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England golf literature review: Understanding the key components of retaining golf club members

Report for England Golf

September 2016



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Introduction

Complete a comprehensive literature review to inform a themed summary of the "X" components of retention of club members in golf in order to provide evidence-based, practical guidance to clubs.

Deliverables

- Literature review
- Summary of the key components of retention (critical success factors)
- Presentation of the findings (for Club Managers Advisory Group)
- Practical suggestions for meeting the key components (report recommendations)
- The guidance will underpin and complement delivery of demand led workshops

National context

Golf setting

May et al (2013) identify three sizes and degrees of formalisation in voluntary sector sport – informal, semi-formal and formal. Golf in their view sits in the formal sector which had an average membership of 268 members. The data from England Golf illustrated below shows the real complexity, diversity and variations across the four sub-sectors in courses in England in Tables 1-3. The golfing landscape in England is divided between different types of courses, in various regions having considerable variations in mix between municipal, private member clubs and proprietary. But, even this simplistic division into 3 categories masks the true variations in resources, volunteer base, staffing (management and green-keeping), ethos and culture. The true mixture of golf in England contains an eclectic and rich tapestry of varied clubs and wider societies and ‘non-club based’ participants in golf. Table 1 illustrates the bias towards private clubs and the now small number of municipal or Artisan clubs, with proprietary membership making up now 37%. There is a total of 1950 clubs with around 44,000 core decision making volunteers. A study undertaken in 2001 (Mort and Collins, 2001) identified a total of 1870 courses in England of which 11% were Municipal in 2001. It was suggested around 40% were added in the boom years of the 1980s. early 1990’s recession hit golf badly and a decline in rounds of golf played was seen across private, proprietary and municipal. Municipal experienced the largest decline in golf participation. This said golf participation has increased from 1976 to 1997 from 4.6 million to an estimated 7.7 million (BMRB, 1997), despite the slight decline and stabilisation around the 1990s recession.

Membership type	Number of clubs (%)
private	1019 (51%)
proprietary	712 (37%)
municipal	149 (8%)
artisan	70 (4%)

Total	1950
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Table 1: Breakdown of membership types in England [Source: England Golf (Breeze database of affiliated venues), September 5th 2016].

This table above also illustrates how the spread of volunteers is also distributed across a diversity of varied golf club members and participants. Table 2 below shows the breakdown of facilities (often clubs, but not always) affiliated to England Golf. It also illustrates that a number of clubs have a mix of 18, 9 and driving range facilities, again further complicating the picture of membership by ‘type’.

Affiliated facility type	Number of facilities
Standard 18 hole Courses	1702
Par 3 Courses	120
Driving Ranges	402
Total*	1704

Table 2 Affiliated golf venue breakdown by mix of facilities [Source: Sport England Active Places and England Golf, Sept 5th 2016]. *Note this comprises a facility mix at multiple venues.

Finally, Table 3 shows those facilities in golf that lie outside of official affiliation to England Golf. These will be again distributed across a varied landscape of proprietary, private members and municipal and artisan club membership types. This group whilst facility based also does not include the extensive Golf Society participant market and what England Golf have referred to as the ‘nomadic’ or independent golf market that lies outside the boundary of the facility setting. Examination of these settings is beyond the scope of this report. But in the context of volunteers it is critical to acknowledge the complex sub-markets and local/regional variations across England that provide essential context to the volunteer experience.

Facility type	Number
Standard 18 hole Courses	167
Par 3 Courses	139
Driving Ranges	204
Total*	399

Table 3: Breakdown of Non-Affiliated golf club facility mix in England [Source: Sport England Active Places and England Golf, Sept 5th 2016]. *Note this comprises a facility mix at multiple venues.

FINDINGS

Market segmentation, insight in the golf membership market

There is a very limited set of peer reviewed studies that embrace the position of market segmentation as a driver in recruiting and retaining volunteers. Studies that are present are often data, very specific to other countries than England or based on minimal data, but a fair amount of presupposition and assumptions/personal view point of the authors. In contrast to this, there is a reasonable amount of empirical evidence and theory led work that sits outside the business or market-led approach that England Golf can learn from in terms of recruitment and in particular retaining members.

