Nature:

AGIC Opportunity Research

2021 Summary

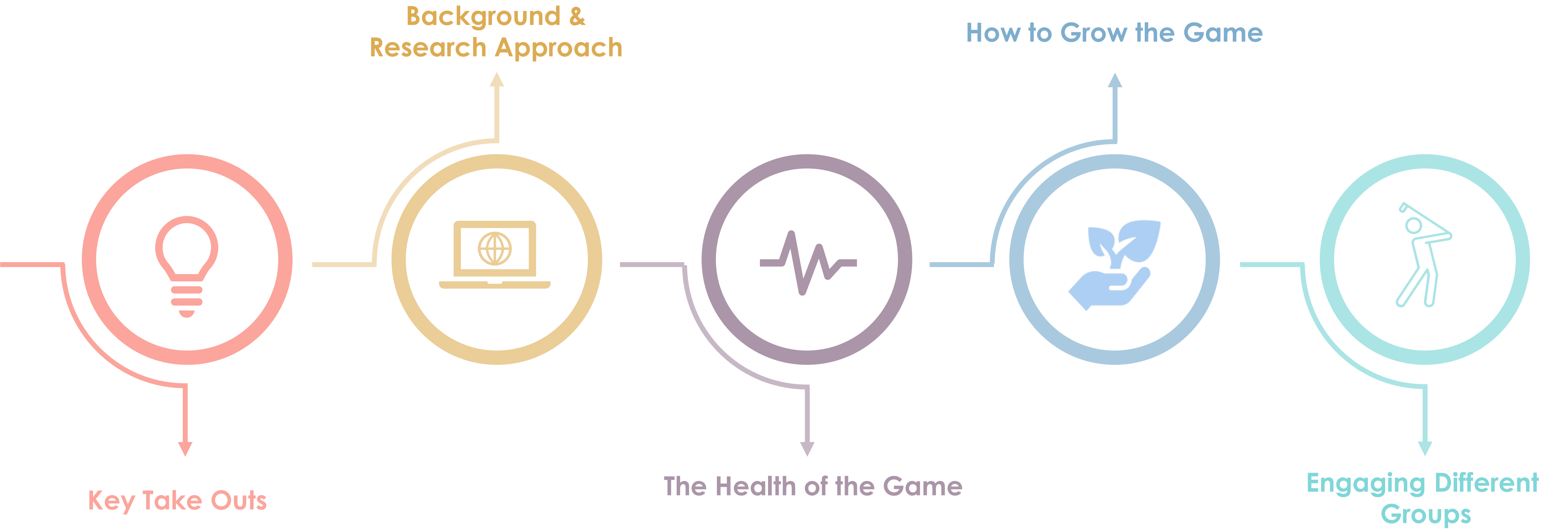
About the AGIC

The Australian Golf Industry Council (AGIC) was established in 2006 as a group comprising all of the key bodies of the golf industry in Australia, designed to work together for the common good of the game and the industry.

The Council is made up of representatives from:

- Australian Sports Turf Managers Association
- Australian Sporting Goods Association
- Golf Australia
- Golf Management Australia
- Professional Golfers Association of Australia
- Public Golf Facilities Australia
- Society of Australian Golf Course Architects
- Women's Professional Golfers Association Tour of Australasia

Report Roadmap



Key Takeout's

Executive Summary

Health of the game

The game is in good position to grow

- In its various formats, golf is well-positioned to take advantage of Australians' needs as we emerge from COVID-19.

Participation is up

- Golf participation has grown in recent years, expediated by the game's enhanced relevance in a post-COVID environment.
- However, golf's biggest participation challenge lies in converting more females to play rounds of golf.

Chance to improve engagement/fandom

- Golf viewership is lower than other sports, hampered by a perceived lack of excitement and sociability, particularly amongst females.
- Working in the game's favour is the 'star power' of players and the ability for those not close to the game to follow/understand.

How to grow the game?

Key difference in what drives different groups

- 'Fun' is a top driver across groups and activities. However, what drives this perception is very different between current course players and those using alternative formats.
- Be conscious of this nuance, so that we can better tailor activity/efforts to help move groups along their golf journey.

Talk to golfs ability to connect

- When trying to get more new participants into the sport talk to its ability to connect & excite.
- Showcase easy ways to get involved.

Showcase its ability to challenge

- When dealing with the already engaged, promote golf's ability to improve mental/physical health and challenge oneself.

Continue to invest in public facilities

- All groups feel that more/better public golf facilities would help grow the game.

How to better engage different groups?

Drive word of mouth amongst current players

- While many started playing because of friends or family, most have not extended this welcome themselves.

Youth pathway is critical

- Shorter versions of the game, quicker speed of play and more casual options are all potential drivers of youth participation.

Make membership work for casual players

- Creating a clear path to membership through group & flexible options has the potential to drive growth.

Increase frequency of casual round players

- Making casual round players play one of two rounds a year is a huge potential prize. Give them easy ways to do so, through more casual and shorter formats.

Driving ranges and alternative formats can help bring new participants into the sport

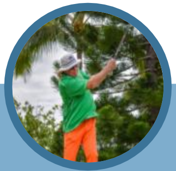
- Education about lessons at driving ranges and equipment rental can drive people to this important 'gateway' golf activity.
- Continue to invest in alternative formats that dial up fun and social connection.

How to better engage different groups?


Not engaged yet


Alt Players


Ball Hitters


Round Players


Members

Accessibility and affordability is key to driving engagement for all groups

Talk to golfs ability to connect

Continue to support new and exciting formats

Showcase the social aspect of more traditional activities

Make driving ranges more accessible, through easy to access lessons and equipment hire

Offer new on course formats & continue to invest in more public facilities

Prioritise making as many current golfers advocates as possible

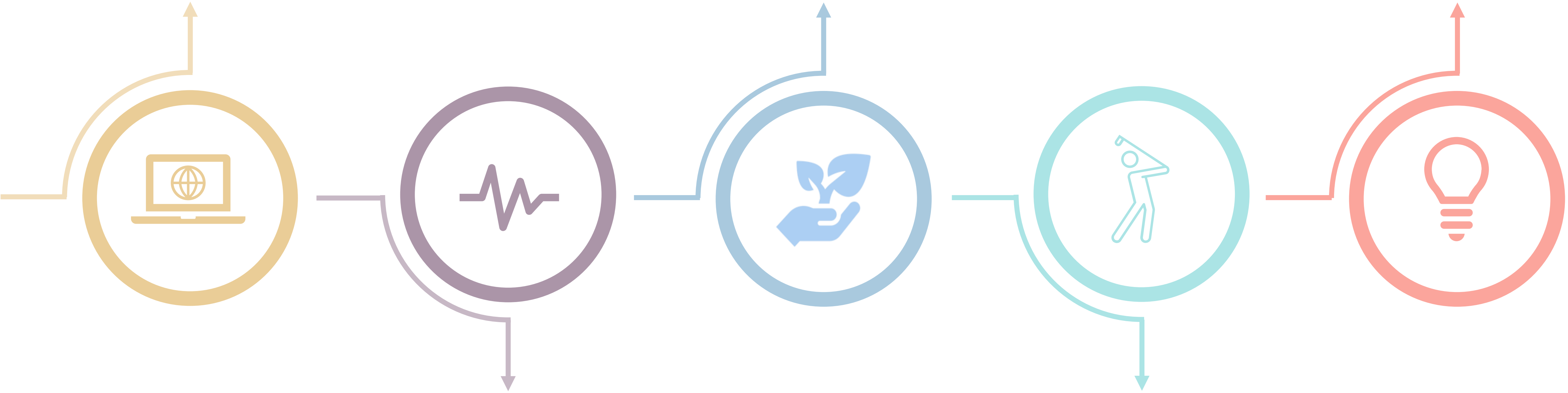
Offer more flexible formats and group options

Make membership more flexible & accessible

Nature:

Background & Research Approach

Report Roadmap



Background & Research Approach

The Health of the Game
How is golf positioned relative to other sports?

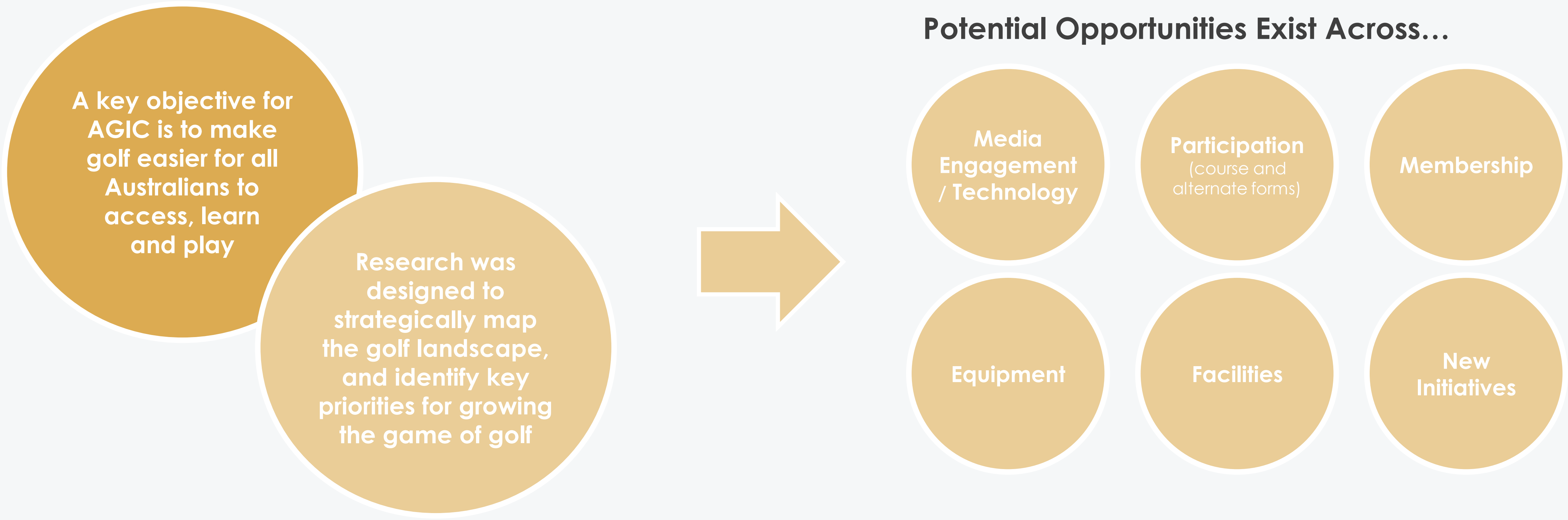
How to Grow the Game
What are the opportunities to grow golf?

Engaging Different Groups
How can we unlock opportunities amongst players and non-players?

Key Take Outs

Nature:

The purpose of this research is to provide a central source of information to guide AGIC's future strategy.



Nature:

A similar study was done in 2015; since then the AGIC has had access to additional data sources.

2015 research sized the golfing landscape and looked at different themes influencing participation

The 2021 is designed to track the sizing and themes, but build on this work to provide an updated and more comprehensive view of key priorities

New data sources since 2015…

- AusPlay Participation Studies
- Detailed Member Participation Studies
- Audience Segmentation
- Digital Journey Mapping

Nature:

Approach

Research Approach

Sample

An online survey of n=1200 respondents, split into two components

1. A nationally representative sample for sizing
2. A targeted section to ensure minimums were set for specific groups

Method

Recruited from a research panel, participants were invited to partake in a 15-minute online survey.

Questionnaire Design

Our questionnaire covered 5 key areas

Profiling & Sizing

- Map & size the current golfing landscape

Current Motivators

- How did they get into their relevant form of golf?
- What triggered this behaviour?

Knowledge & Experience

- What is their current experience like?

Current Barriers

- What is preventing them from playing more golf?

Potential Facilitators

- What could be done to get them to engage more?

Questionnaire Design

Respondents were prompted with specific questions based on who they are

Time	Survey Flow	Audience	Use
1m	Intro	First two sections were asked of all 1200 respondents	To determine groups & sizes
6m	Profiling & Sizing		
2m	Current Motivators	Respondents were asked specific questions based on what group they were allocated to (i.e. Members, Ball Hitters, Round Players etc.)	Provide detailed insight specific to each group
2m	Knowledge and experience		
2m	Current Barriers		
1m	Potential Facilitators		
1m	Additional Profiling Information	Final section asked of all 1200 respondents	Profile all

Nature:

The Health of the Game

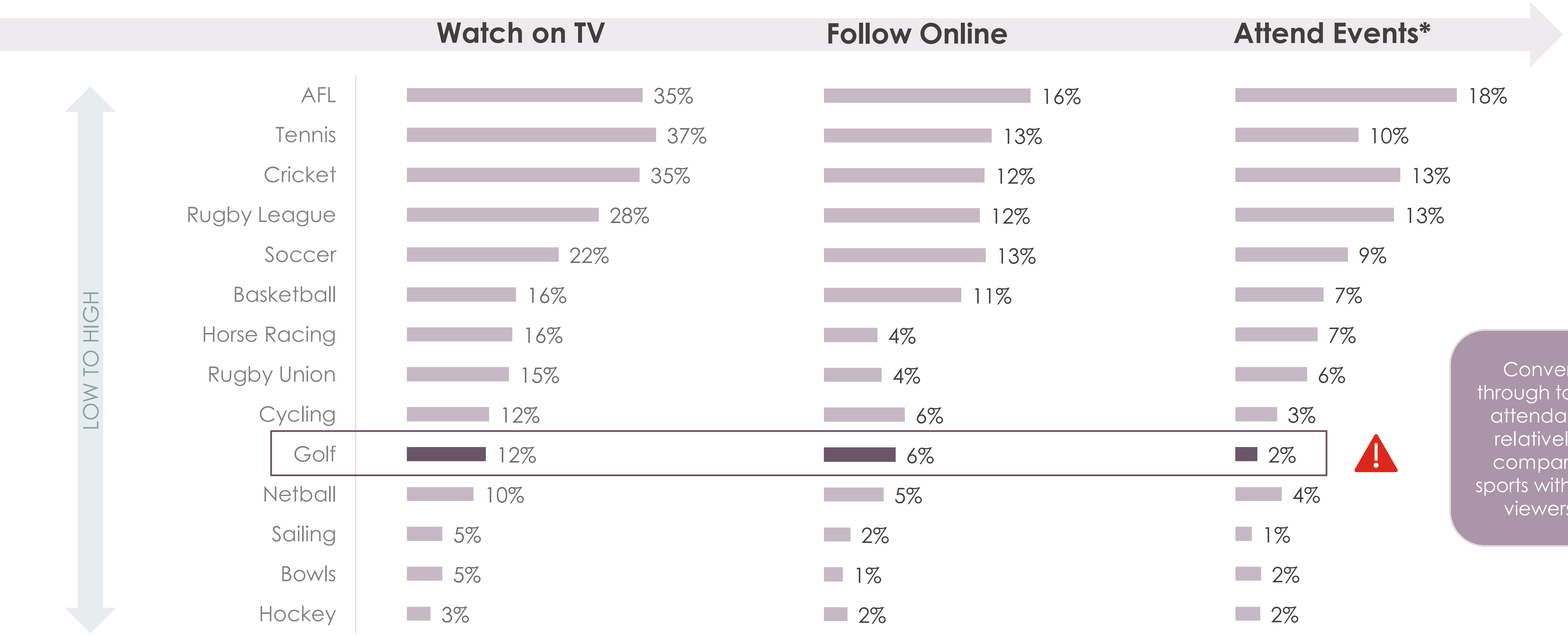
How is golf positioned relative to other sports?

In its various formats, golf is well-positioned to take advantage of Australians' needs as we emerge from COVID-19.

However, to truly unlock growth potential golf must address barriers preventing more female/youth participation and engagement.

Engagement with golf via TV, online and physical channels is lower than other sports.

Fan Engagement with Golf vs Other Sports*



Conversion through to event attendance is relatively low compared to sports with similar viewership.

Please note these figures should be viewed as indicative, as they were gathered at a specific point in time and will be somewhat impacted by COVID-19 restrictions

Please refer to Appendix 1, for breakdown by Gender, Age, Metro/Regional

V1. Which of the following sports (if any) do you currently...
Base: Nationally representative sample of Adult Australians n=500

Nature:

Access to the players is a key reason to watch golf, particularly on TV. However, the game falls behind other sports in terms of its length, but also its perceived socialisation credentials.

Engagement with Golf - *Index of golf media engagement drivers vs average of all other sports*

Relative Strengths: Key Drivers of Golf Engagement

Cross-channel drivers

1. There are players I love to watch/ follow
2. It is relaxing
3. It is exciting
4. It is easy to understand

Channel-specific

Television

- The interaction with players is interesting
- The commentary is entertaining

In Person

- It is easy to access

Relative Weaknesses: Key Drivers of Golf Engagement

- **It goes for the right amount of time**
- **It is a good way to connect with friends and family**
- **It is family-friendly** *(for attending in person)*

V2. Why do you (WATCH/FOLLOW) (INSERT SPORT) (INSERT ACTIVITY)?
Base: Nationally representative sample of Adult Australians n=500

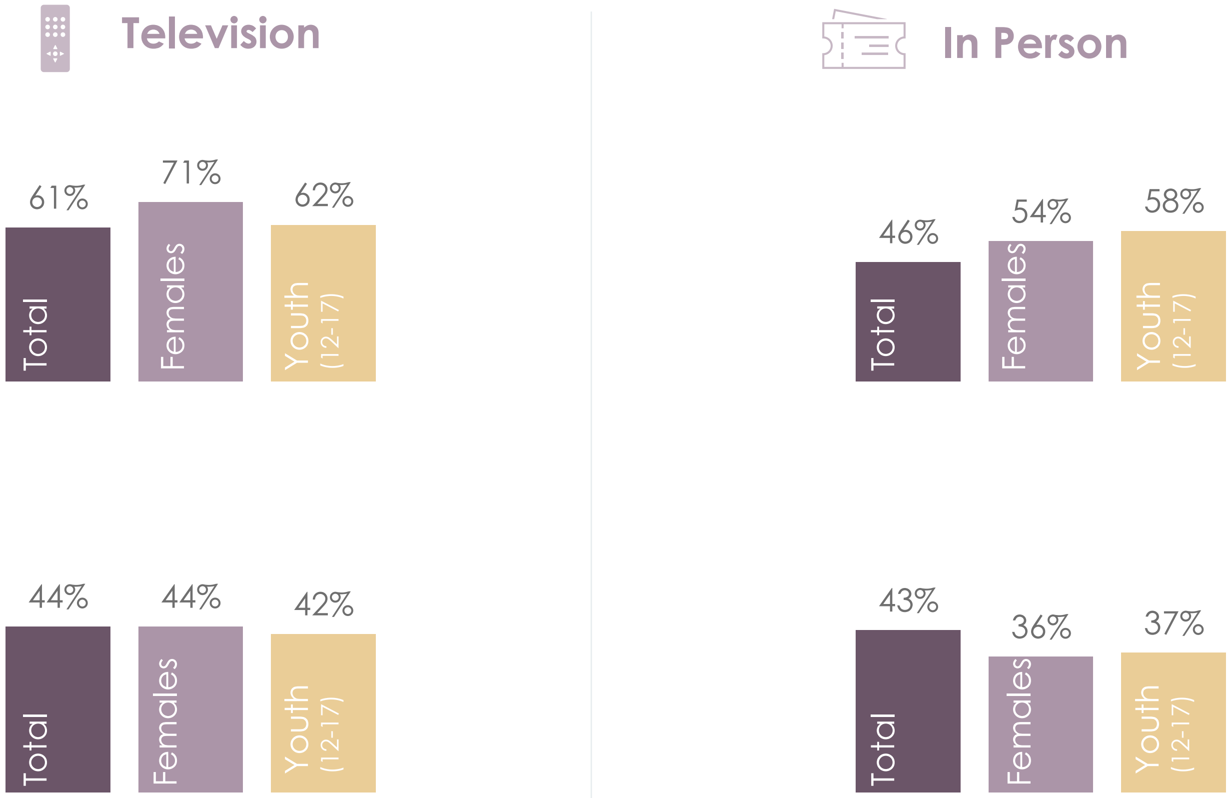
Nature:

Lack of excitement is the key barrier to golf viewership and attendance, particularly amongst females and teenagers.

