



European Golf Participation Report.

2023

R&A

EGA
European Golf Association

4.6M

registered 9 & 18 hole golfers

3.4M

more total 9 & 18 hole golfers
than in 2020

21.1M

people engaged with golf
in some form

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Introduction from Martin Slumbers, CEO, The R&A.

Welcome to The R&A European Golf Participation Report for 2023, providing an overview of the number and breakdown of golfers and golf courses in our affiliated national federations across Europe. This report focuses on Europe and is a companion to The R&A Global Golf Participation Report that covers R&A affiliates in Asia, Africa, Canada, the Caribbean, Central & South America, Europe, the Middle East and Oceania.

Greater participation is the shared goal of everyone involved in sport – and golf is no different in this regard. A continuous flow of people into golf is what safeguards the future, what supports commercial success and what provides the connections between players at all levels of the sport.

During the Covid-19 pandemic, golf was able to press its case to governments for being an activity that could be enjoyed safely outdoors. Consequently, many golf courses across the Continent were able to remain open. Even more importantly, golf was able to make its case to the public as an activity that could improve players' physical, mental and social health. Those are aspects of golf that The R&A has been promoting heavily for many years and we will continue to do so. One of the more positive societal shifts during the pandemic was in the greater value attached to

health. Being confined to our homes made many people realise just how important the outdoors, connection with their friends and playing sports that can provide a mental and physical challenge are to our day to day lives. Golf has benefited and continues to benefit from that trend.

The ongoing surge in golf participation in Europe seen in this report highlights that again. It also hints that those new habits picked up in the pandemic are becoming routine and that golf participation is, for so many people, finding a place in their new normal. Golf player numbers in Europe have grown, not just against 2020 data, but also steeply compared to 2016.

Speaking to many representatives from across Europe, it is clear that there is so much energy, passion and expertise pouring into the sport, whether through new ways of engaging golf's core audience, or through fresh ideas tailored



Martin Slumbers
CEO, The R&A

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to those who have followed less traditional paths into the sport. As I wrote in the global report, even with favourable social trends, this kind of growth does not just happen. The fruits of your labours can be seen in this report and also stand the sport in great stead for the future. Thank you to the EGA and all its members for what you have achieved in recent years as we all work to ensure the sport continues to thrive.

Introduction from Michael Thannhäuser, General Secretary of the EGA.

I join the rest of the EGA in welcoming the publication of this third edition of the European Golf Participation Report, produced in partnership with our friends at The R&A.

Collating data, understanding more about different types of golfers and tracking key trends in participation are important tasks that help guide initiatives to attract and retain golfers across Europe.

I am delighted to once again report an overall positive trend in participation in Europe and would like to commend all EGA member federations for successfully navigating the Covid-19 crisis and embracing new opportunities to attract new players to the game. Since 2020 there has been an increase of 5.6% in the number of registered golfers in Europe, and an increase of 32% in the number of 9 & 18 hole golfers overall, which demonstrates how the industry has endured and grown since the pandemic.

Europe's open societies and equal opportunities ensure that female participation is among the strongest worldwide – 13 of the 20 countries with the highest proportion of female golfers are located in Europe. Although there is more to do to encourage families and women to engage with golf, this is something to celebrate. Golf strives to provide playing opportunities for all, which is supported by The R&A's and the USGA's proactive approach in 2023 to modify the

rules of golf in consideration of players with disabilities.

As we look to the future, bringing more junior players into the game remains a top priority. The rise of new formats beyond traditional 9 & 18 hole rounds as well as the evolution of technology have become more important to consider in this endeavor and to create additional avenues to the game. As the facilitator of the World Handicap System in Europe, the EGA also hopes that a reduced minimum length requirement for golf courses to be WHS rated in the future will offer more golfers the opportunity to get a handicap and improve their game.

The future comes with challenges, including tighter regulation from EU policy makers for turf sports with yet unknown consequences. Communicating the positive impact of our sport to the public, including the effects on society, human health and socio-economic growth, will facilitate our joint advocacy for golf and help to ensure that it receives the regulatory framework it needs for overall participation to continue to strive.