This study has used a literature search approach to unpick the articles and studies that can help contribute towards understanding retention of memberships within clubs in England. However, the first thing to state is that evidence on this sport specific niche aspect of insight is incredibly limited. Therefore, major assumptions and strong evidence-led guidance on this matter would in the view of this researcher need to be the subject of further research. This headline finding is important to recognise. This is not to say that lessons for retaining members cannot be learnt.

Role of the volunteer in retention – the participant experience

Increasing participation is central linked to ability of volunteers that organise, support and run sport and their capacity (Cuskelly, 2004). This is a long established link and widely acknowledged in Australia, Canada and England. This is specifically an important factor considering the diversity of types and settings that golf activity and membership occurs in its broadest format. Thus, the context of what the volunteer role is varies considerably between private membership, municipal, pay and play and proprietary clubs. Membership 'retention' is taken in this literature review to be sustaining continued paid membership at a golf club regardless of setting. A further tier of complexity is also necessary to acknowledge that the golf participation journey (see Mackintosh, 2017 forthcoming) is often varied and has movement between membership settings and types as a core feature. Some authors draw the distinction between core and peripheral or formal and informal volunteer (Ringuet-Riot et al, 2104). In relation to club membership retention this distinction is important to also recognise as core volunteers set the business ethos, culture and direction of the 'club' in whichever sector it sits in. But, there is also a range of wider factors in golf clubs that also appear to influence membership, retention and the quality of golf experience.

Journey of new participant

The most popular term used by Sport England at present is that of the 'customer'. It is crucial to recognise that this is contested in the golf literature, with the bias being towards the golf participant, engaged in participation in a recreational activity as a paying customer. In other research recently undertaken by Mackintosh (2016) it was found that the term 'customer' did not 'fit' with all potential participants in the game. It did perhaps fit neatly with societies, one-off paying independent and what have been termed 'nomadic' (England Golf, 2014) individuals and groups. However, those people playing and participating in a wider club, talk of the ethos, culture and values of 'their club'. This includes looking after a history, set of values and philosophy that is in their eyes unique to the club (Groom et al, 2014; Nichols et al, 2016; Perkins, 2010).

Nichols, G., & James, M. (2008). One size does not fit all: Implications of sports club diversity for their effectiveness as a policy tool and for government support

This what is perhaps more interesting and useful is to start of consider how each club as a unit of business operation builds its new and existing customer or participant journey from first experience to sustained membership. Statistics within England Golf (England Golf 2014) illustrate 'churn' in membership. This phenomenon has not been explored elsewhere in the literature. Thus, it also again remains to be seen what causes ex-members to move on, leave the game or shift clubs.

There have been studies of segmentation Fanning, S. F. (2003- no data), pricing of membership fees and club approaches to membership

Ferreira, R. R., & Gustafson, C. M. (2006). Select performance differences in equity and non-equity membership structures within private clubs

Mulligan, J. G. (2001). The pricing of a round of golf: The inefficiency of membership fees revisited. *Journal of Sports Economics*,

Lee, J., Kim, H., Ko, Y. J., & Sagas, M. (2011). The McGinnis, L. P., Gentry, J. W., & Gao, T. (. (2012). Antecedents to consumer perceptions of sacredness in extended service experiences

Back, K., & Lee, J. (2009). Country club members' perceptions of value, image congruence, and switching costs: An exploratory study of country club members' loyalty

Iwasaki, Y., & Havitz, M. E. (2004). Examining relationships between leisure involvement, psychological commitment and loyalty to a recreation agency

Cohen, E. (1995). Golf in Thailand: From sport to business. *Asian Journal of Social Science*, 23(2), 1-17.

