

Golf Business 2016 Conference Europe

*"THE BIG
OPPORTUNITY"*



Golf in Europe

Total number of registered golfers in Europe, 2015

4,142,661

State of participation of registered golfers in Europe, 2015

Change since 2014

-0.3%

Status

Stable

-12,202 golfers since 2014

Proportion of European population who actively played golf in 2015

0.9%

-0.1% since 2014

Total number of standard golf courses in Europe, 2015

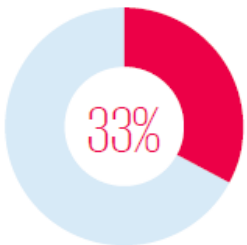
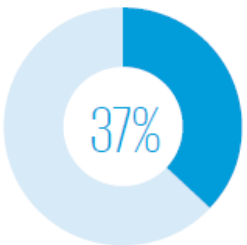
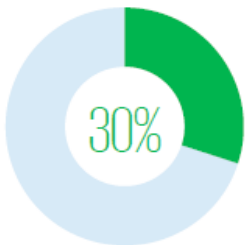
7,097

+18 golf courses since 2014

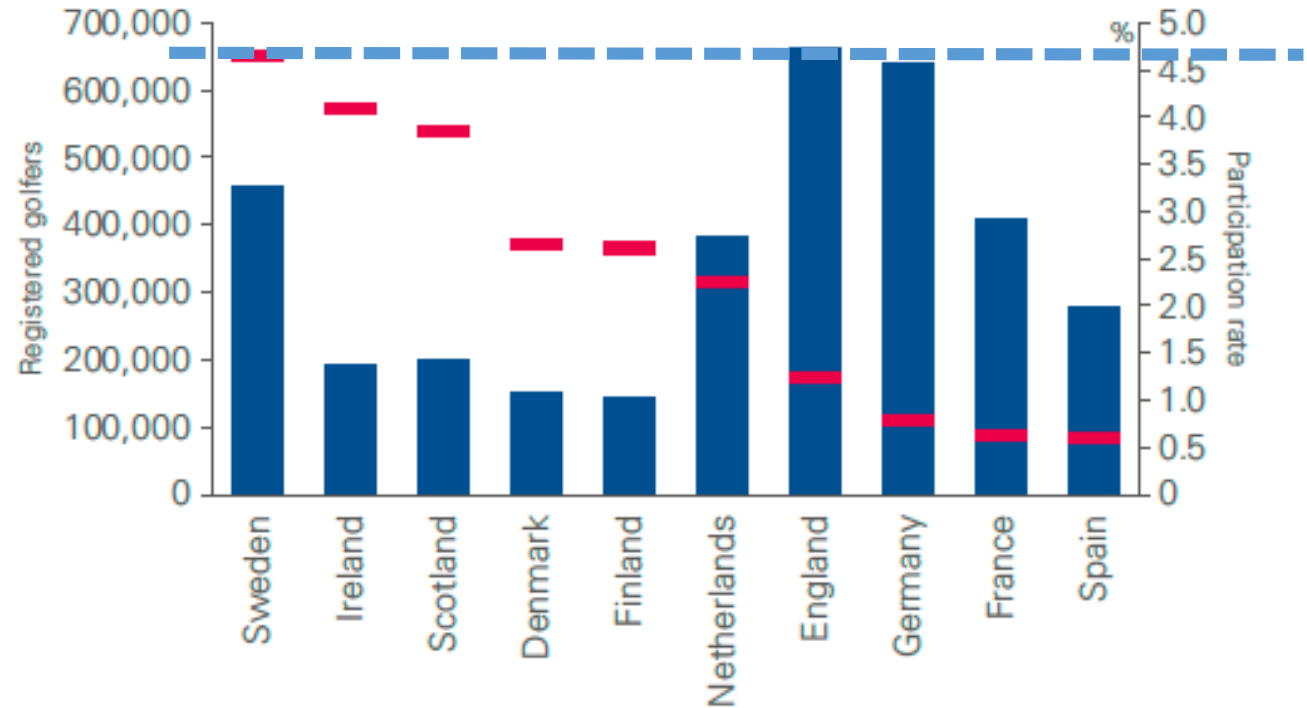


Type of change in participation rates of registered golfers in Europe, 2015 (see methodology)

Countries with growth Countries with stability Countries with decline



Golf participation rate in the top 10 European markets relative to the number of registered golfers, 2015



