

# Golf & Social Media: The Great Divide

Insights, Analysis & Solutions



Social listening data provided by Ipsos

# Guide to Interactive Features

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Roll over 'plus' buttons with your mouse and data will pop-out



## ORANGE ARROWS

Click on the orange arrows to bring up additional information, navigate between pages and return to **CONTENTS**



## ROLLOVER SHAPES

Wherever there are large shapes or graphics, such as the **'Topics'** circles on page 10, **'Motivations'** on page 25 and the **'Insiders'** and **'Outsiders'** triangles on pages 27 and 28, roll your mouse over the shape for additional pop-out data

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# Understanding Audiences for Business Growth

## Why Syngenta commissioned Ipsos to undertake an international social listening project

For more than a decade, Syngenta has produced groundbreaking global customer insights reports to help the golf industry better understand customers, develop informed solutions and grow green grass businesses

Syngenta was the first organization (2016) to evaluate the global economic opportunity of increased female participation: \$35 billion per year

The growth of social media and digital platforms offers valuable new insights on what customers and prospects are saying and reading about golf, what their experiences are and what golf businesses can do to engage and monetize diverse audiences



# About this research

In this presentation – and subsequent reports – we will:



## Explore Key Conversations

Explore and analyze online conversations about golf, spotlight the most talked about topics, examine the image and reputation of golf



## Analyze Online Reviews

Explore customer reviews, identify and prioritize key pros and cons, highlight opportunities to optimize customer experiences



## Deep Dive Topics

In subsequent follow-up reports, we will take a deep dive into important and relevant topics and conversations, including: Gender, Diversity, Golf Experiences and Sustainability.



# Methodology

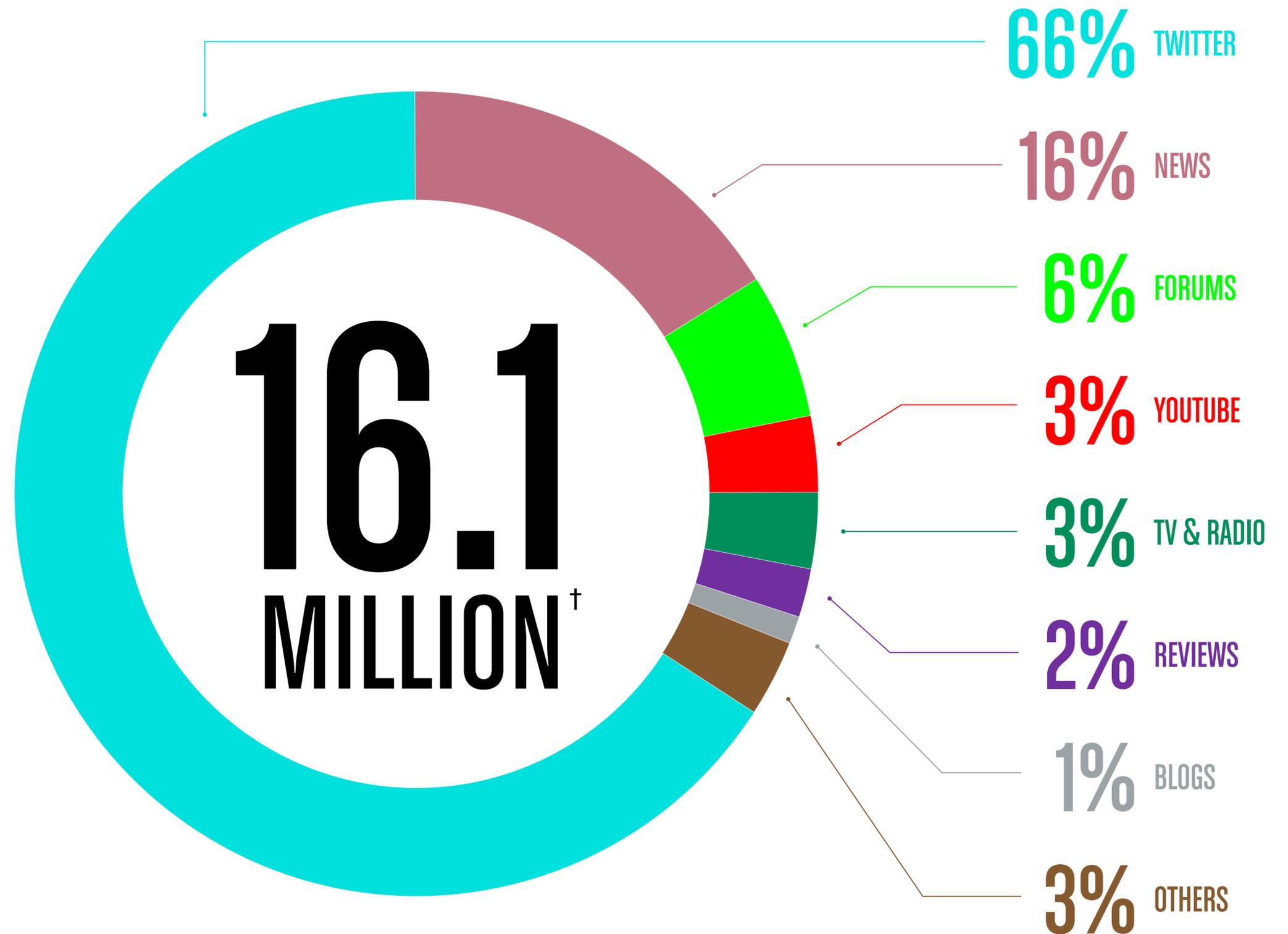
To explore and analyze what people said about golf, and their experiences of golf, Ipsos deployed its digital platform Synthesio to crawl major social networks and digital sources:

Public posts, articles, comments, blogs, shares and retweets matching keywords about golf and related activities were collected. (Private social accounts, groups and messaging apps were excluded for GDPR compliance.) Twitter and news media account for 80% of the content volume.

The research was focused on English language content in the United States and the United Kingdom\*, from July 2019 to August 2022.

In total, there were 16.1 million mentions of golf in our sample†.

\*Based on IP address and profile location



# News Drives Conversations

There were 16.1 million mentions of golf in our sample. News of professional tournaments, especially golf's four majors and The Ryder Cup, generate peaks of interest.

But one individual and related controversial topics supercharges online activity, dominating conversations on Twitter and news platforms: Donald Trump.

