



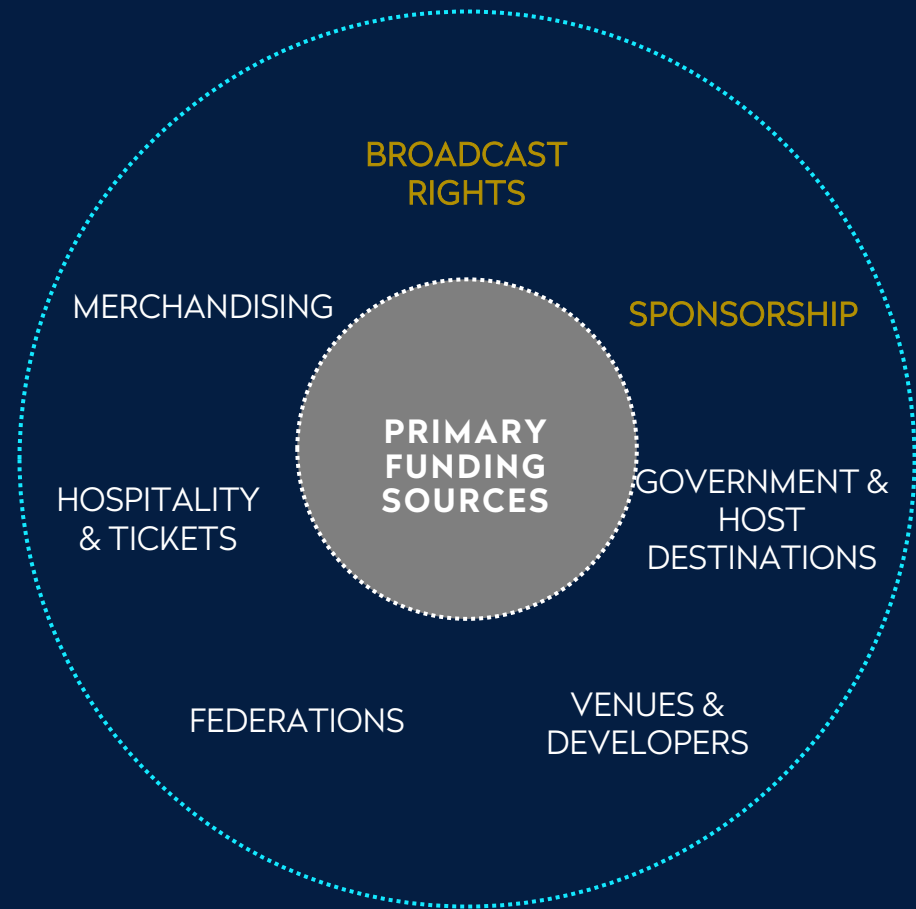
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FUNDING & SUPPORT

