

2016

Golf Club Participation Report

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01 KEY FINDINGS



Golf Australia is pleased to present to you the 2016 Golf Club Participation Report.

The key findings from 2016 are outlined below:

Club Information

- The average club size in Australia is 237 members, with metropolitan clubs on average having more than three times the number of members as regional clubs.
- Two-thirds of clubs in Australia have less than 250 members, with 80% having less than 500 members.
- While clubs of over 1,000 members account for 6% of all clubs across Australia, they account for 30% of individual members.
- There are 313 social clubs affiliated to various state bodies, accounting for 19% of total clubs.
- NSW has the most number of golf course-based clubs with 375, and the highest average member count with 390.
- Western Australia has the highest number of social clubs with 118, and the lowest average member count at golf course-based clubs with 144.
- There are currently 1,347 golf course-based clubs in Australia. There has been a steady decline in clubs over the past 5-year period, from a high of 1,378 in 2012.

Member Movement

- National membership numbers across Australia were reported as 393,975. This result marked a 0.8% decline on numbers reported for the prior 12-month period, equating to a nett loss of 3,132 members.
- History shows that club membership numbers peaked in Australia in 1998 at approximately 500,000 golfers. Since this time, a steady decline has materialised with an overall decline of 27%, averaging 1.2% per annum.
- In the past five-year period a cumulative loss in member numbers of 3% has materialized, which equates to an average decline of 0.6% per year.
- The movement for metropolitan clubs in 2016 was a decline of 1.1%, with an average annual decline of 0.9% evident over the past five years.

- The movement for regional clubs in 2016 was a 1.1% decline, with an average annual decline of 1.1% evident over the past five years.
- Reported member numbers for social clubs have increased over the past five-years from 14,612 in 2012 to 21,558 in 2016, representing an average annual increase of 8.1%.
- Male members declined by 0.2% in the 2016 year, with declines of 0.6% applicable to both metropolitan and regional clubs.
- Female members declined by 3% in 2016, which continues a steady decline over the past five years.
- Given the faster decline in female members relative to males, females now account for just under 20% of national members – down from just under 21% in 2012.
- 36% of clubs experienced a nett increase of more than 2% of members, while 47% experienced a nett decrease of more than 2%.

Age Information

- The average age of club members across the country is just under 56 years, with the average age of male members is eight years younger than females.
- 57% of the national club golf membership base is aged 55 years or greater.
- Reported junior members (under the age of 18) account for 3.5% of total members across the country. This proportion is higher for males than females, with 3.7% of male members being juniors while 2.7% of female members are juniors.

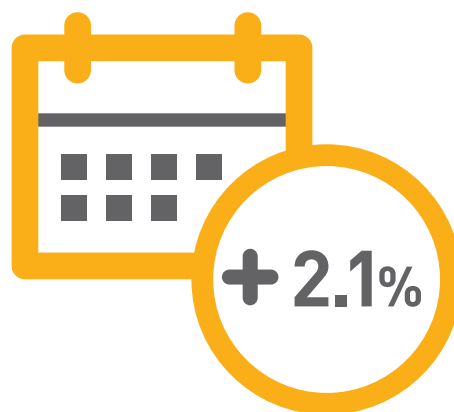
Member Churn

- The national attraction rate is 7.7%, and the attrition rate of 8.7%.
- 50% of new members are under the age of 45 compared to 27% for golf club members generally, indicating a lower age profile for new members.



The key findings for competition rounds played in 2016 are outlined below:

- In 2016 approximately 14.85 million rounds were recorded by GolfLink across the same facility base, a 2.1% increase over the same twelve month period in the prior year.
- Queensland experienced the largest increase in rounds played for the year, recording 5% growth over 2015, largely due to strong outcomes at the beginning and end of the year.
- Slightly softer results were recorded in the metropolitan markets than those recorded nationally with the collective capital cities enjoying only 1.2% growth over 2015. Standout markets were Brisbane and Sydney, with 6.8% and 3.4% rounds growth respectively recorded for these markets.



In 2016 approximately 14.85 million rounds were recorded by GolfLink across the same number of facilities, a 2.1% increase over the previous year.

02 2016 GROWTH INITIATIVES

National Participation Growth Initiatives

A number of national programs and initiatives continue to be developed and implemented by Golf Australia in collaboration with the industry in order to grow participation which include:



MyGolf

Junior program targeted to girls and boys aged 5 to 12 years that is delivered at golf facilities and schools. Administered by GA and the PGA of Australia under a joint venture, and with the support of the Australian Sports Commission, the goal of the program is to increase participation and engagement in golf by children.



Swing Fit

Innovative female introductory program with a primary target age of 18-39 years that provides health, social and basic skill development benefits.



Clubs & Facilities Support

Whole of sport initiative that provides clubs and facilities with human resources, tools and information to assist their capability, financial performance and sustainability.



Golf Month

National campaign held in October to increase membership and participation with facilities conducting a variety of activities to encourage new, returning and current golfers to play more golf.



Qantas Golf Club

Program developed by Qantas Loyalty in partnership with GA to increase participation through offering high quality events, tee times and an official GA handicap.

Community
Instructor



Community Instructor

Program designed to grow the game through the effective development of a volunteer workforce at grassroots level as a result of the ongoing collaboration between GA and the PGA of Australia.



Inclusion

Joint initiative between GA, Golf Victoria and the PGA of Australia with the initial focus of providing increased opportunities for people with a disability to participate in golf.

03 REPORT BACKGROUND



Introduction

Golf Australia is pleased to present to you the **2016 National Club Participation Report**. It continues to be the goal of Golf Australia to provide the wider golf industry with timely participation information that enables the sport to understand the current landscape and trends in golf participation. Now in its 4th year in this format, it is hoped that this report is becoming an increasingly valuable reference as clubs seek to develop evidenced based strategies that will enhance the future growth and overall sustainability of the game.



About the Author

Seeking independence of data analysis and subsequent interpretation with this project, Golf Australia sought the expertise of **Golf Business Advisory Services (GBAS)** to draft this report. GBAS has authored the past three participation reports for Golf Australia, along with a number of other leading industry reference reports covering such topics as club operational and salary benchmarking, membership attrition and retention, national rounds played, and golf retail operations. For more information on GBAS please visit www.golfbas.com



04 NATIONAL CLUB MEMBERSHIP OVERVIEW

Member Golf Association Reporting

Club golfer numbers are reported annually each year by the seven respective state and territory member golf association (MGA) bodies. The reported numbers reflect those 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.' The respective reporting periods and the respective membership timing they represent are summarised in the table below:

State	MGA Annual Report	Data Collected	Period
NSW/ACT *	2015/16	May 2016	Most recent completed financial year
VIC	Calendar Year 2016	December 2016	Most recent completed financial year
QLD	Calendar Year 2015	December 2015	Most recent completed financial year
SA	2015/16	December 2016	Point in time
WA	2015/16	December 2016	Point in time
TAS	Calendar Year 2016	June 2016	Point in time
NT	2015/16	December 2015	Point in time

Note: Throughout this report, New South Wales will refer to data from both New South Wales and the Australian Capital Territory.



As outlined above, different collection and reporting periods exist within the MGA's. As a result, the reported numbers are not for the same comparable 12-month period. The MGA reports however remain the most accurate data sources available, with data provided by individual club by gender for 76 national regions and 1,660 clubs. As in the past three participation reports, in order for annual trends to be determined, the most recently published (or to be published) numbers have been aggregated and classified as year ending 2016 numbers.



04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Profile of Australian Clubs

The current size profile of Australian golf clubs, based on the 1,660 clubs that reported playing membership numbers for 2016, is outlined by general geographic location and club size in Table 1.

Table 1

Club Membership Size	Metropolitan	Regional	Social	Total	% Clubs	% Members
Less than 250	27	868	299	1,194	66%	18%
250 to 499	42	140	11	193	14%	17%
500 to 749	46	81	2	129	9%	20%
750 to 999	42	28	1	71	5%	15%
1,000 to 1,249	27	14	0	41	3%	11%
1,250 +	24	8	0	32	3%	19%
Total	208	1,139	313	1,660	100%	100%
% of Clubs	12%	69%	19%	100%		
Average Size	732	193	69	237		

Source: Golf Australia Database

Key observations noted from the size profile data outlined above include:

- The average club size in Australia is 237 members, with metropolitan clubs on average having more than three times the number of members as regional clubs.
- Two-thirds of clubs in Australia have less than 250 members, with 80% having less than 500 members.
- 69% of all clubs in Australia are located in a regional area.
- While clubs of over 1,000 members account for 6% of all clubs across Australia, they account for 30% of individual members.
- There are 313 social clubs affiliated to various state bodies, accounting for 19% of total clubs. These clubs either typically have semi-permanent access rights to a public golf course (eg. Victoria Golf League) or are a club that utilise GolfLink for handicapping purposes in the events they deliver to their members.



04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Profile of Australian Clubs (cont)

The current size profile by state/territory for 2016 is outlined in Table 2.

Table 2

Club Membership Size	NSW	VIC	QLD	WA	SA	TAS	NT	Total
Social Clubs	0	117	1	118	76	1	0	313
Course-Based Clubs								
Less than 250	192	210	152	158	122	53	8	895
250 to 499	59	52	37	11	11	10	2	182
500 to 749	60	29	19	11	5	2	1	127
750 to 999	33	15	12	6	3	1	0	70
1,000 to 1,249	20	13	5	0	3	0	0	41
1,250 +	11	10	6	3	2	0	0	32
Total Course-Based Clubs	375	329	231	189	146	66	11	1,347
Avg Course-Based Club Size	390	301	274	145	163	161	197	

Source: Golf Australia Database

Key observations noted from the size profile data outlined above include:

- NSW has the most number of golf course-based clubs with 375, and the highest average member count with 390.
- Western Australia has the highest number of social clubs with 118, and the lowest average member count at golf course-based clubs with 144.



Course-Based Clubs

As depicted in Table 2, there are currently 1,347 golf course-based clubs in Australia. There has been a steady decline in clubs over the past 5-year period, from a high of 1,378 in 2012.

