



Consultancy for Sport

Participation and Golf Club Membership

Executive Summary

On behalf of the Club Managers Association of Europe a student led research team was tasked with identifying and exploring initiatives that help participation and ultimately increase club membership in golf.

Secondary research was carried out into the current golf industry to understand trends in participation and membership. It was apparent that there was a significantly higher number of male golfers when compared to female and juniors (KPMG 2017). In addition, when looking at membership numbers there were a considerably higher number of golfers over the age of 35 (England Golf 2016). The research team identified four key components impacting participation in golf, these are the following; participation, expense, marketing and perceptions. These were used as focus points when adopting our research strategy, in which two questionnaires were designed to collect primary data.

A cross-sectional research design was adopted for this study. Two questionnaires were produced, analysed and distributed through Bristol Online Survey (BOS). Due to the nature of the questionnaires, quantitative data was collected along with a small amount of qualitative data, using open ended questions. The final sample size for the club member questionnaire was 142 and the non-golfer's questionnaire was 104.

The results showed time constraints involved with work and family life, are having a negative impact on participation and membership. However, golf is still deemed an expensive sport with the average golfer spending double what other people spend on their sports. In addition, when analysing the qualitative data in depth, members believe their clubs marketing efforts were insufficient and unprofessional. Perceptions of golf between golfers and non-golfers were very similar, stating that golf was a game that is still too expensive, time consuming and technical.

In conclusion, recommendations were made by the research team to improve participation and membership numbers. These included offering more flexible and academy memberships, developing a marketing plan, introduction of shorter formats and making golf more affordable for beginners.

Contents

1.0 Introduction	5
1.1 Aim	5
1.2 Objectives	5
2.0 Current Golf Industry	7
3.0 Membership Trends	9
4.0 European Context	11
4.1 European Golf Course Owners Association report	12
5.0 Methodology	14
5.1 Research Design	14
5.2 Piloting	15
5.3 Procedure	15
5.4 Sample	16
5.5 Limitations	16
6.0 Case Study: Cricket	17
6.1 Introduction	17
6.3 The New Exciting Game	17
6.2 Strategic Goals and Objectives	17
6.4 What Golf Can Learn	17
7.0 Case Study: Tennis	18
7.1 Introduction	18
7.2 Strategic Goals and Objectives	18
7.3 ATP Shortened Format	18
7.4 What Golf Can Learn	18
8.0 Current initiatives	19
8.1 Get into golf	19
8.2 County Impact Report (1 st April – 30 th September 2016)	20
8.3 Vision 50/50	21
8.4 Vision 50/50 training program	21
9.0 Results and Analysis	23
9.1 Questionnaire Observations	23
9.2 Participation	24
9.3 Expense	27
9.4 Marketing	29
9.5 Perceptions	33
10.0 Recommendations	35
11.0 Academic References	37

12.0 Appendices	41
APPENDIX A: KPMG European Statistics between registered golfers and participation rates.	41
APPENDIX B: Golf Club Membership and Participation Questionnaire	42
APPENDIX C: Non-Golfers Perception Questionnaire	57
APPENDIX D: Responses for ‘other’ on Non-golfers Questionnaire	65
APPENDIX E: BOS Instructions to create and distribute a pilot study.....	67

List of Figures

Figure 1: Distribution of golf across Europe, (KPMG 2017).	7
Figure 2: Participation rate relative to number of registered golfers, (KMPG 2017).	8
Figure 3: Membership by Age Group 2014 vs 2016 (England Golf 2016)	9
Figure 4: Percentage of registered golfers across Europe (EGCOA 2017).....	11
Figure 5: What sport do you participate in? (Non-Golfers Perceptions Questionnaire)	14
Figure 6: Do you believe not being a member of a golf club affects your participation? (Golf Membership and Participation Questionnaire).....	24
Figure 7: What is the main reason for not continuing your membership? (Golf Membership and Participation Questionnaire)	24
Figure 8: Has your participation increased, decreased or stayed the same since not being a member? (Golf Membership and Participation Questionnaire).....	24
Figure 9: How do you prefer to spend your time participating in golf? (Golf Membership and Perceptions Questionnaire)	25
Figure 10: How much on average do you spend on your sport? (Non- Golfers Perceptions Questionnaire).....	27
Figure 11: Do you perceive golf to be expensive? (Non- Golfer Perceptions Questionnaire)	27
Figure 12: What are the main reasons for not joining a golf club? (Golf Membership and Participation Questionnaire).....	28
Figure 13: Do you feel your club does enough to promote their membership? (Golf Membership and Participation Questionnaire)	29
Figure 14: How did you get into Golf? (Golf Membership and Participation Questionnaire)	30

List of Tables

Table 1: What is the most important factor when looking for a golf club membership? (Golf Membership and Participation Questionnaire).....	31
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List of Abbreviations

CMAE	Club Managers Association of Europe
BOS	Bristol Online Survey
UK	United Kingdom
EGCOA	European Golf Course Owners Association
ECB	England Cricket Board
LTA	Lawn Tennis Association
ATP	Association of Tennis Professionals
SGF	Swedish Golf Federation
BUCS	British University and College Sport

1.0 Introduction

Golf today is in a declining market, with the pressures of time, money and family life inhibiting one's ability to engage in physical activity (Independent 2014). This report produced by Bournemouth University students, on behalf of the Club Managers Association of Europe (CMAE), will attempt to underline key initiatives within the golf industry, whilst exploring the barriers which prevent 'nomadic golfers' advancing into golf club membership. This report also seeks to provide solutions to the current problem offering detailed analysis on how golf clubs can implement strategies to increase participation and membership.

1.1 Aim

To identify, explore and contextualise initiatives encouraging golf participation and membership, tasked with taking people to the next stage of becoming a regular golfer and ultimately a club member.

1.2 Objectives

1. Identify the key components why golf clubs are struggling with membership.
2. Recognise the differences in golf participation throughout Europe.
3. Explore the barriers which prevent beginners progressing into golf club membership.
4. Compare and understand the perceptions surrounding golf clubs.
5. Outline the most successful initiatives in increasing golf participation.
6. Implement recommendations for golf clubs and governing bodies as part of a strategic plan.

The report will focus on initiatives that work best to enhance golf participation and membership, as well as outline a strategic plan to give golf clubs and governing bodies the best chance at securing and retaining golfers. Golf has traditionally had a stigma for being very old-fashioned, expensive and only available to the wealthy, however in recent times it has become more accepted as a sport available to

all. That is not to say that the traditions of the game are changing, as golf is still a game with complex rules, time constraints and is difficult to learn due to its bio-mechanical nature.

The research team have outlined four key components that may inhibit the opportunity to play golf;

PARTICIPATION

EXPENSE

MARKETING

PERCEPTIONS

These four components will be discussed in depth throughout the report, suggesting strategies and recommendations to improve the participation rate and ultimately the membership numbers.

2.0 Current Golf Industry

Over the past two decades, golf has enjoyed a period of constant growth throughout Europe (KPMG 2017). The rise of disposable income over the last twenty years has led to an increase in golf club membership (Trading Economics 2018). However, due to the financial crash in 2008 (Adebambo et al, 2015) and 2011 crash in Europe (World Politics Review 2011), participation and membership numbers have experienced a decline.

More recently, the golf industry has stabilised somewhat, with the player participation rate increasing by 1.2% in 2016 (KPMG 2017). Furthermore, the report states that 79% of nations in Europe are in a stable condition or could recognise growing membership numbers since 2016. The market is still dominated by males with a 67% representation and staggeringly, only 8% of all golfers are represented by juniors. Junior golf is key to growing the game, therefore Europe must focus on junior participation.

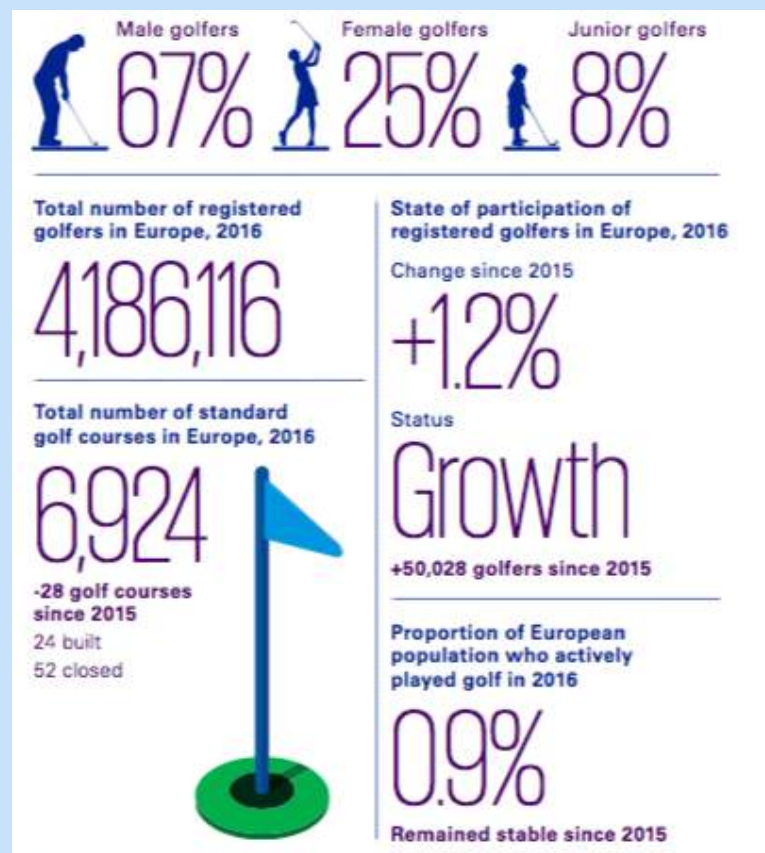


Figure 1: Distribution of golf across Europe, (KPMG 2017).

It is also worth noting that out of 7,233 golf courses across Europe, almost one third are located in England. Germany only offers 732 courses which equates to 10% of golf courses in Europe (Statista 2017). In contrast to that only 6% of golf courses are located Sweden, however, participation statistics significantly outweigh those of England and Germany. Only 0.8% of the German population participates in golf, in comparison to Sweden where 5.4% regularly participate. This suggests that the participation rate and the availability of courses are not strongly interlinked.



Figure 2: Participation rate relative to number of registered golfers, (KPMG 2017).

