

GCAE

Attracting New Golfers

R&A



GOLF THRIVING IN 50 YEARS



Key Strategic Goals

New Golfers

Build market share amongst sports participants

Australia

Members

380,000

59 average age

78% Male

22% Female

Round Players

865,000

55 average age

85% Male

15% Female

Ball Hitters

295,000

49 average age

59% Male

41% Female

Alt Players

1,645,000

40 average age

34% Male

66% Female

Interested

5,800,000

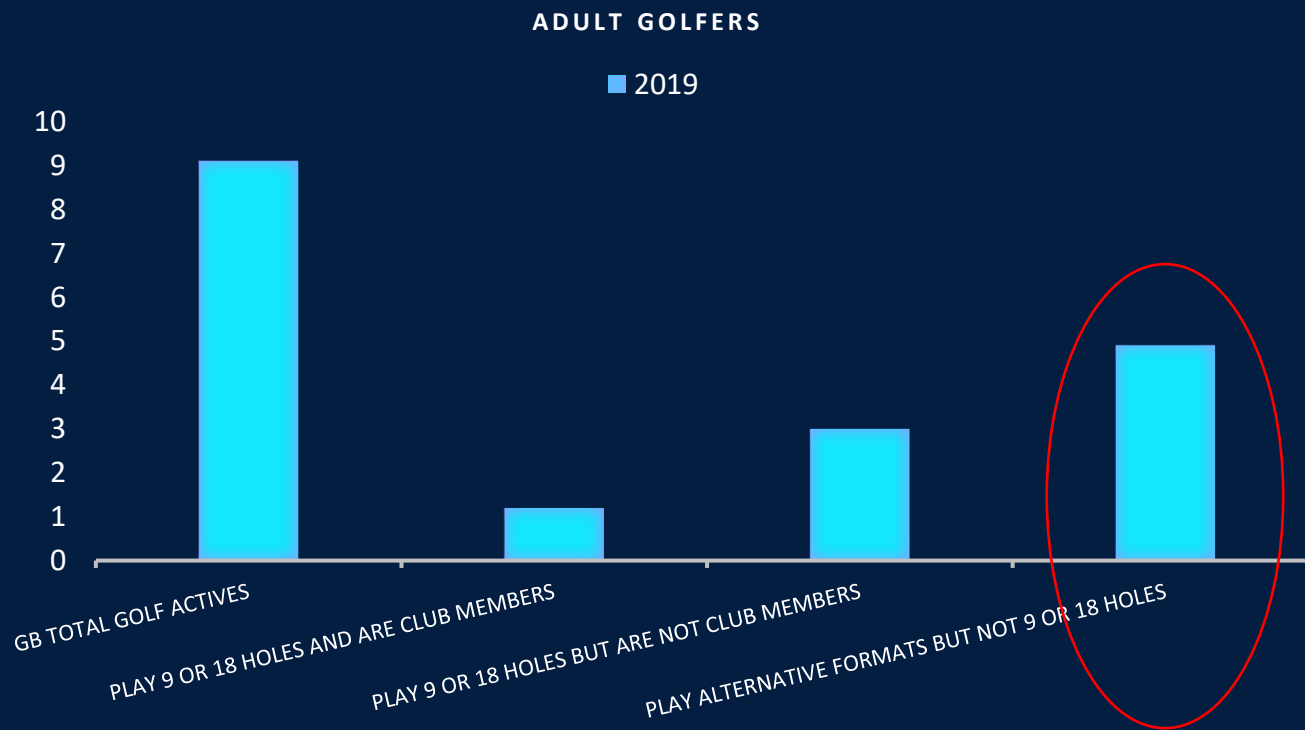
43 average age

54% Male

46% Female

Existing Golfers

Transition Alternative Format golfers to On Course

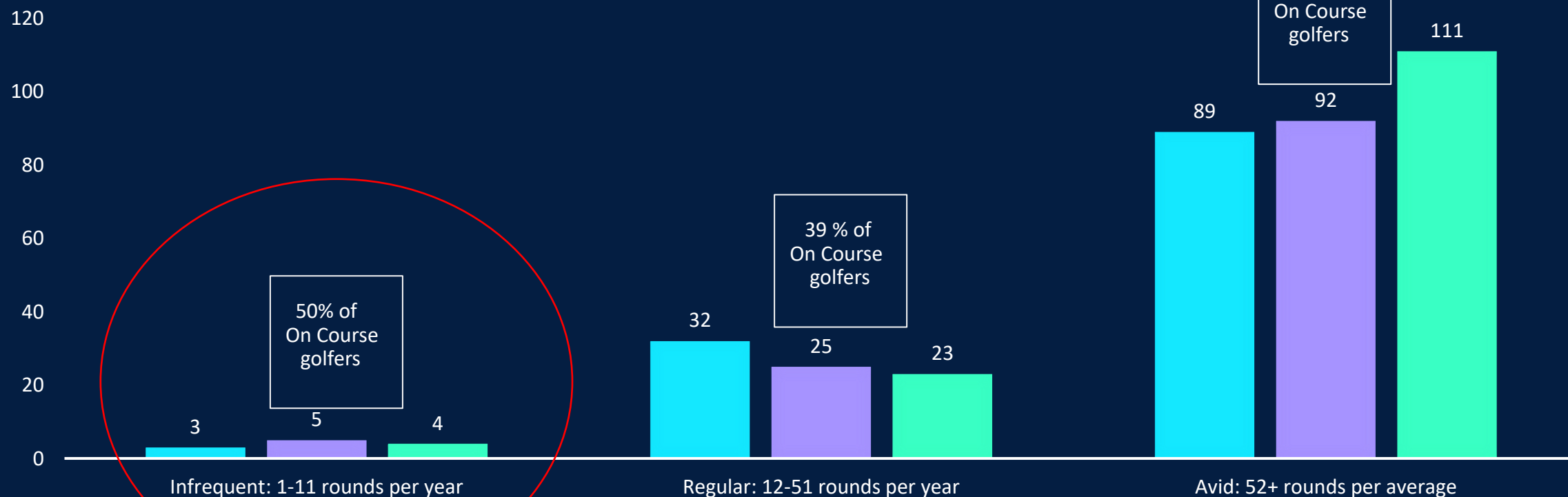


Existing On Course Golfers

Build frequency of play

GB ROUNDS PLAYED — AVERAGE BY GOLFER TYPE

■ 2017 ■ 2018 ■ 2019



Strategy 1

People and Proposition

