

THE R&A GOLF BAROMETER

SINGLE WAVE SUMMARY SINGAPORE

JUNE 2024



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About The R&A Barometer...

The R&A Barometer was launched in February 2022 and has gathered feedback from a nationally representative sample in the 9 core Barometer markets quarterly since then.

The Singapore Golf Association commissioned one wave of research using The R&A's Barometer framework, and this single wave was fielded in May 2024, alongside Wave 10 of the on-going programme.

The main aims of the Barometer are:

- To provide a single and consistent source of information on the levels of engagement with different formats of golf and interest in future participation.
- To give an up-to-date read of current attitudes and perceptions of golf, so that the impact of any specific activations or promotions can be assessed.

Findings give a read of the current situation in golf, and because the methodology and survey content are consistent, the findings are as comparable as possible between time periods and markets.

The single wave of fieldwork in Singapore gathered feedback from 2,000 people.

- Please note that because of the online methodology, the 55+ age group is under-represented compared to the population as a whole. The sample of 2,000 otherwise is robust enough to draw directional conclusions about the current situation of golf in the Singaporean market.

For this report, some of the findings from Singapore have been shown alongside The R&A Barometer 'Overall' figures for comparison.

- The Overall figures cover the results from 2023 across the 9 core Barometer markets (Canada, Argentina, GB&I, France, Germany, South Africa, Australia, South Korea and Japan) – a total sample of ~45,000 people.

Key findings



People in Singapore tend to engage with golf through **social media content** or **TV highlights** and over 2 in 5 have engaged with golf media in some form in the last year. **1 in 10** have played an on-course golf format in the past year. **9-hole** is a popular format, and golfers are **keen to explore** a variety of golf formats, with a **more than half** of golfers trying a new format of golf in the last year.



Women are well represented amongst golfers in Singapore – **2 out of 5 golfers are women**, and a similar proportion of golfers are **aged under 35**.

Social connections play a significant role in learning golf, with many players initially **learning the game through friends** or PGA professionals.

There is strong agreement that golf treats all genders equally, relieves stress, and provides a sense of achievement. Among current golfers, 71% feel that golf is **inclusive and welcoming**, and nearly three quarters believe it accommodates **people of all abilities**.



Interest in golf among non-golfers is notable, with a quarter expressing an **interest in playing in the future**.

Among non-golfers who *are interested* in playing in future, 81% actively wish **to learn more** about the game and 57% **would feel confident** in finding out more from the SGA.

Summary – Singapore

GOLF ENGAGEMENT

9%

played golf on a golf course in the last 12 months

5%

played an alternative format in the last 12 months

39%

of current adult golfers identify as women

Those who had played golf had played...

3

...different formats on average

GOLF ATTITUDES

Strongest average attitudinal agreement:

“Treats all genders equally”

“Good way to relieve stress”

“Provides a sense of achievement”

Agreement with health & wellbeing statements:

Good way to relieve stress (65%)

Gives a sense of freedom and relaxation (63%)

Good way to exercise outdoors (63%)

Good way to feel refreshed and rejuvenated (60%)

Good for your health (54%)

NON-GOLFERS

25%

of non-golfers are interested in playing golf in the future

28%

of non-golfers would like to find out more about playing golf

20%

of non-golfers would feel confident in finding out more about playing golf from the SGA

SINGAPORE IN CONTEXT

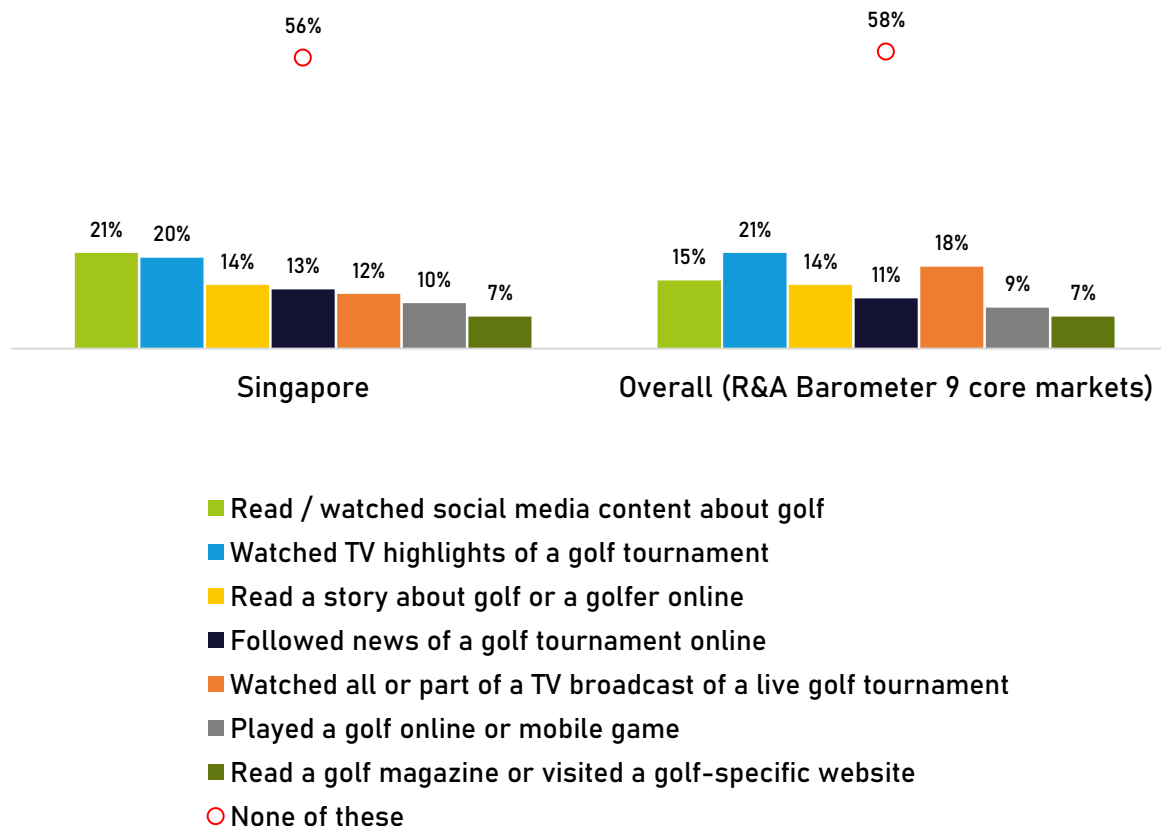


44% of people in Singapore have engaged with golf media in the last year.

Engagement is strongest through social media content and TV highlights.

Compared to the main Barometer sample, social media engagement is higher in Singapore, but watching live broadcast golf is lower.

Golf media engagement – last 12 months



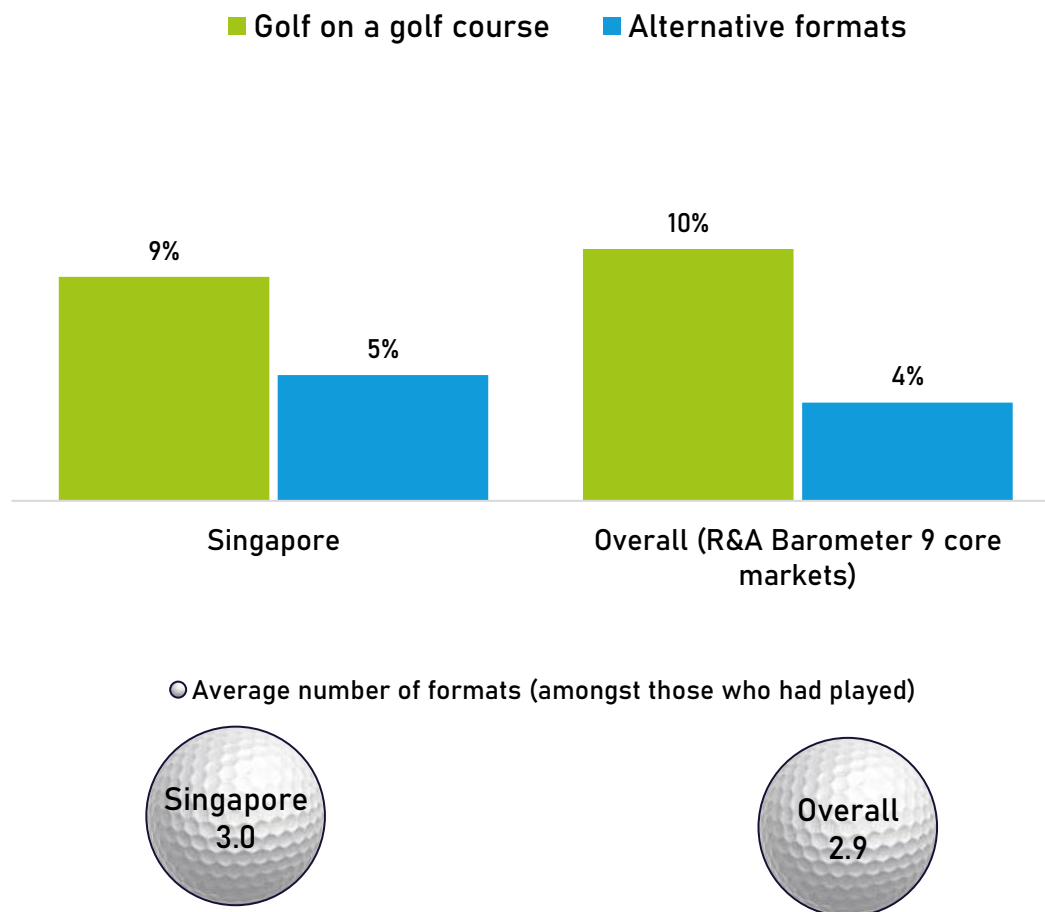
Base: Singapore (2,000), Overall – GB&I, FR, DE, CA, ZA, JP, KR, AU, AR (45,000)