Figure 2 shows participation levels against the number of registered golfers. The graph shows England has a high number of registered golfers, yet has a very low participation rate. Germany, is currently the second largest golf nation but doesn't feature on this graph. Despite having several courses and registered golfers their participation rate is only 0.79% (KPMG 2017). The graph does indicate that Iceland and Sweden have the highest participation rates however, a very small percentage of registered golfers. This graph is an excellent representation of the disparity of golf showing that excluding the United Kingdom (UK) people are participating, but more interestingly are not wanting to take up membership. Appendix A shows the European statistics between registered golfers and participation rates in full.

3.0 Membership Trends

Golf participation has decreased drastically due to increased competition, declining loyalty and the perception that golf does not offer value for money (England Golf 2017). This has caused an increasingly cluttered landscape whereby golf clubs are having to compete to gain members (England Golf 2017). According to England Golf (2017) the average golf club membership in the UK costs around £850 per year. In addition, predominantly private members clubs have the added extra cost of a joining fee (England Golf 2014). When relating this to the average annual salary of a 22-29-year-old being just £18,000 after taxes, it becomes harder for younger people to invest in membership (Daily Mail 2017). In addition, this creates an unbalanced economy, with inflation on the rise to 3% and the future growth of the UK falling by 0.5% (BBC News 2017).

Figure 3 shows that since 2014, the growth of golf membership has stagnated through most of the age groups in the UK, although it has increased in the over 65's, thus showing that golf is a difficult game to participate in through your working life and becomes more accessible once retired (England Golf 2016). However, the golf industry has realised this trend and has recently put in place new membership categories to combat this decline, and attempt to target the younger and working generation. An example of some of these membership categories are; 5-day, flexible, student, intermediate and academy memberships.

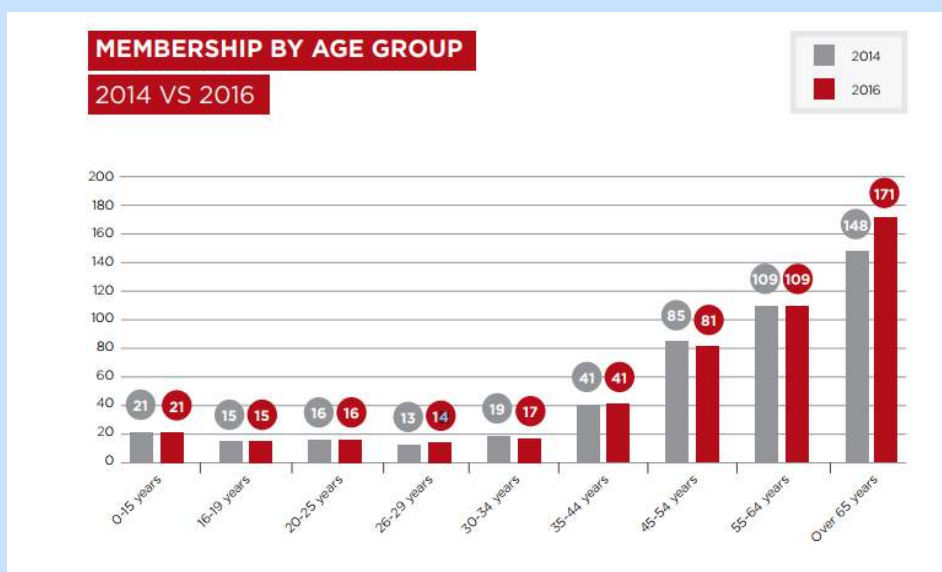


Figure 3: Membership by Age Group 2014 vs 2016 (England Golf 2016)

Flexible memberships have become more popular, whereby golfers pay a relatively small membership fee, and pay reduced green fees every time they play (Dunsmuir 2017). Golfers today, will tend to adopt this membership category to coincide with their lifestyle. This membership category allows them to be a member of a club, albeit for a cheaper annual rate to match their participation (Longmire 2013).

Female participation has always been a challenge, due to golf being perceived as a male dominated sport (Danylchuk et al, 2015). This can be seen in a study published by KMPG (2017) which showed out of 3000 golf clubs across the UK and Ireland only 14% of all golf members were female (Hutchinson 2016). Therefore, if participation rates are to increase the UK and Ireland, female participation needs to be addressed. An example of the golf industry trying to combat female participation was the recent decision to allow women members into Muirfield Golf Club. Muirfield first voted not to let women become members, which resulted in them losing the right to host the Open Championship. Since then, Muirfield have re-voted which resulted in 80% of members in favour of allowing female membership, so now for the first time in Muirfield's history women can become members (Guardian 2017).

Finally, it is important to increase junior participation. Golf clubs are attempting to do this through offering academy memberships and free taster sessions where lessons and equipment are included (England Golf 2017). Programs including Get into golf run events, with schools and local clubs enticing juniors to take part in the sport and join a club (Get into Golf 2017).

4.0 European Context

There are 7,233 golf facilities across Europe 1,487 being private and the other 5,746 being public courses (EGCOA 2017). The economic crisis across Europe in the last 10 years has caused the growth of the golf industry to plateau, however in recent times there has been some positive statistics regarding European participation and membership figures.

Figure 4 is a representation of the distribution of registered golfers across Europe. The chart shows that the leading three golf nations are England, Germany and Sweden. Nevertheless, this is based on the number of golfers and doesn't show the participation rates, unlike figure 2. This again portraying the disparity between registered golfers and participation rates. These nations, along with their national governing bodies, need strategies to combat this to further the growth of the golf industry.

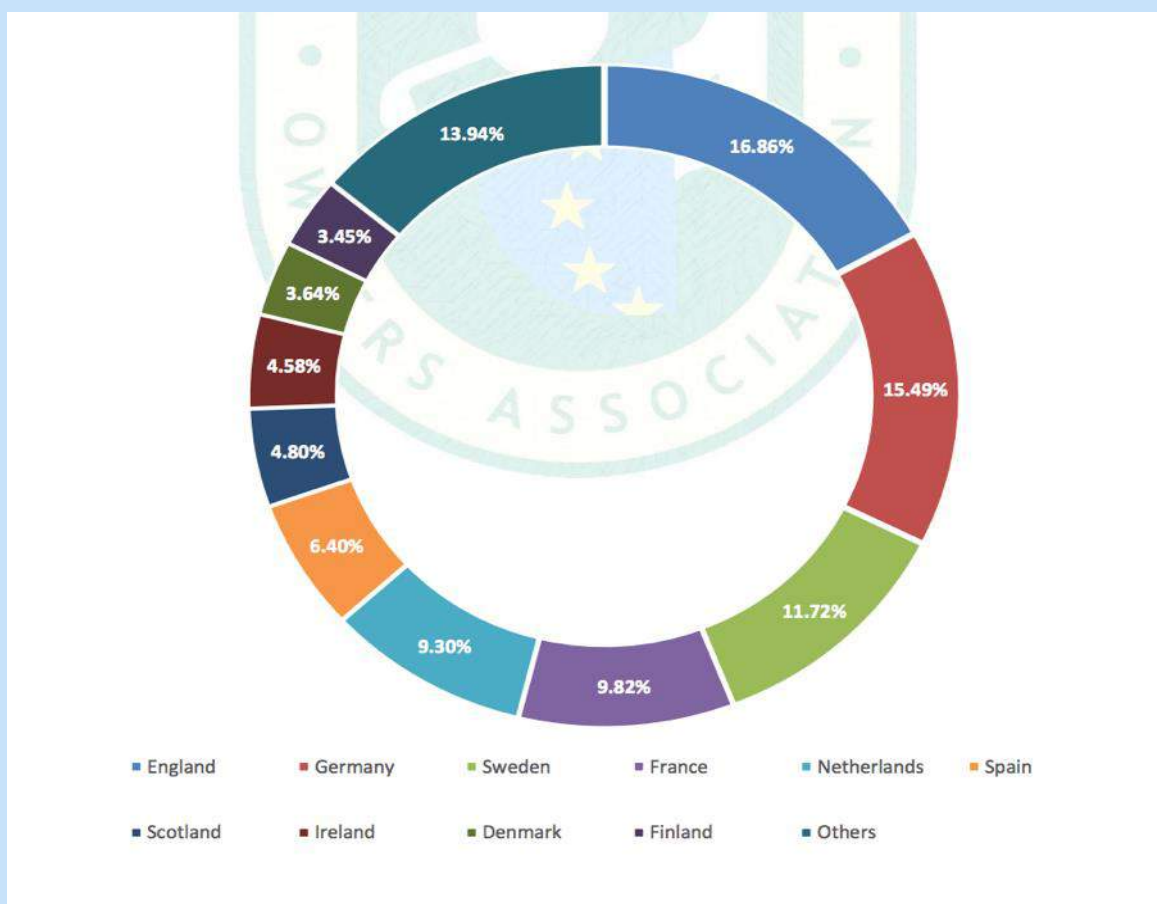


Figure 4: Percentage of registered golfers across Europe (EGCOA 2017)

4.1 European Golf Course Owners Association report

Along with the KPMG report (2017) the European Golf Course Owners Association (EGCOA) published a similar report regarding European golf statistics. They have very similar comparisons to KPMG's report regarding registered golfers and participation rates.

The EGCOA (2017) report discusses female and junior participation levels in depth. The registered number of female golfers fell by 13,000 between 2015 and 2016, although the percentage of females playing golf remained stable. When discussing the percentage of female golfers per country, Germany, Austria and Switzerland are leading the way, averaging a 35% representation of all female golfers within their respective countries. Worryingly the three worst performing countries are all within the UK. England, Scotland and Wales are averaging 13% of female registered golfers. When discussing this statistic, it is clear to see that Europe are heavily involved in increasing female participation, through strategic plans outlined by national governing bodies. This trend demonstrates a lack of focus on female participation throughout the UK and is something that needs to be addressed.

Furthermore, junior participation is also on the decline throughout Europe. Between 2015 and 2016, the registered number of junior golfers fell by 16,000, outlining the fact that juniors are only represented by 8% throughout Europe. Interestingly, Denmark, Netherlands and Switzerland, who showed positive results regarding female participation, are the worst three performing countries in junior golf. Research from EGCOA (2017) resulted that the junior programs offered throughout Europe, tend to be more casual than structured. Whilst these programmes are a fantastic starting block for juniors to get into golf, there is no follow through into regular participation and membership.

Sweden and Germany, who lie second and third respectively in terms of registered golfers, are focusing their efforts on female and junior golf, making the sport more family orientated, to try and get everyone involved from a beginner level (Swedish Golf Federation 2017). The

Swedish Golf Federation (SGF) (2017) are also involved in a change project to make golf more of an equal sport, despite already having a 28% representation of female players.

