

Analysis of the Québec Golf Market's Potential Executive Summary

Québec golf market



Really intend to keep on playing in the next 2 or 3 years:

- As often for 59% of golfers
- More often for 33% of golfers

The main **reasons why they would play less:**

- Lack of time (29%)
- Too expensive (23%)
- Health problems (22%)

Group outings that are organized spontaneously and quickly:

- 61% of players select the course where they will play with their group of players
- 30% chose for themselves
- 56% select the course where they will play at least 3 to 7 days in advance
- 30% select their course a day or two in advance

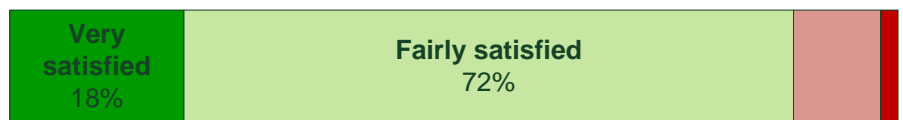
Activity portrait:

On average:
9 golf clubs per year are visited

On average:
\$120 is spent **per twosome**, including:

- \$60 for the golf round
- \$28 for food and beverage
- \$24 for transportation
- \$8 for other types of entertainment

On average, a **fairly high satisfaction rate** as 90% are very or fairly satisfied:



Poorly satisfied
9%

Not satisfied at all
1%

Main **incentives** for golfers:

- Spending time outdoors, nature, panorama (39%)
- Spend some time with family and/or friends (17%)
- Enjoy a sport activity (10%)
- Exercise, health (9%)

Main **irritants or restraints** for former or non-golfers:

- High costs
- Friends don't play

And most of all for non-golfers:

- Expensive equipment
- Prefer another sport
- Don't own any equipment
- Don't know how to play

Main **characteristics** associated with golf:

SNOB
Mostly for former and non-golfers, but also for some active golfers

Other characteristics:

- Relaxation
- Trendy
- Health
- User-friendly

Touristic Golf Market



Provenance of golfers:

- Québec: 68%
- Ontario: 25%
- United States: 7%

52% of Québec golfers have taken a golf trip including one night of accommodation

Type of groups:

- Group of friends: +++
- Couple: ++
- Corporate: +
- Family: +

Main criteria:

- Rate
- Reputation of course
- Nearby accommodation
- Nearby complementary activities (especially when out of Québec)

Québec clientele

Average expenses:
\$700 per trip

- \$226 for accommodation
- \$192 for golf
- \$118 for transportation
- \$116 for food and beverage
- \$48 for other entertainment

Out of Québec clientele

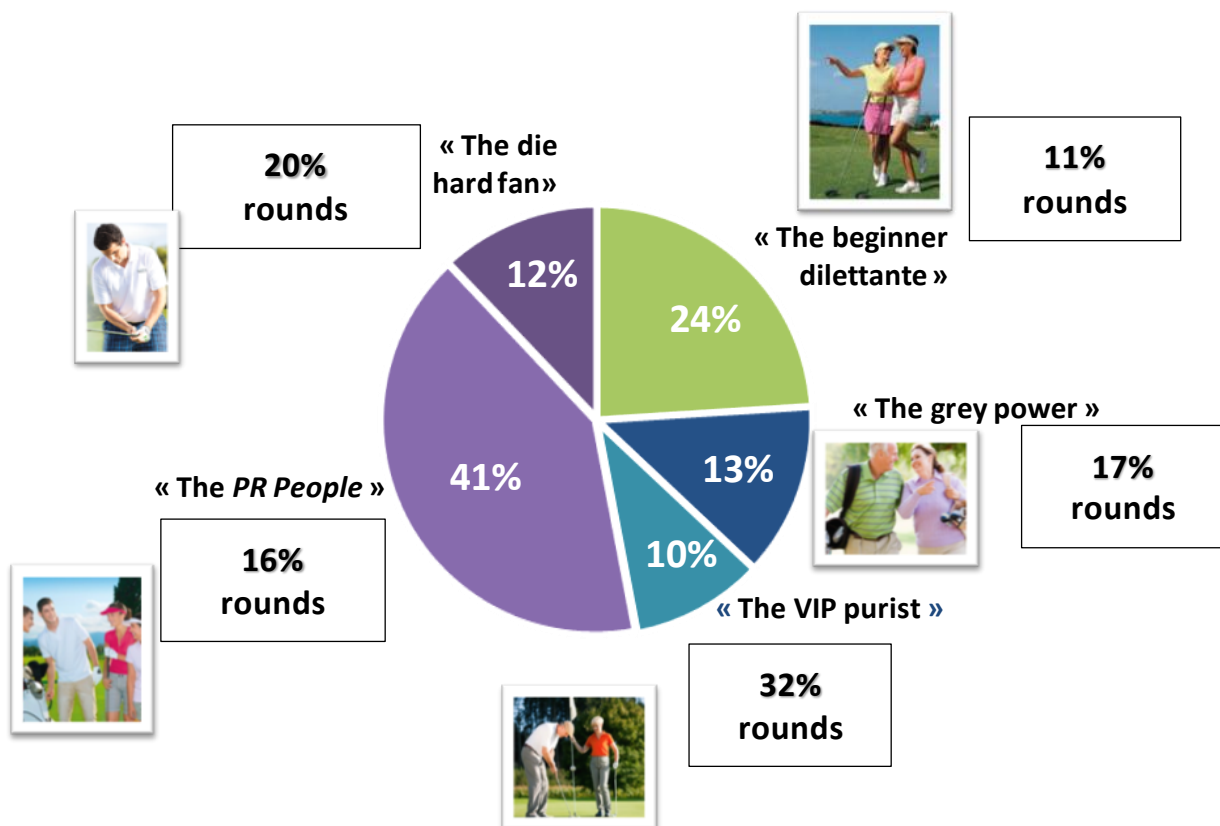
Canada:

