

Female
participation in 2019

14%

Female participation in 2020

28%

Golf's GENDER OPPORTUNITY

DESPITE widespread good intentions and numerous worthy initiatives, pre-Covid, only 14% of all golfers in the British Isles were female.

Now, following a record-breaking 2020 that saw up to a million more women play a round of golf compared to the year before, opportunity knocks.

Golf has the chance to become a sport that is truly open and welcoming to women of all ages, abilities and backgrounds.

We wanted to showcase some of the great work already underway as well as consider what the right directions of travel are to ensure that we look back on 2020 as the beginning of a new era in golf rather than a blip.

We've spoken to:

- Current tour stars
- Past tour stars
- Solheim Cup captains
- CEOs of golfing organisations
- MDs of global golf companies
- Managers of golf clubs
- Industry professionals
- Powerful voices from other sports to offer an external perspective
- Grassroots volunteers
- Juniors
- Many of golf's plentiful governing bodies

We've also collated the most significant data so that you, the industry professional, can understand what the full picture is.

What we do with this information, and what happens next to the game we all love, is not up to women or, for that matter, men. It's up to every single one of us in the golf industry. [GEO](#)

Women in golf: The key data

IN THE BRITISH ISLES



5.2m

Number of people in the British Isles who played a round of golf in 2020



2.9m

Number of people in the British Isles who played a round of golf in 2019



1.46m

Number of females in the British Isles who played a round of golf in 2020

79%

Rise in number of people in the British Isles who played a round of golf in 2020 compared to 2019

Digest the startling figures from 2020 and learn about women's golf – and sport – on a global basis



EXPERT
COMMENT**“2020 WAS A HIGH WATERMARK - AND FEMALE GOLF WAS A STRIKING BENEFICIARY”**

Richard Payne, director of Sports Marketing Surveys (SMS), explores what SMS and The R&A's new participation research means for women's golf in the British Isles.



2020 was undoubtedly a good year for golf. When courses were open, rounds played surged. Now, our new research has quantified that those rounds weren't just being played by existing golfers, but by a number of new players as well. The 5.2m players last year marks a high-water mark for the 21st century. 16% of 2020's golfers tried the game for the first time, and a further 20% had not played for at least a year before coming back to the sport in 2020.

Female golf has been a particular beneficiary. A quarter of female golfers in the UK in 2020 were first timers inspired to play because of the pandemic. A further 29% hadn't played for between 1 and 3 years.

This is not yet mission accomplished. Compared to other sports, golf's gender ratio* of 72% men to 28% women compares unfavourably with sports like tennis (54:46), cycling and running. A random sample of men in Great Britain is likely to unearth more people who play or at least considered golf than an equivalent sample of women.

But, for a sport whose gender ratio five years ago was 85:15, this is unmistakable progress.

Women were three times less likely than men to consider themselves 'golfers' before the pandemic, but only half as likely to consider playing during the pandemic. And in fact, once they considered playing, women were actually slightly more likely than men to follow through. 6% of men considered playing for the first time because of the pandemic but didn't end up doing so. Only 3% of women said the same. By contrast 7% of men did start or try golf for the first time because of the pandemic and 5% of women did the same. This suggests that some of the perceptual work that has been done to make women feel more welcome is starting to pay off.

The figures also provide reassurance for those who have worried that the pandemic participants

might quickly leave the sport. 95% of all new golfers (including both men and women) identified by the SMS research intend to continue participating, with injury (44%) and expense (40%) the most commonly cited factors that might impact this. Work and family commitments – 28% of new golfers in 2020 have children under 16 – were also raised by more than a third of new players.

As routines return to something like normal over the months to come, ensuring that men and women can have satisfying, sociable experiences at the golf course in a flexible way is crucial. The importance of socialising to women in particular is a recurring trend in research. During the first UK lockdown, SMS's insights highlighted that 60% of women felt they missed socialising at the golf club. Only 52% of men said the same.

For a long time, golf's demographics have dictated that the biggest lever for increasing female participation would be men introducing their wives and girlfriends, daughters and mothers, to the sport.

