

R&A

Developing Golf.

Sharing best practice for the benefit of the sport

VOL 4, ISSUE
Three



Opening golf to the world

Our new global strategy aims to boost participation while showcasing the game's transformational impact

“The R&A's purpose is bringing golf to the world. That means getting more people playing and engaging in whatever format of the sport they find most appealing”

– Mark Darbon, Chief Executive of The R&A

VOL 4, ISSUE

Three

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About Developing Golf magazine

Developing Golf magazine is a key element of the golf development alliance we are creating 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.



Opening golf to the world.

The R&A's new global strategy aims to get more people playing while showcasing golf's transformational impact

Bringing golf to millions more people around the world is the aim of a five-year global strategy unveiled by The R&A.

Based on The R&A's purpose of 'opening golf to the world', the strategy will drive more people to play the game and engage with the sport, while showcasing golf's transformational impact on individuals and communities.

It will highlight its health, wellbeing and social aspects while ensuring the opportunity to play golf remains relevant and accessible at every level.

Under three key themes, the strategy will **Unite** through governance of the sport, **Inspire** through outstanding championships, and **Lead** by shaping golf's future with partners.

Over the next five years, The R&A aims to attract 22 million additional golfers, while creating more than £25 billion in social value through the sport.

Working with partners, it will also look to generate more than £1.5 billion in economic benefit through championships, establish more than 200 strategic partnerships, and generate more than five billion fan interactions through live attendance, broadcast and digital engagement around The Open, the AIG Women's Open and elite amateur championships.

"The R&A's purpose is opening golf to the world," said Mark Darbon, Chief Executive of The R&A. "That means getting more people, playing and engaging in whatever format of the sport they find most appealing.

"We know that golf offers many physical and mental health benefits and is a wonderful way of socialising and bringing communities together.

"That's why we are setting out to UNITE, INSPIRE and LEAD the sport wherever and however it is played."

Under the **Unite** theme, The R&A will strengthen the sport's foundations through governance and collaboration.

This includes ensuring the Rules of Golf remain adaptable and well understood, supporting a World Handicap System™ that enables fair competition across all abilities, maintaining equipment regulations that balance innovation and skill and delivering trusted world ranking systems.

The R&A will also provide leadership across new and alternative formats which are attracting millions of participants – including indoor simulator golf, adventure golf and driving ranges.



“The strategy will drive more people to play the game and engage with the sport”

The strategy states: "Governance of the sport is what unites golf and golfers. We must look long-term and do what is right for the future of golf.

"Whilst respecting the core values and traditions of the sport, we will proactively refine our governance approach to ensure it is appropriate for the modern world, flexible enough to reflect changing stakeholder landscapes, and to promote golf as a sport for everyone."

The R&A's championships will be used as a platform to broaden golf's appeal through the **Inspire** theme – growing audiences and generating long-term reinvestment.

The Open will continue to evolve as one of the world's leading sporting events, expanding its reach and engagement globally, while the AIG Women's Open will be further enhanced as a premier event in women's sport.

The wider championships portfolio will be optimised, while new formats will be developed to connect with emerging audiences.

The strategy says: "Our championships

Over the next five years, The R&A will aim to:

Attract
22 million
more people to play golf

Achieve
5 billion
interactions with golf through championships

Create
£25 billion
social value through golf

Generate
£15 billion
worth of economic benefit through championships

Have
200+
partnerships in place, collectively investing in the sport of golf

The R&A's new five-year strategy will:

Unite through governance of the sport

Inspire through outstanding championships

Lead by reshaping golf's future with partners

provide an unrivalled shop window to inspire golfers of all abilities, all around the world, and drive transformational levels of interest and excitement in the sport.

"We will maximise the moments that our professional and amateur championships provide to elevate and grow the sport, whilst also strengthening the perception and understanding of the role The R&A plays on the global stage.

"In an ever-changing and highly competitive market, our approach and offer must evolve. That means balancing tradition with innovation and recognising, specifically, that our professional championships fund our broader investments in the sport."

The **Lead** theme will centre on collaboratively working with national federations and golf stakeholders across the globe to open the sport to new and under-represented audiences – particularly women and juniors.

It will champion environmental sustainability across golf and strengthen support for high performance pathways in developing territories.

It will also use technology and world class insight to support federations, improve the golfer experience, and advocate for golf’s social and economic value. Ultimately, the strategy will allow The R&A to increase its investment into the game.

“Given golf’s proven positive impact on individuals and communities, we endeavour to grow the sport on a global basis and ensure its long-term sustainability,” the strategy states.

“Critically, we cannot do this alone. We will establish a partnership-led model that develops long-term relationships with national federations and the wider golf network and provides tailored, demand-led support.

“We will focus our time, expertise and investment in areas where we can add unique value and create systemic and scalable impact.”

The strategy has been introduced against the backdrop of continued participation growth. The latest numbers show that 112.2 million adults and juniors are playing golf in all its forms worldwide outside of the USA and Mexico. That’s

an increase of 4.2 million golfers year-on-year. Darbon added, “Golf is in a strong position and these new figures show that participation continues to boom around the world, especially among younger audiences.

“Our task now is to convert this momentum into long-term growth by reaching more people, creating greater impact and ensuring golf continues to grow in every part of the world.

“This strategy is about building on that momentum. Given The R&A’s purpose to open golf to the world, it sets out how we will enhance the sport in a way that is ambitious and measurable by increasing participation, expanding the reach and impact of our championships and demonstrating more clearly the social and economic value golf brings to communities worldwide.

“We have a responsibility to uphold the values and traditions that make golf special, while ensuring the sport continues to evolve and connect with modern audiences.”

“Ultimately the strategy will allow The R&A to increase its investment into the game”



UNITE
Strategic priorities

1. Adaptable, dynamic and well-understood Rules of Golf that ensure golf is played fairly and consistently worldwide.

2. Universal handicap system that makes golf a truly unique sport where all abilities can fairly compete against each other.

