

Survey for Golfers & Non-Golfers

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5th Golf Innovation Symposium

USGA[®]



Survey Summary

Survey Method

Internet consumer survey. The survey was conducted using Rakuten Insight's registration monitor and survey system. The aggregation and analysis was conducted by the Yano Research Institute (for both the golfer survey and non-golfer survey)

Golfer Survey

- Survey target: Consumers enjoying “golf (including practice courses, ranges)” as a regular hobby
- Number of people surveyed (n number): 2,000 (1,680 men, 320 women)

Non-Golfer Survey

- Survey target: Inexperienced golfers and inactive people (people who used to play golf but no longer do)
- Number of people surveyed (n number): 5,000 (2,806 men, 2,194 women)

Survey for Golfers & Non-Golfers

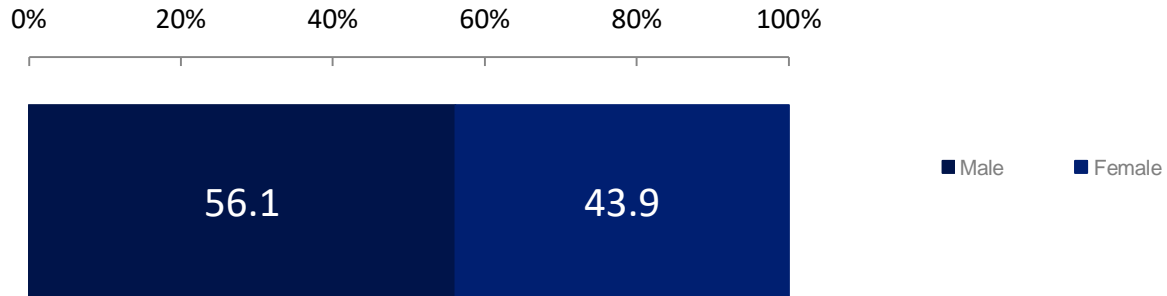
I . Non-Golfer Survey



Respondent's Attributes

– Gender –

	n	%
Overall	5000	100.0
Male	2806	56.1
Female	2194	43.9



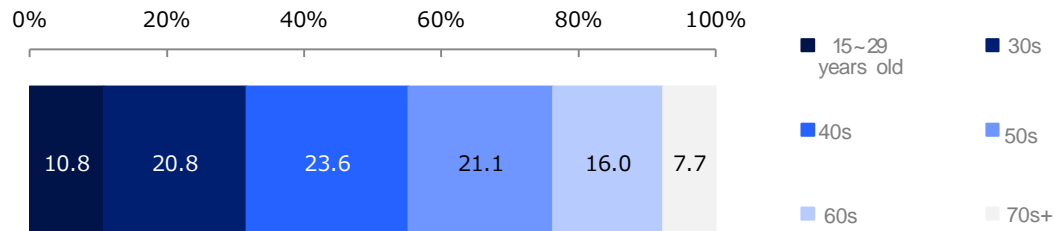
Respondent's Attributes

– By Gender (Men/Women Total) –

	n	%
Overall	5000	100.0
15-29 years old	540	10.8
30s	1039	20.8
40s	1182	23.6
50s	1053	21.1
60s	801	16.0
>70s	385	7.7