I have no doubt that readers will find valuable information in the following pages of the European



Michael Thannhäuser
General Secretary of the EGA

“Collating data, understanding more about different types of golfers and tracking key trends in participation are important tasks that help guide initiatives to attract and retain golfers across Europe.”

Golf Participation Report. Thank you to all EGA member federations for taking the time to provide their data, and to The R&A for their remarkable work to support the game in Europe and worldwide.



Background.

The report on participation in Europe in 2023 is part of a programme from The R&A to gather and present participation from across all of its affiliated markets in a single year. Whilst this specific report focuses on Europe – the numbers are replicated in a global R&A report of affiliated markets around the world.

This report includes a change in the definitions of participation on a global basis. It reflects participation in all 9 & 18 hole formats – whether players are registered or unregistered. Golfers playing other formats of on-course golf and those taking part in alternative formats of golf off-course are also considered. This has enabled both a European report and a global report of total engagement in the sport. Data relating to the number of registered golfers, and estimates of the number of unregistered golfers, were provided by affiliates and analysed by independent agency Sporting Insights.

As for estimates in previous years, the number of registered golfers and the number of unregistered 9 & 18 hole golfers has been estimated (described collectively in this report as '9 & 18 hole

golfers'). This year we have established formal measurements as well as estimates of the broader reach of golf around the world, including alternative formats, that would not be accounted for through official channels.

To develop this measurement we have used information from The R&A's International Golf Barometer. The Barometer tracks all forms of golf engagement and participation in detail across nine international markets. Information from this source 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, leading to a broader evaluation of engagement than has been possible previously.

Where individual markets were included in the 2022 International

Golf Barometer, consistent figures have been used for the Global Golfer estimates. Where the information provided by affiliates is incomplete, we have used estimates to balance information for a particular market. Our estimates are based on insight from nationally representative studies, extrapolated to similar markets, and, where these are not available, on 'best' estimate calculations.

Countries reported in this report for Europe are based on the membership of the EGA and not completely on standard geographical region definition.

Where these countries are outside the standard geographical region definition, they have been included in the continental and regional totals of their location in The R&A Global Golf Participation Report 2023.

Europe Summary: Golf participation continues to thrive in the aftermath of the pandemic.

When this research was last reported in 2021, it was encouraging to identify a 'healthy increase' in golf participation. But, with Europe, like the rest of the world, reeling from the pandemic and people's working and playing habits changing, one question loomed in the background: could golf keep people's interest as life adapted to a new normal?





It is even more encouraging than to report, two years later, that in participation terms golf in Europe is healthier than ever. The number of golfers has grown further than the sport's stakeholders may have dared to hope. There are now 14 million 9 & 18 hole golfers in Europe, a number which represents a 32% growth in the last two years. In the previous report, we celebrated a growth of 34% in the four years since 2016. Europe has now achieved comparable growth in half the time. In fact, according to the new measurements, participation is now 76% up on 2016. Europe is not alone in achieving strong participation growth, although it should be noted that the continent's 32% growth in 9 & 18 hole players is higher than the global average of 15%.

The growth of golf, ongoing as it now appears to be, reflects what seem to be permanent changes to how people value and spend their leisure time. Moves towards working from home or hybrid working

practices have undoubtedly played their part, giving people more time in the week to play golf. Restrictions on movement, socialising, and exercise have also seemingly changed for the better and for good how people make time for pursuits that benefit their mental, physical and social wellbeing.

There will no doubt be fresh challenges in the coming years. The cost of living and inflation rates are rising across Europe, which will lead to difficult decisions about discretionary and leisure spend. The latest European Parliament Eurobarometer survey suggested that rising cost of living is the most pressing worry for 93% of Europeans. Short, medium and long-term, climate change will also exert pressure on golf courses and golfers. What the numbers in this report suggest though, is that European golf is arguably better placed to face up to whatever challenges may come than at any point in history.

