

The Opportunity to Grow Golf: Youth Participation



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Dear Reader,

Welcome to *The Opportunity to Grow Golf: Youth Participation (2014)*

This report follows on from Syngenta's *Growing Golf in the UK (2013)* study, which was welcomed by leading figures and organisations in the golf industry as a positive contribution to the long-term business sustainability of golf clubs and courses.

Growing Golf in the UK (2013) was one of the largest and most comprehensive quantitative surveys ever undertaken with more than 3,500 UK residents questioned, including golfers, lapsed players and non-golfers.

A number of important themes emerged from the research, including the need for friendliness and family participation at golf clubs to customers' desire for fine course conditions.

What also emerged from the research were two clear growth opportunities for the UK golf industry focused on:

- Female participation
- Youth participation

We wanted to investigate and understand these opportunities further and in greater depth. Working with GfK, one of the largest and most respected market research companies in the world, we set about designing two qualitative studies enabling us to listen carefully to what women and young people in the UK thought about golf, what would encourage them to play more golf or take up the game.

Specifically, the objectives of *The Opportunity to Grow Golf: Youth Participation (2014)* were to:

- Identify the needs that sports fulfil – and how golf fulfils these needs
- Understand the reasons why current young players enjoy golf
- Understand what would encourage young people to be interested in golf and ultimately take up the game
- Identify the barriers to playing golf from a youth perspective
- Gauge reactions of core golfers to a range of initiatives to understand their level of acceptance to change.

While some of the responses from the series of focus groups might have been expected, listening carefully to what young people have to say about sport and golf, what interests them and what would engage them further is enlightening.

In many ways, what youth say about golf in terms of its friendliness (spending time with friends and family; customer service) and flexibility (opportunity to play 9-holes rounds; dress codes) is consistent with what many existing golfers and prospective players say and want.

From a business perspective, youth participation is an important strategic opportunity for golf as a sport and a business. Giving young people opportunities to engage in golf in a way that will enable them to enjoy the many benefits it offers as a sport and social activity will help develop long-term participants and customers.

While national organisations – including the excellent ongoing work being achieved by The Golf Foundation and ClubGolf in Scotland, part of The Ryder Cup legacy programme – offer support, advice and structured schemes, we would encourage golf courses to use this research to think about how they approach the youth market, what they offer young people as customers and the strategic opportunities in relation to their individual business models and local markets.

We hope the results of this listening exercise, and our growing portfolio of market research, which is free to download from www.greencast.co.uk, offers insights and intelligence that will help golf clubs and courses make decisions about how to retain existing customers and attract new players, securing their long-term business sustainability.

We welcome your feedback, ideas and examples of successful initiatives at club level that are helping to grow golf. Please contact us at: golf.syngenta@syngenta.com



Simon Elsworth
Syngenta Head of Turf & Landscape (EAME)

Industry Viewpoint



The Opportunity to Grow Golf: Youth Participation (2014) report is greatly appreciated by the Golf Foundation. It confirms much of our own understanding of young people and their perception of golf whilst also offering new insight into ways of recruiting and retaining more young people in the sport.

The negative perception of the golf club environment by young people, both golfers and non-golfers, reflects previous insight as well as the view of golf as a technically difficult sport played over the traditional 18 holes for a long period of time. The importance of family and schools is also understood, although the Golf Foundation has made great strides in England in recent years with its adapted school initiatives, Tri-Golf and Golf Xtreme, helping to grow the number of schools delivering golf from 14% in 2004 to 44% in 2010 (DCMS School Sport Survey). Since 2010, changes in the sporting landscape and the demise of School Sport Partnerships have made the reach into schools much more challenging, which is possibly reflected by comments from young people in this study.

