



GolfAustralia



2014 Golf Participation Report

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01 KEY FINDINGS



Golf Australia, in conjunction with Golf Management Australia (GMA), is pleased to present to you the 2014 National Participation Report.

Despite an overall decline in club membership of 7% since 2010, approximately 44% of golf clubs have experienced a net increase in membership in the last 12 month period.

The key findings from 2014 are outlined below:

- Based on current research and other industry reports it is presently estimated that total golf participants in Australia approximate 1.1 to 1.2 million golfers.
- For the year ending 2014, national membership numbers across Australia approximated 397,000 golfers, representing a reduction of 0.7% from the previous year. In actual terms, the decline nationally approximates 3,200 members.
- Approximately two thirds of golf clubs in Australia have less than 200 members in size, with 83% having less than 500 members.
- 73% of all clubs in Australia are located in a regional area.
- Whilst accounting for only 5% of clubs across the country, clubs of over 1,000 members account for 25% of total members.
- NSW has the most number of golf clubs with 378, and the highest average member count with 396. Western Australia has the lowest average member count with 146.
- A cumulative loss of 7.2% has been recorded across the membership base since 2010, which equates to an average annual reduction of 1.7%. The overall 2014 outcome saw a continuation of the pattern evident over the prior three years, albeit the rate of decline slowed compared to the 2011, 2012 and 2013 outcomes.
- In percentage terms, Western Australia was the strongest performing state in 2014 with an increase in their membership base of 2.2%. This result was driven by increases at metropolitan clubs. Victoria and South Australia experienced small increases in membership numbers.
- NSW was the poorest performing state and accounts for most of the overall reduction in membership numbers across Australia. The reduction of 2.4% was driven by reductions in both the metropolitan and regional areas. Queensland, Tasmania and the Northern Territory experienced small declines in their membership base.
- Metropolitan and regional clubs nationally each experienced a decline in the membership bases of 0.7%.
- When assessed by gender, male members declined by 0.5% while female membership declined by 1.4%.
- Nationally, female members account for 21% of the total membership base.
- The national attraction and attrition rates for the past year are 11.7% and 12.5% respectively, although attraction and attrition rates vary significantly according to club size.
- The three states with the lowest attrition rates, Western Australia (10.2%), Victoria (11.2%) and South Australia (12.6%) are the three states which experienced positive membership growth.
- 44% of clubs nationally (with more than 100 members) experienced positive movement in their membership levels for the year, with 15% of clubs reporting more than 10% growth.
- The Australian population base exhibits a much more even age spread than that of the club golf profile, with approximately 60% of the national club golf membership base aged 55 years or greater.
- Reported junior members (under the age of 18) account for 3.5% of total members across the nation. This proportion is higher for males than females, with 4.0% of male members being juniors while 2.3% of female members are juniors. NSW has the highest proportion of junior members at 3.6%.



The key findings with regard to competition rounds played trends from 2014 are outlined below:

- For the twelve month period to end December 2014 approximately 14.3 million rounds were recorded by GolfLink across the same facility base, a 7.2% increase over calendar year 2013.
- Queensland experienced the largest increase in rounds played for the year, recording approximately 13% growth over 2013, largely due to an exceptional strong 1st quarter.
- Victoria and South Australia were the only other two states to record growth in all four quarters of the year.
- The national result of 7.2% was reasonably consistent across the metropolitan and regional market, with 6.2% and 8.0% rounds growth respectively recorded for these markets.



For the **twelve month period to end December 2014** approximately **14.3 million rounds** were recorded by GolfLink across the same facility base, a **7.2% increase** over calendar year 2013.

02 REPORT BACKGROUND



GolfAustralia



Introduction

Golf Australia, in conjunction with Golf Management Australia (GMA), is pleased to present to you the 2014 National Participation Report. It continues to be the goal of both bodies to provide the wider golf industry with key participation information that enables the sport to understand the current landscape and trends in golf participation. It is hoped that this report therefore becomes a valuable reference for the development of evidenced based strategies designed to drive 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 and GMA sought the expertise of Golf Business Advisory Services (GBAS) to draft this report. GBAS authored the 2013 report and have also authored a number of other industry reports covering such topics as club operational and salary benchmarking, membership attrition and retention, national rounds played, golf retail and other industry challenges including land management, the environment, cost structures, and corporate governance. For more information on GBAS please visit www.golfbas.com



03 NATIONAL CLUB MEMBERSHIP OVERVIEW

Introduction

The following section provides an overview of current national golf participation data. This section relies upon data published by the Australian Sports Commission (ASC) between 2001 and 2011. We note that no national participation data is available beyond 2010, the last year in which the ASC delivered its Participation in Exercise, Recreation and Sports (ERASS) Report.

Total Participation in Golf

In 2011 the Australian Sports Commission ceased producing its annual sports participation survey. This report, known as the ERASS report was utilised by Golf Australia to monitor overall participation in golf. At that time it was estimated that approximately 1.18 million people or 6.7% of the Australian adult population aged 15 or over play golf. This estimate had been relatively steady since 2009.

In its recently released Play.Sport.Australia - National Participation Game Plan, the ASC announced that it is to resume its national sports participation research with a new annual survey to be developed to better understand participation trends in Australia, inform policy decisions and guide sports strategy with a strong evidence base. Golf Australia is supportive of this initiative and looks forward to providing wider, up to date clarity regarding total participation in golf.