Create compelling propositions for golf's highest potential audiences



Focus resources by targeting low hanging fruit



Proposition

‘Is a sport for people like me’



8%



+8% vs. Golf



+9% vs. Golf



+30% vs. Golf

What makes golf different, better and special?



Now you are aware of golf's health benefits....

Play more golf	On Course Golfers 51%
Likely to return to golf	Lapsed Golfers 39%
Likely to play golf	Non-Golfers who play sport 15%
Likely to play On Course	Off Course Golfers 81%



Environment



Achievement



Camaraderie



Strategy 2

Promotion

Engage all golfers and high potential new golfers



Golf needs to promote and build an appealing image

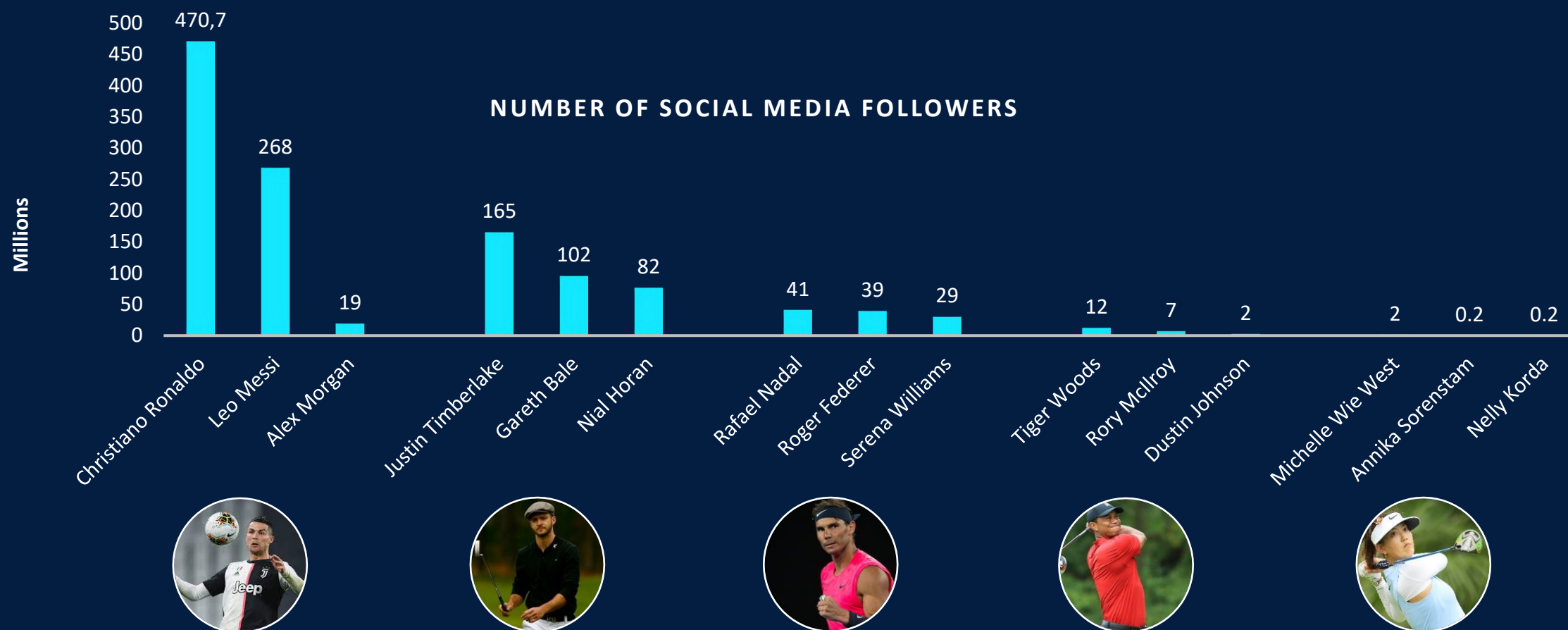
Promotes itself to people like me	6%
Modern Sport	8%
Appealing	10%
Mainly a sport for older people	35%
Exclusive	37%



