

Golf for All

A research project from The PGA
in partnership with Ipsos



An introduction to Golf for All

This research aims to provide an understanding across a broad audience of those with any level of interest in golf.

The PGA commissioned Ipsos to conduct surveys, both offline and online, to understand the size of the golfing landscape within the UK and Ireland.

The following report looks at some of the key groups of golfers, the many different formats they play on and off course (inc. driving ranges, simulators and adventure golf) and their attitudes towards the game.

The report also looks at how The PGA and the golf industry can look to engage more people to play golf, in all its forms, and enjoy the many benefits that it brings.

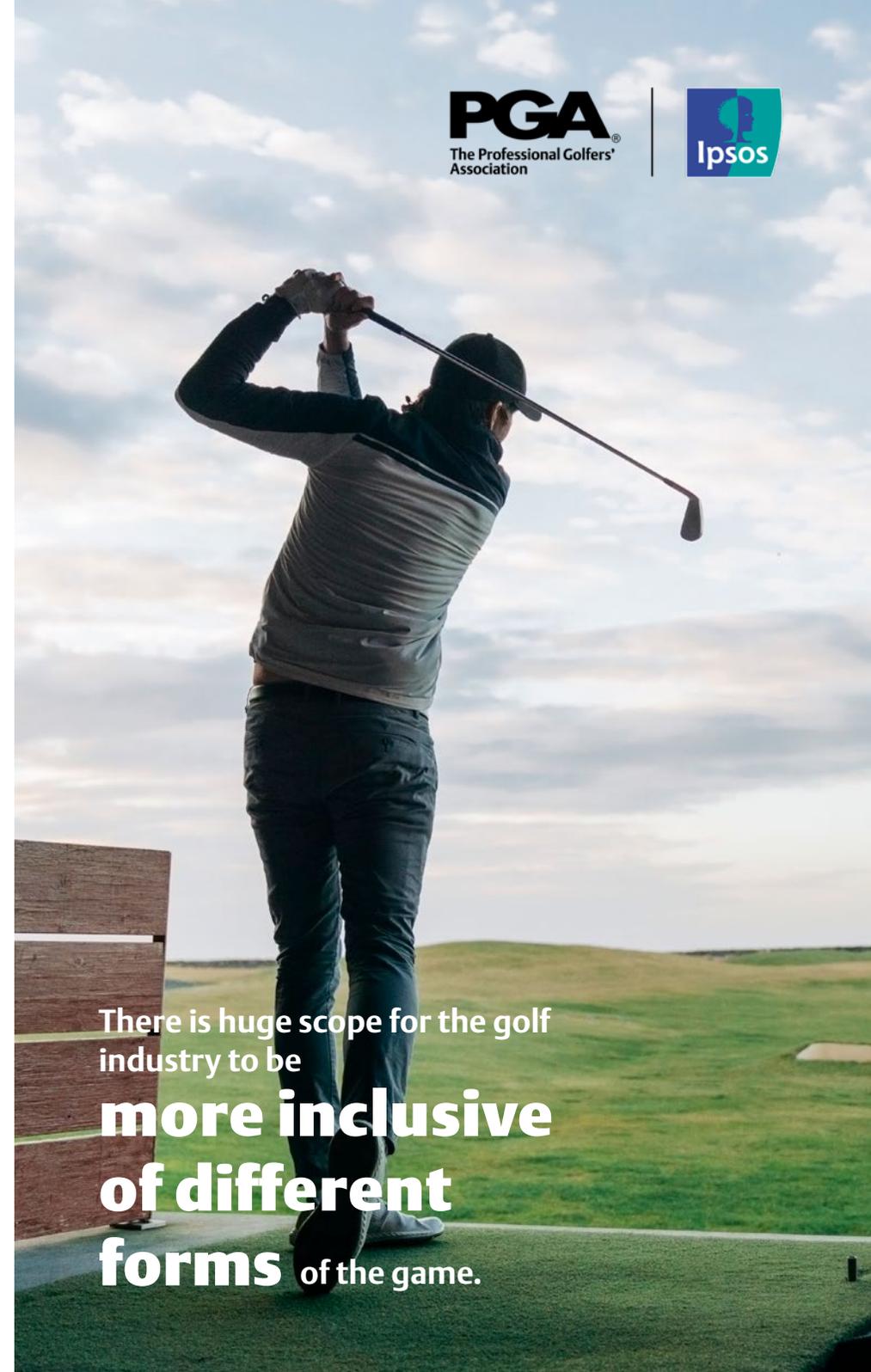
Less than

1 in 4

adults who engage with golf in the UK and Ireland play full or short course golf

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There is huge scope for the golf industry to be

more inclusive of different forms of the game.



**Golf has changed.
It's not what you
thought it was.**

55.7m

Population of UK and Ireland

22.4m

All of golf

Media interest only

6.1m

16.3m

Play any golf

Playing off-course only

11.4m

Playing on-course

4.9m

Across the UK and Ireland

40%

of the adult population
play golf or consume golf
media at least once a year

What is the opportunity?

4.9m

On-course golf

Adults who are playing either full or short course golf

16.3m

Any form of golf

Adults who are playing any form of the game

22.4m

All of golf

The 40% of adults who are either playing or consuming golf media at least once per year

55.7m

Potential Addressable Market (PAM)

Adult population of the UK & Ireland

2 in 3



of all those who play golf at least once a year in the UK and Ireland play a **'non-traditional'** form of the game (not including full/short course golf)





12.6m

**Adventure
Golf**

the most popular
form of any type
of golf

**Across all forms of the game
outside of full/short course
golf, millions across the UK
and Ireland enjoy playing golf.**

