



Golf Around the World.

2021

Fourth Edition



Golf Around the World

Fourth Edition



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Front cover image: St Patrick's Links Golf Club, County Donegal, Ireland. (Credit: Clyde Johnson)
 Above: The Pit, Mexico City, Mexico. (Credit: Agustin Piza)



About this report.

Golf Around The World 2021 explores golf's global reach as seen through the supply of golf courses, both existing and under development. It provides an account of current conditions and a preview of the near future. This fourth edition presents a more focused census on innovative, new projects and major renovations than previous biennial editions dating back to 2015. This edition also places golf course supply and development trends within a larger context of geography, economic development and environmental management. A number of projects profiled here are modestly-budgeted undertakings that are representative of the wide range of golf development underway. In paying close attention to the six regions in which the world's golf map has been divided, we also seek out trends within those regions, such as the emergence of Morocco as a major market and the use of golf courses as a driver of local participation in countries such as Guyana, Mexico and Pakistan.

The report is also written as the world comes to terms with the Covid-19 pandemic, which has seriously affected play as well as the development of projects in various stages of design and construction. Throughout the worldwide pandemic, golf has shown itself to be a safe activity that can be enjoyed with family and friends outdoors and provide valuable health benefits.

This report and the research behind it have been funded by The R&A along with many of the world's leading companies. Collectively they have supported and helped disseminate the work of the National Golf Foundation (NGF), a US-based golf business association that has developed and maintains a complete inventory of golf facilities in the world.

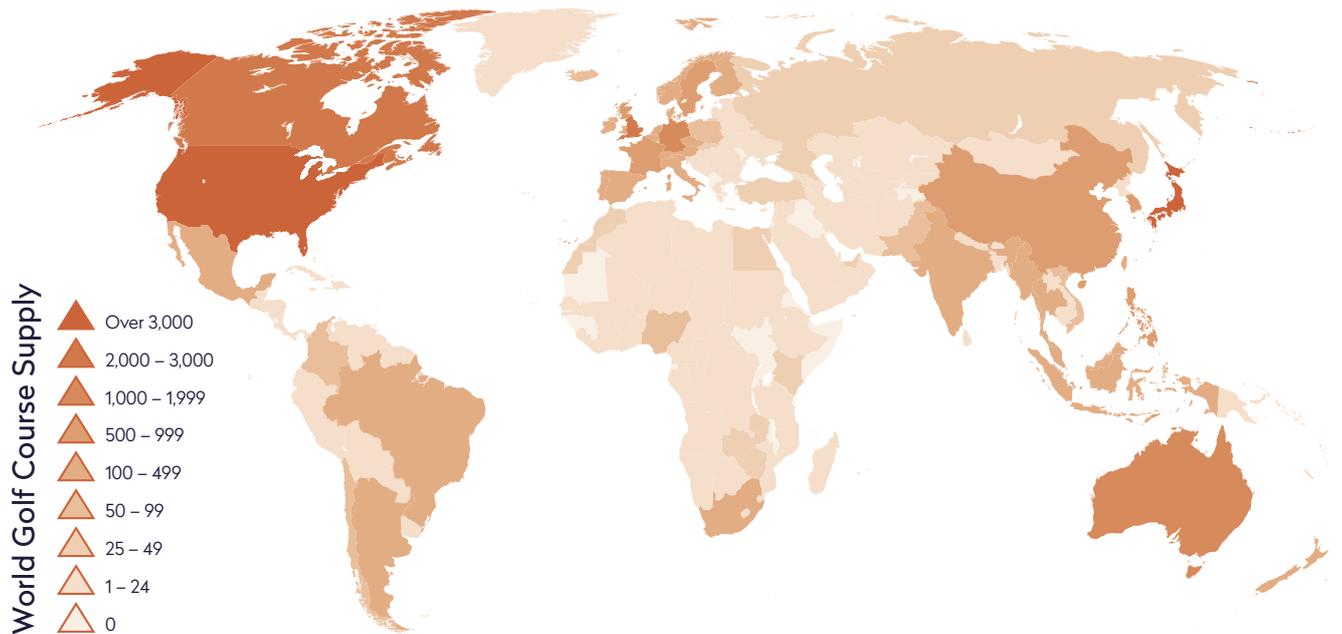
The R&A would like, in turn, to thank the NGF for the research that has made the report possible; Bradley S Klein, a distinguished US author and journalist who developed the narrative for this report.

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Research: National Golf Foundation, Jupiter, FL USA. Narrative: Bradley S Klein, Bloomfield, CT USA.



Global golf supply.



Golf is truly a global sport. As of year-end 2020, there were 38,081 golf courses, spread among 206 of the world's 251 countries. That is an 82% diffusion rate of the sport globally. Still, golf is geographically concentrated, with 80% of the world's supply of courses located in the top 10 golfing countries, including the United States of America, Japan, United Kingdom (inclusive of England, Northern Ireland, Scotland and Wales), Canada, Australia, Germany, France, Republic of Korea, Sweden and China.

Antarctica lost its only golf course last year, but 96 countries are seeing golf development. Montenegro will soon join the ranks of golfing countries with the opening of the Gary Player-designed Lustica Bay project. The Balkan country will join 48 other countries with only one golf course, half of which have only nine holes. One of those with only nine holes, Guyana, on South America's northern coast, is taking a massive leap through the development of an 18-hole layout at Maraiko Bay as part of an ambitious residential and commercial undertaking.

The majority of worldwide golf course supply remains located in the western hemisphere. North America is home to 50% of world supply; the USA alone has 42% of the world's total. Both figures represent marginal downshifts, as the relative balance of golf power moves overseas. Europe has the second largest regional share with 23% of the world's total, followed by Asia with 17%, Oceania with 5% and both Africa and South America with 2%.

Though golf has traditionally been associated with private clubs where play is essentially restricted to members, it is in fact overwhelmingly played at public facilities worldwide with 80% of courses open to the public in some form or another on a 'pay-per-play' basis.

Of course, the lingering influence of its English-speaking golf traditions is hard to disavow. Statistically,

Top 20 golfing countries (by no. of courses)

Country	Courses	Holes	Facilities
United States of America	16,156	240,369	14,139
Japan	3,140	45,165	2,202
United Kingdom	3,101	46,278	2,660
Canada	2,564	35,586	2,200
Australia	1,584	23,070	1,501
Germany	1,054	14,175	737
France	811	11,058	645
Korea, Republic Of	810	9,348	447
Sweden	650	9,150	463
China	617	9,054	402
Spain	493	7,026	408
South Africa	477	6,192	460
New Zealand	416	5,769	399
Ireland	365	5,598	322
Netherlands	350	4,104	241
Argentina	348	4,386	315
Denmark	347	4,464	194
Thailand	317	4,029	235
Italy	312	4,122	264
India	298	3,744	282

the most golf-centric country in terms of geographic saturation is England, whose 2,213 courses on 50,346 square miles of landmass equates to one every 22.8 square miles. Next in line is Wales (184 courses/8,006 square miles) with one course every 43.5 square miles.

Northern Ireland (113 courses/5,456 square miles) has one course every 48.3 square miles and Scotland (594 courses/30,081 square miles) has one per 50.6 square miles. Australia, 5th in line overall with 1,584 courses, has them spread out over a vast area of 2,970,000 square miles, most of which is uninhabited, resulting in a density of only one course per 1,875 square miles. Even with all its 16,156 golf courses, the vastness of the USA (3,797,000 square miles) reduces its golf density to one every 235 square miles

The one glaring outlier to English-language golf saturation density is Japan, whose world number two status in the supply chain of golf courses (3,140) is condensed into a cumulative land mass of only 145,914 square miles, leading to one golf course every 46.5 miles.