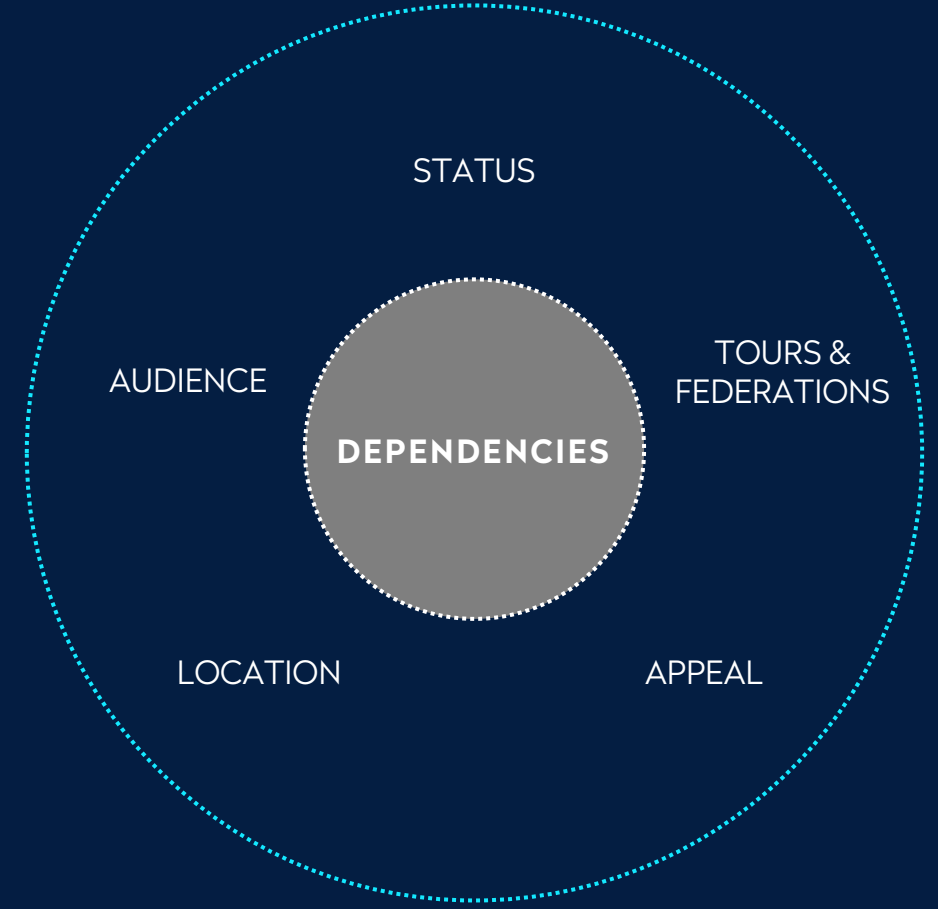
Ross Hallett - SVP, IMG Golf

R&A

Primary Funding Sources



Dependencies



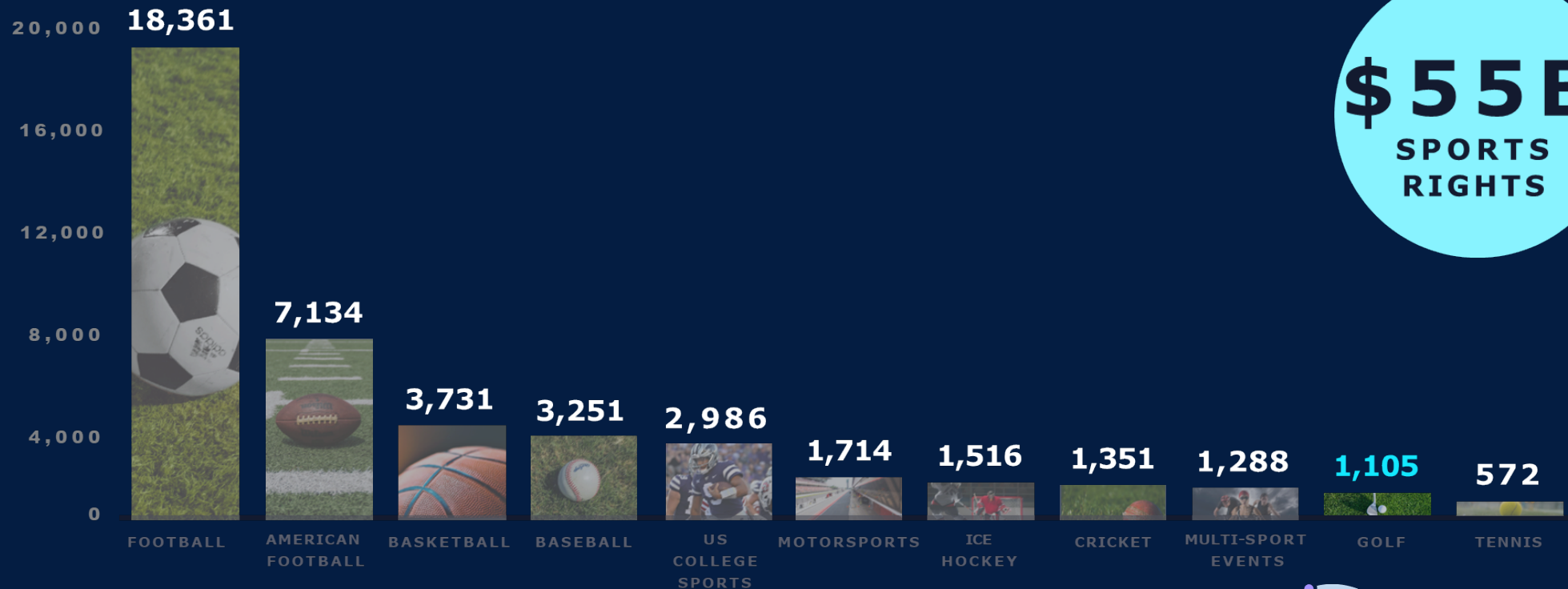
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LANDSCAPE