More than a quarter of all golf mentions referenced Donald Trump. Four out of five mentions are negative in tone, typically relating to controversial news (e.g. playing golf during the pandemic, 2020; Trump venue hosting a LIV Golf event, 2022). Each mention is amplified by a huge number of retweets which, interestingly, if removed from the research would show that professional tournaments, not politics, would be the most popular subject. However, controversy around LIV Golf contributes significantly to this topic.



## WHAT SYNGENTA THINKS

Twitter and news channels are driven by politics and controversies. With 80% of coverage and conversations about Donald Trump being negative in tone, golf's reputation is negatively affected, albeit indirectly, by the reinforcement of the sport's image as an exclusive activity for privileged men.



# Experience Drives Interactions

While news about golf is predominantly negative, posts about playing and experiencing golf are positive.

Instagram accounts for less than 1% of all golf mentions, but generates 41% of all interactions.

There is a large and diverse community of users, from local creators to celebrities with large followings, generating engaging lifestyle content, reflecting golf experiences in an entertaining and aspirational way, resulting in significant interaction with audiences.

Picture: love.golf



“

## WHAT SYNGENTA THINKS

Instagram appears to offer golf a sweetspot for content and conversations. Despite less mentions in our research, user interactions are exceptionally high. Fun and aspirational content reflecting the experience of golf appeals to a larger, more diverse audience, including both golfers and non-golfers.

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# You're Either A Golfer... Or You're Not

In the same way that conversations about golf tend to be polarized around either politics or personal experiences of golf, there is also a clear divide in audiences: you're either a golfer, or you're not.

One of our key findings from our analysis of online conversations is that there is a persistent gap between golf enthusiasts and the rest of the population. Golfers focus on different topics and express different mental associations with golf.

The important difference is based in whether individuals perceive and project themselves as golfers, irrespective of ability or commitment. If you're a golfer, you're in. The issue is whether a prospective player can perceive themselves joining the golf community and whether they feel it is sufficiently inclusive.



“

## WHAT SYNGENTA THINKS

The exclusivity of golf at all levels – from arcane rules and dress codes to lack of diversity – has been evident throughout 10 years of Syngenta market research. What this new insight reveals is that golf's exclusivity, real or perceived, is reflected and enforced in online conversations. The challenge and opportunity for golf businesses is to change the image of golf, enabling and empowering prospective players to perceive themselves as golfers, joining an inclusive community.

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# PART 1

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# Conversations

Picture: Stephen Chappell / Royal Bled

# Big Conversations, Key Topics

One of our key findings from the analysis of online conversations is that there is a persistent gap between golf enthusiasts and the rest of the population. Golfers focus on different topics and express different mental associations with golf.

What are people talking about online? To sort through the 16 million mentions of golf in our sample, we used 'Topic Modelling', an algorithm to identify clusters of conversations. Spam, duplications and short posts were deleted to leave pure posts and a refined overview of stand out 'Meta Topics,' which are then weighted to create a complete 'Topic Landscape.'

**In total, 93 distinct topics were identified, clustered around 10 Meta Topics and a smaller group of others.**



# 1 Professional Golf 20%

While golf's major championships and The Ryder Cup create spikes in news and social activity, the ongoing conversation and controversy around LIV Golf made it a prominent topic.



## More...

Can the rise of women's sport grow golf participation?

Olympic Golf set to appeal to new audience

Tiger takes on golf entertainment & Can Topgolf grow on-course participation

# 2 Personal Experiences 16%

Golfers like to talk about their golf experiences. From anticipating weekend outings to golf trips and the best courses played, there is a significant number of posts, predominantly expressed with positive sentiment. Personal performance also features prominently.



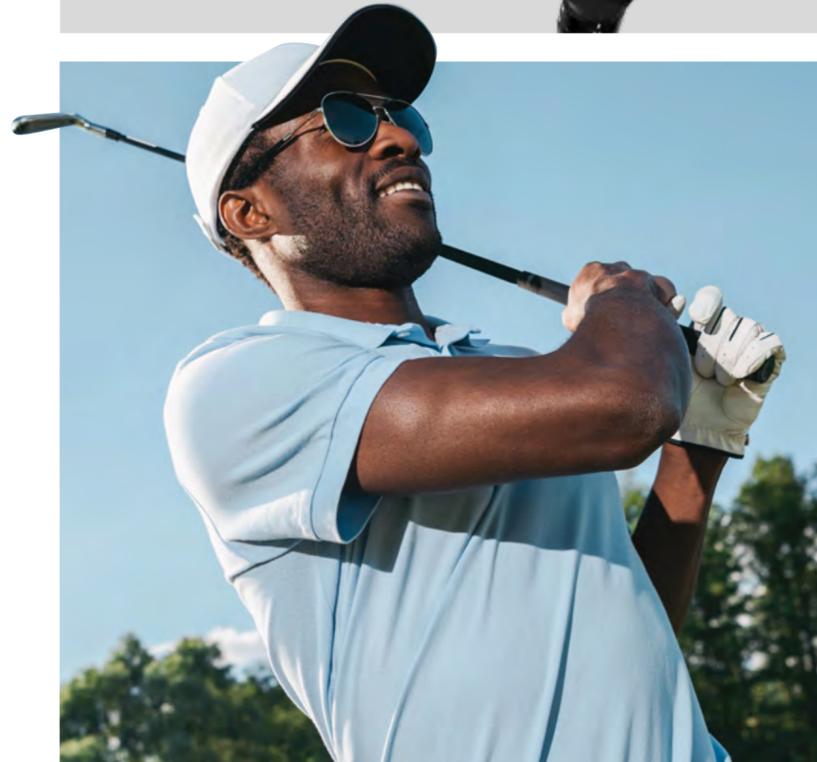
Picture: Camiral Golf & Wellness

## More...

- How to get 50 new members, quickly
- Rethinking golf
- Can golf fit into modern family life?

