



Golf & Social Media: Golf Entertainment

Insights, Analysis & Solutions

syngenta.

Social listening data provided by Ipsos

Introduction

Entertainment golf venues were already enjoying exponential growth long before the pandemic, when demand for on-course golf took off dramatically.

In the US, participation at off-course urban ranges and putting venues where technology, gaming and hospitality combine, had increased from 5.4 million to 15.5 million since 2014, according to the NGF.

But could the influx of new customers to golf entertainment destinations have an impact on the image and reputation of golf, long seen as an exclusive, clubby pursuit for older white men? And, if so, could it influence off-course customers to sample or even convert to on-course play?

In Syngenta and Ipsos' pioneering study 'Golf & Social Media: The Great Divide,' which explored 16.1 million social media posts, shares, comments, articles and blogs in the US and UK over three years, there was an important, standout finding: there is a clear division between customers who perceive they are a golfer (Insiders), and those who don't (Outsiders).

Whether a customer is 'in' or 'out' is determined entirely by how they feel about golf and whether they perceive they belong: put simply, inclusivity.

Many customers at golf entertainment venues do not, and would not see themselves as golfers. But even a proportion of those who do play on grass courses, especially new and intermediate players, still see themselves as outsiders because they feel excluded. This is reflected in the way different customers speak about golf and the topics they engage with.

The polarization in perceptions, amplified on social media which our research analyzed, highlights a challenge for golf. But it also presents an opportunity. The trick for golf course businesses is to recognise how customers feel and create a journey and experience that engages, welcomes and retains those who play but currently count themselves as Outsiders, while retaining those who are already Insiders. Ultimately, inclusivity is just good business.



Expert Analysis

"It's an interesting fact that many people who see golf as exclusive, sexist or boring, are happy to participate at off-course golf entertainment venues.

"These destinations, of which Topgolf is the most frequently mentioned, benefit from a better image than golf courses and are seen as fun, entertaining and accessible experiences for friends and families.

"The potential barriers people perceive or face when thinking about golf courses and clubs – sexism against women, discrimination against minorities and a lack of access for disabled people – are largely non-existent at golf entertainment venues. It's as if the two types of experiences, off-course and on-course, are entirely disassociated, although some new players will learn at ranges and some golfers also practice there.

"Words and phrases that were prominent in our social media listening included, 'Topgolf', 'minigolf', 'friends', 'cocktails', 'birthday', 'Toptracer', 'nachos', 'date', and 'family'.

"Golf entertainment venues were active on social media, sharing engaging and viral content, portraying an experience that is far removed from the common perception of golf, even though the fundamentals of hitting a ball at a target or putting into a hole might be similar.

"Golf entertainment venues are also openly inclusive, proactively posting images that portray a diverse customer base including minorities, attracting the widest possible audience and making all prospective customers feel they can belong."



Claire Martin
Ipsos Social Intelligence Researcher

More Engaging

Our research showed that ranges and putting venues have a better image and reputation among the public than traditional green grass golf courses.

The defining factor and differentiation is 'entertainment.' These destinations are seen as open to all offering informal, inclusive experiences for groups of friends with food and drink on tap. PopStroke's brand tagline is 'Eat. Putt. Drink.'

The experiences themselves are described as, "fun" and "family friendly," and are seen as flexible in terms of competition. Regardless of ability, you can play and be as competitive as you like.

Unlike green grass golf, which is seen as a quiet sport, upbeat music at golf entertainment venues enhances the vibe and appeals to those looking for a party destination or date night. Correspondingly, brands such as Topgolf are active on social media channels, especially Instagram and TikTok, appealing to a young, dynamic and trendy community, engaging with golfers and non-golfers alike.



More Engaging



I mean minus all the games and stuff it is still a range. I have gone to my local Topgolf to seriously work on my game. Can make it a lot more fun than just hacking away at a standard driving range.



What to do with my man tonight? Arcade and mini golf? Escape room with friends? Anything else that avoids the wind outside and suited for a b*tch ballin' on a budget?



"Drive Shack is pretty fun for all ages. You can bring the whole family and have some fun family friendly competition!"



Places like Pop Stroke or mini-putt would just be an absolute blast to try with a bunch of guys and have a great time. I will say, the mini-games at Topgolf have been a lot of fun too. I really enjoy and want to play more of TopPressure!



