2022/23

Golf Participation Report

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About the Author

This report has been prepared for Golf Australia by Golf Business Advisory Services (GBAS).

Providing independence of data analysis and consistent interpretation of annual data, GBAS has authored all of past published participation reports for Golf Australia, along with a number of other leading industry reference reports.

For more information on GBAS, please visit www.golfbas.com

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Foreword

Golf is big. We've always known it, but now the numbers really support it.

Australian golf is celebrating a remarkable fourth consecutive year of participation growth, with 17.6 percent of adult Australians hitting a golf ball in 2022-23.

A staggering 3.5 million Australians played golf in the last year – at golf courses, driving ranges, simulators or mini-golf facilities, with golf club membership rising by 10.2 percent the past three years.

Club membership grew by 1.9 percent in 2022-23 to 434,825 people, following increases of 2.7 percent in 2021-22 and a record 6.4 percent surge in 2020-21.

With participation growing in all formats of the game – including entry level programs and activities – we have good cause to be optimistic that this will create a pipeline for continued club membership growth.

It is pleasing to report strong growth in underrepresented membership segments such as juniors (up 9.3 percent) and women and girls (up 12.6 percent). In recent years these categories have been of strategic focus for Golf Australia, and it is pleasing to see clubs rewarded for their recruiting efforts.

The Australian Golf Strategy reminds us of the broad spectrum of ways people participate in golf – in fact 1.3 million adult Australians played golf at an off-course facility in 2022-23. Off-course golf is clearly complementary to on-course golf and is the fuelling demand that is driving our sport's amazing growth trajectory.

Both our MyGolf program (for kids) and Get Into Golf program (for adults) have seen double digit growth. Customer feedback from these programs is incredibly positive – and credit should go to the highly skilled network of PGA Members across the country who day in day out provide fun and engaging learning experiences for beginner golfers.

MyGolf has seen a 22% year-on-year increase in participation and Get Into Golf has seen a 39% increase. We continue to encourage clubs, facilities and PGA professionals to focus strongly on introductory programs as it is clear that these quality experiences are not only valued, but create a desire for beginners to play more golf.

The Junior Girls Scholarship Program continues to thrive. With the support of the Australian Golf Foundation, the program has grown significantly over the past three years. We are anticipating over 1,100 scholars in 2024 and are excited about the way this program in not just increasing girls' participation, but creating friendship groups who are developing a life-long love of the game.

The recently released Community Benefits of Golf in Australia report demonstrates the enormous impact that our strong and growing participation base provides to our national economy. The report notes that golf accounts for $10.3b of expenditure per year, generating more than $3 billion in community benefits and highlighted by $860m of physical and mental health benefits we contribute each year.

All our leading indicators suggest that golf is enjoying a period of unprecedented growth. Not only is golf big, but it is getting bigger.

These are exciting times for golf and we have clear strategic intent for our sport and the broader golf industry. The Strategy for Australian Golf (2022-2025) is playing an integral role in maintaining the momentum that our sport currently enjoys. Together with our leading industry partners, PGA, WPGA and others, we remain committed to executing this strategy and exploring the opportunities that allow more Australians to play more golf.

Finally, these numbers are a credit to everyone that works across the industry, including PGA professionals, club and facility staff, greenskeepers, volunteer boards, retail employees, and others across Australian golf.

These people are passionate about customer service and providing great experiences through golf to Australians of ages, backgrounds, and abilities. We thank everyone in the industry for their wonderful contribution to our sport.

Best regards,

James Sutherland
Chief Executive Officer
Golf Australia

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Key Findings

GOLF AUSTRALIA

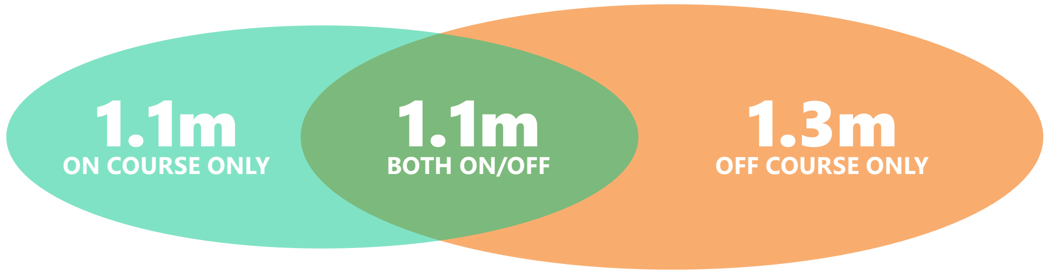
SEGMENT PARTICIPATION

Swinburne University Golf Participation Study

434,825	1,780,000	1,360,000	395,000	900,000
Golf club members	Played a round of golf	Use outdoor hitting facilities	Use indoor hitting facilities	Played mini golf

GOLF TOTAL PARTICIPATION

Swinburne University Golf Participation Study



CLUB MEMBERSHIP

(incl. Social Clubs)

434,825

New members **8,045**

increase from FY22 **1.9%**

164,088 Metropolitan club members **204 clubs**

238,950 Regional club members **1,083 clubs**

31,787 Social club members

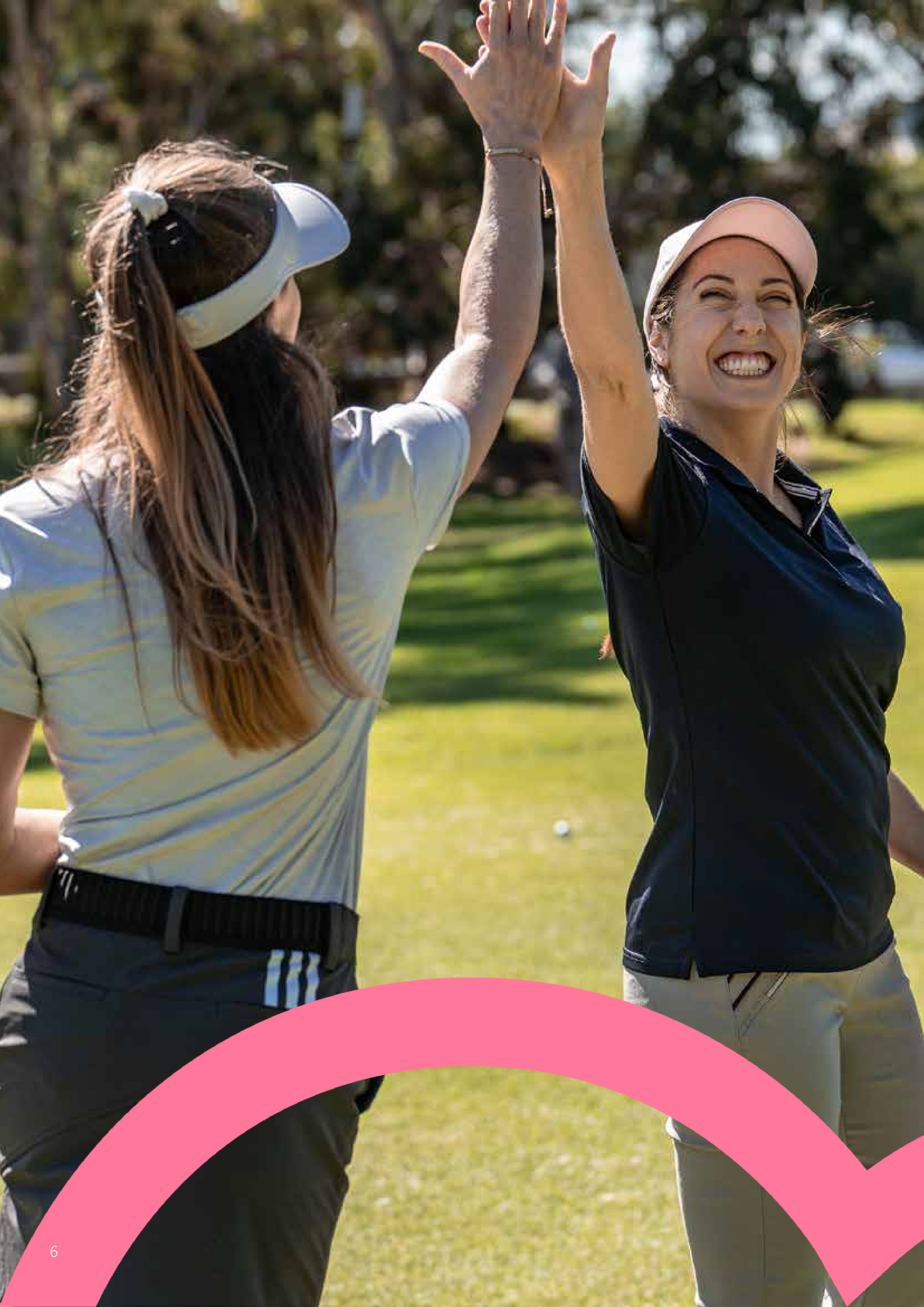
MEMBERSHIP GROWTH

By state since FY21 (excl. Social Clubs)

NSW	VIC	QLD	SA	WA	TAS	NT
1.6%	0.9%	2.2%	0.6%	2.3%	5.0%	-7.0%
161,414	103,707	69,363	26,055	28,444	12,070	1,985

Growth in PARTICIPATION PROGRAMS

My golf	GET INTO GOLF	COMMUNITY INSTRUCTOR ACCREDITATIONS	DISABILITY INCLUSION PROGRAM
22%	39%	1%	36%
33,090 PARTICIPANTS	15,097 PARTICIPANTS	1,771 INSTRUCTORS	3,896 PARTICIPANTS



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Report Background

INTRODUCTION

Golf Australia continues to provide the golf industry with information that enables an understanding of the current landscape and trends with regards to golf participation. This 10th edition of the National Club Participation Report is a key component in Golf Australia's industry communication strategy.

This report measures the overall health of the game from a participation perspective and remains an invaluable reference as clubs and other industry stakeholders seek to understand current trends. With knowledge of these trends, evidenced-based strategies can be developed that seek to enhance demand and increase the game's long-term popularity.

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Golf Participation

GOLF AUSTRALIA NATIONAL REPRESENTATIVE RESEARCH

During 2023 Golf Australia has conducted research supported by the Sport Innovation Research Group at Swinburne University to measure participation in all forms of golf. This research allows the industry to understand the ways in which golf is being played and the behaviours and characteristics within golf's participation base.

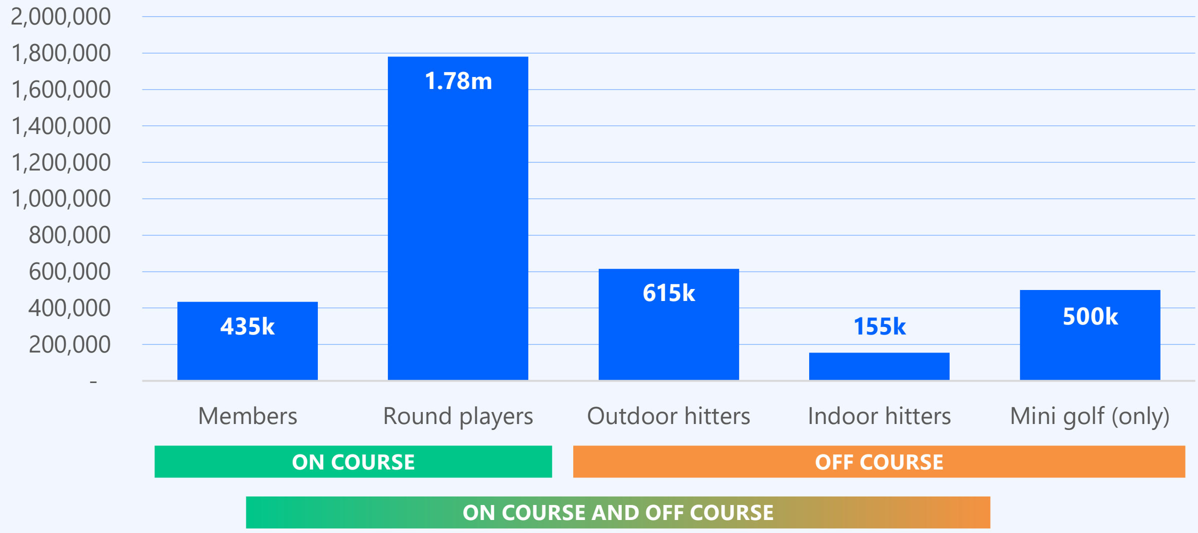
This research has found that off course participation numbers now exceed those participating on course. Further, a higher percentage of women and younger people are playing off-course than on course.

Chart 1 illustrates the current golf participation mix.

