

R&A

Developing Golf.

Sharing best practice for the benefit of the sport

ISSUE
eight



Golf in South Korea

We discover the combination
that is driving growth in South Korea

“ We are keen to work with Japanese golf stakeholders to devise plans to see even more people playing golf across all formats of the sport ”

– Phil Anderton

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About Developing Golf magazine

Developing Golf magazine is a key element of the golf development alliance we wish to create with affiliates globally to share best practice. This alliance also includes a new R&A Portal, increased funding support and consulting with affiliates on the ground across the year to develop the strongest activation plans, supported by R&A-created global assets.

Phil Anderton, Chief Development Officer – The R&A





Japan Golf Summit: Bringing a nation's golf industry together.

"It's a model that other countries may be able to follow"



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en & Girls



R&A R&A ジャパン ゴルフ サミット
R&A JAPAN GOLF SUMMIT





The Japan Golf Summit saw organisations from across the nation's golf industry gather to discuss the issues facing it.

Hosted by The R&A, the Summit involved a broad range of bodies and companies with a shared interest in the sport.



Dominic Wall, Director - Asia-Pacific at The R&A, outlines the potential impact of the event, which represents a significant step towards a unified strategic vision for golf in Japan.

What was the significance of the Summit?

It was an important Summit where The R&A brought the whole industry together for the first time in Japanese golf.

There has never been a forum like this where all the different bodies have come together to talk about some of the issues that are facing Japanese golf.

I think Japan in particular is a very strong country, because they have the manufacturers and they have such a big presence of golf across the country, but it's got to that level without a truly concerted and co-ordinated effort.

If we can do something with the Summit to encourage broader communication and

collaboration, it will grow even stronger and it's a model that other countries may be able to follow.

Which organisations were represented?

We had a tremendous uptake from the invitations that were extended and excellent participation in the Summit.

It was not only the Japan Golf Association, but the tours, the manufacturers, the promoters, the golf course companies that manage golf clubs, and more.

There were representatives from companies like Srixon, Mizuno, Bridgestone and TaylorMade, and the regional associations were also in attendance, such as the Kanto Golf Association and the Hokkaido Golf Association.

A number of other groups were represented there, including the High School Golf Association and the Golf Course Managers Association.

What themes and topics were addressed?

We carried out research into the Japanese golf industry with Sporting Insights and produced a report that looked at some of the issues it was facing. There were six key areas that arose from that, and co-operation between those bodies involved in golf in Japan was one of them.



Japan Golf Industry Report – key findings

15%

of golfers in R&A-affiliated markets are in Japan

21%

of 9&18-hole golfers in R&A-affiliated markets are in Japan

30%

growth in the number of 9&18-hole golfers in Japan since 2012

9.4M

adults and 3.6m juniors engaged in golf in Japan

27%

of the Japanese population has followed golf media in some shape or form in the last year

Grassroots golf was another, as there's never really been a national junior programme, like the ones you would see in Australia, England or Scotland.

The other aspects were women in golf, the use of technology in the sport, sustainable golf and environmental challenges, and golf and health.

We had a number of very interesting speakers, some from Japan and some from The R&A, and we received some tremendous feedback.

What follow-up actions will be taken?

Following the Summit, we've written to all the participants to inform them we're looking to set up a task force to look at two key areas: golf and health and women in golf.

That would involve having a group assembled from across the industry that The R&A would help drive towards finding solutions, getting more women playing golf, publicising and promoting the sport to an older demographic.

We've been doing a lot of work over the last 12 months with the Japan Sports Agency to articulate some of the benefits of golf to the ageing population in Japan, and those benefits are quite significant.

There has been a lot of interest from various bodies to be involved with this task force and our next challenge is to bring that together, building on the momentum of the Summit. ●



**Chief Development Officer
Phil Anderton on the Summit:**

"Japan is a very important country for the future growth of golf globally. As the number one ranked affiliate for numbers playing on-course golf, we are keen to work with Japanese golf stakeholders to devise plans to see even more people playing golf across all formats of the sport. The Summit was organised to achieve just this, and I was delighted to see so many people there, including from The R&A, the Japan Golf Association, private facilities, tours, manufacturers and media, all keen to play their part. I was especially pleased to welcome the Japan Sports Agency, who share our goal of improving health through golf. We look forward to continuing our collaboration, moving to a unified action plan to grow the sport further in Japan."

How screen golf and stars are driving South Korean participation

Golf participation numbers in South Korea are on the up both on and country's elite talent helping to inspire a nation



global th

off the course, with the



South Korea boasts a wealth of talent on golf's global stage, having produced several household names.

With men and women flourishing at the elite level, South Korea is also building a broad base of devotees to the sport across on-course and alternative formats.

