

2022-2025

THE INAUGURAL NATIONAL STRATEGY FOR AUSTRALIAN GOLF

FOREWORD

On behalf of Golf Australia, the PGA of Australia and the WPGA Tour of Australasia, we are delighted to introduce the inaugural Australian Golf Strategy.

This plan has been developed with the input of nearly 10,000 people across golf, and has included extensive consultation, interviews, workshops, and research. Through this process we have seen a high level of anticipation and optimism about the future of our sport and what is possible.

The spike in interest and participation through the global pandemic is not something that we take for granted. But the recent growth is material – and provides significant momentum as we enter 2022 and this strategy cycle.

This new strategy gives golf in Australia a strong sense of direction. It has allowed us to collectively lift our eyes to golf's enormous potential as a sport for all. We share the industry's excitement about the opportunities ahead – and commit to serving Australian Golf and its millions of golfers.

We are motivated by our purpose of encouraging and supporting more Australians to play more golf, and are united in our belief that all golf is golf, and that all of us can be golfers. Those of us playing, volunteering, and working within Australian golf understand that golf is a sport for life and fun for all, and our responsibility as custodians of golf is to promote that message far and wide.

In recognizing golf as a fun sport for life, we highlight a component of our competitive advantage. All of us involved in the game as players, employees and volunteers have a duty to promote that message and encourage new people to our sport.

We hope that you share our optimism about golf's future and we are looking forward to working together closely as we put this plan into action.



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James Sutherland CEO, Golf Australia



Karen Lunn CEO, WPGA Tour of Australasia



Gavin Kirkman CEO, PGA of Australia

-THE CONTEXT

The past eighteen months have, on the whole, been kind to Australian Golf. Public courses and driving ranges are busier than they have been in years, and many clubs have waiting lists for new members. The changes in behaviour, and perhaps the shift in priorities, in response to the global pandemic have been a factor in an estimated 21% increase in Australian golf participation over the past twelve months.

However, the fact remains that over the prior 20 years golf membership was in a period of protracted decline, falling by around 1% annually while the Australian population grew by between 1-2% each year. This decline followed a similarly lengthy period of sustained growth in golf membership from 1970 until the turn of the century. The share of female members has fallen from around a third to a fifth, and the average age of a club member is 55 for men and 64 for women, far older than Australia's median age of 37. Golfers are wealthier than the average Australian, with that participation strongly correlated with income. Golfers are also less likely to come from recent migrant backgrounds than the average Australian. To achieve our ambitions as a sport for all, we need greater diversity in our participation base.

Similar demographic data for those playing at public courses, driving ranges, mini golf and simulators does not exist – itself an opportunity to address – however it is clear that the common perception of golf, as an exclusive and expensive sport, is matched to an extent in reality. We must challenge this perception, and change this reality. We must attract new golfers by telling great stories focusing on the benefits of our game to health, wellbeing, communities and perhaps most importantly, a sense of achievement and enjoyment. We heard very clearly throughout the development of this strategy that golf is fun, and we need to share that message to grow our game.

Growing golf will mean more rounds at public courses, more demand for membership at golf clubs across the country, more lessons for PGA Members, an increase in PGA Membership, more fans and more investment in a new set of clubs that will finally fix that slice. We know that prior to the onset of the pandemic nearly half of clubs and facilities across Australia were facing some form of financial distress, and we have also witnessed increasing pressure from councils and communities to demonstrate inclusivity, sustainability and a good use of valuable land. Clubs and facilities that have experienced strong growth have been those with a clear customer-oriented approach to great service and forms of golf that people want to play. We are fortunate to have a number of excellent case studies for growth from courses and facilities across Australia and the world.

Growing the game is the best response to the challenges and opportunities that golf is facing, and this plan will set a direction that enables us to achieve our goals and deliver sustainable benefits for the entire industry.



THE PLAN

Our strategy is built around three key focus areas, supported by two enablers of growth. The strategy balances the most passionate club members who comprise the core of Australian golf, with a desire to grow our game by attracting new people to golf. Inspiring existing, returning and new golfers to play more golf through simple, compelling messages that we share at every opportunity and via every channel, especially clubs and facilities, is critical.

We will support these three priorities by growing golf's fanbase, digital products and commercial value for reinvestment, and we will work together across our industry to align behind our national strategy.

STRATEGY OVERVIEW

OUR PURPOSE

More Australians playing more golf

All golf is golf

STRATEGIC PILLARS





Tell our story better

Attract new golfers

STRATEGIC ENABLERS



Attract new fans & grow revenue

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OUR PHILOSOPHY

and all of us can be golfers

OUR POSITIONING

A sport for life and fun for all



Grow our core

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Work together

TELL OUR STORY BETTER

Our ambition is that golf is seen as a sport for life, and fun for all

SUCCESS WILL BE MEASURED BY







Reality of Golf



Audience

Metrics



Consistency of Message

TO ACHIEVE SUCCESS WE WILL

- Understand the frequent perception of golf we are fighting: an intimidating, exclusive, 1.1 rules-bound game for rich old men.
- **1.2** Agree simple industry-wide messages to change this, i.e. the 3Ps: (1) Our Purpose: More Australians Playing More Golf.
 - (2) Our Philosophy: All Golf Is Golf and All Of Us Can Be Golfers.
 - (3) Our Positioning: A Sport For Life and Fun For All.
- **1.3** Communicate these messages at every opportunity through every available channel, especially via clubs and facilities. Our goal is to:
 - (A) Galvanise the golfing community to share our love of the sport, hence
 - (B) Attract people to golf, and
 - (C) Educate government and other stakeholders on golf's value to the community.
- **1.4** Support via national marketing and communications strategy focused on digital, social and earned media. This includes:
 - (A) Agreeing final brand strategy and tagline.
 - (B) Using the right people to promote participation - both elite and community golfers and high-profile golf-lovers from other walks of life.
 - (C) Reviewing all existing events, programs and collateral to ensure alignment with our core messages.