How many have played golf in the last 12 months?

Around **1 in 10 people** in Singapore had played an on-course format (18 hole, 9 hole, 6 hole or par 3 / short course) in the last year.

Alternative formats were played by **1 in 20 people**.

Those who have played any type of golf in Singapore are likely to have played **3 different formats** – similar to the average of The R&A Barometer's core 9 markets.

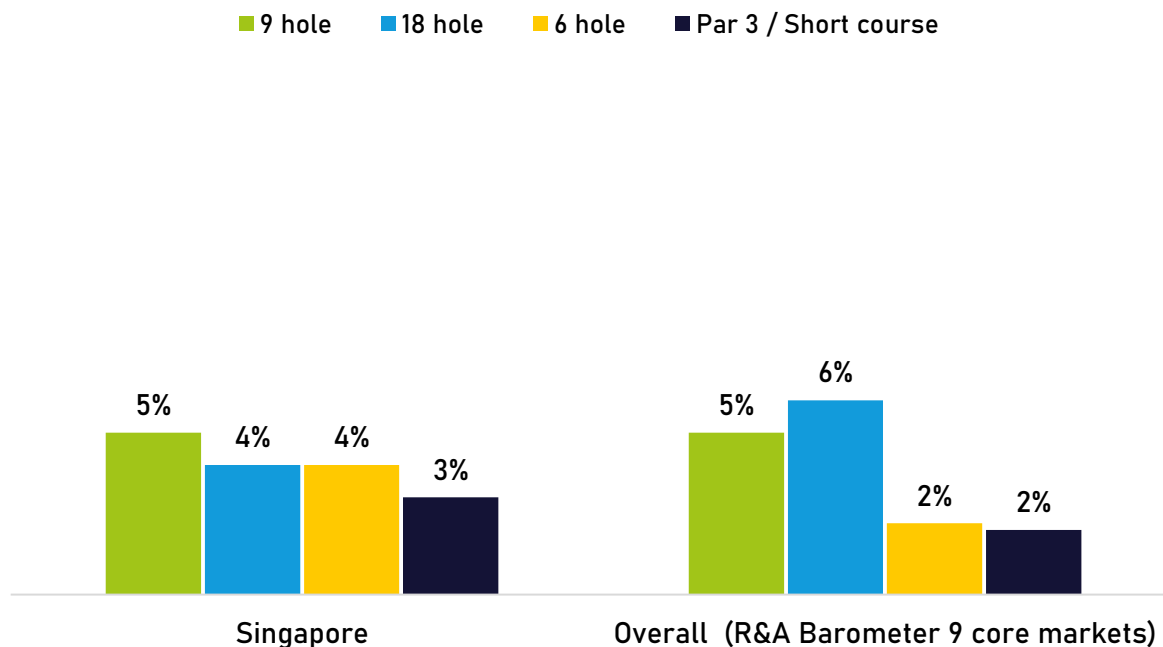


Base: Singapore (2,000), Overall – GB&I, FR, DE, CA, ZA, JP, KR, AU, AR (45,000)

Full-length 9 hole courses are the most played format in Singapore.

18 hole courses are played slightly less in comparison to the main Barometer sample.

What on-course formats were played?

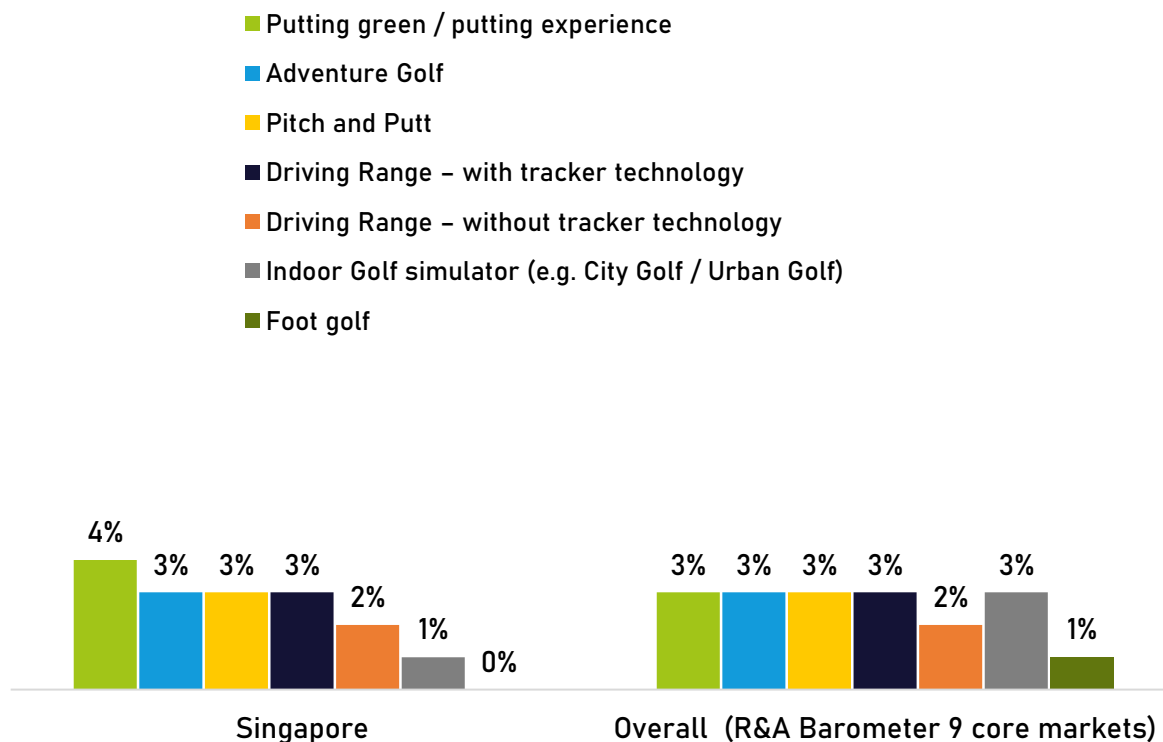


Base: Singapore (2000), Overall – GB&I, FR, DE, CA, ZA, JP, KR, AU, AR (45,009)

A range of alternative formats are played in Singapore, with **putting green / putting experience** having been played slightly more than other alternative formats.

Engagement with alternative formats is at a **similar level** to engagement with on-course formats in Singapore.