5.0 Methodology

5.1 Research Design

A cross-sectional research design was used for this study, as a sample of the overall population was taken and relationships within the data identified (Levin 2006). A mix of quantitative and qualitative data was collected using two online questionnaires. Questionnaires were deemed to be the most appropriate method of data collection as relatively simple data was being collected from a large sample size (Gratton and Jones 2015). Two questionnaires were produced; the first was the Golf Club Membership and Participation questionnaire, which aimed to target golf club members and people who participate on a regular basis. The second questionnaire was the Non-Golfers Perceptions questionnaire. Please refer to appendix B and C for the Questionnaires. The research team identified non-golfers as people who have never played golf, yet have experience in other sports and physical activity, *figure 5* shows the variety of sports the non- golfer participated, the responses for other can be seen in appendix D. This sample improved the validity of our responses. Through producing both these questionnaires the research team gained multiple perspectives which enabled them to analyse and compare the results.

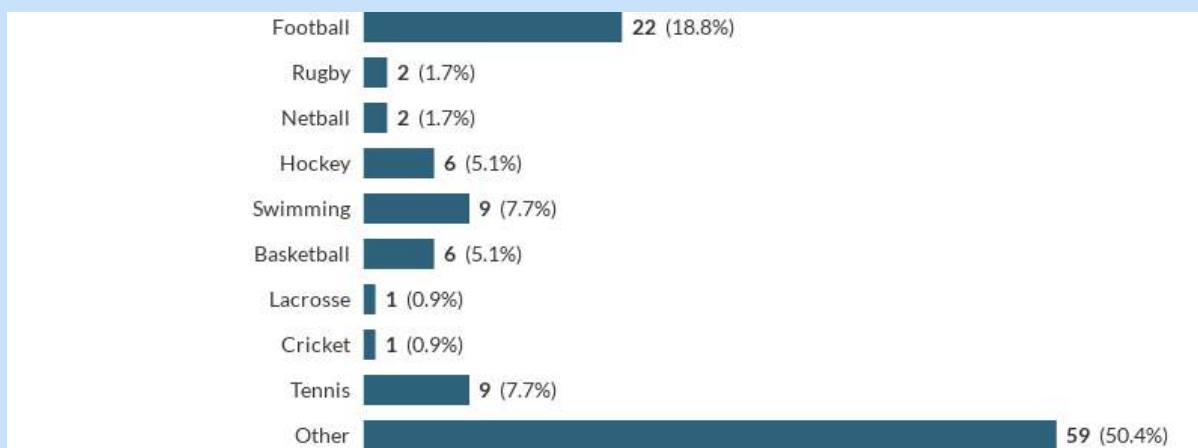


Figure 5: What sport do you participate in? (Non-Golfers Perceptions Questionnaire)



5.2 Piloting

Before the final completed questionnaires were sent out, a pilot study was conducted to pre-test the online questionnaires. This gave research team an advanced warning about where the main research project could fail. Conducting a pilot study enabled the researchers to check the structure and wording of the questions as well as the opportunity to view how the data would be captured and processed (Teijlingen and Hundley 2001). Using Bristol Online Survey (BOS) had an advantage when conducting a pilot study, as it gave us instructions on how to distribute the survey as a pilot study, without reviewers needing access to a BOS account, instructions can be found in appendix E. These pilot questionnaires were sent out to a handful of participants from each target group, and changes were made accordingly.

5.3 Procedure

The research study involved collecting data from individuals throughout Europe. Therefore, the research team decided to use the online questionnaire platform BOS to create, distribute and analyse the results. The use of this online platform made it easier for the research team to gain access to individuals who would be difficult to reach otherwise (Wright 2005). Another advantage of the online questionnaire was it enabled the research team to ask contingency questions, so questions which were irrelevant to some respondents were skipped (Valerie and Ritter 2007). The main style of questions used in the questionnaires were multiple choice and Likert scale ranked questions as they are quick to answer and easy to analyse (Valerie and Ritter 2007). A small number of open-ended questions were used to capture the respondent's own words, when there were too many possible answers to list, yet these were more complex to analyse so were kept to a minimum (Reynolds 2006). The questionnaires were distributed via email to golf clubs across Europe through personal contacts or online email addresses, as well as social media.



5.4 Sample

The finale sample sizes were as follows;

- Golf Members and Participation – 142
- Non- Golfers Perceptions – 104

Convenience sampling was used to recruit respondents; potential participants were able to self-select themselves into the sample through the link sent to golf clubs and posted on social media (Valerie and Ritter 2007). There were no restrictions with regards to participation and no controls to prevent multiple submissions. To target people within the golf industry and throughout Europe the Golf Participation questionnaire was distributed via email to Golf Club managers across Europe. Whereas to target the non-golfer's, social media platforms were used. The research team had an advantage of mixed nationalities which also helped when trying to target other clubs across Europe.

5.5 Limitations

There was no limit on the number of respondents on the online survey, therefore we got a total of 246 responses across both questionnaires. Furthermore, with the sampling being convenience sampling it is unlikely it is representative of the population as the people involved in the study will have a general interest (Valerie and Ritter 2007). In addition, the number of British respondents compared to those of other nationalities are significantly higher, therefore the study may not be a full representation of Europe.

6.0 Case Study: Cricket

6.1 Introduction

In 2014 there was a 64,000 drop in monthly participation, to combat this the England Cricket Board (ECB) partnered with Sport England to create 'Chance to Shine', an initiative aimed to increase participation. Since the Chance to Shine campaign has been initiated there has been an increase in participation in Under 18-year olds, with cricketers becoming interested at the beginning of their career from the age of 5 (The Wimbledon Club 2017).



'Helping introduce and keep young people involved in sport through making the game more enjoyable and easier to play'

6.2 Strategic Goals and Objectives

Sport England (2014) and Chance to Shine (2014) have created several aims and objectives to improve participation. These are as follows;

- The cricket foundation will deliver cricket programmes to over 1,000 state schools across the UK.
- Improving access to cricket clubs and helping 16-18-year olds gain coaching qualifications.
- Lowering the participation drop-out rate in adolescents aged 14-16.
- Following on from the 2012 Olympics to 'Inspire a Generation'.

6.3 The New Exciting Game

A shortened game was created which is completed within two hours to help maintain excitement (Loughborough Sport 2017). This can be played indoors or outdoors and involves the following set up;

- 8 a side.
- Soft ball indoor, hard ball outdoor.
- 16 overs per side.
- Fielder and bowler rotation.
- Inter-school and inter-club competitions.

6.4 What Golf Can Learn

Shank and Lyberger (2015) state that sports should last less than three hours to maintain excitement.

In cricket this has been supported by the T20 format, this shortened format has helped different demographics of players to participate in the game whilst also increasing participation in grass roots level (Martin 2017). Golf is now starting to replicate these shorter formats, with the introduction of golf sixes (European Tour 2017). This new format can help boost the excitement of the game, which in turn can help increase grass roots participation and ultimately membership.

7.0 Case Study: Tennis

7.1 Introduction

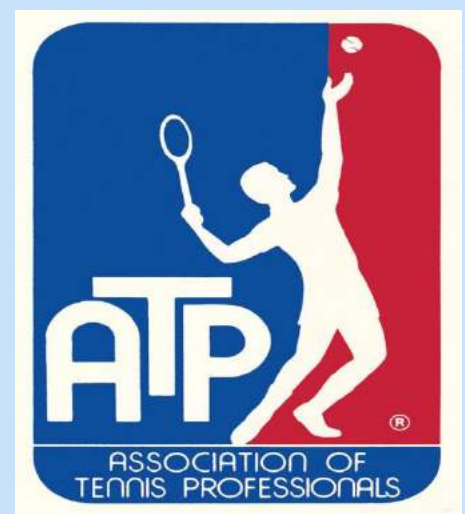
Between 2009 and 2014 there was a drop of 293,000 monthly players, which included a 100,000 increase in 2012 because of the British Success in the Olympics (Statista 2017). Therefore since 2014 the Lawn Tennis Association (LTA) have been looking for ways to improve tennis participation. They have joined with the Association of Tennis Professionals (ATP) to create some grass roots all the way up to elite initiatives, to combat participation levels and the perceptions of tennis being ‘traditional’ (LTA 2016)



7.2 Strategic Goals and Objectives

The LTA (2017) have invested £250million to improve facilities across the UK, in order to increase accessibility to the game. These are the objectives they hope to achieve;

- Making the game shorter and more exciting.
- Increase the number of covered and floodlit courts by 50%.
- Double the number of U16 players in tennis.
- Encourage adults to play more often and all year.



7.3 ATP Shortened Format

The ATP Tour (2017) created a ‘Next Gen’ Tour for any Under 21 players in the Top 200 in the world to join. The game is quicker and with format matches finish well within 2 hours. According to ATP Tour (2017) with no advantage scoring, breaks of serve are more likely, meaning every point counts.

- All matches are best of 5 sets, with sets going to 4 games only.
- Tie break at 3- All.
- No advantage scoring: Sudden death at Deuce
- No Lets and 25 second shot clock

7.4 What Golf Can Learn

As discussed with Cricket, shortened formats keep the game more exciting which will help improve participation. Although golf has started introducing new formats such as TopGolf (which can be played by anyone), barriers to membership need to be broken down to increase participation and ultimately increase membership rates.

8.0 Current initiatives

National governing bodies and government initiatives are already in place to try and combat the problem of golf club membership and participation. These include the following; Sky Sports, England Golf, SGF and many more.

8.1 Get into golf

Get into golf is a national initiative within the UK, tasked with introducing golf to beginners through awareness, taster sessions and open days. Get into golf (2017) have teamed up with England County Golf partnerships as well as the Professional Golf Association (PGA) to promote activities and courses, designed to include free coaching, taster sessions and information about local golf facilities, membership and even volunteering opportunities. Not only does it give you the opportunity to play golf, but it gives the individual a healthy amount of exercise and social interaction (Get into golf 2017). Get into golf also promotes; Golf Express (9 Hole golf) and Girls Golf Rocks (Aimed at girls between 5-18 years of age).



8.2 County Impact Report (1st April – 30th September 2016)

The England Golf County Impact Report (2016) was carried out between 1st April and 30th September 2016. Together with key organisations including the PGA and the Golf Foundation, England Golf and their network of county development officers, carried out the action plan, which is part of England Golf's 2014-2017 strategic plan.

Below are some of the key findings;

Participation and Membership

- 135,125 participants involved in activities.
- Generating 9,248 memberships which is a 26% increase from 2015.
- 55% of these are on a trial or introductory membership.
- 40% taking part are female.
- 30% increase in membership in last two years in England.

