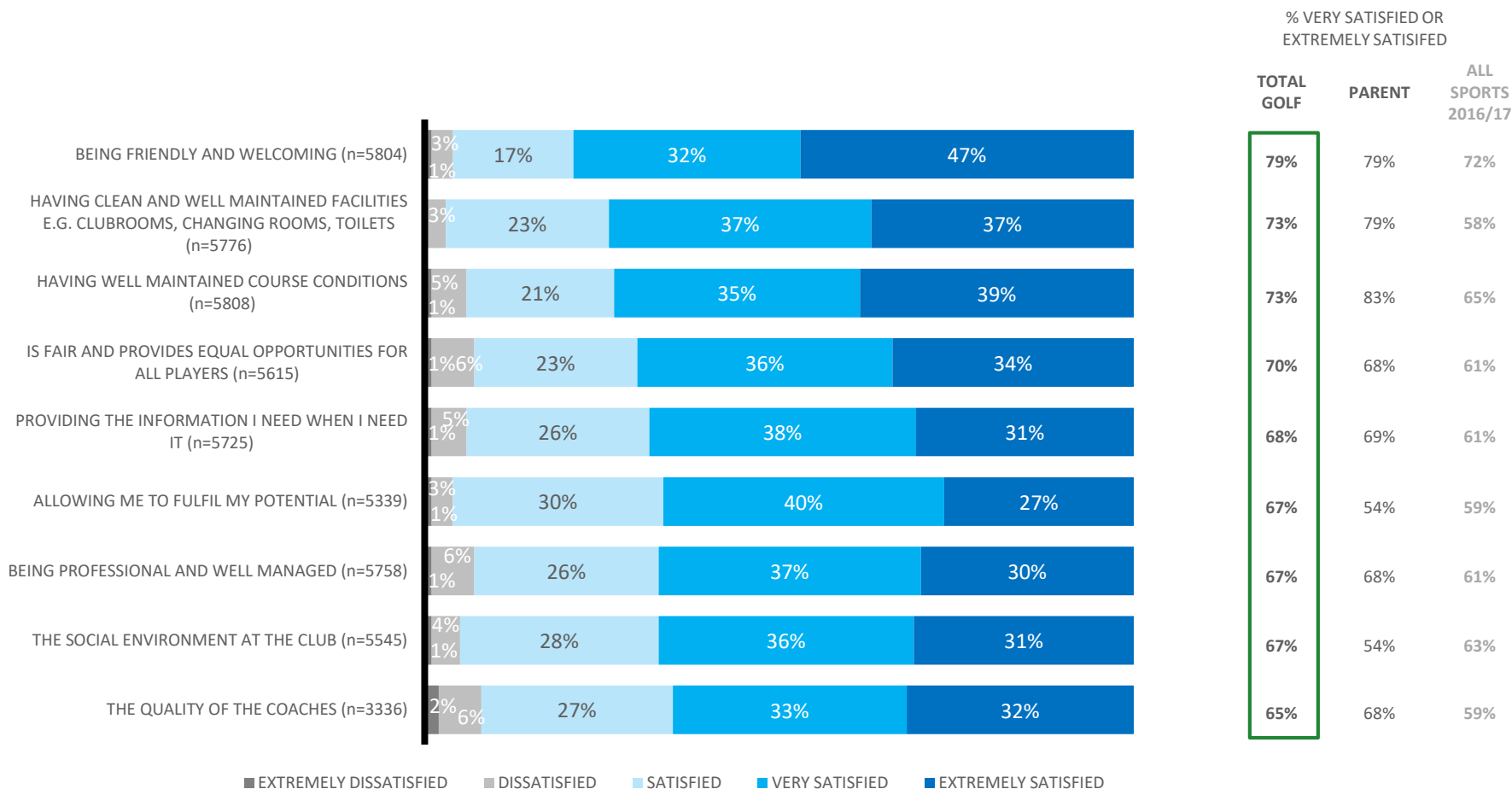
In orange are factors in the secondary priority quadrant, signifying relatively low performance in areas of lower importance.

1. Value for money
2. Being friendly and welcoming
3. Having well maintained course conditions
4. Being professional and well managed
5. Allowing me to fulfil my potential
6. Is fair and provides equal opportunities for all players
7. The social environment at the club
8. Providing the information when needed
9. The ease of booking tee times and accessing the golf course
10. Encouraging good sportsmanship and fair play
11. Having clean and well maintained facilities e.g. clubrooms, changing rooms, toilets
12. The quality of the coaches or instructors
13. Fostering a sense of pride
14. Being responsive to my needs and requirements
15. Quality and variety of club competitions
16. Providing a safe environment for adults and children
17. Time it takes to complete a round of golf
18. Engaging with the local community
19. Quality of food and beverage offered
20. Providing information and opportunities to volunteer as a coach, official or course rater
21. Practice facilities (driving range, putting green, chipping area)
22. Providing information about junior programmes or adult coaching



SATISFACTION ACROSS NINE CORE DRIVERS

When compared to the average across all sports in 2016/17, golf members are *significantly more* likely to be satisfied (very or extremely satisfied) with each of the nine core drivers of satisfaction, with the level of satisfaction (very or extremely satisfied) ranging from two thirds (65%) for *the quality of coaches* to four in five (79%) for *the club being friendly and welcoming*.

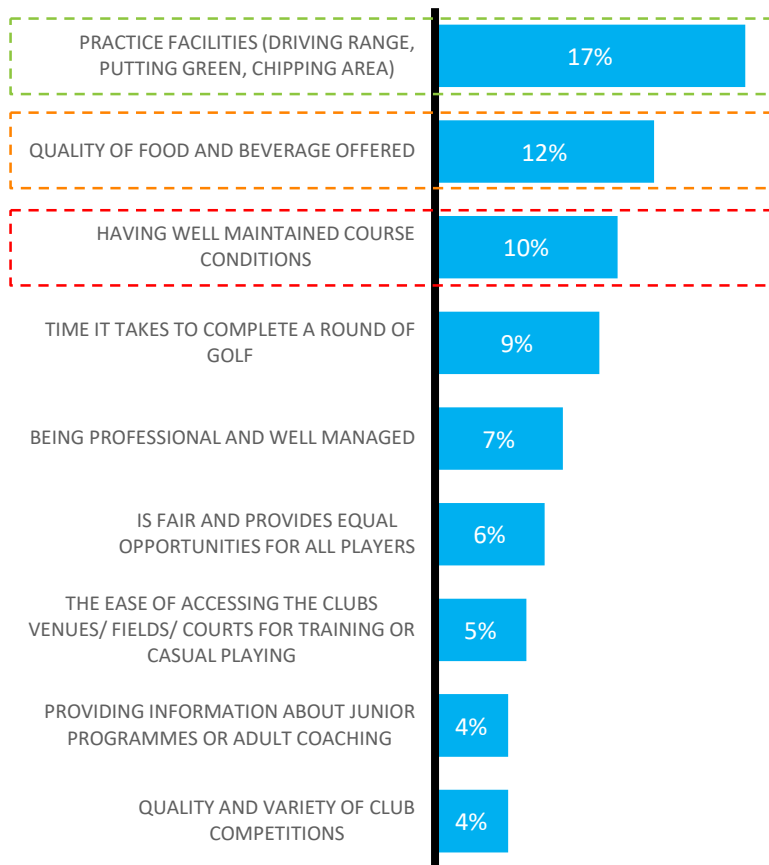


▲▼ Significantly higher/lower than Total Golf

□ Significantly higher/lower than All Sports 2016/17

DISSATISFIED MEMBERS WOULD LIKE THESE IMPROVEMENTS

Members who were dissatisfied (or extremely dissatisfied) were asked to select one aspect they are **least** satisfied with. One in six (17%) indicated they are least satisfied with the *practice facilities (driving range, putting green, chipping area)*, followed by the *quality of food and beverage offered* (12%) and *having well maintained course conditions* (10%) .