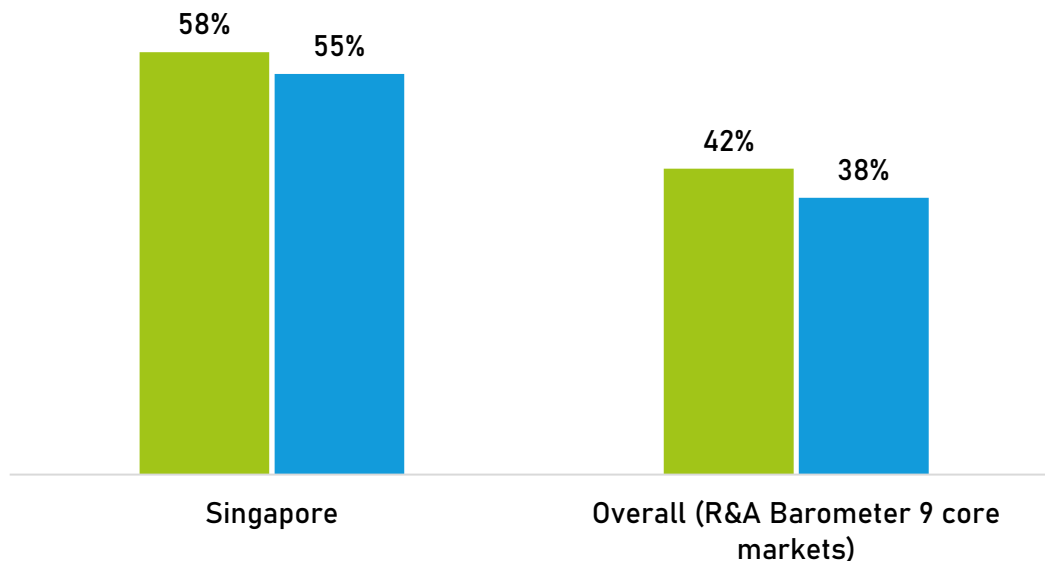
What alternative formats were played?



Base: Singapore (2000), Overall – GB&I, FR, DE, CA, ZA, JP, KR, AU, AR (45,009)

What proportion of golfers tried something new?

- % of golfers who played a new on-course format for the first time in the last year
- % of golfers who played a new off-course format for the first time in the last year



Amongst current golfers in Singapore, around 3 in 5 had tried an **on-course format for the first time** in the last year.

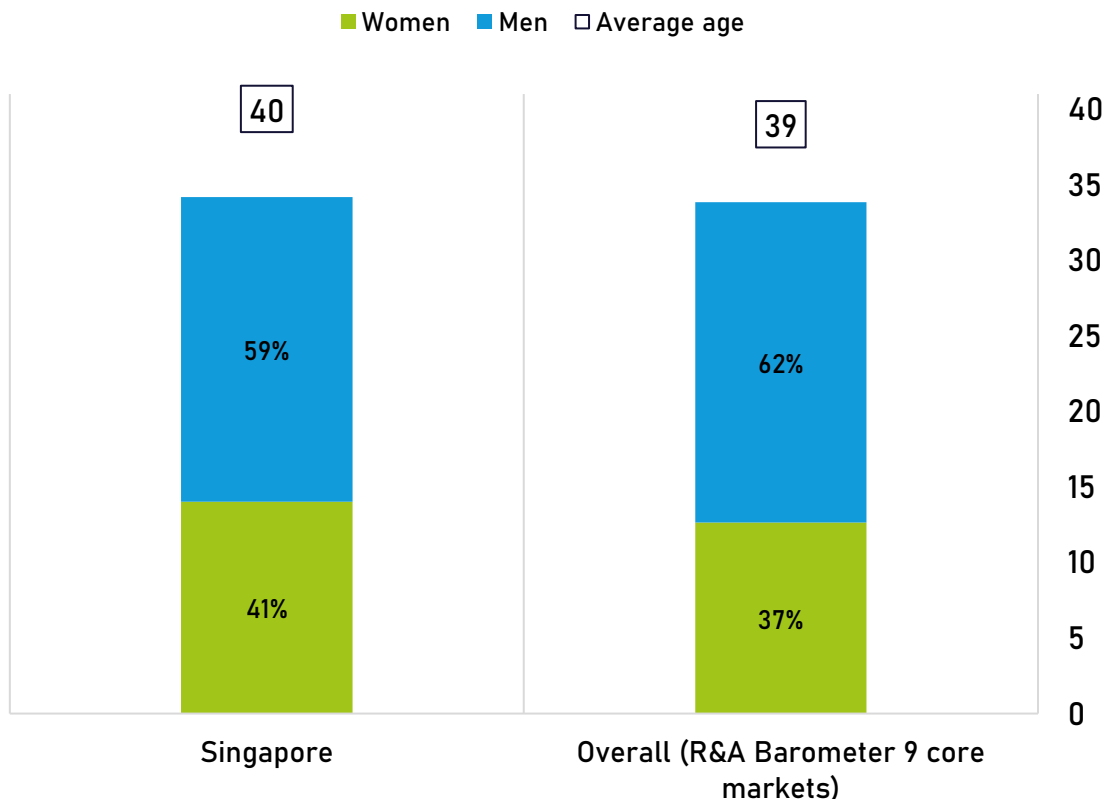
They are more likely to try a new format compared to the main Barometer sample with more than half playing an alternative / off-course format for the first time.

Note: these figures will include existing golfers trying a different format as well as golfers who had tried golf for the first time in the last year.

Base: Singapore (211), Overall – GB&I, FR, DE, CA, ZA, JP, KR, AU, AR (5122)

Who had tried something new?

Of golfers who had tried a new format in the last year...



Of golfers who tried a new format in the last year, two in five were **women**, and the average age of those who had tried something new was **40**.

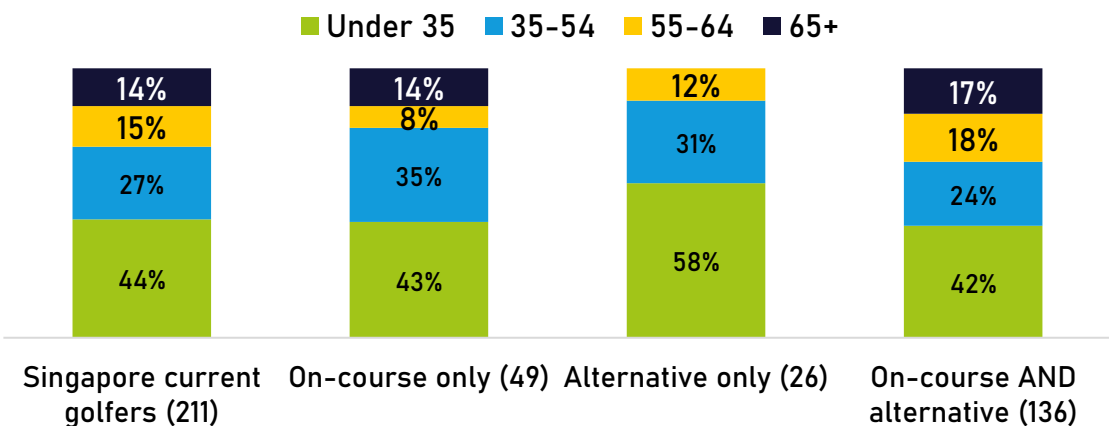
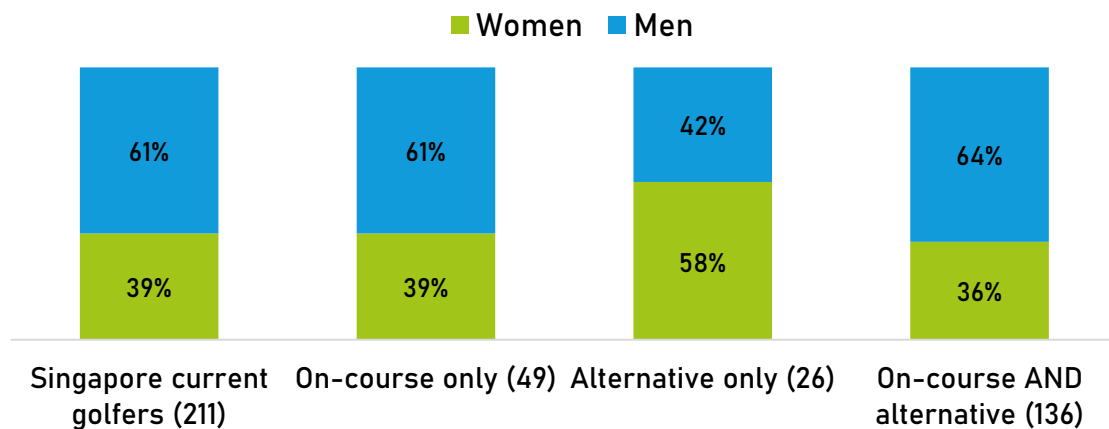
This is a **similar profile** to golfers who had tried a new format of golf within the overall 9-market R&A Barometer group.