Chart 1: Golf participation (individuals can participate in more than one form)

Source: Golf Australia National Representative Research (Oct 2023)

Chart 2: Discrete golf segments (individuals only counted once)



Source: Golf Australia National Representative Research (Oct 2023)

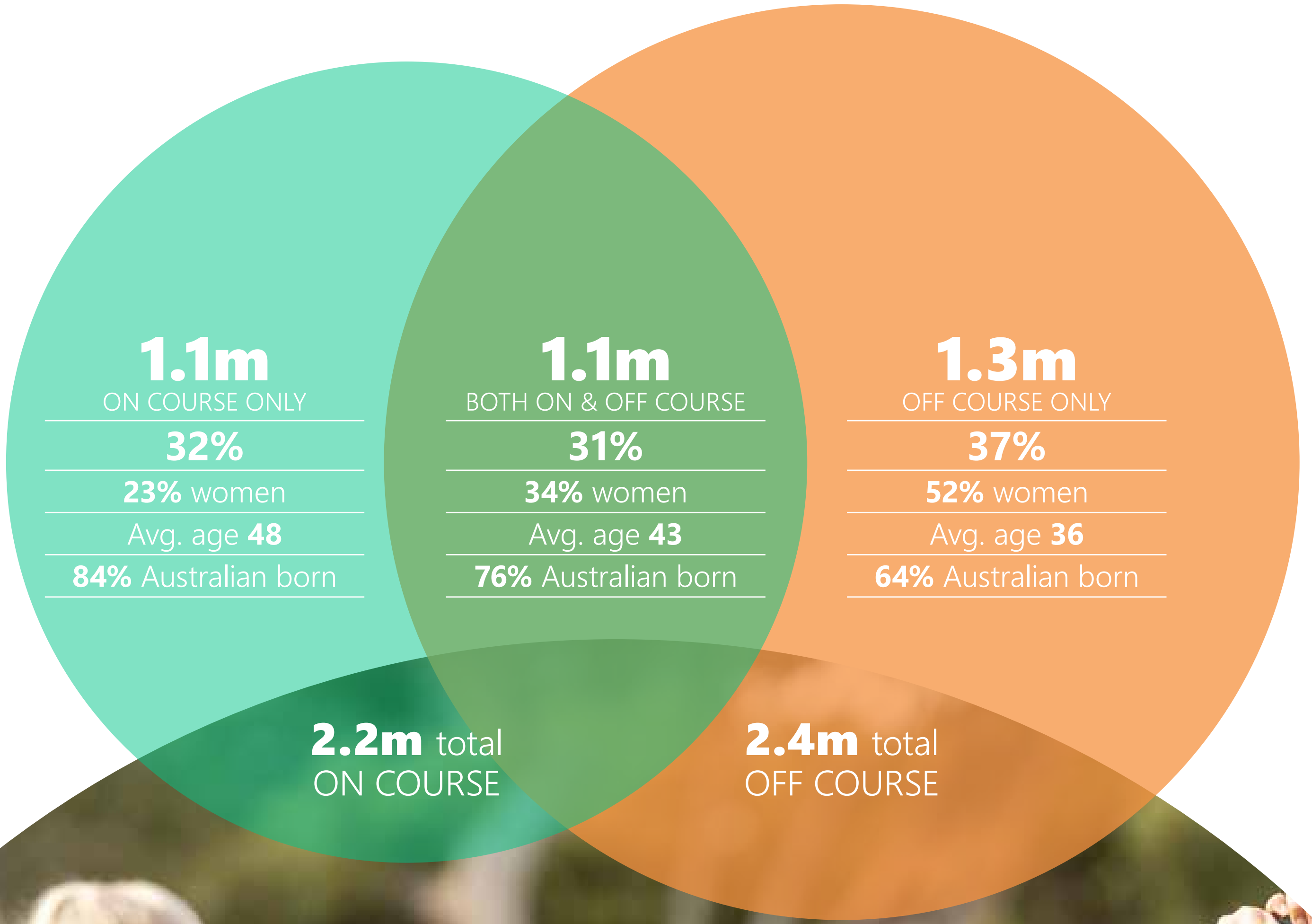
The research shows that golfers can be split into three types, those who play only on course, those who play only off course and those who play both.

It is acknowledged that off course golf serves as a gateway to on course golf, and therefore if we are to count individual golfers once, as shown in Chart 2, we follow the participation journey with these definitions.

- **Members** - A golf club member
- **Round Players** - Not a club member, played a 9-18 hole round of golf (incl. short courses)
- **Outdoor Hitters** - No on course golf, but played at a driving range or outdoor practice/ entertainment centre
- **Indoor Hitters** - No on course golf, no outdoor practice, but played at a simulation or indoor training centre
- **Mini Golf (only)** - Only played mini golf

Chart 3: Golf activity engagement - % playing each form of golf (national profile)

Source: Golf Australia National Representative Research (Oct 2023), Swinburne University of Technology



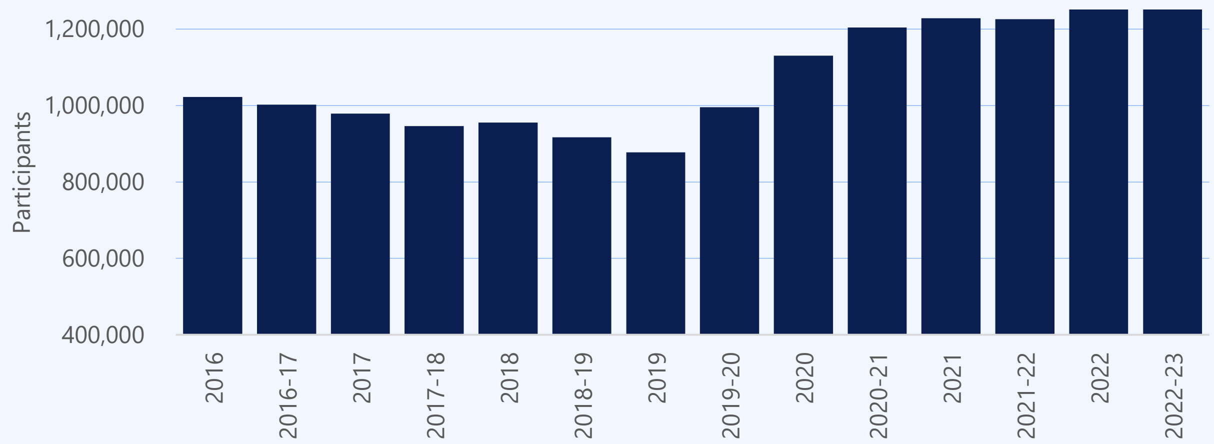
AUSPLAY GOLF PARTICIPATION DATA

AUSPLAY GOLF PARTICIPATION DATA

Results from the latest (2022-23) Ausplay National Participation Survey have recently been released by Sport Australia. The release is the 10th in the series since the survey was resurrected and the third to include the Covid-19 period. The annual data presented is a valuable reference point for understanding overall participation levels in golf and those in other sports.

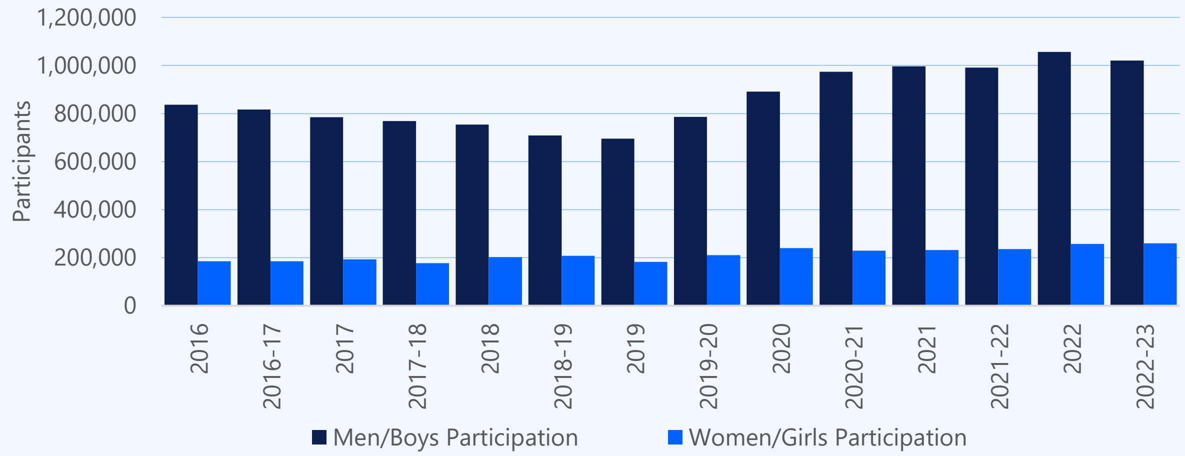
Participation in golf has maintained its post-pandemic rate, with over 1.2 million participants recorded over the last four reporting periods. An additional 230,000 people are playing the game compared to participation levels pre-pandemic with an overall market participation rate of 5.8%. Men/boys participation has reached 9.4% of the population (over 15), with women/girls participation steady at 2.3%, as is their share of market at 19% of all golfers.

Chart 4: Annual golf participants



Source: AusPlay

Chart 5: Annual golf participants by gender



Source: AusPlay

05 Annual Programs

Golf Australia delivers a number of industry development programs. Annual results for these programs are detailed following.

MYGOLF PROGRAM

MyGolf is Australia's national junior introductory program to develop and promote participation in golf. The MyGolf program is designed for 5 to 12 year old children and is the major driver of junior golf participation in Australia.

The MyGolf program recorded a 22% increase in participation in 2022/23, as active centres increased by 4% over the year. Significant growth in player numbers was seen in Victoria and Queensland, with 27 additional centres added in NSW and Victoria. Year end MyGolf participation numbers, programs and active centres are summarised in Table 1 and Table 2 below.

Considering your complete experience with MyGolf, how likely would you be to recommend the program for children of a friend or family member?

NET PROMOTER SCORE

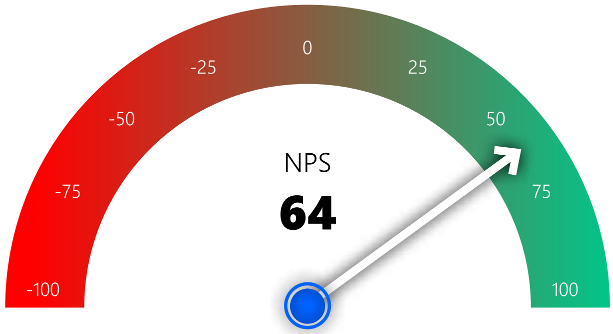


Table 1: MyGolf Participants

	2021/22	2022/23	% change	Programs
NSW	2,206	3,104	41%	454
NT	488	715	47%	48
QLD	11,453	12,019	5%	1,261
SA	1,858	2,460	32%	370
TAS	1,166	1,476	27%	188
VIC	7,556	10,939	45%	1,614
WA	2,441	2,377	-3%	356
Total	**27,168**	**33,090**	**22%**	**4,291**

Table 2: MyGolf Centres

	2021/22	2022/23	% change	Registered Centres
NSW	59	69	17%	117
NT	8	8	0%	10
QLD	99	86	-13%	132
SA	44	47	7%	58
TAS	25	24	-4%	32
VIC	134	151	13%	214
WA	43	44	2%	48
Total	**412**	**429**	**4%**	**611**

39% INCREASE IN TOTAL PARTICIPANTS

19% INCREASE IN TOTAL PROGRAMS DELIVERED

38% INCREASE IN TOTAL WOMEN/GIRLS PARTICIPANTS

GET INTO GOLF

Get Into Golf's ambition is simple - to connect interested participants with their local golf program and help bring new people into our sport and facilities. Growth in all key metrics was achieved in 2022/23 including;

- a 39% increase in total participants
- a 38% Increase in total women/girls participants
- a 11% increase in active centres
- a 19% increase in total programs delivered

High engagement from women/girls continues to be seen with 84% of total participants. 26% of program participants were identified as being born overseas as golf expands it reach into all community groups.

Considering your complete experience with Get Into Golf, how likely would you be to recommend the program to a friend or family member?

