ESSENTIALS OF MARKET RESEARCH
FOR THE GOLF COURSE OWNER

Prepared for:
Members of
National Golf Course Owners Association

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INTRODUCTION

Golf course owners entering or operating within today's fast-growing golf industry are finding an ever-increasing competitive environment and a market place subject to economic fluctuations. To help keep pace with this changing environment, market research must be done regularly and with utmost precision. Research, done correctly, is at the heart of every successful endeavor and this manual will explain clearly and concisely how to do it.

Market research gives owners a foundation of knowledge on which to base both day-to-day and long-term business decisions. Just as most potential golf course owners begin their undertaking with some initial research that tells them whether or not their new course will be viable, annual updating of that original research will be critical to the operational success of the golf facility.

This manual, used correctly, will give golf course owners basic market research tools that provide a competitive edge. Examples will show why the various elements of an annual market study are important to golf course owners. For instance, an owner of a public fee course knows income is improved by increasing numbers of rounds played on the course and/or by increasing the fees generated on a per-round basis. Staying on top of competitive data or prices being charged by other courses will help an owner to charge the optimum price for his course, given its location, market and playability in relation to the other courses.

An owner of a semi-private course who competes with both public fee and private courses must be aware of pricing, marketing or facility changes of both kinds of courses within the market place. The owner’s challenge is to generate guaranteed membership revenue while at the same time generating more public fee rounds. Data obtained through an annual market study can assist with marketing decisions, focus on prospective new markets and help with greater
penetration of existing markets.

A private course generally attracts the golfers that may have begun playing on public or semi-private courses but now prefer to play or to join a private country club. Positioning of a private club is very important and calls for strategies which coordinate the pricing of memberships, the facilities and activities offered with the profile of the households found within the primary market area targeted.

For instance, a market area that currently has a good family-oriented private country club might also be a good market for a higher caliber "private golf club" with a more challenging course, slightly higher initiation fees and dues, and a tasteful clubhouse. A market study could help identify positive factors in the market place which indicate the potential success of such a club concept such as:

- The family country club is nearing capacity in number of golfing members.
- Demographics show strong numbers of households having incomes that could readily afford the initiation fee and monthly dues necessary to build and maintain the private golf club
- Demographics reflect a growth rate that predicts more future members for the market area
- Interviews with existing members of the family club confirm they would support and pay for a second club in addition to their family club so they can play a more challenging course and enjoy a "golf club" rather than or in addition to a "country club" atmosphere.

Resort courses can target a variety of golfers depending upon their objectives. Most reserve the majority of the tee times for resort guest usage knowing their room revenue is their "bread and butter" and most resort guests want convenient access to the golf course. Resorts may also offer
memberships and accept public fee play. The resort section of this manual will illustrate an example of a resort that may have begun as a resort/semi-private course, but developed into a resort/private course because ever-increasing market strengths pointed to greater revenue-producing opportunities. These opportunities were identified through an annual monitoring of the market.

The first section of this manual details information that should be gathered for golf course owners considering construction of a new golf facility. This data also serves as an outline for the annual market research updates recommended for all golf course owners, detailed in the second section of the manual. The potential new owner needs to:

- Discover market factors that could influence a new business venture
- Be aware of the competitive environment they are now entering
- Identify the specific market niche the new course will fill within the community

The research process begins with the black and white facts or demographics which will serve as a microscope under which a specific geographic market area can be examined. These facts and opinions, gathered through personal interviews or focus groups, will profile the population within a target market and give insights as to what golfers in the market are looking for and would support. Once gathered, the research will assist golf course owners in deciding the following:

- Optimum pricing
- Facility expansion or improvement
- New marketing opportunities or threats
- Identify prospective golfers for the golfing facility

It should be emphasized that the research process outlined on the next few pages is not only very
easy to do, but can be exciting as well. The researcher chosen to gather the information - either through personal interviews or focus groups - need not have an MBA in marketing, or any experience at doing market research. Worksheets are provided in each section of this manual and there is a complete guide to doing focus groups included for those who may be doing them for the first time.

For clarity's sake, the various types of golf courses that will be mentioned throughout this manual are defined below:

- Public fee course: A golf course that is open to public play for a designated fee.
- Semi-Private course: A golf course that is open to public play for a designated fee and also offers memberships
- Private course: A course that does not accept any public play and is available only to members.
- Resort course: A course that offers play to lodging guests for a fee. Resort courses may also offer public fee play and/or memberships.
I. Basic Market Study Information Necessary for all Golf Course Owners

A. Economic Data on the Market Area

Perhaps a golf course owner's worst nightmare is to build a new golf course or operate an existing course in the midst of a residential area in which home sales are declining and homeowners are moving to other parts of the city. Factors which impact this kind of movement include the following:

- Movement of major new corporations into an area
- Migration of businesses from a downtown core to a more rural setting
- Development of new residential communities in another part of the city

Such trends in the market place can have a profound impact on new or existing golf courses. Economic data can help predict these trends by providing "big picture" information. Data provides a "macro" rather than a "micro" look at the market place. It is usually very general in nature and can be obtained through sources like the Chamber of Commerce, a local economic development board or a city mayor's office. Much of the information will be available in print form, either through city brochures or annual reports. It can also be gathered in the interviewing process with representatives of the various groups listed below.

* Local Chamber of Commerce
Local chamber directors or presidents will know about major corporations the city is courting or those looking to move to the area. They will also have some historical facts on the area including population growth facts and unemployment percentages. A local chamber can also provide a listing of the major companies and/or employers within the community.
Residential Real Estate Broker
Because proximity to residential developments housing potential golfers is critical to the success of a golf course, a knowledgeable, experienced real estate broker should be interviewed. Using a map, the broker should be asked to pinpoint major residential areas within a convenient proximity to the golf course site. Have the broker list the number of houses within the developments and the price range of the houses. Also have the broker list and circle any new housing developments that may be planned for the area. This information should serve to reinforce and confirm the demographic data that showed number of households and household incomes. Through their association with existing and future home buyers, the real estate professional could also help identify new course members. Question the broker as to volume of home sales over the past few years and trends in residential real estate.

Bank President of a Major Area Bank
Bank presidents usually serve on area chambers of commerce and help encourage new corporations and industries to move into an area. They can provide insights into the health and prosperity of the local economy based on new individual accounts opened, overall deposits and new businesses seeking their financial services.
EXAMPLE OF ECONOMIC DATA
The following is an excerpt from a market study done recently in Cincinnati, Ohio:

The City of Cincinnati

* The City of Cincinnati is located in Hamilton County, in southwestern Ohio, along the Ohio River. The Greater Cincinnati Consolidated Metropolitan Statistical Area (CMSA) has a population of 1,744,124 with a projected growth to 1,978,600 by year 1999. The average household income in the city in 1993 was $43,500, well above the national average household income.

Cincinnati was named "America's Most Livable City" by Places Rated Almanac in 1994. Residents enjoy the city's cultural advantages combined with a low crime rate, a sound educational system and excellent health care facilities. Six Fortune 500 industrial and 10 Fortune 500 service companies are headquartered in the area. Major employers include GE Aircraft Engines, Proctor & Gamble, the Kroger Company and the University of Cincinnati. The city has over 800 firms that are engaged in international trade and generate sales volumes of about $4 billion.

* Much of the growth in Cincinnati, both residential and commercial is found in Warren County, approximately 20 miles northeast of downtown Cincinnati. A recent article in the Cincinnati daily newspaper listed the following new commercial developments in Warren County:

- Proctor & Gamble will open a $280 million Health Care Research Center in July of 1995, employing more than 1,000 employees who will conduct research on over-the-counter products and pharmaceuticals.

- Governor's Pointe, an office park not far from the P&G site, will be the location of a new $27 million office center on 50 acres for Community Mutual, opening in July of 1996. The completed project will bring 800 employees from Community Mutual's other locations.

- Next to the Community Mutual site, Financial and Allied Credit Services (FACS), a division of Federated Department Stores, has a 25-acre site serving 11 million credit card holders. They employ 2,100 people at that site.

- The article stated that plans for this area include construction of a major
hotel to serve these corporate entities that are moving to the area.

- Other major employers currently found in Warren County include:

<table>
<thead>
<tr>
<th>Corporation</th>
<th># Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cintas Corporation</td>
<td>791</td>
</tr>
<tr>
<td>Worthington Industries</td>
<td>553</td>
</tr>
<tr>
<td>Cincinnati Electronics</td>
<td>418</td>
</tr>
<tr>
<td>Legget &amp; Platt</td>
<td>416</td>
</tr>
<tr>
<td>Leblong Makino</td>
<td>279</td>
</tr>
<tr>
<td>Portion Pac</td>
<td>279</td>
</tr>
<tr>
<td>Mitsubishi Electronic</td>
<td>228</td>
</tr>
</tbody>
</table>

* According to the Cincinnati statistics and city professionals interviewed, the city has a very healthy, diverse economy, particularly in the northeast sector. All indications point to continued steady growth. There appears to be no potential negatives in the existing and future direction of the Cincinnati economy that would prove detrimental to the development of a new golf course or negatively impact any existing golf courses.
B. Site Analysis

In objectively analyzing the strengths and weaknesses of a potential or existing site, the following should be considered:

* **Ease of Access**
  
  *One of the greatest advantages a new golf course can have is to be conveniently located near a major thoroughfare.* Not only does that contribute to golf course accessibility, but easy visibility creates greater awareness of the course and makes for inexpensive advertising. Traffic pattern reports are significant to a course study and are readily available through the same kinds of demographic services that will be discussed below.

* **Proximity to Residential Areas and Downtown Core**
  
  Analyze the distance from the golf course site from primary residential areas as well as from the downtown core as a point of reference. The distance can be measured in miles, drive time, or both.

* **Topography of Site's Terrain**
  
  A description of the site itself should include any interesting or unusual aspects about the property such as the presence of ponds, streams, trees or foliage. Whether the property is flat or has some rolling terrain should be mentioned as well.
EXAMPLE OF SITE DATA

The Stonegate Country Club

The Stonegate Country Club and residential development is located on 536 acres of land in Dallas County, forty-five miles northwest of downtown Dallas. The site is conveniently located off Highway 544, just north of the North Dallas Tollway.

The Stonegate golf course was opened in February 1992 and the design of the course has taken advantage of the beautiful rolling terrain found in this northern part of the city of Dallas. There are a number of man-made ponds on the course and the architect designed the course to take advantage of the trees and foliage originally found on the property.

The Stonegate housing development surrounds the golf course and consists of 300 single family lots, 150 of which have already been sold and 80 homes ranging in price from $200,000 to $450,000 have been built. Lot sales have averaged 12 per month in the first full year of home sales. Independent realtors consulted believe the property can maintain such sales velocity through sellout. Within a five-mile radius of the site there are four other major residential developments with approximately 3,500 homes ranging in price from $150,000 to $1 million. None of the other developments have golf courses or any other recreational amenities for the residents.
C. Demographics

While there are a number of major demographic services that provide reports to consumers, most of them are based on the most recent census data. The sample report shown in Exhibit A is a "full report" from Equifax National Decision Systems. Their data is updated twice annually by the Wharton Economic Forecast Association (WEFA). Reports can be ordered by simply calling the service and giving them the geographical area to be researched. Geographical data given to the demographic service can be in a number of forms. The researcher should choose the form which best defines the market area that will be most pertinent for their purposes. For instance, the geographical data can be described using the following entities:

- A radius around the site location for as little as one-half mile or as much as fifty miles
- Zip coded areas can be searched
- Census tracts can be searched
- If an area is bounded by a body of water, a map can be sent to the service and precise boundaries can be searched, deleting the non-populated areas.

While the perimeters of every primary target market area will vary based on various factors (location of competition, convenience to residential areas, etc.), there has been research done to determine the most frequently traveled distances by golfers to the courses they play. The National Golf Foundation (NGF) in a 1994 study called "Golf Consumer Profile" found that golfers will travel approximately:

- 12.4 miles or 18.6 minutes one way to get to the course they most frequently play
- 26.8 miles or 36.3 minutes one way to a good course they would regularly
• 48.5 miles or 61.7 minutes one way to get to a good course that they occasionally play.