Base: Singapore (170), Overall – GB&I, FR, DE, CA, ZA, JP, KR, AU, AR (3300)

GOLFER FOCUS



Singapore: Golfer profile – age and gender



Of current golfers in Singapore 3 in 5 are men, and 2 in 5 are aged under 35.

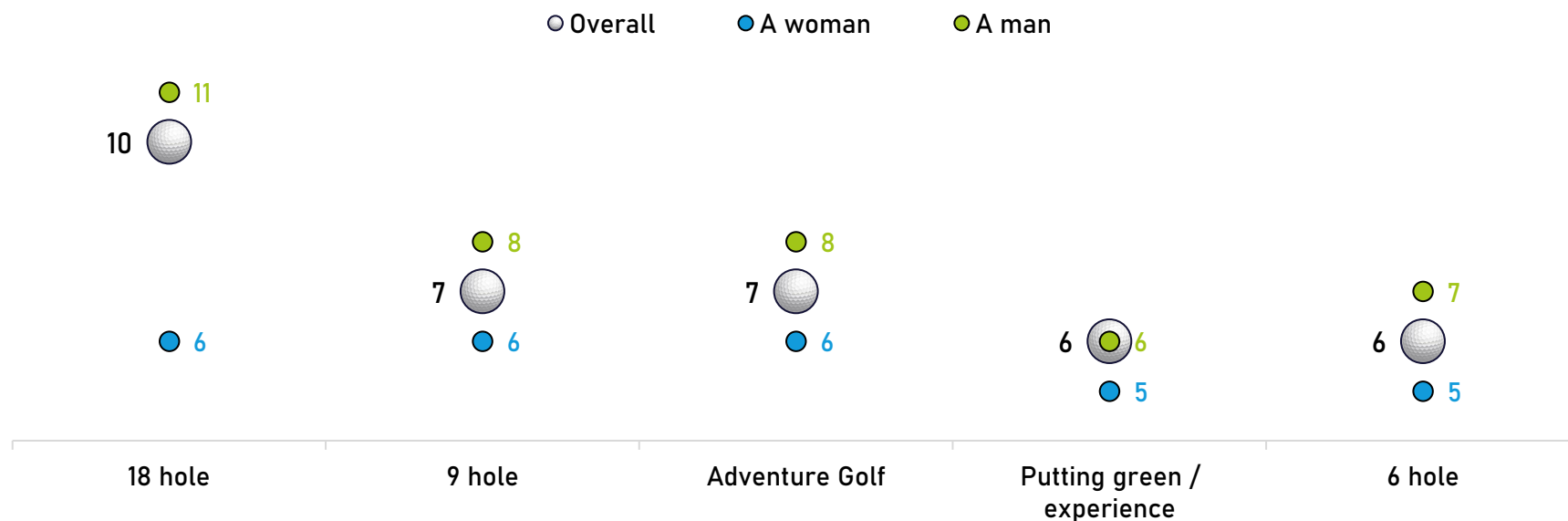
There is **consistency** in the profile of golfers who only play on-course formats and golfers who play on-course *and* alternative formats.

Despite a small base size, indications suggest that people who only play alternative formats, are more likely to be **women** and are more likely to be **younger**.

Base numbers shown in brackets !! Beware small base sizes

Singapore: Frequency of play – Top 5 formats

Chart shows frequency amongst those who have played each format at least once in the past 12 months, for the five most-played formats overall



Even though 9-hole golf is the most-played format overall, the most regular participation levels are seen for those who play **18-holes**. Men who play 18 holes are likely to do so nearly once a month on average, and women are likely to play once every two months on average.

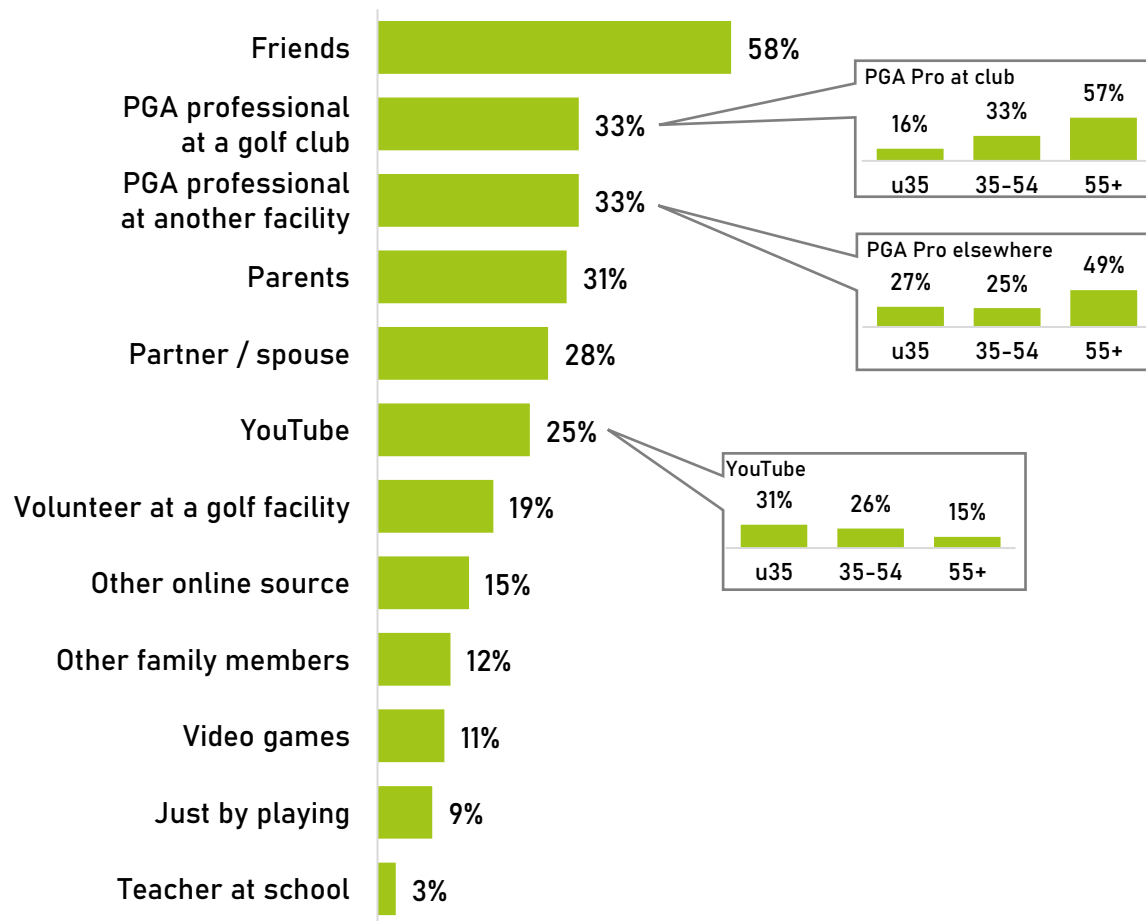
Base: 18-hole (81), 9-hole (96), Adventure golf (68), Putting green (76), 6-hole (71)

Most golfers in Singapore learnt to play golf through **friends**. This is more likely to have happened for women (69%) than men (52%).

A third learnt from a **PGA professional** at a golf club or other facility, and this is more likely to be true for older golfers.

Younger golfers are more likely to have learnt through YouTube than through a PGA professional.

Singapore: How did you learn to play golf?