Juniors and Young People

- HSBC Golf roots centres, college and schools have introduced 73,306 juniors to golf.
- This resulted in 3,767 new, memberships.
- Nationally, junior boys and girl's membership has increased by 7% and 4% respectively.
- Developed a new partnership with British universities and college sport (BUCS) to promote university golf.

Families

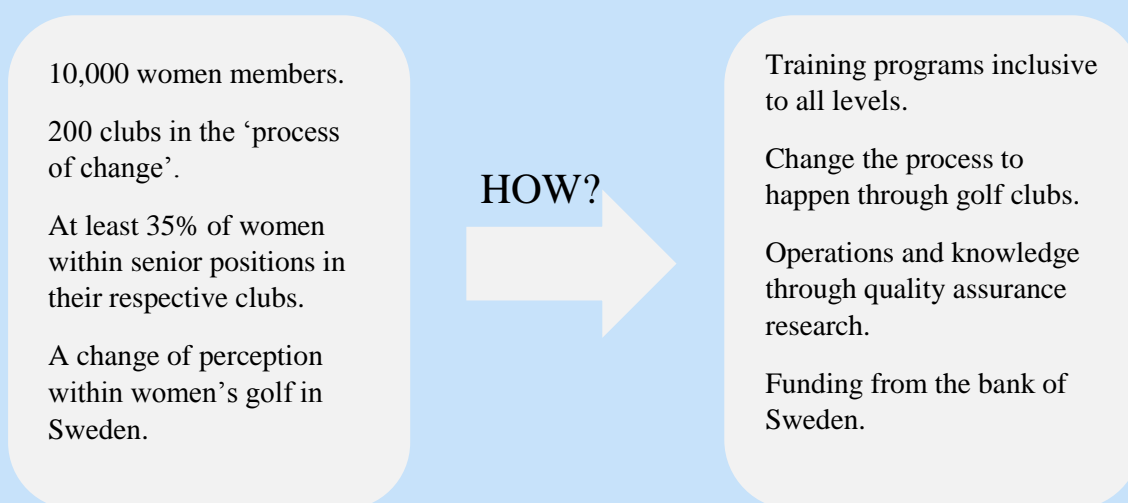
- Clubs are being encouraged to introduce 'Family Open Days'.
- This is being delivered in partnership with Get into Golf.
- 60 clubs reported a total of 7,117 family members playing, with 153 members generated as a result.
- Of the 19% of clubs offering family membership, there has been an increase of 31%.
- Introduction of family friendly facilities including crèches.

Women and Girls

- Enthused by Get into Golf promotion of This Girl Can initiative.
- 175 clubs that introduced 'women specific coaching has attracted 4,386 players, resulting in 958 memberships.
- Girls Golf Rocks has seen participation numbers of 628 resulting in 234 memberships.

8.3 Vision 50/50

Europe are also recognising the importance of initiatives to improve golf club membership and participation. Sweden are currently involved in an initiative called Vision 50/50. Vision 50/50 is a club development program which aims to create equal opportunities for women in sport, especially golf. Despite already having a 28% membership rate, which in a European context is very high, Vision 50/50 attempts to close the gap even further with the following forecasted objectives in place until 2020;



**Svenska
Golfförbundet**

8.4 Vision 50/50 training program

The vision 50/50 training program was launched in May 2017. The training program is developed by the SGF in partnership with other Swedish sporting organisations and is the first training program of its kind. The program aims improve gender equality within golf clubs in Sweden.

The program originated from a pilot study which included 8 clubs, introducing information and support for process of change within the selected golf clubs. Now, the training has space

for about 50 clubs, with the hope of increasing the capacity to 200 clubs by 2020 (Vision 50/50 2017). This initiative will allow women to gain greater importance throughout golf in Sweden and allow them to have more of an impact within their respective golf clubs.

9.0 Results and Analysis

9.1 Questionnaire Observations

The research team made observations with regards to the sample of respondents on each questionnaire which may affect the responses. These can be seen below;

Golf Membership and Participation Questionnaire

- 62.7% Male and 36.6% female.
- Almost 60% were over 27.
- 82.7% British influence.
- 72.3% private golf club members.
- 83.8% actual golf club members.

Non- Golfers Perceptions Questionnaire

- 45.6% Male and 54.4% Female.
- Multinational analysis - British, German, Dutch, Italian around a 25% split.
- Varied age ranges between 16-27-year old's.
- Football and general fitness sports were the most common with over 60%.
- 52.4% currently a club member.

Conclusions

The Golf Club Membership and Participation questionnaire was heavily represented by British responses, thus not giving us a fair representation of Europe. Whereas the Non-Golfers Perceptions questionnaire was answered by 10 different nationalities, giving the research team a very multi-national analysis. Within the Golf Club Membership and Participation questionnaire, the majority were golf club members and members of private members clubs. This could have had a bearing on the results, due to the nature of private members clubs being run by the membership rather than proprietary owned. The Non-Golfer Perceptions questionnaire showed us that there was a varied age range between 16-27-year olds, and only half were currently a club member. This foundation gave the research team the opportunity to analyse the results effectively and will be discussed in depth in the next section.

9.2 Participation

Throughout the report, it has become apparent that participation in the UK is lower than that in other countries across Europe. When examining the questionnaires, the results display that Europeans on average play almost double the amount that British people do on a weekly basis at 3.15 times per week, compared with 1.88 times per week respectively.

The research team identified that it was important to gather the information from discontinued members, to see if their participation in golf had altered. *Figure 6* shows that 44.4% of respondents believe their participation is affected by not being a member.



Figure 6: Do you believe not being a member of a golf club affects your participation? (Golf Membership and Participation Questionnaire)

The respondents were then asked the main reason for not continuing their membership which is shown in *figure 7* below;

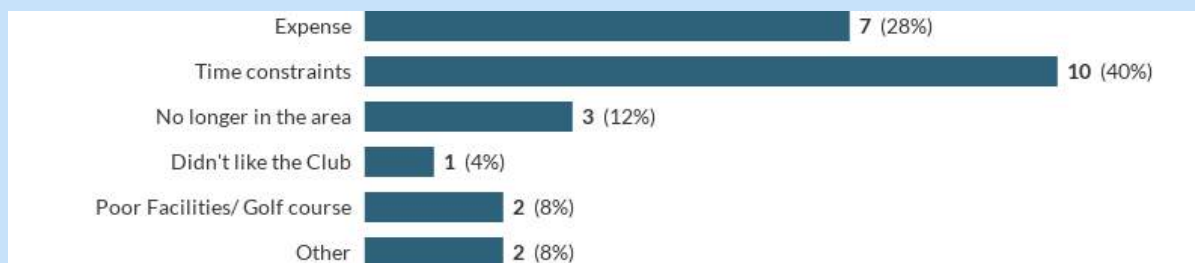


Figure 7: What is the main reason for not continuing your membership? (Golf Membership and Participation Questionnaire)

Finally, discontinued members were then asked if since not renewing membership, has their participation decreased, increased or stayed the same. *Figure 8* shows an obvious decrease in participation since discontinuing their membership.

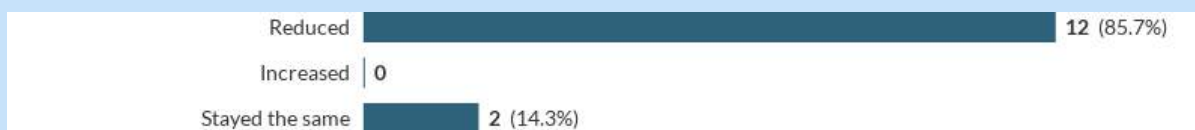


Figure 8: Has your participation increased, decreased or stayed the same since not being a member? (Golf Membership and Participation Questionnaire)

According to Wood and Danylchuk (2011) participation within in golf, especially women's golf, creates a group culture that influences more frequent participation. These results support this research, as they prove not being a member of a golf club, thus part of a group culture, negatively affects participation. Therefore, it is important for local governments and national governing bodies, to promote their initiatives, to try and attract new members. The responses in *figure 7* show that time constraints and expense are the main reasons preventing participation. Golf clubs and local facilities need to market their products to the right audience, introducing cheaper packages for all categories, taster sessions and open days for families. Throughout the UK, clubs are starting to incorporate this change with the inclusion of family areas, crèche's and restaurants, for the family to enjoy.

It has been outlined that shorter formats, taster sessions and open days could be used to increase participation in golf, however those that buy into the concept of golf, still adhere to its traditions. When asking club members how they like to spend their time participating in golf, 58.9% would still prefer to play 18 holes, rather than any other facet of the game. The research team accepted that this is the object of the game and it would be difficult to change the perceptions of traditional golfers. This is reflected by the demographic of the respondents of the club member questionnaire, in which 57.7% were over 27 years old.

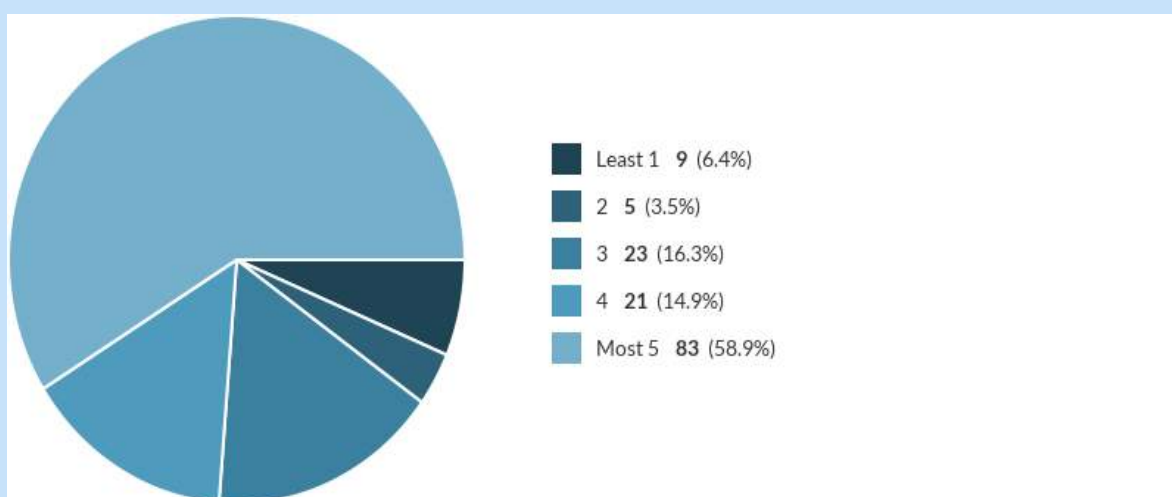


Figure 9: How do you prefer to spend your time participating in golf? (Golf Membership and Perceptions Questionnaire)

Until the age of 60, from the age of 25 it is suggested that the older you get, the less time you have to play due to time constraints and family life. This is one of the biggest problems for the current golf industry and can be difficult to combat. This is backed up by the England Golf Questionnaire in section 3.0. It shows that the membership numbers in England are stagnating through the ages of 22-65 and this is where golf clubs marketing efforts need to be substantial to increase the numbers. Again, taster sessions, open days, academy and flexible memberships are all great ways to get people into the game.