# 3 Equipment 13%

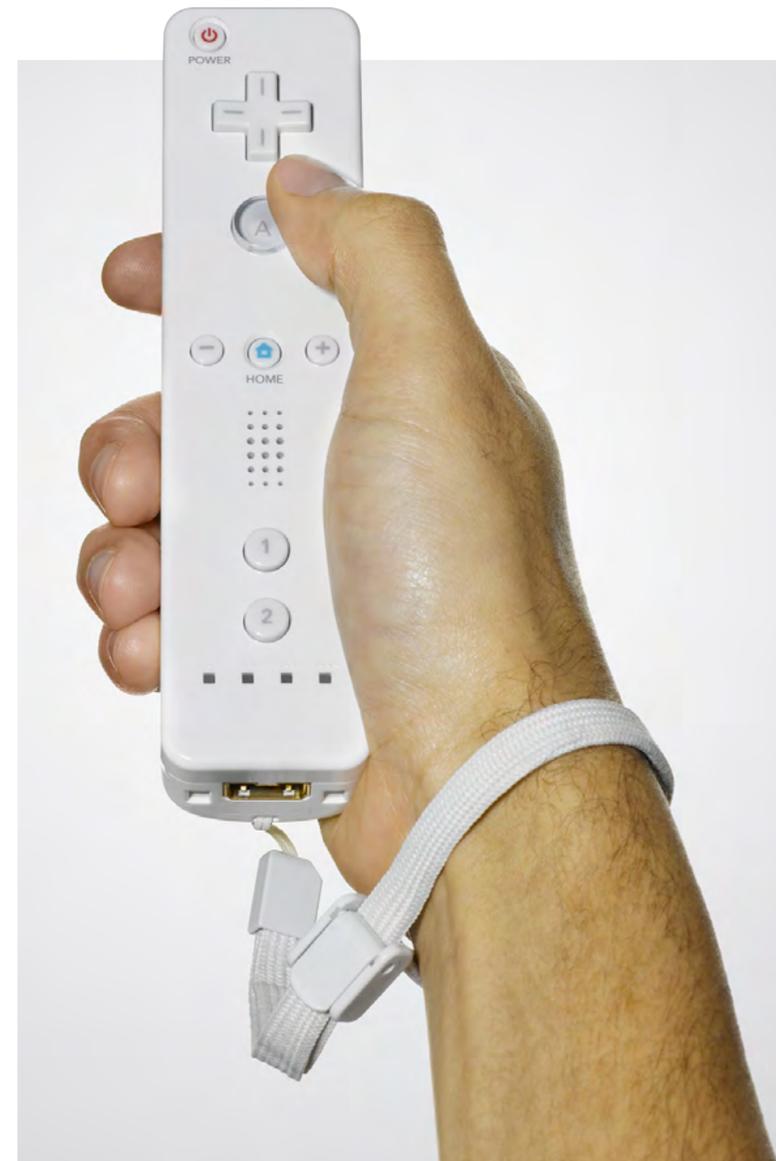
What to use and what to wear on the golf course are major talking points, with golfers reviewing clubs, balls, shoes and clothing. Golf tech, including performance monitoring and distance measurement, as well as reviews of retailers, also drive conversations.



Picture: Royal Albartross

# 4 Gaming 9%

The rise of gaming is reflected in social media posts and conversations. Golf games, it would appear, have a wide appeal, with Mario Golf proving especially popular



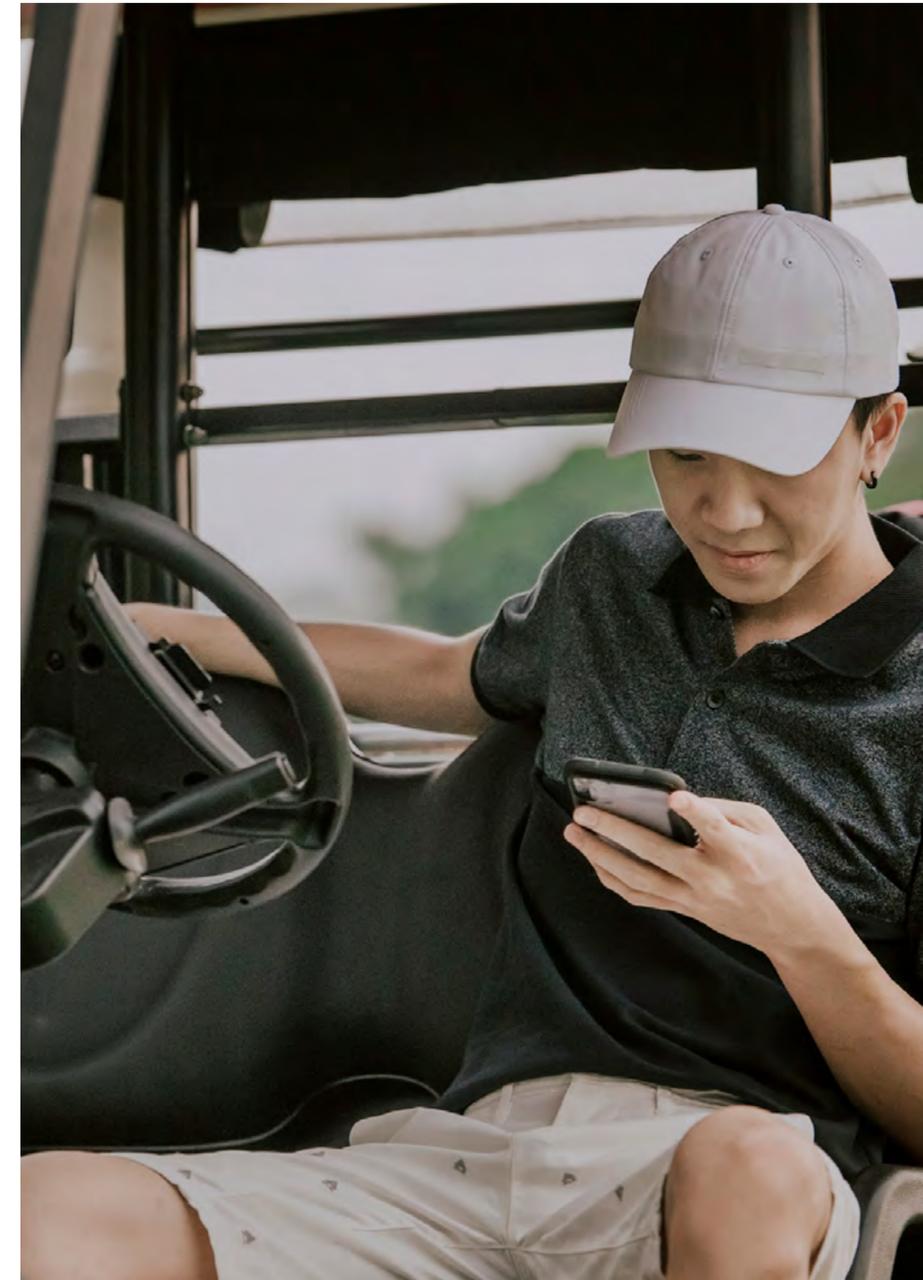
## More...