There are
206

countries in which
golf is played

The top 20 countries
account for

90%

of global supply

Global golf score card

Land area	147,553,000 km ² / 56,970,00miles ²
Countries/Territories	251
Golfing countries/territories	206
Golf courses	38,081
Golf holes	544,866
Golf facilities	31,773
Courses under development	540
Private courses	7,717
Public courses	30,364
Population	7,794,798,729
Population per golf hole	14,306

Golf courses compared to population

Region	Population	Golf holes	Golf courses	Population per hole
Africa	1,340,598,113	12,207	930	109,822
Asia & the Middle East	4,640,251,290	87,072	6,323	54,659
Europe	748,900,178	124,290	8,888	6,025
North America (incl. Caribbean & Central Am)	592,015,432	282,372	19,160	2,097
Oceania	42,273,644	29,784	2,077	1,419
South America	430,759,772	9,141	703	47,124
The World	7,794,798,729	544,866	38,081	14,306

Golf courses compared to land area

Continent	Area	% of total land area on earth	Golf courses	% of world golf
Africa	30,065,000 km ² /11,608,000 miles ²	20%	930	2%
Antarctica*	13,209,000 km ² /5,100,000 miles ²	9%	-	0%
Asia & the Middle East	28,201,258 km ² /10,888,518 miles ²	20%	6,323	17%
Europe	26,315,742 km ² /10,160,482 miles ²	18%	8,888	23%
North America (incl. Caribbean & Central Am)	24,256,000 km ² /9,365,000 miles ²	16%	19,160	50%
Oceania*	7,687,000 km ² /2,968,000 miles ²	5%	2,077	5%
South America	17,819,000 km ² /6,880,000 miles ²	12%	703	2%
The World	147,553,000 km²/56,970,000 miles²	100%	38,081	100%

* Antarctica is considered part of Oceania – shown separately due to the quantity of land mass.

Worldwide development of the sport.



New golf courses under development

Region	In planning	Under construction	Total courses under development	% new development	Countries with new golf development
Africa	28	15	43	9%	15
Asia & the Middle East	102	51	153	28%	25
Europe	87	43	130	24%	26
North America (incl. Caribbean & Central Am)	104	71	175	32%	18
Oceania	19	7	26	5%	5
South America	4	9	13	2%	7
The World	344	196	540	100%	96

Golf has its origins in the sandy ground along the British coastline. The naturally draining soils and moderate climate were ideal for the sport to develop along what was called “linksland”. As golf increased in popularity and a growing middle class could afford to participate, courses sprang up on less than ideal sites that had to be especially prepared for golf, including open meadow, farmland and tree-lined parkland. Thus was born the craft of golf architecture and with it, a whole industry of golf course development and management. In the process, even more diverse lands became cultivated for golf, including deserts, mountains, landfills and purpose-built residential suburbs.

Many of the original British links courses were on public land and technically open to common play. As the sport travelled overseas and got established in the the USA, Continental Europe, Africa and Asia, it acquired the cachet of private exclusivity.

Private clubs dominated and a century ago publicly accessible courses were only a minor share of the total available. However, this has been changing and now the vast majority of golf courses are open to the public. This remains the case with the bulk of development projects documented in this report.

Worldwide, there are 540 new golf course projects in various stages of planning (344) or active construction (196). These developments span 96 countries. Of these emerging golf courses, almost two-thirds are associated with resort developments. This highlights a functional affinity among golf, tourism and economic development.

Golf development trends suggest a modest tipping of the share towards Asia. Since 2016, for example, the United Kingdom opened up 21 courses while Vietnam opened up 27. Asia’s 155 courses currently under development represent 28% of all projects,

well above its share of current global supply. In the last decade, it opened up 101 courses, representing 30% of all courses opened since 2016. Europe's 128 courses in development is 24% of all such projects, in line with the region's current supply of courses. The North American share, totaling 175, represents 34% of projects in development. This highlights a trend towards a very modest decline as golf makes more inroads globally. Africa's share of new development, 8%, includes 43 courses in planning and/or construction and suggests a modest trend towards a greater global presence. Oceania, with

5% of development (26 courses) and South America, with a 2% share for its 13 projects in planning and/or construction, both represent steady-state numbers for the near future in terms of world share of golf course inventory.

A few secondary trends are identifiable in all of the data. European development has moved eastward with non-traditional golf countries such as the Czech Republic, Montenegro and Poland all sporting new projects that are tied to residential and resort development. Asia and the Middle East is seeing steady development across its entirety, from Gulf States like Bahrain, Qatar, Saudi Arabia and United Arab Emirates, to tourist hot beds like Thailand and Vietnam, with both India and Pakistan focusing on indigenous markets and residential development. South American development, while limited, is decidedly oriented towards using golf to develop domestic markets (Ecuador) or to help overall development of a country seeking to build upon the infusion of Western capital and business (Guyana).

Throughout the world, golf is used as a driver, not just of sport and leisure, but of regional planning and community build out. Economically inventive projects have to be embedded in local environmental conditions that help shape the distinctive quality of the outcome. It's an approach to golf course architecture these days where developers and designers work with, rather than against, the terrain. They coordinate their efforts with sophisticated land use planning. Given the tight regulatory culture today and the scrutiny of everything from even minor disturbance of the land to turf maintenance programmes utilising pesticides, course managers need to ensure the long-term viability of their projects. The approach has also made considerable inroads in the USA, where the new project development has taken a back seat to major renovations designed to make an established, older facility more viable and sustainable in terms of enhanced business viability, more sustainable ecology and enhanced golfer participation.

96

countries have active golf projects in development

28%

of the world's golf projects are in Asia and the Middle East

64

countries opened new courses between 2016-2020

New golf courses opened 2016 – 2020¹

Region	2016	2017	2018	2019	2020	Total	Countries
Africa	6	4	4	7	2	23	9
Asia & the Middle East	29	20	25	18	7	99	25
Europe	21	30	10	9	13	83	19
North America (incl. Caribbean & Central Am)	31	32	15	17	20	115	6
Oceania	3	1	-	1	2	7	2
South America	4	3	4	-	-	11	3
The World	94	90	58	52	44	338	64

¹ As of 31 October 2020

Africa: Overview.



Africa is golf's most under-developed region. With 20% of the earth's land mass and 17% of its population, Africa is home to only 2% of all golf courses. This represents a distribution of 109,822 people per golf hole, which is eight times more than the worldwide distribution of 14,306 people per hole.

Golf initially took hold in major trading centres where large expatriate and settler communities sought to reproduce the comforts of homeland Great Britain, especially in South Africa, but also throughout the region. The strong local tradition of golf at such classic-era courses as Durban Country Club and Royal Johannesburg in South Africa or Royal Nairobi in Kenya were an important part of leisure life for businessmen but kept the sport isolated from the local middle class and the indigenous population at large.

Recent development has seen cultivation of both a tourist market as well as indigenous national play. This has been spurred on by greater recognition of golf as an inherently engaging sport as well as one that affords access on the competitive world stage for elite players.

It took the worldly travels of a few accomplished golfers to start opening up the region to golf. Hall of Famers Bobby Locke, Gary Player and Ernie Els were all prominent South African sportsmen who helped popularise golf. Player, the third golfer ever to win the coveted professional majors Grand Slam, was particularly influential, taking a leadership role in developing golf participation in his home country. Those initial efforts have lately been furthered by four-time major championship winner Els, whose Ernie Els & Fancourt Foundation promotes golf, education and life skills among needy youth.

