



European Golf Participation Report.

2019

R&A

EGA
European Golf Association

27%

Proportion of adult golfers
who are female in Europe

34% ↑

Markets growing in Europe*

*Affiliated European markets with growth
in total registered golfers – 2019 v. 2018.

642,240

Registered Golfers in Germany

Achieved #1 market in
Europe for first time in 2019

Introduction from the Chief Executive of The R&A, Martin Slumbers

Welcome to the new participation report from The R&A produced alongside the European Golf Association (EGA).

Having gathered and collated the latest data on European participation to provide an overview of golf across 47 countries, this report offers valuable insight for the industry. The role of national golf federations is core to the growth of participation in European countries, as they develop and extend initiatives to attract new golfers to the game and encourage lapsed golfers to return.

The R&A's Women in Golf Charter, launched in 2018, is a fundamentally important initiative supported by many federations. We look forward to others pledging their commitment to it as we aim to increase the number of women and girls participating in golf and to encourage more opportunities for women to work and volunteer within the golf industry.

To fully understand the impact of these initiatives, it is important to measure and monitor participation amongst all golfers – from the beginner in the sport to the new or established club player and finally to national squad members. The gathering of this data on an annual

basis helps The R&A and the EGA to monitor change, while we are also committed to making this information available to the wider golfing and sporting community.

In recent years, many successful initiatives have helped develop the sport and this report highlights various case studies. For example, in France, the French Golf Federation has opened over 100 short-course or starter-centres as part of its commitment to the successful hosting of the 2018 Ryder Cup at Le Golf National.

This report represents part of our wider work to understand golf participation throughout Europe. I encourage you to read the featured case studies and review the overall data. Enjoy the report.



Martin Slumbers
Chief Executive of The R&A

Introduction from the EGA General Secretary, Richard Heath

The European Golf Association (EGA) has been collecting and collating golf participation statistics from its member national golf federations for many years, with some organisations accessing and using the data for their own purposes, sometimes with conflicting messaging.

In cooperation with The R&A and our members, we have now expanded the range of national data to be acquired, within stricter guidelines, in order to provide a more definitive picture of golf throughout Europe at its different levels of play. We aim to continue the process in the coming years to more accurately analyse trends in European golf participation.

While the EGA is primarily concerned with overseeing its many European title amateur team and individual championships and international matches, as well as golf-handicapping, we recognise the crucial role played by our 47 member federations in managing the sport of golf, with much to be learned from the many cultural frameworks. Consequently, in addition to data analysis presentations, this report presents a number of case studies of the initiatives being undertaken within Europe to grow the game.

In providing this report, and those to follow, it is our goal not only to inform, but to inspire and encourage those leading golf's administration, as well as others with an interest in the sport, to work to progress the game and increase its attraction. As a pastime already enjoyed by so many, golf offers unique opportunities for multi-generational social interaction, connection with the outdoors, environmental conservation, career aspiration and health from physical activity – societal benefits that can be promoted and subsequently better acknowledged and appreciated.

We thank our members for their cooperation in providing their data and The R&A for assisting us to better serve European golf.



Richard Heath
General Secretary of
The European Golf Association

European Golfer Comparative Performance.

With 4.13 million registered golfers and just under 9,000 golf courses in Europe, registered golfers only account for 0.5% of the total population of the affiliated markets – there is a significant opportunity to grow the sport.

There are many initiatives being undertaken across Europe to grow the sport, and this first R&A and EGA produced report on European registered golfers shows that golf has a significant opportunity and positive future for growth.

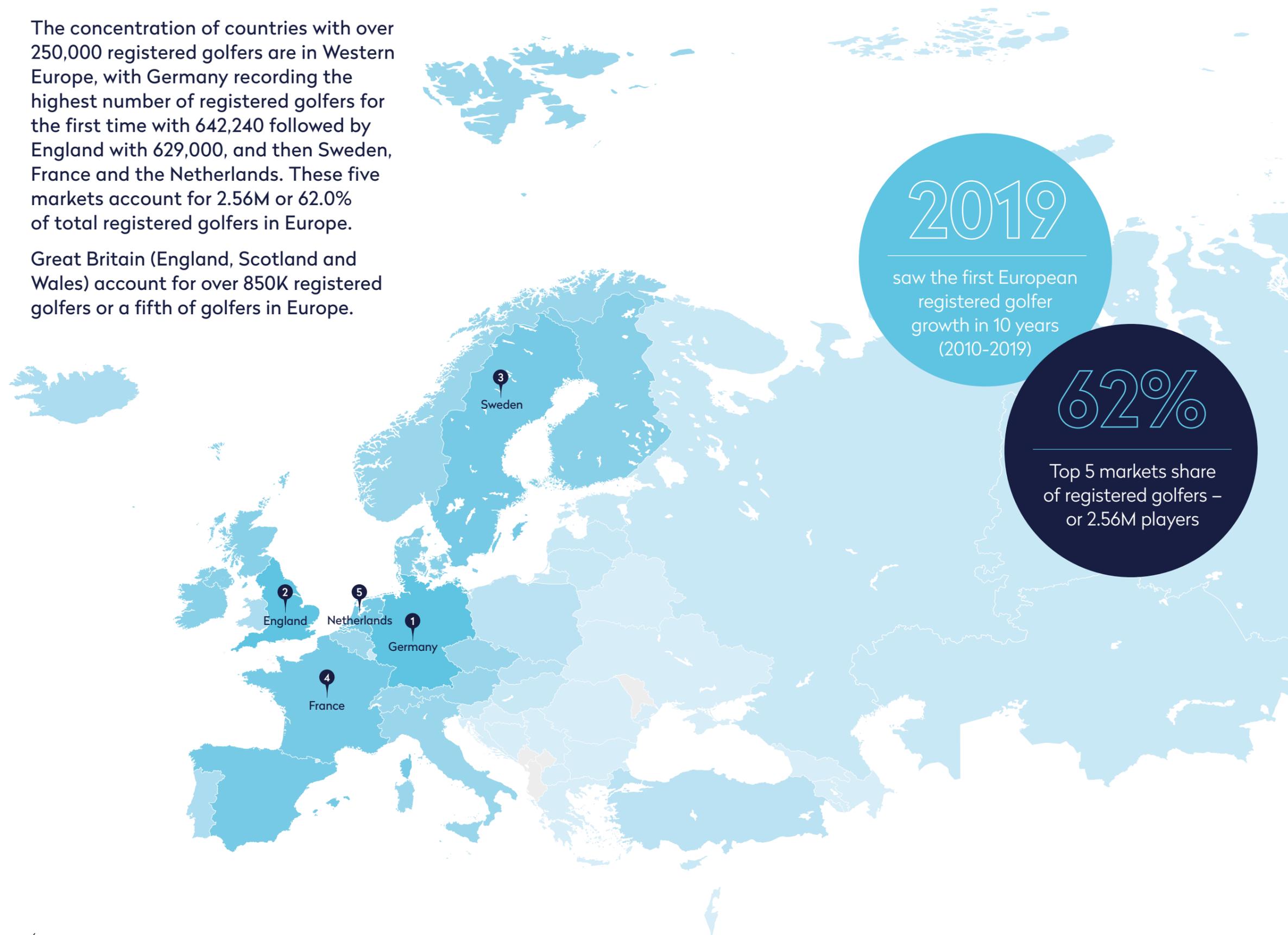
This report looks at the number of registered golfers across the 47 European markets who are members of the EGA and under the governance jurisdiction of The R&A – as well as the total number of courses in each country recorded in the Golf Around the World publication for The R&A and, separately, the number of those courses affiliated to the national federations. Details are also provided for the number of players in national teams and development squads.

There were 34% of federations – or in total 16 markets – who saw an increase in registered golfers in the last 12 months. The report details a number of case studies where participation initiatives have been growing the sport or are in place and have helped in changing the perceptions, attitudes and playing profiles of golfers across Europe. Case studies are included in this report including an analysis of the impact of the 101 short courses, starter centres and practice venues built in France; on moving towards a 50:50 gender split of male and female golfers in Sweden; roving teaching professionals in Iceland; and the adoption of GolfSixes initially in the UK and now across Europe to grow the sport.

Total registered golfers by market 2019.

The concentration of countries with over 250,000 registered golfers are in Western Europe, with Germany recording the highest number of registered golfers for the first time with 642,240 followed by England with 629,000, and then Sweden, France and the Netherlands. These five markets account for 2.56M or 62.0% of total registered golfers in Europe.

Great Britain (England, Scotland and Wales) account for over 850K registered golfers or a fifth of golfers in Europe.



2019
saw the first European registered golfer growth in 10 years (2010-2019)

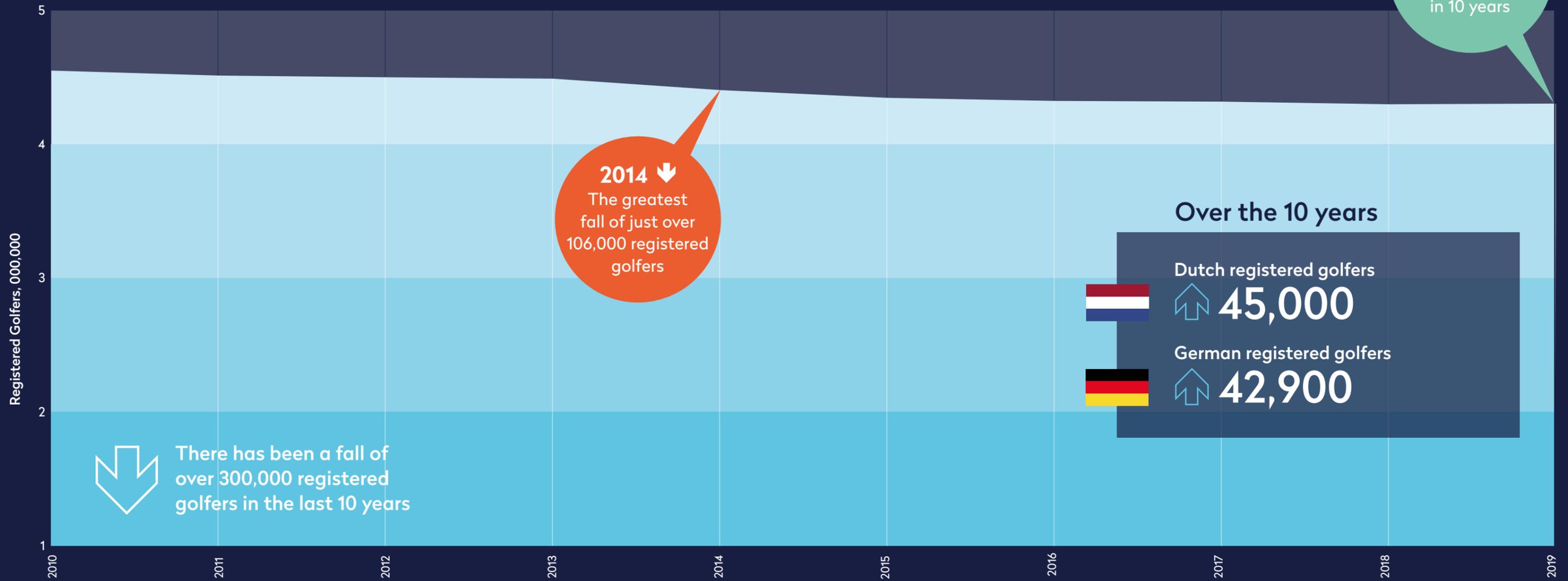
62%
Top 5 markets share of registered golfers – or 2.56M players

Amongst these initiatives, success can be seen with 34% of markets showing an increase in registered golfers between 2018 and 2019. Overall, 2019 saw the cumulative total registered golfers across Europe rise for the first time in ten years. Otherwise, between 2010 and 2019 – there has been almost a decade of decline in registered golfer numbers with a fall of over 300,000 players to a figure of almost 4.13M in 2019.

“...golf is accessible across Europe and does not need to be expensive nor exclusive...”

The R&A and the EGA know that an active involvement in golf can occur in many different formats and at many different venues – from driving ranges, to pitch & putt courses; from adventure golf to indoor golf simulators; as well as initiatives to play on full length golf courses from six holes, to nine holes or to a full 18-holes as well as other local options in between. Whilst there are 8,991 golf courses in these European countries affiliated to the EGA – there are many other golf facilities, as detailed above, being used which embrace golf’s many different formats as well as being open to golfers of differing skill levels. Broadly speaking, golf is accessible across Europe and does not have to be expensive or exclusive to those wishing to play the sport.

Change in total registered golfers in Europe over the last 10 years (2010-2019).



7%

% decrease over the last 10 years (2010-2019)

Total registered golfers in Europe has fallen by over 300,000 from 4.44m to 4.13m in the last ten years. Growth was seen by the Netherlands of 13% (up 45,000 golfers) and in Germany of 7% (up 42,912 golfers). The largest declines were seen in Ireland, who saw a fall of 29% or almost 75,000 golfers, in Scotland with a fall of 26% golfers (down 65,000) and in England a fall of almost 22% (down over 176,000).

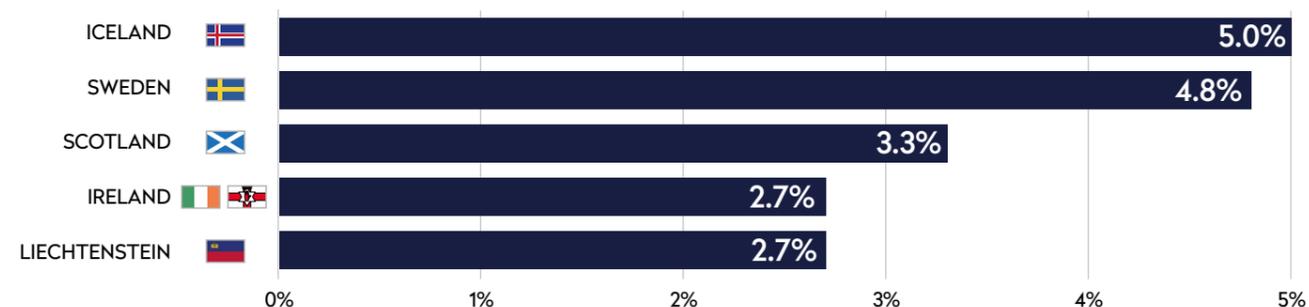
Many emerging markets in Eastern Europe saw increases in registered golfers over the ten years.

Bulgaria	↑ 367%
Croatia	↑ 26%
Estonia	↑ 40%
Kazakhstan	↑ 155%
Latvia	↑ 114%
Lithuania	↑ 215%
Poland	↑ 116%
Russia	↑ 348%
Serbia	↑ 135%

Percentage of markets showing change in total registered golfers – 2019 v. 2018



Top five markets for total registered golfers as a percentage of the population.



The percentage of registered golfers as a proportion of the population in each country remains relatively low across Europe with only eight markets having more than 2% of the national population registered as golfers with the national federation. Iceland has the greatest up-take with 5.0% of the population, closely followed by Sweden with 4.8%. Scotland and Ireland also register 3.3% and 2.7% respectively, and other markets with over 2.0% of the population registered with the national federation include the established golf markets of Denmark, Finland and the Netherlands.