Golf is part of a hyper-competitive sports media rights landscape

TOP TEN SPORTS BY GLOBAL MEDIA RIGHTS VALUE & TENNIS IN 2022 (£ MILLIONS)

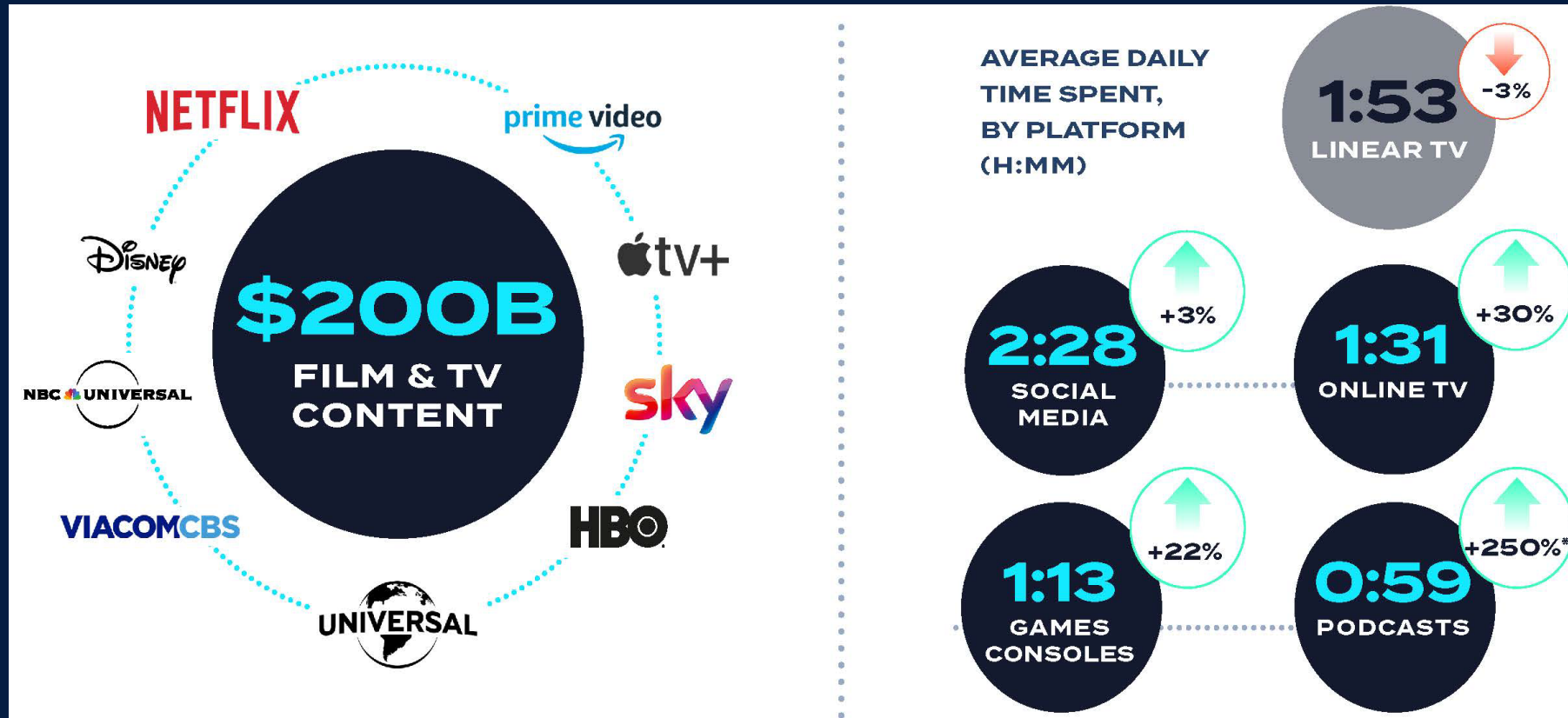


Source: Sport Business



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The battle for attention intensifies