Africa: Development

Africa has 43 active golf course projects across 15 countries in various stages of design, construction and grow-in. This represents a 5% expansion rate from its existing supply of 930 golf courses, making it the fastest growing region in the world for development of golf facilities. In those African countries developing golf, the emphasis is on real estate communities intended to meet the lifestyle choices of the country's growing middle class. The development stage for new courses is often protracted due to market uncertainties and government instability. Recently, Morocco has been the region's fastest developing golf market, with over half of its current inventory of 61 courses having opened in the last decade. One index of the growing maturity of the African golf market is that in addition to new golf projects there are a number of major renovations and expansions of older, existing golf courses.

Project Profiles

Marchica Lagoon Resort, Nador, Morocco (Ron Garl)

The crystalline Mediterranean Sea is the foreground for this unique golf resort, located between the Spanish autonomous city of Melilla and the Moroccan coastal city of Nador. With both cities home to airports that provide direct access to the African continent, it is a popular holiday destination for Europeans. Now golf will be part of the picture as well, thanks to a nine-hole short course and IMG Golf Training Academy at the Marchica Lagoon Resort.



Credit: Ron Garl

The five-star 90-room Marchica Hotel and Spa occupies a stunning waterfront site at the point where Mount Gourougou (elev. 900 metres) tumbles into Marchica Lagoon. The salt water lagoon sits behind a man-made, 16-mile long sand bar and provides a placid setting for this resort. So placid, in fact, that the King of Morocco built one of his royal palaces on a hill overlooking the whole setting. Golf architect Ron Garl, who won an international design competition for the project, says "it might be the only ocean front range in the world – certainly the most beautiful." The 50-acre golf facility, part of which was created with fill hauled onto the site, features a full-length, 30-bay range, short-game area, par-3 course (holes ranging 60-270 yards) and swing analysis laboratory. Future plans, temporarily slowed by the Covid-19 pandemic, aim for an 18-hole golf course on the inland side of the property that would wrap around the royal residence and offer views throughout of the Mediterranean. The resort is part of IMG Prestige, IMG's global reciprocal network.



Kigali Golf Course, Kigali, Rwanda

Credit: Gary Player Design

Asia & the Middle East: Overview.



From golf's earliest days in Asia, the sport was cultivated at private clubs as a crucial part of the international business culture and lifestyle. This was a legacy of colonial administration and lifestyles where local populations were excluded from the rhythms of everyday leisure and golf was reserved for elite tradesmen and members of the modernising, pro-Western ruling markets. Across the golf scene in this region, 45% of golf courses count themselves as private clubs, compared to 20% defined as membership-only worldwide, within the golf world as a whole. However, that lingering effect is now waning. Today, that mix is shifting decidedly towards the resort side as well as attracting an emerging local middle-class and business clientele. In recent years, we have seen a spate of new projects designed to attract domestic and international tourism in countries in Asia and the Middle East.

Asia & the Middle East: Development

In the last 20 years, there has been phenomenal growth in Asian golf facilities with Japan (3,140), Republic of Korea (810), China (617), Thailand (317) and a newcomer to the list, India (294), now among the top-20 countries in course supply. Resort development has driven much of golf's growth in this region. Thailand's Phuket Island and Vietnam's coast along the South China Sea have become popular golf destinations. Impressive evidence of a 'new wave' in course design excellence can be found in the nine contemporary Asian and Middle East courses from five countries on the Golf Digest list of the World's 100 Greatest Golf Courses: South Cape Owners Club, Korea (No. 9); Shanqin Bay, China (No. 14); Club at Nine Bridges, Korea (No. 18); Yas Links, United Arab Emirates (No. 48); Jack Nicklaus GC, Korea (No. 54); Haesley Nine Bridges, Korea (No. 67); Bluffs Ho Tram Strip, Vietnam (No. 76); Sheshan International GC, China (No. 85); Ba Na Hills, Vietnam (No. 89); and are wide-ranging, from private clubs to resorts with a residential component and comprehensive real estate communities offering the latest in security, convenience and high-tech living, recreation, health care and schooling.

Asia's prominence in the golf world has been aided by its exposure on elite circuits. The Asia-Pacific Amateur Championship, launched in 2009 by The R&A and the Masters Tournament, has been held nine times in the region. The winner of the championship secures exemptions into The Open and the Masters Tournament. While the Covid-19 pandemic dramatically interrupted the event calendar for professional golf, the region's courses are regularly featured as venues for LPGA, European Tour, PGA TOUR and World Golf Championship events.

Asia, including the Middle East, has

17%

17% of the world's golf facilities and has

28%

of new golf projects

Asia, including the Middle East, is home to

61%

of the world's population on

20%

of the earth's land mass

Project Profiles

DHA Rumanza Golf Course, Multan, Pakistan (Sir Nick Faldo)

As the country develops a thriving economy there is growing interest in the kinds of gated, self-contained communities that have become commonplace in Western society. Now comes DHA Rumanza in the Chenab River valley of southern Punjab, 16 miles north of Pakistan's seventh largest city, Multan (pop. 2 million). Rumanza is the product of an investment by a state-owned enterprise, the Defence Housing Authority, and includes plans for hundreds of 3-5 bedrooms villas and free-standing residences, along with extensive commercial and retail space, hospital and medical centres, a nursery garden, schools, banquet hall and a grand mosque. The site encompasses 3,642 hectares/9,000 acres of which the golf course occupies an 80-hectare/198-acre parcel of pure sand with only 3-4 ft of elevation and offers a pliable palette for designer Sir Nick Faldo and his two associates, Andrew Hagggar and Gareth Williams. Plans call for a core routing of returning nines arrayed in counter-clockwise loops, with housing on the perimeter. Nine holes have been fully grassed in Paspalum Platinum TE, the rest to be covered by April 2021, with a course opening planned for October 2021.



Credit: Andrew Hagggar



Middle East	
Bahrain	6
Iran	1
Israel	1
Jordan	3
Kuwait	2
Oman	7
Qatar	6
Saudi Arabia	13
Syria	1
United Arab Emirates	31
Total	71

29%

Asia has been home to 41% of new course openings since 2016

Project Profiles

Ballyshear Golf Links, Sumat Prakan, Thailand (Gil Hanse)

This private club, 25 miles southeast of Bangkok, is American architect Gil Hanse's first venture in East Asia. The 18-hole core routing embodies a retro, links-style that represents the growing sophistication of the Thailand golf market. The 140-acre site, virtually treeless, open to the winds and surrounded by rice paddies, occupies the ground of the old Kiarti Thaneer Golf Course. Considerable stabilisation of the low-lying site was needed, including 1,500 concrete pilings, a capped subgrade and sand capping half a foot thick. The hole sequence emulates the bulk of the old, famous Lido Golf Club on Long Island, New York (1919-1939), a legendary Charles Blair Macdonald and Seth Raynor design which showcased classical and innovative strategic design principles. Shaping was done by Hanse's own crew from Cave Man Golf, including Hanse himself, Bret Brennan and Josh McFadden, Trevor Dormer and Tanner Guyer. Construction is being completed on the front nine and grow-in well underway, with the formal opening planned for August 2021.



Asia golf score card	
Land area	28,201,258 km ² / 10,888,518 miles ²
Countries	53
Golfing countries	48
Golf courses	6,323
Golf holes	87,072
Golf facilities	4,477
Golf courses under development	153
Private courses	1,608
Publicly accessible courses	4,715
Population	4,640,251,290
Population per golf hole	54,649

Europe: Overview.