3. Forward-looking equipment rules which recognise innovation, while maintaining the appropriate balance of playing skill and technology.

4. Efficient, consistent and accurate golf ranking systems.

5. Proactive leadership in governance of new and alternative formats.

INSPIRE

Strategic priorities

1.

Innovate and invest to ensure The Open remains one of the world's greatest sporting events, maximising global reach, reputation and long-term profitability.

2.

Drive global audience growth for the AIG Women's Open, establishing it as a leading event in the women's sports landscape and, in doing so, elevating women's golf worldwide.

3.

Optimise other championships for impact.

4.

Create bold, new championships in new and alternative formats of golf.

Key focus areas that will allow the strategy to succeed and deliver real impact are:

- Commercial growth & diversification – seeking opportunities to enhance profitability while recognising The R&A's broad role in the sport.
- Brand & storytelling – telling the unique story of The R&A and what it does to the audiences that matter.
- Technology & data – proactively investing in modern technologies and solutions to unlock value for partners and golfers.
- Value creating relationships – strong, collaborative relationships will amplify impacts in local markets around the world, while strengthening reach, reputation and relevance.
- People & organisation – brilliant people and a high-performance culture are essential to deliver on a broad and impactful strategy

Darbon said, "Now is the time to be bold and ambitious and really get after the huge opportunities we have in front of us to transform golf.

"Just imagine how far we can go if we truly embrace new formats and technologies and elevate the entire experience of engaging with the sport! "If we combine the expertise and energy of The R&A with that of our extensive network of partners the possibilities are almost endless.

"I firmly believe in our collective power to drive change and accelerate the impact that this fantastic sport can have on individuals and the communities all around the world." ●



LEAD

Strategic priorities

1.

Opening golf to new audiences and under-represented groups, particularly women and juniors.

2.

Sustainable golf best practice and advice to ensure an environmentally sustainable future for golf courses.

3.

Providing expertise around high performance, especially for developing territories.

4.

Leading advocacy of the benefits of golf built on world class research and insight.

5.

Identifying and deploying technologies to support federations and enhance the golfer experience.

RESEARCH.

Junior golf growth drives continued boom.

The numbers from the 2025 R&A Global Participation Report show the sport continues to have strong appeal

Junior golfers are helping to drive golf's participation boom around the world.

New participation figures published in the 2025 R&A Global Participation Report shows 112.2 million adults and juniors are playing golf in all its forms worldwide outside of the USA and Mexico – an increase of 4.2 million golfers year-on-year.

The research reveals that 65 million adults are playing golf – up one million on 2024 – while 47.1 million juniors are participating in the sport. That's an increase of 3.2 million over 2024 and highlights the importance of younger players in shaping the sport's long-term future.

Shorter formats are also increasing in

prominence, with 68.3 million adults and juniors playing a range of different forms of the game.

And the number of registered golfers – those who are a member of a golf club or are affiliated to their national federation through a direct subscription – is also on the rise. Increasing from 8.4 to 8.7 million between 2024 and 2025, there has been a 16% growth since 2020.

Asia is the leading continent for adults playing golf among R&A affiliated regions, with participation of 26.2 million. Europe has 20.6 million adults, with Canada hosting 7.1 million players.

Europe is the region with the highest junior participation (19.9 million golfers).

16%

Rise in registered golfers since 2020

112M
Adults and juniors playing golf
(outside USA and Mexico)

43.9M
Total golfers who have played
on a 9- or 18-hole course

47.1M
Juniors playing golf
(up 6% since 2024)

8.7M
Registered golfers in The
R&A's jurisdiction

65M
Adults playing golf
(up 1% since 2024)

18,500
Golf courses in The R&A
affiliated nations worldwide

INSIGHT.

“Our task is to convert this momentum into long-term growth”

Mark Darbon, Chief Executive of The R&A, says the next step is ensuring golf continues to grow all over the globe

The surge in popularity golf has enjoyed and continues to sustain is testament to the endeavours of so many involved in the sport. This simply doesn't happen without the great work of national federations and other industry partners, and I would particularly like to thank them for their hard work and partnership as we collectively grow the game.

