# Golf Participation Report for Europe 2018

**Golf Advisory Practice in EMEA**

golfbenchmark.com

Photo by: Aidan Bradley
Old Head Golf Links, Hole 4 – Kinsale, Ireland

**Andrea Sartori**
**Partner**
**KPMG Global Head of Sports**

# Foreword

I am delighted to present the latest Golf Participation Report for Europe. In early 2018, KPMG's Golf Advisory Practice conducted a pan-European survey with local golf associations to better understand the state of golf participation and the supply of golf courses in 2017.

Last year our research for 2016 demonstrated that the European golf market had continued to stabilize in terms of numbers of registered golfers and golf courses in operation. In 2017, fortunately the stabilization process sustained, thus there were no significant changes in the demand and supply numbers.

Our comprehensive research shows that the number of registered golfers and affiliated golf courses slightly decreased, by 1.0% (-43,489) and 1.0% (-71). 39% of the European countries experienced a growth in participation rates, 37% showed stability and in 24% of the countries surveyed demand declined. Based on our survey, the gender mix of registered golfers hasn't changed since 2016, which means golf is still a male dominant (67%) sport in Europe, furthermore, the overall participation rate remained stable since 2015.

We are happy to announce that our report in 2018 also focuses on European professional players and provides some insights about the distribution and number of registered professionals across the old continent.

As per the last four years, we have put together the relevant data compiled directly from the respective golf associations across Europe. We would like to thank all of the golf associations and federations who contributed to the preparation of this report.

We hope that you will find our results both interesting and valuable. If you require any additional clarifications or if you wish to discuss our findings, please feel free to contact one of the members of our team in KPMG's Golf Advisory Practice or myself.

Yours sincerely,
**Andrea Sartori**

# Survey's Key Highlights

## Methodology

The data presented in this report is based on 2017 statistics which themselves represented the number of registered golfers and golf courses in Europe. This information was collected from the respective golf associations in Europe in the first half of 2018. This report only provides demand information related to registered golfers, as official statistics on the number of casual golfers (i.e. golfers not affiliated with clubs or associations) are currently not available. With regard to the supply of facilities, we have only considered golf courses with at least 9 holes to be of standard length and have excluded academy, shortened courses, par 3 and pitch & putt courses. Furthermore, when referring to golf courses, we refer to courses that are affiliated with their respective golf associations.

**In this report, a stable market is defined as one which has experienced a (±1%) change in its total number of registered golfers' year-on-year from 2016 to 2017.**

### Distribution of registered golfers in Europe, 2017

67% 25% 8%

### Total number of registered golfers in Europe, 2017

4,142,390

**Change since 2016: -1.0%**

**Status Stable: -43,489**

### Total number of standard golf courses in Europe, 2017

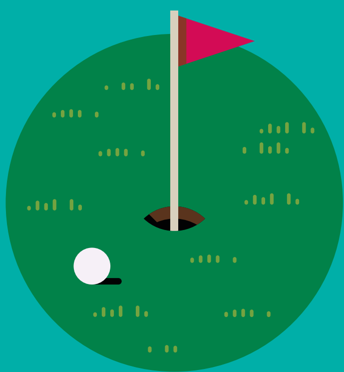
6,861

**-71 golf courses since 2016**

**-1.0%**

**18 built**

**89 closed**



### Proportion of European population who actively played golf in 2017

0.9%

**Remained stable since 2015**

### Type of change in participation rates of registered golfers in Europe, 2017 (see methodology)

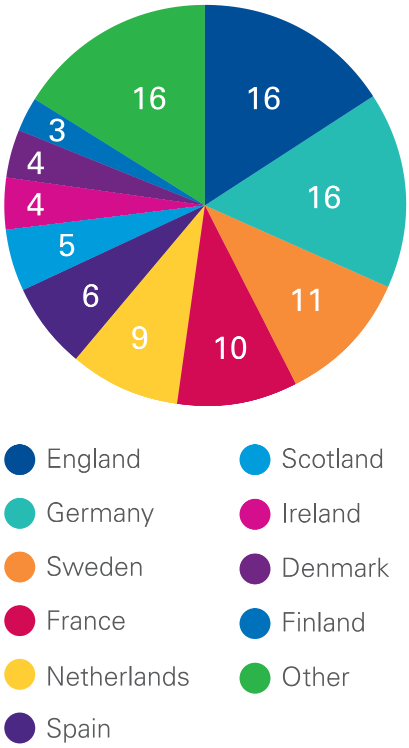
| 39% | 37% | 24% |
|---|---|---|
| **Countries with growth** | **Countries with stability** | **Countries with decline** |

**Source:** Local golf associations with KPMG elaboration.

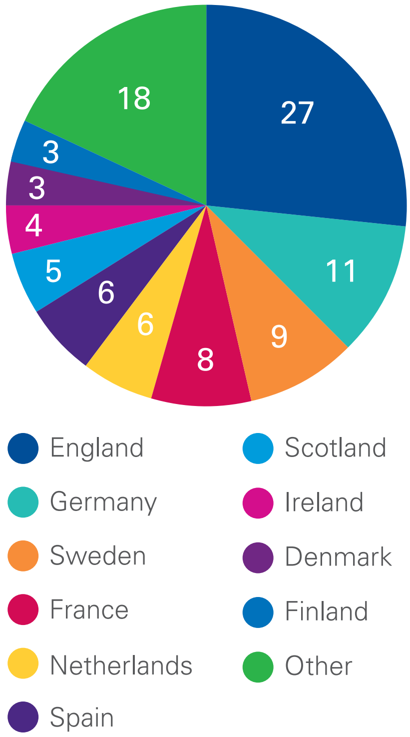
# Europe's Leading Golf Markets in 2017

- In 2017, there were almost 4.2 million golfers and 6,900 standard length golf courses across Europe.
- 84% of all registered golfers and 82% of all golf courses are located in the top ten golf markets.
- The leading golf market in Europe is England with 655,839 registered golfers and 1,872 courses, accounting for 16% and 27% of the European market respectively.
- Top 10 countries from last year's report remained unchanged in 2017 and they are still representing 84% of the European golf market.
- Iceland has the highest participation rate in Europe with 5.0% of total population playing golf.
- Top 10 golf markets have an average participation rate of 2.3% of total population.
- Spain has the lowest participation rate among the top 10 countries in Europe with 0.6% of total population playing golf.