4.8m

Driving
Range
Golfers

3.9m

Pitch
and Putt
Golfers

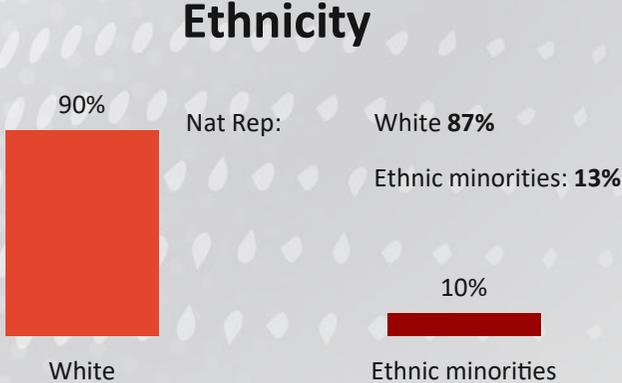
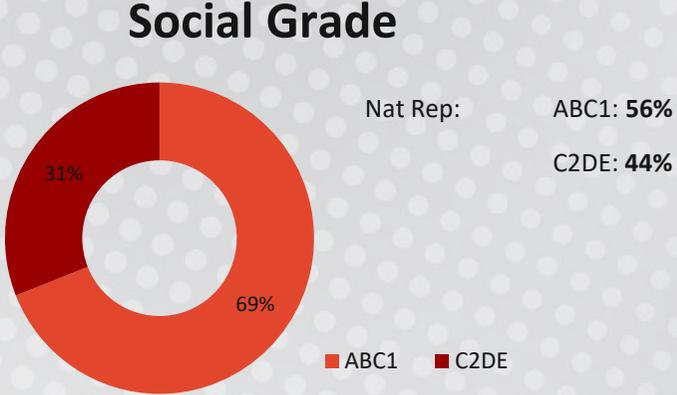
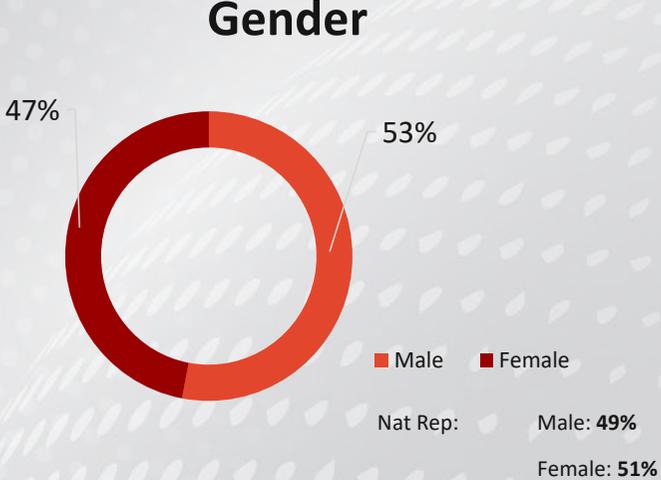
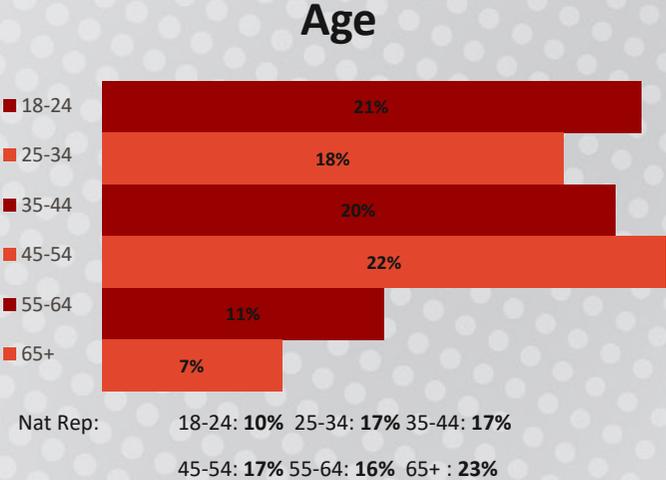
2.1m