Finally, with participation rates being low in the UK it is essential for golf clubs to adopt the correct initiatives and marketing plans to entice members. Research has already shown initiatives are working across Europe (Vision 50/50), to increase participation which is the first stage of potentially becoming a club member.

9.3 Expense

After analysing the both questionnaires, it is noticeable that golf is perceived to be more expensive than most other sports, with golfers spending on average spend £1,000-£2,000 per year, and non-golfers only spend around £500 per year (*Figure 10*).

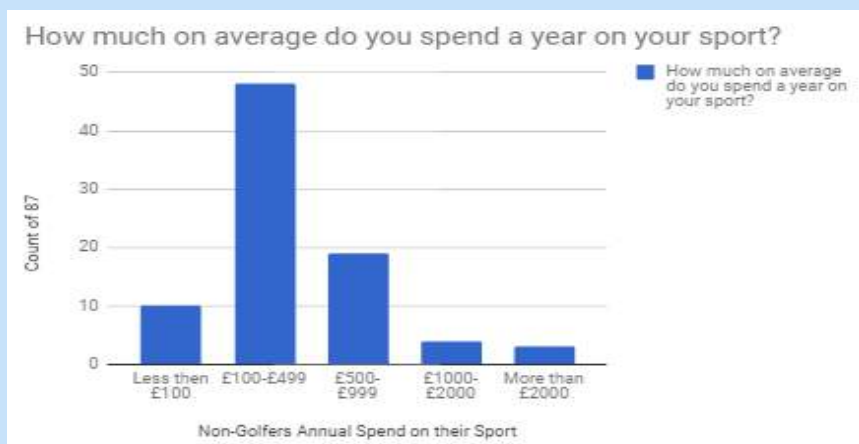


Figure 10: How much on average do you spend on your sport? (Non- Golfers Perceptions Questionnaire)

Golfers were asked if they perceived golf as expensive, from the results in *figure 11*, 56.7% agreed and 17.7% strongly agreed. This is due to the nature of the sport however, it can be combated through different membership categories to make it more affordable.

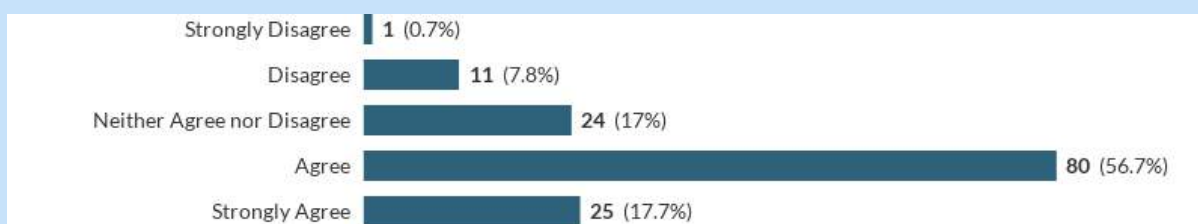


Figure 11: Do you perceive golf to be expensive? (Non- Golfer Perceptions Questionnaire)

With golf membership numbers decreasing over the last few years (Addley 2017) the research team wanted to ask golfers that aren't members their reasoning for not joining a golf club. Again *figure 12* showed expense was a clear factor preventing people taking up membership, closely followed by time constraints.

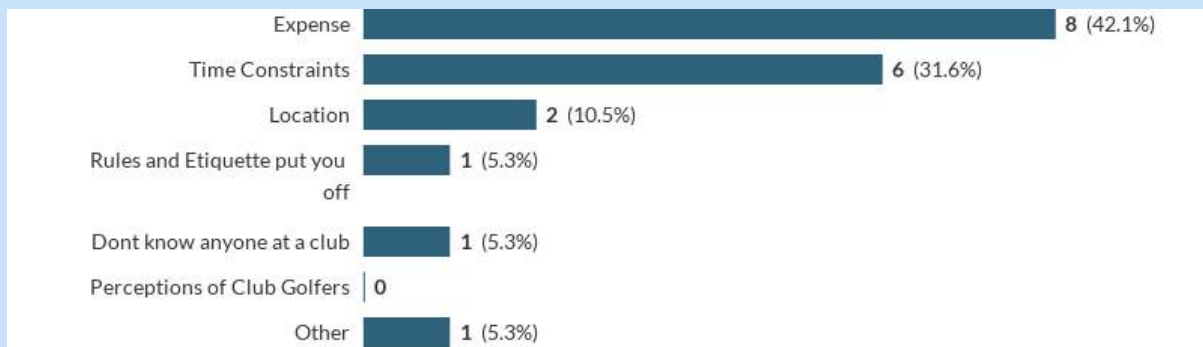


Figure 12: What are the main reasons for not joining a golf club? (Golf Membership and Participation Questionnaire)

In addition, it is important to note that 61.3% of active golfer's state that golf lessons would increase their participation rate. However, only 24.1% of these respondents believed that golf lessons were affordable, preventing people having them and thus reducing their participation. Golf lessons therefore need to be made affordable to entice beginners, increasing participation and ultimately membership.

Finally, the numbers of juniors playing golf was incredibly low, expense is a major factor contributing to this as once a junior membership runs out, the membership price tend to increase dramatically and there is no incentive to carry on being a member. There is a clear correlation between the price of the sport and participation levels (Truttle 2014). Therefore, clubs must adopt a pricing strategy relevant to the current economic climate, to enhance the opportunity firstly for beginners to try the sport, and golfers to move into club membership.

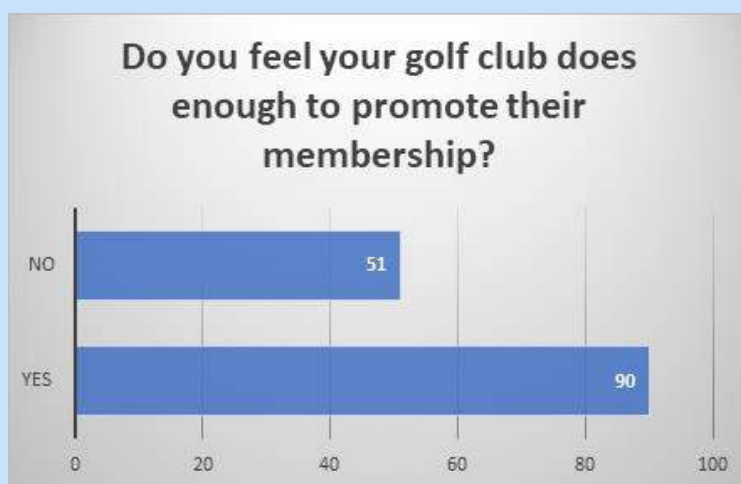
Respondents were asked how they could increase golf club membership and these are some expense related responses.

'Reduce membership rates and make more money through competitions and events. Many people of ages 20-35 struggle to afford the majority of current membership fees, and if changes aren't made many clubs could face serious problems financially in 10-20 years due to lack of membership'

'Create pathways for non-golfers to become golf members through academies. Aim to create time based memberships which are designed for quicker rounds of golf. Will be more appealing for 25-40 age group.'

9.4 Marketing

According to Rasul (2018) one of the most important aspects for the success of any business is relationship marketing, focusing on the interaction between the business and its clients. However, this seems to be an area in which golf clubs are lacking, with many responses from our questionnaire suggesting golf clubs ‘tend to be more proactive than reactive’. This is significant as Garland et al, (2011) suggests that proactive marketing and setting long term goals will improve club performance. This research project highlighted that 51 people out of 142 said they feel their golf club does not do enough to promote their memberships (*Figure 13*). Nevertheless, what is more concerning is that 58.3% of non-golfers said they know where their local golf facilities are, yet aren’t participating, while the other 41.7% do not know where the facilities are or how to get involved. This suggests that not only are golf clubs not marketing themselves enough they are also not marketing or promoting themselves to the correct audience.



*Figure 13: Do you feel your club does enough to promote their membership?
(Golf Membership and Participation Questionnaire)*

Many members in our questionnaire suggested their clubs do not need to market themselves due to their ‘reputation’ and ‘exclusivity’, but when analysing the response of how people got into golf 73.4% said they did so through their friends and family with only 2.6% saying they did so through initiatives (*Figure 14*). This represents the lack of marketing not only from golf clubs deemed to be ‘exclusive’ but all golf clubs.

An in-depth review of the qualitative data that has been collected by the questionnaire reveals that numerous golf club members conceive the marketing approach of their club as ‘unprofessional’ or ‘insufficient’. It can be argued that many clubs do not have a planned marketing operation or solely rely on word of mouth marketing, again this can be seen through *Figure 14*. In various cases golf clubs only market to their own captive audience by limiting their advertising efforts to their own homepage or throughout the golf club, however as previously discussed, if non-golfers aren’t aware of their local golf facilities they aren’t going to see the club’s promotion efforts.

