

THIS IS **WHY**  
**GOLF**

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30.06.23

SPOTLIGHT ON

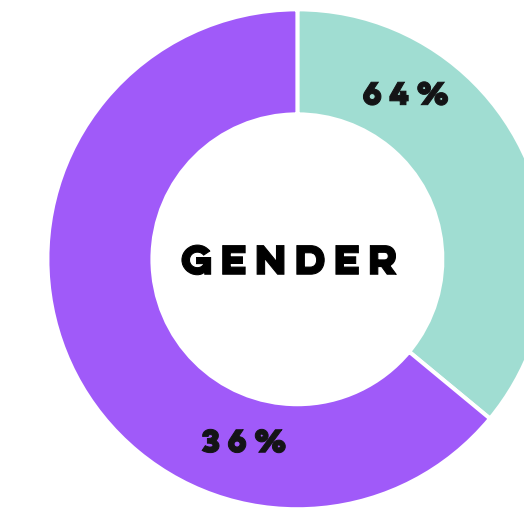
**GOLF FANS IN  
EUROPE**

# GOLF FANS IN EUROPE

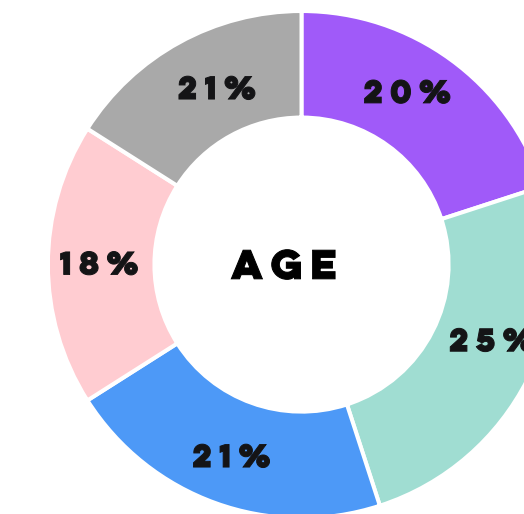
THERE ARE 26.7M GOLF FANS IN EUROPE, WITH 6.1M IN THE UK.

MARKET	% OF POPULATION INTERESTED	NUMBER OF FANS
UK	14%	6.1M
TURKEY	7%	3.7M
GERMANY	7%	3.4M
FRANCE	6%	2.1M
SPAIN	7%	1.9M
ITALY	6%	1.9M
RUSSIA	2%	1.5M
POLAND	5%	1.1M
NETHERLANDS	7%	728K
SWEDEN	11%	673K
IRELAND	22%	655K
ROMANIA	5%	502K
CZECH REPUBLIC	7%	467K
OTHER	-	2.3M

## EUROPE GOLF FANS



FEMALE MALE



16 TO 24 25 TO 34 35 TO 44  
35 TO 44 55 TO 64

# RISE IN WOMEN'S GOLF

€24.5M

The Ladies European Tour (LET) increased its overall prize purse from €20m in 2020 and €11.5m in 2019.

31

The LET hosted 31 events across 21 countries in 2022, up from 23 events in 2021.

235HRS

The LET gained more airtime in 2022, with 17 live televised events generating over 235 live broadcast hours in the UK.

€35M

LET members will compete for an even greater prize purse in 2023.

- **THE MALE-TO-FEMALE RATIO OF GOLF PARTICIPATION IN THE UK CONTINUES TO EVOLVE - NEARLY 1.5M WOMEN PLAYED AT LEAST ONE FULL ROUND IN 2020.**
- **95% OF THE 830,000 WOMEN WHO TRIED GOLF FOR THE FIRST TIME IN 2020 SAID THEY WOULD CONTINUE.**
- **THE NUMBER OF WOMEN TAKING TO UK GOLF COURSES HAS MORE THAN TRIPLED SINCE THE OUTBREAK OF COVID-19.**
- **MORE THAN ONE-QUARTER OF ROUNDS OF GOLF IN THE UK IN 2022 WERE PLAYED BY WOMEN.**
- **GERMANY HAS THE MOST REGISTERED FEMALE GOLFERS IN EUROPE, WITH 221K, FOLLOWED BY SWEDEN (130K), NETHERLANDS (126K) AND FRANCE (98K).**

# **RISE IN WOMEN'S GOLF**

**2022 WAS A MOMENTOUS YEAR FOR WOMEN'S GOLF IN EUROPE, WITH THE WOMEN'S SCOTTISH OPEN (WSO) A STANDOUT EVENT.**

- **WSO ATTRACTED 10K ATTENDEES IN 2022, WITH MORE THAN HALF (52%) ATTENDING THE EVENT FOR THE FIRST TIME.**
- **WSO SOCIAL MEDIA VIEWS GREW 563% YEAR-ON-YEAR.**
- **2022 SOCIAL MEDIA INTERACTIONS ON WSO CHANNELS OUTPERFORMED THE SPORTS INDUSTRY AVERAGE, WITH A 4.6% ENGAGEMENT RATE ON INSTAGRAM (VERSUS 2.3% SPORTS INDUSTRY AVERAGE) AND A 1.6% ENGAGEMENT RATE ON TWITTER (VERSUS 0.8% SPORTS INDUSTRY AVERAGE).**
- **199% INCREASE IN DEDICATED TV COVERAGE VERSUS 2020.**
- **18% INCREASE IN BROADCAST DISTRIBUTION VERSUS 2020.**

# WOMEN'S SPORT

**WOMEN'S SPORTS SHOULD BE HIGHLIGHTED MORE BY THE MEDIA**

**42% OF GOLF FANS**

**VS 36% OF GENERAL SPORTS FANS**

**WOMEN'S SPORTS IS EXCITING TO WATCH**

**40% OF GOLF FANS**

**VS 31% OF GENERAL SPORTS FANS**

**WOMEN'S SPORTS SHOULD GET MORE INVESTMENT**

**42% OF GOLF FANS**

**VS 32% OF GENERAL SPORTS FANS**

**I FOLLOW A FEMALE ATHLETE OR TEAM ON SOCIAL MEDIA**

**19% OF GOLF FANS**

**VS 11% OF GENERAL SPORTS FANS**

## GOLF FANS IN EUROPE

# GROWTH IN GOLF

THE SPORT CONTINUES TO BOOM IN EUROPE.

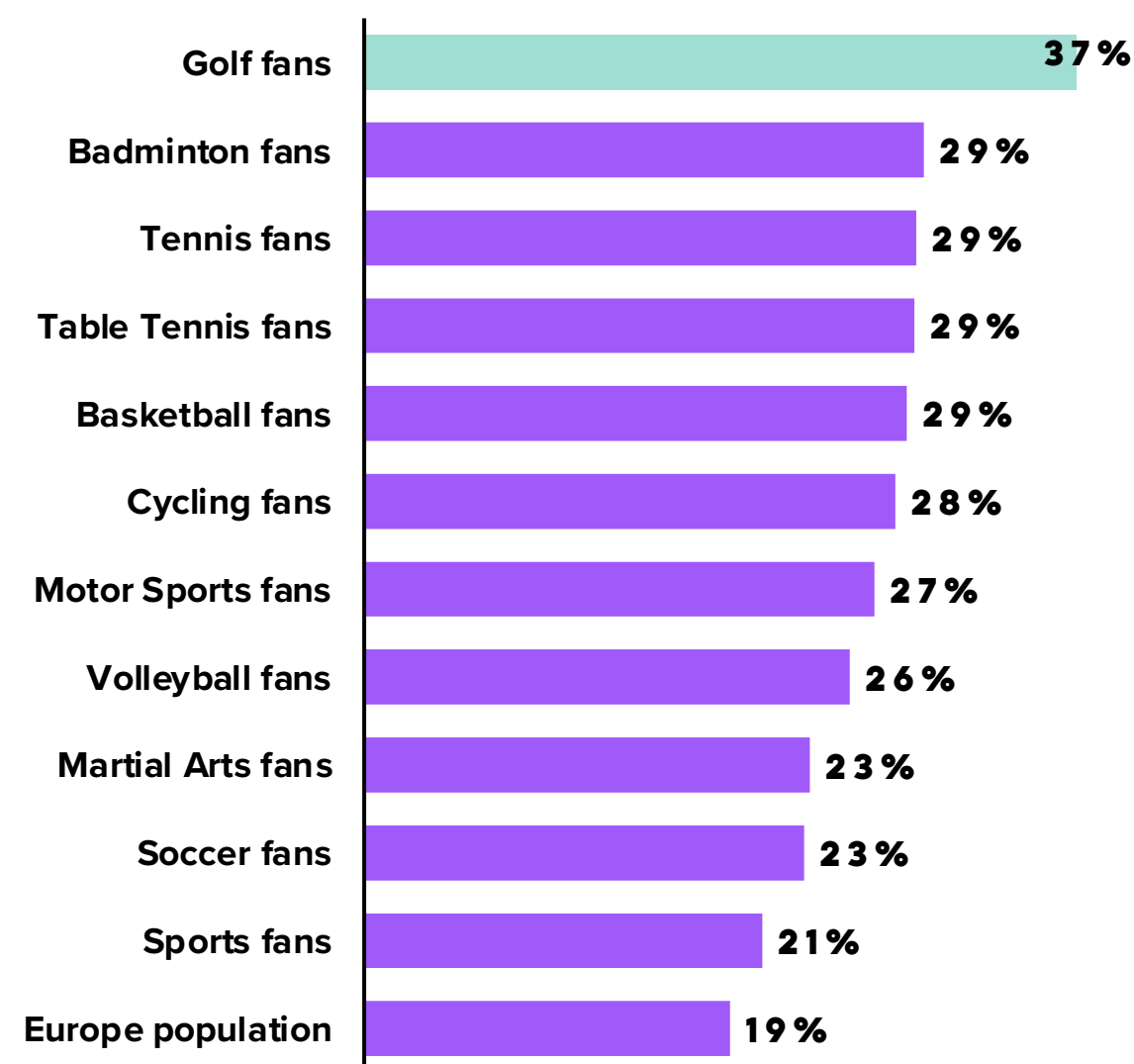
- **73% OF NATIONAL FEDERATIONS IN EUROPE RECORDED AN INCREASE IN REGISTERED GOLFERS FROM 2019 TO 2021. ENGLAND AND SWEDEN REGISTERED THE GREATEST GROWTH IN NEW GOLFERS, WITH 64K AND 55K, RESPECTIVELY.**
- **IN THE UNITED KINGDOM, THE NUMBER OF ROUNDS PLAYED IN THE FIRST NINE MONTHS OF 2022 WAS 81% HIGHER THAN IN 2019, WITH 16.6M ROUNDS OF GOLF BOOKED.**