32%

growth of 9 & 18 hole golfers in Europe, exceeding the global average of 15%

14.0M

9 & 18 hole golfers in Europe in 2022, compared to 10.6M in 2020

“Of all adult registered golfers in Europe, women make up at least 30% of adult registered golfers in 16 European markets.”

European golf participation in numbers.

Of all European markets: Top 10 markets by registered golfer numbers

Of the 19 European countries with more than 10,000 registered golfers:

- Norway and Iceland have seen the biggest percentage increases in registered golfer numbers since 2020.
- Norway's numbers have increased 17% since 2020, and Iceland's have increased 16%.

Country	Registered golfers 2022
England	740,673
Germany	682,942
Sweden	536,203
France	441,961
Netherlands	415,791
Spain	293,560
Ireland	218,972
Scotland	210,012
Denmark	163,865
Finland	154,415

Of all European markets: Top 10 markets by adult female registered golfer numbers

Amongst European countries with more than 10,000 registered golfers:

- Women's participation has increased the most in Iceland (23% increase) and Portugal (15% increase) since 2020.
- The representation of women amongst adult registered golfers is highest in Austria, Germany, Switzerland, Iceland and Belgium. In these five markets, women make up at least a third of adult registered golfers.

Country	Adult female registered golfers 2022
Germany	229,593
Netherlands	129,473
Sweden	126,430
France	106,921
England	86,659
Spain	69,242
Denmark	44,860
Ireland	40,526
Finland	39,488
Switzerland	34,312

Of all European markets: Top 10 markets by junior registered golfer numbers

Again looking at European countries with more than 10,000 registered golfers:

- Junior participation has increased the most in Norway (40% increase), Italy (33% increase) and Scotland (29% increase) since 2020.
- Juniors are most strongly represented in the Czech Republic (14% of all registered golfers), Iceland (14%), Spain (12%) and Sweden (12%).

Country	Junior registered golfers 2022
Sweden	62,620
Germany	44,277
France	43,154
Spain	36,520
England	33,256
Scotland	21,360
Netherlands	16,730
Finland	16,398
Ireland	15,779
Norway	14,166

Europe.

Region Summary

The growth of golf in Europe is part of an overall positive trend, with 4.6 million registered golfers and 9.4 million unregistered 9 & 18-hole golfers in Europe.

As well as the headline growth in 9 & 18 hole golfers, a wide range of metrics indicate the strength of the sport in Europe.

Total adult engagement, tracked for the first time in this year's report, shows over 21.1 million people in Europe engaging with golf. Looking at the global picture, this puts Europe second only narrowly behind Asia (22.5 million) among R&A affiliated regions.

In terms of female participation, 13 of the top 20 countries for female golfers as a proportion of registered players are European, with Austria, Liechtenstein, Germany, Switzerland and Estonia all featuring in the top ten.

As for junior golf participation, the outright percentages tend to be dominated by countries with fewer registered golfers. However, looking at countries with at least 5,000 registered golfers, the number of

junior golfers in Europe appears to be strong. Fifteen of the top 20 countries with the highest proportion of junior players among their registered golfers are in Europe, with that group including a mix of northern, eastern, central, western and southern European nations.

Looking at the proportion of national populations who play golf, Iceland, Scotland, Ireland and Sweden all appear in the top eight worldwide, with at least 10% of the population playing 9 or 18 hole golf.

Despite being smaller in terms of land area than other continents, Europe has many countries with a relatively high concentration of golf courses. England, Germany, France, Sweden and Scotland all appear in the top ten countries ordered by number of courses, with Spain, Ireland, the Netherlands, Denmark and Italy placed between 10th and 20th.

“Fifteen of the top 20 countries with the highest proportion of junior players among their registered golfers are in Europe, with that group including a mix of northern, eastern, central, western and southern European nations.”