NET PROMOTER SCORE

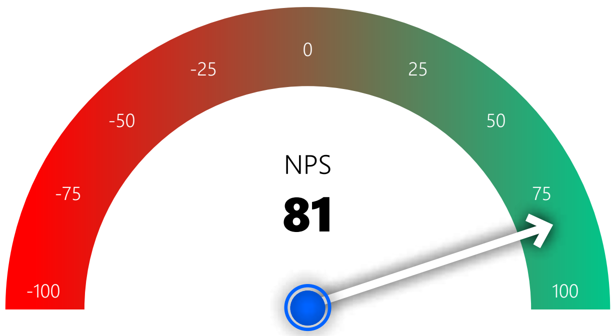


Table 3: Get Into Golf participants, programs and registered centres

	Total Participants 2021/22	Total Participants 2022/23	% change	Programs	% Women/ Girls	Active Centres	Registered Centres
NSW	603	1,058	75%	215	95%	43	90
NT	204	358	75%	30	91%	5	10
QLD	3,955	5,482	39%	716	89%	66	135
SA	692	716	3%	155	82%	32	60
TAS	853	827	-3%	182	83%	23	35
VIC	3,984	6,021	51%	932	80%	115	212
WA	592	635	7%	68	69%	16	39
Total	**10,883**	**15,097**	**39%**	**2,298**	**84%**	**300**	**581**

COMMUNITY INSTRUCTOR PROGRAM

The Community Instructor program aims to increase capacity through predominantly a volunteer workforce to deliver MyGolf, Schools and Get Into Golf programs. Community Instructors complete an online training and accreditation course, with this being supported by practical training offerings delivered by PGA Professionals, to further build their confidence in delivery of these national programs.

There are currently three online course offerings – the general Community Instructor accreditation enabling the delivery of all national participation programs, the All-Abilities course as an addition to that enables the delivery of MyGolf and Get Into Golf All abilities programs by those with experience working with special needs, and the MyGolf Teacher accreditation customised for teacher delivery of MyGolf in Schools.

FY 2022/23 has seen the greatest number of active Community Instructors involved in the delivery of programs, either supporting their local PGA Professional, or in regional areas without PGA Professionals, providing a fun and games-based entry point to the game for beginners that would not otherwise be available. The Community Instructor program is an area enjoying significant engagement from women/girls with 46% of total active participants. By year end a 1% increase in total accreditations was achieved, with 6% increase in Community Instructors. School led instructors fell by 27%.

Table 4: Community Instructor program accreditations

	2018/19	2019/20	2020/21	2021/22	2022/23	1 Year
Community Instructor	744	646	1,027	1,316	1,397	6%
MyGolf School Teacher	321	236	271	303	222	-27%
Practical Training	-	-	-	-	34	0%
All Abilities*	-	-	50	128	118	-8%
Total	**1,065**	**882**	**1,348**	**1,747**	**1,771**	**1%**

Table 5: Community Instructor program accreditations by state

	Community Instructor	MyGolf School Teacher	All Abilities	Total
NSW	307	37	23	367
NT	50	1	3	54
QLD	237	36	34	307
SA	156	23	7	186
TAS	66	14	9	89
VIC	478	83	34	595
WA	103	29	9	141
Overall	**1,397**	**223**	**119**	**1,739**

PGA PROFESSIONALS AND PROGRAM DELIVERY

Nationally, there are 1,663 PGA Professionals and 399 Membership Pathway Program members (Trainees) that are available to deliver MyGolf, Schools & Get Into Golf programs.

In 2022/23, there were 5,292 programs delivered by PGA Professionals & PGA Associates, with 281 programs co-delivered by PGA Members and Community Instructors.

Table 6: Programs delivered by PGA Professionals/Associates in 2022/23

	MyGolf	Schools	Get Into Golf	Total
PGA Delivered				
Number of programs	3,178	249	1,865	5,292
% of programs	82%	44%	82%	79%
PGA co-delivered with Community Instructor				
Number of programs	170	-	111	281
% of programs	4%	-	5%	4%

DISABILITY INCLUSION PROGRAM

Golf Australia remains committed in becoming a sport of choice for people living with a disability in Australia.

Through Golf Australia's entry level programs MyGolf and Get Into Golf, 66% of registrations of people who identified as living with disability participated in mainstream program offerings. This number highlights the inclusive design of the sport and the flexibility of both MyGolf and Get Into Golf offerings to cater for Australians with all levels of ability.

Strategically, Golf Australia will continue to engage Australians living with disability into golf through MyGolf, Get Into Golf and our network of PGA All Abilities Coaches and Community Instructors.

The Community Instructor – All Abilities Module, assisting in providing further capacity for volunteers to get involved in the delivery of MyGolf All Abilities and Get Into Golf All Abilities programs has now accredited a further 280 volunteers from the disability sector enrolled and or completed the module designed for deliverers offering MyGolf or Get Into Golf All Abilities Programs.

In an extension of the All Abilities pathway, Golf Australia now runs more World Ranking Events for Golfers with a Disability than any other National Federation across the world. New state championships have been run in Tasmania and South Australia with additional events also taking place in NSW and WA to take the number of World Ranking events to 12.

By year end a 36% increase in total participants had been recorded with 86 programs offered across the year.

Table 7: All Abilities and Senior participants and programs by state

	Total All Abilities Participants 2021/22	Total All Abilities Participants 2022/23	% change	All Abilities Programs	Total Senior Participants 2021/22	Total Senior Participants 2022/23	Senior Programs
NSW	30	30	0%	5	93	70	7
NT	18	42	133%	-	1	76	5
QLD	710	1,008	42%	15	81	91	19
SA	275	357	30%	-	62	43	10
TAS	575	471	-18%	1	45	7	1
VIC	1,144	1,848	62%	51	301	114	24
WA	120	140	17%	14	22	10	3
Total	**2,872**	**3,896**	**36%**	**86**	**605**	**411**	**69**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2022/23 Club Membership

STATE GOLF ASSOCIATION REPORTING

Club golfer numbers are reported annually by the seven state and territory golf association bodies, five of which are operated by Golf Australia. Reported numbers reflect members who pay a capitation fee to their respective body, generally defined as those classified as having a class of membership that provides regular golf course access. Individuals that have a membership (and pay a capitation fee) at more than one club will therefore be counted multiple times.

The respective reporting periods and the respective membership timing they represent are summarised in Table 8.

DEFINITIONS

The following terms, which are referenced in various places throughout the report, are defined as follows:

- **Member Clubs** - clubs that are fully affiliated with the relevant state body
- **Social Clubs** - registered clubs without full affiliation, which typically play in allotted tee times at public courses but may also be 'virtual' in nature, that is, creating handicaps for their members to play in any event at any course
- **Small Clubs** - Member clubs with 500 or fewer members
- **Medium Clubs** - Member clubs with 501 to 1,000 members
- **Large Clubs** - Member clubs with over 1,000 members

Table 8: State reporting periods and membership timing

State	Data Collected	Numbers relate to...
NSW (includes ACT)	June 2023	Most recent completed financial year
VIC	December 2022	Point in time of collection
QLD	December 2022	Point in time of collection
SA	December 2022	Point in time of collection
WA	December 2022	Point in time of collection
TAS	June 2023	Point in time of collection
NT	September 2022	Point in time of collection

PLAYING MEMBERS – OVERALL RESULTS

Members by State

National membership numbers across Australia for the year 2022/23 are reported as 434,825. This result represents a 1.9% increase (8,195 members) from 2021/22.

Following from the record outcomes of 2020/21, this marks the third consecutive period of growth in membership numbers at Australian golf clubs and is the first time since 1994 that annual growth has been recorded in three consecutive years.

Increases in membership were evident in all markets and segments. Member clubs grew by 1.6%, with social club growth of 6.4% recorded. By gender, growth in men and women golfers was 1.7% and 1.4% respectively. Junior numbers also enjoyed growth, with numbers increasing by 9.3% over the prior year.

6.4% INCREASE IN SOCIAL CLUB MEMBERS

1.9% INCREASE IN MEMBERSHIP NUMBERS

434,825 TOTAL MEMBERSHIP NUMBERS

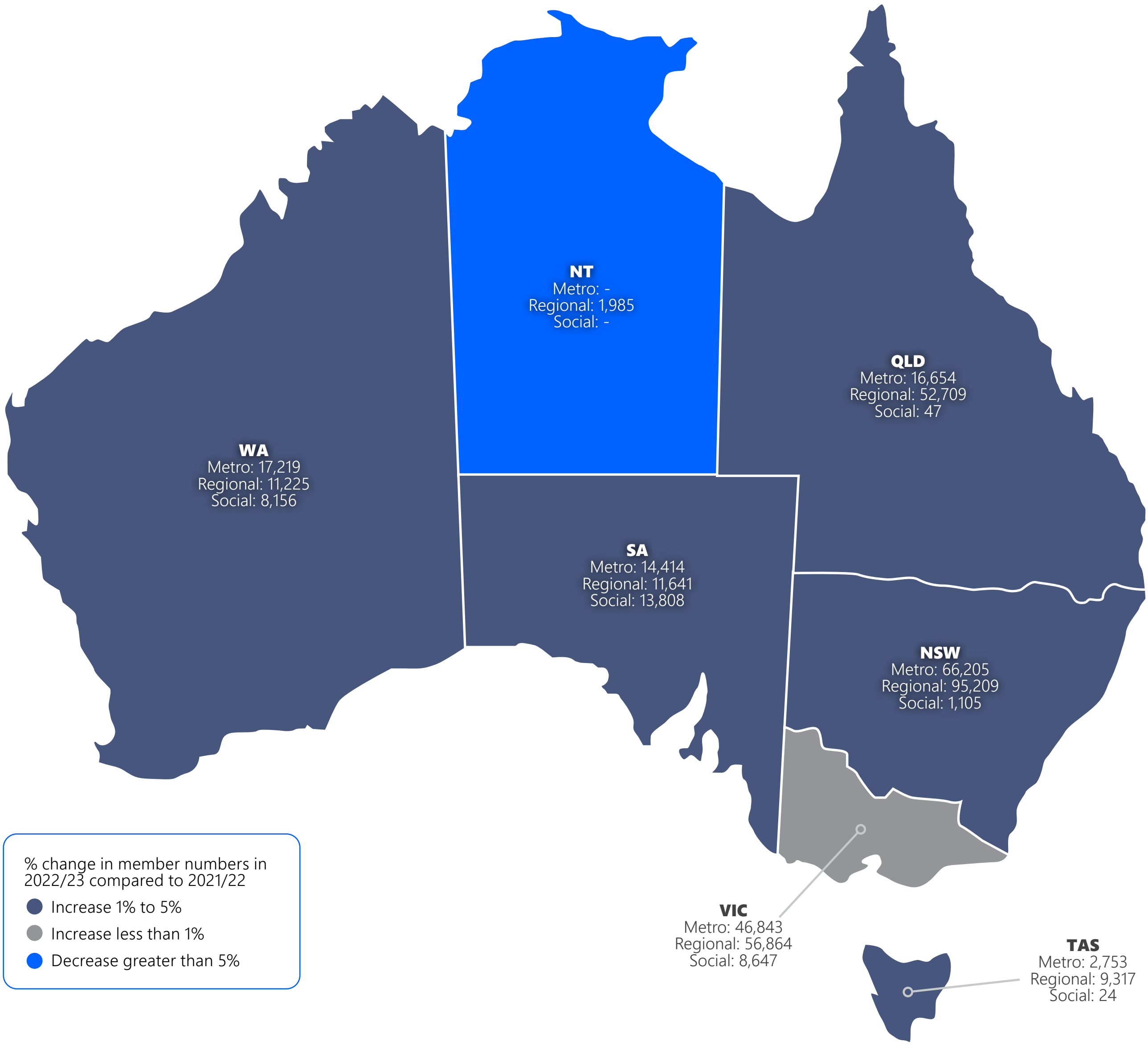


Table 9: 2022/23 results by key cohort

	NSW	VIC	QLD	WA	SA	TAS	NT	Overall	% change over 2021/22
Metropolitan	66,205	46,843	16,654	17,219	14,414	2,753	0	164,088	1.5%
Regional	95,209	56,864	52,709	11,225	11,641	9,317	1,985	238,950	1.6%
Social	1,105	8,647	47	8,156	13,808	24	0	31,787	6.4%
	162,519	**112,354**	**69,410**	**36,600**	**39,863**	**12,094**	**1,985**	**434,825**	**1.9%**
Men	126,674	85,983	53,985	28,101	32,969	9,617	1,591	338,920	1.6%
Women	28,848	21,563	12,474	7,459	5,529	1,938	329	78,140	1.4%
Adult Total	**155,522**	**107,546**	**66,459**	**35,560**	**38,498**	**11,555**	**1,920**	**417,060**	**1.6%**
Boys	5,937	4,172	2,205	816	1,151	477	49	14,807	9.7%
Girls	1,060	636	746	224	214	62	16	2,958	7.1%
Junior Total	**6,997**	**4,808**	**2,951**	**1,040**	**1,365**	**539**	**65**	**17,765**	**9.3%**
Total Men/Boys	132,611	90,155	56,190	28,917	34,120	10,094	1,640	353,727	1.9%
Total Women/Girls	29,908	22,199	13,220	7,683	5,743	2,000	345	81,098	1.6%
Total	**162,519**	**112,354**	**69,410**	**36,600**	**39,863**	**12,094**	**1,985**	**434,825**	**1.9%**
% Change over 2021/22	**1.4%**	**0.9%**	**1.9%**	**3.4%**	**5.0%**	**5.0%**	**-7.0%**	**1.9%**	