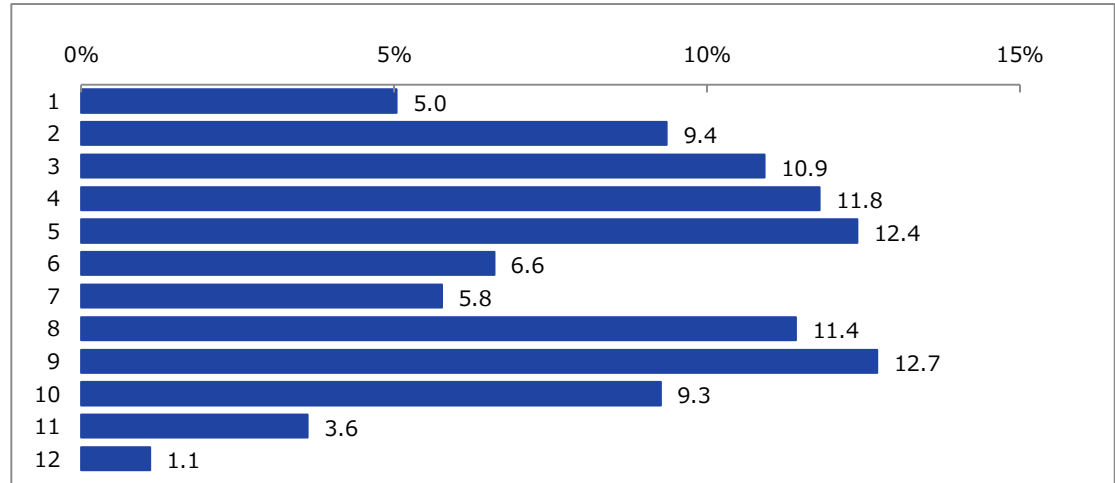
Average: 47.87 years old



Respondent's Attributes

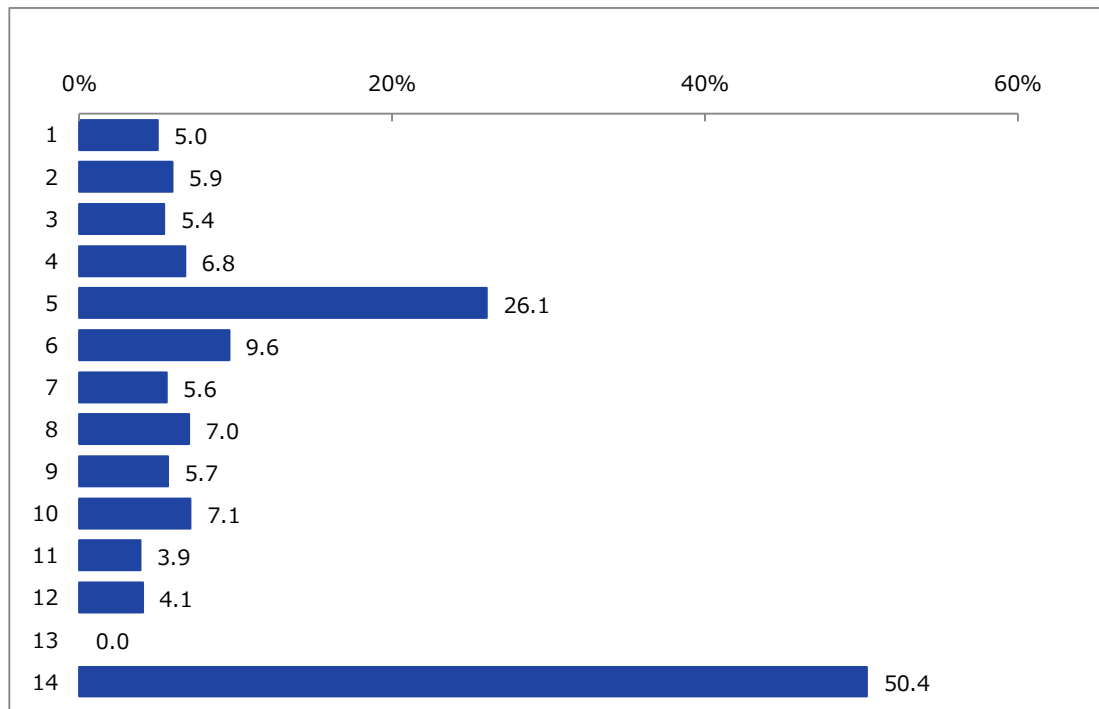
— By Gender & Age —

	n	%
Overall	5000	100.0
1 Males (15~29 years old)	252	5.0
2 Males (30s)	468	9.4
3 Males (40s)	546	10.9
4 Males (50s)	590	11.8
5 Males (60s)	620	12.4
6 Males (70s+)	330	6.6
7 Female (15~29 years old)	288	5.8
8 Female (30s)	571	11.4
9 Female (40s)	636	12.7
10 Female (50s)	463	9.3
11 Female (60s)	181	3.6
12 Female (70s+)	55	1.1



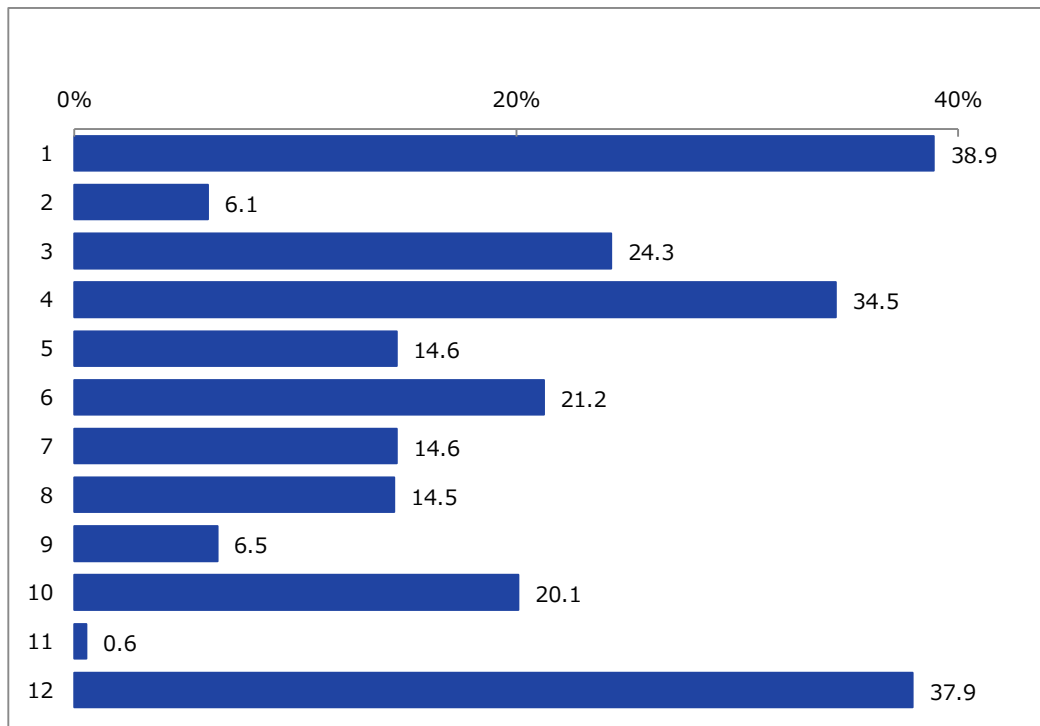
Hobbies (other than golf)

	n	%
Overall	5000	100.0
1 Tennis	250	5.0
2 Gardening	297	5.9
3 Yoga	272	5.4
4 Fitness	338	6.8
5 Walking	1303	26.1
6 Running/jogging	479	9.6
7 Skiing/snowboarding	279	5.6
8 Cycling	351	7.0
9 Fishing	284	5.7
10 Mountain climbing/hiking	356	7.1
11 Camping	195	3.9
12 Swimming	203	4.1
13 Golf (including practice courses, ranges)	0	0.0
14 None of the above	2518	50.4



Level of golf experience

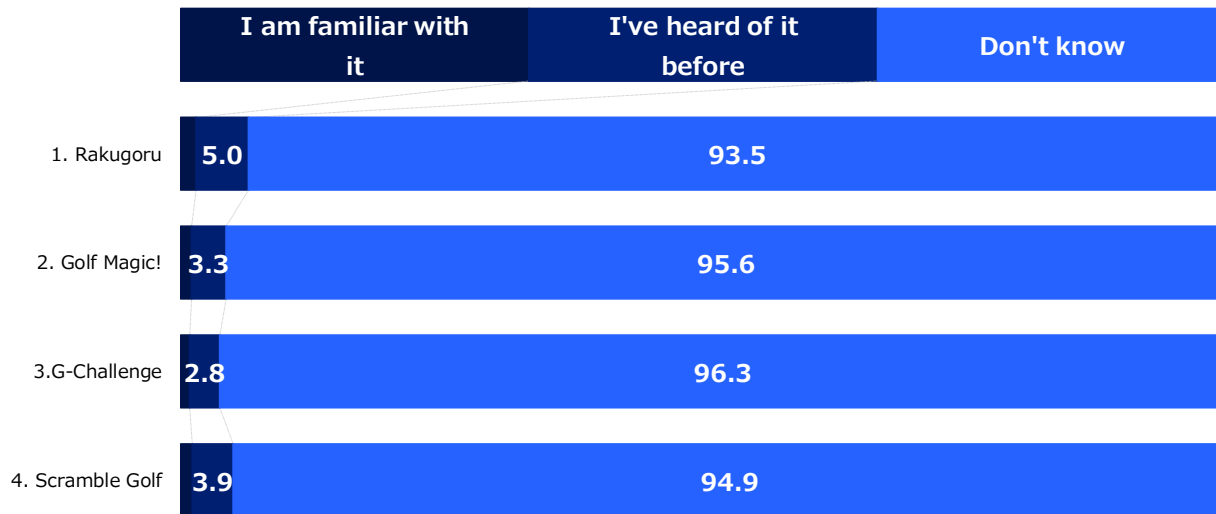
	n	%
Overall	5000	100.0
1 I've watched a golf tournament on TV or the internet	1945	38.9
2 I've been to a golf tournament venue before	303	6.1
3 I've been to a golf course before	1215	24.3
4 I've been to a practice range before	1723	34.5
5 A family member plays golf	729	14.6
6 My friends play golf	1062	21.2
7 My colleague at work plays golf	730	14.6
8 My superior at work plays golf	724	14.5
9 My subordinate at work plays golf	324	6.5
10 I have been invited by someone to play golf before	1005	20.1
11 Other - please specify:	28	0.6
12 None of the above	1897	37.9