Key Barriers to Engaging More with Golf

#1 Barrier
It's not exciting

#2 Barrier
It goes for too long



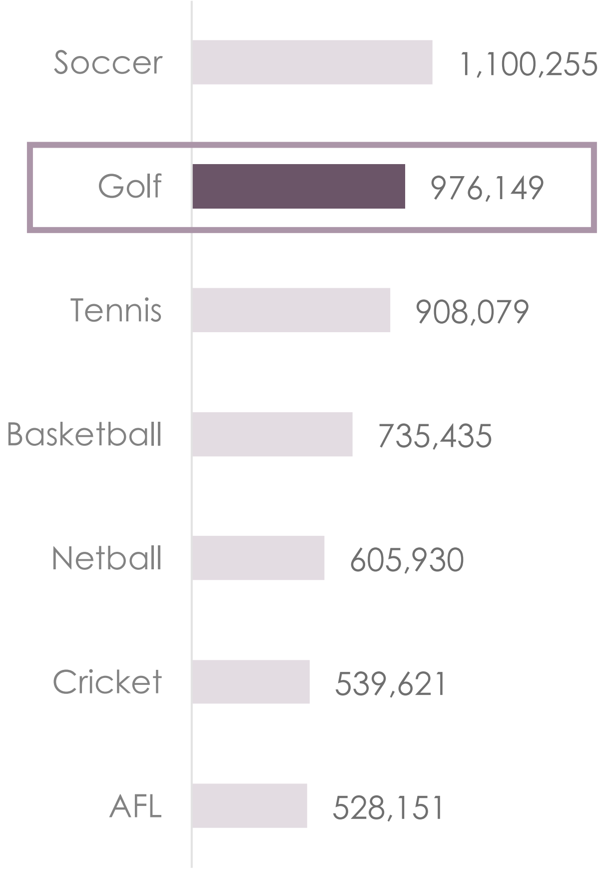
No other barrier is prevalent for more than a quarter of people

V3. Why do you not (INSERT ACTIVITY) (INSERT SPORT) (INSERT ACTIVITY)?
Base: Nationally representative sample of Adult Australians n=500; Children (n=282)

In comparison to AusPlay data from 2019, there are signs that golf participation (on course) has increased to beyond 1.2 million in 2021.

Australian Adult Participation (2019)

AusPlay Data



Australian Adult Golf Participation (2021)

Claimed Survey Data

~1,245,000

course players

(private and public courses)

+

~1,940,000

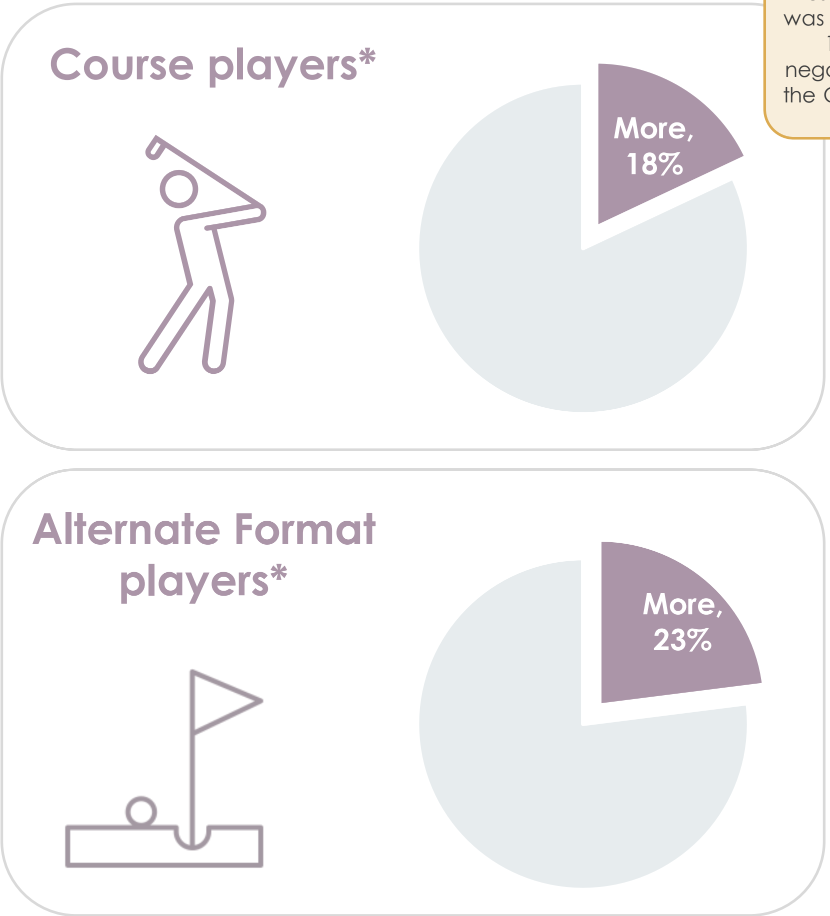
alternate format players*

(*includes Driving ranges, Top Golf, Holey Moley, Mini Golf/Putt Putt, Indoor, Big Hole Golf , Speed Golf, Foot Golf, Disc Golf)

B2. Which of the following activities…Have you ever done? Have you done in the last year?
Base: Nationally representative sample of Adult Australians n=500

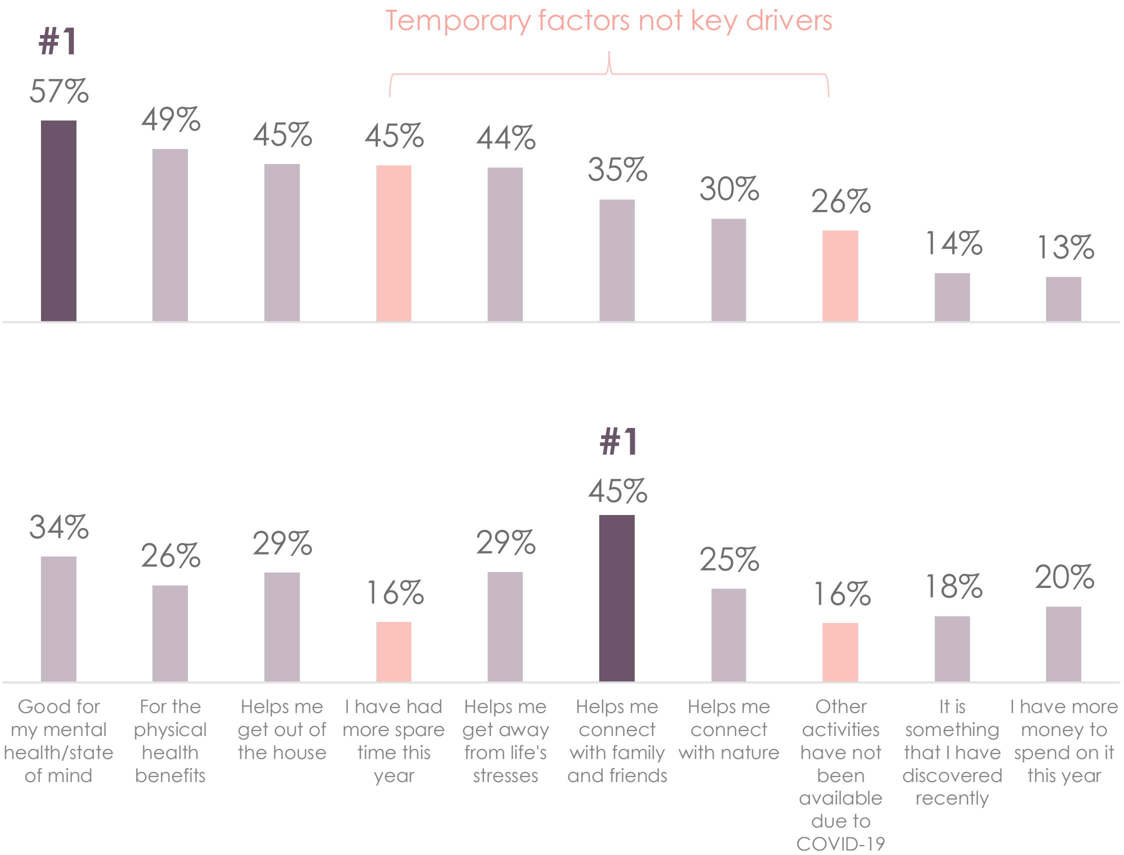
Golf appears to have benefitted from the fallout (rather than circumstantial factors) of COVID-19 – with different formats appealing to people in the search for improved mental health and social connection.

Change in Participation Frequency (Last 12 Months)
Nature Data



AusPlay data suggests golf was one of the sports (in top 10 participation) less negatively impacted during the COVID lockdown period (Mar-Jun 2020)

Top 3 Reasons for increasing frequency
Nature Data



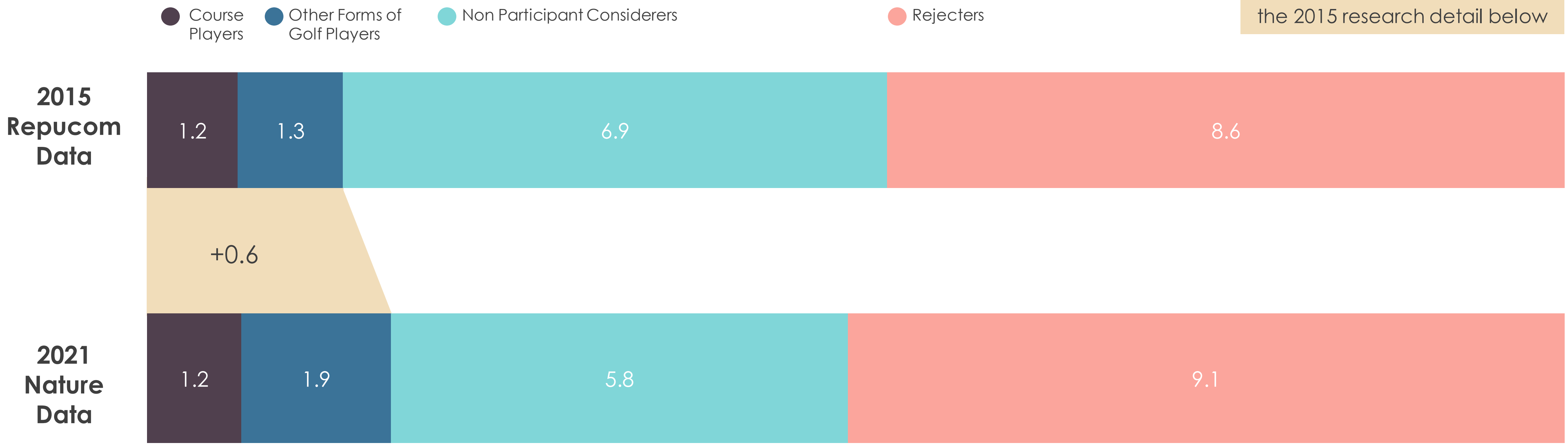
C2. Compared to this time a year ago, are you doing the following activities (more or less) frequently….?
Base: Nationally representative sample of Adult Australians n=500

Nature:

When compared to the last study, we have seen an increase overall in participation in golf.

Australian Adult Golf Participation Breakdown
(Millions of people)

Note: In 2021 we used a tighter lens on consideration than in the 2015 research detail below

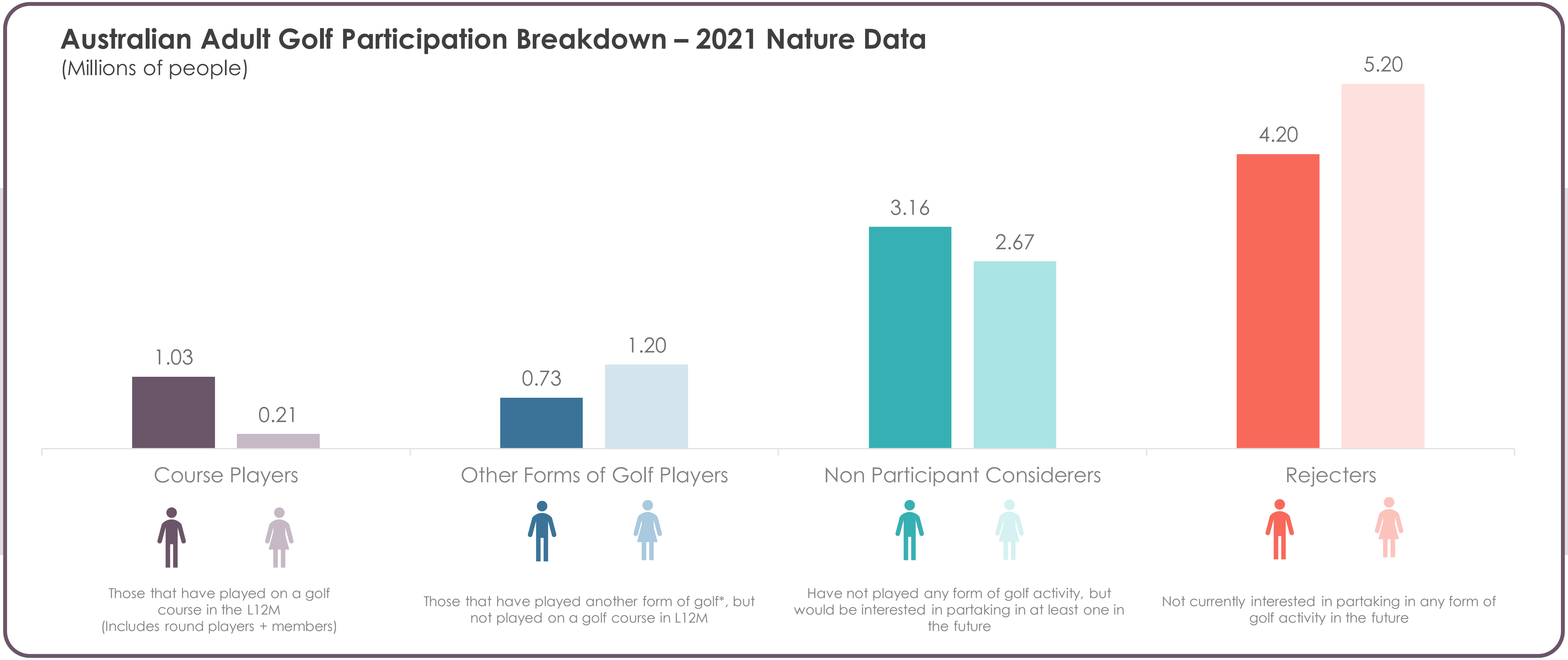


Questions used to determine 'rejectors'
2015 - Which of the following activities would you never consider participating in, in the future? (Rejector if did not select 'golf')
2021 - Which of the following would you be **interested** in participating in, in the future? (Rejector if did not select any golf activity)

Base: Nationally representative sample of Adult Australians n=500

Nature:

While Female representation is strong within alternative formats, conversion through to playing on course is low.



Base: Nationally representative sample of Adult Australians n=500
*Includes Top Golf, Holey Moley, Mini Golf/Putt Putt, Indoor, Big Hole Golf , Speed Golf, Foot Golf, Disc Golf & Driving Range

How to grow the game

What are the opportunities to grow golf?

To grow the game of golf there is a need to not only target new audiences, but also to position the game differently to them.

A dual strategy is required to grow the game of golf amongst both core players and the large addressable market.

Nature:

Defining our groups of interest.

Not engaged yet

5,800,000 Australians

Have not done any golf activity in the last year but are interested in doing so

Alt Players

1,645,000 Australians

Have been to an alternative form* in the last year but not other activities

Ball Hitters

295,000 Australians

Have been to a driving range but not played a round in the last year

Round Players

865,000 Australians

Have played a round of golf in the last year but not a member

Members

380,000 Australians

Currently a member of a golf club

Both have held a golf club in last 12 months

Both have stepped onto a golf course in last 12 months

*Includes Top Golf, Holey Moley, Mini Golf/Putt Putt, Indoor, Big Hole Golf , Speed Golf, Foot Golf, Disc Golf

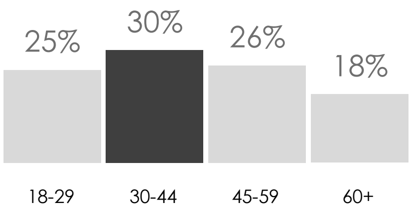
Note: Please see slide 58 for detail behind how all groups were identified

The Golf Landscape

Not engaged yet

5,800,000 Australians

43.4 Average Age



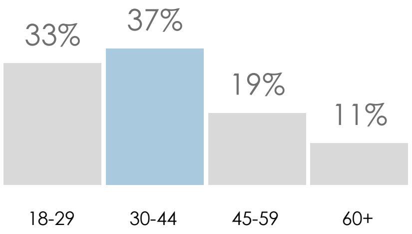
54% Male | **46%** Female

$0* per year on golf

Alt Players

1,645,000 Australians

39.8 Average Age



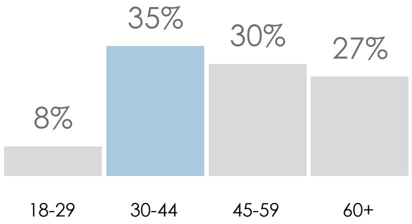
34% Male | **66%** Female

$49~$108* per year on golf

Ball Hitters

295,000 Australians

48.8 Average Age



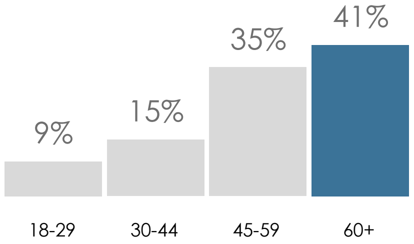
59% Male | **41%** Female

$115* per year on golf

Round Players

865,000 Australians

54.5 Average Age



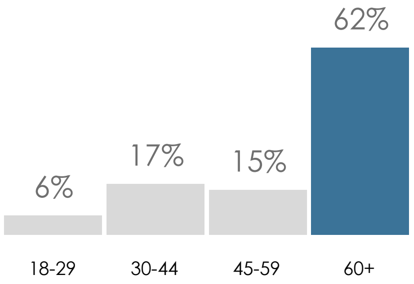
85% Male | **15%** Female

$470* per year on golf

Members

380,000 Australians

59.1 Average Age



78% Male | **22%** Female

$1,700* per year on golf

*Spend is based on a trimmed average from the following question: Approximately how much would you say you spend in a year on the following golf related items?

Nature:

Given all golf activities are fundamentally leisure activities, 'fun' is a top driver across groups and activities.

Members

#1

74%
Driven by 'fun & enjoyment'

"Fresh air and a bit of **fun**

"it is great **fun** and is a terrific way to meet new people.

Round Players

#1

71%
Driven by 'fun & enjoyment'

"Because it is quite **fun** even if you are not good at it

"Great **fun**, easy to play and keep fit

Ball Hitters

#2

33%
Driven by 'fun & enjoyment'

"**Fun way to start** off playing golf; doesn't take up a lot of time

"Its a fun and **enjoyable sport** and **exciting to learn**

Alternative Players

#1

52%
Driven by 'fun & enjoyment'

"It's **fun, local** and can be a great time to catch up with **friends and family**

"It's a good **fun time** for a get together at **something different**

Fun is a key driver across all groups

Qrpm7. Which of the following describe why you play golf? Qmm8. Which of the following describe why you play golf?
Qmf1. Why should your friends & family who haven't joined a golf club give it a try? Qrp9. Why should your friends & family who haven't played a round of golf give it a go?
Base: Various

The ability to connect with family and friends is a key motivator for those participating in non-course activities.

Triggers

Ball Hitters

I wanted to practice	38%
For the fun and enjoyment	33%
So I could play with my family	27%
So I could play with my friends	24%

Alternative Players

	Mini Golf	Holey Moley
For the fun and enjoyment	63%	55%
So I could play with my family	58%	37%
So I could play with my friends	28%	47%

Connecting with family and friends is a key secondary driver

Why should others play?

"It's something **nearly everyone can do**. You **don't need to take it seriously** so it can be a bit of family and friends catchup fun.

"Fun & Enjoyment with **your friends/family**

"It would be a good opportunity to **spend time with family** and friends. **Good for practicing** golf.