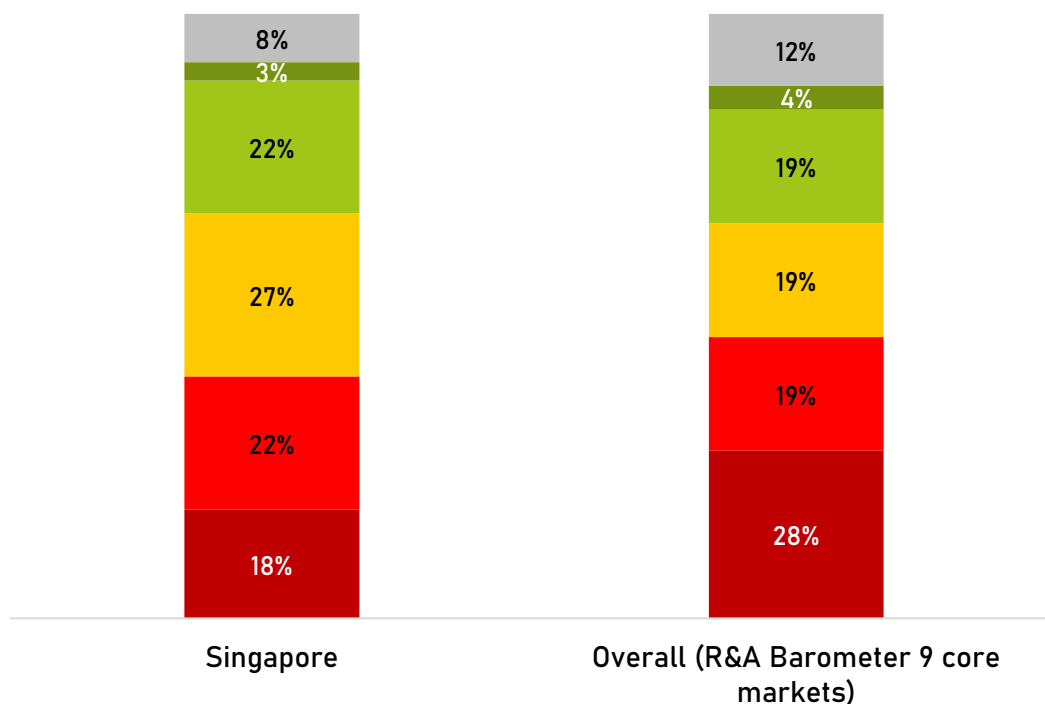


Base: 211

FUTURE INTEREST IN GOLF

Non-golfers: “I am interested in playing golf in the future”

■ Strongly disagree ■ Disagree ■ Neutral ■ Agree ■ Strongly agree ■ Don't know



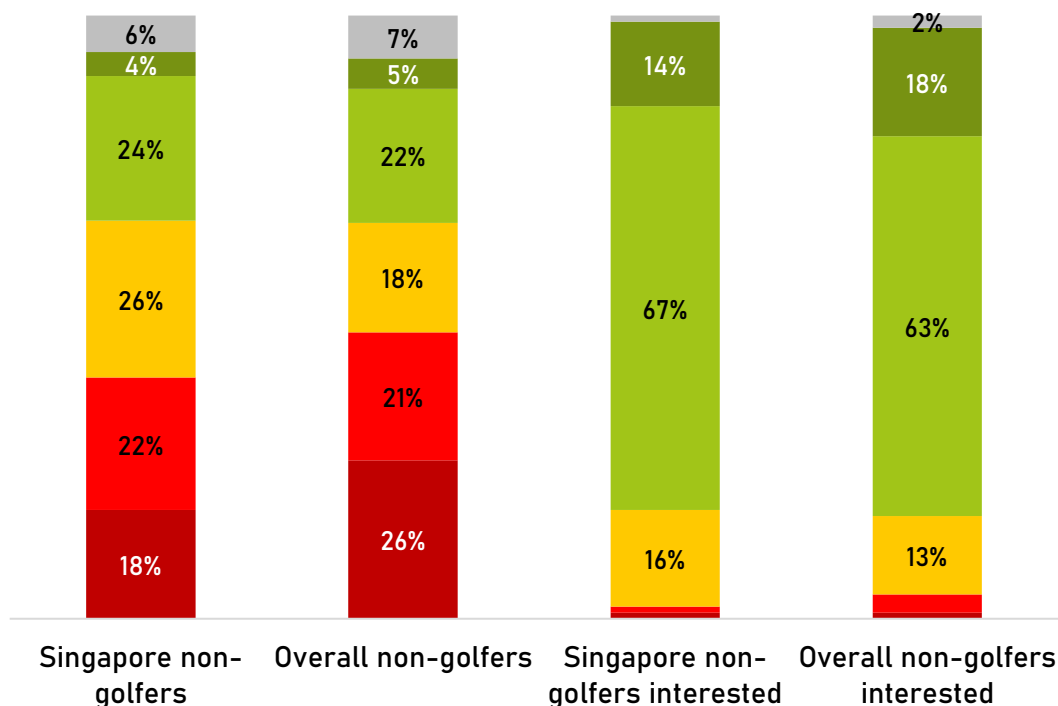
Looking at people in Singapore who have not played any type of golf in the last year, a **quarter** of this group say they **are interested** in playing golf in the future.

A further 27% are neutral, but not against playing golf in the future.

Base: Singapore (1150), Overall – GB&I, FR, DE, CA, ZA, JP, KR, AU, AR (23473)

Non-golfers: “I would like to find out more about playing golf”

■ Strongly disagree ■ Disagree ■ Neutral ■ Agree ■ Strongly agree ■ Don't know



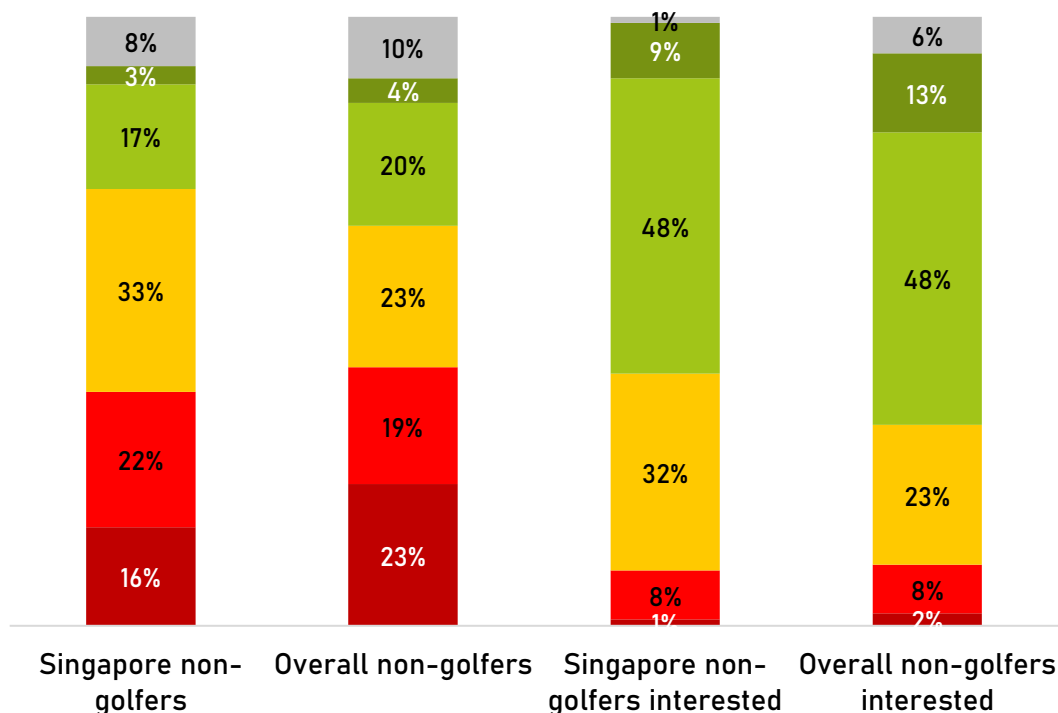
Again looking at people who have not played golf in the last year, nearly **3 in 10** in Singapore would like to find out more about playing.

Focusing on non-golfers who said they were interested in playing in future, **4 in 5** say they would like to find out more about playing golf.