Reassuringly, several of the factors identified by the study to encourage young people to start golf are already being applied by the Golf Foundation and its partners. A network of HSBC Golf Roots Centres offer affordable coaching with a PGA Professional,

access to free equipment and registration on the new online Junior Golf Passport programme where a games led approach to learning is encouraged. New competition formats are being delivered through the School Games such as Tri-Golf festivals and Super Sixes where golf is played over six holes in an hour. A new community programme called StreetGolf is also taking golf to teenagers in their own environment away from the golf course. At the heart of StreetGolf is the PGA Professional Coach who can positively engage with the target age group and encourage them to progress into activity at the golf club. Other key partners such as England Golf are working with golf clubs to encourage a more welcoming junior environment at the golf club and a greater variety of competitions and events.

The Golf Foundation works in partnership with a variety of organisations responsible for young people in golf and wider sport such as ClubGolf Scotland, Golf Development Wales, England Golf, the Professional Golfers' Association, StreetGames and Sport England. This latest insight will help the Golf Foundation and its partners to refine and enhance the sport's offer so that more young people have the opportunity to experience golf and the benefits it has to offer.

Brendon Pyle
Development Manager and Acting CEO,
The Golf Foundation

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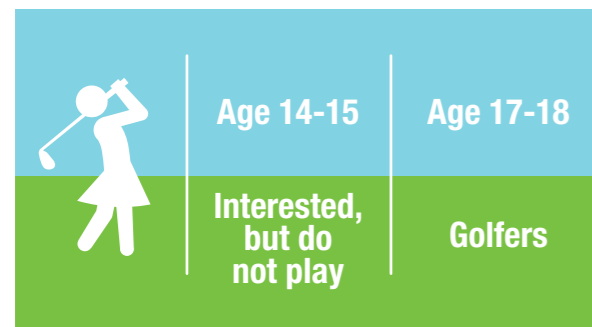
Methodology

The research was conducted in March 2014.

There were four 2-hour focus groups, each group comprising six or seven respondents in the 14-15 and 17-18 age groups.

The groups were single sex and made up of either junior golfers or young people who had expressed an interest in golf but who do not currently play. (Those with no interest in golf were excluded, as they would be unlikely to engage with the subject matter.)

FEMALE



MALE



ALL RESPONDENTS WERE IN THE ABC 1 DEMOGRAPHIC CLASSIFICATION



ALL ARE IN EDUCATION AND ASPIRE TO FURTHER EDUCATION



ALL PARTICIPATE IN A RANGE OF SPORTS AND HOBBIES

The research was conducted at professional market research studios in Watford and Wimbledon, with responses observed via two-way mirrors and recorded on video. Each session was facilitated by a specialist in youth market research and all work complied with the Market Research Society Code of Conduct.

Youth & Sport

While this report focuses on golf, we wanted to first identify what encourages young people to take up other sports and what the perceived drivers and benefits are. What can golf learn from other sports and what are the different drivers for boys and girls?

Factors encouraging uptake of sport



INTRODUCTION BY PARENTS AND/OR SCHOOL

It's clear that the influence of parents and schools is important in the uptake of sport among young people. It helps kindle interest, the development of basic skills and the understanding of rules in a comfortable environment.



APPRECIATE SPORT AS A SPECTATOR

Many young people are active in sports they watch on television, including football and athletics. The interest of following specific players or teams, and seeing them as sporting heroes and role models is an important factor.



DEVELOP SKILLS AT AN EARLY AGE

Helping young people develop skills at an early age helps them to become confident in a sport and potentially become active participants or competitors. However, if a young person feels the majority of their peer group is better than them, they will often give up that sport.



ACCESSIBILITY

Once young people reach the 14-18 years age group, sport has to be accessible. While 14 to 15-year-olds are especially reliant on parents to transport them to their sports activities, many young people, particularly 17 to 18 year-olds, also become responsible for the costs of participation and equipment. So sport must be affordable to encourage uptake.

“You tend to do sports you learn about in school. My school does not do golf.”

Female non-golfer (14-15 age group)

“The more you watch, the more you want to play.”