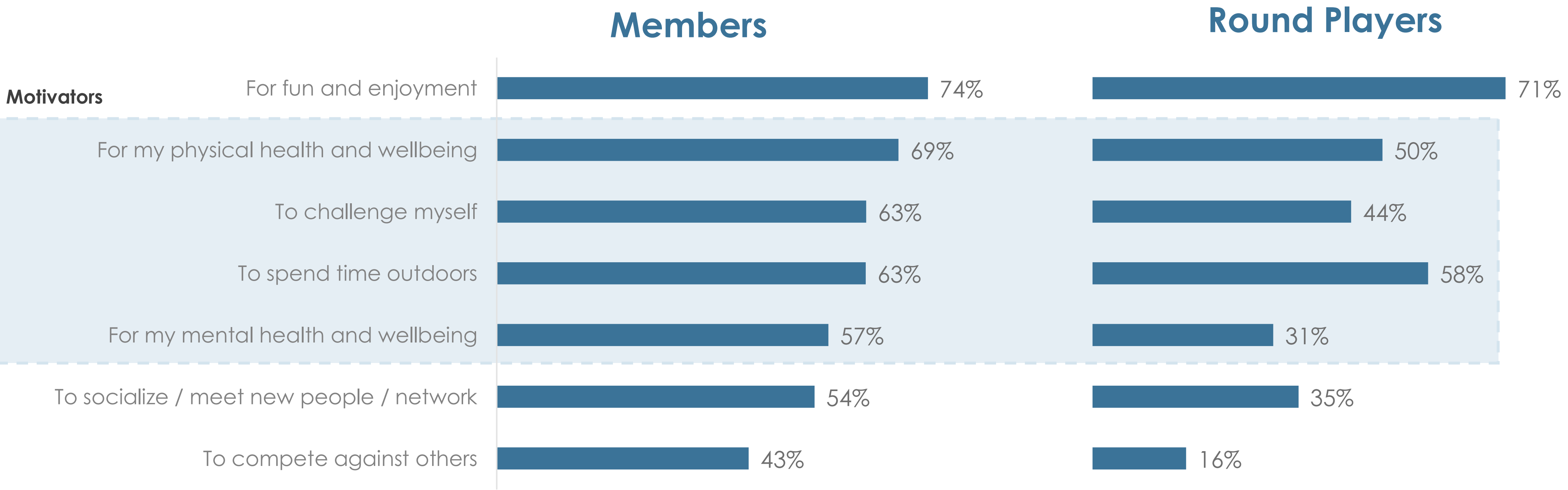
"It's lighthearted fun with **family/friends**

"**A reasonably priced fun way to play golf with family and friends**

Qbhm3. What first prompted you to start go to the driving range? Qapm3. What first prompted you to start go to…? Qapm6. Why should your friends & family who haven't (INSERT ACTIVITY) give it a go?
Base: Total Ball Hitters (n=161) Mini Golf (n=173) Holey Moley (n=44)

Please refer to Appendix 2 & 3 for breakdown by Gender, Age, Metro/Regional

Fun and enjoyment has a slightly different meaning for members and round players, who love how golf improves their overall health and challenges them.



Additional key drivers for those who have played on a course

Mental Health

Physical Health

Challenge & Competition

Qmm8. Which of the following describe why you play golf? Qrpm7. Which of the following describe why you play golf?
Base: Total Members (n=157) Base: Total Round Players (n=224)

Please refer to Appendix 4 & 5 for breakdown by Gender, Age, Metro/Regional

This came through very clearly in their reasons why they would suggest taking up the game to others.

Mental Health

"Fresh air, **mental well being** and general fitness.

"Golf is a great **way to get rid of built-up tension and stress** if you play it in the right way. It is healthy it is challenging, and it is enjoyable.

"I find its a good way to **unwind relax and mentally clear my head.**

Physical Health

"Its an outdoors sport and its a **healthy** way to get out and about.

"Fore **health and mobility.**

"It is a very good way to get some **fresh air and exercise** while challenging yourself.

"**Healthy exercise** and fun to hit about.

Challenge & Competition

"Great **challenge** and gives back a lot of personal satisfaction.

"It is a good sport for gentle exercise and to **challenge yourself to even do better.**

"To enjoy some friendly **competition** and socialize with friends.

Qmf1. Why should your friends & family who haven't joined a golf club give it a try? Qrp9. Why should your friends & family who haven't played a round of golf give it a go?
Base: Total Members (n=157) Base: Total Round Players (n=224)

This difference in drivers means we need to tailor our activity to help move groups along their golf journey.

A bit of fun

Not engaged yet

Driven by excitement and need to connect

Those who have played an alt format

Those who have been to a driving range

Key tension to address to shift from alternative to on course

Driven by the mental health, solitude & challenge

Round Players

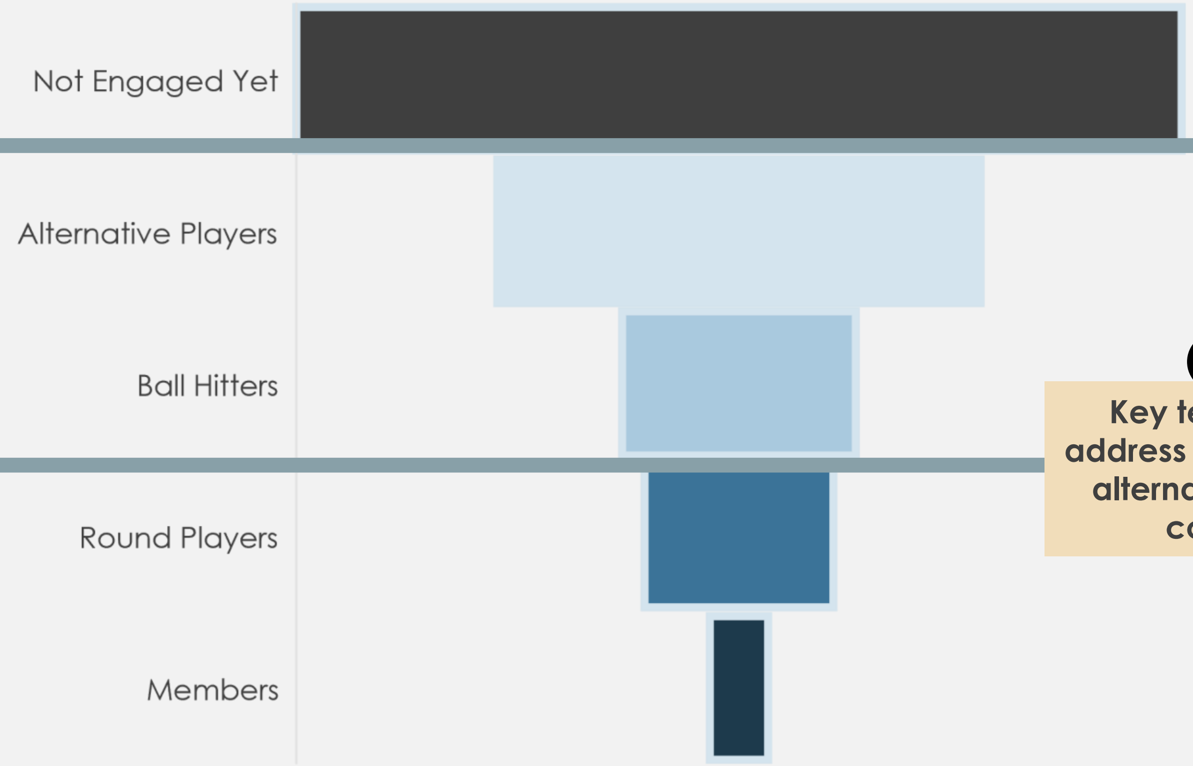
Members

A game for life

Nature:

This difference in drivers means we need to tailor our activity to help move groups along their golf journey.

Golf Journey*



Key tension to address to shift from alternative to on course

Driven by excitement and need to connect

Driven by the mental health, solitude & challenge

*Size of the funnel is not 100% proportionate to the size of the segment

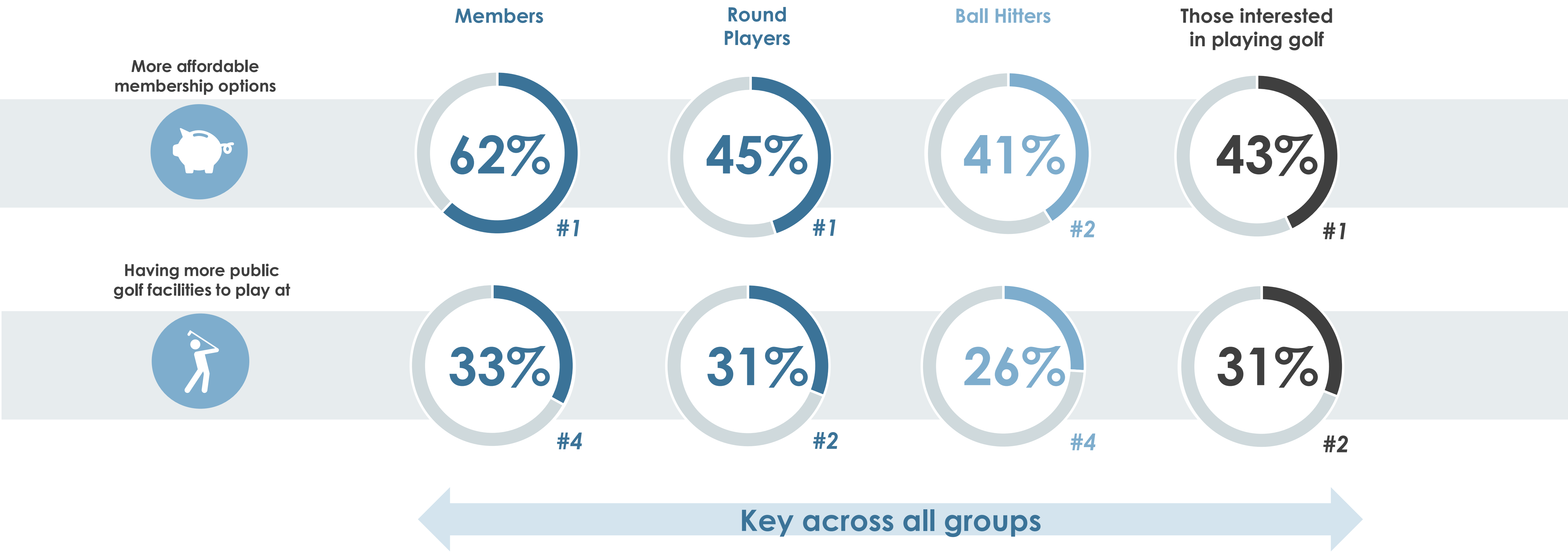
Engaging Different Groups

How can we unlock opportunities amongst players and non-players?

1. Find ways to strengthen golfer 'word of mouth'
2. Continue to invest in a youth pathway, with a focus on girls
3. Use flexible 'memberships' and game options to attract people to courses more often
4. As the 'gateway' format, invest in driving ranges to make the game of golf more accessible
5. Continue to invest in new and alternative formats; dialing-up excitement and connection

Access and affordability will be central to growing golf amongst all groups.

Potential Facilitators for growing Golf

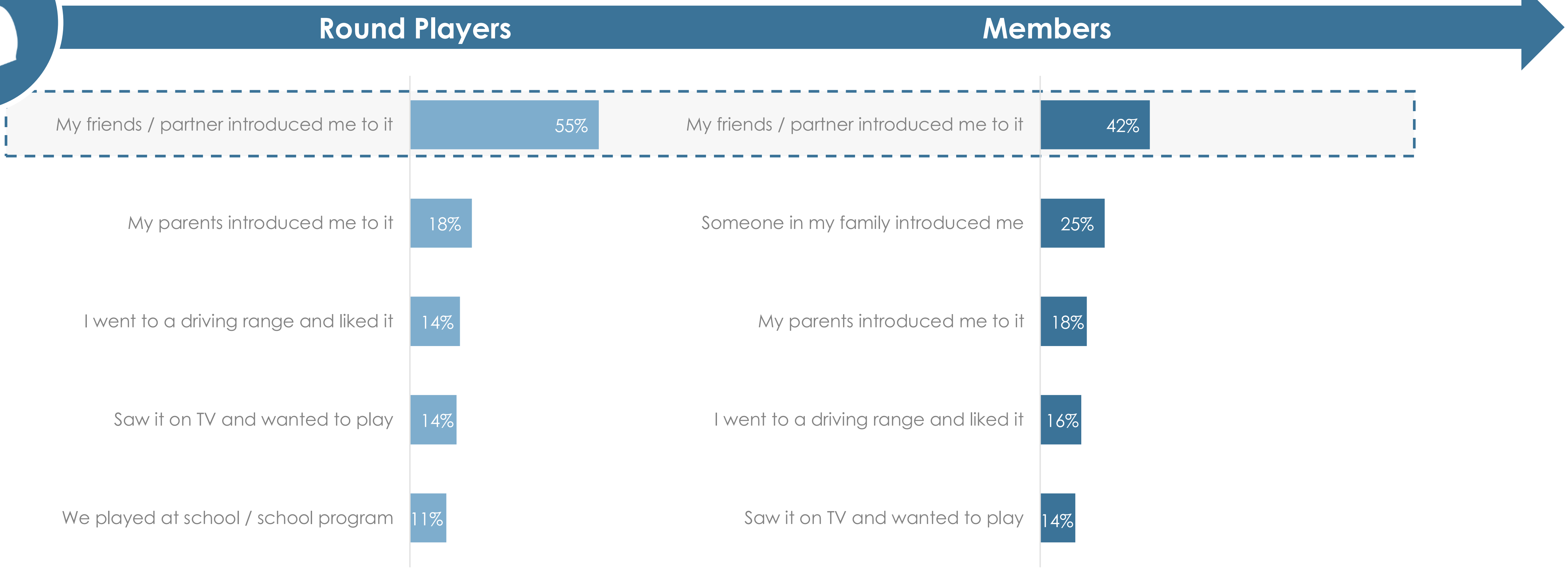


Qmf1. Generally speaking,...which of the following do you think would help improve golf? Qrpf1. Which of the following do you think would help you play more golf?
Qapf1. Which of the following do you think would help you play more golf? Qnef1. Which of the following would make you more likely to try playing rounds?
Base: Total Members (n=157), Base: Total Round Players (n=224), Base: Total Ball Hitter (n=161) Base: Total not engaged by would consider the playing a round of golf (n=137)

Please refer to Appendix 6,7,8 & 9 for breakdown by Gender, Age, Metro/Regional

Friends and partners are identified as key triggers for getting into golf for both members and round players.

Triggers to Start Golf



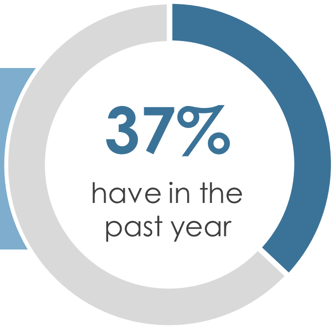
Qmm5. What first prompted you to start playing golf? Qrpm4. What first prompted you to start playing golf?
Base: Total Members (n=157) Base: Total Round Players (n=224)

Please refer to Appendix 10 & 11 for breakdown by Gender, Age, Metro/Regional

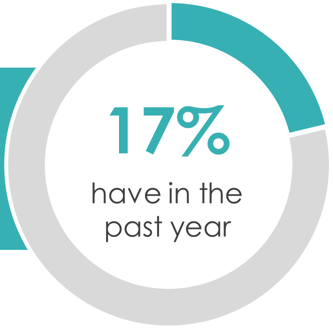
While many started playing because of friends or family, most have then not extended the welcome to their friends or family.

Have you encouraged someone to play golf?

Members have encouraged someone they know to play golf



Round Players have encouraged someone they know to play golf



Why Not?

> Some would find it **boring**. Many would find it **expensive**. People can **do their own research** and may elect to ask me questions... that's **up to them**.

> Because at my age, I have **not been able to perform as well** as I did and thus **unable to guide them along the way,** although I have suggested it to them…

> I can **barely play myself**. I am a novice and only playing or trying to keep my partner happy.

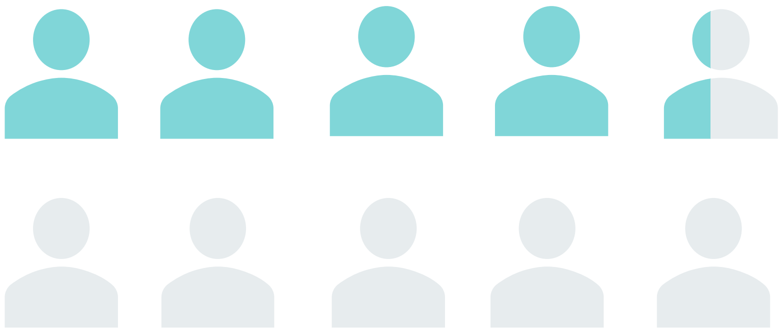
> **Too expensive**… I only played once as my friend paid and it was her birthday.

Qmb1. In the last twelve months have you encouraged/helped someone to take up golf? Qmb2. Why have you not encouraged/helped someone to take up golf?
Qrpf4. In the last twelve months have you encouraged/helped someone to take up golf? Qrpf5. Why have you not encouraged/helped someone to take up golf?
Base: Total Members (n=157) Base: Total Round Players (n=224)

Please refer to Appendix 12 for breakdown by Gender, Age, Metro/Regional

4 in 10 members started playing golf before they turned 20, reinforcing the importance of continued investment in MyGolf.

42% Of members started playing before turned 20



The earlier they started the better their handicap…

Age started	%	Average Handicap
>20	42%	15
20-29	23%	16
30-39	13%	22
40-49	13%	25
50+	9%	27

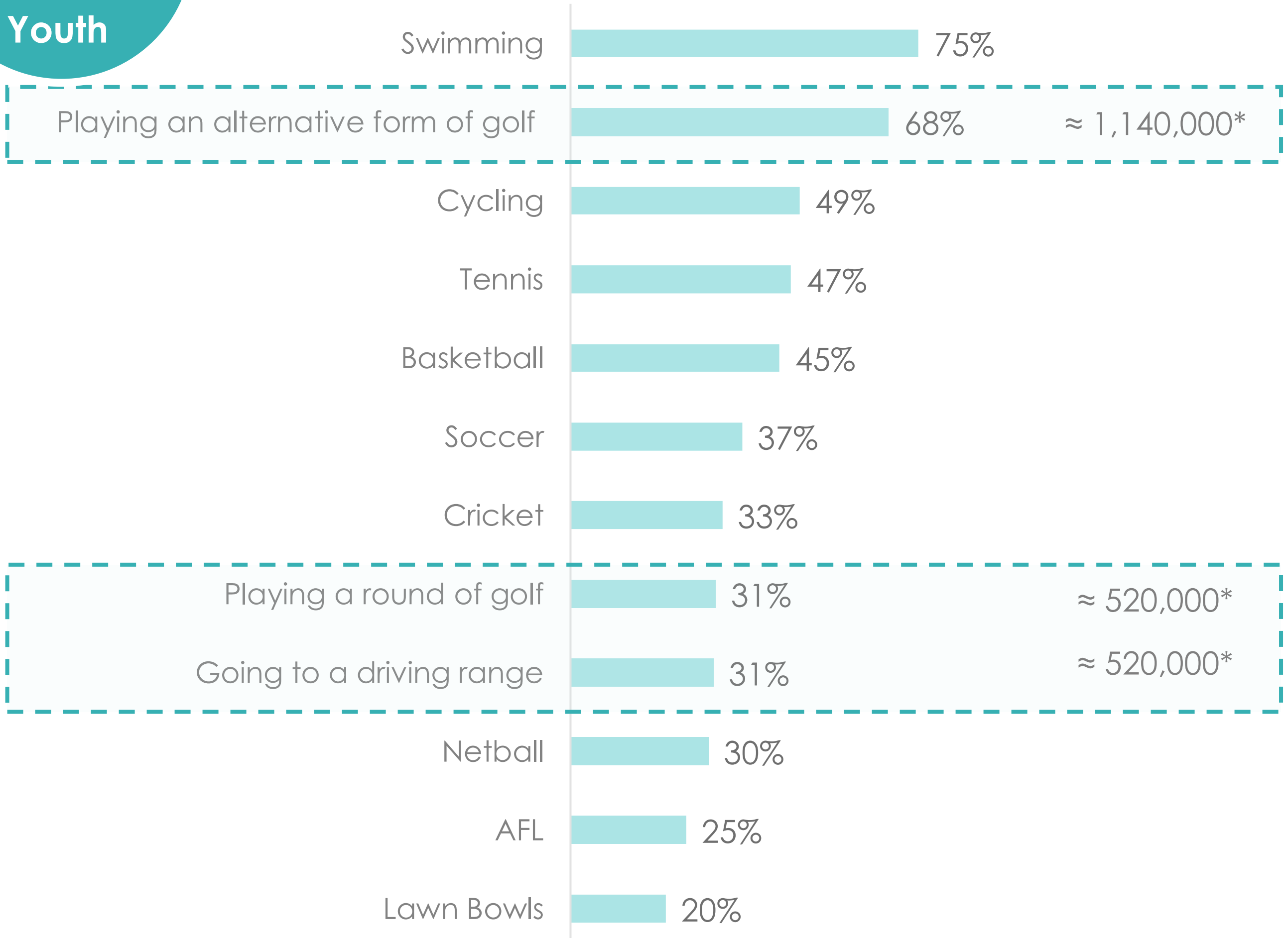
Qmm2. At what age did you start playing golf? Qmm3. What is your current Golf Australia handicap?
Base: Total Members (n=157)

Please refer to Appendix 13 for breakdown by Gender, Age, Metro/Regional

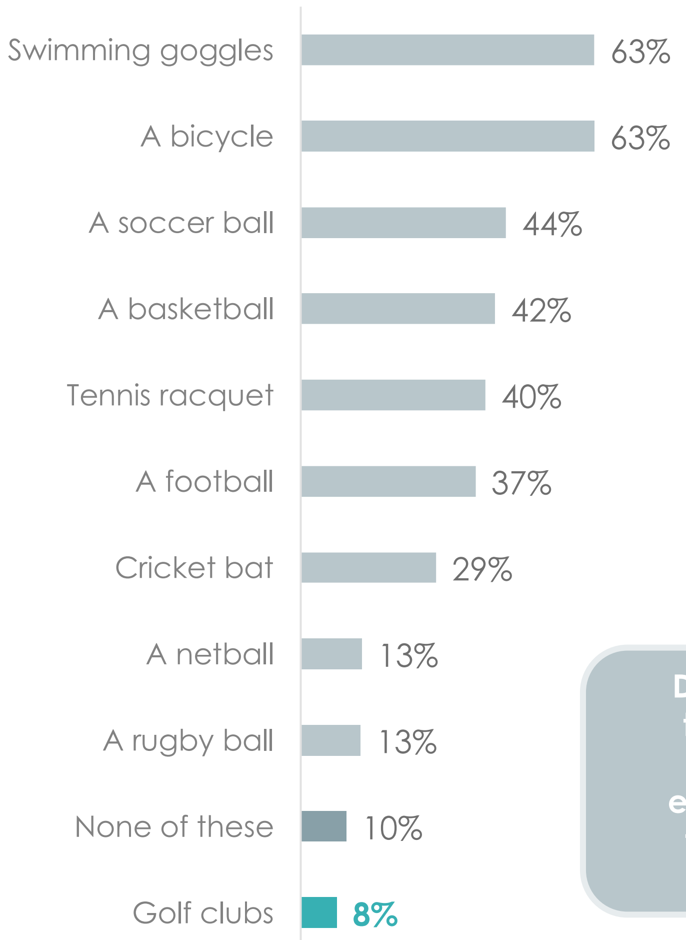
Although kids' interest in golf lags behind ball sports, there is still a healthy amount of interest despite lack of equipment being a barrier.