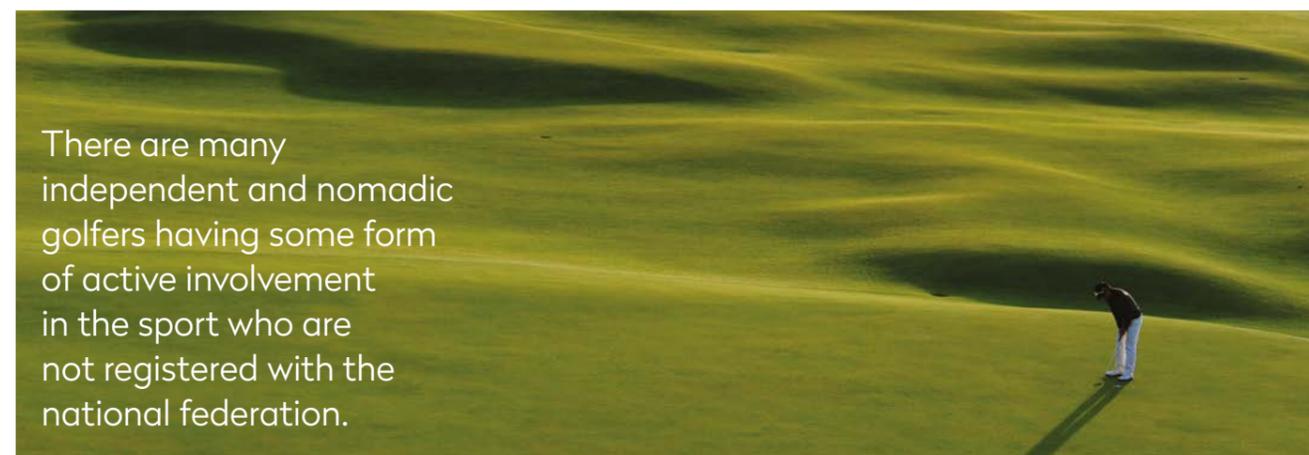
However, it should be noted that there are many other golfers having some form of active involvement in the sport who are not registered

with the national federation. These golfers may only play as independent or nomadic golfers as their frequency of play either does not merit joining a golf club, or they prefer not to be attached to a single venue. In developed golf markets, those independent or nomadic golfers who do play on a full length golf course may outnumber those golfers registered to the federation. Independents play their golf through paying a green fee at different golf courses in their own market, or when playing in another country on a golfing break or holiday. There will also be a number of golfers whose active involvement in golf is through driving ranges, par 3 courses, pitch & putt, adventure golf putting experiences or indoor golf

simulators. All of these activities get potential players into a golf environment and expose them to the fundamentals of the game and are legitimate channels to recruit and bring new golfers into the sport.

5%

Registered golfer proportion of the national populations in Iceland and Sweden



Player demand on golf courses – average total registered golfers per golf course.

Highest player demand – Top 5	
Netherlands	1,179
Switzerland	783
Sweden	732
Finland	729
Luxembourg	678

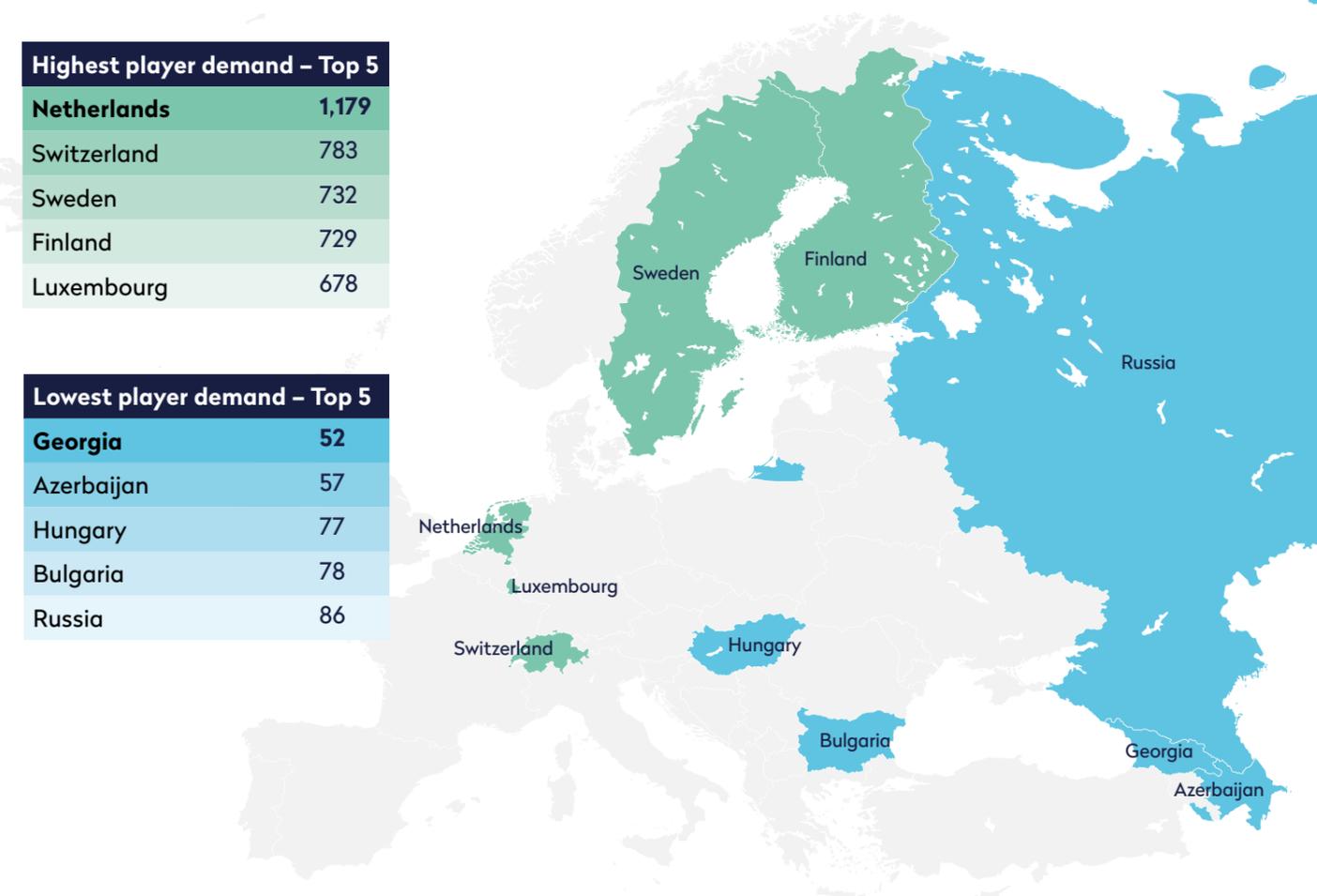
Lowest player demand – Top 5	
Georgia	52
Azerbaijan	57
Hungary	77
Bulgaria	78
Russia	86

There is significant variation on the demand on golf courses in each market from the total registered golfers. This is influenced by the level of golf development in the country, as well as the number of facilities and golf courses that have been built. In many of the newer eastern European golfing countries there appears to be a sufficient capacity to absorb a substantial growth in registered players – in Russia there are only 86 registered golfers per course, 57 in Azerbaijan, and only 52 in Georgia. In comparison, there are 11 markets where there are over 500 registered golfers per course – with only the Netherlands having more than 1,000 golfers for each golf course.

There are a number of markets where the usage is also not dictated by the domestic golfing market only but where golf tourism and the commercial benefits of inbound golf expenditure has impacted on the number of courses in existence – for example, Portugal only has 144 registered golfers per course, Turkey has 204, Croatia has 99 and Bulgaria has 78.

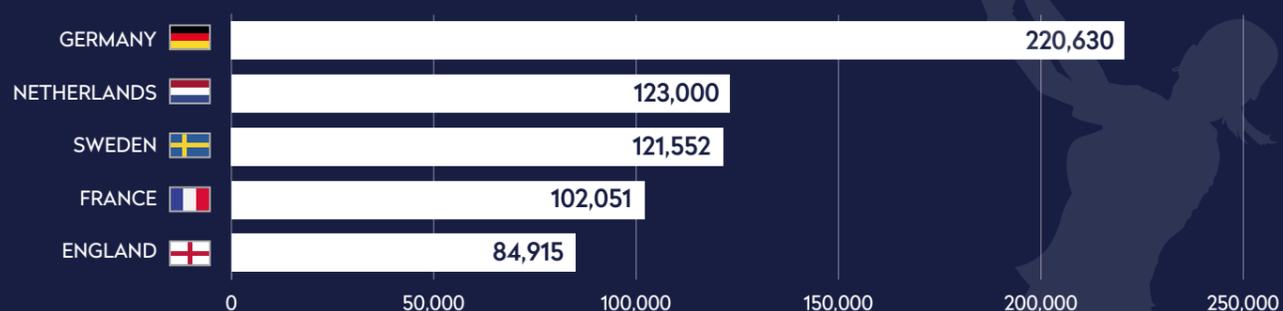
There are also some markets where the golf inventory was built when the sport's penetration in terms of registered golfers was significantly higher than currently. For example, Scotland – often described as the 'home of golf' – only has 294 registered golfers for each golf course in the country.

There is also a difference in the levels of independent or nomadic golfers in many of the markets who play the sport without being affiliated to the national federation – particularly in some developed markets like England and Scotland where the number of golfers in the population is more than double the number of players registered to the national federation. This is often a reflection of the different historical or cultural relationship that golfers have with the sport in these countries.

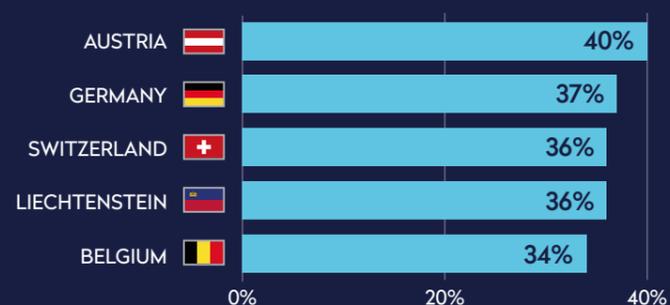


Female and junior golf

Top five markets for total number of adult female golfers.



Top five markets for female golfers as a percentage of total adult golfers.



27%

Adult registered female golfers as a proportion of total adult golfers in Europe

There are many initiatives to ensure that golf is inclusive, welcoming and a family sport. In many established golf markets, the game has been seen as predominantly male in terms of player profiles, and this is being addressed with programmes to attract more women and children to play golf, and ensure that programmes to introduce children to the game are encouraged.

The R&A has launched a Women in Golf Charter to provide a framework and strategic intention to ensure that national federations, golf clubs, golf venues and the golf industry encourage women and girls to be actively involved and represented across all levels of the sport.

Whilst the Women in Golf Charter has not yet impacted significantly on levels of female participation,

there are some markets where the balance of gender participation is much more equal and where the levels of junior playing numbers are significant. In particular this can be seen in some of the newer or emerging golf countries.

There are 14 national federations where registered female golfers account for 30% or more of total adult golfers – which is also 30% of EGA member countries. The Austrian Golf Association leads the way with 40% of registered players being female followed by the German Golf Federation. One of the case studies details how Sweden has launched Vision 50/50 to develop levels of female participation and achieve equality at 50% of players. At the moment, Sweden is ranked equal 17th in Europe with 28% of its adult registered players

being female, but as the initiative demonstrates, Vision 50/50 is beginning to have a positive impact.

The markets that currently have the highest proportion of male golfers are Latvia (91%), Azerbaijan (89%) and Israel (88%). However, in the UK, which has a highly developed golf market, there remain significant opportunities to attract more female adult registered players as only 13% of players are female in Scotland and Wales, and only 14% of adult registered players in England.

There are a total of just over 1.03m women players in Europe, with only four markets each having more than a hundred thousand registered players – Germany, Netherlands, Sweden and France – accounting for 55% of adult female registered golfers in Europe.

There are over 300,000 registered junior golfers in Europe who account for 7.5% of total golfers. There remain significant opportunities to attract more young people to play golf and be embraced as part of this important family sport across the affiliated markets.

Golf is relatively unique as it is one of the few sports where competitive or social games can be played inter-generationally – and where the social, health and sporting behaviour benefits can be shared between age-groups and taught alongside the disciplines of keeping the score and self-policing on the rules.

The emerging golf markets have the highest proportion of junior golfers. They comprise over 40% of Armenia and Turkey's total registered

participants, and over 15% of eight other affiliated markets.

Whilst the markets with the highest number of junior golfers – namely Sweden (46,844), Germany (41,405) and France (39,459) – appear to have a significant absolute number of junior registered players, they only account for 9.7%, 6.5% and 9.6% respectively of their total national registered golfers. The opportunity to increase the overall proportion of junior players in these developed markets is substantial. There are many initiatives to grow the junior game further, which is needed for the long term health of the sport. They include the case study outlining the GolfSixes Leagues and tournaments initiated in the UK and run by The Golf Foundation charity.

The format is being embraced in many other markets as well as in co-sanctioned tournaments competed on the European and Ladies European Tours.

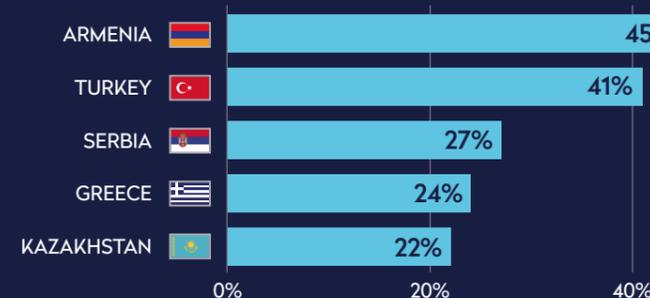
Younger players may start the game through adventure golf, mini-golf, par 3 or pitch & putt – and these are all established entry points to the sport – but it is the transition into regular play and junior membership that is important for the future growth and development of golf.

The ffgolf case study illustrates how the establishment of 101 short-courses, driving-ranges and starter centres with a focus on urban locations is also succeeding in attracting younger and new golfers to the sport.

Top five markets for total number of junior golfers.



Top five markets for junior golfers as a percentage of total golfers.



7.5%

Junior golfers as a proportion of total registered golfers in Europe

Golf courses

Of the 8,991 golf courses in Europe – made up of 9-hole, 18-hole and other dedicated golf facilities – 60.1% of them or exactly 5,400 courses are concentrated in five established markets – England, Germany, France, Sweden and Scotland. Across Europe, the average number of total registered golfers per course is 460 players with 12 markets or 26% of the affiliated countries having greater

player pressure on their full length course inventory – the Netherlands leads the way with 1,179 players per course followed by Switzerland at 783, Sweden (732), Finland (728) and Luxembourg (678). This shows the player demand in Scandinavia and central Europe. In comparison, there are 19 markets or 40% of affiliated countries who have fewer than 200 golfers per golf course.

Top five markets for number of golf courses (Golf Around the World).



Golf around the world

In some cases, the number of golf courses affiliated to each federation is different to the total inventory of golf courses as detailed in The R&A's Golf Around the World publication. This R&A initiative, working with the US-based National Golf Foundation, has been monitoring the number of golf courses around the world – that have over 6 holes per venue – for many years.

In order to ensure consistency of reporting across the markets in The R&A's jurisdiction, the Golf Around the World golf course numbers have been used in the calculation of the registered golfers per course in Europe.

In the federation statistics section, details have been provided by the national federations on the number of 18-hole, 9-hole and other golf courses affiliated to the federation. These numbers may not correlate completely with the total number of golf courses in each country as identified by Golf Around the World.

6-hole and 9-hole courses

There have been a number of initiatives – such as the establishment of 101 compact golf courses and starter centres by ffgolf in France – to encourage accessibility to the sport through reducing the time taken to play golf, through the promotion of 'ready

8,991

Golf courses in Europe (Golf Around the World)

460

Average number of total registered golfers per golf course in Europe

7

Affiliated countries with over 400 golf courses in Europe

Golf's bright future



This is the first report from The R&A and EGA on affiliated markets in Europe monitoring registered golfers, total golf facilities and golf courses and includes national federation contact information. It is an important landmark in understanding the state of golf from the affiliates' perspective and, whilst this has focused on Europe, golf is a truly global sport. Collating the information on a wider basis to understand the state of golf internationally is an important challenge.

Whilst total registered golfers are only 0.5% of the European population of over 871m, this does

not include those independent or nomadic golfers who may play either on a golf course or who actively take part in golf through driving ranges, golf simulators, pitch & putt or other forms of the game. These players add substantially to those who would be termed 'Golf Actives' in Europe. The sport employs many thousands of individuals in the industry, and consistently contributes over €15.1 billion⁽¹⁾ to the European economy. The potential exists to grow the sport further and increase per capita participation towards the rates seen in Scotland, Sweden or Iceland of greater than 3%.

There are also challenges and opportunities to grow women and girls participation and the family sport – and whilst Sweden's Vision 50/50 case study may still be short of its target, 14 markets have shown rates above 30% to be achievable – and a further 18 are already at levels of 20% to 30% adult women players.

The case studies in this report demonstrate routes to grow the sport and develop the game as a family activity in each market – and we hope these successes will inspire golfers, golf venues, and national federations to embrace the sport further and ensure golf continues to grow as a 'sport for life'.



14

Affiliated EGA countries with female participation above 30%

Federation Statistics.

