



MAXIMISING THE COMMUNITY BENEFITS OF GOLF

FINAL REPORT

NOVEMBER 2024

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MESSAGE FROM THE CHAIR

It is my honour to introduce the **Maximising the Community Benefits of Golf Report** for 2024 on behalf of the Australian Golf Industry Council (AGIC), as its Chair.

This report builds on our 2023 demonstration of golfs significant contribution to Australians every year, to provide practical and tangible keys to success and learnings from within our industry and help all golf venues around our great country become the best versions of themselves and in doing so, create a healthier, happier and more sustainable community.

On behalf of the AGIC, I wish to express our sincere gratitude to SGS Economics & Planning for their continued leadership assisting our industry to tell our story better. Our appreciation and thanks extends to the 16 venues who contributed to this engaging report, your shared knowledge and experience is invaluable in our quest to achieve more Australians playing more golf.

Golf is in an extraordinary time of growth, and together we can maximise the ensuing benefits for a strong and resounding future.



Karen Lunn
Chair, AGIC
CEO, WPGA Tour of Australasia



The **Australian Golf Industry Council (AGIC)** was established in 2006 as a group comprising the key national bodies of the golf industry in Australia, designed to work together for the common good of the game and the industry.

Through the three peak bodies in the PGA of Australia, Golf Australia and WPGA Tour of Australasia, the industry has never been as united as off the back of the inaugural Australian Golf Strategy (2022-2025) and this newly commissioned report.



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01 Introduction

Introduction

The Strategy for Australian Golf (2022-2025) is integral in the momentum that golf currently enjoys. Together as leading industry partners, the Australian Golf Industry Council (AGIC) members are committed to producing evidence and insights that drive the industry to create, enhance, transform and sustain spaces and places that allow more Australians to play more golf.

The [2023 Community Benefits of Golf in Australia Report](#), summarised to the right, demonstrated that golf is big, different from other sports in positive ways, and is changing with new venue types attracting a more diverse player demographic.

To extend the application of the 2023 report, the AGIC commissioned this report to provide the information and tools to help golf venue operators enhance the value of their venue to members and the broader community – in other words to **maximise the benefits of golf venues**.

Themes of successful golf venues, key findings and case studies were developed after engaging with 15 golf operators across Australia and undertaking desktop research. The themes are broad in nature and apply to golf venues to varying degrees based on venue type, size, quality, location, owner and governance arrangements, membership base, financial circumstances and other attributes.

This report is a call to action, encouraging all golf venue owners and managers to consider their venues attributes and identify and act on infrastructure, programmatic and operating changes to become the best version of themselves. Some high-level information to aid venue owners and managers to implement ideas inspired by this report is provided in **Appendix A**.

<p>\$3.3 billion</p> <p>Total annual benefits of golf</p>	<p>\$1.4 billion</p> <p>The value of golf's economic benefits each year. These benefits accrue to golf players, golf related businesses (including tourism related), golf workers, and the health sector.</p>	<p>\$1.0 billion</p> <p>The value of golf's social benefits each year. This accrues mainly from physical and mental health benefits (around \$860m of benefits annually), with around \$149m associated with the local amenity of golf courses.</p>	<p>\$890 million</p> <p>The value of golf's environmental benefits each year through biodiversity, flood and stormwater protection, water filtration and purification, carbon sequestration and urban cooling.</p>
<p>7.23 million</p> <p>More than one third of Australian adults (37%) visit a golfing venue for meals, drinks and various social, leisure and business activities every year.</p>	<p>\$10.3 billion</p> <p>Annual household expenditure on golf activities and golf venues in Australia. \$6.7b of this is by expenditure of golf players and community members in their local area, and the remaining \$3.6b is associated with golf tourism.</p>	<p>1,603</p> <p>Places to play golf across Australia. Made up of 431 9-hole courses, 922 18-hole courses, 53 27-54 hole courses, 184 driving ranges, 115 mini golf courses, and a growing number of indoor simulators and venues.</p>	<p>280 million</p> <p>The kilometres that Australian golfers collectively walk each year playing golf. This equates to over 7,000 laps of the Earth's equator each year.</p>
<p>7.1%</p> <p>Improved subjective health and wellbeing of on-course golfers when compared to non-round golfers. Club members scored 78.4 (+15.2%) and round players scored 68.4 (+5.2%) compared with an average score for Australian adults of 63.2 (out of 100).</p>	<p>3.5 million</p> <p>Number of Australian adults (aged 18-79) who play various formats of golf. It comprises around 2.2m on-course golfers (golf club members and round players) and 1.3m people who play alternative formats of golf only (driving range, simulator, mini golf).</p>	<p>1.75 million</p> <p>Estimated number of overnight trips made each year for the purpose of playing golf. Of this, 1.6m are domestic overnight trips (driving and flying), and over 150,000 are made by international visitors.</p>	<p>21.3</p> <p>Average number of on-course golf games played each year by golf members and round players. 2.21m players amass more than 47m rounds of golf every year.</p>

Introduction

The report is delivered in the following sections for readers to follow through and move to key components to inform their own venue journey:

Chapter 2

provides a high-level overview of the economic, social and environmental benefits which can be generated by golf venues.

Chapter 3

details several key and recurring themes which were found to be at the heart of benefit-maximising golf venues. This section explores these themes, with examples of how venues have implemented and driven benefits through these themes.

Chapter 4

outlines key learnings applicable by golf venue type – golf course, short course, mini golf, outdoor driving range, and indoor venues.

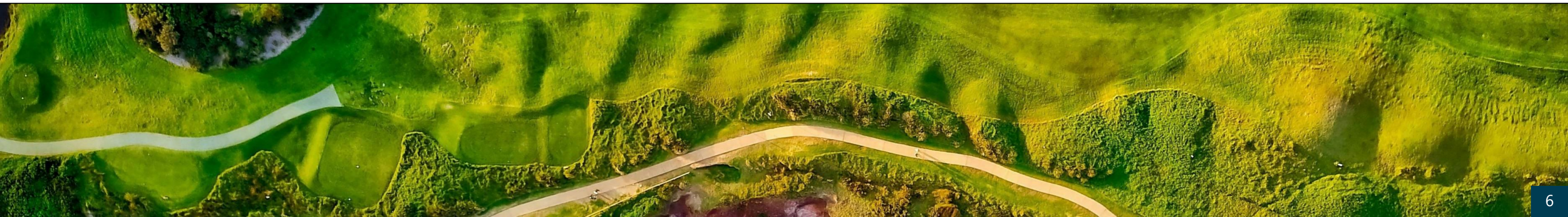
Chapter 5

provides a summary of the case studies used to inform the report.

Appendix A

provides a high-level step-by-step of how to plan for and deliver upon the insights and practical information in this document.

In addition to this report, a **dashboard** was developed ([accessible via this link](#)) which enables golf venue operators to **input attributes of their venue** to calculate its economic, social and environmental benefits generation each year. It is anticipated that such information will support golf venue operators in engaging with stakeholders in government and the private sector, as well as club and community members. A user guide for the dashboard is provided in **Appendix B**.



02

Overview of the
benefits of golf

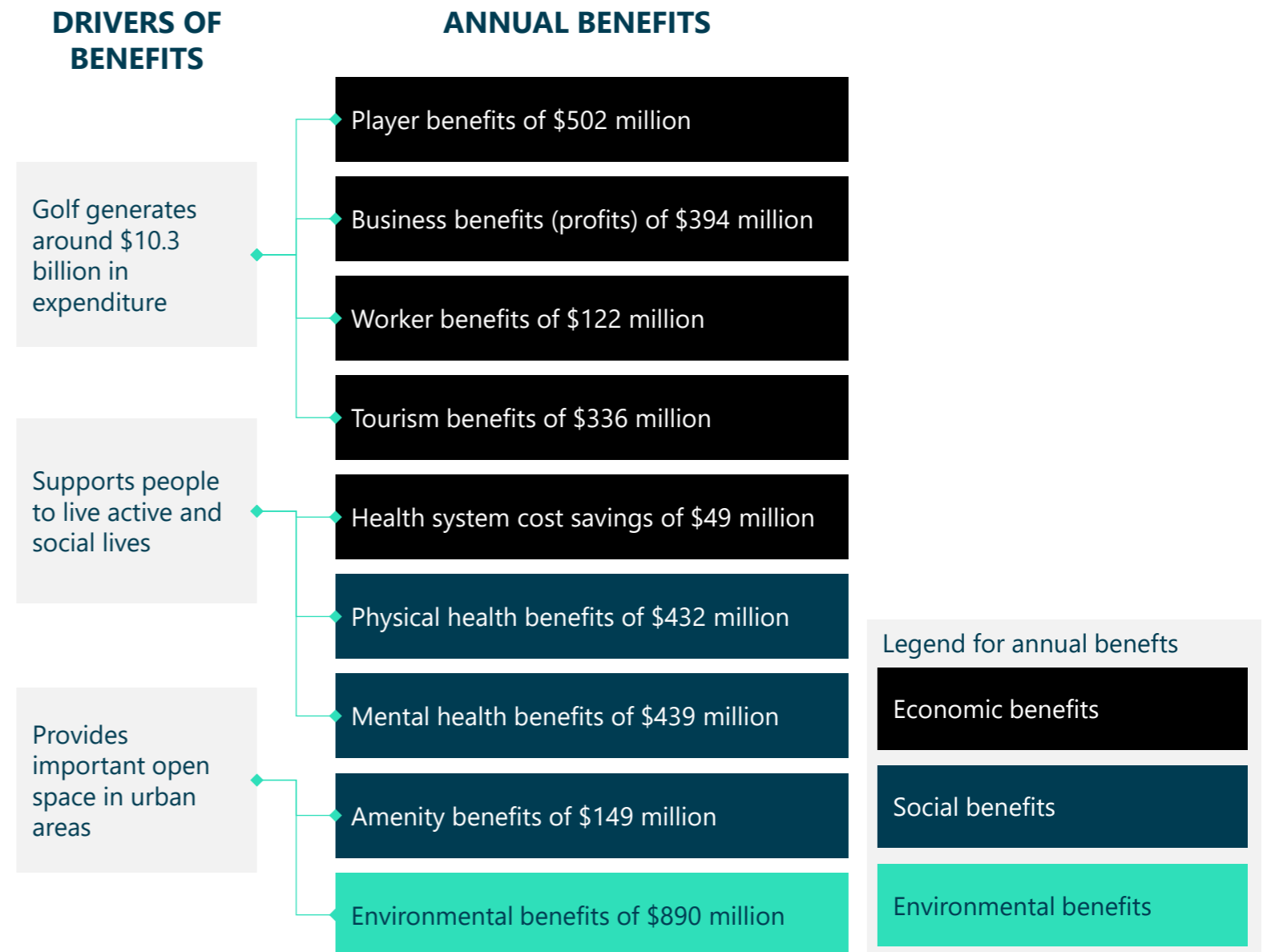
Overview of the benefits of golf

Golf is one of the largest sports in the country and generates important benefits for golfers and the Australian community.

The values to the right evidence that golf activities generate important benefits for golfers and the Australian community. The type and scale of benefits are driven by the unique factors of golf:

- Total expenditure associated with **golf is larger** than that of other leisure/ sport activities. For example, cycling in Australia is associated with \$6.3 billion in annual expenditure, while recreational fishing is associated with \$3.4 billion in annual expenditure. At \$10.3 billion of associated expenditure, golf is similar in size to JB HiFi (by annual revenue), and around half the size of Qantas and Telstra.
- Many golfers base their holidays around golf, which is in high contrast to other leisure/sport activities. Around one-third of total household expenditure on golf is associated with golf tourism.
- As a moderate-intensity and long-form of activity, golf supports good **physical and mental health** for people of all ages.
- With vegetation that is, on average, more complex and diverse than that of public parks, golf provides important amenity and environmental benefits to surrounding communities.

The economic, social and environmental benefits are described more on the following pages.



Overview of the benefits of golf

ECONOMIC BENEFITS \$1.4 billion

There are many nuanced reasons why people choose to engage with golf but ultimately they do so because they derive value from the sport. More than \$10.3 billion in household expenditure is spent on golf annually.

- Beyond membership fees, green fees and entry fees, **Australian golf players** derive a collective additional benefit of \$502 million per annum. Across the more than 57 million individual episodes of golf participation each year, this works out as a benefit of \$8.80 per activity.
- \$394 million in annual benefits for **Australian businesses** are accrued. This benefit is the total estimated profit of businesses derived from golf-related expenditure.
- \$122 million in benefits for **industry workers** each year, which reflects higher levels of employment and higher wages than would be expected in a scenario where the golf sector did not exist.
- \$336 million in benefits flowing from **golf related tourism**.
- \$49 million in **avoided health system costs** due to golf supporting a healthier society, given it is a long-format, moderate-intensity form of physical exercise.

SOCIAL BENEFITS \$1 billion

The social benefits of golf include physical and mental health benefits that accrue to golf players, and neighbourhood benefits resulting from the high amenity of golf courses. The physical health benefits of golf stem from golf helping participants to be physically 'active' as opposed to 'inactive'. Mental health benefits are generated by the same outcome, along with the social interaction and time spent outdoors because of golf.

- 166,000 Australians are physically active but would be inactive without golf. Daily, Australian golfers walk a combined 19.2 laps of the Earth's equator.
- Annual **physical health benefits** accruing from golf sum to \$423 million. This equates to an average annual physical health benefit of around \$190 per golfer.
- Annual **mental health benefits** which accrue to golfers sum to \$439 million. This equates to an average annual benefit of around \$200 per round golfer.
- The **neighbourhood amenity benefit** of golf is valued at \$149 million each year, reflecting the observed lift in land prices surrounding golf courses.

ENVIRONMENTAL BENEFITS \$0.9 billion

Golf courses have a critical role in providing important environmental benefits, especially in urban areas where green space is limited.

Academics at the University of Melbourne undertook an assessment of golf course biodiversity, and found:

- The structural complexity of vegetation on golf courses is around 50-100% higher than that of residential gardens and urban parklands.
- Beetle and bug abundance on golf courses is 6-10 times greater than that within nearby parks.
- Bee species richness on golf courses is around 3-4 times that of remnant heathlands.
- There are around 50% more bird species on golf courses than in urban gardens and parks.

The value of specific environmental benefits include:

- **Flora and fauna biodiversity:** \$354 million annually.
- **Urban cooling:** \$257 million annually.
- **Flood and stormwater management:** \$159 million annually.
- **Water filtration and purification:** \$114 million annually.
- **Carbon sequestration:** \$6 million annually.

Further details of these benefits can be found in the [**2023 Community Benefits of Golf in Australia Report**](#).

03 Themes of successful golf venues

Introduction

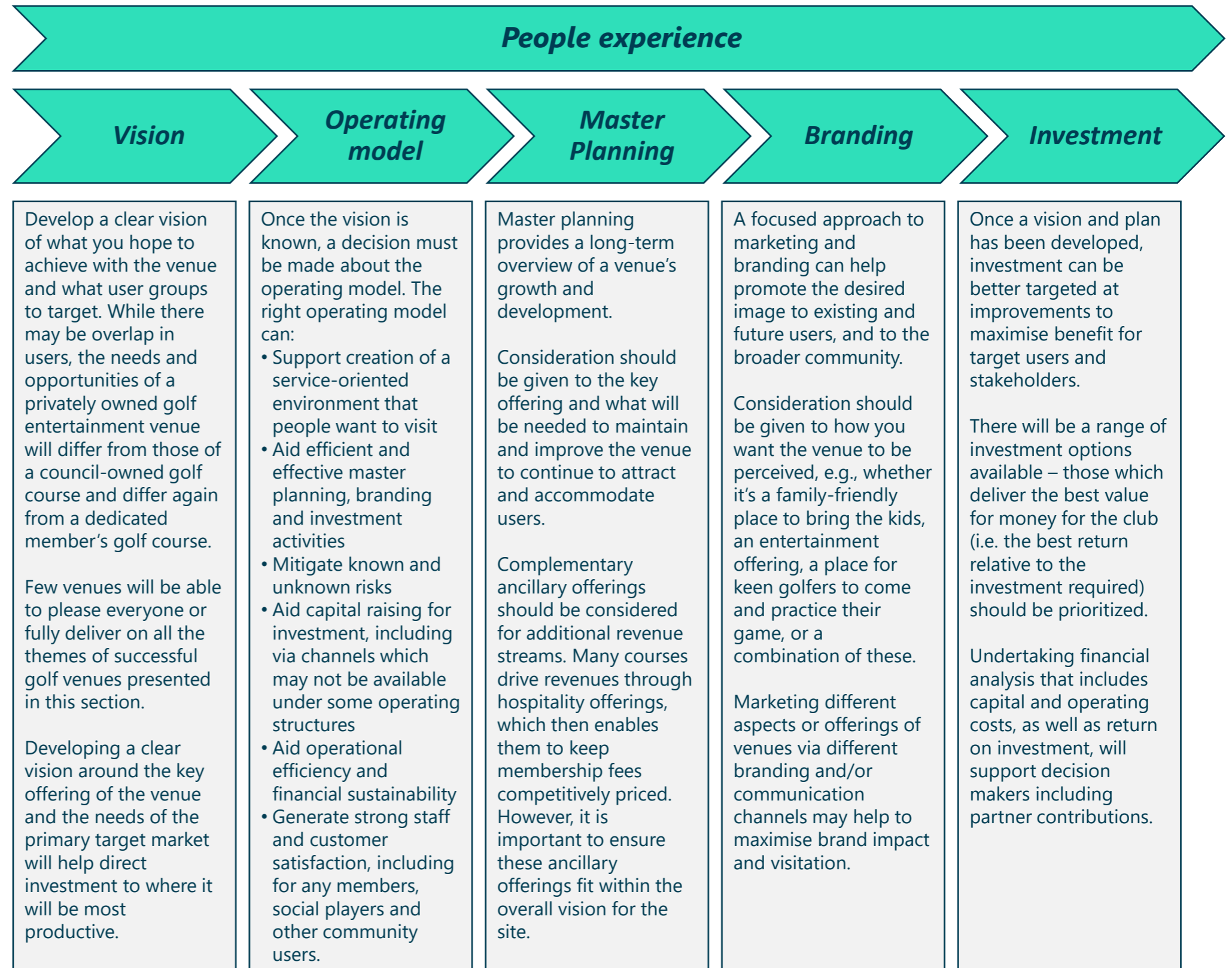
Several key and recurring themes appear to be at the heart of benefit-maximising golf venues. This section explores these themes, with examples of how venues have implemented and driven benefits through these themes.