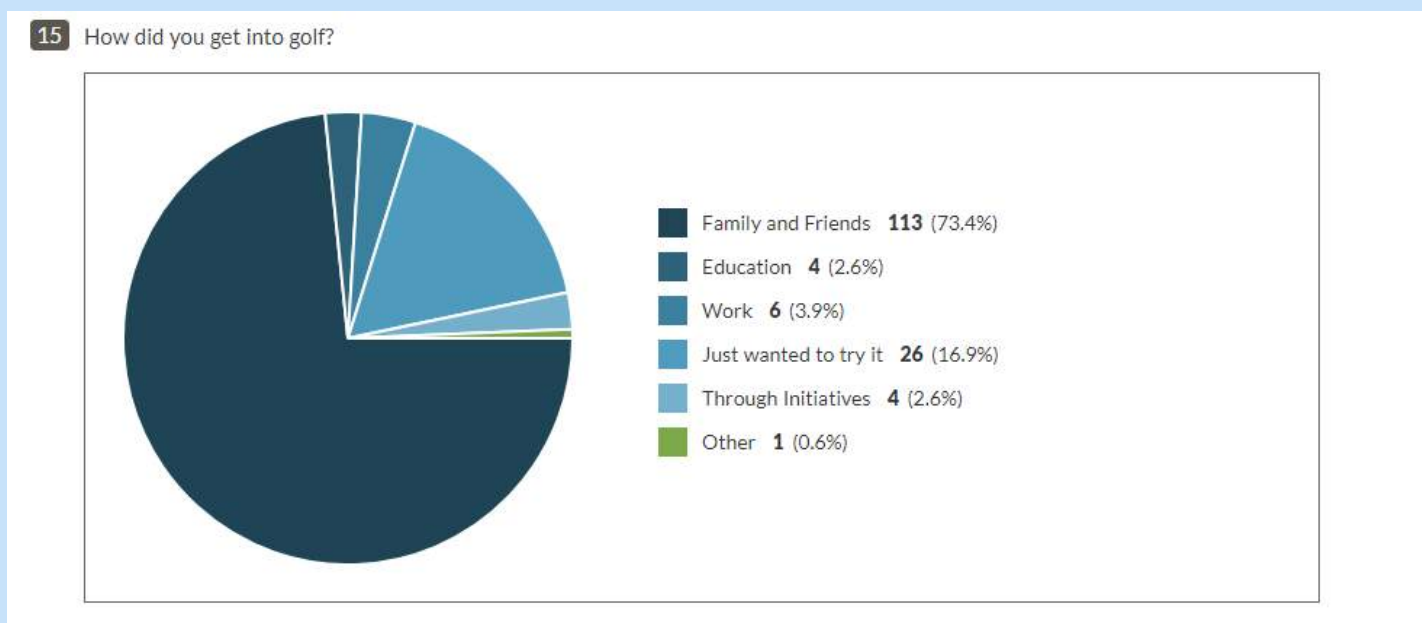


Figure 14: How did you get into Golf? (Golf Membership and Participation Questionnaire)

Table 1 below shows the distribution of importance for non-members when looking for a golf club membership. The research team deemed this question to be appropriate to help golf club managers ensure they are marketing to their club’s strengths.

	Accessibility	Location	Competitions	Membership Categories	Social Section	Expense	Facilities	Golf Course
Strongly Disagree	0	0	0	0	0	0	0	0
Disagree	0	0	0	0	0	0	0	0
Neither Agree or Disagree	1	2	8	6	2	0	3	1
Agree	3	3	0	2	4	4	3	5
Strongly Agree	5	4	0	0	1	5	3	3

Table 1: What is the most important factor when looking for a golf club membership? (Golf Membership and Participation Questionnaire)

The table above has been highlighted based on importance. It is clear to see that most of the non-members strongly agreed that accessibility, location, expense, facilities and the golf course were of high importance when considering a golf club membership. This was an expected response as people do not want to travel over an hour to the nearest golf club and they also want it at an affordable rate. In addition, with the data showing the golf course and facilities being of high importance you can see why some golfers may join a club based on the golf course and exclusivity alone. However, the information which is most advantageous for the research team is emphasis on social section and membership categories. Golf clubs need to be marketing more membership categories to target young people and families at an affordable rate, but also use their facilities to host more social event. This was consistent with the members responses when asked how they feel their golf clubs can improve membership responses were as follows;

‘By being more active and hosting more events at their clubs to attract new members’

‘If more emphasis was placed on marketing and selling the club, I believe the increased awareness would help boost attendance’

Moreover, the results show that competitions aren't a factor when looking for golf club membership, and alone would not necessarily entice new members. Although, they may help combat the time constraint issue which was highlighted in golf participation. In fact, when 46.9% of club members spend most or a considerable amount of their time playing nine holes, thus showing shorter golf formats would be well received (Kovaleski 2004).

In addition, golf lessons were viewed as a valuable marketing tool to increase participation, however as discussed earlier only 24.1% of respondents believed that they were affordable. As well as this, there was a common theme from respondents regarding 'taster sessions', academy membership and flexible membership. Respondents did not feel there was enough opportunity to try golf and gain a feel for a club, which put them off purchasing membership. Beginners want a stepping stone into full membership and academy memberships provide this making them a valuable marketing tool. Also through offering flexible memberships the game becomes more accessible for younger people who struggle with work and family life. It is therefore important for golf clubs to market themselves at an affordable rate with different membership options

‘Open days so people can experience both the golf and social side of the club.’

9.5 Perceptions

Perceptions of golf seem to remain static through these changing times. It was ideal to get the perceptions of both golfers and non-golfers to see if there was any difference between them.

The results showed very similar correlations between the two. With both golfers and non-golfers expressing that golf is still a game that is expensive, time consuming and technical. Interestingly, golfers themselves deemed golf to be traditional, most likely because golfers buy into the fact that golf is a sport heralded for its traditions and the social status of a 'golf club member' is still one that golfers seek to be part of.

Both sets of groups were asked what they perceived golf to be;

Non-Golfers Perceptions

Expensive – 87.4% either agreed or strongly agreed.

Time consuming – 70.6% either agree or strongly agree

Old fashioned - Interesting – even split

Traditional – 58.3% either agree or strongly agree.

Male dominated – 40.2% either agree or strongly agree.

Technical – 75.8% either agree or strongly agree

Accessible - 73.8 % either disagree or neither agree or disagree.

Members and Golfers Perceptions

Expensive - 74.4% agree or strongly agree

Time consuming - 76.1% agree or strongly agree

Old fashioned - 33.8 disagree, 25.9% agree

Traditional - 71.2% agree or strongly agree

Male dominated- 65.7% agree or strongly agree

Technical - 75.8% agree or strongly agree

Accessible - 44.3% agree or strongly agree.

Below are some of the qualitative responses, when respondents were asked how they feel golf clubs can increase golf membership as a whole;

‘Provide greater access to juniors and encourage greater participation and relaxation of dress code - make golf more accessible by reducing traditional and stuffy attitudes within members clubs.’

‘By accepting change is the only constant and dispensing with some of the archaic traditions’

‘Depends on the club and their aims. Private members clubs have different priorities to those owned by companies.’

Similarities exist between both golfers and non-golfer’s perceptions in golf, with time consuming, expensive and technical, being heavily represented throughout the results. Nevertheless, one difference is the male dominated response. This gives value to the European influence within the non-golfer’s questionnaire. As discussed, Europe is heavily involved in the introduction of families, female and junior participation, becoming a more acceptable sport for all to play. On the other hand, the UK market is still heavily male dominated, which is concerning when England is still the market leader across Europe. Incorporating more family focused initiatives is therefore something that the UK should address further. However, when broadening the view to the wider golfing audience the initiatives for females and juniors in place are starting to change the perceptions surrounding golf. Perhaps the lack of knowledge from non-golfers has an impact on their perceptions and this is something that in the future needs to change. This impact will not have immediate benefits; although, the change will be beneficial to the golf industry.

10.0 Recommendations

Based on the primary and secondary research carried out by the research team, the following recommendations have been made to increase golf participation and ultimately progress golfers into club membership.

Secondary research showed that the UK has the higher number of registered golfers but the lowest participation rates, whereas countries in Europe, such as Sweden had high participation rates and a lower number of registered golfers. This difference in participation levels is believed to be due to the lack of female and junior golfers in the UK, whereas in Europe initiatives including vision 50/50 are helping combat this problem. This was therefore an area identified in which the UK and other European countries need to focus on to enhance participation.

The two case studies identified how shorter formats are being introduced into other sports. This was deemed a major area in which golf clubs need to progress. It was established that shorter formats may not increase membership, however with 46.9% of members regularly participating in nine holes it is a good way to combat the time constraint issues facing younger working people. Expense was also a major factor affecting membership, both non-golfers and golfers perceived golf as an expensive sport and golfers spent almost double than what non-golfers do on their sport. Therefore, with the limited time available people can't warrant spending money on a full membership when they can only play a limited number of times, therefore the availability of flexible membership would help make it more affordable and a worthwhile investment. It also became apparent that golf lessons need to be made more affordable to entice beginners, only 24.1% of respondents believe golf lessons were affordable. Therefore, the price of golf lessons needs to reduce, yet there also needs to be a clear route for a beginner to continue their lessons to progress them further into membership. This is where academy memberships will be useful making it more affordable for beginners.

In addition, 73.4% of golfers got into the game through their family and friends, this is therefore a major factor to look at when trying to attract new members. Although it shows golf clubs are reliant on word of mouth rather than marketing, they should be using this as a strength through using existing members as ambassadors for their membership. This could be achieved through the introduction of

rewards for any referrals that an existing member makes to introduce new members into the club.

Moreover, it appeared that increased marketing of social events and taster sessions would be a good way to raise awareness. This will also offer clubs an opportunity to enhance their relationship marketing through open days, whereby prospective members details can be taken, and social media platforms can be used to send information regarding social events and memberships.

In conclusion, the golf industry has seen progress due to strategic plans from various organisations across Europe. Further research should focus on female and junior participation across the UK and increasing the number of registered golfers across Europe. It is clear to see that the strategic plans are having an impact, however, change in such a traditional game, can be a slow process. Golf clubs must look at embracing a wider audience and operate more as a business to combat the participation rates and membership decline.

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12.0 Appendices

APPENDIX A: KPMG European Statistics between registered golfers and participation rates.

