

100 Short Course Facilities

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Golf Up

5th Golf Innovation Symposium

USGA®

The 100 Short Course Facilities Plan

ffgolf[®]

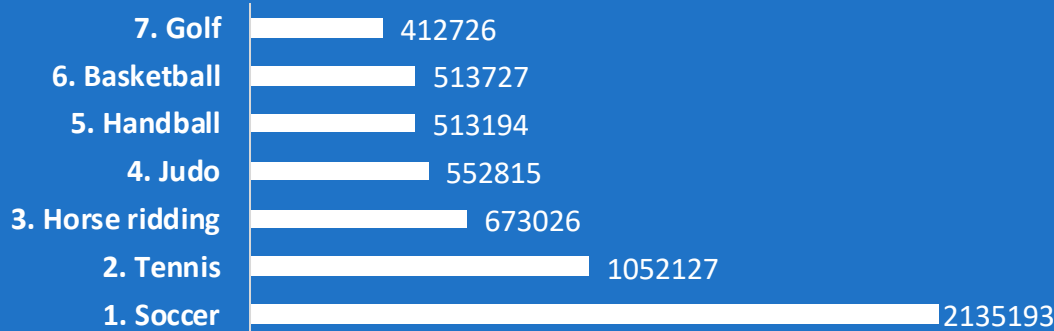
Fédération française de golf



Report – French Golfers

- **412,726 golf license holders**
(4.7% of total sport license holders)
- About 400,000 golfers without licenses
- Travels 20 km to a course
- Increasingly urban
- Spends €500 annually on equipment & clothing

License holders by sports (total: 8.7M)



French Golf Course Market

SUPPLY



- Majority are big courses (64% in 2010)
- Located in rural areas
- Dedicated to competition

DEMAND



Based on desire for:

- Leisure
- Conviviality
- Speed
- Low rates
- Ease
- Well-being

Strategy



GOAL

Respond to the demand

- Smaller and less-time consuming
- Urban proximity and easy to access
- More accessible rates
- Addition to 18-hole courses

2010 – 2020: Build 100 new facilities in 10 years



€65 MILLION INVESTED

Strategy



NEW FACILITIES

Features

- Average size: 5.7 hectares
- Shorter holes (pitch & putt)
- Large driving range and practice greens
- Smaller reception and maintenance buildings