The themes and examples presented in this section are not intended to inform a simple 'pick and choose' approach to investment and operational changes for golf venue operators.

Understanding a venue's key market and purpose is an essential first step in future planning. Developing a **vision, master plan** and **brand**, with consideration of the **visitor experience** at each of those stages, must come before investment.

Further detail of the process is to the right and other things to consider in implementing ideas inspired by this report is provided in **Appendix A**.

While the framework is vital for large scale venue development initiatives, it should (or parts of it at least) also inform more smaller-scale changes to programming or customer serviced based initiatives (i.e. those initiatives that can be readily implemented).



Themes of successful golf venues

Ten benefit maximising themes emerged through consultation with golf venue operators.

Introduced below and described in further detail on the following pages, the themes are **not** presented in any order of importance. The themes will apply to venues to varying degrees based on venue type, size, quality, location, owner and governance arrangements, membership base, financial circumstances and other attributes.

- 1 Promoting participation and visitation through diverse venues.** For golf's image to continue to evolve, tried and proven innovative approaches to attracting new visitors to play golf must be more broadly rolled out across Australia. This includes the construction/development of new venues which appeal to new/beginner players, as well as the expansion of golf formats and ancillary service offerings at existing venues.
- 2 Establish a welcoming culture and a workforce that is engaged and service-oriented.** Establishing a more diverse, engaged and service focused workforce can improve workplace culture (benefits for workers) and improve the visitor experience for all (benefits for visitors). Considering people, who they are and how they will experience your venue, is critical.
- 3 Overcoming barriers with shorter formats and flexible pricing.** Shorter formats have grown in popularity and have helped attract new golfers to the game, particularly those short on time who wish to play during the week. Some golf courses have seen or are expecting to see more than a doubling of rounds played following the introduction of a short course to complement their current offering. Such an outcome helps the financial sustainability of golf clubs and can fund the expansion of supporting offerings to enhance member and community value.
- 4 Tailor offerings for targeted player groups.** While themes 1, 2 and 3 can attract new players, sometimes more targeted programs and interventions are necessary to attract new demographic groups. Programs and interventions may focus on kids, women, beginners, seniors, people with a disability and multicultural communities, and may seek to attract new players at non-peak times to smooth venue demand.
- 5 Technology can enhance player experiences and utilisation and dramatically increase venue revenue.** Emerging technology, such as ball tracking software, offers new ways for existing golf enthusiasts to engage with the game, and more social and interactive pathways for new players to enter the game. Back-end technology enhancements such as online booking systems can also aid visitor turnover and improve the visitor experience, which increases repeat visitation and venue revenue.
- 6 Maximise social benefits via initiatives that deliver social interaction and participation.** At a minimum, golf courses offer an opportunity for friends, colleagues and family to come together and socialise over a round of golf. While this offers appreciable benefits to players, the social experience can be enhanced through the addition of ancillary offerings and events, some of which may serve broader community groups.
- 7 Generate revenues through hospitality offerings.** As golf venues look to become more inclusive and social, they can drive visitation through diverse hospitality offerings. Even for some successful golf venues with high golf course utilisation, food and beverage offerings still generate around half of the overall venue revenue.
- 8 Champion quality environments for players, community and ecosystems.** Positive environmental outcomes need not be standalone initiatives. Rather, initiatives that aim to improve the visitor experience and venue quality – such as landscaping, native vegetation planting, course maintenance, recycling and reuse – support golf's positive contribution to the environment.
- 9 Package experiences with business partners.** Golf venues can form part of a wider sports and entertainment offering in a region. Capitalising on this to increase revenue for golf venues and other businesses can generate wider community benefits.
- 10 Resourcing change and rewarding risk.** Change is hard, however, clubs that have been open and responsive to change have been able to deliver innovations that benefit the venue and the community. This applies to all types of golf venues, no matter the governance structure or location.

Theme 1: Promoting participation and visitation through diverse venues

Golf venues with a range of offerings will generate pathways for new people to experience the game. Linkages between different golf formats and ancillary services can help drive visitation.

Golf venues can maximise their pathways to participation by considering the range of offerings that might fit within their site. For many golf clubs, a full-sized golf course is their key offering. However, having a driving range, putting green, or mini golf course can help attract new users through the door. These new users may only ever engage with a secondary offering, or they may go on to become keen golfers after getting a taste for the game.

Golf venues can also explore opportunities to create or promote synergies with other golf operators, even if not accommodated on the same site. Short courses and indoor venues often see visitation by users who have never engaged with golf before. Partnerships and cooperation between feeder golf venues and full-sized golf courses can help drive visitation across both sites. Beginner players may first try out golf at short courses or indoor driving ranges, and then progress to outdoor driving ranges and full-sized golf courses once they've had time to build confidence and hone their skills.

Venues should also consider what ancillary services may complement a golf offering. A quality food and beverage offering can attract new users to a site, especially when integrated with a social golf offering, such as mini golf or an indoor simulator. Golf courses are often aesthetically designed, with trees, water and landscaped green space. This can be an appealing outlook, even for non-golfers, and dining venues which take advantage of this may attract more visitors.

Case studies

- **Wembley Golf Course** has seen participation driven through visibility. Families come for lunch at the restaurant and to take their kids to the playground, but often end up staying longer to use the mini golf course or driving range. This has especially driven participation by families and kids, and has led to increased enrolment in junior competitions and lessons.
- **Curlewis Golf Club** has seen different users be enticed to the Club for different venues. The mini golf course attracts families, while the driving range has helped bring in corporate groups and people who want to try out golf without becoming a member. Other offerings, such as indoor golf simulators and foot golf, have been a good add-on for corporate groups and functions. A diverse food and beverage offering complements all golf-related activities and serves to attract non-golfers.
- **Pacific Golf Club** introduced a mini golf course and enhanced hospitality offerings. These offerings drive appreciable revenue from non-members which contributes to venue maintenance and, in doing so, help to keep membership fees low.



Source: Pacific Golf Club Instagram



Source: Curlewis Golf Club Instagram

Relevance of theme to delivering the benefits of golf:

Player Benefits	Business Benefits	Worker Benefits	Physical Health Benefits
Mental Health Benefits	Amenity Benefits	Environmental Benefits	Other Benefits

Relevance of theme to golf venue type:

Golf Course	Short Golf Course	Mini Golf Course
Outdoor Driving Range	Simulator/Indoor venue	

Theme 2: Establish a welcoming culture and a workforce that is engaged and service-oriented

Establishing a service-oriented and engaged workforce has been a consistent success-driver for golf venues by helping to introduce and retain new entrants to the game.

Golf venues which promote a welcoming and inviting atmosphere have seen success in attracting new participants to the game, especially women, kids and novice golfers. Golf venues have achieved this in several ways, including:

- Employing friendly and approachable staff
- Inclusion and integration of food and beverage or other social spaces.
- Beginner-friendly golf options, including beginner lessons and a range of difficulties in course design.
- Family-friendly venues and events.
- Relaxed dress standards.
- Marketing themselves as accessible, fun and inclusive.

An engaged workforce is a big contributor to the atmosphere cultivated at a golf venue. Attracting and retaining the right workers will help promote a venue as friendly, welcoming or fun. Having a diverse workforce (people of various ages, sexes and backgrounds) can help make a venue appeal to a range of users and further break down the perception that golf is only for a certain demographic. Workers are often a player's first point of contact at a golf venue and can help set the tone of a user's experience.

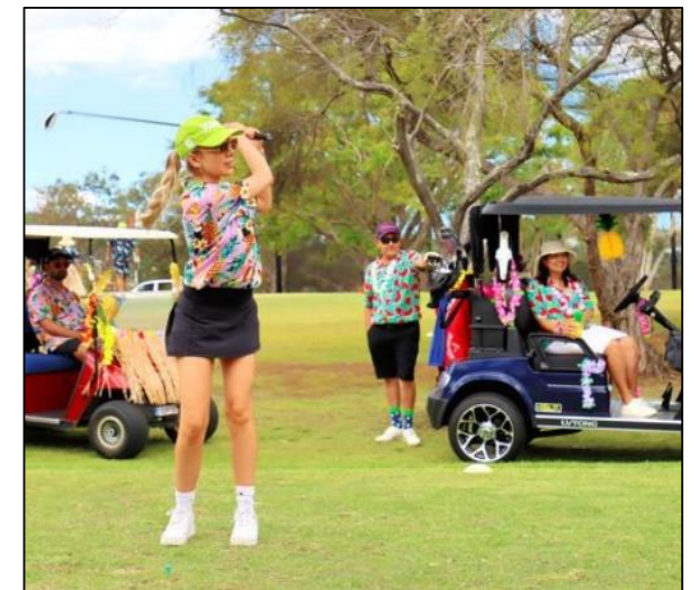
Similarly, marketing can play a big role in how a venue is perceived. Promoting a fun, family-friendly image (or a different image which aligns with the vision of a venue) through advertising and social media can change how golf is perceived by community members, while engagement with schools and other local groups can help attract attention.

Case studies

- **Wembley Golf Course** has sought to promote a fun and welcoming atmosphere, in part through relaxed dress standards and event days, such as their 'Paws n Pars' day which allows golfers to bring their dog with them onto the course.
- **Pacific Golf Club** brought on a full-time marketing manager to help with shifting their image and rebranding. Social media was used to portray the club as fun and family-friendly, and attendance at school fetes helped connect with kids and boost junior memberships. A focus on a positive staff culture and employee incentives also saw customer satisfaction rise and led to reduced staff turnover.
- **Golf Space** has targeted members play with staff every third Thursday. This increases staff engagement with customers and creates opportunities for members to meet new people. Fostering a positive relationship between members and staff can also help create brand loyalty.



Source: Wembley Golf Club Instagram



Source: Pacific Golf Club Instagram.

Relevance of theme to delivering the benefits of golf:

Player Benefits	Business Benefits	Worker Benefits	Physical Health Benefits
Mental Health Benefits	Amenity Benefits	Environmental Benefits	Other Benefits

Relevance of theme to golf venue type:

Golf Course	Short Golf Course	Mini Golf Course
Outdoor Driving Range	Simulator/Indoor venue	

Theme 3: Overcoming barriers with shorter formats and flexible pricing

Shorter formats have grown in popularity and have helped attract new golfers to the game, especially younger players and women. Increasing accessibility for users, including through short formats and flexible pricing, can help to overcome barriers to entry.

As people face competing demands on their time, shorter formats of golf can be appealing. Short formats, including 9-hole courses and pitch and putts, allow players to engage with golf without having to set aside half a day. This can appeal to potential new and existing participants for different reasons:

- Potential new players might be eager to try out golf but are intimidated by the commitment and formality of an 18-hole course.
- Existing players, who regularly play 18-hole golf on weekends but do not find time for such a format during the week, may be enticed to play shorter formats during the week if such an option is available.

Several courses have had success in introducing short formats of golf alongside their current golf course offering. These shorter formats typically offer cheaper green fees, have more relaxed dress standards and allow larger groups to play together. Anecdotally, some golf courses that have introduced shorter formats of golf have seen around a doubling of golf rounds played.

Short formats appeal to novice and younger players who might be more focused on the 'fun factor'. Short formats are also a feeder for 18-hole golf, allowing players to hone their skills and then progress onto an 18-hole course once they've built up confidence.

Flexible pricing, such as off-peak or beginner memberships, can help attract players during less busy times and give prospective new players a chance to try out a venue before committing to a full membership.

Case studies

- **Shortees Golf** offers a shortened golf format that acts as a feeder for 18-hole golf, with many patrons coming to the venue having never swung a golf club before. These players can hone their skills and then progress to a full-sized course when they've built up confidence.
- **Regency Park** is a 9-hole course which has had success with removing barriers to entry and appealing to those who might not typically engage with golf. Low entry costs, family passes, the addition of a short course tee, and mid-week discounts for members have helped drive visitation, while relaxed dress standards and allowing groups of six to play together has helped to create a social and fun atmosphere.
- **Maroochy River Golf Club** currently contains a challenging 18-hole championship golf course which is near capacity, with around 85,000 rounds played per annum. The membership base however is above the industry average. There are plans to construct a 9-hole executive short course and a 9-hole par 3 course under lights, which will dramatically increase capacity for rounds played and is likely to attract a younger demographic to become members.



Source: Regency Park Golf Instagram.



Source: Shortees Golf Instagram.

Relevance of theme to delivering the benefits of golf:

Player Benefits	Business Benefits	Worker Benefits	Physical Health Benefits
Mental Health Benefits	Amenity Benefits	Environmental Benefits	Other Benefits

Relevance of theme to golf venue type:

Golf Course	Short Golf Course	Mini Golf Course
Outdoor Driving Range	Simulator/Indoor venue	

Theme 4: Tailor offerings for targeted player groups

Golf venues can use targeted programs and offerings to attract new demographic groups.

Targeted programming can play a vital role in attracting a new generation of players, as well as introducing golf to people who might not otherwise encounter the sport. These can include:

Kids: As described in theme 1, numerous golf courses have introduced a mini golf course to attract kids and families. Various 'stepping stones' can then aid progression to other golf formats. This includes interactive driving ranges (see theme 5) as well as junior clinics and competitions to get kids to improve their skills. Tailored offerings for kids should be focused on fun, interactive activities to keep engagement levels high.

Women and girls: Leagues and clinics specifically for women and girls can help make golf feel more welcoming and accessible. Female coaches and group classes are important to removing barriers to feeling welcome. Programs that accommodate varying schedules and which are combined with opportunities for social interaction tend to enjoy most success.

Beginners: Beginner lessons and low-pressure tournaments or events can help to attract new players to the game. Short or alternative golf formats can help new players get a feel for golf before progressing to an 18-hole course.

Seniors: Golf typically attracts an older demographic, and clubs can maximise visitation by senior players by ensuring they continue to be accommodated. Senior-specific social events, discounts on food and beverage, and discounts on golf cart hire can encourage return visitation by senior players.

People with a Disability: Venue design and discounted or free entry for carers, service providers and those with a companion card can help to attract visitation for people living with a disability. Golf is inclusive by design, making it a much-loved activity of choice. Equipment like the ParaGolfer, along with trained coaches and programs will make venues more accessible and inviting.

Case studies

- **Maroochy River Golf Club** has the largest junior program in Queensland. Junior members can compete in Club competitions and take part in a junior competition against other golf clubs. The programs teach kids the skills of the game, and are equally built around making friends, building social skills and having fun.
- **Chirnside Park Country Club** includes a mini golf course which was built flat and disability-friendly by design. The Club sees lots of carers come in looking for an activity to do which is accessible for people living with a disability. With an older player demographic at their golf course – Gardiner’s Run – the Club also offers discounted golf carts for older members to support them playing golf for longer.
- **Curlewis Golf Club** offer a Women’s Pathway Program which starts with a free ‘come and try’ day, followed by beginner clinics, lessons with PGA professionals, and a 6-month mini membership. This allows women interested in golf to test their skills, learn alongside other women, and try out membership before choosing whether to make a commitment to full membership.



Source: Maroochy River Golf Club Instagram.



Source: Golf Australia.

Relevance of theme to delivering the benefits of golf:

Player Benefits	Business Benefits	Worker Benefits	Physical Health Benefits
Mental Health Benefits	Amenity Benefits	Environmental Benefits	Other Benefits

Relevance of theme to golf venue type:

Golf Course	Short Golf Course	Mini Golf Course
Outdoor Driving Range	Simulator/Indoor venue	

Theme 5: Technology can enhance player experiences and utilisation and dramatically increase venue revenue

Modern technology has seen the emergence of new ways to engage with golf. Golf venues should consider where technology can be used to enhance their offering.

Indoor simulators allow players to practice their game year-round, regardless of outdoor weather conditions. For these venues, having fit-for-purpose technology is a key part of their offering, allowing players to analyse their shots or enabling social competitions with friends.

Outdoor driving ranges have also seen significant benefit from the inclusion of ball-tracking technology and auto-ball dispensers, increasing convenience for users and allowing players to better analyse their shots. Even some mini golf courses have seen success from the inclusion of ball-tracking technology, which sees players earning points based on how they play.

Back-end technology enhancements can also improve the user experience. Online booking systems, mobile apps, and social media engagement can help participants to engage with the venue and make it easy for them to book a game.

Social media and content creation is playing a significant role in introducing new people to the game, with a soaring culture online that can extend to venues. Particularly evident in attracting younger players.

Understanding the target market – whether keen golfers looking to hone their skills, social players looking for fun with friends, families looking for kid-friendly activities, or a combination of these – is key to assessing the type of technology required and will help venues make targeted technology investments.

Case studies

- Swing City Golf** has a semi-enclosed driving range, where radar-based ball tracking is key to enabling players to understand shot outcomes. In keeping with their social atmosphere, the technology also allows users to play a variety of interactive games and virtual courses in competition with friends. Swing City Golf advised that their 60 metre enclosure was selected based on thorough research; it allows people to get a sense of the ball flight and increases trust in what the technology shows beyond the 60 metres. A driving bay booking system is central to maximising visitation and revenue at Swing City Golf; it secures bay time, prevents too many people waiting at a given time, and moves people through the bay faster than they otherwise might.
- Wembley Golf Course** already had a popular driving range when they decided to introduce Trackman technology. Since then, its become the busiest driving range in the country, with 26 million balls hit from the range in 2023, forecast to hit 31 million balls in 2024. The new technology was brought in to provide continued and greater value for money for users.



Source: Swing City Golf Instagram.



Source: Moore Park Golf Course Instagram.

Relevance of theme to delivering the benefits of golf:

Player Benefits	Business Benefits	Worker Benefits	Physical Health Benefits
Mental Health Benefits	Amenity Benefits	Environmental Benefits	Other Benefits

Relevance of theme to golf venue type:

Golf Course	Short Golf Course	Mini Golf Course
Outdoor Driving Range	Simulator/Indoor venue	

Theme 6: Maximise social benefits via initiatives that deliver social interaction and participation

Over 80% of golfers consider golf venues to be important for social connection. Venues which provide opportunities for social connection and integration will maximise the benefits delivered to players.

For some, golf is their main means of social interaction. Especially among older and retired players (a demographic group among whom golf tends to be particularly popular), golf can be a primary driver of their weekly interaction with friends. For others, golf venues act as a site for a day out with friends, a date night, or an activity for the kids.

