



Golf around the world 2017





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About this report

Golf around the world explores golf's global reach in terms of the supply of golf facilities, both existing and under development. It therefore provides a snap shot of current conditions and a preview of the near future. This second edition presents a refined account of the inaugural worldwide golf course census highlighted in the previous edition. It places golf course supply and development within a context of emerging trends that highlight the distinctiveness of the six regions into which the world's golf map has been divided.

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

The R&A would like to thank the NGF for the research that made this report possible, Bradley Klein, a distinguished American author and golf writer who developed the narrative for this report, and David Kelly of the PPL group.

For more information, or to download a digital copy of this report, please visit www.randa.org

ACKNOWLEDGEMENTS

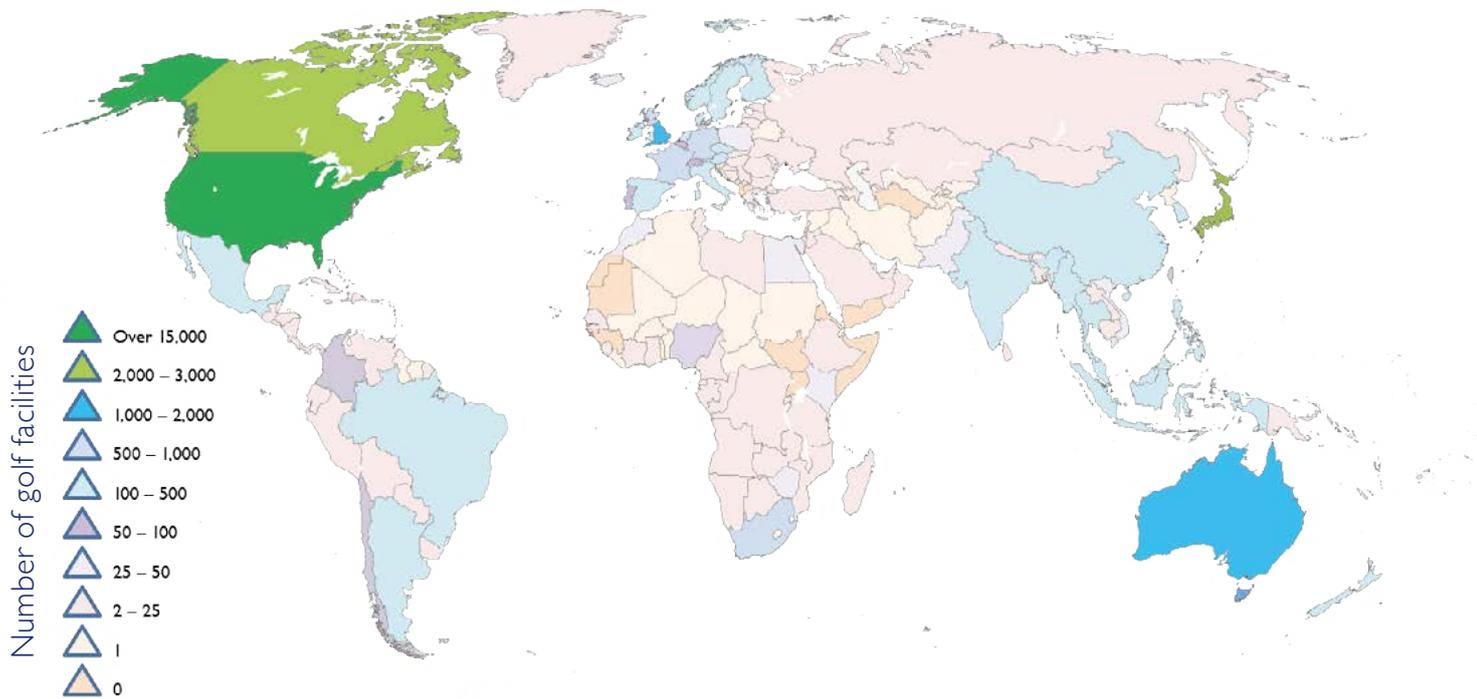
Research: National Golf Foundation, Jupiter, FL U.S.A.

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Global golf supply



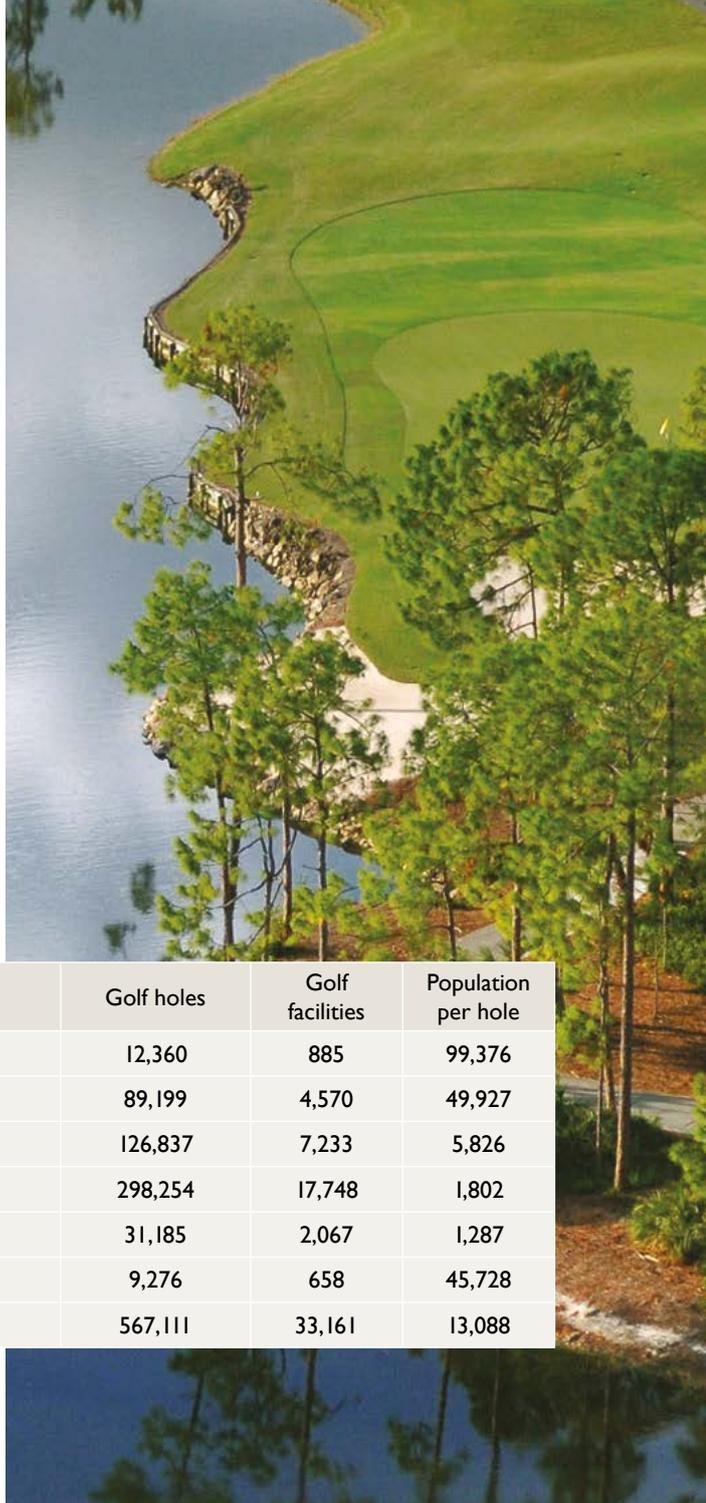
Golf is available around the globe. As of year-end 2016, there were 33,161 golf facilities in 208 of the world's 245 countries. That's an 85% diffusion rate of the sport globally. Still, the sport is geographically concentrated, with 74% of the world supply of courses located in the top 10 golfing countries: the United States, Canada, Japan, England, Australia, Germany, France, Scotland, Sweden and South Africa.