Source: Golf Australia & member golf associations

Table 10: Australia 5-year trend by cohort

Type	**2017**	**2018**	**2019**	**2020**	**2021/22**	**2022/23**	**% Change**
Metropolitan	148,680	147,334	147,698	158,119	161,601	164,088	1.5%
Regional	214,458	213,657	213,613	229,802	235,294	238,950	1.6%
Total Member Clubs	**363,138**	**360,991**	**361,311**	**387,921**	**396,895**	**403,038**	**1.5%**
Social	18,690	19,546	23,302	27,435	29,885	31,787	6.4%
Total Members	**381,828**	**380,537**	**384,613**	**415,356**	**426,780**	**434,825**	**1.9%**
Gender							
Men	294,310	294,130	298,687	325,659	333,478	338,920	1.6%
Women	74,907	73,234	72,682	74,117	77,042	78,140	1.4%
Boys	10,449	10,859	10,951	13,073	13,497	14,807	9.7%
Girls	2,162	2,314	2,293	2,507	2,763	2,958	7.1%
Total	**381,828**	**380,537**	**384,613**	**415,356**	**426,780**	**434,825**	**1.9%**
Members by age							
Toal Adults	369,217	367,364	371,369	399,776	410,520	417,060	1.6%
Total Juniors	12,611	13,173	13,244	15,580	16,260	17,765	9.3%
Total Men/Boys	304,759	304,989	309,638	338,732	346,975	353,727	1.9%
Total Women/Girls	77,069	75,548	74,975	76,624	79,805	81,098	1.6%
Total	**381,828**	**380,537**	**384,613**	**415,356**	**426,780**	**434,825**	**1.9%**

Source: Golf Australia & member golf associations

PROFILE OF AUSTRALIAN CLUBS

Overall facilities

1,287 member clubs reported membership numbers for 2022/23. Key observations noted from the size profile data outlined in Table 11 includes:

- 77% are classified as small clubs, having less than 500 members.
- 84% (1,097) are in a regional area, with 72% of those clubs being classified as small clubs.
- 16% are located in a metropolitan area, only 5% of the total (66) being classified as large clubs (i.e. over 1,000 members).

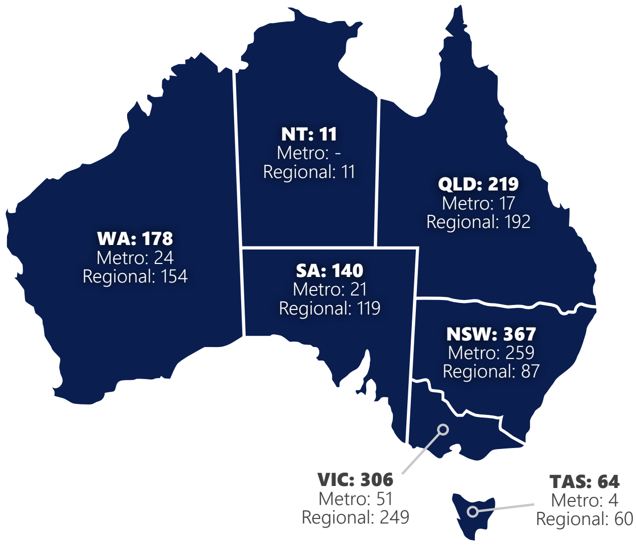


Table 11: Club size profile by geographic area

	NSW	VIC	QLD	WA	SA	TAS	NT	Total	% of Segment	% of Total
Metropolitan										
Small	28	11	4	6	9	1	0	59	29%	5%
Medium	37	16	5	12	6	3	0	79	39%	6%
Large	22	24	8	6	6	0	0	66	32%	5%
Total Metropolitan	**87**	**51**	**17**	**24**	**21**	**4**	**0**	**204**	**100%**	**16%**
Regional										
Small	215	222	162	150	117	57	10	933	86%	72%
Medium	44	27	30	4	2	3	1	111	10%	9%
Large	21	6	10	0	0	2	0	39	4%	3%
Total Regional	**259**	**249**	**192**	**154**	**119**	**60**	**11**	**1,083**	**100%**	**84%**
Total										
Small	243	233	166	156	126	58	10	992	77%	77%
Medium	81	43	35	16	8	6	1	190	15%	15%
Large	43	30	18	6	6	2	0	105	8%	8%
Total Member Clubs	**367**	**306**	**219**	**178**	**140**	**66**	**11**	**1,287**	**100%**	**100%**

Source: Golf Australia & member golf associations

PLAYING MEMBERS – KEY SEGMENTS

Member Clubs

The overall national movement in 2022/23 for member clubs (the aggregate of metropolitan and regional clubs) was an increase of 1.6%. All states enjoyed growth, 5% growth was enjoyed in Tasmania, with WA and Queensland both recording growth of over 2%.

Social Clubs

Consistent with the past five years, growth was again seen in Social club members, increasing by 6.4% over the year. With average annual growth of 11% recorded over the past five years, Social club members now account for 7.0% of total members across Australia.

Growth in social clubs in South Australia is due to increases for Future Golf and Social Golf Australia, both of which are large social clubs that are affiliated in South Australia.

Metropolitan Clubs

Metropolitan clubs recorded an overall increase in members of 1.5%. All states recorded growth over the prior year, with Tasmania and Queensland metropolitan areas recording the strongest results with growth of 8.2% and 3.6% respectively.

Regional Clubs

Regional clubs recorded an average increase of 1.6%. Growth was evident in all states, led by 4% growth in Tasmania.

Table 12: Member clubs

	2022/23	% Change
NSW	161,414	1.6%
VIC	103,707	0.9%
QLD	69,363	2.2%
WA	28,444	2.3%
SA	26,055	0.6%
TAS	12,070	5.0%
NT	1,985	-7.0%
Overall	**403,038**	**1.5%**

Source: Golf Australia & member golf associations

Table 13: Social clubs

	2022/23	% Change
NSW	1,105	-17.2%
VIC	8,647	0.2%
QLD	47	-78.5%
WA	8,156	7.3%
SA	13,808	14.4%
TAS	24	-20.0%
NT	-	-
Overall	**31,787**	**6.4%**

Source: Golf Australia, member golf associations
NB: There are no affiliated Social Clubs in the Northern Territory.

Table 14: Metropolitan clubs

	2022/23	% Change
NSW	66,205	1.3%
VIC	46,843	0.8%
QLD	16,654	3.6%
WA	17,219	2.4%
SA	14,414	0.5%
TAS	2,753	8.2%
NT	-	
Overall	**164,088**	**1.5%**

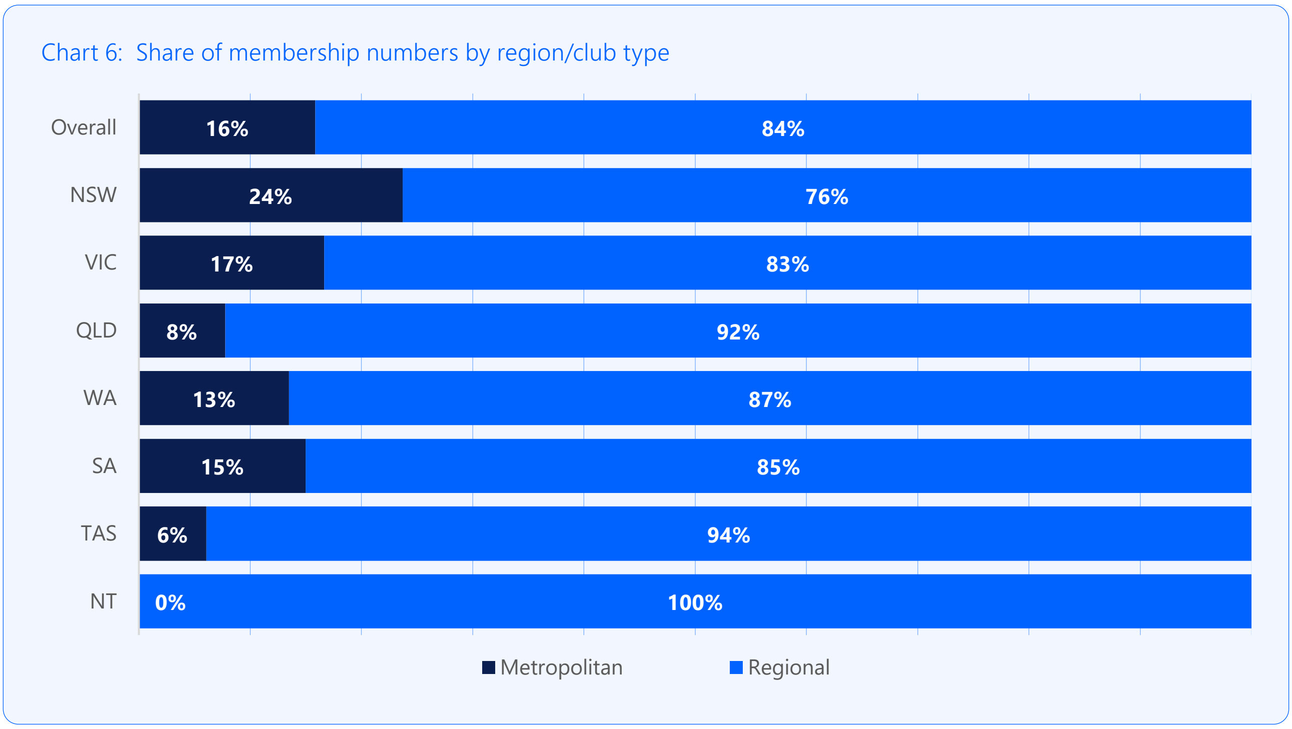
Source: Golf Australia, member golf associations
NB: This table excludes social clubs.

Table 15: Regional clubs

	2022/23	% Change
NSW	95,209	1.8%
VIC	56,864	1.0%
QLD	52,709	1.7%
WA	11,225	2.2%
SA	11,641	0.7%
TAS	9,317	4.2%
NT	1,985	-7.0%
Overall	**238,950**	**1.6%**

Source: Golf Australia, member golf associations
NB: This table excludes social clubs.

The share of membership numbers by region for each state is illustrated in Chart 6.



Members by Gender

Total men/boys and women/girls members increased by 1.7% and 1.4% respectively in 2022/23. Men/boys growth was particularly strong in SA (6%), and TAS (3%), with highest rates of women/girls growth recorded in TAS (11%), and QLD (5%).

The resultant gender mix reported for 2022/23 sees women/girls share of membership remain at 19% of total members. Women/girls share of member numbers is above the national average in Victoria (20%) and WA (21%).