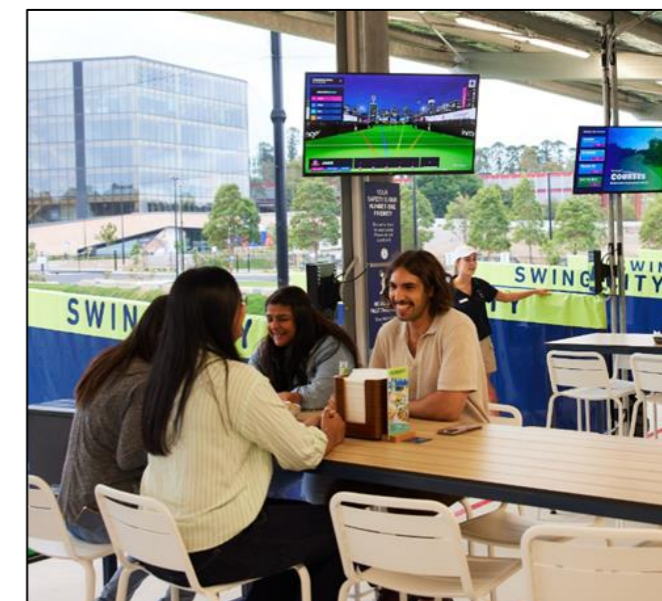
Golf venues can maximise the social benefits they generate by ensuring there is space and opportunities for users to increase their social interaction. This could include clubhouses with dining areas, lounges, and bars where participants and guests can relax, socialise, and enjoy meals together. These spaces serve as hubs for social activity.

Golf leagues or friendly competitions can also create social opportunities, fostering camaraderie and team spirit among participants, as well as allowing participants to meet new people and grow their social network.

Some golf venues have seen success in hosting free or low-cost community events, often in partnership with local council or local businesses. These could include easter egg hunts, mothers/father's day events, wine and dine events, outdoor movie events, or school-holiday programming. Other venues have enhanced opportunities for active social interaction via the implementation of free to use table tennis tables, lawn games, arcade games and other low-barrier access free activities.

Case studies

- **Swing City Golf** includes tables or lounges at each bay of their 40-bay driving range, allowing participants to easily chat, eat and drink with each other. The food and beverage offering is fully integrated with the driving range, allowing users to order food and drinks directly to their table. This all serves to create a social atmosphere and eases social interaction between groups attending together. Swing City also hosts a parent's group on a Monday during a traditionally quiet time which raises the venue's profile with a segment of the community that may otherwise not engage.
- **Regency Park Golf** host community events on the golf course, including a free easter egg hunt (which attracted 1,200 kids in 2024), food truck nights, petting zoos, and 'Touch a Truck' days. Many of these are run in partnership with local businesses and/or council and are free or low-cost for attendees. These events act as marketing for the golf course, while delivering social benefits to the community.
- **X-Golf** run X-league, a competition format where teams of 3 compete over 10 weeks for a range of prizes. The competition provides an opportunity for mid-week social interaction and is an experience where participants can achieve and try something new.



Source: Swing City Golf Instagram.



Source: Regency Park Golf Instagram.

Relevance of theme to delivering the benefits of golf:

Player Benefits	Business Benefits	Worker Benefits	Physical Health Benefits
Mental Health Benefits	Amenity Benefits	Environmental Benefits	Other Benefits

Relevance of theme to golf venue type:

Golf Course	Short Golf Course	Mini Golf Course
Outdoor Driving Range	Simulator/Indoor venue	

Theme 7: Generate revenues through hospitality offerings

As golf venues look to become more inclusive and social, they can drive visitation through quality hospitality offerings, including dining services, bars and accommodation.

Dining services and bars/lounges: Offering breakfast, lunch, and dinner options can keep patrons on-site for longer and drive revenue through food and beverage sales. A well-run restaurant can become a destination in its own right, attracting golfers and non-golfers to the venue. Having space to host functions, theme nights, happy hours, or other events can also help to attract more visitors and increase awareness of a venue and its offerings.

Multiple stakeholders with strong hospitality offerings engaged throughout the project stated that around 50% of all revenue received by their venue is associated with their hospitality offerings, with the remainder coming from golf-related activities

Accommodation: Golf clubs offering on-site accommodation, or partnering with nearby accommodation providers, can attract out-of-town visitors. Creating packages that include accommodation, meals, and golf – such as stay and play packages - can further attract tourists and boost revenue.

Member benefits: Offering special dining privileges or discounts on food and beverages for members can enhance the value of memberships and encourage ancillary spending.

Functions: Offering packages for groups, such as golf tournaments with catering or accommodation, can attract larger parties and generate more revenue. Hosting corporate events, birthday parties, and weddings can also generate revenue through function space rental and food and beverage sales.

Case studies

- **Curlewis Golf Club** includes Claribeaux, a French fusion restaurant which has become a dining destination in its own right. The restaurant overlooks the greens of the golf course but isn't limited to attracting golfers. Open for breakfast, lunch and dinner, the restaurant attracts guests from around the Bellarine through its separate website, which is important for attracting those who would otherwise not consider visiting a 'golf course restaurant'. With function space for up to 300 guests, Claribeaux can also be used for events, including corporate events and weddings. The restaurant also operates in tandem with Curlewis's accommodation offering as part of Dine & Stay packages.
- **Pacific Golf Club** has a clubhouse restaurant and beer garden which is open to golfers and the general public. The Club drives food and beverage revenue through social memberships, weekly specials, and live music on weekends. The dining and drinking areas are also used as function spaces for corporate events and kids' parties.



Source: Curlewis Golf Club Instagram.



Source: X-Golf Instagram.

Relevance of theme to delivering the benefits of golf:

Player Benefits	Business Benefits	Worker Benefits	Physical Health Benefits
Mental Health Benefits	Amenity Benefits	Environmental Benefits	Other Benefits

Relevance of theme to golf venue type:

Golf Course	Short Golf Course	Mini Golf Course
Outdoor Driving Range	Simulator/Indoor venue	

Theme 8: Champion quality environments for players, community and ecosystems

Golf courses can improve environmental outcomes through initiatives that also enhance the visitor experience.

Golf courses which are well-designed and maintained will deliver a quality experience for players, as well as provide significant ecological advantages. For example, courses with native trees and wildlife corridors will support diverse ecosystems, providing habitats for native plant and animal species. When the grassland on golf courses is well-maintained, it will also contribute to carbon sequestration and urban cooling benefits.

There are many ways golf courses can maximise their environmental benefits, including:

- Tree and shrub planting, particularly when focused on drought-tolerant and regenerative native species and habitat creation.
- Planting native and drought-tolerant grass varieties that require less watering.
- Seeking opportunities to recycle water.
- Considering environmental initiatives for parts of the course that are not utilised, e.g., beekeeping has been introduced on several courses, delivering environmental benefits and creating saleable honey.

An ecologically-friendly course will not only deliver environmental benefits but will improve the user experience and contribute towards positive perceptions of golf clubs. Golfers enjoy playing on courses that are well-designed and aesthetic, and a considered approach to landscaping and biodiversity can enhance this. Additionally, community support for golf will increase if golf courses act and demonstrate how they protect and promote the natural environment.

Case studies

- **Maroochy River Golf Club** created a wetlands as part of the site, choosing vegetation that would assist in managing birdlife and water quality. The Club has seen lots of native birds nest in the area, with bird watchers often parking near the course. Water quality testing has also revealed that water coming out of the course is of higher quality than water in the Maroochy River. The course is on the boundary of the Maroochy River and used to be a sugarcane plantation. Since being converted to a golf course, the soil quality has improved noticeably.
- **Wembley Golf Club** has introduced several environmental initiatives, including beekeeping on unutilised parts of the course, planting of tree species to support native wildlife, and recycling of water used in washing buggies and other equipment.
- **Pacific Golf Club** has a pollination project and has undertaken significant tree planting, creating screening areas with native trees. Around 3,000 trees exist across a 15,000 sqm area.
- **Moore Park Public** protects and regenerates the threatened Eastern Suburbs Banksia Scrub, connecting local First Nations Peoples to culture and intergenerational care for country.



Source: Pacific Golf Club Instagram.



Source: Maroochy River Golf Club Instagram.

Relevance of theme to delivering the benefits of golf:

Player Benefits	Business Benefits	Worker Benefits	Physical Health Benefits
Mental Health Benefits	Amenity Benefits	Environmental Benefits	Other Benefits

Relevance of theme to golf venue type:

Golf Course	Short Golf Course	Mini Golf Course
Outdoor Driving Range	Simulator/Indoor venue	

Theme 9: Package experiences with business partners

There are opportunities for golf venues to generate synergies with complementary businesses.

Golf venues often form part of a wider sports and entertainment offering in a region. Partnerships with complementary businesses can create mutually beneficial opportunities.

Other golf courses: In popular golf tourism regions, players often visit with the intention of playing rounds at multiple golf courses. Packaged golf experiences, such as 'Stay Two, Play Two' deals, can help boost visitation across multiple golf courses.

Short courses and driving ranges can also benefit from relationships with established golf courses. Players at these venues are often beginner golfers or don't have the time to make a golf club membership worthwhile. Through arrangements with golf clubs, these venues can offer frequent players the opportunity to play rounds on full-sized golf courses (e.g., once per month). This adds value to memberships and drives visitation.

Tourism and hospitality: Collaborations with nearby accommodation providers can be used to offer package deals that include golf rounds, accommodation, transport, and/or dining.

Retail: Relationships with golf equipment retailers can create co-location benefits for both businesses.

Consider other partners that may derive shared value can also increase success. This could include government, education and community organisations, whose focus is on healthy, active and socially connected communities, environment and economies.

Case studies

- **Curlewis Golf Club** has become a key player in the Bellarine tourism market, offering package deals with neighbouring wineries, other golf clubs, and other tourist operators. With an on-site accommodation offering, Curlewis offers accommodation and transport to people staying in the region, including guests for weddings hosted at nearby vineyards. Dining packages see overnight guests get a cheaper deal when paired with dinner at nearby Jack Rabbit, while some overnight guests also get deals on transport to and from the Q Train. Stay Two, Play Two deals help to further develop the Bellarine region as a golfing hot spot, with some guests staying at Curlewis and visiting multiple golf courses in the region.
- **Golf Space** takes members to premium outdoor golf courses once per month. This adds value for Golf Space members as they get to play on courses they might otherwise not. It also provides incentive for members to keep working on their golf skills. Golf Space hopes to extend the offering in the future through packaged golf holidays for members.
- **Matagarup** has combined low and high octane experiences in their model and located them in a sport and entertainment precinct that creates mutual benefits for all operators.



Source: Curlewis Golf Club Instagram.



Source: Jack Rabbit Vineyard Instagram

Relevance of theme to delivering the benefits of golf:

Player Benefits	Business Benefits	Worker Benefits	Physical Health Benefits
Mental Health Benefits	Amenity Benefits	Environmental Benefits	Other Benefits

Relevance of theme to golf venue type:

Golf Course	Short Golf Course	Mini Golf Course
Outdoor Driving Range	Simulator/Indoor venue	

Theme 10: Resourcing change and rewarding risk

Clubs that have been open and responsive to change have been able to deliver innovations that maximise benefits to the venue and the community.

Golf courses face a range of challenges around their continued operation, including financial pressures and, for council-owned venues, debate over the best use of public land. While some golf courses have been forced to close, others have been able to overcome challenges through innovation and by being open to new commercial opportunities.

Resourcing future change may be done with consideration of the themes and success stories presented above. However, a clear vision and an appreciation of market opportunities must be established prior to investment and stakeholder engagement is critical. Some golf venues are better placed to deliver on some themes than others, for example:

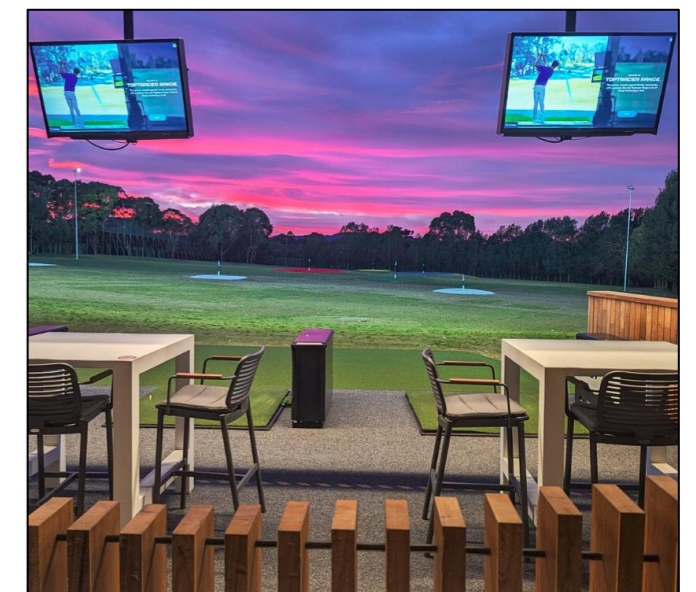
- Although people travel long distances to play 18+ hole golf courses, they are less inclined to do so to hit balls at a driving range or play mini golf only. Venues with a moderate-high population living close to the venue are more likely to be able to generate an appreciable uplift in visitation via investment in driving range technology or a mini golf venue.
- Shorter golf formats may be difficult to implement for established metropolitan courses with limited expansion space. That said, reconfiguration of existing courses to shorter lengths or short course formats may drive increased visitation while also freeing up land for new golf initiatives (e.g. driving range, mini golf), commercial opportunities (e.g. lease land as per the Pacific Golf Club case study, or improved hospitality offerings), or broader community infrastructure (e.g. pump tracks, playgrounds, landscaped gardens, community centres, etc. which supports the community while promoting interaction with golf opportunities).

Case studies

- **Morack Public Golf** and Whitehorse Council worked together to redevelop the venue, adding a new mini golf course and redeveloping the driving range and pavilion. The partnership between Council and the venue's new operator was key to delivering successful outcomes.
- **Gardiners Run Golf Course** relocated from Chirnside Park to neighbouring Lilydale (3 kilometres away). Most of the old site was sold to residential developers to fund the new golf site, however, part was retained for the Chirnside Country Club. Now split across two venues, the offering better serves golf members and community members.
- **Pacific Golf Club** was approached by Reside Communities in 2017 with a proposal to develop a retirement village on land leased from the Club. Through this arrangement, Pacific Golf Club was able to construct a new clubhouse, a mini golf course, putting green and a driving range is in development.
- **Little Para** had the backing of local council to construct new infrastructure and implement a range of initiatives to attract new players. While this was a risk for a council owned venue, it has appreciably increased the benefits for golf players and the community.



Source: Pacific Golf Club Instagram.



Source: Morack Public Golf Instagram.

Relevance of theme to delivering the benefits of golf:

Player Benefits	Business Benefits	Worker Benefits	Physical Health Benefits
Mental Health Benefits	Amenity Benefits	Environmental Benefits	Other Benefits

Relevance of theme to golf venue type:

Golf Course	Short Golf Course	Mini Golf Course
Outdoor Driving Range	Simulator/Indoor venue	

04

Key findings & practical
recommendations by
venue type

Key findings & practical recommendations by venue type

The past few years have seen all forms of golf grow in popularity across Australia. Quality venues, low barriers to entry, and diverse golf offerings are key to driving visitation.

Golf's booming popularity began during the COVID-19 pandemic when people were looking for ways to spend more time outdoors. Since then, participation in golf has continued to grow as players enjoy all the benefits that the game has to offer.

The following pages detail key findings derived from case studies of each golf venue type (golf courses, short golf courses, mini golf, outdoor driving ranges, and indoor golf). To this end, the themes in the previous section of this report are extended upon with an aim to provide practical recommendations that help guide venue managers and landowners to maximise visitation and benefit-generation.

This is intended to be a general guide for venue operators, as there is a limit to how specific and practical these recommendations can be. Each venue operates in its own environment and will be subject to localised market conditions and financial constraints. Therefore, the following recommendations may not be reasonable or practical for every venue.

Venue operators should contact Golf Australia to discuss localised opportunities for improvement and investment. Golf Australia has visibility and understanding of the golf environment across Australia and is, therefore, well-placed to provide guidance on operational and programmatic changes, and investments to generate new revenue streams.

The Professional Golf Association (PGA) of Australia and its members, working in golf management and as Professionals (coaches), are a valuable resource focused on building workforce capability and diversification, as golf continues to try and meet the needs of all participants the sport is trying attract and moving people along the participant journey.

Key lessons of relevance

- **Key lesson 1: Consider opportunities to diversity the offering**
 - Golf venues with a diverse offering see different user groups visit for different venues. For example, families might visit for mini golf, while corporate groups visit for the driving range or indoor simulator. Hospitality offerings – such as a restaurant, beer garden, bistro, function space, or in-house accommodation – will also attract different visitors. Visibility has also been shown to drive visitation – users visiting a golf venue for mini golf may see use of the driving range or 18-hole course and come back to give it a go. Where possible, consider where underutilised space could be used to diversity the offering on-site. Contact Golf Australia to discuss localised opportunities.
- **Key lesson 2: Look for ways to become involved with the local community**
 - Involvement in community events and programming can help promote golf venues, while also delivering benefits to local residents. Venues have had success hosting easter egg hunts, petting zoos, movie days and sports days, among others. One stakeholder explained the positive impacts of community engagement as follows:
"Our community events are great - they serve the community, get them on side of the golf course, and act as marketing to bring new golfers into the venue – it's a win for the community and a win for club engagement and finances"
- **Key lesson 3: Remove barriers to entry by actively promoting a welcoming and friendly atmosphere**
 - Breaking down barriers to entry will make golf more accessible to novice players and help bring in a new generation of players. There are several ways that venues can remove barriers to entry, including through marketing, relaxed dress standards, targeted programming, and fun events (e.g. bring your dog to golf days).
- **Key lesson 4: Introduce programs to attract underrepresented and new players**
 - Targeted programming can help attract new and underrepresented cohorts of players – lessons and pathways targeted at beginners, women and kids can help introduce the game to new people.

Golf course

Golf courses are the foundation of the game, but expectations are changing, bringing opportunities for golf courses to diversify and increase their impact.

Key finding 1: Golf courses can be the foundation for a diverse entertainment offering.

- Golf courses will always be the main attractor for golf clubs, but additional entertainment offerings – such as shorter or alternative golf formats – can deliver synergies which drive visitation and break down barriers to entry.

Key finding 2: Golf courses are important community hubs.