The R&A and the EGA are working closely with 47 affiliates across Europe to develop and sustain golf as an active and growth sport. Details on the national golf federations for each country follow – including their contact information and key individuals – as well as statistics on registered golfers in each country, change in this player number over the last five years and a summary of golf courses in each market – the totals recorded from the Golf Around the World brochure and those that are affiliated to the federation.

Andorra

ANDORRAN GOLF FEDERATION

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President: Xavier Espot Miró
CEO / Secretary: Arjan Jethani

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-
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77,006

Total population

445 / 0.6%

Registered golfers / % of population

Registered golfers – change over time



223

Registered golfers per course (Golf Around the World courses)

66.0% ↑ **463.3%** ↑
% Change ('19 v '18) % Change ('19 v '15)

7

National squad / elite player & development squad golfers

325 / 80%

Adult male registered golfers / % of adult registered golfers

80 / 20%

Adult female registered golfers / % of adult registered golfers

40 / 9%

Junior registered golfers / % of total registered golfers

2

Total golf courses (Golf Around the World)

1 / 1

Total affiliated golf courses 9-hole / 18-hole

0

Other affiliated golf courses (multi-hole combinations)

Armenia

NATIONAL GOLF ASSOCIATION OF ARMENIA

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CEO / Secretary: -

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2,951,776

Total population

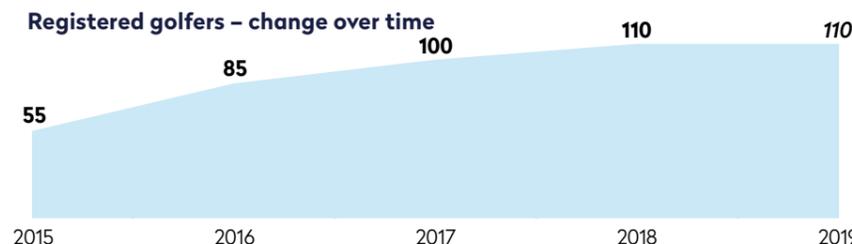
110 / 0.0%

Registered golfers / % of population

110

Registered golfers per course (Golf Around the World courses)

Registered golfers – change over time



0.0%

% Change ('19 v '18)

100.0% ↑

% Change ('19 v '15)

0

National squad / elite player & development squad golfers

45 / 75%

Adult male registered golfers / % of adult registered golfers

15 / 25%

Adult female registered golfers / % of adult registered golfers

50 / 45%

Junior registered golfers / % of total registered golfers

1

Total golf courses (Golf Around the World)

1 / 0

Total affiliated golf courses 9-hole / 18-hole

0

Other golf courses (multi-hole combinations)

Austria

AUSTRIAN GOLF ASSOCIATION

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President: Dr. Peter Enzinger
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AUSTRIAN GOLF ASSOCIATION
www.golf.at

8,847,037

Total population

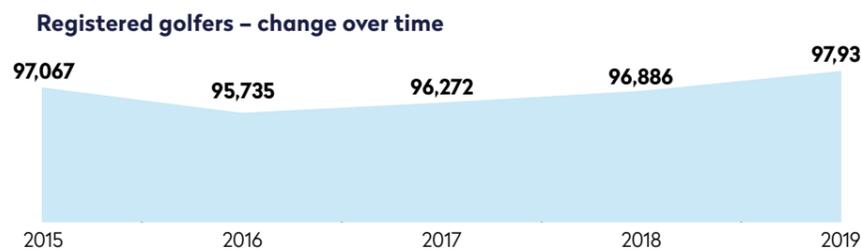
97,930 / 1.1%

Registered golfers / % of population

478

Registered golfers per course (Golf Around the World courses)

Registered golfers – change over time



1.1% ↑

% Change ('19 v '18)

0.9% ↑

% Change ('19 v '15)

70

National squad / elite player & development squad golfers

53,649 / 60%

Adult male registered golfers / % of adult registered golfers

35,174 / 40%

Adult female registered golfers / % of adult registered golfers

9,107 / 9%

Junior registered golfers / % of total registered golfers

205

Total golf courses (Golf Around the World)

57 / 82

Total affiliated golf courses 9-hole / 18-hole

21

Other golf courses (multi-hole combinations)

Azerbaijan



AZERBAIJAN GOLF FEDERATION

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CEO / Secretary: -

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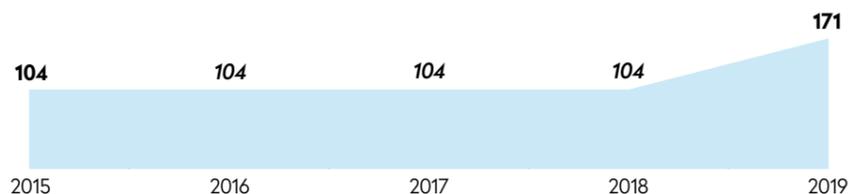


9,942,334
Total population

171 / 0.0%
Registered golfers / % of population

57
Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



64.4% ↑ % Change ('19 v '18) **64.4% ↑** % Change ('19 v '15)

0
National squad / elite player
& development squad golfers

136 / 89%
Adult male registered golfers
/ % of adult registered golfers

17 / 11%
Adult female registered golfers
/ % of adult registered golfers

18 / 11%
Junior registered golfers
/ % of total registered golfers

3
Total golf courses
(Golf Around the World)

0 / 2
Total affiliated golf courses
9-hole / 18-hole

2
Other golf courses
(multi-hole combinations)

Belarus



BELARUSIAN GOLF FEDERATION

Surganov st., 2, Office 6, Minsk

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President: Vladimir Drazhin
CEO / Secretary: Anatoli Ivanov

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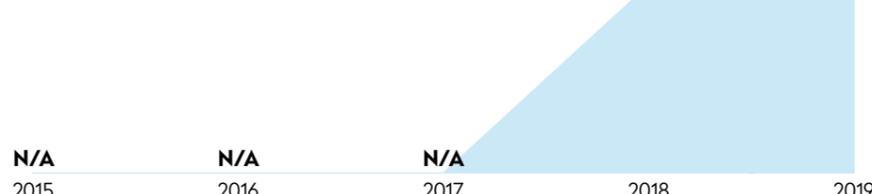


9,485,386
Total population

176 / 0.0%
Registered golfers / % of population

88
Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



N/A % Change ('19 v '18) **N/A** % Change ('19 v '15)

19
National squad / elite player
& development squad golfers

125 / 83%
Adult male registered golfers
/ % of adult registered golfers

25 / 17%
Adult female registered golfers
/ % of adult registered golfers

26 / 15%
Junior registered golfers
/ % of total registered golfers

2
Total golf courses
(Golf Around the World)

0 / 1
Total affiliated golf courses
9-hole / 18-hole

0
Other golf courses
(multi-hole combinations)

Belgium



ROYAL BELGIAN GOLF FEDERATION

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President: Emmanuel Rombouts
CEO / Secretary: Timothée Simoens

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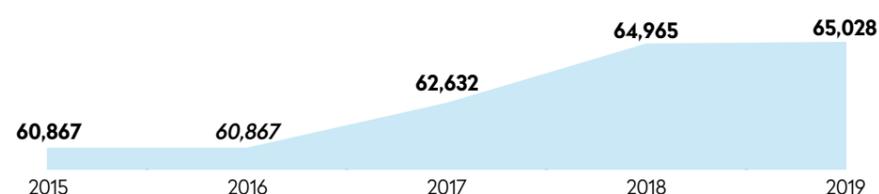


11,422,068
Total population

65,028 / 0.6%
Registered golfers / % of population

537
Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



0.1% ↑ % Change ('19 v '18) **6.8% ↑** % Change ('19 v '15)

0
National squad / elite player
& development squad golfers

38,442 / 66%
Adult male registered golfers
/ % of adult registered golfers

19,881 / 34%
Adult female registered golfers
/ % of adult registered golfers

6,705 / 10%
Junior registered golfers
/ % of total registered golfers

121
Total golf courses
(Golf Around the World)

23 / 52
Total affiliated golf courses
9-hole / 18-hole

16
Other golf courses
(multi-hole combinations)

Bosnia and Herzegovina



GOLF ASSOCIATION BOSNIA AND HERZEGOVINA

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President: Jasmin Selmanagic
CEO / Secretary: -

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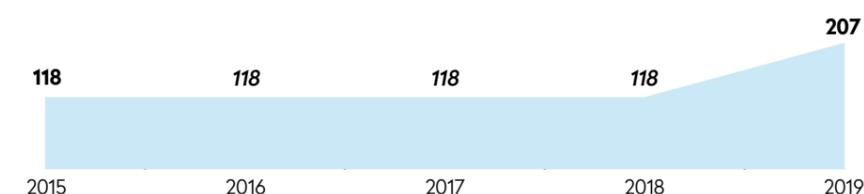


3,323,929
Total population

207 / 0.0%
Registered golfers / % of population

104
Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



75.4% ↑ % Change ('19 v '18) **75.4% ↑** % Change ('19 v '15)

0
National squad / elite player
& development squad golfers

135 / 81%
Adult male registered golfers
/ % of adult registered golfers

32 / 19%
Adult female registered golfers
/ % of adult registered golfers

40 / 19%
Junior registered golfers
/ % of total registered golfers

2
Total golf courses
(Golf Around the World)

2 / 0
Total affiliated golf courses
9-hole / 18-hole

9
Other golf courses
(multi-hole combinations)

Bulgaria



BULGARIAN GOLF ASSOCIATION

19 Oborishte Street, - 1504, Sofia, Bulgaria

s.underwood@golfbg.net
+35929430610
www.golfbg.com

President: Krassimir Guergov
CEO / Secretary: Seth Underwood

/bulgariangolfassociation
-
-

7,024,216

Total population

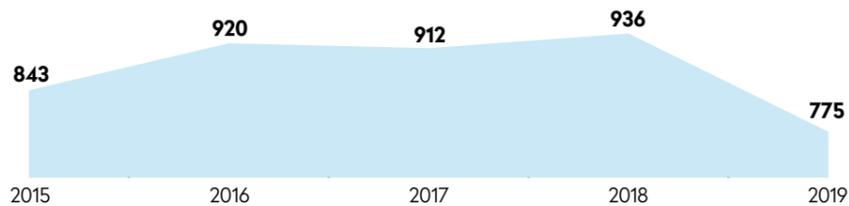
775 / 0.0%

Registered golfers / % of population

78

Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



-17.2% ↓ % Change ('19 v '18) **-8.1%** ↓ % Change ('19 v '15)

23

National squad / elite player & development squad golfers

568 / 82%

Adult male registered golfers / % of adult registered golfers

128 / 18%

Adult female registered golfers / % of adult registered golfers

79 / 10%

Junior registered golfers / % of total registered golfers

10

Total golf courses
(Golf Around the World)

0 / 6

Total affiliated golf courses
9-hole / 18-hole

0

Other golf courses
(multi-hole combinations)

Croatia



CROATIAN GOLF ASSOCIATION

Trg Kresimira Cosica 11, - 10000, Zagreb, Croatia

office@golfportal.hr
+38513091035
www.golfportal.hr

President: Emilijo Zubrinic
CEO / Secretary: Sonja Jelaca

/HGScrogolf
-
-

4,089,400

Total population

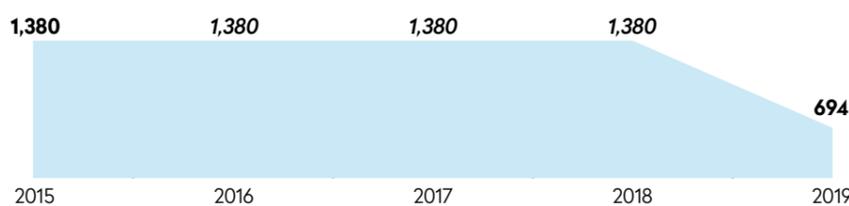
694 / 0.0%

Registered golfers / % of population

99

Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



-49.7% ↓ % Change ('19 v '18) **-49.7%** ↓ % Change ('19 v '15)

7

National squad / elite player & development squad golfers

512 / 80%

Adult male registered golfers / % of adult registered golfers

128 / 20%

Adult female registered golfers / % of adult registered golfers

54 / 8%

Junior registered golfers / % of total registered golfers

7

Total golf courses
(Golf Around the World)

2 / 3

Total affiliated golf courses
9-hole / 18-hole

1

Other golf courses
(multi-hole combinations)

Cyprus



CYPRUS GOLF FEDERATION

Olympic House, Amfipoleos 21, Office B208 - 2025, Nicosia, Cyprus

cgf@cgf.org.cy
+35722449874
www.cgf.org.cy

President: Demetris Papapetrou
CEO / Secretary: Nick Rossides

/CyprusGolfFederation
@CyprusGolf
-

1,189,265

Total population

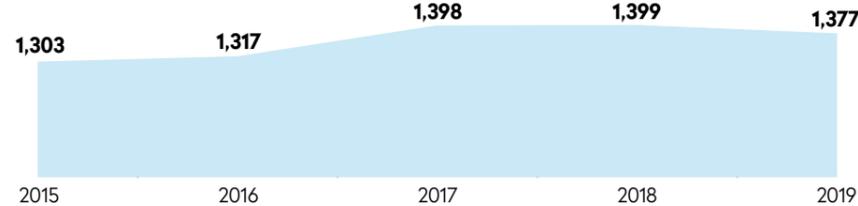
1,377 / 0.1%

Registered golfers / % of population

153

Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



-1.6% ↓ % Change ('19 v '18) **5.7%** ↑ % Change ('19 v '15)

0

National squad / elite player & development squad golfers

974 / 75%

Adult male registered golfers / % of adult registered golfers

329 / 25%

Adult female registered golfers / % of adult registered golfers

74 / 5%

Junior registered golfers / % of total registered golfers

9

Total golf courses
(Golf Around the World)

0 / 8

Total affiliated golf courses
9-hole / 18-hole

0

Other golf courses
(multi-hole combinations)

Czech Republic



CZECH GOLF FEDERATION

Erpet Golf Centre, Strakonickã 2860 - 150 00, Prague 5 - Smichov, Czech Republic

cgf@cgf.cz
+420296373111
www.cgf.cz

President: Zdenek Kodejs
CEO / Secretary: Ales Libecajt

/cgf.cz
@czechgolf
/cesky.golf

10,625,695

Total population

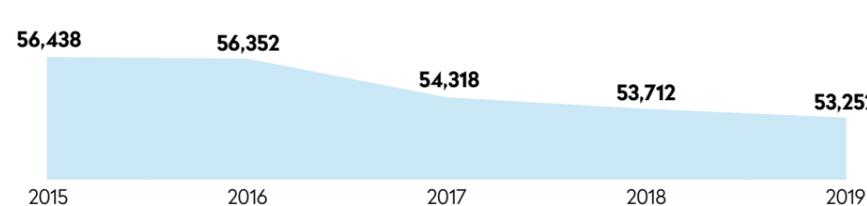
53,252 / 0.5%

Registered golfers / % of population

403

Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



-0.9% ↓ % Change ('19 v '18) **-5.6%** ↓ % Change ('19 v '15)

45

National squad / elite player & development squad golfers

32,734 / 70%

Adult male registered golfers / % of adult registered golfers

13,923 / 30%

Adult female registered golfers / % of adult registered golfers

6,595 / 12%

Junior registered golfers / % of total registered golfers

132

Total golf courses
(Golf Around the World)

56 / 53

Total affiliated golf courses
9-hole / 18-hole

5

Other golf courses
(multi-hole combinations)

Denmark

DANSK GOLF UNION

Idraettens Hus, Broendby Stadion 20 - 2605, Broendby, Denmark

info@dgu.org
+4543262700
www.danskgolfunion.dk

President: Lars Broch Christensen
CEO / Secretary:
Morten Backhausen

f -
t -
/danskgolfunion

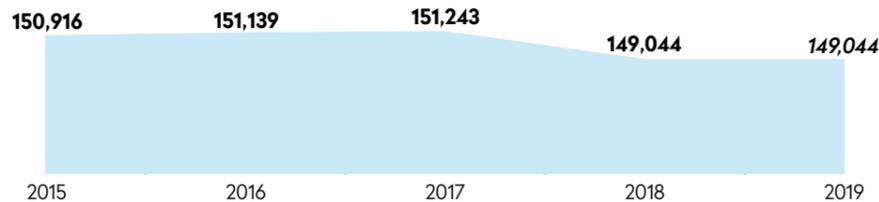


5,797,446
Total population

149,044 / 2.6%
Registered golfers / % of population

431
Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



0.0% **-1.2%** ↓
% Change ('19 v '18) % Change ('19 v '15)

45
National squad / elite player
& development squad golfers

100,037 / 70%
Adult male registered golfers
/ % of adult registered golfers

42,001 / 30%
Adult female registered golfers
/ % of adult registered golfers

7,006 / 5%
Junior registered golfers
/ % of total registered golfers

346
Total golf courses
(Golf Around the World)

17 / 148
Total affiliated golf courses
9-hole / 18-hole

24
Other golf courses
(multi-hole combinations)

England

ENGLAND GOLF

The National Golf Centre, The Broadway, Woodhall Spa, Lincolnshire LN10 6PU, England

j.egan-wyer@englandgolf.org
+441526354500
www.englandgolf.org

President: Jenny Clink
CEO / Secretary: -

/EnglandGolf
@EnglandGolf
/england.golf

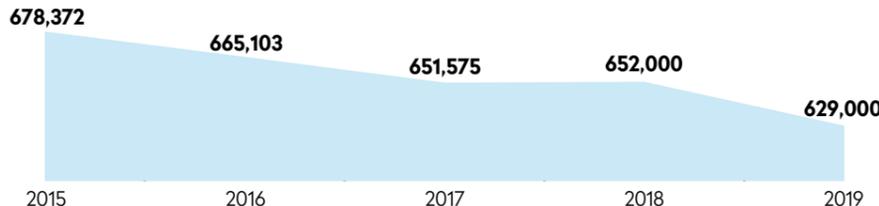
 ENGLANDGOLF

55,977,200
Total population

629,000 / 1.1%
Registered golfers / % of population

277
Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



-3.5% ↓ **-7.3%** ↓
% Change ('19 v '18) % Change ('19 v '15)

35
National squad / elite player
& development squad golfers

525,215 / 86%
Adult male registered golfers
/ % of adult registered golfers

84,915 / 14%
Adult female registered golfers
/ % of adult registered golfers

18,870 / 3%
Junior registered golfers
/ % of total registered golfers

2,270
Total golf courses
(Golf Around the World)

296 / 1,844
Total affiliated golf courses
9-hole / 18-hole

N/A
Other golf courses
(multi-hole combinations)

FINLAND

Collaborate to progress: Finnish Golf

Finnish Golf, the new umbrella name for the four key organisations leading golf in Finland, incorporates a new working cooperation between them – the Finnish Golf Union, Finnish Golf Course Owners Association, Finnish Golf Managers Association and the Finnish PGA – all located, since 2018, under the same roof in The Finnish House of Golf.