Awareness about services & various playing styles

Q7. Are you aware of the following services related to golf plays?

	n	I'm aware of the contents	I've heard of it before	Don't know
1. Rakugoru	5000 100.0	75 1.5	250 5.0	4675 93.5
2. Golf Magic!	5000 100.0	52 1.0	166 3.3	4782 95.6
3. G-Challenge	5000 100.0	45 0.9	142 2.8	4813 96.3
4. Scramble golf	5000 100.0	56 1.1	197 3.9	4747 94.9

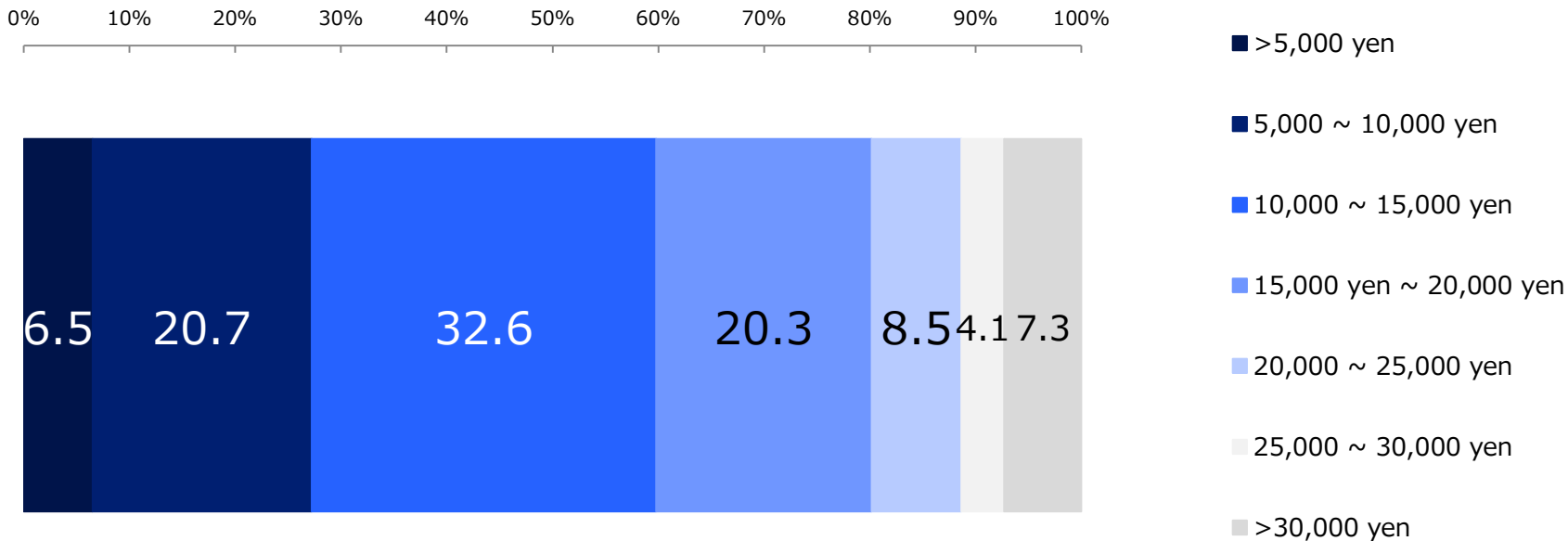


Reasons people don't play golf (TOP 5)

1. Golf gear seem pricey
2. Seems expensive to play
3. Seems time-consuming to play
4. Seems time-consuming to get good at
5. I have other hobbies

The “consensus” on the price of golf

What is the social consensus on how much it costs to play a round of golf?



Important aspects for enjoying sports and leisure activities

- 1. Cost (being able to play affordably)**
- 2. It's good for your health**
- 3. Being able to enjoy even at old age**
- 4. Being able to have a relaxing time**
- 5. Close to my home**

Potential demand

	n	%
Overall	5000	100.0
I've never played golf before, but if I had the opportunity, I would be open to start playing	856	17.1
I used to play golf (not any more), and I am open to starting again if I had the chance	661	13.2
I've played golf before, but don't anymore, and I don't plan on starting again	917	18.3
I've never played golf, and I have no intention of starting	2566	51.3



(At the most) 30% of non-golfers are potential target customers



Theoretically, there are about 30 million potential target customers

What kind of golf are you interested in playing?

Agree



Disagree

- Being able to play at a reasonable price
- Being able to play without spending too much on gear
- If it improves my health
- Being able to spend time with the family
- Being able to play without having gear
- Being able to play for a short duration without spending a whole day
- Being able to spend more time with family and friends
- Being able to make new friends
- Being able to go to the golf course without a car
- Being able to enjoy through schools, local facilities, etc.
- If it increases the opportunity of stepping up my career, or business opportunities
- If a Japanese player wins a medal in the golf competition of 2020 Tokyo Olympics
- If a Japanese player wins a major overseas competition in 2019
(Masters, U.S. Women's Open)