- Golf attracts keen players who often seek social connection and a sense of community. Through tailored memberships, clubhouses, events and competitions, golf courses can act as social hubs for the local community, both golfers and non-golfers using the venue for social connection.

Key finding 3: There are numerous avenues golf courses may take to improve financial sustainability.

- Golf courses have high maintenance requirements, and it can be challenging to meet these requirements while keeping membership and green fees accessibly priced. However, golf courses have several avenues to improve financial sustainability, from external investments to revenue from ancillary services.

Practical recommendations

- **Introduce programs to attract underrepresented and new players:** Targeted programming can help attract new and underrepresented cohorts of players – lessons and pathways targeted at beginners, women and kids, multi-cultural communities, can help introduce the game to new people. Venue operators should consider their existing user base with regards to their vision and identify immediate and short-medium term programs to better align users with the venue's vision.
- **Undertake gap analysis of activity and entertainment offerings in the region:** Knowing where gaps exist in the local market and the level of unmet demand in the community will help guide future investment decisions. More so than any other venue type, golf courses can provide a diverse range of hospitality offerings, from fine dining, to cafes and kiosks.
- **Consider opportunities for underutilised land:** This could include opportunities to lease unused land on an ongoing basis or use the land for environmental initiatives, potentially in partnership with other organisations and/or the relevant local council.
- **Retain local presence if relocating:** Numerous golf venues have relocated over previous decades. Most sold their site in full to support the relocation, however, the Gardiners Run and Chirnside Park Country Club case study highlights that retaining a presence at the initial site can enhance venue benefits and financial sustainability.
- **Add a par 3 tee on the course:** To provide an easier format of play for novice players and those who are unable or uninterested in playing a full-length course.
- **Engage with Golf Australia to discuss localised opportunities:** Golf Australia is well-placed to provide guidance on investments and possible new revenue streams.

Image source: Maroochy River Golf Club website.



Short golf course

Short courses are becoming more popular and can be complementary to golf courses, as opposed to competition or a detractor from the primary offering.

Key finding 1: Short courses can act as a feeder for golf.

- The short course format allows novice players to learn the game and hone their skills in a quicker, more affordable, and less intimidating venue. Unlike driving ranges, mini golf or putting greens, short courses offer players an opportunity to drive, chip and putt, and, therefore, provide a more complete golfing experience that draws people into the game.

Key finding 2: As a more compact form of golf, it is viable for short courses to offer greater flexibility in hours of operation and increased flexibility of use.

- It is commercially viable for short golf courses to offer golf under lights to attract the after-work crowd (given the smaller space to light compared to 18+ hole courses), and to enable larger groups to play together. The shorter format means more golfing activity is viewable from a clubhouse/ restaurant, which supports use of the venue for corporate and social events.

Key finding 3: Short golf courses can drive visitation through targeted events and programming.

- The tighter hole configuration creates more social play opportunities, which can make it attractive as a venue for events.

Practical recommendations

- **Consider the length of the short course and adjust if beneficial to do so:** Short courses can range from something like Shortees (with holes between 38 and 88 metres in length) to more standard Par-3 courses (typically with holes between 60 and 200 metres in length). It is possible that a shorter format may better appeal to existing and potential users, which could free up space for other uses; for example, additional golf offerings, other commercial activities, or other land uses which may provide benefits to the golf course and/or the community.
- **Establish ancillary offerings that appeal to the target user base:** A tired clubhouse and lack of ancillary offerings can limit venue use. Investing in the venue and providing supporting offerings (e.g. food and beverage, free yard games, etc) can lead to an uptick in users.
- **Look for ways to become more involved with the local community:** Short courses can be great community event spaces. Venues have had success hosting easter egg hunts, petting zoos, and sports days, among others. A site with lights and speakers throughout the venue can host even more event types; for example, movie nights, food truck nights, music events, and more. Such events can directly and indirectly increase the venue's revenue while also serving the community.
- **Introduce programs to attract new players:** Short courses are well-placed to appeal to new players through targeted programming. Lessons and pathways for beginners, women and kids can help introduce the game to new cohorts.
- **Consider opportunities to partner or work with other golf venues:** As a feeder for golf participation, there is opportunity for short golf courses to work more with golf clubs to organise games and/or events at full-sized courses.

Image source: Little Para Instagram (left); Shortees Golf Instagram (right)



Mini golf course

Mini golf courses focused on accessibility, fun and social interaction attract a diverse range of visitors and complement other golf formats.

Key finding 1: Well-designed and challenging mini golf courses boost visitation.

– Mini golf course designs which mirror golf courses, in both aesthetics and challenging putting techniques, helps attract visitors looking for a less 'gimmicky' experience than a stereotypical putt putt.

Key finding 2: Accessibility is important in attracting diverse participants, particularly families and people living with a disability.

– Mini golf courses haven't proven to be an accessible activity for families with young kids, older persons, and people living with a disability. Accessible design and pricing choices, such as flat flooring and free entry for those holding companion cards, has helped to make mini golf an inclusive sport.

Key finding 3: Mini golf complements other golf and entertainment offerings.

– As a format centred around social interaction and fun, and with relatively small space requirements, mini golf courses have seen success in co-locating alongside other entertainment offerings, including other golf formats. Several stakeholders noted that the addition of a mini golf course boosted revenue by over \$500,000 each year, with minimal additional running costs beyond the initial capital investment.

Practical recommendations

- **Utilise landscaping and course design to attract players:** Mini golf may be smaller and more casual than golf courses, but course design is nonetheless an important part of the offering. Mini golf courses which have been designed to mimic a full-sized golf course, with aesthetic appeal (including beautifully landscaped gardens) and a range of difficulties in putting techniques, have seen success in driving visitation.
- **Integrate food and beverage offering, and market it for different audiences:** Mini golf is primarily a fun and social activity. Integrating a food and beverage option with the course is a good way to attract and retain players, and increase revenue through F&B sales. One stakeholder noted: *"We anticipated a dwell time of 60 minutes, but the high amenity of the venue and the food and beverage offering is seeing people stay for around 90 minutes. This isn't detracting from speed of play – people are just enjoying the space outside of playing mini golf"*.
- **Include a function space for corporate and group hires, and market it to different audiences:** Mini golf is a popular group activity. Inclusion of designated function space (even if just an outdoor space) will allow groups to book corporate events, bucks/ hens nights, kids birthday parties, and other similar events. Marketing efforts may be segmented to attract children and families during the day (e.g. hosting kids parties), and corporate group events and groups of adults at night (e.g. by serving alcohol and meals).
- **Implement variable pricing to maintain utilisation throughout the week:** As a popular group activity, mini golf can be busy on weekends and school holidays. Variable pricing to attract younger children, all abilities groups, and other demographics during the week can smooth visitation demand.

Image source: Puttz Instagram (left); Matagarup Instagram (middle); Shanx Instagram (right)



Outdoor driving range

Outdoor driving ranges have seen visitors respond positively to improvements in technology, food and beverage offerings, and convenience.

Key finding 1: The right technology can enhance the user experience.

- Ball-tracking technology, automated ball dispensers and interactive range games can enhance the user experience and attract new and repeat visitors. Bay booking technology can provide players with assurance of play while limiting play time, thereby increasing bay turnover and venue revenue.

Key finding 2: Integrated food and beverage options can drive visitation and revenue.

- F&B is becoming an increasingly large part of entertainment offerings. Driving ranges which allow players to order food and drink to their bay will see users spending more and transition to other offerings within the venue (e.g. to yard games, mini golf, restaurants or any other offering within the venue).

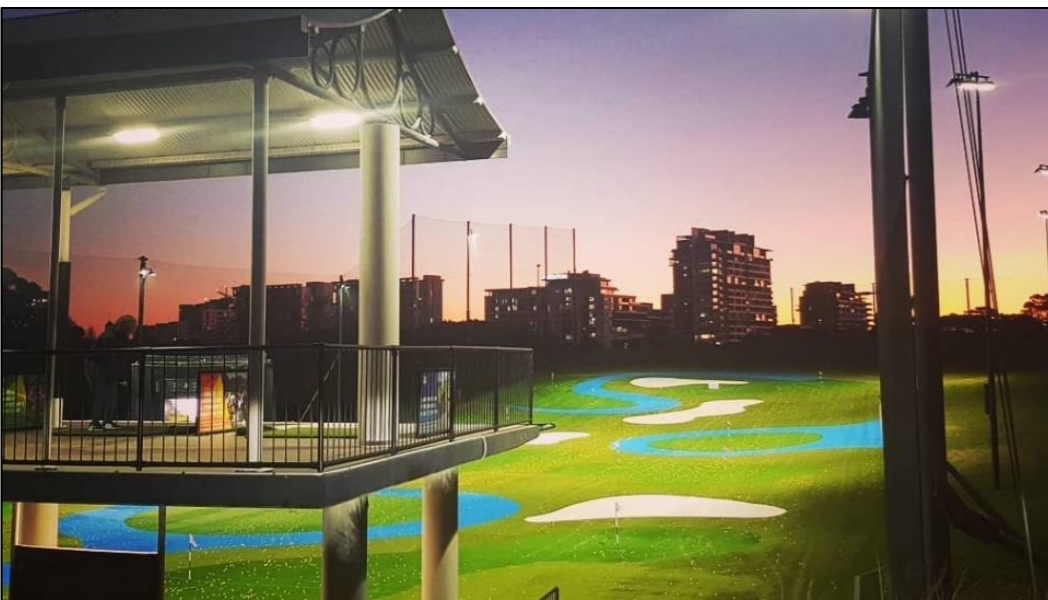
Key finding 3: Driving ranges can appeal to both social players and avid golfers looking to improve their game, but the target user should be known.

- Driving ranges support golfers to practice their shots and analyse their performance, and provide a place for friends, couples and families to socialise. Operators need to understand and consider trade-offs with attracting these different user groups in the design and marketing of their venues.

Practical recommendations

- **Integrate food and beverage offering:** Integrating food and beverage with the driving range is a good way to attract and retain players, as well as increase revenue through F&B sales. This could include allowing players to order food and drink to their bay on the range and including seating and table space for convenience.
- **Include function space for corporate and group hires:** A driving range is a popular group activity. Inclusion of designated function space will allow groups to book space for corporate events, bucks/hens nights, kids birthday parties, and other similar events. These spaces should ideally be serviced by a food and beverage offering, such as catering or an option to order at an in-house restaurant or bar.
- **Integrate technology into the offering to enhance the user experience:** Ball-tracking technology has proven highly popular at driving ranges, giving players more information about their play-style and shot outcomes, as well as innovating the length of driving ranges by utilising netting and reduces the footprint required.
- **Provide bay booking technology on the website:** Bay booking capability can aid turnover of bays. This recommendation is most applicable at driving bay venues which are at or near capacity.
- **Provide ancillary offerings and infrastructure, some of which may be free of charge:** Ancillary offerings, such as free yard games, table tennis tables, soft play areas, playgrounds, picnic tables, and others can increase the value that users derive (and so increase overall visitation numbers), while also increasing spending on F&B offerings.

Image source: Moore Park Instagram (left); Swing City Instagram (middle and right)



Simulator/indoor venue

Indoor venues offer a blend of golf practice and fun entertainment, attracting both avid golfers and social players.

Key finding 1: Indoor simulators can be a means for serious players to improve their game.

- Indoor simulators provide the means for players to analyse and improve their performance. As technology improves, the role of indoor simulators in coaching and practice is likely to increase.

Key finding 2: Social interaction can be maximised through targeted competitions and events.

- Indoor golf competitions have been successful in fostering social connection and wellbeing. Due to being indoors and generally located in urban areas, indoor golf venues can offer league-like competitions during the week and in all weather conditions. This kind of regular social outing has positive impacts on mental wellbeing, providing an avenue for people to socialise and building comradery through competition.

Key finding 3: Integrated food and beverage options can help drive visitation and revenues.

- Indoor golf venues which allow players to order food and drink to their bay will see users staying longer and spending more.

Practical recommendations

- **Implement innovative competition formats:** League-like competitions provide an avenue for regular social interaction, which helps to improve the wellbeing of players and encourages repeat visitation and ongoing spending. Implementing innovative social competitions on certain nights can help drive revenue and deliver value for players. School leagues are another avenue to drive visitation in off-peak times.
- **Consider opportunities to partner or work with other golf venues:** Indoor golf is a good way for players to practice their game and allows players the ease and convenience of playing indoors and close to home; however, it is an inherently different experience to golf on a course. There is opportunity for indoor venues to work with other golf clubs to organise games or events at courses – this adds value for members of the indoor venue and drives visitation across both indoor and outdoor golf venues.
- **Integrate food and beverage offering:** As with all other golf venue types, integrating food and beverage is a good way to attract and retain players, as well as increase revenue through F&B sales.
- **Include function space for corporate and group hires:** Indoor golf can be a popular group activity. Inclusion of designated function space will allow groups to book space for corporate events, bucks/hens nights, kids birthday parties, and other similar events. These spaces should ideally be serviced by a food and beverage offering, such as catering or an option to order at an in-house restaurant or bar.

Image source: Golf Space website (left); X Golf Instagram (middle and right)



05 Case study summaries

Case studies

The table below outlines the case study venues that informed the development of the themes outlined above in section 3. Learnings from interviews with Golf Space and Glen Waverley Golf Club also contributed to the above sections.

Each of these case studies are described in further detail sequentially on the following pages.

Case study venue	Applicability to venue type					
	Golf course	Short golf course	Mini golf course	Driving range	Simulator/ indoor venue	F&B (as a standalone attractor)
Wembley Golf Course – Perth, Western Australia	2 x 18-hole	Planned		Inc. ball tracking technology		Diverse offerings for differing markets
Regency Park Community Golf Course – Adelaide, South Australia	1 x 9-hole			Planned		
Little Para Golf Course – Adelaide, South Australia		1 x 9-hole				
Matagarup Mini Golf – Perth, Western Australia						
Curlewis Golf Club – Bellarine Peninsula, Victoria	1 x 18-hole			Inc. ball tracking technology		Diverse offerings for differing markets
Maroochy River Golf Club – Sunshine Coast, Queensland	1 x 18-hole	Planned				
Chirnside Park Country Club and Gardiners Run Golf Course – Melbourne, Victoria	1 x 18-hole					
Swing City Golf – Sydney, New South Wales						
Pacific Golf Club – Brisbane, Queensland	1 x 18-hole	1 x 9 hole		In development		Diverse offerings for differing markets
Shortees Golf – Terrey Hills, New South Wales		1 x 18-hole				
X Golf – Approx. ~30 franchise venues across Aus & NZ						
Moore Park Golf Course – Sydney, New South Wales	1 x 18-hole			Inc. ball tracking technology		
Morack Public Golf – Melbourne, Victoria	1 x 18-hole			Inc. ball tracking technology		

Wembley Golf Course – Perth, Western Australia

Wembley Golf Course is one of the busiest in Australia. Its success is underpinned by a strategy to attract a diversity of golfers and non-golfers by offering numerous entertainment offerings and diverse pathways for people to engage with golf.

Wembley Golf Course is one of the big success stories in Australian golf. Its location helps – it is located in a residential area <10 kilometres from the city centre – although this is just one part of its success. Other golf courses similarly positioned to city centres across Australia have not been able to generate the same community benefit as Wembley Golf Course. Wembley Golf Course provides examples of how similarly positioned and similarly governed golf courses may maximise community value.

Wembley Golf Course is managed as an ‘entertainment venue’ that considers all other forms of leisure and entertainment as competition. It is not managed purely as a ‘traditional golf venue’.

The management approach at Wembley means that a wide range of market opportunities (including events) are explored, many of which are complementary and some of which target non-golfers, **yet all provide exposure to and pathways into the various formats of golf.**

With nearly 70 staff aged 18 to 82, visitors of all ages feel welcome and supported at Wembley Golf Course, whether they visit to play golf or just for the ancillary hospitality and leisure offerings.

There is community pride in the golf course, due in part to the diverse offering provided to the community and the dividend that the course provides to local council (over \$2 million each year which is used across other services and cost savings).

Features of Wembley Golf Course:

- Estimate 1 million+ visitors per annum, ~800,000 playing golf ~200,000 visiting for other reasons (playground, café, etc)
- Golf playing venues open from sunrise to 8pm, 7 days a week, attracting visitors from across Perth
- 2 x 18 hole public golf courses with membership opportunities, supporting around 200,000 rounds per year
- 18 hole mini golf, designed to be a scaled-down version of full-size golf course
- Double storey, 80-bay driving range with Trackman technology, enabling over 30 million balls to be hit annually (Trackman led to a 20% increase in balls hit at the range, from 26 million last year to being on track for 31 million this year)
- Adult, junior and women specific coaching sessions (women sessions are led by a full time female PGA coach)
- Free practice putting and chipping areas
- Numerous hospitality offerings (fine dining, kiosk and bar, several of which are attractors in their own right)
- Relaxed dress code
- Playground and landscaped lawn area open to non-golfers, providing a high amenity green space for the community
- Active marketing of programs and events to drive visitation
- Tree planting with the specific aim of supporting native bird and bee species
- #1 date spot in Perth supported by the above features.



Source of images: Wembley Golf Course Instagram page

The success of this golf venue is supported by its alignment with the following themes

Theme 1	Theme 3	Theme 5	Theme 7	Theme 9
Theme 2	Theme 4	Theme 6	Theme 8	Theme 10

Wembley Golf Course – Perth, Western Australia

The quantified benefits of Wembley Golf Course each year.