1.7%
MEMBERSHIP GROWTH MEN/BOYS

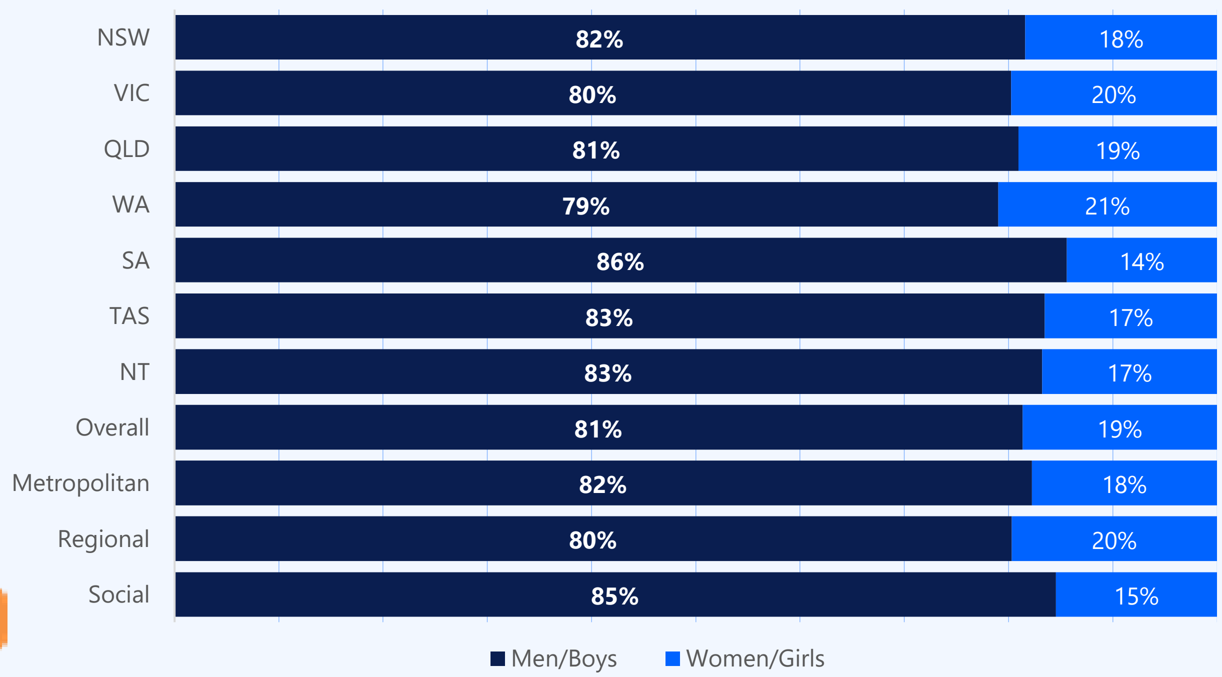
1.4%
MEMBERSHIP GROWTH WOMEN/GIRLS

Table 16: Men/boys and women/girls members by state

State	Men/Boys	% Change	Women/Girls	% change
NSW	126,674	1.2%	28,848	0.6%
VIC	85,983	0.4%	21,563	0.0%
QLD	53,985	1.3%	12,474	4.6%
WA	28,101	3.4%	7,459	2.7%
SA	32,969	5.7%	5,529	0.3%
TAS	9,617	3.4%	1,938	10.8%
NT	1,726	0.0%	343	0.0%
Overall	**339,055**	**1.7%**	**78,154**	**1.4%**

Source: Golf Australia, member golf associations

Chart 7: Gender mix by location

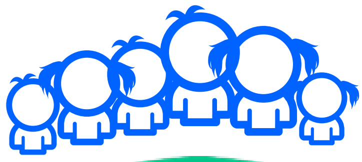


Source: Golf Australia, member golf associations

Juniors

Junior members (under the age of 18) totalled 17,766 in 2022/23, which represents an increase of 9.3% over the prior year. This positive result was driven by reported outcomes in Victoria (+15%) and NSW (+8%) which combined had 1,170 new junior members join their clubs.

Overall junior members represent 4.1% of the total member count across the country. Junior representation is slightly higher at regional clubs (4.4%) than metropolitan clubs (4.2%). Tasmania has the highest share of Junior golfers, representing 4.5% of all club golfers.



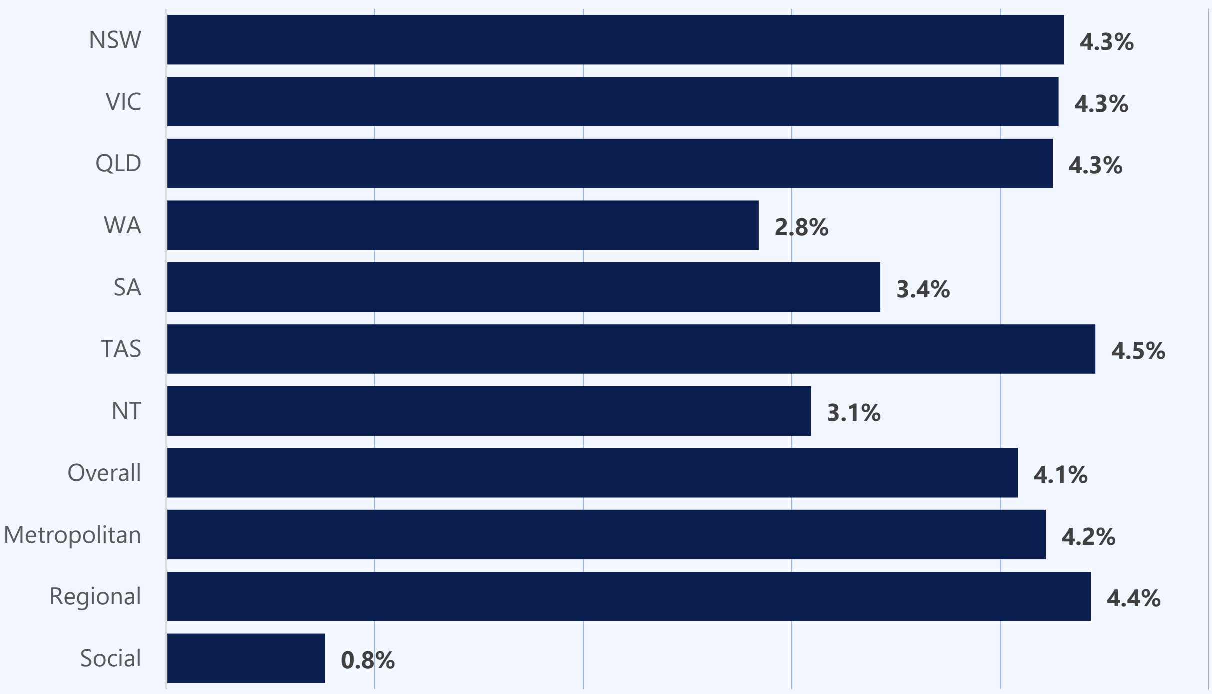
9.3%
JUNIOR MEMBERSHIP GROWTH

Table 17: Junior members by location

State	Boys	% change	Girls	% change
NSW	5,937	9.8%	1,060	1.0%
VIC	4,172	16.1%	636	8.2%
QLD	2,205	1.3%	746	10.8%
WA	816	6.5%	224	14.9%
SA	1,151	7.1%	214	5.4%
TAS	477	10.9%	62	55.0%
NT	49	-3.9%	16	6.7%
Overall	**14,807**	**9.7%**	**2,958**	**7.1%**

Source: Golf Australia, member golf associations

Chart 8: Juniors as a percentage of total members by club location



Source: Golf Australia, member golf associations

MEMBER ATTRACTION & ATTRITION

Utilising data from GolfLink, annual national club (excluding Social Clubs) attraction & attrition rates can be calculated. Adopting a methodology that utilises active member counts (1 or more club competition rounds) and new member counts assessed against prior year closing member counts these rates can be accurately calculated.

The attraction rate refers to the proportion of new members (with no prior GolfLink history) that joined within the prior 12-month period. This calculation does not include members transferring clubs. The Attrition rate refers to the proportion of total members from the prior year that were not active in the current year.

Table 18 depicts the relevant attraction and attrition rates by state. Reflecting the growing overall golf in club member numbers the national member attraction rate in the last 12 months was 11%, offset by only a 4% attrition rate.

Table 19 depicts attraction and attrition rates by age group. Evidencing a similar pattern to total new members by age group, strong net double digit growth has been recorded in the younger age groups up to 50 years of age. Net gains decline as the age cohort increases.

Table 18: Attraction and attrition rates by state

State	% Attraction	% Attrition	Net Gain
NSW	9%	4%	5%
NT	18%	9%	9%
QLD	13%	4%	9%
SA	11%	4%	6%
TAS	10%	3%	7%
VIC	10%	2%	8%
WA	11%	6%	6%
Total	**11%**	**4%**	**7%**

Table 19: Attraction and attrition rates by age group

Age Group	% Attraction	% Attrition	Net Gain
10 - 19yrs	29%	4%	25%
20 - 29yrs	27%	2%	25%
30 - 39yrs	17%	3%	14%
40 - 49yrs	15%	3%	12%
50 - 59yrs	12%	3%	9%
60 - 69yrs	8%	3%	5%
70 - 79yrs	3%	4%	-1%
80 yrs +	0%	9%	-10%
Total	**11%**	**4%**	**7%**

PLAYING MEMBER AGE PROFILE

Member Age Profile

The average reported age of club members across Australia is 55.6 years, which is reasonably consistent by state. Men/boys have an average age of 53.9 years (56.4 last year) with women/girls averaging 18% higher at 63.8 years (64.3 last year).

Age Pyramid – Members Versus Population by Gender

Chart 10 illustrates the current mix of club members by gender compared to the broader national population above 10 years of age. Evidencing golf's appeal to the older age cohorts, it shows a material portion of club members in the 50 to 79 year cohort - 62% of men and 81% of women - versus a lower national population share of this cohort of only 35%.

New Member Age Profile

New members to club golf generally exhibit a younger age profile than the broader club member age profile. In 2022/23, the average age of new men/boys members averaged 41 years, new women/girls averaging 52 years of age. Approximately 70% of new members were under the age of 50 compared to 41% for existing members.

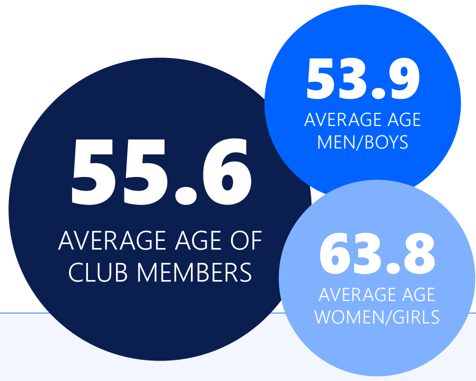
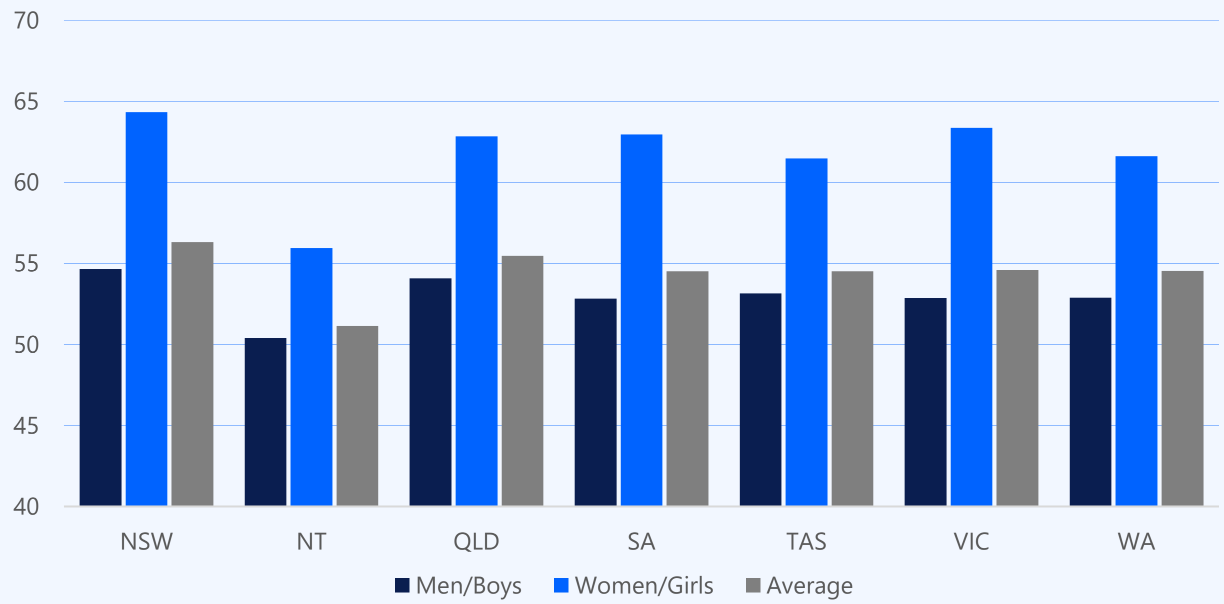
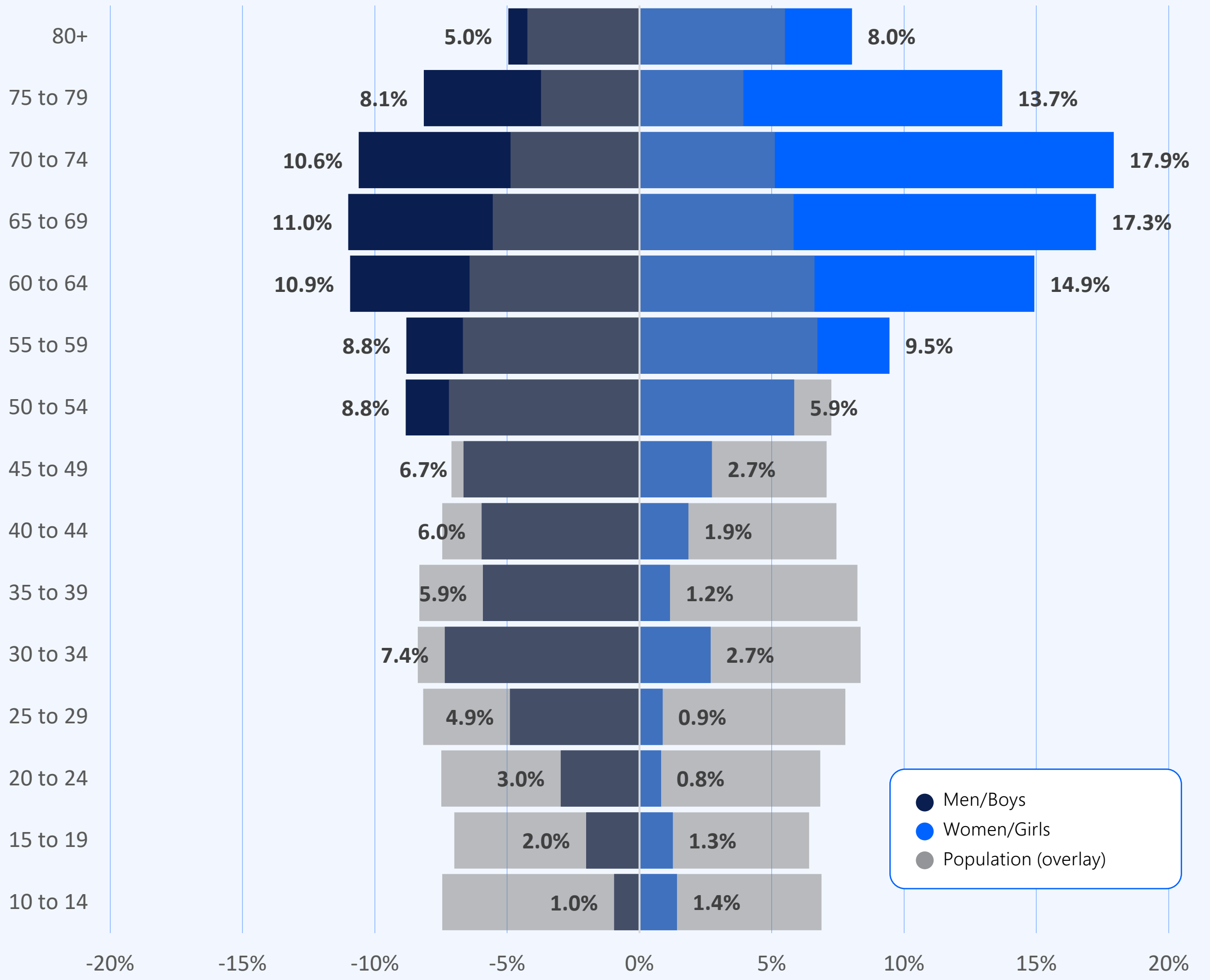