II. Golfer Survey

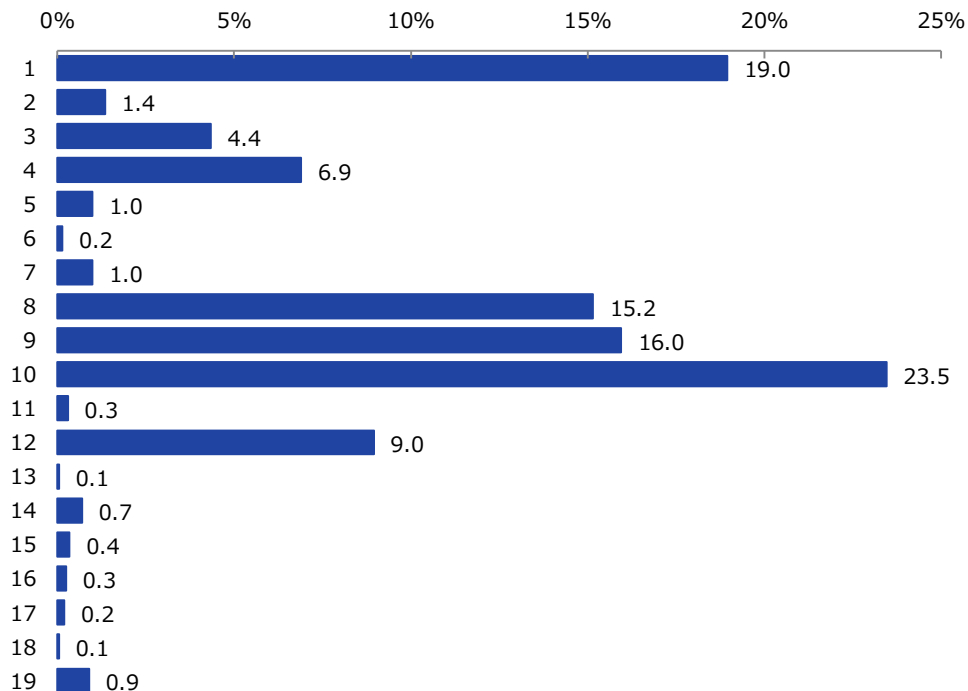
1. Golfer's profile



II. Golfer Survey

Reason for starting to play golf

	n	%
Overall	2000	100.0
1 I (voluntarily) began golf after becoming interested in it	379	19.0
2 I became interest after watching a live golf tournament on TV	27	1.4
3 Recommended by my spouse	87	4.4
4 Recommended by my parent	138	6.9
5 Recommended by a sibling	20	1.0
6 Recommended by my child	3	0.2
7 Recommended by a relative	20	1.0
8 Recommended by a friend	303	15.2
9 Recommended by a colleague at work	319	16.0
10 Recommended by my superior at work	469	23.5
11 Recommended by a subordinate at work	6	0.3
12 Because I needed to for work	179	9.0
13 After being recommended by a professional	1	0.1
14 Through schools and classes	14	0.7
15 Because I was a caddy before	7	0.4
16 I've worked at a golf course before	5	0.3
17 I used to work at a golf practice course	4	0.2
18 Because I used to work at a golf shop	1	0.1
19 Other – please specify:	18	0.9



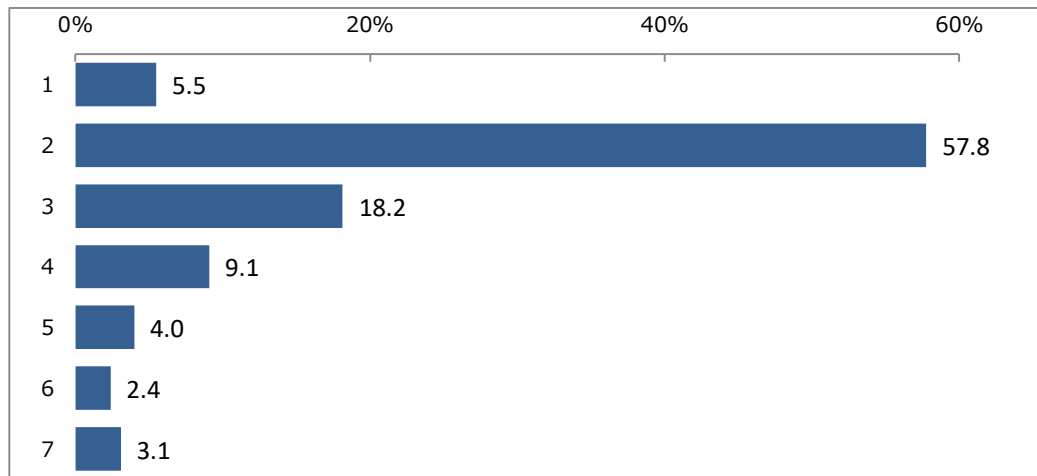
Age of starting golf

**Average:
31.69 years old**

II. Golfer Survey

Annual number of rounds (18 hole)

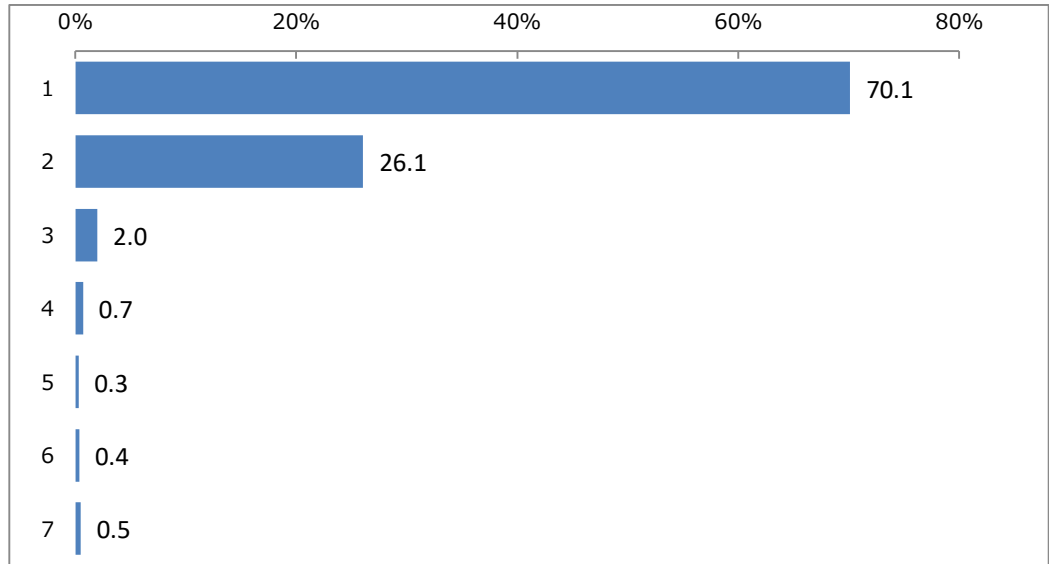
	n	%
Overall	2000	100.0
1 0 rounds	110	5.5
2 1 to 10 rounds	1155	57.8
3 11 to 20 rounds	363	18.2
4 21 to 30 rounds	182	9.1
5 31 to 40 rounds	80	4.0
6 41 to 50 rounds	48	2.4
7 >51 rounds	62	3.1



II. Golfer Survey

Annual number of rounds (9 hole (half play))

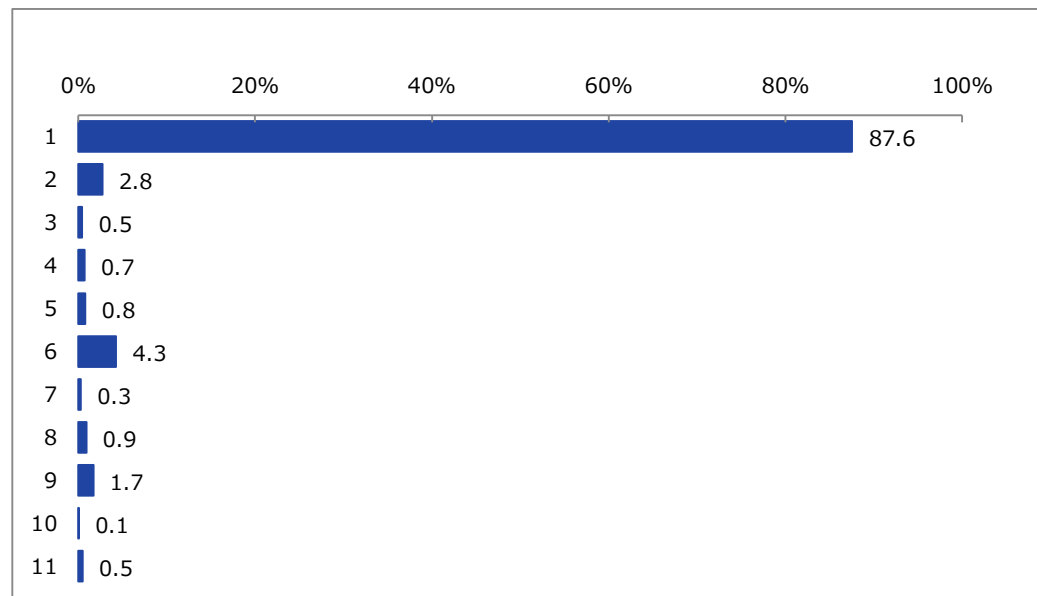
	n	%
Overall	2000	100.0
1 0 rounds	1402	70.1
2 1 to 10 rounds	521	26.1
3 11 to 20 rounds	40	2.0
4 21 to 30 rounds	14	0.7
5 31 to 40 rounds	6	0.3
6 41 to 50 rounds	7	0.4
7 >51 rounds	10	0.5