Can Topgolf grow on-course participation?

India's golf boom attracts game-changing investment

# 5 Golf Content 9%

Diverse golf content, from trending profiles to influencer-produced entertainment, drives conversations and mentions across social media. The growth and popularity of podcasts is also evident.



## More...

Changing the Business of Golf with Fame Tate

Influencers gather for love.golf event

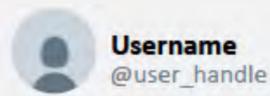
Will Netflix drive the next golf boom?

# 6 Charity Golf 9%

Golf aligned to charity and fundraising is prominent in social conversations.

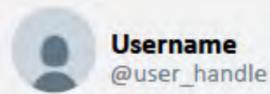
**9%** of posts mention **charity golf tournaments**

Players announce their participation in charity tournaments, while charities and event organizers seek sponsorship for golf events, including auctions.



Username  
@user\_handle

Looking forward to being part of the Golf Day raising funds for the fantastic Gloucestershire charity.  
(Twitter)



Username  
@user\_handle

Calling golfers sponsors!  
We are 5 months out from our 3rd annual charity golf tournament.  
(Twitter)



# 7 Politics & Golf 6%

Golf and the environment is a recurring topic on social media, with debates relating to water consumption and targeted protests by climate activists against golf courses highlighted. Donald Trump, members of the Republican Party playing golf and white supremacists arming themselves with golf clubs at Black Lives Matter events were also themes that sparked reactions.



## More...

How to make golf courses more sustainable and climate resilient

Golf under threat?

Unlocking diversity: golf's opportunity to access untapped communities

Picture: Stephen Chappell / Royal Bled



# 8 E-Commerce 5%

Aligned to conversations and reviews of golf equipment, retailers, brands and venues use social media platforms as a channel for advertising products and packages.



Check out Tiger Woods Collection Men's Nike White Short Sleeve Polo Golf Shirt Large L (Sports Illustrated)



Stay at the stunning The Mere Golf Resort Spa, Cheshire. 1 Night 2 Round's Dinner Bed Breakfast 149pp (Twitter)



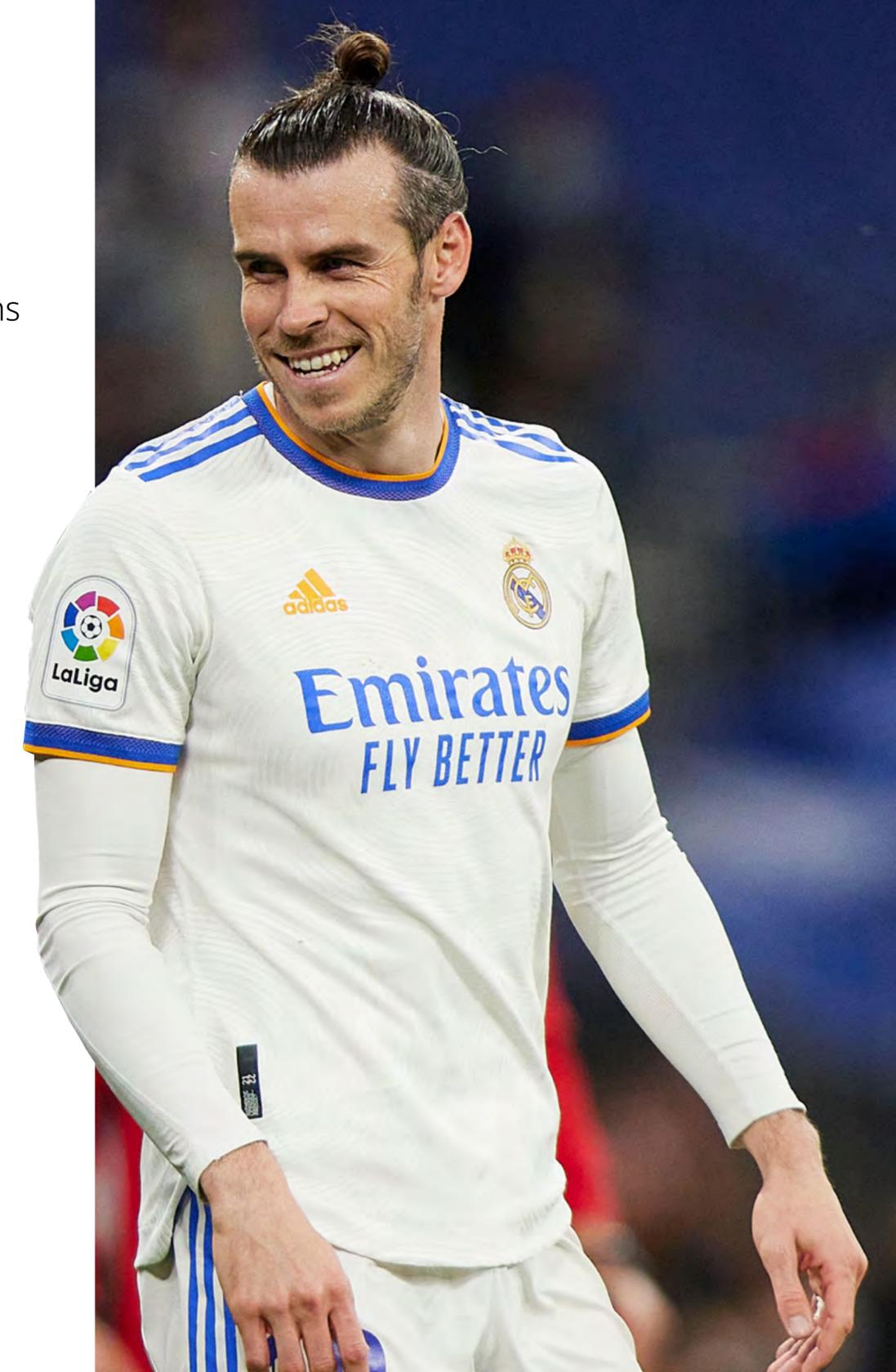
Stop by the golf shop this weekend only to save BIG on Father's Day gifts! (Twitter)



I bought this umbrella for both golf and daily life. I live in southern California, so primarily use it to keep sun off me during rounds of golf. (Amazon Review)