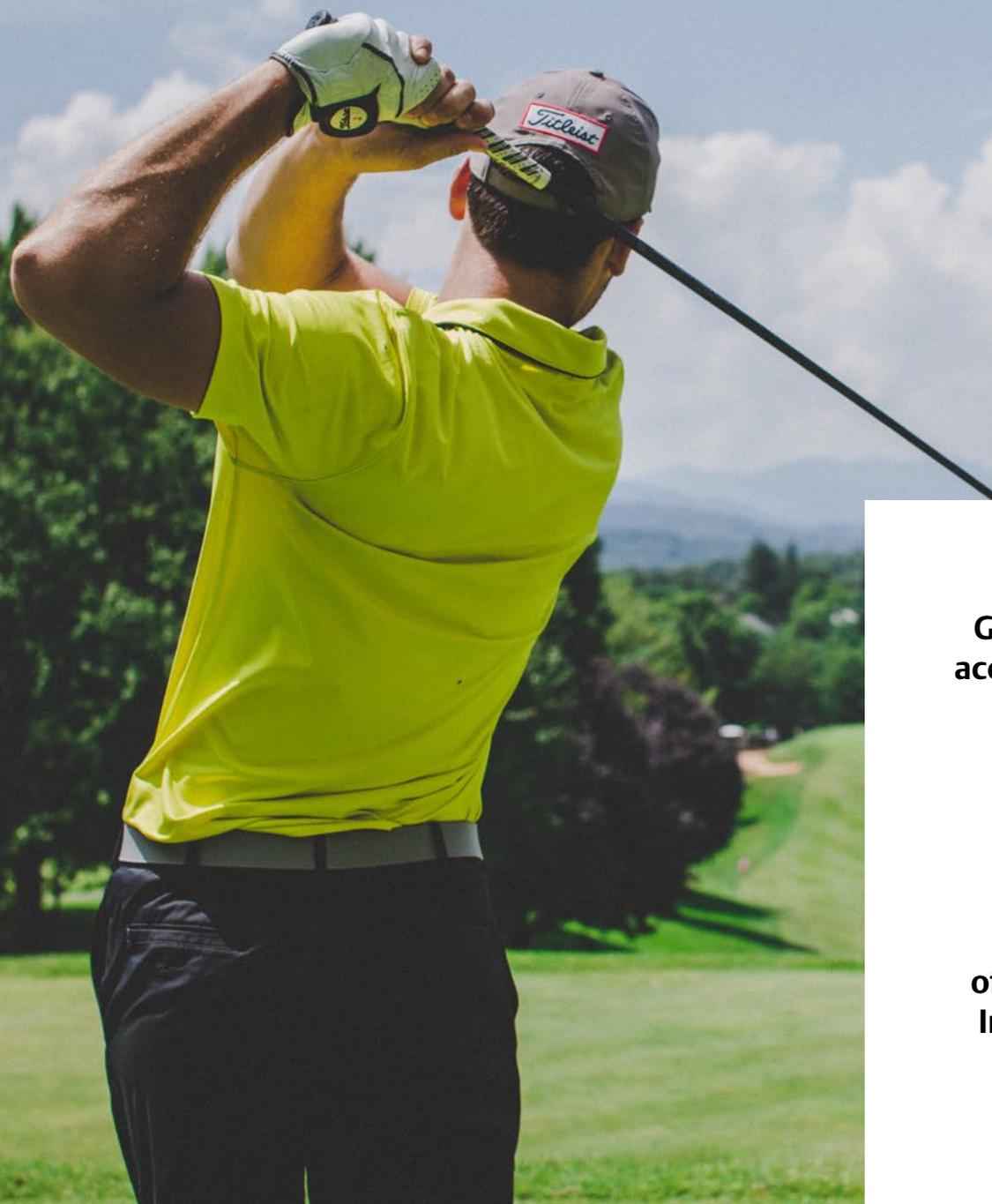
Simulator
Golfers

When you look at the wider golf sphere, beyond on-course players, there are more women, young people and those from ethnic minorities.

All of golf (excluding on-course players and media interest only)

When looking at those who **do not** play on a full/short course and excluding those with only media interest, the profile is markedly different. A golfer (excl. full/short golf) is just as likely to be female as male and is somewhat more balanced vs. the UK and Ireland population in Social Grade and Ethnicity.





Golfers who play 'on-course'
account for **c.4.9m** adults (18+)