Youth

Interest in Golf Participation



Current Equipment Owned



Despite interest, there are more kids with no equipment at all than there are with golf clubs

Qk4. Which of the following would you be interested in participating in the future? Qk5. Which of the following do you currently own?
Base: Total Kids (n=308)
*Estimated number of potential participants between the ages of 12-17 in Australia, figures should be viewed as indicative

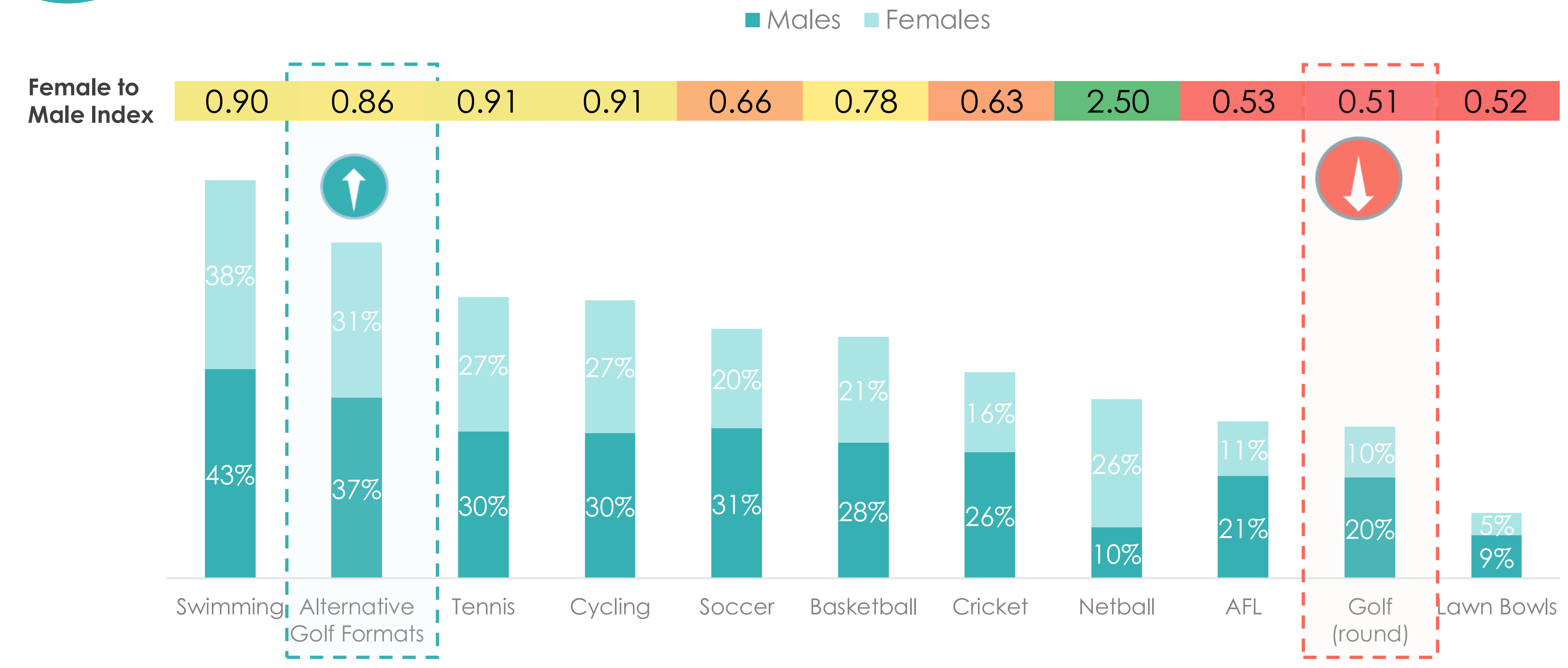
Please refer to Appendix 14 & 15 for breakdown by Gender, Metro/Regional

As we see in the older age group, girls' participation in playing traditional golf is well below that of their male counterparts. Lack of participation is not driven by lower MyGolf awareness.

Youth

Australian Youth Golf Participation Breakdown – By Gender

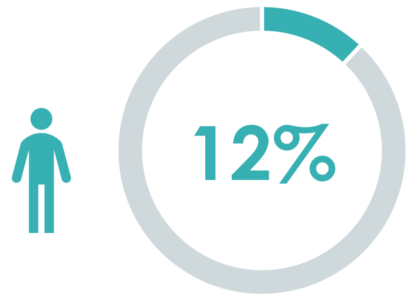
(Share of players)



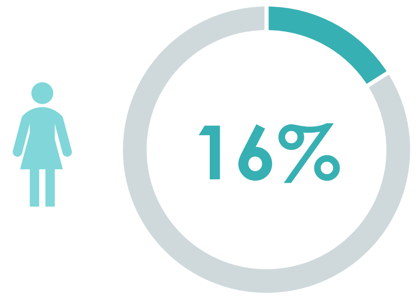
≈ **Estimated participants between 12-17**

≈ 980,000*

≈ 370,000*



Aware of the MyGolf program



Aware of the MyGolf program

Qk3a. Which of the following activities have you ever done? Qk3b. Which of the following activities have you done in the last year? Qk9. Are you aware of the MyGolf program?
Base: Total Kids (n=308), Child Gender Males (n=163), Females (n=145)
*Estimated number of participants between the ages of 12-17 in Australia, figures should be viewed as indicative

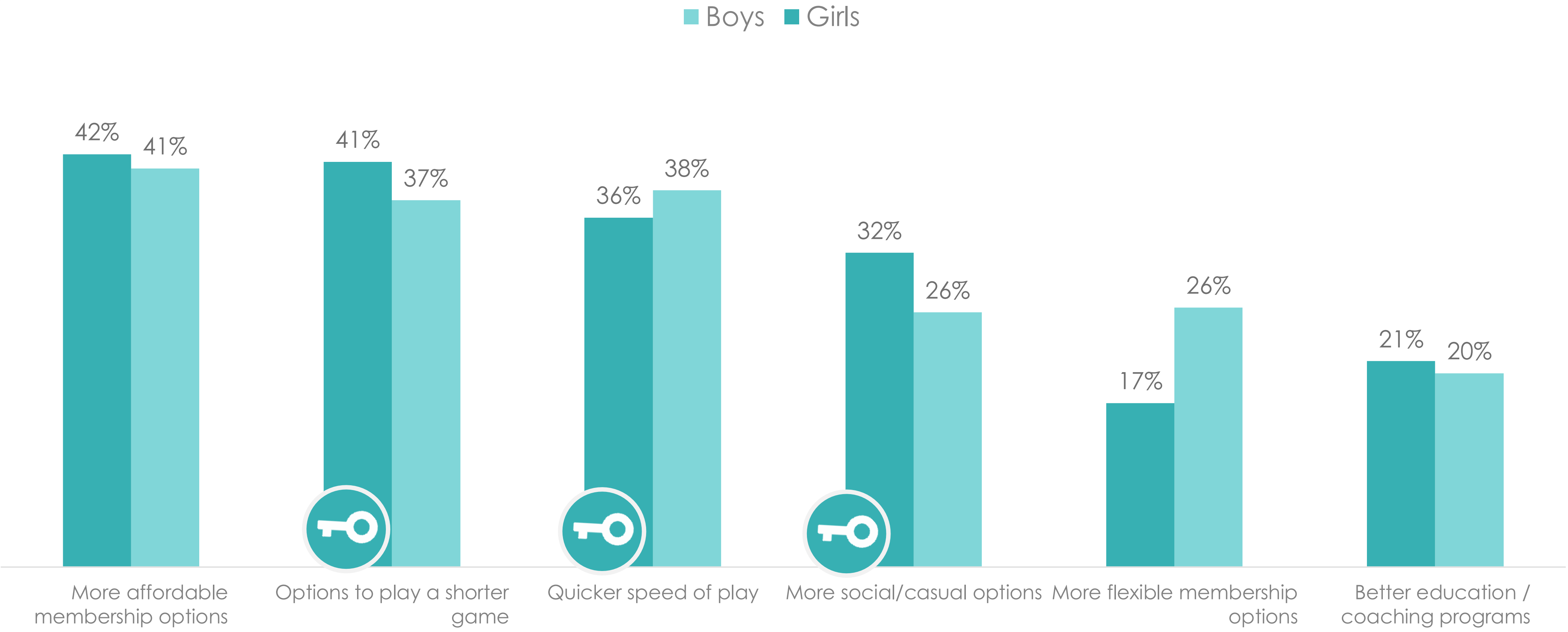
Please refer to Appendix 18 for breakdown by Gender, Metro/Regional

Shorter versions of the game, quicker speed of play and more casual options are all potential drivers of youth participation (particularly for females).

Youth

Drivers to Play More Golf – Youth

Ranked by Popularity of Drivers

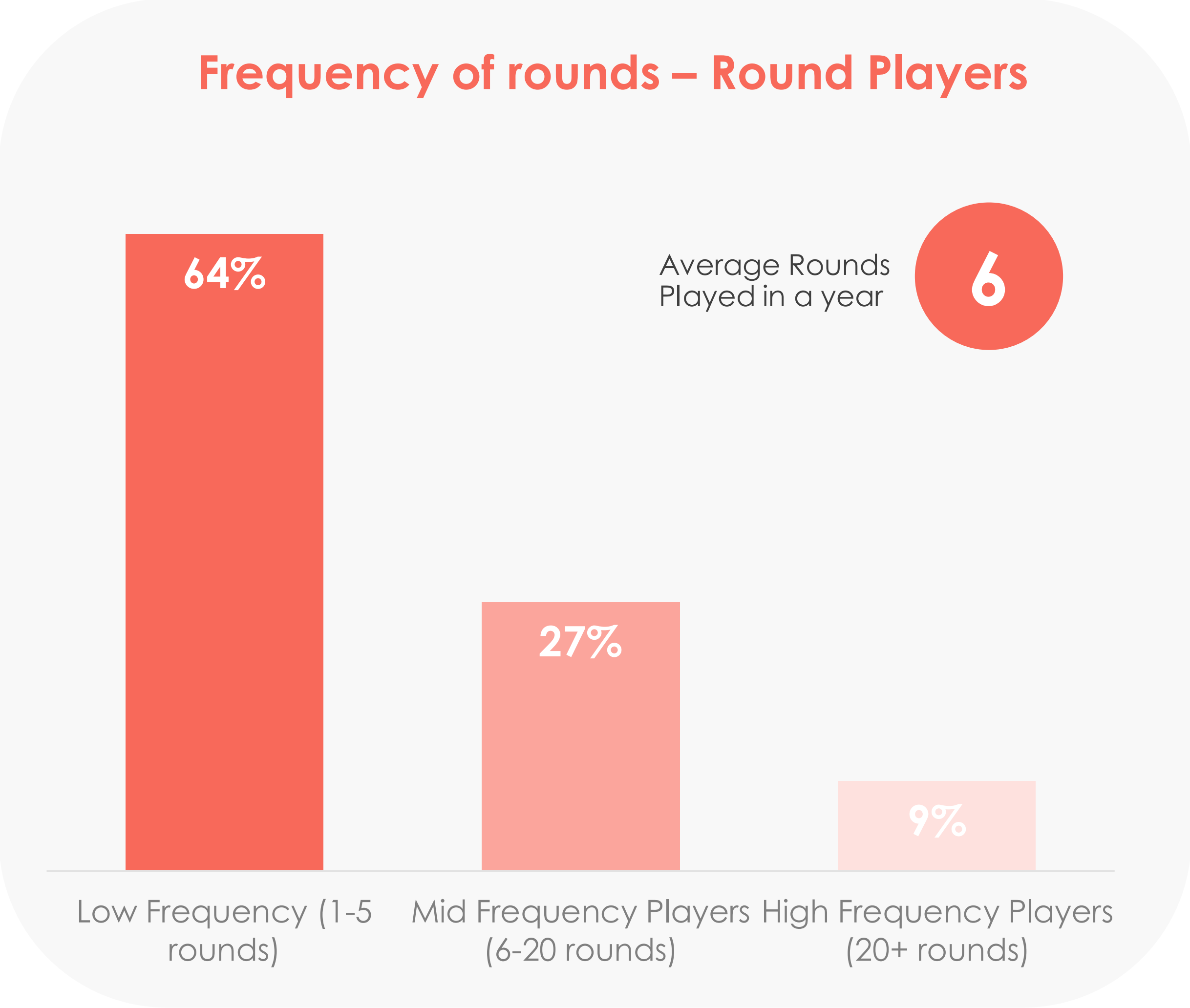


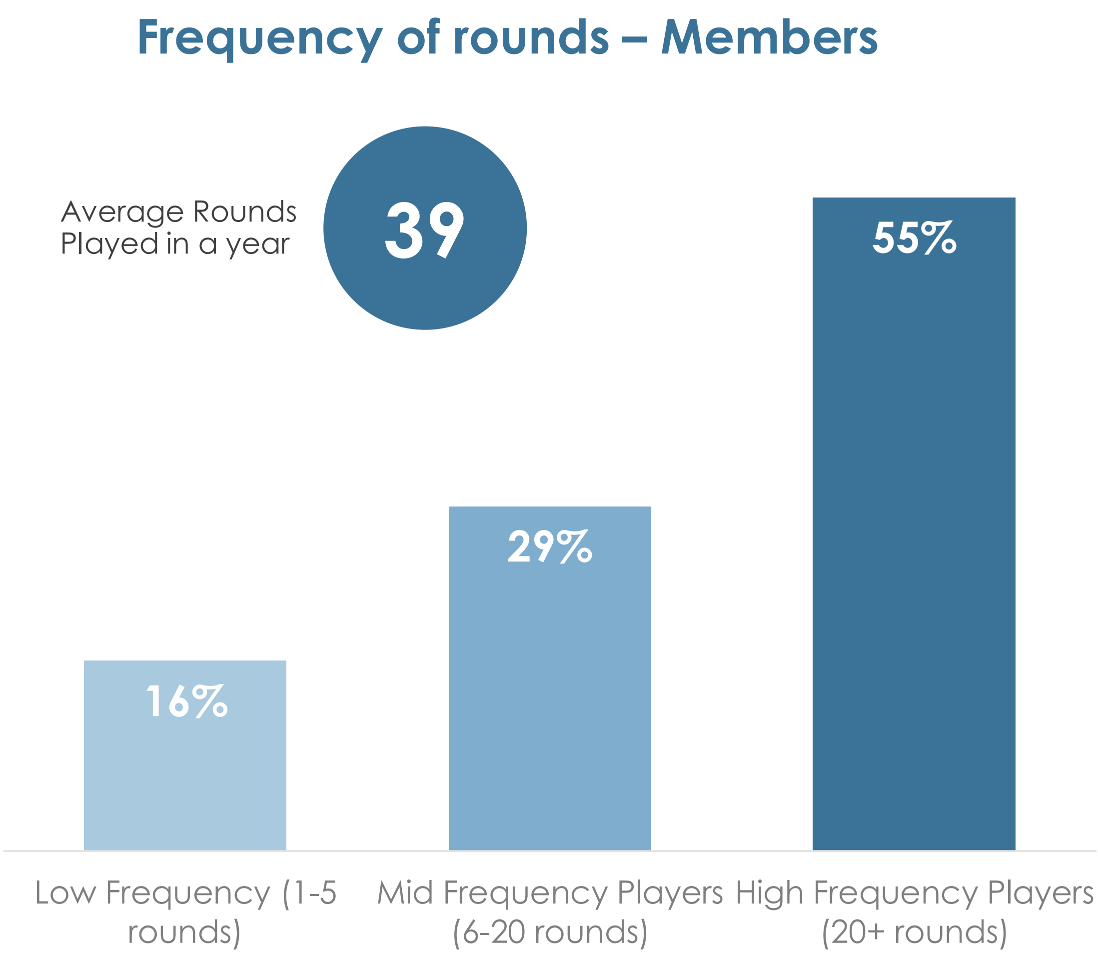
Please refer to Appendix 19 for breakdown by Gender, Metro/Regional

Qk11. Which of the following do you think would help improve golf?
Base: Total Kids (n=308), Child Gender Male (n=163) / Female (n=145)

Find ways to strengthen golfer 'word of mouth'; continue to invest in the youth pathway, with a focus on girls and what appeals to them.

Whilst most members play regularly, many round players play less than five times a year.





QC4b. How many times have you done each of the following in the last year?
Base: Base: Members (n=157), Total Round Players (n=224)

Please refer to Appendix 20 & 21 for breakdown by Gender, Age, Metro/Regional

A clear prize for the golf industry is moving players up the frequency bands, because as their play increases so does their value to the industry.