The naturally occurring British links were ideal golf ground in terms of drainage capacity to sustain native grasses and the suitability of the playing surface. The craft of golf course architecture emerged only in the late 19th century as golf development moved inland; designers had to work hard to emulate an acceptable version of those natural conditions on inland sites with heavier soils. These practitioners then exported their craft throughout the world: among them, Willie Park Jr, Donald Ross, Alister MacKenzie, Tom Simpson, Harry Colt and Charles Alison.

The growth of golf throughout Great Britain and Ireland was helped dramatically by a rising middle class of citizens and by a vast network of railways that linked city to country and that brought far-flung holiday destinations within easy reach of holidaymakers. British Railway posters, today a valuable collector's item, attest to the appeal of golf destinations like St Andrews, Turnberry and Cruden Bay in Scotland and Royal Birkdale and Westward Ho! (Royal North Devon) in England, to those living in London and Manchester.

Golf's spread to continental Europe was uneven. It took naturally to the dune-like formations of coastal lowlands in the Netherlands and Belgium but was more sporadic in establishing itself in major capital cities and along the French Riviera. The post-World War Two advent of popular middle class holiday destinations in such readily accessible regions as Portugal's Algarve and Spain's Andalusia helped establish golf's reputation as a cornerstone of European tourism.

Europe: Development

Today, golf is well established throughout the north and west of Europe and is making steady progress into the central and southeastern regions. Europe claims half of the top-20 countries in terms of golf courses: No. 3, United Kingdom (3,101); No. 6, Germany (1,054); No. 7, France (811); No. 9, Sweden (650); No. 11, Spain (493); No. 14, Ireland (365); No. 15, Netherlands (350); No. 17, Denmark (347); and No. 19, Italy (312). Anyone who might have questioned the European temperament for golf need only recall the football stadium excitement conveyed by the massive home crowds at Le Golf National outside Paris for the 2018 Ryder Cup. Much the same atmosphere is likely to be central to the 2023 Ryder Cup at Marco Simone Golf & Country Club outside Rome. The popularity of these sporting events has spawned efforts by national golf bodies to encourage participation and build scaled-down, accessible, affordable golf facilities.

Europe has

10%

of the world's population

18%

of the earth's land mass and

23%

of all golf courses in the world

Europe is home to

130

golf course developments in

26

countries, representing

24%

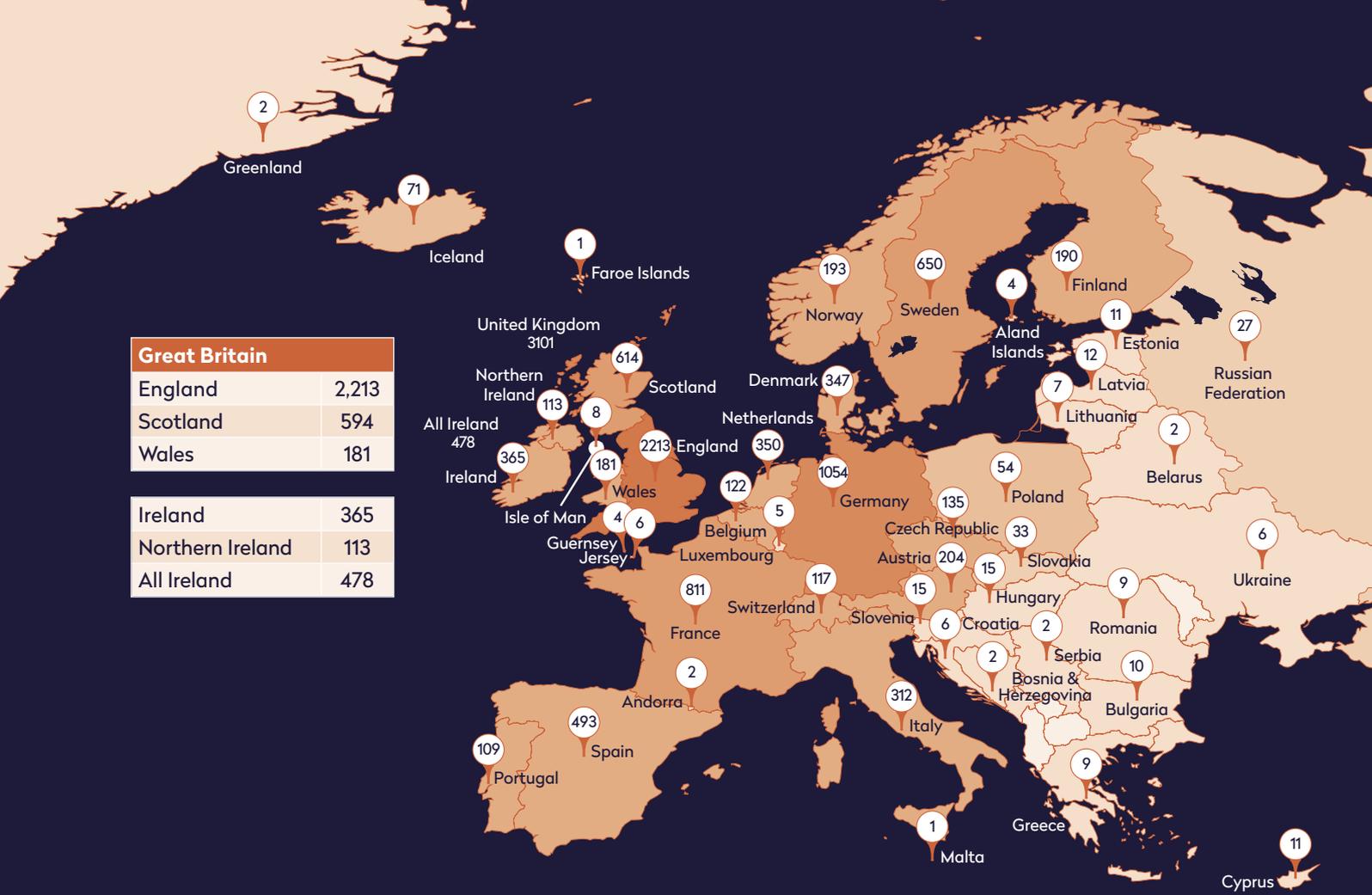
of the world's development total

Project Profiles

St Patrick's Links Golf Club, County Donegal, Ireland

(Tom Doak)

This 18-hole course has had quite the development history. Tom Doak's design is actually the third version of golf on this site. Apparently, the north of County Donegal, overlooking Sheephaven Bay, is simply too tempting to let it lie fallow all of these years, though that was the fate of an initial 36-hole design plan, as well as a follow-up effort by Jack Nicklaus for 36 holes. The property sits just south of the Rosapenna Hotel and Golf Resort, which already has two famous links courses in the Old Tom Morris Links (1893) and Sand Hills Links (2003). The hotel bought the site in 2012 from NAMA, the distressed asset agency set up by the Irish government following the financial crash of 2008. Now, after years of sitting untouched comes a third course on the rolling sandy ground between the beachfront dunes and open farmland. Doak did not just design the course, he also "produced it" by raising the money for construction (under €3 million) among private investors. Plans aim for it to be operated as part of the resort, with a private membership component as well. Only minimal irrigation was needed, with the course seeded to fescue. The fairway corridors do not quite match up to any of the earlier routings and enable golfers to play over walkable connections and through some towering dunes formations. Doak was on site through much of the basic construction, at least until the Covid-19 pandemic shut things down temporarily in March 2020. The course was scratched into the existing topography, with Doak's team from his design/build firm, Renaissance Golf – including Eric Iverson, Clyde Johnson and Angela Moser – shaping the greens, tees and bunkers. The new course is expected to be open for play in June 2021.