Tennis and Cycling
outperform golf by up to 9x



Efficiently reach millions of prospective golfers



R&A Development Ambassadors



Dani Hantuchova



Kathryn Newton



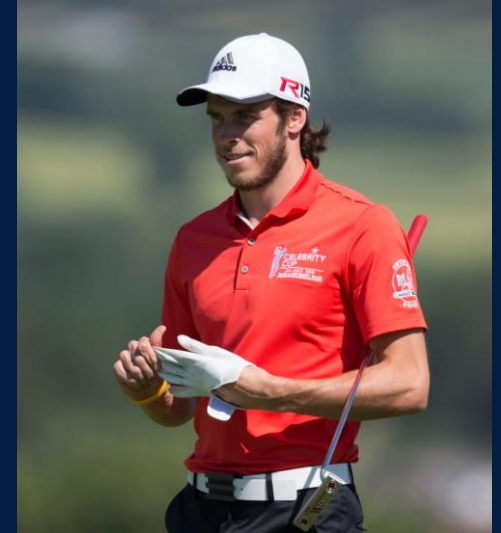
Kevin Pietersen



Niall Horan



Bryan Habana



Gareth Bale



Michelle Wie

R&A Content Series: Presented by Niall Horan

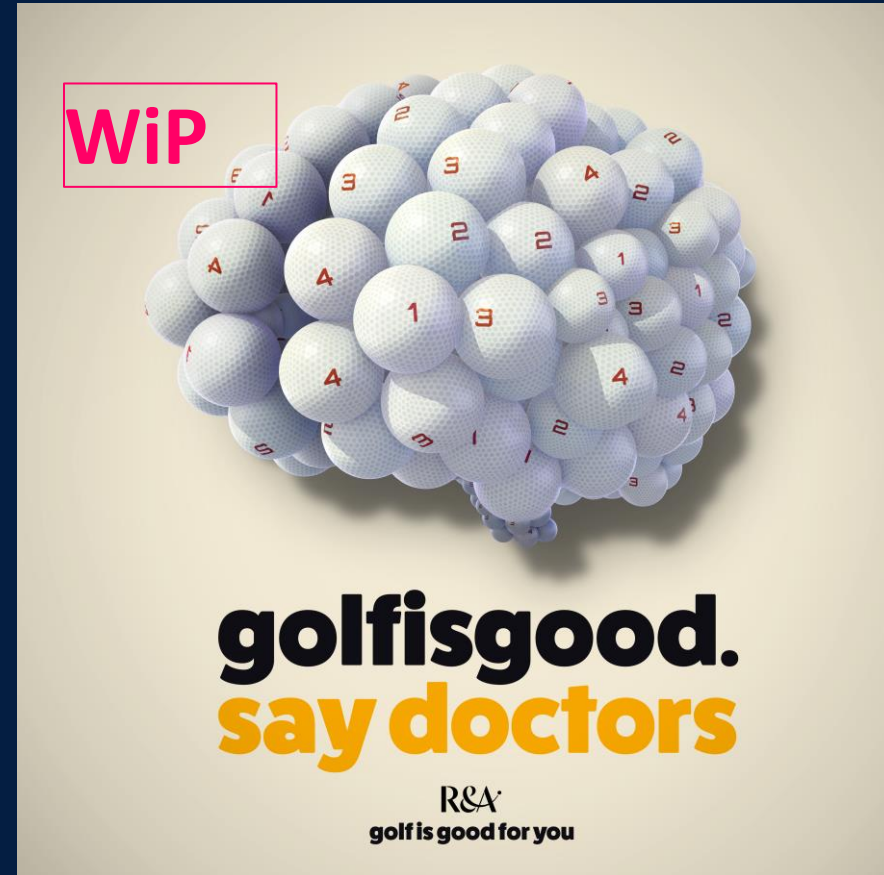






STATICS.