The majority of worldwide supply is located in the western hemisphere. North and South America are home to 55% of world supply; the U.S. alone claims 45% of the world's total. Europe has the second largest regional share with 22% of the world's total, followed by Asia with 14% and Oceania with 6%.

Though the sport has traditionally been associated with private clubs where play is essentially restricted to members, in fact golf worldwide is overwhelmingly played at facilities where non-member play is possible, with 75% of courses open to the public in some form or another on a "pay per play" basis.



GLOBAL GOLF SCORE CARD	
Land area	147,553,000 km ² / 56,970,000 miles ²
Countries	245
Golfing countries	208
Golf facilities	33,161
Golf holes	567,111
18-hole equivalents	31,506
18HEQs under development	556
Population	7,422,606,586
Private clubs	8,204
Public clubs	24,957
Population per golf hole	13,088



Golf facilities compared to population

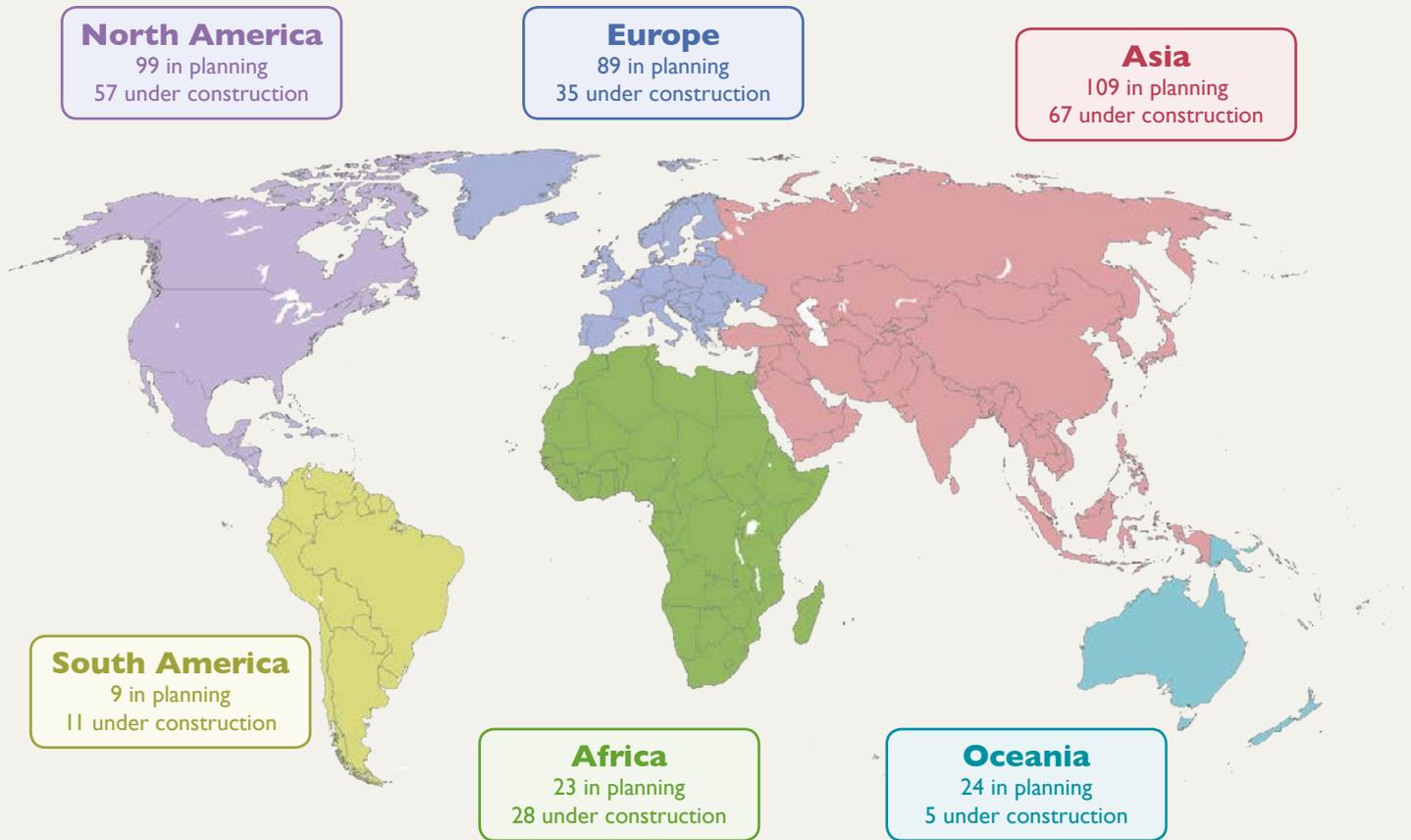
Region	Population	Golf holes	Golf facilities	Population per hole
Africa	1,228,281,312	12,360	885	99,376
Asia (including the Middle East)	4,453,456,868	89,199	4,570	49,927
Europe	739,011,307	126,837	7,233	5,826
North America (plus Central America & Caribbean)	537,550,473	298,254	17,748	1,802
Oceania	40,131,018	31,185	2,067	1,287
South America	424,175,608	9,276	658	45,728
The World	7,422,606,586	567,111	33,161	13,088

Golf facilities compared to land area

Continent	Area	% of total land area on earth	Golf facilities	% of world golf
Africa	30,065,000 km ² / 11,608,000 miles ²	20%	885	3%
Antarctica*	13,209,000 km ² / 5,100,000 miles ²	9%	1	0%
Asia (including the Middle East)	44,579,000 km ² / 17,212,000 miles ²	31%	4,570	14%
Europe	9,938,000 km ² / 3,837,000 miles ²	7%	7,233	22%
North America (plus Central America & Caribbean)	24,256,000 km ² / 9,365,000 miles ²	16%	17,748	54%
Oceania*	7,687,000 km ² / 2,968,000 miles ²	5%	2,066	6%
South America	17,819,000 km ² / 6,880,000 miles ²	12%	658	2%
The World	147,553,000 km ² / 56,970,000 miles ²	100%	33,161	100%