Chart 9: Average member age by state



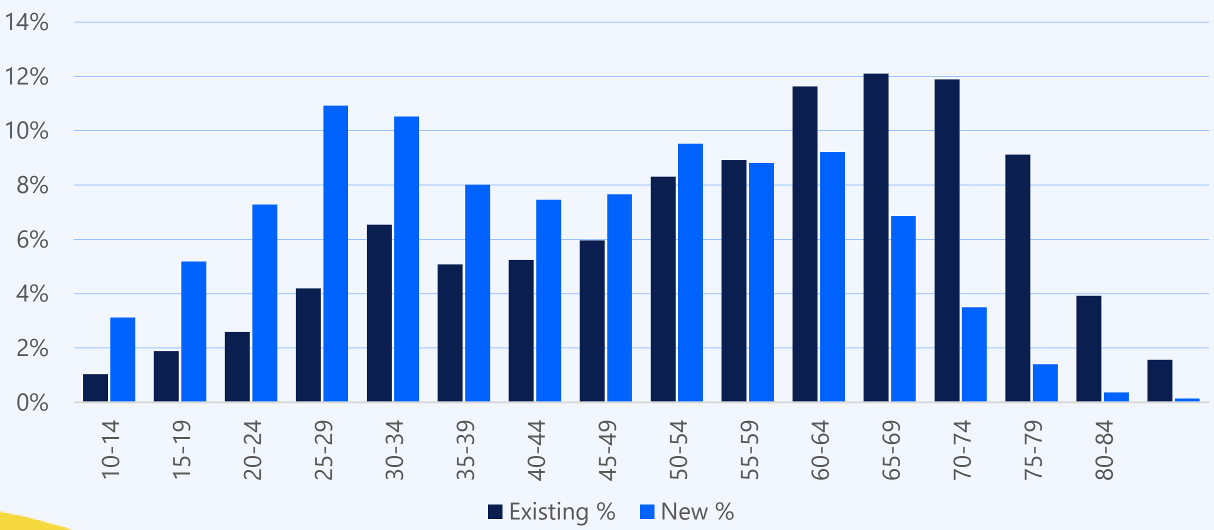
Source: GOLF Link

Chart 10: Age pyramid, members versus population



Source: GOLF Link

Chart 11: New member age profile compared to existing members



Source: GOLF Link

07

Playing Members: Results by state-based districts

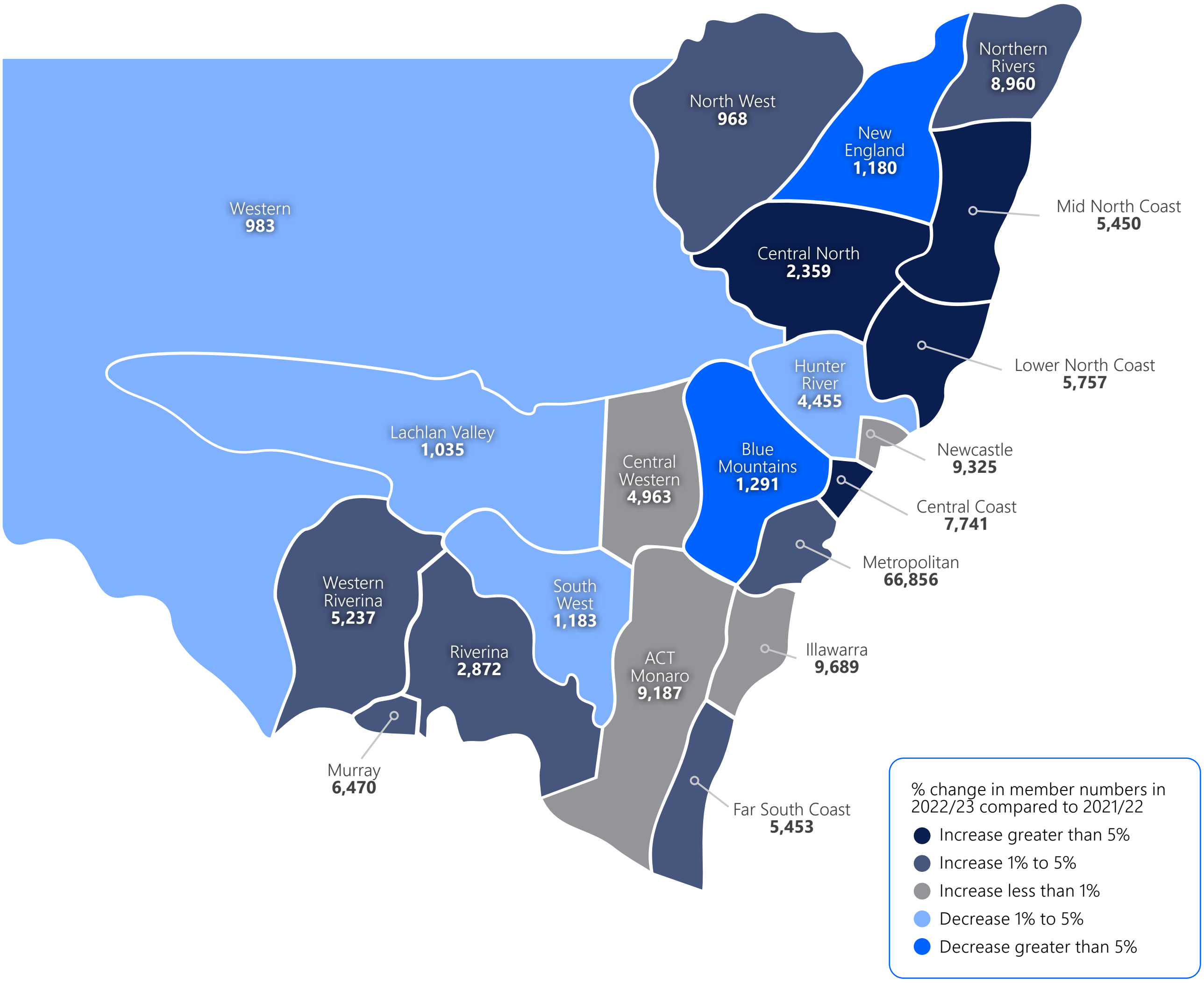
NEW SOUTH WALES

12 of the 21 districts in NSW experienced a net increase in membership numbers in 2022/23, led by the Mid north coast and Central Coast Districts which both recorded increases of over 7%.

Table 20: New South Wales membership numbers by state district

	2018	2019	2020	2021/22	2022/23	% change
Metropolitan	59,218	59,989	65,824	65,361	66,205	1.3%
Regional	83,318	85,924	92,186	93,567	95,209	1.8%
Total member clubs	**142,536**	**145,913**	**158,010**	**158,928**	**161,414**	**1.6%**
Social	-	-	719	1,334	1,105	-17.2%
Total Members	**142,536**	**145,913**	**158,729**	**160,262**	**162,519**	**1.4%**
Men	110,545	113,376	124,245	125,136	126,674	1.2%
Women	27,055	27,094	28,141	28,672	28,848	0.6%
Boys	4,164	4,597	5,395	5,405	5,937	9.8%
Girls	772	846	948	1,049	1,060	1.0%
Total	**142,536**	**145,913**	**158,729**	**160,262**	**162,519**	**1.4%**

Source: Golf Australia



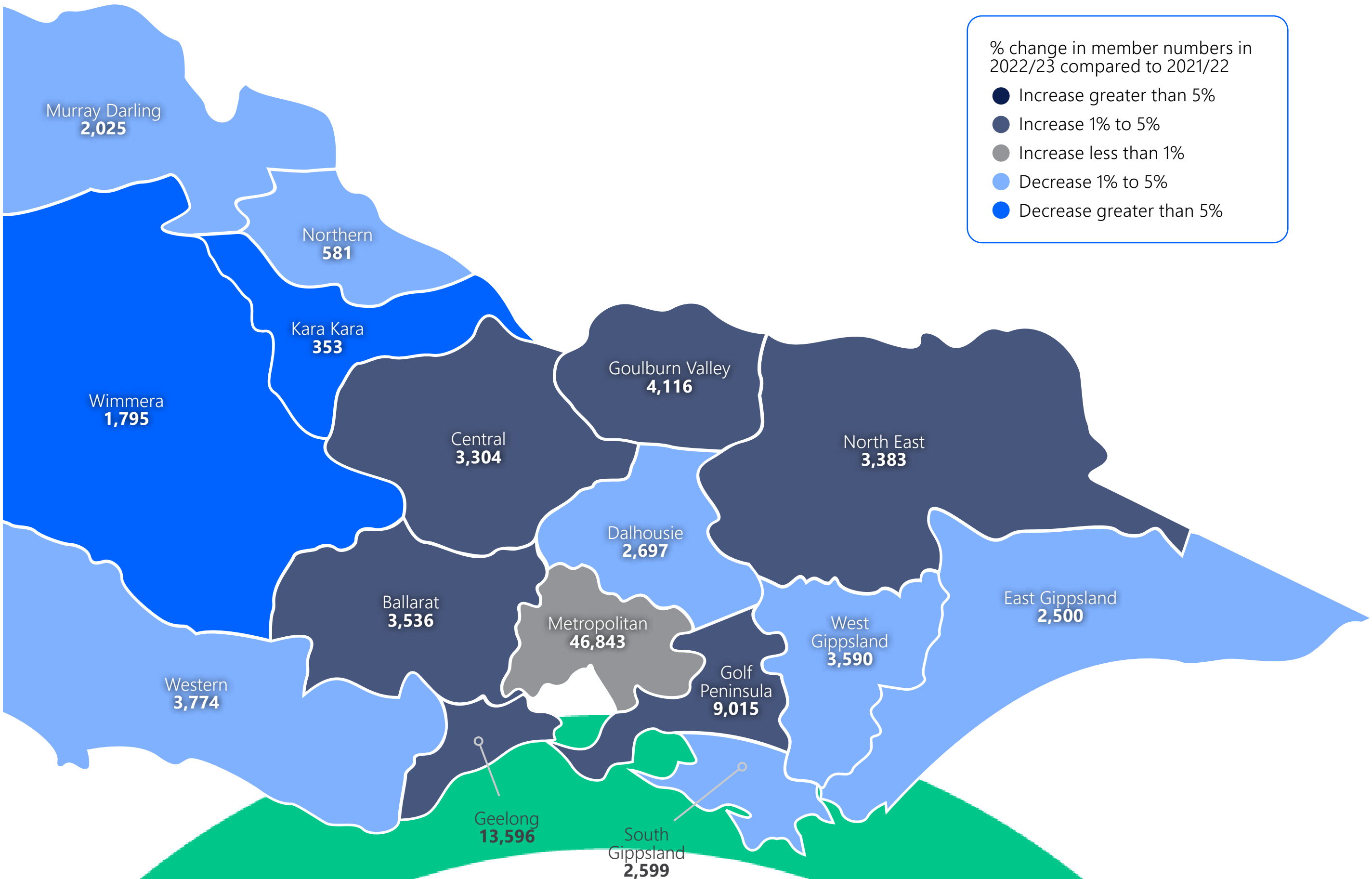
VICTORIA

7 of the 16 districts in Victoria experienced an increase in member numbers in 2022/23, led by the Golf Peninsula and Goulburn Valley regions both recording increases of 5%.

