



European Golf Participation 2024.

2023 estimates
August 2024



4.7M

Registered golfers in Europe

8.4M

Unregistered 9 & 18 hole golfers in Europe

19.7M

Adults engaged with golf in Europe

9%

Rise in registered golfers in Europe since 2020

8,978

Golf courses in Europe

57%

Of the registered golfers in The R&A's jurisdiction are in Europe
(The R&A's jurisdiction total: 8.2m)

32%

Of total golf engagement in The R&A's jurisdiction is in Europe
(The R&A's jurisdiction total: 62.3m)

About the process.

As in previous years, we have gathered information from national associations around the world to feed in to the extrapolation model. This information has come through access granted by the EGA to its member data portal and through the survey distributed by The R&A to its Affiliates.

For the 2023 estimates, we asked for national associations to provide a greater level of information than they had done previously, and many were able to share their own estimates of total engagement and the number of 9 & 18 hole golfers overall in addition to the metrics about registered golfers.

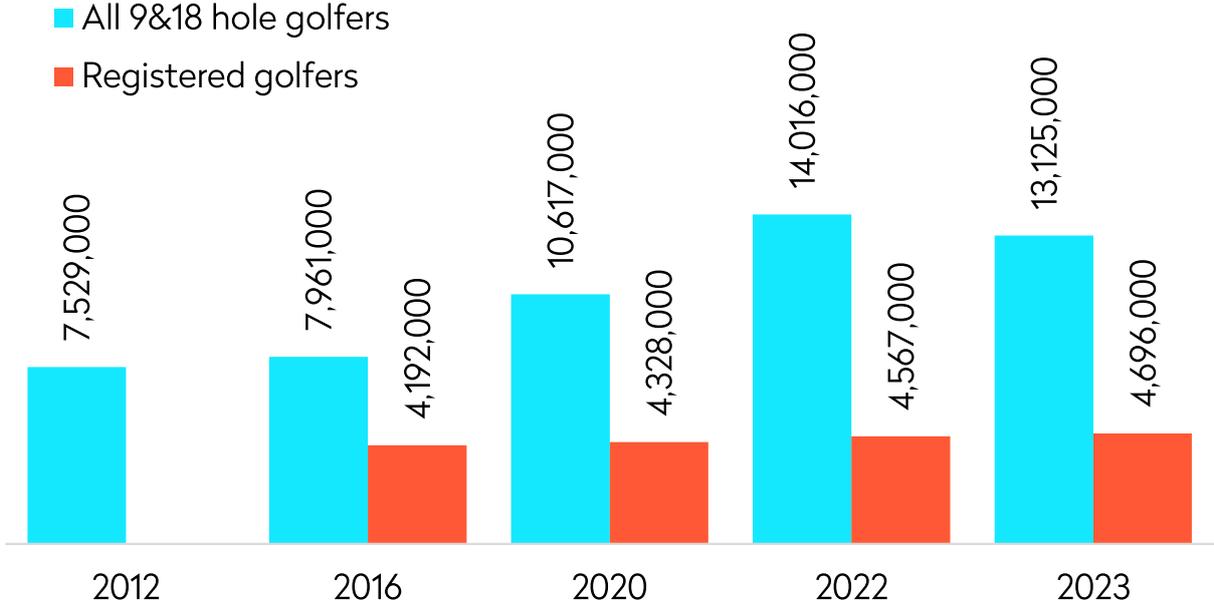
Our estimates have been influenced by this additional information, which in some cases may show engagement in golf appearing to decrease in particular markets. These changes are a result of the model and the process being refined and becoming more accurate due to a larger volume of historical information and the provision of additional total engagement estimates by some Affiliates.

For the 2023 estimates, we received input from 94 national associations around the world. For those not submitting information we have estimated in line with their previous data, with an adjustment for change in population size.