All Audiences Satisfied



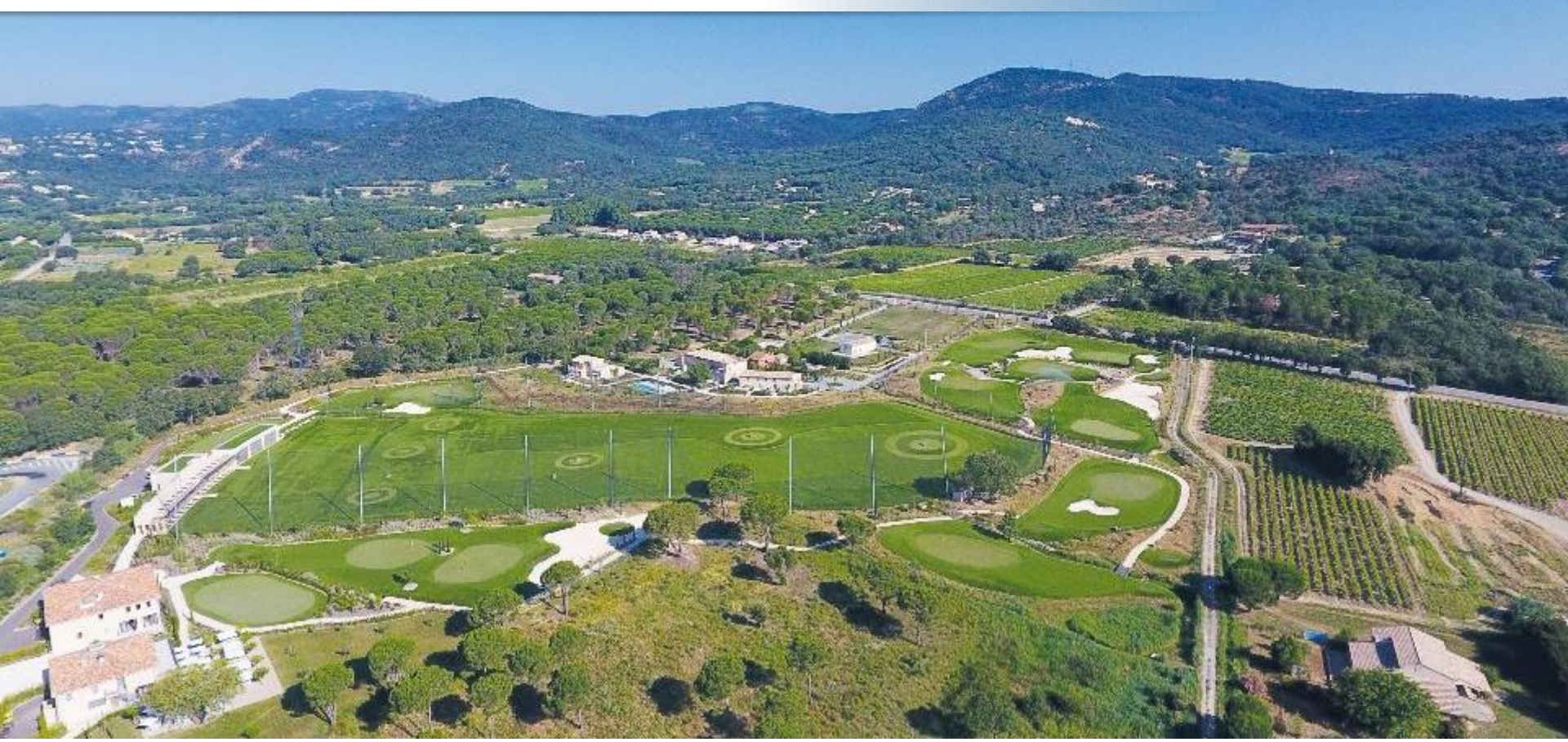
Golf of Cap Malo: Brittany, West of France (2008)



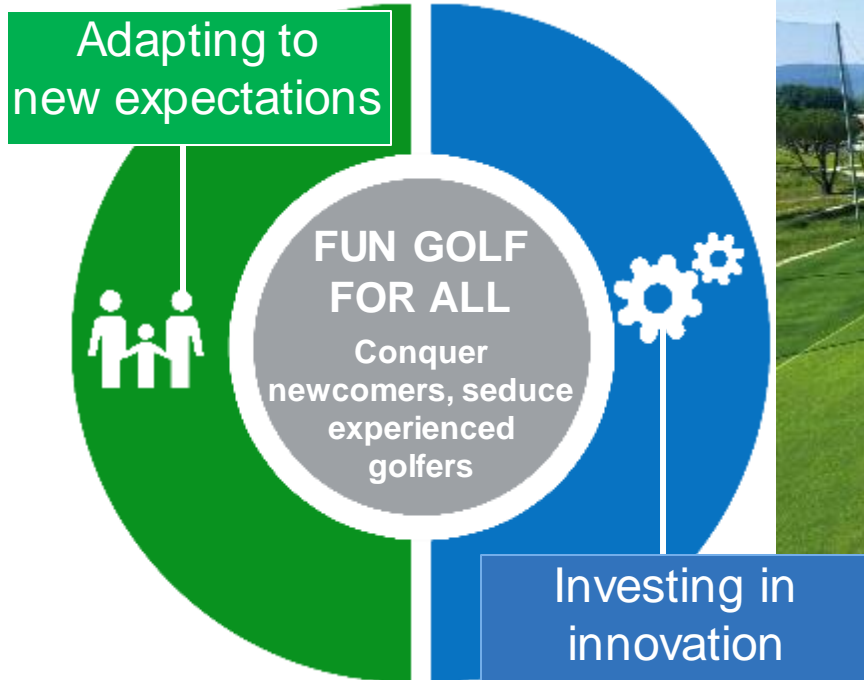
Golf of La Gloriette: Central France (2008)



GOLF UP: South of France (April 2017)