Economic benefits - comprising benefits for players, businesses, workers, and the health sector

How economic benefits are maximised:

- Attractors for young and old, from the playground and mini golf for younger demographics, to the driving range for all age groups and the golf courses for (typically but not exclusively) adults
- Nurturing golf environment comprising free putting green and pitching area, as well as 'free to try' days and paid coaching sessions for various demographic groups. This increases pathways for beginners and young people to enter the game of golf
- Ability to book driving range puts a time limit on how long people stay, supporting a high level of use at peak times. Investment in Trackman technology also saw an appreciable uplift in users
- The pro shop with simulator aids golfers to buy equipment suited to their golfing needs and style
- 4 points of sale are necessary to provide fast and appreciated customer service

Social benefits – comprising physical and mental health benefits and neighbourhood amenity benefits

How social benefits are maximised:

- Various events for the golfing and broader community members, such as 'Paws n Pars' day whereby people can play golf with their dog
- The playground and hospitality offerings are estimated to support around 200,000 non-golf visitors each year
- The integration of the site supports long dwell times and social interaction; it is a meeting place for the community, not just a golf course
- Marketing initiatives aim to attract atypical users in traditional 'non-peak' times; e.g. aged care residents to the mini golf course during business hours, supporting their physical and mental health
- Focus on accessibility to support people with a disability, including supporting the blind golf association championship, all abilities coaching classes, and an \$80,000 investment into an Paragolfer machine to help people in wheelchairs to stand

Environmental benefits – comprising benefits related to biodiversity, urban cooling, flood and stormwater management, water filtration and carbon sequestration

How environmental benefits are maximised:

- Wembley Golf Course has a silver waterwise golf course status from the WA Department of Water due to its initiatives to recycle and retain water on site, and is working towards a 'gold' status
- Initiatives include extensive planting of native drought tolerant tree and shrub species to attract endemic fauna
- Solar panels are featured on site, and many lights have been converted to more efficient LEDs
- Bee keepers are provided access to part of the site not used by golfers. This is a commercial operation but supports pollination of flora on site and across the neighbourhood

Regency Park Community Golf Course – Adelaide, South Australia

Regency Park Community Golf Course, owned by the City of Port Adelaide Enfield and managed by GreenSpace Management, offers a diverse mix of events that aim to increase the value generated for golfers and the broader community.

Located just north of the Adelaide CBD, Regency Park Community Golf Course contains a 9-hole public golf course and SHANX - an 18-hole mini golf course.

GreenSpace Management has an innovative and community-centric “people before profit” management philosophy, while also striving to improve the golfing experience for golf enthusiasts.

Through this focus on **community and players**, GreenSpace Management has set a new benchmark for how small but well-positioned council-owned golf venues can be operated to enhance their community value.

During consultation, GreenSpace Management emphasised that the financial success and community outcomes of Regency Park Community Golf Course would not have been possible without the City of Port Adelaide Enfield’s support of GreenSpace Management to take risks necessary to grow their impact.

GreenSpace Management Director, Peter Vlahandreas says: “The biggest shift in our demographics has come since we opened SHANX. We believe that this amenity is exactly what ‘traditional golf’ venues need if they have a strategic desire to change or expand upon existing demographics at their venue as well as welcome more unique users to the location... Our focus is on community, not necessarily golf which means that we welcome everyone to our venue.” (Inside Golf article, January 2024).

While SHANX is excellent as a mini golf course, **it is also central to the hosting of numerous free community events**, all of which enhance value to the community while raising the profile of the golf course and attracting new players who do not fit the stereotypical golf demographic. Without SHANX, many of the free community events would not be as successful.

Features of Regency Park Community Golf Course:

- 9-hole golf course with dual tees for an 18-hole configuration and short tees to provide an easier playing experience for young people and beginners
- A relaxed dress code and minimal rules, designed to reduce barriers to play
- SHANX Mini Golf course added in 2021, attracting over 50,000 new users to the venue in its first year of operating
- Separate branding for the 9-hole public golf course and the mini golf course, considered beneficial for diversifying the types of visitors who come to the site
- Numerous free community events, many of which are planned around school holidays and to align with broader community events (e.g. Adelaide Fringe Festival)
- Membership packages and season pass pricing option for frequent players, with discounts for women and families
- Tuition and clinics open to all, with specific focus on children, beginners and women.



Source of images: Regency Park Instagram page

The success of this golf venue is supported by its alignment with the following themes

Theme 1	Theme 3	Theme 5	Theme 7	Theme 9
Theme 2	Theme 4	Theme 6	Theme 8	Theme 10

Regency Park Community Golf Course – Adelaide, South Australia

The quantified benefits of Regency Park Community Golf Course total \$1.5 million each year.

\$723,000

Economic benefits - comprising benefits for players, businesses, workers, and the health sector

How economic benefits are maximised:

- Numerous approaches to attract more people to play golf, including:
 - Affordable pricing to increase visitation, including membership discounts
 - No cost to hire clubs for children
 - No dress code, opening up golf to the whole community
 - Host numerous community events (see social benefits to the right), which raises the profile of the golf course and leads to more people playing golf
 - Greenspace Management is a signatory to the R&A Women in Golf Charter
 - SHANX Mini Golf added in 2021
 - Added a short tee to create a 9-hole par 3 course, reducing barriers for young players, people with a disability and beginners
 - Dual tee 18-hole format, increasing the number of players who choose to play 18-holes instead of 9-holes

\$672,000

Social benefits – comprising physical and mental health benefits and neighbourhood amenity benefits

How social benefits are maximised:

- Hosts numerous community events with free entry, including:
 - An Easter Egg hunt on hole 9 on Easter Sunday attended by 1,200 children
 - School holiday activities, such as an ultimate jumping castle obstacle course, a footy day with a best-dressed competition and AFL themed face painting, a carnival day with unlimited popcorn and fairy floss along with numerous games, a petting zoo, a water slide, a kids disco, a Halloween event, and more
 - Free golf for mothers on Mother's Day
 - Food truck nights
 - 'Touch a truck' day, delivered in partnership with the City of Port Adelaide Enfield, which was attended by 7,000 people
- GreenSpace Management and SHANX Mini Golf support RufUs, a charitable trust to help homeless people and people experiencing domestic violence
- Health benefits are maximised through affordable pricing to attract more golf course users

\$106,000

Environmental benefits – comprising benefits related to biodiversity, urban cooling, flood and stormwater management, water filtration and carbon sequestration

How environmental benefits are maximised:

- During consultation, GreenSpace Management reported that maximising environmental benefits is challenging given the limited resources available to GreenSpace Management and the City of Port Adelaide Enfield, and a focus on maximising community benefits in other ways. However, there are some cost effective initiatives that have been undertaken and some grant opportunities that are being pursued. For example:
- Having 'natural areas' instead of 'maintained areas' in low utilised parts of the course can improve environmental outcomes and reduce operating costs
 - Drought tolerant trees and vegetation is used throughout the course
 - A native tree nursery is planned for the site
 - GreenSpace Management has applied for a Green Adelaide Grant to increase vegetation density along the highway side of the golf course; this would serve to enhance environmental outcomes while also improving the amenity of the golf course and the golf playing experience

Little Para Golf Course – Adelaide, South Australia

With the support of the City of Salisbury, GreenSpace Management has extended the community value of Little Para Golf Course by improving the golfing experience and by making it a place for more than just for golf – contrary to orthodox beliefs, these outcomes can be complementary in nature as opposed to conflicting.

In 2021, Little Para Golf Course utilisation and community value was low, and City of Salisbury Councillors voted on whether to retain the course or convert it to an alternate use. Councillors ultimately decided to retain the course, and in 2023, GreenSpace Management took over operation of the venue. Since this time, utilisation and value has increased appreciably; notably, in the last year, golf course utilisation increased by around 50% (to about 24,000 rounds annually) and balls hit on the driving range increased by around 140% (to about 1.2 million balls annually).

GreenSpace Management Director, Peter Vlahandreas says: “GreenSpace has partnered with the City of Salisbury to deliver an outstanding golfing experience, as well as a raft of non-golf community focused programs... Public golf courses are for everyone in the community. With cultural change and committed partners in local councils, we are seeing more families, women and girls enjoying our venues” (Inside Golf article, September 2023).

Key changes made at Little Para Golf Course in recent years include:

- A refreshed vision and branding, and a renewed focus on marketing via social media, community events and other channels
- Introduction of a more relaxed dress code
- Extension of the driving bays (from 12 to 18 hitting bays) and introduction of Trackman technology
- Welcoming dogs on course

- Online booking of the 9-hole Par 3 golf course and driving range bays. Notably, the driving range booking puts a time limit on bay usage, which helps to increase bay turnover during peak times
- Free club hire for children and allowing adults to share a set of hire clubs
- Allowance of larger groups to play together (up to six at a time, although larger is possible), subject to not slowing play for others
- A revised yet budget friendly approach to course management, including mowing lines which are believed to make an appreciable difference in how people feel about the quality of the course

Of the changes listed above, Vlahandreas says: “By removing barriers and making improvements, **we’ve seen a big change in the types of people who come to play golf**; people you don’t see playing golf anywhere else... and now for the first time the course is making a profit.”

Patronage is set to increase even more over the coming years with an 18-hole SHANX mini golf opened during preparation of this report and implementation of a range of other initiatives which aim to increase how the community can interact with the golf course – “initiatives which keep people engaged to community and keep people active... a holistic community hub.”



Source of images: Little Para Instagram page

The success of this golf venue is supported by its alignment with the following themes

Theme 1	Theme 3	Theme 5	Theme 7	Theme 9
Theme 2	Theme 4	Theme 6	Theme 8	Theme 10

Little Para Golf Course – Adelaide, South Australia

The quantified benefits of Little Para Golf Course total \$1.7 million each year.

\$1 million

Economic benefits - comprising benefits for players, businesses, workers, and the health sector

How economic benefits are maximised:

- The 9-hole Par 3 course appeals to a broad range of golf enthusiasts and beginners. This, along with competitive pricing and relaxed rules (such as sharing of clubs, allowance of people to play music on the course, no dress code) maximises the number of rounds of golf played and revenue for the club
- Improving the golfing experience and value for money by delivering cost-effective course maintenance improvements
- Trackman technology at the driving range has significantly increased golf balls hit and revenue for Little Para Golf Course. The technology has also enabled fun games and competitions to be promoted, which attracts more visitors to the venue
- The course is generating a profit for the first time, allowing the City of Salisbury to divert resources to other initiatives that improve community wellbeing and/or community outcomes. Profit is set to increase once SHANX opens, which will provide additional capital for GreenSpace Management to further improve the golfing experience and economic value

\$.6 million

Social benefits – comprising physical and mental health benefits and neighbourhood amenity benefits

How social benefits are maximised:

- Increased visitation, which increases economic benefits as described to the left, also increases the health and wellbeing of visitors through time spent being active, socialising with friends and family, and time spent in greenspace
- The relaxed rules at Little Para challenge the traditional perception of golf, and contributes to greater social cohesion and community equity
- Construction of a seated picnic table and lawn games (such as cornhole) increase opportunities for visitors to stay and socialise for longer
- The addition of SHANX will increase opportunities for social interaction for mini golf users and broader community members

\$0.1 million

Environmental benefits – comprising benefits related to biodiversity, urban cooling, flood and stormwater management, water filtration and carbon sequestration

How environmental benefits are maximised:

- Natural areas of vegetation are planted across the course instead of 'maintained areas' in low utilised parts of the course to improve environmental outcomes and reduce operating costs
- With improved revenue and profit environmental outcomes will be enhanced at Little Para Golf Course with new initiatives planned

Matagarup Mini Golf – Perth, Western Australia

Matagarup Mini Golf is a successful standalone venue owing to its market positioning, location, beautiful and creative design, and affordable pricing

Matagarup Mini Golf opened in early 2024. It is a standalone 18-hole mini golf course located adjacent to Optus Stadium and 3 kilometres from the Perth CBD.

The location is important – although not many visit Optus Stadium and Matagarup Mini Golf in the same trip (anecdotally), visitors to Optus Stadium become aware of Matagarup Mini Golf and make plans to visit the precinct in the future. This outcome also supports State Government’s aspirations for the parkland around Optus Stadium to be an activated space used by residents and visitors to Perth.

As a standalone mini golf course, Matagarup operators were cognisant that the venue must be an attractor in its own right. This was achieved through an architect designed course to stand out as a step-change when compared to other mini golf courses.

Today, Matagarup Golf Course is visited by an average of 1,000 people each week, or around 140 people per day. This is anticipated to increase as the site is progressively developed to support ancillary functions and events (see features of the course to the right), and as the venue adapts to the market. For example, since opening, the price has been reduced for children, and parents are now able to share a putter if they do not both want to play a full round. While these changes have reduced average round prices, they have led to more visitors and an increase in overall revenue and community value.

Features of Matagarup Mini Golf:

- 9 of the 18 holes are wheelchair accessible, and companions of disabled people can play for free (with a companion card)
- Aspects which aim to provide a unique experience, including commissioned sculptures such as a swan (pictured right) and kangaroo sculpture, a scaled version of the new Matagarup Bridge integrated into the course, and surfboards
- Online booking functionality to secure play time
- Music played throughout the venue creates a relaxed atmosphere
- The target market is families, resulting in peak times on weekends and school holidays
- Kiosk serving food and (pending approval) alcohol
- The WA government is constructing a front of house venue which Matagarup Mini Golf will rent. This will include a cafe. Matagarup is also planning to construct a pergola, picnic tables and an entertainment deck to use for corporate functions, birthday parties and other activities which will increase visitation and enhance the visitor experience
- Floodlights to offer extended hours of play and to appeal to the corporate events market
- A landscaped artificial stream flows throughout the venue, and vegetation has been planted to provide shade and a high amenity to players; gardening is undertaken at 7am each weekday to keep the course to a high standard
- Strategically no technology integration with a hope that this increases social interaction on the course.



Source of images: Matagarup Mini Golf Instagram page

The success of this golf venue is supported by its alignment with the following themes

Theme 1	Theme 3	Theme 5	Theme 7	Theme 9
Theme 2	Theme 4	Theme 6	Theme 8	Theme 10

Matagarup Mini Golf – Perth, Western Australia

The quantified benefits of Matagarup Mini Golf total \$1.4 million each year.

\$1.2 million

Economic benefits - comprising benefits for players, businesses, workers, and the health sector

How economic benefits are maximised:

- Competitive pricing to maximise visitation, and flexible rules to entice more people to visit without playing
- Floodlight installation to extend the hours of play and appeal to a diverse market (targeting different market segments at different times of the day/week)
- Supports workers with diverse skillsets: hospitality, visitor experience, gardeners and others
- Brings residents and tourists into the precinct, complementing other businesses in the region, such as The Camfield hotel

\$.2 million

Social benefits – comprising physical and mental health benefits and neighbourhood amenity benefits

How social benefits are maximised:

- It is a new low-barrier to access activity in the region, increasing opportunities for families and friends to come together and socialise
- No technology on site to enhance social interaction among players
- The high amenity environment leads to long dwell times. Venue operators anticipated that the average visit time would be around 60 minutes but are finding people stay for 90 minutes because it is a pleasant place to spend time. Matagarup Mini Golf also enable large groups to play together (with some exceptions)

<\$10,000

Environmental benefits – comprising benefits related to biodiversity, urban cooling, flood and stormwater management, water filtration and carbon sequestration

How environmental benefits are maximised:

- 59 established trees, each \$1,000+, were brought on site and planted via crane to enhance the amenity of the site and increase visitation. This along with other landscaping provides numerous environmental benefits, such as floodwater mitigation, air and nutrient recycling, carbon sequestration and other benefits

Curlewis Golf Club – Bellarine Peninsula, Victoria

Curlewis Golf Club was given a second lease on life with investments in course improvements, accommodation and alternative golf formats, including a new driving range and mini golf course.

Curlewis Golf Club was facing financial ruin when it was purchased by local hospitality firm, The Sharp Group, in 2015, leading to a range of investments that have revitalised the Club. Curlewis' new owners have innovated on several levels, implementing course improvements and transforming the clubhouse into an entertainment hub featuring a new driving range, mini golf course, and X Golf simulator.

The changes have led to appreciable changes – when The Sharp Group took over, the average member age was **66 years** old and was heavily skewed towards men. Today, the average membership age is **54 years** old with a greater share of female members.

The introduction of alternative golf formats came alongside a desire to break down barriers traditionally associated with golf and attract new entrants to the game. The mini golf course appeals to families and those looking for a casual social activity, while the driving range is popular among corporate groups (particularly as there is an adjoining large function space) and golfers looking to hone their skills.

The **core of the Club has and always will remain its 18-hole golf course**, which continues to be enhanced through fairway improvements and bunker and green remodelling. These improvements have resulted in an elevated course status; in 2024 Curlewis was ranked the #25 best public access golf course in Australia, up from #42 in 2017 (Golf Australia Magazine). Similarly, Australian Golf Digest ranked it as the 62nd best course in Australia in 2024, up from 77th best in 2018.

Curlewis Golf Club has worked to promote a welcoming atmosphere, relaxing dress standards and providing pathways to attract more women and kids into the game.

In addition to an improved golf offering, the Curlewis Clubhouse includes an accommodation complex - an addition which came about due to a lack of existing accommodation in the Bellarine region – and a range of food and beverage options, including signature restaurant Claribeaux which has become a premier dining destination in the region, notably among non-golfers.

The integration of the Club with the broader Bellarine visitor economy has generated synergies with other golf clubs and tourist offerings, helping drive revenues across the region. The Bellarine is popular for golfing trips, with many overnight guests taking advantage of Stay Two, Play Two (or Stay Three, Play Three) offerings at Curlewis to visit multiple golf clubs in the area. Guests attending weddings at neighbouring Jack Rabbit (also owned by The Sharp Group) get a discount to stay at Curlewis, while partnerships with other tourist operators, such as The Q Train, sees Curlewis offering discounts and transport to guests who visit both destinations.



Source: Curlewis Golf Club Instagram page

The success of this golf venue is supported by its alignment with the following themes

- | | | | | |
|---------|---------|---------|---------|----------|
| Theme 1 | Theme 3 | Theme 5 | Theme 7 | Theme 9 |
| Theme 2 | Theme 4 | Theme 6 | Theme 8 | Theme 10 |

Curlewis Golf Club – Bellarine Peninsula, Victoria

The quantified benefits of Curlewis Golf Club total \$4 million each year.