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

Worldwide development of the sport



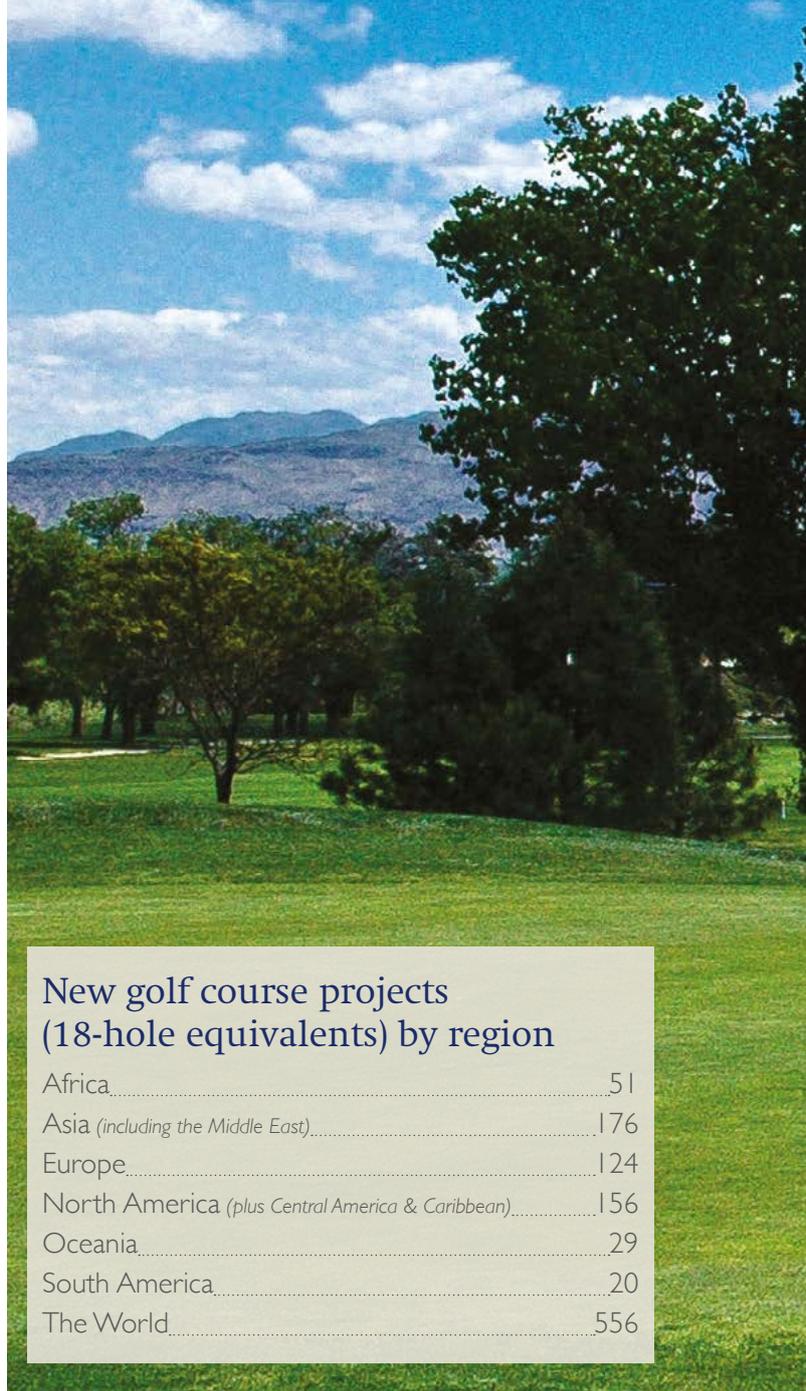
Golf has its origins in the sandy soil of the British coastal terrain. The naturally draining, moderate climate was ideal for the sport to develop along what was called "linksland." As the sport grew in popularity, golf courses sprang up on inland sites, including open meadow, farmland and tree-lined parkland.

Many of the original British links courses were on public land and thus technically open to common play. But as the sport travelled overseas and got established in the U.S. and in Europe, Africa and Asia, it acquired the caché of private exclusivity. Private clubs dominated and publicly accessible courses were at first only a minor share of the total mix. But that 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 556 new golf course projects (measured in 18-hole equivalents) in various stages of active construction or advanced planning. More than half are associated with resort developments, highlighting a close relationship between golf, tourism and economic development. The fact that there are 203 active construction projects and another 353 on the drawing board (considered "in planning") is evidence of a continued expansion of the sport.

Africa has 51 new projects underway, involving 19 different countries. European development has moved eastward on the Continent, with such non-traditional golf countries as Hungary, the Czech Republic and Kazakhstan all sporting new projects tied to residential and resort development complexes. In Asia, the shift is to the south, with Vietnam having 41 facilities in place and another 32 in different stages of development. India, with 267, has project activity that could add another 28.

Throughout the world, golf is being used as an engine not just of sport and recreation 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.



New golf course projects (18-hole equivalents) by region

Africa.....	51
Asia (including the Middle East).....	176
Europe.....	124
North America (plus Central America & Caribbean).....	156
Oceania.....	29
South America.....	20
The World.....	556

Golf course development overview ¹

Region	2010-2016 Openings	Closures ²	Under construction
Africa	44	27	28
Asia (including the Middle East)	218	307	67
Europe	185	245	35
North America ³ (plus Central America & Caribbean)	61	144	57
Oceania	23	85	5
South America	28	15	11
The World	568	822	203

¹ Measured in 18-hole equivalents

² Closures were found between 2010 and 2016 but may have occurred in prior years

³ North America does not include the US

Africa

Africa is golf's most under-developed continent. With 20% of the earth's land mass and 16% of its population, Africa is home to only 3% of all golf courses – an average of 99,376 people per golf hole.

Golf initially took hold in major trading centres where large ex-patriot and settler communities sought to reproduce the comforts of homeland Britain, especially in South Africa, but also throughout the continent. The strong local tradition of golf at such classic-era courses as Durban 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 population at large.

It took the worldly travels of a few accomplished golfers to start opening up the continent to golf. Future Hall of Famers Bobby Locke and Gary Player were South African sports pioneers back in the post-World War Two era who helped popularise the sport. Player was particularly influential, taking a leadership role in developing golf participation in his home country.

Development

Africa currently has 51 projects in development involving 19 different countries. Morocco, with 40 in place, is poised to boost its supply by nearly 20% with 8 in various stages of construction. The plan there is to take advantage of the country's lucrative tourism trade from Europe. Nigeria, with 52 courses up and running, has 9 projects underway, most of them part of real estate communities intended to meet the lifestyle choices of the country's growing middle class.

Featured Project

Al Houara Golf Resort, Tangier, Morocco

Tangier, Morocco, is among the world's most international cities. Separated from Europe only by the Straits of Gibraltar, it has long been an intriguing metropolis where religions met, cultures clashed and spies kept their safe houses in both wartime and the Cold War. So it's no surprise that the latest golf project in the area is a truly international effort.

Al Houara Golf Resort, 15 miles southwest of Tangier's historic Kasbah district, occupies a 234-hectare/578-acre site along 2 miles of beachfront ground looking out onto the Atlantic Ocean. The \$660M development plan is funded and managed by Qatari Diar, the development arm of the Qatar government. More evidence of international involvement: Australian-based golfer Graham Marsh is teaming with native Fijian Vijay Singh on the design of the 18-hole, 6,400 yard long golf course.

The site plan includes a practice range, clubhouse, casino, golf villas, private estate residences and two hotels totalling 450 rooms. One of the revealing details about the golf programme is inclusion of a 9-hole par-3 short course – ideal for beginners, and those who want to warm up before or relax after a formal round on the "big" course.