Small Facilities, New Perspectives



Small Facilities, New Perspectives

Adapting to
new expectations



**FUN GOLF
FOR ALL**
Conquer
newcomers, seduce
experienced
golfers



Investing in
innovation



Adapting to New Expectations & Consumers

**EASY
ADMISSION**



**AFFORDABLE
PRICES**



**TIME
MANAGEMENT**



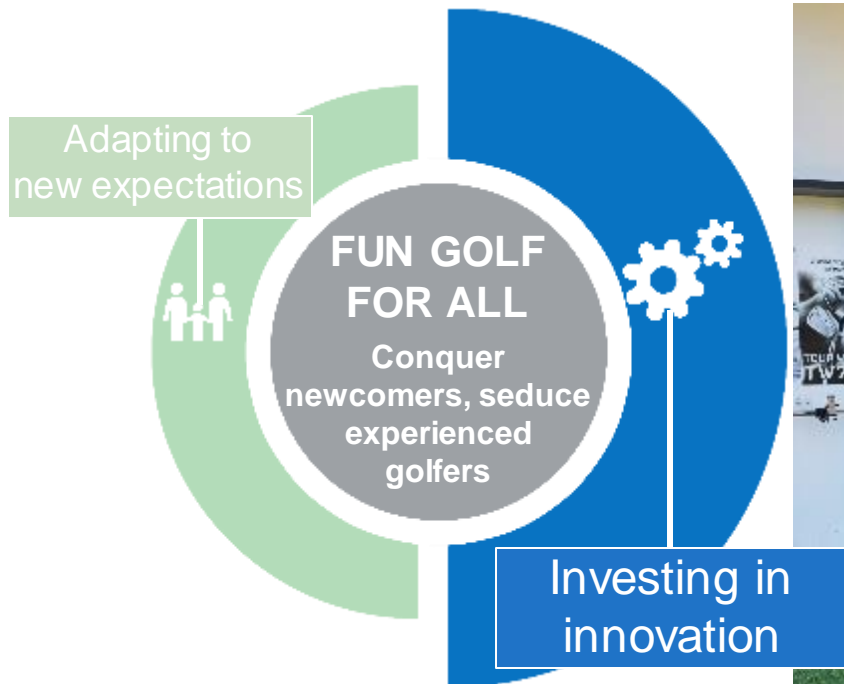
**MULTIPLE
SERVICES**



One New Model



Small Facilities, New Perspectives



Natural or Synthetic?

OPERATIONAL SAVINGS



- ✓ Less maintenance
- ✓ No watering (except in case of heat)
- ✓ No phytosanitary products