Male non-golfer (17-18 age group)

Sports for boys and girls

BOYS

Boys are generally more competitive than girls, tending to show others what they can achieve and needing to look good among their peer group. Preferred sports include:



GIRLS

Girls are generally more social than competitive, tending to want to prove to themselves that they can do it. Preferred sports include:



Perceived benefits of sport

Young people have a clear view of how sport benefits them. As we will see later, golf – and the golf club environment – does not tick all of these boxes:



SOCIAL

Sport is an opportunity to build friendships and widen social circles



FITNESS

Young people see sport as enabling them to keep fit and toned by 'burning' energy (but if they don't sweat, it doesn't feel like exercise)



SELF-IMAGE

Sport helps young people project their self-image – they want to be seen doing something cool that their friends do, and look good while they do it



FLEXIBLE

Sport needs to be flexible and adaptable, enabling casual play to be upgraded to a competitive game e.g. knockaround football in the park



SKILLS

Young people need to see themselves improving at a sport – they lack confidence so they need to develop skills to become confident participants, otherwise they can give up easily



FUN

Young people want to enjoy sport and have fun with their friends. They see it as a way of de-stressing and forgetting about everything else.

Perceptions of Golf

While we think we might know how young people perceive golf, what's behind their thinking and can golf adapt to make itself more appealing?

While perceptions varied, some stereotypical views of golf were top-of-mind for non-golfers in our groups. Typically, the young people said golf is:



A SLOW, BORING GAME THAT LACKS PHYSICAL EXERTION



A GAME FOR OLDER MEN



TOO TIME CONSUMING


Young people are time poor, especially the 17 to 18-year-olds as they work towards exams. At this time, socialising is more important to them in their downtime. They see golf requiring a whole day out and they do not have enough time to play.

However, when asked if golf could be more flexible and scalable, they were more interested. Short courses and 9-hole rounds (but not 6-hole games) proved appealing formats.


“Now that I play golf with young people, I don't see it as an old man's sport. But I can see why people do – it is advertised and endorsed by oldish men.”

Male golfer (14-15 age group)


In general, while first responses were negative, especially among non-golfers, on reflection respondents expressed positive perceptions of golf, including:



IT IS A GAME THAT REQUIRES SKILL AND PRECISION



IT IS RELAXING AND ENABLES YOU TO SWITCH OFF



YOU CAN BOND WITH FRIENDS AND SPEND TIME WITH FAMILY



IT IS DIFFERENT TO OTHER SPORTS

The perceived culture of golf clubs did not appeal to young people. They believed they would have to control their behavior in a way that would make them feel uncomfortable and that clubs were not accepting of teenagers.

Even the golfers felt clubs were too restrictive and that things could be done to create a better social environment for young people, enabling them to meet and spend time with other young people, not adults.

What Makes Young People Take Up Golf?

While the young people expressed some common negative perceptions about golf, we wanted to find out how those who do play golf started in the sport.



FAMILY MEMBERS

The two main current triggers for starting golf appear to be fathers, or other male members of the family, and school.

Fathers and grandfathers are especially important in getting young people started in golf. They often assume a coaching role, teaching basic skills and encouraging teenagers to practice and improve their game.

Girls especially enjoy the bonding time with family, including fathers and brothers.



SCHOOL

Schools also have some influence in getting young people into golf, although this is on a piecemeal basis in England. Unlike Scotland, where the ClubGolf project is aiming to create opportunities for all school children to experience golf, including an average of 40,000 primary school children, relatively few schools in England offer golf as an activity. Even if they do, coaching is variable and additional fees may be required for the provision of a coach or visits to a golf facility where children may not systematically receive coaching.

Other triggers for starting golf included:



ENJOYING THE TECHNICALITIES OF GOLF AND DEVELOPING SKILLS, AS WELL AS LEARNING THE RULES



BEING OUTDOORS



RELAXING / DE-STRESSING



GOLF IS HEALTHY FOR MIND, BODY AND SOUL, NOT JUST A FITNESS ACTIVITY.