WHAT WOULD YOU NEED TO BE MORE SATISFIED...

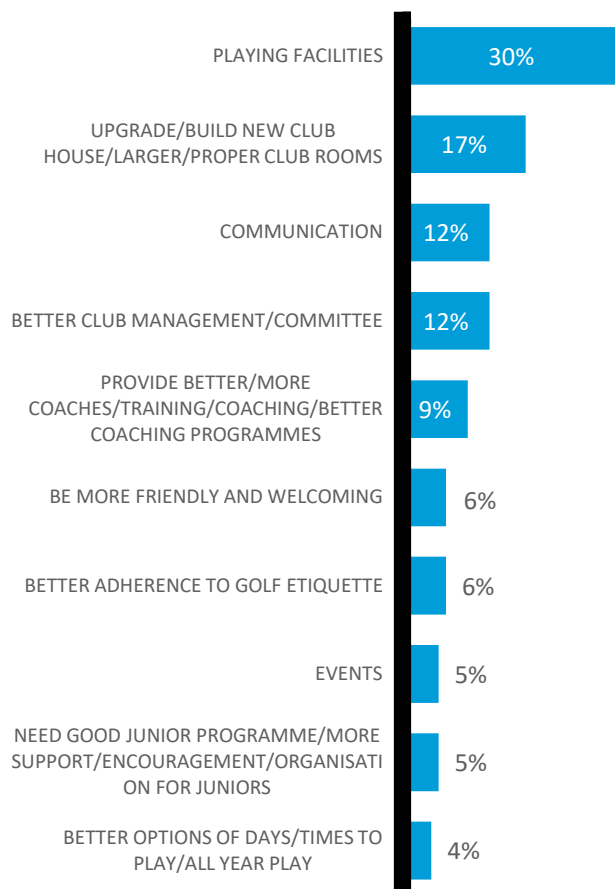
Better range of facilities to help improve your game. Short game area, wedge greens, practice fairway where you can hit driver.
(Play once a week or more, 35-39 years, Otago)

More than just deep fried food. Healthy options and different meals offered on busy club days.
(Play once a month, 30-34 years, Auckland)

More attention paid to the course. Not just cutting the grass. Condition of paths, tees, markers, improvement in tidiness in general. Making the practice green usable for practice.
(Play once a week, 70-74 years, Wellington -Wairarapa)

MORE OF WHAT NEEDS TO IMPROVE FOR LOWER RATED ASPECTS

Of the members who are dissatisfied or extremely dissatisfied, about a third (30%) commented that the playing facilities would need to be improved to be satisfied with their club, while one in six (17%) commented that an upgrade to the club house/clubrooms would need to be improved to increase satisfaction.



Greater range of food choices - especially non-bread options. e.g sushi, frittata, rice or pasta or grain salads. Smaller sizes of sandwiches, sausage rolls etc. Quicker times for coffees.
(Play once a week or more, 65-69 years, Canterbury)

More assertive reinforcement to members about slow play through messaging. Course marshalling. Reduce the extent of rough vegetation where it is easy to lose balls and difficult to find them.
(Play once a week or more, 50-54 years, Wellingotn-Wairarapa)

A more interesting short game practice area and driving range facilities where you can pay for a bucket of balls.
(Play once a week or more, 30-34 years, Auckland)

In my view, the condition of the course could be improved through more sophisticated maintenance techniques and attention to detail. Perhaps a restructuring of green keeper activities and shifts, might provide better outputs for all concerned. I also think there are opportunities for course improvement, at minimal cost, with some creative thinking.
(Play once every couple of weeks, 60-64 years, Bay of Plenty)

A more flexible / pro-rata subscription payment system for people who join during the year.
(Once every couple of months, 55-59 years, Auckland)

Consistent course conditions... there always seems to be something going wrong with the grass/ fairways/ greens etc
(Play every couple of weeks, 30-34 years, Taranaki)



FOCUS OF IMPROVEMENT

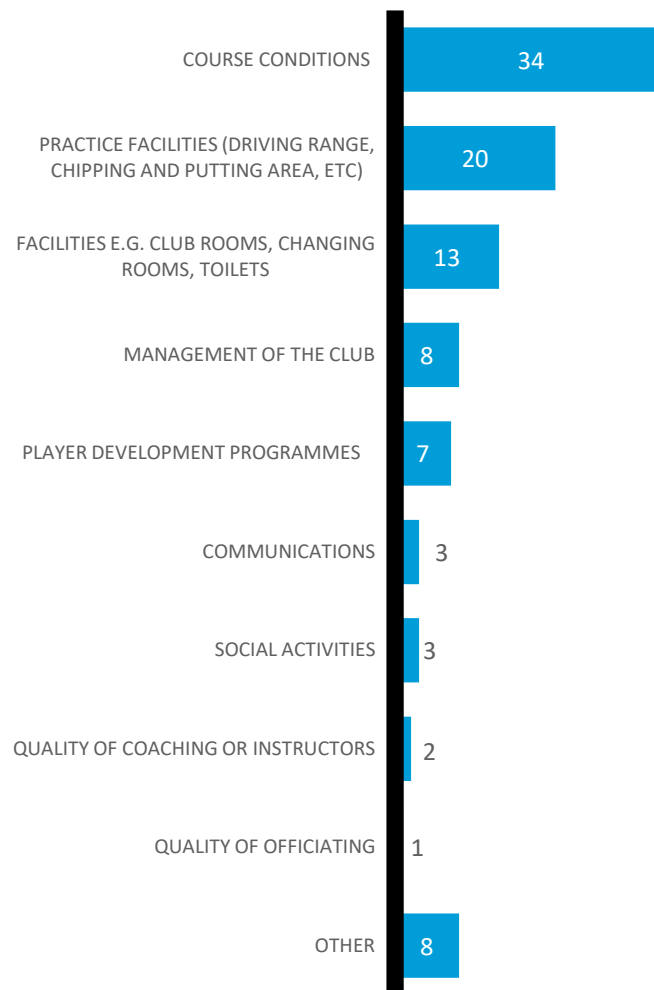
If membership fees were to increase, a third (34%) of members would want this increased investment to be reflected in improvements to *course conditions*. This is followed by *practice facilities (driving range, chipping and putting areas, etc)* (20%) and *facilities e.g. club rooms, changing rooms, toilets* (13%).

Although the base size for parents of players is small (n=25), the highest rated area, with over half (56%) indicating they would like improvement, is in *player development programmes*.



22% would not want anything improved if it meant their fees were increased (22% for players and only 3% for parents of players).