Markwick, M. C. (2000). Golf tourism development, stakeholders, differing discourses and alternative agendas: The case of Malta

Shaw, V., & Alderson, J. (1995). The marketing activities of new golf developments in the UK and Ireland

McHardy, A., Pollard, H., & Luo, K. (2006). *Golf injuries: A review of the literature*. Cham: Adis International.

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Hallmann, K., & Wicker, P. (2015). Determinants of sport-related expenditure of golf players and differences between light and heavy spenders

Hwang, J., Han, H., & Choo, S. (2015). A strategy for the development of the private country club: Focusing on brand prestige

Women and girls golf – membership retention

Eime, R. M., Harvey, J. T., Craike, M. J., Symons, C. M., & Payne, W. R. (2013). Family support and ease of access link socio-economic status

Recreational golfers in England and club culture, women's experiences from their own perspective (Mitchell et al, 2016). Well-established literature on challenges facing women golfers in club settings (Haig Muir, 2002; Chambers, 1995; Pfister and Hartmann-Tews, 2003; Hundley, 2004; McGinnis, 2005; Maas and Hasbrook, 2001; Mitchell et al, 2016). Mitchell et al (2016) refer to this as gendered practices from handicaps and use of bars and aspects of the club and grounds. Study based in east Midlands in a club with 60 female members, approximately 13% of overall membership, undertaken with 13 members over a period of 18 months. Key findings

1. Being highly visible and 'exposed' to the critical gaze of men. Supports earlier research by Maas and Hasbrook (2001) in USA that suggests anxiety is built up over negative gender stereotyping.
2. Language, 'mocking' and sexism asserted by some male members
3. Assumptions about play being 'slow'
4. "marking" as 'different' parallels research in North America (McGinnis et al, 2005) and Canada (Wood and Danylchuk, 2011). Examples of women playing off men's tees, challenge term 'lady'.

"it is perhaps more surprising that such sexism and othering endures into the twenty-first century, despite numerous initiatives within golf and other sports, aimed at increasing inclusivity" (Mitchell et al, 2016; p.283).

Conclude – not assuming privilege of male members, making unwelcoming atmosphere to the sport that aligns less to male assumption and more to modern female equitable view.

Constructing a group culture and connecting with group members (Wood and Danylchuk, 2011). Based on in depth analysis of lives of group of Canadian golfers at a municipal course.

- Processes need to move beyond the individual level (motivation and attitudes, attachment to activities)
- Membership in different 'social worlds' – interest in serious competition, lack of interest in rules and increased interest in spending quality meaningful time together.
- Role of social groups in activity continuation (Kyle and Chick, 2002, 2004)
- Shared identity, connections and opportunities to meet similar people (Green, 2001; Snelgrove, 2008)
- Processes and meanings at heart of continuing to participate (Wood and Danylchuk, 2011)

Findings

Varied routes into membership and participation – golf opportunity to socialise and deepen relationships. But for women it was heavily influenced by their social circle of friends (Heuser, 2005; Kyle and Chick, 2002, 2004).

"My favourite part is just getting together and it's like, there's about 12 or 14 [of us] or whatever"

"If I wasn't golfing with [the group] I wouldn't be here. I wouldn't come."

Opportunities to connect and socialise beyond golf. Need to be in a group setting due to the technical challenge of golf. Continued participation despite frustration in part due to the desire to connect. Long established that development of technical skill a key barrier to continued participation (Iwasaki and Havitz, 2004).

Desire and need for routine and structured participation (once a week, certain evenings/days).

Downplaying of competition in relation to other elements of their club and constructing unique rules. Group decision not to engage in 'serious play' and clash with other members in the club (too loud, too much fun, lack of regard). Unique rules included additional tee shots, taking balls out of the rough as accepted in their group culture. They also specifically avoid giving each other advice on how to play or improve, just always encouraging.

"Many of the women discussed how the group's focus on enjoyment over expertise was one of the main reasons why they kept playing golf, especially when the sport was difficult at the onset of participation" (p.376)

Participation with others not individually leads to higher likelihood of continued engagement (Burke et al, 2006).