4,567,000

registered golfers

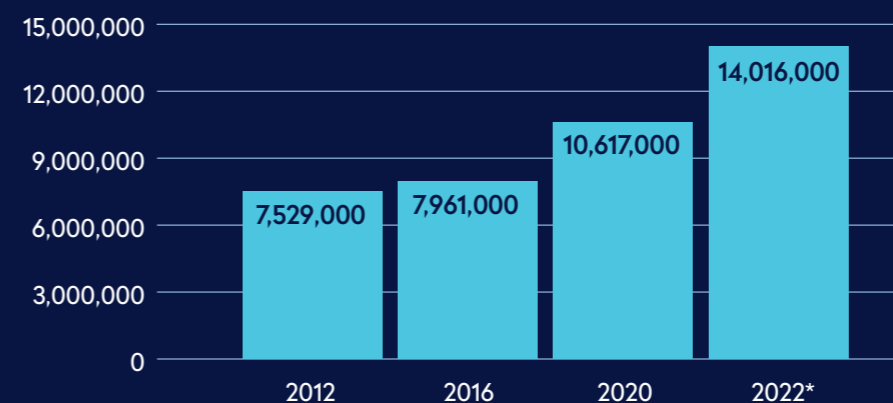
9,449,000

unregistered
9 & 18 hole golfers

21,103,000

total adult engagement
(including all formats)

Number of 9 & 18 hole golfers by year



*2022 was the first year of the International Golf Barometer, previous years' figures were sourced solely from the national associations and industry estimates.

Europe Market Summary.

Country	Total Population	Registered golfers 2022	Adult male registered golfers	Adult female registered golfers	Junior registered golfers	All 9 & 18 hole golfers (incl. registered and independent)	Number of golf courses	9 & 18 hole golfers per course
Andorra	79,034	448	288	88	72	900	2	450
Armenia**	2,790,974	50	15	5	30	90	1	90
Austria	8,955,797	96,878	56,021	34,276	6,581	194,000	204	951
Belarus	9,340,314	634	359	163	112	1,780	2	890
Belgium	11,592,952	77,830	46,340	23,646	7,844	156,000	122	1,279
Bosnia and Herzegovina	3,270,943	187	130	27	30	390	2	195
Bulgaria	6,877,743	955	621	176	158	2,130	10	213
Croatia	3,899,000	854	598	211	45	1,640	6	273
Cyprus	1,244,188	1,250	934	274	42	2,460	12	205
Czech Republic	10,505,772	52,730	32,005	13,407	7,318	106,000	133	797
Denmark	5,856,733	163,865	111,461	44,860	7,544	328,000	340	965
England	56,550,138	740,673	620,758	86,659	33,256	3,407,000	2,357	1,445
Estonia	1,330,932	3,831	2,232	1,229	370	8,000	11	727
Finland	5,541,017	154,415	98,529	39,488	16,398	308,000	189	1,630
France	67,749,632	441,961	291,886	106,921	43,154	1,459,000	815	1,790
Georgia**	3,708,610	248	191	39	18	500	4	125
Germany	83,196,078	682,942	409,072	229,593	44,277	2,117,000	1,053	2,010
Greece	10,641,221	1,190	650	200	340	1,790	10	179
Hungary	9,709,891	2,229	1,670	372	187	6,000	16	375
Iceland	372,520	23,292	13,200	6,875	3,217	68,000	71	958
Ireland	6,928,675	218,972	162,667	40,526	15,779	1,007,000	358	2,813
Israel**	9,364,000	544	466	62	16	1,080	1	1,080
Italy	59,109,668	94,046	63,292	20,799	9,955	544,000	311	1,781
Latvia	1,884,490	5,644	3,533	1,678	433	12,000	11	1,091