- Number of registered golfers
- Participation rate

Golf in Europe



Registered golfers and standard golf courses in Europe, 2014-2015

Country	Registered golfers 2015 ¹	Registered golfers 2014 ¹	Change 2014 vs. 2015	Status ²	Change in the number of golfers 2014 vs. 2015	Participation rate 2015	Golf courses 2015 ³	Golf courses 2014 ³	Change 2014 vs. 2015	Change in the number of golf courses 2014 vs. 2015	Golfers per golf course 2015	Population per golf course 2015
England	661,806	678,372	-2.4%	↓	-16,667	1.2%	1,923	1,929	-0.3%	-6	344	28,029
Germany	640,181	639,137	0.2%	=	1,044	0.8%	727	728	-0.1%	-1	881	112,617
Sweden	466,770	436,812	4.8%	↑	19,958	4.7%	445	447	-0.4%	-2	1,024	22,022
France	407,669	408,368	-0.2%	=	-819	0.6%	699	697	0.3%	2	680	106,013
Netherlands	382,232	382,236	0.0%	=	-3	2.3%	239	231	3.5%	8	1,699	71,130
Spain	277,782	283,991	-2.2%	↓	-8,209	0.6%	430	429	0.2%	1	646	107,209
Scotland	199,244 ⁴	200,384 ⁴	-0.6%	=	-1,120	3.8%	697	697	0.0%	0	334	8,710
Ireland	192,607	197,844	-2.7%	↓	-6,337	4.1%	418	423	-1.2%	-5	461	11,244
Denmark	160,916	160,899	0.1%	=	217	2.7%	190	188	1.1%	2	794	30,000
Finland	143,182	142,778	0.3%	=	404	2.8%	166	166	0.6%	1	918	36,266
Austria	101,480	103,226	-1.7%	↓	-1,746	1.2%	167	168	0.6%	1	648	64,777
Norway	101,349	102,014	-0.7%	=	-665	2.0%	162	166	-1.9%	-3	667	33,663
Italy	90,027	91,713	-1.8%	↓	-1,686	0.2%	238	236	1.3%	3	378	261,261
Switzerland	89,679	88,623	1.2%	↑	1,056	1.1%	96	96	0.0%	0	933	66,417
Czech Republic	83,401	83,338	0.1%	=	63	0.6%	104	102	2.0%	2	610	101,923
Belgium	62,606	61,206	2.3%	↑	1,401	0.6%	77	77	0.0%	0	613	148,062
Wales	48,980	49,330	-4.8%	↓	-2,350	1.6%	182	184	-1.1%	-2	268	17,033
Iceland	18,437	18,371	0.4%	=	66	6.0%	63	65	-3.1%	-2	281	6,238
Portugal	13,848	14,094	-1.8%	↓	-246	0.1%	87	86	1.2%	1	169	120,690
Slovakia	8,461	8,464	0.1%	=	7	0.2%	28	24	16.7%	4	302	192,867
Turkey	6,829 ⁷	6,776 ⁸	0.8%	=	53	0.0%	19	18	6.6%	1	369	4,088,421
Slovenia	6,891	6,129	-3.9%	↓	-238	0.3%	13	12	8.3%	1	463	161,636
Poland	4,016	3,739	7.4%	↑	276	0.0%	37	36	2.8%	1	109	1,037,838
Luxembourg	3,308 ⁷	3,667 ⁸	-7.0%	↓	-249	0.6%	6	6	-16.7%	-1	662	110,000
Estonia	2,810	2,492	12.8%	↑	318	0.2%	10	8	25.0%	2	281	130,000
Greece	1,830	2,360	-22.1%	↓	-520	0.0%	8	8	0.0%	0	229	1,387,600
Russia	1,667	1,366	22.1%	↑	302	0.0% ³	29	28	3.6%	1	67	4,948,276