II. Golfer Survey

First golf experience

	n	%
Overall	2000	100.0
1 Golf practice course (range)	1751	87.6
2 Short courses (par 3)	55	2.8
3 Park Golf	9	0.5
4 Indoor golf facility	14	0.7
5 Round of 9 holes at a golf course	16	0.8
6 Round of 18 holes at a golf course	86	4.3
7 Simulation golf	6	0.3
8 Putting	18	0.9
9 Golf school	34	1.7
10 Golf Shop	1	0.1
11 Other – please specify:	10	0.5



Annual average score and handicap

- Average score 105 (1,759 respondents)
- Average handicap: 23.82 (207 respondents)

II. Golfer Survey

History of playing golf

		n	<1 year	1~4 years	4~6 years	6~11 years	11~16 years	16~20 years	>20 years
Overall		2000	7.9	26.5	19.5	27.2	16.9	16.0	86.0
		100.0	4.0	13.3	9.8	13.6	8.5	8.0	43.0
Gender	Male	1680	5.2	19.4	14.8	21.8	13.6	14.1	79.1
	Female	320	2.7	7.1	4.7	5.4	3.3	1.9	6.9
		100.0	3.1	11.5	8.8	13.0	8.1	8.4	47.1
Age Group	15~29 years old	289	4.8	15.3	5.4	2.6	0.5	0.2	1.1
		100.0	16.6	52.9	18.7	9.0	1.7	0.7	0.3
	30s	306	2.0	5.6	6.6	10.2	4.2	1.3	0.7
		100.0	6.5	18.3	21.6	33.3	13.7	4.2	2.3
	40s	389	0.6	3.0	4.4	8.5	6.4	6.5	9.5
		100.0	1.5	7.7	11.3	21.9	16.5	16.7	24.4
	50s	378	0.4	1.5	2.0	3.2	3.3	3.9	2.3
		100.0	1.1	4.0	5.3	8.5	8.7	10.3	62.2
	60s	387	0.1	0.9	1.0	1.7	2.2	3.0	2.9
	100.0	0.3	2.3	2.6	4.4	5.7	7.8	77.0	
>70s	251	0	0.2	0.1	1.0	0.3	1.1	2.2	
	100.0	0.0	0.8	0.4	4.0	1.2	4.4	89.2	