The surge in female participation now leads us to a point where women introducing other women can start to play a greater role in golf's future. That isn't to say that clubs and federations can rest on their laurels. Ongoing investment is required. But equally, a virtuous circle where women are more likely to see and hear other women playing and talking about golf is much more plausible, and much more powerful, today than it was five years ago.

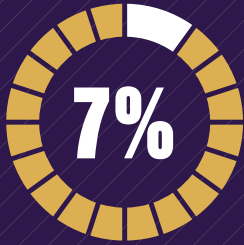
• **The full report on golf participation can be purchased for £1,600 from the SMS online research store: sportsmarketingsurveys.com/reports. An equivalent report for Ireland is available for £1,000. To understand how your business can appeal to new or existing golfers, or for more information about SMS, contact Richard. payne@sportsmarketingsurveys.com or visit sportsmarketingsurveys.com**

*full length course users (9 or 18 hole)



UK GOLFERS IN 2020

The world changed profoundly last year - and that is certainly true of golf in the United Kingdom



Of UK golfers surveyed in 2020 who played at least one round per year but less than one round per month are female

38%

Of UK golfers surveyed in 2020 who had never played a round of golf before were female

11%



Of UK golfers surveyed in 2020 who played at least one round per month were female

5%

Of UK golfers surveyed in 2020 who were not members at the start of the pandemic but had since become or begun the process of becoming a member, 5% were female

INTERNATIONAL WOMEN'S DAY

Now an established event that captures the public's imagination worldwide

28 countries, **485** locations, **50,000+** participating women

1,000 golf facilities around the world hosting a variety of golf events

GOLF IN THE USA

How do our numbers compare with the biggest established golfing nation?



27%

Percentage of female golfers in USA in 2014



31%

Current percentage of female golfers in USA

FEMALE GOLFERS & COVID

Why did so many women play golf last year?

- Female golfers were more likely to state the safety element of golf as a reason they were playing more than men
- Female golfers were likely to say they missed socialising at the club more than men

60% VS 52%

In 2020 there was a higher % of females than males that...

Returned to the game because of the pandemic after having not played for a year **(54%)**

Returned to the game because of the pandemic after having not played for 3 years **(61%)**

Started or tried the game for the first time because of the pandemic **(59%)**

7% of UK golfers who had previously played, but not for a year before, are female



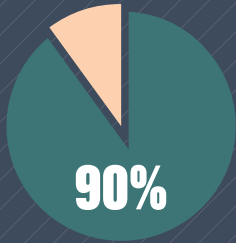
540,000 Irish adults who played a round on a full-length course in 2020 – up from 321,000 in 2019





GOLF AND FAMILIES

If we could turn golf into a sport that truly matched the needs of families then the potential for growth would be huge



Golfers who say one or more other members of the same household also play

65%

Golfers citing a family member as the main reason for taking up golf

14,800,000



Number of families with dependent children in the UK

WHY FAMILIES PLAY GOLF

Competitive elements: **27%**

Socialising with friends and family **68%**

Exercise and health **76%**

THE GLOBAL PICTURE

Female golf around the world



\$35 BILLION

The global economic value of increased female participation

720 Additional children

that 1,000 new female golfers could introduce compared to 1,000 men



DATA SOURCES

- SMS 2020 Golf Participation research
- SMS research conducted among golfers after the first Covid Lockdown
- SMS survey, 2021
- SMS 2019 Golf Actives research
- Women's Sport Trust, 2021
- Syngenta

**“WELCOME
WOMEN.
Make golf
accessible.
*Make it
enjoyable.*
SPORT’S
ABOUT JOY.”**



Sue Anstiss MBE, who is a Special Adviser in Women's Sport at SMS, has driven change in women's sport for over 30 years. Here she considers, from her external perspective, the challenges and opportunities for golf in 2021

W **HERE do you think women's sport is now compared to your early experiences?**

It's transformed, really. I look back and think even when I was growing up, and then in my early career, and my filter wasn't really aware that we only mainly supported men's sport and men's teams. I look back and think I never really noticed that at the time. So yes, it's massively changed. But primarily in the last 10 years, I would say, we've seen the biggest shift in terms of the momentum of major events and big changes that have happened.

And what can you point at as a tipping point?