# ATTRACTING THE YOUNGER GENERATION

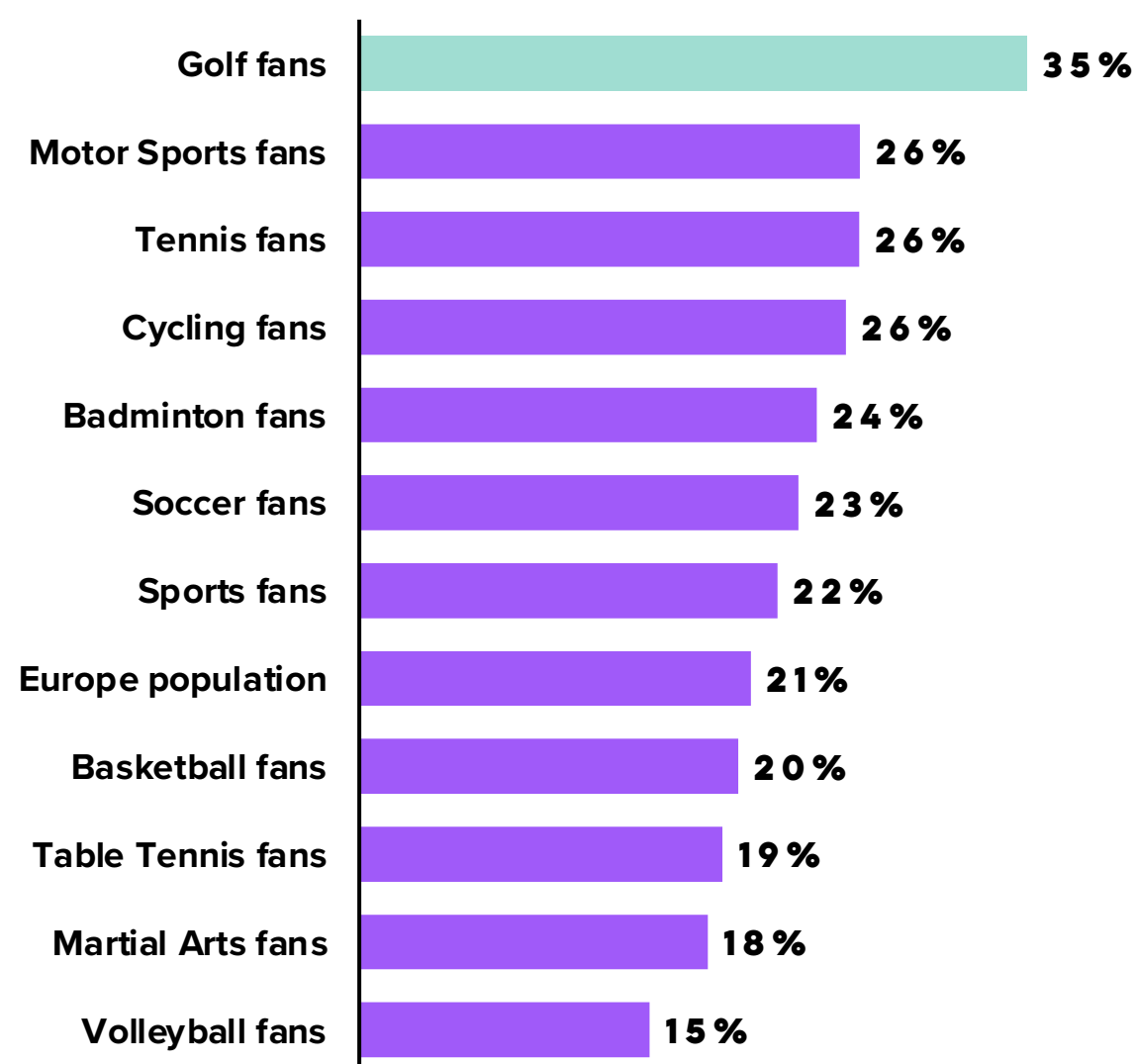
- **18-35 WAS THE LARGEST AND FASTEST-GROWING AGE GROUP IN THE UK, BOOKING 28% OF ROUNDS IN 2022.**
- **JUNIOR GOLFERS ACROSS EUROPE INCREASED BY OVER 43,000 TO 350,000 IN 2022. SWEDEN (62K), ENGLAND (45K) AND GERMANY (41K) ARE THE TOP MARKETS FOR REGISTERED JUNIOR GOLFERS IN EUROPE.**