What is Important to Young People?

Having listened to their perceptions of golf and understood more about what triggers current participation, we wanted to pinpoint what really matters to young people in relation to golf.

GfK's Market Opportunity and Innovation (MOI) roadmap incorporates an analysis framework based on the belief that emotional experiences drive consumer choices and perceptions. Many years of market research experience show that consumer needs fall into four key 'cornerstone' categories:

-  **GRATIFICATION** (I'm worth it)
-  **WELL-BEING** (I feel good)
-  **SECURITY** (Peace of mind)
-  **FREEDOM** (Frees me)

Most important to golfers were:

-  **SKILLS IMPROVING OVER TIME**
-  **RELAXING**
-  **FUN AND ENJOYMENT**
-  **COMPETITIVE SUCCESS**
-  **PERSONAL CHALLENGE**

Ultimately, the most compelling benefits of golf for youth are focused on the cornerstones of gratification and well-being.

For non-golfers, the range of key benefits were wider, but common benefits included:

-  **SENSE OF SATISFACTION**
-  **FUN AND ENJOYMENT**
-  **BEING WITH LIKE-MINDED PLAYERS**
-  **SKILLS IMPROVE OVER TIME**

The lowest-ranking benefits were:

-  **STATUS** (all)
-  **SENSE OF BELONGING** (golfers)
-  **BEING WITH LIKE-MINDED PLAYERS** (golfers)
-  **ETIQUETTE** (all)

In summary, there is a potential miss-match between the essence of a traditional golf club and what young people want in a sport. Status and etiquette were not compelling propositions for the youngsters. However, the sense of belonging and being with like-minded people was ranked low by young golfers not because it is not important to them but because they felt they were not experiencing it to date.

In fact, youngsters feel uncomfortable in a club environment. The young golfers in our focus groups said they felt "they shouldn't be there" and that the stuffy formality of etiquette meant they couldn't behave as teenagers naturally would.

What's Stopping Young People Taking Up Golf?

Next, we asked the young people if they thought there were barriers to playing golf and, if so, what they thought these were. Here are their perceptions:



DIFFICULT TO START

Young people recognise that to start golf you need coaching, learn basic skills and practice. Boys, in particular, do not want to look foolish and said they would invest time on a practice range to reach a reasonable standard before going out on a course. However, without the ability to practice at home in the garden, they are not sure how they can improve. They also believe golf is expensive and that they need to be a member of a golf club to receive coaching. The all-round perception is that golf is not easily accessible to them.



A GAME FOR OLD PROFESSIONALS

Unlike football where top players are much closer in age to teenagers, golf professionals appear to be "old". (See the section on Role Models.)



STUFFY VENUES

Golf venues, especially golf clubs, are perceived to be for the older generation – and not for young people.



LACK OF ADAPTABILITY

Golf's traditional 18-hole format seems to be less adaptable and less scalable than other sports. Football can be a kickaround in the park, a 5-a-side social game at a leisure centre or a full 11-a-side team game. However, the non-golfers in our groups thought that golf was purely an individual game.



MEDIA COVERAGE

TV coverage of golf is considered to be slow, boring and aimed at older people – teenagers struggle to connect with golf through tournament coverage. Even the golfers in our focus groups said that golf on TV was a turn-off.



AT ODDS WITH TEEN CULTURE

Golf is seen as boring, formal and full of etiquette at odds with teen culture.



COMPLICATED

Young people in our groups viewed golf as a complicated sport with numerous rules.



WEATHER DEPENDENT

Young people see golf as a sport that can only be enjoyed in the summer months – not an all year-round game.

“For golf you have to buy the membership, the clubs, the shoes and everything else, it's quite expensive.”

Male non-golfer (17-18 age group)

“If I was going to take up golf I wouldn't know where to start, where to go, what to buy. I wouldn't have a clue how to get into it.”

Male non-golfer (17-18 age group)

“If you watch golf on the TV, it doesn't look appealing. They just hit a ball – it doesn't look very active.”