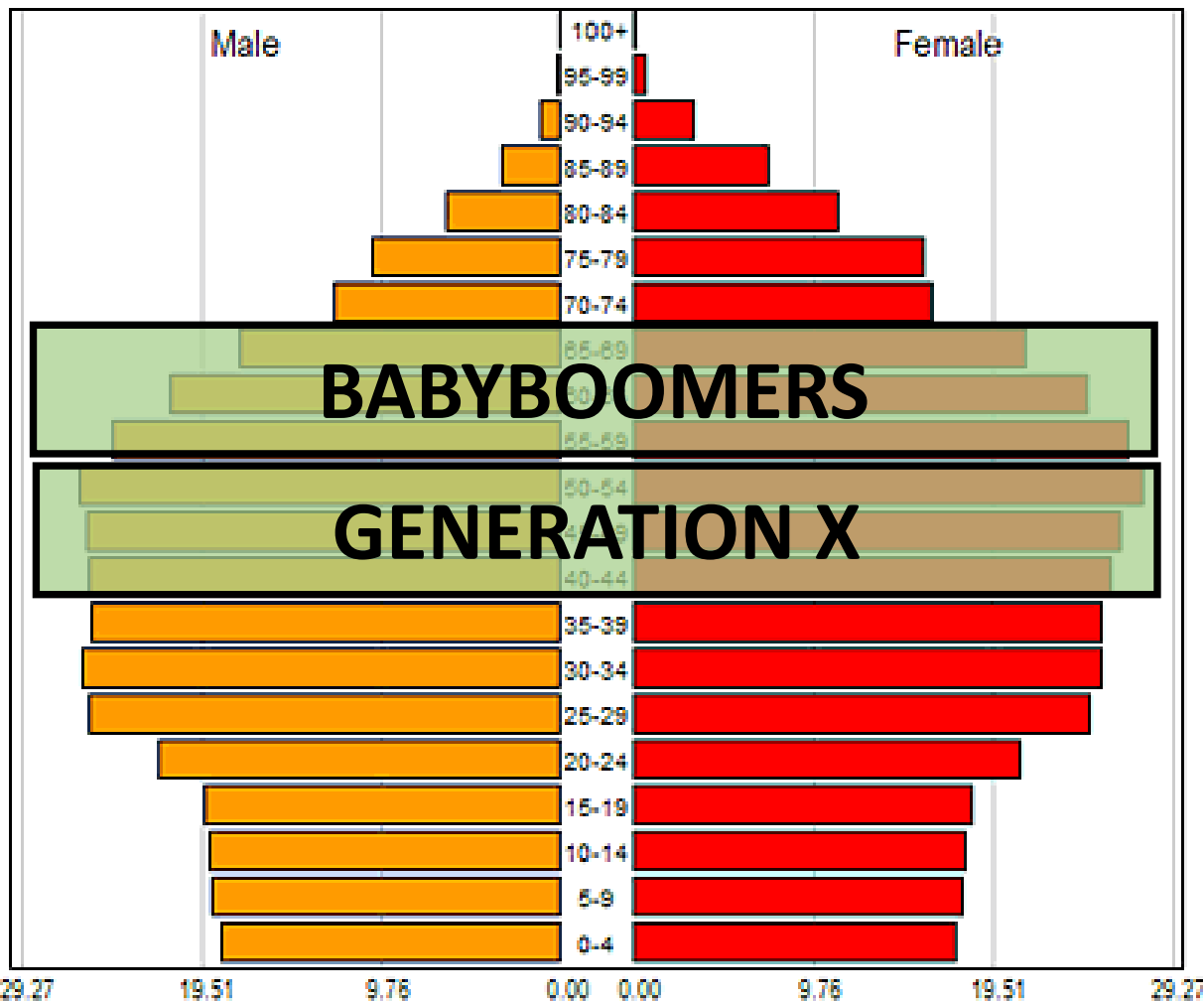
Golf in Europe



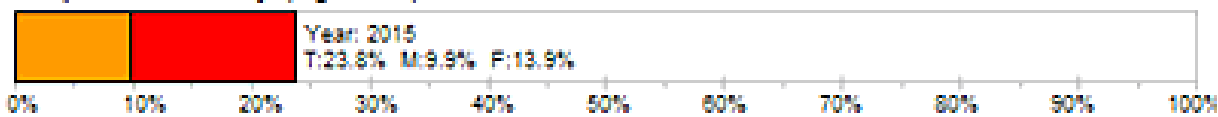
Registered golfers and standard golf courses in Europe, 2014 vs. 2015

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England	681,806	678,372	-2.4%	↓	-16,587	
Germany	848,181	888,187	0.2%	=	1,044	
Sweden	456,770	436,812	4.6%	↑	19,958	
France	487,588	488,888	-0.2%	=	-819	
Netherlands	382,232	382,236	0.0%	=	-3	
Spain	277,782	283,991	-2.2%	↓	-6,209	
Scotland	188,244 ⁵	200,364 ⁴	-0.6%	=	-1,120	
Ireland	182,607	187,844	-2.7%	↓	-5,337	