Doctors Endorsement x 2



Played more golf than usual during the campaign

Saw the campaign 65%

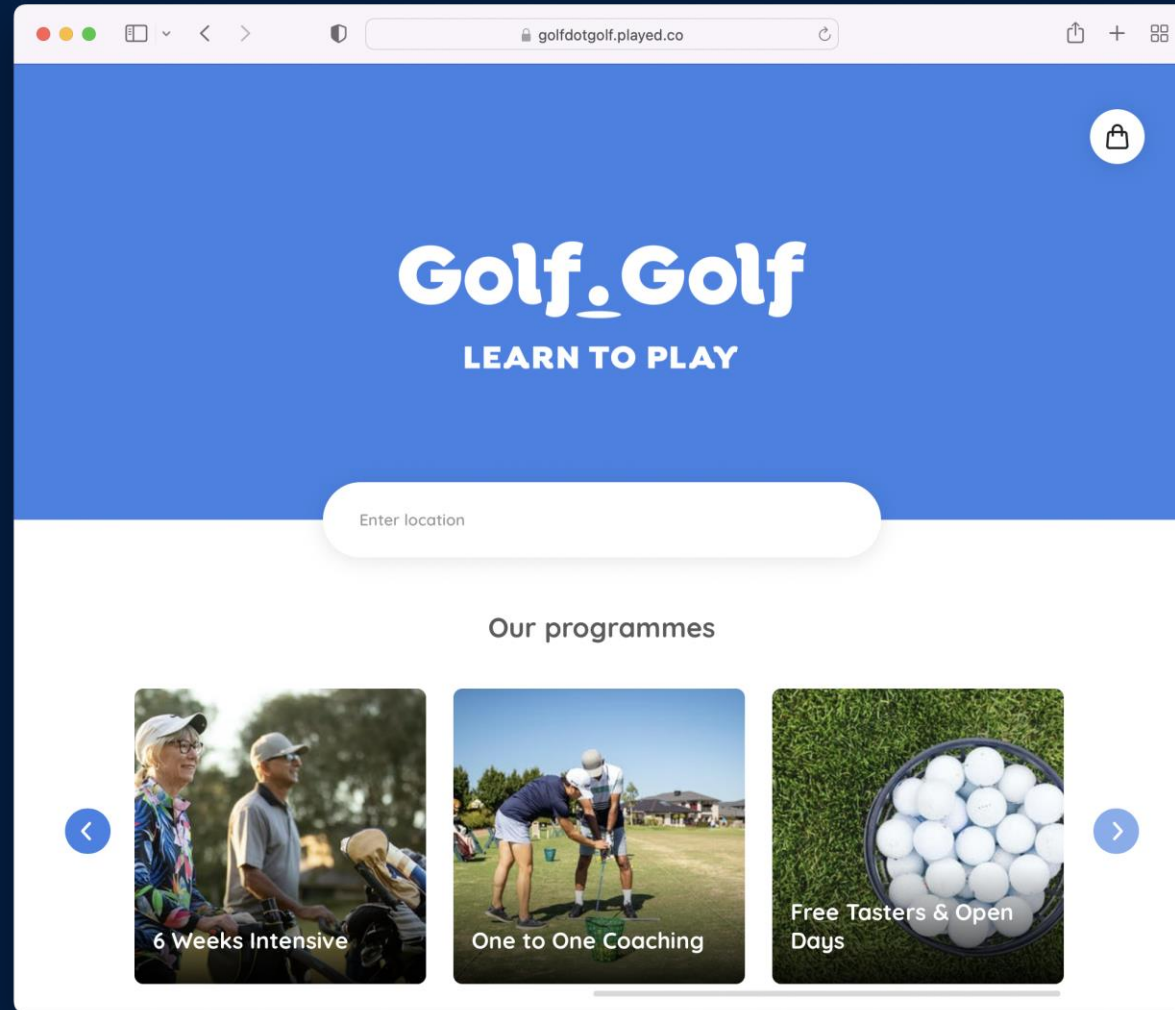
Did not see the campaign 48%

Why do you not play golf?