\$2.1 million

Economic benefits - comprising benefits for players, businesses, workers, and the health sector

How economic benefits are maximised:

- Owners continue to invest in the golf course, delivering course improvements which have driven it up the rankings and constantly seeking new innovations that can be implemented to enhance the golfing experience
- Partnerships with other golf clubs, tourist operators, and restaurant operators (5 other premier courses on the Bellarine Peninsula, Jack Rabbit winery, Q Train, Port Phillip Ferries, and other businesses) help to drive visitation to the region and revenue for local businesses
- Restaurant and accommodation offerings attract users in their own right. These are promoted via different channels – there is a separate website for Claribeaux, and The Range restaurant has a separate Instagram page to promote events. Today, food and beverage contributes around 50% of the total revenue at the club and supports the commercial viability of the club
- Actively seek to encourage visitation during off-peak times and stay for longer, e.g., with cheaper offers for twilight golf, deals on accommodation, etc

\$1.5 million

Social benefits – comprising physical and mental health benefits and neighbourhood amenity benefits

How social benefits are maximised:

- Clubhouse acts as a social hub with events/promotions to draw people in, including trivia nights and happy hours
- Implements initiatives to break down barriers to entry, fostering an open and welcoming atmosphere and delivering programs targeted at attracting more women and kids
- New formats of golf (mini golf and foot golf) have led to new pathways for people to engage in the game and increased opportunities for families, friends and other groups (school, sports clubs, etc) to be active in a social setting
- Improvements to the golf course increases the amenity of the region, making the Bellarine Peninsula a more attractive place to visit and live

\$0.4 million

Environmental benefits – comprising benefits related to biodiversity, urban cooling, flood and stormwater management, water filtration and carbon sequestration

How environmental benefits are maximised:

- Uses recycled water from municipal sewerage for irrigation
- During peak periods, captured stormwater is used to supplement the recycled water supply.
- Established environmental wetlands which assist with drainage and sustain local wildlife

Maroochy River Golf Club – Sunshine Coast, Queensland

Maroochy River Golf Club is securing their future by establishing a 'cradle to grave' venue for players at every level

Maroochy River Golf Club relocated in 2015 following an opportunity to sell the previous golf course to the local council for a town centre. The funds received enabled the construction of a higher-quality golf course and clubrooms on an old sugar cane farm located 10 minutes drive to the north of Maroochydore.

Though highly successful with around 85,000 rounds played each year, the 18-hole course currently appeals predominantly to traditional golfers; notably, Maroochy River Golf Club membership ages are slightly above the industry standard. Part of this is because it is a Championship Course which may be intimidating for younger players and beginners. However, initiatives undertaken in recent years have sought to diversify the player base, and further actions are planned. Notably:

- An 18-hole mini golf course was constructed in 2018, which brings in around \$700,000 in revenue annually, mostly from families and tourists
- Maroochy River Golf Club has developed the largest junior and cadet program in Queensland, and there is specific womens coaching sessions led by women PGA professionals
- There are plans to construct a 9-hole golf course and a 9-hole par 3 course under lights, supported by plans to expand the clubhouse venue including potentially a playground for children

Features of Maroochy River Golf Club include:

- An 18-hole championship golf course accommodates around 50,000 rounds from members and 35,000 social rounds each year
- A high proportion of players use a buggy (around 70%), likely due to the length of the Championship Course and, Queensland heat and the slightly older than average membership base
- Low membership fees enabled by social play green fees, mini golf, driving range, and other revenue streams (bar & bistro, functions, etc)
- Golf tourism destination, particularly during winter months for citizens from southern Australia and New Zealand. Maroochy River Golf Club works collaboratively with three other golf courses in the region to attract more tourists for longer periods of time
- Social memberships available for non-players who just use the food and beverage offerings of the venue
- 7 person Board elected by golf members, who work with the general manager to operate the golf course as per the club constitution
- Courtesy bus from Maroochydore to the golf course to help attract players.



Source: Maroochy River Golf Club Instagram page

The success of this golf venue is supported by its alignment with the following themes

Theme 1	Theme 3	Theme 5	Theme 7	Theme 9
Theme 2	Theme 4	Theme 6	Theme 8	Theme 10

Maroochy River Golf Club – Sunshine Coast, Queensland

The quantified benefits of Maroochy River Golf Club total \$5.1 million each year.

\$2.5 million

Economic benefits - comprising benefits for players, businesses, workers, and the health sector

How economic benefits are maximised:

- Sold old course to local council and used funds to design a new 18-hole course, driving range and clubhouse. Relocation allowed the club to be located on a larger footprint and to improve features of the course that were constrained at the old site
- Built a new mini golf course in 2018 which introduced a new stream of revenue to the club and a whole new cohort of players
- To overcome challenges associated with the relocation, the Club implemented a courtesy bus to transfer customers from across the Sunshine Coast
- Public access has allowed membership fees to be kept low
- In addition to golf offering, the on-site F&B venues attract 900 social members
- Club continues to look for expansion opportunities, with plans to build a Par-3 course under lights

\$1.9 million

Social benefits – comprising physical and mental health benefits and neighbourhood amenity benefits

How social benefits are maximised:

- Targeted programming to attract more kids and women into the game:
 - Club has a Junior Committee which is dedicated to building junior golf. This has led the Club to have the largest junior program in QLD, with 140 junior members in 2024. The program offers training and junior tournaments.
 - Training sessions for women interested in learning golf, led by women PGA professionals
- Social membership and F&B offering has made clubhouse a meeting place and community hub, even among non-golfers
- Caters to an older player-base for whom golf is their primary physical workout and social interaction for the week

\$700,000

Environmental benefits – comprising benefits related to biodiversity, urban cooling, flood and stormwater management, water filtration and carbon sequestration

How environmental benefits are maximised:

- Created a wetland system as part of the site, choosing vegetation that would assist in managing birdlife and water quality. The Club has seen lots of native birds nest in the area, with bird watchers often parking near the course
- Water quality testing has revealed that water coming out of the course is of higher quality than water in the Maroochy River
- The course is on the boundary of the Maroochy River and used to be a sugarcane plantation. Since being converted to a golf course, the soil quality has improved noticeably

Chirnside Park Country Club and Gardiners Run Golf Course – Melbourne, Victoria

After relocating its golf course to Gardiners Run, Chirnside Park Country Club improved its offering for players and community members, and secured its financial sustainability and continued operation.

In 2002, Chirnside Park Country Club sold its golf course to residential developers, which provided the funds needed to develop a quality course in nearby Lilydale (named Gardiners Run). The new course addresses many of the issues that had hampered the original course, including poor drainage and issues with boundaries and residential neighbours.

Gardiners Run opened in 2014 and has seen membership numbers grow substantially in response to its well designed 18-hole course and welcoming atmosphere (from 240 members at the time of relocation to around 1,000 in 2024). The venue is open during the day only and primarily targets golf enthusiasts. There is no other entertainment offering – such as night-time food and beverage offerings, a technology-enabled driving range, or playground - due to perceived challenges in attracting residents to the venue for ancillary or non-golf related activities (the venue is outside the urban growth boundary and ~5 to 10 minutes drive from the Lilydale town centre), and because of this, a community and entertainment function is the priority of Chirnside Park Country Club.

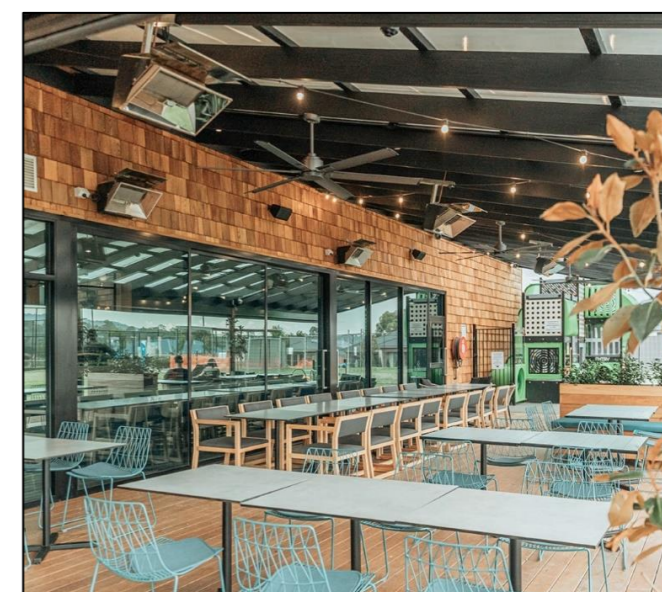
4.5 hectares were retained on the original golf site, which is now the Chirnside Park Country Club, a community hub featuring a bistro, sports bar, gaming, mini golf course, lawn bowls and tennis courts. This dedicated focus on the broader community has led to a similar uptick in memberships as seen at the golf course; there were 1,000 social members before redevelopment of the Country Club, and today there are 8,000 social members.

While establishing and operating two sites presents challenges, Chirnside Park Country Club has seen benefits in maintaining a footprint at its original location. Management at Chirnside Park Country Club & Gardiners Run recommends that, if possible, **venues relocating should retain a footprint at the original location** so that different community groups can be served with different offerings.

Many residents objected to the sale of the original golf course, lamenting the loss of green space and a nearby recreational venue. Retaining the Chirnside Park Country Club has ensured benefits continue to be delivered to local residents. As a suburban venue, the Country Club is affordable, welcoming, and focused on delivering services that reflect the needs and demographics of the local community. The bistro offers affordable dining, particularly attracting seniors with discounted meals for over 60s (~20% of meals sold are seniors' meals). The mini golf course is popular with families, schools, and people living with a disability.

Revenues from the Country Club assist in supporting the ongoing maintenance and investment in the golf course at Gardiners Run, which would not be possible with membership fees and green fees only.

While the two sites are largely separate, there has been some effort at maintaining linkages between them. Members are required to pay a \$75 'house account', which can be used on food at the Country Club.



Source: Chirnside Park Country Club Instagram page

The success of this golf venue is supported by its alignment with the following themes

Theme 1	Theme 3	Theme 5	Theme 7	Theme 9
Theme 2	Theme 4	Theme 6	Theme 8	Theme 10

Chirnside Park Country Club and Gardiners Run Golf Course – Melbourne, Victoria

The quantified benefits of Chirnside Park Country Club and Gardiners Run Golf Course total \$8.4 million each year.

\$6 million

Economic benefits - comprising benefits for players, businesses, workers, and the health sector

How economic benefits are maximised:

- Sale of original golf course provided the capital for developing a quality offering, both at the new golf course and the Country Club. Investments were focused on delivering for the local community and members. The venue was at risk of closure prior to relocation due to low membership numbers, low visitation, and a clubhouse nearing end-of-life
- Revenues from the Country Club help keep membership fees at a price that is suitable to the local demographic. Members are encouraged to utilise the Country Club through a 'house account' that can only be used on F&B at the Country Club
- \$815,000 returned to the community each year, partly in the form of sponsorship of local sporting clubs and schools
- The footprint at Gardiners Run is unique – one service counter can manage green fees, retail, the café and bar. It is a very efficient and workable model and helps to keep staffing costs low, which supports lower membership fees and/or more funds for course maintenance

\$1.8 million

Social benefits – comprising physical and mental health benefits and neighbourhood amenity benefits

How social benefits are maximised:

- Chirnside Park Country Club is a social hub built around the demands of the local community:
 - Discounted meals for over 60s leads to high visitation by seniors (over 80% of meals sold are for seniors)
 - Mini golf course is disability-friendly by design
 - Mini golf also popular with school groups, especially as an end of term activity. This is offered cheaply to schools (~\$5 per child instead of the standard price of \$12.50)
 - The Club donates to schools and sponsors local football and cricket clubs
- Gardiners Run Golf Course offers variable pricing for cart hire, which is designed to keep elderly players connected to the game and their community (standard cart hire price is \$45, and this reduces to \$35 for people aged 65+, \$25 for people aged 75+ and \$10 for people aged 80+)
- Pre COVID-19, Chirnside Park Country Club ran a family day on Good Friday, which was attended by 5,000 community members and would raise around \$30,000 for the Royal Children's Hospital in Melbourne

\$700,000

Environmental benefits – comprising benefits related to biodiversity, urban cooling, flood and stormwater management, water filtration and carbon sequestration

How environmental benefits are maximised:

- Solar panels on the roof of both venues
- The land for Gardiners Run Golf Course was previously a quarry – conversion to golf course led to greater tree and grass cover than what would otherwise have been achieved through repurposing the land for a different use
- Treated water is used for irrigation
- Bottle deposit unit hosted in Country Club carpark for both the club and general community use

Swing City Golf – Sydney, New South Wales

Swing City Golf delivers benefits to a broad audience through its dynamic entertainment offering.

Swing City is a golf-focused entertainment venue which opened in The Hills Shire in 2023. It offers a range of activities including a 40-bay driving range, mini golf course, and ancillary free-to-play activities. The objective is to make golf the centre of a highly entertainment-based venue that is attractive to all (golfers and non-golfers).

Swing City has been very successful – management advised that if they could change one thing, they'd make everything bigger to service the high-demand of around **25,000 visitors per month**

Located in an urban setting, Swing City is unique in that the driving range is fully enclosed by netting and only runs 60 metres in length. This length allows players to get a sense of ball flight, with InRange Golf Technology providing data on full-length ball flight and other information. The technology allows players to improve their game while engaging in a mix of challenges and competitions either on their own or in a social setting.

The venue has driven participation by removing barriers to entry and promoting a social, affordable, and fun atmosphere. The driving range is designed to maximise social interaction and convenience, featuring group tables at each bay and high barriers between bays to increase privacy and user comfort (particularly for beginners). Swing City's food and beverage offering is fully integrated with the driving range, with users able to order food and drink to their driving range bay, along with its undercover bar and dining areas.

The mini golf course was designed by a golf architect to be a creative and engaging 18-hole course which mimics a full-sized course. As with the driving range, drinks can be taken by patrons onto the mini golf course, contributing to its social atmosphere.

Both the driving range bays and mini golf must be booked; this helps to prevent 'overload of the system' during peak times and manages the user experience and expectations. There are a range of free-to-play options to entertain visitors while they wait to play or following their play – this includes yard games, an amusement centre, and table tennis tables. While free to play, the activities increase dwell time and food and beverage sales at Swing City.

While golf activities are the visitation driver, hospitality offerings are central to business success; notably, around 50% of all revenue is associated with food and beverage sales.

Features of Swing City Golf include:

- Golf venues include a 40-bay driving range and an 18-hole outdoor mini golf course
- Sit-down dining and bar, as well as food and beverage service to the driving range
- Coaching by PGA Golf Professionals, and junior classes
- Highly appealing venue for corporate groups.



Source: Swing City Golf Instagram page

The success of this golf venue is supported by its alignment with the following themes

Theme 1	Theme 3	Theme 5	Theme 7	Theme 9
Theme 2	Theme 4	Theme 6	Theme 8	Theme 10

Swing City Golf – Sydney, New South Wales

The quantified benefits of Swing City Golf total \$x each year.

Economic benefits - comprising benefits for players, businesses, workers, and the health sector

How economic benefits are maximised:

- A clear strategy and site selection underpin all economic benefits
- Numerous approaches to maximising visitation and revenue, including:
 - Diverse offering which increases dwell time – e.g., people use mini golf or arcade games while waiting for a spot on the driving range
 - A focus on diverse entertainment sees groups attend without needing a clear idea of what to do – some will use the driving range, some mini golf, some arcade games, and some just for the food and beverage offering
 - Integrated food and beverage offering with driving range and mini golf course leads to increased sales
 - A separate restaurant/bar/cafe area for visitors who do not wish to partake in any activity and/or for parents of children who play mini golf or use the driving range
 - Removed barriers to entry and marketed venue to everyone – school groups, senior citizens, families, and friend groups. This includes focused marketing to attract different cohorts during non-peak times

Social benefits – comprising physical and mental health benefits and neighbourhood amenity benefits

How social benefits are maximised:

- Encourages and facilitates social interaction with:
 - Tables/ lounges at driving range bays
 - Sit-down food and beverage space which is open to anyone, regardless of whether they've booked into an activity
 - Capacity to host and cater functions and events, such as corporate events and kid's parties
 - Junior clinics to get kids involved, meeting others, and participating in fun games and competitions
- While not offering the same physical health benefits as walking a 'traditional golf' course, Swing City does support people to be more active than they may otherwise be – young people in particular participate in a range of activities at Swing City which improves their hand-eye coordination and mobility
- Having an engaged, fun and vibrant workforce providing top level customer service

Environmental benefits – comprising benefits related to biodiversity, urban cooling, flood and stormwater management, water filtration and carbon sequestration

How environmental benefits are maximised:

- Swing City have several sustainability initiatives running across their franchise venues
- Recycling balls and clubs is one way they reduce impact to the environment

Pacific Golf Club – Brisbane, Queensland

Pacific Golf Club redeveloped their clubhouse with funding from a land lease with Reside Communities, enabling an expansion of venues that has boosted financial sustainability and community engagement.

Pacific Golf Club is fully owned by its members and governed by a Board. The Club was approached by Reside Communities in 2017 with a proposal to develop a retirement village on land leased from the Golf Club. The lease premium included the cost of a new clubhouse for Pacific Golf and \$3 million of ancillary works to develop a mini golf course, driving range, and a new putting green. Pacific Golf continues to receive an ongoing cut of the deferred management fee received by Reside Communities, making it an enduring source of revenue for the Club.

In addition to this direct revenue, Pacific Golf sees residents at Reside Communities visiting and spending at the Club, mostly on food and beverage at the clubhouse restaurant and bar. For Reside Communities, the location on the golf course adds to its premium image, with apartments overlooking the golf course attracting a higher price point. The clubhouse redevelopment and the addition of alternative golf formats have increased revenue and ensured the long-term viability of the Club. Membership fees cover only the costs of course maintenance, therefore additional revenue is needed to cover clubhouse costs and build a sinking fund for future capital replacement.

The inclusion of a mini golf course, driving range, and golf simulators have helped attract new entrants to the game, and has driven repeat visitation across golf formats. For example, kids who come for mini golf will see the driving range or simulators and will want to come back and give it a go, or beginner golfers will come to try out the driving range and progress towards playing on the full course.

The success of Pacific Golf Club has also been driven by a concerted effort to market the Club as friendly, social and welcoming. Bringing in a full-time marketing manager was an integral part of a rebranding process which helped to promote the course to families, kids, and those who might not typically visit a golf course. Social memberships are growing month-on-month; now at around 2,500, the target is to reach 10,000 social members.

Features of Pacific Golf Club include:

- Member-owned. A decade ago the average member age was 65; now it is 56. There is a member wait list of 100 people with an average age of 39
- A championship 18-hole course and a 9-hole par-3 course appeal to members and social players, and helps to smooth utilisation across the week (i.e. some people opt to play the par-3 course during the week)
- A mini golf course
- 4 x Trackman simulators, often used for corporate events
- 1,000 sqm putting green
- Lessons and coaching by PGA professionals
- A clubhouse restaurant and bar + beer garden with regular events, deals and packages, such as Tuesday Trivia, live music and dog-friendly hours at the beer garden
- Significant planting of native trees



Source: Pacific Golf Instagram page

The success of this golf venue is supported by its alignment with the following themes

Theme 1	Theme 3	Theme 5	Theme 7	Theme 9
Theme 2	Theme 4	Theme 6	Theme 8	Theme 10

Pacific Golf Club – Brisbane, Queensland

The quantified benefits of Pacific Golf Club total \$4.7 million each year.