### Registered golfers: Top 10 distribution by country in Europe, 2017 (%)

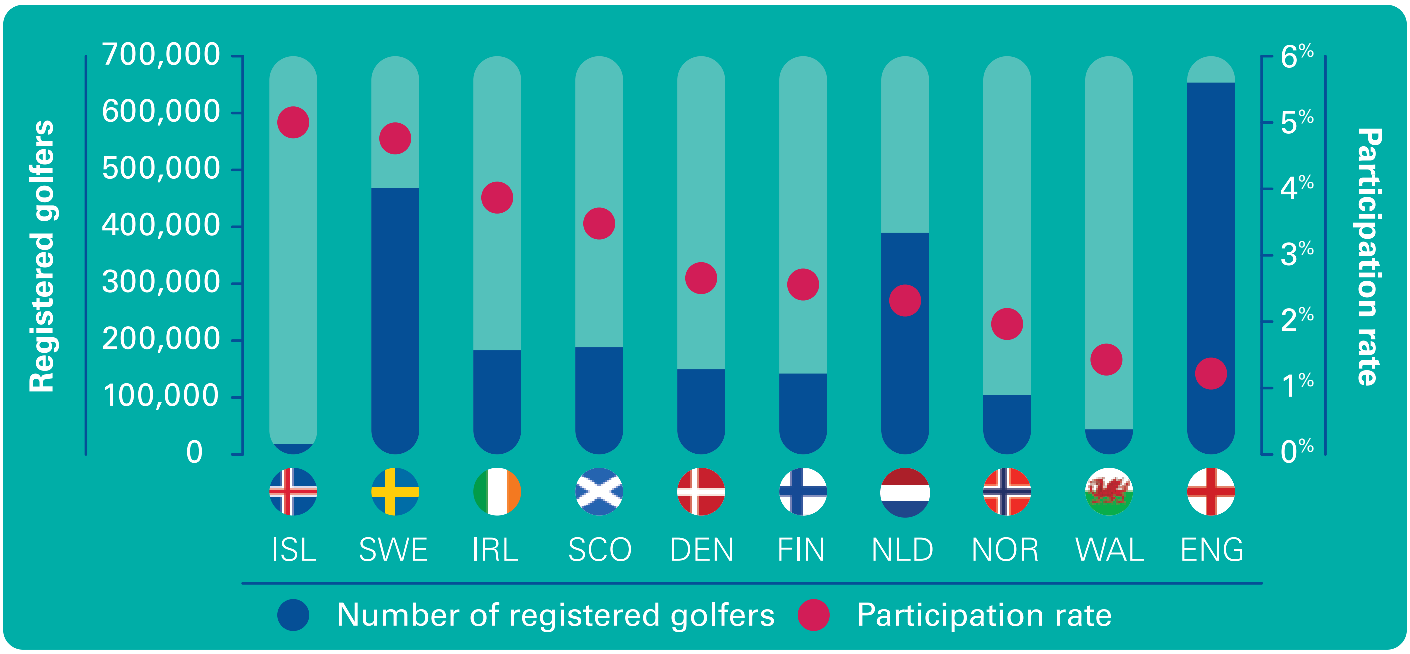



### Golf courses: Top 10 distribution by country in Europe, 2017 (%)




**Source:** Local golf associations with KPMG elaboration.

### Top European markets in terms of participation rate relative to the number of registered golfers, 2017



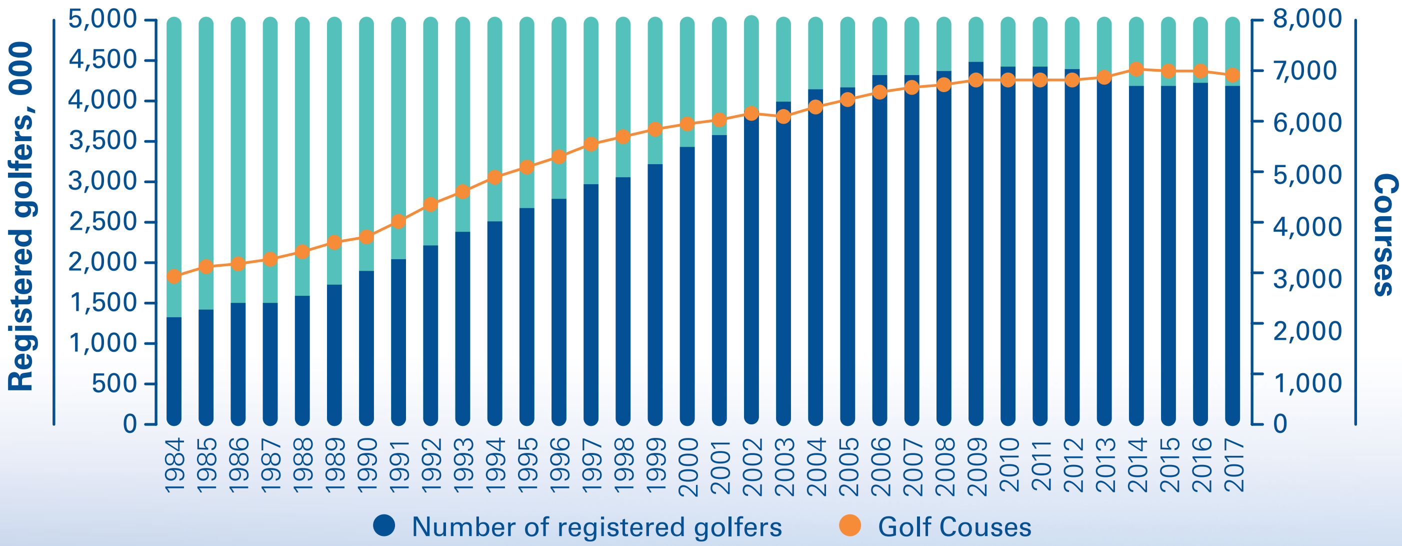

**Source:** Local golf associations with KPMG elaboration. **Note:** We only considered countries with at least 1,000 registered golfers.