Table 3

State	2012	2013	2014	2015	2016	% change
NSW	389	383	378	378	375	-3.6%
VIC	337	336	332	333	329	-2.4%
QLD	233	234	234	234	231	-0.9%
WA	191	195	195	190	189	-1.0%
SA	149	146	146	146	146	-2.0%
TAS	68	68	68	62	66	-2.9%
NT	11	11	11	11	11	0.0%
Total	1,378	1,373	1,364	1,354	1,347	-2.2%

Source: Golf Australia Database

04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Club Playing Members

2016 National Total

For the 2016 period, national membership numbers across Australia were reported as 393,975. This result marked a 0.8% decline on numbers reported for the prior 12-month period, equating to a loss of 3,132 individual members.

Only Victoria and South Australia experienced a nett gain in membership numbers for the period, while the decline in New South Wales was the most significant at nearly 2,850 members, equating to a 1.9% decline.

Table 4 summarises the national results recorded for 2016.



Table 4

State	2016	2015	Change	% Change
NSW	146,174	149,023	-2,849	-1.9%
VIC	111,485	110,519	966	0.9%
QLD	63,754	65,262	-1,508	-2.4%
WA	32,977	33,439	-462	-1.4%
SA	26,734	25,822	912	3.4%
TAS	10,679	10,729	-50	-0.5%
NT	2,172	2,313	-141	-6.5%
Overall	393,975	397,107	-3,132	-0.8%

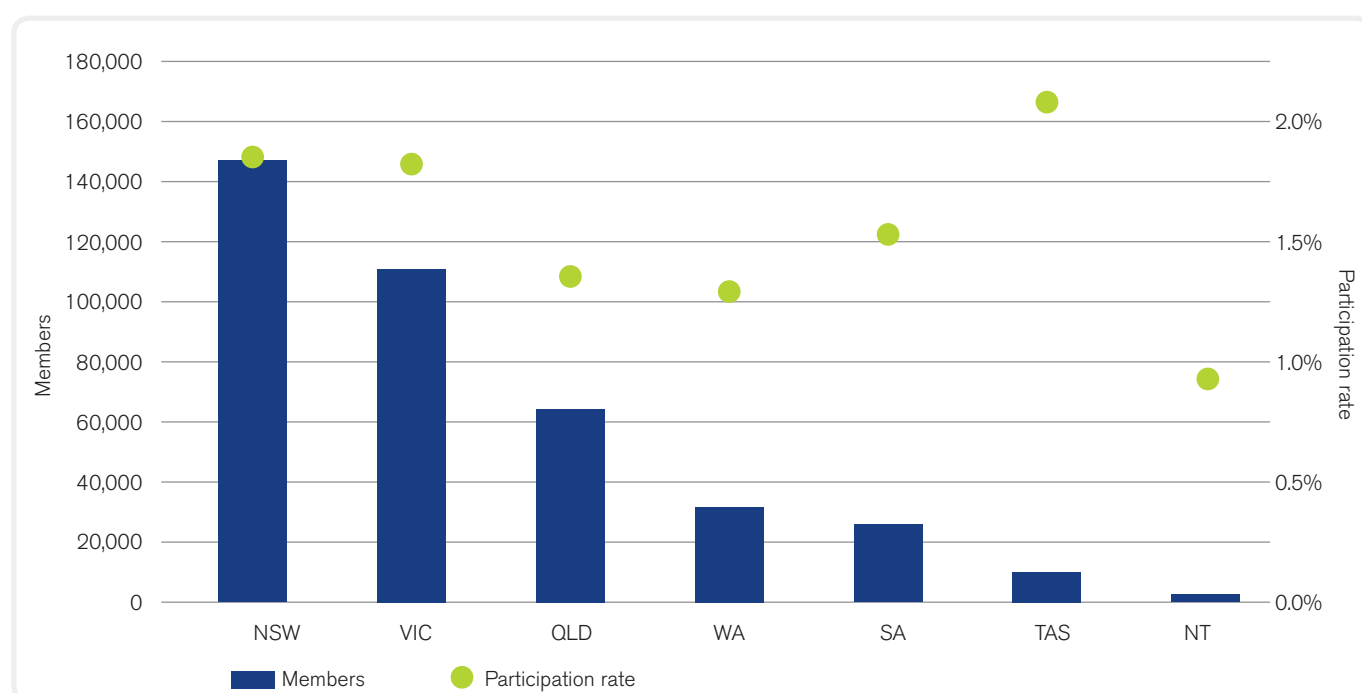
Source: Golf Australia Database

Note: comparative numbers from 2015 Golf Club Participation Report have been reset for Tasmania, and therefore do not match those reported in the 2015 report.

Participation Rate

The chart below shows the participation of registered club members (including social club members) as a percentage of each state/territory's total population. The overall participation rate across Australia is 1.7%, while participation rates above the national average are recorded in New South Wales, Victoria and Tasmania.

Chart 1 – Participation Rate by State/Territory



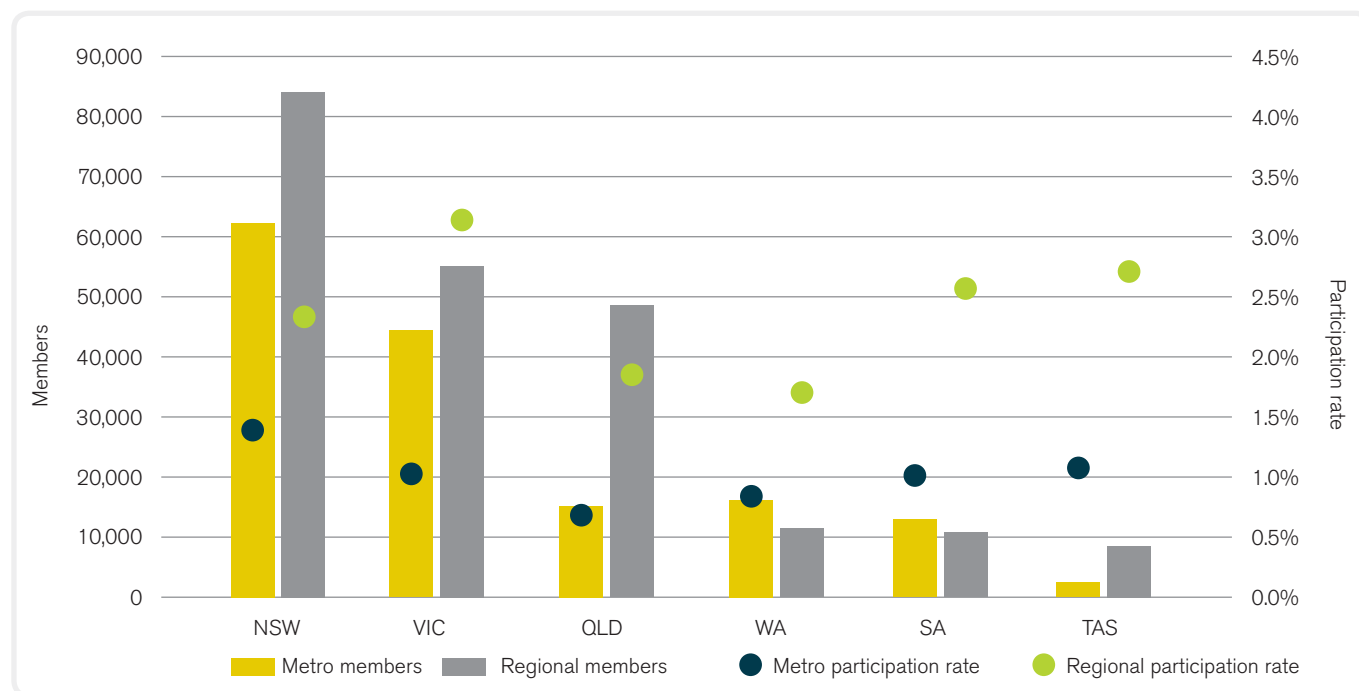
Source: ABS, Golf Australia database

04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Participation Rate (cont)

The chart below depicts the participation of registered golfers (excluding social club members) as a percentage of each region's total population. Across the nation, the participation rate for metropolitan areas is 1%, which is materially lower than the 2.3% applicable to regional areas. These results by state/territory is depicted in Chart 2 below.

Chart 2 – Participation Rate by Region



Source: ABS, Golf Australia database



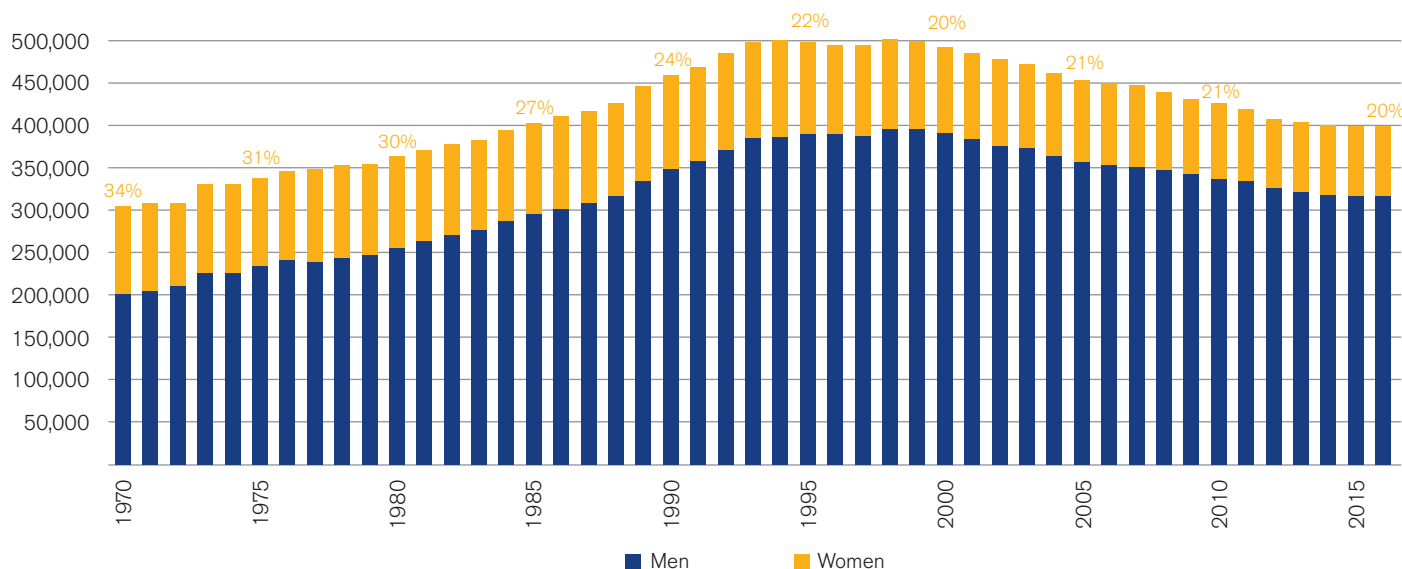
04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Historical Trends

History shows that club membership numbers peaked in Australia in 1998 at approximately 500,000 golfers. Since that time a steady decline has materialised, with an overall decline of 27% averaging 1.2% per annum. There has also been a decline in the proportion of female members, from a high of 34% in 1970 down to the current level at 20%.