EASIER TO PLAY FOR BEGINNERS



Number of short courses made with synthetic turf

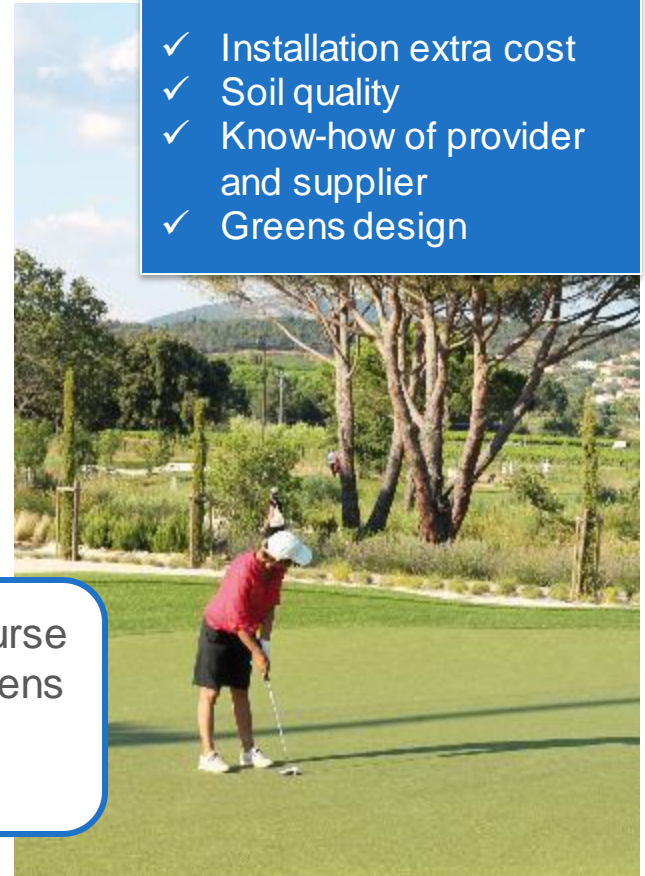
32

Average cost of a short course with synthetic tees and greens

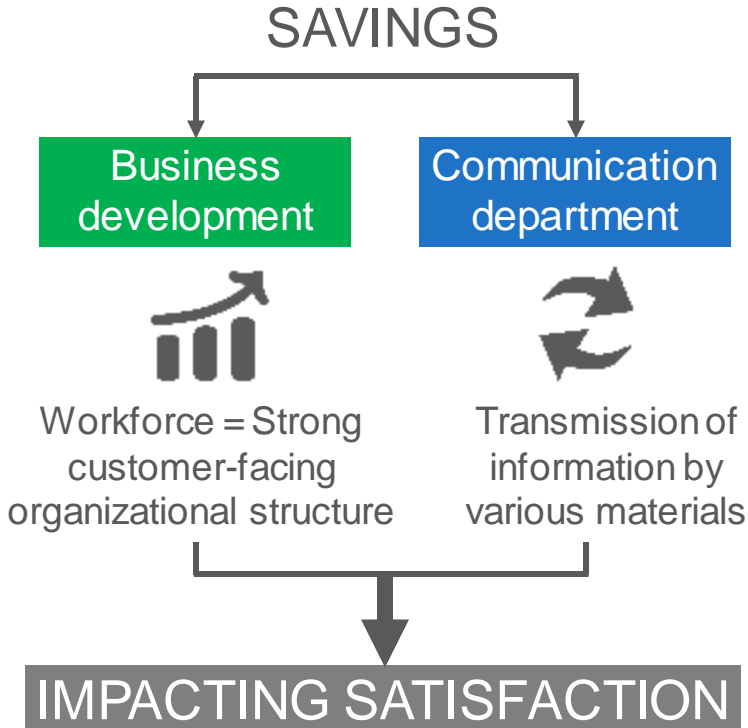
€485,000

But...

- ✓ Installation extra cost
- ✓ Soil quality
- ✓ Know-how of provider and supplier
- ✓ Greens design