With a realisation of being stronger together across many areas of work – especially in marketing, communication and growing participation and the introduction of new golfers to the sport – expertise is now shared through collaboration.

All four stakeholders recognised the opportunity to build trust and grow meaningful collaboration between the parties.

The Finnish House of Golf co-operation forum was also established, with the Presidents and General Secretaries of all four partners meeting four times per year. Having reviewed the current state of the game and pressing issues, the forum then focused on more strategic themes and opportunities.

“Trust is even more valuable than money in a bank account. By working together the meetings and conversations were immediately more direct, more spontaneous and more actionable. We worked together side-by-side and made decisions. We had certain economies of scale working this way, but also a relaxed atmosphere, lots of laughs and cooperation which all drive to achieving results.”
Juha Korhonen, General Secretary, Finnish Golf Union.



From left to right: Juha Korhonen (General Secretary – Finnish Golf Union), Teemu Laakso (CEO – Finnish PGA) and Antti Hiltunen (CEO – Finnish Golf Managers Association (FGMA) and Finnish Golf Course Owners (SGK))

“Each of the parties were committed to find a common goal – and then to achieve this common goal of developing Finnish Golf together. Because we had the same focus – nobody had to make big compromises. It was vital for golf’s sporting future to work together.”

Juha Korhonen, General Secretary, Finnish Golf Union

This significant focus on partnership-working between stakeholders also reflects the nature of golf development in a progressive golfing nation who have embraced and continue to pilot innovative ideas. These include; Park Golf, Functional Parents Nights (offering children, parents and teachers fun golf experiences and links to local clubs) and the national plan for Multigolf Courses.

Now a new “Finnish Golf Strategy” is being developed together. Focus areas include: player loyalty and satisfaction; digitalisation and business intelligence within golf; sustainability and environmental issues; as well as employee experience for people who work in golf. The focus on all these initiatives will be to grow the sport of golf, and to do it with energy and focus. The key and route to achieving real success will be the co-operation of the stakeholders who make up a rejuvenated Finnish Golf.

Estonia



ESTONIAN GOLF ASSOCIATION

Audentese Spordikeskus, Tondi 84 - 11316, Tallinn, Estonia

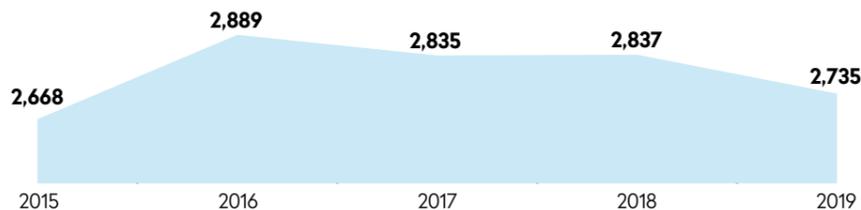
info@golf.ee President: Ekri Mölder /Golffiliit
 +3725280120 CEO / Secretary: Kristo Raudam -
 www.golf.ee /eestigolfiit

1,320,884
Total population

2,735 / 0.2%
Registered golfers / % of population

274
Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



-3.6% ↓ % Change ('19 v '18) **2.5%** ↑ % Change ('19 v '15)

12
National squad / elite player & development squad golfers

1,810 / 70%
Adult male registered golfers / % of adult registered golfers

767 / 30%
Adult female registered golfers / % of adult registered golfers

158 / 6%
Junior registered golfers / % of total registered golfers

10
Total golf courses
(Golf Around the World)

3 / 7
Total affiliated golf courses
9-hole / 18-hole

3
Other golf courses
(multi-hole combinations)

Finland



FINNISH GOLF UNION

Valimotie 10, - 00380, Helsinki, Finland

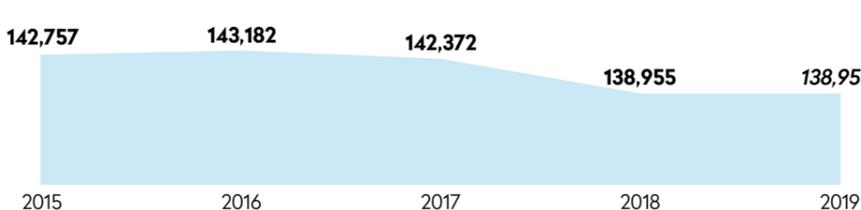
office@golf.fi President: Hanna Hartikainen /Golffliitto
 +358405305733 CEO / Secretary: Juha Korhonen @golffliitto
 www.golf.fi /golffliitto

5,518,050
Total population

138,955 / 2.5%
Registered golfers / % of population

728
Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



0.0% % Change ('19 v '18) **-2.7%** ↓ % Change ('19 v '15)

50
National squad / elite player & development squad golfers

88,620 / 70%
Adult male registered golfers / % of adult registered golfers

37,168 / 30%
Adult female registered golfers / % of adult registered golfers

13,167 / 9%
Junior registered golfers / % of total registered golfers

191
Total golf courses
(Golf Around the World)

52 / 115
Total affiliated golf courses
9-hole / 18-hole

3
Other golf courses
(multi-hole combinations)

France



FRENCH GOLF FEDERATION

68, rue Anatole France, - 92309, Levallois-Perret Cedex, France

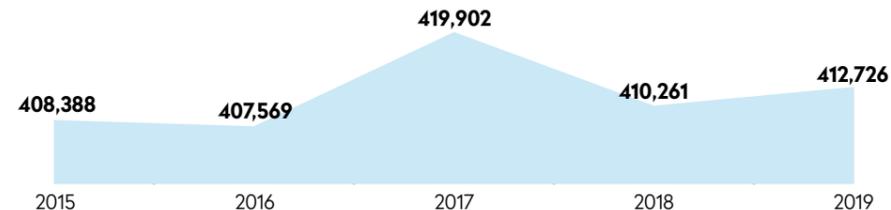
ffgolf@ffgolf.org President: Jean-Lou Charon /ffgolf
 +33141497700 CEO / Secretary: Christophe Muniesa @ffgolf
 www.ffgolf.org /ffgolf

66,987,244
Total population

412,726 / 0.6%
Registered golfers / % of population

513
Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



0.6% ↑ % Change ('19 v '18) **1.1%** ↑ % Change ('19 v '15)

27
National squad / elite player & development squad golfers

271,216 / 73%
Adult male registered golfers / % of adult registered golfers

102,051 / 27%
Adult female registered golfers / % of adult registered golfers

39,459 / 10%
Junior registered golfers / % of total registered golfers

804
Total golf courses
(Golf Around the World)

187 / 544
Total affiliated golf courses
9-hole / 18-hole

0
Other golf courses
(multi-hole combinations)

Georgia



GEORGIAN GOLF FEDERATION

A. Abasheli st.16, Tbilisi, Georgia, - 0179, Tbilisi, Georgia

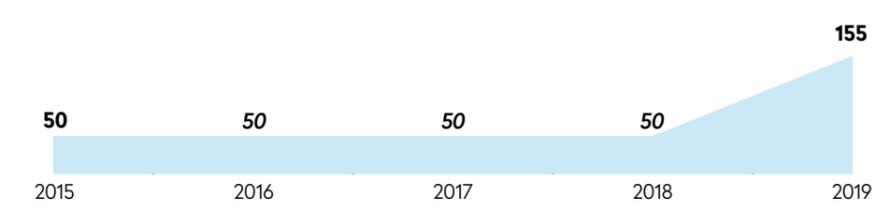
info@geo-golf.ge President: Gela Mikadze /presidentbesotediashvili
 +995322224797 CEO / Secretary: Misha Dzadzamia -
 www.geo-golf.ge /georgiangolffederation

3,731,000
Total population

155 / 0.0%
Registered golfers / % of population

52
Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



210.0% ↑ % Change ('19 v '18) **210.0%** ↑ % Change ('19 v '15)

5
National squad / elite player & development squad golfers

110 / 81%
Adult male registered golfers / % of adult registered golfers

25 / 19%
Adult female registered golfers / % of adult registered golfers

20 / 13%
Junior registered golfers / % of total registered golfers

3
Total golf courses
(Golf Around the World)

2 / 3
Total affiliated golf courses
9-hole / 18-hole

0
Other golf courses
(multi-hole combinations)



FRANCE

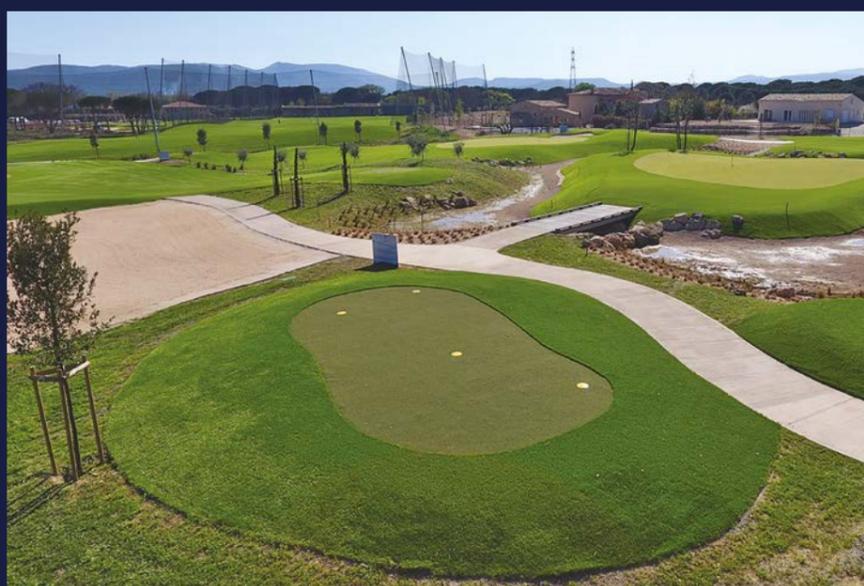
Industry learning from the development of smaller, easier and faster-to-play golf courses in urban areas across France.

It began with a hugely ambitious plan to capitalise on the staging of the 2018 Ryder Cup by facilitating the construction of 100 new golf courses and golf venues over ten years... though these would not be 'traditional' golf courses.

The French Golf Federation (ffgolf) had a strategy and broad vision to create facilities that were all:

- smaller, easier and faster-to-play
- more urban and easy to access
- more affordable

What might other golfing nations learn from France's Compact Urban Courses project?



Before the shift...

Prior to the launch of the plan, the picture of the golf infrastructure in France showed a monotype golf facility supply with a majority of large golf courses, often located in rural areas away from the main population centres, and dedicated to competition.

Running contrary to this facility provision lay a significant demand from the general public based on a growing desire for leisure, speed, ease, health, nature and wellbeing.

In response, there was a realisation that the ffgolf must develop smaller, more accessible golf facilities offering quick, affordable play,

but more importantly...

- create new and alternative leisure options and venues
- create social links for the adjacent urban community
- create venues that are economically viable at a local level
- create local employment and new jobs whilst completing the sports offer
- create tourist destinations and tourism appeal
- enhance the local environment – in particular those areas liable to flooding, municipal dumping and industrial wasteland

“Offering new facilities to the general public has a direct impact on participation in terms of age group, gender and playing frequency. Our research demonstrates that, through these short course facilities, we are able to attract more juniors and more ladies.”

Christophe Muniesa, Executive Director, ffgolf

“Any proposed change in the image of golf implies a change of user population and thereby a need to change the facilities offer.”

Christophe Muniesa, Executive Director, ffgolf

250+

Jobs have been created

€220k

Average revenue per new urban golf centre

The picture after ten years...

Recently the 101st facility was opened in Toulouse and over the last 10 years, 80,000 golfer licence cards have been delivered through these new facilities. Encouragingly, among this number are 17,000 new golfers. Attracting new players was one of the core aims of the project.

It is highly likely that these new facilities are also playing a critical role in retaining many of the existing golfers within the sport in France.

In addition, over 250 jobs have been created and demand for coaching from golf professionals has increased. The economic viability and sustainability of the courses is demonstrated through an average revenue of €220,000 and 3,000 green fees per course.

So, if you find yourself near an urban area in France, rent a set of golf clubs for €6, hit practice balls for €2.50, then play a game of golf for €18 at the weekend. If you like it enough then annual membership will cost you a very reasonable €430 for an adult and €200 for a junior – or less than €9 and €4 a week respectively.

These are average prices on offer at 101 compact courses across the country.



What can be learned?

ffgolf has been responsible for leading the project – providing guidance and know-how, facilitating environmental studies and help with finding appropriate venue locations – as well as providing introduction to local and national government. Alongside public support much of the funding of the new centres has come from private enterprise investment. Having a suitable portfolio of golf facilities, each with a golf range – and in France with a PGA Pro to support coaching – is critical for growing the sport in any country.

For other countries considering this approach, ffgolf believes it is all about location. This kind of compact golf venue has to be close to a city and reachable by public transportation. It also helps to be close to a catchment area in which you already have some golfers. As Christophe Muniesa explains “It is actually a great asset to have golfers living nearby your facility, in order to help you to raise awareness about the game and the new possibilities offered by this kind of golf course.”

For established golfing nations, with ample supply of traditional 18-hole golf facilities, are there elements of this initiative that can help shape future strategy for what golf facilities should include in order to attract new participants and retain existing golfers?

For smaller golfing nations, does this facilities model offer you more potential for building your base of participants?