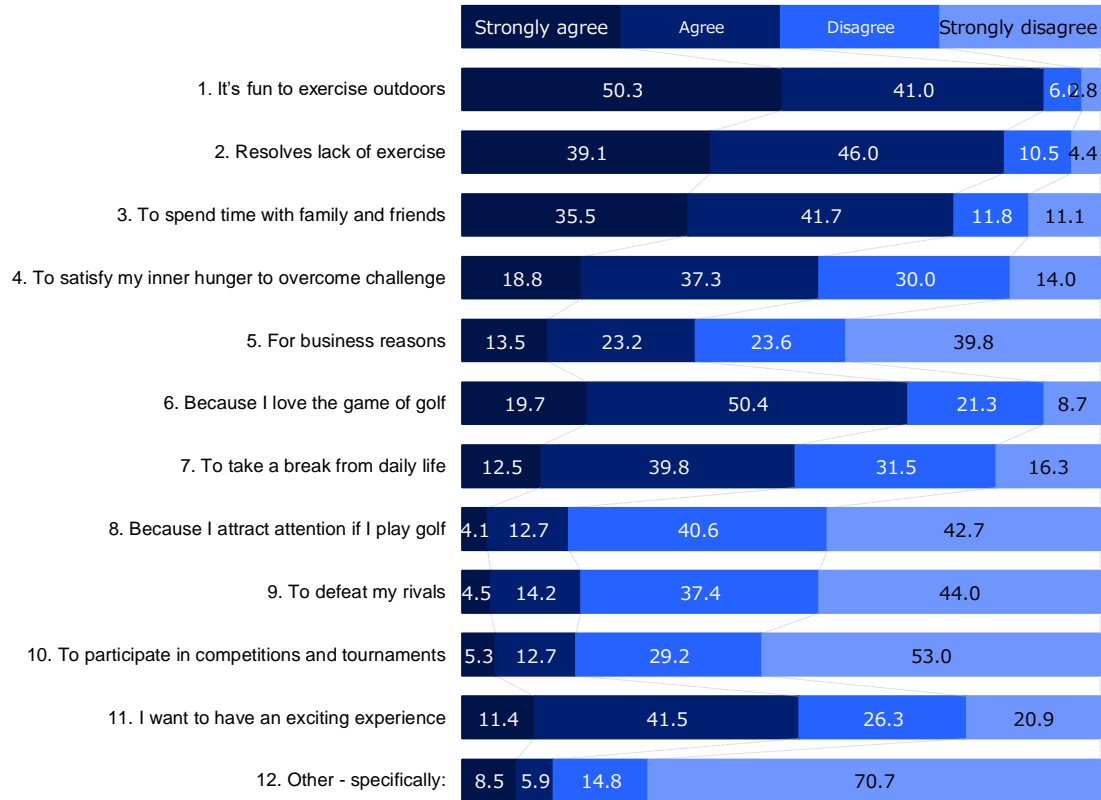
II. Golfer Survey

2. Golfer's preferences & behavior



Reasons for playing golf

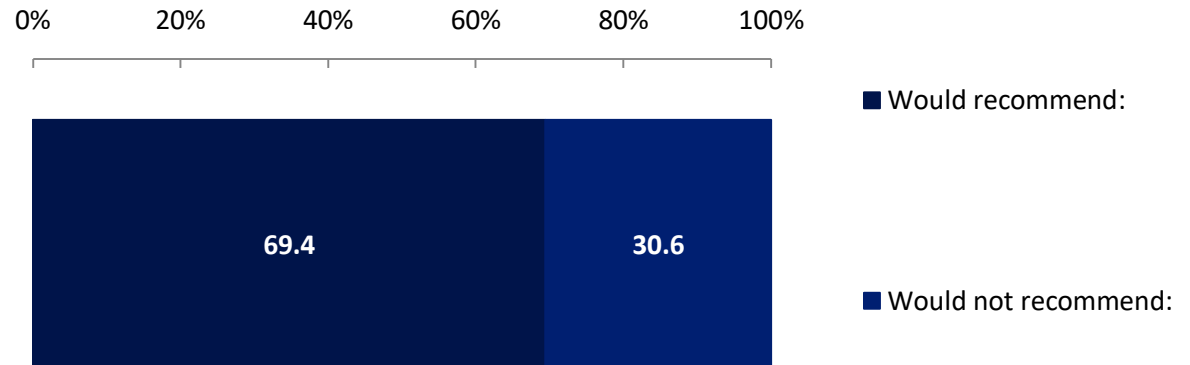
	n	Applicable	Applicable (if I had to pick)	N/A (if I had to pick)	N/A
1. It's fun to exercise outdoors	2000	1006	820	119	55
	100.0	50.3	41.0	6.0	2.8
2. Resolves lack of exercise	2000	782	920	210	88
	100.0	39.1	46.0	10.5	4.4
3. To spend time with family and friends	2000	709	834	235	222
	100.0	35.5	41.7	11.8	11.1
4. To satisfy my inner hunger to overcome challenge	2000	376	745	600	279
	100.0	18.8	37.3	30.0	14.0
5. For business reasons	2000	269	464	472	795
	100.0	13.5	23.2	23.6	39.8
6. Because I love the game of golf	2000	393	1007	426	174
	100.0	19.7	50.4	21.3	8.7
7. To take a break from daily life	2000	250	796	629	325
	100.0	12.5	39.8	31.5	16.3
8. Because I attract attention if I play golf	2000	81	254	811	854
	100.0	4.1	12.7	40.6	42.7
9. To defeat my rivals	2000	90	283	747	880
	100.0	4.5	14.2	37.4	44.0
10. To participate in competitions and tournaments	2000	105	253	583	1059
	100.0	5.3	12.7	29.2	53.0
11. I want to have an exciting experience	2000	228	830	525	417
	100.0	11.4	41.5	26.3	20.9
12. Other – please specify:	950	81	56	141	672
	100.0	8.5	5.9	14.8	70.7



II. Golfer Survey

Would you recommend golf to your peers (family, friends)?

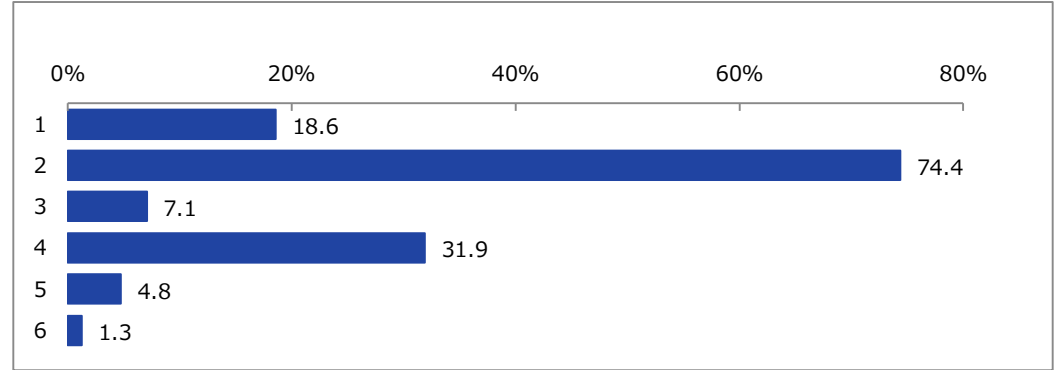
	n	%
Overall	2000	100.0
Would recommend:	1388	69.4
Would not recommend:	612	30.6



II. Golfer Survey

People whom you frequently play with

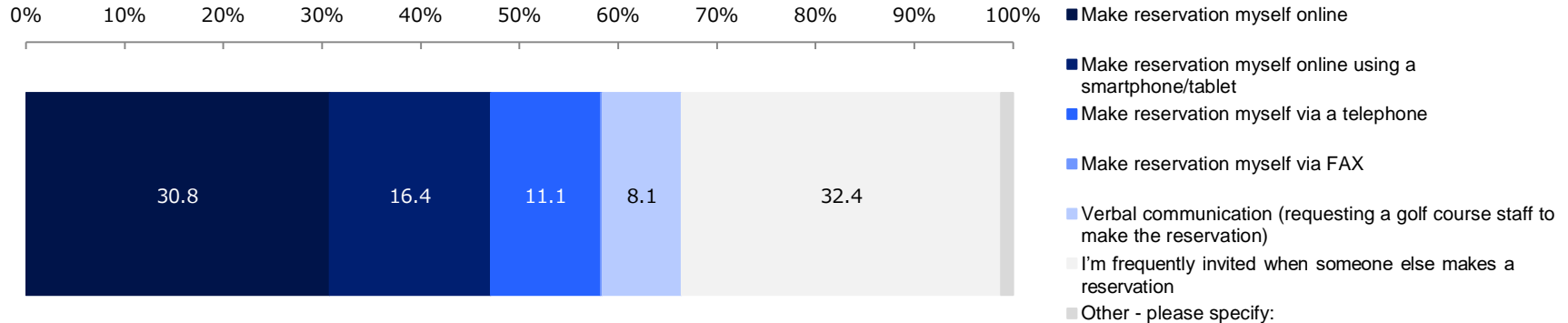
	n	%
Overall	2000	100.0
1 Family	371	18.6
2 Friends (golf buddies)	1487	74.4
3 Other club members	141	7.1
4 Work acquaintances (clients, business partners, etc.)	638	31.9
5 Usually random	95	4.8
6 Other – please specify:	25	1.3



II. Golfer Survey

Reservation methods

	n	%
Overall	2000	100.0
1 Make reservation myself online	615	30.8
2 Make reservation myself online using a smartphone/tablet	327	16.4
3 Make reservation myself via a telephone	222	11.1
4 Make reservation myself via FAX	4	0.2
5 Verbal communication (requesting a golf course staff to make the reservation)	161	8.1
6 I'm frequently invited when someone else makes a reservation	647	32.4
7 Other – please specify:	24	1.2



Annual fee of a golf course

History of playing golf

**Average:
119,300 yen**

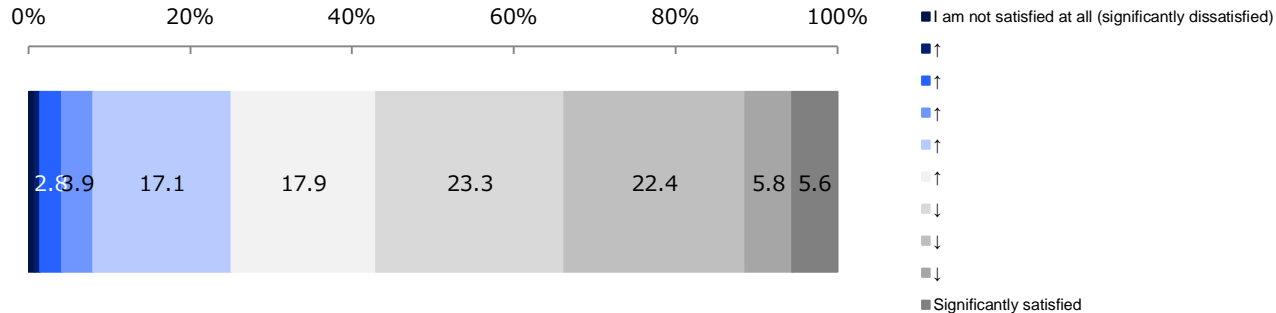
Average price of playing a round of golf (total cost including play fee, transportation, meals, etc.)