# INCOME, SOCIO-ECONOMICS & EDUCATION

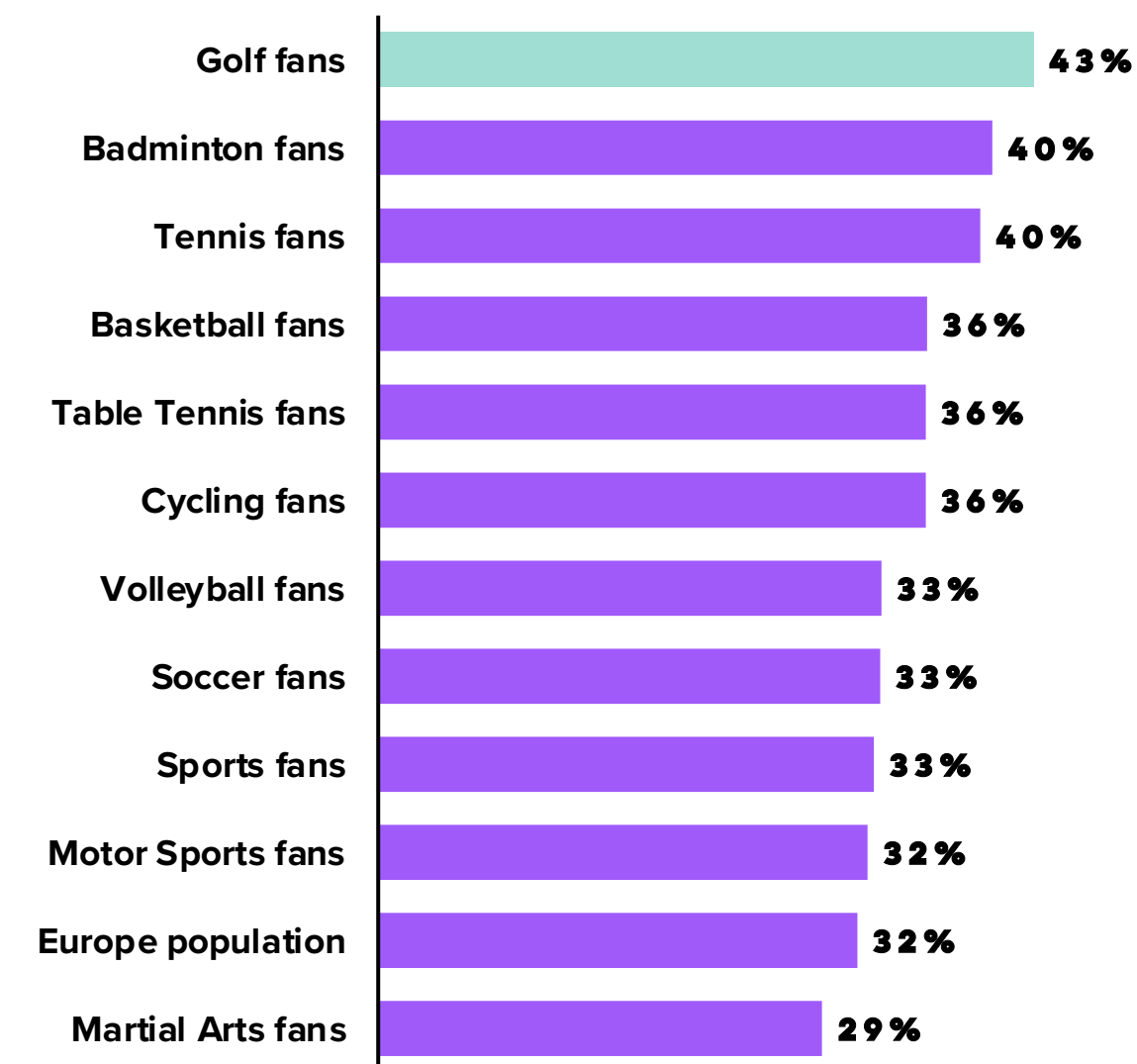
**% OF FANS IN THE HIGHEST SOCIO-ECONOMIC GRAND**



**% OF FANS IN TOP GLOBAL PURCHASING POWER QUINTILE**



**% OF FANS WITH A UNIVERSITY OR POSTGRADUATE DEGREE**

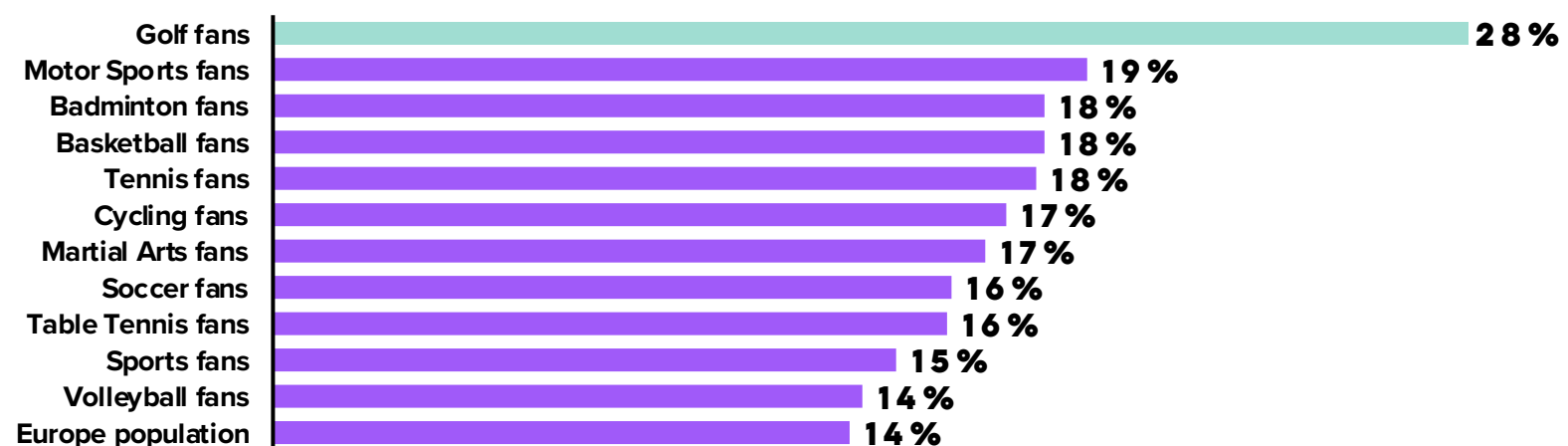




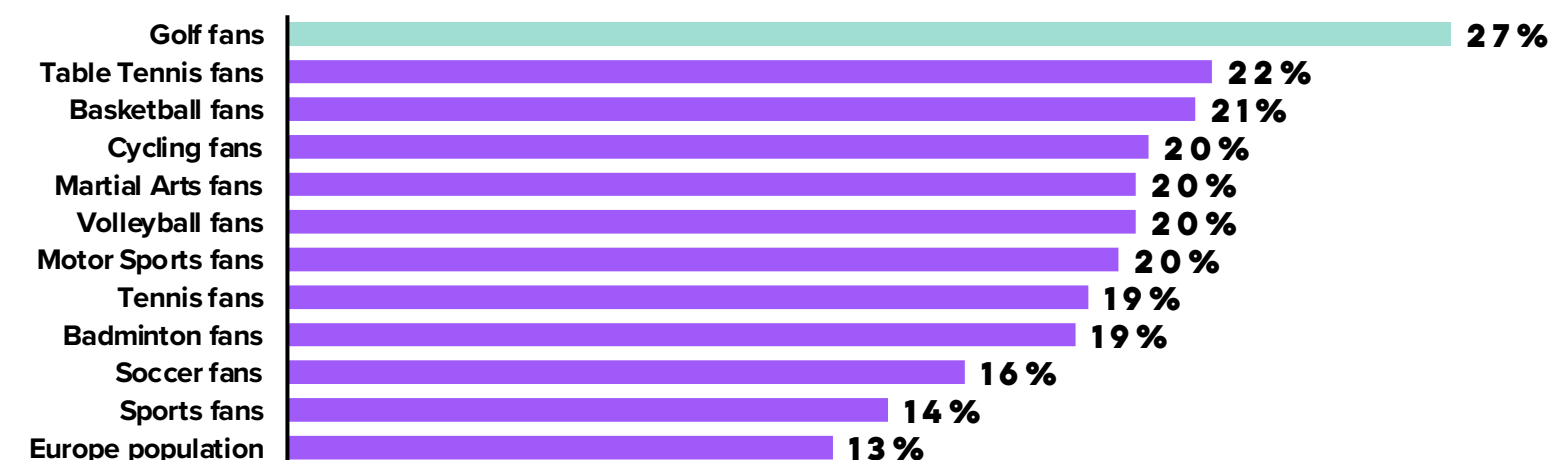
# ATTRACTIVE B2C AUDIENCE

THE ATTITUDES AND SPENDING HABITS OF GOLF FANS IN EUROPE ENSURE AN ATTRACTIVE B2C AUDIENCE FOR BRANDS TO TARGET.