in the UK and Ireland.

This means that

9%

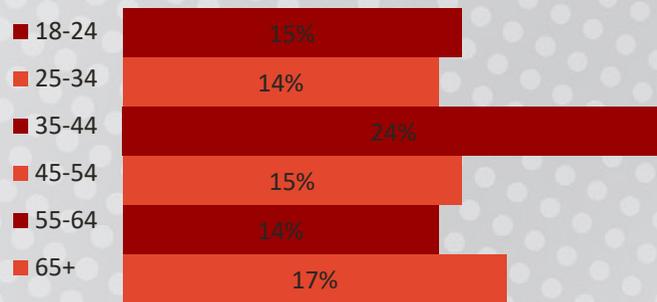
of adults (18+) in the UK and
Ireland play golf on a full or
short course.

The profile of on-course golfers is what may be expected of a 'traditional golfer'; white, male and ABC1

Full/short course golfer

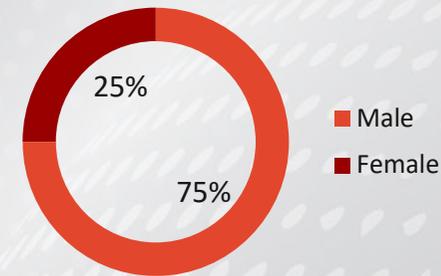
A typical golfer who plays on a full or short course is more likely to be a younger/middle aged Male. This group are much more likely to be big golf fans or watch, follow and keep up to date with the game. This group mostly play on a full or short course at least once every 2-3 months.