Female non-golfer (14-15 age group)

“I used to play with my dad when I was younger, but it's just not fun and it takes such a long time.”

Male non-golfer (17-18 age group)

“It's a bit boring for young people. All the older men say, “Shush, be quiet!” when you are on the course. But teenage girls aren't quiet, they want to talk and laugh – it's like a lot of people are saying they don't want you there.”

Female non-golfer (14-15 age group)

“For golf, the professionals are better when they are older but for other sports, like tennis, they are 20 and it could be us in a few years. But we don't look at golf and think, ‘Oh that could be us in 20 years’. It's not as fresh.”

Male golfer (14-15 age group)

Golf's Role Models

High-profile role models can stimulate interest and participation in a sport. With young British stars Rory McIlroy and Charley Hull flying high on the world golf stage, does golf inspire young people?

When teenagers were asked about top professional golfers, few names could be recalled.



TIGER WOODS was the best known among the young people. As well as golf, Woods is associated with advertising campaigns and celebrity culture, in the way footballer David Beckham is, which appeals to teens.



RORY MCILROY was quite well known and appreciated as a young talent. However, he was perceived as lacking in personality and the 'wow' factor that teenagers can connect with. Lee Westwood and Ian Poulter were also mentioned by the boys.

No one could name a female professional. The groups pointed out that there were no advertisements for female golfers. Some girls thought that unless golf was taught at school, the perception would be that golf is an all-male sport.

“There's no advertisement of females playing. You hear about Tiger Woods but you don't hear about any females.”

Female golfer (17-18 age group)

“It's all men and no women. If we could have someone we could look up to then you would become more interested.”

Female non-golfer (14-15 age group)

What Would Encourage Young People to Start Golf?

So what can golf do to attract new young players into the sport? Specifically, what can clubs and courses do to develop a future pipeline of players while maintaining their existing core customers?



AFFORDABLE RENTALS

The perception that golf is expensive and you need to buy all the equipment and/or join a club, could be overcome with affordable equipment hire or free rental. It may also offer an additional revenue stream to courses.



CASUAL DRESS

It's important for image-conscious young people to look good and wear clothes they are comfortable in. Golf courses may consider taking a more flexible approach to dress codes.



SHORTER COURSES

A solution to the problem that golf takes too long is shorter courses. While 6-hole courses are perceived to be too short, 9-hole rounds appeal to young people and could be made quicker with forward tees.



MORE AFFORDABLE CLUB MEMBERSHIP / GREEN FEES

For young golfers starting the sport, especially those whose parents are not paying for them, the costs of the game need to be affordable. Some courses achieve this through flexible memberships and pricing.



MORE SOCIAL ENVIRONMENT

Young people don't feel comfortable in the traditional club environment and require a place to meet and share time with their own peer group



FAST-TRACK LEARNING ON BASIC SKILLS AND RULES

Introductory coaching packaged up into a fast-track scheme that gets new golfers started is more likely to engage new players than being left to themselves to start, or having to commit a long series of range-based lessons.



MORE AND BETTER TV COVERAGE

While more golf on free-to-view channels would expose golf to a wider audience, there is still a perception that TV coverage of golf needs to be made more exciting and fan-focused for it to inspire young people.



CREATING AN ENJOYABLE, FUN ENVIRONMENT

A number of the young people spontaneously cited Top Golf as a fun golf and social experience. While this requires a specialist facility, clubs and courses could think how they make their coaching / introductory schemes fun and social.



GOLF GAMES AND NEW FORMATS

Young people expressed interest in different formats including mini golf and golf skill activities, which could potentially be set up on practice ranges.

What Would Encourage Junior Golfers to Play More?

Nurturing current junior golfers could be an important objective for clubs and courses. We asked the golfers in our focus groups what it would take for them to play more and potentially recruit their friends to sample golf.