The long-term membership picture for male and female members is illustrated in Chart 1.

Chart 3 - Historical Member Numbers & Female Percentage



In the past five-year period a cumulative loss in total members of 3% has materialized, which equates to an average decline of 0.6% per year. Victoria, Western Australia and South Australia have each experienced a nett increase in member numbers over this period, while material declines are evident in New South Wales, Queensland and Tasmania.

Table 5 summarises the national results recorded for the five-year period 2012 to 2016.

Table 5

State	2012	2013	2014	2015	2016	% Change	
						1 Year	5 Year
NSW	156,976	153,594	149,855	149,023	146,174	-1.9%	-1.4%
VIC	110,268	111,907	111,026	110,519	111,485	0.9%	0.2%
QLD	67,714	65,781	65,282	65,262	63,754	-2.3%	-1.2%
WA	31,409	32,837	33,627	33,439	32,977	-1.4%	1.0%
SA	26,211	25,683	25,909	25,822	26,734	3.5%	0.4%
TAS	11,847	11,310	11,131	10,729	10,679	-0.5%	-2.1%
NT	2,293	2,276	2,216	2,313	2,172	-6.1%	-1.1%
Metropolitan	158,827	157,203	154,466	153,794	152,172	-1.1%	-0.9%
Regional	233,279	228,421	225,404	222,583	220,245	-1.1%	-1.1%
Social	14,612	17,764	19,176	20,730	21,558	4.0%	8.1%
Overall	406,718	403,388	399,046	397,107	393,975	-0.8%	-0.6%
# Course-Based Clubs	1,378	1,373	1,364	1,354	1,347	-0.5%	-0.5%

Source: Golf Australia Database

Note: Total course-based clubs does not include social clubs that operate within a public golf course.

04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Club Playing Members (cont)

Results by Geographical Area - Metropolitan

The movement for metropolitan clubs in 2016 was a decline of 1.1%, with an average annual decline of 0.9% evident over the past five years. Victoria was the only state with positive movement over this five-year period, while New South Wales and Queensland had the largest declines at an annual rate of 1.3% and 1.8% respectively.

The results for each state/territory for metropolitan areas are represented in Table 6.

Table 6

State	2012	2013	2014	2015	2016	% Change	
						1 Year	5 Year
NSW	66,309	65,587	63,515	63,251	62,072	-1.9%	-1.3%
VIC	44,042	44,176	43,782	44,265	44,201	-0.1%	0.1%
QLD	16,121	15,715	15,113	14,653	14,737	0.6%	-1.8%
WA	16,443	16,317	16,730	16,457	16,054	-2.4%	-0.5%
SA	13,553	13,238	13,153	12,990	12,902	-0.7%	-1.0%
TAS	2,359	2,170	2,173	2,178	2,206	1.3%	-1.3%
Overall	158,827	157,203	154,466	153,794	152,172	-1.1%	-0.9%

Source: Golf Australia Database

Note: This table excludes social clubs.

Results by Geographical Area - Regional

The movement for regional clubs in 2016 was a 1.1% decline, with an average annual decline of 1.1% evident over the past five years. All states/territories experienced a decline in regional member numbers, with the largest average decline evident in New South Wales and Tasmania at 1.5% and 2.3% respectively.

The results for each state/territory for regional areas are represented in Table 7.

Table 7

State	2012	2013	2014	2015	2016	% Change	
						1 Year	5 Year
NSW	90,667	88,007	86,340	85,772	84,102	-1.9%	-1.5%
VIC	56,226	56,321	55,089	53,359	54,694	2.5%	-0.6%
QLD	51,593	50,036	50,016	50,184	48,646	-3.1%	-1.2%
WA	11,650	11,680	11,737	11,355	11,355	0.0%	-0.5%
SA	11,362	10,961	11,071	11,073	10,827	-2.2%	-1.0%
TAS	9,488	9,140	8,935	8,527	8,449	-0.9%	-2.3%
NT	2,293	2,276	2,216	2,313	2,172	-6.1%	-1.1%
Overall	233,279	228,421	225,404	222,583	220,245	-1.1%	-1.1%

Source: Golf Australia Database

Note: This table excludes social clubs.

04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Club Playing Members (cont)

Social Club Members

Reported member numbers for social clubs have increased over the past five-years from 14,612 in 2012 to 21,558 in 2016, representing an average annual increase of 8.1%. The results for each state/territory are represented in Table 8.

Table 8

State	2012	2013	2014	2015	2016	% Change	
						1 Year	5 Year
VIC	10,000	11,410	12,155	12,895	12,590	-2.4%	4.7%
QLD	0	30	153	425	371	-12.7%	
WA	3,316	4,840	5,160	5,627	5,568	-1.0%	10.9%
SA	1,296	1,484	1,685	1,759	3,005	70.8%	18.3%
TAS	0	0	23	24	24	0.0%	
Overall	14,612	17,764	19,176	20,730	21,558	4.0%	8.1%

Source: Golf Australia Database

Note: There are no affiliated social clubs in New South Wales or the Northern Territory.

Membership by Gender - Male

Male members declined by 0.2% in the 2016 year, with declines of 0.6% applicable to metropolitan and regional clubs. These results were offset by an increase in social club members. There was some variance evident in the results by state/territory, with Victoria, Western Australia and South Australia experiencing an increase in male member numbers over the five-year period.

These results are summarized in Table 9.

Table 9

State	2012	2013	2014	2015	2016	% Change	
						1 Year	5 Year
NSW	124,842	122,727	119,669	119,476	117,747	-1.4%	-1.2%
VIC	85,850	87,109	86,778	86,539	88,409	2.2%	0.6%
QLD	53,846	53,145	52,473	52,481	51,219	-2.4%	-1.0%
WA	24,518	25,701	26,319	26,309	25,890	-1.6%	1.1%
SA	20,981	20,577	20,816	20,726	21,636	4.4%	0.6%
TAS	9,706	9,280	9,153	8,865	8,902	0.4%	-1.7%
NT	1,908	1,897	1,850	1,910	1,810	-5.2%	-1.0%
Metropolitan	128,191	126,696	124,779	124,110	123,337	-0.6%	-0.8%
Regional	182,281	179,739	177,008	175,429	174,452	-0.6%	-0.9%
Social	11,179	14,001	15,271	16,767	17,824	6.3%	9.8%
Overall	321,651	320,436	317,058	316,306	315,613	-0.2%	-0.4%

Source: Golf Australia database

04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Club Playing Members (cont)

Membership by Gender - Female

Female members declined by 3% in 2016, which continues a steady decline over the past five years. A 3.8% decline was apparent in both New South Wales and Victoria in 2016. Over the past five years, an average annual decline of 1.2% and 2.1% is evident for metropolitan and regional clubs respectively.

These results are summarized in Table 10.

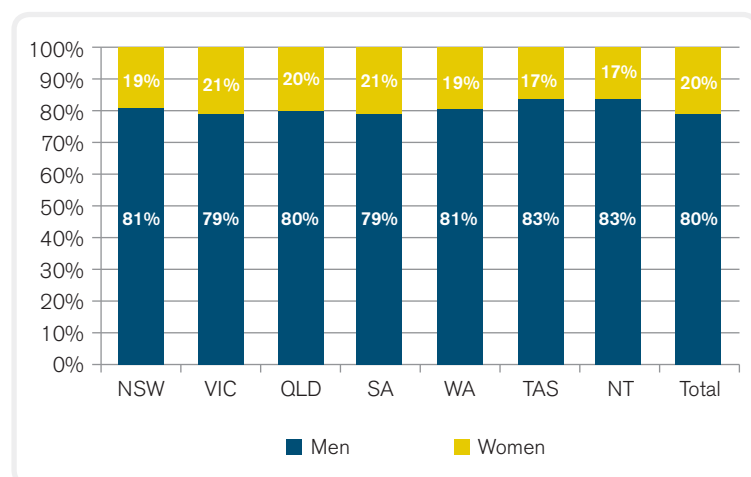
Table 10

State	2012	2013	2014	2015	2016	% Change	
						1 Year	5 Year
NSW	32,134	30,867	30,186	29,547	28,427	-3.8%	-2.4%
VIC	24,418	24,798	24,248	23,980	23,076	-3.8%	-1.1%
QLD	13,868	12,636	12,809	12,781	12,535	-1.9%	-2.0%
WA	6,891	7,136	7,308	7,130	7,087	-0.6%	0.6%
SA	5,230	5,106	5,093	5,096	5,098	0.0%	-0.5%
TAS	2,141	2,030	1,978	1,864	1,777	-4.7%	-3.7%
NT	385	379	366	403	362	-10.2%	-1.2%
Metropolitan	30,636	30,507	29,687	29,684	28,835	-2.9%	-1.2%
Regional	50,998	48,682	48,396	47,154	45,793	-2.9%	-2.1%
Social	3,433	3,763	3,905	3,963	3,734	-5.8%	1.7%
Overall	85,067	82,952	81,988	80,801	78,362	-3.0%	-1.6%
% of total	20.9%	20.6%	20.5%	20.3%	19.9%		

Given the faster decline in female members relative to males, females now account for just under 20% of national members – down from just under 21% in 2012.