Great Britain	
England	2,213
Scotland	594
Wales	181

Ireland	365
Northern Ireland	113
All Ireland	478

Project Profiles

Twin Chapels Golf Resort, Prague, Czech Republic (Jonathan Gaunt)

This 18-hole championship resort layout plus nine-hole, par-34 short course and full-scale range and short-game practice grounds sits on 250 acres of free-draining sandy soils in the Central Bohemian Upland. The course, only ten miles northeast of central Prague, has been designed by British golf course architect Jonathan Gaunt. The project development team, Golf Vinor, is committed to environmental sustainability. Irrigation for the course is provided by recycled water piped in from the city of Prague. The project derives its name from two small chapels on site that commemorate the 17th century St Wenceslaus Pilgrimage Route. Construction is now completed and the golf course is growing in, with an expected opening date of mid-2021.



Credit: Jonathan Gaunt

Europe opened

83

new courses
between
2016-2020

24%

of the world's
total openings
in that period



Europe golf score card	
Land area	26,315,742 km ² / 10,160,482 miles ²
Countries	53
Golfing countries	43
Golf courses	8,888
Golf holes	124,290
Golf facilities	7,078
Courses under development	130
Private courses	810
Publicly accessible courses	8,078
Population	748,900,178
Population per golf hole	6,025

North America, Central America and the Caribbean: Overview.



In North America, 76% of golf facilities are now public and open to fee-paying golfers on a round-by-round basis. A century ago, by contrast, the sport was dominated by the private membership clubs, with public-access golf an afterthought. While many of these clubs have held onto their reputations as the venues of prestigious championships, the sport is now more characterised by daily-fee, resort and municipal facilities.

One revealing fact illustrating this trend is the recent commitment of the USGA to staging its US Open on public courses. From 1895 to 1971 the US Open was played entirely at private clubs. Over the next 27 years the US Open took place on a public course only three times, all at Pebble Beach Golf Links in California (1972, 1982, 1992). Then things changed. From 1999 through 2021, the USGA will have staged 12 out of 23 US Opens at six different public venues, three of them municipal layouts.

North America, Central America and the Caribbean: Development

The total number of golf facilities in the USA and Canada had been slowly declining in recent years, following a boom in new course construction in the 1990s and early 2000s. This has been a function of growing competition for real estate and commercial development, as well as a reflection of healthy focus of golf facilities upon business sustainability. Despite the difficulties of an interrupted golf calendar in 2020 due to the pandemic that affected play as well as course construction schedules, there is now evidence of an uptick in the regional market, with 115 course openings in six countries between 2016-2020 and 175 projects underway in 18 countries.

In an effort to retain golfers and bolster the appeal of the sport, many course operators are innovating with design features that entail less of a time commitment and more of an immediate reward. These facility adjustments include short-game practice areas, expanded ranges, par-3 courses of nine holes or less (The Cradle at Pinehurst Resort, NC); family putting courses (The Punchbowl at Bandon Dunes, OR); and sophisticated tee-sheet management that allows for 3-hole or 6-hole loops on under-utilised stretches of the golf course. While countries in the Caribbean and Central America are relying upon luxury golf resorts as an engine of economic development to boost local employment through international tourism, short courses and putting courses have made inroads there as well, in some cases on a stand-alone basis.

76%

of golf courses in North America are open to the public

The USA opened

27

courses between 2019-2020

Project Profiles

The Refuge, Flowood, Mississippi, United States

(Nathan Crace)

Efficiency in a municipal setting is a virtue. Case in point: this publicly owned and operated course in the suburb of the state's capital city, Jackson, bordering Jackson-Medgar Wiley Evers International Airport. The course has now been completely transformed by architect Nathan Crace thanks to a rerouting that includes all new greens and lined bunkers, tree work, expanded fairways, major irrigation adjustments and a new continuous cart path loop – all for \$1.9 million. With the emphasis on fun and access, the course has also been outfitted with the Longleaf Tee System for yardage markers ranging from 4,000 to 7,000 yards. The rerouting gives golfers the option of playing a 5-hole round if they don't have time or inclination for 9 or 18 holes. The publicly funded rerouting and upgrade was undertaken to make the course more attractive to guests and business people who will be coming to the new, privately funded, \$50 million, 200-room resort and conference centre that is rising on an adjoining parcel. Of the entire 210-acre site, the golf course occupies 150, with 85 of it maintained and the rest gone native or comprising ponds and wetlands. The golf grounds are low lying, with all of six feet of elevation change across the site, and designed to impound drainage water into a series of ponds. The course, planned to open in mid-2021, has already won an "Environmental Excellence Award" from the American Society of Golf Course Architects.



Credit: Nathan Crace

North America
accounts for

16%

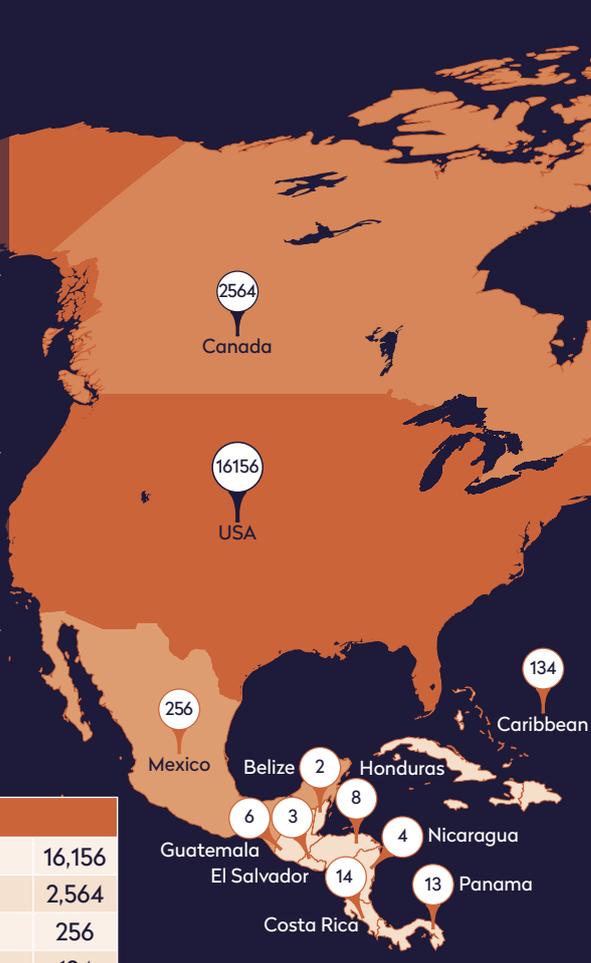
of global landmass

8%

of world population

50%

of the world's golf supply



North America	
United States	16,156
Canada	2,564
Mexico	256
Caribbean	134
Central America	50
Total	19,160

Caribbean	
Anguilla	1
Antigua and Barbuda	2
Aruba	2
Bahamas	13
Barbados	7
Bermuda	6
Bonaire, Eustatius, Saba	1
Cayman Islands	2
Cuba	3
Curacao	3
Dominican Republic	35
Grenada	1
Guadeloupe	1
Haiti	1
Jamaica	11
Martinique	1
Puerto Rico	22
Saint Kitts and Nevis	6
Saint Lucia	2
Sint Maarten (Dutch)	1
St Vincent and Grenadines	1
Trinidad and Tobago	8
Turks and Caicos Islands	1
Virgin Islands, US	3
Total	134