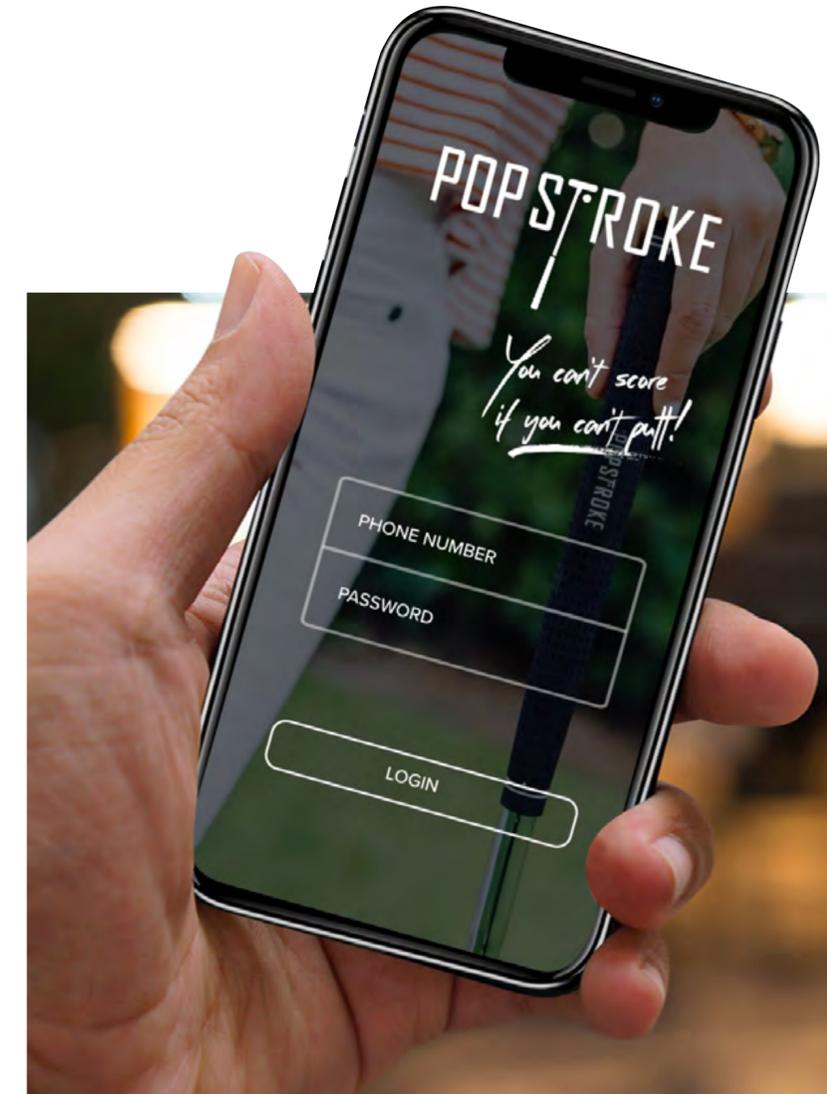
# 9 Famous Advocates 4%

The link between golf and famous personalities is long established. In the United States especially there are mentions of NBA and NFL celebrities playing golf. Meanwhile, soccer star Gareth Bale, former Los Angeles FC and Real Madrid player, sparked conversations about his love of golf and whether it affected his on-pitch performance.



# 10 Golf Entertainment 3%

The rise of off-course golf entertainment is well documented. In the United States, it's estimated that the number of customers participating in off-course golf experiences has grown from 5.4 million to 15.5 million since 2014 (NGF). Hospitality experiences and the fun, social aspect, seen as ideal for date nights, are mentioned.



## More...

Can Topgolf grow on-course participation?

Timberlake backs entertainment golf concept

Popstroke opening in Florida

# 11 Other Topics 7%

In addition to our 10 Meta Topics, there were a number of additional themes worthy of mention:

## 2%

of posts mention **golf related gifts**

There were numerous online reviews of gifts, purchased primarily by women for husbands and partners (0.8%), as well as gifts for birthdays and anniversaries. Gifts included indoor putting mats, tech items, clothing and equipment. Christmas gifts (0.4%) and Father's Day gifts (0.4%) also featured.

## 2%

of posts mention **golf and housing communities**

A combination of promotional posts and comments relating to golf real estate and residential communities on golf courses, predominantly in the United States (2%).

## 1%

of posts mention the **impact of Covid on golf**

Opinions were expressed, reflecting wider conversations, about whether golf was a safe activity during the Covid-19 pandemic and whether courses should be allowed to stay open.

## 0.9%

of posts mention **dogs experiencing golf courses**

The appeal of pets on social media is well known – and posts featuring pictures of pet dogs on golf courses is no different: "My friend sent me pics of these pups who live on a golf course where they get to run free and happily greet every golfer." (Tweet)

## 0.7%

of posts mention **greens maintenance**

Posts on social media relating to greens maintenance were positive and tended to congratulate superintendents: "What a morning! Greens hand cut today, holes changed and leaf blowing continuing greens are looking fantastic!" (Tweet)

# Conversations: What We've Learned

Although conversations linking golf to politics travel the farthest, amplified by news media and Twitter, they actually only make up 6% of all conversations. Stories about professional and amateur players still make up more than a third of all conversations.

The results highlight an important opportunity for golf: 30% of conversations are focused on topics relevant to non-golfer audiences. Gaming, Charity, Famous Advocates and Golf Entertainment are all visible and relevant topics that can have a broader appeal.

**Golf's image and reputation could be enhanced through greater visibility of positive stories about golf: the content already exists.**

**This would also help balance elements negatively impacting golf.**

## PART 2

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# Customer Reviews

# Customer Reviews: Experiences & Expectations

So far, we've analyzed general conversations about golf, and what everyone reads and says about golf. This helps refine our understanding of the image of golf and whether people feel they should play or even have an interest in the game.