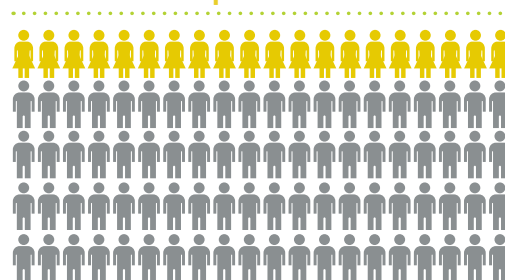
The gender mix evident by state for the 2016 year, as summarised in Chart 4, shows some variation between states/territories. Victoria and Western Australia have the highest percentage of female members at 21% while the lowest is in the Northern Territory and Tasmania at 17%.

Chart 4 - Gender Breakdown by State/Territory



Source: Golf Australia Database

20%
female share of
membership base



04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Level of Membership Movement

In 2016, 36% of clubs (34% in 2015) experienced a nett increase of more than 2% in membership numbers, while 47% experienced a nett decrease (44% in 2015). Table 11 summarizes the proportion of clubs experiencing positive and negative shifts in their membership base for each size category.

Club Size	Increase		Flat	Decrease	
	5%	2-5%	<2% variance	2-5%	>5%
Less than 250	31%	5%	17%	8%	40%
250 to 499	31%	9%	19%	9%	32%
500 to 749	24%	9%	17%	20%	29%
750 to 999	26%	16%	23%	16%	20%
1,000 to 1,249	29%	12%	37%	15%	7%
1,250 +	16%	8%	32%	30%	14%
Overall	29%	7%	18%	11%	35%
	36%			46%	

Source: Golf Australia Database

Note: 18 clubs reported no numbers in 2016 and are therefore assumed to have closed. These clubs are excluded from this table

Member Age Profile

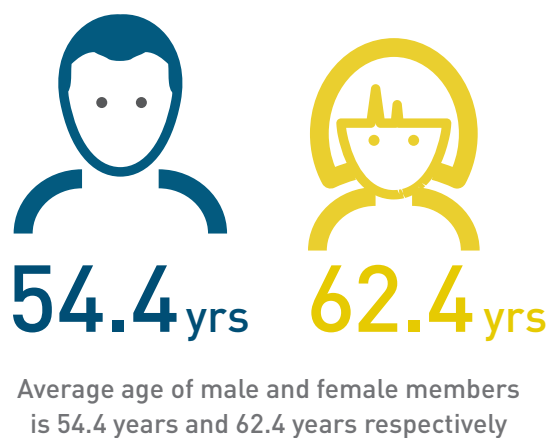
Average Age

The average age of club members across the country is just under 56 years. In terms of gender, the average age of male members is eight years younger than females, with a similar age disparity being evident across all states/territories.

Full results of the age breakdown for male and female club members by state are depicted in Table 12.

Table 12

State	Male	Female	Overall
NSW	55.0	63.4	56.5
VIC	54.2	63.0	55.9
QLD	54.4	61.8	55.7
WA	53.4	59.0	54.5
SA	54.1	62.3	55.5
TAS	54.1	62.9	55.5
NT	48.6	55.6	49.6
Overall	54.4	62.4	55.9



Source: GolfLink

04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Member Age Profile (cont)

Age Distribution

57% of the national club golf membership base is aged 55 years or greater. The relative breakdown of club members by age bracket for each state/territory is depicted in Table 13.

Table 13

Age group	NSW	VIC	QLD	WA	SA	TAS	NT	Overall
Under 18	3.9%	3.4%	3.3%	2.8%	2.9%	3.1%	3.9%	3.5%
18-34	11.7%	11.9%	13.0%	13.4%	12.6%	12.7%	17.9%	12.2%
35-44	11.2%	11.5%	11.7%	10.4%	11.7%	10.3%	15.9%	11.3%
45-54	15.4%	15.9%	15.9%	16.6%	14.9%	15.3%	20.8%	15.6%
55-64	21.4%	21.0%	20.1%	22.6%	20.2%	22.8%	24.0%	21.0%
65-74	23.4%	22.5%	23.0%	22.6%	25.2%	24.9%	13.8%	23.1%
75+	13.1%	13.9%	13.0%	11.6%	12.5%	10.9%	3.7%	12.9%

Source: GolfLink



04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Member Age Profile (cont)

Junior Members

Reported junior members (under the age of 18) account for 3.5% of total members across the country. This proportion is higher for males than females, with 3.7% of male members being juniors while 2.7% of female members are juniors.

There is some variation across different states. New South Wales reported the highest proportion of junior members at 3.9% while Western Australia reported the lowest proportion at 2.8%.

A summary of junior membership number is found in Table 14.

State	Male Junior		Female Junior		Total Juniors	
	2016	% of Male	2016	% of Female	2016	% of Total
NSW	4,919	4.2%	735	2.6%	5,654	3.9%
VIC	3,297	3.7%	507	2.2%	3,804	3.4%
QLD	1,614	3.2%	511	4.1%	2,125	3.3%
WA	748	2.9%	164	2.3%	912	2.8%
SA	674	3.1%	112	2.2%	786	2.9%
TAS	293	3.3%	35	2.0%	328	3.1%
NT	59	3.3%	25	6.9%	84	3.9%
Overall	11,604	3.7%	2,089	2.7%	13,693	3.5%

Source: GolfLink



04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Attraction & Attrition Rates

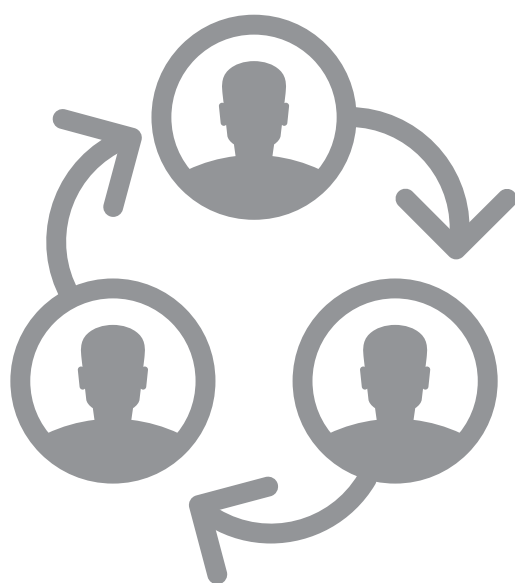
Utilising data from GolfLink, Golf Australia is able to report annual national club (excluding social clubs) attraction & attrition rates. With new member data (defined as being those golf club members that were allocated a new GolfLink number during the year) sourced from GolfLink merged with year-end member numbers, these rates can be accurately calculated.

Table 15 depicts the relevant attraction and attrition rates for metropolitan and regional clubs, as well as the overall result. This data shows a national attraction rate of 7.7%, and an attrition rate of 8.7%. There is some variation in these rates based on region, with higher rates generally applicable to regional clubs than metropolitan clubs.

Table 15

	Metropolitan		Regional		Total	
State	Attraction	Attrition	Attraction	Attrition	Attraction	Attrition
NSW	6.4%	7.7%	7.1%	8.8%	6.8%	8.3%
VIC	6.0%	6.1%	8.4%	6.3%	7.3%	6.2%
QLD	7.9%	7.3%	10.5%	13.2%	9.9%	11.8%
WA	7.7%	10.1%	10.2%	10.9%	8.7%	10.4%
SA	7.1%	7.7%	8.6%	11.6%	7.8%	9.5%
TAS	9.8%	8.5%	7.8%	8.7%	8.2%	8.6%
NT	-	-	12.9%	19.0%	12.9%	19.0%
Overall	6.7%	7.5%	8.5%	9.5%	7.7%	8.7%

Source: Golf Australia database, GolfLink



2016 results
show a national
attrition rate of

8.7%

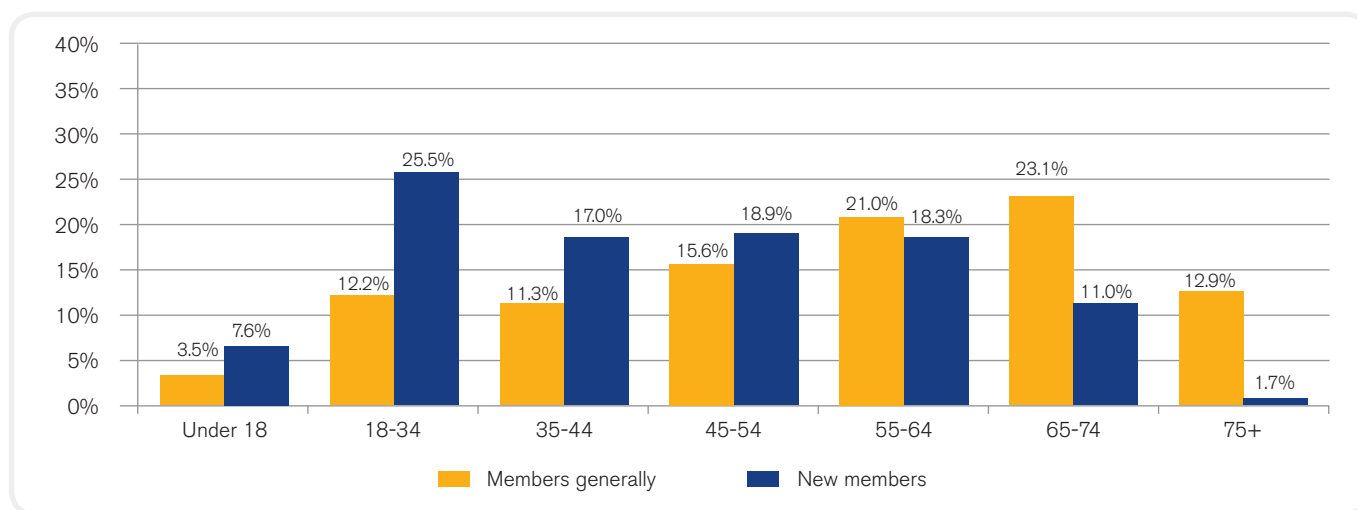
04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