Base: Singapore non-golfers (1150), Overall non-golfers (23743), Singapore non-golfers interested (281), Overall non-golfers interested (5312)

Non-golfers: “I would feel confident in finding out more about playing golf from my country’s national golf federation / association”

■ Strongly disagree
 ■ Disagree
 ■ Neutral
 ■ Agree
 ■ Strongly agree
 ■ Don't know

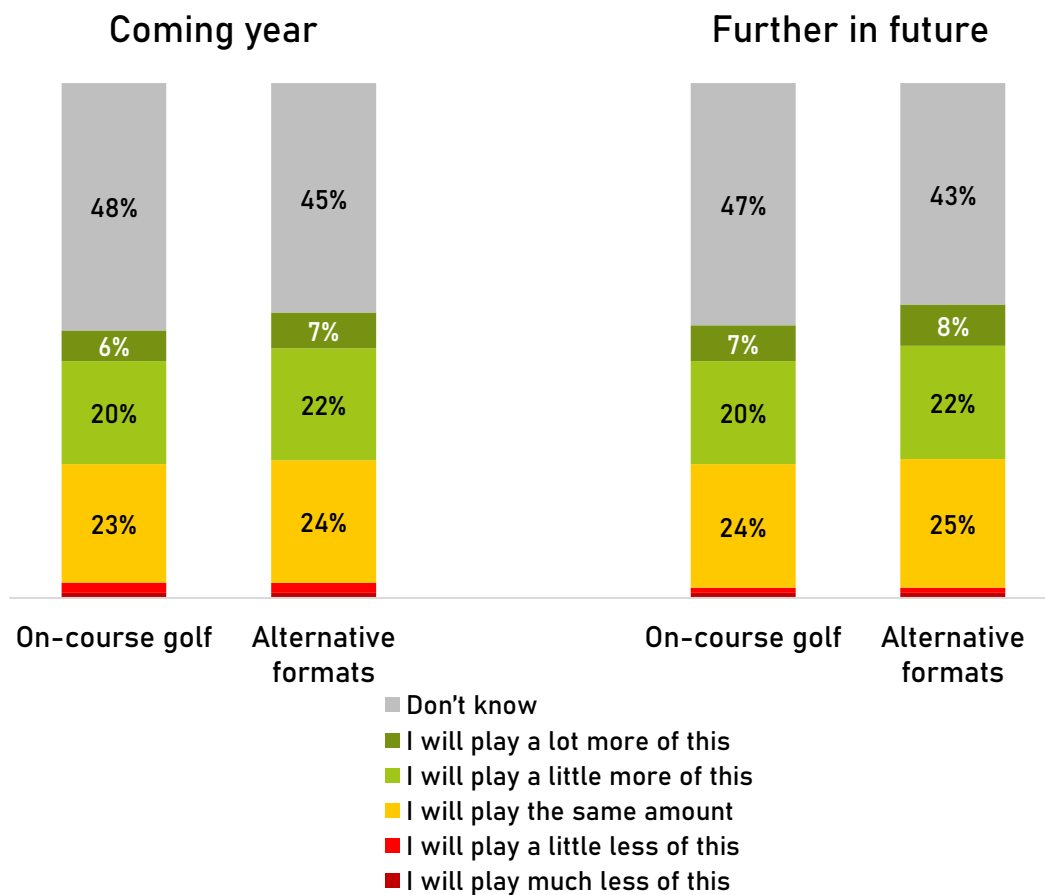


Of those who have not played golf in the last year, **1 in 5** in Singapore **feel confident** in finding out more about golf from the Singapore Golf Association.

Again this rises for people who are interested in playing golf in the future, with around **3 in 5 confident** about finding out more from the SGA.

Base: Singapore non-golfers (1150), Overall non-golfers (23743), Singapore non-golfers interested (281), Overall non-golfers interested (5312)

Singapore overall: Future golf intentions

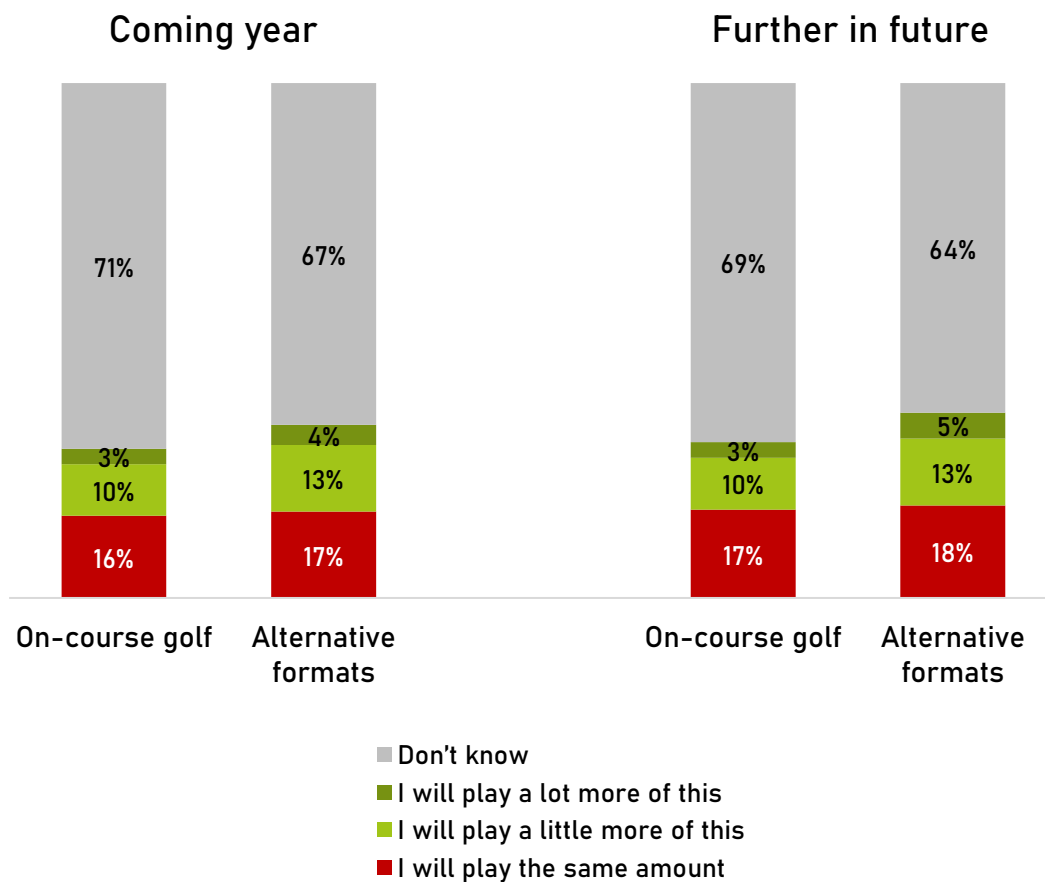


Looking at Singapore as a whole, more than a quarter of say they **will play more on-course golf** in the coming year, and nearly 3 in 10 say they will play more **alternative formats**.

There's little difference between intention over the next year and further in the future.

Base: 2000

Singapore non-golfers: Future golf intentions



Around 1 in 10 non-golfers in Singapore say they will play at least a little more **golf on a golf course** in the future.

Intention to take part in alternative formats more frequently is slightly higher, but most non-golfers say they **don't know** how their engagement will change in future.