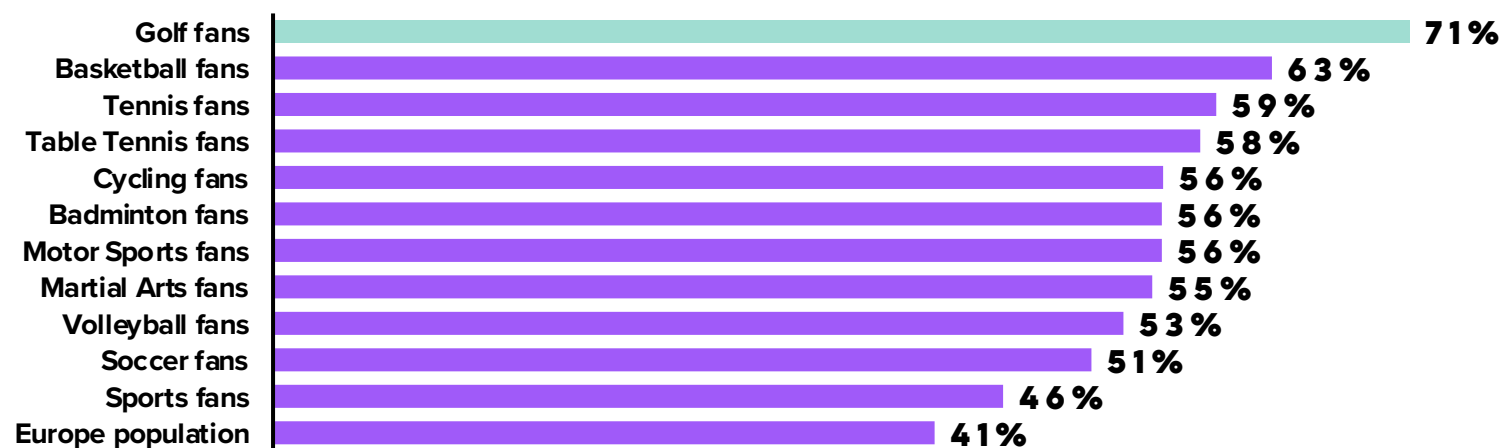
MY HOUSEHOLD OWNS A LUXURY CAR



I TEND TO BUY THE PREMIUM VERSION OF PRODUCTS



I PURCHASED LUXURY/DESIGNER CLOTHES IN LAST 12 MONTHS



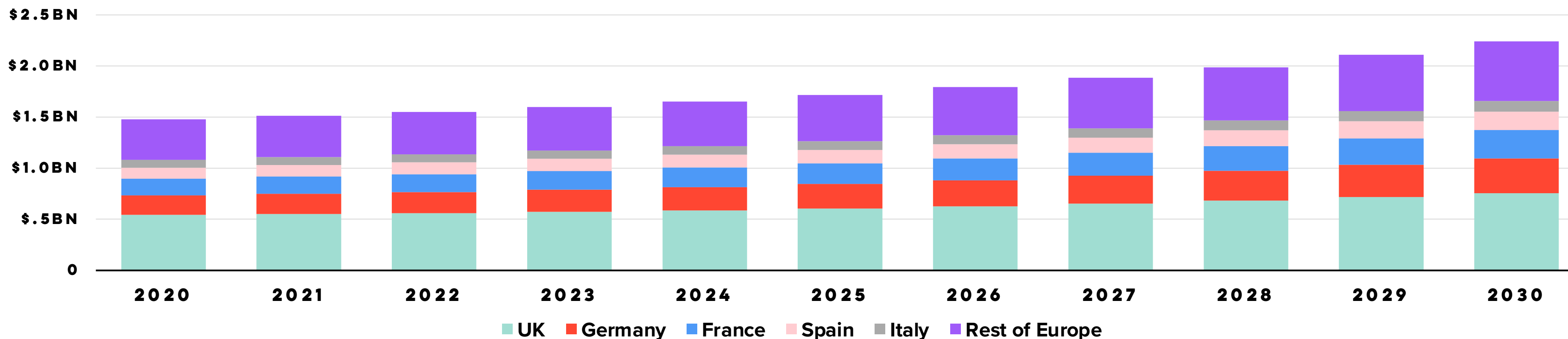
I AM PLANNING TO TRAVEL IN THE NEXT 3-6 MONTHS



# GOLF EQUIPMENT MARKET IN EUROPE

THE MARKET FOR GOLF EQUIPMENT IN EUROPE IS PROJECTED TO INCREASE AT A CAGR OF 4.02% BETWEEN 2020 AND 2030, EXCEEDING THE CAGR OF 2.87% IN NORTH AMERICA ACROSS THE SAME PERIOD AND REFLECTING THE GROWING INTEREST IN THE GAME IN EUROPE.

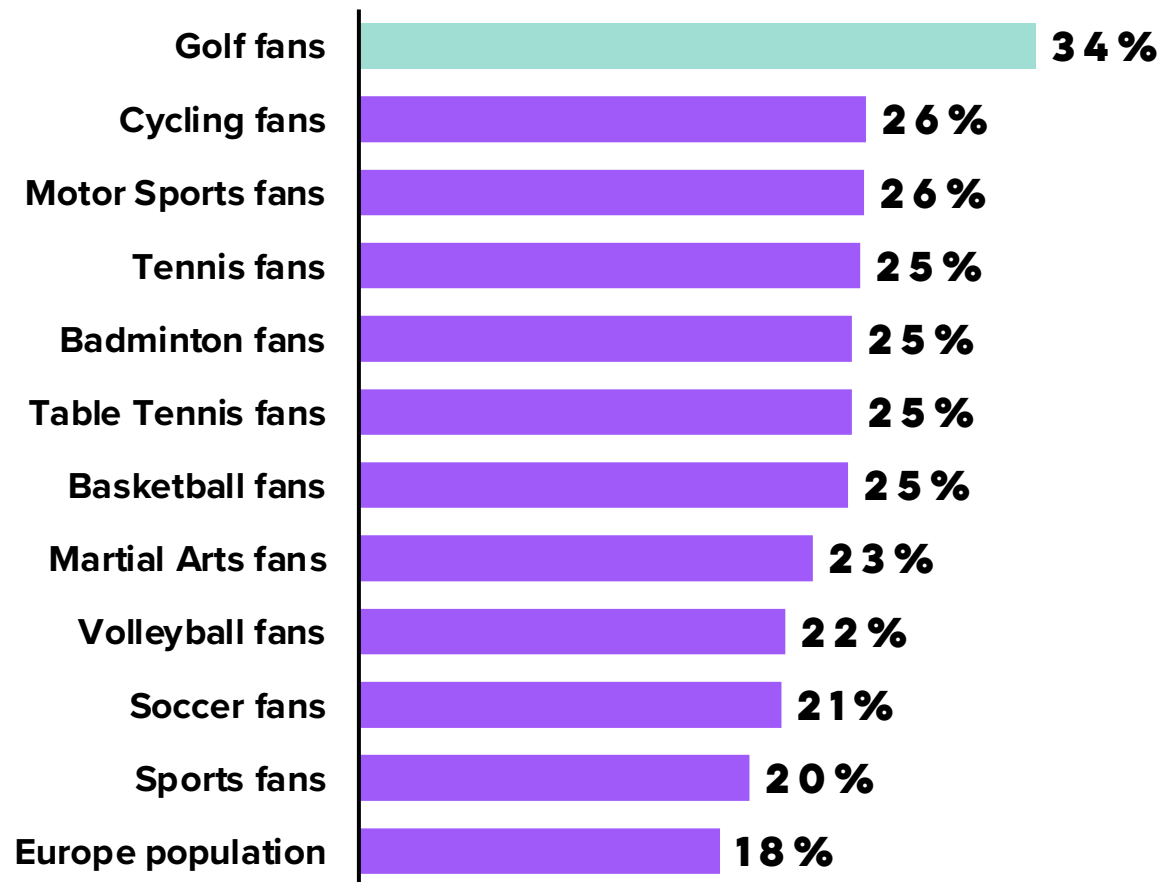
GOLF EQUIPMENT SALES REVENUE IN EUROPE 2020-2030



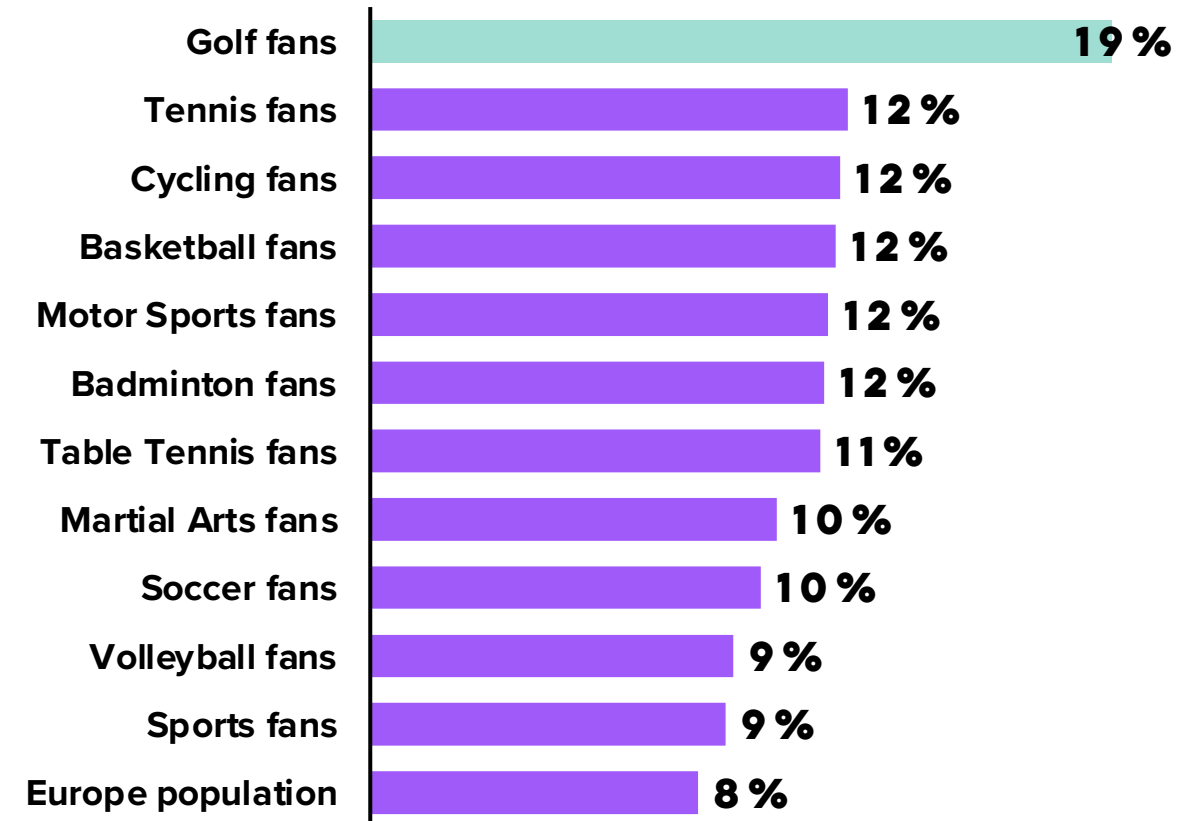
# ATTRACTIVE B2B AUDIENCE

GOLF FANS ARE ALSO MORE LIKELY TO BE IN SENIOR, DECISION-MAKING ROLES IN THEIR CAREERS, ENSURING AN ATTRACTIVE B2B AUDIENCE.