Don't know how to play

44%

Would you like to attend a structured beginner programme?	
Very Likely	13%
Likely	26%
Possibly	48%



Can you recall promotion of a golf beginner programme?	
No	74%

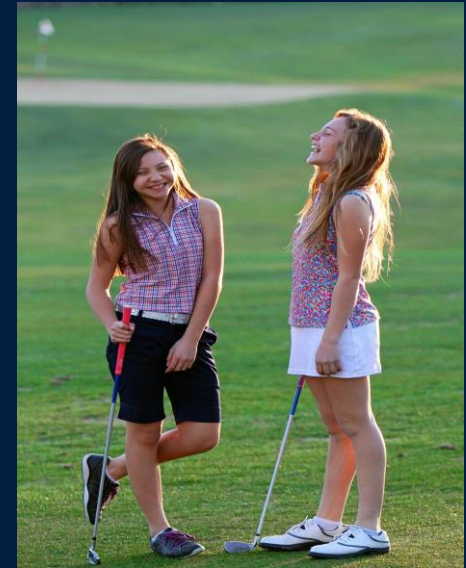
International



National




Participants



Where would you like to learn?	
Public Golf Course	50%
Private Golf Course	38%
Driving Range	30%
Town Centre simulator	21%






All Programmes

Our programmes are designed to help Golfers of all ages and abilities learn the beautiful game. We have programmes for juniors, adults and older adults. These programmes include Future Stars, Free Coffee & WiFi, 6 Week Intensive, Get Confident in the Basics and more.

Our Venues




16.3km

Carnoustie Golf Links

Carnoustie Golf Links Ltd, Links H...

[View venue](#)




64.6km

Kingsfield Golf Centre

Kingsfield Lodges Ltd, The Busine...

[View venue](#)



87.2km

Paul Lawrie Golf Cent...

Paul Lawrie Golf Centre, Aberdeen...

[View venue](#)



Which is most important for a programme?

Relaxed, no pressure environment

#1

How prefer to learn?

Group with new people