Germany

GERMAN GOLF FEDERATION

Kreuzberger Ring 64, - 65205, Wiesbaden, Germany

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+49611990200
www.golf.de/dgv

President: Claus M. Kobold
CEO: Alexander Klose/ Marcus Neumann/ Jörg Schlockermann

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/deutschergolfverband

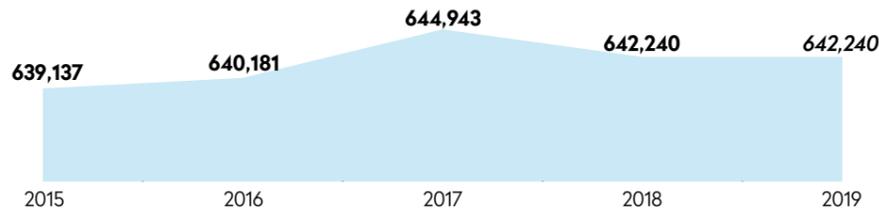


82,927,922
Total population

642,240 / 0.8%
Registered golfers / % of population

612
Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



0.0% % Change ('19 v '18) **0.5%** ↑ % Change ('19 v '15)

60
National squad / elite player & development squad golfers

380,205 / 63%
Adult male registered golfers / % of adult registered golfers

220,630 / 37%
Adult female registered golfers / % of adult registered golfers

41,405 / 6%
Junior registered golfers / % of total registered golfers

1,050
Total golf courses
(Golf Around the World)

162 / 429
Total affiliated golf courses
9-hole / 18-hole

139
Other golf courses
(multi-hole combinations)

Greece

HELLENIC GOLF FEDERATION

P.O. Box 70003, - 166 10, Glyfada Athens, Greece

info@hgf.gr
+302108941933
www.hgf.gr

President: Petros Doukas
CEO / Secretary: Thomas Tokas

f /groups/859256904146300
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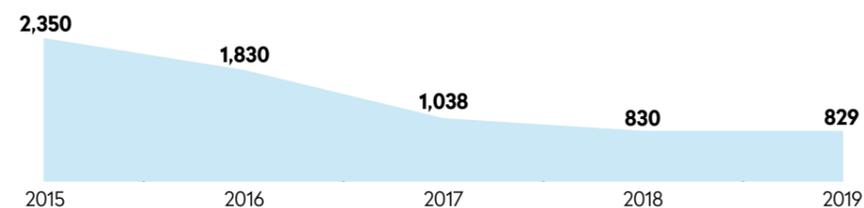


10,727,668
Total population

829 / 0.0%
Registered golfers / % of population

92
Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



-0.1% ↓ % Change ('19 v '18) **-64.7%** ↓ % Change ('19 v '15)

28
National squad / elite player & development squad golfers

522 / 83%
Adult male registered golfers / % of adult registered golfers

106 / 17%
Adult female registered golfers / % of adult registered golfers

201 / 24%
Junior registered golfers / % of total registered golfers

9
Total golf courses
(Golf Around the World)

1 / 7
Total affiliated golf courses
9-hole / 18-hole

0
Other golf courses
(multi-hole combinations)

Hungary

HUNGARIAN GOLF FEDERATION

Alkotás u. 44., - 1123, Budapest, Hungary

office@hungolf.hu
+36706232430
www.hungolf.hu

President: Dr. Norbert Szivek
CEO / Secretary: Áron Makszin

f /Magyar-Golf-Szövetség-264728533608
/magyar_golf_szovetseg

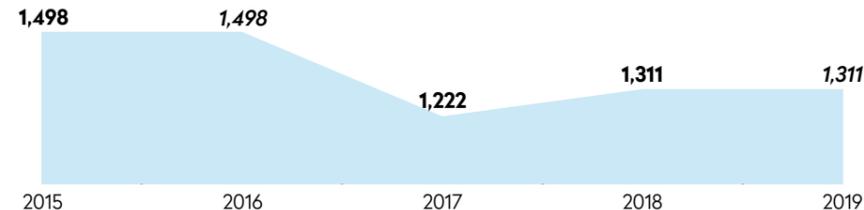


9,768,785
Total population

1,311 / 0.0%
Registered golfers / % of population

77
Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



0.0% % Change ('19 v '18) **-12.5%** ↓ % Change ('19 v '15)

20
National squad / elite player & development squad golfers

896 / 74%
Adult male registered golfers / % of adult registered golfers

315 / 26%
Adult female registered golfers / % of adult registered golfers

100 / 8%
Junior registered golfers / % of total registered golfers

17
Total golf courses
(Golf Around the World)

6 / 7
Total affiliated golf courses
9-hole / 18-hole

0
Other golf courses
(multi-hole combinations)

Iceland

GOLF UNION OF ICELAND

Sport Center Laugardalur - Engjavegur 6, - 104, Reykjavik, Iceland

info@golf.is
+3545144050
www.golf.is

President: Haukur Örn Birgisson
CEO / Secretary: Brynjar Eldon Geirsson

f /golfaislandi
@golsamband
/golf.is

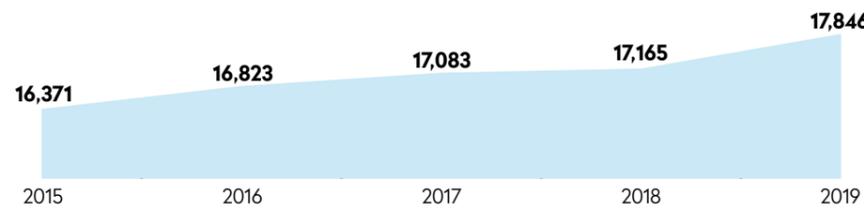


353,574
Total population

17,846 / 5.0%
Registered golfers / % of population

238
Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



4.0% ↑ % Change ('19 v '18) **9.0%** ↑ % Change ('19 v '15)

120
National squad / elite player & development squad golfers

10,427 / 67%
Adult male registered golfers / % of adult registered golfers

5,101 / 33%
Adult female registered golfers / % of adult registered golfers

2,318 / 13%
Junior registered golfers / % of total registered golfers

75
Total golf courses
(Golf Around the World)

42 / 20
Total affiliated golf courses
9-hole / 18-hole

2
Other golf courses
(multi-hole combinations)



ICELAND

Lava, mountains, glaciers and even more new golfers – roving professionals making golf more accessible across Iceland.

In the most sparsely populated country in Europe, an impressive 16% of the population golf at least once a year on courses that follow the contours of a naturally dramatic landscape characterised by lava fields, mountains and glaciers.

Despite this, the Golf Union of Iceland (GSI) continues to look at how to consistently introduce new people to the sport, particularly looking beyond the main centres of population to more remote areas.

In recent years, Iceland has seen increasing success at the top end of the sport. Golf at the performance

level in Iceland is now among the top four sports and media interest is at an unprecedented level. However, in order to deliver performance at elite level, the GSI recognises it must ensure the viability of the game at the grassroots level.

The Roving Pro project is one part of the GSI seven year Golf Development Plan (2013-2020) seeking to make golf accessible for all people across the country. Supported by funding from The R&A, roving PGA golf professionals visited five rural golf clubs without access to a professional, resulting

in over 80 new golfers joining the sport, 50 of whom were girls.

This positive outcome after only one year reflects a priority on improving the standard of coaching, particularly regarding participation and retention of golfers. It also clearly demonstrates the effect that a reasonably straightforward and inexpensive initiative can have.

The strong working collaboration between the GSI and the PGA of Iceland is a reminder of the critical importance of partnership working when setting out golf development targets.



16%

of the population golf at least once a year

“With the realisation that we are all ‘on the same team’ and that for the greater good of golf, we must grow the game together for future generations to engage with the game. A new harmonious relationship has been established. We now have the PGA and Golf Union working in a synergised tandem to deliver a master vision.”

Gregor Brodie, GSI Sports Director / National Coach

Ireland



GOLFING UNION OF IRELAND

National Headquarters, Carton Demesne, Maynooth, Ireland

pat@gui.ie | +35315054000 | www.golfnet.ie
 President: Jim McGovern
 CEO / Secretary: Pat Finn



IRISH LADIES GOLFING UNION

103 – 105 Q House, 76 Furze Road, Sandyford Business District, Dublin 18, Ireland

info@ilgu.ie | +353 1 2934833 | www.golfnet.ie
 President: Brigid McCaw
 CEO / Secretary: Sinead Heraty

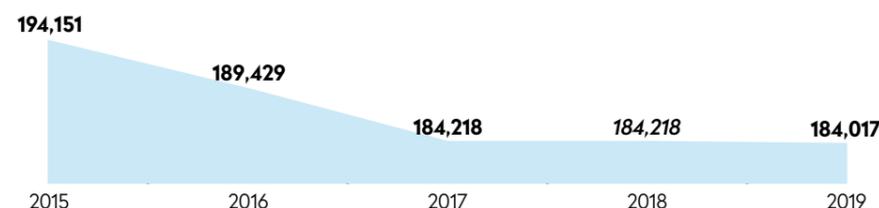


6,735,106
Total population

184,017 / 2.7%
Registered golfers / % of population

373
Registered golfers per course (Golf Around the World courses)

Registered golfers – change over time



-0.1% ↓ % Change ('19 v '18) -5.2% ↓ % Change ('19 v '15)

127,000 / 78%
Adult male registered golfers / % of adult registered golfers

36,017 / 22%
Adult female registered golfers / % of adult registered golfers

36
National squad / elite player & development squad golfers

494
Total golf courses (Golf Around the World)

93 / 290
Total affiliated golf courses 9-hole / 18-hole

21,000 / 11%
Junior registered golfers / % of total registered golfers

30
Other golf courses (multi-hole combinations)

Israel



ISRAEL GOLF FEDERATION

P.O. Box 141, - 38900, Caesarea, Israel

chairman@israelgolffed.org | +972543451516 | www.israelgolffed.org
 President: -
 CEO / Secretary: Irit Peleg

/IsraelGolfFed



8,883,800
Total population

544 / 0.0%
Registered golfers / % of population

272
Registered golfers per course (Golf Around the World courses)

Registered golfers – change over time



-32.5% ↓ % Change ('19 v '18) -31.6% ↓ % Change ('19 v '15)

466 / 88%
Adult male registered golfers / % of adult registered golfers

62 / 12%
Adult female registered golfers / % of adult registered golfers

0
National squad / elite player & development squad golfers

2
Total golf courses (Golf Around the World)

1 / 1
Total affiliated golf courses 9-hole / 18-hole

16 / 3%
Junior registered golfers / % of total registered golfers

0
Other golf courses (multi-hole combinations)

Italy



ITALIAN GOLF FEDERATION

Viale Tiziano, 74, - 00196, Roma, Italy

tecnicofedergolf.it
+39063231825
www.federgolf.it

President: Franco Chimenti
CEO / Secretary:
Maria Teresa Paparozzi

/FederGolf
@FederGolf
/federazioneitalianagolf



60,431,283

Total population

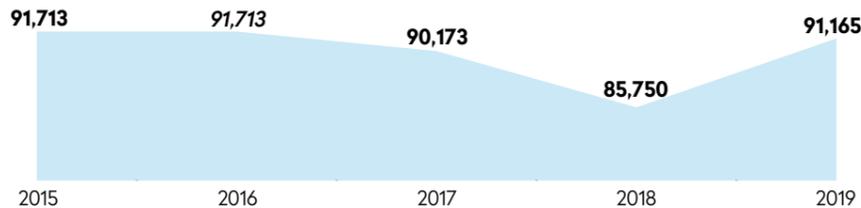
91,165 / 0.2%

Registered golfers / % of population

284

Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



6.3% ↑ % Change ('19 v '18) **-0.6%** ↓ % Change ('19 v '15)

0
National squad / elite player
& development squad golfers

60,482 / 75%
Adult male registered golfers
/ % of adult registered golfers

19,668 / 25%
Adult female registered golfers
/ % of adult registered golfers

11,015 / 12%
Junior registered golfers
/ % of total registered golfers

321
Total golf courses
(Golf Around the World)

96 / 117
Total affiliated golf courses
9-hole / 18-hole

0
Other golf courses
(multi-hole combinations)

Kazakhstan



KAZAKHSTAN GOLF FEDERATION

Nurtau Golf Club, Alatau Sanatorium - 050000, Tausamaly, ALA, Kazakhstan

kazfedgolf@gmail.com
+7 (727) 222 0507
www.kazgolf.kz

President: Yerbol Bukharbayev
CEO / Secretary:
Abykaev Nurtay Abykayevich

/kazgolf
-
/kazfedgolf



18,276,499

Total population

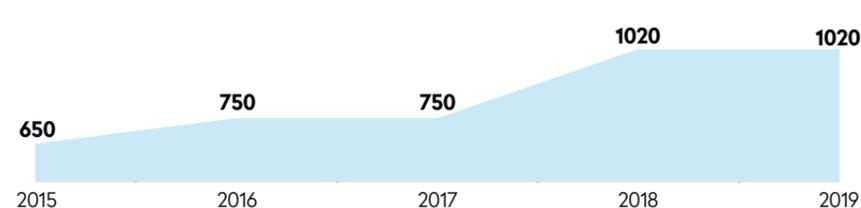
1,020 / 0.0%

Registered golfers / % of population

113

Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



0.0% % Change ('19 v '18) **56.9%** ↑ % Change ('19 v '15)

0
National squad / elite player
& development squad golfers

600 / 75%
Adult male registered golfers
/ % of adult registered golfers

200 / 25%
Adult female registered golfers
/ % of adult registered golfers

220 / 22%
Junior registered golfers
/ % of total registered golfers

9
Total golf courses
(Golf Around the World)

2 / 8
Total affiliated golf courses
9-hole / 18-hole

0
Other golf courses
(multi-hole combinations)

Latvia



LATVIAN GOLF FEDERATION

Milgravja iela 16, - 1034, Riga, Latvia

info@golfaskola.lv
+37129191428
www.golf.lv

President: Armands Puče
CEO / Secretary: Armands Puče

/LatvijasGolfaFederacija
-
-



1,926,542

Total population

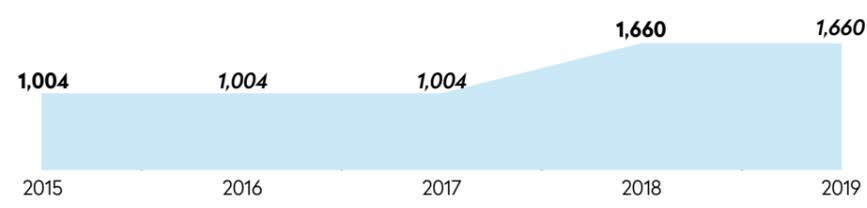
1,660 / 0.1%

Registered golfers / % of population

128

Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



0.0% % Change ('19 v '18) **65.3%** ↑ % Change ('19 v '15)

26
National squad / elite player
& development squad golfers

1,310 / 91%
Adult male registered golfers
/ % of adult registered golfers

130 / 9%
Adult female registered golfers
/ % of adult registered golfers

220 / 13%
Junior registered golfers
/ % of total registered golfers

13
Total golf courses
(Golf Around the World)

10 / 2
Total affiliated golf courses
9-hole / 18-hole

0
Other golf courses
(multi-hole combinations)

Liechtenstein



LIECHTENSTEIN GOLF FEDERATION

Postfach 264, - 9490, Vaduz, Liechtenstein

info@golf.li
+4232321991
www.golf.li

President: Peter Tinner
CEO / Secretary: Thomas Schaber

/GVL1966
-
-



37,910

Total population

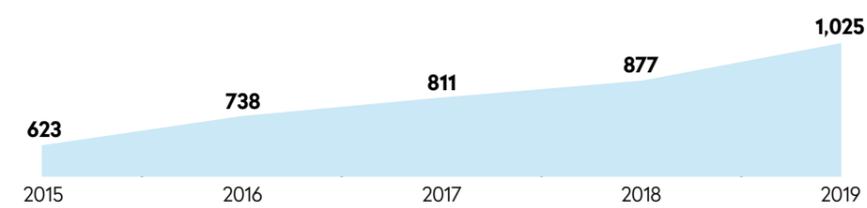
1,025 / 2.7%

Registered golfers / % of population

N/A

Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



16.9% ↑ % Change ('19 v '18) **64.5%** ↑ % Change ('19 v '15)

0
National squad / elite player
& development squad golfers

616 / 64%
Adult male registered golfers
/ % of adult registered golfers

345 / 36%
Adult female registered golfers
/ % of adult registered golfers

64 / 6%
Junior registered golfers
/ % of total registered golfers

N/A
Total golf courses
(Golf Around the World)