Next, we looked at online reviews and what customers said of their visits to golf courses. Importantly, these are customers who have come to golf courses and written a review, giving insights on their experiences and expectations

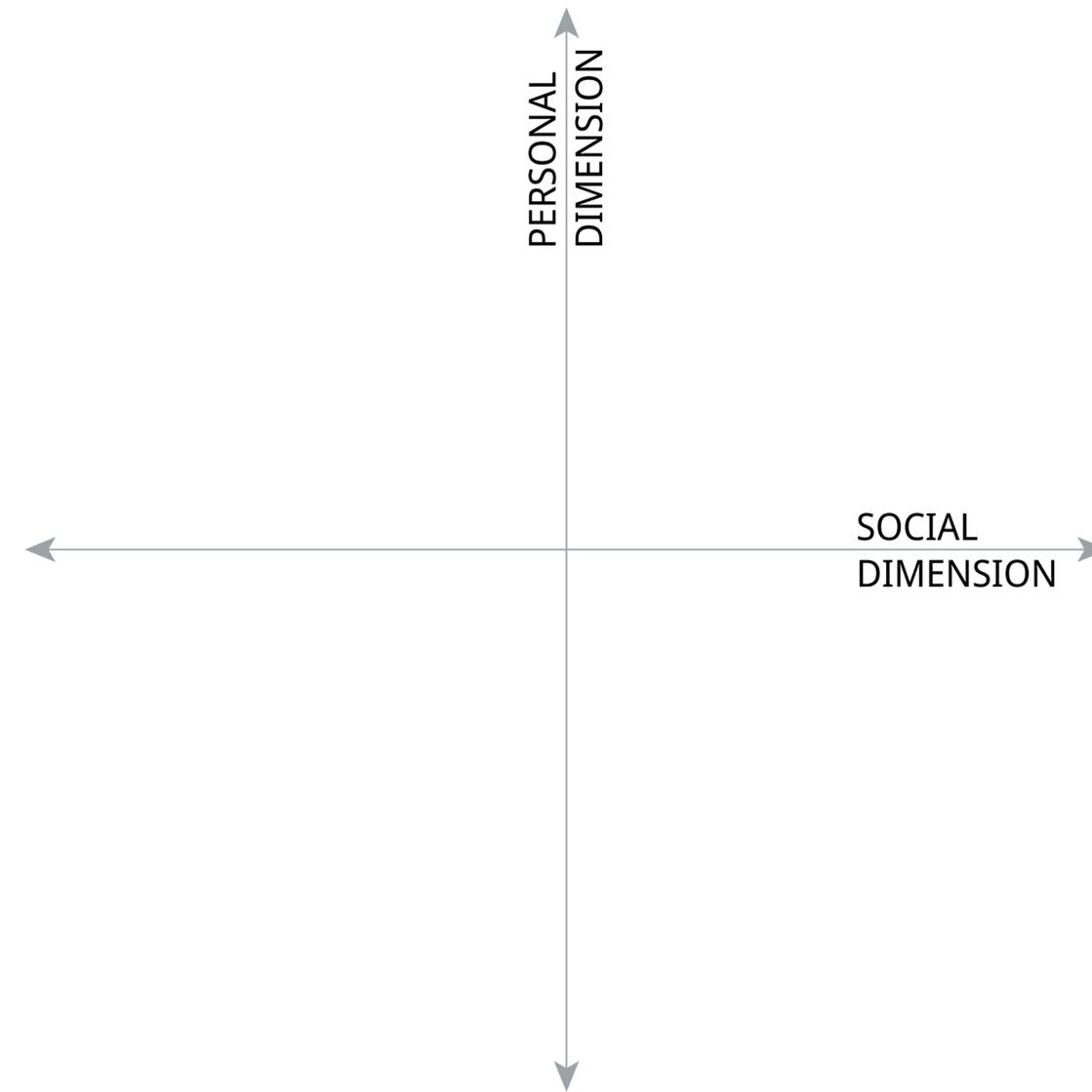
**This also gives us an opportunity to understand the motivations of different customers and understand why they play golf.**



# Motivations: Why We Play Golf

Using an analysis framework – **the Censydiam Wheel** – helps us define the motivations of different customers and why they play golf.

The framework crosses personal and social motivations to define four main behaviors and four secondary behaviors which, when applied to golf, helps us understand different expressions of motivations by golfers.



# Customer Profiles

Our analysis of online reviews has helped us identify two very different groups of customers.

There is a significant divide between the two groups: their motivations are different and they seek different experiences.

We're calling the two customer profile groups **INSIDERS** and **OUTSIDERS**.

## PROFILE 1: INSIDERS

These customers see themselves as golfers, aspire to play the best courses and play their best golf. They are happy with the established golf course experience and tend to oppose change.

**This group comprises mainly older men who play alone or regularly in small groups.**



## PROFILE 2: OUTSIDERS

These customers are looking for fun experiences and see golf as an entertaining activity. They are more likely to share fears (e.g. of not knowing the rules and etiquette) and frustrations, including when feeling they don't belong.

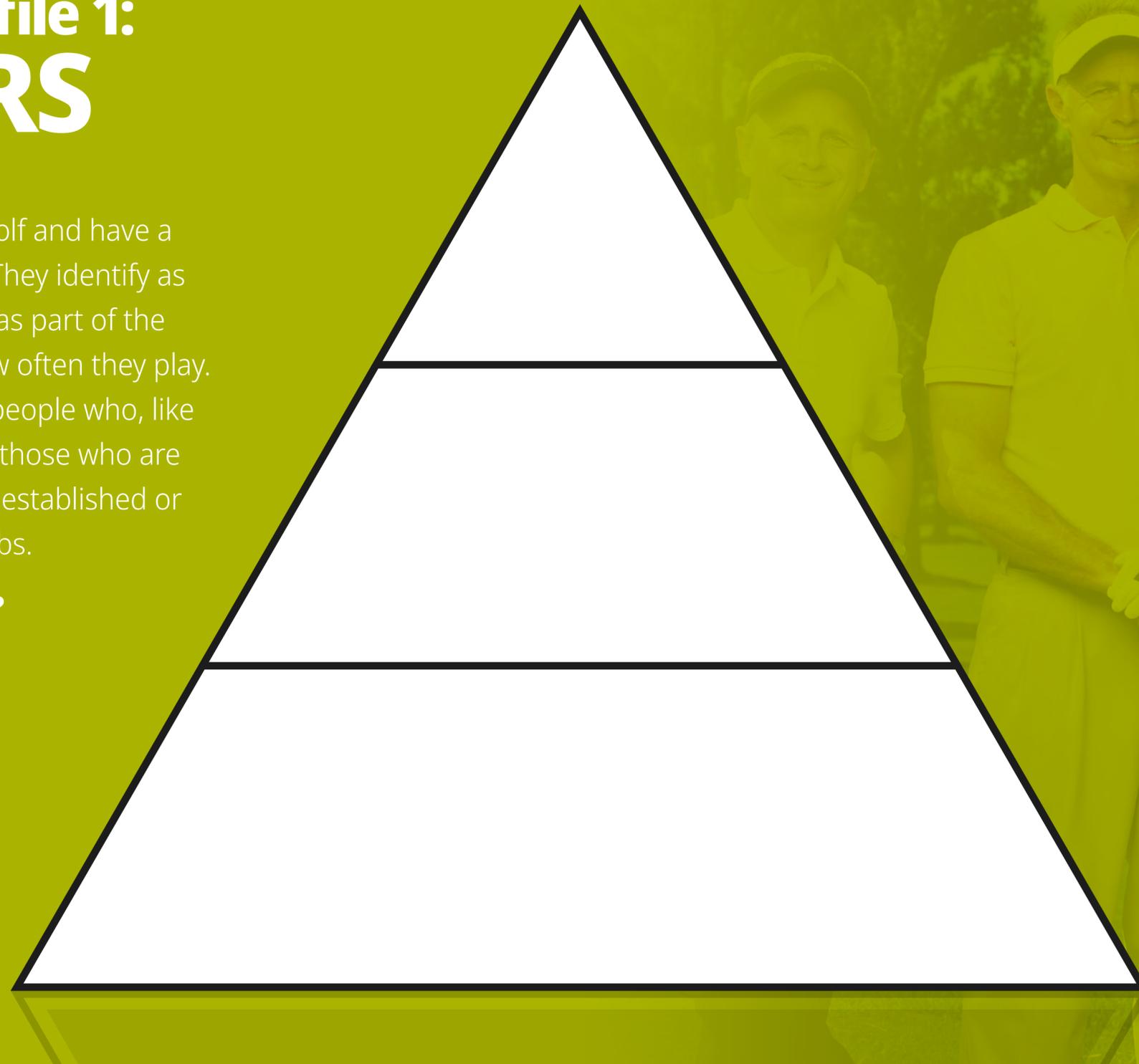
**This group tends to be younger, often composed of couples, families and friends.**