Yearly Spend – Round Players

	Low Frequency 1-5 Rounds	Mid Frequency 5-20 Rounds	High Frequency 20+ Rounds
Green fees	$66	$220	$523
Equipment	$80	$172	$157
Golf clothes	$31	$70	$79
Practice	$37	$50	$98
Reg. / Comp. Fees	$13	$44	$125

Yearly Spend – Members

	Low Frequency 1-5 Rounds	Mid Frequency 5-20 Rounds	High Frequency 20+ Rounds
Membership/ Green fees	$227	$397	$1016
Registration / Comp. fees	$62	$153	$454
Equipment	$137	$264	$152
Golf clothes	$97	$101	$112
Playing at away courses	$62	$92	$95

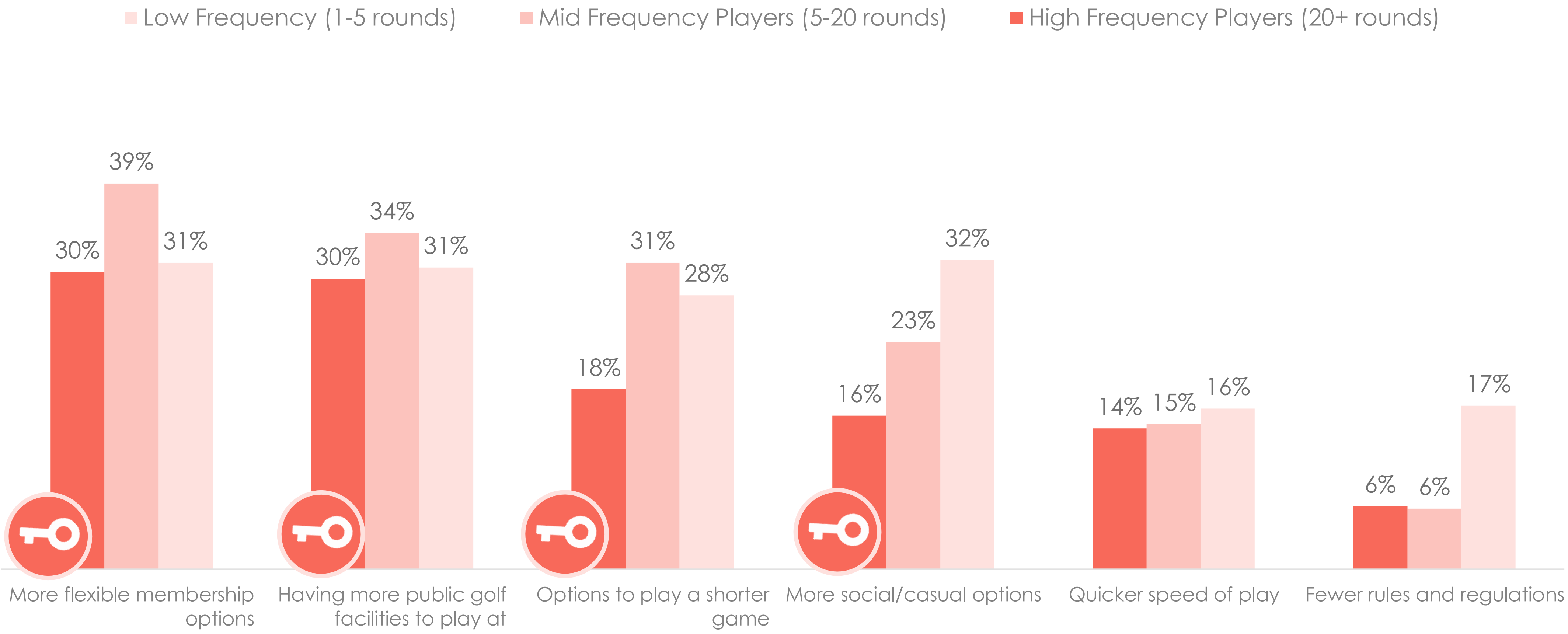
Qrpm3/qmmm3. Approximately how much would you say you spend in a year on the following golf related items?
Base: Members (n=157), Base: Total Round Players (n=224)

Please refer to Appendix 22 & 23 for breakdown by Gender, Age, Metro/Regional

Flexibility (of membership or playing options) is key in driving greater engagement amongst all frequencies of round players.

Drivers to Play More Golf – Round Players

Ranked by Popularity of Drivers



More affordable membership options not shown here, as covered earlier

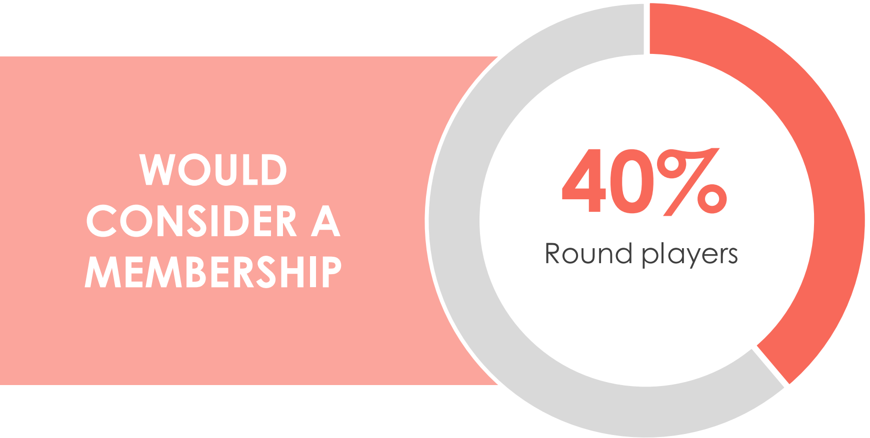
Qrpf1. Which of the following do you think would help you play more golf?

Base: Total Round Players (n=224)

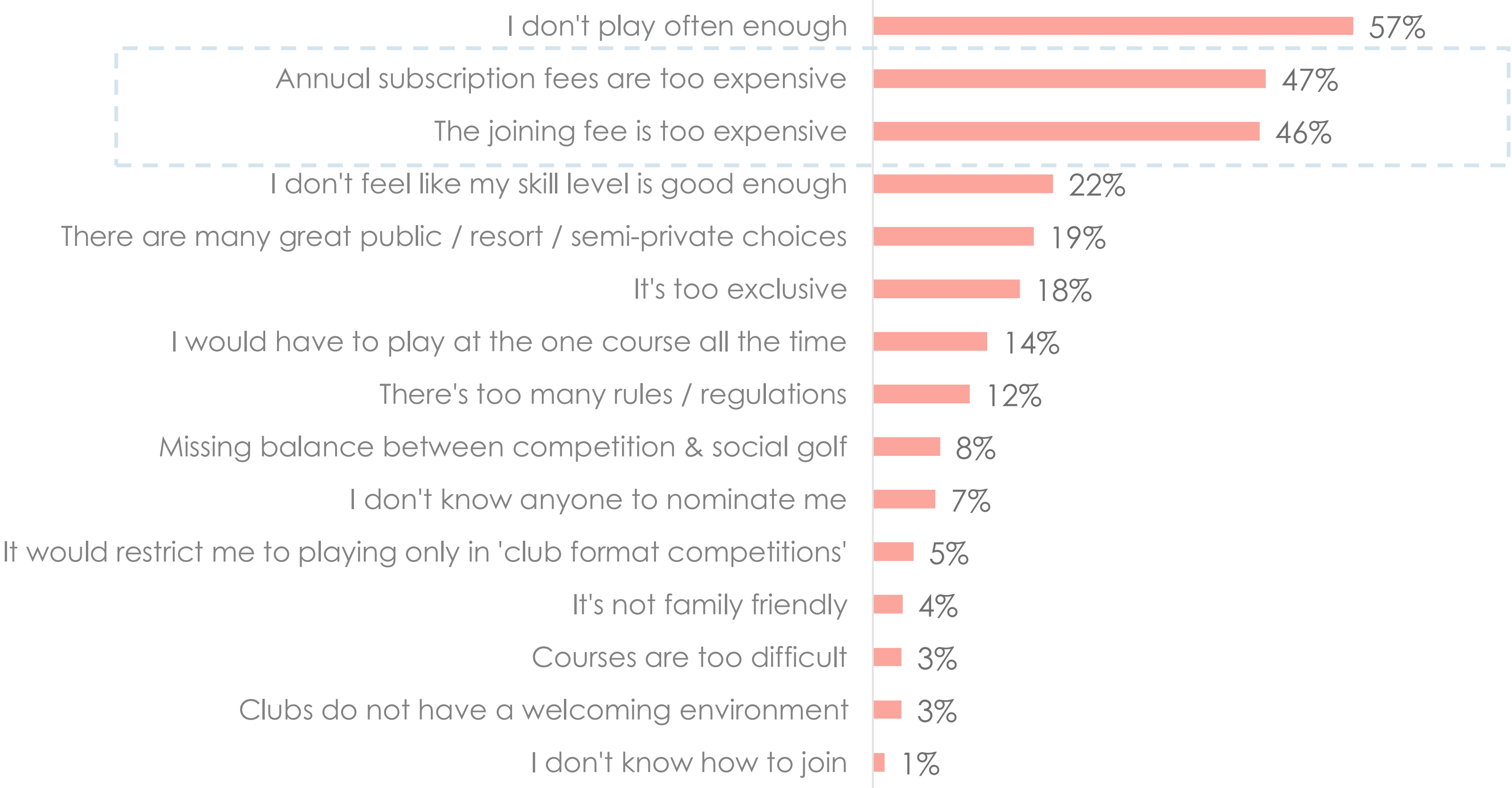
Please refer to Appendix 24 for breakdown by Gender, Age, Metro/Regional

Significant growth potential can be unlocked by driving frequency amongst round players. Provide them with opportunities to play more, from flexible memberships through to more casual and shorter formats.

2 in 5 round players would consider becoming members; subscription fees and high joining fees are cited as key barriers to joining.



Barriers to Membership – Round Players



Qrpb2a - Would you ever consider being a member of a golf club? Qrpb2b. Would you ever consider being a member of a golf club again?
Qrpb3. Why do you not have a membership to a club?
Base: Total Round Players (n=224)

Please refer to Appendix 25 & 26 for breakdown by Gender, Age, Metro/Regional

Trial memberships hold potential to increase membership amongst round players, while group memberships could serve as strong lever to encourage females.

Reasons to Take Membership – Round Players

67%
More affordable subscription
/entry fees

39%
Trial Memberships

18%
More Welcoming Atmosphere

18%
Group Membership Options

9%
More knowledge about joining

Driven by women
11% Male
39%* Female

Qrpf3. Which of the following would encourage you to take up a membership? QA2. Are you…?
Base: Round Players that would consider membership (n=90). Males (n=65) / Females (n=25*)

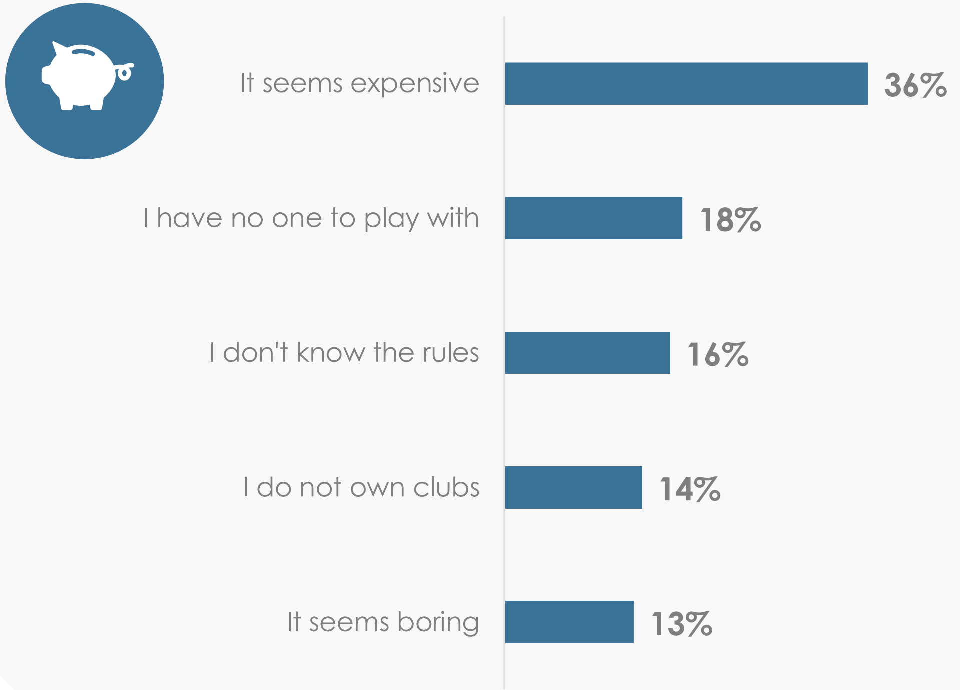
Please refer to Appendix 27 for breakdown by Gender, Age, Metro/Regional

Creating a clear path to membership through group & flexible options has the potential to drive growth.

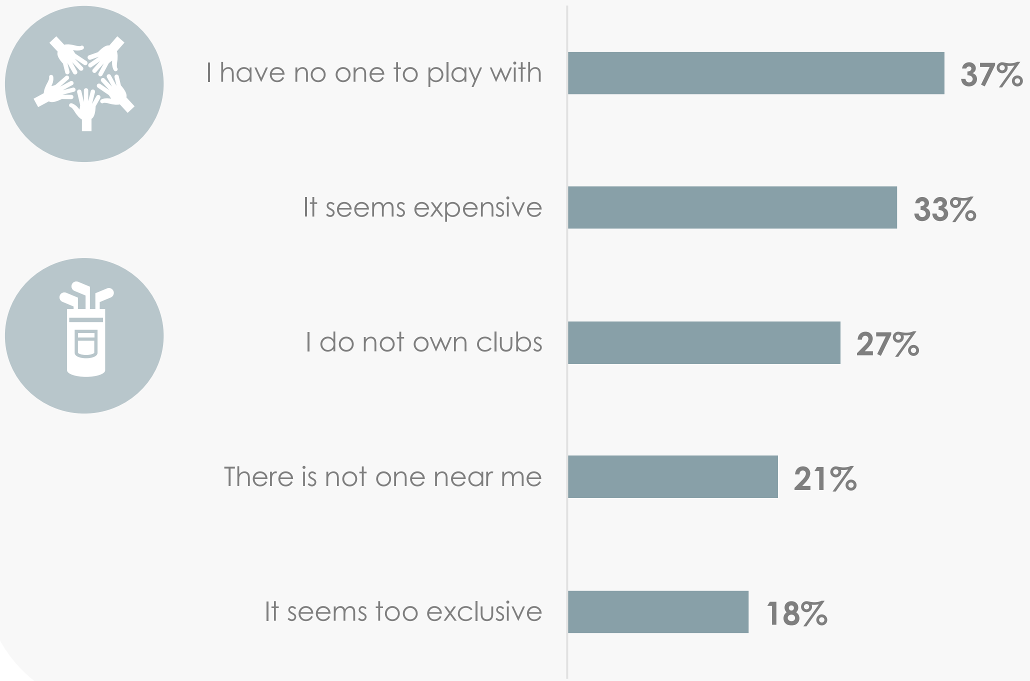
Fear of the perceived cost is a big barrier for those who have not been on a course in the last year.

Barriers to playing on a golf course

Ball Hitters & Alt Players – Top 5



Not played, but would be interested – Top 5



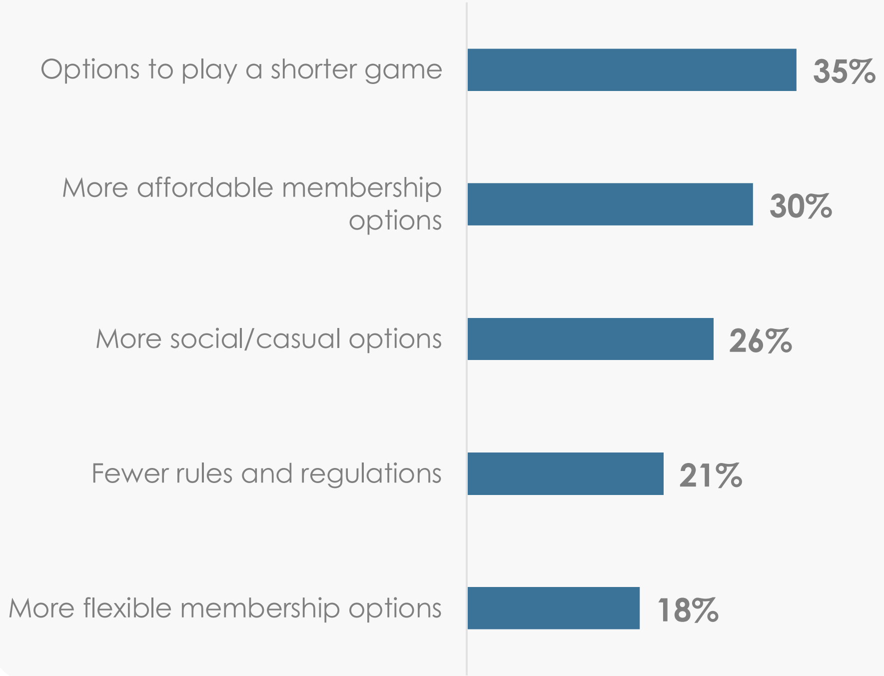
Qapb1. Why have you not played a round of golf in the last year?
Qneb1. Why have you not played a round of golf in the last year?
Base: Ball Hitters & Alt Players who would consider playing a round of golf (n=81) Base: Total not engaged who would consider playing a round of golf (n=138)

Please refer to Appendix 28 & 29 for breakdown by Gender, Age, Metro/Regional

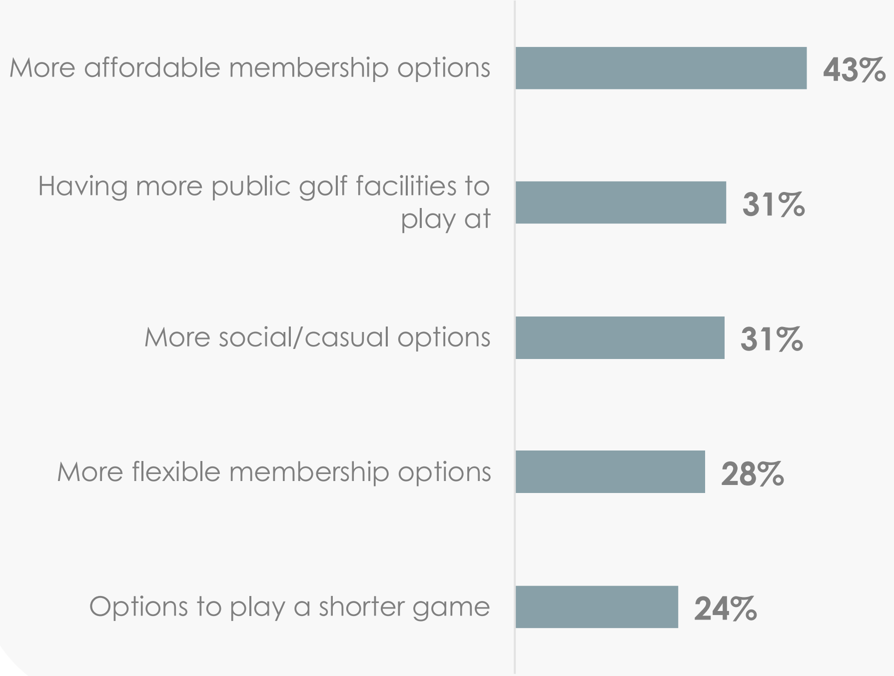
Shorter formats, more casual options and continued investment in public facilities will be key to getting first timers onto the course.

Facilitators to playing on a golf course

Ball Hitters & Alt Players – Top 5



Not played, but would be interested – Top 5



Qapf1. Which of the following would make you more likely to try playing a round of golf?
Qnef1. Which of the following would make you more likely to try playing a round of golf?
Base: Ball Hitters & Alt Players who would consider playing a round of golf (n=81) Base: Total not engaged who would consider playing a round of golf (n=138)

Please refer to Appendix 30 & 31 for breakdown by Gender, Age, Metro/Regional

Giving players the opportunity to get on a golf course through a shorter version of the game has potential to increase engagement.

Public facilities remain key in attracting the masses.

As with round players, frequency and spend variers amongst Ball Hitters.

Average Time Spent Playing

29% play at least once every two weeks

36% play at least monthly or up to four times a year.

35% only play a handful of times per year.