#1

Preferred Programme

Free relaxed Golf Day with other beginners

#1

Basics of golf in the outdoors with like minded people

#2

Incentives

Free equipment to practice



55%

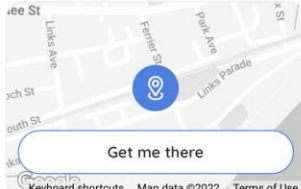

Voucher for club membership


41%


Voucher for equipment

36%


[View venue](#)




 Carnoustie Golf Links Ltd, Links House, Links Parade, Carnoustie, Angus, DD7 7JE

 Share activity



Get Confident in the Basics


 £50

 4th Aug 2022 - 8th Sep 2022

Schedule

6 spaces remaining

Session 1	 4th Aug 2022	09:00am - 10:00am
Session 2	 11th Aug 2022	09:00am - 10:00am



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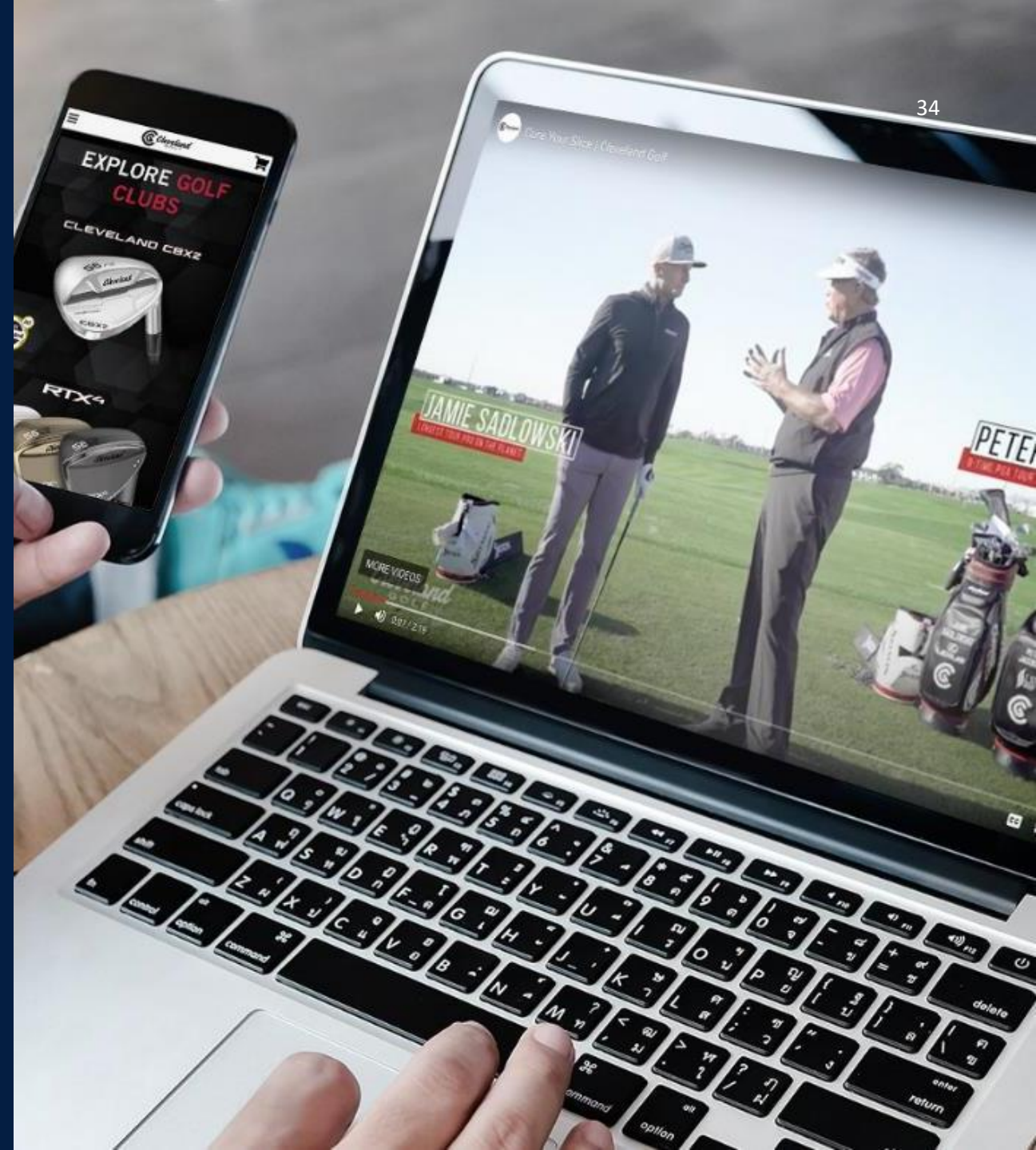
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“The response was amazing,” explains Joyce Boyd, volunteer coach at Westhill Golf Club. “We were really surprised at the response it got. Last year we ran a ‘get into golf for ladies’ session targeting the mums of the juniors that we coach, but it didn’t get the same level of pickup. When we launched the Golf.Golf package, the response was phenomenal’