New Member Profile

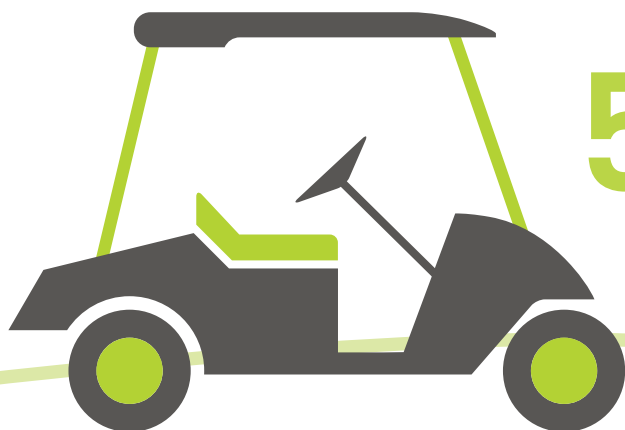
Outlined earlier in this report is the level of new membership demand recorded in 2016, approximately 8% of total golf club membership. With data sourced from GolfLink, the age profile of new members is depicted in Chart 5. 50% of new members are under the age of 45 compared to 27% for golf club members generally, indicating a lower age profile for new members.

In terms of gender, 85% of new members are male and 15% female. This suggests that the ongoing decline in the proportion of female members (currently 20% of total members) is likely to continue.

Chart 5 - New Member Age Profile



Source: GolfLink



50%

of new members in 2016 are under the age of 45 compared to 27% for all golf club members.

05 STATE MEMBERSHIP OUTCOMES

Introduction

In terms of the 73 defined intrastate golf districts across the country, 26 regions (36%) experienced positive membership growth over the period, while the other 47 regions (64%) experienced a decline.

Where female members of clubs may be classified in a different district to the male members of the same club, female membership numbers have been allocated to the male districts to allow district analysis to occur. No district analysis has been undertaken for the Northern Territory as no separate golf districts exist. Results for each state are listed in order based on the percentage change from 2015.

NSW

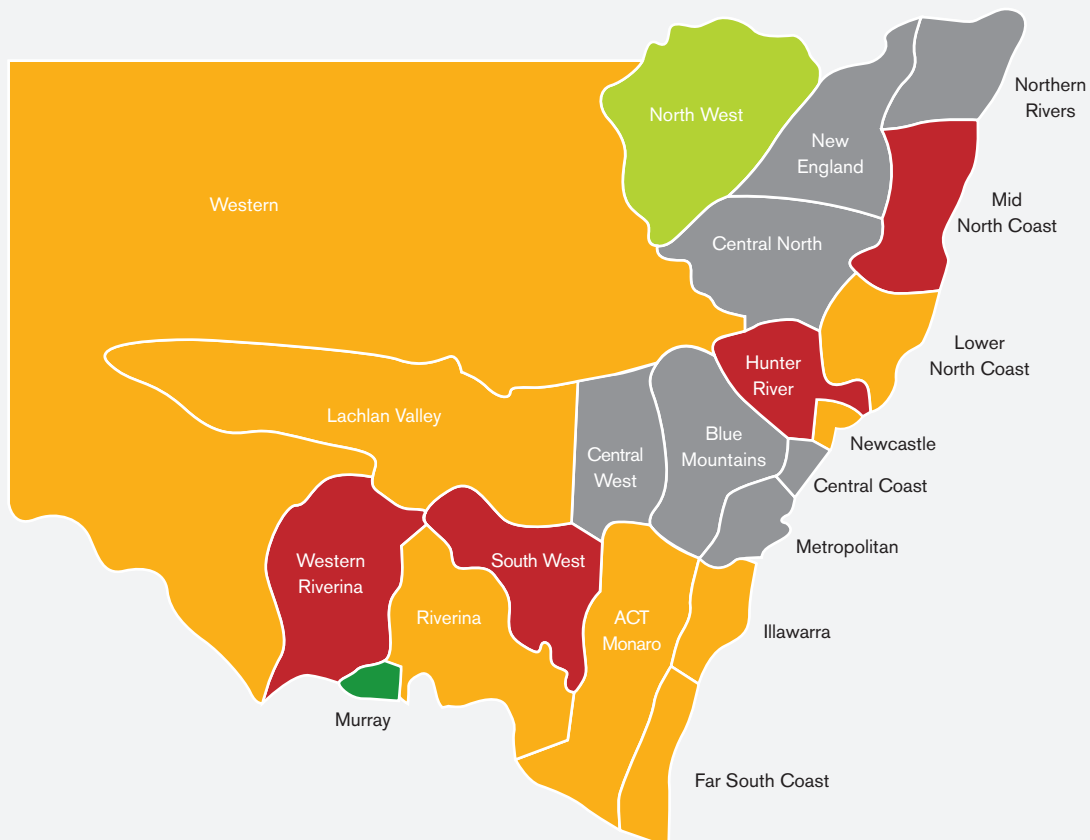
6 of the 21 districts in NSW experienced a nett increase in membership numbers in 2016, with the 12% increase evident in the Murray district continuing a positive five-year trend where an average increase of 9% is evident. The North West and Central Western districts have both experienced a nett increase in member numbers over the past 5-years. These results are depicted in Table 16.

Table 16

Region	2012	2013	2014	2015	2016	% Change	
						1 Year	5 Year
Murray	4,111	4,661	4,984	5,619	6,315	12.4%	9.0%
North West	1,033	1,031	1,055	1,080	1,116	3.3%	1.6%
Central North	2,854	2,860	2,710	2,599	2,626	1.0%	-1.7%
Central Coast	7,163	7,196	7,120	6,942	6,994	0.7%	-0.5%
New England	1,537	1,509	1,541	1,426	1,428	0.1%	-1.5%
Northern Rivers	8,585	8,143	7,798	7,643	7,650	0.1%	-2.3%
Central Western	3,500	3,480	3,484	3,628	3,598	-0.8%	0.6%
Metropolitan	66,309	65,587	63,515	63,251	62,072	-1.9%	-1.3%
Blue Mountains	2,916	2,673	2,562	2,332	2,288	-1.9%	-4.7%
Lower North Coast	5,361	5,202	4,728	4,806	4,710	-2.0%	-2.6%
Western	2,137	1,974	1,985	2,056	2,005	-2.5%	-1.3%
ACT-Monaro	10,169	9,204	8,963	9,092	8,855	-2.6%	-2.7%
Far South Coast	6,033	5,769	5,471	5,321	5,171	-2.8%	-3.0%
Newcastle	9,145	8,940	8,795	8,885	8,621	-3.0%	-1.2%
Lachlan Valley	1,046	901	914	884	854	-3.4%	-4.0%
Illawarra	10,565	9,847	9,344	9,175	8,820	-3.9%	-3.5%
Riverina	1,682	1,868	1,935	1,760	1,681	-4.5%	0.0%
Western Riverina	1,862	1,882	1,830	1,765	1,673	-5.2%	-2.1%
South West	1,518	1,413	1,373	1,407	1,318	-6.3%	-2.8%
Hunter River	3,985	4,260	4,216	4,191	3,848	-8.2%	-0.7%
Mid North Coast	5,465	5,194	5,532	5,161	4,531	-12.2%	-3.7%
NSW Total	156,976	153,594	149,855	149,023	146,174	-1.9%	-1.4%

05 STATE MEMBERSHIP OUTCOMES (CONT)

NSW - (Cont)



% Change in membership numbers from 2015 to 2016:

- > 5% positive movement
- 2% to 5% positive movement
- Less than 2% movement
- 2% to 5% negative movement
- > 5% negative movement

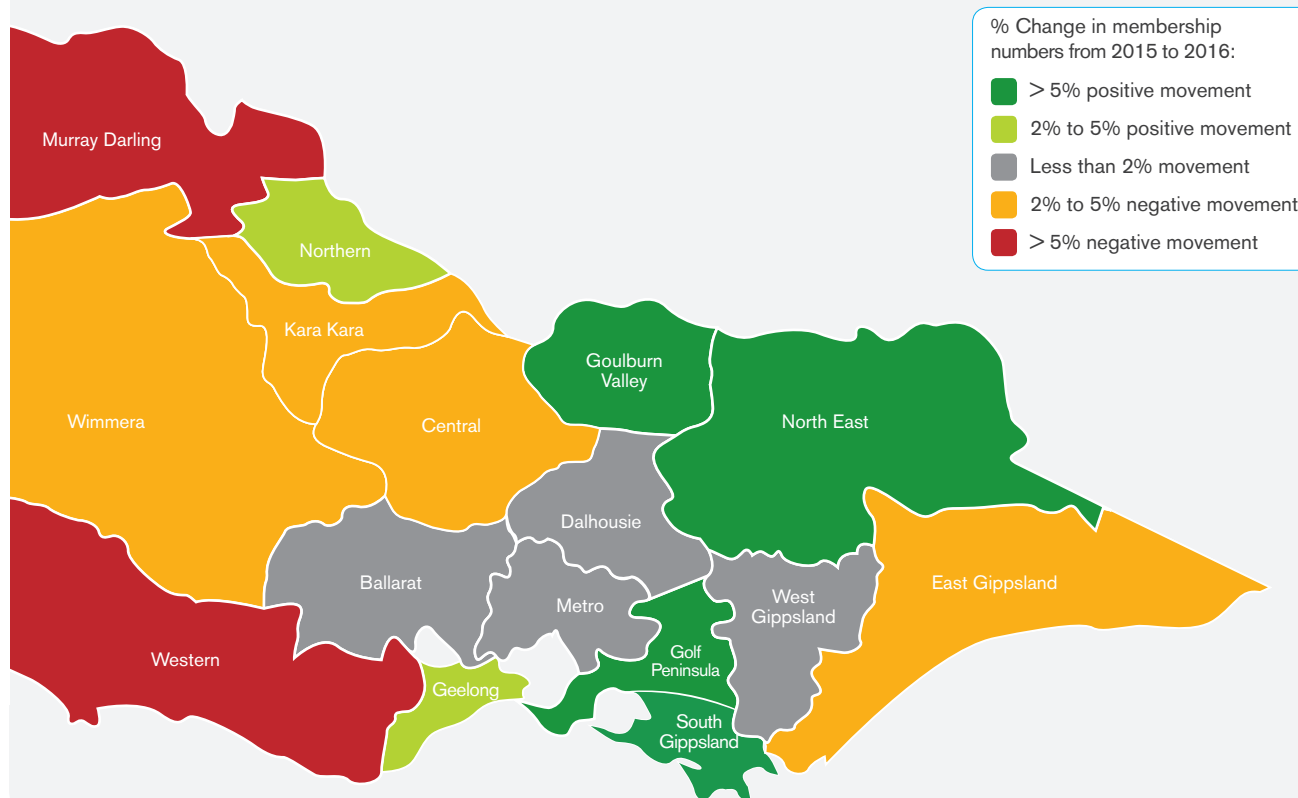
05 STATE MEMBERSHIP OUTCOMES (CONT)