It is therefore recommended that if a researcher has not yet defined a "primary market area", the best way to begin is by researching the 12.4 mile radius proven to be a convenient drive distance for the majority of the golfers.

Once a demographic report is obtained (see Exhibit A), the following are the facts pertinent to golf course markets within the report:

• Population - The population statistics identify the density of residents within the target market area. Good signs are positive historic growth ("Growth 1980 - 1990") and positive projected future growth ("1999 Projection").

• Households - Because the population statistics above reflect total population regardless of age, it is always helpful to look at total number of households. Not only is the present number of households important, but the historic and future projected growth rate are also pertinent and should be consistent with the historic and future growth statistics found in "Population" above.

• Households by Income - In looking at the household income levels, again it is beneficial to refer to some of the most recent research done by the NGF. In their 1995 study entitled, "Golf Participation in the United States" they determined that the average "Core Golfer" (defined as "Individuals aged 18 years or older who played at least 8 rounds of golf in 1994") is 45 years old and has a household income of $58,100. The average household income for the Beginning Golfer Population,
according to the NGF study, was $52,000.

Therefore in looking at the demographic report, the most important income level is that of household incomes of $50,000+ in considering primary target market for golfers.

In that same study the NGF found that the "national participation rate for golfers over the age of 12" to be 11.4 percent, with a variation from region to region within the United States.

Applying the average participation rate (or a more precise regional rate that can be obtained through the NGF) to the population figures of those who are twelve years of age or older, will produce an estimate of the potential number of golfers within the market.

- Population 16+ by Occupation - This portion of the report is used to gain some insights into the primary occupations of the individuals within the market. In general, those within the "Executive and Managerial" and "Professional Specialty" areas are at higher salary levels and therefore could more readily afford golf.

Exhibit B shows a standard traffic volume map that can also be ordered through a demographic service like Equifax National Decision Systems. Such a report is essential in analyzing primary traffic flow in and around a golf course site. The information can be used for optimal signage positioning as well as for determining primary entrances to property.

D. Competitive Study
An in-depth competitive study should include information on all public, semi-private, private and resort courses within the area. Information on municipally owned public fee courses is available through the offices of the municipality and are a matter of public record. The researcher should visit all golf facilities to get an idea of the age and quality of the clubhouse and the facilities offered. Play the golf course, if possible. Unfortunately, management at many of the privately owned courses do not feel obligated to divulge much of the pertinent information required below. Also, they may only allow member play on the course. If the data is not readily available from a site visit, the researcher can contact the golf course manager directly and tell them a competitive study is being done. Offer to share the data collected in the competitive study in exchange for information on the course.

The following is an outline of the data that should be collected for the various kinds of courses:

- **Public Fee Courses**
  
  Pricing on green fees including seasonal and time-of-day price differences if offered. If different, include fees for senior and junior golfers as well. Make note as to what the cart fee is and if it is included in the quoted green fees. Note the caddie fees, if available. Ask the head golf professional for the total amount of 18 hole rounds played on the course annually.

- **Semi-Private Courses**
  
  Obtain the same information listed above for the public fee courses as well as the types of membership the course offers. These may be annual memberships, where an annual fee is paid and the member pays no green fees, only cart fees when he plays. The memberships may involve a one-time "initiation fee" and monthly dues rather than an annual fee. Ask what member privileges include. These vary from course to course but usually include membership in a Men’s Golf Association (if they have one), maintenance of the members' handicap, and the ability to reserve tee times in advance of the general public.
• Private Courses

Data gathered on a private golf course should include the number of members and membership pricing for all categories of memberships. Private clubs usually request a one-time initiation fee which may be refunded or transferred when the member resigns. In addition, there may also be a stock purchase required that will give the member voting rights. The stock is usually sold or transferred upon member resignation. Members are also required to pay either monthly or annual dues. Make note of any additional mandatory fees the members must pay (food and beverage minimums, assessments, capital improvement fees).

If possible, information should be obtained on how many rounds are played annually on the course and if golf outings are accepted by the private course.

• Resort Courses

Resort courses vary widely as to the type of play offered. The primary revenue generator for most resorts is room revenue and the ancillary expenditures (food, meeting room usage, pro shop expenditures, etc.) that the guests generate. Therefore most resorts give top priority to resort guests and make certain they can get tee times. Resorts generally have two types of guests that have different playing patterns: the corporate or meeting guest who meets in the mornings and has afternoon tee times and the social or vacationing guest who usually plays on the weekends. Most resorts generate additional revenue by offering memberships and/or allowing public fee play to take up the unused tee times.

The type of information gathered for the resort courses can include the same information that would be gathered for a public fee or semi-private course,
depending upon the resort's golf offering.

- Other general information to be gathered for each course researched
  - Notes should be taken on the food and beverage concept offered (snack bar vs. full dining room) and menus should be obtained for price comparison. Using either the luncheon or dinner menus (or both), compare the price of a fish, chicken and beef entree item. This will provide a look at the low-to-high price range among the food and beverage operations of the courses researched.
  - Outing package information (usually includes green fees, cart fees and a Pro’s fee) should be gathered and some estimate of numbers of outings the course hosts.
E. Interviews and/or Focus Groups

The interview portion of the market study will be the most revealing and informative part of the study. A researcher looking into the possibility of a new golf course may discover the location, the demographic report and the lack of existing competition in an area all point to a potentially good market for a new club. He may then discover in talking to a real estate broker that there are plans for a new development including a golf course within close proximity of the researcher's site that could prove to be formidable competition. When it comes to interviewing prospective or existing golfers for a golf course, keep in mind that the highest form of flattery is to ask someone their opinion. The researcher will find that no compensation is necessary or expected - business people understand the necessity of research for success. Most professionals want new and existing businesses to prosper, for prosperity breeds success for others.

Professionals that should be on the researcher's interview list should include:

- Bankers
- Residential real estate brokers
- Chamber executives
- Local corporate executives
- City officials
- Other developers
- Local hotel managers
- Area golf professionals

Most importantly, interview a wide variety of golfers representing a mixture of ages, caliber of play, length of time in playing the game, household income and executive status.

While some of the questions pertinent to professionals listed above were mentioned in the "Economic Data" section earlier in this manual, other questions and issues that should be explored with those interviewed (depending upon profession and/or area of expertise or interest) include:

- Does the individual play golf? If so, how often and on what courses?
• Which course is played most frequently and why?
• How are area courses perceived in the area in terms of playability of the course, quality of the facility, service and attitude of the staff?
• Does the individual perceive a need for a new golf course in the area? If so, why? If not, why not?
• Does the individual have any suggestions for any unmet needs or expectations of area golfers in terms of a new golf course (i.e., more extensive golf instructional programs, availability of caddies)?
• Can the individual think of any others that should be interviewed that would be particularly knowledgeable or opinionated on the need or lack of need for a new golf course?

Interviews can be done on a one-on-one basis or in a focus group format. Details on how to organize and implement focus groups are found in the "Focus Group" section of this manual. It should be understood that some of the professionals interviewed will be those whose time is valuable. Offering to take them to breakfast or lunch in exchange for their time is an offer few can turn down. The same is recommended for the focus group format. People do break for lunch and those focus groups that are scheduled around a breakfast or luncheon scenario are often the best attended, particularly when the participants are promised they will be kept no longer than an hour to an hour and a half.

A word of caution on interview bias. Researchers should always "consider the source" in the interviewing process. For instance, another developer who may one day wish to build a golf course within the community might be particularly negative on the idea of the researcher's proposed course. Conversely, a golfer who may be playing public fee courses currently and have his name on a three year waiting list for a private club membership may be ecstatic about another playing option in the community. But does he know other golfers who would also support the new course and more importantly, what is the length of the waiting list for the other clubs in the
city. If concerns or negatives emerge in one interview, question the next individuals as to those concerns or negatives and see if others concur or differ in opinion. The interviewer will find that after interviewing a good objective cross section, a consensus of opinion will predominate on various issues and questions.
F. Overall Analysis of Data Gathered

Once the researcher has completed the basic market study, he or she should have a good idea of the strengths or weaknesses within the market place that could affect a new golf course. The following illustrates some of those strengths and weaknesses that might be discovered and how they might impact the success of a new golf course.

Economic Data Results:

*Healthy economic indicators should always be present prior to proceeding with a new business venture.* Good economic signs point to a strongly diversified economy, where new and different kinds of corporations are moving in and flourishing. Real estate sales should be at least "moderate" or "steady" and the unemployment rate should be no higher than the national average.

Some economic negatives that should be regarded as "red flags" for a new course would be indications that major corporations in the area are cutting back or downsizing. Such actions create a great deal of skepticism in the market place, and disposable income spent on activities such as golf is obviously reduced. It stands to reason that when corporations reduce their staff, the real estate market is adversely affected by this job instability.

Demographic Report Indications:

After determining the convenient mileage radius for the target market (more or less than the 12.4 mile radius mentioned above), the NGF participation average of 11.4 percent should be applied to the population aged 12+ to determine how many prospective players are present. Using the NGF average of 20 rounds applied to the 11.4 percent base of golfers participating in the game on an annual basis, the researcher can determine how many rounds the market can produce.
Example:
The Equinox National Decision Systems demographic report shows that the total population in a 12.4-mile radius around a site is 50,000. It shows that 78 percent (39,000) of that population is over 12 years of age. Applying the 11.4 percent participation rate shows that 4,446 individuals should be golfers. NGF research also shows that those 4,446 golfers should play an average of 20 rounds per year or a total of 88,920 rounds.

Competitive Study Findings

Once the total number of potential rounds in the market is determined, see how many of those rounds are being played on existing competitive courses. The researcher should not rely solely on this mathematical exercise, as there should be other key indicators in the market place if there is truly a need for a new course. Key indicators in a competitive study will be public fee courses that are accommodating the maximum number of rounds possible per year and/or private clubs that have full golf memberships with healthy waiting lists.

Findings from Interviews:

If there is a need for another new course, professionals and golfers interviewed will confirm it. Golfers will mention the crowded conditions of the public fee courses and the inability to get tee times (and not just on Saturday mornings between 8:00 a.m. and 10:00 a.m.). Private club members will describe their golf memberships as nearing capacity or better yet, as having waiting lists of people wanting to join. When asked if they would proceed with the construction of a new course if it were their investment dollars being spent, professionals will be very honest and objective with their response.

If current golfers' needs are being met and existing courses are not nearing capacity, a new
Other Indicators:

Beyond indicating presence or depth of potential market, the study can demonstrate such things as the following:
A strong family interest in recreational activities and facilities indicating the need or potential popularity of a family-oriented country club offering well-rounded family activities and programs

- A large population of retirees who may be a good source of early morning weekday play
- Numerous corporations that could be prospective members or sources of corporate outings
- A need for a good golf instruction program for beginning juniors or golfers of any caliber

*All markets are unique.* The previous pages of this manual have outlined the various information searches that can arm a golf course owner with the information he needs to compete effectively and efficiently in the market place. The following pages provide specifics for owners of various
kinds of courses.
WORK SHEETS
FOR MARKET STUDIES ON ALL
POTENTIAL NEW GOLF COURSES

** Please note that most of the data covered in these initial work sheets will be data collected for market studies on all other golf courses. However, each golf course section contained in this manual has a complete set of work sheets for each individual kind of course discussed.
ECONOMIC DATA

1. What is the total population of the city?

______________________________________________________________

2. What are the areas of greatest growth in and around the city?

______________________________________________________________

3. Where is the growth coming from - new movement into the city or existing residents "shifting" to new parts of the city for upgrading purposes?

______________________________________________________________

4. In what area of the city do the greatest number of professionals work?

______________________________________________________________

5. In what area of the city do the greatest number of professionals live?

______________________________________________________________

6. Who are the major employers in the city?

______________________________________________________________

7. Are any major corporations moving into or out of the area?

______________________________________________________________

______________________________________________________________

• What is the unemployment rate for the city?

______________________________________________________________

9. Is there one primary industry or corporation supporting the economy or is it diversified?

______________________________________________________________

10. Given the research gathered on the overall economy, is it anticipated to get worse, stay about the same or steadily improve over the next five years?