\$2.6 million

Economic benefits - comprising benefits for players, businesses, workers, and the health sector

How economic benefits are maximised:

- Partnered with Reside Communities to lease unused parts of the golf course. This funded the redevelopment of the clubhouse and new facilities and provides an ongoing stream of revenue. This was integral to the future commercial viability of the club and supported
- Employed full-time marketing manager to shift the image of the Club to one that is welcoming and family-friendly. This has helped attract new users and more return visitors
- Developed a positive work culture through staff engagement and incentives. This has led to low staff turnover and increased customer satisfaction
- Retained members by bringing them along on the redevelopment journey – there is always opposition to change, but communicating the benefits to members helped them feel included

\$1.7 million

Social benefits – comprising physical and mental health benefits and neighbourhood amenity benefits

How social benefits are maximised:

- New clubhouse was designed to be a social space for users, driven by:
 - Events such as wine dinners, international beer day, mother's/father's day, Tuesday trivia, and more
 - Jumping castle every weekend contributes to family-friendly atmosphere
 - Cheap social membership encourages return visitation and creates a sense of community
 - Function spaces open to booking for corporate events and kids party packages
- External surveys are an important part of understanding customer feedback and how the course and venues can be improved. Feedback has been implemented, and customer satisfaction rate is up to 91% compared to a starting point of 83%

\$300,000

Environmental benefits – comprising benefits related to biodiversity, urban cooling, flood and stormwater management, water filtration and carbon sequestration

How environmental benefits are maximised:

- Pollination project on unused parts of the course.
- Significant tree planting and development of screening areas with native trees
- ~52 hectares of green space

Shortees Golf – Terrey Hills, New South Wales

Since current management took over, Shortees Golf has seen a 3 fold increase in course visitation. Central to achieving this has been establishing a vision and focusing on infrastructure improvements, brand development and events to achieve that vision.

Shortees is a par 3 'pitch and putt' course, with holes between 38 and 88 metres in length. This provides the 18-hole golfing experience, but on less than 4 hectares of land.

Around 100,000 rounds are now accommodated at Shortees each year (an average of close to 300 rounds each day). This is underpinned by the golf offering – i.e. the short course and fast play format – however, it is driven by the current operator's execution of a vision to create a community around events and branding and establish a place where people want to spend time. Delivery of this vision has been supported by a team of investors with diverse background (property development, sport and entertainment professionals, and brand experts). The vision has seen the following changes made at Shortees Golf:

- Renovation of the clubhouse including the addition of a kitchen and bar which is open 7 days per week
- Speakers added throughout the venue to create a more social environment
- Lights added to facilitate play until 10pm 7 nights per week
- Shortees Golf curated events and offerings, such as happy hour every day, 'chip 'n sip' ladies' social night, Monday night lights competitions, 'The Masters at Shortees', the 'Putters and Dribblers Tournament', and more. These events serve to increase rounds played and food and beverage revenue
- A target on supporting other corporate and social events not curated by Shortees
- Introduction of a hole 18 'jackpot', which has seen opportunities to win over \$1,000

- A focus on those aged 18 to 35. All are welcomed, but targeting a specific age group has been important to creating the desired brand and community
- An extensive retail offering of tees, headwear and golf accessories. Shortees is aiming to build this retail brand
- Support of groups of up to 10 players or even more under some circumstances (e.g. for bucks/hens parties or other large groups)

Different to most other venues, Shortees does not provide for round booking online. Instead, visitors join a digital queue upon arrival. This process helps to manage course demand and visitor expectations about play time (queue times typically peak at around 10 to 15 minutes), while also providing an environment whereby visitors are pushed to engage with other on-site offerings, such as the restaurant and bar or games such as cornhole. Shortees also do not accommodate members as they want every visitor to feel equally welcomed on site.

Shortees operators advised that most visitors do not have a membership elsewhere (Shortees is their main golf activity, and around 60% of visitors have never or rarely swing a club). However, the opportunity that Shortees provides for players to tee off, chip and putt is believed to develop people's interest and engagement in golf more than what occurs from visiting a driving range or mini golf course. To this end, Shortees is considered to be a 'nursery' or 'feeder' for local golf courses. Shortees also 'book ends' people's golfing careers, with people in their 80s and 90s coming in weekly to play.

MONTHLY HOLE IN ONES	
DAVID STRACHAN	2
LEON LI	7
BOZ	18
SEAN LANGUAM	13
JASON CORROTO	13 & 18
FUZZY	5
MOZ GRAHAM	9
LISA WILLIAMS	8
GILLY	14
BEN GROZIER	14
BEN CANNON	5
ROB BOLTON	4
PRESTON STEWART	5
BAILEY LEAFE	1
LACHIE WOOD	2
CHRIS HAFLEY	10
W TRANTUM	10
HENRY HAY	4
MCINNES	9
JORDAN M	10



Source: Shortees Golf Instagram page

The success of this golf venue is supported by its alignment with the following themes

Theme 1	Theme 3	Theme 5	Theme 7	Theme 9
Theme 2	Theme 4	Theme 6	Theme 8	Theme 10

Shortees Golf – Terrey Hills, New South Wales

The quantified benefits of Shortees Golf total \$1.5 million each year.

\$450,000

Economic benefits - comprising benefits for players, businesses, workers, and the health sector

\$945,000

Social benefits – comprising physical and mental health benefits and neighbourhood amenity benefits

\$69,000

Environmental benefits – comprising benefits related to biodiversity, urban cooling, flood and stormwater management, water filtration and carbon sequestration

How economic benefits are maximised:

- Promoted a message that all are welcome – there's no dress code, no tee times, and limited rules which contributes to a relaxed and welcoming atmosphere, and a reported wait time of only 10-15 minutes under their model
- Organised events and tournaments to encourage visitation – including 'chip n sip' ladies' social nights, happy hours, 'putter and dribblers' tournament, and Monday Night Lights weekly competition
- Sells 'Shortees' merchandise, contributing to a cohesive brand image
- Adding lights to the course increased hours of use and therefore revenue

How social benefits are maximised

- A lack of strict rules and a welcoming atmosphere has promoted the venue as a social and community space. This has been driven by:
 - An integrated F&B offering, with players allowed to take beverages onto the course.
 - Larger groups allowed to play together
 - A short course means people are walking together between tees, facilitating social interaction
 - Welcoming atmosphere and quick games make the venue friendly for beginners, attracting new cohorts of players who may not have engaged with golf before
 - Targeted events and tournaments encourages social interaction and creates comradery

How environmental benefits are maximised

- Green space in an urban location delivers several environmental benefits, including urban cooling, improved stormwater drainage, water filtration, and carbon sequestration.

X Golf – numerous franchise locations across Australia and New Zealand

There are many barriers to playing on course golf – skill level and confidence to play 9 or 18 holes, exclusive membership courses and perceived exclusivity of most golf courses, dress code regulations and other barriers. X-Golf aims to provide an easy and social avenue into golf.

As an indoor-only, small-footprint venue, X-Golf venues can be located in highly accessible, dense urban areas; i.e. areas where their customers are.

Following proof of concept, X-Golf has been established as a franchise company, allowing independent operators to access X-Golf branding and technology for a franchise fee. The model has been successful, and there are now around 30 X-Golf venues across Australia and New Zealand.

The typical X-Golf venue has 8-12 simulators, with a centralised bar and open atmosphere to facilitate social interaction.

Even more than 'traditional golf', X-Golf has established itself as a male-centric offering; today, around 80% of all players are male. This is due to it being a venue primarily for existing golfers who want to continue to develop their game. Differing to golf courses, however, X-Golf predominantly attracts younger players, typically those between 18 and 45 years old.

The visitor base is a little broader at venues which also have Hey Caddy, a mini golf offering which is separately branded but an integrated offering at some X-Golf venues.

Visitors are attracted to X-Golf and Hey Caddy for:

- Opportunities to improve their game via insights offered by technology and golf professionals (X-Golf)
- X-League, Australia's largest golf league with 1,100 participants nationally. X-League involves 3 x 12 week seasons each year (including 2 championship weeks) with competitions taking place three nights per week (X-Golf)
- Social interaction with friends and family via playing golf and by the ancillary food and beverage offerings and events spaces (X-Golf and Hey Caddy)
- Corporate and social events (X-Golf and Hey Caddy)



Source: X-Golf Australia Instagram page

The success of this golf venue is supported by its alignment with the following themes

Theme 1	Theme 3	Theme 5	Theme 7	Theme 9
Theme 2	Theme 4	Theme 6	Theme 8	Theme 10

X Golf – Geelong

The quantified benefits of X-Golf total \$229,000 each year.

\$164,600

Economic benefits - comprising benefits for players, businesses, workers, and the health sector

\$64,400

Social benefits – comprising physical and mental health benefits and neighbourhood amenity benefits

<\$10,000

Environmental benefits – comprising benefits related to biodiversity, urban cooling, flood and stormwater management, water filtration and carbon sequestration

How economic benefits are maximised

- Franchises are generally located in highly accessible urban areas and attract visitors through an offering focused on entertainment and social interaction
- Top-tier technology brings in visitors primarily interested in working on their golf, while the social atmosphere and F&B offerings bring in groups looking for a fun activity
- While the X-Golf simulators are the primary offering, mini golf, function space, pool tables and dart boards contribute to the entertainment offering

How social benefits are maximised

- X-League competition brings teams of players together every week and gives them an experience where they can try something new, achieve their golfing goals, and feel part of a community
- Integration with food and beverage and ancillary offerings maximises opportunities for socialising

How environmental benefits are maximised

- X-Golf have several sustainability initiatives running across their franchise venues

Moore Park Golf Course – Sydney, New South Wales

Moore Park is one of the oldest, most accessible and busiest public courses in Australia.

Moore Park Golf Course is a public golf course in central Sydney, just 3 kilometres from the CBD and is one of the busiest golf courses in Australia. The venue includes an 18-hole championship course, outdoor driving range, and heritage-listed clubhouse.

In 2023/24, Moore Park Golf Course was anticipated to support around:

- 100,000 rounds of golf (an average of around 275 rounds per day)
- 28,000 lessons by Sydney Golf Academy (an average of around 77 lessons each day)
- 250,000 buckets of balls being hit on the multi-level driving range (an average of around 685 buckets per day).

In addition, the course contains multiple event, entertainment and dining areas, and supports corporate team building events, offsite meetings, conferences, wedding receptions and other special events, all with spectacular views across Sydney.

One of the largest coaching programs is provided by Sydney Golf Academy, with 9 PGA of Australia Professionals teaching people of all ages and abilities to play golf.

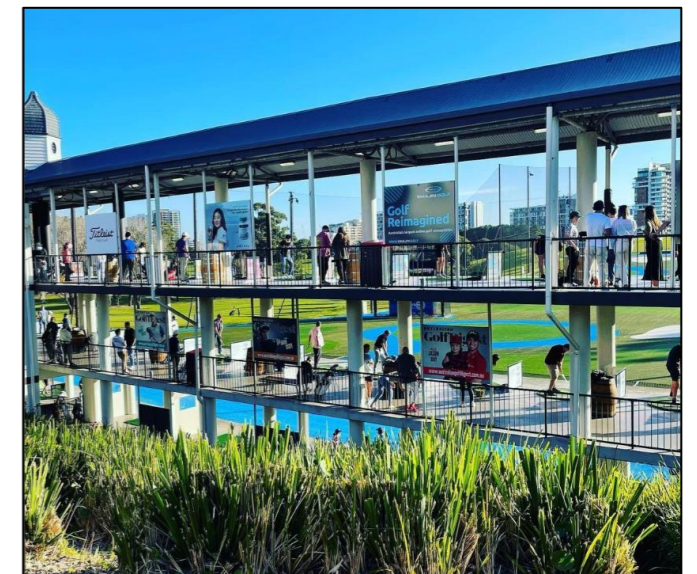
Moore Park Golf Course is part of the social media and online golf culture phenomenon, with coaches, influencers and content creators elevating and attracting users to the site.

As a public golf course that is also a championship level course means it caters to all levels from beginner entry where people learn to play and stay forever, right up to hosting national level tournaments and developing future pipeline of golf stars.

Collaboration between the operator, golf club, land manager and landowner can be complex, however it also creates an enormous opportunity to further maximise benefits in the future.

Visitors are attracted to Moore Park Golf Course for:

- The opportunity to play on its championship 18-hole course
- Use of the 60-bay driving range, equipped with FIFA grade turf to mimic the golf course and Trackman Range technology
- Social interaction with friends and family via playing golf and by the ancillary food and beverage offerings and events spaces at the clubhouse
- Corporate and social events, including weddings
- Building a social media footprint at one of Australia's most iconic public courses



Source: Moore Park Instagram.

The success of this golf venue is supported by its alignment with the following themes

Theme 1	Theme 3	Theme 5	Theme 7	Theme 9
Theme 2	Theme 4	Theme 6	Theme 8	Theme 10

Moore Park Golf Course – Sydney, New South Wales

The quantified benefits of Moore Park Golf Course total \$14.8 million each year.

\$6.2 million

Economic benefits - comprising benefits for players, businesses, workers, and the health sector

How economic benefits are maximised

- Diverse offering, including a championship course and outdoor driving range with new technology and booking system
- Through its central location and public accessibility, the course has become one of the busiest in Australia, attracting a range of golfers, including domestic and international tourists while on one- or two-day trips or longer visits
- Multiple revenue streams, including through function space to host non-golf related events, including weddings and corporate functions that can be bolstered with including golf as an activity

\$5.6 million

Social benefits – comprising physical and mental health benefits and neighbourhood amenity benefits

How social benefits are maximised

- Diverse golf offerings, combined with quality F&B options and central location, makes it a popular meeting space and community hub
- Space for corporate events and group celebrations, with many companies using it for team building activities

\$3 million

Environmental benefits – comprising benefits related to biodiversity, urban cooling, flood and stormwater management, water filtration and carbon sequestration

How environmental benefits are maximised

- Green space in a central urban and highly densified location delivers several environmental benefits, including urban cooling, improved stormwater drainage, water filtration, and carbon sequestration
- Tree planting contributes to habitat preservation and sustains native wildlife including protecting and regeneration of the indigenous Eastern Suburbs Banksia Scrub connecting local First Nations community and learning to care for country

Morack Public Golf – Melbourne, Victoria

By focusing on customer service and entertainment, rather than promoting the 'golf' aspect of the venue, Morack Public Golf has drawn an entirely new demographic of the community into the game.

Since re-opening, Morack Public Golf has been a hit with golf enthusiasts, beginner golfers and the general community.

The venue is operated by Swing Factory, who attribute a large part of their success to the operating model they agreed with Whitehorse Council. Features of the operating model include:

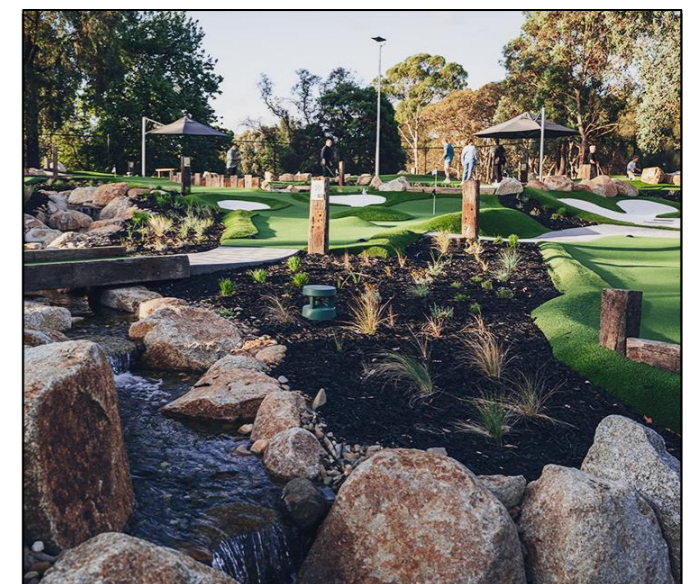
- Whitehorse Council funded most of the capital expenditure (to deliver the base build design) and Swing Factory invested several million dollars on the venue fit-out to enhance the customer experience
- Swing Factory secured a 20-year lease with a high-level autonomy in how they operate the venue, including setting the pricing and freedom to adapt/innovate their service delivery model. This has returned dividends for all stakeholders and visitors.

The venue has been so successful that Council is bringing forward \$2.5 million of capital in their budget to maximise benefits for all (for Council, Swing Factory and the community)

While Whitehorse Council was market leading in developing an operating model to maximise the community benefits of golf, there were some lessons learnt through the process. Most notably, Whitehorse Council worked with architects to design the venue, appointed a contractor for delivery, and then secured Swing Factory as the operator. Involving Swing Factory earlier in the design process would have led to a venue design that optimised the customer experience and increased the community benefits generated.

Prior to redevelopment, Morack Public Golf featured an ageing clubhouse and an 18-hole golf course. Today, it includes:

- 18-hole golf course
- A technology supported 28-bay driving range, which is on track to host around 200,000 visitors in its first operating year (equivalent to an average of 550 visitors per day, or 20 visitors to each bay each day). As stated by the Swing Factory team: *"we'd have more bays if we could... if you want to play at the driving range on the weekend then you're going to have to book your bay ahead of time, otherwise you'll face a 3-4 hour wait."* The technology enables people to play different formats (e.g. family friendly formats, friend competition formats, avid golfer formats, etc), and QR codes enable people to order food and drinks directly to their bays
- An 18-hole mini golf course, which serves a broad user base, from grandparents and parents with kids, first date nights, corporate groups, and more. It appeals to the entertainment seeker who is after low barrier to entry fun
- A café and restaurant that serves those who visit for golf and also the broader community
- Two meeting rooms which can be used for golf functions or for other community and business uses



Source: Morack Public Golf website.

The success of this golf venue is supported by its alignment with the following themes

Theme 1	Theme 3	Theme 5	Theme 7	Theme 9
Theme 2	Theme 4	Theme 6	Theme 8	Theme 10

Morack Public Golf – Melbourne, Victoria

The quantified benefits of Moore Park Golf Course total \$3.8 million each year.