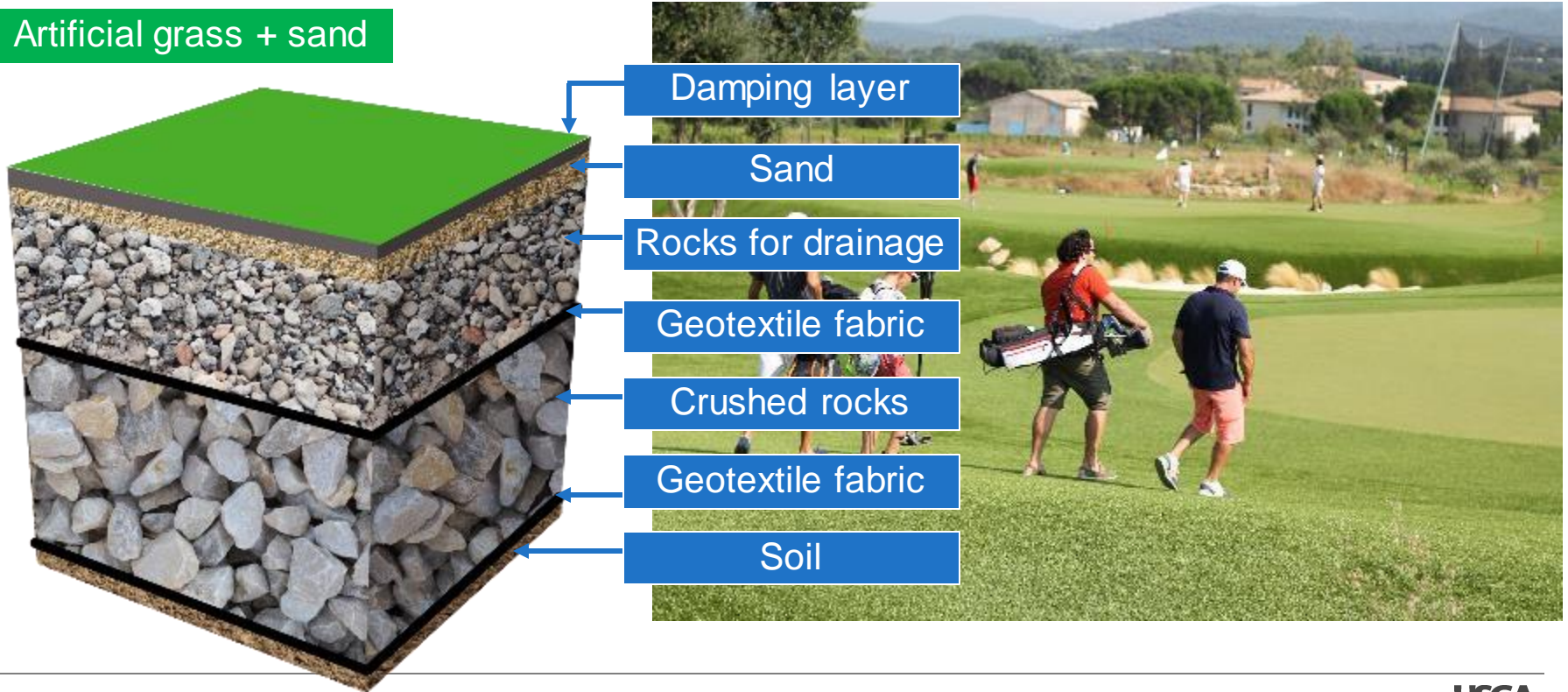


Is Synthetic the New Green?



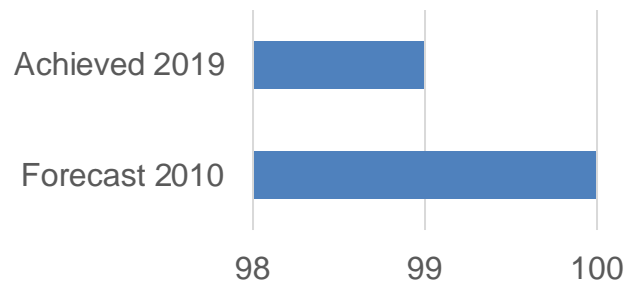
Is Synthetic the New Green?

Artificial grass + sand



Results: National

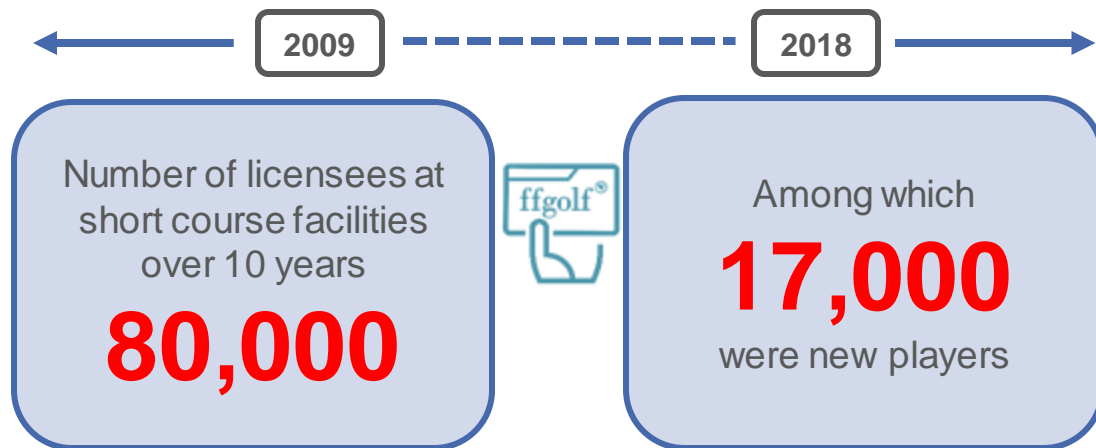
➤ 100 SHORT COURSES



Average age of short-course licensees

41

➤ REGISTERED LICENSEES



Results: National

➔ WHO HAVE YOU VISITED WITH?