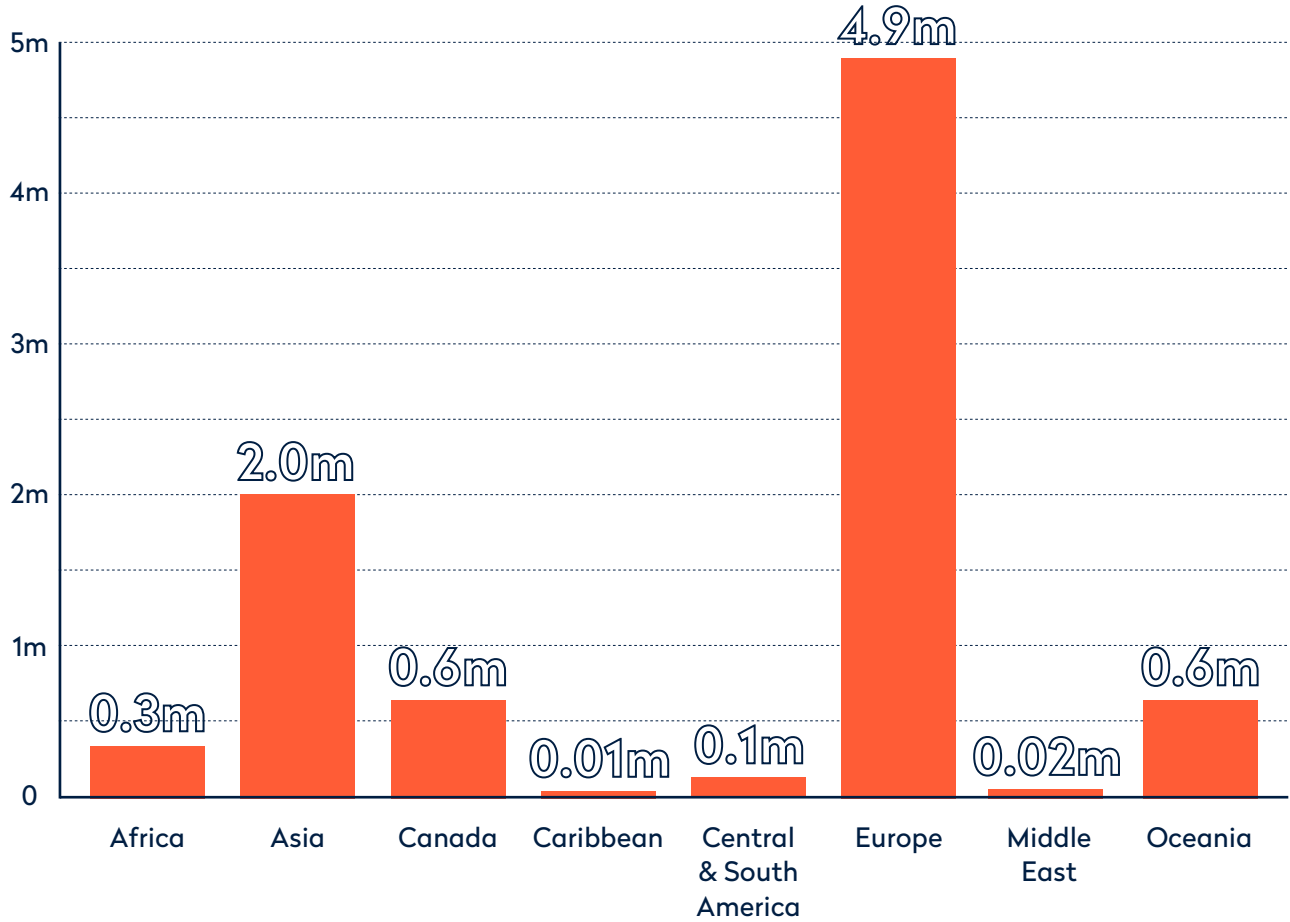
Golf is in a strong position as a sport and these new figures show that participation continues to increase around the world, especially among younger audiences. Through our new strategy, our task is to convert this momentum into long-term growth by reaching more people, creating greater impact and ensuring golf continues to grow in every part of the world.

Sustained growth can be achieved by combining our global golf development activities, insights and data with the local knowledge and expertise of national federations and through collaboration with the wider golf industry.

New golfer participation programmes with appealing propositions and promotions are important for encouraging more people into golf and retaining them in greater numbers.

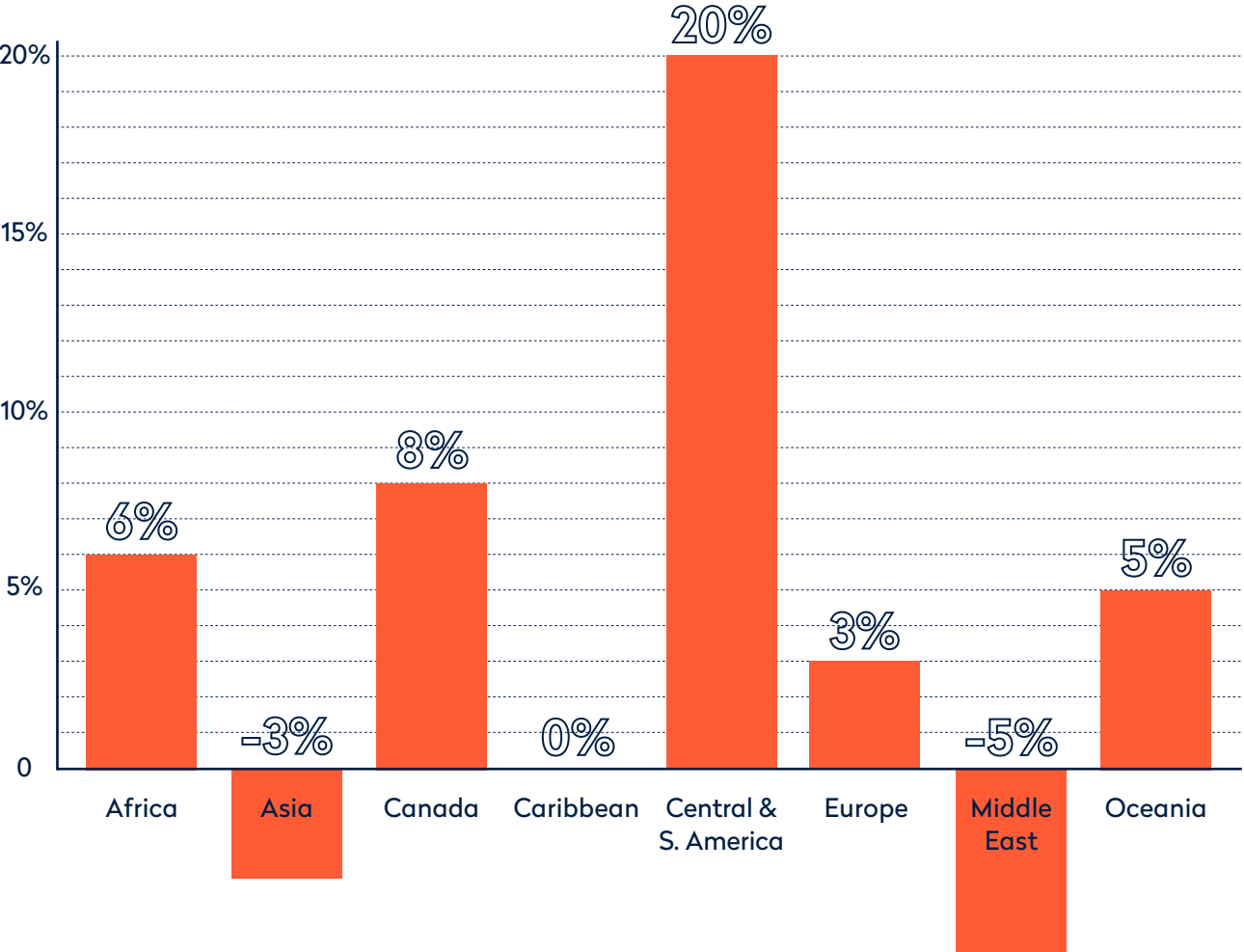
Data source:
2025 R&A Global
Participation
Report