KPMG Survey: Country Statistics

Registered golfers and standard golf courses in Europe, 2015-2016

Country	Registered golfers 2016	Registered golfers 2015	% Change 2015 vs. 2016	Status ¹	Change in the number of golfers 2015 vs. 2016	Participation rate 2016	Golf courses 2016	Golf courses 2015	% Change 2015 vs. 2016	Change in the number of golf courses 2015 vs. 2016	Golfers per golf course 2016	Population per golf course 2016
England	694,823	665,103	4.44%	↑	29,520	1.27%	1,907	1,923	-1%	-16	364	28,729
Germany	643,158	640,181	0.47%	-	2,977	0.79%	732	727	1%	5	879	111,886
Sweden	463,952	455,770	1.80%	↑	8,182	4.71%	444	445	0%	-1	1,045	22,185
France	407,719	407,569	0.04%	-	150	0.63%	600	599	0%	1	680	108,167
Netherlands	400,510	382,232	4.78%	↑	18,278	2.37%	250	248	1%	2	1,602	67,603
Spain	271,805	276,318	-1.61%	↓	-4,453	0.58%	349	351	-1%	-2	876	133,238
Scotland	192,533	199,244	-3.37%	↓	-6,711	3.56%	578	597	-3%	-19	333	9,351
Ireland	190,883	192,507	-0.84%	-	-1,624	4.01%	410	414	-1%	-4	466	11,605
Denmark	151,139	150,916	0.15%	-	223	2.65%	190	190	0%	0	795	30,038
Finland	143,025	143,182	-0.11%	-	-157	2.61%	129	129	0%	0	1,109	42,439
Norway	100,702	101,349	-0.64%	-	-647	1.93%	152	152	0%	0	663	34,303
Austria	100,351	101,480	-1.11%	↓	-1,129	1.17%	160	157	2%	3	627	53,400
Switzerland	90,725	89,579	1.28%	↑	1,146	1.08%	96	96	0%	0	945	87,684
Italy	90,259	90,027	0.26%	-	232	0.15%	241	238	1%	3	375	248,133
Belgium	62,632	62,606	0.04%	-	26	0.56%	76	77	-1%	-1	824	148,262
Czech Republic	54,318	50,352	-3.61%	↓	-2,034	0.52%	106	104	2%	2	512	99,057
Wales	45,422	46,980	-3.32%	↓	-1,558	1.47%	149	150	-1%	-1	305	20,799
Iceland	16,823	16,437	2.35%	↑	386	4.97%	61	63	-3%	-2	276	5,547
Portugal	14,659	13,848	5.96%	↑	811	0.14%	87	82	6%	5	168	119,886
Slovakia	10,600	8,461	25.28%	↑	2,139	0.20%	29	28	4%	1	366	187,112
Slovenia ²	8,762	5,891	48.74%	↑	2,871	0.43%	13	13	0%	0	674	158,462
Turkey	7,083	6,829	3.72%	↑	254	0.01%	18	19	-5%	-1	394	4,434,160
Poland	4,705	4,015	17.19%	↑	690	0.01%	37	37	0%	0	127	1,035,135
Luxembourg	3,475	3,308	5.05%	↑	167	0.62%	5	5	0%	0	695	112,600
Estonia ²	2,889	2,610	2.81%	↑	279	0.22%	10	10	0%	0	289	131,000
Russia	1,947	1,667	16.80%	↑	280	0.00% ¹	26	29	-10%	-3	75	5,646,154
Greece	1,514	1,830	-17.27%	↓	-316	0.01%	8	8	0%	0	189	1,348,750
Cyprus	1,402	1,559	-10.07%	↓	-157	0.16%	9	9	0%	0	156	95,333
Croatia ²	1,380	1,420	-2.82%	↓	-40	0.03%	5	5	0%	0	276	846,000
Hungary	1,095	998	9.72%	↑	97	0.01%	14	14	0%	0	276	846,000
Latvia ²	1,004	965	4.04%	↑	39	0.05%	6	6	0%	0	167	328,333
Bulgaria	920	847	8.62%	↑	73	0.01%	7	7	0%	0	131	1,051,429
Liechtenstein	809	723	11.89%	↑	86	2.13%	0	0	0%	0	0	37,998
Lithuania	801	761	5.26%	↑	40	0.03%	5	5	0%	0	160	640,000
Serbia	747	740	0.95%	-	7	0.01%	2	3	-33%	-1	374	3,550,000
Ukraine	593	547	8.41%	↑	46	0.00% ¹	4	5	-20%	-1	148	11,312,500
Malta	546	546	0.00%	-	0	0.13%	1	1	0%	0	546	429,344
Armenia	130	75	73.33%	↑	55	0.00% ¹	1	1	0%	0	130	3,000,000
Macedonia ²	119	119	0.00%	-	0	0.01%	1	0	0%	1	119	2,078,000
Azerbaijan ²	104	104	0.00%	-	0	0.00% ¹	2	2	0%	0	52	4,850,000
Andorra ²	79	79	0.00%	-	0	0.11%	2	1	100%	1	40	36,101
Albania ²	64	64	0.00%	-	0	0.00% ¹	1	1	0	0	64	2,886,026
Georgia ²	50	50	0.00%	-	0	0.00% ¹	1	1	0	0	50	4,000,000
Total	4,186,116	4,136,784	1.19%	=	50,028	0.92%	6,924	6,952	-0.40%	-28		

APPENDIX B: Golf Club Membership and Participation Questionnaire



Golf club membership and Participation

Information

For Parents (Children under the age of 18):

For children under the age of 18 we seek your permission for your child to participate in our research. On behalf of the Club Managers Association of Europe (CMAE), we are conducting a consultancy project tasked with exploring key initiatives that are helping participation and golf club membership throughout the United Kingdom and Europe. Our Study focuses on years 16 and upwards and all of the data collected will be shared with the CMAE.

The responses will be strictly confidential and will be stored on a password protected device. All of the responses will be anonymous and there will be no repercussions with your child's golf. If assisting your child with the research, we please request that you do not influence their responses.

Thank you.

For the Participant.

Purpose of the project

On behalf of the CMAE, we are conducting a consultancy project tasked with exploring key initiatives that are helping participation and club membership throughout the United Kingdom and Europe. The project will last until 31st January 2018.

Why do we need your help?

You have been asked to take part in this research project because you are either a club member, a golfer or a non-golfer. Through answering our questionnaire, you will help us understand the barriers preventing golfers and non-golfers taking up club membership.

Do I have to take part?

It is up to you to decide whether or not to take part and your participation is completely voluntary. If you do decide to take part, you can withdraw at any time, up to the point of where you have submitted the questionnaire. If you do decide to withdraw, please do so by closing the browser. Once you have submitted the questionnaire, results become completely anonymous, therefore we cannot delete your data.

What would taking part involve?

Taking part in this research project will only require you to fill out the questionnaire(s) designed by us the research team. As stated previously, you have the right to withdraw at any time.

Contact for further information

This study conforms to Bournemouth University regulations for ethical research. If you have any queries regarding this study, you can contact a University representative of which the details are below;

Dr Andy Callaway,

Dept. of Sport and Physical Activity,

Bournemouth University,

Fern Barrow, Poole,

BH12 5BB,

01202 961255

acallaway@bournemouth.ac.uk

Thank you for reading this information sheet and considering taking part in this research project.

To start the survey, please click the "next" button below

Page 1- About You

1. What gender are you?

☐ Male

☐ Female

☐ Rather not say

2. How old are you? * *Required*

3. What nationality are you?

3.a. If you selected Other, please specify:

Page 2 - Membership

4. Are you a member of a golf club? * *Required*

☐ Yes

☐ No

☐ Not anymore

Page 3 - About Your Golf Club

5. Is your golf club a private members club?

- ☐ Yes
☐ No
☐ Unsure

6. What membership category are you in?

6.a. If you selected Other, please specify:

7. What attracted you to your current golf club?

Please don't select more than 1 answer(s) per row.

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
The Golf Course	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Location	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Competitions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Membership Categories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expense	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6 / 20

Social Section	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Networking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer Service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8. What you feel your club could benefit from the most?

Please don't select more than 1 answer(s) per row.

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
Improved Golf Course	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Increased Social activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
More membership categories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Flexibility with competitions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Better customer service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Relaxing old traditions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9. Do you feel your golf club is doing enough to attract new members?

- ☐ Yes
- ☐ No

9.a. Please explain your answer

10. Do you pay your own membership? * *Required*

- ☐ Yes
- ☐ No
- ☐ Other

10.a. If you selected Other, please specify:

Page 4 - Non Club Members

11. What is your main reason for not joining a golf club?

- ☐ Expense
- ☐ Time Constraints
- ☐ Location
- ☐ Rules and Etiquette put you off
- ☐ Dont know anyone at a club
- ☐ Perceptions of Club Golfers
- ☐ Other

11.a. If you selected Other, please specify:

11.b. What are the most important factors for you when looking for golf club membership?

Please don't select more than 1 answer(s) per row.

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
Accessibility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Location	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Competitions (Weekend and Weekday)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Membership categories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social Section	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expense	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The golf course



12. Do you believe not being a member of a club affects your participation in the game?

- ☐ Yes
- ☐ No
- ☐ Maybe

Page 5 - Used to be a Club Member

13. What is the main reason for not continuing your membership?

- ☐ Expense
- ☐ Time constraints
- ☐ No longer in the area
- ☐ Didn't like the Club
- ☐ Poor Facilities/ Golf course
- ☐ Other

13.a. If you selected Other, please specify:

14. Since not renewing your membership has your participation in golf reduced, increased or stayed the same?

- ☐ Reduced
- ☐ Increased
- ☐ Stayed the same

Page 6 - Golf Participation

15. How did you get into golf?

Please select at least 1 answer(s).

- ☐ Family and Friends
- ☐ Education
- ☐ Work
- ☐ Just wanted to try it
- ☐ Through Initiatives
- ☐ Other

15.a. If you selected Other, please specify:

16. How often on average do you play golf?

- ☐ Everyday
- ☐ 4-5 times a week
- ☐ 2-3 times a week
- ☐ Once a week
- ☐ Every two weeks
- ☐ Once a month

16.a. When in the week do you tend to play your golf?

- ☐ Weekdays
- ☐ Weekends

12 / 20

☐ Anytime

17. How do you get to golf?

- ☐ Parents/ Guardians take you
- ☐ Drive yourself
- ☐ Public transport
- ☐ Walk
- ☐ Other

17.a. If you selected Other, please specify:

18. Do you have a Handicap?

- ☐ Yes
- ☐ No

18.a. If yes, what is your handicap?

19. How do you like to spend your time participating in golf?

Please don't select more than 1 answer(s) per row.

	Least 1	2	3	4	Most 5
Driving Range	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18 holes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9 holes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Short Game	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

20. How much on average a year do you spend on golf?

- ☐ Less than £100
- ☐ £100- £499
- ☐ £500- £999
- ☐ £1000- £2000
- ☐ More than £2000

Page 6 - Coaching

21. Have you ever had golf lessons?

- ☐ Yes
- ☐ No

21.a. If yes to the above, do you prefer to have lessons;

- ☐ In a group
- ☐ One to one
- ☐ With a friend
- ☐ Other

21.a.i. If you selected Other, please specify:

22. Do you feel regular golf lessons would increase your participation in golf?

- ☐ Yes
- ☐ No

23. Are golf lessons in your opinion;

- ☐ Too expensive
- ☐ Affordable
- ☐ Accessible

- ☐ Difficult to find
- ☐ Intimidating
- ☐ Useful

Page 7 - Perceptions of Golf

24. How do you perceive golf as a sport?

Please don't select more than 1 answer(s) per row.