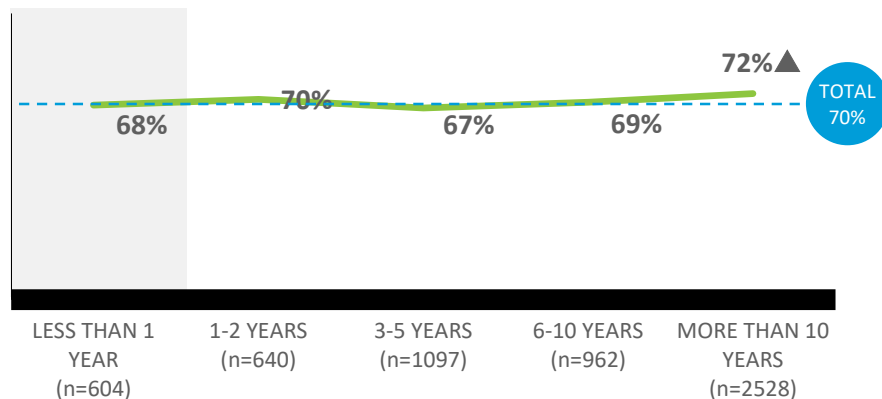
MEMBERS WOULD PAY MORE FOR IMPROVED... (%)



TOTAL GOLF (n=4124)

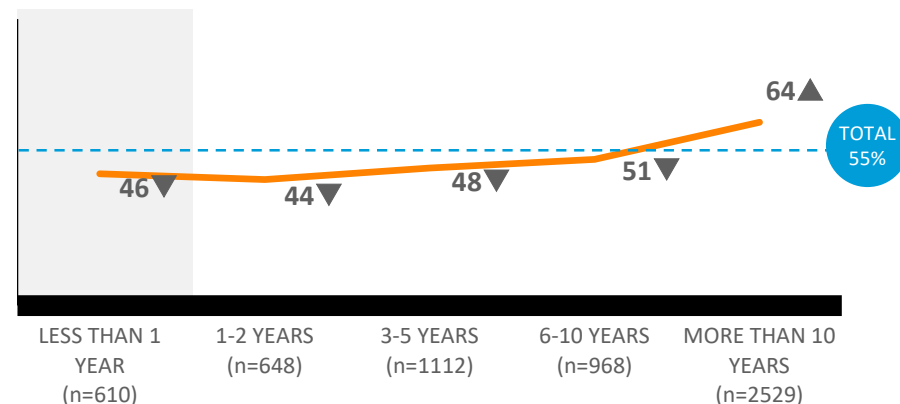
KEY METRICS BY LENGTH OF MEMBERSHIP

OVERALL SATISFACTION



The level of overall satisfaction (those who indicated they are very or extremely satisfied) increases in the first two years of membership before dropping for those who have been members for 3-5 years. The highest level of satisfaction is among members of 10 or more years (72%).

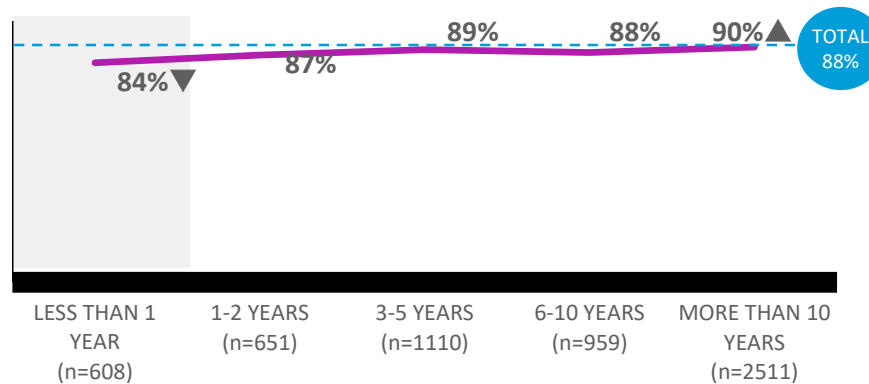
NET PROMOTER SCORE



A similar trend occurs when looking at the NPS (likelihood to recommend their golf club to someone interested in playing golf), with a decrease after the first year, before climbing to a high of 64 for those who have been members for more than 10 years.

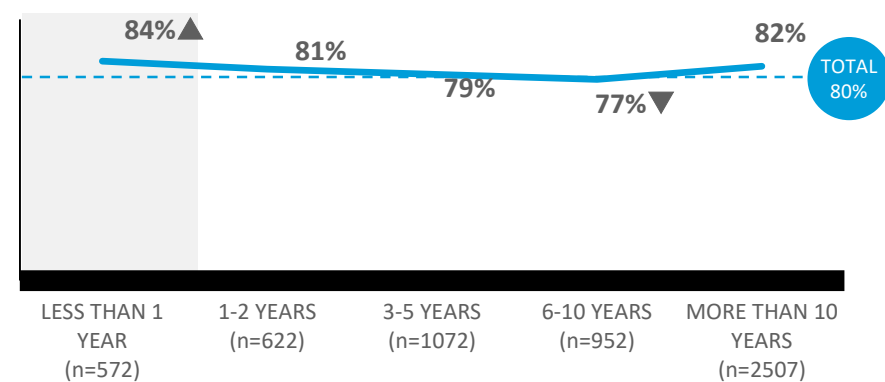
KEY METRICS BY LENGTH OF MEMBERSHIP

LIKELIHOOD TO REJOIN



Member likelihood to rejoin increases from a low of 84% for new members (less than a year) (which is *significantly lower* than the total of 88%) to nine in ten (90%) for members of more than 10 years. Members for this tenure are *significantly more* likely to rejoin (90% cf. 88% total).

VALUE FOR MONEY



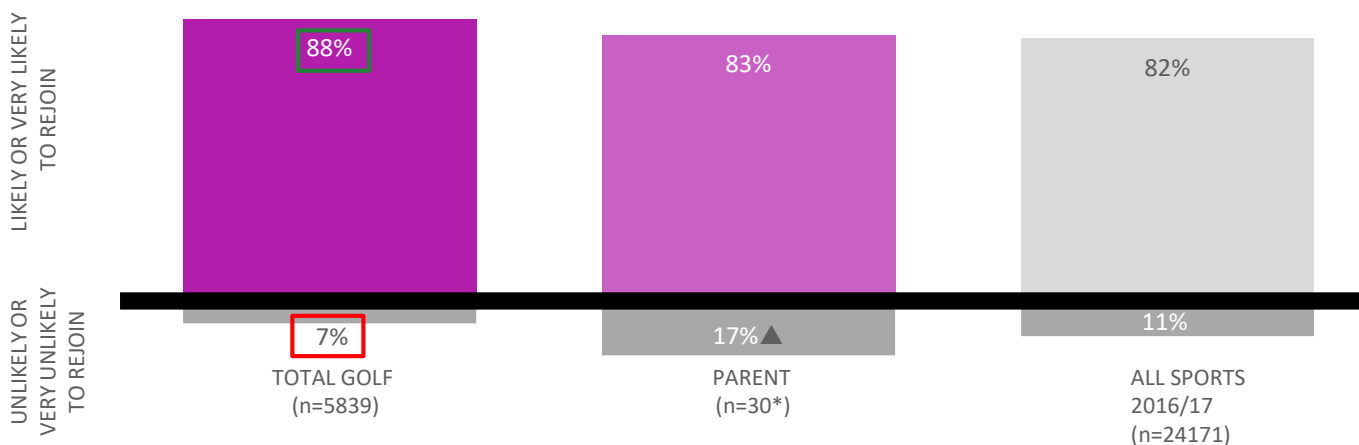
Conversely, the perception of value for money declines over the length of membership from 84% for new members (which is *significantly higher* than the total of 80%) to 77% for those who have been members for between 6 and 10 years (*significantly lower* than the total of 80%).

More than four in five (82%) of members for 10 plus years, agree or strongly agree that *the opportunities, services and benefits that I receive from my golf club make it well worth the money I pay*.