**Average:
18,350 yen**

II. Golfer Survey

Level of satisfaction at the golf course you most frequently play at

	n	%	
Overall	2000	100.0	
I am not satisfied at all (significantly dissatisfied)	15	0.8	4.2
↑	13	0.7	
↑	55	2.8	
↑	77	3.9	62.1
↑	342	17.1	
↓	357	17.9	
↓	466	23.3	33.8
↓	447	22.4	
↓	116	5.8	
Significantly satisfied	112	5.6	



Golfer's preference (binary choice)

**Golf via
a car**

vs

**Golf via public
transportation**



95.7%

4.3%

Golfer's preference (binary choice)

18 holes
(through-play)

VS

Meal breaks
at half time



34.5%



65.5%

Golfer's preference (binary choice)

**With a
caddy**

vs

**Without
a caddy**



20.3%

79.8%

Golfer's preference (binary choice)

Easily accessible course
with affordable play fee

VS

Not-as-accessible course that
is used in pro tournaments



89.7%



10.3%

Golfer's preference (binary choice)

A course in sub-par condition, but is easier to produce a good score

VS

A course in great condition with beautiful views, but is difficult



46.0%



54.0%

Golfer's preference (binary choice)

**Focus
on score**

vs

**Focus
on fun**



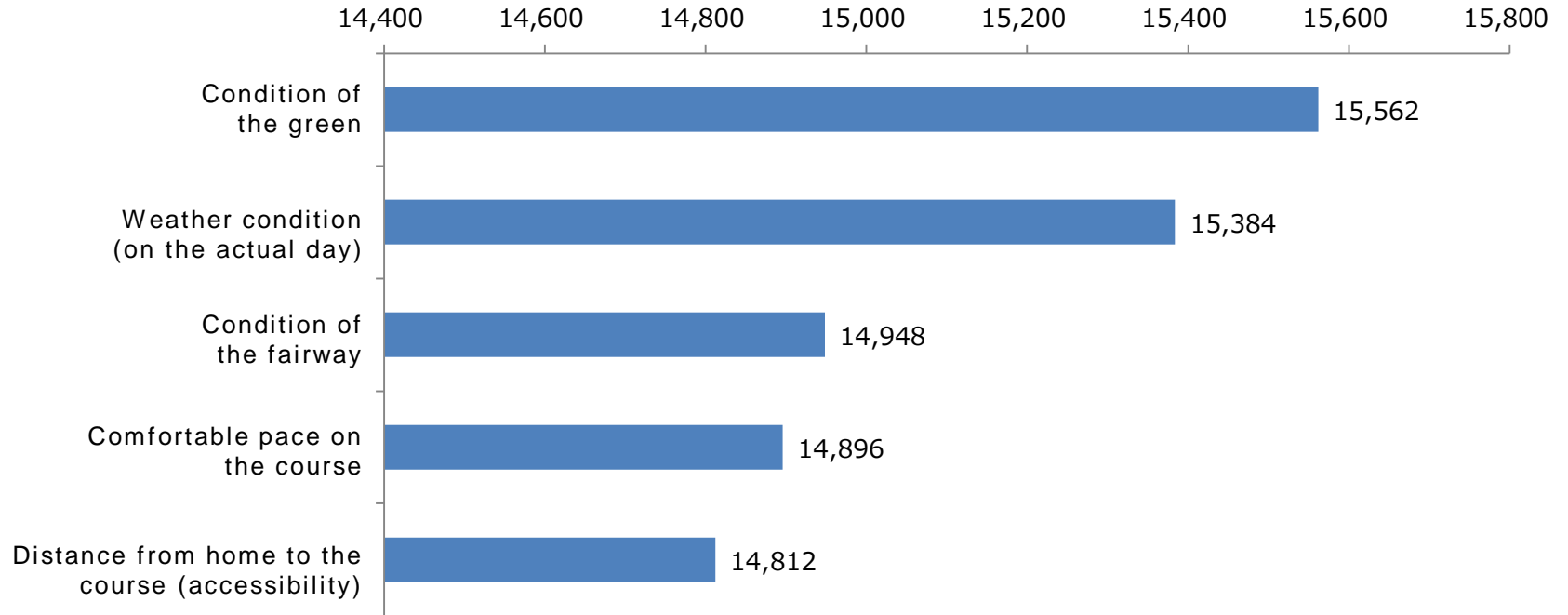
21.9%

78.1%

II. Golfer Survey

Factors during play that are most focused on (top 5)