Base: 1150

ATTITUDES TO GOLF



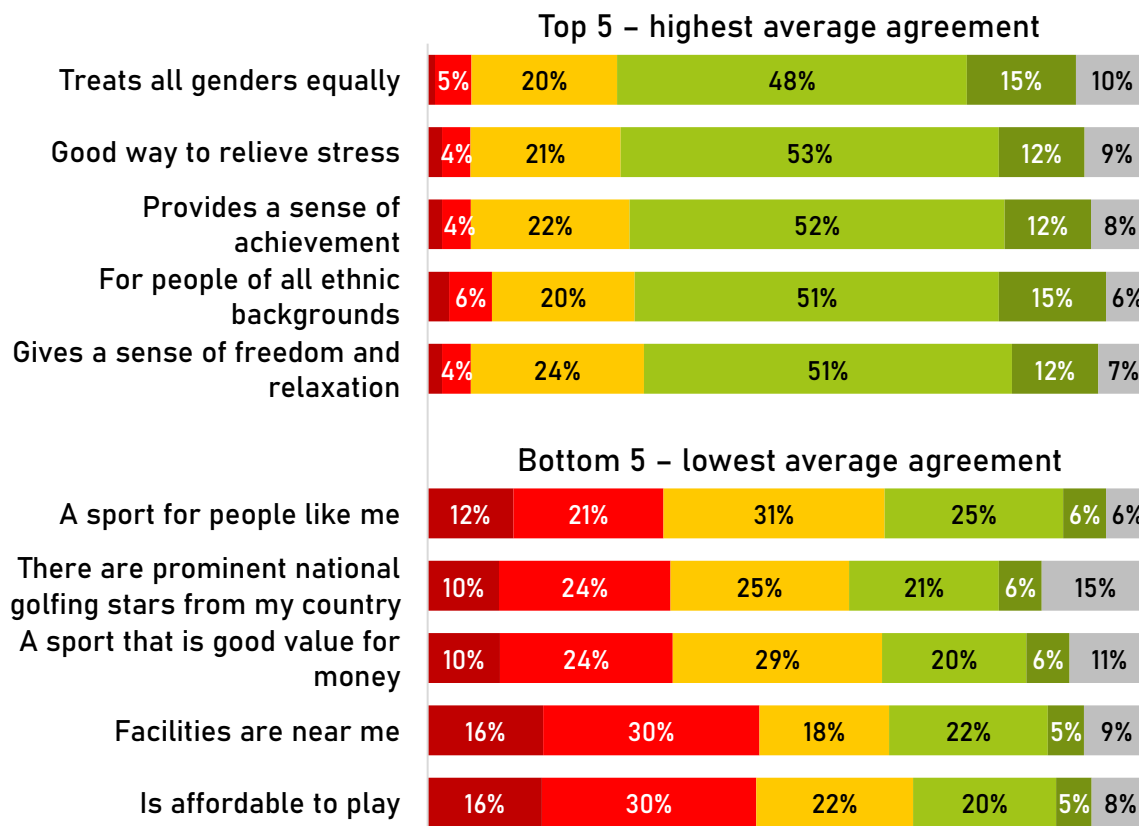
Looking at people in Singapore in general, there is a high level of agreement that golf **treats all genders equally**.

Agreement is also high that it **relieves stress**, provides a sense of **achievement**, is for people of **all ethnic backgrounds** and gives a sense of **freedom and relaxation**.

Disagreement is strongest that there are golf facilities **close to home** and that golf is **affordable** to play.

Perceptions of golf in Singapore

Strongly disagree Disagree Neutral Agree Strongly agree Don't know



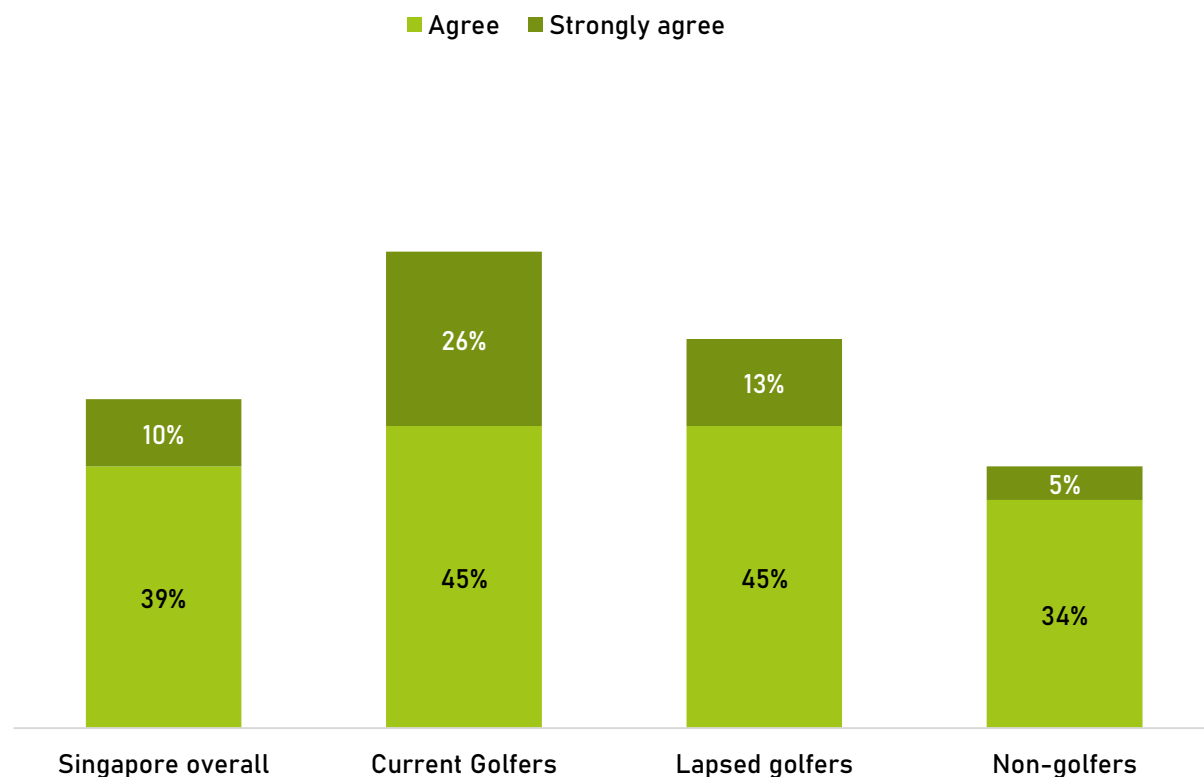
Base: 2,000

Image of golf in Singapore: “Inclusive and welcoming”

In Singapore overall, around half of people see golf as **inclusive and welcoming**.

Current golfers are most likely to agree, with 7 in 10 agreeing with this statement.

Even among those with no experience of golf, 2 in 5 agree that golf is inclusive and welcoming.



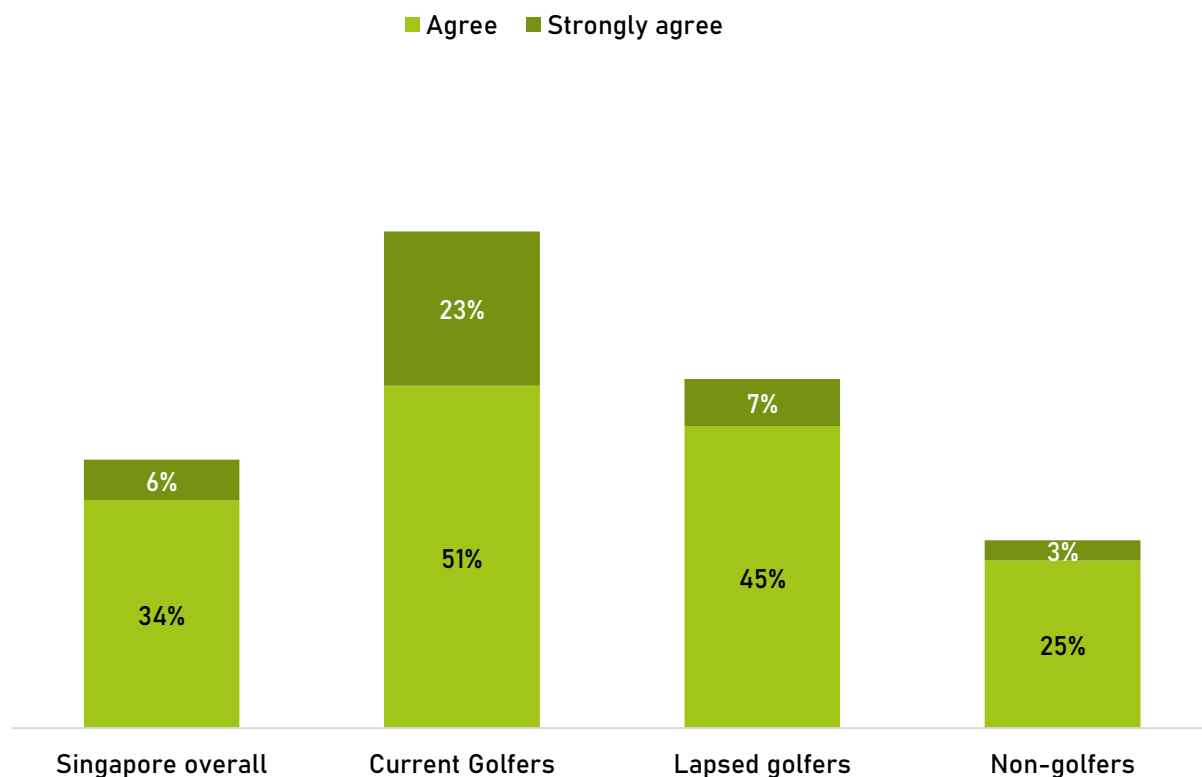
Base: Total (2000), Current Golfers (211), Lapsed golfers (639), Non-golfers (1150)

Image of golf in Singapore: “For people of all abilities”

In Singapore overall, 2 in 5 people see golf as **for people of all abilities**.