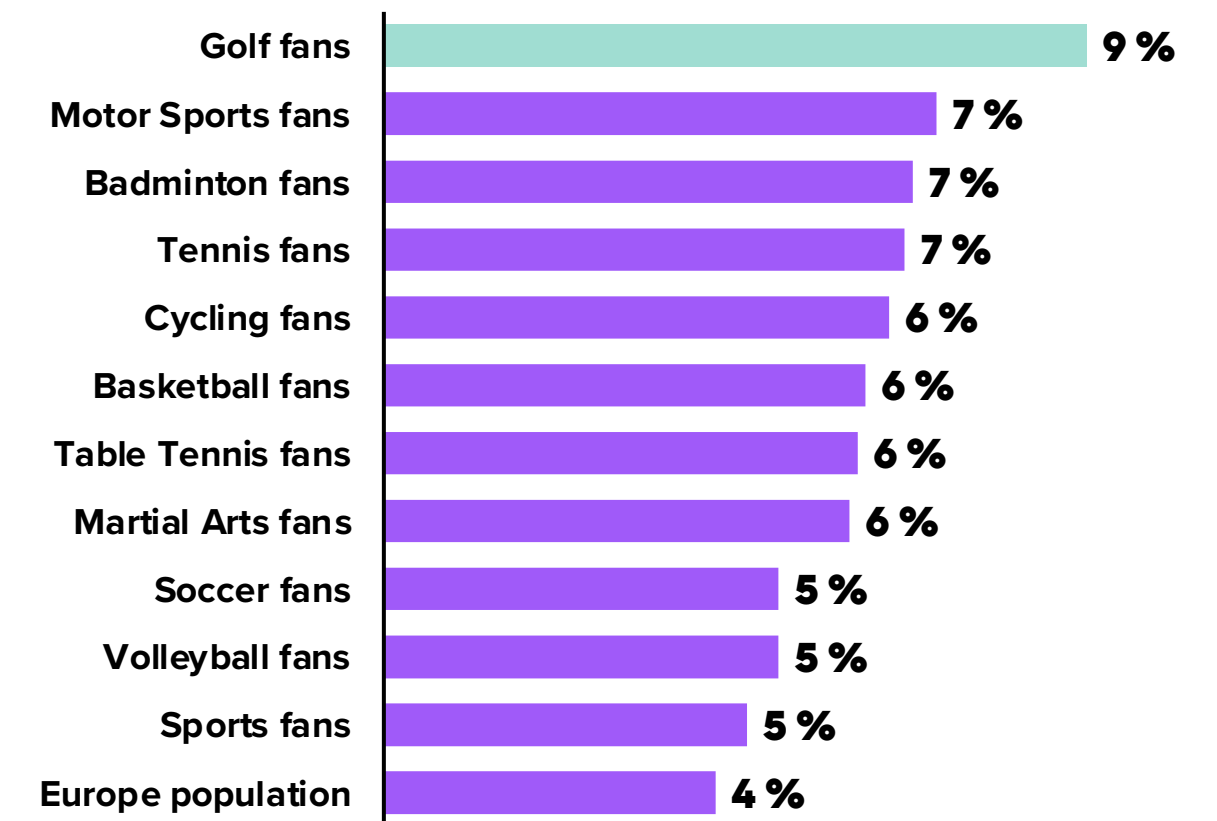
## DECISION-MAKERS AT WORK



## IN SENIOR MANAGEMENT OR LEADERSHIP ROLES



## PURCHASERS OF IT, TELECOMS OR TECHNOLOGY





# TRADITIONAL VALUES

GOLF FANS IN EUROPE HOLD TRADITIONAL VALUES, INCLUDING FAMILY, SECURITY AND COMMUNITY.





# ...YET INNOVATIVE



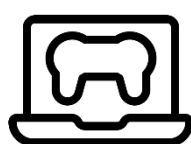
**21% OF GOLF FANS HAVE INVESTMENTS IN CRYPTOCURRENCIES** VS 11% OF GENERAL SPORTS FANS



**14% OF GOLF FANS PURCHASE DIGITAL COLLECTIBLES** VS 4% OF GENERAL SPORTS FANS



**16% OF GOLF FANS ACCESS CONTENT IN THE METAVERSE** VS 5% OF GENERAL SPORTS FANS



**23% OF GOLF FANS ARE INTERESTED IN ESPORTS** VS 11% OF GENERAL SPORTS FANS



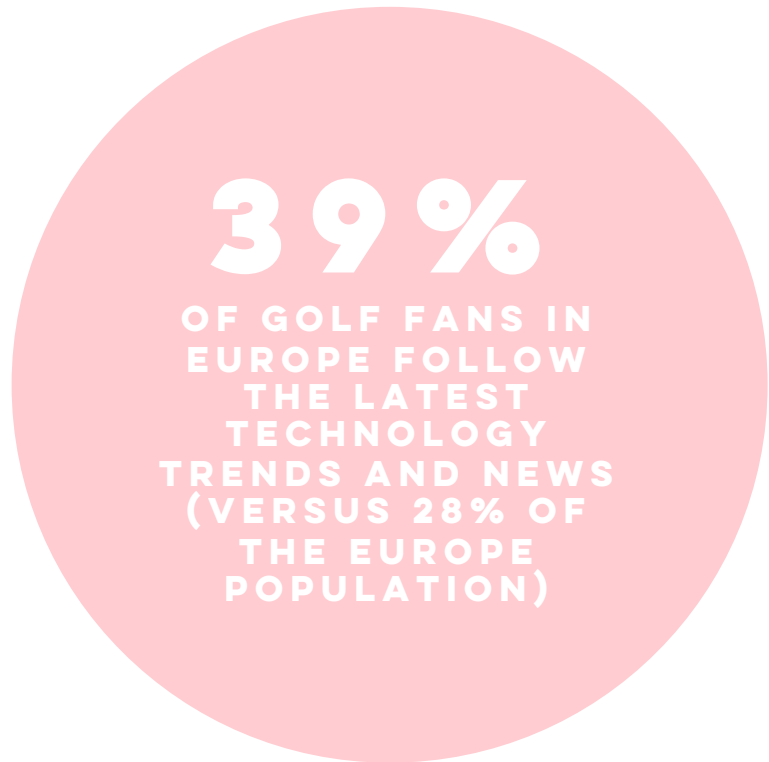
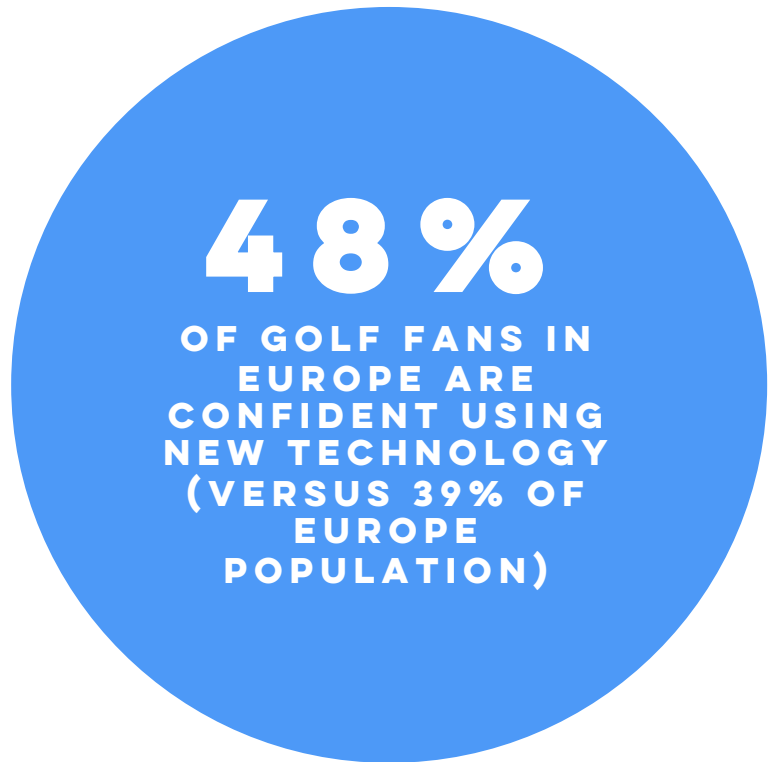
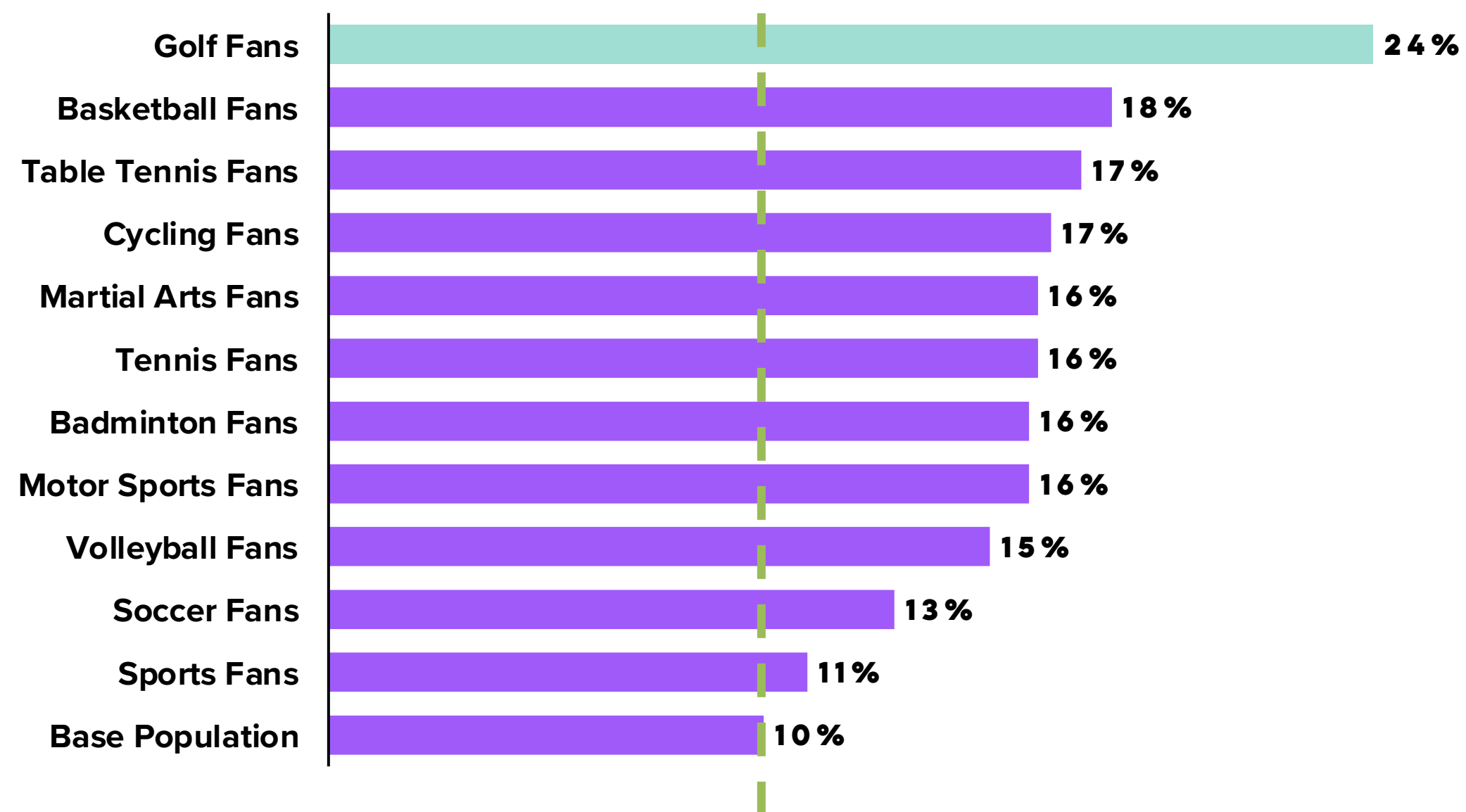
**45% OF GOLF FANS WANT BRANDS TO BE INNOVATIVE** VS 43% OF GENERAL SPORTS FANS