Average Spend by Time Spent

$283 per year

$124 per year

$42 per year

Total Ball Hitter Average Spend

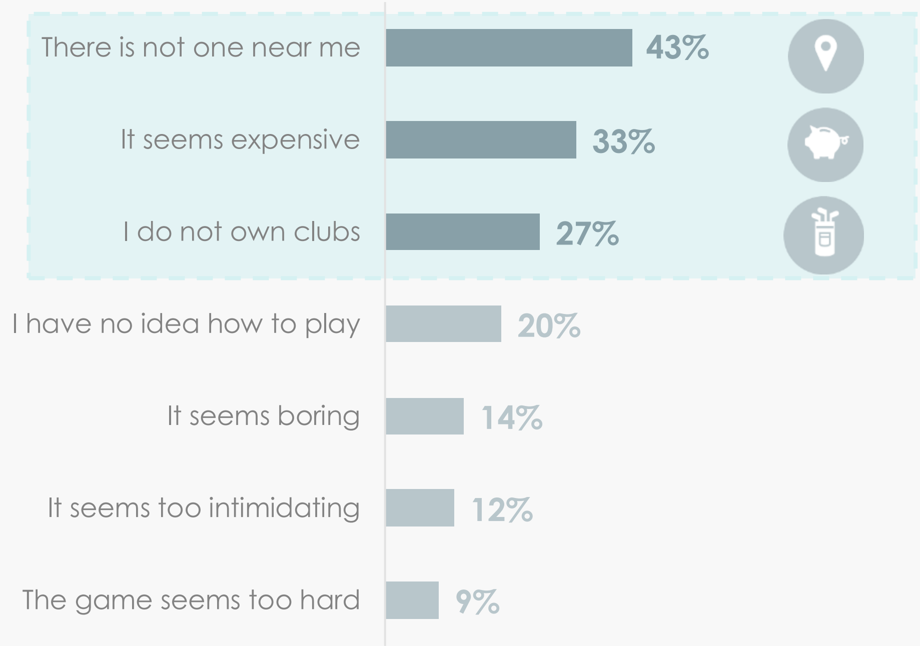
$115

Qbhm1. How often do you go to the driving range? Qbhm2. Approximately how much would you say you spend in a year on going to the driving range?
Base: Total Ball Hitters (n=161)

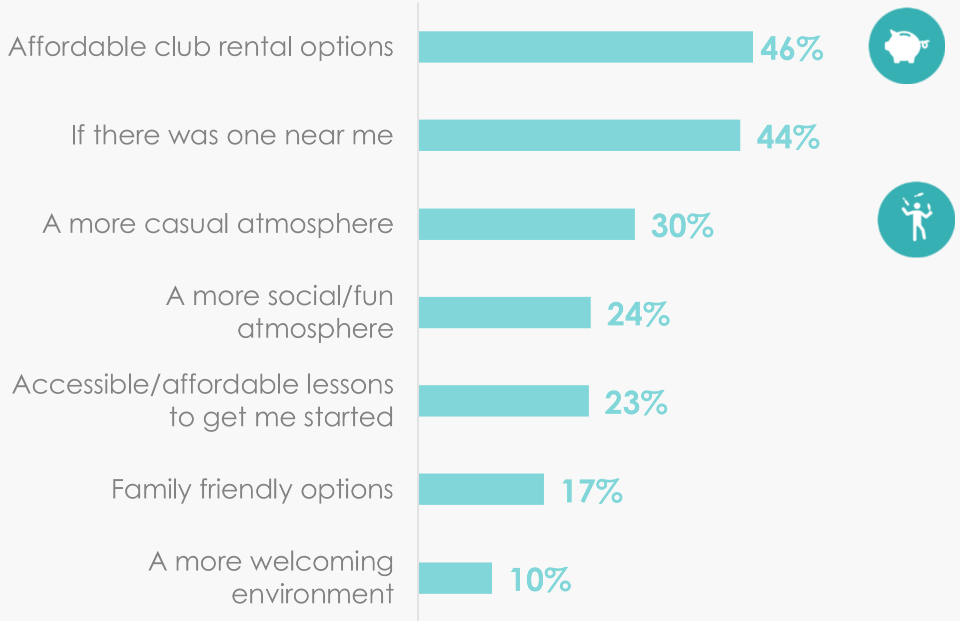
A perceived lack of knowledge/ equipment is a key barrier for potential ball hitters, so showcasing affordable club rental options and lesson accessibility can drive visitation.

Barriers to getting onto a driving range

Reason to Not Participate



Motivators to participate



Qneb1. Why have you not been to the driving range in the last year.. Qnef1. Which of the following would make you more likely to give the driving range a go?
Base: Total not engaged by would consider the driving range (n=137)

Please refer to Appendix 32 & 33 for breakdown by Gender, Age, Metro/Regional

Nature:

Education about driving range lessons and equipment rental can drive people to this important 'gateway' golf activity.

Amongst the Alternative Players we talked to, most players have been to Mini Golf, while penetration of other forms remains niche.

Visitation to Alternative Golf Activities

Qapselect. Activities selected for APM
Base: Total Alt Players (n=232) Mini Golf (n=173) Holey Moley (n=44) Indoor golf simulator (n=23*) Top Golf (n=15*)

Nature:

We have seen lots of new entrants into some of the novel alternative formats, and the newer formats have also seen higher spend.

Average Spend on Alt. Activities
Per Year

$49 **Mini Golf or Putt Putt**
as the family friendly game to pick up the swing of the game.

$71 **Holey Moley**
attracting players for the fun as well as food & drinks.

$93 **Top Golf**
the latest technology visited to give it a go.

Time First Started Alternative Golf Activities

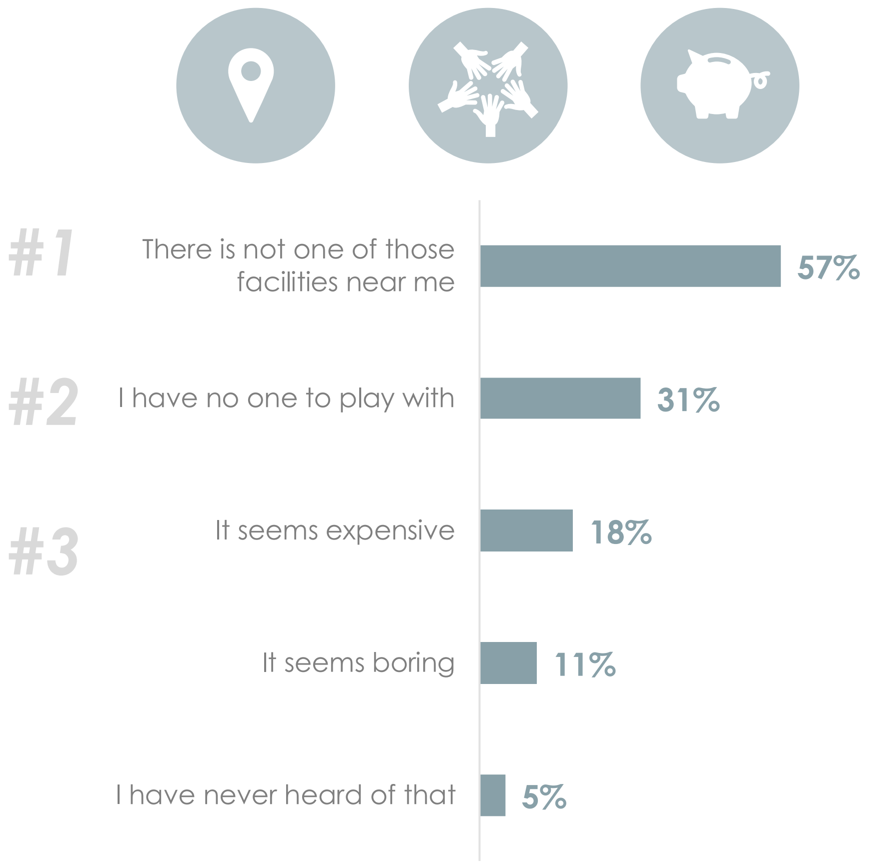
	Less than a year ago	1-2 years ago	3-5 years ago	More than 5 years ago
Mini Golf or Putt Putt	12%	9%	16%	62%
Holey Moley	29%	50%	15%	6%
Top Golf	21%	43%	35%	0%
Indoor Golf Simulator	43%	48%	5%	5%

*small base size – indicative only

Qapm1. When did you first start…? Qapm2. Approximately how much would you say you spend in a year on…?
Base: Total Alt Players (n=232)

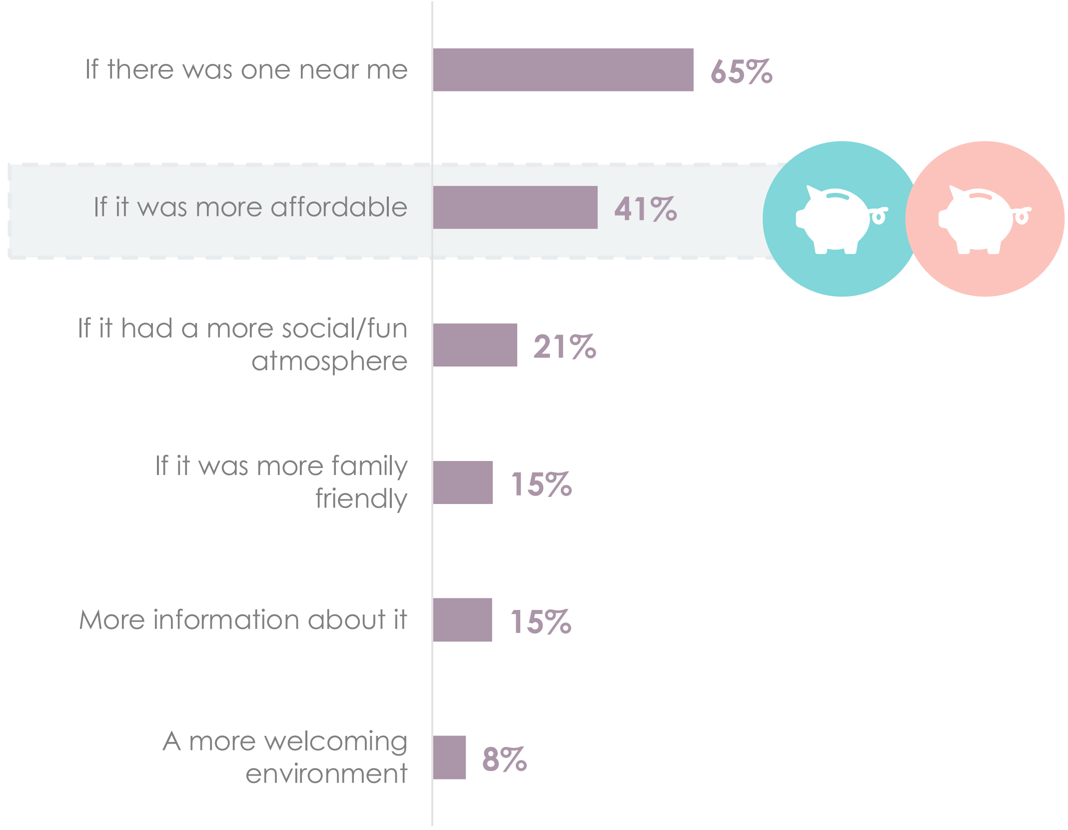
Limited locations serves as the greatest barrier to accessing alternative golfing activities.

Participation Barriers to forms of alternative golf



Facilitators to Alternative Activities

Those who haven't previously tried



Qneb1. Why have you not been to play an alternative form of golf in the last year.. Qnef1. Which of the following would make you more likely to try playing an alternative form of golf?
Base: Total not engaged by would consider alternative golf (n=207)

Please refer to Appendix 34 & 35 for breakdown by Gender, Age, Metro/Regional

Continue to invest in alternative formats that dial up fun and social connection.

Appendix

Definitions in detail

	Members	Round Players	Ball hitters	Alt players	Not engaged yet but would consider	Sports Fans Only	Rejectors
Size 2021	380,000	865,000	295,000	1,645,000	5,800,000	940,000	9,400,000
Definition	Those that currently hold a membership	Have played a round in L12M & do not currently have a membership	Have gone to the driving range in L12M but not played on a golf course in L12M	Have played one of the alternative forms of golf in L12M	Have not done one of the specified golf activities in the L12M but would consider	Watch some form of sport on TV or follow sport digitally or have watch in person, but not partaking in any sport in the last year	Not currently interested in partaking in any form of golf activity in the future
Questionnaire logic	Selected 'yes' @ c7	Selected 'played a round of golf' in L12m @ c3 (9 or 18) and selected 'no' or 'not currently' @ c7	Selected 'driving range' in L12m @ c3	Selected any of the alternative forms at c3	Have not participated in any specific golf activity @ b2.b But would be interested in the future @ b3	Code any at v1a or v1b or v1c and no sport played in the last year at b2b	Did not select any golf activity at b2c
	If selected 'yes' @ c7 prompted with member module and no other modules	If played a round (9 or 18) and not a member prompted with round players module	If they had gone to the driving range and played an alternative form, prompted with module based on least fill Do not ask if they are a member or round player		Prompt with not engaged yet but would consider section		
Sample size	n=157	n=224	n=161	n=232	n=332	n=98	**Did not complete full survey**

Appendix 1 – Fan Engagement with Golf vs Other Sports

Watch on TV

Column %	Gender		Age Group				Metro vs Regional		Total
	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
Tennis	43%	31%	37%	35%	36%	42%	37%	38%	37%
AFL	44% ↑	25% ↓	26%	36%	37%	48%	38%	28%	35%
Cricket	45% ↑	22% ↓	24% ↓	27%	41%	55% ↑	35%	33%	35%
Rugby League	35% ↑	20% ↓	24%	21%	31%	42% ↑	27%	32%	28%
Football (Soccer)	32% ↑	11% ↓	27%	25%	16%	18%	28% ↑	11% ↓	22%
Golf	16% ↑	6% ↓	7%	6%	14%	23% ↑	12%	11%	12%
Horse Racing	20%	10%	12%	15%	14%	26%	17%	13%	16%
Basket-ball	21% ↑	10% ↓	20%	21%	13%	7%	20% ↑	8% ↓	16%
Rugby Union	19%	10%	14%	7% ↓	21%	21%	17%	10%	15%
Cycling	15%	9%	16%	8%	11%	14%	13%	11%	12%
Netball	12%	8%	10%	11%	7%	12%	10%	9%	10%
Bowls	7%	3%	2%	7%	3%	12% ↑	6%	4%	5%
Sailing	5%	6%	3%	4%	6%	10%	5%	6%	5%
Hockey	4%	3%	1%	4%	6%	4%	4%	3%	3%
None of these	12% ↓	37% ↑	23%	32%	25%	13%	24%	23%	24%
Column n	275	225	133	134	135	98	340	160	500

Follow online / on social media (e.g. Facebook, Twitter, Instagram, YouTube, blogs, podcasts)

Column %	Gender		Age Group				Metro vs Regional		Total
	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
Tennis	15%	12%	20%	15%	7%	9%	15%	9%	13%
AFL	19%	12%	13%	19%	16%	18%	18%	11%	16%
Cricket	16%	8%	11%	16%	10%	11%	15%	7%	12%
Rugby League	15%	9%	13%	14%	8%	12%	11%	14%	12%
Football (Soccer)	18% ↑	6% ↓	18%	18%	6%	4%	17% ↑	3% ↓	13%
Golf	6%	5%	8%	5%	2%	6%	5%	6%	6%
Horse Racing	6%	2%	3%	7%	2%	3%	5%	2%	4%
Basket-ball	16% ↑	4% ↓	15%	16%	6%	2% ↓	14% ↑	4% ↓	11%
Rugby Union	6%	3%	4%	4%	5%	5%	6%	1%	4%
Cycling	8%	4%	12% ↑	5%	3%	2%	7%	5%	6%
Netball	6%	3%	9% ↑	5%	1%	0%	6%	1%	5%
Bowls	2%	1%	1%	4% ↑	0%	1%	2%	0%	1%
Sailing	2%	2%	3%	1%	2%	3%	2%	2%	2%
Hockey	2%	2%	3%	3%	0%	0%	3%	0%	2%
None of these	48% ↓	69% ↑	45% ↓	52%	71% ↑	69%	53% ↓	68% ↑	57%
Column n	275	225	133	134	135	98	340	160	500

Go to watch in person

Column %	Gender		Age Group				Metro vs Regional		Total
	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
Tennis	14%	6%	16%	10%	4%	8%	12%	6%	10%
AFL	22%	14%	17%	17%	17%	22%	21%	12%	18%
Cricket	19% ↑	6% ↓	11%	17%	10%	15%	18% ↑	2% ↓	13%
Rugby League	16%	9%	20%	10%	9%	9%	14%	11%	13%
Football (Soccer)	14% ↑	3% ↓	18% ↑	7%	4%	4%	12% ↑	2% ↓	9%
Golf	2%	1%	3%	1%	2%	1%	2%	1%	2%
Horse Racing	10% ↑	3% ↓	6%	5%	4%	12%	7%	5%	7%
Basket-ball	10%	3%	11%	9%	3%	4%	10%	2%	7%
Rugby Union	7%	5%	9%	5%	4%	5%	7%	3%	6%
Cycling	4%	3%	7%	2%	1%	2%	4%	2%	3%
Netball	2%	6%	6%	3%	1%	4%	3%	5%	4%
Bowls	3%	1%	2%	2%	1%	3%	2%	2%	2%
Sailing	1%	1%	2%	2%	1%	0%	0% ↓	3% ↑	1%
Hockey	2%	2%	4%	1%	0%	2%	3% ↑	0% ↓	2%
None of these	41% ↓	66% ↑	37% ↓	56%	64% ↑	60%	48% ↓	63% ↑	53%
Column n	275	225	133	134	135	98	340	160	500

V1. Which of the following sports (if any) do you currently…
Base: Nationally representative sample of Adult Australians n=500

↑↓ significantly above or below average at 95% confidence

Appendix 2 – Triggers Ball Hitters

	Gender		Age Group				Metro vs Regional		Total
Column %	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
I wanted to practice	50% ↑	23% ↓	23%	31%	37%	54%	37%	41%	38%
For the fun and enjoyment	33%	34%	28%	41%	30%	29%	34%	31%	33%
So I could play with my family	29%	25%	48%	21%	26%	31%	26%	30%	27%
So I could play with my friends	20%	28%	48%	38% ↑	9%	14%	28%	11%	24%
I wanted to learn how to play	21%	5%	23%	14%	11%	14%	16%	9%	14%
It was for an event (e.g., work event or birthday)	14%	10%	19%	13%	13%	8%	10%	20%	12%
Saw it on TV and wanted to give it a try	14%	9%	14%	11%	16%	8%	13%	9%	12%
I received a set of golf clubs as a gift	6%	5%	5%	13%	2%	0%	7%	2%	6%
Other [SPECIFY]	3%	5%	0%	2%	5%	5%	4%	3%	4%
Column n	95	66	21*	61	43	36	124	37	161

Qbhm3. What first prompted you to start go to the driving range?
Base: Total Ball Hitters (n=161) / * Caution low base

↑↓ significantly above or below average at 95% confidence

Nature:

Appendix 3 – Triggers Mini Golf

	Gender		Age Group				Metro vs Regional		Total
Column %	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
To socialize	43%	30%	44%	26%	37%	32%	34%	34%	34%
Just for pure enjoyment	54%	67%	69%	58%	69%	57%	65%	57%	63%
To connect with friends	43%	22%	37%	16%	38%	26%	29%	26%	28%
To connect with family	59%	57%	38%	62%	67%	62%	53%	69%	58%
To give golf a try in a more informal way	8%	4%	0%	5%	12%	3%	4%	7%	5%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
Column n	44	129	13*	47	51	62	124	49	173

Triggers Holey Moley

	Gender		Age Group				Metro vs Regional		Total
Column %	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
To socialize	61%	49%	48%	58%	60%	38%	49%	78%	53%
Just for pure enjoyment	81%	41%	43%	73%	44%	56%	57%	44%	55%
To connect with friends	36%	53%	67%	39%	20%	0%	51%	22%	47%
To connect with family	30%	41%	43%	37%	28%	13%	43%	0%	37%
To give golf a try in a more informal way	25%	15%	19%	14%	20%	49%	17%	34%	19%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
Column n	15*	29*	10*	17*	10*	7*	40	4*	44

Qapm3. What first prompted you to start go to…?
Mini Golf (n=173) Holey Moley (n=44) * Caution low base

↑↓ significantly above or below average at 95% confidence

Appendix 4 – Motivations Members

Column %	Gender		Age Group				Metro vs Regional		Total
	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
For fun and enjoyment	76%	64%	54%	51% ↓	65%	84% ↑	72%	77%	74%
For my physical health and wellbeing	73%	51%	50%	38% ↓	51%	83% ↑	70%	66%	69%
To challenge myself	65%	56%	50%	46%	64%	69%	65%	61%	63%
To spend time outdoors	65%	55%	34% ↓	38% ↓	42%	78% ↑	66%	59%	63%
For my mental health and wellbeing	58%	51%	25% ↓	44%	45%	66% ↑	61%	50%	57%
To socialize / meet new people / network	56%	47%	50%	29% ↓	42%	65% ↑	49%	64%	54%
To compete against others	46%	31%	35%	31%	27%	51%	38%	51%	43%
Column n	118	39	20*	32	22*	83	100	57	157

Qmm8. Which of the following describe why you play golf?
Base: Total Members (n=157) * Caution low base

↑↓ significantly above or below average at 95% confidence

Nature:

Appendix 5 – Round Players Motivations

Column %	Gender		Age Group				Metro vs Regional		Total
	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
For fun and enjoyment	74%	60%	67%	64%	65%	79%	73%	64%	71%
For my physical health and wellbeing	48%	54%	20% ↓	21% ↓	60%	58%	50%	50%	50%
To challenge myself	45%	43%	38%	21% ↓	46%	53%	45%	44%	44%
To spend time outdoors	61%	45%	43%	45%	58%	65%	60%	49%	58%
For my mental health and wellbeing	32%	28%	15%	27%	29%	38%	29%	36%	31%
To socialise / meet new people / network	37%	29%	20%	27%	31%	45%	36%	32%	35%
To compete against others	15%	19%	23%	12%	12%	20%	16%	16%	16%
For special occasions (e.g., a trip away with mates or my sports club annual golf day)	13%	10%	17%	13%	8%	14%	12%	13%	12%
Other [SPECIFY]	1%	6%	0%	2%	4%	0%	2%	2%	2%
Column n	168	56	40	41	68	75	169	55	224

Qrpm7. Which of the following describe why you play golf?
Base: Total Round Players (n=224)

↑↓ significantly above or below average at 95% confidence

Nature:

Appendix 5B – Round Players Motivations
Those that have played more than 6 rounds a year

Column %	Gender		Age Group				Metro vs Regional		NET
	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
For fun and enjoyment	76%	76%	75%	74%	70%	82%	82%	55%	76%
For my physical health and wellbeing	63%	60%	36%	0% ↓	73%	72%	59%	71%	62%
To challenge myself	50%	53%	38%	26%	54%	55%	50%	51%	50%
To spend time outdoors	82%	50%	89%	39%	81%	79%	77%	72%	76%
For my mental health and wellbeing	36%	44%	11%	18%	31%	51%	37%	40%	37%
To socialise / meet new people / network	46%	37%	13%	35%	35%	59%	48%	33%	45%
To compete against others	27%	30%	11%	8%	28%	34%	32%	13%	27%
For special occasions (e.g., a trip away with mates or my sports club annual golf day)	8%	0%	13%	10%	4%	7%	9%	0%	7%
Other [SPECIFY]	0%	7%	0%	0%	3%	0%	0%	5%	1%
Column n	58	16*	8*	11*	26*	29*	58	16*	74

Qrpm7. Which of the following describe why you play golf?
Base: Total Round Players that have played more than 6 rounds (n=74)
* Caution low base

↑↓ significantly above or below average at 95% confidence

Appendix 6 – Members Facilitators

Column %	Gender		Age Group				Metro vs Regional		Total
	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
More affordable membership options	64%	54%	35%	31% ↓	47%	77% ↑	57%	70%	62%
More flexible membership options	49%	48%	24%	35%	51%	55%	49%	49%	49%
Quicker speed of play	39%	14%	26%	25%	28%	38%	30%	40%	34%
Having more public golf facilities to play at	34%	30%	26%	35%	41%	31%	36%	28%	33%
Options to play a shorter game	25%	37%	20%	25%	40%	26%	28%	28%	28%
More social/casual options	23%	34%	36%	13%	40%	24%	25%	25%	25%
Better education / coaching programs	24%	26%	35%	22%	28%	23%	21%	29%	24%
Better balance between competition & social golf	23%	19%	15%	29%	32%	19%	20%	27%	23%
Fewer rules and regulations	21%	18%	11%	10%	33%	22%	20%	22%	20%
New scoring formats	13%	15%	20%	10%	22%	12%	14%	13%	14%
Ability to use technology (i.e. Apps) to connect with others	13%	11%	31%	31% ↑	9%	6%	16%	7%	12%
Changes to clothing regulations	6%	14%	16%	13%	17%	4%	9%	7%	8%
Column n	118	39	20*	32	22*	83	100	57	157

Qmf1. Generally speaking,...which of the following do you think would help improve golf?
Base: Total Members (n=157) / * Caution low base

↑↓ significantly above or below average at 95% confidence

Nature:

Appendix 7B – Round Players Facilitators
Those that have played more than 6 rounds a year

Column %	Gender		Age Group				Metro vs Regional		NET
	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
More affordable membership options	45%	26%	38%	28%	46%	42%	39%	52%	42%
More flexible membership options	41%	20%	11%	36%	39%	39%	31%	57%	37%
Having more public golf facilities to play at	33%	34%	49%	56%	34%	24%	38%	19%	33%
Options to play a shorter game	26%	38%	11%	19%	30%	31%	31%	17%	28%
More social/casual options	19%	33%	51%	8%	26%	17%	18%	33%	21%
Quicker speed of play	13%	23%	36%	8%	24%	6%	17%	6%	15%
Fewer rules and regulations	4%	17%	11%	0%	11%	4%	4%	13%	6%
Better education / coaching programs	12%	19%	0%	38%	15%	7%	17%	0%	13%
Changes to clothing regulations	8%	17%	13%	26%	11%	4%	11%	6%	10%
New scoring formats	5%	19%	0%	18%	3%	10%	6%	14%	8%
Ability to use technology (i.e. Apps) to connect with others	4%	7%	13%	10%	7%	0%	6%	0%	5%
Column n	58	16*	8*	11*	26*	29*	58	16*	74

Qrpf1. Which of the following do you think would help you play more golf?
Base: Total Round Players that have played more than 6 rounds (n=74)
* Caution low base

↑↓ significantly above or below average at 95% confidence

Appendix 8 – Ball Hitters Facilitators

Column %	Gender		Age Group				Metro vs Regional		Total
	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
More social/casual options	38%	49%	40%	57%	38%	39%	48%	25%	44%
More affordable membership options	48%	34%	0%	28%	56%	50%	36%	67%	41%
Options to play a shorter game	29%	47%	50%	50%	45%	10%	40%	26%	38%
Having more public golf facilities to play at	41%	10%	12%	13%	31%	39%	27%	20%	26%
More flexible membership options	26%	25%	0%	14%	32%	40%	28%	14%	26%
Quicker speed of play	11%	13%	25%	0%	13%	21%	12%	12%	12%
Better education / coaching programs	5%	19%	0%	15%	7%	21%	11%	15%	12%
Changes to clothing regulations	13%	8%	0%	21%	6%	10%	10%	11%	10%
Ability to use technology (i.e. Apps) to connect with others	14%	4%	12%	21%	0%	10%	11%	0%	9%
A more welcoming environment	12%	3%	25%	0%	0%	20%	6%	14%	7%
Fewer rules and regulations	0%	5%	0%	0%	7%	0%	3%	0%	2%
New scoring formats	0%	0%	0%	0%	0%	0%	0%	0%	0%
Column n	25*	23*	8*	14*	16*	10*	40	8*	48

Qapf1. Which of the following do you think would help you play more golf?
Base: Total Ball Hitter (n=161) * Caution low base

↑↓ significantly above or below average at 95% confidence

Nature:

Appendix 9 – Not engaged facilitators

	Gender		Age Group				Metro vs Regional		Total
Column %	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
More affordable membership options	44%	42%	45%	33%	47%	50%	43%	44%	43%
Having more public golf facilities to play at	36%	22%	31%	27%	32%	36%	29%	36%	31%
More social/casual options	30%	33%	5%	35%	36%	46%	35%	22%	31%
More flexible membership options	31%	22%	35%	22%	28%	28%	29%	27%	28%
Options to play a shorter game	25%	23%	10%	27%	26%	32%	27%	17%	24%
A more welcoming environment	17%	16%	5%	19%	19%	21%	20%	8%	16%
Quicker speed of play	18%	13%	15%	33%	11%	4%	17%	14%	16%
Changes to clothing regulations	11%	13%	10%	22%	13%	0%	15%	5%	12%
Fewer rules and regulations	10%	15%	10%	24%	8%	3%	15%	4%	12%
Better education / coaching programs	11%	5%	15%	14%	8%	0%	10%	7%	9%
Ability to use technology (i.e. Apps) to connect with others	9%	0%	10%	11%	2%	0%	8%	2%	6%
New scoring formats	6%	2%	10%	8%	2%	0%	6%	4%	5%
Column n	90	48	20*	37	53	28*	95	43	138

Qnef1. Which of the following would make you more likely to try playing rounds?
Base: Total not engaged by would consider the playing a round of golf (n=137)

↑↓ significantly above or below average at 95% confidence

Nature:

Appendix 10 – Golf Triggers Members

Column %	Gender		Age Group				Metro vs Regional		Total
	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
My friends / partner introduced me to it	41%	49%	21%	38%	40%	47%	35%	54%	42%
Someone in my family introduced me	23%	31%	47%	16%	41%	21%	24%	26%	25%
My parents introduced me to it	19%	14%	23%	6%	32%	17%	21%	14%	18%
I went to a driving range and liked it	15%	20%	30%	19%	14%	14%	15%	18%	16%
Saw it on TV and wanted to play	15%	8%	20%	38% ↑	9%	7%	16%	10%	14%
I stopped playing / couldn't play another sport any more	12%	17%	0%	9%	8%	17%	15%	11%	13%
I participated in a golf clinic or program	10%	21%	20%	26%	9%	9%	19% ↑	2% ↓	13%
We played at school / school program	9%	11%	24%	19%	14%	5%	12%	6%	10%
Business opportunities	10%	5%	16%	16%	14%	5%	9%	9%	9%
I used an indoor golf simulator and liked it	8%	11%	26%	25% ↑	14%	1% ↓	10%	6%	9%
I retired	7%	9%	0%	3%	4%	10%	6%	8%	7%
Other [SPECIFY]	3%	0%	0%	0%	0%	4%	4%	0%	2%
Column n	118	39	20*	32	22*	83	100	57	157

Qmm5. What first prompted you to start playing golf?
Base: Total Members (n=157) / * Caution low base

↑↓ significantly above or below average at 95% confidence

Appendix 11 – Golf Triggers Round Players

Column %	Gender		Age Group				Metro vs Regional		Total
	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
My friends / partner introduced me to it	54%	58%	33%	50%	56%	60%	57%	47%	55%
My parents introduced me to it	17%	23%	35%	24%	15%	14%	16%	23%	18%
I went to a driving range and liked it	15%	13%	17%	14%	13%	15%	14%	15%	14%
Saw it on TV and wanted to play	14%	11%	10%	17%	18%	9%	15%	9%	14%
We played at school / school program	12%	5%	17%	12%	9%	10%	9%	16%	11%
I participated in a golf clinic or program	5%	9%	10%	10%	0%	8%	7%	2%	6%
I stopped playing / couldn't play another sport any more	4%	5%	7%	3%	3%	5%	5%	1%	4%
Other (Please specify)	3%	6%	0%	2%	5%	5%	4%	4%	4%
I retired	3%	5%	3%	0%	0%	8% ↑	3%	5%	3%
Business opportunities	2%	4%	5%	5%	3%	1%	2%	4%	3%
I used an indoor golf simulator and liked it	1%	7%	0%	7%	4%	0%	3%	0%	3%
Column n	168	56	40	41	68	75	169	55	224

Qrpm4. What first prompted you to start playing golf?
Base: Total Round Players (n=224)

↑↓ significantly above or below average at 95% confidence

Appendix 11B – Golf Triggers Round Players
Those that have played more than 6 rounds a year

Column %	Gender		Age Group				Metro vs Regional		NET
	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
My friends / partner introduced me to it	58%	49%	38%	29%	61%	62%	58%	52%	57%
My parents introduced me to it	16%	30%	62%	28%	15%	13%	17%	22%	18%
I went to a driving range and liked it	15%	12%	25%	8%	20%	10%	15%	13%	14%
Saw it on TV and wanted to play	12%	17%	13%	26%	19%	4%	17%	0%	13%
We played at school / school program	10%	5%	13%	8%	8%	11%	4%	26%	9%
I participated in a golf clinic or program	4%	23%	24%	18%	0%	10%	10%	0%	8%
I stopped playing / couldn't play another sport any more	4%	7%	0%	0%	3%	7%	6%	0%	4%
Other (Please specify)	4%	7%	0%	0%	8%	3%	6%	0%	4%
I retired	0%	15%	0%	0%	0%	6%	4%	0%	3%
Business opportunities	2%	0%	0%	0%	4%	0%	2%	0%	2%
I used an indoor golf simulator and liked it	3%	12%	0%	18%	7%	0%	6%	0%	5%
Column n	58	16*	8*	11*	26*	29*	58	16*	74

Qrpm4. What first prompted you to start playing golf?
Base: Total Round Players that have played more than 6 rounds (n=74)
* Caution low base

↑↓ significantly above or below average at 95% confidence

Nature:

Appendix 12 – Encouraged others to play Members

Column %	Gender		Age Group				Metro vs Regional		Total
	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
Yes	33%	52%	65% ↑	72% ↑	40%	24% ↓	42%	28%	37%
No	67%	48%	35% ↓	28% ↓	60%	76% ↑	58%	72%	63%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
Column n	118	39	20*	32	22*	83	100	57	157

Encouraged others to play Round Players

Column %	Gender		Age Group				Metro vs Regional		Total
	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
Yes	15%	24%	27%	22%	18%	13%	17%	17%	17%
No	85%	76%	73%	78%	82%	87%	83%	83%	83%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
Column n	168	56	40	41	68	75	169	55	224

Qmb1. In the last twelve months have you encouraged/helped someone to take up golf?
Qrpf4. In the last twelve months have you encouraged/helped someone to take up golf?
Base: Total Members (n=157) Base: Total Round Players (n=224)

↑↓ significantly above or below average at 95% confidence

Nature:

Appendix 13 – Age started playing golf Members

Column %	Gender		Age Group				Metro vs Regional		Total
	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
Under 20	44%	35%	74%	38%	49%	38%	44%	39%	42%
20 - 29	26%	11%	26%	38%	24%	19%	21%	26%	23%
30 - 39	12%	20%	0%	25%	18%	11%	15%	10%	13%
40 - 49	11%	22%	0%	0%	10%	18%	11%	15%	13%
50 +	8%	12%	0%	0%	0%	14%	8%	10%	9%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
Column n	118	39	20*	32	22*	83	100	57	157

Qmm2. At what age did you start playing golf? Qmm3. What is your current Golf Australia handicap?
Base: Total Members (n=157) / * Caution low base

↑↓ significantly above or below average at 95% confidence

Appendix 14 – Future interest in activities

Column %	Child Gender		Metro vs Regional		Total
	Male	Female	Metro	Regional	NET
NET	89%	91%	91%	87%	90%
Swimming	72%	78%	75%	74%	75%
Playing an alternative form of golf (e.g., Mini Golf, Foot Golf, Pitch & Putt, Indoor Simulator)	68%	69%	66%	74%	68%
Cycling	49%	50%	50%	48%	49%
Tennis	48%	47%	50%	42%	47%
Basketball	50%	39%	48%	39%	45%
Football (Soccer)	48% ↑	25% ↓	39%	32%	37%
Cricket	37%	28%	37%	22%	33%
Played a round of golf	41% ↑	20% ↓	32%	30%	31%
Gone to a driving range	39%	22%	32%	28%	31%
Netball	20% ↓	40% ↑	33%	21%	30%
AFL	32%	17%	29%	15%	25%
Lawn Bowls	19%	22%	23%	14%	20%
Column n	163	145	223	85	308

Qk4. Which of the following would you be interested in participating in the future?
Base: Total Kids (n=308)

↑↓ significantly above or below average at 95% confidence

Appendix 15 – Equipment Currently Owned

Column %	Child Gender		Metro vs Regional		Total
	Male	Female	Metro	Regional	NET
NET	100%	100%	100%	100%	100%
Swimming goggles	56%	71%	65%	58%	63%
A bicycle	61%	65%	62%	66%	63%
A soccer ball	50%	37%	46%	40%	44%
A basketball	38%	46%	44%	36%	42%
Tennis racquet	32%	48%	44%	29%	40%
A football	44%	30%	42%	27%	37%
Cricket bat	36%	22%	31%	25%	29%
A netball	7%	20%	16%	6%	13%
A rugby ball	10%	16%	13%	12%	13%
None of these	8%	11%	8%	13%	10%
Golf clubs	11%	4%	8%	6%	8%
Column n	163	145	223	85	308

Qk5. Which of the following do you currently own?
Base: Total Kids (n=308)

↑↓ significantly above or below average at 95% confidence

Appendix 18 – My Golf Awareness

Column %	Child Gender		Metro vs Regional		Total
	Male	Female	Metro	Regional	NET
Yes	12%	16%	13%	15%	14%
Column n	163	145	223	85	308

Qk9. Are you aware of the MyGolf program?
Base: Total Kids (n=308)

↑↓ significantly above or below average at 95% confidence

Appendix 19 – Drivers to Play More Golf – Youth

	Child Gender		Metro vs Regional		Total
Column %	Male	Female	Metro	Regional	NET
NET	99%	99%	99%	98%	99%
More affordable membership options	41%	42%	37%	50%	41%
Options to play a shorter game	37%	41%	42%	34%	39%
Quicker speed of play	38%	36%	39%	33%	37%
More social/casual options	26%	32%	31%	23%	29%
More flexible membership options	26%	17%	24%	16%	22%
Better education / coaching programs	20%	21%	25%	10%	20%
Fewer rules and regulations	21%	15%	20%	14%	18%
Ability to use technology (i.e. Apps) to connect with others	17%	12%	15%	13%	15%
Changes to clothing regulations	14%	15%	17%	9%	14%
New scoring formats	8%	8%	9%	6%	8%
Column n	163	145	223	85	308

Qk11. Which of the following do you think would help improve golf?
Base: Total Kids (n=308))

↑↓ significantly above or below average at 95% confidence

Nature:

Appendix 20 – Number of rounds played – Members

Column %	Gender		Age Group				Metro vs Regional		Total
	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
1-5	12% ↓	32% ↑	34%	27%	35% ↑	7% ↓	15%	19%	16%
6-20	28%	32%	50%	54% ↑	33%	19% ↓	31%	25%	29%
20+	60% ↑	36% ↓	16% ↓	19% ↓	31% ↓	74% ↑	54%	56%	55%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
Trimmed Average	42	29	12	11	15	57	38	40	39
Column n	118	39	20*	32	22*	83	100	57	157

QC4b. How many times have you done each of the following in the last year?
Base: Members (n=157) / * Caution low base

↑↓ significantly above or below average at 95% confidence

Appendix 21 – Number of rounds played – Round Players

	Gender		Age Group				Metro vs Regional		Total
Column %	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
1-5	63%	69%	79%	73%	61%	60%	63%	68%	64%
6-20	27%	25%	16%	19%	37%	23%	28%	24%	27%
20+	10%	6%	5%	7%	2%	16% ↑	9%	9%	9%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
Trimmed Average	6	5	4	5	5	9	6	5	6
Column n	165	56	39	41	68	73	166	55	221

QC4b. How many times have you done each of the following in the last year?
Base: Total Round Players (n=224)

↑↓ significantly above or below average at 95% confidence

Nature:

Appendix 22 – Golf Spend Members

Trimmed Average	Gender		Age Group				Metro vs Regional		Total
	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
Membership/green fees	$730	$498	$230	$233	$788	$851	$754	$581	$680
Registrations/competition fees	$320	$191	$70	$78	$165	$419	$239	$399	$291
Equipment	$154	$283	$106	$287	$214	$146	$201	$130	$171
Golf Clothes	$101	$138	$90	$129	$127	$101	$125	$77	$106
Practice (e.g., Cost of balls at the driving range when you practice)	$44	$72	$72	$129	$81	$28	$60	$32	$49
Playing courses other than your home course	$86	$105	$58	$79	$91	$98	$89	$93	$90
Golf lessons/tuition	$17	$37	$64	$60	$22	$8	$32	$3	$20
Golf specific holidays/travel	$70	$50	$44	$274	$76	$32	$108	$34	$64
SUM	$1,701	$1,772	$1,039	$1,415	$1,881	$1,831	$1,814	$1,591	$1,700
Column n	118	39	20*	32	22*	83	100	57	157

Qmmm3. Approximately how much would you say you spend in a year on the following golf related items?
Base: Members (n=157) / * Caution low base