Featured Project

New Giza, Egypt

Nothing in golf-related development in Africa embodies the spirit of modernity better than this fully-planned residential, work and recreational community 16 miles west of Cairo city centre. The 18-hole golf course is designed by Ross Perrett and Tim Lobb, of Surrey, England.

The 680-hectare/1,680-acre site occupies an abandoned limestone quarry, some of whose walls run 100-feet deep to the floor. The trick in design was to coordinate the golf course with an ambitious master-planned community that included 4,000 mixed home sites, apartment blocks, office parks, a 200-room hospital and medical campus, 23-acre sports park, luxury hotel, transportation hub and campus complex for New Giza University.

A central part of the design scheme for New Giza was to emphasise the visual and cultural power of the Pyramids of Giza, only 4 miles southeast of the site. Perrett and Lobb helped devise a grading plan that maximises view corridors and open space for the entire community. They've also arranged for a 2.5-mile walking trail to wrap around the golf course without impeding play. There's no doubting the unique setting when full play commences in 2017; the opening tee shot lines up perfectly with the pyramids.

The layout itself is conventional core routing, unimpeded internally by real estate, with home sites only on the outside. With water scarce in such an arid climate, regular maintenance will rely upon recycled water from the newly created town.

New Giza, Egypt



Credit: New Giza Plan, Egypt (Lobb & Partners)



TOP 5 IN AFRICA	
SOUTH AFRICA	484
NIGERIA	51
KENYA	42
MOROCCO	40
ZIMBABWE	39

AFRICA GOLF SCORE CARD	
Land Area	30,065,000 km ² / 11,608,000 miles ²
Countries	59
Golfing countries	49
Golf facilities	885
Golf holes	12,360
18-hole equivalents	686
18HEQs under development	51
Private clubs	82
Public clubs	803
Population	1,228,281,312
Population per golf hole	99,376

55%
of Africa's golf supply is located in South Africa

Morocco has **8** golf projects in development = **20%** increase

19 Countries in Africa have golf projects in development

Africa has **3%** of the world's golf facilities and **9%** of new golf projects

Asia

With 60% of the world's population on 31% of the earth's land mass, Asia is home to 4,570 golf facilities, representing 14% of the total count. But with 176 golf projects in various stages of design, development and construction, Asia now claims 32% of all new undertakings currently identified worldwide.

Traditionally, private clubs have dominated the Asian scene; 44% of golf courses there count themselves as private clubs, including 80% of the golf facilities in India, compared to 25% open to membership-only when we look at the golf world as a whole. In Asia, this is the 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 groups. Today, that mix is shifting decidedly towards the resort side, with the vast majority of new projects intended to attract tourism, both from city to warm seaside and from more industrialised developed countries to emerging, developing ones.

Development

In the last twenty years there has been phenomenal growth in Asian golf, with Thailand (240 golf facilities), India (267) and China (383) 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 has become a popular golf destination. China's Hainan Island, the smallest and southernmost of China's provinces, has 37 of that country's courses thanks to a determined effort by provincial and national authorities to develop the island as a tourist destination. Development on Hainan has been especially strong around Haikou to the northeast; in the warmer region of Sanya on the southern point; and mid coast along the eastern side of the island facing the South China Sea.

Featured Project

Akbulak Club Resort, Kazakhstan

Golf was once considered a "bourgeois indulgence" that was forbidden to the masses during the long reign of the USSR. Not until that republic's break up in 1989 did the constituent countries, including Kazakhstan, secure the opportunity to develop national markets and with it, an emerging middle class. The development of Akbulak Club Resort, a ski and golf retreat in the foothills of central Asia's Tian Shan Mountains, is healthy evidence of an economy gaining sail under its wings.

The resort's seeming remoteness, in a corner of central Asia where Kazakhstan, Kyrgyzstan and the far northwest of China converge, is not so forbidding for the 1.7 million people who live in the former national capital of Almaty, only 35 miles to the west. For them, this 980 hectare/2,421 acre getaway will provide ideal temperate conditions, a mile above sea level in rolling foothills. The golf course was designed by Colin Montgomerie/IMG Group.

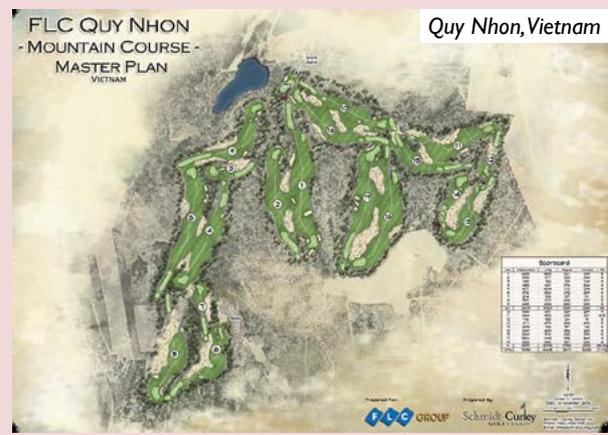
Featured Project

Quy Nhon, Vietnam

Few countries are more poised for tourism development than Vietnam – in the process dramatically expanding its golf inventory from its current count of 41. It helps having 2,000 miles of coastline and a warm enough climate for year-round resort trade.

Quy Nhon Resort, located at the mid-central coast, has the Jack Nicklaus-designed Ocean Course which opened in 2015 and a newly minted Mountain Course by Lee Schmidt and Brian Curley that opens in 2017. The design and construction of the Mountain Course might well have set an industry record – four months from the moment in June 2016 when Curley first set foot on the site to completion of the grassing.

Schmidt and Curley's Mountain Course occupies sparsely treed sand dunes, some of them 250 feet high. The routing, 7,040 yards, par-72, has 16 holes looking out onto the South China Sea. Given the prevalence of strong coastal winds there's plenty of playing width. Unlike many courses built on such terrain, this one is entirely walkable thanks to intimate green-to-tee connections.



Credit: Schmidt-Curley Golf Design

Europe

Golf took hold naturally along the sandy shorelines of Great Britain, particularly along the east coast of Scotland. What emerged there on the “links” was ideal golf ground in terms of drainage, ability to sustain native grasses and firmness of the playing surface. Architects in the last 100-150 years have worked hard to emulate, or produce through human exertion, an acceptable version of those natural conditions on inland sites with heavier soils.

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 distant resort outposts within easy reach

of vacationers. 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 to those living in London and Manchester.

The sport's spread to the Continent of 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 advent of popular middle class vacation 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.

Featured Project

Zala Springs Resort, Zalacsany, Hungary

Hungary, with 17 courses for the entire country, now has its first master planned resort and residential golf community. Zala Springs, a Robert Trent Jones Jr. design that opened in 2016, could not be more ideally located. It sits precisely 125 miles equidistant from four major central European capitals: Budapest, Hungary to the northeast; Bratislava, Slovakia to the north; Vienna, Austria to the northwest; and Zagreb, Croatia to the southwest. The big attraction has always been Lake Balaton, central Europe's largest freshwater lake, whose far southwest shore is only one mile from the property.