## GOLF FANS IN EUROPE

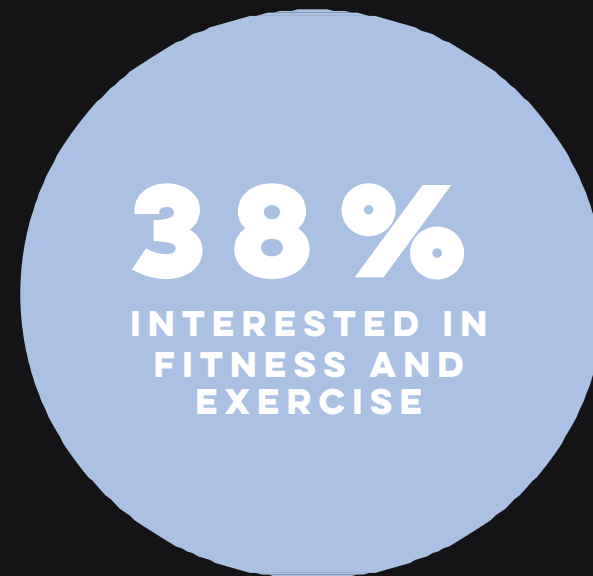
# TECH SAVVY

GOLF FANS IN EUROPE ARE TECH SAVVY, MORE THAN TWICE AS LIKELY AS THE AVERAGE SPORTS FAN TO BUY TECH PRODUCTS AS SOON AS THEY ARE AVAILABLE