76%

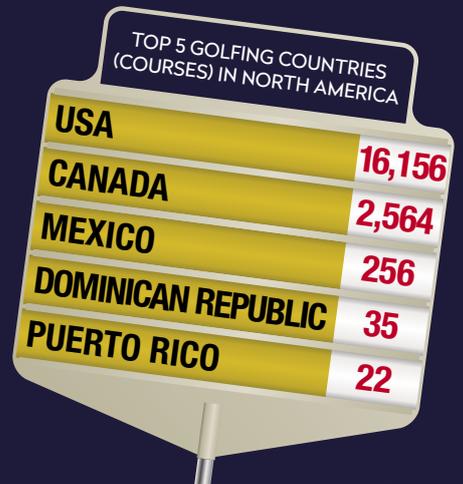
of golf courses in North America
are open to the public

Project Profiles

The Pit, Mexico City, Mexico

(Agustin Pizá)

In a departure from the normal 18-hole golf facility is development of a new concept for short game practice and relaxation. The Pit, on a private estate in Mexico City and opened in 2020, is the first of what innovative Mexican-based golf course architect and land planner Agustin Pizá anticipates as a trend among those looking to maximize golf utilisation of small areas – in this case two acres. It's also something he has seen a need for in his work as director of The First Tee program in Mexico. The initial Pit is a smartened up back yard short game area and social gathering space; it features a serpentine 12,000 square foot green, six-foot-deep riveted bunkering and multiple teeing grounds that allow for shots as long as 80 yards in the air to be played. Subsequent iterations of The Pit planned for a housing development in Valle de Bravo Mexico, 80 miles west of Mexico City, and as a public amenity within a residential master planned community in Hermosillo, 1,180 miles northwest of the capital city. What was born out of the needs and character of a crowded metropolis like Mexico City with its dearth of greenspace might well become an alternative model for golf development elsewhere.



North America golf score card	
Land area	24,256,000 km ² / 9,365,000 miles ²
Countries	40
Golfing countries	34
Golf courses	19,160
Golf holes	282,372
Golf facilities	16,733
Golf courses under development	175
Private courses	4,711
Publicly accessible courses	14,633
Population	592,015,432
Population per golf hole	2,097

Oceania: Overview.



Oceania shows the influence of Great Britain on golf's worldwide diffusion. Australia and New Zealand, whose settlement dates back to 1789, are among the world's leading countries in terms of golf courses. Australia, with 1,584, ranks No. 5; New Zealand, with 416, ranks No. 13. Together, they contain 96% of the region's courses. Well behind them on the list are Papua New Guinea with 15 and Fiji and Guam both have 14. Overall, the vast Pacific region covered by Oceania comprises 5% of the world's land mass, 0.5% of the population, and 5% of its golf course supply.

The rough and tumble character of the early settlers in Australia and New Zealand eventually contributed to a populist golf culture that saw the sport take hold throughout society and virtually in every small town. The region remained largely isolated from the early growth of golf course architecture until a famous journey there by course designer Alister Mackenzie in 1926 that saw him redesign a dozen major courses along the coastline from Sydney through Melbourne and on to Adelaide.

The majority of golf courses in Australia are located along the coast. That's no surprise for a country with 85% of its population living within 30 miles of the shore. Australia's most populated state, New South Wales, centered in Sydney, forms 14% of the country's land mass but is home to 27% of its golf courses. Victoria, built up around Melbourne, has only 4% of the country's land mass but is home to 25% of all its golf courses. By contrast, Western Australia, the country's biggest state, has 43% of the landmass but only 14% of the country's golf.

It helped the cause of golf in Australia and New Zealand that the sport was taken seriously by competitive sportsmen and women who won major championships, some of whom achieved World Golf Hall of Fame status: Walter Travis, Peter Thomson, Kel Nagle, Sir Bob Charles, Jan Stephenson, David Graham, Greg Norman, and Karrie Webb. In 2006, they were joined by an inaugural representative from the rest of Oceanian golf, Vijay Singh of Fiji.

Oceania: Development

As well established as golf courses have been over the last century in Australia and New Zealand, there have been some dramatic breakthrough projects lately that have drawn worldwide attention. It's part of a bold worldwide uptick in the quality of golf course design – equivalent to a Second Golden Age as a follow on to the first one (primarily in North America in the period 1919-1939). Among the contemporary designs that have achieved the ranks of Golf Digest's World's 100 Greatest Golf Courses are three on the coast of New Zealand's North Island: Tara Iti by Tom Doak (No. 2); Cape Kidnappers, also by Doak (No. 22); and Kauri Cliffs, designed by David Harman (No. 43). On the coast of New Zealand's South Island, Jack's Point Golf Course by John Darby (No. 44) also ranks. The one inland course, also on the North Island, is Kinloch, by Jack Nicklaus (No. 94).

In Australia, all of the recent openings to make the prestigious world top-100 sit in the country's southeast: Tasmania's coast has become a focal point of daily fee golf, most notably through links-style courses at Barnbougle Dunes Course, by Doak & Michael Clayton (No. 16), Barnbougle Lost Farm by Bill Coore & Ben Crenshaw (No. 47) and Cape Wickham Links by Mike DeVries (No. 21). Two newcomers from Victoria also made the list: St Andrews Beach by Doak and Clayton (No. 92) and National Golf Club – Moonah Course by Greg Norman (No. 97). The one strictly inland newcomer to the list from all of Oceania is Ellerston, in New South Wales, also by Norman (No. 19).

Development beyond these traditional centres of golf in the rest of Oceania have been slowed of late because of environmental concerns, especially the threat posed by rising sea levels to endangered low lying areas.

Australia accounts for

76%

of golf courses in Oceania

26

new golf courses under development
in Oceania



Arm End, Hobart, Tasmania, Australia

Credit: Paul Mogford



Oceania	
American Samoa	1
Antarctica	-
Australia	1,584
Cook Islands	2
Fiji	14
French Polynesia	3
Guam	14
Kiribati	1
Marshall Islands	1
New Caledonia	4
New Zealand	416
Niue	1
Norfolk Island	1
Northern Mariana Islands	8
Papua New Guinea	15
Samoa	4
Solomon Islands	1
Tonga	2
Vanuatu	5
Total	2,077

Project Profiles

Arm End, Hobart, Tasmania, Australia (Neil Crafter & Paul Mogford)

With two world-class public courses on its north end (Barnbougle and Lost Farm), Tasmania is already something of a mecca for quality daily-fee golf. Now Australia's smallest and least populated state is getting its first public-access course on the south coast, this one on a peninsula near the capital city of Hobart. Arm End, designed by the Melbourne-based team of Neil Crafter and Paul Mogford, will occupy a stark, treeless, horseshoe-shaped 121-hectare/300-acre headland that juts out into waters where Storm Bay gives way to the Derwent Estuary. The private development firm of Mary Ann's Island Pty. Ltd has arranged a 50-year lease on the land, which is owned by the state government of Tasmania. Irrigation water for the project will come by way of a two-mile pipeline being built across the estuary, bringing recycled water from Blackmans Bay near Hobart. A feature of the development is an integrated approach to combining public recreation facilities such as shelters, open lawn areas and picnic points – along with golf. Revenue from the project will help sustain an environmentally sensitive recreation area, replete with native revegetated areas, beachfront, shoreline stabilisation, reclaimed dunes, bird and wildlife sanctuaries and a shared walking/bicycle trail that will weave around and through the grounds. Preliminary site work has begun, with an anticipated opening in 2023.