Why aren't there more healthy non-drinking related things to do for adults besides eating or movies? Hiking, laser tag, mini-golf, thrifting, skating, going to dance/music shows... The list is endless once you make the right friends tbh



Image credit: Pitch Golf London

More Welcoming

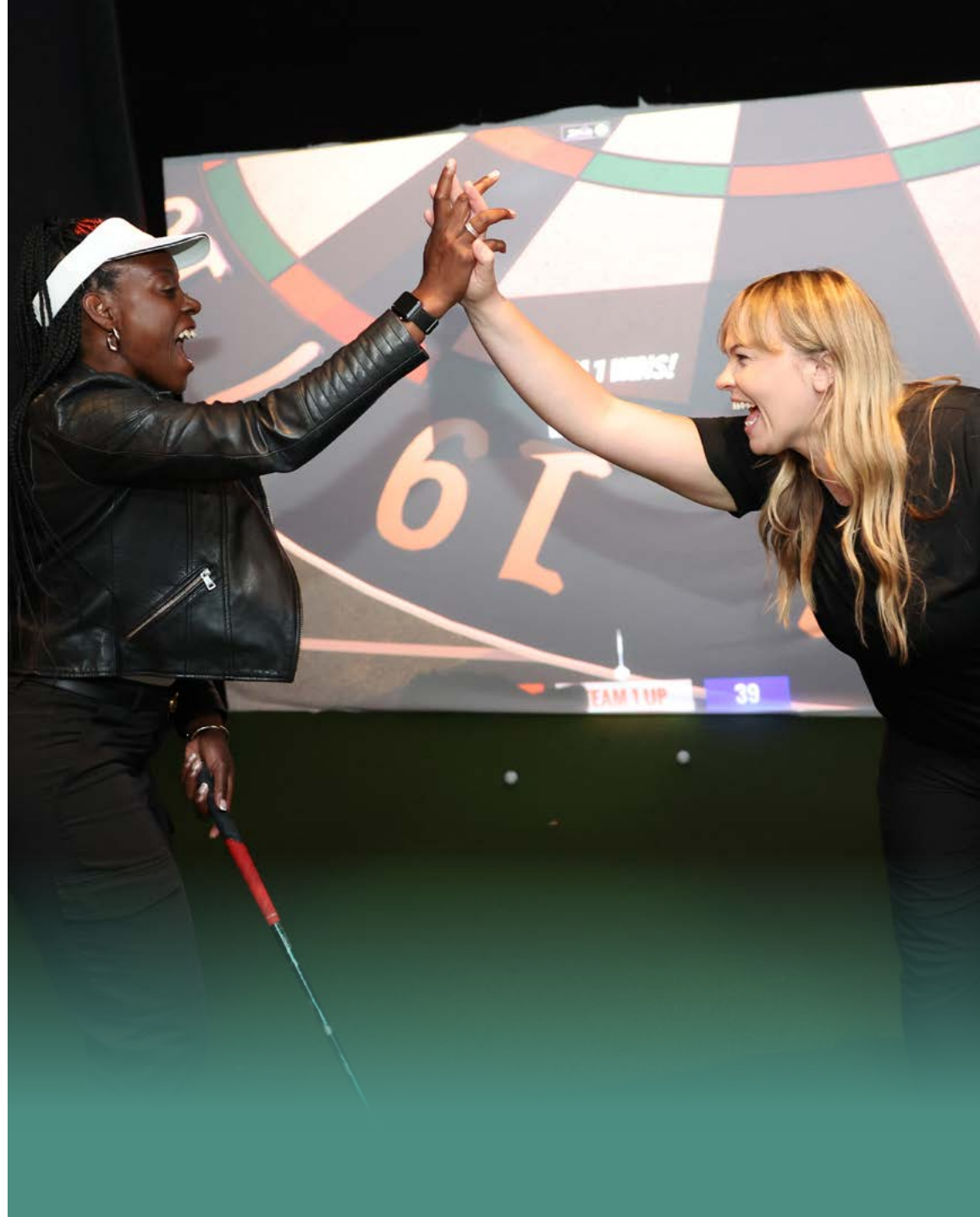
Golf entertainment venues are seen as more welcoming and less intimidating than traditional golf courses.

They also appeal to prospective new players interested in sampling the sport. Topgolf actively markets its venues as places to learn golf, with lessons and rental clubs available. The fact that there is no dress code, there are mixed abilities around, there is no pressure to perform or to be hurried along as you might on a golf course, makes it a more appealing to beginners.

From an emotional perspective, some golf entertainment venues are overt about their inclusive approach through staff diversity, open acceptance of all minorities (including the display of LGBTQ+ flags) and adaptive equipment for disabled people.

And from a practical perspective, many outdoor venues have floodlighting, enabling night time entertainment, while indoor venues offer year-round golf, including in locations where hot and cold climates can impact play.

Some customers express views on green grass venues being less sustainable than golf entertainment venues, creating a potential barrier, while urban ranges and minigolf venues are perceived as acceptable.



More Welcoming



Image credit: Pitch Golf London



The environmental impact of golf courses is ridiculous. They're 100 times bigger than mini golf courses, and 100 times less fun. If we just replaced every golf course with a mini golf course, we'd *trivially* solve global warming. ”



We have a pretty nice simulator place in Syracuse. Has 4-6 bays, full bar, etc. Turning Stone Resort have a beautiful indoor facility (golf dome) w/ range and short game area. Will hit both up as much as I can during the winter. ”

Forum



I think COVID, social media, and TopGolf are all things that have immensely helped make golf more mainstream and accessible. ”

Forum



I actually love what TopGolf has done in that respect. It gives people a low stress intro to the game that is fun and inclusive. ”

Forum



Top Golf is definitely a non-intimidating environment for beginners and fun for groups! ”



Mad props to @Topgolf for allowing their employees to show individuality – especially mad props to our bay host who had an “I Can't Breathe” mask. #BlackLivesMatter ”

Insights

"The emergence of golf entertainment has been one of the most seismic shifts we've witnessed in the industry in recent years. According to data from the National Golf Foundation (NGF), off-course play has skyrocketed by 55% since 2017, now totalling 32.9m participants. Compared with a more modest 8% growth in green grass players.