Registered golfers



Registered golfer increase

2025 vs 2024



INSIGHT.

“Alternative formats remain a key driver of expansion”

Sporting Insights, who partnered with The R&A on the report, says while participation remains on the rise the figures are more nuanced

This year’s findings underline a continued growth story, with more than 112 million people now playing golf across R&A affiliated markets.

While overall participation has increased again, the composition of that growth is becoming more nuanced.

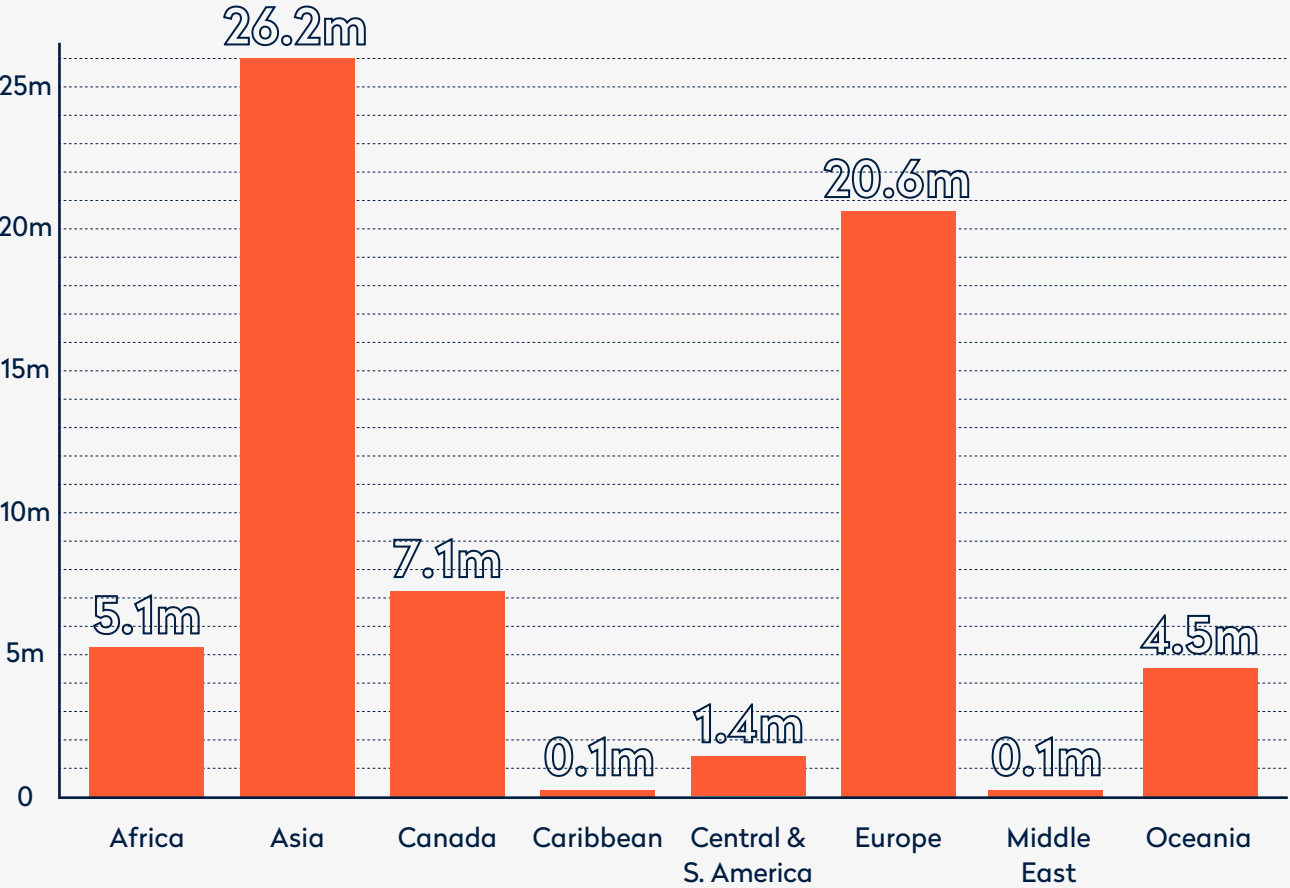
Adult participation has risen modestly, while junior engagement has accelerated more strongly, underlining the importance of younger audiences in shaping the sport’s long-term future.