\$1.9 million

Economic benefits - comprising benefits for players, businesses, workers, and the health sector

How economic benefits are maximised

- Council invested significantly in the asset to deliver a base build product that appeals to the market. Swing Factory invested further to provide a premium customer experience that motivates people return time and time again
- The governance and operating model agreed between Whitehorse Council and Swing Factory underpins the generation of all economic benefits. Swing Factory advised that they would not have invested in the venue without the 20-year lease and autonomy in how they operate their business
- The technology enabled driving range is a key factor that 1. drives increased visitation to the venue, and 2. enhances the customer experience and willingness to pay to book the driving range, and 3. increases food and beverage sales. These outcomes – more visitors who each spend more money – enhances revenue for the venue

\$1.6 million

Social benefits – comprising physical and mental health benefits and neighbourhood amenity benefits

How social benefits are maximised

- While visitors to Morack Public Golf may spend more money than at other golf venues, they do so because the social experience is better. The focus on entertainment (both from a marketing and customer service perspective), as opposed to the 'golf' experience, means that more people visit, and they stay longer to socialise
- The online booking system for the driving range, mini golf course and 18-hole golf course means that people can visit with confidence that they'll be able to play
- Swing Factory have a head office function off site, so the on-site staff focus on customer service and enhancing the customer experience
- The café attracts broader community members and groups

\$300,000

Environmental benefits – comprising benefits related to biodiversity, urban cooling, flood and stormwater management, water filtration and carbon sequestration

How environmental benefits are maximised

- Swing Factory has appointed a maintenance contractor and so do not actively drive environmental initiatives themselves. That said, they have sought to reduce costs by using robotics for ball collection at the driving range, which has a positive externality in that it reduces emissions which may have been associated with a petrol-powered vehicle
- Initiatives are likely to be achieved and driven by Whitehorse Council including protecting, enhancing and promoting biodiversity at the site

A

Appendix A: Developing your golf venue improvement plan

Developing your golf venue improvement plan

This report is intended to help inform venue operators about the economic, social and environmental benefits which well-operated golf venues can generate. The information in this report can be used to inform the rationale for refinement to venue operating models, as well as investment decision-making and subsequent funding applications.

Venue planning and development should be founded on a solid understanding of market conditions, consumer (and/or community) sentiment, risk identification, and financial analysis. Large projects should be properly planned and developed through a staged process, which may typically involve the following steps:



Smaller projects should be integrated within a wider vision and master plan for the venue.

The following pages further details typical project-planning steps from vision to investment. Some of the steps are contextualised within general government business case frameworks, as such frameworks are designed to inform decision makers about the investment need and the option(s) that provide the best value for money. The frameworks illustrates how venues may consider investment over the short, medium and long-term to maximise community benefits.

The final page of this appendix is a plan on a page template, as a step to getting started.

The [Australian Golf venues Guidelines](#) provides guidance on project management, site arrangement, design principles, and venue maintenance. Venue operators can refer to these guidelines throughout the project-planning process.

[Golf Australia](#) is the governing body for golf in Australia. Among other things, their responsibility includes developing programs and opportunities to engage as many people into the game as possible. Golf Australia works with all types of golf venue operators and all levels of government to deliver on their responsibilities.

To maximise benefits, member and community buy-in, and delivery efficiency, golf venue operators should engage with Golf Australia early and continuously. They can assist with telling the story of venue specific community benefits and connect with other industry members such as the PGA of Australia.



Developing your golf venue improvement plan

Identifying and assessing investment options:

- 1** *Clearly defining the need for action*

The first step in any decision is to examine the problem or opportunity that currently exists. A good investment requires targeted funding – articulating the need for change and the intended outcomes at an early stage will help provide direction and ensure funding is directed consistently towards meeting objectives. The need for action should be considered from two perspectives:

 - The issues at hand. This is termed the '*problem statement*'. For golf venues, this may involve quantifying and qualifying how and why an asset may be underperforming
 - The potential benefits on offer, or the '*benefits statement*'. This may be aided by the findings of this report (i.e. the extent to which other venues can generate member and community benefits), along with a regional gap analysis to understand market context, demographic analysis, and other benefit assessment.
- 2** *Stakeholder engagement*

While no decision will please everyone, it is important to try and align desired outcomes with the demands and characteristics of members, consumers, community, and other key stakeholders. Engagement provides an opportunity to assess how proposed changes will be received and to consider alternative investment options.

This step should also include early engagement with key experts, consultants, industry bodies such as Golf Australia and PGA of Australia, and/or the case study venues detailed in this report. Early engagement will help guide the subsequent steps and ensure the process is streamlined from the beginning.
- 3** *Feasibility analysis*

The feasibility of proposed project options should be tested from a variety of perspectives, including financial, socioeconomic, and environmental perspectives. The dashboard (see user guide in Appendix B) is designed to help guide operators in quantifying the social and economic benefits of a venue. If the impacts of a proposed project are known, this can be used to help guide and rationalise investment decisions.

Operating model:

- 4** *Assess benefits of different governance models*

If not already established, consideration should be given to the operating structure of the venue. The operating structure will influence the objectives of the venue and the decision-making process.
- 5** *Risk identification*

All investments comes with some degree of risk. Understanding these risks at an early stage will allow mitigation strategies to be incorporated into decision-making and implementation.

Master planning and branding:

- 6** *External expertise*

Master planning should incorporate consultations with external experts where appropriate. This could include course design architects, developers, planners, or industry bodies, such as Golf Australia and PGA of Australia, and venue operators that have completed similar projects to understand their learnings.
- 7** *Regulation and compliance*

Consider whether any permits, licenses or approvals are required for any of the project options.

Investment:

- 8** *Implementation*

Once a decision has been made, it must be implemented. Implementation analysis should be undertaken to detail the steps for executing each initiative, including roles and responsibilities, budget, timelines, marketing and communication.

Developing your golf venue improvement plan

While it may be appropriate for golf venue owners and managers to have ambitious aspirations to transform their venue, incremental and pragmatic steps can be useful to mitigate risks and to deliver an offering that suits existing and prospective user groups. To this end, asset and operating improvement initiatives may be considered across the Three Horizons framework (devised by Baghi, Coley and White, 1999), illustrated to the right, which was formulated in the context of commercial business planning but is highly adaptable and relevant to the operation of community assets.

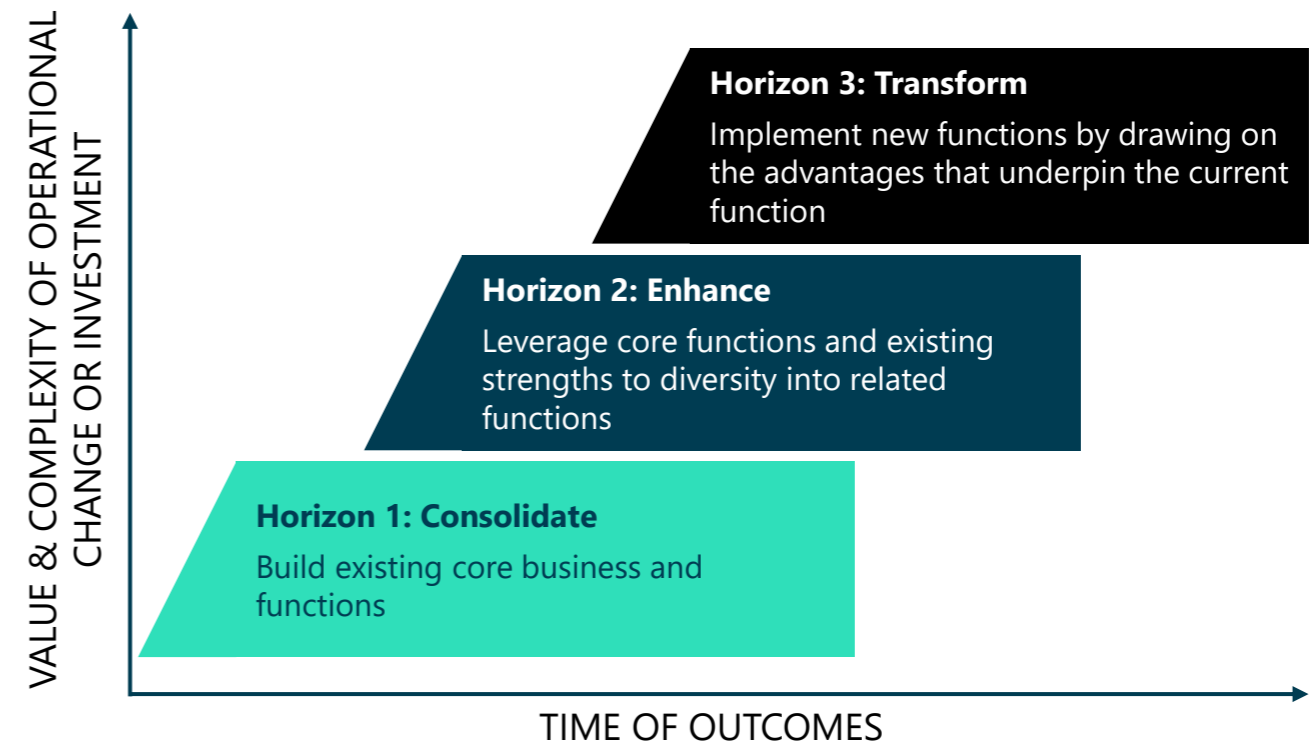
Within the context of golf venues, the first horizon is concerned with protection of the venue's existing core business. The focus here is on cost control and ensuring that the current customer base is retained by continuing to offer reliable quality.

In planning to the second horizon, the venue looks for ways to incrementally leverage its current core businesses to expand its customer base. This may involve diversification into related product streams, or providing value added services to existing products.

Planning to the third horizon would require a venue to lift its sights to contemplate new opportunities which might be quite distant from current core business, but which draw on the competencies, skills and endowments which underpin current activities. This is the horizon where the venue seeks to 'reinvent itself'.

A venue which is preoccupied with the first horizon is likely to become moribund and wither, as competitors (including those not in the golf sector directly, but perhaps in the broader recreation or entertainment sectors) inevitably devise more compelling offers for their customer base. On the other hand, businesses which are caught up in 'blue sky' thinking (horizon three) are likely to become vulnerable to challenge on the basics, losing the market share required to underwrite innovation projects. Thus, all three horizons must be addressed for a healthy future, and all three horizons require equal weight (approximately) even though they vary considerably in emphasising pragmatism over vision and vice versa.

Readily achievable projects are typically concerned with protecting existing competitive strengths, or with capturing near term diversification / value adding opportunities. They therefore fit the definitions for horizon 1 and horizon 2 initiatives. The more ambitious (usually, but not necessarily, longer term) initiatives can be incorporated under horizon 3.



What this framework shows is that golf venue owners and managers need not be overwhelmed with where to start to transform their business. While it is necessary to consider and begin to address this horizon, there will be short-term pragmatic initiatives that may be implemented to maximise the community benefits of golf.

Plan on a page

Suggested template to get started

People

Board and Staff (role clarity, shared vision)

Customer (target market of current and future users)

Consultants (experts to assist)

Investment (who funding may come from)

Problem Statement:

Benefits Statement:

Vision Operating model Master Planning Branding Investment

Vision

Customer Needs

Objectives

Outcomes

Project Plan

Operating model

Programs

Golf facilities

Ancillary facilities

Technical Reports

Feasibility

Communication Plan

Consultation

Marketing

Financial analysis

Budget

Funding sources

Timeframes

B

Appendix B: Dashboard user guide

Dashboard user guide

A dashboard has been developed to assist golf venue operators to estimate the annual value of benefits generated through activities on their site. This work builds on the [2023 Community Benefits of Golf in Australia report](#), using the same quantification techniques to estimate the contribution of individual golf venues.

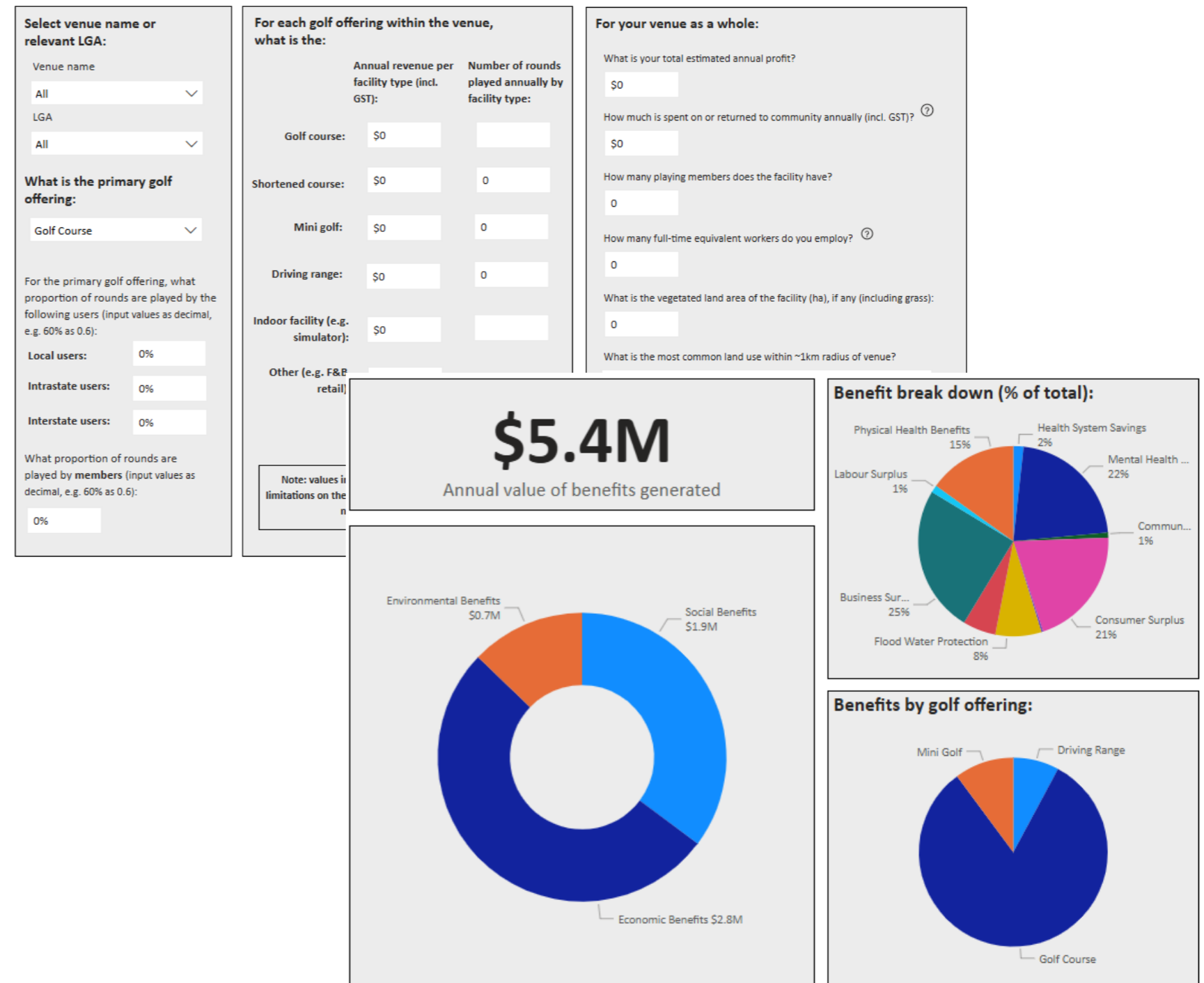
The dashboard asks users to input venue data and then generates a dollar value of annual benefits, split by golf offering (where applicable) and benefit type (economic, social and environmental). The outputs page includes a description of individual benefits. **Note, user inputs are not recorded or made visible to other users or any external operator.**

The dashboard is intended to help guide venue operators to better understand how benefits are being generated, based on the specific characteristics of their site. A limited number of user inputs were selected to prevent the dashboard becoming too cumbersome. These inputs were deemed to be the most relevant in estimating the value of benefits and will provide a useful guide for venue operators, but may not completely capture all nuances across different venues.

The AGIC encourages venues to use the dashboard to demonstrate their community benefits and share them in the following ways:

- Board and Member updates
- Business Cases
- Funding applications and sponsor proposals
- Advocacy to government and other stakeholders

The dashboard can help to demonstrate before and after scenarios of any new initiative that stakeholders may be considering and planning.



Steps and Tips

The following steps and tips are provided to assist venues using the dashboard to generate benefits. Support can be provided by the Golf Australia team, including understanding and incorporating benefits into reports.

1 Venue and LGA inputs

- Name: use dropdown or search function to find club/facility name. This field can be left blank
- LGA: use dropdown or search function. This field must be input for accuracy of benefits generated
- Select your primary golf offering – if not selected will default to Golf Course.
- If you have a golf course this should be selected as Primary offering as it will ensure environmental benefits are correctly included
- Proportion of users is entered as a decimal e.g. 60% as 0.6

2 Golf Offering inputs

- Enter \$ amount including GST and number of rounds for each golf offering.
- For Other include any other revenue generated at the facility, i.e. Food & Beverage, retail etc.
- Revenue inputs will round up or down to the nearest ten, due to the range numbers that are allowed. This does not materially impact results.

3 Whole venue inputs

- Enter Profit as excluding GST
- Spent on community includes event days, funds returned to Council/dividends, sponsoring, donations, etc
- Playing members includes
- Vegetated land area is the size of land parcel in hectares

4 Generate Report

- Click Generate Benefits and explore the results

The **report** and **dashboard** are located on the Golf Australia Website [Community Benefits of Golf | Golf Australia](#) (with the 2023 Report and dashboard)

- The cover page is a summary of the Community Benefits of Golf in Australia Report, **click on Input data** to get started on your venue Community Benefits
- **Enter your data** following the prompts on the screen. Ensure you hit enter and click into the next box. Be patient if it is a little slow, the results are worth the wait
- To delete a number/value input you will need to enter 0, or to clear all inputs **click on Reset inputs** button
- If your data value is in a negative (i.e. estimate profit is negative or 0 profit) please input 0
- Click on **Generate benefits** to explore your results. You can use **Back to inputs** button to go back and make any adjustments to the Inputs, or start again
- The text in the **Benefits table** (left) can be copied and pasted by right clicking over the box. The text is a summary of the benefit derived, for use in reports. Each venue should then add the specifics on how you generate the benefit. Use the Case Studies and Themes as examples on how to describe them.
- You can expand the size of the charts and view detail in a table format by a right click and/or click on the top right corner of each box
- Environmental Benefits are associated with the land area (ha) of golf venues and golf courses as the largest Environmental Benefit. If you receive an output of \$0 Environmental Benefits, you can address this by outlining your environmental sustainability initiatives in text in a plan, business case or report
- Use a Snipping Tool or Screenshot to export / copy the detail into reports and documents
- Remember no one else can see your data, and it is not stored anywhere

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