Digital Engagement



Sponsor Support



Golf for people with disability



Strategy 3

Transform Women and Girls' Golf



Sports fans who follow a women's sport

Golf

10%

Tennis

40%

% Women players who follow the sport

Golf

29%

Tennis

63%



Get into the Consideration Set

RULE: TRY. SECOND RULE: TRY AGAIN. LIFE WILL HURT
BUT IT WILL GIVE YOU STRENGTH. TO NEVER GIVE UP, GIVE IN,
FOR SIZE, SHAPE, OR STORY. THERE'S NOTHING YOU CAN'T
TAKE. NO OBSTACLE YOU CAN'T GET OVER. OR POWER S
THE JUDGERS, DISAPPROVERS, NON-BELIEVERS. FEAR LE
BECAUSE ONCE YOU'VE STARTED, YOU CAN'T BE STOP

TRY AND STOP US



BECOME UNSTOPPABLE
WWW.WOMEN.RUGBY

NATALIE PINKHAM | FLEUR EAST | HELEN SKELTON | BELA SHAH

THE JOURNEY BEGIN
6 MONTHS TO MASTER GOL

BMW
PGA CHAMPIONSHI
Official Sponsor

PGA The Professional Golfers' Association

COMING SOON ON @slingsbysocial



194 million Women viewers

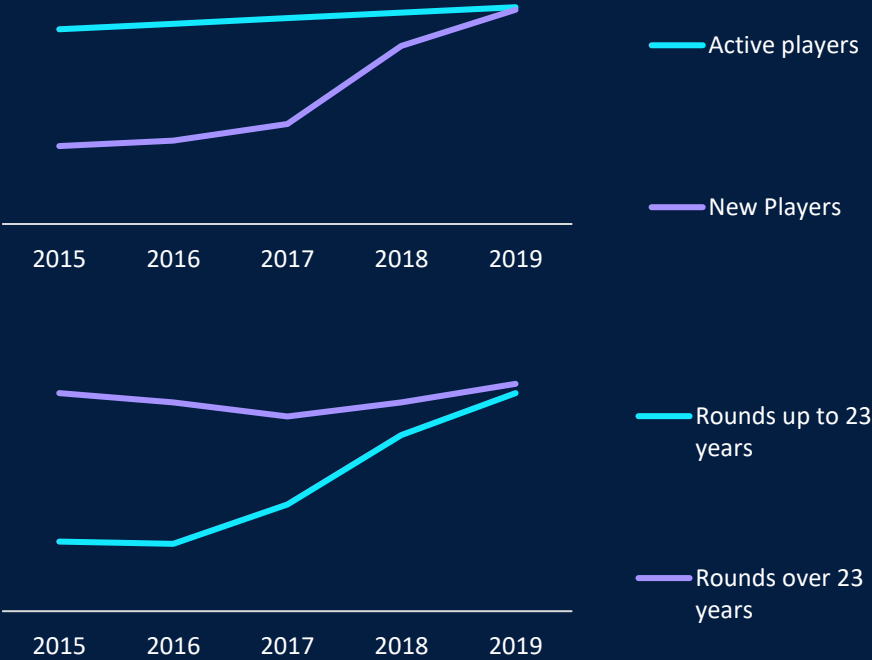
27% who watched want to try golf



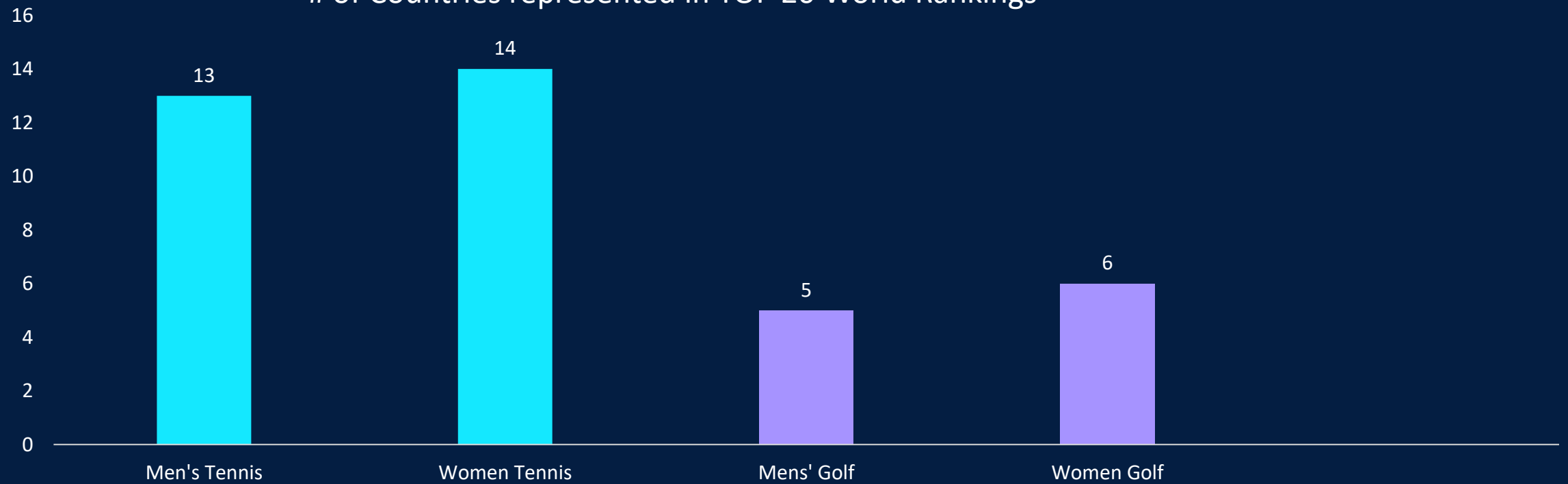
Strategy 4

Increase the international breadth of inspirational professional golfers





of Countries represented in TOP 20 World Rankings



Best Practice High-Performance



Strategy 5

Product, Availability and Value

Support the development of golf facilities and formats of play



Golf It!



Golf 6's for Children

If your children had the opportunity to play in a safe, organised golf league, playing in teams of 6 with friends for an hour at a time, how interested would you be in your children taking part in this?