The routing of this par-72 golf course, 6,945 yards from the back tees, 5,625 yards from the front, forms a counterclockwise loop around the perimeter of the property that buffers real estate and the resort on the inside. A pedestrian walkway traverses the site with plenty of safety margin away from golf. While the back tees provide sufficient demand for any championship, the course from the middle and forward tees affords generous angles and a minimum of forced carries. In fact, the only two holes where a player confronts water in front of the green, both the 158-yard par-3 5th hole and 178-yard par-3 12th hole, offer safe zones to the side and long as well.

Bruce Charlton, Jones Jr.'s partner and lead design associate on the course, reports that project manager Tamas Benkocs was the ideal overseer of the development. “He was a newcomer to the sport who became a complete golf bug,” says Charlton. Sometimes, having a fresh set of eyes available is the best way to avoid clichés and to promote innovative forms. That's evident in the starkly modernist building designs, including a squared off stone and glass linear clubhouse, 32,000 square feet, perched on waterfront right behind the 18th green.

Zala Springs Resort, Hungary



Featured Project

Tribute Course at Castle Stuart, Inverness, Scotland

For all the gains that golf made in 2016, the sport's biggest loss was the passing of Arnold Palmer. Appropriately, he left one more design on the drawing board after he and his team completed hundreds of courses in 37 U.S. states, 25 countries and 5 continents. This one's in northern Scotland, a second links course to accompany the already successful Castle Stuart course overlooking the Moray Firth that Gil Hanse designed with owner/developer Mark Parsinen. Palmer approved the routing for the Tribute Course during his last visit to Scotland in July 2015. The field work will now be conducted by Palmer's two design associates, Brandon Johnson and Thad Layton, in collaboration with Parsinen and the Castle Stuart team. A focal point for the design will be two old burns (creek beds) that feature as strategic elements and provide ample drainage as well.

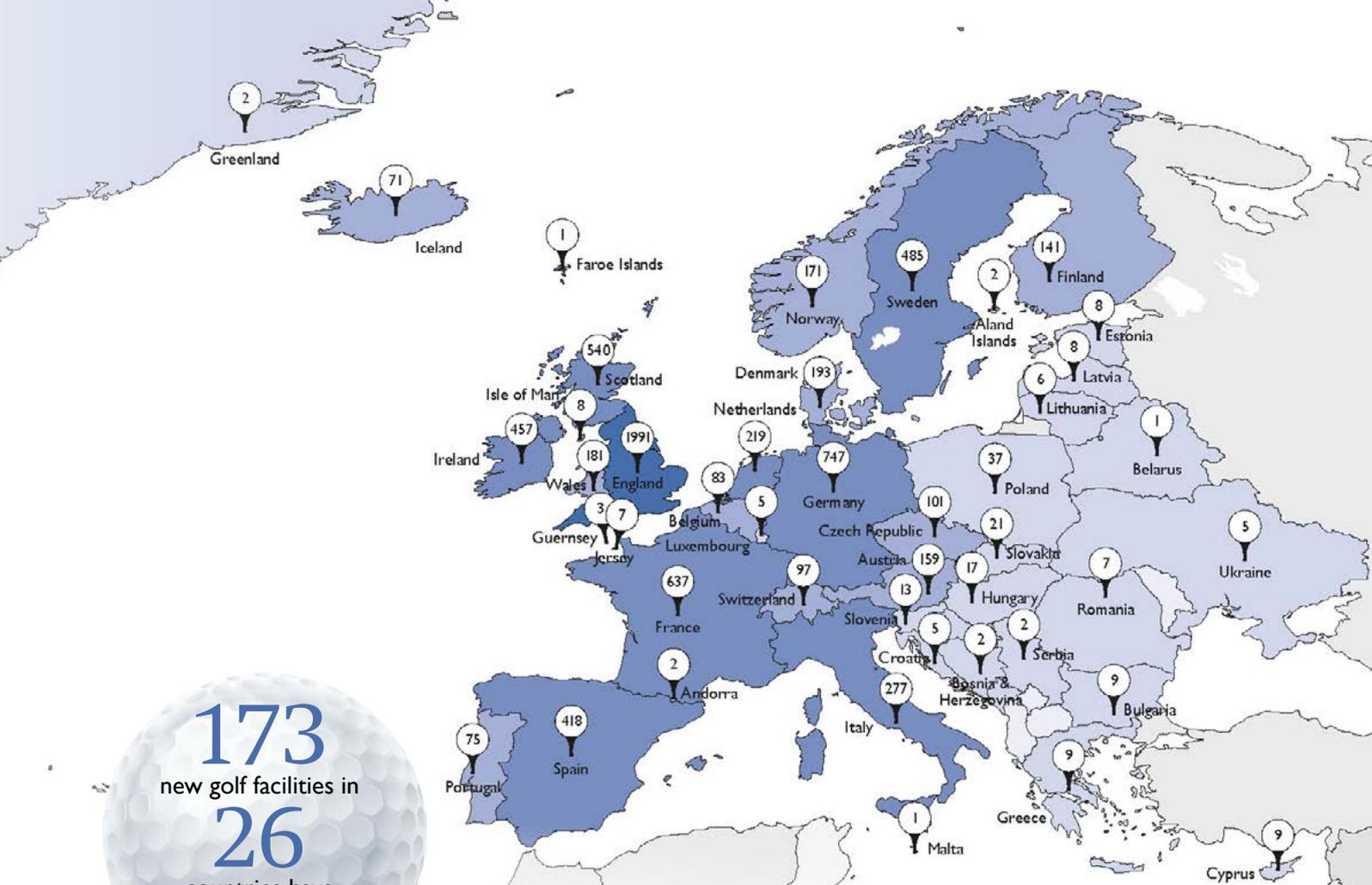
The Castle Stuart property comprises 500 acres of raised sand-based meadowland and frontage along Castle Stuart Bay. Planning permission through the Highlands Council includes the second course, two hotels, a spa, 148 lodges and a par-3 course. Site plans include conversion of the 400-year old Castle Stuart into a full service inn.

The accommodation is well positioned to alleviate some of the pressure on Inverness, which now has among the highest hotel occupancy rate in the U.K. Inverness has been Europe's fastest growing city two of the last ten years, and Castle Stuart has become something of a gateway project for regional golf tourism.

Arnold Palmer at Castle Stuart, Scotland



Credit: Con Brtt. Castle Stuart Group



173
new golf facilities in
26
countries have
opened in Europe
since 2010

30%
of new golf development
in Europe is in the UK

TOP 5 IN EUROPE

ENGLAND	1,991
GERMANY	747
FRANCE	637
SCOTLAND	540
SWEDEN	485

Development

Today golf is well established throughout the north and west of Europe and is making steady progress into the central and southeastern regions. Today, Europe claims 8 of the top-20 countries in terms of golf facilities: No. 4, England (1991); No. 6, Germany (747); No. 7, France (637); No. 8, Scotland (540); No. 9, Sweden (485); No. 11, Ireland (457); No. 13, Spain (418); and No. 17, Italy (277). There's every reason to believe that continent-wide, the sport is holding its own. Europe currently claims 22% of the world's golf facilities and is home to 22% of all golf projects in construction or on the drawing board.