______________________________________________________________
11. Was there any specific economic negatives or positives that could impact a new or existing golf course found in the research?
SITE DATA

1. Site size in acreage: _________________________________________________

2. Topographical features of property: ___________________________________

3. Proximity (in drive time or miles) of property to downtown areas and major residential areas:
   ___________________________________________________________________

4. Major highways or heavily trafficked streets bounding or within close proximity to site?
   ___________________________________________________________________

5. Traffic counts (obtained from traffic count reports) for the streets listed above:
   ___________________________________________________________________

6. If golf course is in a residential development:
   • How many total homes will be built in development ______
     - How many homes are currently built ______
       sold _____ occupied _____
   • What has been the annual absorption rate or annual volume of sales in the development
     ___________________________________________________________________
   • What is the price range of the homes and the average price of the homes sold: Range __________ Average home price sold ______
   • What is the profile of the buyers (retirees, families w/college age children, families with young children, empty nesters, a combination of all of these)
7. Make a list of the following for each of the primary residential developments within a 12.4 mile radius of the golf course

- Name of development and developer
- Sales volume of homes in development
- Profile of home owners
- Number of homes
- Price range of homes

8. Make a list of any proposed new developments and if available, obtain the following information:

- Number of proposed homes to be built in the development
- Recreational amenities proposed for the development
- Price range of homes
- Targeted profile of buyers
DEMOGRAPHIC DATA

Primary Data To Be Obtained from a Demographic Report:

1. Demographic Area Searched (mileage radius, zip codes, census tracts, etc.):
   ____________________________________________________________

2. Total population of area: ____________________________________
   ____________________________________________________________

3. Historic population growth (usually given between 1980 and 1990 census):
   ____________________________________________________________

4. Projected population growth (usually given for next five years; sometimes in percentages rather than in raw numbers):
   ____________________________________________________________

5. Total no. of households: ____________________________________
   ____________________________________________________________

6. No. of households with household incomes in excess of $50,000: ________
   ____________________________________________________________

7. Population aged 12 years or older: ______________________________
   ____________________________________________________________

8. Regional golfer participation rate obtained from NGF: ______________
   ____________________________________________________________

9. Potential Golf Rounds for Market Area:
   Regional golfer participation rate from NGF X Population aged 12+ X Average of 20 rounds per golfer:
   ____________________________________________________________
COMPETITIVE STUDY

Competitive information should be obtained through site visits to all public fee, semi-private, private and resort courses so as to get a visual comparison of the quality of the course, the Pro Shop, etc. Information can also be obtained through phone interviews or from a golfer or member who frequents the course.

Ideally, the following information should be obtained for the various kinds of courses:

Public Fee Course:

Name of course:__________________________________________________________

Course owner:____________________________________________________________

Opening date of facility: __________________________________________________

No. of Holes of Golf:_______________________________________________________

Length of course(s):________________________________________________________

Course designer(s):_________________________________________________________

Facility description (include building size, type of food and beverage operation, pro shop operations, list other amenities such as driving range, banquet rooms, etc.):
________________________________________________________________________
________________________________________________________________________

Pricing Information:

- Winter green fees (winter season months?) - Weekday/Weekend
- Summer green fees (summer season months?) - Weekday/Weekend
- Morning/Afternoon rates
- Senior/Junior rates
- Cart Fees and Caddie Fees (if offered)

Totals of 18 rounds played for each of the prior three years:

1995 Rounds___________
1994 Rounds
1993 Rounds

No. of Golf Outings hosted by the Public Fee Course in the prior year?
**Semi-Private Golf Course:**

Name of course: ____________________________________________________________

Course owner: ______________________________________________________________

Opening date of facility: _____________________________________________________

No. of Holes of Golf: _________________________________________________________

Length of course(s): _________________________________________________________

Course designer(s): _________________________________________________________

Facility description (include building size, type of food and beverage operation, pro shop operations, list other amenities such as driving range, banquet rooms, etc.):
___________________________________________________________________________
___________________________________________________________________________

Pricing Information:

- Winter green fees (winter season months?) - Weekday/Weekend
- Summer green fees (summer season months?) - Weekday/Weekend
- Morning/Afternoon rates
- Senior/Junior rates
- Cart Fees and Caddie Fees (if offered)

Membership Information:

- Membership categories offered (individual, couple, family, senior, etc.)
- Membership privileges of each category - What does membership include?
- Pricing of each membership category
- No. of Members in each category
- Is there a cap on total number of memberships accepted?
- What is the profile of the majority of the members (retirees, couples, mostly men, etc.)?

Total of 18 hole rounds played each of the last three years? If possible, break the total rounds out by number of rounds played by members versus public fee play.
<table>
<thead>
<tr>
<th>Year</th>
<th>Member Rounds</th>
<th>Public Rounds</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1995</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>1994</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>1993</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
</tr>
</tbody>
</table>
Private Golf Course

Name of Golf Course: ___________________________________________________________

Course Owner: ___________________________________________________________________

Opening date of facility: _________________________________________________________

No. of Holes of Golf: _____________________________________________________________

Length of Course(s): _____________________________________________________________

Course designer(s): _______________________________________________________________

Facility description (include size of building, number and types of food and beverage operations, pro shop operations, and list any other amenities such as driving range, swimming pools, tennis courts, athletic facilities, etc.):
_____________________________________________________________________________
_____________________________________________________________________________

Membership Information:

• List all membership categories offered and their membership privileges
• Note the fees for each category, including the initiation fee, dues, stock, etc. Break out which of these fees are refundable upon resignation
• Specify any additional mandatory fees the member must pay such as food and beverage minimums or capital assessment fees
• Obtain the total number of members and the number of members in each category
• Inquire as to a membership "cap" or total number of members the club will accept particularly in the golf category of membership
• If the club has a waiting list of members who are waiting to join, inquire as to the number of people on the list and the anticipated waiting time for them
• Inquire as to numbers of new members the club brings in each year
• Also inquire as to the numbers of members the club loses through attrition each year

Other Information:

Does the private course accept golf outings? _____________________

• How many 18 hole rounds of golf were played on the course: 38
<table>
<thead>
<tr>
<th>Year</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1995</td>
<td></td>
</tr>
<tr>
<td>1994</td>
<td></td>
</tr>
<tr>
<td>1993</td>
<td></td>
</tr>
</tbody>
</table>
Resort Golf Course

Name of Resort: ___________________________________________________________

Resort Owner: ___________________________________________________________

Date Facility Opened: _______________________________________________________

No. of Holes of Golf: _______________________________________________________

Length of Course(s): _______________________________________________________

Course Designer(s): _______________________________________________________

Resort Description (include size of buildings, no. of lodging rooms, town homes, etc., number and types of food an beverage operations, pro shop operations, and list any other amenities such as driving range, swimming pools, tennis courts, athletic facilities, etc.):
________________________________________________________________________
________________________________________________________________________

Total Golf Course Rounds (resort guest rounds/outings/public fee/members):

<table>
<thead>
<tr>
<th>Year</th>
<th>Resort Guest</th>
<th>Outings</th>
<th>Public Fee</th>
<th>Members</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1993</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>Total</td>
</tr>
<tr>
<td>1994</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>Total</td>
</tr>
<tr>
<td>1995</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>Total</td>
</tr>
</tbody>
</table>

Annual Room Occupancy Level: ______________________________________________

Additional Data:

If Resort Course offers public fee play:

- Winter green fees (winter season months?) - Weekday/Weekend
- Summer green fees (winter season months?) - Weekday/Weekend
- Morning/Afternoon rates
- Senior/Junior Rates
- Cart Fees and Caddie Fees if offered

If Resort Course offers memberships:

- Are they annual memberships or memberships with initiation fees and dues?
- What are the various categories of memberships, their privileges and their prices?
• How many members are there in each category of membership?
• Is there a cap on total golf memberships sold?
• What is the profile of the majority of the members?
INTERVIEW SHEETS

Please refer to the "Interviews and/or Focus Groups" section of the manual for suggestions on who to interview and questions to ask in the interview.

Name: ____________________________________________

Company: __________________________________________

Title: _____________________________________________

Golfer: Yes _____ No _____

Course(s) most frequently played: _______________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Details of Interview:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
SUMMARY OF MARKET STUDY DATA

Economic Data:

List all negatives facts learned:

List all positive facts learned:

Other pertinent data learned:

Site Data:

List all negatives concerning the site:

List all positives concerning the site:

Other pertinent data concerning the site:

Competitive Data:

List which are considered "strongest" competition and why:

List which are considered "weakest" competition and why:

List all prospective or planned new competition and their potential threat to the golf course:

Interviews and/or Focus Groups:

Negatives learned:

Positives learned:

Other major points learned:
II. Market Study Information Specific to Operating Courses

Just as owners of operating golf courses prepare an annual budget as a guideline for the financial operations of the golf facility, they should also update the market study information on an annual basis. Each year, major changes in the market place, such as new competition, new residential real estate developments and corporate movement can have a profound effect on golf courses. Market studies insure there will be no devastating surprises or lost opportunities for the golf course owner.

Once the initial market study, as outlined in Section I of this manual, is complete, the annual update will prove to be much easier, less time-consuming, and just as valuable. If a club has been operational for at least a year, there are some additional facts that should be gathered that will provide some marketing insights and serve as annual benchmarks for the study. It is therefore recommended that owners of operational golf courses complete Section I of this manual and then go on to gather the following data for the various kinds of operational courses outlined below.

It is important that the golf course owner or researcher gathering the information meet with key personnel or board members to see if there are specific concerns they might want studied during the research process. They may want to take advantage of the researcher finding out such things as:

- Would golfers use a night driving range?
- Is there interest in the formation of a Women’s Golf Association or extended Junior Golf Programs
- Would golfers take advantage of a Saturday breakfast buffet?
Their questions and concerns should be incorporated into the interview process and then checked against competitors’ offerings.
A. The Public Fee Course

Tracking of certain kinds of information will be critical in discerning seasonal activity, measuring advertising successes, and gauging overall golf course progress. That pertinent information includes:

**Tracking Golf Rounds**

Golf rounds should be tracked on a daily basis and coded as to the differing fees charged, for example regular golf round, junior round, senior round, afternoon round. Graphing this information will help identify the "peaks and valleys" of usage and facilitate putting together a marketing plan to program for the valleys and take advantage of the peaks.

**Identifying Source of Golfers**

Identifying where your golfers are coming from is very important. This will involve the golf shop staff asking for the residential zip code of each golfer as they check in and pay their green fees. This system is important enough to establish it as a regular part of the check-in procedure.

Using a large zip-coded map of the area (obtained through an office supply store or local post office), create a "scattergram." Use a pin to represent each golfer and place pins in the appropriate zip-coded area where the golfer lives. This scattergram can be a powerful indicator of what the primary market area is for the golf course and how far golfers are coming to play the course. Once the primary zip codes are identified, demographic reports on each individual zip code can be ordered and the depth of market within each can be measured. Those that demonstrate particularly strong numbers of potential golfers, but minimal response in the zip code scattergram, should be targeted for advertising
campaigns. If those same zip coded areas are showing good market penetration represented by significant numbers of pins in the scattergram, the owner can be assured he is indeed reaching his market.

**Tracking Group Outing Data**

Group outing data should be tracked, making note of the following:

- How they came to know the course and book their outing
- The date of the booking
- Size of the group
- Pricing and package offered the group

Once again, such tracking will show emerging trends related to group outings.

After the outing, the coordinator should be given a satisfaction questionnaire asking how the facility performed in various areas. Such a questionnaire will not only provide insights into how the facility can better serve golfers, but the coordinator will know the facility is serious about satisfying their needs. The questionnaire should ask the coordinator to rank on a level of 1 to 4 (with 1 being "excellent", 2 being "good", 3 being "fair" and 4 being "poor"), the friendliness of the Pro Shop staff, the efficiency of the Pro Shop staff, the quality of the food and beverage served and any other questions important to the facility. Questions such as "How did you hear about the facility?" and "Do you plan to host future outings at the facility?" should also be asked.