Why do older people play (and continue) to be a golf member ?

Stenner et al (2016) study based in Australia – parallel in that participation declining by 5% during the decade to 2010. Australia – uses new types of membership to attract new members and retain them and avoid perceptions that golf is elitist and expensive (Golf Australia, 2014). Based on 31 golfers in 5 focus groups in private members and semi-private (which do allow public to pay and play) in Adelaide.

Golf Australia indicates that "the introduction of less-expensive categories of membership with limitations on some playing rights by many clubs has broadened the demographic of the membership base" (Stenner et al, 2014). Study established reasons and motivations for involvement. But, also considered in terms of retention of members

- Ability to seek out range of opportunities (competition and social)
- Perceived health benefits – physical, cognitive and mental health
- Sense of belonging and "a community around a shared interest" –
- New relationships – transition from work to retirement where work relationships have been lost.
- Communication "during the round" – allowed support to be offered to those in need
- Fun and enjoyable – interactions before, during and after
- Negotiation of the ageing process (Baker et al, 2010; Dionigi et al, 2011)
- Unlikely to part just for sake of it, they knew benefits, but it was the source of enjoyment that was key.
- "the importance of social involvement, the sense of belonging to a group, and the social rewards obtained from involvement with friends and groups with similar interests were identified as important aspects of golf participation" (Stenner, 2016; 268).

Only study previously to examine why older players play is by Siegenhaller and O'Dell (2003) based on US golfers aged 67-87. This study found that people engaged with golf to maintain physical and cognitive function but also that differences were significant between 'devotees' and social golfers.

Funk, D. C., Beaton, A., & Pritchard, M. (2011). The stage-based development of physically active leisure

Skills of club managers alongside skills of the volunteer in new member retention

Unreported, under researched gap in current understanding for membership recruitment and retention.

Koenigsfeld, J., Youn, H., Perdue, J., & Woods, R. H. (2012). Revised competencies for private club

SECTION: Pilot study findings on membership retention

Wider study of golf club volunteers and club development (Mackintosh, 2016) gave the opportunity to pilot some exploration of the issues and themes around retention of members in the context of municipal, proprietary and private members golf clubs. This was undertaken as the initial phase of the literature review in this study had illustrated a considerable lack of evidence and past studies in this specific area of golf research. The research was based on 11 1 hour focus groups and 11 face-to-face interviews that included topics such as volunteering motivation, but also routes into participation and reasons for continued involvement in the game.

- Motivation for joining “gap” with reality of experience

Themes from within data of pilot study:

- Nature of ‘playing membership’ has changed
- Ability, but also willingness of clubs across diverse sectors to adapt, change or know what to do
- Diversity of club cultures, approaches and distinct typologies of clubs, club volunteer workforces and ethos/feel of clubs
- Wider issues within the game – hinted at by key volunteers
 - a. Elitist
 - b. Gender and treatment of women
 - c. Etiquette and informal and formal rules
 - d. Technical nature of game and learning the sport ‘support’
- Age of membership, volunteer workforce and attitudes to new member
- Flexibility to organisational change (membership, volunteer roles, styles of play and format)

Customer focus approach – ‘learning from the ladies’

R5: I would disagree with you, I think if we treat people as customers, then we don’t do the other things that makes you stay in a club so the part that says, I think ladies do this far better than men so if a lady’s ill, we have a fund, the ladies have a fund and flowers will be sent. Probably all of you do that ... ?

R3: Yeah, they do ... [some agree] ... [overtalking] ...

R5: The lady captain will go and visit them and that lady, this sounds very sexist, she feels part of the club and when she’s recovering, somebody will go and pick her up, bring her up because they all have whatever on a Tuesday and that’s their social ...

R2: They’re more inclusive aren’t they, the ladies?

R5: Yes, much more inclusive, so they’re not a customer, they are ...

R2: Friend, colleague ...

R5: ... part of us and a friend.

Int: Do you not like this term, “customer”?

R5: I personally don’t, no.