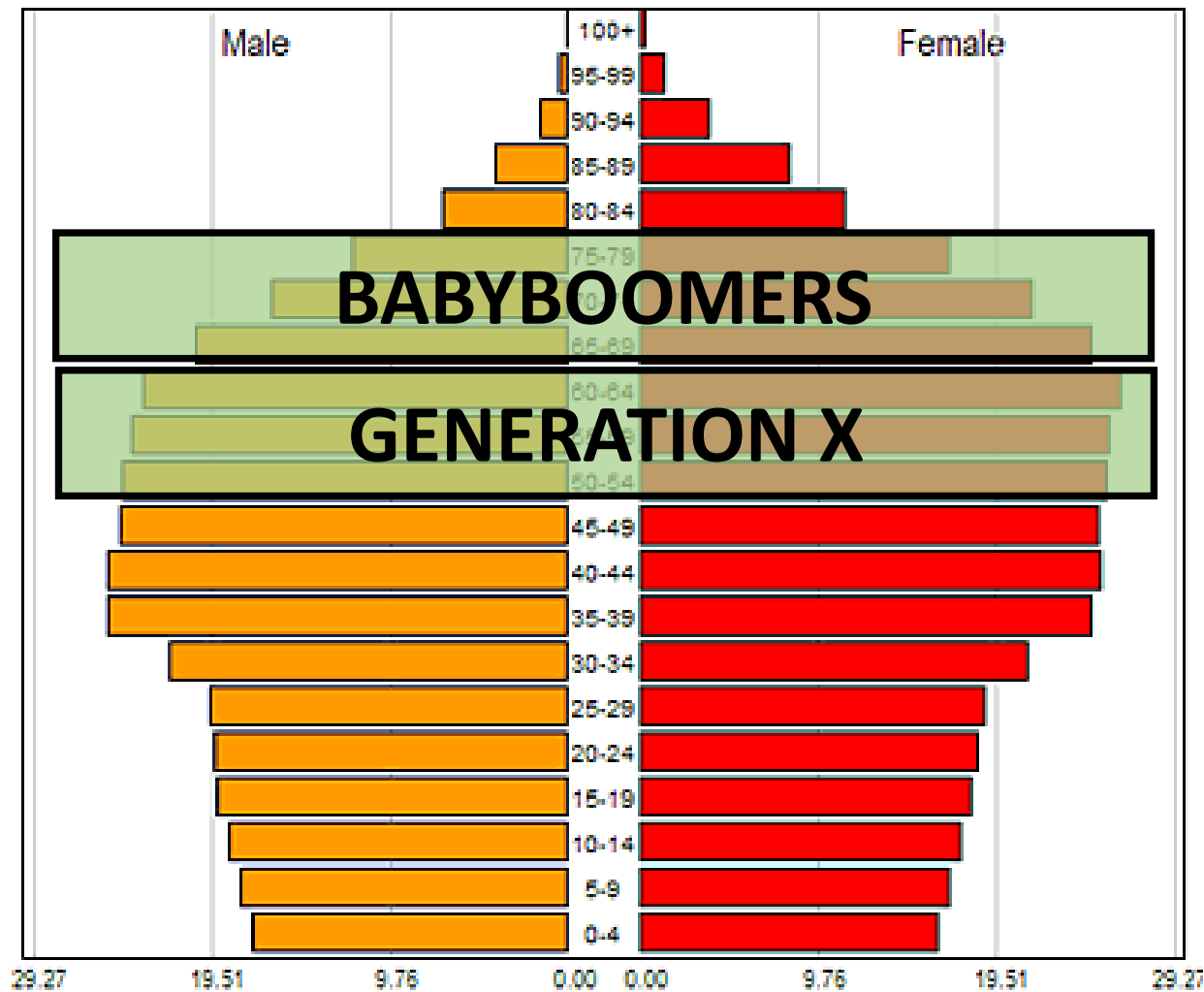
EUROPE: 2015



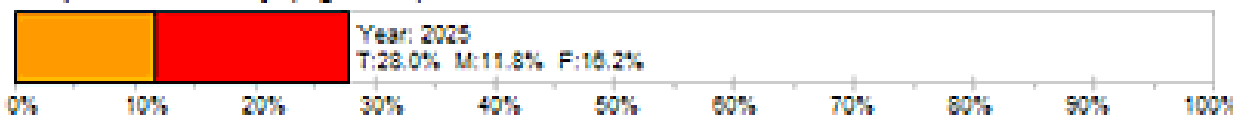
Proportion: Elderly (Age 60+)



EUROPE: 2025



Proportion: Elderly (Age 60+)



“Retention is
the single most
important thing
for growth.”

ALEX SCHULZ, VP GROWTH, FACEBOOK.COM