# Customer Profile 1: **INSIDERS**

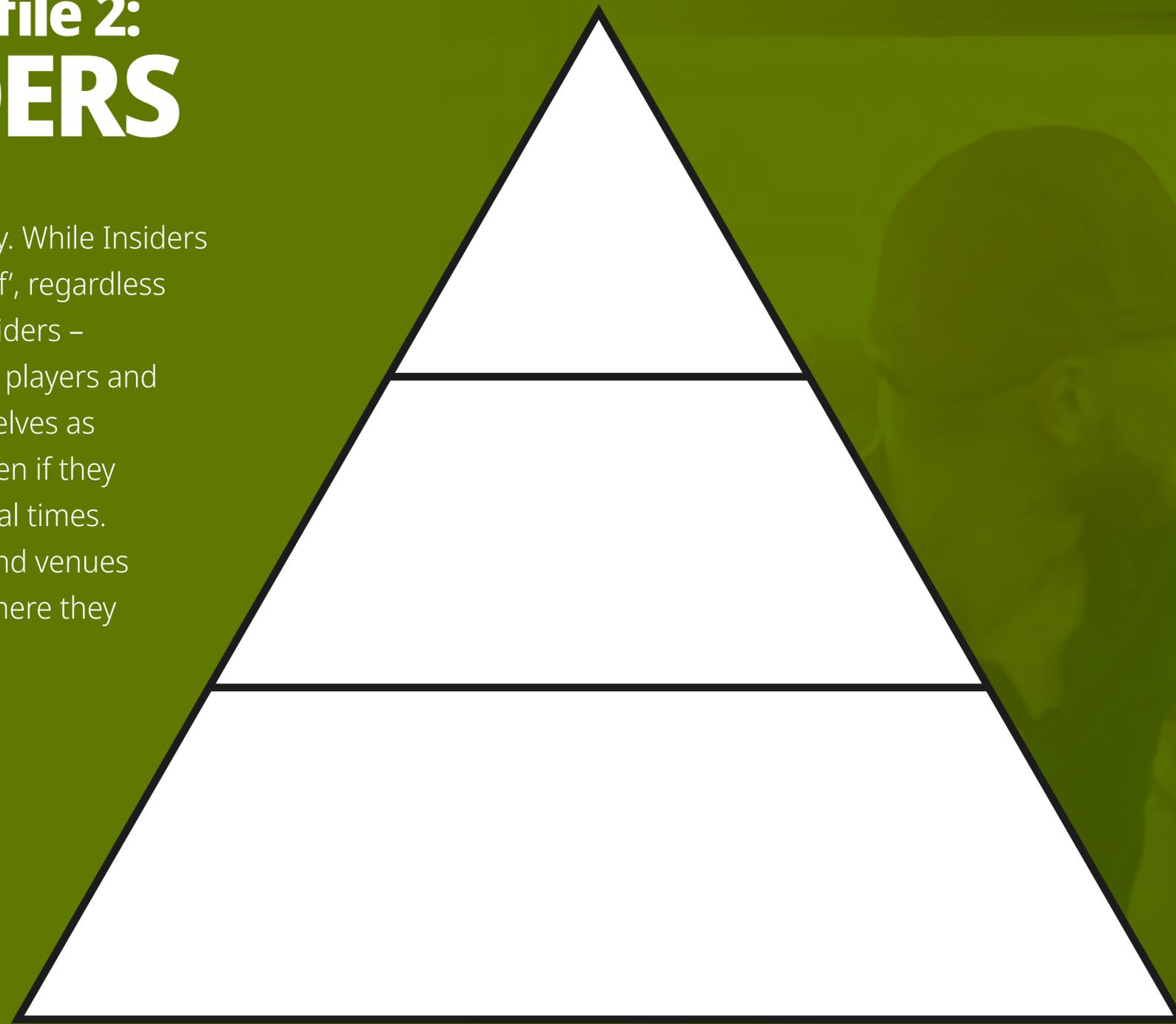
Insiders are committed to golf and have a strong sense of belonging. They identify as golfers and see themselves as part of the golf world, regardless of how often they play. They differentiate between people who, like themselves, are golfers and those who are not and will most likely seek established or aspirational courses and clubs.

## **What motivates Insiders?**



# Customer Profile 2: **OUTSIDERS**

Outsiders see golf differently. While Insiders have a high 'proximity to golf', regardless of how often they play, Outsiders – predominantly intermediate players and beginners – perceive themselves as outside of the golf world, even if they have been to a course several times. They will seek out courses and venues which are welcoming and where they feel comfortable.