Victoria

7 districts in Victoria experienced an increase in member numbers in 2016, compared to 9 that experienced a decline. Of those districts with an increase in member numbers in 2016, only two (Golf Peninsula and Geelong) aligns with a wider positive 5-year trend. These results are depicted in Table 17.

Table 17

Region	2012	2013	2014	2015	2016	% Change	
						1 Year	5 Year
Goulburn Valley	5,050	4,939	4,828	4,398	4,817	9.5%	-0.9%
Golf Peninsula	7,257	7,517	7,722	6,934	7,565	9.1%	0.8%
South Gippsland	2,608	2,566	2,473	2,291	2,474	8.0%	-1.0%
North East	5,644	5,540	5,372	5,057	5,348	5.8%	-1.1%
Northern	1,525	1,568	1,370	1,378	1,436	4.2%	-1.2%
Geelong	10,262	10,487	10,558	10,084	10,472	3.8%	0.4%
Ballarat	3,531	3,437	3,480	3,371	3,398	0.8%	-0.8%
Metropolitan	43,584	43,749	43,345	43,856	43,806	-0.1%	0.1%
Dalhousie	2,328	2,370	2,107	2,014	1,991	-1.1%	-3.1%
West Gippsland	3,604	3,735	3,314	3,488	3,437	-1.5%	-0.9%
Kara Kara	491	505	455	460	451	-2.0%	-1.7%
Central	2,896	2,992	2,747	2,884	2,815	-2.4%	-0.6%
Wimmera	2,233	2,102	2,035	2,059	2,008	-2.5%	-2.1%
East Gippsland	2,710	2,654	2,634	2,579	2,502	-3.0%	-1.6%
Western	3,862	3,889	3,859	3,649	3,466	-5.0%	-2.1%
Murray Darling	2,225	2,020	2,135	2,713	2,514	-7.3%	2.5%
VIC Total	99,810	100,070	98,434	97,215	98,500	1.3%	-0.3%



05 STATE MEMBERSHIP OUTCOMES (CONT)

Queensland

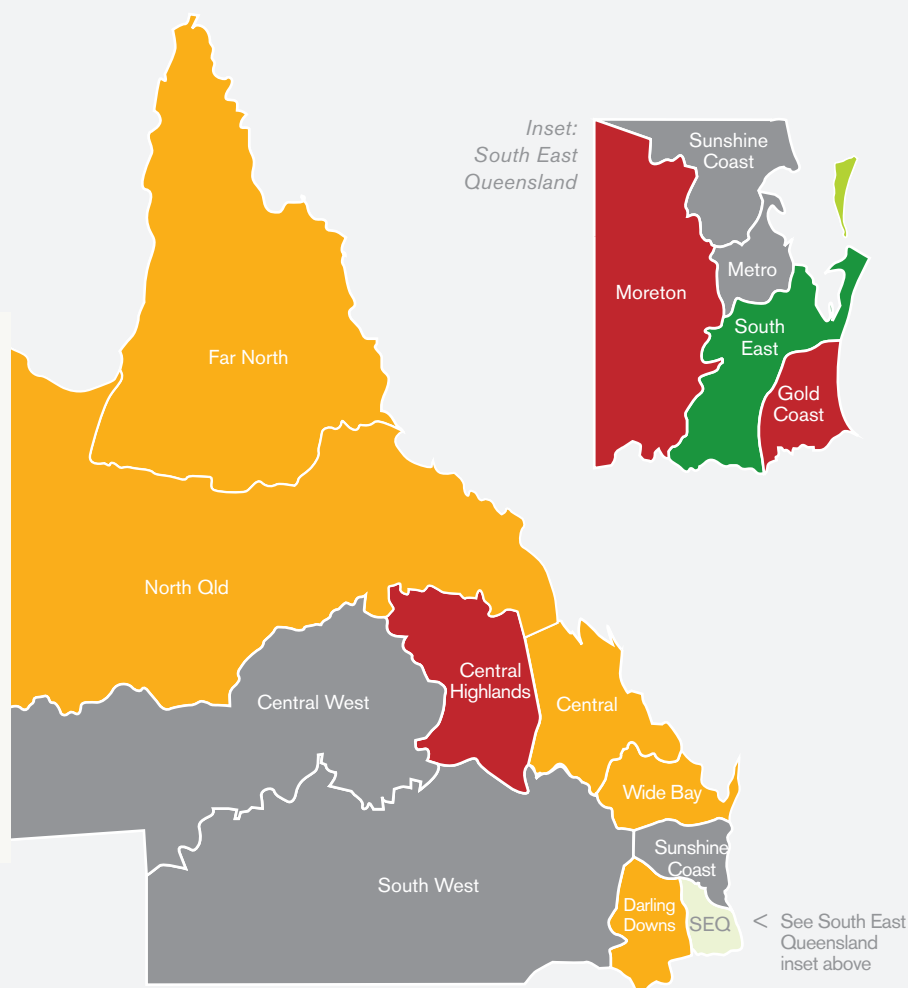
2 of the 14 districts in Queensland experienced a nett increase in membership numbers in 2016, with South-East Queensland also experiencing an increase over the past 5-year period. These results are depicted in Table 18.

Table 18

Region	2012	2013	2014	2015	2016	% Change	
						1 Year	5 Year
South East Qld	4,581	4,517	4,352	4,465	4,835	8.3%	1.1%
Metropolitan	16,121	15,715	15,113	14,653	14,737	0.6%	-1.8%
Sunshine Coast	13,275	12,593	12,582	12,587	12,435	-1.2%	-1.3%
South West Qld	676	865	847	823	812	-1.3%	3.7%
Central West	239	234	244	258	254	-1.6%	1.2%
Darling Downs	3,635	3,681	3,706	3,839	3,749	-2.3%	0.6%
Far North Qld	3,411	3,237	3,204	3,032	2,952	-2.6%	-2.8%
North Qld	4,406	4,271	4,536	4,274	4,108	-3.9%	-1.4%
Wide Bay	3,288	3,217	3,198	3,242	3,103	-4.3%	-1.2%
Central Qld	3,174	3,263	3,105	3,272	3,121	-4.6%	-0.3%
Central Highlands	878	1,014	1,307	1,382	1,285	-7.0%	7.9%
Gold Coast	11,930	11,046	10,848	10,810	9,981	-7.7%	-3.5%
Moreton	2,100	2,098	2,087	2,200	2,011	-8.6%	-0.9%
QLD Total	67,714	65,751	65,129	64,837	63,383	-2.2%	-1.3%

% Change in membership numbers from 2015 to 2016:

- > 5% positive movement
- 2% to 5% positive movement
- Less than 2% movement
- 2% to 5% negative movement
- > 5% negative movement



05 STATE MEMBERSHIP OUTCOMES (CONT)

Western Australia

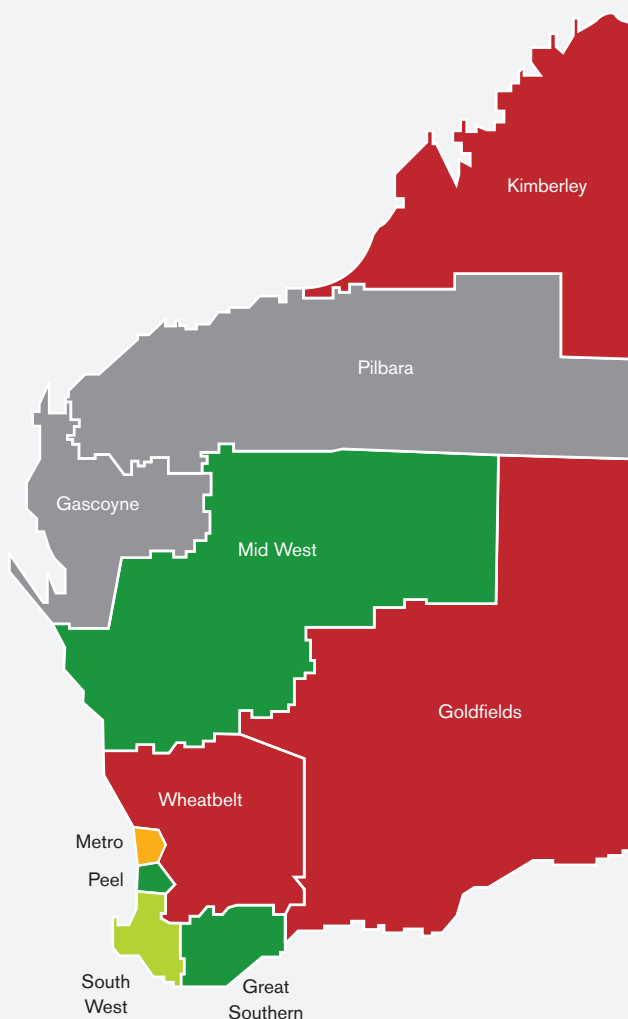
6 of the 10 districts in Western Australia experienced a nett increase in member numbers, with positive results in 2016 for the Great Southern and Peel districts continuing a positive trend over the past 5-year period. Pilbara is the only other district with a nett increase in member numbers over the past 5-years. These results are depicted in Table 19.