Prepare a simple follow-up evaluation questionnaire and have the group outing coordinator fill it out following the outing. Provide a self-addressed, stamped
envelope for the coordinator's use. This questionnaire should also ask questions such as:

- “How many golf outings do you anticipate having annually?”
- Would you recommend the course to others who may be hosting outings?
Analyzing the Food and Beverage Operation

Regardless of its size or dimension, the food and beverage operation of a golf course should be analyzed annually as a source for future revenues. A good exercise would be to track what most diners are ordering in a given month. Experiment with diversifying the menu and then analyze whether the new items are being ordered. Use comment cards and invite diners to fill them out with suggestions or comments concerning the food and beverage operation.

Interviewing the Golfers

While gathering all the facts that lay the foundation for the study, golf course owners will find talking directly to their golfers to be the best source of information. It is recommended that at least 20 to 30 of the golfers who frequent the course be interviewed. The format of those interviews can be one-on-one interviews with golfers following their rounds, phone interviews, or organized focus groups. As mentioned previously, the best way to catch a busy individual is for lunch. The same applies to the focus groups as they will be better attended if a meal is offered.

As to the source of the golfers to be interviewed, the Golf Professional should be the best source of who those individuals should be. Seek a good cross section - everyone from very frequent to infrequent golfers, from juniors to seniors - and include a good mixture of men and women.

Typical questions that should be asked in the interviewing process:

- How frequently do you play golf?
- What other courses do you play and why?
- Why do you play our course - what is it about the course that attracts you?
• How do you think our golf facility compares to other facilities in the area (the comparison should query as to image, quality of course, quality of food and beverage facility, attitude and service of staff, price, ease of getting to the course and getting on the course)?

• If you owned this golf facility, what would you do differently, do more of, do less of, etc.?

• Do you have any other suggestions for us?

• Can you suggest any other golfers we should interview as we gather our opinions on our golf course and other courses in the area?

**Overall Analysis of Data Gathered**

After gathering all of the data using the work sheets provided and incorporating the interview information, the following should be done:

• A comparison should be made with the previous year's data. Any fluctuation or major changes should be analyzed and explanations sought.

• The data should be shared with the other key personnel, particularly those who stated some specific questions or concerns to be researched before the study began.

• Discuss what the data means. Questions should be asked as to whether changes in the data were resulting from market conditions or specific actions taken by the facility's staff to impact change. For instance, the scattergram may reveal 10 percent more golfers were generated from a zip-coded area that had not been represented the previous year. That change could either be a result of word-of-mouth marketing, direct advertising done within the zip coded area by the facility,
or strong growth that occurred in the area over the past year.

- *Most importantly, the data should be incorporated into the budget and business plan for the golf facility for the upcoming year.*
WORK SHEETS
FOR MARKET STUDIES ON
PUBLIC FEE COURSES
ECONOMIC DATA

1. What is the total population of the city?

2. What are the areas of greatest growth in and around the city?

3. Where is the growth coming from - new movement into the city or existing residents "shifting" to new parts of the city for upgrading purposes?

4. In what area of the city do the greatest number of professionals work?

5. In what area of the city do the greatest number of professionals live?

6. Who are the major employers in the city?

7. Are any major corporations moving into or out of the area?

8. What is the unemployment rate for the city?

9. Is there one primary industry or corporation supporting the economy or is it diversified?

10. Given the research gathered on the overall economy, is it anticipated to get worse, stay about the same or steadily improve over the next five years?
11. Was there any specific economic negatives or positives that could impact a new or existing golf course found in the research?
SITE DATA

1. Site size in acreage: ______________________________________________________

2. Topographical features of property: _________________________________________

3. Proximity (in drive time or miles) of property to downtown areas and major residential areas:
   _______________________________________________________________________

4. Major highways or heavily trafficked streets bounding or within close proximity to site?
   _______________________________________________________________________

5. Traffic counts (obtained from traffic count reports) for the streets listed above:
   _______________________________________________________________________

6. If golf course is in a residential development:
   - How many total homes will be built in development _____
   - How many homes are currently built _____ sold _____ occupied _____
   - What has been the annual absorption rate or annual volume of sales in the development:
     What is the price range of the homes and the average price of the homes sold:
     Range _____________ Average home price sold _______
   - What is the profile of the buyers (retirees, families w/college age children, families with young children, empty nesters, a combination of all of these)
     _______________________________________________________________________

7. Make a list of the following for each of the primary residential developments within a 12.4-mile radius of the golf course
   - Name of development and developer - Number of homes
   - Sales volume of homes in development - Price range of homes
   - Profile of homeowners

8. Make a list of any proposed new developments and if available, obtain the following information:
   - Number of proposed homes to be built in the development

55
• Recreational amenities proposed for the development
• Price range of homes
• Targeted profile of buyers
DEMOGRAPHIC DATA

Primary Data To Be Obtained from a Demographic Report:

1. Demographic Area Searched (mileage radius, zip codes, census tracts, etc.):

   _________________________________________________________________________

2. Total population of area:____________________________________________________

3. Historic population growth (usually given between 1980 and 1990 census):

   _________________________________________________________________________

4. Projected population growth (usually given for next five years; sometimes in percentages rather than in raw numbers):

   _________________________________________________________________________

5. Total no. of households: ________________________________________________

6. No. of households with household incomes in excess of $50,000: _______________

7. Population aged 12 years or older: _________________________________________

8. Regional golfer participation rate obtained from NGF: _________________________

9. Potential Golf Rounds for Market Area:

   Regional golfer participation rate from NGF X Population aged 12+ X Average of 20 rounds per golfer:

   _________________________________________________________________________
COMPETITIVE STUDY

Competitive information should be obtained through site visits to all public fee, semi-private, private and resort courses so as to get a visual comparison of the quality of the course, the Pro Shop, etc. Information can also be obtained through phone interviews or from a golfer or member who frequents the course.

Ideally, the following information should be obtained for the various kinds of courses:

Public Fee Course:

Name of course:________________________________________________________

Course owner:___________________________________________________________

Opening date of facility:__________________________________________________

No. of Holes of Golf:______________________________________________________

Length of course(s):_______________________________________________________

Course designer(s):_______________________________________________________

Facility description (include building size, type of food and beverage operation, pro shop operations, list other amenities such as driving range, banquet rooms, etc.):
_____________________________________________________________________
_____________________________________________________________________

Pricing Information:

- Winter green fees (winter season months?) - Weekday/Weekend
- Summer green fees (summer season months?) - Weekday/Weekend
- Morning/Afternoon rates
- Senior/Junior rates
- Cart Fees and Caddie Fees

Totals of 18 rounds played for each of the prior three years:

1995 Rounds - ___________________
1994 Rounds - __________
1993 Rounds - __________

No. of Golf Outings hosted by the Public Fee Course in the prior year?

________________________________________________________________________
**Semi-Private Golf Course:**

Name of course: ________________________________________________________________

Course owner: __________________________________________________________________

Opening date of facility: ________________________________________________________

No. of Holes of Golf: ____________________________________________________________

Length of course(s): __________________________________________________________________

Course designer(s): _____________________________________________________________

Facility description (include building size, type of food and beverage operation, pro shop operations, list other amenities such as driving range, banquet rooms, etc.):

______________________________________________________________________________

Pricing Information:

- Winter green fees (winter season months?) - Weekday/Weekend
- Summer green fees (summer season months?) - Weekday/Weekend
- Morning/Afternoon rates
- Senior/Junior rates
- Cart Fees and Caddie Fees (if offered)

Membership Information:

- Membership categories offered (individual, couple, family, senior, etc.)
- Membership privileges of each category - What does membership include?
- Pricing of each membership category
- No. of Members in each category
- Is there a cap on total number of memberships accepted?
- What is the profile of the majority of the members (retirees, couples, mostly men, etc.)?

Total of 18-hole rounds played each of the last three years? If possible, break the total rounds out by number of rounds played by members versus public fee play.
<table>
<thead>
<tr>
<th>Year</th>
<th>Member Rounds</th>
<th>Public Rounds</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1995</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1994</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1993</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Private Golf Course

Name of Golf Course: ____________________________________________________________

Course Owner:_________________________________________________________________

Opening date of facility:__________________________________________________________

No. of Holes of Golf: ____________________________________________________________

Length of Course(s): ____________________________________________________________

Course designer(s): ____________________________________________________________

Facility description (include size of building, number and types of food and beverage operations, pro shop operations, and list any other amenities such as driving range, swimming pools, tennis courts, athletic facilities, etc.):

____________________________________________________________________________
____________________________________________________________________________

Membership Information:

- List all membership categories offered and their membership privileges
- Note the fees for each category, including the initiation fee, dues, stock, etc. Break out which of these fees are refundable upon resignation
- Specify any additional mandatory fees the member must pay such as food and beverage minimums or capital assessment fees
- Obtain the total number of members and the number of members in each category
- Inquire as to a membership "cap" or total number of members the club will accept - particularly in the golf category of membership
- If the club has a waiting list of members who are waiting to join, inquire as to the number of people on the list and the anticipated waiting time for them
- Inquire as to numbers of new members the club brings in each year
- Also inquire as to the numbers of members the club loses through attrition each year

Other Information:

- Does the private course accept golf outings? ________________________________
- How many 18 hole rounds of golf were played on the course:
**Resort Golf Course**

Name of Resort: _______________________________________________________________

Resort Owner:    ________________________________________________________________

Date Facility Opened: ___________________________________________________________

No. of Holes of Golf: ___________________________________________________________

Length of Course(s): ___________________________________________________________

Course Designer(s): ___________________________________________________________

Resort Description (include size of buildings, no. of lodging rooms, town homes, etc., number and types of food an beverage operations, pro shop operations, and list any other amenities such as driving range, swimming pools, tennis courts, athletic facilities, etc.):
____________________________________________________________________________
____________________________________________________________________________

Total Golf Course Rounds (resort guest rounds/outings/public fee/members):

1993    resort guest ___  outings ___  public fee ___  members ___  Total _____
1994    resort guest ___  outings ___  public fee ___  members ___  Total _____
1995    resort guest ___  outings ___  public fee ___  members ___  Total _____

Annual Occupancy Level: ___________________________________________________

Additional Data:

If Resort Course offers public fee play:

- Winter green fees (winter season months?) - Weekday/Weekend
- Summer green fees (winter season months?) - Weekday/Weekend
- Morning/Afternoon rates
- Senior/Junior Rates
- Cart Fees or Caddie Fees if offered

If Resort Course offers memberships:

- Are they annual memberships or memberships with initiation fees and dues?
• What are the various categories of memberships, their privileges and their prices?
• How many members are there in each category of membership?
• Is there a cap on total golf memberships sold?
• What is the profile of the majority of the members?
INTERNAL INFORMATION ON THE PUBLIC FEE COURSE

Date Course Opened: ________________________________

Course Designer: __________________________________

Description of Facility: ______________________________

Strengths or Positives in comparison to competition:

________________________________________________________________________

Weaknesses or negatives in comparison to competition:

________________________________________________________________________

Primary residential zip codes
of golfers playing course: ______________________________________


No. of golf outings hosted during the year: _______________________

List advertising promotions done during the year and the resulting no. of golfers generated:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
INTERVIEW SHEETS

Please refer to the "Interviews and/or Focus Groups" section of the manual for suggestions on who to interview and questions to ask in the interview.