### I BUY NEW TECH PRODUCTS AS SOON AS THEY ARE AVAILABLE



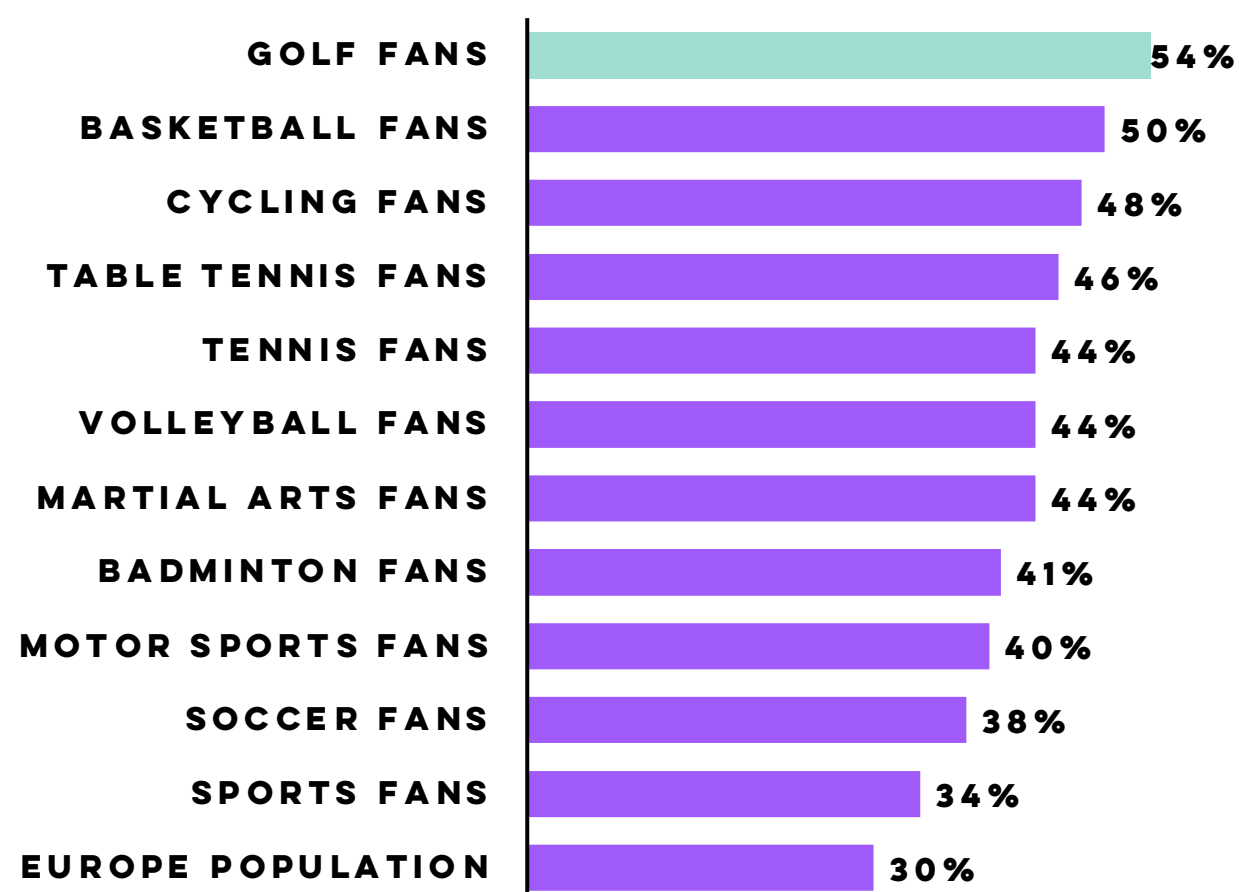
# HEALTH CONSCIOUS



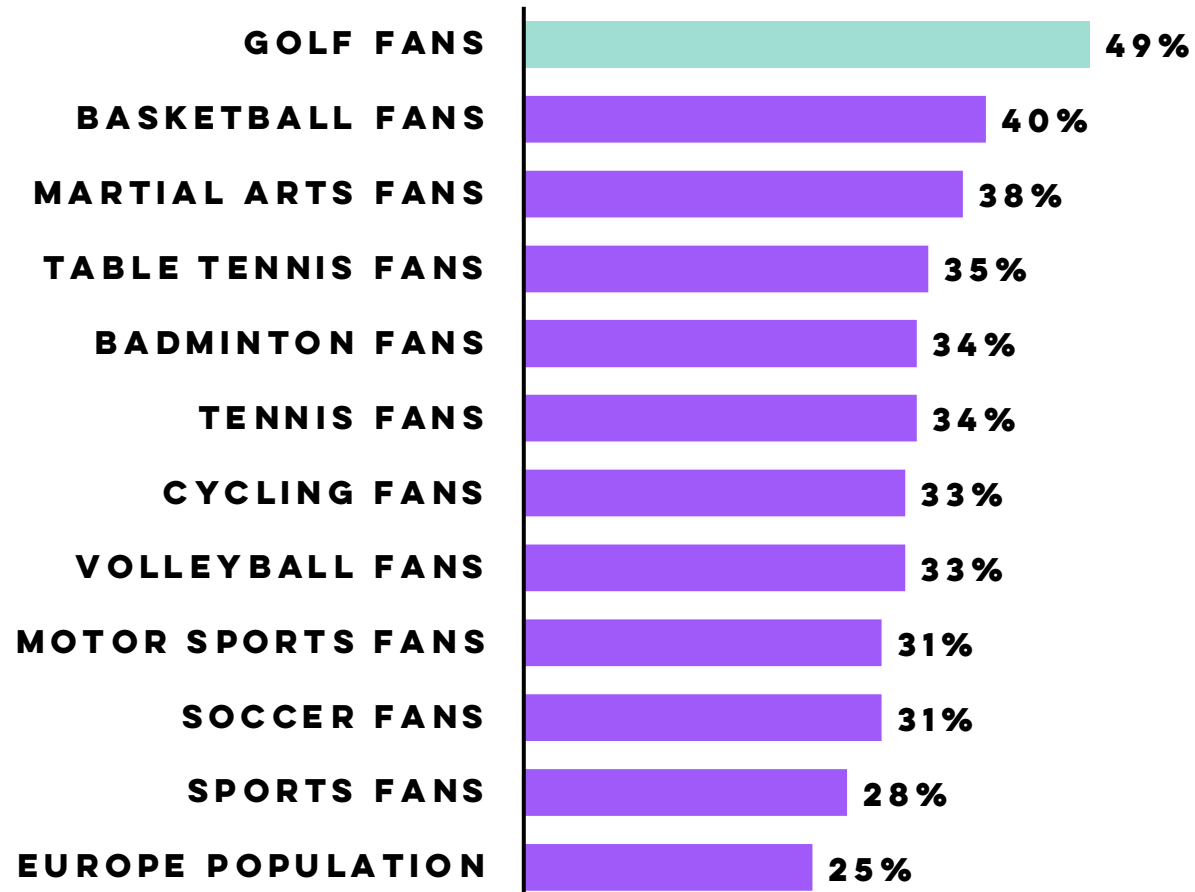
# ACTIVE LIFESTYLE

HEALTH-CONSCIOUS GOLF FANS ARE MORE LIKELY TO RUN, GET TO THE GYM OR GET INVOLVED WITH ANY FORM OF EXERCISE EVERY WEEK

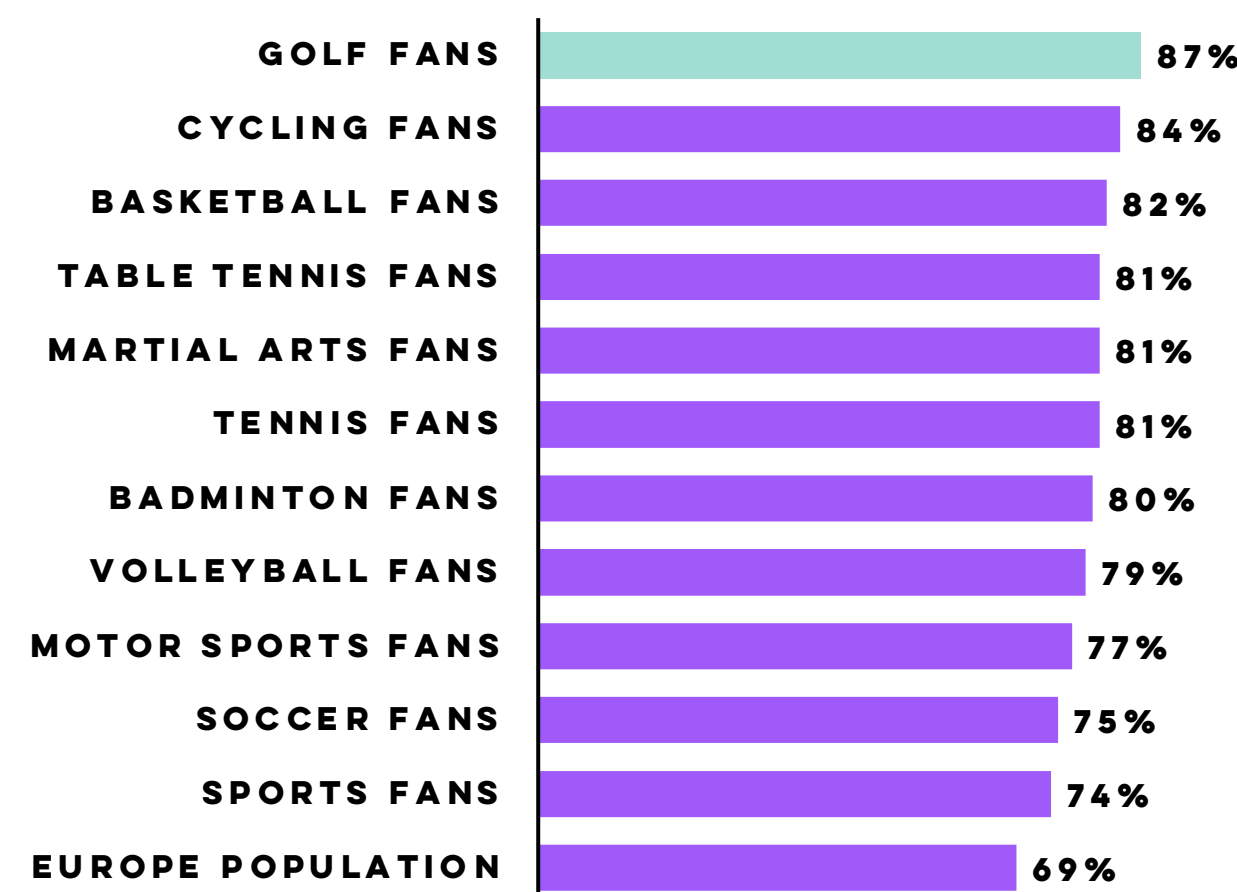
RUN AT LEAST ONCE PER WEEK



VISIT THE GYM AT LEAST ONCE PER WEEK



EXERCISE AT LEAST ONCE PER WEEK

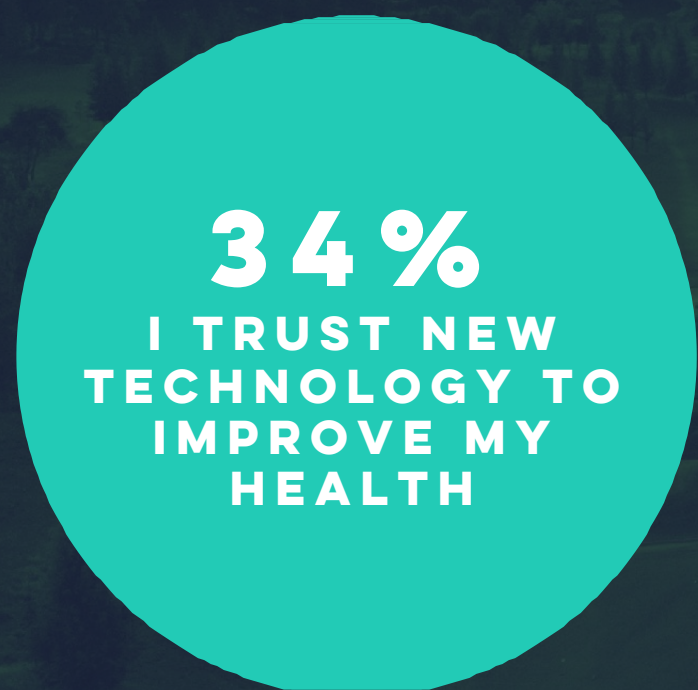




GOLF FANS IN EUROPE

# HEALTH TECH

GOLF FANS IN EUROPE TURN TO TECHNOLOGY, DIGITAL PRODUCTS AND THE INTERNET TO STAY HEALTHY AND ACTIVE.



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# ROLE OF SPORTS IN SOCIETY

**SPORTS ORGANISATIONS AND ATHLETES SHOULD TAKE A STAND AGAINST SOCIAL ISSUES**



**SPORTS ORGANISATIONS AND ATHLETES SHOULD SUPPORT LOCAL COMMUNITIES**



**SPORTS BRING PEOPLE FROM DIFFERENT BACKGROUNDS TOGETHER**



■ **SPORTS FANS**  
■ **GOLF FANS**



# SUSTAINABILITY

GOLF FANS IN EUROPE ARE PASSIONATE ABOUT SUSTAINABILITY, PLACING IMPORTANCE ON RECYCLING AND HELPING THE ENVIRONMENT.