Across formats, the data points to a maturing participation landscape. Traditional 9- and 18-hole golf continues to grow, albeit at a steadier

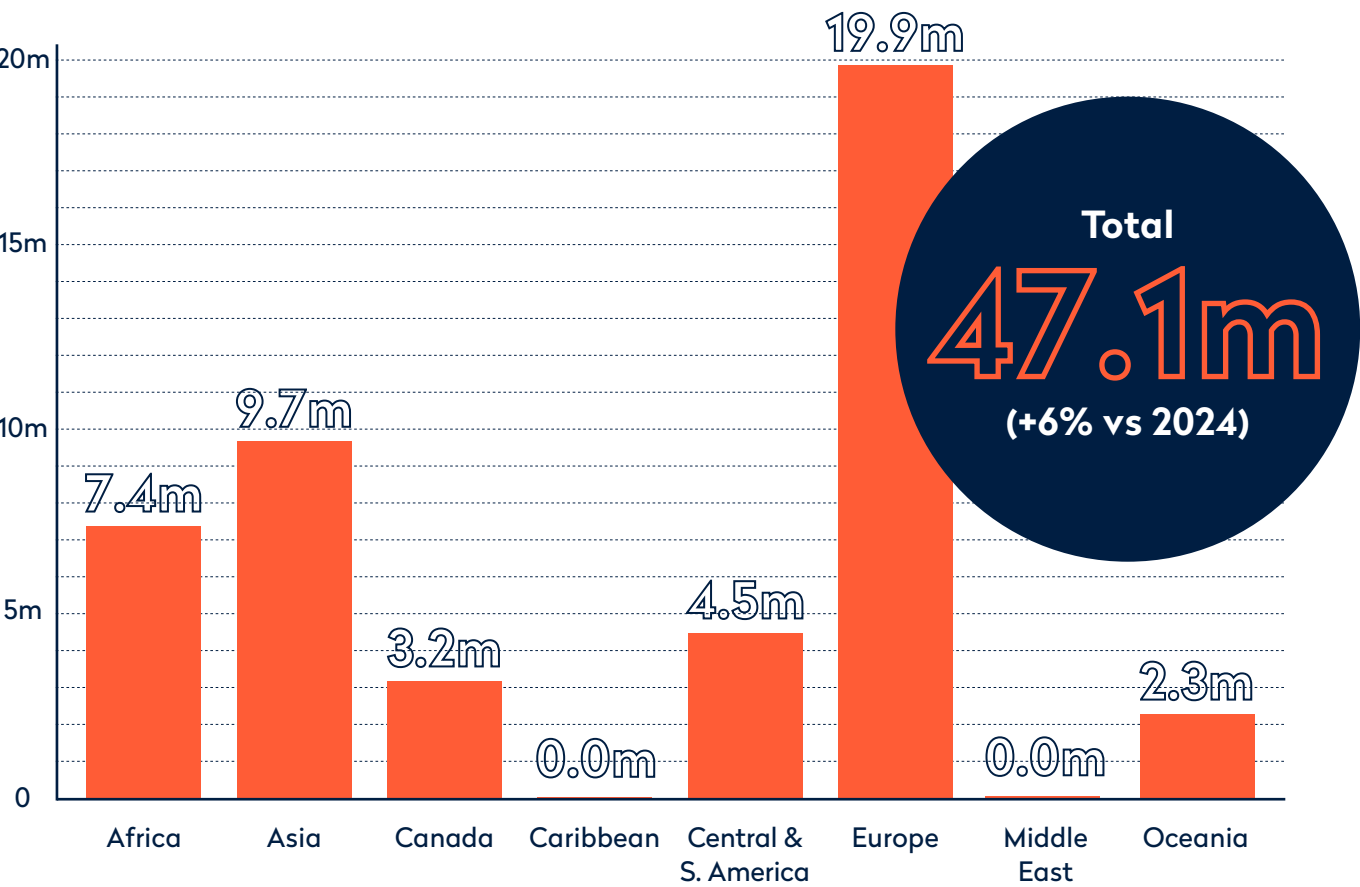
pace, while alternative formats remain a key driver of expansion. Shorter formats, driving range activity and simulator-based experiences are not only attracting new participants, but are also playing a vital role in keeping the sport relevant in a more time-constrained and experience-led environment.

At a regional level, growth patterns are becoming more differentiated. Established markets in Europe continue to provide a strong foundation, while emerging regions are contributing in distinct ways, including notable gains in registered participation in parts of Central and South America.

Total adult participation



Total junior participation



About the process

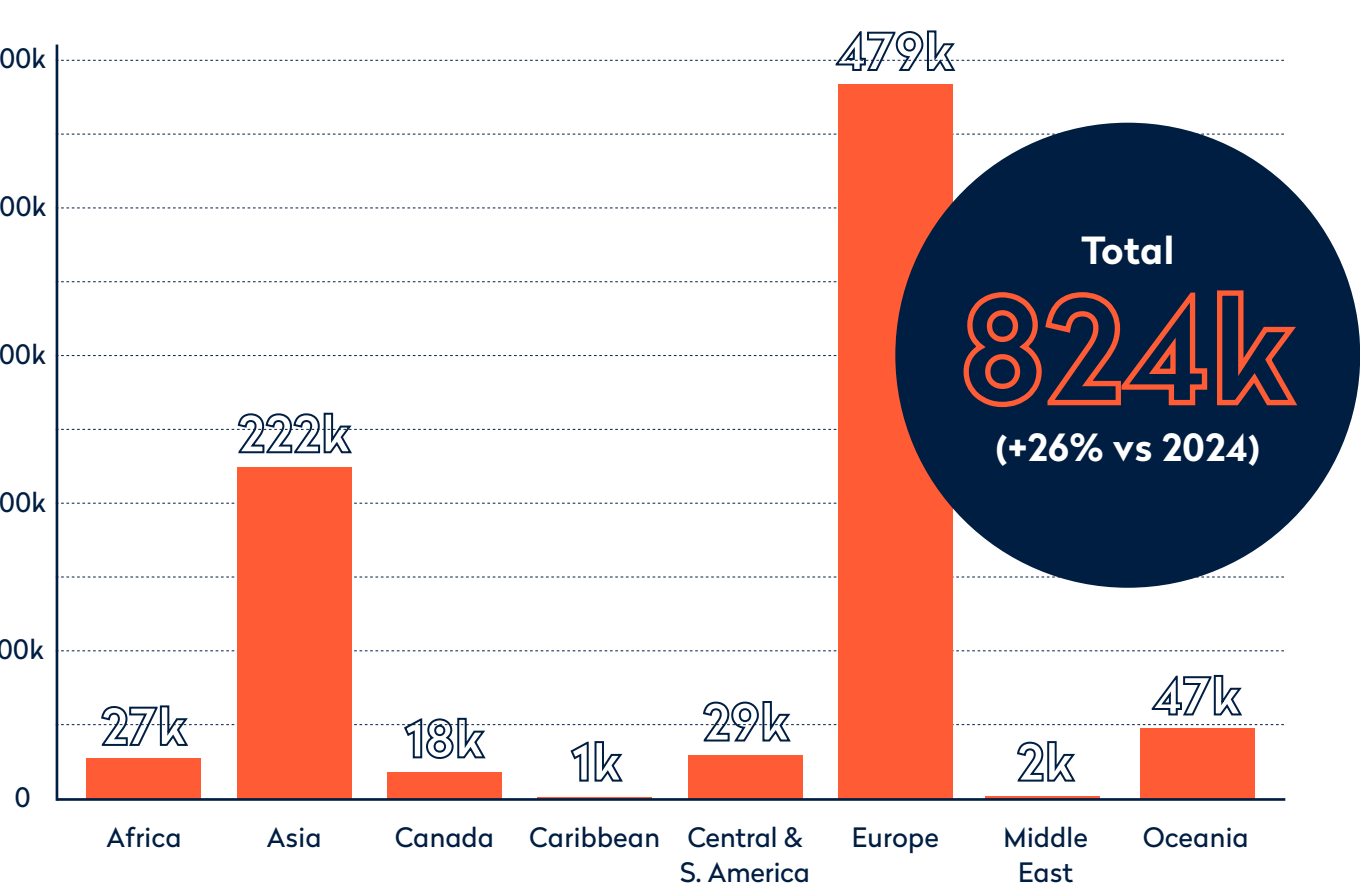
The report draws on a range of data sources, including direct input from national golf associations/ federations and insights from The R&A Golf Barometer – a statistically robust tracking study introduced in 2022.