Source: Sport Business, Ampere 2020

Source: GWI, 2018-2022 Since 2019



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Landscape of Sport Sponsorship

The global sport sponsorship market size was estimated at **USD 77.69 billion in 2022**

To reach **USD 116.17 billion by 2027**



Sport Sponsorship Soundbites



Automotive industry leading category for new sport sponsorship deals in 2022



Crypto was driving the market - projected 778% growth between 2021-2026 in sport sponsorship



Growth in interest and investment in women's sport



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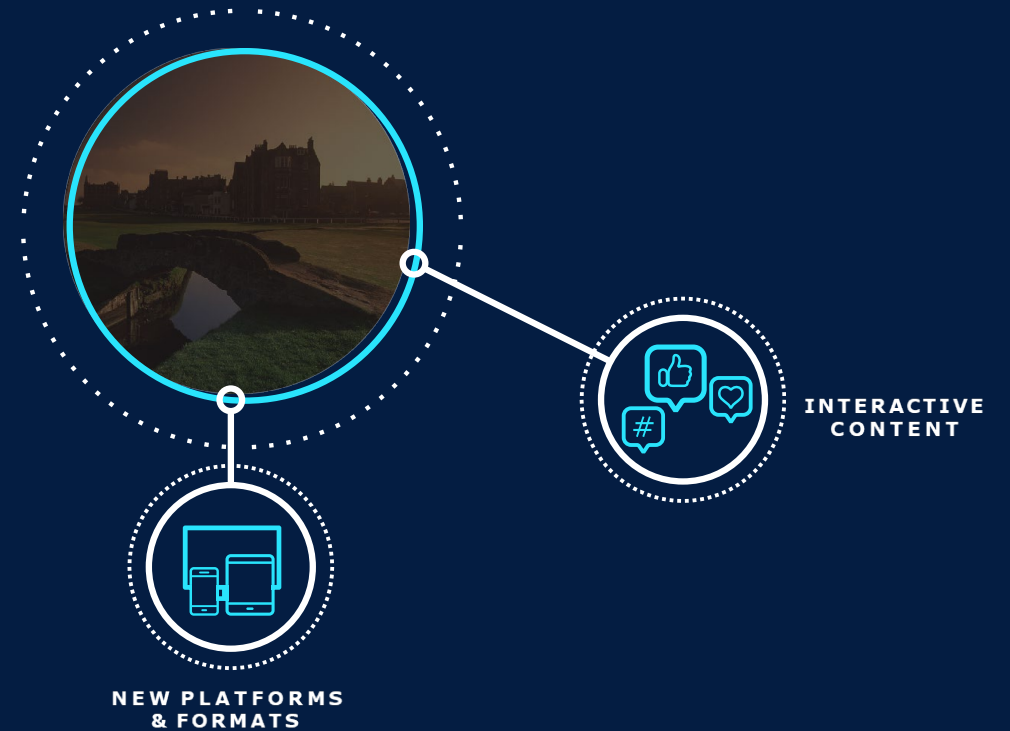
TRENDS

Broadcast Trends

Sports are increasingly going direct-to-consumer



The content landscape is changing



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New Platforms

amazon

NETFLIX

Google



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Partnerships

A move to meaningful, authentic partnerships - away from transactional sponsorships