"It begs the question have green grass clubs and facilities missed out on new customers by not creating the right offer? Nearly a decade ago we carried out market research to look at youth participation and asked 'what would encourage young people to start golf?'. This revealed a number of pull factors, including the desire for casual dress, an enjoyable, fun, social environment and golf games and new formats. All areas golf entertainment venues excel at.

"In a separate, unpublished piece of research in 2017, we discovered that there were around 30m non-golfers in the US alone who indicated a very high interest to start golf within the next 2 years.

"While much of this latent demand appears to now be satisfied by golf entertainment venues, a huge opportunity remains for green grass clubs and facilities to close the gap by creating an offer that better fits with what this generation values most."



Mark Birchmore
Syngenta Global Head of Marketing,
Turf & Landscape



Solutions

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Posts and comments about golf entertainment accounted for 3% of all 16.1 million golf mentions on social media (US and UK, 2019-2022). It's quite clear that having fun with friends and family is the main motivation for these customers and that golf entertainment venues actively welcome a diverse audience. Using Instagram and TikTok to showcase experiences and reputations, it's clear to customers these venues are inclusive and that they will not be discriminated against regardless of experience, ability or background.

Claire Martin

Ipsos, Social Intelligence Researcher

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The key learning from our series of extensive social media studies is that golf has an opportunity to bring 'Outsiders' in, while retaining the loyalty of 'Insiders'. Golf entertainment venues and their success at attracting a huge, new diverse audience also presents a massive opportunity for golf course businesses. Creating inclusive, welcoming experiences characterized by fun and informality, promoted online with viral content, is something green grass golf venues can take and adapt. In this way, golf's image and reputation can also be improved, helping attract and engage new waves of customers.

Mark Birchmore

Syngenta, Global Head of Marketing,
Turf & Landscape

Case Studies

Find out more about the people, places and experiences shaping the world of golf entertainment:

Can Topgolf grow on-course participation?

In 2020, Syngenta Golf visited Topgolf in Orlando to learn more about how its Bays-to-Fairways coaching program is creating a customer journey into green grass golf. Watch the video and read the feature:



Park Golf

Park Golf is 3-hole, turf-based experience located in US public parks. Not to be confused with its Asian namesake, Park Golf provides the younger generation an engaging, easy access way to interact with the game.



Danny Sanicki

In between studying for a double major and playing golf in college, Danny Sanicki has amassed well over 300,000 TikTok followers with his entertaining mini golf competition videos playing alongside his twin brother and friends.



Timberlake backs golf entertainment concept

Pop superstar and golfer Justin Timberlake is the latest celebrity to endorse golf entertainment, but with a new green grass concept called 3s, featuring 12-hole floodlit par-three courses.



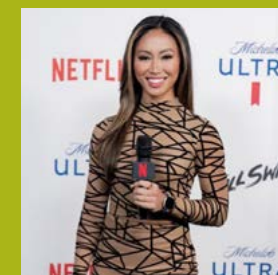
Swing City

Australia's newly launched Swing City features a 40-bay fully enclosed driving range equipped with Inrange technology, an 18-hole mini golf course and 'amusement shed', a state-of-the-art arcade.



Tisha Alyn

Tisha combined a love of golf with her vibrant personality to establish a sizeable social media following. She's a global ambassador for Topgolf and posts content from both her on and off-course experiences.



Short courses: creating fun experiences

Another example of green grass golf learning from golf entertainment, this time Olympic golf course architect Gil Hanse on the merits of fun, short courses, including his own 'The Cradle' at Pinehurst, South Carolina.



Grass Clippings

Arizona's first lighted golf course, Grass Clippings Rolling Hills is one of three public golf courses in Tempe. It also boasts an outdoor bar, events lawn and concert venue hosting unique golf and non-golf events.



Roger Steele

Promoting his posts using the hashtag #MakeGolfCool, Roger Steele prides himself on creating content in his most "authentic voice" and works alongside golf entertainment experiences including Topgolf and Five Iron Golf.



Market Insights

Golf & Social Media: The Great Divide is free to download from **www.syngentagolf.com**

Look out for our series of snapshot reports:



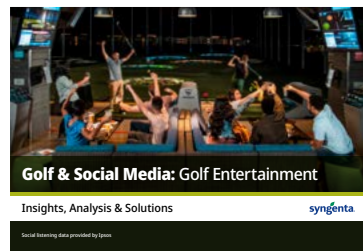
> **Sustainability**



> **Engaging Women**



> **Diversity**



> **Golf Entertainment**

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