£££ LOWER FEES / LOYALTY SCHEMES

Price is often the first factor that is mentioned in focus groups, no matter the subject and audience. However, whether parents are paying for fees or the young person themselves, golf needs to be affordable and structured in a way that offers value. As suggested by the groups, this could include flexible loyalty schemes.



MORE RECOGNITION FOR ACHIEVEMENT

Junior golfers expressed their desire to see individual achievements and improvements to be recognized and that this would give them a greater sense of belonging to a club.



£ AFFORDABLE GUEST PASSES FOR FRIENDS

Young people will rarely play golf by themselves and so the ability to invite friends to join them was a welcome suggestion and something clubs might consider facilitating. Typically, junior golfers may only have one or two friends at a golf club, as well as a parent or family member.



IMPROVED SOCIAL SIDE

There were a number of discussions and points made about improving the social experience for juniors at golf clubs. For many, current club culture makes young people feel they shouldn't be there. Suggestions included a club for teens, their own area, as well as teen-friendly food options, décor and music. They also thought social events might be a good way to introduce friends to golf.



COMPETITION AT ALL LEVELS

It was clear that junior golfers want the opportunity to compete at all levels and that competitions should not just be for the best players. Engaging young golfers at all levels is something clubs may wish to consider.



EASY ACCESS

Juniors are limited by the need for parents to drive them to a golf venue. Clearly, easy access would help them play more, although finding solutions to this may be challenging for clubs.



FLEXIBLE PLAY

Some of the junior golfers said that 18-hole rounds took too much time. Most agreed that the option to play 9-hole rounds would be preferable.



ABILITY TO PLAY OTHER COURSES AT NO EXTRA COST

The more proficient junior golfers suggested that the opportunity to play different courses in their locality, at no extra cost, would encourage them to play more frequently.



ON-COURSE REFRESHMENTS

Young golfers want the ability to buy snacks and drinks while playing, either from a golf cart or hut on the course.



LESS MASCULINE ENVIRONMENT FOR GIRLS

Young female players said that golf clubs were masculine environments and they would feel happier and play more regularly if golf courses were more female-friendly.

“Not many people of my age are there. They are nearly all old men; none I can relate to, which is a shame.”

Female golfer (17-18 age group)

“If I know a club where it was 16-21's and I could make friends, I would consider it more.”

Female golfer (17-18 age group)

Reactions to Other Golf Concepts

Finally we asked the young people for their views on a variety of golf concepts to see if alternative formats held greater interest than the traditional form of the game.

CONCEPT	RESPONSES
TopGolf	Highly appealing; Social, fun and casual; Overcomes the perceived barriers to conventional golf; Develops skills; Competitive; Slightly expensive
SNAG (Starting New At Golf)	Some appeal; Ideal for beginners to hone skills or for family fun; Equipment too juvenile for some; Concept of setting up anywhere is appealing
Hack Golf (15-inch cup)	Lukewarm reaction; Erodes core fundamentals of golf; Appeals as part of a regime for beginners but lacks fun or technical challenge
FootGolf (football kicked around approx. 2,500-yard course)	Mixed reaction; Perceived to be very different to golf as it does not use club and ball which are seen as fundamental to the game; Appeals more to boys but not girls; One-off event rather than a regular activity or serious sport.

“I don't think I know one person who hasn't enjoyed TopGolf. People who don't like golf like TopGolf.”

Male golfer (14-15 age group)

“It doesn't seem fun anymore, just different.”

Female non-golfer (14-15 age group)

“It 's all about getting it in the hole, so it defeats the object.”

Female golfer (17-18 age group)

“It's not golf.”

Female golfer (17-18 age group)



Expert Analysis



What does the research tell us? Sue Gledhill, Qualitative Director Market Opportunity & Innovation at GfK – and someone who understands the golf club environment – managed the youth research on behalf of Syngenta. Here she offers some additional insight and analysis into the research findings.