- Mostly men: 65%
- Average age: 45.1 years old

United States:

- Mostly men: 67%
- Average age: 46.2 years old
- Especially in the North-East states and New England area

Five segments of Québec golfers



Five segments of Québec golfers

The beginner dilettante

Golf is for entertainment more than a sport, a great opportunity to get out of the house

- Looks for courses that are easy to play, close to home
- Impulsive player; will chose to play depending on the weather
- Prefers playing on week days: less traffic and can play leisurely
- Appreciates the social aspect of the game, plays with friends or spouse
- Spend very little, sensitive to cost, consults the rate and discount sections of websites
- Full rounds are too long to his liking



Main motivation factor:

- Outdoor appeal of golf

Main irritant factors:

- Costs
- Traffic
- Length of round
- Dress code

Profile

- Mostly women
- 35-44 years old, 55 years old and over

The grey power

Looking for a global experience: well-groomed course, large array of services, reasonably priced, etc.

- Prefers a well groomed and eco- friendly course, modern equipment and a large array of services
- Sensitive to professionalism of staff and how easy it is to make reservations
- Rates and discounts are important
- Golf is a social activity, rarely plays alone
- More incline to play in the evening
- Would like to play more often in the future



Main motivation factors:

- Social aspect (family/friends)
- Need to be more active

Main irritant factors:

- Costs
- Obsolete facilities

Profile

- Mostly women
- 55 years old and over
- Québec City area
- Middle income

The VIP purist

Golf is a passion and must be played according to the rules

- Gives preference to a high end course (reputation, panorama, and difficulty)
- Quality of infrastructures is important
- Likes to play on week days, in the morning
- Considers himself as a seasoned player and likes that other players are experienced as well
- Respects the rules
- Dedicates a lot of time and money to his passion



Main motivation factors:

- Outdoor sport
- Competition

Main irritant factors:

- Conditions of some courses

Profile

- 45 years old and over
- Greater Montréal
- Often English speaking

The die hard fan

The game... and nothing else!

- Considers himself as an intermediate or advanced golfer
- Cares for the course (design, conditions, skills level, etc.)
- Other services are of no interest to him-
- Likes to try new courses
- Doesn't want to feel pressure
- Like to have easy access to his sport: nearby course, affordable price
- Plays on the weekend, in the morning
- Doesn't mind playing alone



Main motivation factors:

- Outdoors and nature
- Competition

Main irritant factor:

- High traffic

Profile

- Men of 25-54 years old
- Superior income

The PR people

Golf...or après-golf?

- Opportunity for networking, for fun or business
- Prefers popular golf courses, well-known or trendy
- Faithful to 1 or 2 courses
- Food and beverage services are essential
- Mostly plays on week days (for business)
- Considers himself as a beginner or intermediate player
- Prefers shorter games



Main irritant factor:

- Expensive equipment
- Duration of the golf round
- Strict dress code

Profile

- Under 55 years old
- Montréal area
- Public transit user
- English segment
- Superior income

Strategies to reach the five segments of Québec golfers

The beginner dilettante

Positioning

Fun, having a good time, being together

Offer / Promotion

- Promote easy courses and practice ranges
- Target “city” courses and those accessible through public transit

Communication

- Internet, social networks
- Advertising in public transit

The grey power

Positioning

Experience with a capital E
Golf... and more!
Welcoming and impeccable service

Offer / Promotion

- Multi-player packages (2 for 1 evening)
- Multi-service packages (lessons, proshop, food and beverage, etc.)
- Discount for online reservation

Communication

- Facebook contests
- Promote all services on the courses' websites

The VIP purist

Positioning

Prestigious course
Top quality!

Offer / Promotion

- Multi-course discounts in a signature network
- Short high quality weekly getaways

Communication

- Profile articles such as “visitation experience” in traditional media vehicles
- Internet

The die hard fan

Positioning

Ready for this challenge?
Unique course, where the best
are playing

Offer / Promotion

- Multi-course package
- Opportunity to try high performance equipment

Communication

- E-mails/ SMS on traffic conditions
- Website: make them live the experience (videos, etc.)

The PR people

Positioning

Golf... and après-golf!
Fun, good time, being together
IT'S the place to be, where
things are happening

Offer / Promotion

- Events and entertainment
- Happy hour: 9 holes + bar package
- Short all-inclusive getaways
- Fidelity card
- Advertising, momentum

Communication

- Internet, social networks
- Posters in public transit
- Onsite promotion for upcoming events
- Partnership with young media vehicles

Translated excerpts of the “Analysis of the Québec Golf Market’s Potential” conducted by Ipsos Marketing and DAA Stratégies on behalf of the golf associations’ Industry Standing Committee.

For more information, please contact:

Denis Brisebois, DAA Stratégies : dbrisebois@daastrategies.com or 514 954-5375

Luc Durand, Ipsos Marketing : luc.durand@ipsos.com or 514 904-4344