NINE IN TEN RESPONDENTS WILL LIKELY REJOIN

Nine in ten (88%) members are likely or very likely to rejoin their current club next season. This is *significantly more* than the average for all sports in 2016/17 (82%).

A *significantly higher* proportion of parents of players indicated their children are unlikely or very unlikely to rejoin next season (17% cf. 7% of players).



SUB-GROUP DIFFERENCES

Those *significantly more* likely to rejoin their current club are:

- Members for more than 10 years (90% cf. 88%)
- Those who play or train *four or more times a month* (90%) and play at their home club *once a month or more* (89%)
- Very or extremely satisfied (93%) and had not complained in the last 3 month (90%)
- Committee Members (93%) and/ or Paid employees (98%)
- Full Playing Membership (89%)
- Handicap 11 to 20 (90%)
- Members of clubs in the Hawkes Bay (93%) or Otago (92%)

Those *significantly less* likely to rejoin their current club are:

- Members for less than 1 year (84% cf. 88%)
- Those who belong to a club to *get fit and healthy* (85%)
- Those who play or train *once a month or less* (83%) or *two or three times a month* (86%) and play at their home club *less than monthly* (77%)
- Dissatisfied or extremely dissatisfied (58%) and have made a complaint in the last 3 month (80%)
- Those aged 16-24 (79%) or 25-34 years (82%)
- Weekday (83%) or Intermediate Membership (75%)
- Members of clubs in Auckland (86%) or North Harbour (85%)

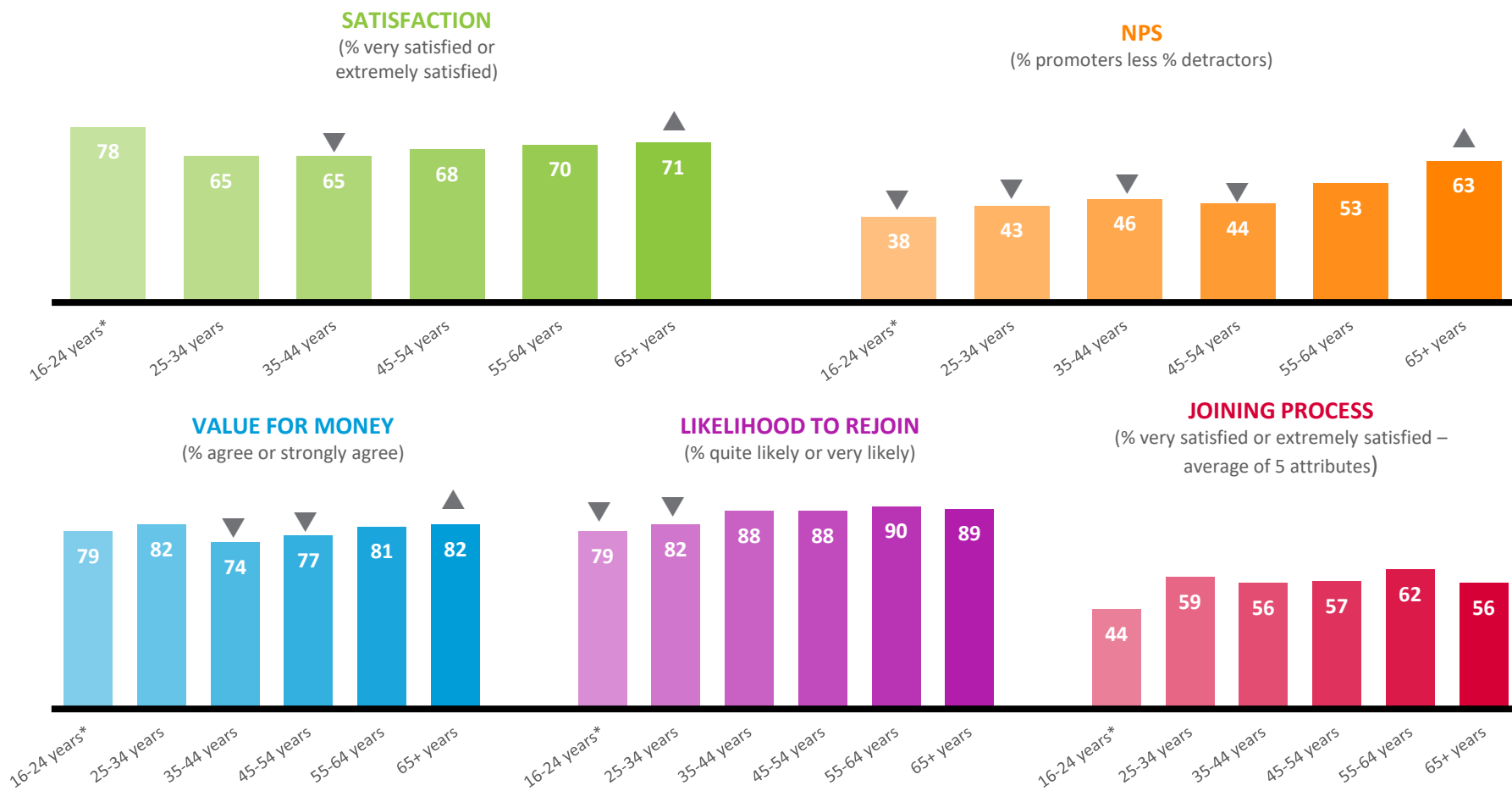
▲▼ Significantly higher/lower than Total Golf

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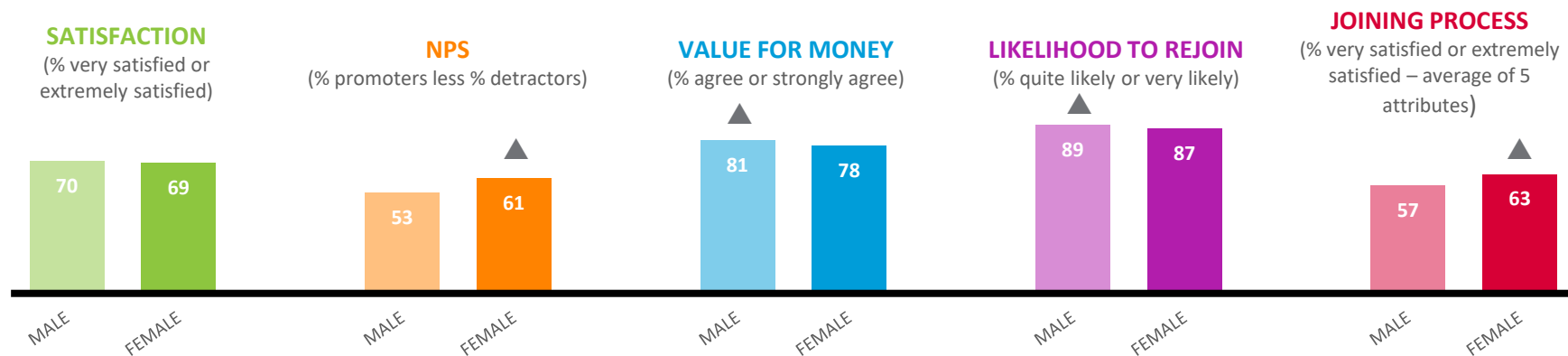
HOW DO KEY METRICS COMPARE BY AGE?

Two thirds (65%) of 25-34 and 35-44 year olds are *very satisfied or extremely satisfied* with overall experience at their golf club. 35-44 and 45-54 year olds perceived the value for money to be lower than other age groups.