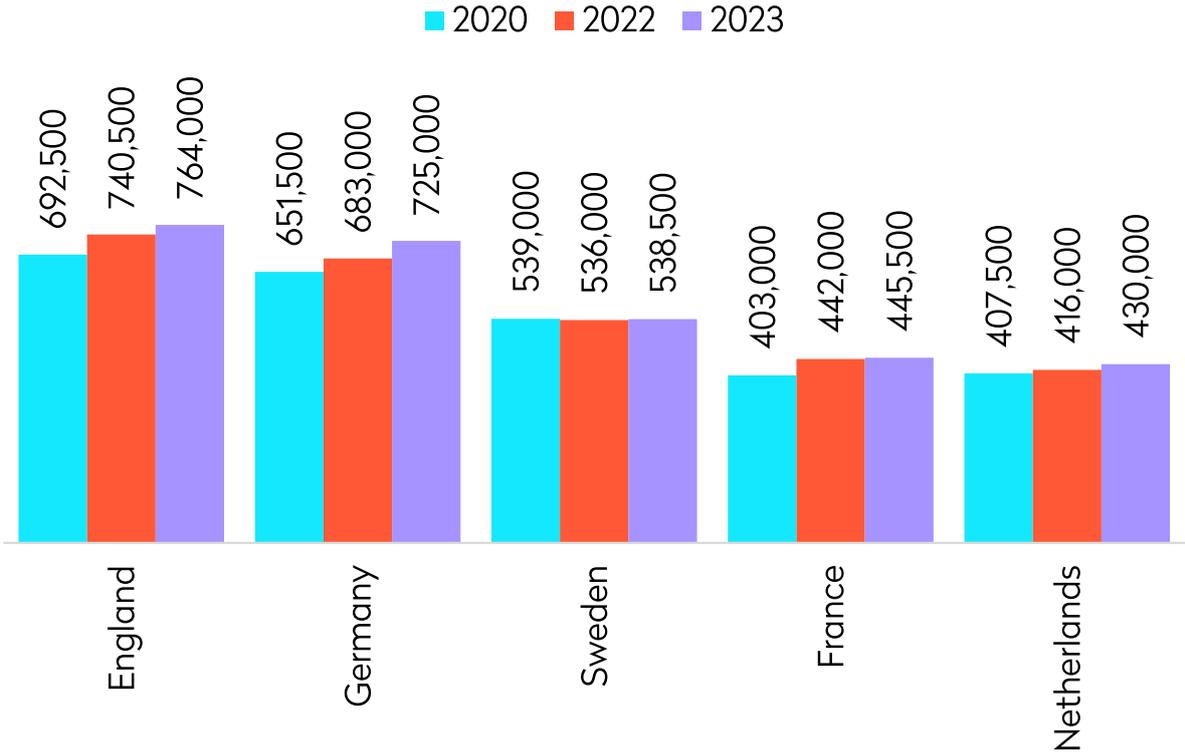


Europe.

Number of Registered and 9 & 18 hole golfers by year



Top 5 markets for Registered Golfers



Please note: Some tables and charts show rounded figures. Figures were rounded after calculations were carried out.



Europe.

| Country | Total population | Registered golfers Total 2023 | Registered golfers – Men 2023 | Registered golfers – Women 2023 | Registered golfers – Juniors 2023 | All 9 & 18 hole golfers (incl registered and independent) 2023 | Number of 9 or 18 hole golf courses | Average number of users per course |
|------------------------|------------------|-------------------------------|-------------------------------|---------------------------------|-----------------------------------|--|-------------------------------------|------------------------------------|
| Albania | 2,777,689 | 77 | 69 | 5 | 3 | 400 | 1 | 360 |
| Andorra | 79,824 | 514 | 325 | 105 | 84 | 2,000 | 2 | 1,081 |
| Armenia | 2,780,469 | 50 | 15 | 5 | 30 | 100 | 1 | 127 |
| Austria | 9,041,851 | 128,472 | 88,802 | 32,955 | 6,715 | 256,500 | 202 | 1,271 |
| Belarus | 9,228,071 | 770 | 429 | 215 | 126 | 1,500 | 2 | 776 |
| Belgium | 11,685,814 | 77,960 | 46,884 | 23,612 | 7,464 | 152,000 | 124 | 1,228 |
| Bosnia and Herzegovina | 3,233,526 | 208 | 130 | 35 | 43 | 800 | 2 | 420 |
| Bulgaria | 6,465,097 | 977 | 634 | 182 | 161 | 1,500 | 11 | 123 |
| Croatia | 3,855,600 | 802 | 612 | 131 | 59 | 1,000 | 6 | 191 |
| Cyprus | 1,251,488 | 1,093 | 836 | 226 | 31 | 1,500 | 12 | 107 |
| Czech Republic | 10,672,118 | 51,445 | 31,521 | 13,091 | 6,833 | 98,500 | 135 | 729 |
| Denmark | 5,903,037 | 163,024 | 111,542 | 44,083 | 7,399 | 327,000 | 351 | 932 |
| England | 57,106,398 | 763,850 | 642,474 | 89,829 | 31,547 | 3,735,000 | 2,423 | 1,542 |
| Estonia | 1,348,840 | 3,888 | 2,257 | 1,229 | 402 | 7,500 | 12 | 630 |
| Finland | 5,556,106 | 155,584 | 99,907 | 38,873 | 16,804 | 302,000 | 188 | 1,605 |
| France | 67,971,311 | 445,306 | 295,348 | 107,111 | 42,847 | 1,884,000 | 815 | 2,311 |
| Georgia | 3,712,502 | 261 | 202 | 43 | 16 | 1,000 | 3 | 400 |
| Germany | 83,797,985 | 724,985 | 439,793 | 242,333 | 42,859 | 1,904,500 | 1,068 | 1,783 |
| Greece | 10,426,919 | 1,040 | 550 | 150 | 340 | 3,500 | 10 | 372 |
| Hungary | 9,643,048 | 2,278 | 1,690 | 386 | 202 | 4,500 | 16 | 294 |
| Iceland | 382,003 | 24,210 | 13,730 | 7,220 | 3,260 | 53,500 | 71 | 750 |
| Ireland | 7,037,713 | 222,243 | 158,432 | 40,127 | 23,684 | 628,500 | 357 | 1,761 |
| Italy | 58,940,425 | 93,267 | 63,679 | 20,533 | 9,055 | 182,000 | 308 | 591 |
| Kosovo | 1,761,985 | 81 | 71 | 7 | 3 | 400 | 1 | 380 |
| Latvia | 1,879,383 | 1,326 | 902 | 279 | 145 | 6,000 | 11 | 532 |