The R&A's International Golf Barometer, produced in association with Sporting Insights, found that 73% of respondents saw Korea as having prominent national golfing stars.



Sang-Won Koh, Director – International Affairs and High-Performance at the Korea Golf Association, discusses the game's growing popularity in South Korea.

What factors have influenced South Korea's golfing success on the global stage?

Firstly, it's pleasing to know that we are considered a successful golf country – that is a source of pride for us.

There are several factors in that success, including the pioneers who helped to reshape the perception of golf in Korea.

The typical stereotypes of golf portrayed it as a 'gentleman's sport' or something that was purely for westerners, but that view was transformed by the impact of players like Se Ri Pak and KJ Choi on the LPGA and PGA tours.

As Koreans saw their success on TV, it helped to inspire a new generation of golfers in the country. It produced a 'can-do spirit' and changed the mindset of Koreans.

Since then, we have seen many more players come through to play at the highest level, such as Inbee Park, Na-Yeon Choi, So-yeon Ryu, Y.E. Yang and many more.



Team Korea at the recent concluded Asian Games

Their success yielded the first golf boom in Korea, with more people playing the sport, and the industry as a whole growing due to the demand for equipment, clothing, courses, facilities and coaching.

This created more jobs in the golf industry and also benefited professional golfers, with increased investment from sponsorship, broadcasting, and the introduction of more tournaments in Korea, helping to nurture talent across the country.

Now, it is not just young players but also their parents who see golf as an avenue to pursue, which is leading to a growing number of players at all levels.

Why is golf popular in South Korea?

People in Korea appreciate that golf is a sport that can bring many positive health and lifestyle benefits.

It is a sport you can continue to play into old age and there are positive impacts associated with being active, whether outside on a course or using indoor facilities. Furthermore, golf is usually a social activity, bringing people together in an enjoyable environment.

There is an extent to which golf is perceived as demonstrating a certain level of social status, as there is an expense associated with playing the sport. Just by playing golf, it can suggest a certain level of wealth. With that in mind, it's also true to say that golf can provide lots of business opportunities because of the social status of some of those people who like to play.

How have indoor and screen golf helped promote and grow the sport?

The chance to play off-course and alternative formats allows players to negate some of the challenges that may prevent them from playing



Golf in South Korea

8m
Adult players

2.8m
Junior players

1.8m
On-course only

1.1m
Alternative format only



Asian Games Team Gold: SungJae Im,
Yubin Jang, Wooyoung Cho, Siwoo Kim

“As Koreans saw our players’ success on TV, it helped to inspire a new generation of golfers in the country. It produced a ‘can-do spirit’ and changed the mindset of Koreans”

on-course golf.

Those challenges include time and cost, with indoor and screen golf reducing the impact on both fronts.

Korean people are generally very busy, and we love convenience, and this is especially true among the younger generation.

It’s possible to play screen golf and have a meal and a drink at the same time, and this comes at an affordable cost at a facility that is perhaps only a ten-minute walk away.

Furthermore, they can manage their time by choosing how many holes they want to play, so they do not have to commit to a whole round of 18 holes, which is more time-consuming.

What is the screen golf culture in South Korea?

It is a varied scene that incorporates all types of people, including those who might be considered

‘non-golfers’. For that group, screen golf is just one of a number of e-sports games and it’s something they would do for fun, with little or no intention of playing the game more regularly or in any other setting.

Golf beginners are also drawn to the scene as it affords them an opportunity to play and practice in a more relaxed and easy-to-access environment.

They know that they will have the opportunity to transfer that interest in and skill for golf to a proper course once they have the time or can justify the cost.

Experienced golfers also use screen golf facilities to hone their skills, and they too may have instances where it is more time-efficient to play screen golf.

Of course, indoor facilities come in handy when the weather is not so good. ●

5.1m

Both on-course and alternative formats

16%

Played on a golf course in 2022

6%

Played an alternative format in 2022

27%

Non-golfers who are interested in playing in the future

Golfzon is central to screen golf's popularity.

After more than 20 years in the business, Golfzon is an integral part of South Korea's golfing landscape, explains Global Business Director Min Kyu Kim



“Golfzon has played a significant role in transforming golf into a popular sport for all ages and genders”



Case Study

What is Golfzon?

In May 2000, Golfzon started as a small venture company and introduced a screen golf simulator to the world based on its own sophisticated IT technology.

Combining golf, IT and culture, Golfzon has developed innovative golf simulators, creating a novel industry ecosystem to generate a new sports culture and numerous jobs. Golfzon has played a significant role in transforming golf into a popular sport for all ages and genders.

Why has it been so successful?

Golfzon's success can be attributed to its excellent simulators and network technology. It entered the market with a differentiated service model based on networking.

Through comprehensive research and technological investments, Golfzon have improved the screen golf environment to provide golfers with the necessary tools to improve their skills and enjoy the experience.