Name: ______________________________________________________________________

Company: ___________________________________________________________________

Title: _______________________________________________________________________

Golfer: Yes _____ No _____

Course(s) most frequently played:__________________________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

Details of Interview:

______________________________________________________________________________

______________________________________________________________________________

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______________________________________________________________________________
SUMMARY OF MARKET STUDY DATA

Economic Data:

List all negatives facts learned:
List all positive facts learned:
Other pertinent data learned:

Site Data:

List all negatives concerning the site:
List all positives concerning the site:
Other pertinent data concerning the site:

Competitive Data:

List which are considered "strongest" competition and why:
List which are considered "weakest" competition and why:
List all prospective or planned new competition and their potential threat to the golf course:

Interviews and/or Focus Groups:

Negatives learned:
Positives learned:
Other major points learned:
The Semi-Private Course

The Semi-Private Golf Course appeals to two types of players: the pay-for-play golfer and the golfer who wishes to have a membership allowing unlimited play. Like the Public Fee course owner, Semi-Private course owners need to begin with Section I. Gather the same information as the Public Fee Course Owner as well as the following:

**Internal Membership Data**

**Member Profile**

The membership application format is very important as it can provide a lot of demographic information valuable to the golf course owner. The application should request the following from the member applying:

- **Member name**
- **Spouses name (if couple or family membership)**
- **Home Address**
- **Work Address of Member and Spouse**
- **Home Phone**
- **Work Phone of Member and Spouse**
- **Birth date of Member**
- **Single/Married/Divorced**
- **Names and Birth dates of Children**
- **Title**
- **Employer**
- **Household Income Range**
- **Source of learning about course**

This data should be used to tabulate the professions (CPAs, attorneys, doctors, corporate executives, sales people, etc.) that are among the membership. A list should also be made of the major area companies represented among the membership. The average age of the membership should also be tabulated. The number and age of the members' children should be analyzed to determine what percentage of the membership has
children that might be potential participants in junior programs hosted by the golf course.

This information should be analyzed using the total base of members in the initial market study. Each year, an analysis should be done on only the newly joined members to ascertain if the course is getting members from different areas and ages, from other companies, and more.

Just as a scattergram of zip codes should be done on the public fee players, two separate scattergrams should be done for the Semi-Private Course's members' home and business zip codes to discover where the membership primarily lives and works.

Membership Totals

Numbers of new members brought in should be tracked on a weekly basis and graphed on a monthly basis. Once again, this will help pinpoint the seasonal trends of the area. The data should differentiate between the various categories of membership (senior, junior, couple, family, etc.) and the memberships sold in each. An additional graph should be done showing revenues brought in from the membership sales. An annual comparison of these graphs will clearly point out the membership progress or lack of progress for the golf course.

Tracking of Rounds

When tracking the numbers of golf rounds as suggested in the data gathered for the Public Fee Courses, a Semi-Private Course should differentiate between public fee rounds played and member rounds played.
Interviewing Process

Interviews should also be done for the Semi-Private Course, but one-third of all golfers interviewed should be members of the course.

Mail Satisfaction Survey

It is suggested that a mail survey be done to the base of members gauging their satisfaction level with the facility and their membership. The survey should also solicit suggestions from this group on how the facility might enhance memberships.
WORK SHEETS

FOR MARKET STUDIES ON

SEMI-PRIVATE GOLF COURSES
**ECONOMIC DATA**

1. What is the total population of the city?

2. What are the areas of greatest growth in and around the city?

3. Where is the growth coming from - new movement into the city or existing residents "shifting" to new parts of the city for upgrading purposes?

4. In what area of the city do the greatest number of professionals work?

5. In what area of the city do the greatest number of professionals live?

6. Who are the major employers in the city?

7. Are any major corporations moving into or out of the area?

8. What is the unemployment rate for the city? _________________________

9. Is there one primary industry or corporation supporting the economy or is it diversified?

10. Given the research gathered on the overall economy, is it anticipated to get worse, stay about the same or steadily improve over the next five years?
11. Was there any specific economic negatives or positives that could impact a new or existing golf course found in the research?
SITE DATA

1. Site size in acreage: _____________________________________________________

2. Topographical features of property:

3. Proximity (in drive time or miles) of property to downtown areas and major residential areas:
________________________________________________________________________
________________________________________________________________________

4. Major highways or heavily trafficked streets bounding or within close proximity to site?
________________________________________________________________________
________________________________________________________________________

5. Traffic counts (obtained from traffic count reports) for the streets listed above:
________________________________________________________________________
________________________________________________________________________

6. If golf course is in a residential development:

   • How many total homes will be built in development _____
   • How many homes are currently built _____ sold _____ occupied _____
   • What has been the annual absorption rate or annual volume of sales in the development ____________________________
   • What is the price range of the homes and the average price of the homes sold:
     Range _____________ Average home price sold _______
   • What is the profile of the buyers (retirees, families w/college age children, families with young children, empty nesters, a combination of all of these) ____________________________________________________________________________

7. Make a list of the following for each of the primary residential developments within a 12.4 mile radius of the golf course

   • Name of development and developer - Number of homes
   • Sales volume of homes in development - Price range of homes
   • Profile of homeowners

8. Make a list of any proposed new developments and if available, obtain the following information:
• Number of proposed homes to be built in the development
• Recreational amenities proposed for the development
• Price range of homes
• Targeted profile of buyers
DEMOGRAPHIC DATA

Primary Data To Be Obtained from a Demographic Report:

1. Demographic Area Searched (mileage radius, zip codes, census tracts, etc.):

________________________________________________________________________

2. Total population of area: ________________________________________________

3. Historic population growth (usually given between 1980 and 1990 census):

________________________________________________________________________

4. Projected population growth (usually given for next five years; sometimes in percentages rather than in raw numbers):

________________________________________________________________________

5. Total no. of households: ________________________________________________

6. No. of households with household incomes in excess of $50,000: ______________

7. Population aged 12 years or older: _________________________________________

8. Regional golfer participation rate obtained from NGF: _________________________

9. Potential Golf Rounds for Market Area:

Regional golfer participation rate from NGF X Population aged 12+ X Average of 20 rounds per golfer:

________________________________________________________________________
COMPETITIVE STUDY

Competitive information should be obtained through site visits to all public fee, semi-private, private and resort courses so as to get a visual comparison of the quality of the course, the Pro Shop, etc. Information can also be obtained through phone interviews or from a golfer or member who frequents the course.

Ideally, the following information should be obtained for the various kinds of courses:

Public Fee Course:

Name of course:________________________________________________________________
Course owner: __________________________________________________________________
Opening date of facility:__________________________________________________________
No. of Holes of Golf: ___________________________________________________________
Length of course(s): ___________________________________________________________
Course designer(s): ___________________________________________________________

Facility description (include building size, type of food and beverage operation, pro shop operations, list other amenities such as driving range, banquet rooms, etc.):
____________________________________________________________________________
____________________________________________________________________________

Pricing Information:

- Winter rates (winter season months?) - Weekday/Weekend
- Summer rates (summer season months?) - Weekday/Weekend
- Morning/Afternoon rates
- Senior/Junior rates
- Cart Fees
- Caddie Fees

Totals of 18 rounds played for each of the prior three years:

1995 Rounds - ___________
<table>
<thead>
<tr>
<th>Year</th>
<th>Rounds</th>
</tr>
</thead>
<tbody>
<tr>
<td>1994</td>
<td>_______</td>
</tr>
<tr>
<td>1993</td>
<td>_______</td>
</tr>
</tbody>
</table>

No. of Golf Outings hosted by the Public Fee Course in the prior year?

_____________________________________________________________________________
**Semi-Private Golf Course:**

Name of course: ________________________________________________________________

Course owner: __________________________________________________________________

Opening date of facility: __________________________________________________________________

No. of Holes of Golf: __________________________________________________________________

Length of course(s): __________________________________________________________________

Course designer(s): __________________________________________________________________

Facility description (include building size, type of food and beverage operation, pro shop operations, list other amenities such as driving range, banquet rooms, etc.):
______________________________________________________________________________
______________________________________________________________________________

Pricing Information:

- Winter green fees (winter season months?) - Weekday/Weekend
- Summer green fees (summer season months?) - Weekday/Weekend
- Morning/Afternoon rates
- Senior/Junior rates
- Cart Fees and Caddie Fees

Membership Information:

- Membership categories offered (individual, couple, family, senior, etc.)
- Membership privileges of each category - What does membership include?
- Pricing of each membership category
- No. of Members in each category
- Is there a cap on total number of memberships accepted?
- What is the profile of the majority of the members (retirees, couples, mostly men, etc.)?

Total of 18 hole rounds played each of the last three years? If possible, break the total rounds out by number of rounds played by members versus public fee play.
<table>
<thead>
<tr>
<th>Year</th>
<th>Member Rounds</th>
<th>Public Rounds</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1995</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1994</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1993</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Private Golf Course

Name of Golf Course: ____________________________________________________________

Course Owner:_________________________________________________________________

Opening date of facility:__________________________________________________________

No. of Holes of Golf: ___________________________________________________________

Length of Course(s): ___________________________________________________________

Course designer(s):______________________________________________________________

Facility description (include size of building, number and types of food and beverage operations, pro shop operations, and list any other amenities such as driving range, swimming pools, tennis courts, athletic facilities, etc.):
____________________________________________________________________________
____________________________________________________________________________

Membership Information:

• List all membership categories offered and their membership privileges
• Note the fees for each category, including the initiation fee, dues, stock, etc. Break out which of these fees are refundable upon resignation
• Specify any additional mandatory fees the member must pay such as food and beverage minimums or capital assessment fees
• Obtain the total number of members and the number of members in each category
• Inquire as to a membership "cap" or total number of members the club will accept - particularly in the golf category of membership
• If the club has a waiting list of members who are waiting to join, inquire as to the number of people on the list and the anticipated waiting time for them
• Inquire as to numbers of new members the club brings in each year
• Also inquire as to the numbers of members the club loses through attrition each year

Other Information:

• Does the private course accept golf outings? _________________________________

• How many 18 hole rounds of golf were played on the course:
1995
1994
1993
Resort Golf Course

Name of Resort: _______________________________________________________________
Resort Owner: _________________________________________________________________
Date Facility Opened: ___________________________________________________________
No. of Holes of Golf: ___________________________________________________________
Length of Course(s):  ___________________________________________________________
Course Designer(s):   ___________________________________________________________

Resort Description (include size of buildings, no. of lodging rooms, town homes, etc., number and types of food an beverage operations, pro shop operations, and list any other amenities such as driving range, swimming pools, tennis courts, athletic facilities, etc.):
______________________________________________________________________________
______________________________________________________________________________

Total Golf Course Rounds (resort guest rounds/outings/public fee/members):

1993   resort guest ___   outings ___  public fee ___ members ___  Total _____
1994   resort guest ___   outings ___  public fee ___ members ___  Total _____
1995   resort guest ___   outings ___  public fee ___ members ___  Total _____

Annual Occupancy Level: ________________________________________________________

Additional Data:

If Resort Course offers public fee play:
• Winter green fees (winter season months?) - Weekday/Weekend
• Summer green fees (winter season months?) - Weekday/Weekend
• Morning/Afternoon rates
• Senior/Junior Rates
• Cart Fees and Caddie Fees (if offered)

If Resort Course offers memberships:
• Are they annual memberships or memberships with initiation fees and dues?
• What are the various categories of memberships, their privileges and their prices?
• How many members are there in each category of membership?
• Is there a cap on total golf memberships sold?
• What is the profile of the majority of the members?
INTERNAL INFORMATION FOR A SEMI-PRIVATE COURSE

Date Course Opened: __________________________________________________________

Course Designer:______________________________________________________________

Description of Facility:_________________________________________________________

Strengths or Positives in comparison to competition:
____________________________________________________________________________

Weaknesses or Negatives in comparison to competition:
____________________________________________________________________________

Primary residential zip codes of fee players:
____________________________________________________________________________

Primary residential zip codes of members:
____________________________________________________________________________

Average age of members:___________

Percentage of members with children 18-yrs. old and younger:______________

Names of major area companies where members are employed:
____________________________________________________________________________

Graph the following:

- Monthly totals of members brought in over a three year period
- Monthly totals of green fees from public fee players brought in over a three year period

Total Golf Rounds: 1993 Fee players _____ Members _____ Outings _____ Total _____
1994 Fee players _____ Members _____ Outings _____ Total _____
1995 Fee players _____ Members _____ Outings _____ Total _____

No. of golf outings hosted during the year last year: ________________________________
List of advertising promotions done during the year and the resulting number of golfers generated:

______________________________________________________________________________

______________________________________________________________________________
INTERVIEW SHEETS

Please refer to the "Interviews and/or Focus Groups" section of the manual for suggestions on who to interview and questions to ask in the interview.