Oceania golf score card	
Land area	7,687,000 km ² / 2,968,000 miles ²
Countries	29
Golfing countries	18
Golf courses	2,077
Golf holes	29,784
Golf facilities	1,965
Golf courses under development	26
Private courses	124
Publicly accessible courses	1,953
Population	42,273,644
Population per golf hole	1,419

South America: Overview.



Recent developments in South America have raised hopes for the development of golf across the continent. The 2016 Olympic Games in Rio, Brazil featured golf for the first time since 1904 – and at the first Olympiad held in South America.

It was impressive enough that the Gil Hanse-designed Olympic Golf Course and the rest of the Olympic facilities were finished on time and ready for the Games. The layout's environmental sensitivity in terms of its light footprint on the ground is intended as a model for future golf development.

The development of the game in Brazil has been hampered by political turbulence and growing economic inequality. Elsewhere there is reason for optimism, as with the maturation of the Ecuadoran economy and the subsequent development of its coastal area. Likewise, the advent of Guyana as an oil state and the massive infusion of state revenue from industrial investment.

South America: Development

The region's amateur golf scene received a major boost starting in 2015 with the advent of the Latin America Amateur Championship, introduced by The R&A, the Masters Tournament and the USGA. In one bold move, the region's finest amateurs have a much-accelerated path into world class competitive circles.

Traditionally, the South American golf scene has been dominated by private clubs – 51% of all courses, more than double the rate for the world, where 20% of all golf is in the public sector. Recently, the balance in South America has been tipping, thanks to the recent advent of resort and public access facilities. The continent has added 11 courses since 2016, representing 2% of its current golf inventory.

Project Profiles

Maraiko Bay Golf & Country Club, Mahaicony, Guyana

(David Hemstock)

Guyana, on South America's northern shore along the Atlantic Ocean, is booming as a newcomer to the offshore oil trade. The influx of engineers, businessmen, technicians and labourers from the likes of Exxon-Mobil, Hess Corp. and CNOOC International has created a surge of investment, as well as demand for Western lifestyles of living and shopping. That's the logic driving the locally based development team from CIMGRO's commitment to Maraiko Bay Golf & Country Club, a bold residential, commercial and recreational development on 416 hectares / 1,029 acres coastal frontage 23 miles southeast of the capital city of Georgetown. Maraiko Bay is the point where the Mahaica River empties into the ocean. This is Guyana's first such multi-purpose, luxury project. Master planning of the site, including design of an 18-hole golf course, is by the British company Hemstock Design Ltd; land plan by Dr Ollie Hemstock; and golf design by David Hemstock. The golf layout, routed as two nine-hole loops, flows in single fairway corridor style through and alongside prestige residences (studio apartments to 4-bedroom houses), upscale shopping, international schools, hospital and medical centres, nature preserves and a 240-berth marina. The par-72 course stretches to 7,800 yards, though four more forward sets of markers will assure playability amidst strong seasonal winds. The front nine occupies inland ground on the far side of an old drainage channel, the Bellamy Canal, which used to serve the area's sugar plantations. The back nine sits on the ocean side of the canal, with holes 14-16 running on the shoreline. Until now Guyana's several hundred golfers have only had access to a single, nine-hole layout. Maraiko Bay will change all of that.



Montecristi Golf Resort, Montecristi, Ecuador

Credit: Kris Savignac

South America has

2%

of world's golf facilities

8%

of new golf projects

50%

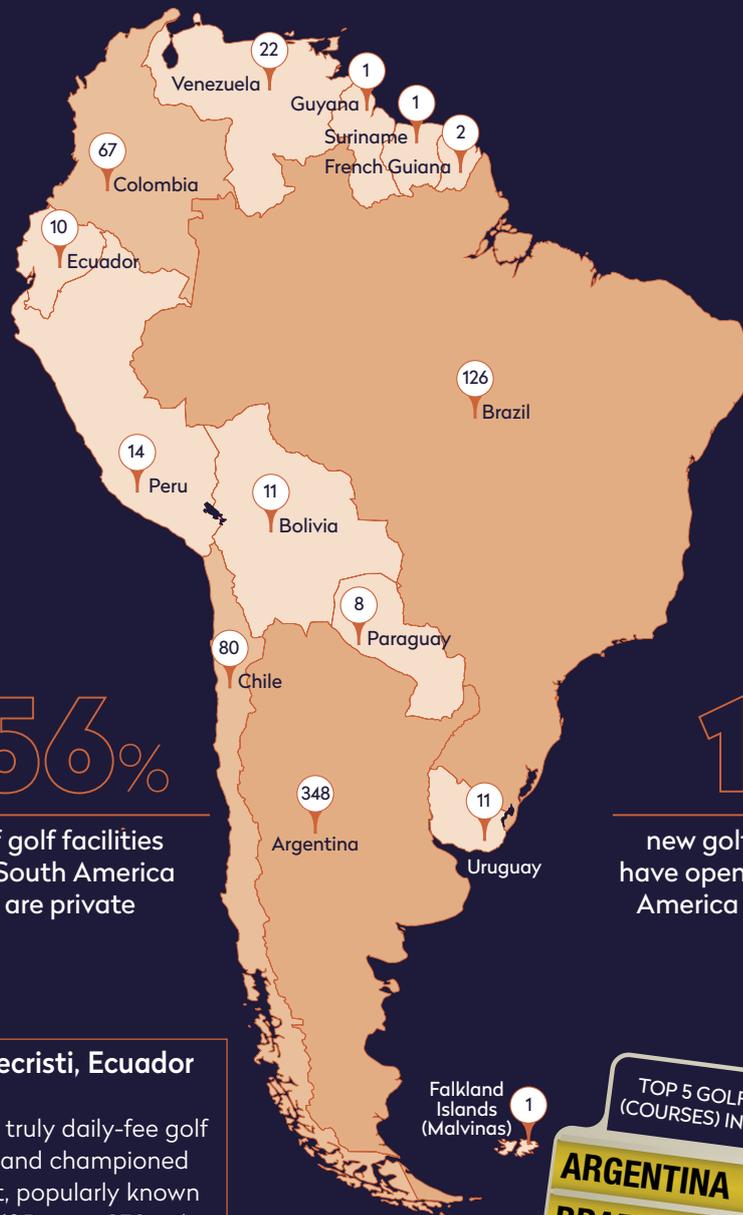
of the region's
golf courses are
in Argentina

56%

of golf facilities
in South America
are private

11

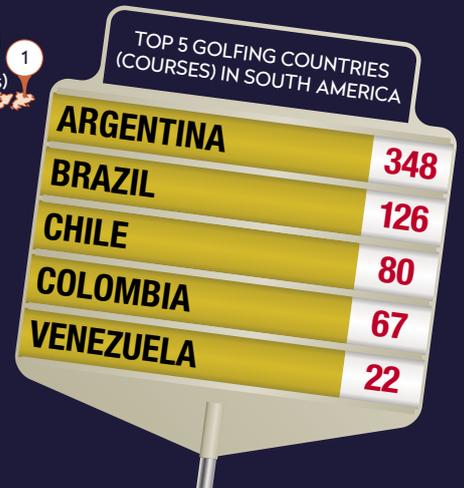
new golf facilities
have opened in South
America since 2016