↑↓ significantly above or below average at 95% confidence

Appendix 23 – Golf Spend Round Players

	Gender		Age Group				Metro vs Regional		Total
Trimmed Average	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
SUM	$482	$423	$518	$645	$364	$525	$515	$340	$470
Green fees	$132	$86	$60	$83	$108	$175	$130	$101	$122
Equipment	$117	$98	$127	$171	$112	$98	$137	$61	$113
Golf Clothes	$40	$66	$59	$55	$45	$43	$52	$27	$45
Practice (e.g., Cost of balls at the driving range when you practice)	$43	$48	$69	$99	$36	$32	$49	$32	$44
Registrations/competition fees	$25	$35	$42	$41	$14	$37	$29	$22	$27
Golf lessons/tuition	$5	$17	$44	$59	$1	$1	$12	$0	$8
Golf specific holidays/travel	$2	$15	$45	$24	$0	$0	$8	$1	$5
Column n	168	56	40	41	68	75	169	55	224

Qrpm3. Approximately how much would you say you spend in a year on the following golf related items?
Base: Total Round Players (n=224)

↑↓ significantly above or below average at 95% confidence

Nature:

Appendix 23B – Golf Spend Round Players
Those that have played more than 6 rounds a year

Trimmed Average	Gender		Age Group				Metro vs Regional		NET
	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	
SUM	$861	$492	$830	$1,804	$619	$919	$825	$684	$792
Green fees	$301	$146	$124	$138	$202	$411	$282	$248	$267
Equipment	$183	$67	$157	$231	$192	$132	$191	$99	$161
Golf Clothes	$68	$91	$74	$153	$68	$69	$80	$47	$72
Practice (e.g., Cost of balls at the driving range when you practice)	$58	$50	$104	$195	$39	$52	$58	$57	$56
Registrations/competition fees	$62	$78	$117	$101	$31	$107	$60	$70	$59
Golf lessons/tuition	$16	$16	$128	$327	$19	$2	$18	$7	$15
Golf specific holidays/travel	$9	$2	$106	$592	$0	$0	$7	$4	$6
Column n	58	16*	8*	11*	26*	29*	58	16*	74

Qrpm3. Approximately how much would you say you spend in a year on the following golf related items?
Base: Total Round Players that have played more than 6 rounds (n=74)
* Caution low base

↑↓ significantly above or below average at 95% confidence

Nature:

Appendix 24 – Facilitators Round Players

	Gender		Age Group				Metro vs Regional		Total
Column %	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
More affordable membership options	47%	40%	38%	44%	48%	45%	42%	55%	45%
More flexible membership options	35%	26%	27%	24%	34%	37%	33%	32%	33%
Having more public golf facilities to play at	33%	24%	40%	36%	31%	27%	34%	23%	31%
Options to play a shorter game	27%	34%	33%	20%	32%	28%	30%	23%	28%
More social/casual options	25%	38%	38%	22%	29%	28%	25%	36%	28%
Quicker speed of play	15%	17%	20%	15%	19%	12%	18%	9%	16%
Fewer rules and regulations	11%	19%	22%	17%	19%	4%	11%	19%	13%
Better education / coaching programs	8%	12%	7%	22%	9%	5%	12%	2%	9%
Changes to clothing regulations	7%	14%	13%	12%	10%	5%	9%	9%	9%
New scoring formats	5%	11%	5%	14%	4%	5%	6%	8%	6%
Ability to use technology (i.e. Apps) to connect with others	5%	4%	18% ↑	7%	3%	1%	5%	2%	4%
Column n	168	56	40	41	68	75	169	55	224

↑↓ significantly above or below average at 95% confidence

Nature:

Qrpf1. Which of the following do you think would help you play more golf? Base: Total Round Players (n=224)

Appendix 24B – Facilitators Round Players
Those that have played more than 6 rounds a year

Column %	Gender		Age Group				Metro vs Regional		NET
	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
More affordable membership options	45%	26%	38%	28%	46%	42%	39%	52%	42%
More flexible membership options	41%	20%	11%	36%	39%	39%	31%	57%	37%
Having more public golf facilities to play at	33%	34%	49%	56%	34%	24%	38%	19%	33%
Options to play a shorter game	26%	38%	11%	19%	30%	31%	31%	17%	28%
More social/casual options	19%	33%	51%	8%	26%	17%	18%	33%	21%
Quicker speed of play	13%	23%	36%	8%	24%	6%	17%	6%	15%
Fewer rules and regulations	4%	17%	11%	0%	11%	4%	4%	13%	6%
Better education / coaching programs	12%	19%	0%	38%	15%	7%	17%	0%	13%
Changes to clothing regulations	8%	17%	13%	26%	11%	4%	11%	6%	10%
New scoring formats	5%	19%	0%	18%	3%	10%	6%	14%	8%
Ability to use technology (i.e. Apps) to connect with others	4%	7%	13%	10%	7%	0%	6%	0%	5%
Column n	58	16*	8*	11*	26*	29*	58	16*	74

Qrpf1. Which of the following do you think would help you play more golf?
Base: Total Round Players that have played more than 6 rounds (n=74)
* Caution low base

↑↓ significantly above or below average at 95% confidence

Nature:

Appendix 25 – Membership Consideration – Round Players

Column %	Gender: Male	Gender: Female	Age Group: 18 to 29	Age Group: 30 to 44	Age Group: 45 to 59	Age Group: 60+	Metro vs Regional: Metro	Metro vs Regional: Regional	Total: NET
Yes	33%	39%	44%	33%	42%	24%	37%	26%	35%
No	67%	61%	56%	67%	58%	76%	63%	74%	65%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
Column n	124	45	36	35	53	45	133	36	169

Membership Consideration – Round Players (Who were members in the past)

Column %	Gender: Male	Gender: Female	Age Group: 18 to 29	Age Group: 30 to 44	Age Group: 45 to 59	Age Group: 60+	Metro vs Regional: Metro	Metro vs Regional: Regional	Total: NET
Yes	52%	51%	50%	82%	67%	40%	46%	62%	52%
No	48%	49%	50%	18%	33%	60%	54%	38%	48%
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
Column n	44	11*	4*	6*	15*	30	36	19*	55

Qrpb2a - Would you ever consider being a member of a golf club? Qrpb2b. Would you ever consider being a member of a golf club again?
Base: Total Round Players (n=224) / * Caution low base

↑↓ significantly above or below average at 95% confidence

Appendix 26 – Barriers to Membership – Round Players

Column %	Gender		Age Group				Metro vs Regional		Total
	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
I don't play often enough	60%	46%	49%	40%	60%	63%	55%	64%	57%
Annual subscription fees are too expensive	50%	36%	35%	41%	46%	52%	46%	49%	47%
The joining fee is too expensive	49%	34%	22%	37%	43%	58%	44%	51%	46%
I don't feel like my skill level is good enough	22%	20%	12%	13%	20%	28%	20%	26%	22%
There are many great public / resort / semi-private choices	20%	16%	18%	7%	19%	24%	20%	17%	19%
It's too exclusive	15%	29%	12%	17%	22%	15%	18%	15%	18%
I would have to play at the one course all the time	15%	10%	17%	13%	11%	16%	14%	12%	14%
There's too many rules / regulations	10%	16%	7%	7%	19%	8%	10%	17%	12%
Doesn't have the right balance between competition & social golf	6%	15%	10%	17%	7%	5%	8%	8%	8%
I don't know anyone to nominate me	9%	1%	7%	5%	8%	8%	5%	14%	7%
Other [SPECIFY]	5%	7%	2%	2%	6%	8%	6%	4%	6%
It would restrict me to playing only in 'club format competitions'	4%	10%	8%	7%	3%	5%	6%	1%	5%
It's not family friendly	4%	2%	3%	8%	2%	4%	2%	9%	4%
Courses are too difficult	3%	7%	3%	14% ↑	1%	1%	4%	2%	3%
Clubs do not have a welcoming environment	2%	8%	3%	5%	4%	3%	2%	7%	3%
I don't know how to join	1%	1%	5%	3%	2%	0%	1%	2%	1%
Column n	168	56	40	41	68	75	169	55	224

Qrpb3. Why do you not have a membership to a club?
Base: Total Round Players (n=224)

↑↓ significantly above or below average at 95% confidence

Appendix 26 – Barriers to Membership – Round Players
Those that have played more than 6 rounds a year

Column %	Gender		Age Group				Metro vs Regional		NET
	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
I don't play often enough	46%	39%	36%	19%	50%	48%	43%	50%	45%
Annual subscription fees are too expensive	55%	61%	49%	44%	57%	59%	57%	52%	56%
The joining fee is too expensive	44%	30%	11%	38%	35%	52%	40%	46%	42%
I don't feel like my skill level is good enough	14%	39%	11%	19%	15%	23%	19%	19%	19%
There are many great public / resort / semi-private choices	24%	35%	25%	10%	30%	27%	28%	20%	26%
It's too exclusive	10%	34%	13%	18%	15%	13%	15%	11%	14%
I would have to play at the one course all the time	18%	16%	36%	28%	16%	14%	19%	13%	17%
There's too many rules / regulations	13%	29%	11%	18%	26%	7%	13%	26%	16%
Doesn't have the right balance between competition & social golf	3%	7%	0%	19%	3%	0%	5%	0%	4%
I don't know anyone to nominate me	2%	0%	0%	0%	4%	0%	0%	6%	2%
Other [SPECIFY]	4%	15%	0%	0%	4%	10%	8%	0%	6%
It would restrict me to playing only in 'club format competitions'	9%	7%	25%	10%	3%	11%	11%	0%	9%
It's not family friendly	5%	0%	0%	10%	4%	4%	1%	13%	4%
Courses are too difficult	0%	5%	0%	8%	0%	0%	1%	0%	1%
Clubs do not have a welcoming environment	4%	5%	0%	8%	4%	4%	1%	13%	4%
I don't know how to join	2%	0%	0%	0%	4%	0%	0%	6%	2%
Column n	58	16*	8*	11*	26*	29*	58	16*	74

Qrpb3. Why do you not have a membership to a club?
Base: Total Round Players (n=224)
Base: Total Round Players that have played more than 6 rounds (n=74)
* Caution low base

↑↓ significantly above or below average at 95% confidence

Appendix 27 – Facilitators to take up membership

	Gender		Age Group				Metro vs Regional		Total
Column %	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
More affordable membership - subscription/entry fees	72%	50%	60%	41%	72%	75%	62%	81%	67%
Trial memberships	38%	41%	67%	24%	40%	34%	41%	32%	39%
A more welcoming atmosphere	16%	27%	17%	30%	15%	17%	20%	14%	18%
Group membership options	11%	39%	27%	28%	18%	9%	20%	10%	18%
More knowledge about the joining process	8%	12%	12%	23%	10%	0%	8%	10%	9%
Other [SPECIFY]	6%	4%	6%	6%	3%	9%	6%	3%	6%
Column n	65	25*	18*	17*	32	23*	69	21*	90

Qrpf3. Which of the following would encourage you to take up a membership?
Base: Round Players that would consider membership (n=90) / * Caution low base

↑↓ significantly above or below average at 95% confidence

Appendix 28 – Barriers to getting on course – Ball Hitters/Round Players

Column %	Gender		Age Group				Metro vs Regional		Total
	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
It seems expensive	30%	40%	82% ↑	20%	26%	60%	37%	33%	36%
I have no one to play with	13%	20%	5%	4% ↓	31%	40%	18%	18%	18%
I don't know the rules	3% ↓	24% ↑	45%	19%	2% ↓	12%	11%	27%	16%
I do not own clubs	13%	14%	8%	3% ↓	23%	29%	15%	11%	14%
It seems boring	3%	18%	0%	17%	14%	11%	19%	0%	13%
There is not one near me	17%	6%	3%	16%	0%	25%	9%	12%	10%
I have no idea how to play	18%	3%	8%	12%	7%	0%	3%	19%	8%
It seems too exclusive	5%	9%	5%	9%	4%	12%	10%	2%	7%
The game seems too hard	3%	6%	8%	8%	2%	0%	7%	0%	5%
It seems too intimidating	1%	3%	5%	0%	4%	0%	3%	0%	2%
Other [SPECIFY]	36%	9%	0%	22%	18%	34%	16%	26%	19%
Column n	33	48	10*	25*	29*	17*	63	18*	81

Qapb1. Why have you not played a round of golf in the last year?
Base: Ball Hitters & Alt Players who would consider playing a round of golf (n=81) / * Caution low base

↑↓ significantly above or below average at 95% confidence

Appendix 29 – Barriers to getting on course – Not engaged but would consider

	Gender		Age Group				Metro vs Regional		Total
Column %	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
I have no one to play with	43%	25%	25%	33%	38%	54%	36%	41%	37%
It seems expensive	27%	45%	30%	32%	39%	28%	30%	40%	33%
I do not own clubs	29%	23%	10%	35%	29%	32%	25%	31%	27%
There is not one near me	22%	18%	20%	19%	23%	21%	26%	9%	21%
It seems too exclusive	18%	17%	15%	24%	23%	7%	18%	18%	18%
The game seems too hard	11%	9%	25%	16%	2%	0%	14%	4%	11%
I have no idea how to play	8%	15%	15%	19%	4%	3%	10%	10%	10%
It seems boring	8%	12%	10%	16%	9%	0%	9%	9%	9%
I don't know the rules	7%	8%	10%	14%	6%	0%	10%	2%	8%
It seems too intimidating	9%	4%	10%	16%	2%	0%	11%	0%	7%
Other [SPECIFY]	16%	15%	0%	13%	11%	40% ↑	17%	14%	16%
Column n	90	48	20*	37	53	28*	95	43	138

Qb1. Why have you not played a round of golf in the last year?
Base: Total not engaged who would consider playing a round of golf (n=138) / * Caution low base

↑↓ significantly above or below average at 95% confidence

Nature:

Appendix 30 – Facilitators to get on course – Ball Hitters/Alternative Players

Column %	Gender		Age Group				Metro vs Regional		Total
	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
Options to play a shorter game	37%	33%	10%	39%	46%	20%	39%	24%	35%
More affordable membership options	30%	30%	0%	34%	28%	57%	34%	21%	30%
More social/casual options	25%	26%	8%	18%	37%	42%	34%	9%	26%
Fewer rules and regulations	6%	29%	79% ↑	6%	13%	17%	22%	18%	21%
More flexible membership options	28%	13%	0%	19%	17%	40%	16%	23%	18%
Having more public golf facilities to play at	23%	11%	2%	3% ↓	30%	34%	18%	10%	16%
Quicker speed of play	23%	10%	5%	0%	37% ↑	12%	14%	16%	15%
Better education / coaching programs	8%	9%	0%	9%	9%	18%	8%	11%	9%
A more welcoming environment	11%	6%	5%	0%	7%	40% ↑	6%	11%	8%
Changes to clothing regulations	11%	3%	0%	4%	9%	11%	8%	2%	6%
Ability to use technology (i.e. Apps) to connect with others	6%	5%	2%	11%	0%	6%	8%	0%	5%
New scoring formats	0%	0%	0%	0%	0%	0%	0%	0%	0%
Column n	33	48	10*	25*	29*	17*	63	18*	81

Qapf1. Which of the following would make you more likely to try playing a round of golf?
Base: Ball Hitters & Alt Players who would consider playing a round of golf (n=81) / * Caution low base

↑↓ significantly above or below average at 95% confidence

Nature:

Appendix 31 – Facilitators to get on course – Not engaged yet

Column %	Gender		Age Group				Metro vs Regional		Total
	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
More affordable membership options	44%	42%	45%	33%	47%	50%	43%	44%	43%
Having more public golf facilities to play at	36%	22%	31%	27%	32%	36%	29%	36%	31%
More social/casual options	30%	33%	5%	35%	36%	46%	35%	22%	31%
More flexible membership options	31%	22%	35%	22%	28%	28%	29%	27%	28%
Options to play a shorter game	25%	23%	10%	27%	26%	32%	27%	17%	24%
A more welcoming environment	17%	16%	5%	19%	19%	21%	20%	8%	16%
Quicker speed of play	18%	13%	15%	33%	11%	4%	17%	14%	16%
Changes to clothing regulations	11%	13%	10%	22%	13%	0%	15%	5%	12%
Fewer rules and regulations	10%	15%	10%	24%	8%	3%	15%	4%	12%
Better education / coaching programs	11%	5%	15%	14%	8%	0%	10%	7%	9%
Ability to use technology (i.e. Apps) to connect with others	9%	0%	10%	11%	2%	0%	8%	2%	6%
New scoring formats	6%	2%	10%	8%	2%	0%	6%	4%	5%
Column n	90	48	20*	37	53	28*	95	43	138

Qnef1. Which of the following would make you more likely to try playing a round of golf?
Base: Total not engaged who would consider playing a round of golf (n=138)

↑↓ significantly above or below average at 95% confidence

Nature:

Appendix 32 – Barriers to getting on a driving range – Not engaged yet

	Gender		Age Group				Metro vs Regional		Total
Column %	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
There is not one near me	40%	48%	25%	46%	44%	65%	45%	35%	43%
It seems expensive	29%	42%	37%	34%	37%	20%	36%	24%	33%
I do not own clubs	27%	26%	29%	32%	21%	20%	25%	32%	27%
I have no idea how to play	22%	16%	29%	32%	6%	0%	23%	10%	20%
It seems boring	15%	11%	13%	26%	6%	0%	17%	3%	14%
It seems too intimidating	15%	5%	17%	17%	7%	0%	15%	2%	12%
The game seems too hard	8%	11%	8%	15%	9%	0%	12%	2%	9%
Other [SPECIFY]	13%	18%	8%	4%	19%	40% ↑	12%	21%	14%
Column n	85	52	24*	47	46	20*	103	34	137

Qneb1. Why have you not been to the driving range in the last year..
Base: Total not engaged by would consider the driving range (n=137) / * Caution low base

↑↓ significantly above or below average at 95% confidence

Appendix 33 – Facilitators to getting on a driving range – Not engaged yet

	Gender		Age Group				Metro vs Regional		Total
Column %	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
Affordable club rental options	49%	40%	58%	49%	37%	31%	52%	27%	46%
If there was one near me	42%	48%	25%	44%	48%	70%	44%	43%	44%
A more casual atmosphere	36%	18%	42%	30%	17%	25%	36%	8%	30%
A more social/fun atmosphere	23%	25%	21%	32%	24%	10%	28%	8%	24%
Accessible/affordable lessons to get me started	21%	28%	20%	30%	33%	0%	24%	22%	23%
Family friendly options	15%	22%	17%	23%	17%	5%	21%	5%	17%
Options to play a shorter version	7% ↓	32% ↑	12%	23%	13%	9%	16%	13%	15%
A more welcoming environment	11%	9%	8%	17%	9%	0%	10%	9%	10%
Column n	85	52	24*	47	46	20*	103	34	137

Qnef1. Which of the following would make you more likely to give the driving range a go?
Base: Total not engaged by would consider the driving range (n=137) / * Caution low base

↑↓ significantly above or below average at 95% confidence

Appendix 34 – Barriers to playing an alternative form of golf – Not engaged yet

	Gender		Age Group				Metro vs Regional		Total
Column %	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
There is not one of those facilities near me	50%	63%	46%	59%	52%	74%	55%	62%	57%
I have no one to play with	39%	24%	44%	33%	23%	20%	34%	25%	31%
Other [SPECIFY]	24%	17%	22%	11%	29%	20%	20%	20%	20%
It seems expensive	16%	19%	19%	27%	14%	6%	20%	13%	18%
It seems boring	12%	10%	13%	13%	10%	6%	16% ↑	1% ↓	11%
I have never heard of that	8%	2%	13%	2%	2%	3%	5%	4%	5%
Column n	82	125	32	61	78	36	133	74	207

Qneb1. Why have you not been to play an alternative form of golf in the last year..
Base: Total not engaged by would consider alternative golf (n=207)

↑↓ significantly above or below average at 95% confidence

Appendix 35 – Facilitators to playing an alternative form of golf – Not engaged yet

	Gender		Age Group				Metro vs Regional		Total
Column %	Male	Female	18 to 29	30 to 44	45 to 59	60+	Metro	Regional	NET
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%
If there was one near me	63%	68%	49%	66%	63%	89%	61%	75%	65%
If it was more affordable	39%	43%	44%	49%	45%	22%	45%	36%	41%
If it had a more social/fun atmosphere	25%	18%	38%	20%	19%	6%	27%	11%	21%
If it was more family friendly	19%	12%	26%	18%	12%	3%	20%	7%	15%
More information about it	21%	11%	22%	10%	13%	17%	17%	12%	15%
A more welcoming environment	7%	10%	15%	8%	7%	3%	10%	6%	8%
Column n	82	125	32	61	78	36	133	74	207

Qnef1. Which of the following would make you more likely to try playing an alternative form of golf?
Base: Total not engaged by would consider alternative golf (n=207)

↑↓ significantly above or below average at 95% confidence

Nature:

Prepared by Ryan Stephens & Paddy Cain