Chairperson Volunteer Focus Group

R1: Well in effect they are but we've never used the term and I've been around golf clubs for years, I've never heard the term "customer" ever, they're members but not customers.

R3: John Lewis never call people in their shops, do they, they're all partners, brings you into that sort of elite sort of group, your customer to me is the society, the casual visitor because they're not initially coming to join your club there, they're passing through so they're more customers I believe than somebody who's there hopefully for the long term.

Int: This is incredibly important for the governing body to hear.

R4: I'd say that as the headline, they are customers and you have to, if you walk into a restaurant or a store, you want to give fantastic customer service and the only reason you're doing that is very selfishly, you want the people to come back to you.

I don't see any difference between that and what we've done, we got rid of two people in our pro shop because we didn't think they could greet the customers in the way that we wanted and to come back to the nomads, everybody that walks through that gate and goes into the pro shop, is a potential member, every time it happens and they might come from 20 miles away, in which case they probably won't be a potential member but so many of the nomadic golfers are potential members, try and get as much information from them, try and give them the best experience that you can give them, so in that respect, if you're trying to explain this to your staff, talk great customer service, don't talk about anything else because we all recognise what great customer service is, even the girls who bring the food out from our kitchen, you know, know what great customer service is because they experience themselves if they, when they go out, so I think it's a customer in that respect, whether we'd like to use it, I personally do use it and I think it is, it's something that you get your mind around, you want to give great customer service and you want to go from there. If that transfers into a membership, brilliant.

Int: David, what's your thoughts?

R1: The same, I mean we've unfortunately just lost our pro, he's gone to another local club but we've got a new guy come along, he's got a difficult act to follow in that respect but the previous one before he left, certainly over the last three years and last year particularly, we saw a great influx of return visits, we used tee off times, much to the disgruntlement of some but we control it, they can't just book online any old tee time but the amount of new business that has driven and in some cases, new members and certainly repeat business, tend to differentiate in so much that you've got your ones who join but you look at it that people who go into the pro shop as visitors, are customers but we want them as you rightly say, to experience great customer service, we want them to come back and get as much information as we can.

Tee Off Times factor

It's not the right thing to do probably but you want to side-track them from tee off times next time around, "come to us direct", so you get their email address and whatever contact numbers and that's working reasonably successfully.

It's a difficult process we're having at the moment because of this changeover in the pro but hopefully that will resurrect itself and continue. But that's it, they've got to enjoy coming to Hollywood and go away and say "I've just been to a great golf club today."

Customer service

R2: That's why I agree with you, I think the term "customer service" is right because that's what we should be trying to do from the bar to the catering side, to the pro shop, I'm not saying I'm against the term, I've never really thought about the term, "customer" but why not? Because that's what they are in the end... I think most members in our club would probably be horrified because they're a bit staid, stuffy and all this and they're members, longstanding members but I think the ethos of customer service is the important thing, we're giving the best possible service to these ...

Rejection of term customer

R5: I'm with the ethos, I think if I started using the word "customer", I could be an ex-chairman. We've just written our strategy or revised it, with a couple of members who aren't on the board actually, I've sat with them and we have not used the word "customer", we have said "We are a member focused and members first golf club", for me, yes it's great customer service but it's when the lady who brings the food out, puts the arm around a lady's shoulder and says, "It's really nice to see you back, I know you've not been well and I've brought your tea and your cake, is that what you want?" and you can see them thinking, "I'm welcome back". That's great customer service ...

R2: I don't think you could ever argue with great customer service to members, that is what you're all trying to achieve.

R4: I guess I'm making the differentiation between non-members and members because what you've just described is exactly what we'd all want and probably in different ways, we'd probably got it, ladies section, I totally recognise what you've said about the ladies section, absolutely.

Chairperson FG extract

SECTION : Conclusions

SECTION : Summary of the key components of membership retention (critical success factors)

SECTION Practical suggestions for meeting the key components (report recommendations)

SECTION Guidance to underpin and complement delivery of demand led workshops

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