COMMUNITY



DEI



SUSTAINABILITY



CHARITY



HEALTH &
WELLBEING

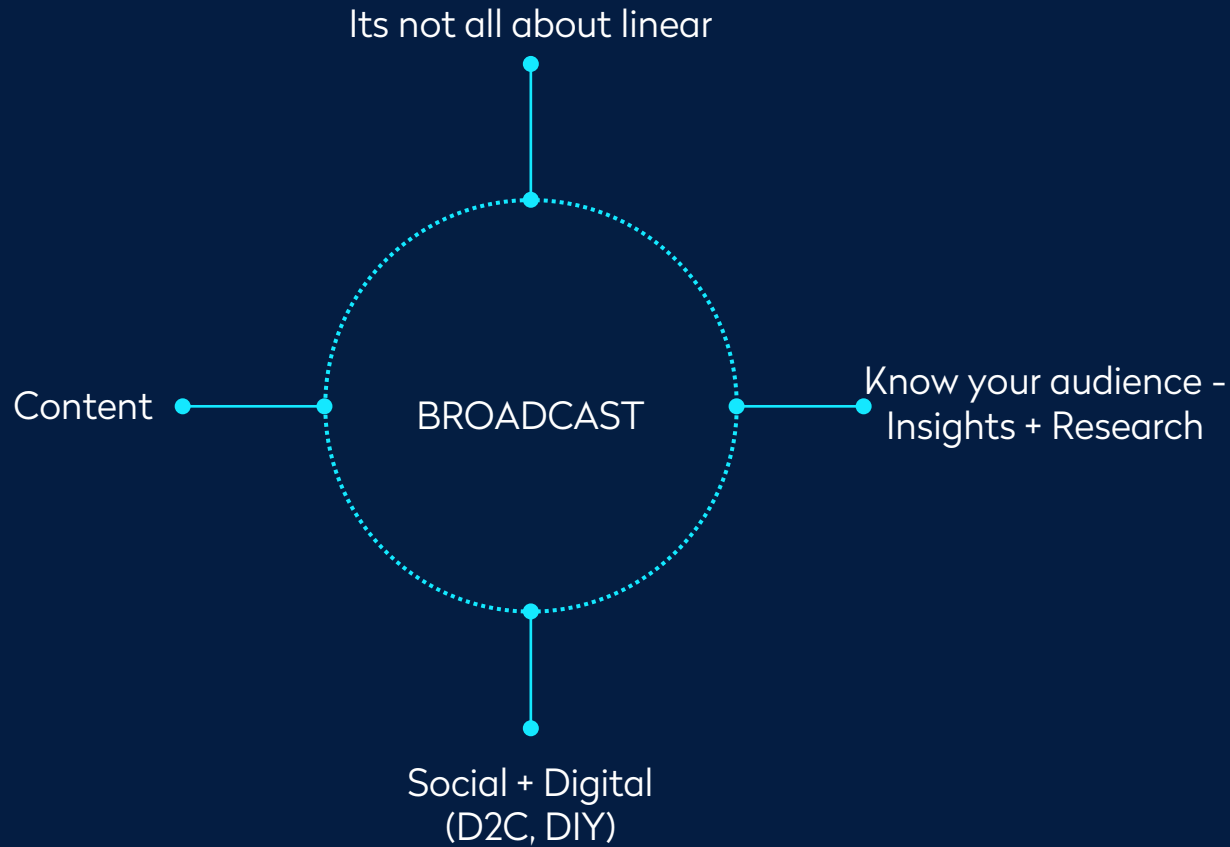


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**WHAT DOES THIS
MEAN FOR YOU?**

Broadcast & Sponsorship Opportunities



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CHARITABLE

PERSEVERANCE INTEGRITY

SPORTSMANSHIP INCLUSIVE

BRAND VALUES

HONESTY RESPECT

RESPONSIBILITY GLOBAL

COURTESY SUSTAINABLE

INNOVATIVE COMMUNITY



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THIS IS
**WHY
GOLF**

SUPPORTED BY



- Impactful and positive narrative for golf
- Amplifying golf's brand values
- Illustrating best practices

www.thisiswhygolf.com



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THIS IS

WHY GOLF

SUPPORTED BY



IN-DEPTH ANALYSIS

GEOGRAPHICAL INSIGHTS
AND RESEARCH



PODCAST



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Key Takeaways

- 01** The world of broadcast and sponsorships is ever evolving
- 02** Broadcasters are looking at how to engage new audiences in an intensifying battle for attention
- 03** Brands are moving away from transactional relationship to authentic and deep partnerships
- 04** At the very highest level within Golf, there is significant funding
- 05** At a federation level, knowing your audience, using your assets to create content and drive social media, and providing opportunities for brands to engage with you and your membership, through meaningful partnerships will create funding and revenue opportunities
- 06** The brand values of golf remain as relevant and strong as ever



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THANK YOU