0 / 1
Total affiliated golf courses
9-hole / 18-hole

0
Other golf courses
(multi-hole combinations)

Lithuania



LITHUANIA GOLF FEDERATION

Olimpieciu str. 1-55, - 09200, Vilnius, Lithuania

info@golffederacija.lt
+37065744653
www.golffederacija.lt

President: Česlav Okinčic
CEO / Secretary:
Mindaugas Markevičius

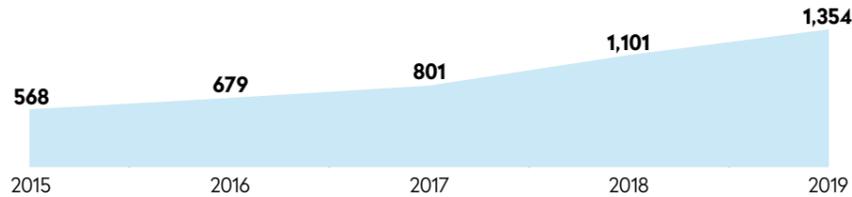
/golffederacija
-
-

2,789,533
Total population

1,354 / 0.0%
Registered golfers / % of population

193
Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



23.0% ↑ % Change ('19 v '18) **138.4%** ↑ % Change ('19 v '15)

17
National squad / elite player
& development squad golfers

954 / 74%
Adult male registered golfers
/ % of adult registered golfers

336 / 26%
Adult female registered golfers
/ % of adult registered golfers

64 / 5%
Junior registered golfers
/ % of total registered golfers

7
Total golf courses
(Golf Around the World)

1 / 5
Total affiliated golf courses
9-hole / 18-hole

0
Other golf courses
(multi-hole combinations)

Luxembourg



LUXEMBOURG GOLF FEDERATION

Domaine de Belenhaff, - 6141, Junglinster, Luxembourg

carlo@gastaldi.lu
+35226782383
www.flgolf.lu

President: Christian Schock
CEO / Secretary: Carlo Gastaldi

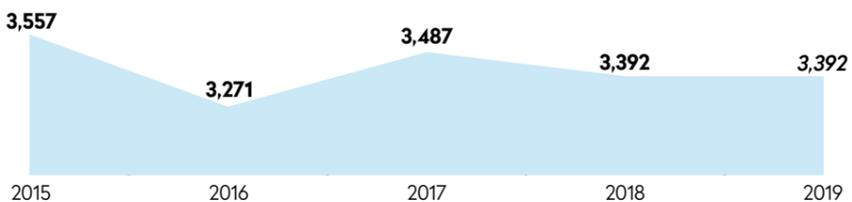
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-

607,728
Total population

3,392 / 0.6%
Registered golfers / % of population

678
Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



0.0% % Change ('19 v '18) **-4.6%** ↓ % Change ('19 v '15)

0
National squad / elite player
& development squad golfers

2,033 / 67%
Adult male registered golfers
/ % of adult registered golfers

998 / 33%
Adult female registered golfers
/ % of adult registered golfers

361 / 11%
Junior registered golfers
/ % of total registered golfers

5
Total golf courses
(Golf Around the World)

0 / 5
Total affiliated golf courses
9-hole / 18-hole

0
Other golf courses
(multi-hole combinations)

Malta



MALTA GOLF ASSOCIATION

Aldo Moro Street, - MRS9064, Marsa, Malta

golfing@maltagolf.org
+35699499207
www.maltagolf.org

President: William Beck
CEO / Secretary: Ian Restall

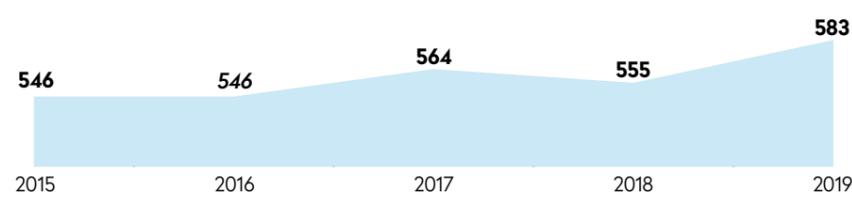
/Malta-Golf-
Association-163753557010471/
-

483,530
Total population

583 / 0.1%
Registered golfers / % of population

583
Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



5.0% ↑ % Change ('19 v '18) **6.8%** ↑ % Change ('19 v '15)

7
National squad / elite player
& development squad golfers

383 / 75%
Adult male registered golfers
/ % of adult registered golfers

131 / 25%
Adult female registered golfers
/ % of adult registered golfers

69 / 12%
Junior registered golfers
/ % of total registered golfers

1
Total golf courses
(Golf Around the World)

0 / 1
Total affiliated golf courses
9-hole / 18-hole

0
Other golf courses
(multi-hole combinations)

Netherlands



NETHERLANDS GOLF FEDERATION

P.O. Box 8585, - 3503, RN Utrecht, Netherlands

golf@ngf.nl
+31302426370
www.ngf.nl

President: Willem Zelsmann
CEO / Secretary: Jeroen Stevens

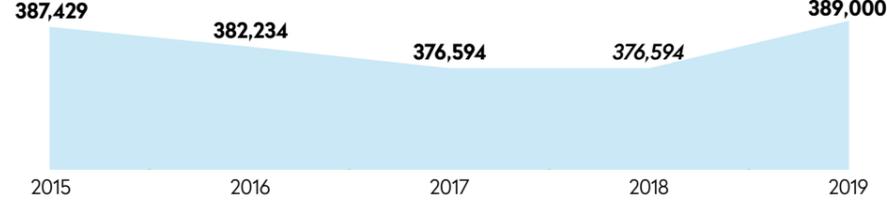
/NGF.NederlandseGolfFederatie
@NGF_
nederlandse.golf.federatie

17,231,017
Total population

389,000 / 2.3%
Registered golfers / % of population

1,179
Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



3.3% ↑ % Change ('19 v '18) **0.4%** ↓ % Change ('19 v '15)

0
National squad / elite player
& development squad golfers

253,000 / 67%
Adult male registered golfers
/ % of adult registered golfers

123,000 / 33%
Adult female registered golfers
/ % of adult registered golfers

13,000 / 3%
Junior registered golfers
/ % of total registered golfers

330
Total golf courses
(Golf Around the World)

51 / 175
Total affiliated golf courses
9-hole / 18-hole

25
Other golf courses
(multi-hole combinations)

Norway



NORWEGIAN GOLF FEDERATION

Postbox 5000, Sognsveien 75 A1, Ullevål Stadion - 0840, Oslo, Norway

post@golfforbundet.no
+4721029150
www.golfforbundet.no

President: Marit Wiig
CEO / Secretary:
Tor-Anders Hanssen

/golfforbundet
-
/golfforbundet



5,314,336

Total population

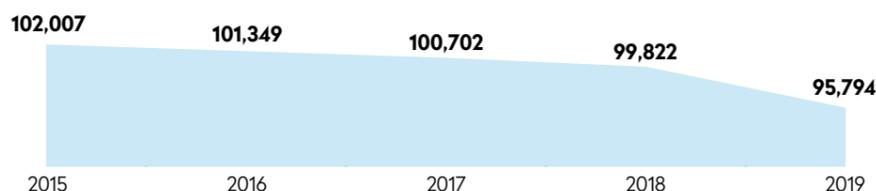
95,794 / 1.8%

Registered golfers / % of population

502

Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



-4.0% ↓ **-6.1%** ↓
% Change ('19 v '18) % Change ('19 v '15)

65

National squad / elite player
& development squad golfers

67,697 / 76%
Adult male registered golfers
/ % of adult registered golfers

20,870 / 24%
Adult female registered golfers
/ % of adult registered golfers

7,227 / 8%
Junior registered golfers
/ % of total registered golfers

191

Total golf courses
(Golf Around the World)

94 / 62

Total affiliated golf courses
9-hole / 18-hole

14

Other golf courses
(multi-hole combinations)

Poland



POLISH GOLF UNION

LIM Center, Al. Jerozolimskie 65/79 - 00-697, Warsaw, Poland

biuro@pzgolf.pl
+48226305560
www.pzgolf.pl

President: Marek Michałowski
CEO / Secretary:
Bartłomiej Chełmecki

/PolandGolf
-
/polishgolfteam



37,978,548

Total population

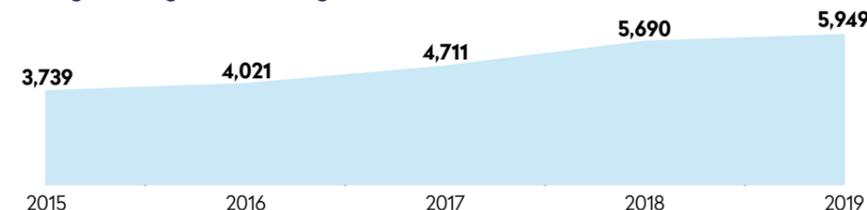
5,949 / 0.0%

Registered golfers / % of population

127

Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



4.6% ↑ **59.1%** ↑
% Change ('19 v '18) % Change ('19 v '15)

0

National squad / elite player
& development squad golfers

4,174 / 78%
Adult male registered golfers
/ % of adult registered golfers

1,157 / 22%
Adult female registered golfers
/ % of adult registered golfers

618 / 10%
Junior registered golfers
/ % of total registered golfers

47

Total golf courses
(Golf Around the World)

15 / 19

Total affiliated golf courses
9-hole / 18-hole

0

Other golf courses
(multi-hole combinations)

Portugal



PORTUGUESE GOLF FEDERATION

Rua Santa Teresa do Menino Jesus N° 6, 17°, - 1495-048, Alges, Portugal

fpg@fpg.pt
+351214123780
www.fpg.pt

President: Miguel Franco de Sousa
CEO / Secretary:
Miguel Franco de Sousa

/golfeportugal
-
-



10,281,762

Total population

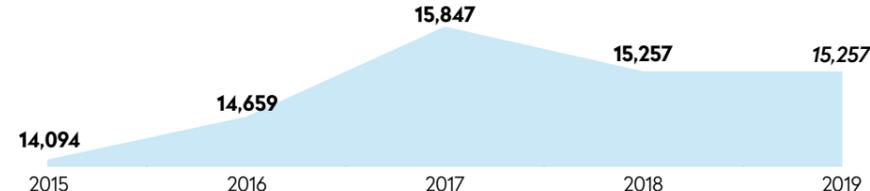
15,257 / 0.1%

Registered golfers / % of population

144

Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



0.0% **8.3%** ↑
% Change ('19 v '18) % Change ('19 v '15)

0

National squad / elite player
& development squad golfers

11,195 / 79%
Adult male registered golfers
/ % of adult registered golfers

2,934 / 21%
Adult female registered golfers
/ % of adult registered golfers

1,128 / 7%
Junior registered golfers
/ % of total registered golfers

106

Total golf courses
(Golf Around the World)

0 / 91

Total affiliated golf courses
9-hole / 18-hole

0

Other golf courses
(multi-hole combinations)

Republic of North Macedonia



MACEDONIAN GOLF FEDERATION

Blv. Jane Sandanski 14-1/2, - 1000, Skopje, Republic of North Macedonia

mkgolffed@gmail.com
+38922463083
www.golfmacedonia.com

President: Naum Janakiev
CEO / Secretary: -

-
-
-



2,082,958

Total population

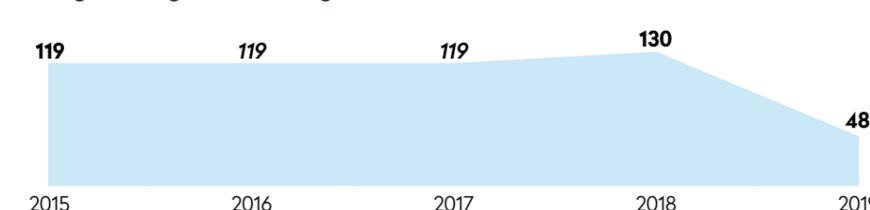
48 / 0.0%

Registered golfers / % of population

0

Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



-63.1% ↓ **-59.7%** ↓
% Change ('19 v '18) % Change ('19 v '15)

0

National squad / elite player
& development squad golfers

35 / 88%
Adult male registered golfers
/ % of adult registered golfers

5 / 13%
Adult female registered golfers
/ % of adult registered golfers

8 / 17%
Junior registered golfers
/ % of total registered golfers

0

Total golf courses
(Golf Around the World)

0 / 0

Total affiliated golf courses
9-hole / 18-hole

0

Other golf courses
(multi-hole combinations)

Romania



ROMANIAN GOLF FEDERATION

24, Carierei Str., - 105 400, Breaza, Romania

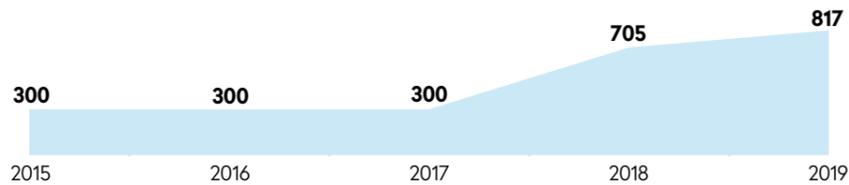
office@frgolf.ro | +40723056789 | www.frgolf.ro
 President: Catalin Beciu | CEO / Secretary: Nicolae Kovacs
 /FederatiaRomanadeGolf

19,473,936
Total population

817 / 0.0%
Registered golfers / % of population

102
Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



15.9% ↑ % Change ('19 v '18) | **172.3% ↑** % Change ('19 v '15)

0
National squad / elite player & development squad golfers

584 / 78%
Adult male registered golfers / % of adult registered golfers

161 / 22%
Adult female registered golfers / % of adult registered golfers

72 / 9%
Junior registered golfers / % of total registered golfers

8
Total golf courses
(Golf Around the World)

4 / 2
Total affiliated golf courses
9-hole / 18-hole

2
Other golf courses
(multi-hole combinations)

Russia



RUSSIAN GOLF ASSOCIATION

Office 378, 8, Luzhnetskaya nab. - 119991, Moscow, Russian Federation

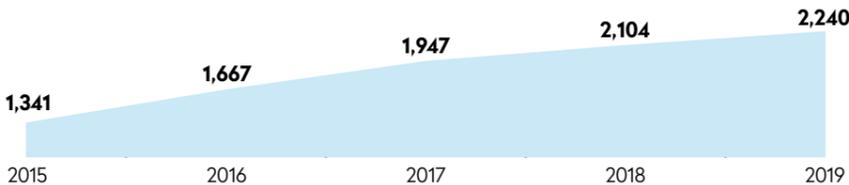
info@rusgolf.ru | +74957254719 | www.rusgolf.ru
 President: Victor Khristenko | CEO / Secretary: Alexander Kochetkov
 /russiangulfassociation | @Rusgolf92 | /russian_golf_association

144,478,050
Total population

2,240 / 0.0%
Registered golfers / % of population

83
Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



6.5% ↑ % Change ('19 v '18) | **67.0% ↑** % Change ('19 v '15)

50
National squad / elite player & development squad golfers

1,302 / 72%
Adult male registered golfers / % of adult registered golfers

497 / 28%
Adult female registered golfers / % of adult registered golfers

441 / 20%
Junior registered golfers / % of total registered golfers

26
Total golf courses
(Golf Around the World)

10 / 17
Total affiliated golf courses
9-hole / 18-hole

7
Other golf courses
(multi-hole combinations)

UNITED KINGDOM

Significant growth in GolfSixes across UK and continental Europe.



With 24 GolfSixes Leagues staged across 22 UK regions, 102 golf clubs took part in this fun-filled six-hole format across the UK in the summer of 2018. As the perfect entry level competition, the result was many young people being encouraged into the sport, and the GolfSixes events receiving significant financial support from The R&A.

The Golf Foundation initiative, in association with the European Tour, The R&A, England Golf, Wales Golf and Scottish Golf saw 1,160 juniors playing a total of 161 fixtures. 25% of the participants were girls and, crucially, the leagues led to an impressive 34% increase in junior membership at the clubs involved. There are plans for more than 50 Leagues in 2019, involving 200 golf clubs and over 2,500 young people taking part.

Lasting just over an hour, GolfSixes League matches are fast, fun and provide a sense of belonging as well as creating a foundation for

a long-lasting love of golf. Many participants have obtained or are about to obtain handicaps as a result of participation. The team structure enables young players to experience playing against other clubs in a fun Texas Scramble format – a great way of building confidence among new players.

65% of all the participating children's parents actively volunteered their support at the GolfSixes Leagues and 58% of PGA coaches in participating clubs provided additional practice sessions for GolfSixes League squad members.

The imagination of youngsters in the UK has been captured and similar leagues have been launched across Europe in Belgium, Denmark, Finland, France, the Netherlands and Portugal inspired by the European Tour event that features men and women competing against each other.