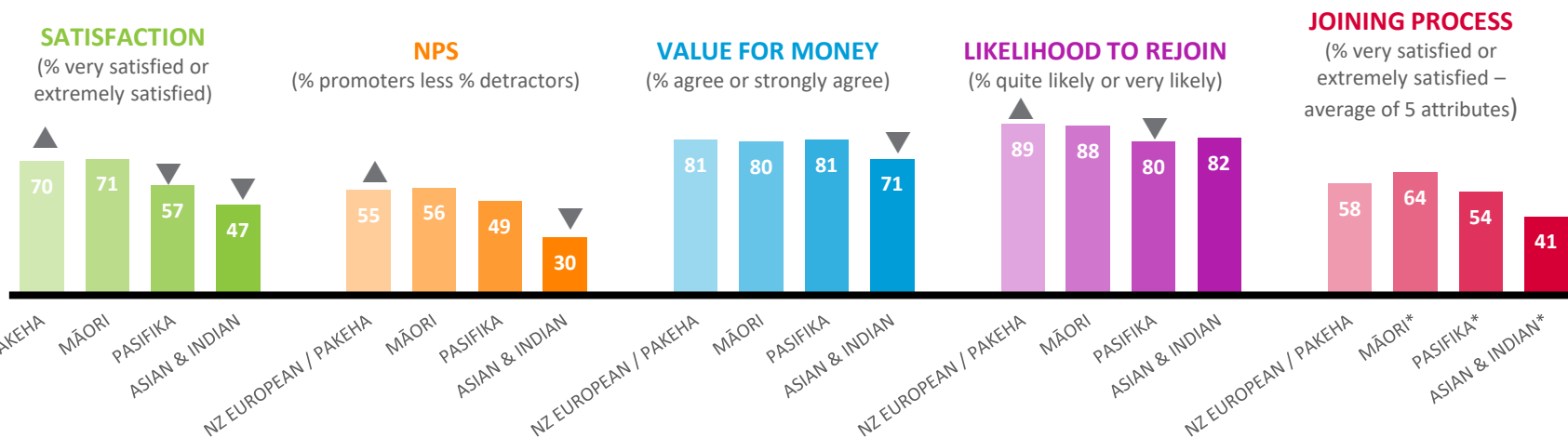
Those aged 65+ are *significantly more* likely to indicate they are satisfied with the overall experience at the club (71%), recommend their club (63 cf. 55), and perceived value for money (82% cf. 80%).



HOW DO KEY METRICS COMPARE BY GENDER?

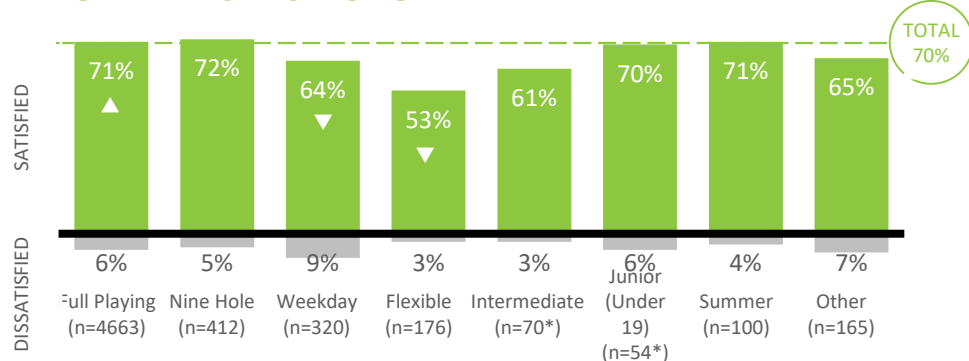


HOW DO KEY METRICS COMPARE BY ETHNICITY?