Country	Total Population	Registered golfers 2022	Adult male registered golfers	Adult female registered golfers	Junior registered golfers	All 9 & 18 hole golfers (incl. registered and independent)	Number of golf courses	9 & 18 hole golfers per course
Kazakhstan**	19,000,988	1,020	600	200	220	3,060	9	340
Liechtenstein	39,039	1,444	853	491	100	3,000	-	-
Lithuania	2,800,839	1,084	649	249	186	4,000	7	571
Luxembourg	640,064	3,523	2,089	1,022	412	7,000	5	1,400
Malta	518,536	614	433	108	73	1,220	1	1,220
Netherlands	17,533,044	415,791	269,588	129,473	16,730	832,000	350	2,377
Norway	5,408,320	129,872	90,485	25,221	14,166	257,000	187	1,374
Poland	37,747,124	6,652	4,566	1,319	767	14,000	56	250
Portugal	10,325,147	17,252	12,608	3,337	1,307	32,000	111	288
Republic of North Macedonia	2,065,092	38	35	3	-	110	1	110
Romania	19,119,880	1,504	1,091	321	92	3,000	9	333
Russia	143,449,286	3,574	2,029	930	615	7,000	28	250
San Marino	33,745	158	96	17	45	300	2	150
Scotland	5,466,000	210,012	166,363	22,289	21,360	966,000	560	1,725
Serbia	6,834,326	813	573	166	74	1,480	2	740
Slovakia	5,447,247	9,878	6,018	2,580	1,280	20,000	33	606
Slovenia	2,108,079	6,393	4,576	1,552	265	14,000	17	823
Spain	47,415,750	293,560	187,798	69,242	36,520	588,000	486	1,210
Sweden	10,415,811	536,203	347,153	126,430	62,620	1,072,000	661	1,622
Switzerland	8,703,405	102,128	61,612	34,312	6,204	204,000	117	1,744
Turkey	84,775,404	6,371	3,708	1,680	983	12,000	33	364
Ukraine	43,792,855	2,450	1,385	658	407	4,000	6	667
Wales	3,169,586	53,086	43,901	5,637	3,548	244,000	184	1,326

** Georgia, Israel, Armenia and Kazakhstan are members of the EGA, but figures for these markets are not included in the European totals

R&A Affiliate Countries Statistical Summary

The following tables rank and detail the national federation supplied statistics and numbers from the International Golf Barometer, supported by best estimates where country numbers are incomplete, to show comparability across The R&A's affiliates in Europe.

Registered golfers – showing absolute numbers for 2020 and 2022 and % change. Ranked from highest to lowest 2022 absolute numbers.

Market	Registered golfers 2020	Registered golfers 2022	All registered golfer % change 2020 to 2022
England	692,500	740,673	7%
Germany	651,417	682,942	5%
Sweden	538,962	536,203	-1%
France	402,991	441,961	10%
Netherlands	407,302	415,791	2%
Spain	270,040	293,560	9%
Ireland	202,750	218,972	8%
Scotland	192,724	210,012	9%
Denmark	154,803	163,865	6%
Finland	157,175	154,415	-2%
Norway	111,301	129,872	17%
Switzerland	95,717	102,128	7%
Austria	93,718	96,878	3%
Italy	87,380	94,046	8%
Belgium	76,381	77,830	2%
Wales	47,852	53,086	11%
Czech Republic	52,401	52,730	1%
Iceland	20,000	23,292	16%
Portugal	15,297	17,252	13%
Slovakia	8,566	9,878	15%
Poland	6,562	6,652	1%
Slovenia	6,393	6,393	0%
Turkey	4,536	6,371	40%
Latvia	4,804	5,644	17%
Estonia	3,637	3,831	5%
Russia	2,641	3,574	35%
Luxembourg	3,523	3,523	0%
Ukraine	1,837	2,450	33%
Hungary	2,409	2,229	-7%
Romania	1,504	1,504	0%
Liechtenstein	1,210	1,444	19%
Cyprus	1,016	1,250	23%
Greece	910	1,190	31%
Lithuania	2,108	1,084	-49%
Kazakhstan**	1,020	1,020	0%
Bulgaria	870	955	10%
Croatia	627	854	36%
Serbia	818	813	-1%
Belarus	355	634	79%
Malta	599	614	3%
Israel**	544	544	0%
Andorra	419	448	7%
Georgia**	155	248	60%
Bosnia and Herzegovina	187	187	0%
San Marino	209	158	-24%
Armenia**	75	50	-33%
Republic of North Macedonia	74	38	-49%
TABLE TOTAL	4,328,319	4,569,088	6%