25%

of the participants were girls



of a total of 1,160 juniors

161

fixtures played

Scotland



SCOTTISH GOLF

The Duke's, St Andrews KY16 8NX, Scotland

info@scottishgolf.org
+441334466477
www.scottishgolf.org

President: Malcolm Mitchell
CEO / Secretary: Andrew McKinlay

/ScottishGolf
@ScottishGolf
/wearescottishgolf

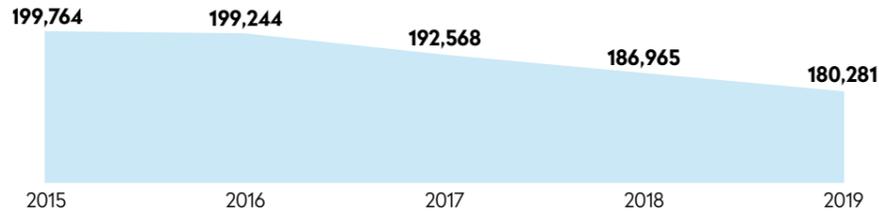


5,438,100
Total population

180,281 / 3.3%
Registered golfers / % of population

294
Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



-3.6% ↓ % Change ('19 v '18)
-9.8% ↓ % Change ('19 v '15)

66
National squad / elite player
& development squad golfers

143,403 / 87%
Adult male registered golfers
/ % of adult registered golfers

21,364 / 13%
Adult female registered golfers
/ % of adult registered golfers

15,514 / 9%
Junior registered golfers
/ % of total registered golfers

614
Total golf courses
(Golf Around the World)

145 / 410
Total affiliated golf courses
9-hole / 18-hole

5
Other golf courses
(multi-hole combinations)

Serbia



GOLF ASSOCIATION OF SERBIA

Ada Ciganlija 2, - 11000, Belgrade, Serbia

office@golfas.rs
+381114001810
www.golfasocijaciasrbije.rs

President: Dragan Šolak
CEO / Secretary:
Irena Suturović Bogdanović

/GolfasocijacijaSrbijeGolfAssociation
OfSerbia
/golfasocijaciasrbije

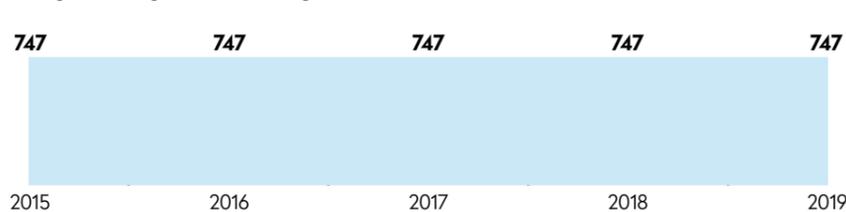


6,982,084
Total population

747 / 0.0%
Registered golfers / % of population

374
Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



0.0% % Change ('19 v '18)
0.0% % Change ('19 v '15)

8
National squad / elite player
& development squad golfers

437 / 80%
Adult male registered golfers
/ % of adult registered golfers

110 / 20%
Adult female registered golfers
/ % of adult registered golfers

200 / 27%
Junior registered golfers
/ % of total registered golfers

2
Total golf courses
(Golf Around the World)

2 / 0
Total affiliated golf courses
9-hole / 18-hole

0
Other golf courses
(multi-hole combinations)

Slovakia



SLOVAK GOLF ASSOCIATION

Kukucinova 26, - 831 02, Bratislava, Slovakia

skga@skga.sk
+421244450727
www.skga.sk

President: Tomáš Stoklasa
CEO / Secretary: Kamil Balga

/skgagolf
-
/slovakgolf

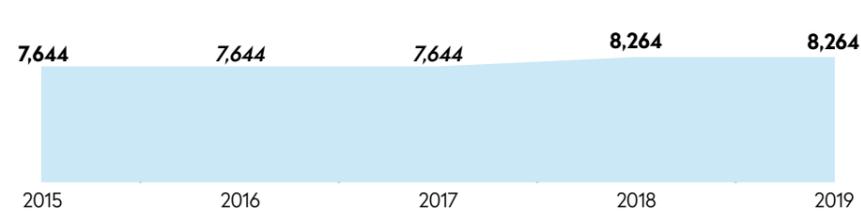


5,447,011
Total population

8,264 / 0.2%
Registered golfers / % of population

250
Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



0.0% ↑ % Change ('19 v '18)
8.1% ↑ % Change ('19 v '15)

30
National squad / elite player
& development squad golfers

5316 / 71%
Adult male registered golfers
/ % of adult registered golfers

2186 / 29%
Adult female registered golfers
/ % of adult registered golfers

762 / 9%
Junior registered golfers
/ % of total registered golfers

33
Total golf courses
(Golf Around the World)

15 / 12
Total affiliated golf courses
9-hole / 18-hole

3
Other golf courses
(multi-hole combinations)

Slovenia



SLOVENIAN GOLF ASSOCIATION

Smartinska 152, - 1122, Ljubljana, Slovenia

golfzveza@golfzveza-slovenije.si
+38614303200
Web

President: Marijan Jurenc
CEO / Secretary: Gorazd Kogoj

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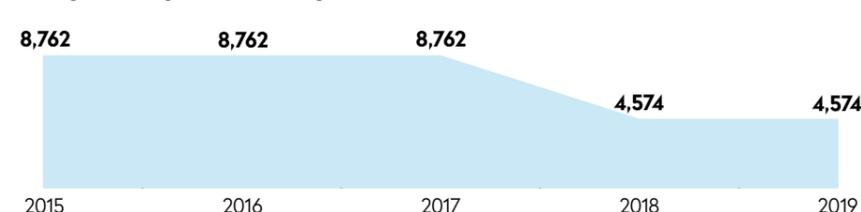


2,067,372
Total population

4,574 / 0.2%
Registered golfers / % of population

327
Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



0.0% % Change ('19 v '18)
-47.8% ↓ % Change ('19 v '15)

0
National squad / elite player
& development squad golfers

2,933 / 68%
Adult male registered golfers
/ % of adult registered golfers

1,397 / 32%
Adult female registered golfers
/ % of adult registered golfers

244 / 5%
Junior registered golfers
/ % of total registered golfers

14
Total golf courses
(Golf Around the World)

6 / 7
Total affiliated golf courses
9-hole / 18-hole

0
Other golf courses
(multi-hole combinations)

Spain



ROYAL SPANISH GOLF FEDERATION

Arroyo del Monte, 5, 28035 - 28035, Madrid, Spain

rfegolf@rfegolf.es
+34915552682
www.rfegolf.es

President: Gonzaga Escauriaza
CEO / Secretary: Jorge Sagardoy

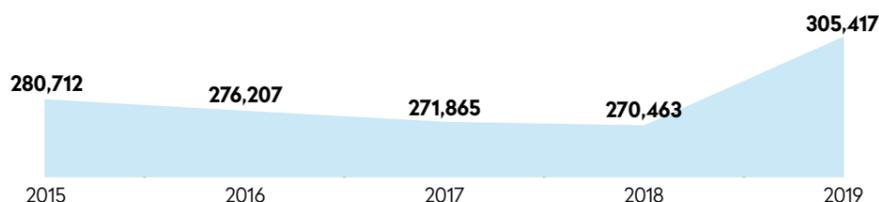
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46,723,749
Total population

305,417 / 0.7%
Registered golfers / % of population

615
Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



12.9% ↑ % Change ('19 v '18)
8.8% ↑ % Change ('19 v '15)

56
National squad / elite player
& development squad golfers

193,804 / 71%
Adult male registered golfers
/ % of adult registered golfers

77,300 / 29%
Adult female registered golfers
/ % of adult registered golfers

34,313 / 11%
Junior registered golfers
/ % of total registered golfers

497
Total golf courses
(Golf Around the World)

103 / 291
Total affiliated golf courses
9-hole / 18-hole

0
Other golf courses
(multi-hole combinations)

Sweden



SWEDISH GOLF FEDERATION

Box 11016, - 100 61 Stockholm, Sweden

info@golf.se
+4686221500
www.golf.se

President: Maria Möller
CEO / Secretary:
Gunnar Håkansson

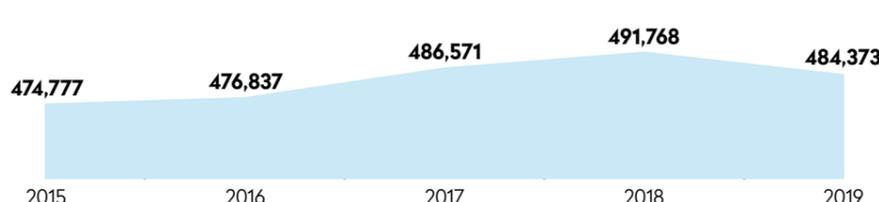
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10,183,175
Total population

484,373 / 4.8%
Registered golfers / % of population

732
Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



-1.5% ↓ % Change ('19 v '18)
2.0% ↑ % Change ('19 v '15)

0
National squad / elite player
& development squad golfers

315,977 / 72%
Adult male registered golfers
/ % of adult registered golfers

121,552 / 28%
Adult female registered golfers
/ % of adult registered golfers

46,844 / 10%
Junior registered golfers
/ % of total registered golfers

662
Total golf courses
(Golf Around the World)

75 / 273
Total affiliated golf courses
9-hole / 18-hole

101
Other golf courses
(multi-hole combinations)

Switzerland



SWISS GOLF

Place Croix-Blanche 19, Case Postale 204 - 1066, Epalinges, Switzerland

info@swissgolf.ch
+41217857000
www.swissgolf.ch

President: Reto Bieler
CEO / Secretary: Barbara Albisetti

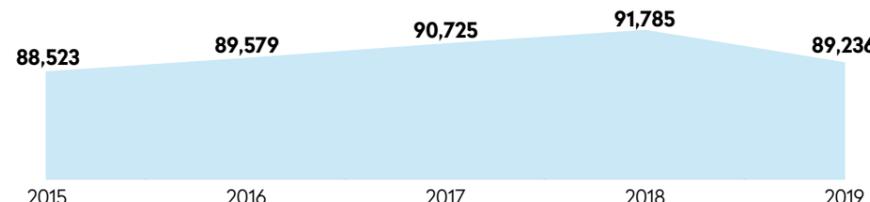
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8,516,543
Total population

89,236 / 1.0%
Registered golfers / % of population

783
Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



-2.8% ↓ % Change ('19 v '18)
0.8% ↑ % Change ('19 v '15)

190
National squad / elite player
& development squad golfers

53,302 / 64%
Adult male registered golfers
/ % of adult registered golfers

30,537 / 36%
Adult female registered golfers
/ % of adult registered golfers

5,397 / 6%
Junior registered golfers
/ % of total registered golfers

114
Total golf courses
(Golf Around the World)

27 / 77
Total affiliated golf courses
9-hole / 18-hole

0
Other golf courses
(multi-hole combinations)

Turkey



TURKISH GOLF FEDERATION

Bestepe Mah. Yasam Is Merkezi, A Blok No:13/57 - 06050, Yenimahalle, Turkey

info@tgf.org.tr
+903123093945
www.tgf.org.tr

President: Ahmet Ali Agaoglu
CEO / Secretary: Erdogan Akkaya

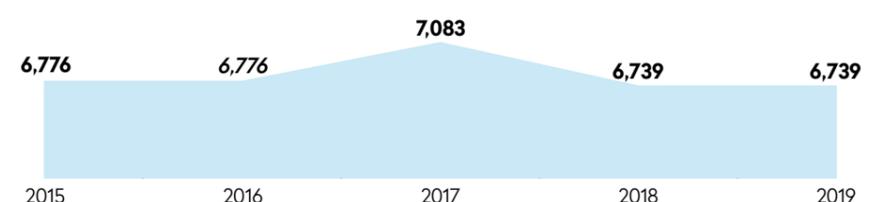
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82,319,724
Total population

6,739 / 0.0%
Registered golfers / % of population

204
Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



0.0% % Change ('19 v '18)
-0.5% ↓ % Change ('19 v '15)

56
National squad / elite player
& development squad golfers

2,788 / 70%
Adult male registered golfers
/ % of adult registered golfers

1,190 / 30%
Adult female registered golfers
/ % of adult registered golfers

2,761 / 41%
Junior registered golfers
/ % of total registered golfers

33
Total golf courses
(Golf Around the World)

6 / 20
Total affiliated golf courses
9-hole / 18-hole

3
Other golf courses
(multi-hole combinations)



SWEDEN

Changing objectives, changing attitudes: The vision of 50% female participation in Sweden

The image of golf as a predominantly male sport, both in participation numbers and in the positions of leadership and influence, is a widespread perception around the sport and around the wider reach of society.

The R&A, through the Women in Golf Charter, as well as many other organisations in the sport are now championing campaigns to address this.

Vision 50/50 is the Swedish Golf Federation's innovative programme aimed at increasing women and girls participation in golf throughout Sweden to the level of 50%.

The case for change

Golf in Sweden had grown steadily over a period of 100 years until 2003 when participation numbers started to decline and continued to do so for 10 years in a row.

At that time the Swedish Golf Federation assessed its 473 clubs and found that of the 482,000 golf club members and the 200,000 non-registered players, only 28% were female.

Perhaps more significantly, only...

- 9% of club presidents were female
- 17% of club managers were female
- 23% of club committees were female

Vision 50/50 launched in 2016 with eight pilot golf clubs and has now grown to involve almost 100 clubs



nationwide.

Mapping the path to a new landscape

Vision 50/50 has a number of objectives:

- Adjust the course setup for better playing experiences for all people
- Establish good quality experiences within the club environment (clubhouse services, appropriate food and beverage offering, gyms, running paths)
- Arrange golf activities that focus on health and recreation (not only competition)
- Promote playing options that take less time
- Tackle outdated attitudes and beliefs still existing in golf

In addition, the Swedish Golf Federation set out two key challenges to the sport:

1. Do not place the problem on the *minority* (i.e. women) and hold them responsible for the imbalance in existence
2. Realise that changes need to happen among the *majority* (i.e. males)

“Our golf associations in Sweden, the Professional Golfers Association, the Golf Administrators Association and the Swedish Greenkeepers Association are important partners to achieve the change. Even the federation’s sponsors and partners are important and can put pressure on us. We can already see examples of increased sponsorship income among the golf clubs that work according to Vision 50/50.”

Annica Lundström, SGF National Project Manager, Vision 50/50



In 2003, of the 482,000 golf club members and the 200,000 non-registered players at 473 clubs, **only 28% were female.**



“Change in this area of the sport requires a certain courage to challenge prevailing norms and structures. During changes there will most likely be resistance from people. It is really hard to change deep rooted norms and structures but it is necessary for the sport in order to remain relevant to the younger generation. This will also take time.”

Annica Lundström, SGF National Project Manager, Vision 50/50

Resourcing the vision

A team of five people lead Vision 50/50, with golf clubs and districts receiving support from the Swedish Golf Federation's Club Advisors. The objective was to build sustainable structures that would last over time.

Meetings were organised that educated clubs and districts about gender equality, structure and culture whilst inspiring through good case study examples. This created a deep understanding of all elements of Vision 50/50 and was unique within sport in Sweden.

Progress goals

With continuous progression in clubs being demonstrated since 2016, the 2020 goals for the vision are clear:

- Increase of 10,000 female golfers (approximately 20 per golf club) on 2016 figures

- More equal representation on club boards, with 35% women a goal
- The Vision 50/50 processes started in 200 clubs

In addition, the first ever female President of the Swedish Golf Federation was elected in 2017, offering a demonstrable shift at leadership level that further supports cultural change.

What can we learn?

The Swedish Golf Federation believes the programme could be used by any country or organisation. However, content must be adapted to the specific local culture and environment to make the participants feel more comfortable and the process to be culturally relevant.

Three crucial factors were identified as prerequisites for the change process in clubs:

1. That there is a will and commitment from the board and club management
2. There is a leader in the club that has experience of managing processes
3. There is an understanding that success will not happen overnight

Annica Lundström (SGF National Project Manager – Vision 50/50) believes that the change should take place where the people gather for the sport – namely at the golf club. Merely developing a policy document – to show a commitment by the national federation – does not in itself have any sustainable long-term effects.

With a vision, a dose of courage, commitment and some consistent resourcing, the vision of golf being played by 50% women and 50% men in a country may well be achievable. For those sharing this vision, look to Sweden for some guidance.

Strategies for success: New R&A Strategic Development Programme supports ten countries.



The R&A's 'Leading Golf Strategy Development Programme' was offered in Europe for the first time in 2019 to Federation representatives from ten nations.