GOLF FANS IN EUROPE

# SPONSORSHIP AWARENESS

**87%**

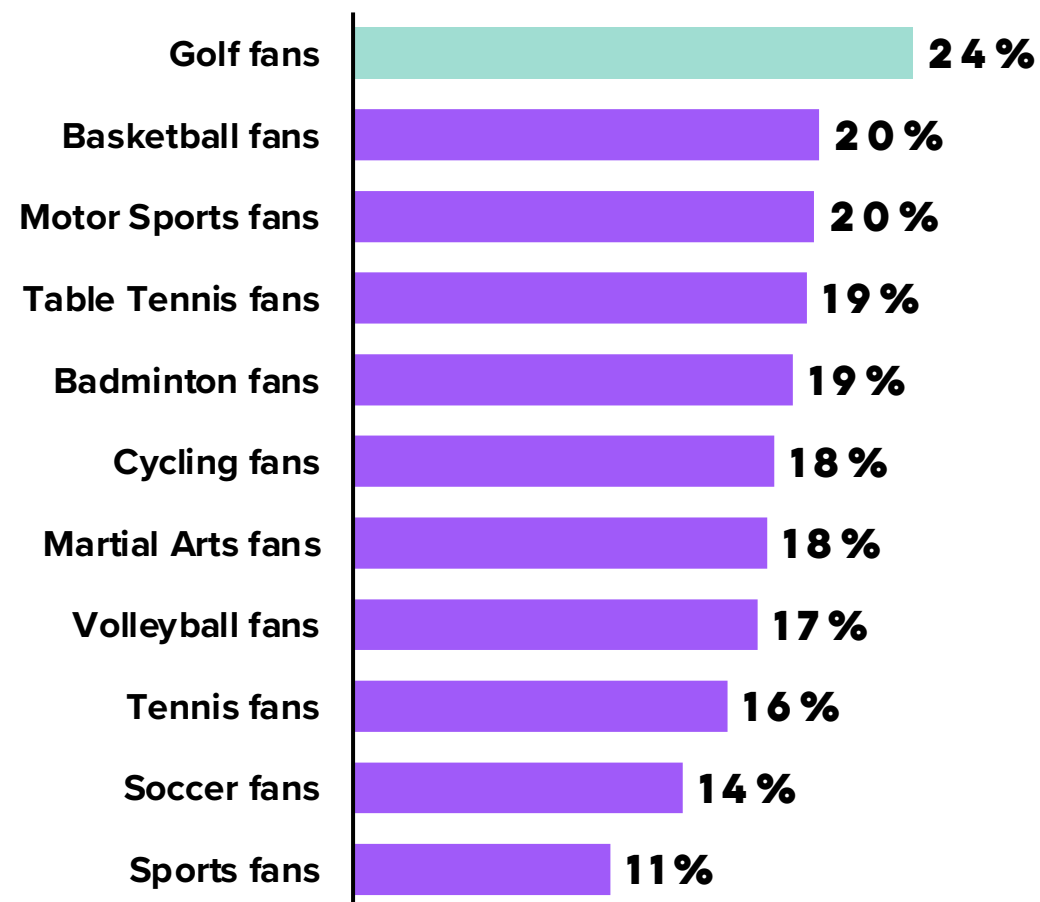
**OF GOLF FANS  
NOTICE SPONSORS  
WHEN WATCHING OR  
ATTENDING SPORTS  
EVENTS, 13% HIGHER  
THAN GENERAL  
SPORTS FANS**

# SPONSORSHIP IMPACT

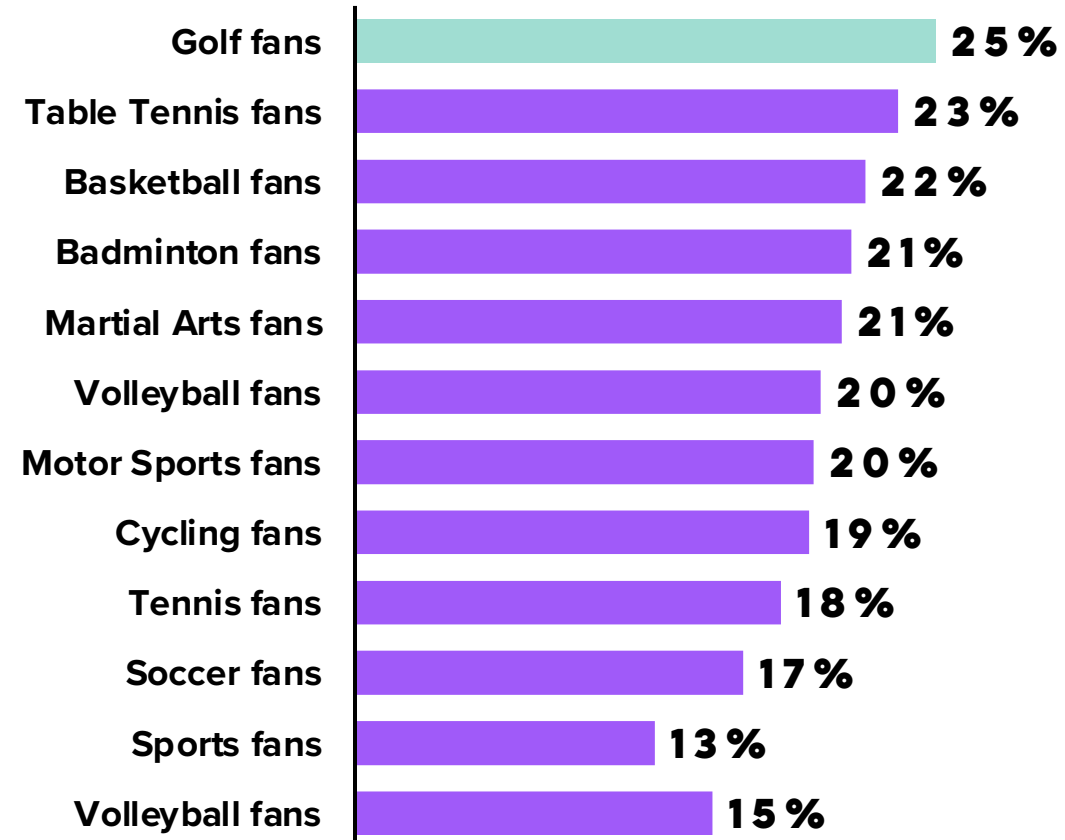
GOLF FANS ARE MORE LIKELY TO BE IMPACTED BY AND RESPOND TO SPONSORSHIP - SPONSORSHIP MAKES GOLF FANS MORE LIKELY TO RESEARCH, CONSIDER, ENGAGE WITH AND PURCHASE A BRAND.

## SPONSORSHIP MAKES ME MORE LIKELY TO...

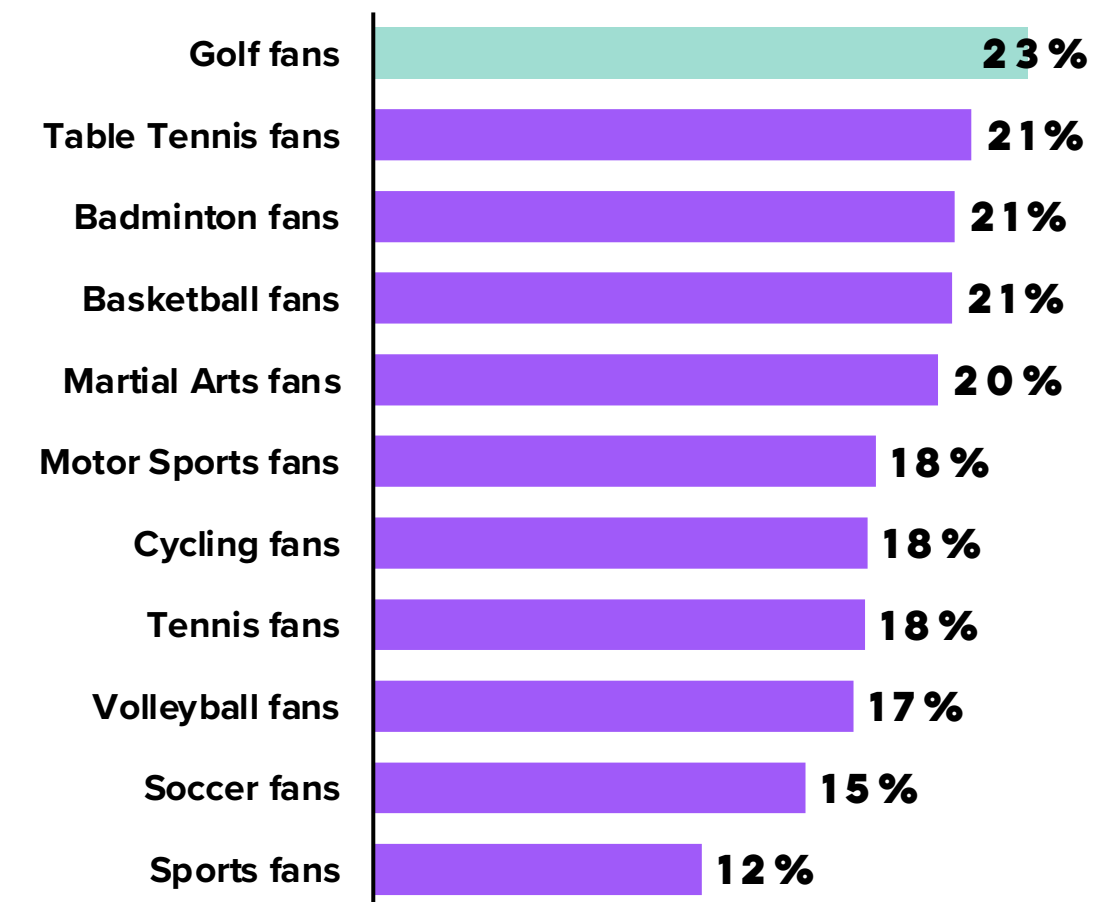
*...ENGAGE WITH THE BRAND*



*...CONSIDER THE BRAND OVER COMPETITORS*



*...PURCHASE THE BRAND*



**G O L F F A N S I N**  
**E U R O P E**