53% All Adults

68% Golfers



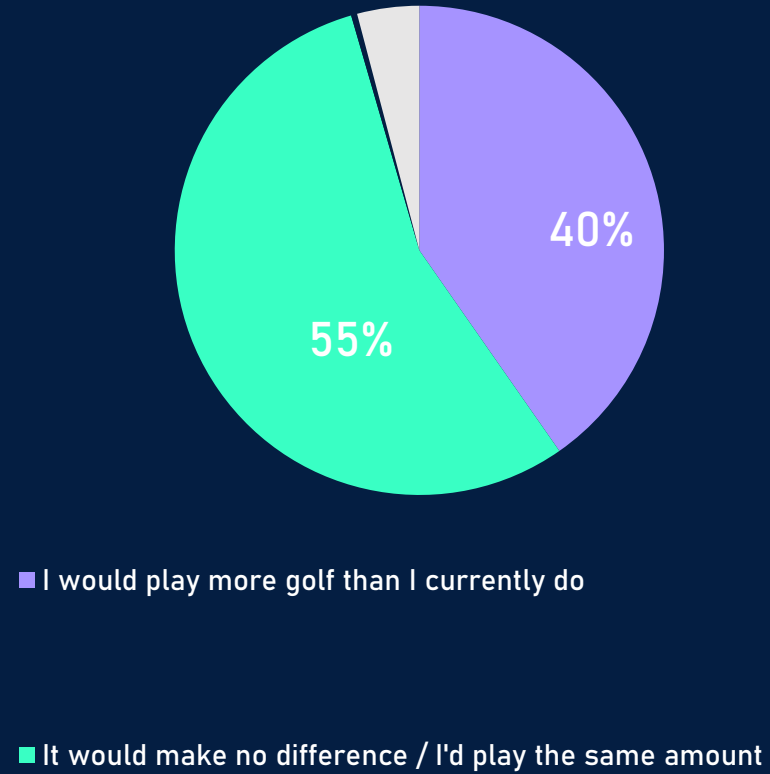
Golf 6's for Adults

Team League

Definitely would play

All: 32%

16-30: 48%



Strategy 6

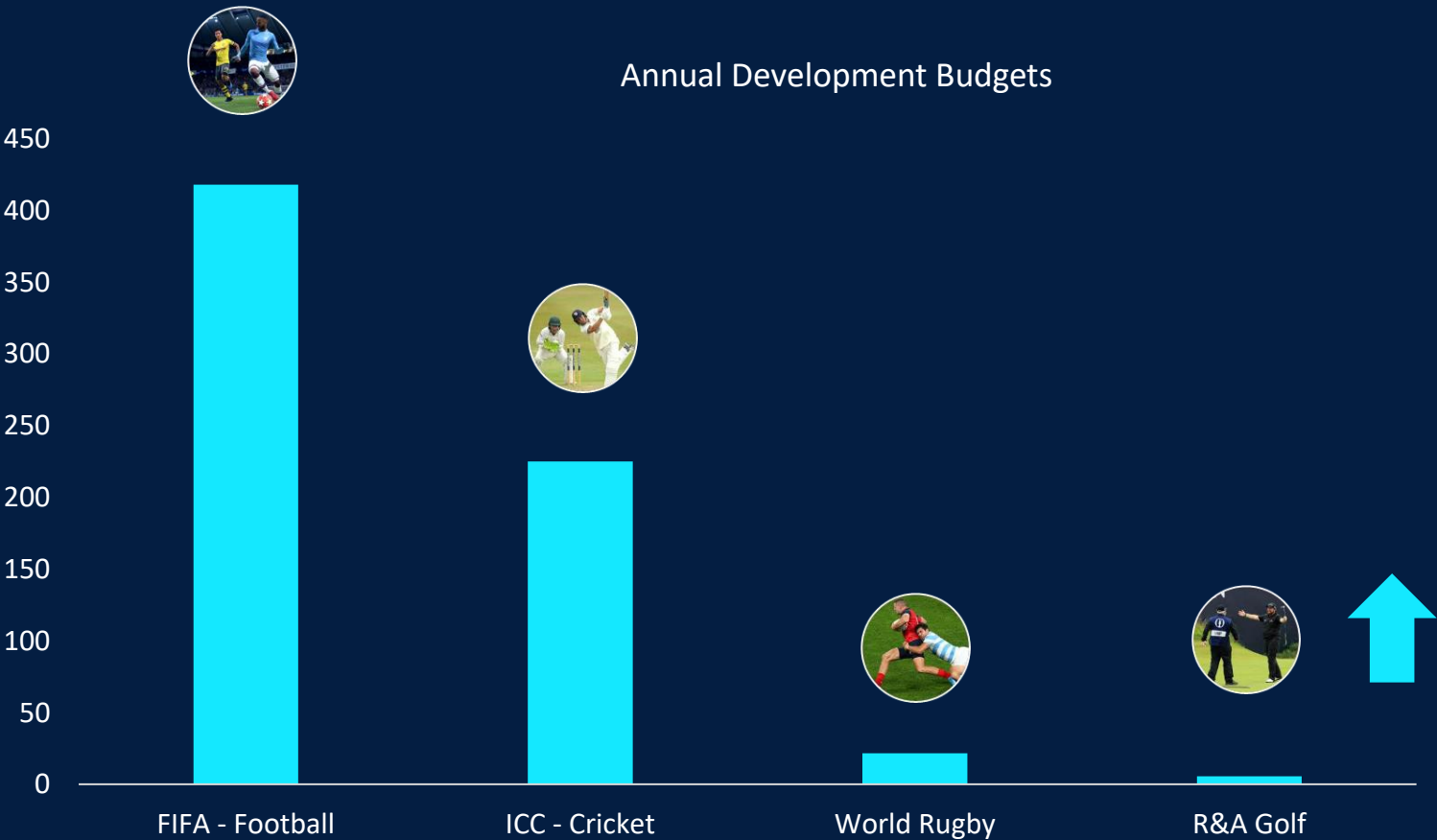
Increase collaboration and investment for greater market impact





Global Portal

Best Practice
R&A Human Resource
Global Assets
Increased Financial Resource



R&A Philanthropic Fund 2023



Questions?