Current golfers are most likely to agree, with nearly three quarters agreeing with this statement.

Among those with no experience of golf, around 3 in 10 agree that golf is for people of all abilities.



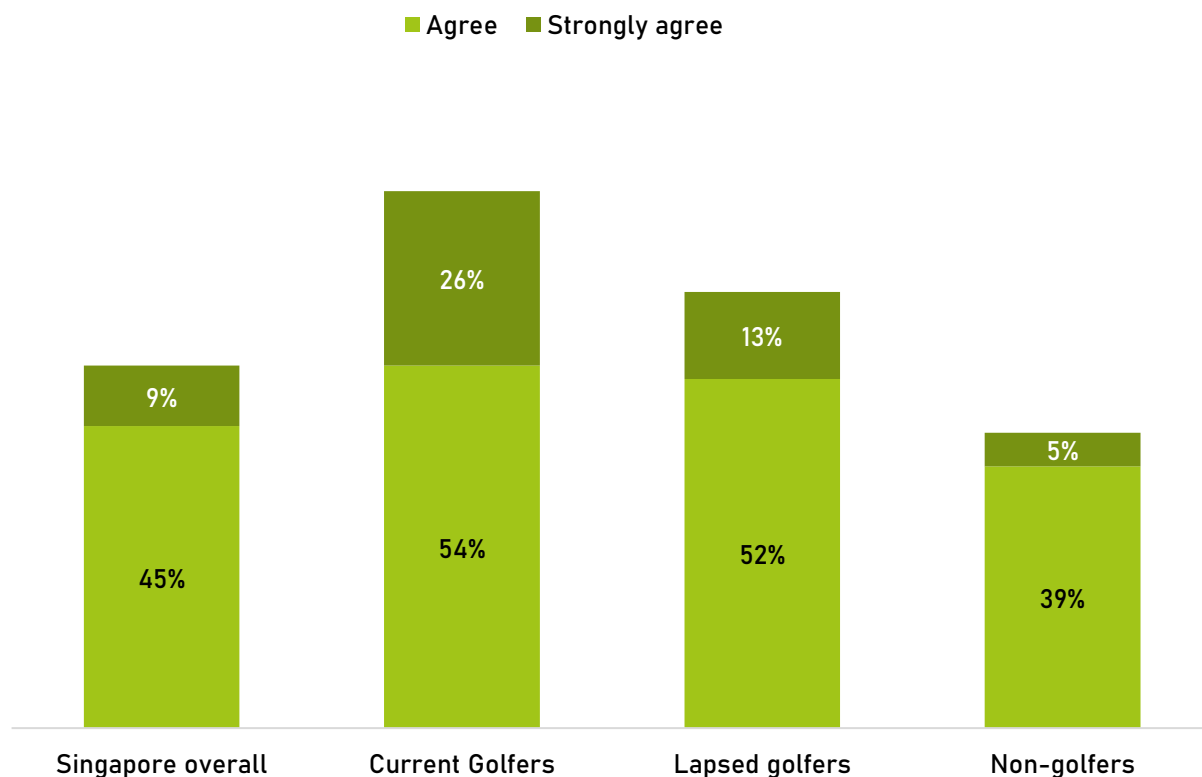
Base: Total (2000), Current Golfers (211), Lapsed golfers (639), Non-golfers (1150)

In Singapore overall,
over half of people as
good for your health.

Current golfers are most
likely to agree, with
nearly 4 in 5 agreeing
with this statement.

Among those with no
experience of golf, just
under half agree that
golf is good for your
health.

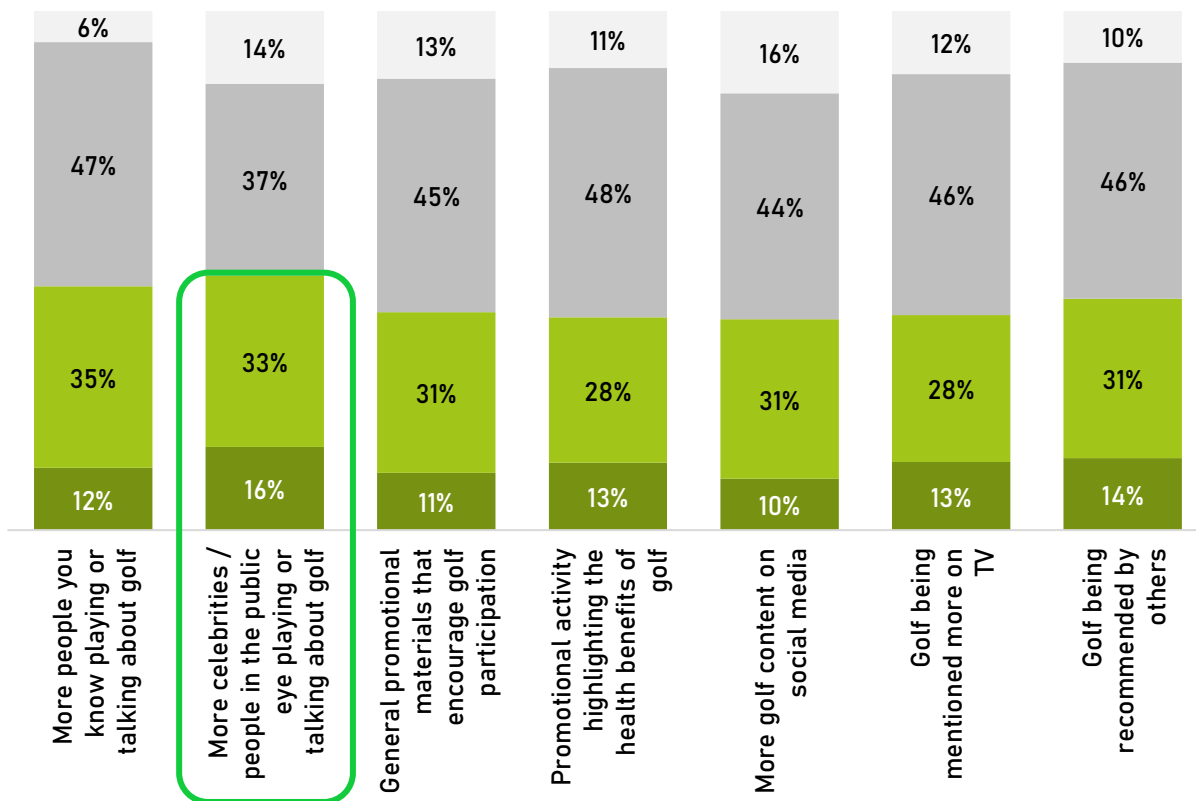
Image of golf in Singapore: “Good for your health”



Base: Total (2000), Current Golfers (211), Lapsed golfers (639), Non-golfers (1150)

Visibility of golf in Singapore: In the last 3 months, have you noticed....?

■ Yes definitely ■ Yes a little ■ No ■ Don't know



Looking at the cut through of golf in Singapore in general, many people have noticed golf being more present in the last three months.

People are most likely to say that they have noticed more **celebrities / people in the public eye** playing or talking about golf.

Base: 2000

Definitions

'On-course' formats include: Full-length course (18 hole), Full-length course (9 hole), Full-length course (6 hole), Par 3 or "short course".

'Alternative' formats include: Pitch and Putt, Putting green / putting experience , Adventure Golf (e.g. themed golf venue – Pirate Golf / Prehistoric Golf), Driving Range – with tracker technology, Driving Range – without tracker technology, Indoor Golf simulator (e.g. City Golf / Urban Golf), Foot golf, Golf on school pitches.

'On-course only' golfers are individuals who have played at least one on-course format but none of the alternative formats in the last year.

'Alternative only' golfers are individuals who have played at least one alternative format but none of the on-course formats in the last year.

'Total engagement' includes all formats of golf, but each individual is only counted once, even if they have engaged with several different formats of golf.

Adults are aged 18+ in all markets and are self-reported.

Juniors are aged 6-17 in all markets and their behaviour was reported by an adult in their household.

Junior engagement includes all formats of golf – on-course and alternative.



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