Information is fed in to the global participation extrapolation model, which is used to calculate the number of golfers around the world.

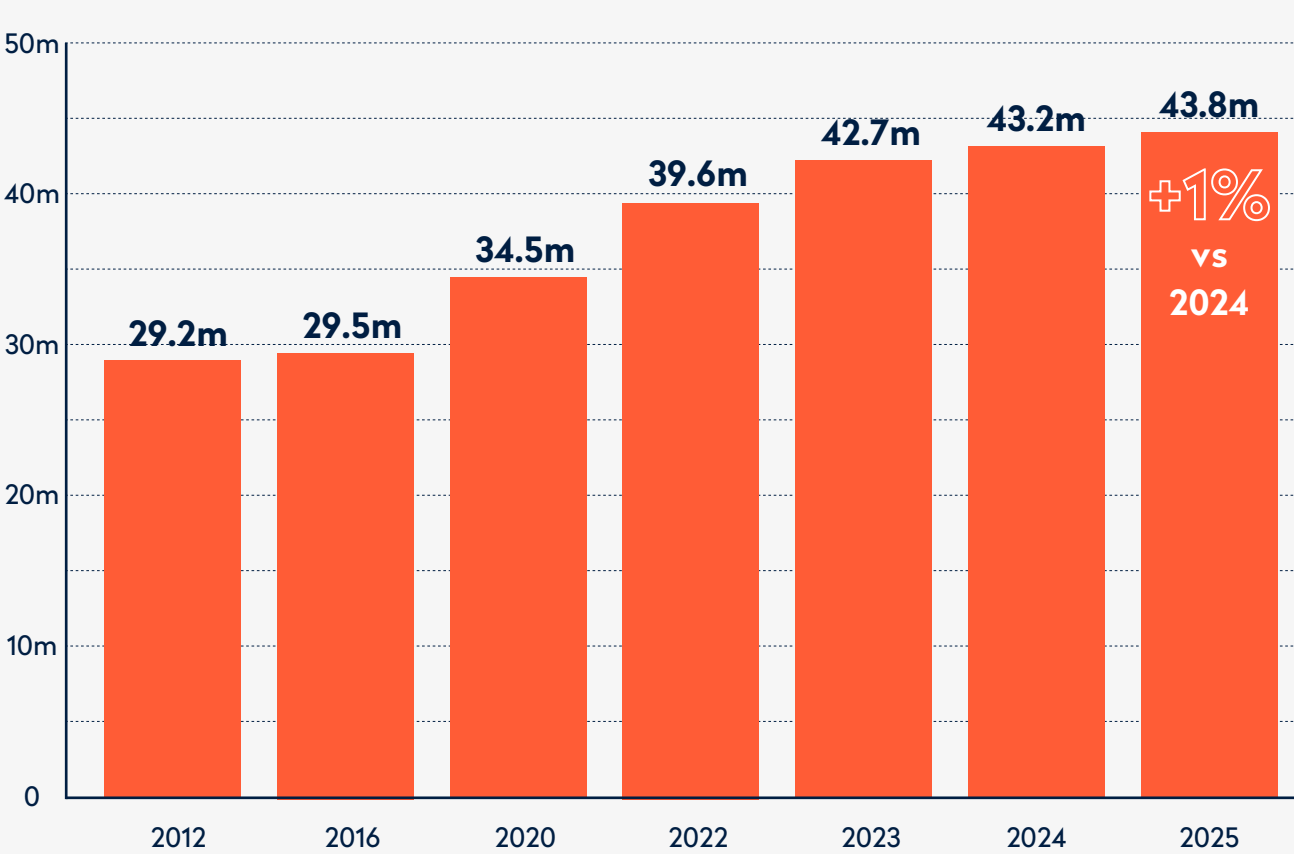
National golf associations/ federations share their data through a survey distributed by The R&A to its affiliates globally, or through access granted by the European Golf Association (EGA) to its national federations member data portal.