Project Profiles

**Montecristi Golf Resort, Montecristi, Ecuador
(Kris Savignac)**

Hats off to Ecuador's first and only truly daily-fee golf course – in the town that invented and championed manufacture of the Montecristi hat, popularly known as the Panama hat. Montecristi Golf Resort, 250 miles southwest of Ecuador's capital city, Quito, lies just inland of the popular coastal beach and port city of Manta. The golf course is part of an ambitious 1,200 hectare / 2,965 acre planned community with 1,005 home sites, the first part of which includes the golf course, clubhouse and practice range. The course designer is Kris Savignac who worked closely with shaper Jerry Darrough in creating feature out of the foothills desert terrain. The course, with 100 ft of elevation, changes from a base level of 325 ft above sea level, wends its way through (future) home sites in a continuous out-and-back loop. It offers views of the Pacific Ocean, only eight miles away, and benefits from the ambient cooling of moist air coming down from Cerro Montecristi, elevation 1,965 ft, just two miles to the south. The \$50 green fee includes a cart and has proven popular with both locals and tourists. Savignac's commitment to modest, affordable golf is also evident in two micro-projects he has in nearby San Jose, just down the coast from Manta. There, on ocean-front ground at a resort style residential development called Terrazas Del Mar, he is building a 1.5 hectare pitch and putt course and a one-hectare, nine-hole putting course.



South America golf score card	
Land area	17,819,000 km ² / 6,880,000 miles ²
Countries	15
Golfing countries	14
Golf courses	702
Golf holes	9,141
Golf facilities	647
Golf courses under development	13
Private courses	361
Publicly accessible courses	342
Population	430,759,772
Population per golf hole	47,124

Definitions.

Methodology

The NGF, a U.S. based non-profit trade association, maintains the definitive database of golf courses in the world. Existing golf courses are verified on a 24 month cycle (12 months in the U.S.) by way of email surveys, international call centres, the assistance of golf associations and management companies, satellite imagery, internet and social media sources. In addition, new golf course developments are identified and monitored – from planning stages through to opening – via a network of course designers, architects, builders and course suppliers around the world, and through extensive media monitoring.

Golf course

A tract of land designed to play golf which contains six, nine or 18 holes. Golf courses are defined by the architect's layout and hole configuration depicted on the scorecard. For example, a golf facility with 27 holes could be configured as three 9-hole courses or one 18-hole course and one 9-hole course.

Golf facility

A location at which golf can be played on one or more golf courses.

Public golf course

A golf course that provides public access and may also offer memberships.

Private golf course

A golf course at which play is largely restricted to members and their guests.

Real Estate-related course

A golf course that is located in, and considered an integral part of, a real estate development.

Resort course

A golf course that is affiliated with a hotel or other lodging and is usually located in a setting that includes additional amenities such as tennis, swimming, gym facilities, restaurants, etc.

Golf course development project

A new golf course that is currently in one of the following stages of development:

- **In-planning** – A designer/architect has been selected, specifications are being written, key decisions are being made, funding is being secured and permitting applications are being filed.
- **Under construction** – Ground has been broken and work is underway.
- **Completed/Open** – A golf course that is now open for play.

ISO list of countries

All country information is based on the ISO list of countries published by the International Organisation for Standardisation (ISO), and defines the names of countries, dependent territories, and special areas of geographical interest.

Population

United Nations Development of Economic and Social Affairs/Population Division World Population Prospects: The 2018 Revision.

Land area

www.worldatlas.com

Regions.



AFRICA

Algeria, Angola, Benin, Botswana, Burkina Faso, Burundi, Cabo Verde (formerly Cape Verde), Cameroon, Central African Republic, Chad, Congo, The Democratic Republic of the Congo, Cote d'Ivoire, Djibouti, Egypt, Equatorial Guinea, Eswatini (formerly Swaziland), Ethiopia, Gabon, Gambia, Ghana, Kenya, Lesotho, Liberia, Libya, Madagascar, Malawi, Mali, Mauritius, Mayotte, Morocco, Mozambique, Namibia, Niger, Nigeria, Reunion, Rwanda, Saint Helena, Senegal, Seychelles, Sierra Leone, South Africa, Sudan, United Republic of Tanzania, Togo, Tunisia, Uganda, Zambia, Zimbabwe



EUROPE

Aland Islands, Andorra, Austria, Belarus, Belgium, Bosnia and Herzegovina, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Faroe Islands, Finland, France, Germany, Greece, Greenland, Guernsey, Hungary, Iceland, Ireland, Isle of Man, Italy, Jersey, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Norway, Poland, Portugal, Romania, Russian Federation, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Ukraine, **United Kingdom:** England, Northern Ireland, Scotland, Wales)



OCEANIA

American Samoa, Antarctica, Australia, Cook Islands, Fiji, French Polynesia, Guam, Kiribati, Marshall Islands, New Caledonia, New Zealand, Niue, Norfolk Island, Northern Mariana Islands, Papua New Guinea, Samoa, Solomon Islands, Tonga, Vanuatu



ASIA & MIDDLE EAST

Afghanistan, Armenia, Azerbaijan, Bahrain, Bangladesh, Bhutan, British Indian Ocean Territory, Brunei, Darussalam, Cambodia, China, Christmas Island, Cocos (Keeling) Islands, Georgia, Hong Kong, India, Indonesia, Islamic Republic of Iran, Israel, Japan, Jordan, Kazakhstan, Democratic People's Republic of Korea, Republic Of Korea, Kuwait, Kyrgyzstan, Lao People's Democratic Republic, Lebanon, Macao, Malaysia, Maldives, Mongolia, Myanmar, Nepal, Oman, Pakistan, Philippines, Qatar, Saudi Arabia, Singapore, Sri Lanka, Syrian Arab Republic, Taiwan, Province of China, Thailand, Turkey, Turkmenistan, United Arab Emirates, Uzbekistan, Vietnam



NORTH AMERICA

Canada, Mexico, United States, **Caribbean:** Anguilla, Antigua and Barbuda, Aruba, Bahamas, Barbados, Bermuda, BES islands (Bonaire, St Eustastius, Saba), Cayman Islands, Cuba, Curacao, Dominican Republic, Grenada, Guadeloupe, Haiti, Jamaica, Martinique, Puerto Rico, Saint Kitts and Nevis, Saint Lucia, Sint Maarten (Dutch), St Vincent and Grenadines, Trinidad and Tobago, Turks and Caicos Islands, Virgin Islands (US), **Central America:** Belize, Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, Panama



SOUTH AMERICA

Argentina, Bolivia, Brazil, Chile, Colombia, Ecuador, Falkland Islands (Malvinas), French Guiana, Guyana, Paraguay, Peru, Suriname, Uruguay, Venezuela



The R&A group of companies was formed in 2004 to take on The Royal and Ancient Golf Club of St Andrews' responsibilities for governing the Rules of Golf, staging The Open, golf's original championship, and developing the sport. The British Golf Museum in St Andrews is part of The R&A Group.

Together The R&A and the USGA govern the sport of golf worldwide, operating in separate jurisdictions with a commitment to a single code for the Rules of Golf, Rules of Amateur Status and Equipment Standards. The R&A, through R&A Rules Ltd, governs the sport worldwide, outside of the United States and Mexico, on behalf of over 36 million golfers in 144 countries and with the consent of 158 organisations from amateur and professional golf.

The R&A has responsibility for running a series of world class amateur events and international matches in women's and girls' as well as men's and boys' golf. The R&A stages the AIG Women's Open and works with the European Tour to stage the Senior Open presented by Rolex.

The R&A is committed to investing £200 million over ten years in developing golf and supports the growth of the sport internationally, including the development and management of sustainable golf facilities. For more information, visit www.randa.org.



RandA.org