# Golf Supply and Demand Trends in Europe

## Supply

- There has been an overall decrease of 71 facilities (-1.0%) compared to 2016.
- England and Scotland recorded the largest decrease in golf facilities in 2017 with 35 (-1.8%) and 18 (-3.1%) closing respectively.
- England remains the leading market in terms of number of courses with almost 1,900.
- Germany and Sweden are the second and third largest markets with 731 and 442 courses respectively.
- Austria and Switzerland each recorded 3.1% increase in the number of golf courses which were the largest gains in Europe.

### Development of golf in Europe, 1984 - 2017




**Sources:** European Golf Association and local golf associations with KPMG elaboration

**Note:** Please note that between 1984 – 2013, data was sourced from the European Golf Association. For the years 2014, 2015, 2016 and 2017, local golf associations reported directly to KPMG. Please see our methodology on page 3 to learn more about our approach to data sourcing.

*Photo by: Aidan Bradley*
*Dom Pedro Pinhal Golf Course, Hole 5 – Vilamoura, Portugal*

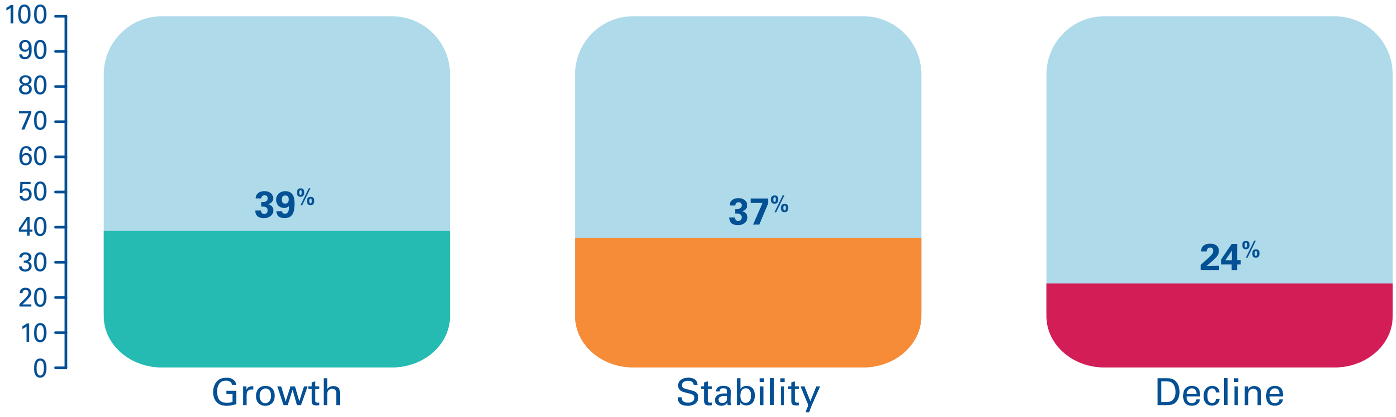
*Photo by: Aidan Bradley*
*Castiglion Del Bosco, Hole 2 – Montalcino, Italy*

## Demand

- The largest declines in registered golfers were seen in England (-38,784), Netherlands (-12,913), Ireland (-7,422) and Scotland (-4,731).
- The leading countries in terms of increasing registered golfers are Czech Republic (5,983), Sweden (4,618) and France (2,452).
- Leading developing countries in terms of percentage growth in registered golfers are emerging Eastern European countries: Lithuania (+37.4%), Romania (+22.3%) and Poland (+20.0%).
- Sweden has a continuous growth in the number of golfers since 2014.
- In 2017, the number of registered golfers in Europe was stable recording a slight decrease by 1.0% (-43,489 golfers).
- Initiatives which have been identified as successful in promoting participation are: increasing junior and female participation (Andorra, Armenia, Austria, Czech Republic, Hungary, Iceland, Italy, Lithuania, Netherlands, Poland, Serbia, Russia, Wales), supporting affordable playing opportunities (Sweden, Turkey) and introducing shorter formats of the game (England).
- The golf federations of France and Italy have noted the positive impacts of hosting the Ryder Cup in 2018 (France) and in 2022 (Italy): focus on 9-hole golf course developments across France and increase family and junior participation in Italy with the *Road to Rome* initiative.

Note: Following the publication of this report on 25th October 2018, the participation numbers for Italy has been amended. This adjustment resulted in a slight reduction to total participation in Europe, and means Italy is no longer amongst the leading growth countries as stated in the version of this report published on 25th October 2018.

### Type of change in participation rates of registered golfers in Europe, 2017 (see methodology)

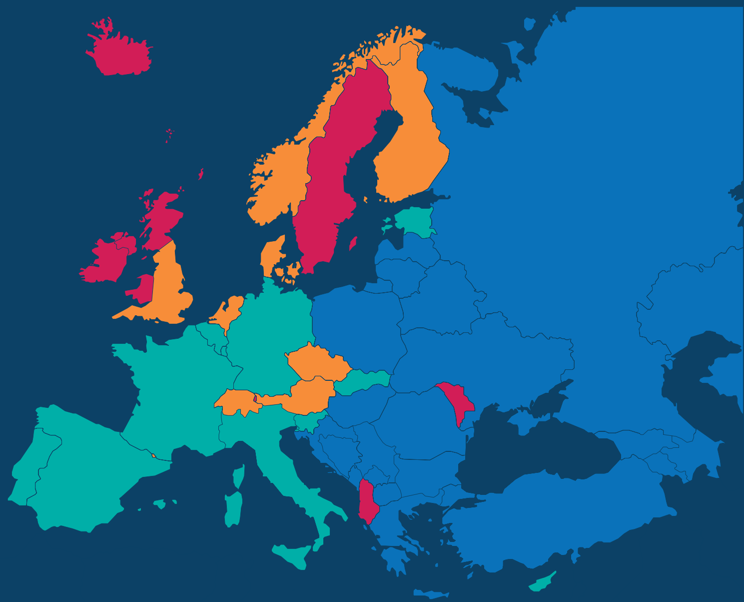



**Source:** Local golf associations with KPMG elaboration.

The following maps show the supply and the demand performance of Europe's Golf Markets:

## Market supply:
## Population per golf course, 2017

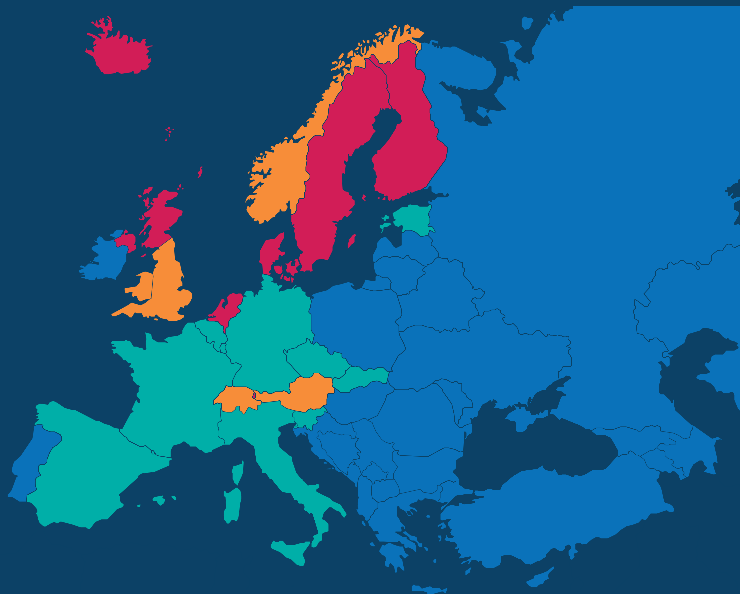
- Market supply is calculated as the ratio of population to the number of golf course per country.
- A mature market tends to have 25,000 players per course.



- Mature  25,000
- Developed 25,000 – 100,000
- Growing 100,000 – 300,000
- Infant  300,000 people

## Market demand:
## Participation rate, 2017

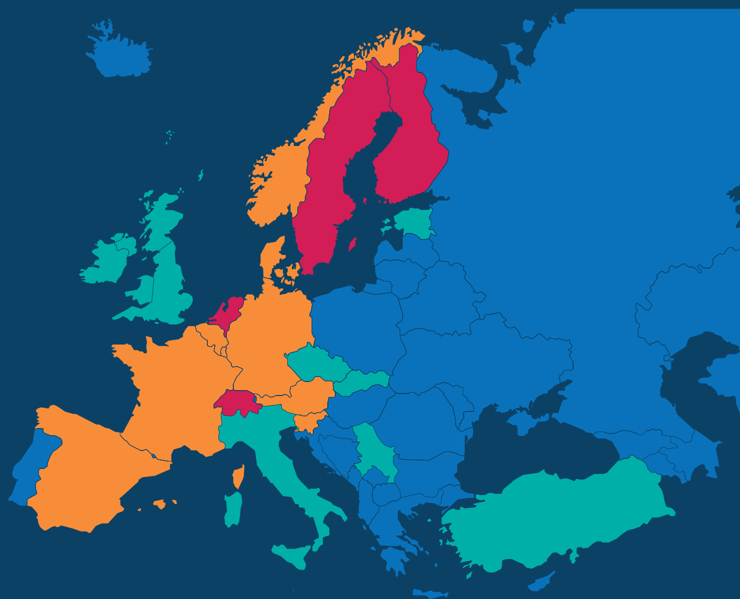
- Each nation's golf participation rate provides an insight into market demand by comparing the size of the population and the proportion of that population which plays golf.



- Mature  ≥ 2%
- Developed 1% - 2%
- Growing 0.2% - 1%
- Infant ≤ 0.2%

## Market supply and demand:
## Golfers per golf course, 2017

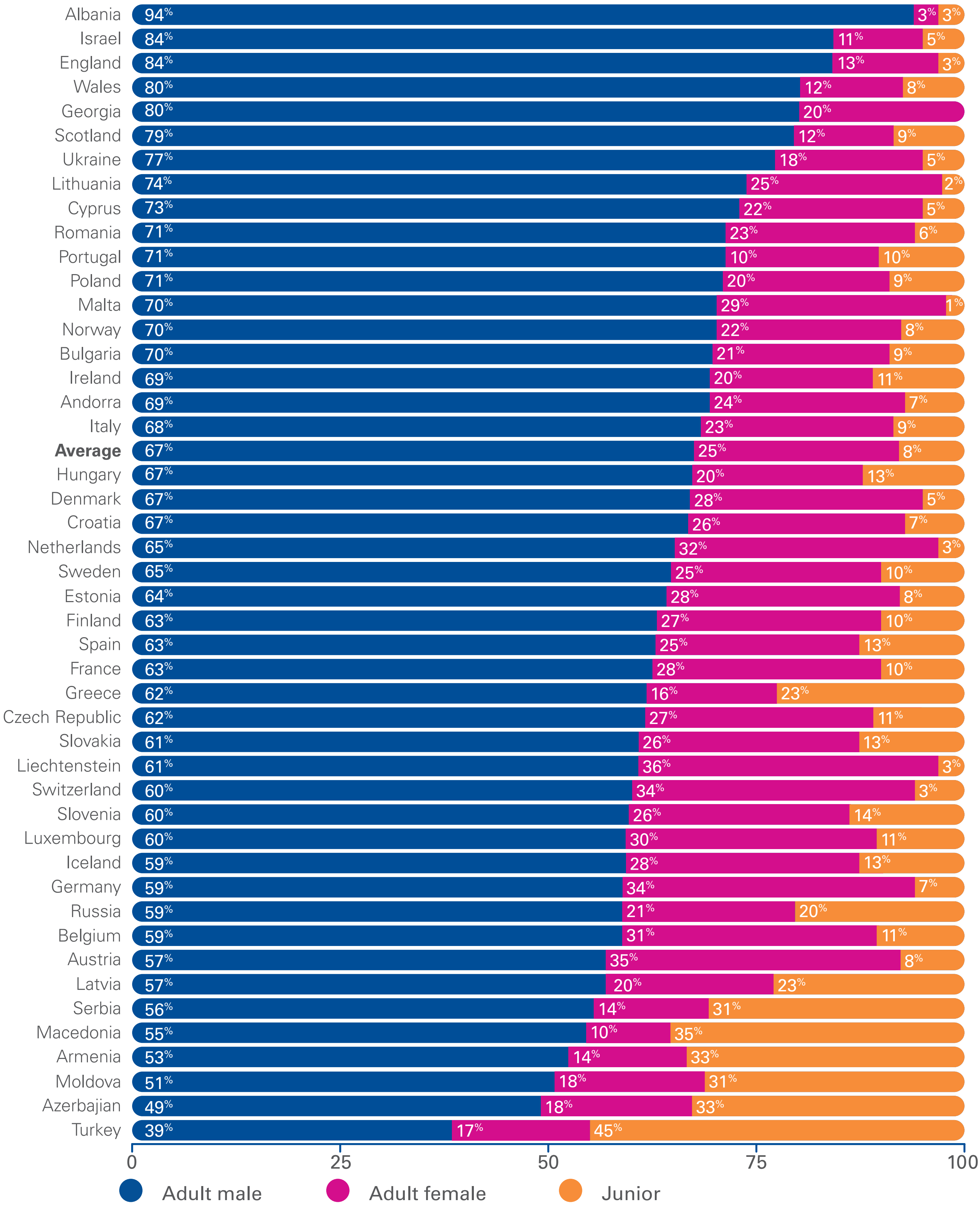
- The market supply and demand is calculated as the ratio of number of registered golfers to the number of golf courses per country.
- The only European countries which have more than 900 golfers per golf course are The Netherlands (1,550), Finland (1,097), Sweden (1,060) and Switzerland (927).