Name: _____________________________________________

Company: __________________________________________

Title: _____________________________________________

Golfer: Yes _____  No _____

Course(s) most frequently played:

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

Details of Interview:

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________
SUMMARY OF MARKET STUDY DATA

Economic Data:

List all negatives facts learned:

List all positive facts learned:

Other pertinent data learned:

Site Data:

List all negatives concerning the site:

List all positives concerning the site:

Other pertinent data concerning the site:

Competitive Data:

List which are considered "strongest" competition and why:

List which are considered "weakest" competition and why:

List all prospective or planned new competition and their potential threat to the golf course:

Interviews and/or Focus Groups:

Negatives learned:

Positives learned:

Other major points learned:
The Private Golf Course

Unlike the Public Fee Course or the Semi-Private Course, the Private Golf Course accepts no public fee play, the course is available only for member play. Even so, the Private Golf Course owner should still do the baseline market study as outlined in Section I. The operational private golf courses should then gather the following additional data:

Member Profile
The application for the Private Golf Course should contain the same information recommended for the Semi-Private course listed previously in this document. A zip code scattergram should also be done using the members' residential zip codes.

The member data from the application should also be used in the Private Course to graph profession, company, age, number and age of children, as mentioned previously for the Semi-Private Course.

Member Resignations
It is critical to find out why resigning members leave the club. Every resigning member should be called and asked the reason for resignation. The numbers of resigning members and their reasons for resignation should be tracked. While most reasons for resignation are "uncontrollable" as members leave the club because they are moving or their companies have transferred them, some reasons for resignation such as "dissatisfaction" should be researched further. While there may be some isolated incident that leads to the member’s dissatisfaction, club owners should stay on top of any emerging trends that may be creating attrition within the club.

Board of Governors

If a club has a Board of Governors, it should reflect a cross-section of the membership. In essence, it should have members representing women golfers, seniors, corporate
members and individual players. Board members generally have three-year terms with one-third of the Board rotating off each year. The profile of the Board should change as the profile of the membership changes in the annual updates.

Member Activities

It should be noted what member activities were hosted throughout the year and the kind of attendance each attracted. This data is very helpful in planning the social calendar of events for the members.

Interviews

*It is essential that those interviewed or invited to scheduled focus groups for a Private Golf Course represent diverse kinds of membership categories and profiles of members.*
WORK SHEETS

FOR MARKET STUDIES ON

PRIVATE GOLF COURSES
ECONOMIC DATA

1. What is the total population of the city?

2. What are the areas of greatest growth in and around the city?

3. Where is the growth coming from - new movement into the city or existing residents "shifting" to new parts of the city for upgrading purposes?

4. In what area of the city do the greatest number of professionals work?

5. In what area of the city do the greatest number of professionals live?

6. Who are the major employers in the city?

7. Are any major corporations moving into or out of the area?

8. What is the unemployment rate for the city?

9. Is there one primary industry or corporation supporting the economy or is it diversified?

10. Given the research gathered on the overall economy, is it anticipated to get worse, stay about the same or steadily improve over the next five years?
11. Was there any specific economic negatives or positives that could impact a new or existing golf course found in the research?
SITE DATA

1. Site size in acreage: ______________________________________________________

2. Topographical features of property: _________________________________________

3. Proximity (in drive time or miles) of property to downtown areas and major residential areas:
________________________________________________________________________

4. Major highways or heavily trafficked streets bounding or within close proximity to site?
________________________________________________________________________

5. Traffic counts (obtained from traffic count reports) for the streets listed above:
________________________________________________________________________

6. If golf course is in a residential development:

   • How many total homes will be built in development ______
   • How many homes are currently built ______ sold ______ occupied ______
   • What has been the annual absorption rate or annual volume of sales in the development _____________________________
   • What is the price range of the homes and the average price of the homes sold:
     Range ______________Average home price sold ______
   • What is the profile of the buyers (retirees, families w/college age children, families with young children, empty nesters, a combination of all of these)
_____________________________________________________________________

7. Make a list of the following for each of the primary residential developments within a 12.4 mile radius of the golf course

   • Name of development and developer - Number of homes
   • Sales volume of homes in development - Price range of homes
   • Profile of homeowners

8. Make a list of any proposed new developments and if available, obtain the following information:

   • Number of proposed homes to be built in the development
   • Recreational amenities proposed for the development
• Price range of homes
• Targeted profile of buyers
DEMOGRAPHIC DATA

Primary Data To Be Obtained from a Demographic Report:

1. Demographic Area Searched (mileage radius, zip codes, census tracts, etc.):

   __________________________________________________________________________

2. Total population of area:    __________________________________________________

3. Historic population growth (usually given between 1980 and 1990 census):

   __________________________________________________________________________

4. Projected population growth (usually given for next five years; sometimes in percentages rather than in raw numbers):

   __________________________________________________________________________

5. Total no. of households: ______________________________________________________

6. No. of households with household incomes in excess of
   $50,000:  __________
   $75,000:  __________
   $100,000: __________

7. Population aged 12 years or older:  __________________________________________

8. Regional golfer participation rate obtained from NGF: ____________________________

9. Potential Golf Rounds for Market Area:

   Regional golfer participation rate from NGF X Population aged 12+ X Average of 20 rounds per golfer:

   __________________________________________________________________________
COMPETITIVE STUDY

Competitive information should be obtained through site visits to all public fee, semi-private, private and resort courses so as to get a visual comparison of the quality of the course, the Pro Shop, etc. Information can also be obtained through phone interviews or from a golfer or member who frequents the course.

Ideally, the following information should be obtained for the various kinds of courses:

Public Fee Course:

Name of course: ________________________________________________________________

Course owner: ________________________________________________________________

Opening date of facility: ________________________________________________________

No. of Holes of Golf: ______________________________________________________

Length of course(s): ______________________________________________________

Course designer(s): ______________________________________________________

Facility description (include building size, type of food and beverage operation, pro shop operations, list other amenities such as driving range, banquet rooms, etc.):
____________________________________________________________________________
____________________________________________________________________________

Pricing Information:

Winter green fees (winter season months?) - Weekday/Weekend
Summer green fees (summer season months?) - Weekday/Weekend
Morning/Afternoon rates
Senior/Junior rates
Cart Fees and Caddie Fees (if offered)

Totals of 18 rounds played for each of the prior three years:

1995 Rounds - __________
1994 Rounds - __________
1993 Rounds - __________

No. of Golf Outings hosted by the Public Fee Course in the prior year?

______________________________________________________________________________
Semi-Private Golf Course:

Name of course:_______________________________________________________________

Course owner:______________________________________________________________

Opening date of facility:_______________________________________________________

No. of Holes of Golf:___________________________________________________________

Length of course(s):___________________________________________________________

Course designer(s):___________________________________________________________

Facility description (include building size, type of food and beverage operation, pro shop operations, list other amenities such as driving range, banquet rooms, etc.):
____________________________________________________________________________

Pricing Information:

- Winter green fees (winter season months?) - Weekday/Weekend
- Summer green fees (summer season months?) - Weekday/Weekend
- Morning/Afternoon rates
- Senior/Junior rates
- Cart Fees and Caddie Fees (if offered)

Membership Information:

- Membership categories offered (individual, couple, family, senior, etc.)
- Membership privileges of each category - What does membership include?
- Pricing of each membership category
- No. of Members in each category
- Is there a cap on total number of memberships accepted?
- What is the profile of the majority of the members (retirees, couples, mostly men, etc.)?

Total of 18-hole rounds played each of the last three years? If possible, break the total rounds out by number of rounds played by members versus public fee play.
<table>
<thead>
<tr>
<th>Year</th>
<th>Member Rounds</th>
<th>Public Rounds</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1995</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1994</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1993</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Private Golf Course**

Name of Golf Course: ____________________________________________________________

Course Owner:_________________________________________________________________

Opening date of facility:__________________________________________________________

No. of Holes of Golf: ____________________________________________________________

Length of Course(s): ____________________________________________________________

Course designer(s):______________________________________________________________

Facility description (include size of building, number and types of food and beverage operations, pro shop operations, and list any other amenities such as driving range, swimming pools, tennis courts, athletic facilities, etc.):
____________________________________________________________________________
____________________________________________________________________________

Membership Information:

- List all membership categories offered and their membership privileges
- Note the fees for each category, including the initiation fee, dues, stock, etc. Break out which of these fees are refundable upon resignation
- Specify any additional mandatory fees the member must pay such as food and beverage minimums or capital assessment fees
- Obtain the total number of members and the number of members in each category
- Inquire as to a membership "cap" or total number of members the club will accept - particularly in the golf category of membership
- If the club has a waiting list of members who are waiting to join, inquire as to the number of people on the list and the anticipated waiting time for them
- Inquire as to numbers of new members the club brings in each year
- Also inquire as to the numbers of members the club loses through attrition each year

Other Information:

- Does the private course accept golf outings? _____________________
- How many 18 hole rounds of golf were played on the course:
Resort Golf Course

Name of Resort: ________________________________________________________________

Resort Owner: _________________________________________________________________

Date Facility Opened: ___________________________________________________________

No. of Holes of Golf: ____________________________________________________________

Length of Course(s): ____________________________________________________________

Course Designer(s): _____________________________________________________________

Resort Description (include size of buildings, no. of lodging rooms, town homes, etc., number
and types of food an beverage operations, pro shop operations, and list any other amenities such
as driving range, swimming pools, tennis courts, athletic facilities, etc.):
______________________________________________________________________________
______________________________________________________________________________

Total Golf Course Rounds (resort guest rounds/outings/public fee/members):

1993  resort guest ___  outings ___  public fee ___  members ___  Total ___
1994  resort guest ___  outings ___  public fee ___  members ___  Total ___
1995  resort guest ___  outings ___  public fee ___  members ___  Total ___

Annual Occupancy Level: _______________________________________________________

Additional Data:

If Resort Course offers public fee play:

- Winter green fees (winter season months?) - Weekday/Weekend
- Summer green fees (winter season months?) - Weekday/Weekend
- Morning/Afternoon rates
- Senior/Junior Rates
- Cart Fees and Caddie Fees (if offered)

If Resort Course offers memberships:
• Are they annual memberships or memberships with initiation fees and dues?
• What are the various categories of memberships, their privileges and their prices?
• How many members are there in each category of membership?
• Is there a cap on total golf memberships sold?
• What is the profile of the majority of the members?
INTERNAL INFORMATION FOR A PRIVATE COURSE

Date Course Opened: ___________________________________________________________

Course Designer: _____________________________________________________________

Description of Facility and other amenities: _______________________________________

Strengths or Positives in comparison to competition:

Weaknesses or Negatives in comparison to competition:

Primary residential zip codes of members:

Average age of members: _____________________________________________________

Avg. age of 50 most recently joined members:

Major companies represented among membership:

List the following:

<table>
<thead>
<tr>
<th>Year</th>
<th>Members added</th>
<th>Members lost</th>
<th>Net Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>1990</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1991</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1992</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1993</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1994</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1995</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Primary reasons for resignation given by resigned members during past year:

______________________________________________________________________________
______________________________________________________________________________

Graph the following:

• Monthly initiation fee income for past three years over (36 month total)
• Monthly dues income for past three years
• Total number of members in each category for past three years


No. of golf outings hosted during the last year: ________________________________

Major member activities (golf, social, tennis, etc.) hosted during the year by the club and their approximate attendance rates:

______________________________________________________________________________
______________________________________________________________________________
INTERVIEW SHEETS

Please refer to the "Interviews and/or Focus Groups" section of the manual for suggestions on who to interview and questions to ask in the interview.

Name: ________________________________________________________________________

Company: ____________________________________________________________________

Title: ________________________________________________________________________

Golfer: Yes _____   No _____

Course(s) most frequently played:
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________

Details of Interview:
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
SUMMARY OF MARKET STUDY DATA

Economic Data:

List all negatives facts learned:

List all positive facts learned:

Other pertinent data learned:

Site Data:

List all negatives concerning the site:

List all positives concerning the site:

Other pertinent data concerning the site:

Competitive Data:

List which are considered "strongest" competition and why:

List which are considered "weakest" competition and why:

List all prospective or planned new competition and their potential threat to the golf course:

Interviews and/or Focus Groups:

Negatives learned:

Positives learned:

Other major points learned:
The Resort Course

A Resort course can be a Public Fee Course, a Semi-Private Course or a Private Course, depending upon the resort's surrounding market, the number of courses the resort owns or has available to it and resort owner's priorities. As previously mentioned, the priority of most resorts is to drive room revenue and increase room occupancy. To do so, resort guests must have access to the golf course. The playing patterns of the corporate and social resort guest differ in terms of weekend versus weekday and morning versus afternoon usage. To maximize the number of golfing rounds, memberships are often sold or public fee play allowed to "fill in" the tee times.