Our ambition is more Australians playing more golf in all its forms: All golf is golf & all of us can be golfers

SUCCESS WILL BE MEASURED BY



of golfers across all formats

Female participation

TO ACHIEVE SUCCESS WE WILL

- 2.1 ranges, short courses, public courses, private courses and Tours.
- Ensure that at least 80% of Australians have reasonable access to the full range of 2.2 councils and private providers.
- **2.3** Commit to making all clubs and facilities welcoming environments from entry through enquiry, learning, playing, shopping and hospitality. Adopt a service not compliance mentality, with an emphasis on enjoyment and fun.
- Get more kids, women and families playing golf. Roll out 2.4 standard national programs for kids, women and families (e.g. MyGolf, Get Into Golf and a family equivalent) in every club and facility where feasible.
- 2.5 Support new and existing golfers with useful, engaging and coordinated industry digital initiatives e.g. national course/facility and lesson booking system (i.e. OpenTable for golf), building social elements into existing platforms (i.e. Strava for golf).
- **2.6** Increase participation and visibility of women in all parts of golf. Tailor Vision 2025 to National Strategy and double down on highest priorities.

ATTRACT NEW GOLFERS



Growth in participation by demographic



Access to alternative formats across Australia

2025

2022

Recognise all formats in a consistent national pathway: mini golf, simulators, driving

formats and facilities. Do so via national audit and appropriate partnerships with clubs,

GROW OUR CORE

Our ambition is that golf clubs & facilities are vibrant, solvent, sustainable community hubs

SUCCESS WILL BE MEASURED BY





On course health of clubs & facilities

Financial health of clubs & facilities



Sustainability of clubs & facilities

TO ACHIEVE SUCCESS WE WILL

- Recognise that clubs and facilities are the core of our sport and the key to our strategy. 3.1 Ask for their assistance in growing Australian golf by emphasising fun and enjoyment, bringing in more kids, women and families, and providing great service and experiences. Retention of those already playing golf is key through embedded retention plans.
- Maintain golf clubs' social licence via two-prong strategy: 3.2
 - Community inclusion grow and diversify golf (per Pillar 2).
 - Environmental sustainability develop a whole-of-sport environmental sustainability strategy framework.
- Engage proactively with Councils, clubs and State governments in LGAs with greatest 3.3 threats and greatest opportunities in line with a coordinated government relations strategy.
- Support clubs and facilities with targeted shared and advisory services 3.4
 - Devise national services and systems that make life better for all golfers, PGA Members and clubs, including prioritised digital initiatives.
 - Share relevant case studies of best practice through a central portal for all types of clubs/facilities - city/regional, professionally-run/volunteer-run, public/private etc.
 - Provide individual club/facility support where need is greatest.
- 3.5 Develop golf's workforce - both professional and volunteer - to deliver great services to their golfing 'customer' in line with the Australian Golf Strategy by implementing the PGA Golf Learning Hub and working closely with ASTMA, GMA and member clubs.

ATTRACT NEW FANS & GROW REVENUE

Our ambition is to inspire Australian golfers with great events & digital products and generate new revenue to reinvest in growth

SUCCESS WILL BE MEASURED BY





Fan-friendly summer of golf that grows audience and revenue over time

Quantity & quality of digital engagement

TO ACHIEVE SUCCESS WE WILL

- **4.1** Confirm ambition, plan and schedule for Australian Summer of Golf including strengthened men's and women's Tours.
- **4.2** Aggregate and package key events, commercial and media rights. Sell as one sport to government, media and commercial partners.
 - Aggregation must be based on either a "no worse off" or a risk-sharing financial model so event owners have a reason to participate.
- 4.3 Implement prioritised digital and data strategy, including:
 - Developing, buying or partnering with key products to drive golfers' engagement on and off course.
 - Growing size and commercial value of first party data.
- Commercialise entry level programs via sponsorship and efficient business models. 4.4
- 4.5 Increase long term external funding from benefactors, government and industry partners including via Australian Golf Foundation. Reinvest in: • Direct participation programs and/or national marketing campaigns.

 - High performance programs to develop the next Australian golfing heroes.







Success and profile of Australian golfers

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THANK YOU

Our ambition is to grow golf as efficiently, collaboratively and sustainably as possible

We all have a role to play, and we look forward to working with you to grow our game.

SUCCESS WILL BE MEASURED BY





Increasing industry data sharing



Increasing industry representation

TO ACHIEVE SUCCESS WE WILL

- 5.1 Continue to align GA, PGA and WPGATA. Includes
 - This all-of-golf strategy.
 - Co-location at the Australian Golf Centre (Sandringham) and shared offices where opportunities identified (starting with Queensland).
 - Removal of silos and elimination of operational duplication e.g. organising by function and location.
- **5.2** Continue to align States and GA via:
 - This all-of-golf strategy.
 - Extending OneGolf where feasible.
 - Continuing to build direct links with traditional clubs, public courses and private facility operators and ensure they are appropriately represented. Also work with Club GMs via GMA.
- **5.3** Continue to use AGIC as the key all-of-industry forum.
- **5.4** Maintain national reach and footprint but remove layers and silos where possible.
- **5.5** Create means of representation for private and public facilities not currently within administrative structure of golf (e.g. mini golf, ranges).



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