** Georgia, Israel, Armenia and Kazakhstan are members of the EGA, but figures for these markets are not included in the European totals

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

Country	Registered Golfers per Course 2022
Netherlands	1,188
Switzerland	873
Finland	817
Sweden	811
Luxembourg	705
Norway	695
Germany	649
Belgium	638
Malta	614
Ireland	612
Spain	604
Israel**	544
France	542
Latvia	513
Denmark	482
Austria	475
Ukraine	408
Serbia	407
Czech Republic	396
Slovenia	376
Scotland	375
Estonia	348
Iceland	328
Belarus	317
England	314
Italy	302
Slovakia	299
Wales	289
Andorra	224
Turkey	193
Romania	167
Lithuania	155
Portugal	155
Croatia	142
Hungary	139
Russia	128
Poland	119
Greece	119
Kazakhstan**	113
Cyprus	104
Bulgaria	96
Bosnia and Herzegovina	94
San Marino	79
Georgia**	62
Armenia**	50
Republic of North Macedonia	38
Liechtenstein	-

** Georgia, Israel, Armenia and Kazakhstan are members of the EGA, but figures for these markets are not included in the European totals

All 9 & 18 hole golfers - showing absolute number of 9 & 18 hole golfers (registered and independent) and % of the total population. Ranked from highest to lowest 2022 absolute numbers.

Country	All 9 & 18 hole golfers as a % of population 2022	All 9 & 18 hole golfers (incl. registered and independent) 2022
Iceland	18%	68,000
Scotland	18%	966,000
Ireland	15%	1,007,000
Sweden	10%	1,072,000
Wales	8%	244,000
Liechtenstein	8%	3,000
England	6%	3,407,000
Denmark	6%	328,000
Finland	6%	308,000
Norway	5%	257,000
Netherlands	5%	832,000
Germany	3%	2,117,000
Switzerland	2%	204,000
Austria	2%	194,000
France	2%	1,459,000
Belgium	1%	156,000
Spain	1%	588,000
Andorra	1%	900
Luxembourg	1%	7,000
Czech Republic	1%	106,000
Italy	1%	544,000
San Marino	0.9%	300
Slovenia	0.7%	14,000
Latvia	0.6%	12,000
Estonia	0.6%	8,000
Slovakia	0.4%	20,000
Portugal	0.3%	32,000
Malta	0.2%	1,220
Cyprus	0.2%	2,460
Lithuania	0.1%	4,000
Hungary	0.1%	6,000
Croatia	-	1,640
Poland	-	14,000
Bulgaria	-	2,130
Serbia	-	1,480
Belarus	-	1,780
Greece	-	1,790
Kazakhstan**	-	3,060
Romania	-	3,000
Turkey	-	12,000
Georgia**	-	500
Bosnia and Herzegovina	-	390
Israel**	-	1,080
Ukraine	-	4,000
Republic of North Macedonia	-	110
Russia	-	7,000
Armenia**	-	90

Adult male registered golfers – showing absolute numbers for 2020 and 2022, % change and proportion of adult registered golfers that are male. Ranked by % of all adult registered golfers.