Age



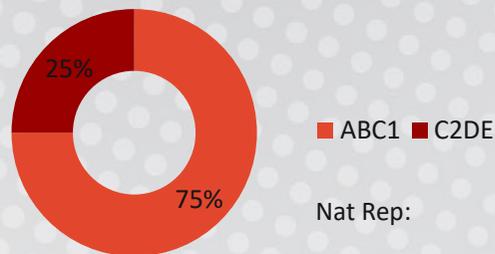
Nat Rep: 18-24: 10% 25-34: 17% 35-44: 17%
45-54: 17% 55-64: 16% 65+ : 23%

Gender



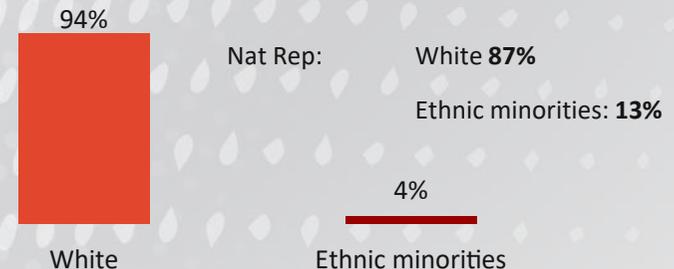
Nat Rep: Male: 49%
Female: 51%

Social Grade



Nat Rep: ABC1: 56%
C2DE: 44%

Ethnicity



Nat Rep: White 87%
Ethnic minorities: 13%



There is a huge opportunity for golf to **engage the wider golf audience** more regularly, across all different forms of golf, **diversifying the fan base** and encouraging a wider audience to see themselves as golfers.

However, off-course
golfers don't feel like
they are a golfer...yet.

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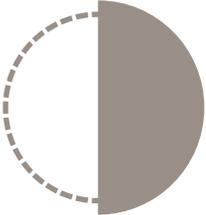
70%

of 'all those who play golf' do not see themselves as golfers.

All golfers need to be recognised, valued and celebrated!

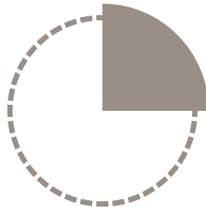
What can be done to encourage more people to **feel more associated** with the game?

Full/short course golfers are **significantly more likely to consider themselves golfers** compared to those that play other forms of golf.



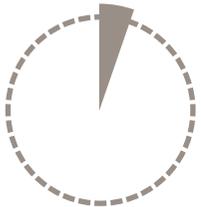
51%

of full/short course players (9/18 holes) consider themselves a golfer



25%

of people who play any golf consider themselves a golfer



2%

of people who play any golf excl. full/short course consider themselves a golfer





A perception issue?



Many do not see themselves as a golfer for a multitude of reasons...

Key reasons for not feeling like a golfer are not playing regularly enough, not feeling they are good enough and not playing 'on-course' golf.

"I have played a few times on a full golf course but have not played often"

"I don't feel I am good enough, am keen to learn"