As with all golf courses, the Resort Course should do the basic market study outlined in Section I of this manual. The additional research recommended for the facility will depend on what kind of options the resort offers. For example, does the resort accept public fee pay, accept annual memberships or offer a long-term membership either to the residential development surrounding the course or the general market place? Work sheets are provided in the Resort Work Sheet Section to cover all of the options as well as this additional internal information:

Course Rounds

The tracking of the rounds on the resort courses should differentiate between resort guest rounds, outing rounds, public fee rounds and member rounds. *When compared annually, such data will provide insight into the primary sources of revenue for the courses.*

Room Occupancy Levels

Room occupancy levels should be graphed and analyzed alongside the resort guest rounds. The resort should have some idea as to what percentage of the resort guests play golf, the average number of nights guests stay, and the average number of rounds of golf guests play during their stay.
Interviews
Interviews or focus groups for the resort course should include all market groups targeted. Depending upon the resort, this may include the resort guests, members and public fee players.

Other Factors
Each Resort could have additional facilities that need analyzed or circumstances that need to be considered. The resort work sheets provide the basic data. Each resort should expand the work sheets to include their individual "moving parts" or factors to be analyzed and continue to do so in their annual market study update.
RESORT COURSE EXAMPLE

A good example of a resort whose market evolved from a resort with a semi-private membership component to a resort with a private club component is Quail Hollow Resort and Country Club in Concord Township, Ohio. For many years the counties surrounding Quail Hollow were bedroom communities for professionals and executives making the forty-five minute commute into downtown Cleveland. A market study done in 1993 showed the two counties, Lake County and Geauga County, had enjoyed a 20 percent growth rate since 1980 and they were the two top counties in the state of Ohio in terms of per capita income. The study also showed the market place had changed: there were just as many who were working in the counties themselves as there were commuting into Cleveland. Major new corporations had moved into the area, providing executive level jobs and creating a diverse, healthy economy for the counties. Residential real estate data and demographic reports confirmed the market could support a private country club at Quail Hollow.

The resort had always offered golf for the resort guests and for years had offered an annual membership on their 18 hole championship course. The resort pursued the opportunity of constructing a second 18 hole course, converting a portion of the resort facilities to a private area for members only, and offering private club memberships. The residents immediately surrounding the course were given the first priority on the memberships. To further the private club concept, it was agreed that whenever the members played their course, it would be members only, with resort guests and outings being played on the opposite course.

Because members wanted access to both courses on a members-only basis, it was decided that the designated members courses would rotate from day to day between the two 18-hole courses. In essence, the members had a 36 hole private country club. At the time of printing of this manual, Quail Hollow's new Weiskopf-Morrish course is under construction and the club has brought in more than 260 private club members before the new course has even opened. The initiation deposit to join the club is $10,000.
The owners of Quail Hollow Resort successfully developed the country club component of the resort only after in-depth research pointed to the need and potential success of the concept within the community surrounding the resort. The research further delineated market preferences which enabled them to tailor the concept to appeal to an exclusive, upscale market.
WORK SHEETS
FOR MARKET STUDIES ON
RESORT GOLF COURSES
ECONOMIC DATA

1. What is the total population of the city?

________________________________________________________________________

2. What are the areas of greatest growth in and around the city?

________________________________________________________________________

3. Where is the growth coming from - new movement into the city or existing residents "shifting" to new parts of the city for upgrading purposes?

________________________________________________________________________

4. In what area of the city do the greatest number of professionals work?

________________________________________________________________________

5. In what area of the city do the greatest number of professionals live?

________________________________________________________________________

6. Who are the major employers in the city?

________________________________________________________________________

________________________________________________________________________

7. Are any major corporations moving into or out of the area?

________________________________________________________________________

________________________________________________________________________

8. What is the unemployment rate for the city?

________________________________________________________________________

9. Is there one primary industry or corporation supporting the economy or is it diversified?
10. Given the research gathered on the overall economy, is it anticipated to get worse, stay about the same or steadily improve over the next five years?

11. Was there any specific economic negatives or positives that could impact a new or existing golf course found in the research?
SITE DATA

1. Site size in acreage: ______________________________________________________

2. Topographical features of property: __________________________________________

3. Proximity (in drive time or miles) of property to downtown areas and major residential areas:
   __________________________________________

4. Major highways or heavily trafficked streets bounding or within close proximity to site?
   __________________________________________

5. Traffic counts (obtained from traffic count reports) for the streets listed above:
   __________________________________________

6. If golf course is in a residential development:
   • How many total homes will be built in development _____
   • How many homes are currently built _____ sold _____ occupied _____
   • What has been the annual absorption rate or annual volume of sales in the development _____
   • What is the price range of the homes and the average price of the homes sold: Range ______ Average home price sold ______
   • What is the profile of the buyers (retirees, families w/college age children, families with young children, empty nesters, a combination of all of these)
     __________________________________________

7. Make a list of the following for each of the primary residential developments within a 12.4-mile radius of the golf course
   • Name of development and developer - Number of homes
   • Sales volume of homes in development - Price range of homes
   • Profile of homeowners

8. Make a list of any proposed new developments and if available, obtain the following information:
   • Number of proposed homes to be built in the development
• Recreational amenities proposed for the development
• Price range of homes
• Targeted profile of buyers
DEMOGRAPHIC DATA

Primary Data To Be Obtained from a Demographic Report:

1. Demographic Area Searched (mileage radius, zip codes, census tracts, etc.):
________________________________________________________________________

2. Total population of area: ________________________________________________

3. Historic population growth (usually given between 1980 and 1990 census):
________________________________________________________________________

4. Projected population growth (usually given for next five years; sometimes in percentages rather than in raw numbers):
________________________________________________________________________

5. Total no. of households: ________________________________________________

6. No. of households with household incomes in excess of $50,000: ______________

7. Population aged 12 years or older: _________________________________________

8. Regional golfer participation rate obtained from NGF: _________________________

9. Potential Golf Rounds for Market Area:

   Regional golfer participation rate from NGF X Population aged 12+ X Average of 20 rounds per golfer:
________________________________________________________________________
COMPETITIVE STUDY

Competitive information should be obtained through site visits to all public fee, semi-private, private and resort courses so as to get a visual comparison of the quality of the course, the Pro Shop, etc. Information can also be obtained through phone interviews or from a golfer or member who frequents the course.

Ideally, the following information should be obtained for the various kinds of courses:

**Public Fee Course:**

| Name of course: | | |
|------------------|------------------|
| Course owner: | | |
| Opening date of facility: | | |
| No. of Holes of Golf: | | |
| Length of course(s): | | |
| Course designer(s): | | |

Facility description (include building size, type of food and beverage operation, pro shop operations, list other amenities such as driving range, banquet rooms, etc.):

<table>
<thead>
<tr>
<th>Pricing Information:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Winter green fees (winter season months?) - Weekday/Weekend</td>
</tr>
<tr>
<td>Summer green fees (summer season months?) - Weekday/Weekend</td>
</tr>
<tr>
<td>Morning/Afternoon rates</td>
</tr>
<tr>
<td>Senior/Junior rates</td>
</tr>
<tr>
<td>Cart Fees and Caddie Fees (if offered)</td>
</tr>
<tr>
<td>Caddie Fees</td>
</tr>
</tbody>
</table>

Totals of 18 rounds played for each of the prior three years:

<table>
<thead>
<tr>
<th>1995 Rounds</th>
<th>1994 Rounds</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
1993 Rounds - ____________

No. of Golf Outings hosted by the Public Fee Course in the prior year?

_________________________________________________________________________________
Semi-Private Golf Course:

Name of course: ________________________________________________________________

Course owner: _________________________________________________________________

Opening date of facility: _________________________________________________________

No. of Holes of Golf: ___________________________________________________________

Length of course(s): ____________________________________________________________

Course designer(s): ____________________________________________________________

Facility description (include building size, type of food and beverage operation, pro shop
operations, list other amenities such as driving range, banquet rooms, etc.):
____________________________________________________________________________

Pricing Information:

- Winter green fees (winter season months?) - Weekday/Weekend
- Summer green fees (summer season months?) - Weekday/Weekend
- Morning/Afternoon rates
- Senior/Junior rates
- Cart Fees and Caddie Fees (if offered)

Membership Information:

- Membership categories offered (individual, couple, family, senior, etc.)
- Membership privileges of each category - What does membership include?
- Pricing of each membership category
- No. of Members in each category
- Is there a cap on total number of memberships accepted?
- What is the profile of the majority of the members (retirees, couples, mostly men, etc.)?

Total of 18-hole rounds played each of the last three years? If possible, break the total rounds
out by number of rounds played by members versus public fee play.
<table>
<thead>
<tr>
<th>Year</th>
<th>Member Rounds</th>
<th>Public Rounds</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1995</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1994</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1993</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Private Golf Course

Name of Golf Course: ____________________________________________________________

Course Owner:_________________________________________________________________

Opening date of facility:__________________________________________________________

No. of Holes of Golf: ____________________________________________________________

Length of Course(s): ____________________________________________________________

Course designer(s):______________________________________________________________

Facility description (include size of building, number and types of food and beverage operations, pro shop operations, and list any other amenities such as driving range, swimming pools, tennis courts, athletic facilities, etc.):

______________________________________________________________________________
______________________________________________________________________________

Membership Information:

- List all membership categories offered and their membership privileges
- Note the fees for each category, including the initiation fee, dues, stock, etc. Break out which of these fees are refundable upon resignation
- Specify any additional mandatory fees the member must pay such as food and beverage minimums or capital assessment fees
- Obtain the total number of members and the number of members in each category
- Inquire as to a membership "cap" or total number of members the club will accept - particularly in the golf category of membership
- If the club has a waiting list of members who are waiting to join, inquire as to the number of people on the list and the anticipated waiting time for them
- Inquire as to numbers of new members the club brings in each year
- Also inquire as to the numbers of members the club loses through attrition each year

Other Information:

- Does the private course accept golf outings? _____________________
- How many 18 hole rounds of golf were played on the course:

  1993 _____  1994 _____  1995 _____
Resort Golf Course

Name of Resort: ________________________________________________________________

Resort Owner: ________________________________________________________________

Date Facility Opened: ___________________________________________________________

No. of Holes of Golf: ___________________________________________________________

Length of Course(s): ___________________________________________________________

Course Designer(s): ___________________________________________________________

Resort Description (include size of buildings, no. of lodging rooms, town homes, etc., number
and types of food an beverage operations, pro shop operations, and list any other amenities such
as driving range, swimming pools, tennis courts, athletic facilities, etc.):
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________

Total Golf Course Rounds (resort guest rounds/outings/public fee/members):

1993 resort guest ___ outings ___ public fee ___ members ___ Total _____
1994 resort guest ___ outings ___ public fee ___ members ___ Total _____
1995 resort guest ___ outings ___ public fee ___ members ___ Total _____

Annual Occupancy Level: ___________________________________________________

Additional Data:

If Resort Course offers public fee play:

• Winter green fees (winter season months?) - Weekday/Weekend
• Summer green fees (winter season months?) - Weekday/Weekend
• Morning/Afternoon rates
• Senior/Junior Rates
• Cart Fees and Caddie Fees (if offered)

If Resort Course offers memberships:
• Are they annual memberships or memberships with initiation fees and dues?
• What are the various categories of memberships, their privileges and their prices?
• How many members are there in each category of membership?
• Is there a cap on total golf memberships sold?
• What is the profile of the majority of the members?
INTERNAL INFORMATION FOR A RESORT COURSE

Date Course Opened: ____________________________________________________________

Course Designer: ______________________________________________________________

Total Lodging Rooms:____________________________________________________________

Description of Amenities:___________________________________________________________________________

Strengths or Positives in comparison to competition:_____________________________________________________

Weaknesses or Negatives in comparison to competition:_____________________________________________________

Primary residential zip codes of fee players:___________________________________________________________

Primary residential zip codes of members:_______________________________________________________________

Total Golf Rounds:

1993  Resort Guests _____ Fee players _____ Members _____ Outings _____ Total _____
1994  Resort Guests _____ Fee players _____ Members _____ Outings _____ Total _____
1995  Resort Guests _____ Fee players _____ Members _____ Outings _____ Total _____

No. of golf outings hosted during the year: ____________________________________________________________________

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Graph the following:

- Room occupancy by month for the last three years (36 months)
- Resort guest rounds by month for the last three years

Average number of rounds played per lodging guest: ______________

List of advertising promotions done during the year and the resulting number of golfers generated:

______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
INTERVIEW SHEETS

Please refer to the "Interviews and/or Focus Groups" section of the manual for suggestions on who to interview and questions to ask in the interview.