Country	Adult male registered golfers 2020	Adult male registered golfers 2022	Adult male registered golfer % change 2020 to 2022	Adult male registered golfers as a % of adult registered golfers 2022
Republic of North Macedonia	60	35	-42%	92%
Wales	39,200	43,901	12%	89%
Israel**	466	466	0%	88%
Scotland	154,571	166,363	8%	88%
England	556,589	620,758	12%	88%
San Marino	140	96	-31%	85%
Georgia**	110	191	74%	83%
Bosnia and Herzegovina	130	130	0%	83%
Hungary	1,652	1,670	1%	82%
Ireland	148,000	162,667	10%	80%
Malta	430	433	1%	80%
Portugal	11,265	12,608	12%	79%
Norway	78,481	90,485	15%	78%
Bulgaria	592	621	5%	78%
Poland	4,571	4,566	0%	78%
Serbia	577	573	-1%	78%
Cyprus	759	934	23%	77%
Romania	1,091	1,091	0%	77%
Andorra	278	288	4%	77%
Greece	550	650	18%	76%
Italy	60,432	63,292	5%	75%
Kazakhstan**	600	600	0%	75%
Armenia**	25	15	-40%	75%
Slovenia	4,576	4,576	0%	75%
Croatia	467	598	28%	74%
Sweden	347,174	347,153	0%	73%
France	266,177	291,886	10%	73%
Spain	172,302	187,798	9%	73%
Lithuania	1,400	649	-54%	72%
Finland	99,482	98,529	-1%	71%
Denmark	105,134	111,461	6%	71%
Czech Republic	31,906	32,005	0%	70%
Slovakia	5,151	6,018	17%	70%
Turkey	2,674	3,708	39%	69%
Belarus	203	359	77%	69%
Russia	1,547	2,029	31%	69%
Latvia	3,032	3,533	17%	68%
Ukraine	1,046	1,385	32%	68%
Netherlands	267,563	269,588	1%	68%
Luxembourg	2,089	2,089	0%	67%
Belgium	45,082	46,340	3%	66%
Iceland	11,500	13,200	15%	66%
Estonia	2,128	2,232	5%	64%
Switzerland	57,452	61,612	7%	64%
Germany	388,340	409,072	5%	64%
Liechtenstein	713	853	20%	63%
Austria	53,921	56,021	4%	62%
TABLE TOTAL	2,931,628	3,125,127	7%	74%

** Georgia, Israel, Armenia and Kazakhstan are members of the EGA, but figures for these markets are not included in the European totals

Adult female registered golfers – showing absolute numbers for 2020 and 2022, % change and proportion of adult registered golfers that are female. Ranked by % of all adult registered golfers.

Country	Adult female registered golfers 2020	Adult female registered golfers 2022	Adult female registered golfer % change 2020 to 2022	Adult female registered golfers as a % of adult registered golfers 2022
Austria	33,163	34,276	3%	38%
Liechtenstein	426	491	15%	37%
Germany	221,865	229,593	3%	36%
Switzerland	32,762	34,312	5%	36%
Estonia	1,124	1,229	9%	36%
Iceland	5,600	6,875	23%	34%
Belgium	23,202	23,646	2%	34%
Luxembourg	1,022	1,022	0%	33%
Netherlands	125,537	129,473	3%	32%
Ukraine	496	658	33%	32%
Latvia	1,386	1,678	21%	32%
Russia	635	930	46%	31%
Belarus	84	163	94%	31%
Turkey	982	1,680	71%	31%
Slovakia	2,141	2,580	21%	30%
Czech Republic	13,579	13,407	-1%	30%
Denmark	42,161	44,860	6%	29%
Finland	40,568	39,488	-3%	29%
Lithuania	613	249	-59%	28%
Spain	63,987	69,242	8%	27%
France	98,265	106,921	9%	27%
Sweden	129,949	126,430	-3%	27%
Croatia	116	211	82%	26%
Slovenia	1,552	1,552	0%	25%
Kazakhstan**	200	200	0%	25%
Armenia**	10	5	-50%	25%
Italy	19,455	20,799	7%	25%
Greece	122	200	64%	24%
Andorra	91	88	-3%	23%
Romania	321	321	0%	23%
Cyprus	234	274	17%	23%
Serbia	167	166	-1%	22%
Poland	1,343	1,319	-2%	22%
Bulgaria	161	176	9%	22%
Norway	22,715	25,221	11%	22%
Portugal	2,896	3,337	15%	21%
Malta	125	108	-14%	20%
Ireland	36,000	40,526	13%	20%
Hungary	470	372	-21%	18%
Bosnia and Herzegovina	27	27	0%	17%
Georgia**	25	39	56%	17%
San Marino	19	17	-11%	15%
England	90,607	86,659	-4%	12%
Scotland	21,631	22,289	3%	12%
Israel**	62	62	0%	12%
Wales	5,400	5,637	4%	11%
Republic of North Macedonia	8	3	-63%	8%
TABLE TOTAL	1,043,304	1,078,811	3%	26%