Table 19

Region	2012	2013	2014	2015	2016	% Change	
						1 Year	5 Year
Great Southern	1,142	1,263	1,305	1,301	1,394	7.1%	4.1%
Peel	618	681	694	717	765	6.7%	4.4%
Mid West	1,226	1,169	1,164	1,017	1,084	6.6%	-2.4%
South-West	4,172	4,108	4,199	3,943	4,029	2.2%	-0.7%
Gascoyne	132	129	131	130	132	1.5%	0.0%
Pilbara	402	495	486	422	423	0.2%	1.0%
Metropolitan	16,443	16,317	16,730	16,457	16,054	-2.4%	-0.5%
Wheat	2,412	2,295	2,299	2,399	2,241	-6.6%	-1.5%
Kimberley	434	468	448	451	410	-9.1%	-1.1%
Goldfields	1,112	1,072	1,011	975	877	-10.1%	-4.6%
WA Total	28,093	27,997	28,467	27,812	27,409	-1.4%	-0.5%

% Change in membership numbers from 2015 to 2016:

- > 5% positive movement
- 2% to 5% positive movement
- Less than 2% movement
- 2% to 5% negative movement
- > 5% negative movement



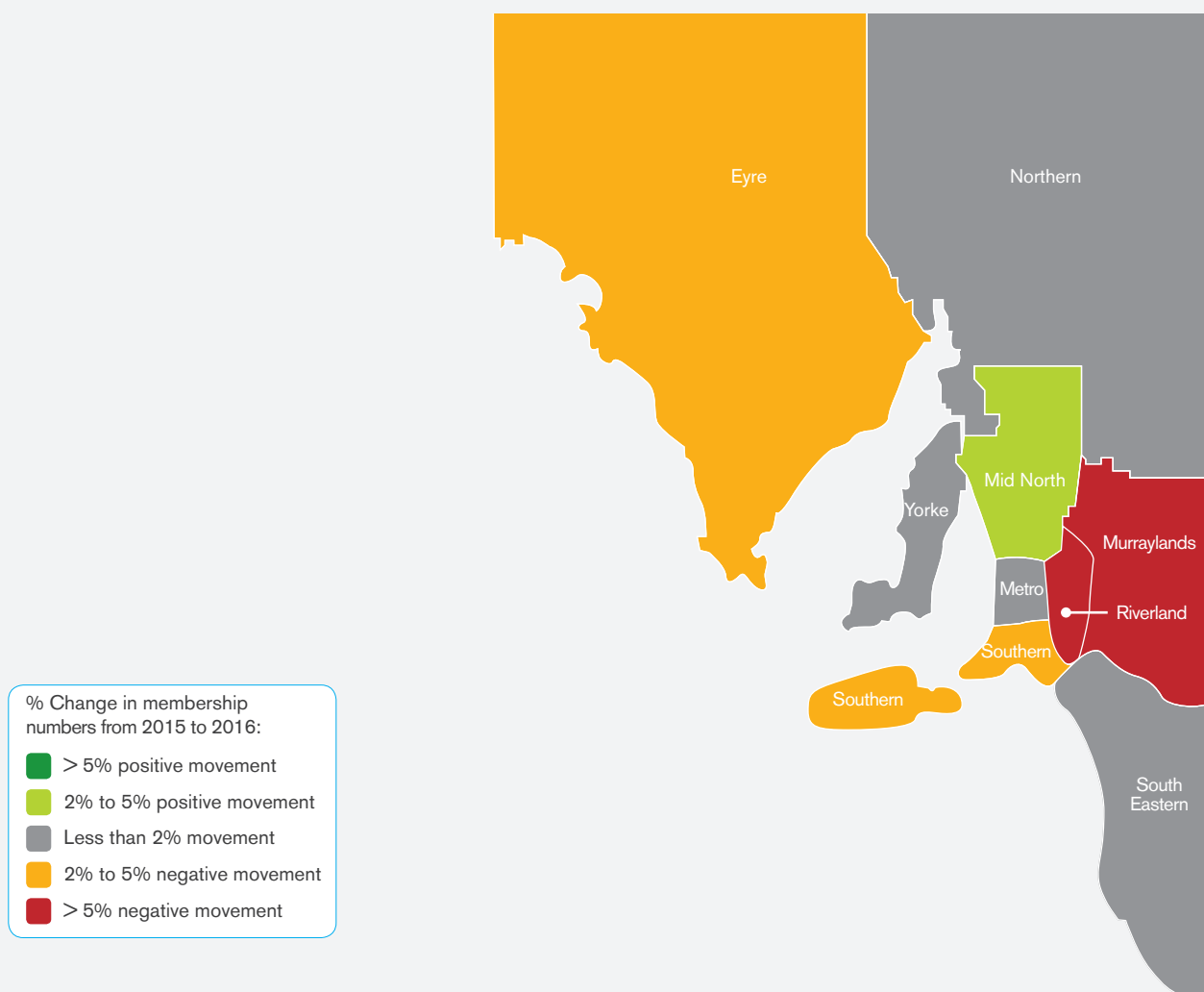
05 STATE MEMBERSHIP OUTCOMES (CONT)

South Australia

3 of the 9 districts experienced a nett increase in membership numbers in 2016, however each of those districts have experienced a nett decline over the past 5-year period. Only the Eyre district has experienced a nett increase in member numbers over the past 5-years. These results are depicted in Table 20.

Table 20

Region	2012	2013	2014	2015	2016	% Change	
						1 Year	5 Year
Mid North	1,598	1,423	1,404	1,384	1,421	2.7%	-2.3%
South Eastern	1,738	1,758	1,667	1,630	1,650	1.2%	-1.0%
Northern	1,003	994	990	952	960	0.8%	-0.9%
Metropolitan	13,553	13,238	13,153	12,990	12,902	-0.7%	-1.0%
Yorke	981	923	938	982	972	-1.0%	-0.2%
Eyre	1,157	1,176	1,179	1,226	1,182	-3.6%	0.4%
Southern	3,599	3,408	3,534	3,607	3,449	-4.4%	-0.8%
Murraylands	730	717	728	702	665	-5.3%	-1.8%
Riverland	556	562	631	590	528	-10.5%	-1.0%
SA Total	24,915	24,199	24,224	24,063	23,729	-1.4%	-1.0%



05 STATE MEMBERSHIP OUTCOMES (CONT)

Tasmania

Of Tasmania's four districts, two experienced an increase in member numbers and two experienced a decrease. All districts however have declined over the past 5 years. These results are depicted in Table 21.

Table 20

Region	2012	2013	2014	2015	2016	% Change	
						1 Year	5 Year
North	3,578	3,510	3,468	3,270	3,316	1.4%	-1.5%
Southern Metropolitan	2,359	2,170	2,173	2,178	2,206	1.3%	-1.3%
North West	2,588	2,531	2,438	2,348	2,318	-1.3%	-2.2%
Southern Country	3,322	3,099	3,029	2,909	2,815	-3.2%	-3.3%
TAS Total	11,847	11,310	11,108	10,705	10,655	-0.5%	-2.1%

% Change in membership numbers from 2015 to 2016:

- > 5% positive movement
- 2% to 5% positive movement
- Less than 2% movement
- 2% to 5% negative movement
- > 5% negative movement



06 CLUB COMPETITION ROUNDS

National Results

For the 2016 calendar year approximately 14.85 million rounds were recorded by GolfLink across the same facility base, a 2.1% increase over the same twelve month period in the prior year.

Compared to 2015, slightly higher growth was recorded in rounds played by male golfers, accounting for 82% of all rounds played, as summarised in Table 22.

Table 22

Gender	2016	2015	% Change
Male	12,222,707	11,926,154	2.4%
Female	2,627,719	2,615,935	0.4%
Total	14,850,426	14,542,089	2.1%
% male share	82%	82%	

Source: GolfLink, Golf Australia, GBAS

Male and female competition rounds in 2016 grew by 2.4% and 0.4% respectively.

Based on data obtained from the Golf Management Australia Benchmarking Tool, we estimate that competition rounds account for approximately 63% of total rounds played across all course-based golf clubs. Member and non-member social rounds account for 19% and 18% respectively. Based on this, it is estimated that a total rounds played across all clubs approximates 24 million.

Based on data from GolfLink, the average playing frequency per member across all clubs is just under 33 annually. Over the past five year period, average playing frequency has increased from 31. This average frequency is higher for metropolitan clubs at 35 annual rounds, dropping to 31 for regional clubs. These results are depicted in Table 23.