- More than 900 golfers per course
- Between 600 and 900 golfers per course
- Between 300 and 600 golfers per course
- Less than 300 golfers per course

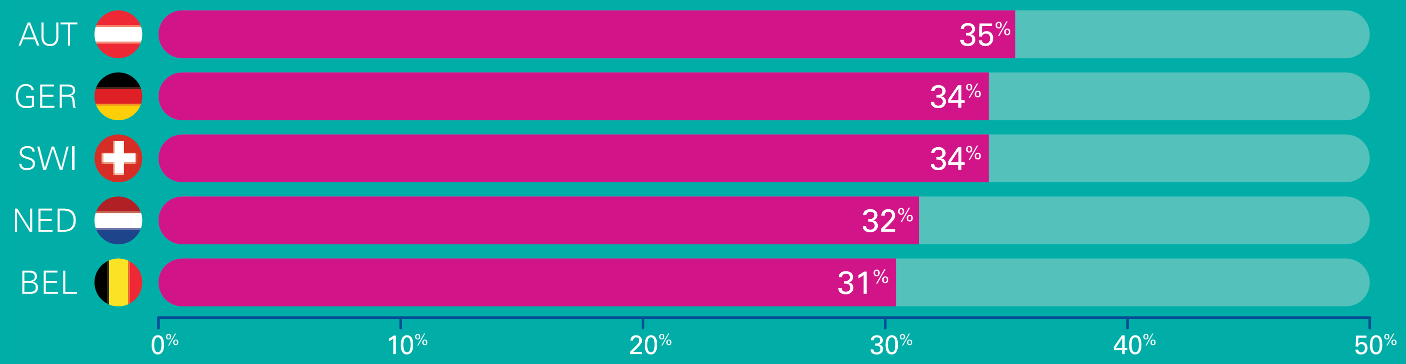
**Source:** Local golf associations, European Golf Association and Economist Intelligence Unit with KPMG elaboration

## Composition of golfers across Europe, 2017



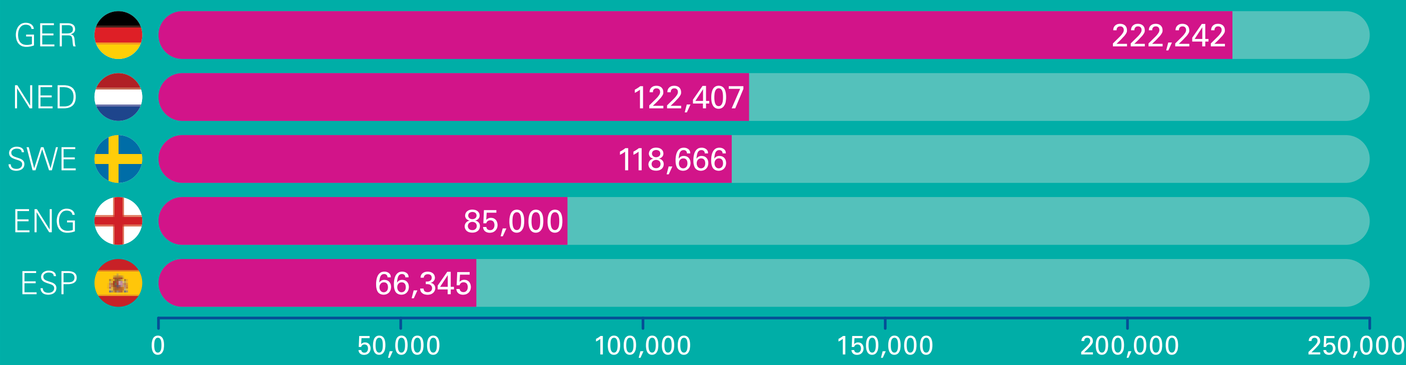

**Source:** European Golf Association and local golf associations with KPMG elaboration

## Top 5 markets in terms of proportion of adult female golfers (compared to all golfers in the country), 2017



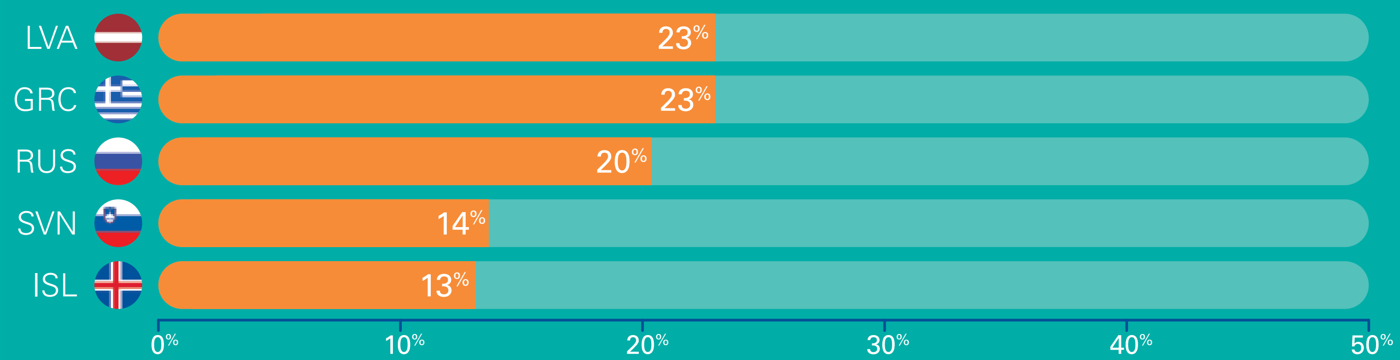

**Source:** Local golf associations with KPMG elaboration **Note:** We considered countries with at least 1,000 registered golfers.

