

Who are Golf's Highest Potential Primary Segments?



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Existing On Course Frequency and Retention



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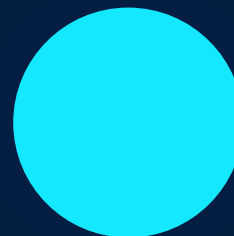
Alternative Formats Accelerate to On Course



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97% ?

Non-Golfers
Recruit



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Golf's Highest Potential Non-Golfers



Sports Participants, Male and Female, Parents



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What's Different, Better and Special about Golf?



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Health and Relaxation



Achievement



Connection



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Highest Potential Non-Golfers

Likelihood of participating in golf over the next 12 months

Current Intent: 23%

Post Concept: 55%



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Highest Potential Non-Golfers

Top rated 'motivates you to want to play golf' MOMI statements

That deep breath of fresh air as I stand on the tee and enjoy the beautiful views around me

My mind is focused purely on the golf and not my stresses and strains

My handicap improving knowing my practice is paying off

Watching my ball go exactly where I want it towards my target

Walking with my fellow golfers playing, competing and sharing stories about golf and life

Greeting my friends/playing partners at the beginning, full of cheerful anticipation for the fun challenge ahead

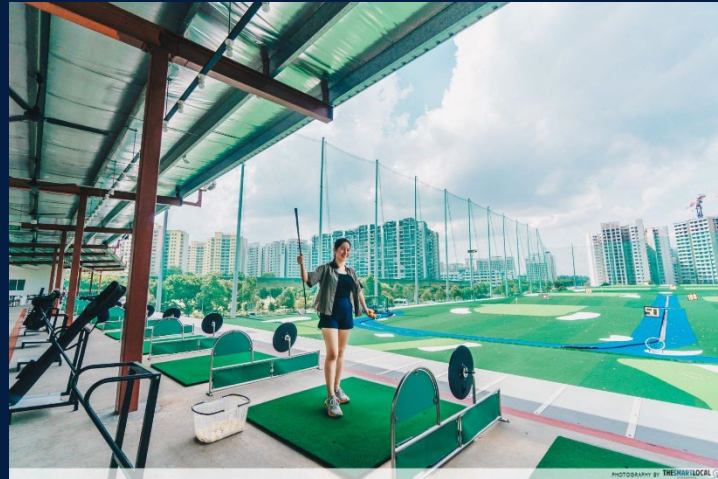


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R&A Segmented Global Assets.



Frequency and Retention



Transition to On Course



Recruitment to Golf

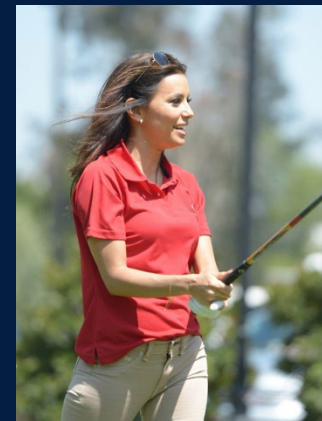
Core Positioning

Tailored message, media and product segmented by audience



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Image Matters.



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“Everything communicates. Everything we say and don’t say, everything we do and don’t do tells consumers about our brand ”

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