Table 23

Region	2012	2013	2014	2015	2016	% Change	
						1 Year	5 Year
Metropolitan	33.8	34.0	34.8	34.7	35.1	1.0%	0.7%
Regional	29.6	29.8	30.7	30.9	31.4	1.6%	1.2%
Social	27.7	29.9	31.2	32.3	30.9	-4.2%	2.2%
Overall	31.1	31.4	32.2	32.4	32.7	1.0%	1.0%

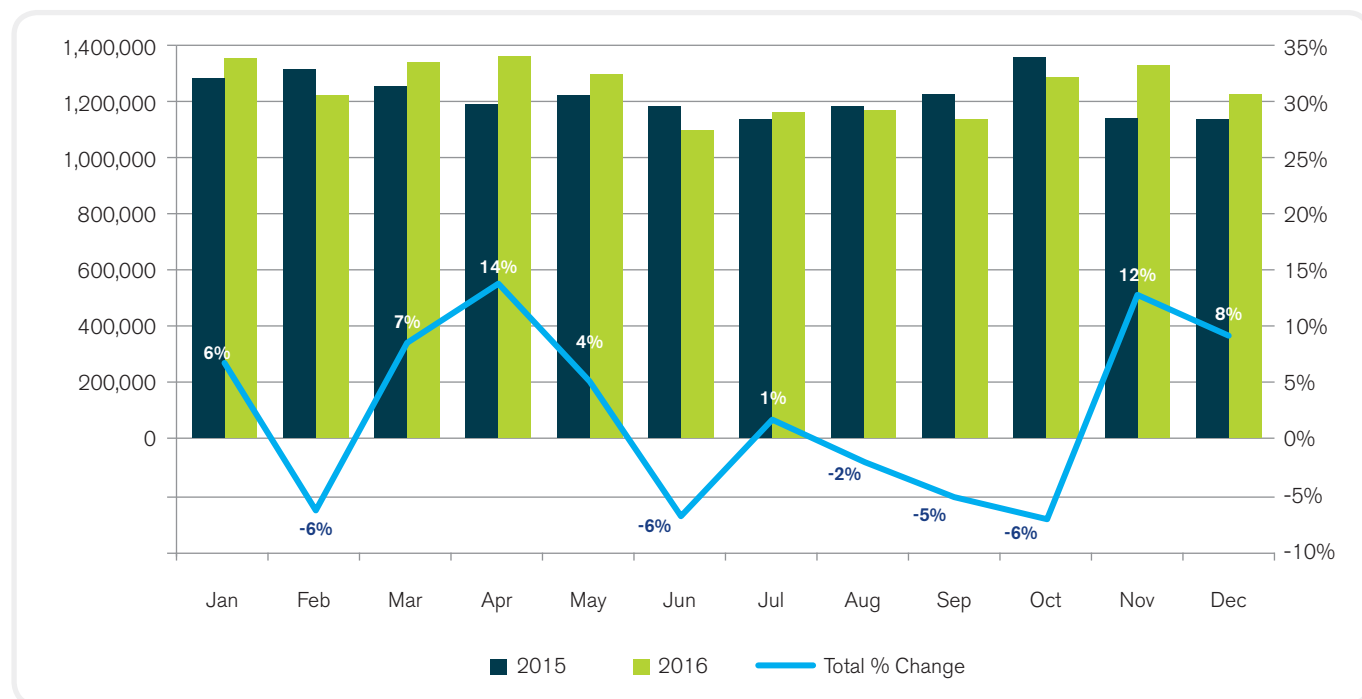
Source: GolfLink

We estimate that competition rounds account for approximately 63% of total rounds played across all course-based golf clubs

06 CLUB COMPETITION ROUNDS (CONT)

Month over month competition rounds growth was achieved in seven of the twelve monthly periods as illustrated below in Chart 6.

Chart 6



Source: GolfLink, Golf Australia, GBAS



06 CLUB COMPETITION ROUNDS (CONT)

Results by State/Territory

Queensland experienced the largest increase in rounds played for the financial year, recording 5% growth over 2015, largely due to strong outcomes at the beginning and end of the year. Queensland was the only state to record growth across each quarter with all other states experiencing disruptive weather during the year.

Annual declines were recorded in South Australia and Tasmania, both materially impacted through the winter months.

Rounds played by state for each quarter of 2016 and the movement recorded over the corresponding period in 2015 are summarised in Table 24.

Table 24

2016	Jan - Mar	April - June	July - Sept	Oct - Dec	Total
NSW	1,401,627	1,354,974	1,279,326	1,440,855	5,476,782
VIC	1,103,164	989,648	864,009	998,433	3,955,254
QLD	674,511	689,026	713,224	679,133	2,755,894
WA	293,348	314,065	300,410	299,090	1,206,913
SA	282,611	265,028	234,172	260,285	1,042,096
TAS	100,282	83,739	70,951	86,814	341,786
NT	17,705	18,544	19,012	16,440	71,701
Total	3,873,248	3,715,024	3,481,104	3,781,050	14,850,426
% change over PY					
NSW	(0.7%)	+8.8%	(2.4%)	+7.0%	+3.0%
VIC	+3.3%	+0.4%	(3.0%)	+1.5%	+0.7%
QLD	+8.9%	+5.0%	+1.5%	+6.7%	+5.4%
WA	(1.8%)	+1.1%	(1.3%)	+4.6%	+0.6%
SA	+0.4%	(2.6%)	(4.3%)	+1.1%	(1.3%)
TAS	+2.2%	(0.6%)	(12.7%)	(9.5%)	(4.9%)
NT	+7.9%	(2.7%)	(1.8%)	+12.4%	+3.2%
Total	+2.1%	+4.0%	(2.1%)	+4.4%	+2.1%

Source: GolfLink, Golf Australia, GBAS

06 CLUB COMPETITION ROUNDS (CONT)

Results by Capital City

Slightly softer results were recorded in the metropolitan markets than those recorded nationally with the collective capital cities enjoying only 1.2% growth over 2015. Standout markets were Brisbane and Sydney, with 6.8% and 3.4% rounds growth respectively recorded for these markets.

Rounds played by the major metropolitan markets in each state for each quarter of 2016 and the movement recorded over the corresponding period in 2015 are summarised in Table 25.

Table 25

2016	Jan - Mar	April - June	July - Sept	Oct - Dec	Total
Sydney	638,867	607,056	602,994	676,746	2,525,663
Brisbane	145,656	144,216	148,759	140,726	579,357
Adelaide	185,129	164,542	146,582	172,072	668,325
Melbourne	545,806	479,610	441,108	497,115	1,963,639
Perth	186,183	188,019	180,752	190,930	745,884
Total	1,701,641	1,583,443	1,520,195	1,677,589	6,482,868

% change over PY

Sydney	(0.8%)	+6.8%	(0.9%)	+8.9%	+3.4%
Brisbane	+12.4%	+6.0%	+2.7%	+6.5%	+6.8%
Adelaide	(0.6%)	(4.0%)	(4.5%)	+0.1%	(2.1%)
Melbourne	+2.8%	(1.1%)	+1.2%	+2.7%	+1.4%
Perth	(10.8%)	(9.5%)	(10.7%)	+5.0%	(6.9%)
Total	+0.1%	+0.9%	(1.6%)	+5.4%	+1.2%

2016	Jan - Mar	April - June	July - Sept	Oct - Dec	Total
Total Metropolitan	1,701,641	1,583,443	1,520,195	1,677,589	6,482,868
Total Regional	2,171,607	2,131,581	1,960,909	2,103,461	8,367,558
Total	3,873,248	3,715,024	3,481,104	3,781,050	14,850,426

% change over PY

Total Metropolitan	+0.1%	+0.9%	(1.6%)	+5.4%	+1.2%
Total Regional	+3.7%	+6.4%	(2.4%)	+3.7%	+2.8%
Total	+2.1%	+4.0%	(2.1%)	+4.4%	+2.1%

Source: GolfLink, Golf Australia, GBAS



In 2016, competition rounds in metropolitan and regional areas grew by 1.2% and 2.8% respectively

07 PROGRAM PARTICIPANTS, EVENTS, DELIVERERS & OFFICIALS

Table 26 summarises a number of key participation areas that are measured by Golf Australia as a requirement to report to the Australian Sports Commission.

Table 26

CATEGORY	2012/13	2013/14	2014/15	2015/16
Program Participants				
MyGolf National Junior Program	4,846	939	3,480	6,254
Other Non-MyGolf Junior Programs	8,974	12,577	10,586	11,696
Crown Lager Social/GA Social Golf Club	2,478	2,898		
Qantas Golf Club			35,486	121,080
Other Casual Golf Programs	7,550	7,027	3,268	6,595
Indigenous	2,513	1,458	1,687	1,888
Disability	1,549	2,224	2,645	5,956
Female	15,005	12,536	7,363	6,380
Seniors	13,213	14,063	4,068	3,595
New Formats			6,342	29,032
Swing Fit				430
Other programs	1,004	2,576	1,305	1,370
	57,132	56,298	76,230	194,276
Event Entries (Men/Women/Mixed/Jnrs)				
Member Association State & Territory Events	56,575	50,894	56,798	57,573
Junior Foundation Events	7,447	7,696	9,232	8,215
Golf Australia National Events	1,724	1,665	1,545	1,631
PGA Events	98,422	93,829	96,656	82,944
ALPG Events	791	959	952	1,123
	164,959	155,043	165,183	151,486
School Delivered Programs Participants				
MyGolf Schools 1 (primary) program	45,936	56,499	52,404	47,819
MyGolf Schools 1 (primary) "tasters"	47,556	36,781	26,631	28,202
AASC/Sporting Schools Golf Program	13,820	16,035	8,292	18,124
MyGolf Schools 2 (secondary) program	24,854	22,748	19,619	16,049
MyGolf Schools 2 (secondary) "tasters"	2,312	1,518	518	595
Other Non-MyGolf School Programs	5,687	7,991	7,053	7,214
	140,165	141,572	114,517	118,003
School Managed Competitions Participants				
SSA 12 Yrs & Under Championship	2,401	3,698	4,623	3,668
SSA 19 Yrs & Under Championship	1,014	1,639	1,503	1,724
	3,415	5,337	6,126	5,392
Program Deliverers & Officials				
Development Personnel	33	34	34	40
Community Golf Leaders & Coaches	1,383	1,728	1,699	1,496
AASC/Sporting Schools Golf Coaches	678	502	419	182
PGA Coaches	1,615	1,562	1,652	1,662
ALPG Coaches	57	57	72	84
Rules Officials	4,886	4,796	4,563	4,736
Course Raters	418	248	157	96
	9,070	8,927	8,596	8,296

NB: The data may include the counting of a participant each time they engage in the activity. Participants may be recorded across multiple categories. Development personnel are those employed by Golf Australia, Member Associations and Junior Foundations.

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