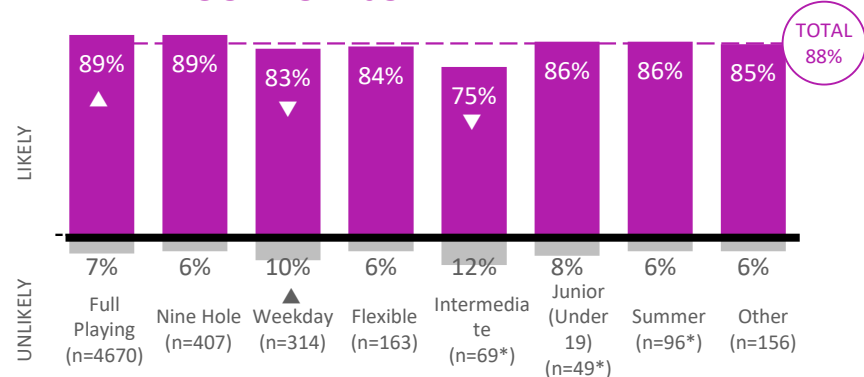


KEY MEASURES BY MEMBERSHIP CATEGORY

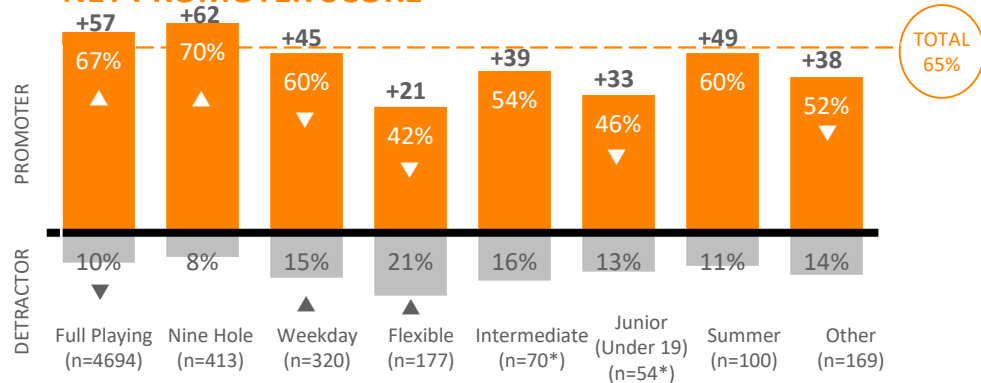
OVERALL SATISFACTION



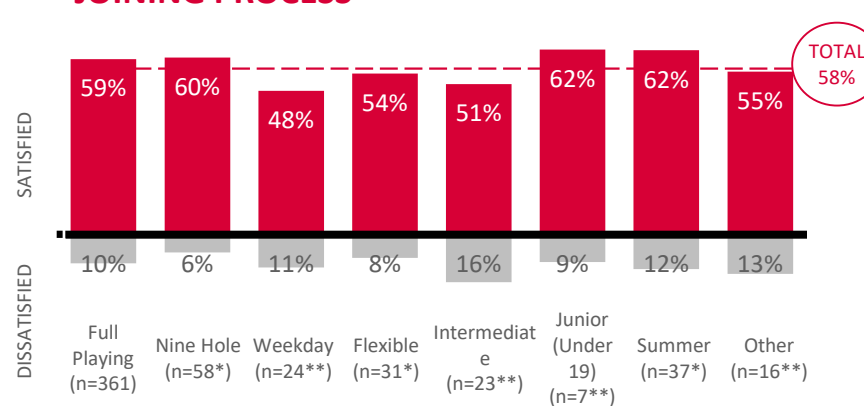
LIKELIHOOD TO REJOIN



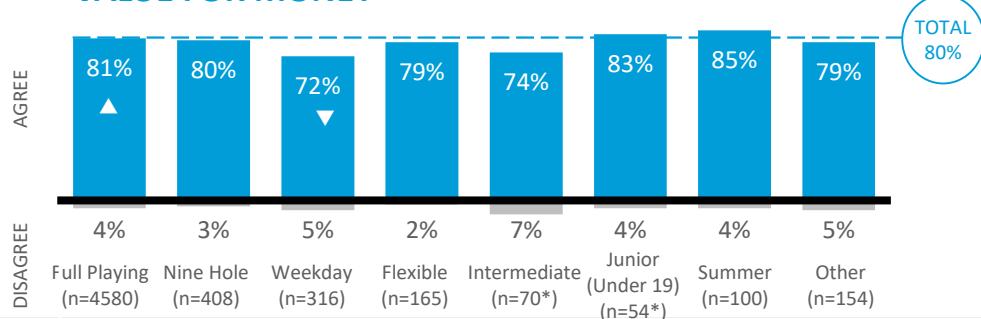
NET PROMOTER SCORE



JOINING PROCESS



VALUE FOR MONEY

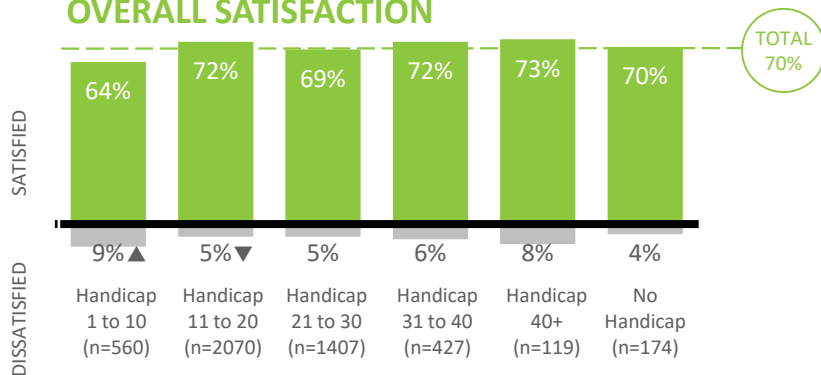


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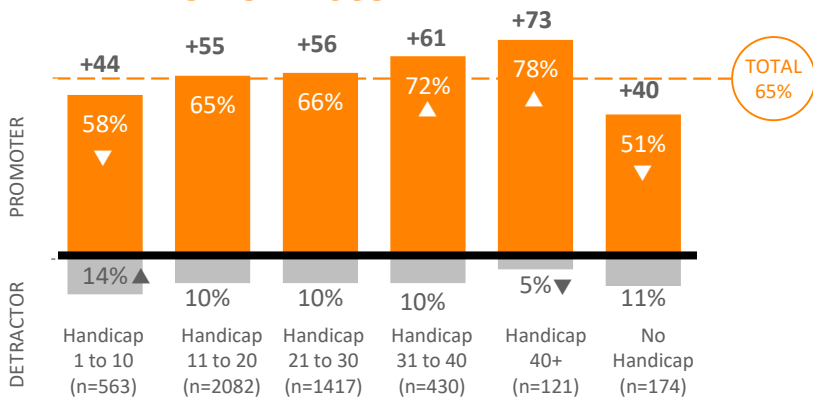
* Small base size; ** Very small base size (ineligible for significance testing)

KEY MEASURES BY HANDICAP

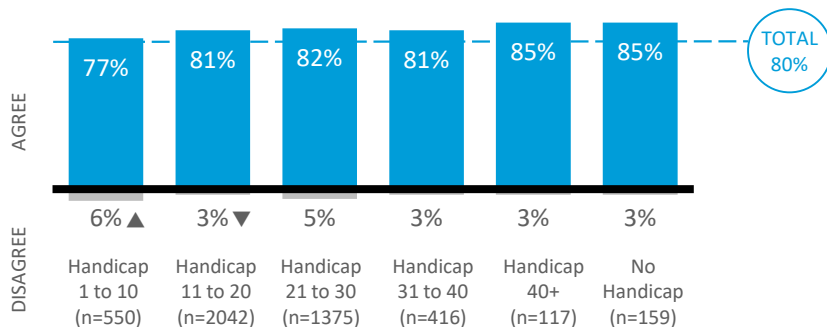
OVERALL SATISFACTION



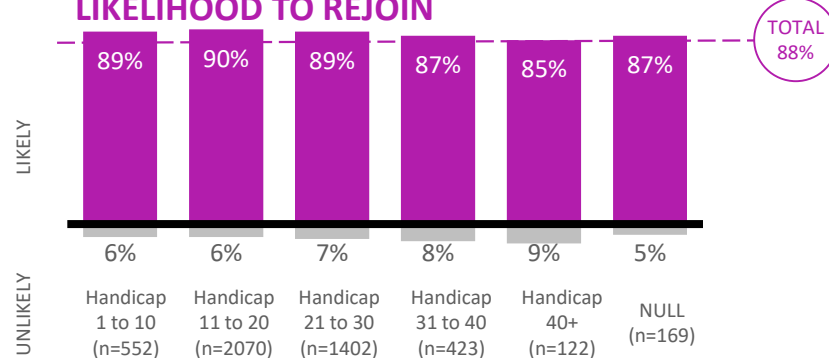
NET PROMOTER SCORE



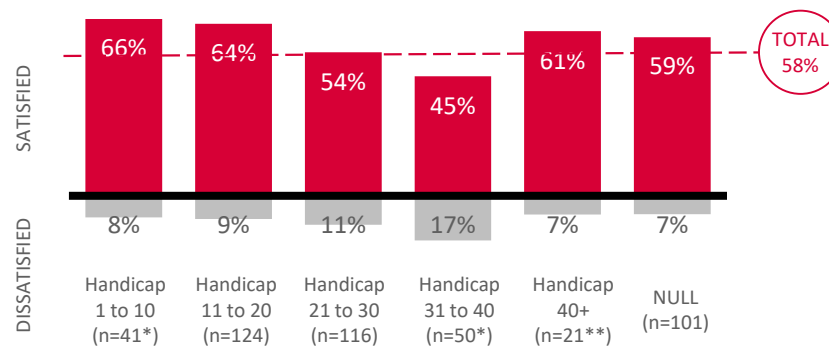
VALUE FOR MONEY



LIKELIHOOD TO REJOIN



JOINING PROCESS

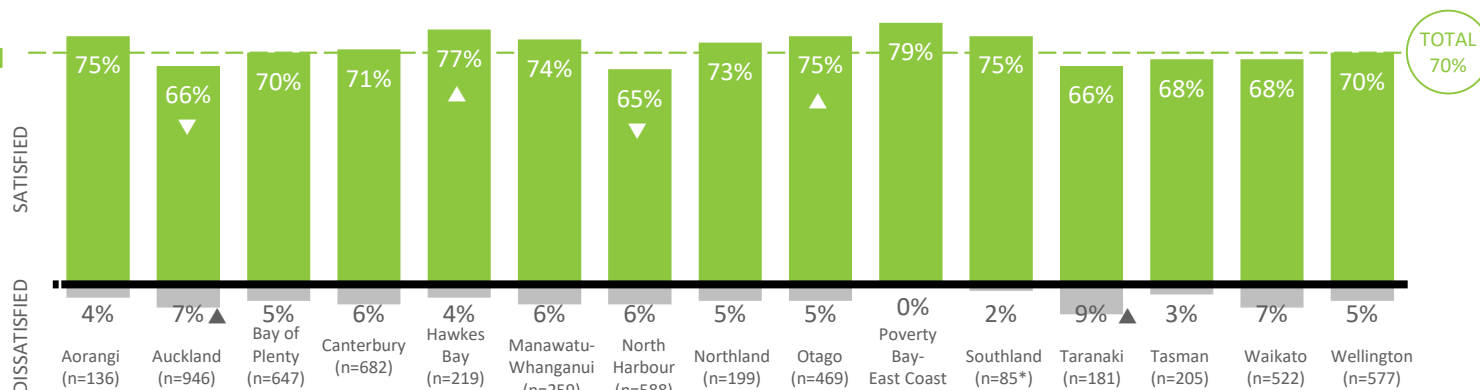


The lower the handicap, the lower the levels of satisfaction. Members on a handicap of 1 to 10 are less likely to be satisfied overall (64% cf 70% total), promoters (58% cf 65%) and have a lower perception of value for money (77% cf 80%).