(top 4 responses)

Friends



63%

By Myself



48%

My Children



22%

Colleagues



7%

Results: National

➤ RATE THE FOLLOWING FEATURES IN TERMS OF



Results: National

➤ UTILIZATION

Driving Range **86%**

86% Course

Putting Facilities **68%**

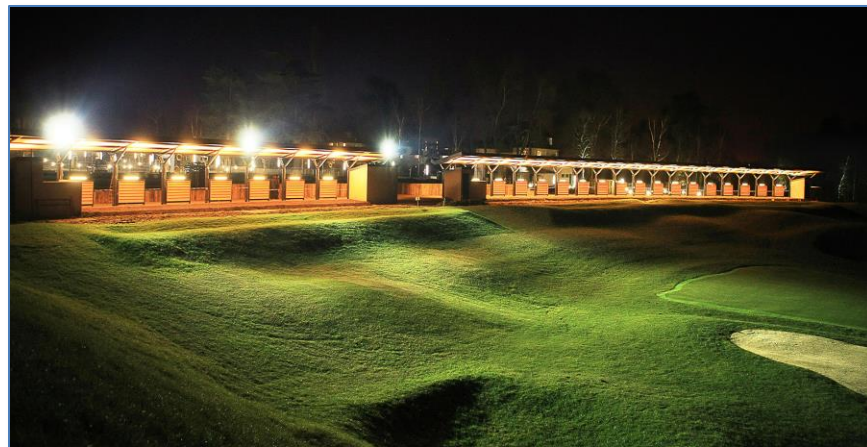
55% Lessons

Shore Game Area **46%**

40% Practice Bunkers

Restaurant **23%**

13% Pro Shop



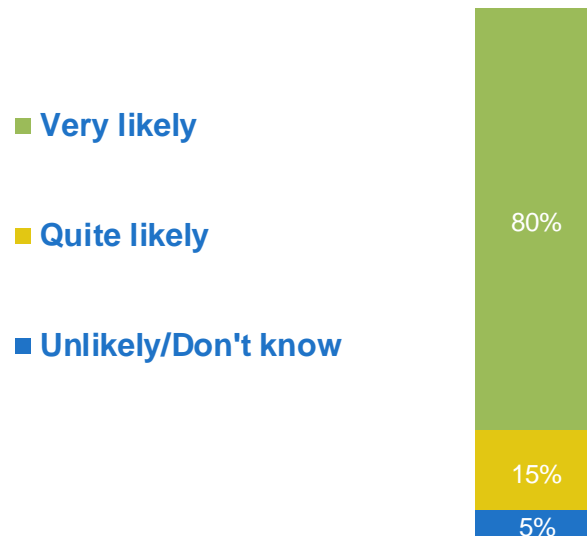
Results: National

➤ DID EXPERIENCING THESE FACILITIES MEET YOUR EXPECTATIONS?



Registered Golfers

➤ HOW LIKELY IS IT THAT YOU WILL RETURN TO ONE OF THESE VENUES?

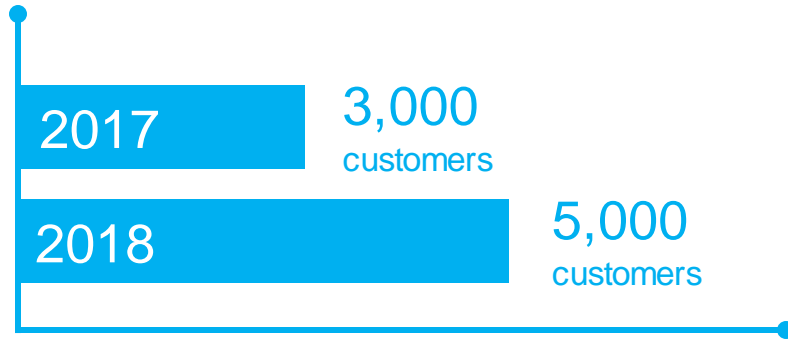


Registered Golfers

Results: Golf Up



Results: Golf Up



+66%

Increase of customers in 2 years (in an area with a population of 50,000)

75%

of customers are less than 50 years old

60%

of customers are beginners

+32

NPS Score