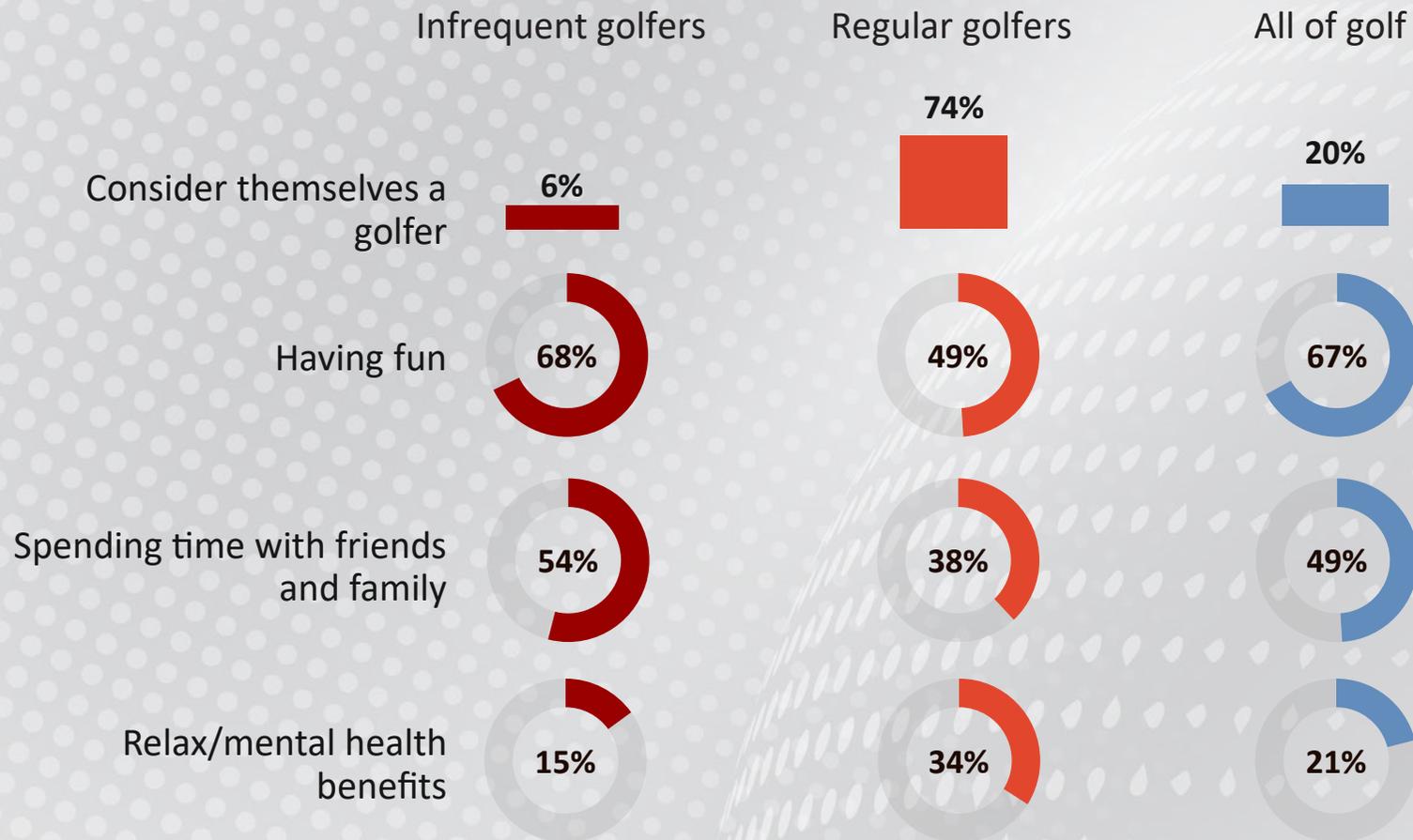
"I have never played traditional golf only mini golf"

"As I am only an occasional crazy golfer"