With 4.76m members who enjoy and experience Golfzon's various platforms, it has established a world-class reputation in the golf industry.

What are your future plans?

To expand our global business and enable customers around the world to experience screen golf and Golfzon's comprehensive service, we've established overseas corporations in Japan, China, Vietnam, and other countries, and have entered 64 countries worldwide.

They are making efforts to expand their business by establishing partnerships with local companies and expanding their local presence in accordance with their global strategy of 'glocalisation'.

What has the overall growth of golf been in Korea, particularly in the simulator space?

According to the 2022 Golf Industry White Paper published by the Korea Golf Foundation, the size of the Korean golf market last year was over £120m.

During the period of the Covid-19 pandemic from 2020 to 2022, the Korean golf market showed a steep growth curve, with an average growth rate of 16.2% compared to the pre-pandemic five-year average growth rate of 4.9%.

In 2022, the transitional year of the pandemic, the number of on-course golfers remained similar to the previous year, but the number of





Golfzon in South Korea

6,317

Golfzon screen golf facilities...

2,476

...of which are Golfzon Park stores

65m

Golfzon rounds played in 2020

100m

Expected rounds in 2023

rounds in screen golf continued to increase.

Despite the external shock of Covid, the indoor screen golf market has consistently grown. It seems that the pent-up demand in the on-course golf market after the end of the pandemic is flowing into the screen golf market.

Does Golfzon try to help players transition from indoor golf to on-course golf?

Yes, to a large extent. Though there is no current cumulative data to justify so, both on-course and off-course markets are growing healthily together and expanding overall market share.

Golfzon's golf simulator offers approximately 354 courses, including the Old Course at St Andrews, both domestically and internationally. On-course golfers can use Golfzon's screen golf to play a preview round and receive various analytic data regarding their rounds.

Additionally, the powerful Golfzon Driving Range system allows golfers of all levels, from beginners to professionals, to receive golf lessons and improve their skills through practice.

It would not be an exaggeration to say that using Golfzon's system, from lessons and training to previewing golf courses before playing rounds, has become a trend in the golf market.

It is not about competing with on-course golf but creating the opportunities together to expand the overall golf market.

Tell us about the promotion of golf and health with The R&A

It's a great pleasure to be running golf and health promotion with The R&A. Our goal is to actively promote a healthy lifestyle through golf both domestically and internationally.

Golf simulators at Golfzon serve as effective



advertising platforms themselves. During the waiting time between holes in an 18-hole round, there is typically a gap of about 15 seconds which can be utilised for targeted advertising towards golfers.

About 330,000 rounds are conducted on a daily average, so the exposure effect is expected to be substantial.

Additionally, it seems that campaigns can be exposed through the Golfzon app as well. The Golfzon app is the number one sports app in terms of downloads, with approximately 1.56 million active members on a monthly average.

The plan is to make the maximum number of people become aware of the golf and health campaign and help them understand the benefits of golf so that they can play more frequently and also attract more people into the sport. ●

What is the GTOUR?

GTOUR is the world's first premier screen golf tour. It was launched in 2012 and is now in its 11th year. In 2013, with a total prize money of 400 million won, Golfzon recruited various professional players and currently has close to 3,000 members.

In 2020, the total prize money exceeded 10 billion won, and the current prize money of GTOUR has grown to 1.4 billion won, with 1.2 billion won for the regular tournament and 1.5 billion won for the invitational.

It holds around 20 tournaments each year, and many players active in domestic field tours such as KPGA and KLPGA participate. Players such as Im Sung-jae, Kim Si-woo, and Lee Kyung-hoon, who are active in the PGA, as well as top players like Ko Jin-young, Park In-bee, Lydia Ko, Nelly Korda, and Jessica Korda from the LPGA, have participated in various competitions with Golfzon GTOUR.

Investing in homegrown coaches.

Since employing its first native National Team Coach, the Bulgarian Golf Association has achieved unprecedented results from its junior players



Nineteen years ago, **Seth Underwood**, and his friend Krassimir Guergov, opened the first golf course in Bulgaria. Now, as Secretary

General and President of the Bulgarian Golf Association respectively, they have turned their focus to the development of their junior golfers and, with the help of The R&A, have invested in Bulgarian PGA Professional **Stanko Marinov**, who took on the role of National Team Coach three years ago.

How has a homegrown National Team Coach helped junior development?

Stanko Marinov: When I started to work with the Association in 2016, there were ten or 11 juniors. My job was to start the Junior Programme to find and develop new juniors. From that point, the number of juniors began to grow, the level of the players went up, handicaps went down.

We now have up to 35 juniors practising seriously, and, in total, we have around 60, not including the beginners. The kids realise how great golf is and what opportunities it gives – especially for scholarships in the United States.