## Top 5 markets in terms of total number of adult female golfers, 2017



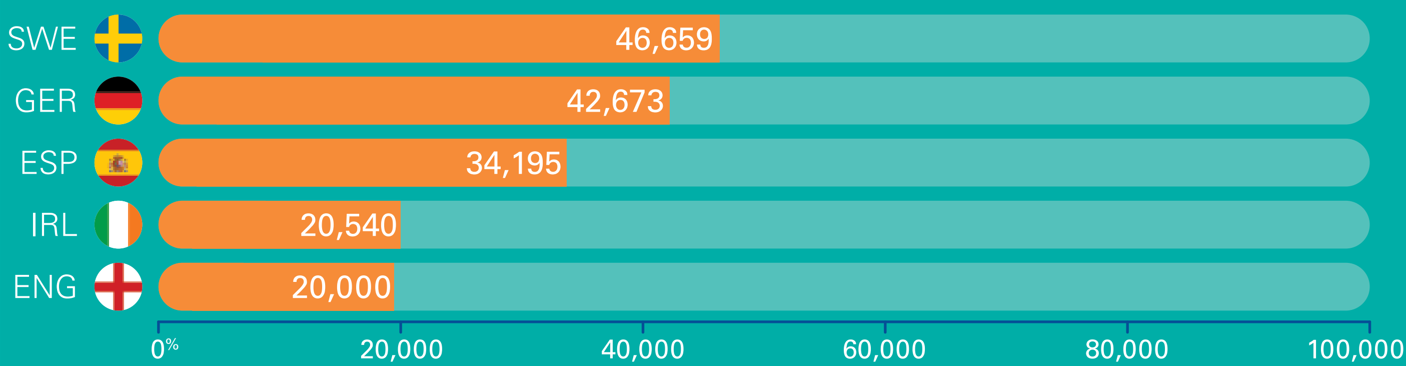

**Source:** Local golf associations with KPMG elaboration

## Top 5 markets in terms of the proportion of junior golfers (compared to all golfers in the country), 2017




**Source:** Local golf associations with KPMG elaboration **Note:** We considered countries with at least 1,000 registered golfers.

## Top 5 markets in terms of total number of junior golfers, 2017




**Source:** Local golf associations with KPMG elaboration

## Professional players and PGA members in Europe

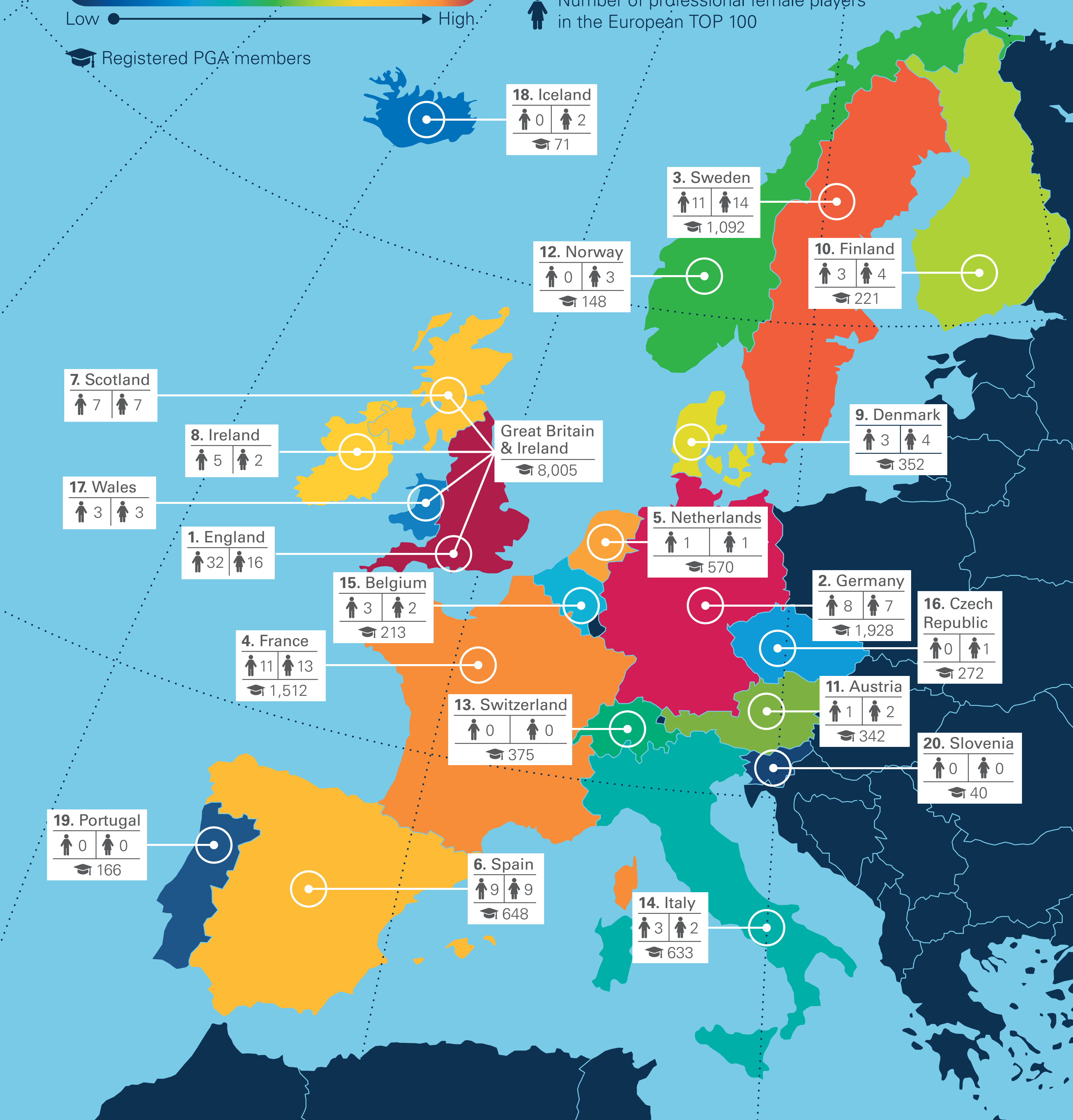
Number of registered golfers ranking - Top 20