Europe.

...continued

| Country | Total population | Registered golfers Total 2023 | Registered golfers – Men 2023 | Registered golfers – Women 2023 | Registered golfers – Juniors 2023 | All 9 & 18 hole golfers (incl registered and independent) 2023 | Number of 9 or 18 hole golf courses | Average number of users per course |
|-------------------------|--------------------|-------------------------------|-------------------------------|---------------------------------|-----------------------------------|--|-------------------------------------|------------------------------------|
| Liechtenstein | 39,327 | 1,555 | 919 | 521 | 115 | 3,000 | 0 | - |
| Lithuania | 2,831,639 | 1,178 | 797 | 267 | 114 | 5,500 | 7 | 751 |
| Luxembourg | 653,103 | 3,246 | 1,941 | 899 | 406 | 6,000 | 5 | 1,248 |
| Malta | 531,113 | 627 | 428 | 114 | 85 | 2,500 | 1 | 2,703 |
| Moldova* | 2,538,894 | 133 | 83 | 18 | 32 | 300 | 1 | 330 |
| Netherlands | 17,700,982 | 429,882 | 279,644 | 132,561 | 17,677 | 644,000 | 349 | 1,846 |
| Norway | 5,457,127 | 136,205 | 94,581 | 25,320 | 16,304 | 262,500 | 186 | 1,411 |
| Poland | 36,821,749 | 7,106 | 4,927 | 1,425 | 754 | 14,000 | 54 | 256 |
| Portugal | 10,409,704 | 18,133 | 13,232 | 3,478 | 1,423 | 35,500 | 113 | 316 |
| Rep. of North Macedonia | 2,057,679 | 38 | 35 | 3 | - | 100 | 1 | 110 |
| Romania | 19,047,009 | 1,498 | 1,087 | 320 | 92 | 3,000 | 9 | 332 |
| Russia | 144,236,933 | 3,900 | 2,191 | 1,053 | 656 | 7,500 | 29 | 252 |
| San Marino | 33,660 | 153 | 85 | 18 | 50 | 500 | 1 | 548 |
| Scotland | 5,447,700 | 210,178 | 164,911 | 22,345 | 22,922 | 967,000 | 560 | 1,726 |
| Serbia | 6,664,449 | 821 | 570 | 150 | 101 | 3,500 | 2 | 1,790 |
| Slovakia | 5,431,752 | 8,015 | 5,025 | 2,046 | 944 | 11,000 | 33 | 332 |
| Slovenia | 2,111,986 | 6,405 | 4,584 | 1,555 | 265 | 14,000 | 17 | 825 |
| Spain | 47,778,340 | 299,400 | 192,386 | 70,554 | 36,460 | 598,500 | 486 | 1,231 |
| Sweden | 10,486,941 | 538,342 | 349,827 | 121,380 | 67,135 | 583,500 | 653 | 894 |
| Switzerland | 8,775,760 | 103,183 | 62,450 | 34,388 | 6,345 | 146,000 | 116 | 1,261 |
| Turkey | 84,979,913 | 6,471 | 3,766 | 1,706 | 999 | 13,000 | 32 | 404 |
| Ukraine | 38,000,000 | 2,523 | 1,437 | 669 | 417 | 4,500 | 7 | 677 |
| Wales | 3,131,640 | 53,019 | 43,531 | 5,515 | 3,973 | 243,500 | 184 | 1,324 |
| Total | 827,994,100 | 4,695,461 | 3,229,069 | 1,089,028 | 377,365 | 13,125,000 | 8,978 | 869 |
| Azerbaijan** | 10,141,756 | 154 | 131 | 15 | 8 | 500 | 3 | 238 |
| Israel** | 9,557,500 | 555 | 476 | 63 | 16 | 1,000 | 2 | 551 |
| Kazakhstan** | 19,621,972 | 1,320 | 598 | 107 | 615 | 4,000 | 9 | 447 |

*Moldova is not a member of the EGA.