KEY MEASURES BY DISTRICT

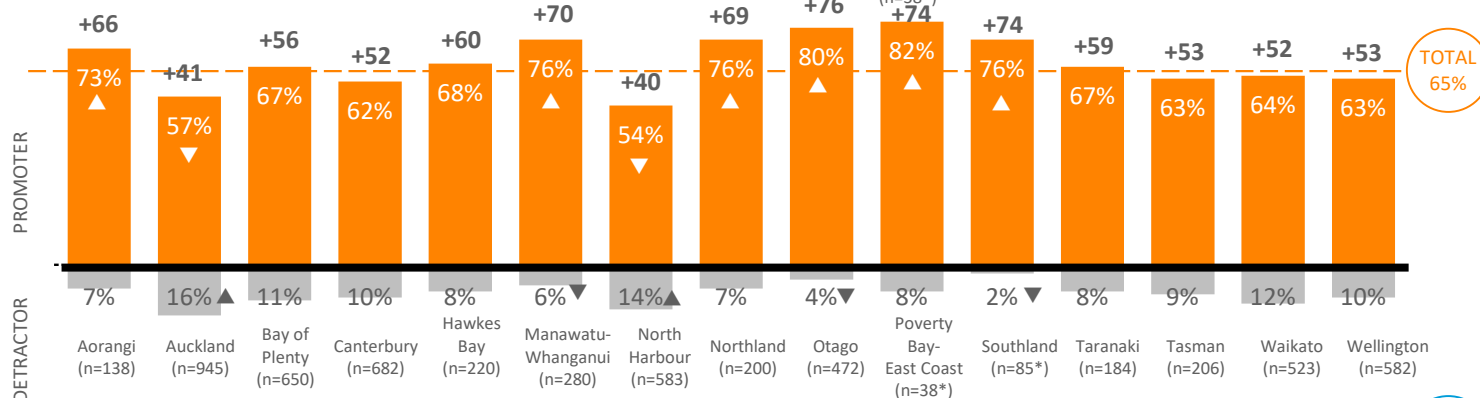
OVERALL SATISFACTION

(Q6: % very satisfied or extremely satisfied)



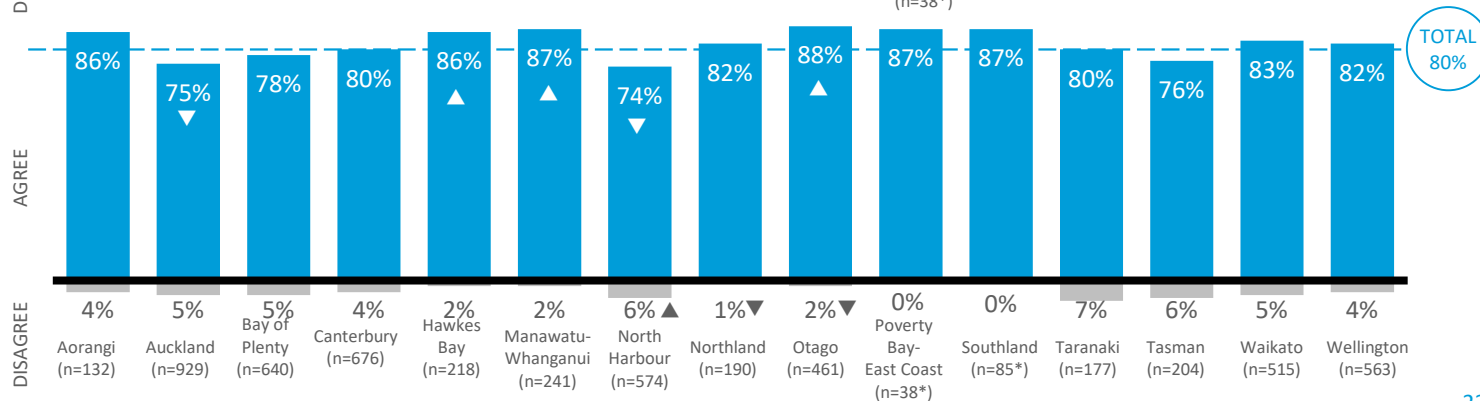
NET PROMOTER SCORE

(Q7: % promoters less % detractors)



VALUE FOR MONEY

(Q11: % agree or strongly agree)



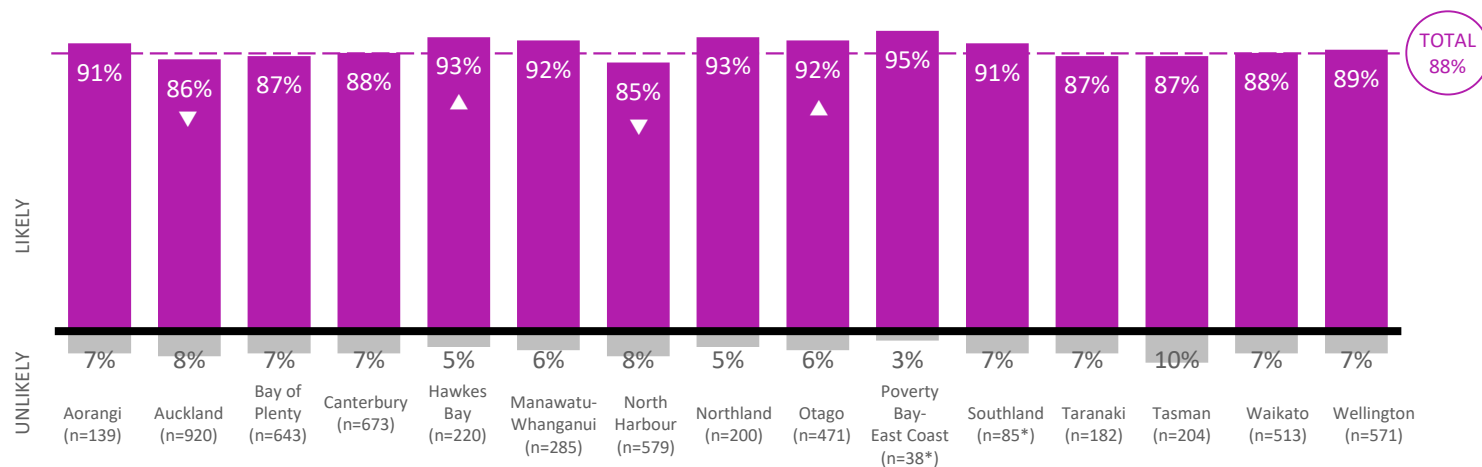
* Small base size; ** Very small base size (ineligible for significance testing)

