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## Golf Round Trends

### Participation, Capacity & Demand

#### Thematic Handout – May 2026

#### Introduction

This analysis reviews golf participation, capacity and demand trends from 2019 to 2025, with a particular focus on how rounds, occupancy and utilisation have evolved across courses and user groups. The data shows a system that has recovered strongly from Covid-19, with sustained growth in rounds played and increased use of available capacity. While the overall balance between visitors and yearly ticketholders has remained stable, patterns of play have shifted by course, season and time of day. The key change is not the structure of access, but rising demand – most notably at peak times and on premium courses – creating growing pressure within a largely fixed tee time supply and access model.

#### 1. Participation and Capacity

Across the period reviewed, both participation and effective use of capacity have increased.

- Total rounds played have risen steadily since the Covid-19 disruption, reaching 296,906 rounds in 2025, the highest level recorded and above pre-Covid levels of 254,982.
- Overall utilisation (rounds played vs capacity) increased from 48% in 2022 to 52% in 2025, equating to an increase of around 42,000 annual rounds.
- Average group size is 2.8 players, indicating that spare capacity often exists within occupied tee times rather than unfilled slots.

**Key takeaway:** Growth has come from increased participation within a broadly stable tee-time framework, not from significant changes in the number of tee times that are available.

#### 2. Occupancy Remains Stable – With Notable Shifts by Course

Occupancy (the proportion of tee times with at least one player) has remained relatively stable overall, increasing from 67% in 2022 to 73% in 2025.

However, this stability masks meaningful distributional changes:

- Championship courses (Old, Castle, New, Jubilee) have shown consistently high occupancy with limited variation year on year.
- The most significant increases have occurred on Eden, Strathtyrum and Balgove, with Balgove occupancy rising from 30% to 53% between 2022 and 2025.
- These shifts align with entry-level access, junior participation, and development-focused programmes.

**Key takeaway:** Eden-side courses are absorbing a growing share of demand, supporting participation growth without overloading championship courses. This shift suggests growth is being accommodated through redistribution across the courses rather than additional peak-time supply.

#### 3. Long-Term Growth in Rounds Played

Looking across a longer timeframe (2019–2025):

- Rounds fell sharply in 2020 and 2021 due to Covid-19, followed by a strong recovery in 2022.

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- Major Championships (The Open in 2022, AIG Women's Open in 2024) moderated headline growth, yet total rounds still increased overall.
- Since 2022, around 30,000 rounds per year have been played in dark times, highlighting demand beyond standard daylight capacity.

**Key takeaway:** Demand is resilient and continues to expand even when capacity is constrained.

## 4. Balance Between Visitors and Yearly Ticket Holders (YTH)

The overall balance between YTH and visitor play has remained broadly stable:

- In 2025, the split returned to 50% YTH / 50% Visitor, the most balanced year since 2019 (excluding Covid-impacted years).
- Since 2019:
  - Visitor rounds have increased by approximately 9% (c137k to c150k).
  - YTH rounds have increased by approximately 27% (c117k to c150k).
- While visitor rounds were c150k in 2025, 13% of these rounds were played by YTH guests and 25% of these rounds were played as casual visitor rounds (booked within 24 hours of the tee time).
- Visitor and YTH split looks stable overall, but it shifts depending on season
  - Winter and shoulder months are predominantly YTH-led.
  - Peak season (April–September) sees a visitor majority.
  - Early morning and late evening times are heavily YTH-utilised.
- During peak months May to August compared to 2023 and 2024 there has been a **20% increase in YTH rounds from c49k to c59k**

**Key takeaway:** The annual visitor/YTH split looks stable, but the balance comes under the most pressure in peak season when visitor demand is strongest and managing local access requires the most active shaping. Local play is supported through protected windows and predictable seasonal/time-of-day patterns (early/late and shoulder months). While YTH exclusive times has resulted in increased YTH play during peak months, further analysis is required to increase occupancy and utilisation of YTH times.

## 5. Yearly Ticketholder Growth and Changing Behaviour

Between 2019 and 2025:

- Total YTH increased by 15% (6,902 to 7,972).
- Junior/youth tickets increased by 66%.
- This growth across YTH is translating into higher participation.
- Resident rounds increased by 27% between 2022 and 2025 while resident numbers remained broadly static.

**Key takeaway:** Growth in YTH rounds is driven more by frequency of play than by volume of new tickets alone.

## 6. YTH Exclusive Times: Capacity Opportunity

In 2025:

- YTH Exclusive times operated at 69% occupancy and 46% utilisation.
- Around 7,500 tee times in these periods were unoccupied.
- There is capacity for approximately 50,000 additional rounds within this structure, which is the equivalent of c950 rounds per week or c135 rounds per day.

**Key takeaway:** There is meaningful headroom within protected local access periods.

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## 7. Demand Pressure: The Old Course as a Case Study

Demand indicators show the clearest pressure point on the Old Course:

- Ballot applications increased by 77% between 2019 and 2025. This is mirrored in both local and open ballots
- Applications increased by 50% between 2022 and 2025 alone.
- Success probability has stabilised at around 24% since 2022, despite rising demand.

**Key takeaway:** Overall balance is stable, but peak demand for premium experiences is intensifying.

## 8. Overall Conclusions

Taken together, the data shows that:

- Participation and utilisation are rising across the system.
- Access for locals is structured, protected, and increasingly well-used.
- The visitor/local balance remains stable overall.
- The primary change is demand intensity, particularly:
  - At peak times
  - On championship courses
  - Within constrained booking windows.