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
Time Consuming	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expensive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Old fashioned	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Traditional	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Male Dominated	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Technical	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hard to learn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accessible	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Page 8

25. Do you feel golf clubs offer enough membership categories?

- ☐ Yes
- ☐ No

26. Do you feel golf clubs do enough to promote their memberships?

- ☐ Yes
- ☐ No

26.a. If no to the above, please explain

27. In your opinion how do you feel golf clubs can increase golf club memberships?

Thank you for completing the survey

Key for selection options

2 - How old are you?

16
17
18
19
20
21
22
23
24
25
26
27+

3 - What nationality are you?

British
Italian
Spanish
German
French
Dutch
Other

6 - What membership category are you in?

Full member
Senior
Intermediate
Junior
Country
Overseas
Student
Cooperate
Other

APPENDIX C: Non-Golfers Perception Questionnaire



Non Golfers Perceptions

Page 1: Information

For Parents (Children under the age of 18):

For children under the age of 18 we seek your permission for your child to participate in our research. On behalf of the Club Managers Association of Europe (CMAE), we are conducting a consultancy project tasked with exploring key initiatives that are helping participation and golf club membership throughout the United Kingdom and Europe. Our Study focuses on years 16 and upwards and all of the data collected will be shared with the CMAE.

The responses will be strictly confidential and will be stored on a password protected device. All of the responses will be anonymous and there will be no repercussions with your child's golf. If assisting your child with the research, we please request that you do not influence their responses.

Thank you.

For the Participant.

Purpose of the project

On behalf of the CMAE, we are conducting a consultancy project tasked with exploring key initiatives that are helping participation and club membership throughout the United

Kingdom and Europe. The project will last until 31st January 2018.

Why do we need your help?

You have been asked to take part in this research project because you are either a club member, a golfer or a non-golfer. Through answering our questionnaire, you will help us understand the barriers preventing golfers and non-golfers taking up club membership.

Do I have to take part?

It is up to you to decide whether or not to take part and your participation is completely voluntary. If you do decide to take part, you can withdraw at any time, up to the point of where you have submitted the questionnaire. If you do decide to withdraw, please do so by closing the browser. Once you have submitted the questionnaire, results become completely anonymous, therefore we cannot delete your data.

What would taking part involve?

Taking part in this research project will only require you to fill out the questionnaire(s) designed by us the research team. As stated previously, you have the right to withdraw at any time.

Contact for further information

This study conforms to Bournemouth University regulations for ethical research. If you have any queries regarding this study, you can contact a University representative of which the details are below;

Dr Andy Callaway,

Dept. of Sport and Physical Activity,

Bournemouth University,

Fern Barrow, Poole,

BH12 5BB,

01202 961255

acallaway@bournemouth.ac.uk

Thank you for reading this information sheet and considering taking part in this research project.

Page 2: Page 1- About you

1. What gender are you?

- ☐ Male
- ☐ Female
- ☐ Rather not say

2. How old are you?

- ☐ 16
- ☐ 17
- ☐ 18
- ☐ 19
- ☐ 20
- ☐ 21
- ☐ 22
- ☐ 23
- ☐ 24
- ☐ 25
- ☐ 26
- ☐ 27+

3. What nationality are you?

3.a. If you selected Other, please specify:

...

Page 3: Page 2 - Sports participation

4. Do you participate in a sport regularly?

- ☐ Yes
- ☐ No

4.a. If yes to the above, what is it?

- ☐ Football
- ☐ Rugby
- ☐ Netball
- ☐ Hockey
- ☐ Swimming
- ☐ Basketball
- ☐ Lacrosse
- ☐ Cricket
- ☐ Tennis
- ☐ Other

4.a.i. If you selected Other, please specify:

5. How did you get into your sport?

- ☐ Family and Friends
- ☐ Education
- ☐ Work
- ☐ Something you've always wanted to try

☐ Other

5.a. If you selected Other, please specify:

6. Are you currently a club member?

☐ Yes

☐ No

6.a. If yes to the above, what is your club doing to attract new members?

7. What attracted you to your sport?

Please don't select more than 1 answer(s) per row.

	Least 1	2	3	4	Most 5
Affordability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Physical Activity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social Aspect	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8. How much on average do you spend a year on your sport?

- ☐ Less than £100
- ☐ £100-£499
- ☐ £500- £999
- ☐ £1000- £2000
- ☐ More than £2000

Page 4: Page 3 - Perceptions of golf

9. Would you ever consider playing golf?

- ☐ Yes
☐ No

10. How do you perceive Golf as a sport?

Please don't select more than 1 answer(s) per row.

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
Expensive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accessible	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Technical	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Time Consuming	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Old Fashioned	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Male Dominated	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Traditional	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

11. Why do you not play golf?

- ☐ Too Expensive
☐ Time Consuming
☐ Too difficult to learn
☐ Lack of availability
☐ Too old fashioned
☐ Other

11.a. If you selected Other, please specify:

12. Are you aware of local golf facilities?

- ☐ Yes
☐ No

Page 5: Thank you for completing the survey

Key for selection options

3 - What nationality are you?

British
Italian
French
German
Spanish
Dutch
Other

APPENDIX D: Responses for 'other' on Non-golfers Questionnaire

If you selected other, please specify:


Showing all 59 responses Show less	
Fishing	308472-308464-26864990 View detail for response 308472-308464-26864990
Badminton	308472-308464-26879779 View detail for response 308472-308464-26879779
Athletics	308472-308464-26895277 View detail for response 308472-308464-26895277
Icehockey	308472-308464-26997551 View detail for response 308472-308464-26997551
Muaï-thai (thaiboxing)	308472-308464-26997648 View detail for response 308472-308464-26997648
Fitness training	308472-308464-26997715 View detail for response 308472-308464-26997715
Climbing	308472-308464-26997947 View detail for response 308472-308464-26997947
Track and Field	308472-308464-26997803 View detail for response 308472-308464-26997803
Badminton, Snowboarding, Hiking	308472-308464-26998145 View detail for response 308472-308464-26998145
Zumba, Yoga	308472-308464-26998878 View detail for response 308472-308464-26998878
Badminton	308472-308464-26999002 View detail for response 308472-308464-26999002
Equestrian sports	308472-308464-26998974 View detail for response 308472-308464-26998974
Cycling running gym	308472-308464-26999187 View detail for response 308472-308464-26999187
Gymnastics	308472-308464-26999754 View detail for response 308472-308464-26999754
Gymnastics	308472-308464-27003085 View detail for response 308472-308464-27003085
Skiing, Running, Fitness	308472-308464-27008357 View detail for response 308472-308464-27008357
Golf	308472-308464-27011244 View detail for response 308472-308464-27011244
Squash	308472-308464-27004122 View detail for response 308472-308464-27004122
Track and Field	308472-308464-27012801 View detail for response 308472-308464-27012801
Badminton	308472-308464-27012887 View detail for response 308472-308464-27012887
Volleyball	308472-308464-27014545 View detail for response 308472-308464-27014545
Golf	308472-308464-27016155 View detail for response 308472-308464-27016155

CONSULTANCY FOR SPORT

Showing all 59 responses Show less	
General Fitness	308472-308464-27016628 View detail for response 308472-308464-27016628
Badminton	308472-308464-27018060 View detail for response 308472-308464-27018060
Fitness	308472-308464-27018330 View detail for response 308472-308464-27018330
Kitesurfing	308472-308464-27020640 View detail for response 308472-308464-27020640
Running	308472-308464-27027968 View detail for response 308472-308464-27027968
Running	308472-308464-27029529 View detail for response 308472-308464-27029529
climbing	308472-308464-27030680 View detail for response 308472-308464-27030680
Fitness	308472-308464-27033191 View detail for response 308472-308464-27033191
Golf	308472-308464-27033884 View detail for response 308472-308464-27033884
Fitness	308472-308464-27034817 View detail for response 308472-308464-27034817
Running	308472-308464-27038698 View detail for response 308472-308464-27038698
Golf	308472-308464-27043145 View detail for response 308472-308464-27043145
archery	308472-308464-27046280 View detail for response 308472-308464-27046280
GYM	308472-308464-27055065 View detail for response 308472-308464-27055065
gym, running, skiing	308472-308464-27055251 View detail for response 308472-308464-27055251
Fitness	308472-308464-27055394 View detail for response 308472-308464-27055394
Soccer	308472-308464-27056747 View detail for response 308472-308464-27056747
Running	308472-308464-27066602 View detail for response 308472-308464-27066602
ski	308472-308464-27065837 View detail for response 308472-308464-27065837
Water Ski	308472-308464-27067008 View detail for response 308472-308464-27067008
Crossfit	308472-308464-27071171 View detail for response 308472-308464-27071171
baseball	308472-308464-27071676 View detail for response 308472-308464-27071676
Bouldering	308472-308464-27078322 View detail for response 308472-308464-27078322
Cross-Fit	308472-308464-27117224 View detail for response 308472-308464-27117224
Fitness	308472-308464-27117321 View detail for response 308472-308464-27117321
fitness	308472-308464-27117330 View detail for response 308472-308464-27117330
Cycling	308472-308464-27117705 View detail for response 308472-308464-27117705

Showing all 59 responses Show less	
Yoga	308472-308464-27120084 View detail for response08472-308464-27120084
running	308472-308464-27120227 View detail for response 308472-308464-27120227
Running	308472-308464-27142740 View detail for response 308472-308464-27142740
fitness	308472-308464-27142751 View detail for response 308472-308464-27142751
gym membership	308472-308464-27212555 View detail for response 308472-308464-27212555
Waterskiing	308472-308464-27309274 View detail for response 308472-308464-27309274
volleyball	308472-308464-27470666 View detail for response 308472-308464-27470666
Gym	308472-308464-27480222 View detail for response 308472-308464-27480222
Fitness	308472-308464-27812274 View detail for response 308472-308464-27812274
Ski	308472-308464-27812329

APPENDIX E: BOS Instructions to create and distribute a pilot study.



powerful, flexible online surveys




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Piloting your survey

The best way to check a survey before its official launch is to pilot a full version of it. This 'dry run' of your survey allows you to test all of its features, including data capture and reporting. It also means reviewers can test your survey without needing access to a BOS account.

To pilot your survey:

1. Locate your draft survey on the **Dashboard**  and click on **Distribute**.
2. Go to  **Distribution settings** in the left-hand menu.
3. Set the opening date/time to the current date and time and [retitle the survey](#), for example, "PILOT: (Survey name)".
4. Click **Save**.
5. Set up [survey access control](#), if required.
6. Go to the  **Survey launchpad** and click **Launch survey**.
7. Share the URL with your reviewers.