Low → High

Number of professional male players in the European TOP 100

Number of professional female players in the European TOP 100

Registered PGA members




Sources: PGA of Europe, Official World Golf Ranking and local associations with KPMG elaboration.

Following the publication of this report on 25th October 2018, the participation numbers for Italy has been amended. This adjustment resulted in changing Italy's ranking in terms of registered golfers from 13th place to 14th place. See Country Statistics on next page.

# KPMG Survey: Country Statics

## Registered golfers and standard golf courses in Europe, 2016-2017

| Country | Registered golfers 2017 | Registered golfers 2016 | % Change 2016 vs. 2017 | Status[3] | Change in the number of golfers 2016 vs. 2017 | Participation rate 2017 | Golf courses 2017 | Golf courses 2016 | % Change 2016 vs. 2017 | Change in the number of golf courses 2016 vs. 2017 | Golfers per golf course 2017 | Population per golf course 2017 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| England | 655,839 | 694,623 | -5.58% | ↓ | -38,784 | 1.19% | 1,872 | 1,907 | -2% | -35 | 350 | 29,524 |
| Germany | 644,943 | 643,158 | 0.28% | = | 1,785 | 0.78% | 731 | 732 | -0% | -1 | 882 | 113,092 |
| Sweden | 468,570 | 463,952 | 1.00% | ↑ | 4,618 | 4.73% | 442 | 444 | -0% | -2 | 1,060 | 22,405 |
| France | 410,171 | 407,719 | 0.60% | = | 2,452 | 0.63% | 602 | 600 | 0% | 2 | 681 | 107,807 |
| Netherlands | 387,597 | 400,510 | -3.22% | ↓ | -12,913 | 2.28% | 250 | 250 | 0% | 0 | 1,550 | 68,080 |
| Spain | 270,464 | 271,865 | -0.52% | = | -1,401 | 0.58% | 349 | 349 | 0% | 0 | 775 | 133,410 |
| Scotland | 187,802 | 192,533 | -2.46% | ↓ | -4,731 | 3.48% | 560 | 578 | -3% | -18 | 335 | 9,650 |
| Ireland | 183,461 | 190,883 | -3.89% | ↓ | -7,422 | 3.84% | 405 | 410 | -1% | -5 | 453 | 11,785 |
| Denmark | 151,243 | 151,139 | 0.07% | = | 104 | 2.64% | 190 | 190 | 0% | 0 | 796 | 30,163 |
| Finland | 142,672 | 143,025 | -0.25% | = | -353 | 2.60% | 130 | 129 | 1% | 1 | 1,097 | 42,269 |
| Austria | 102,695 | 100,351 | 2.34% | ↑ | 2,344 | 1.18% | 165 | 160 | 3% | 5 | 622 | 52,969 |
| Norway[2] | 100,702 | 100,702 | 0.00% | = | 0 | 1.92% | 152 | 152 | 0% | 0 | 663 | 34,428 |
| Switzerland | 91,785 | 90,725 | 1.17% | ↑ | 1,060 | 1.09% | 99 | 96 | 3% | 3 | 927 | 85,027 |
| Italy | 90,173 | 90,259 | -0.10% | = | -86 | 0.15% | 242 | 241 | 0% | 1 | 373 | 247,107 |
| Belgium | 64,965 | 62,632 | 3.72% | ↑ | 2,333 | 0.58% | 77 | 76 | 1% | 1 | 844 | 146,336 |
| Czech Republic | 60,301 | 54,318 | 11.01% | ↑ | 5,983 | 0.57% | 106 | 106 | 0% | 0 | 569 | 99,057 |
| Wales | 44,551 | 45,422 | -1.92% | ↓ | -871 | 1.44% | 145 | 149 | -3% | -4 | 307 | 21,379 |
| Iceland | 17,024 | 16,823 | 1.19% | ↑ | 201 | 5.03% | 63 | 61 | 3% | 2 | 270 | 5,371 |
| Portugal | 15,847 | 14,659 | 8.10% | ↑ | 1,188 | 0.15% | 79 | 87 | -9% | -8 | 201 | 130,506 |
| Slovenia[2] | 8,762 | 8,762 | 0.00% | = | 0 | 0.42% | 13 | 13 | 0% | 0 | 674 | 158,846 |
| Slovakia | 8,689 | 8,761 | -0.82% | = | -72 | 0.16% | 26 | 29 | -10% | -3 | 334 | 209,052 |
| Turkey | 6,776 | 7,083 | -4.33% | ↓ | -307 | 0.01% | 18 | 18 | 0% | 0 | 376 | 4,434,160 |
| Poland | 5,646 | 4,705 | 20.00% | ↑ | 941 | 0.01% | 33 | 37 | -11% | -4 | 171 | 1,160,606 |
| Luxembourg[2] | 3,487 | 3,475 | 0.35% | = | 12 | 0.62% | 5 | 5 | 0% | 0 | 697 | 112,600 |
| Estonia | 2,843 | 2,889 | -1.59% | ↓ | -46 | 0.22% | 8 | 10 | -20% | -2 | 355 | 164,500 |
| Russia | 2,104 | 1,947 | 8.06% | ↑ | 157 | 0.00% | 24 | 26 | -8% | -2 | 88 | 6,116,667 |
| Cyprus | 1,399 | 1,402 | -0.21% | = | -3 | 0.12% | 9 | 9 | 0% | 0 | 155 | 130,000 |
| Croatia[2] | 1,380 | 1,380 | 0.00% | = | 0 | 0.03% | 5 | 5 | 0% | 0 | 276 | 834,200 |
| Hungary | 1,279 | 1,095 | 16.80% | ↑ | 184 | 0.01% | 13 | 14 | -7% | -1 | 98 | 767,846 |
| Lithuania | 1,101 | 801 | 37.45% | ↑ | 300 | 0.04% | 7 | 5 | 40% | 2 | 157 | 411,555 |
| Greece[2] | 1,038 | 1,514 | -31.44% | ↓ | -476 | 0.01% | 8 | 8 | 0% | 0 | 130 | 1,348,750 |
| Latvia[2] | 1,004 | 1,004 | 0.00% | = | 0 | 0.05% | 4 | 6 | -33% | -2 | 251 | 490,000 |
| Israel | 950 | 850 | 11.76% | ↑ | 100 | 0.01% | 1 | 1 | 0% | 0 | 950 | 8,421,430 |
| Bulgaria | 912 | 920 | -0.87% | = | -8 | 0.01% | 6 | 7 | -14% | -1 | 152 | 1,197,000 |
| Liechtenstein | 864 | 809 | 6.80% | ↑ | 55 | 2.29% | 0 | 0 | 0% | 0 | - | - |
| Serbia | 720 | 747 | -3.61% | ↓ | -27 | 0.01% | 2 | 2 | 0% | 0 | 360 | 4,381,014 |
| Romania | 697 | 570 | 22.28% | ↑ | 127 | 0.00%[1] | 7 | 6 | 17% | 1 | 100 | 2,801,118 |
| Malta[2] | 555 | 546 | 1.65% | ↑ | 9 | 0.13% | 1 | 1 | 0% | 0 | 555 | 432,089 |
| Ukraine[2] | 516 | 593 | -12.98% | ↓ | -77 | 0.00%[1] | 4 | 4 | 0% | 0 | 129 | 11,002,304 |
| Andorra | 221 | 79 | 179.75% | ↑ | 142 | 0.29% | 2 | 2 | 0% | 0 | 111 | 38,477 |
| Moldova | 185 | 182 | 1.65% | ↑ | 3 | 0.00%[1] | 0 | 1 | -100% | -1 | - | - |
| Armenia | 120 | 130 | -7.69% | ↓ | -10 | 0.00%[1] | 1 | 1 | 0% | 0 | 120 | 3,000,000 |
| Macedonia[2] | 119 | 119 | 0.00% | = | 0 | 0.01% | 1 | 1 | 0% | 0 | 119 | 2,078,000 |
| Azerbajian[2] | 104 | 104 | 0.00% | = | 0 | 0.00%[1] | 2 | 2 | 0% | 0 | 52 | 4,850,000 |
| Albania[2] | 64 | 64 | 0.00% | = | 0 | 0.00%[1] | 1 | 1 | 0% | 0 | 64 | 2,934,363 |
| Georgia[2] | 50 | 50 | 0.00% | = | 0 | 0.00%[1] | 1 | 1 | 0% | 0 | 50 | 3,718,200 |
| **Total** | **4,142,390** | **4,185,879** | **-0.83%** | = | **-34,925** | **0.86%** | **6,861** | **6,932** | **-1.02%** | **-71** | | |