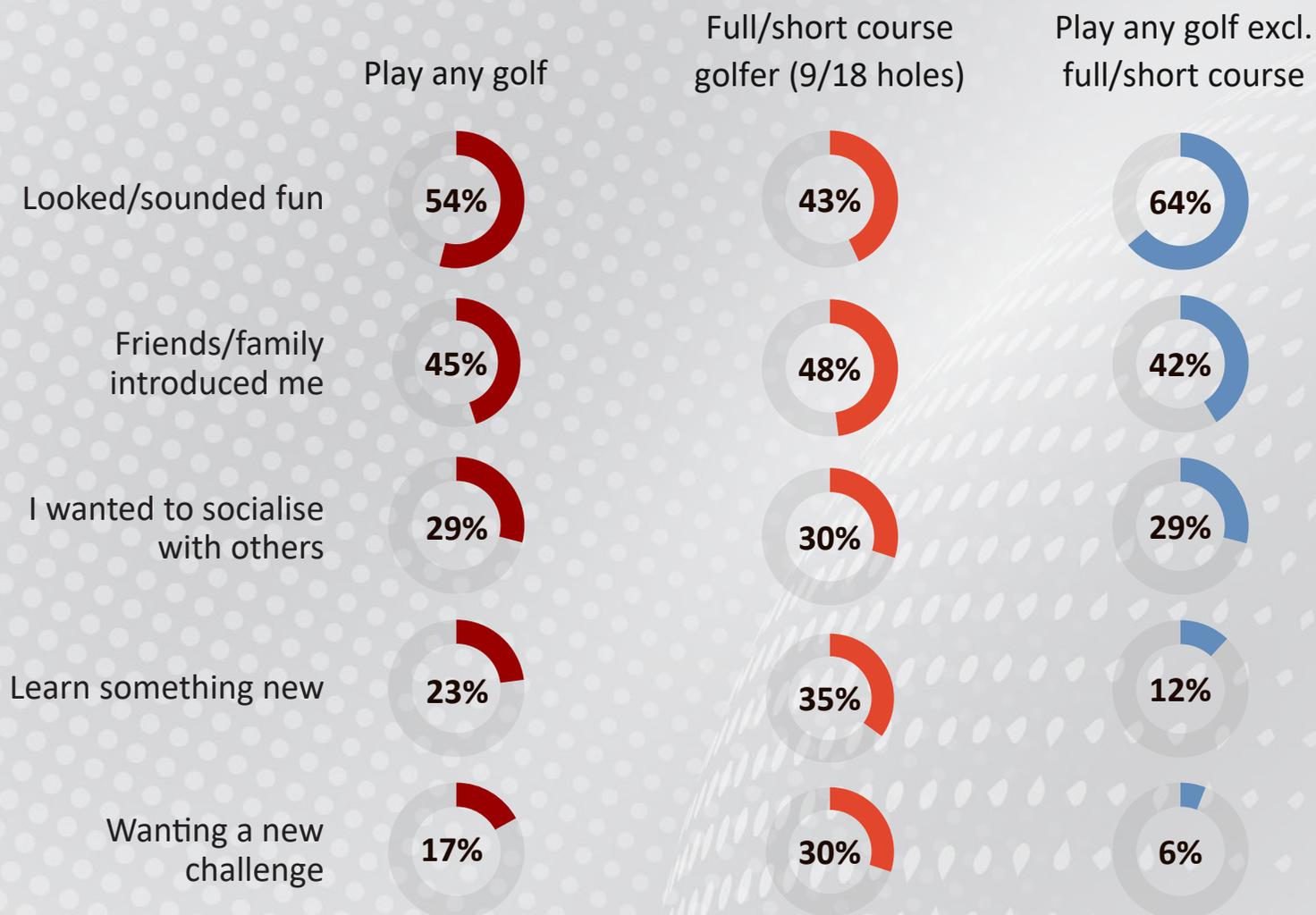
"It comes across as elitist"

Infrequent golfers are **least likely to see themselves as a golfer**. However, they are **much more likely to see golf as fun** and facilitating time with friends and family.

The benefits and appeal of golf are seen differently dependent on the frequency of those who play. Less frequent players are less likely to play golf to relax and for mental health benefits, showing the eclectic mix of why people love the game.



The **challenge of learning something new** drew in full/short course golfers whereas **having fun was a key aim** for those starting through other forms of the game.



For infrequent golfers, playing regularly on a full-length course is most likely to make them feel like a golfer.