Leading figures representing Bulgaria, Croatia, Cyprus, Estonia, Greece, Latvia, Lithuania, Malta, Serbia and Ukraine attended an intensive three-day workshop delivered in Paris.

The purpose of the workshop was to create a forum for national federations to reflect on their current strategic direction, key challenges and to share ideas and best practices which will help in the development of golf in their country.

Does strategy really matter?

With the most established golfing nations demonstrating the value of smart planning, vision setting and demonstrable measures of progress, an opportunity was identified for The R&A to provide support to

countries with ambition to grow the game but not yet at the stage of strategizing on a national scale.

The programme was shaped around the four key elements of strategy for developing and growing golf: planning, formulation, implementation and evaluation.

Leading the development of plans

The workshop not only supported golf and organisational development, but also critically offered a platform for personal development. Participants developed their own strategic management competencies to support them in their roles as leading figures in golf within their respective countries.

The R&A aims to invest over £200 million over a ten-year period into golf, a substantial proportion of which will go to support affiliates worldwide with golf development initiatives which are driven by a clear national strategy for golf.

"The value of the programme cannot be stressed too highly. The sheer intensity has acted as a catalyst for us to create a more professional structure and effective task prioritisation. Our Strategic Plan, which was inspired by the programme speakers, is proving crucial in the development of golf at national and local level in Ukraine, including better communication between stakeholders and a pleasing growth in participation (especially by women)."

Tetiana Rybchenko, Board Member, Ukrainian Golf Federation

Ukraine



UKRAINIAN GOLF FEDERATION

39 Pushkinskaya St., Suite 38 - 01004, Kyiv, Ukraine

info@ukrgolf.org
+380442793763
www.ukrgolf.org

President: Oleg Korban
CEO / Secretary: Alena Tereshchuk

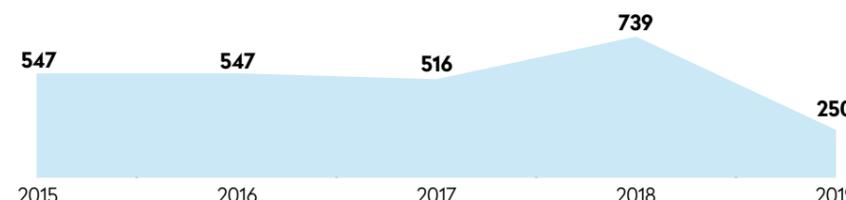
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44,622,516
Total population

250 / 0.0%
Registered golfers / % of population

36
Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



-66.2% ↓ **-54.3%** ↓
% Change ('19 v '18) % Change ('19 v '15)

181 / 79%
Adult male registered golfers
/ % of adult registered golfers

47 / 21%
Adult female registered golfers
/ % of adult registered golfers

24
National squad / elite player
& development squad golfers

22 / 9%
Junior registered golfers
/ % of total registered golfers

7
Total golf courses
(Golf Around the World)

3 / 4
Total affiliated golf courses
9-hole / 18-hole

1
Other golf courses
(multi-hole combinations)

Wales



WALES GOLF

Catsash, Newport, Gwent, NP18 1JQ, Wales

office@golfunionwales.org
+441633436040
www.walesgolf.org

President: Mike Bryant
CEO / Secretary: Richard Dixon

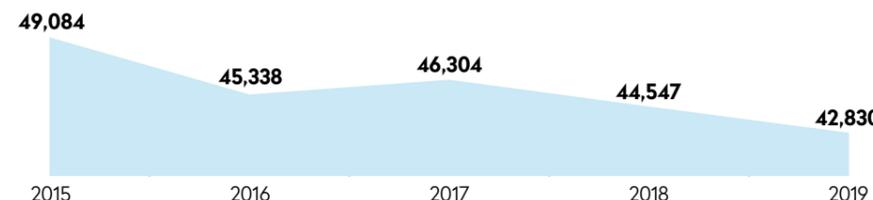
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3,183,600
Total population

42,830 / 1.3%
Registered golfers / % of population

230
Registered golfers per course
(Golf Around the World courses)

Registered golfers – change over time



-3.9% ↓ **-12.7%** ↓
% Change ('19 v '18) % Change ('19 v '15)

34,603 / 87%
Adult male registered golfers
/ % of adult registered golfers

5,221 / 13%
Adult female registered golfers
/ % of adult registered golfers

51
National squad / elite player
& development squad golfers

3,006 / 7%
Junior registered golfers
/ % of total registered golfers

186
Total golf courses
(Golf Around the World)

21 / 118
Total affiliated golf courses
9-hole / 18-hole

3
Other golf courses
(multi-hole combinations)

National Federation Statistic Summary.

The following tables rank and detail the national federation supplied statistics to show comparability across The R&A European affiliates and EGA members.

Registered Golfers – ranked from highest to lowest absolute numbers.

Market	Absolute #
Germany	642,240
England	629,000
Sweden	484,373
France	412,726
Netherlands	389,000
Spain	305,417
Ireland	184,017
Scotland	180,281
Denmark	149,044
Finland	138,955
Austria	97,930
Norway	95,794
Italy	91,165
Switzerland	89,236
Belgium	65,028
Czech	53,252
Wales	42,830
Iceland	17,165
Portugal	15,257
Slovakia	8,264
Turkey	6,739
Poland	6,268
Slovenia	4,574
Luxembourg	3,392
Estonia	2,735
Russia	2,240
Latvia	1,660
Cyprus	1,377
Lithuania	1,354
Hungary	1,311
Liechtenstein	1,025
Kazakhstan	1,020
Greece	829
Romania	817
Bulgaria	775
Serbia	747
Croatia	694
Malta	583
Israel	544
Andorra	445
Ukraine	250
Bosnia and Herzegovina	207
Belarus	176
Azerbaijan	171
Georgia	155
Armenia	110
Republic of North Macedonia	48

Registered Golfers per Course (Golf Around the World) – ranked from highest to lowest golfers per course.

Market	Absolute #
Netherlands	1,179
Switzerland	783
Sweden	732
Finland	728
Luxembourg	678
Spain	615
Germany	612
Malta	583
Belgium	537
France	513
Norway	502
Austria	478
Denmark	431
Czech	403
Serbia	374
Ireland	373
Slovenia	327
Scotland	294
Italy	284
England	277
Estonia	274
Israel	272
Slovakia	250
Iceland	238
Wales	230
Andorra	223
Turkey	204
Lithuania	193
Cyprus	153
Portugal	144
Latvia	128
Poland	126
Kazakhstan	113
Armenia	110
Bosnia and Herzegovina	104
Romania	102
Croatia	99
Greece	92
Belarus	88
Russia	86
Bulgaria	78
Hungary	77
Azerbaijan	57
Georgia	52
Ukraine	36
Liechtenstein	N/A
Republic of North Macedonia	N/A

Adult male registered golfers – showing absolute and % of adult golfers.

Market	% #	Absolute #
Latvia	91%	1,310
Azerbaijan	89%	136
Israel	88%	466
Republic of North Macedonia	88%	35
Scotland	87%	143,403
Wales	87%	34,603
England	86%	525,215
Belarus	83%	125
Greece	83%	522
Bulgaria	82%	568
Georgia	81%	110
Bosnia and Herzegovina	81%	135
Andorra	80%	325
Croatia	80%	512
Serbia	80%	437
Ukraine	79%	181
Portugal	79%	11,195
Romania	78%	584
Poland	78%	4,159
Ireland	78%	127,000
Norway	76%	67,697
Italy	75%	60,482
Kazakhstan	75%	600
Armenia	75%	45
Cyprus	75%	974
Malta	75%	383
Hungary	74%	896
Lithuania	74%	954
France	73%	271,216
Russia	72%	1,302
Sweden	72%	315,977
Spain	71%	193,804
Slovakia	71%	5,316
Finland	70%	88,620
Denmark	70%	100,037
Estonia	70%	1,810
Czech	70%	32,734
Turkey	70%	2,788
Slovenia	68%	2,933
Netherlands	67%	253,000
Iceland	67%	10,427
Luxembourg	67%	2,033
Belgium	66%	38,442
Liechtenstein	64%	616
Switzerland	64%	53,302
Germany	63%	380,205
Austria	60%	53,649

Adult female registered golfers – showing absolute and % of adult golfers.

Market	% #	Absolute #
Austria	40%	35,174
Germany	37%	220,630
Switzerland	36%	30,537
Liechtenstein	36%	345
Belgium	34%	19,881
Luxembourg	33%	998
Iceland	33%	5,101
Netherlands	33%	123,000
Slovenia	32%	1,397
Turkey	30%	1,190
Czech	30%	13,923
Estonia	30%	767
Denmark	30%	42,001
Finland	30%	37,168
Slovakia	29%	2,186
Spain	29%	77,300
Sweden	28%	121,552
Russia	28%	497
France	27%	102,051
Lithuania	26%	336
Hungary	26%	315
Malta	25%	131
Cyprus	25%	329
Kazakhstan	25%	200
Armenia	25%	15
Italy	25%	19,668
Norway	24%	20,870
Ireland	22%	36,017
Poland	22%	1,154
Romania	22%	161
Portugal	21%	2,934
Ukraine	21%	47
Serbia	20%	110
Croatia	20%	128
Andorra	20%	80
Bosnia And Herzegovina	19%	32
Georgia	19%	25
Bulgaria	18%	128
Greece	17%	106
Belarus	17%	25
England	14%	84,915
Wales	13%	5,221
Scotland	13%	21,364
Republic Of North Macedonia	13%	5
Israel	12%	62
Azerbaijan	11%	17
Latvia	9%	130

Junior registered golfers – showing absolute and % of total golfers.

Market	% #	Absolute #
Armenia	45%	50
Turkey	41%	2,761
Serbia	27%	200
Greece	24%	201
Kazakhstan	22%	220
Russia	20%	441
Bosnia And Herzegovina	19%	40
Republic Of North Macedonia	17%	8
Belarus	15%	26
Latvia	13%	220
Iceland	13%	2,318
Georgia	13%	20
Czech	12%	6,595
Italy	12%	11,015
Malta	12%	69
Ireland	11%	21,000
Spain	11%	34,313
Luxembourg	11%	361
Azerbaijan	11%	18
Poland	10%	618
Belgium	10%	6,705
Bulgaria	10%	79
Sweden	10%	46,844
France	10%	39,459
Finland	9%	13,167
Austria	9%	9,107
Slovakia	9%	762
Andorra	9%	40
Romania	9%	72
Ukraine	9%	22
Scotland	9%	15,514
Croatia	8%	54
Hungary	8%	100
Norway	8%	7,227
Portugal	7%	1,128
Wales	7%	3,006
Germany	6%	41,405
Liechtenstein	6%	64
Switzerland	6%	5,397
Estonia	6%	158
Cyprus	5%	74
Slovenia	5%	244
Lithuania	5%	64
Denmark	5%	7,006
Netherlands	3%	13,000
England	3%	18,870
Israel	3%	16

National squad / elite player and development squad golfers.

Market	Absolute #
Andorra	7
Armenia	0
Austria	70
Azerbaijan	0
Belarus	19
Belgium	0
Bosnia And Herzegovina	0
Bulgaria	23
Croatia	7
Cyprus	0
Czech	45
Denmark	45
England	35
Estonia	12
Finland	50
France	27
Georgia	5
Germany	60
Greece	28
Hungary	20
Iceland	120
Ireland	36
Israel	0
Italy	0
Kazakhstan	0
Latvia	26
Liechtenstein	0
Lithuania	17
Luxembourg	0
Malta	7
Netherlands	0
Norway	65
Poland	0
Portugal	0
Republic Of North Macedonia	0
Romania	0
Russia	50
Scotland	66
Serbia	8
Slovakia	30
Slovenia	0
Spain	56
Sweden	0
Switzerland	190
Turkey	56
Ukraine	24
Wales	51

Golf Courses (Golf Around the World).

Market	Absolute #
England	2,270
Germany	1,050
France	804
Sweden	662
Scotland	614
Spain	497
Ireland	494
Denmark	346
Netherlands	330
Italy	321
Austria	205
Finland	191
Norway	191
Wales	186
Czech	132
Belgium	121
Switzerland	114
Portugal	106
Iceland	75
Poland	47
Slovakia	33
Turkey	33
Russia	26
Hungary	17
Slovenia	14
Latvia	13
Bulgaria	10
Estonia	10
Cyprus	9
Greece	9
Kazakhstan	9
Romania	8
Croatia	7
Lithuania	7
Ukraine	7
Luxembourg	5
Azerbaijan	3
Georgia	3
Belarus	2
Andorra	2
Bosnia And Herzegovina	2
Serbia	2
Israel	2
Malta	1
Armenia	1
Republic Of North Macedonia	0
Liechtenstein	N/A

Glossary.

The information included in the federation statistics has been provided by the national federation or sourced from recognised international or European established sources.

The source of the national population figures are the World Bank Data (2018) and the Office for National Statistics (for UK home nations).

The definitions of the key performance indicators follow.

TOTAL POPULATION

The national population figures (World Bank 2018).

REGISTERED GOLFERS

Total golfers, adult and junior, who are affiliated to the national federation. This reflects those golfers who are either a member of a golf club, or who have joined or registered separately with the national federation for the purposes of obtaining a handicap or an official playing accreditation.

Where registered golfers are shown in italics – this is due to data not being provided by the federation for that year, and an estimate has been made, or the latest number extended from previous years.

% OF POPULATION

Registered golfers as a percentage of the population illustrate the penetration of golf within each country.

REGISTERED GOLFERS PER COURSE (Golf Around the World Courses)

Total registered golfers per course calculated from The R&A's report on courses – 'Golf Around the World' – showing total courses per country. Provides a comparative measure of demand and usage from affiliated golfers per golf course for the federation in each country.

% CHANGE ('19 v '18) / ('19 v '15)

Change in the number of registered golfers over time comparing 2019 to the last year (2018) and over the last five years – expressed as a percentage.

NATIONAL SQUAD / ELITE PLAYER & DEVELOPMENT SQUAD GOLFERS

Number of absolute players in the national squads, on the elite development squad programmes including national teams from adult, senior to junior players run by the national federation.

ADULT MALE REGISTERED GOLFERS / ADULT FEMALE REGISTERED GOLFERS

Absolute number of adult male and female golfers registered or affiliated to the national federation.

% OF ADULT REGISTERED GOLFERS

Male / female split of the absolute number of adult male and female golfers to indicate the penetration of golf amongst the male-&-female adult genders. Indicative of the approach towards achieving equality in participation and creation of a family sport in the market.

JUNIOR REGISTERED GOLFERS / % of TOTAL REGISTERED GOLFERS

Absolute number of junior golfers registered or affiliated to the national federation, and calculated as a percentage of total registered golfers. Indicative of the approach towards broadening the appeal of the sport to a younger generation, and towards achieving equality in participation and creation of a family sport in the market.

TOTAL GOLF COURSES (Golf Around the World)

Total golf courses per country as monitored and measured through The R&A 'Golf Around the World' programme carried out in association with the NGF (National Golf Foundation).

The country totals will include those courses not affiliated to the national federations. Used as the golf course variable in the calculation of total registered golfers per course.

TOTAL 9-HOLE GOLF COURSES

Number of 9-hole golf courses affiliated to the national federation. A good measure of facilities from starter venues to established stand-alone 9-hole golf courses.

TOTAL 18-HOLE GOLF COURSES

Number of 18-hole golf courses affiliated to the national federation.

OTHER GOLF COURSES (Multi-hole combinations)

Number of other golf courses affiliated to the national federation which may have a different number of hole combinations. This could be a 6-hole golf course, or a venue with 36 holes (2 x 18 holes or 4 x 9 holes), or 45 holes. The number of golf courses cannot be used to directly calculate the number of holes at each venue or in total.

NOTE – Federation Statistics. Where a federation has not provided an updated figure for 2019 or is missing a previous year's figure, then the most recent number submitted has been repeated. This is shown by the number being in *italics*. If a federation fact or figure is not available – then this has been detailed 'n/a' in the national statistics.

For clarification, the total sum of 9-hole, 18-hole and Other Golf Courses affiliated to the national federation may not equal the absolute number of golf courses from the Golf Around the World monitor.

(1) "Economic Impact of Golf on the Economy of Europe" Published 2013 on behalf of the PGA of GB&I (Source: SPORTS MARKETING SURVEYS INC.)

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