** Azerbaijan, Israel and Kazakhstan are not in continental Europe, but are members of the EGA.

Please note: Some tables and charts show rounded figures. Figures were rounded after calculations were carried out.

Glossary.

Global golfer number estimates

CALCULATING TOTAL ENGAGEMENT

This iteration of the Global Golf Participation estimates is only the second time that an estimate has been made for Total Golf Engagement based on anything other than the core recorded figures and estimates of total 9 & 18 hole golfers submitted by the national associations and estimated by other industry stakeholders. Our estimates are based on insight from nationally representative studies, and where these are not available, on our best estimate calculations.

For each market, the number of people participating in each type of engagement has been extrapolated using multipliers derived from national association estimates and The R&A's Golf Barometer, and each type of golf engagement has been calculated using an individual multiplier.

For the 2023 estimates we asked the national associations for their estimates of total golf engagement for the first time. These estimates have been taken into account during the calculation and calibration process.

PREVIOUS METRICS

Prior to 2022, we used the 'Total Golfers' metric - meaning all golfers who had played on a 9 or 18 hole golf course. In some markets (Japan, South Korea and Chinese Taipei), this also included golfers who only played on driving ranges and golf simulators, as the golf landscape in these markets suggests that these golfers are core to the sport. For the 2022 estimates and the 2023 estimates in this report, simulator and range use have not been included in the core 9 & 18 hole user figures, as our categories have been broadened and now include estimates for 'alternative only' golfers.

In 2022 we also recalculated totals for previous years to be comparable with this definition – this has an impact on the Asia totals for previous years and also the Global total, but the reworked historical figures remain as comparable as possible to the 2022 estimates and the 2023 estimates in this report.

DATA SOURCE

The numbers have been estimated by drawing on multiple sources:

- European numbers were submitted by individual national associations through the EGA Member Portal.
- ROW numbers were submitted by individual nations via a survey link circulated by The R&A.
- The 2023 R&A Golf Barometer was used to calculate multipliers to be able to project and calibrate the level of total adult engagement from the existing metrics provided by the affiliates. Where individual markets were included in the 2023 R&A Golf Barometer, consistent figures have been used for the Global Participation estimates.
- Where information is incomplete or inconsistent we have used previous estimates to balance information for a particular market.
- Golf course numbers are taken from the National Golf Foundation's 'Golf Around the World' service - International Golf Course Update December 2023.. In some instances we have used estimates from the national associations themselves, or other information.
- Population figures have been sourced from the World Bank's most recently available metrics (<https://data.worldbank.org/indicator/SP.POP.TOTL>) or local official figures where information is not available through this source.

Definitions & hierarchy - Adults

1. REGISTERED GOLFERS

These are the number of golfers who are affiliated to the federation (they may be members of golf clubs or affiliated to the federation in another way, eg through a direct subscription). This figure includes registered juniors for year-on-year and cross-market consistency in the majority of cases.

2. UNREGISTERED 9&18 HOLE GOLFERS

Golfers who have played on a full length 9 & 18 hole golf course at least once in the last year, but are not registered with their national association.

3. OTHER ON COURSE GOLFERS

People who have played an on course format that is not 9 or 18 holes – 6 hole or par 3 / short course golf, and have not played 9 & 18 hole golf.

4. ALTERNATIVE FORMAT ONLY GOLFERS

People who have played an alternative format of golf at least once in the past year but have not played an on-course format. Pitch & Putt, Putting green / putting experience, Adventure Golf (eg themed golf venue – Pirate Golf / Prehistoric Golf), Driving Range – with tracker technology, Driving Range – without tracker technology, Indoor Golf simulator (e.g. City Golf / Urban Golf), Golf on school pitches are included as alternative formats.

5. TOTAL ADULT ENGAGEMENT

People who have played any on-course or alternative format at least once in the past year.

Definitions & hierarchy - Juniors

1. REGISTERED JUNIOR GOLFERS

These are the number of junior golfers who are affiliated to the federation (they may be members of golf clubs or affiliated to the federation in another way, eg through a direct subscription).

2. TOTAL JUNIOR ENGAGEMENT

Junior golfers who have taken part in any format of golf in the past year, but are not affiliated to their national association. Included formats are: 18 hole, 9 hole, 6 hole, par 3 / short course, Pitch & putt, Putting green / putting experience, Adventure Golf (eg themed golf venue – Pirate Golf / Prehistoric Golf), Driving Range – with tracker technology, Driving Range – without tracker technology, Indoor Golf simulator (eg City Golf / Urban Golf), Golf on school pitches.



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