For the 2025 report, input was received from 110 national golf associations/federations in The R&A's jurisdiction around the world.

Registered junior golfers



The rise in global 9- and 18-hole golfers



WOMEN'S REPRESENTATION.



All 9 & 18 hole
adult golfers

28%

women
(up from 25%)



Other format
adult golfers

53%

women
(up from 50%)



Total adult
participation

34%

women
(up from 31%)

In The R&A's nine
biggest markets for
adult participation

% of female adult participants



The R&A Golf Barometer markets – 9- and 18-hole golfers (millions)

Market	2012	2016	2020	2022	2023	2024	2025	Change 2024-25
Argentina	0.1	0.1	0.1	0.2	0.2	0.2	0.2	3%
Australia	1.1	1.2	0.9	1.9	1.9	2.3	2.4	4%
Canada	5.9	5.7	5.7	5.6	5.9	5.7	5.8	2%
France	0.5	0.6	0.8	1.5	1.9	1.7	1.6	-6%
Great Britain & Ireland	3.8	3.6	5.8	5.6	5.6	5.8	6.1	5%
Germany	0.7	1.1	1.2	2.1	1.9	2.3	2.3	1%
Japan	6.3	6.9	6.1	8.1	10.5	10.8	10.9	1%
Republic of Korea	4.0	4.1	5.3	5.4	7.7	7.0	7.0	0%
South Africa	0.4	0.4	0.4	0.5	0.5	0.5	0.5	5%
Total - Barometer markets	22.8	23.6	26.2	30.8	35.9	36.2	36.8	2%
Global* total	29.2	29.6	34.5	39.6	42.7	43.3	43.9	1%
Barometer market as a % of Global* participation	78%	80%	76%	78%	84%	84%	84%	=



About The R&A Golf Barometer

The R&A Golf Barometer is a tracking survey which uses nationally representative samples of adults in core golfing markets.

The composition of the sample represents the composition of the population as defined by the national census in each market as much as possible.

The core markets included in the Barometer since its launch in 2022 are: Argentina, Australia, Canada, France, Germany, Great Britain & Ireland, Japan, South Africa and South Korea.

Each quarterly wave of fieldwork gathers feedback from 1,250 adults in each of these markets, leading to a total annual sample of 5,000 per market.

“It’s amazing how much progress has been made over the last decade to evidence the positive impact golf can have on people’s lives.”

Those words, from Mark Darbon, Chief Executive of The R&A, are not an understatement. From the revelation that golfers live five years longer than non-golfers on average, to the transformative effect the game can have on social wellbeing, golf is a health-enhancing activity for people of all ages, abilities and backgrounds.

Following the publication of The R&A’s first golf and health report (2016–2020) in October 2020, a new edition has been released to further educate golfers, non-golfers, national federations and policy makers on the physical, social and mental benefits of the sport.

The report summarises the scientific research with ten case studies highlighting the impact of collective endeavours and providing key learnings from work across the world.

The aim is to drive awareness of the sport’s benefits. The R&A has played a key role in funding research by Dr Andrew Murray, of the University of Edinburgh, who advises the golf industry and governments.

Here, he discusses the new report and explains the key role affiliates can play in spreading the golf and health message.

What was the impetus behind the updated report?

We know golf has stood the test of time. We know it can help people of all ages. What we now have is far more evidence that golfers can live five years longer than those who don’t play, and that it’s got powerful physical health benefits and mental health benefits, as well as social connection and economic benefits.

With the case studies, we wanted to see how this applied in person. What are the benefits for kids? What are the benefits for adults? What can affiliates do to promote and grow the game in their country or jurisdiction?

People are open to golf in different ways, whether that’s simulators, 9 holes, playing padel at the local golf course, or 18 holes. Golf is recognising the health benefits. Facilities and affiliates are more open to really opening golf out and the public are responding.

Do some of the benefits you’re finding still surprise you? The numbers from the strength and conditioning case study, for example, were eye-opening...

Golf and Health.

We know the benefits golf can have for physical and mental health – now it’s about spreading that message as wide as possible



Dr Andrew Murray is a sports and exercise medicine consultant at the University of Edinburgh. His PhD assessing the health benefits linked to playing golf formed the scientific basis for The R&A’s policies and initiatives around golf and health. The Chief Medical and Scientific Officer for the DP World Tour and Ladies’ European Tour, Dr Murray has worked at the Olympic Games, Paralympics, Commonwealth Games, as well as The Open, Ryder Cup, and the Tour de France.

I am surprised, even when you intuitively know something to be the case. I'm a general practitioner. I knew getting folk out, walking in green space and making a social connection was likely to be good for health, but now we've got the science to back that up for golf and more people are recognising that.

Five or ten years ago, very few people were being prescribed walking or golf.

People are realising that green space, social connections, getting out and about, and not sitting on the couch for the four or five hours you're out on the golf course has these benefits.

I'm just pleased the evidence is accruing so we can convince policymakers, medical colleagues, and golf facilities of the opportunity to market this. Golf courses are beautiful and they can be challenging. You can have fun. But we can now convincingly add health benefits to the list of marketing assets.

The report clearly shows the vital role affiliates have to play in spreading the message...

There are some brilliant examples of affiliates really putting the ball on the tee and smacking it down the fairway. I think the Wales Golf example was really nice. Of course, that's led to more people in Wales enjoying golf and benefiting their health, but there are some useful lessons that these resources do work.

The evidence presented by golfers, by scientific experts, by celebrities, can impact and get more people to get a club in their hand.

Similarly with events, you've seen The R&A, DP World Tour, and the Ladies' European Tour, really use these messages – not only to allow people to enjoy an amazing sporting spectacle, but also to promote walking.