Q. What were the key findings of the research?

A. The big headline is that it is not easy for youngsters to access golf. I was pleasantly surprised that there was an underlying interest in the sport, but to get them into golf and make them golfers is a long journey. There is a feeling among young people that they don't belong in the golf club environment – it is seen as something for mature men. However, existing juniors golfers expressed their sense of belonging in a competitive sense and really valued their coaches. This is where the golf industry can reach out to younger players, help them hone their skills and develop their performance.

Q. Were you surprised by any of the findings?

A. I was interested in how keen some of the regular golfers are to improve and how much time and effort they put in during the holidays. They really wanted to improve. They also spoke very positively about how golf is different to other sports. I was interested in how enthused they were to Top Golf – they spoke about it spontaneously and it ticked a lot of the boxes in terms of what they wanted. They could stay for just an hour, compete and spend time with friends, all in a safe and fun environment. The less competent golfers knew they wouldn't look foolish there, which is important because they want to project a positive image.

Q. What responses did you find most remarkable?

A. The groups spoke about golf clubs and the attitude towards young people. It was quite an emotive response. They felt they had to behave in a particular way and if they didn't, they were a nuisance. I felt a little bit sad that they wanted to be part of the golf world yet they didn't feel they fitted in and couldn't behave in the way they felt comfortable with. Not being able to express themselves naturally at a golf club takes the fun out of the sport. They also don't like having to dress in a particular way. For the girls, there was a very strong sense of how masculine the golf world feels – they wanted it to be more feminine.

Q. What was the mood among the young people as they discussed golf in the focus groups?

A. They were quite quiet at the start, especially the current golfers, but once we got into different issues around golf they opened up. We used a lot of techniques such as writing responses on a flip chart and card sorting exercises – teens generally can't talk for two hours – so it was very interactive. Once rapport had been built, they became very expressive. One of my slight concerns before was how long they would keep talking about golf, but they really did engage and we got a lot of deep emotional responses; they really enjoyed the sessions.

Q. Who is more influential in terms of introducing young people to golf – family or schools?

A. From a skills point of view, schools could be more influential. It would help young people to test the water and see if they had an aptitude for the game. In terms of enthusiasm for the game, that comes very much from the family and can be something that is instilled even at pre-school age. Coaching is also very important – where young people had a coach they connected with, it spawned enthusiasm for the game. Young people also want to be recognised for their achievements. One of the junior golfers said he thought it would be nice if the club captain acknowledged the juniors, but that the club seemed to feel the junior section wasn't important.

Q. Who should lead junior golf?

A. In my opinion, professional coaches. They are going to form the ongoing relationship and help develop performance. For the girls it would be good to have a female coach; for the boys I'm not sure it matters. However, they need to be able to connect with the coach and it may be the case that a younger coach would be engaging. In youth work generally, good leaders command respect by having a credible connection with youngsters.

Q. Based on the research, what would you suggest golf clubs can think about in terms of developing youth golf?

A. In terms of retaining existing junior golfers, it is important to create a sense of belonging, gaining recognition within the club and being able to compete and feel that they are making progress. For non-golfers, it is about ease of access to coaching and making beginners aware that equipment is available cheaply or free of charge so youngsters can test the water. Time is also a very important factor and being able to start at the lowest end of the learning curve in bite-size pieces will help give youngsters confidence to give golf a go.

Q. What are the opportunities for the golf industry?

A. I think there is a big opportunity for golf to get connected with schools and get it recognised in the curriculum. Offering the right level of coaching to ensure young people don't feel it is too difficult and give up is also important – give them a sense of fun without demeaning the traditions of golf. Ultimately, young people say it still has to feel like real golf and I think golf clubs can open up golf to youngsters and make golf enjoyable for them, while maintaining the core values.

Thank you for reading this report. Syngenta is committed to investing in market research to assist golf clubs, courses and ranges in their decision-making and benefit the long-term business sustainability of golf.

If you have any comments or questions, please contact us at: golf.syngenta@syngenta.com

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