I think we'd like to say it was London 2012, and definitely lots came from that. It's talked about as the women's games because it was much more equal.

That's when people began to talk about it seriously, when funding came into women's sport, in terms of semi-professionalism and

professionalism for rugby, cricket and football. I feel like there's an unstoppable momentum now because so much has changed. In the 2019 FIFA Women's World Cup there were 11.7m people in the UK watching the semi-finals so you do feel like we're moving in the right direction. Even with Covid I don't think we're going to go backwards now.

Can you give us an example of a sporting success story, that perhaps golf could aim at?

Football, I guess, is the one we cite because it is the global sport. I saw some research that said 46% of global adults put it as their favourite sport. And so there is a reason that it's so popular: It's so accessible. You just need a football, and anyone can play. I think what football has done from a British point of view with the FA and WSL and the Barclays sponsorship and TV deals with the BBC and Sky Sports is fantastic. But building it up has taken a good 10 years.

Coming off the back of the World Cup, having those opening games of the season with 25,000 at



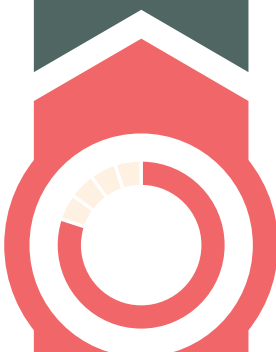
11.7m

UK viewers for England's 2019 Women's World Cup semi-final



22%

of worldwide viewers of all sports are female



80%

Of the most visible female athletes play mixed-sex sports

Stamford Bridge and 32,000 at the Emirates, and then they packed out Wembley for the friendly against Germany, was the confirmation. So I think they've done a really good job.

They've put money behind it and they've got great people marketing it. I think they've taken it very seriously. At the end of the day, it's about investment. That's what's going to make the difference. It's not just thinking it's going to happen naturally through society. I think that's what the FA have done. They've seen the growth and obviously there's then a commercial opportunity to then sell more rights, sell more sponsorship.

In terms of participation, the fastest growing area of participation for rugby right now is with the women's game and the same for football. And that's the same for golf too.

You've worked in nearly every sport apart from golf. Is that purely coincidence?

That is a very interesting question. I guess I've worked a little bit in golf, with American Golf, and TopGolf at the beginning, though my background was more fitness and fitness clubs.

We worked for a little bit with Callaway, I went off to Florida to the PGA Show, and I found at the time it was just so exclusive. A colleague of mine at the time, an account director, played golf and was a really good golfer. So we went for her to try and get some of the business you know, but it was almost as if for PR at the time it was blokes that loved golf or were very good players.

What is your perception of golf as an outsider?

It hasn't really changed. I feel like there's lots of talk about change. And there are some amazing people working within golf. So I don't want to disparage them. But talking about it as an outsider, I've always felt slightly excluded. That whole not quite knowing the rules or the right things to say.

So my perception is of feeling uncomfortable as a woman in that environment – not knowing if I'm going to walk into the wrong door. I just feel like I don't want to be here.

I've always talked about how I should play golf and golf will be good for me. But I've got to overcome so much to get into it whereas if I want to go and swim in the lake I can just rock up this evening – whereas there's just too much to overcome in golf for me to get there.

I hear so much great stuff golf is doing – like with women's leadership – and I don't want to be too negative, but has the product changed enough that I feel I would know what to wear, and where to go?

Well, I don't and I'm the captive audience. I'm an active, middle-aged woman who would like to play golf but I don't really feel it's inviting enough for me at the moment.

Do you feel the same about other sports?

Well, cricket is a little bit similar to golf in that whole not quite knowing what to say and what to wear, but I think the Hundred will really help cricket in that respect.

Rugby's been helped because the women's game has grown and we've had such success but golf's got female success too and I don't feel in a rugby environment or going to meetings at Twickenham uncomfortable in a way that I would do within golf.

That might be my own sense of needing more confidence. But I'm not an unconfident person.

Yet when I think about golf, I've got a bit of a dodgy hip so I've been doing my walking and golf would be really good to me. But where would I go to get started? I don't know.

Does golf need to do a better job of dismissing the preconceptions or challenging the preconceptions, or do better

about promoting what it's good at?