SU: The results over the last three or four years, for such a small country, have been fantastic. The funding from The R&A has really gone towards supporting Stanko's salary. Quite honestly, without their support, we wouldn't have achieved those results.

What does the Junior Programme involve?

SM: Kids can come to practise at St Sofia Golf Club for free. We give them different exercises to do – chipping, putting, a game. And we give them goals, playing from different tees on the golf course, playing for different points, playing with three clubs or five clubs.

We've also started to work with a sports psychologist, and we have a physio and a lady who is responsible for recovery.

How do you encourage beginners to come to a session?

SM: For the beginners, it's fun. We play different games, so they can have fun and enjoy the time with the rest of the group. Sometimes we organise mixed teams with a good player and a beginner playing against another good player and a beginner.



Stanko's Story

When I finished school, I worked as a geodesist (geodesists measure and monitor the Earth to determine the exact coordinates of any point) in a building company and the owner created his own driving range. One day, he asked me to go and try golf, so I went, and the Professional showed me how to hold the club, how to grip, what to do with my posture, and I fell in love with the game. The pro asked my boss if I could go and work for him because he saw some talent and potential; from that point on, I was in golf. In our country it's quite a new sport and I saw an opportunity to develop and improve myself, to be one of the first Bulgarian coaches for the future. I went on to study golf at the National Sports Academy and was Assistant Coach at the golf courses near the Black Sea. I joined the Association in 2016 and worked with a couple of National Team Coaches – Scott Goldie was my mentor through my PGA training programme – before I became the National Coach.

Absolutely everyone is welcome. And we find when a junior is happy after a session, they share with their friends, and they bring their friends to try it too.

I believe if practice sessions are fun, and they really love it, they come back to get more experience in golf.

SU: We've been getting them to come to the golf course and to the driving range because we think that's the best way of trying to create the interest – for the ones coming for the first time, they see the other kids playing, and Stanko tries to make it fun, chipping and putting in a relaxed way, with no pressure.

How important is it to develop homegrown coaches?

SM: I think it's probably more valuable when you're a local guy and giving the new information to the juniors in our language because, while most of the kids know English, they're not very experienced in the language. So they will understand more quickly if you speak to them in Bulgarian.

Our country is very new in this sport, we are trying to create some traditions, and I think it's much better to have Bulgarian coaches.

What successes have you achieved since Stanko became National Team coach?

SM: When I started, there was only one girl who had won a tournament outside our country, and then the first Bulgarian boy won the Hungarian Open in 2017 and won points for the World Amateur Golf Ranking® (WAGR®).

Since then, we have 17 boys in the WAGR® and five girls. I'm very proud, it's a huge privilege to be part of this process and these achievements.

SU: In the last three years, we have six boys and girls that have gone to university in the US – two on a full scholarship – and this season, our best player has already been accepted into Kansas University on a full scholarship, and he doesn't graduate until next May.

For such a small country, that's incredible and something we're really proud of.

2001

The Bulgarian Golf Association established

2004

First golf course opened in Bulgaria

SIX

golf courses in Bulgaria

1,000

golfers in Bulgaria





National Team performance 2022

- Four new entries in the WAGR®
- Top-three finish in the Ladies' and the Men's European Team Shield Championship
- Participated in the European Golf Association Boys Division 2
- One player made the cut in both the European Men's Amateur Championship and the European Ladies' Amateur Championship
- Participated in the World Amateur Team Championships with two teams
- Participated in the following international championships: Hungarian Junior, Serbian Amateur, Romanian Amateur and North Macedonian Amateur
- Continued improvement on Player Performance Statistics against 2021
- Continuation of the Junior Match Play Series started in 2021

Are you looking to take on more homegrown coaches?

SU: This summer, we took on Damyan Gulev to help Stanko. He has started his PGA training and is working with the feeder level players – where we start to identify the potential players that will replace those that are graduating and going off to university. When Damyan graduates, we'll then have two qualified coaches, and maybe at that stage, then we can look at developing it further.

SM: I'd really like to motivate another one of the guys from the National Team, who are thinking about coaching, to start the PGA training programme, with the view to taking on the National Team Coach role in the future.

What are your plans for the future?

SM: We haven't seen a Bulgarian player playing on the tour, but we're hoping to.

My dream is to keep working with the good guys with potential for reaching some of the tours in Europe or the States – to keep practising with them, to keep teaching them and to learn from them as well.

SU: Our focus really has got to be on getting the best out of our National Team, continuing to develop that feeder programme, and really show that, for a small country, what results we can achieve in European Golf Association events, and with the players that are going on to study in the US.

Also, with the help of The R&A, we have created a ladies' golf club, with a whole programme of events and around 43 members, which is fantastic, so that's something that we really want to support and try to develop. ●



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