EUROPE GOLF SCORE CARD	
Land Area	9,938,000 km ² /3,837,000 miles ²
Countries	54
Golfing countries	44
Golf facilities	7,233
Golf holes	126,837
18-hole equivalents	7,047
18HEQs under development	124
Private clubs	1,487
Public clubs	5,746
Population	739,011,307
Population per golf hole	5,826

North America, Central America and the Caribbean

Golf in North America is primarily a public affair, to the tune of 77% of all golf facilities 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. While many of them have held on to their reputations, particularly as the scene of majors and prestigious championships, the sport has now been handed over to the daily-fee, resort and municipally-owned side of the ledger.

One revealing fact highlighting this trend is the recent commitment of the USGA to staging its men's U.S. Open on public courses. From 1895 to 1971, the U.S. Open was played entirely at private clubs. Over the next 27 years the U.S. Open took place on a public course only 3 times, all at Pebble Beach in California (1972, 1982, 1992). Then things changed. From 1999 through 2017, the USGA will have staged 10 out of 18 U.S. Opens at public venues.

Development

The number of golf facilities in the U.S. and Canada has been slowly declining in recent years, following an explosive boom in new course construction in the 1990s and early 2000s. Most observers consider the decline a necessary rebalancing of supply and demand. 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-sport practice areas, expanded ranges, par-3 courses of nine holes or less; family putting courses (*à la* the "Himalayas" in St Andrews); and sophisticated tee-sheet management that allows for 3-hole or 6-hole loops on under-utilised stretches of the golf course.

Featured Project

Danzante Bay, Loreto, Mexico

Two-thirds down the Baja Peninsula, 300 miles north of Cabo San Lucas, Rees Jones and his design associate, Steve Weisser, are completing their design firm's first project in Mexico.

Danzante Bay at Villa del Palmer occupies a stunning setting, 250 feet above the Sea of Cortez to the east and backed by the Sierra de la Gigante Mountains to the west. The 648-hectare/1,600-acre site will include six hotels and 250 condominium-style residences.

The golf course, with 11 holes open for play and the other 7 well under way, is routed variously through desert, mountain, sand dunes and cliff side. It culminates in what promises to be one of the most photographed holes in modern North American golf, the 178-yard, par-3 17th to a green set diagonally on an outcrop with nothing around it but free fall to the water behind and below. The property is 20 miles south of the airport-accessible town of Loreto (pop. 14,000), though much of the handwork for building the course (including greens like that precariously placed 17th) came from a small fishing village, Luguí, adjoining the golf property.

Featured Project

Sand Valley Golf Resort, Nekoosa, Wisconsin

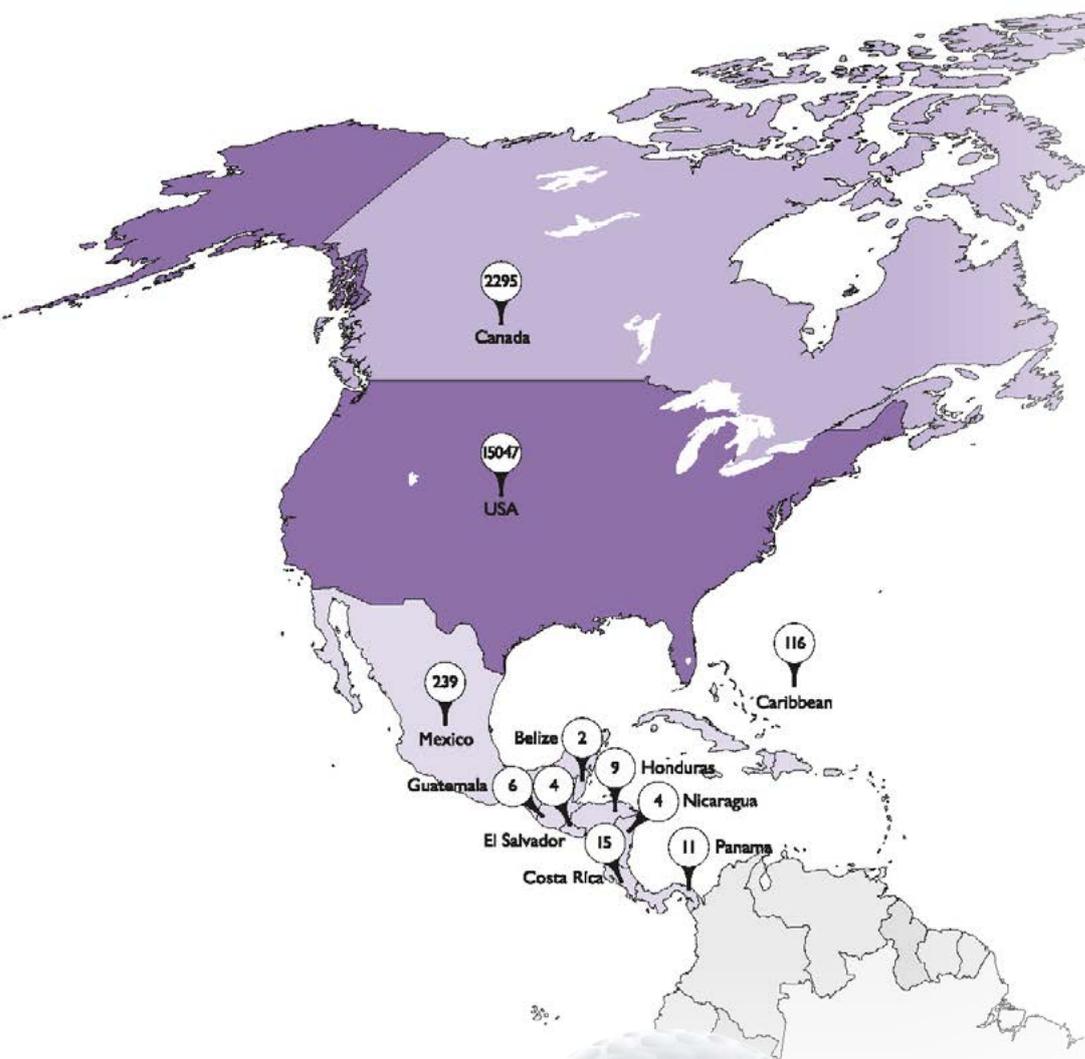
"Location, location, location" used to be the mantra of golf developers – and of real estate folks. While "build it and they will come" has turned out to be overly optimistic, former greeting card magnate-turned golf resort developer Mike Keiser has proven that if you make it interesting and fun enough, people will find a way to get there. He proved it at Bandon Dunes resort on the coast of Oregon, which now has four 18-hole courses and a 13-hole par-3 and is about to start on a fifth 18-hole course. Keiser also partnered with Canadian businessman Ben Cowan-Dewar on creating two courses in the (formerly) run-down fishing village of Inverness, Nova Scotia, Canada that have helped revive tourism throughout Cape Breton Island. Now he's focusing on a 687-hectare/1,700-acre sand box in central Wisconsin.