— Point Conversion Chart —

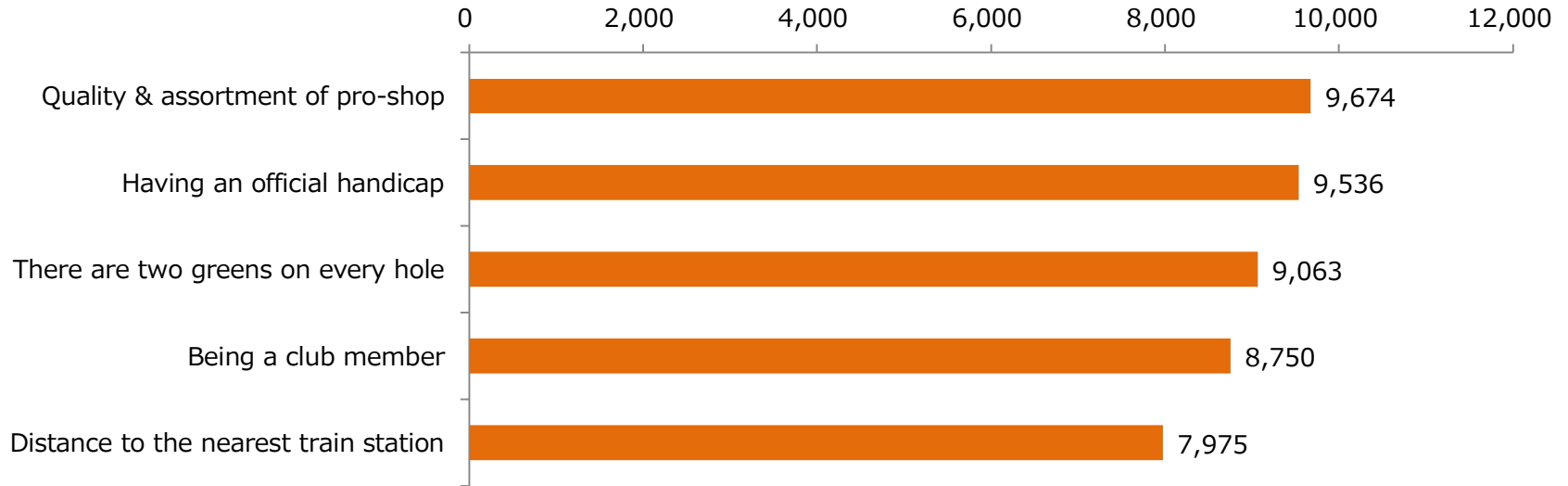


※ Each level of importance is assigned a predetermined number of points (i.e. 10:10 points, 9:9 points), and the numbers illustrate the total points for each category. The higher the point, the "higher the importance" of the particular factor is.

II . Golfer Survey

Factors during play that are least focused on (top 5)

— Point Conversion Chart —

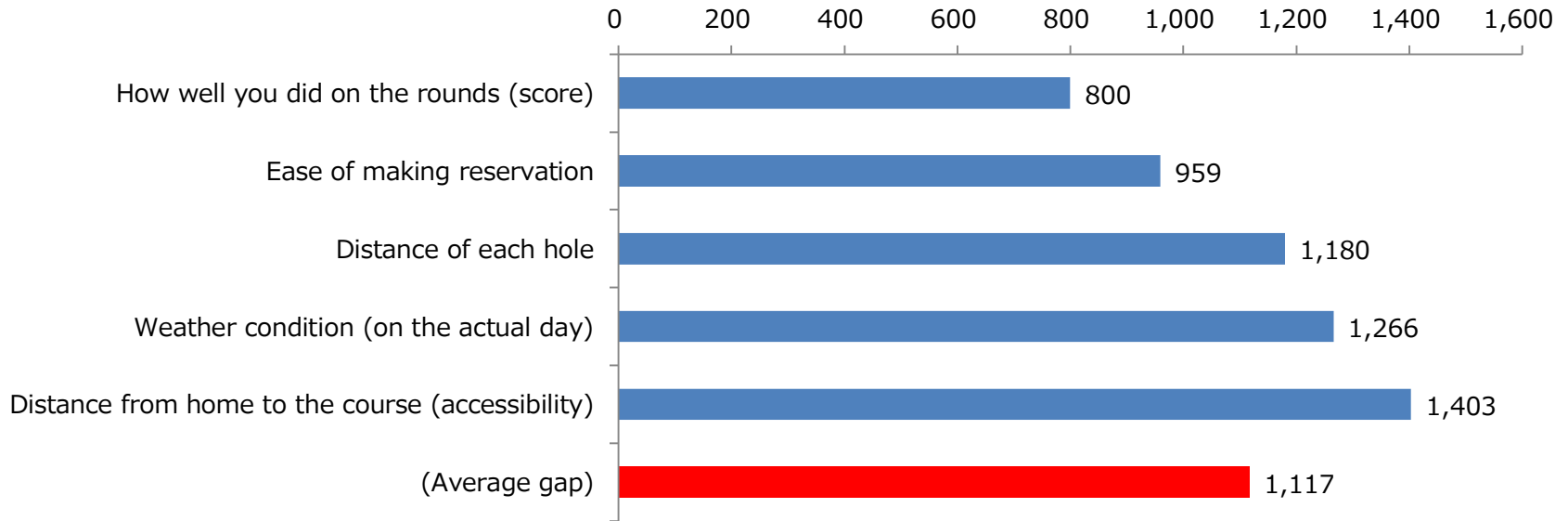


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II . Golfer Survey

The gap between golfers & golf courses on their awareness regarding play

Top 5 factors that are regarded majorly different between golfers and golf courses
(important to golfers, but not to a golf course)

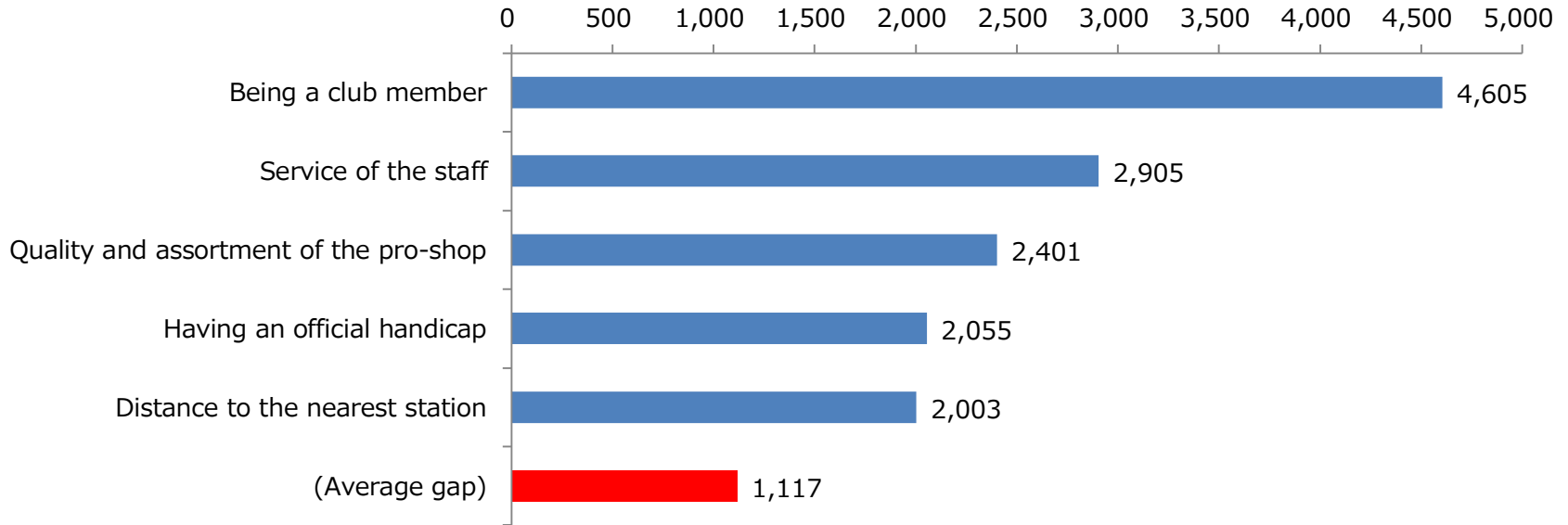


※ The results of the golfer survey and golf course survey are compared using statistical methods

II . Golfer Survey

The gap between golfers & golf courses on their awareness regarding play

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Thank you!

5th Golf Innovation Symposium