** Georgia, Israel, Armenia and Kazakhstan are members of the EGA, but figures for these markets are not included in the European totals

Junior registered golfers – showing absolute numbers for 2020 and 2022, % change and proportion of all registered golfers that are juniors. Ranked by % of all registered golfers.

Country	Junior registered golfers 2020	Junior registered golfers 2022	Junior registered golfer % change 2020 to 2022	Junior registered golfers as a % of all registered golfers 2022
Armenia**	40	30	-25%	60%
Greece	238	340	43%	29%
San Marino	50	45	-10%	28%
Kazakhstan**	220	220	0%	22%
Belarus	68	112	65%	18%
Russia	459	615	34%	17%
Lithuania	95	186	96%	17%
Ukraine	295	407	38%	17%
Bulgaria	117	158	35%	17%
Andorra	50	72	44%	16%
Bosnia and Herzegovina	30	30	0%	16%
Turkey	880	983	12%	15%
Czech Republic	6,916	7,318	6%	14%
Iceland	2,900	3,217	11%	14%
Slovakia	1,274	1,280	0%	13%
Spain	33,751	36,520	8%	12%
Malta	44	73	66%	12%
Luxembourg	412	412	0%	12%
Sweden	61,839	62,620	1%	12%
Poland	648	767	18%	12%
Norway	10,105	14,166	40%	11%
Finland	17,125	16,398	-4%	11%
Italy	7,493	9,955	33%	11%
Scotland	16,522	21,360	29%	10%
Belgium	8,097	7,844	-3%	10%
France	38,549	43,154	12%	10%
Estonia	385	370	-4%	10%
Serbia	74	74	0%	9%
Hungary	287	187	-35%	8%
Latvia	386	433	12%	8%
Portugal	1,096	1,307	19%	8%
Georgia**	20	18	-10%	7%
Ireland	18,750	15,779	-16%	7%
Liechtenstein	71	100	41%	7%
Austria	6,634	6,581	-1%	7%
Wales	3,252	3,548	9%	7%
Germany	41,212	44,277	7%	6%
Romania	92	92	0%	6%
Switzerland	5,503	6,204	13%	6%
Croatia	44	45	2%	5%
Denmark	7,508	7,544	0%	5%
England	45,304	33,256	-27%	4%
Slovenia	265	265	0%	4%
Netherlands	14,202	16,730	18%	4%
Cyprus	23	42	83%	3%
Israel**	16	16	0%	3%
Republic of North Macedonia	6	-	-100%	0%
TABLE TOTAL	353,347	365,150	3%	8%

** Georgia, Israel, Armenia and Kazakhstan are members of the EGA, but figures for these markets are not included in the European totals

Glossary.

Global golfer number estimates

CALCULATING TOTAL ENGAGEMENT

This iteration of the Global Golfer Number Estimates is the first 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 – this is the first time that an estimate of on-course activity other than 9 & 18 hole play and alternative-only formats has been carried out. Our estimates are based on insight from nationally representative studies, and where these are not available, on 'best' estimate calculations.

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

PREVIOUS METRICS

Previously 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 in this report, simulator and range use have not been included in the core 9 & 18 hole user figures, as our categories are broader this year, and now include estimates for 'alternative only' golfers. We have 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 of 9 & 18 hole golfers.

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 2022 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 2022 Golf Barometer, consistent figures have been used for the Global Golfer estimates.
- Where information is incomplete 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 – updated December 2022.
- 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, such as 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 (eg 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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European Golf
Participation Report.
2023



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