Sand Valley is just that – a vast rolling expanse of perfectly draining golf ground that's also centrally located – roughly equidistant (+/- 200 miles) when triangulated from three major cities: Chicago, Milwaukee and Minneapolis. The draw will be a pure links-style experience, with the first course by Bill Coore and Ben Crenshaw already open and busy and a second layout by David McLay Kidd in the works. Long-term, the project could involve as much as 2,913 hectares/7,200 acres, enough for more golf as well as restoration of native bird, butterfly, elk and wolf habitat that had been displaced by pine row farms.

While his contemporaries a decade or two ago were touting real estate golf and championship courses, Keiser targeted what he called "the retail golfer," actual bill-paying players who loved the sport but were not highly skilled. That didn't mean oversimplifying a course; it meant providing options, as well as room to recover from wayward shots. The result has been a revolution in course design. What had long been a region famous for cabin life, lake fishing and late night beers and sausage has now seen a new market coming in, often from afar, to experience classical golf in a powerful natural setting.

Danzante Bay, Mexico





CARIBBEAN	
Anguilla	1
Antigua and Barbuda	2
Aruba	2
Bahamas	10
Barbados	5
Bermuda	6
Bonaire, Eustatius, Saba	1
Cayman Islands	2
Cuba	3
Curacao	3
Dominican Republic	27
Grenada	1
Guadeloupe	1
Haiti	1
Jamaica	11
Martinique	1
Puerto Rico	17
Saint Kitts and Nevis	4
Saint Lucia	2
Sint Maarten (Dutch)	1
St Vincent and Grenadines	2
Trinidad and Tobago	8
Turks and Caicos Islands	1
Virgin Islands, US	4
<i>Total</i>	116

77%
of golf facilities in North America are open to the public

North America accounts for
54%
of world golf supply

TOP 5 IN NORTH AMERICA, CENTRAL AMERICA AND THE CARIBBEAN	
USA	15,047
CANADA	2,295
MEXICO	239
DOMINICAN REP.	27
PUERTO RICO	17

NORTH AMERICA GOLF SCORE CARD	
Land Area	24,256,000 km ² / 9,365,000 miles ²
Countries	34
Golfing countries	34
Golf facilities	17,748
Golf Holes	298,254
18-hole equivalents	16,570
18HEQs under development	156
Private clubs	4,148
Public clubs	13,600
Population	537,550,473
Population per golf hole	1,802

Oceania

Oceania shows the influence of the British on golf's worldwide diffusion. Australia and New Zealand, whose settlement by the British dates back to 1789, are among the world's leading countries in terms of golf facilities. Australia, with 1,591, ranks No. 5; New Zealand, with 410, ranks No. 14. Together, they contain 97% of the region's courses. Behind them on the list are Fiji with 17 and Papua New Guinea with 15.

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 countries remained largely isolated from the early growth of golf course architecture, until a famous journey there by course designer Alistair MacKenzie in 1926. During his sole visit to the region in his distinguished career, MacKenzie managed to remake the face of golf there through his design or renovation of such world-class layouts as Kingston Heath, New South Wales, Royal Adelaide, Royal Melbourne, Royal Sydney and Victoria, as well as Titirangi in New Zealand.

It helped the cause of golf in Australia and New Zealand that the sport was taken seriously by competitive sportsmen, some of whom achieved World Golf Hall of Fame status: Bob Charles, David Graham, Kel Nagle, Peter Thomson, Greg Norman, Walter Travis and Karrie Webb. They've now been joined by a representative from the rest of Oceanian golf, Vijay Singh of Fiji.

Development

As well established as golf courses are in Australia and New Zealand, there have been some dramatic breakthrough projects lately that have drawn worldwide attention. On New Zealand's North Island, Kauri Cliffs, designed by David Harman (No. 39 in the world, *Golf Digest*) and the Tom Doak-designed Cape Kidnappers (No. 22 in the world, *Golf Digest*), both occupy overwhelmingly dramatic coastal cliffs that have appealed to an upscale daily-fee market, while the Doak-designed Tara Iti has just opened as a very exclusive private retreat on a coastal dunes setting.

In Australia, Tasmania has been developing its tourism trade through modestly-priced daily fee golf, most notably through two links-style courses at Barnbougle: The Dunes Course, by Doak and Michael Clayton (No. 11 in the world, *Golf Digest*); and Lost Farm by Bill Coore and Ben Crenshaw (No. 23 in the world, *Golf Digest*).

Featured Project

Cape Wickham and Ocean Dunes, King Island, Australia

For all the sophisticated land planning and engineering that go into modern golf course development, nothing beats having a pure site. These days, the land for golf doesn't get more compelling – or more remote – than Cape Wickham Golf Links, King Island, Australia. The 424-square mile island, population 1,600, is technically part of Tasmania and sits midway between that state and mainland Australia, just where the Bass Strait spills out into the Great Southern Ocean.

King Island's rocky, windswept coast is notoriously dangerous for the sea faring. An iconic lighthouse was built in 1861 on the island's north shore to provide guidance to sailors. At 160 feet high it's Australia's tallest. And it's virtually within the island's shadow that that Australian golf businessman Duncan Andrews decided to cast his lot on a standalone, daily-fee golf course. Along came Australian golf writer/photographer/consultant Darius Oliver (of "Planet Golf" renown), who teamed with U.S.-based course design Mike DeVries. Together, they've created a raw, unmediated sensory overload links experience that makes more than worthwhile the determined effort to get here.

There's no ferry service across to King Island. Visitors arrive by regularly scheduled flights or charters, most of them from Melbourne, 45-minutes away by air. With eight holes directly on the shoreline and every hole looking out to open water, the golf course is a throwback to uncluttered, simple links golf.

Meanwhile, there has arisen an even newer project on the island's western shore, 25 miles south of Cape Wickham, midway between King Island Airport and the island's largest town, Currie (pop. 750). Ocean Dunes Golf Course, by former Kingston Heath superintendent-turned architect Graeme Grant, ambles along 115 hectares / 285 acres of pure bluffs and dunes around the shore of Three Rivers Bay, with endless views out onto the Great Southern Ocean. The front nine opened in 2015; the back nine is set to open early in 2017. It has a softer, longer-flowing feel compared to Cape Wickham and provides another very good reason to make the trek over from the mainland. All of a sudden, a golf destination is born.



Cape Kidnappers, New Zealand



SOUTH PACIFIC	
American Samoa	1
Antartica	1
Fiji	17
Guam	9
Kiribati	1
Marshall Islands	1
New Caledonia	4
Niue	1
Norfolk Island	1
Northern Mariana Islands	6
Papua New Guinea	15
Samoa	4
Solomon Islands	1
Vanuatu	4
<i>Total</i>	66

94%
of golf facilities are open to the public

TOP 5 IN OCEANIA	
AUSTRALIA	1,591
NEW ZEALAND	410
FIJI	17
PAPUA NEW GUINEA	15
GUAM	9

24
new golf facilities have opened in Oceania since 2010

OCEANIA GOLF SCORE CARD	
Land Area	7,687,000 km ² /2,968,000 miles ²
Countries	26
Golfing countries	16
Golf facilities	2,067
Golf holes	31,185
18-hole equivalents	1,733
18HEQs under development	29
Private clubs	131
Public clubs	1,936
Population	40,131,018
Population per golf hole	1,287

South America

Two recent developments in South America have raised hopes for the development of golf across the continent. The 2016 Olympic Sports featured golf for the first time since 1904 – at an event held for the first time in South America. The worldwide attention paid to the men’s and women’s competitions held on the Olympic Golf Course in Rio de Janeiro can only help the sport, especially in Brazil.