Table 21: Victoria membership numbers by state district

	2018	2019	2020	2021/22	2022/23	% change
Metropolitan	42,940	42,890	45,127	46,460	46,843	0.8%
Regional	51,829	50,676	55,038	56,310	56,864	1.0%
Total member clubs	**94,769**	**93,566**	**100,165**	**102,770**	**103,707**	**0.9%**
Social	8,349	8,359	8,303	8,634	8,647	0.2%
Total Members	**103,118**	**101,925**	**108,468**	**111,404**	**112,354**	**0.9%**
Men	79,389	77,951	83,792	85,652	85,983	0.4%
Women	20,642	20,934	20,577	21,571	21,563	0.0%
Boys	2,620	2,569	3,577	3,593	4,172	16.1%
Girls	467	471	522	588	636	8.2%
Total	**103,118**	**101,925**	**108,468**	**111,404**	**112,354**	**0.9%**

Source: Golf Australia



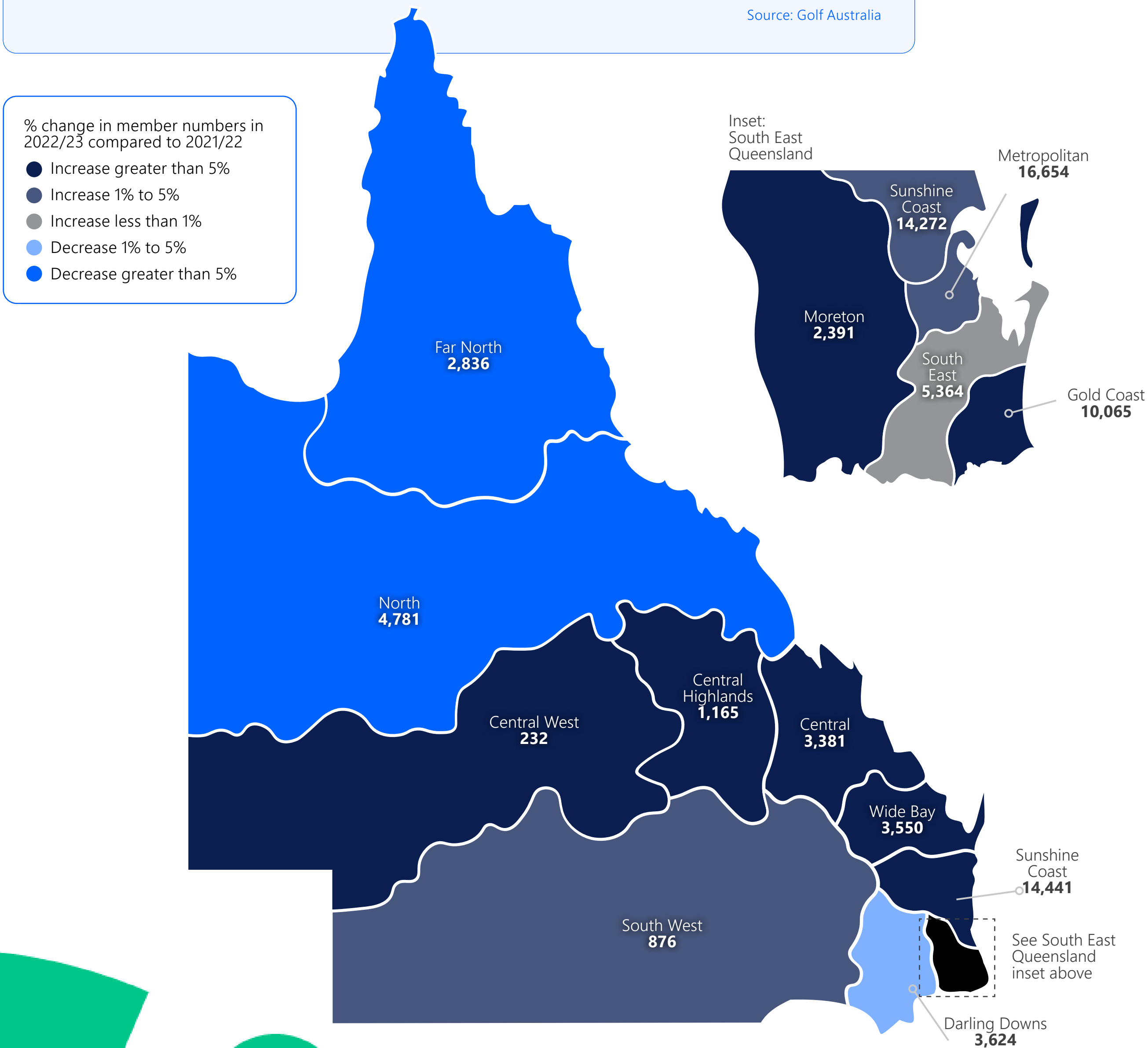
QUEENSLAND

Ten of the 13 districts in Queensland experienced an increase in membership numbers in 2022/23, led by Central Highlands, Wide Bay & Moreton, all recording increases of at least 7%.

Table 22: Queensland membership numbers by state district

	2018	2019	2020	2021/22	2022/23	% change
Metropolitan	14,322	14,383	14,916	16,071	16,654	3.6%
Regional	47,485	47,049	50,424	51,803	52,709	1.7%
Total member clubs	**61,807**	**61,432**	**65,340**	**67,874**	**69,363**	**2.2%**
Social	267	267	267	219	47	-78.5%
Total Members	**62,074**	**61,699**	**65,607**	**68,093**	**69,410**	**1.9%**
Men	47,170	47,815	51,306	53,312	53,985	1.3%
Women	11,737	11,044	11,561	11,931	12,474	4.6%
Boys	2,464	2,206	2,112	2,177	2,205	1.3%
Girls	703	634	628	673	746	10.8%
Total	**62,074**	**61,699**	**65,607**	**68,093**	**69,410**	**1.9%**