I'm a glass-half-full positive person – get out there and change it. I think in sharing the positives, there's a way to overcome some of those negatives too.

A friend of mine's husband joined a 9-hole golf course, and they go over at seven in the evening. And she said he'll take you along, which is really lovely. But actually, I'd like golf to have offered me that rather than someone's husband making me feel comfortable with the rules and all that stuff that goes with golf.

Why has golf not said to me to come on down? I'm sure there are programmes but I'm obviously not being reached by them at the moment.

What, for example, has rugby done to become more welcoming to women? Because that wasn't always the case, was it?

It's interesting, because I don't think rugby's perfect. I actually sat on the diversity and inclusivity advisory group for the RFU.

There's still lots that could be improved, but it's better than it was to walk into a clubhouse. I guess that participation and investment

in the product in the inner warrior and all the campaigns they've done to drive women and girls into rugby has helped with making the sport itself an accessible place. Then through that comes more coaches and people involved in the sport. It's about women feeling they're totally part of a sport – not just from a playing point of view, but also as spectators and coaches and officials.

A lot of it is openly talking about the fact that you need to change a product.

Even the physical facilities: if you think about a rugby club it's a nice, slightly shoddy space with a bar and everything's much more simplified in terms of knowing where to go and what to do and please take your muddy boots off at the door if you don't mind.

In a golf club, even in the car park, you can't park here, it's for the captain – so from the moment you drive in, I feel uncomfortable.

I think it is about accessibility. The whole This Girl Can campaign was about why women don't take part in sport and it's about fear: a fear of not knowing what to do, not knowing where to go, how will I



SUE'S SPORTING CREDENTIALS

"For 25 years, I've run a sports PR agency, Promote PR, doing a lot within grassroots sport, and with women's sports – netball, cricket, hockey, rugby. I'm a founding trustee of the Women's Sport Trust charity that was established in 2012, after the Olympic Games, to drive visibility and awareness to get more commercial funding into women's sport.

"I'm a co-founder of the Women's Sport Collective, which is a network of women working in the sport sector established last year, backed by Sky Sports now, which is fantastic. I established Fearless Women, as an agency to house all the things that I do. I'm the host of the Game Changers podcast, which interviews and features trailblazing women in sport from all sports, supported by Sport England and Barclays.

"And I've written a book that's published in September 'Game On: The Unstoppable Rise of Women's Sport' which follows my journey to look at the history, how we got to where we are. I got an MBE in 2018, for my contribution to grassroots and women's sport, too.

"So that's me. I wear many hats."

|| The whole This Girl Can campaign was all about why women don't take part in sport, and it's about fear. **Of not knowing what to do or where to go or how to look.** And golf is the epitome of that: I don't know the rules, I haven't got the right kit and I don't know where to go."

England and the USA line up for their 2019 World Cup semi-final – a match watched by a UK TV audience of 11.7m



look. This Girl Can was saying it's fine to be sweaty.

Golf is the epitome of this: I don't know the rules, I haven't got the right kit, I don't know where to go. So it's all that fear magnified. We need to get rid of that element of fear.

Welcome women, make it accessible, make it enjoyable. Don't feel like you'll be in trouble for making too much noise or for

having fun on the golf course. That's what sport should be, isn't it? Its joy.

There's definitely that female going along with others thing. Could I go and meet other women or take other women or go into small groups? But it needs to be the right product that gets over that fear factor.

So there's definitely that opportunity – not by changing the



product but by making the product accessible and then just going out and reaching out to women and letting them know it's there for them. I think that in itself could have quite a significant impact.

I do think it's too broad to say 'we're appealing to women' like women are a homogenous entity. So you might identify a target audience. What do those people read? What do they consume? And how can we reach them? [GEQ](#)

ABOUT SUE

Sue has driven change in women's sport for 30 years. A founding trustee of the Women's Sport Trust, and co-founder of the Women's Sport Collective, in 2018 Sue received an MBE for her services to women's sport. Her podcast *The Game Changers* celebrates trailblazing women in sport and her book *'Game On. The Unstoppable Rise of Women's Sport'* is out in September. Sue is now CEO of Fearless Women, a company with a powerful ambition to drive positive change for women's sport.