19%

Purchasing your own golf equipment

21%

Golf lessons with a professional coach

27%

Playing regularly on a full length course

30%

Becoming a golf club member

Expanding markets, new opportunities, economic impact.

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47%

of 'all those who play golf' have **paid to play some form of golf** (inc. lessons) in the last three months.

Golf has a much wider range of those who **spend on the game** than just golfers.

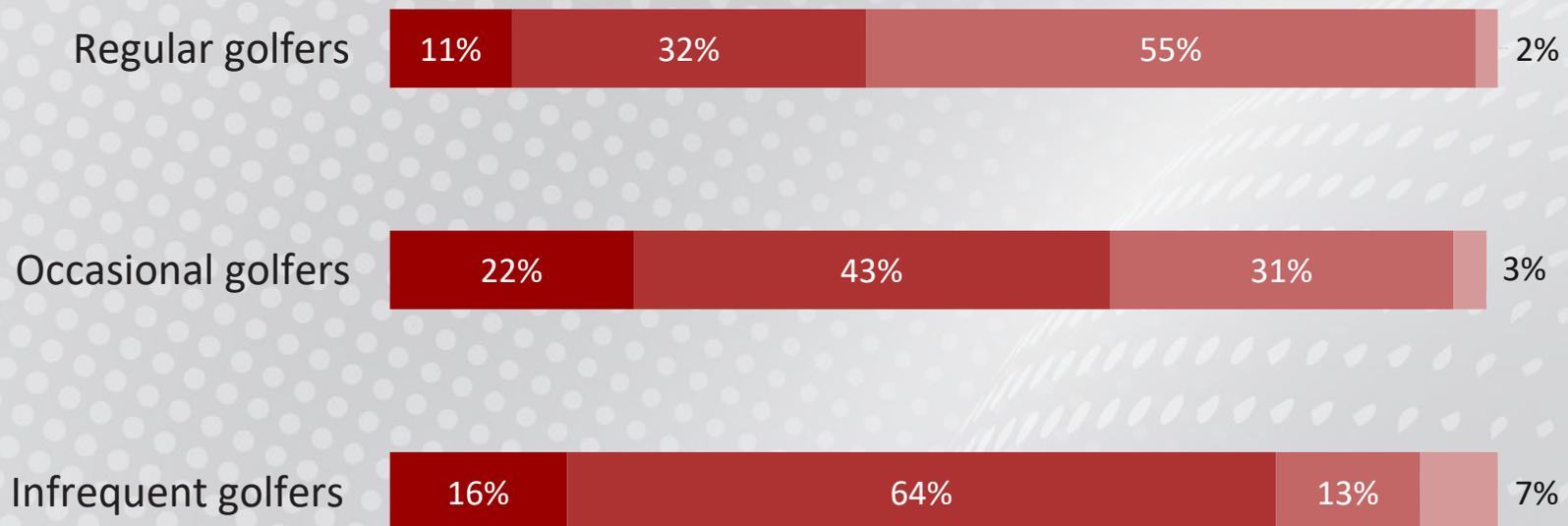
Those who consider themselves golfers are **much more likely to spend** on playing golf and equipment.

Perception is important to grow the game and encourage more people to see themselves as a golfer.



More than half of regular golfers intend to spend more on golf related purchases in the next 12 months.

Occasional and infrequent golfers are more likely to not change their spending habits on golf related purchases in the next 12 months.



- Spend less on golf related purchases in the next 12 months
- Spend around the same on golf related purchases in the next 12 months
- Spend more on golf related purchases in the next 12 months
- Don't know



Encouraging more people to play and have **coaching with a PGA Professional** will help people feel like a golfer and drive spend.

Increasing frequency of play will likely result in increased spend and engagement.



By helping the wider golfing audience realise the many benefits that playing golf can bring, not just to health but as a source of fun and entertainment, we can **support the growth of golf in all forms.**



For more information please visit
golf-for-all.co.uk