Source: Golf Australia



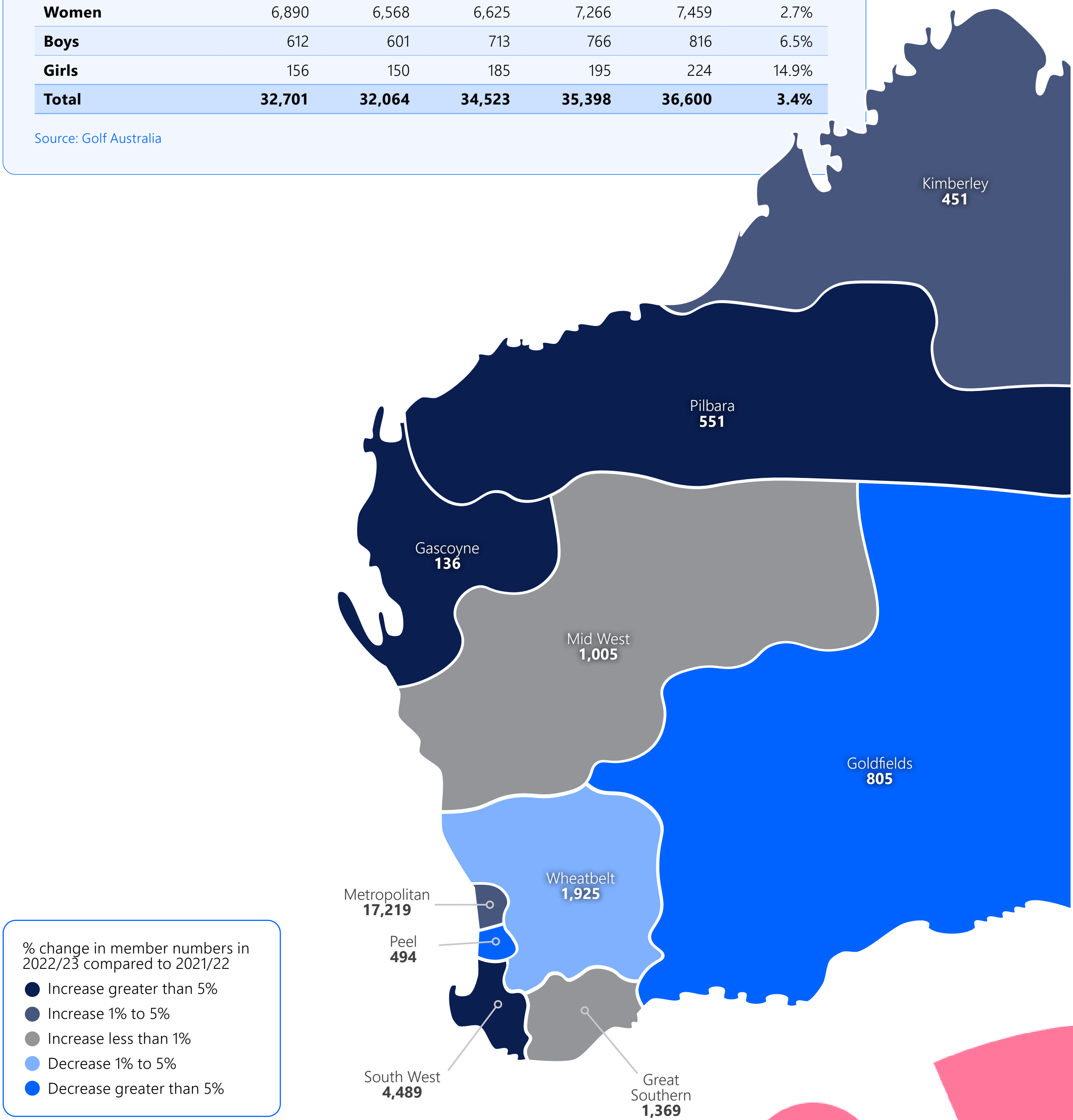
WESTERN AUSTRALIA

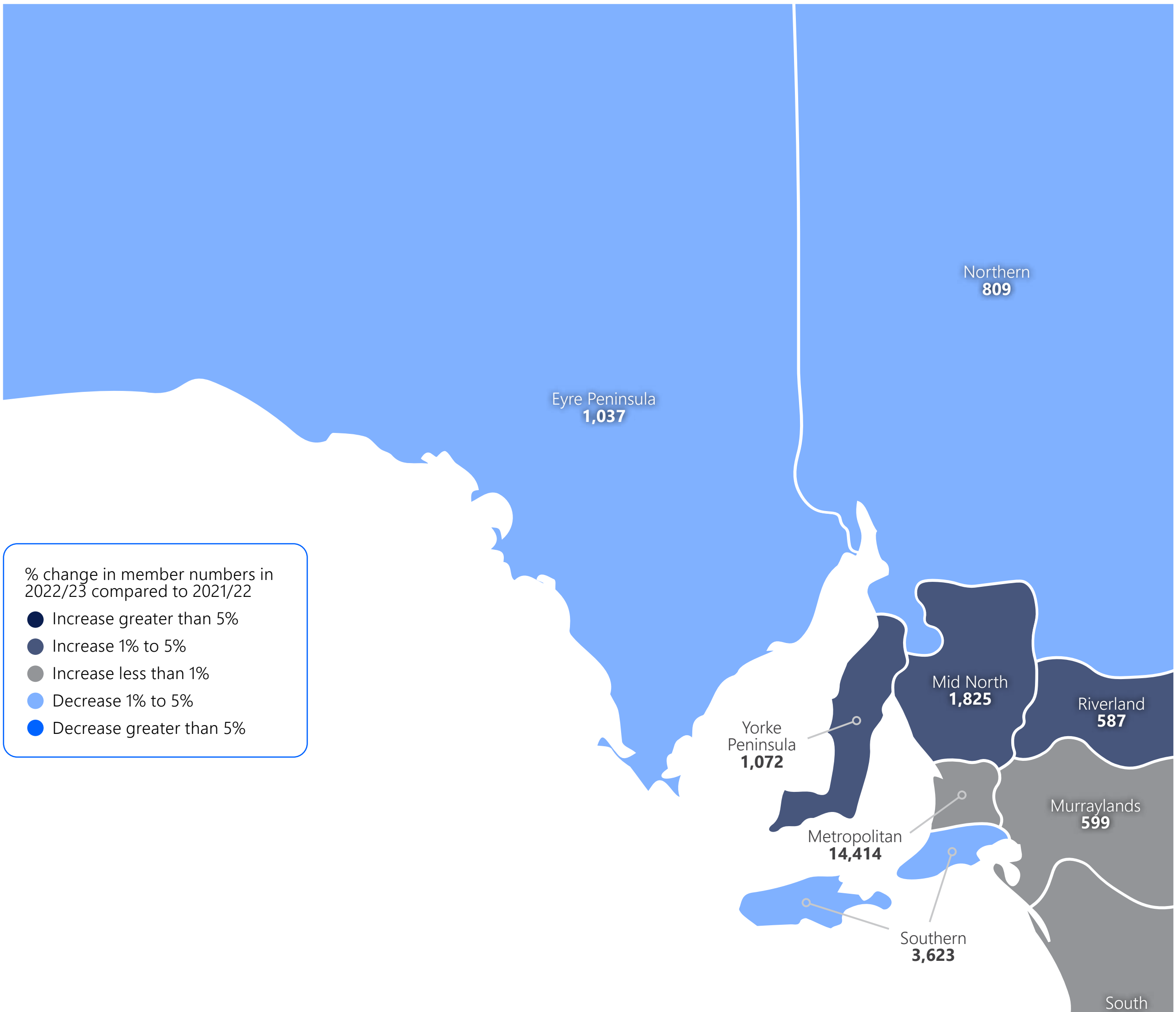
Six of the 10 districts in Western Australia experienced an increase in member numbers in 2022/23, led by the Pilbara and Gascoyne areas both with increases of above 15%.

Table 23: Western Australia membership numbers by state district

	2018	2019	2020	2021/22	2022/23	% change
Metropolitan	15,942	15,263	16,403	16,821	17,219	2.4%
Regional	10,553	10,312	10,938	10,978	11,225	2.2%
Total member clubs	**26,495**	**25,575**	**27,341**	**27,799**	**28,444**	**2.3%**
Social	6,206	6,489	7,182	7,599	8,156	7.3%
Total Members	**32,701**	**32,064**	**34,523**	**35,398**	**36,600**	**3.4%**
Men	25,043	24,745	27,000	27,171	28,101	3.4%
Women	6,890	6,568	6,625	7,266	7,459	2.7%
Boys	612	601	713	766	816	6.5%
Girls	156	150	185	195	224	14.9%
Total	**32,701**	**32,064**	**34,523**	**35,398**	**36,600**	**3.4%**

Source: Golf Australia





SOUTH AUSTRALIA

Five of the 9 districts in South Australia experienced an increase in membership numbers in 2022/23, led by the Mid-North and Riverland Districts both recording increases of 4% and above.

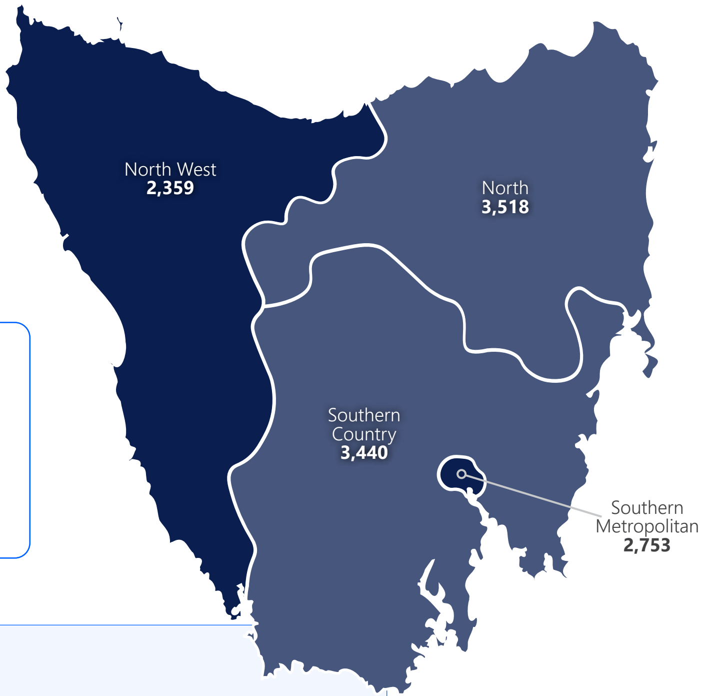
Table 24: South Australia membership numbers by state district

	2018	2019	2020	2021/22	2022/23	% change
Metropolitan	12,731	13,090	13,680	14,343	14,414	0.5%
Regional	10,427	10,009	11,090	11,556	11,641	0.7%
Total member clubs	**23,158**	**23,099**	**24,770**	**25,899**	**26,055**	**0.6%**
Social	4,695	8,129	10,892	12,069	13,808	14.4%
Total Members	**27,853**	**31,228**	**35,662**	**37,968**	**39,863**	**5.0%**
Men	22,166	25,270	29,264	31,180	32,969	5.7%
Women	4,877	5,121	5,265	5,510	5,529	0.3%
Boys	658	693	959	1,075	1,151	7.1%
Girls	152	144	174	203	214	5.4%
Total	**27,853**	**31,228**	**35,662**	**37,968**	**39,863**	**5.0%**

Source: Golf Australia

TASMANIA

All districts in Tasmania recorded increases in 2022/23, led by the North West District which recorded an increase of 9% in its club members.



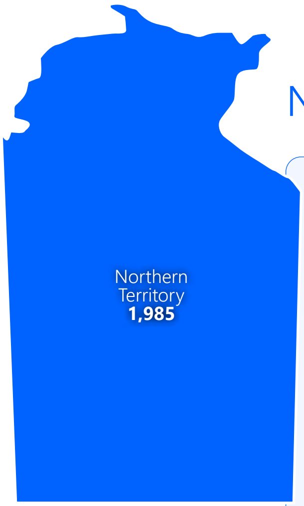
% change in member numbers in 2022/23 compared to 2021/22

- Increase greater than 5%
- Increase 1% to 5%
- Increase less than 1%
- Decrease 1% to 5%
- Decrease greater than 5%

Table 25: Tasmania membership numbers by state district

	2018	2019	2020	2021/22	2022/23	% change
Metropolitan	2,181	2,083	2,169	2,545	2,753	8.2%
Regional	8,028	7,818	8,184	8,945	9,317	4.2%
Total member clubs	**10,209**	**9,901**	**10,353**	**11,490**	**12,070**	**5.0%**
Social	29	58	72	30	24	-20.0%
Total Members	**10,238**	**9,959**	**10,425**	**11,520**	**12,094**	**5.0%**
Men	8,207	8,067	8,491	9,301	9,617	3.4%
Women	1,701	1,619	1,631	1,749	1,938	10.8%
Boys	291	241	269	430	477	10.9%
Girls	39	32	34	40	62	55.0%
Total	**10,238**	**9,959**	**10,425**	**11,520**	**12,094**	**5.0%**

Source: Golf Australia



NORTHERN TERRITORY

Table 26: Northern Territory membership numbers by state district

	2018	2019	2020	2021/22	2022/23	% change
Metropolitan	-	-	-	-	-	0.0%
Regional	2,017	1,825	1,942	2,135	1,985	-7.0%
Total member clubs	**2,017**	**1,825**	**1,942**	**2,135**	**1,985**	**-7.0%**
Social	-	-	-	-	-	0.0%
Total Members	**2,017**	**1,825**	**1,942**	**2,135**	**1,985**	**-7.0%**
Men	1,610	1,463	1,561	1,726	1,591	-7.8%
Women	332	302	317	343	329	-4.2%
Boys	50	44	48	51	49	-3.9%
Girls	25	16	16	15	16	6.7%
Total	**2,017**	**1,825**	**1,942**	**2,135**	**1,985**	**-7.0%**

Source: Golf Australia

08
Competition Rounds

TOTAL COMPETITION ROUNDS

Reflecting the improving levels of member demand post the COVID-19 pandemic, total competition rounds played in 2022/23 increased by 5.6% over 2021/22. Over 90% of the national increase can be attributed to increased rounds outcomes in Victoria (61%) and Queensland (32%).

AVERAGE COMPETITION ROUNDS PER MEMBER

(The following analysis includes members from Member Clubs only.)

Whilst noting the increase in playing members in 2022/23, average annual rounds played on a per member basis (those playing one round or more) increased moderately to 29.0 rounds per year, up from 27.7 from the prior year. The largest average rounds increases were recorded in Victoria (12%) and Queensland (8%).

AVERAGE COMPETITION ROUNDS PER MEMBER BY AGE

Average competition rounds played vary significantly when measured by age cohort. Figure 17 below illustrates the trend for 2022/23, with average round frequencies peaking for members aged older than 65 years at over 35 rounds per member annually.

By contrast, younger members have a significantly lower round frequency, with most cohorts under the age of 45 playing an average of less than 20 rounds per member.

Table 27: Total competition rounds

State	2022/23	% change
NSW	4,160,832	1.7%
VIC	2,833,312	15.1%
QLD	2,089,556	10.3%
WA	1,101,439	-0.3%
SA	839,768	-3.1%
TAS	305,110	-0.6%
NT	48,387	-1.2%
Total	**11,378,404**	**5.6%**

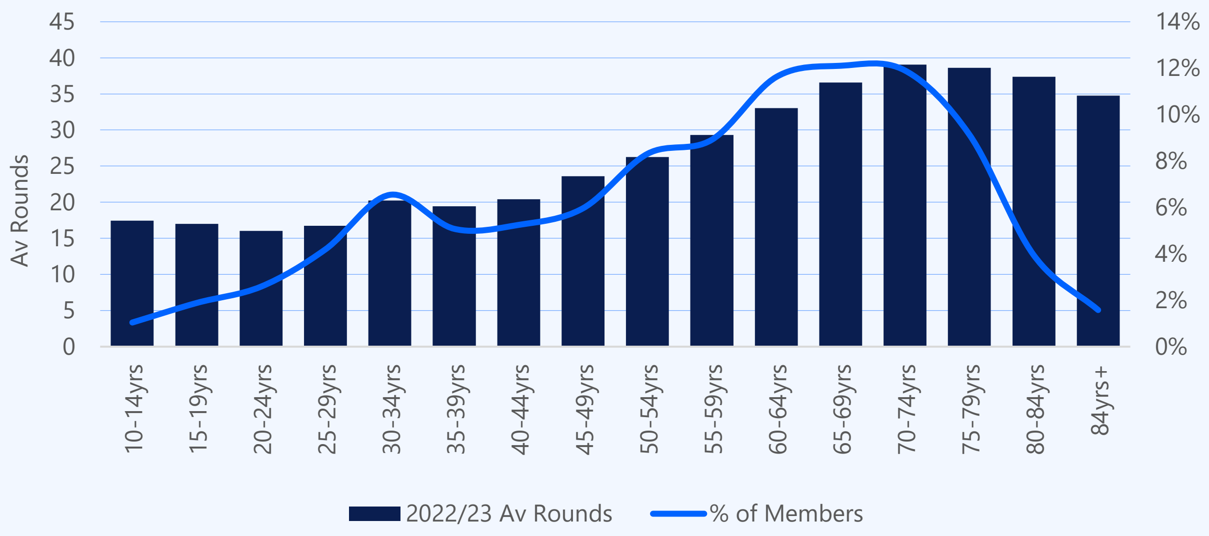
Source: GOLF Link, Golf Australia

Table 28: Average competition rounds per member

State	2022/23	% change
NSW	28.8	2%
VIC	27.5	12%
QLD	29.8	8%
WA	33.2	1%
SA	29.4	-3%
TAS	27.6	-2%
NT	23.4	-2%
Total	**29.0**	**5%**

Source: GOLF Link, Golf Australia

Chart 12: Average competition rounds by age cohort



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