It was impressive enough that the Gil Hanse-designed course and the rest of the Olympic facilities were finished on time and ready for the Games. It also helped that the golf course, measuring 7,128 yards for the men and 6,245 yards for the women, held up so well and provided such a compelling stage for players from throughout the world. The layout’s environmental sensitivity in terms of its light footprint on the ground will be a model for future development.

Equally impressive were the results. Though no South American medalled, the continent was well represented. On the men’s side: Emiliano Grillo, ARG (T-8); Fabian Gomez, ARG (T-15); Fabrizio Zanotti, PAR (T-15); Adilson da Silva, BRA (T-39); Felipe Aguilar, CHI (T-39); and Jhonathan Vegas, VEN (T-50). On the women’s ledger: Mariajo Uribe, COL (T-19); Julieta Granada PAR (T-44); Miriam Nagl, BRA (52); and Victoria Lovelady, BRA (T-53). That’s 10 out of 120 competitors, or 8%, which is much higher than the continent’s share of the world’s golf courses (2%).

Development

The growth of regional golf is helped by the growing luster of the Latin America Amateur Championship, inaugurated in 2015 at Pilar in Buenos Aires and subsequently moved to sites throughout South and Central America. The winner of this prestigious annual event receives an invitation to the Masters Tournament as well as the U.S. Amateur Championship (conducted by the USGA) and The Amateur Championship (conducted by The R&A). 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 – 55% of all courses, far higher than any other region in the world. Recently, the balance has been tipping, thanks to the recent infusion of resort and public access facilities. The continent has added 34 courses since 2010, representing 5% of its current golf inventory – the highest growth of any region.

Featured Project

Costa Jama Beach & Golf Resort, Jama, Ecuador

You can forget about the need for sunrise/sunset tables at this Steve Smyers design on Ecuador’s Pacific Coast. Not when you’re only 2.5 miles south of the equator, those predictable 12 hours of sunshine every day make for a very promising year-round resort. Developers anticipate drawing visitors from the 2.7 million residents of the capital city, Quito, 200 miles to the east. When you’re living on the upslope to the Andes there at 9,350 feet above sea level, 3.5 miles of beachfront idyll look even more inviting.

Ecuador only has golf 10 courses. Costa Jama Beach & Golf resort will be the country’s first 18-hole layout on the coast.

The course occupies ground between the Jama River and the coastline, most of it 50 feet above the shoreline. The routing, in the form of two returning nines, creates what Smyers calls “a journey” through upland woods, open savannah, riverfront ground, back through wooded terrain and then culminating in a stretch by the ocean before heading back to the interior.

The land plan includes mixed pods of resort and residential units scattered throughout the site. Construction of the golf course has been something of a throwback to an earlier, hands-on model of design-build in the field, with equipment limited to a bulldozer, a back hoe or two and lots of hand labour. The result is a ground-hugging, naturalistic design whose front nine opens in mid-2017.

Featured Project

Patagonia Virgin Frutillar, Argentina

Located in the city of Frutillar, known for its 19th Century German architecture and musical festivities, Patagonia Virgin Frutillar is the first integrated green residential community in Patagonia and home to the first Nicklaus Design golf course in Chile. Overlooking Llanquihue Lake, with views of volcanoes Osorno, Puntiagudo, Tronador and Calbuco, the links-style course sits 450 feet above sea level. The west side of the course interfaces with large ancient trees and the native rainforest that skirts the property. This unique community offers upscale housing options with beautiful lake and golf course views, resort hotels, retail shops, restaurants, a sailing club and marina, as well as hiking, biking and horseback riding trails. The golf course opened its first nine holes in December of 2015.

Patagonia Virgin Frutillar, Argentina





55%
of golf facilities in South America are private

34
new golf facilities have opened in South America since 2010

South America has
2%
of the world's golf facilities
4%
of new golf projects



SOUTH AMERICA GOLF SCORE CARD	
Land Area	17,819,000 km ² /6,880,000 miles ²
Countries	15
Golfing countries	14
Golf facilities	658
Golf Holes	9,276
18-hole equivalents	515
18HEQs under development	20
Private clubs	359
Public clubs	299
Population	424,175,608
Population per golf hole	45,728

Appendix/Definitions

18-Hole equivalent (18Heq)

A measure of golf supply calculated by taking the total number of golf holes and dividing by 18. For example, one 18-hole golf course equals one 18-hole equivalent. Two 9-hole golf courses equals one 18-hole equivalent.

Championship golf course

A golf course that meets the requirements to host a professional golf tournament or event.

Golf course

A tract of land containing at least six or nine holes, but not more than 18 holes of golf.

Golf facility

A business location where golf can be played on one or more golf courses.

Public facility

A golf facility that provides public access and may or may not offer memberships.

Private facility

A golf facility where play is restricted to members and their guests, and may offer limited public access.

Real Estate-related facility

A golf facility located in and considered an integral part of a real estate development.

Resort facility

A golf facility located in a setting that usually includes other amenities such as tennis, swimming, gym facilities, etc. and is situated in conjunction with a hotel or motel.

Real Estate/Resort facility

A golf facility that combines the features of a real estate development facility and a resort.

Project

A new golf facility or course, or an addition to an existing course, that is currently in one of the following stages of development:

Proposed

The project has been proposed awaiting government approvals and planning. The selection of an architect, civil and construction engineers are pending, and the plans are in a state of refinement.

In-planning

The project has been awarded to a developer and/or architect. Specifications are being written and key decisions being made. Funding is being secured and permitting applications are being filed.

Under construction

The general contract and subcontracts have been awarded. Work has begun and ground has been broken.

Completed/Open

The course is now open and ready for play.

On-hold

The project was in-planning or under construction, however, work has stopped and the project is on hold.

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.



Regions

■ AFRICA

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

■ ASIA

Afghanistan, Armenia, Azerbaijan, Bahrain, Bangladesh, Bhutan, British Indian Ocean Terr, Brunei Darussalam, Cambodia, China, Christmas Island, Cocos (Keeling) Islands, Cook Islands, French Polynesia, 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, Russian Federation, Saudi Arabia, Singapore, Sri Lanka, Syrian Arab Republic, Taiwan, Republic of China, Thailand, Tonga, Turkey, United Arab Emirates, Uzbekistan, Viet Nam

■ EUROPE

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

■ NORTH AMERICA

Canada, Mexico, United States, Caribbean: Anguilla, Antigua and Barbuda, Aruba, Bahamas, Barbados, Bermuda, Bonaire, 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, Central America: Belize, Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, Panama

■ OCEANIA

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

■ SOUTH AMERICA

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

Based in St Andrews, The R&A runs The Open, elite amateur events, international matches and rankings. Together The R&A and the USGA govern the sport of golf worldwide, operating in separate jurisdictions but sharing 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 140 countries and with the consent of 152 organisations from amateur and professional golf.

The R&A is committed to working for golf, supporting the growth of the sport internationally and the development and management of sustainable golf facilities.



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