## PART 3

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# Summary

# Bringing Outsiders In

Our analysis highlights two key motivations among Outsiders that golf venues can focus on in relation to experiences and customer service to bring more Outsiders in:

## ENJOYMENT

Ultimately, Outsiders simply want to have fun playing golf, with no worries or fear of breaking rules or etiquette.

## SOCIAL

Outsiders also want to share good times, as couples or friends and family, enjoying hospitality and entertainment as well as golf.



# Solutions

By listening to conversations on social media and analyzing online reviews of golf experiences, we have identified two different profiles of golf customers: **Insiders** and **Outsiders**.

At first glance, they may seem incompatible. But the sweet spot for golf course businesses is in the conciliation of both sets of customers, **growing the number of Outsiders, without losing Insiders**.

For individual golf courses and clubs, as well as the golf industry as a whole, the promotion and delivery of **ENJOYMENT** and **SOCIAL** to Outsiders, sharing good times with loved ones, family and friends, needs to be supported by two important activities:



1

**Improve the image of golf** to make it appealing to a larger, more diverse audience.

2

**Make golf more inclusive** and enable prospective customers to experience the best aspects of golf, in an environment and ambiance where they can enjoy the game, feel welcome and belong.

# What Syngenta Thinks

**The insights and opportunities highlighted by our analysis of social media conversations and online reviews is consistent with a decade of detailed Syngenta market research.**

Beyond the surge in demand linked to the pandemic, one important development since our last major market study in 2016 – when we highlighted a specific \$35 billion a year opportunity to increase female participation – is the continued rise of social media and online reviews as major channels of influence.

While important steps have been made to grow golf by better understanding customers' needs, more work needs to be done on both the image of golf and the delivery of experiences to match customers' needs, especially for 'Outsiders'. If not, gains made in the wake of the pandemic, as well as golf's future freedom to operate in matters of sustainability, especially water usage, could be threatened by increasingly vocal detractors.

However, taking a positive view and recognizing the opportunity, enhancing the image of golf and meeting the needs of both 'Insiders' and 'Outsiders', enabling them to share positive experiences on social media, in addition to other marketing channels, will enable golf's customers to be among its best marketers, sustain demand and grow golf.



**More work needs to be done on both the image of golf and the delivery of experiences to match customers' needs, especially for 'Outsiders'.**

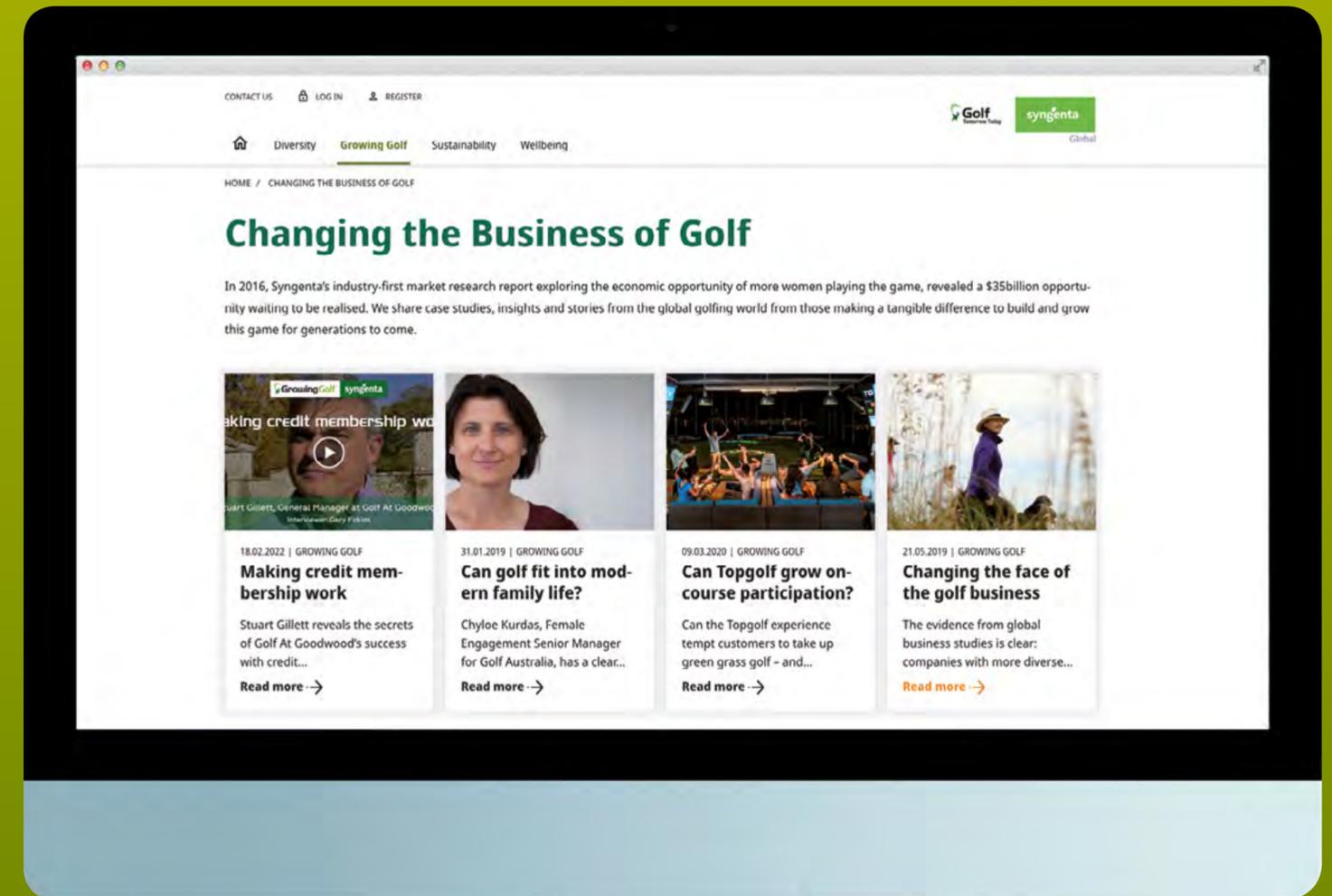
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# Next Steps

In the coming year, Syngenta will publish a series of insights-based reports based on our social media listening and online reviews analysis.

Specifically, we will be taking deep dives into a number of important topics and opportunities for the golf industry:

- > **Gender**
- > **Diversity**
- > **Sustainability**
- > **Golf Entertainment**



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