If you go to The Open, the AIG Women's Open, or the Genesis Scottish Open, you're very likely to see information about the health benefits of golf.

You're very likely to see a call to action to go out and walk the course and get the 11,500 steps people get on average.

You're seeing facilities and affiliates really joining in. For the Scottish Open, you'll see a collaboration with Scottish Golf, for the BMW PGA Championship [it's] the Golf Foundation. We're really showcasing a lot of the amazing work they've done.

There's a lot more collaboration in the industry, both between affiliates and also between affiliates and The R&A, and with media. Everyone has got an important role to share the message about the health benefits of golf.

If I'm an affiliate, how can I use this report to get more people playing golf?

If you're an affiliate in Peru, or Nairobi, or Australia, the information is universal. If you go from being a non-golfer to a regular golfer, you're likely to be happier, you're likely to be healthier, you're likely to live five years longer, and you're likely to be more successful in what you do.

Physically active kids get better marks at school. Physically active adults do better in their workplace. They're off sick 30% less.

The information is consistent and growing and it's about getting that information out in a way that works for your general public.

There was an international consensus on golf and health, and it shared some key points as to what the golf industry and facilities can do to maximize the health benefits of golf.

Simply spread the word about the health benefits with golfers and potential golfers.

Promote inclusivity. Encourage participation by everybody, have environments and price structures that are welcoming to all – including beginners.

Facilities in addition to golf could include padel courts, gyms, walking routes and childcare. That links to inspiring and recruiting more women and girls to play golf.

Provide other things important to maintaining health, such as water and healthy food and stocking sunscreen. Warm up facilities can be useful and thinking about avoiding the mandatory use of golf carts – encouraging people to walk the course.

That might be walking and carrying a bag, or it could be using a pull or pushcart, which has equivalent benefits as well.

Promote safety and sustainability. The modern consumer is quite savvy about thinking about water, energy and chemical use.

There are many things affiliates and facilities can do to really showcase a sport with wide ranging health benefits. By taking concrete actions, you're more likely to get people into golf and keep people playing golf.

What's coming up in the future?

There are three exciting things The R&A is supporting. The first is getting this information out at pace and scale, supporting facilities and affiliates to make sure this information does get to golfers, potential golfers, policymakers and decision makers, and really constructively challenging facilities and affiliates to put best practice in place.

“ If you go from being a non-golfer to a regular golfer, you're likely to be happier, you're likely to be healthier ”



What are the health benefits of playing golf?

- On average, golfers live five years longer than non-golfers.
- Golf can help prevent and treat 40 major chronic diseases.
- Golf can help strength and balance, improve quality of life and provide aerobic exercise.
- On a regular 18-hole course, most players walk between four and five miles, burning up to 2,000 calories.
- Golf provides social interaction, a significant protective factor for mental health and wellbeing.
- Spectators walk between five and six miles on average and burn more than 1,000 calories per day.
- Golf can help reduce health costs and can add value to health systems through social impact.

Suggested actions for national federations

- Share the health benefits of the sport with golfers, potential golfers, industry colleagues and policy makers.
- Promote inclusivity – encourage increased participation by developing welcoming environments and price structures that are accessible to all, including beginners.
- Inspire and recruit women and girls, people with a disability and people from diverse backgrounds to play golf.
- Share good practice and encourage the participation of golf facilities in health initiatives.
- Multi-functionality – encourage non-golf related facilities and use.



In focus: The AIG Women's Open 2025

The AIG Women's Open at Royal Porthcawl in 2025 showed how major events can be used as a platform to promote the many health and wellbeing benefits of golf.

Spectators visiting the Welsh venue were reminded of the benefits of walking the course, while children and families had the chance to try golf. Community step challenges and club-based programmes involved the wider public.

During the month of the Championship, more than 92,000 rounds of golf were played at participating clubs, while 876,235,000 steps were taken by Welsh golfers in July. That was enough to walk around the world more than 17 times.

"What was fantastic about the AIG Women's Open is that the Welsh Government, Wales Golf, The R&A and others pulled together best practice regarding maximising health through golf events and put it in place at the event," said Dr Murray.

"This included sharing key messages about the health benefits of golf on site, on social media and through players, providing opportunities for all on site to try golf, having step count challenges in the local community and much more."

These key actions can really help unlock and maximise the health benefits of golf.

The second is all major events promoting the health benefits of golf. It has unique benefits. Come to a golf event, you'll get 11,500 steps but you've also got four square miles of billboards we can use to make a difference to people and give them information to enhance their golf or their wellbeing beyond the event itself.

Thirdly, it's more case studies to understand and take a deep dive into what really works. We know what the science is but how can we implement that? We can work with universities, affiliates, facilities and others to really understand what's working.

If you look at the report, there are already some nice case studies there. Hopefully those can be scaled. If you've got a golf and society [project] working in the UK, why couldn't that work in Japan? Why couldn't that work in South Africa? Why couldn't it work wherever? ●

In focus: Strength and balance

A study backed by The R&A found evidence that golf may help maintain strength in players aged over 80.

Research led by Professor Maria Stokes OBE and researcher Dr David Wilson, School of Health Sciences at the University of Southampton, involved 152 individuals in two age categories: 65-79 and over 80 years.

Simple tests, carried out at golf clubs and community centres, included measuring hand grip strength and how many times a person could stand up and sit down in 30 seconds. Static balance tests included standing still on one leg, while dynamic balance was tested by reaching a leg in different directions while standing on the other leg.

Golfers aged 65-79 were compared to sedentary non-golfers of the same age, while golfers over 80 were compared with the younger non-golfers.

The research found golfers aged 65-79 were stronger and had better balance than non-golfers, while golfers over 80 had similar strength and static balance to younger non-golfers.

Dynamic balance wasn't well maintained in those over 80, with people encouraged to do other activities to maintain balance. This was considered important for walking safely over uneven ground playing golf.



R&A



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