▲▼ Significantly higher/lower than Total Golf

KEY MEASURES BY DISTRICT

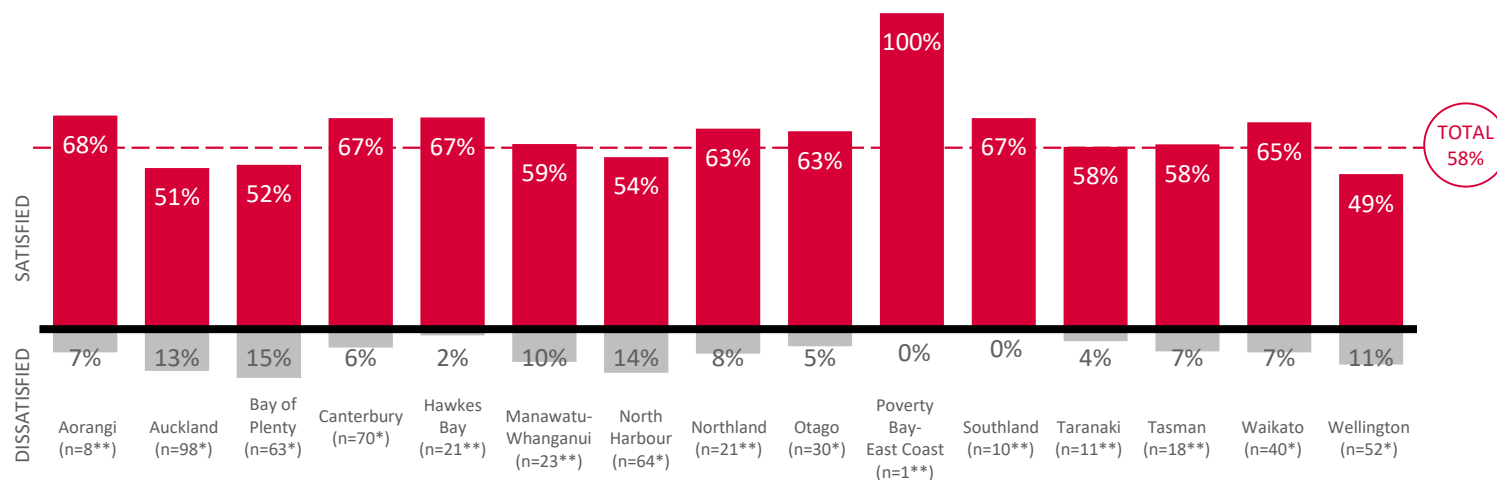
LIKELIHOOD TO REJOIN

(Q9: % quite likely or very likely)



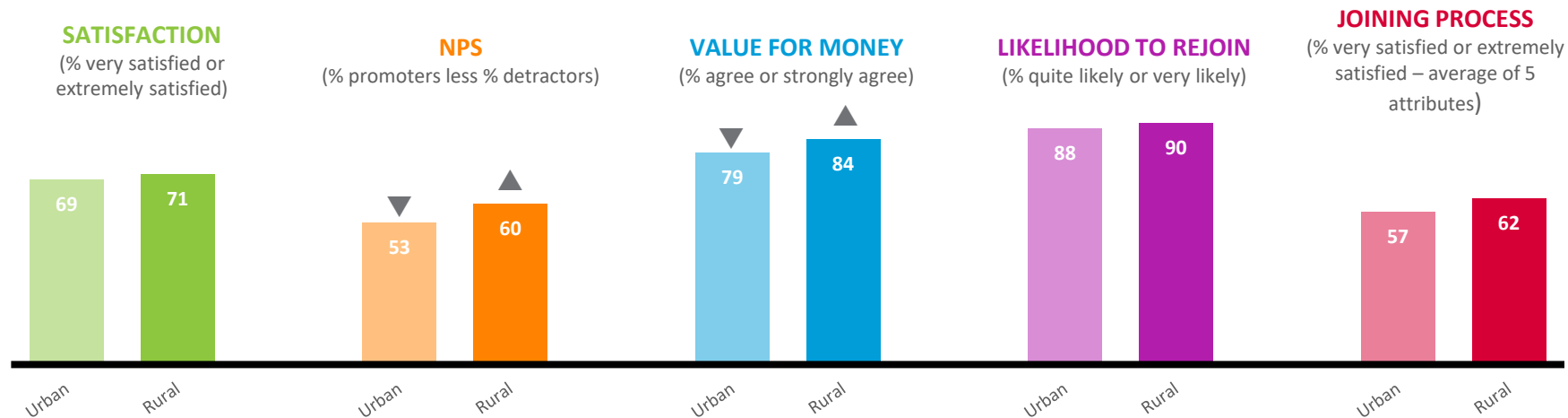
JOINING PROCESS

(Q20: % very satisfied or extremely satisfied – average of 5 attributes)

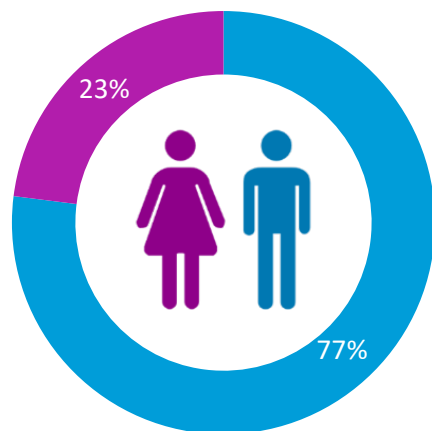


THREE QUARTERS OF RESPONDENTS ARE FROM URBAN CLUBS

Three quarters (75%) of members belong to an urban club with a quarter (25%) members from a rural club. Rural clubs rate higher on each of the key metrics, in particular NPS and value for money where they are *significantly higher* (60 cf. 53 and 84% cf. 79%, respectively). This difference in NPS score is driven by the higher proportion of promoters (9 or 10, with 10 being highly likely to recommend) which are *significantly higher* (69% cf. 63%) while the proportion of detractors is similar.



PROFILE OF RESPONDENTS



- MALE
- FEMALE
- GENDER DIVERSE

AGE

TOTAL GOLF
(n=5977)

AGE	TOTAL GOLF (n=5977)
Less than 16 years	0%
16-19 years	1%
20-24 years	1%
25-29 years	2%
30-34 years	3%
35-39 years	3%
40-44 years	4%
45-49 years	7%
50-54 years	10%
55-59 years	13%
60-64 years	15%
65-69 years	19%
70-74 years	13%
75+ years	9%

PLAYING FREQUENCY

TOTAL
GOLF
(n=5946)

Parent
(n=30*)

PLAYING FREQUENCY	TOTAL GOLF (n=5946)	Parent (n=30*)
Less than once a month	9%	10%
Once a month	8%	13%
Two or three times a month	18%	10%
Four or five times a month	23%	23%
6 or more times a month	40%	33%
Other	3%	10%

REGION

TOTAL
GOLF
(n=5977)

REGION	TOTAL GOLF (n=5977)
Northland	4%
Auckland	28%
Waikato	9%
Bay of Plenty	11%
Gisborne	1%
Hawke's Bay	4%
Taranaki	3%
Manawatu-Wanganui	4%
Wellington-Wairarapa	10%
Tasman	1%
Nelson	1%
Marlborough	1%
West Coast	0%
Canterbury	14%
Otago	7%
Southland	2%
Outside of New Zealand	1%

MEMBERSHIP TENURE

TOTAL
GOLF
(n=5906)

Parent
(n=30*)

MEMBERSHIP TENURE	TOTAL GOLF (n=5906)	Parent (n=30*)
Less than 1 year	11%	23%
1-2 years	11%	30%
3-5 years	19%	30%
6-10 years	16%	3%
More than 10 years	43%	13%