Name: ______________________________________________________________________

Company: ___________________________________________________________________

Title: ______________________________________________________________________

Golfer: Yes _____  No _____

Course(s) most frequently played:

____________________________________________________________________________

____________________________________________________________________________

Details of Interview:

____________________________________________________________________________

____________________________________________________________________________

____________________________________________________________________________

____________________________________________________________________________

____________________________________________________________________________

____________________________________________________________________________

____________________________________________________________________________

____________________________________________________________________________

____________________________________________________________________________

____________________________________________________________________________

____________________________________________________________________________

____________________________________________________________________________

____________________________________________________________________________
SUMMARY OF MARKET STUDY DATA

Economic Data:

List all negatives facts learned:

List all positive facts learned:

Other pertinent data learned:

Site Data:

List all negatives concerning the site:

List all positives concerning the site:

Other pertinent data concerning the site:

Competitive Data:

List which are considered "strongest" competition and why:

List which are considered "weakest" competition and why:

List all prospective or planned new competition and their potential threat to the golf course:

Interviews and/or Focus Groups:

Negatives learned:

Positives learned:

Other major points learned:
HOW TO ORGANIZE AND ORCHESTRATE FOCUS GROUPS
INTRODUCTION

Again, *one of the highest forms of flattery is to ask someone their opinion on important issues and concerns that could impact your golf course.* While one-on-one interviews may be done with this audience, focus groups provide an arena for group input and interaction that can be very productive and informative. Focus groups can be a very simple, yet effective way for golf course owners to obtain opinions and guidance from the market.

Other reasons for doing focus groups include:

- Testing attitudes or initial reactions toward existing and/or potential new products and services offered at the golf course
- Discovering attitudes or reasons explaining golfers actions or reactions
- Measuring the effectiveness of various means of communications like advertisements, flyers and newsletters
- Generating new ideas or testing new ideas before implementation to measure potential success
- Pre-selling new services or products
A. **FOCUS GROUP DETAILS**

**Questions to Ask or Information to be Obtained in the Focus Groups**

The process of organizing focus groups begins with a listing of the primary objectives the researcher hopes to obtain from the focus groups. These objectives should be as specific as possible to help formulate specific questions to be asked in the focus groups themselves.

Because the process involves time and effort, all department heads or major employees dealing with various areas of the golf facility should be consulted for their input on questions and concerns to be covered. A specific list of areas to be covered and questions to be asked should then be drafted for use in the focus groups (this list is only for the focus group facilitator and should not be given to or shown to the focus group participants).

**Number and Size of Groups**

It is suggested that a minimum of three focus groups be done and the size of the groups be between ten and twelve participants (a targeted total of 36 participants). Those hosting the focus groups should not have to offer any compensation (formal focus group facilities offer participants various dollar amounts for their participation in groups) or incentives to get the participants to the focus groups. However, giving participants a usage certificate of some sort (complimentary entree, complimentary guest fee, i.e., something that will encourage usage) would serve as a gesture of gratitude for attending the focus groups. It is also suggested that these focus groups be hosted as a breakfast, lunch or cocktail gathering, whichever is apt to be best attended.

**Selection of Participants**

It is suggested that a fair representation of golfers and/or members should be chosen. The
sampling should be taken from active as well as inactive golfers, new and long-standing users, young as well as old. The golf professional and his staff could recommend the participants.

**Invitation to Participants**

If the goal is 36 participants (three groups of twelve), then a total of 60 prospects should be mailed an invitation to attend the focus groups (see Exhibit C - Letter of Invitation). A self-addressed, stamped reply card is sent with the invitation (see Exhibit D - Sample Reply Card) so the participant can select a group and mail a response back to the golf course.

A staff member should review the cards as they are returned to make certain the focus groups are equal in number of attendees. Phone calls should be made to confirm the participants' attendance or to ask if they could "switch" to a group that may need more participants so as to balance the groups. Once again, target no more than twelve nor less than ten per group. Fifteen confirmed attendees will probably yield ten to twelve participants. If the original sixty prospects do not provide the number needed, additional phone calling should be done to invite more individuals.

**Room Setup and Service Details**

When planning a focus group, *make certain the table setup provides for good eye contact between participants*. A round or square table setup is best.

Service of the planned meal or cocktails should be kept to a minimum. For instance, if a luncheon focus group is planned, have a set menu. Have the servers pre-set the salads and serve the entree as soon as possible. Desserts and coffee service are appropriate. The focus group facilitator should not eat with participants and should focus on asking
the questions and controlling the group.

**Club Staff Facilitator versus Independent Third Party**

Each researcher has to decide, given the objectives of the focus groups, who could best moderate the sessions. From the outset, it should be stated that Focus Groups can be very difficult to moderate and "control." Some of the most difficult sessions are those that must delve into and explore some very controversial or emotional topics with the participants. For these reasons, the following is recommended when considering a facilitator for the groups:

- An independent third party is always the best choice, as they are not an employee of the facility who deals with the individuals on a daily basis. When necessary during the group sessions, they can feign ignorance and not be expected to answer questions - only ask them.

- Participants may not be totally honest and open within a focus group if a staff member is the facilitator, because they may not want to embarrass the staff member.

- A third party will tend to be more objective and will come across as such to the participants in the group.

- A trained professional can maintain control of the group and make certain they do not turn into major gripe sessions.

Suggestions for these independent facilitators could be regional staff, corporate staff or independent consultants. It is important that they be experienced focus group facilitators.
B. CONDUCTING THE FOCUS GROUPS

Introductions

If the moderator is not a staff member, a staff member should be present at the outset to introduce the participants to the facilitator.

Name Tags/Place Cards

Name tags should be prepared and given to all participants as they arrive. The facilitator should also have a name tag. Two-sided place cards are a good alternative, with the added benefit of providing a seating chart for the moderator.

Warm-Up

Although previously introduced by a staff member, the facilitator should once again introduce himself/herself and state the purpose of the focus group.

From the outset, the group should be told they should feel free to disagree with any opinions or statements made during the course of the session. They should also be encouraged to "jump right in" with any thoughts, suggestions or added comments that come to mind during the discussions.

It is important to "get everyone talking" and break the ice. It is recommended that the group be asked a simple question like, "Would you please introduce yourself to the group and tell us how long you have been playing golf at the facility?" Other simple questions such as "How frequently do you play golf?" or "What were your reasons for becoming a member of the facility?" could then follow.
In-Depth Questions

Once the group has gotten "warmed up", gradually move into the more important or "meatier" matters to be covered in the group. Be sure to cover the most important topics first in case time runs out. Be sure to "pace" the group so as not to spend too much time on any one topic.

Be sure to repeat the question frequently as you move from participant to participant for a response. Repeat answers for clarification purposes when possible.

Summarize Frequently
For clarification and confirmation purposes, the facilitator should summarize what is being heard from the participants before moving on to new topics and as a form of closure on the previous topic discussed.

Length of Focus Groups

It is important to promise group participants that they will be kept only one hour. This should be stated as the focus group begins. Participants should be told that the facilitator will be available to answer any additional questions or provide information after the group has adjourned.

Closure

Once all the major topics have been covered, the facilitator should move towards ending
the session. A good way of bringing the group to a close is to "recap" the more important points made by the group. Not only does this confirm the information gathered by the facilitator, but it lets the group know how carefully the moderator listened to their input.

Participants should always be thanked as a group prior to adjournment and then individually thanked prior to departure.
C. HANDLING PROBLEM SITUATIONS

There are certain things that should never be done in a focus group: a negative or sour note.

The following are some suggestions for difficult situations such as:

- **Dominating Participants**

  Look directly at those you wish to hear from and avoid eye contact with those who you don't want to respond.

  Try phrases like, "Okay, we know how Robert feels, how about the Members on this side of the table?"

  Pinpoint other participants by name and ask them to respond.

- **Non-Participating Members**

  If there is a loud silence, repeat the question.

  Be silent and "freeze" them out.

  Once again, pinpoint someone by name and ask for their input.

- **Questions or Comments that Require Responses**

  Often participants will bring up questions that should be addressed individually. Explain that you would like to address that question after the focus group. Avoid the temptation to take the time to do so during the focus group. Make a point to
see the individual after the group has adjourned to provide the necessary response.

Make a note to follow up with the participant, letting him/her know you will obtain an answer and respond as quickly as possible after the session ends.

• **Tough Focus Groups**

Some of the toughest groups to moderate are those that must explore controversial issues that participants may feel strongly about. Tempers may flare and participants may strongly disagree among themselves. This is when a trained facilitator must work to maintain control and keep the focus group on track. A facilitator should be chosen understanding he or she must be able to handle these tough kinds of situations.

• **Keeping the Focus Group Focused**

Focus groups often include individuals who have known each other for years. Sometimes this poses a challenge as they may use the group session as an opportunity to "visit," catch up" or "share some information." Often times, the group will wander off on tangents, and a trained facilitator can use some gentle humor to bring them back around. The facilitator must keep the group focused, pace the group as they cover the important topics, and keep side discussions to a minimum.
D. FOLLOW-UP

After all sessions have been completed and the important information gathered, always make certain to thank the participants.

Be certain to follow up with a thank you note to those participants who attended the session (see Exhibit E - Thank You Letter).

E. DRAWING CONCLUSIONS

It is important to understand that focus groups produce qualitative input, not quantitative research. *Focus group results do not necessarily represent what a majority of the golfers think.* Try to listen for underlying themes from group to group. If you need or want a consensus, use the focus group themes to develop a finely-tuned questionnaire that will get right at the issues.
EXHIBIT C

SAMPLE LETTER OF INVITATION TO FOCUS GROUP PARTICIPANTS

Dear

As the Oakmont Golf Club begins our planning process for next year, it is very important to us that we visit with some of our valued golfers and get your input on a number of issues. We are hosting focus groups with our golfers on August 3rd, 4th and 5th. These luncheon focus groups will last no more than an hour. We are inviting you to be among our participants at the focus group of your choice during these three days.

Enclosed is a self-addressed, stamped reply card. Please check the focus group that you wish to attend and return the card to the club no later than July 25th.

Your input is very important to us and we hope you can take the time out from your busy schedule to join us at one of these focus groups.

Sincerely,

Golf Course Manager
EXHIBIT D

SAMPLE OF REPLY CARD

Please check the date below of the focus group you will be able to attend:

  August 3, 12:00 p.m., Oakmont Golf Club ______
  August 4, 12:00 p.m., Oakmont Golf Club ______
  August 5, 12:00 p.m., Oakmont Golf Club ______

  I am sorry, I will not be able to attend any of the focus groups ______

If you have any questions or would like any further information, please contact the Oakmont Golf Club at (214) 555-1212.
EXHIBIT E

SAMPLE THANK YOU LETTER

Dear

We want to thank you for attending one of our focus groups held at Oakmont Golf Club during the week of August 3rd. You provided us with some valuable insights that will assist us in our plans for Oakmont Golf Club.

We hope to see you again soon at Oakmont Golf Club.

Sincerely,

Golf Course Manager