1 The participation rate is below 0.01%.
2 Data provided by the European Golf Association.
3 Status represents the level of change in registered golfers:
↑ indicates growth ↓ indicates a decline = indicates stability (±1% change).

Sources: Local golf associations and Economist Intelligence Unit with KPMG elaboration

Note: Statistics were not provided by the local golf associations in Belarus, Bosnia & Herzegovina, Kosovo, Montenegro and San Marino.

Following the publication of this report on 25th October 2018, the participation numbers for Italy has been amended. This adjustment resulted in a slight reduction to total participation in Europe.

# KPMG Golf Advisory Practice in EMEA

## Who we are?

KPMG's Golf Advisory Practice has in-depth know-how and experience of the business side of the golf industry.

Our experience across the golf resort industry is diverse and includes services to both existing and developing integrated golf resorts. We have a clear understanding of the impact that a golf course can bring to a resort or a residential community development.

Helping to maximize developers' returns through the integration of golf, real estate and hospitality functions is one of our primary areas of focus.

In addition to the wide range of professional services we offer, our Practice is also involved in several other golf-related initiatives. We regularly produce high profile thought leadership content for the industry, including the *Golf Benchmark Survey*, one of the largest golf research projects in the world. As a result, we have accrued invaluable comparable data and information from the sector. The beneficiaries of such deep industry knowledge are our clients.

## What can we do for you?

KPMG's Golf Advisory Practice involvement in the golf and golf tourism industry sector includes the following services:

- **Market and financial feasibility study** – assessing project sites, locations and markets in order to provide comprehensive financial analysis to assess potential investment returns.
- **Project conceptualization and investment planning** – developing realistic and implementable concepts with short, medium and long-term investment planning.
- **Business plan** – advising on the strategic direction for the realisation and delivery of project concepts from staffing to marketing and sales.
- **Project management** – managing and coordinating the project from inception through planning, up until the start of construction.
- **Valuation service** – preparing asset and business valuations
- **Transaction service** – assisting in the sale of greenfield projects that are in the development phase as well as existing golf courses and resorts through the preparation of investment memoranda and the selection of potential buyers.
- **Operational review** – assessing existing facilities and market in order to provide strategies for profit enhancement.
- **Supplier selection** – assisting with the identification and selection of golf management companies, golf course architects and master planners.
- **Other advisory services** – economic impact assessment of large events and developments, strategic advisory to government bodies and regulators.

# Contact us

For further information about KPMG services, please contact:

**Andrea Sartori**
**Partner**
**KPMG Global Head of Sports**
**E:** andreasartori@kpmg.com

**Neil Coulson**
**Senior Manager**
**Golf Advisory Practice**
**E:** ncoulson@kpmg.com

**KPMG Golf Advisory Practice in EMEA**
**E:** info@golfbenchmark.com

Váci út 31
1134 Budapest
Hungary

Please note that all Golf Benchmark reports can be downloaded free of charge at **golfbenchmark.com**