Via the ASC, national research house Repucom produces an annual report for the major national sporting organisations titled "The Australian Sporting Landscape – the Consumer Perspective." Amongst other things such as consumer engagement, motivations, brand imagery, and attendance, the reports contain a high level analysis of participation levels. For the past two reports, the national participation level for golf has been estimated at 7%. This estimate is in line with estimates made for golf when the ASC stopped publishing its ERASS report.

In light of no other data being available or collected and with no other data suggesting anything to the contrary, Golf Australia is of the view that the participation estimates made by the ASC in 2011 and the outcomes currently presented by Repucom remain a reliable indicator of current wider golf participation demand trends.

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 depicted in the chart below:

State / Territory	Annual Report	Data Collected	Period
NSW	2013/14	May 2014	Most recent completed financial year
VIC	Calendar Year 2014	December 2014	Most recent completed financial year
QLD	Calendar Year 2014	December 2013	Point in time
SA	2014/14	December 2013	Point in time
WA	2013/14	December 2013	Point in time
TAS	Calendar Year 2014	June 2014	Point in time
NT	2013/14	December 2013	Point in time

Note: Throughout the report, NSW includes results from the ACT.



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 74 national regions and 1,591 clubs. As in 2013, 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 2014 numbers with the three prior years of historical results classified as the 2011, 2012 & 2013 years respectively.

Note: A different capitation fee collection methodology is being undertaken in Victoria this year and this has prevented it from providing annual numbers in time for this publication. The Victorian data used for aggregation in this report is thus more dated this year.

03 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Profile of Australian Clubs

The current size profile of Australian golf clubs, based on the 1,590 clubs that reported playing membership numbers for 2014, is outlined by general geographic location / club type in Table 1.

Table 1

Club Membership Size	Metro	Regional	Social	Total	% of Clubs	% of Members
<100	11	613	196	820	52%	8%
100-199	9	192	20	221	14%	8%
200-299	13	101	6	120	8%	8%
300-399	19	58	6	83	5%	7%
400-499	15	48	1	64	4%	7%
500-599	18	44	–	62	4%	9%
600-699	17	31	1	49	3%	8%
700-799	13	20	–	33	2%	6%
800-899	21	15	–	36	2%	8%
900-999	17	11	–	28	2%	7%
1000-1099	20	6	–	26	2%	7%
1100-1199	9	5	–	14	1%	4%
1200-1299	5	1	–	6	0%	2%
1300-1399	9	2	–	11	1%	4%
1400-1499	2	1	–	3	0%	1%
1500+	8	7	–	15	1%	7%
Total	206	1,155	230	1,591	100%	100%
Average Size	729	201	66	250	–	–

Source: Golf Australia Database

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



- The average club size in Australia is 250 members, with metropolitan clubs on average being more than three times greater in size than regionally located clubs.
- Approximately two thirds of clubs in Australia have less than 200 members, with 83% having less than 500 members.
- 73% of all clubs in Australia are located in a regional area.
- While clubs of over 1,000 members account for only 5% of all clubs across Australia, they account for 25% of individual members.
- There are 230 Social clubs affiliated to various state bodies. These clubs either typically have semi-permanent access rights to a public course facility (eg. Golf League Clubs (VGL) in Victoria) or are a club that utilise Golfink for handicapping purposes in the events they deliver to their members.

03 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Profile of Australian Clubs (cont)

The current size profile by state/territory for 2014 is outlined by general geographic in Table 2.

Table 2

Club Membership Size	NSW	VIC	QLD	SA	WA	TAS	NT	Total
Social Clubs	0	53	1	72	103	1	0	230
Golf Clubs								
<100	114	136	99	95	146	30	4	624
100-199	49	52	42	21	12	20	5	201
200-299	42	35	18	6	7	6	–	114
300-399	26	18	14	7	6	6	–	77
400-499	20	17	14	5	3	3	1	63
500-599	28	17	9	2	4	2	–	62
600-699	22	9	10	2	5	–	–	48
700-799	12	10	8	–	2	–	1	33
800-899	16	10	7	2	1	–	–	36
900-999	15	4	4	–	4	1	–	28
1000-1099	14	6	2	3	1	–	–	26
1100-1199	8	4	1	1	–	–	–	14
1200-1299	4	1	1	–	–	–	–	6
1300-1399	1	4	2	1	3	–	–	11
1400-1499	1	2	–	–	–	–	–	3
1500+	6	4	4	1	–	–	–	15
Total Golf Clubs	378	329	235	146	194	68	11	1,361
Avg. Golf Club Size	396	303	283	166	146	163	201	281

Source: Golf Australia Database

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

- NSW has the most number of golf clubs with 378, and the highest average member count with 396.
- Western Australia has the highest number of social clubs with 103.
- Western Australia has the lowest average golf club member count with 146.



03 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Club Playing Members

2014 National Total

For the 2014 period, national membership numbers across Australia were reported as 397,234 golfers. This result marked a 0.7% decline on numbers reported for the prior 12 month period, equating to 2,852 individual members. Three states experienced nett increases in membership numbers, namely Victoria, South Australia and Western Australia. Western Australia was the best performing state with a 2.2% increase in members. The other three states experienced small declines.

Table 3 summarises the national results recorded for 2014.

Table 3

State/Territory	2013	2014	Change	% Change
NSW	153,606	149,855	-3,751	-2.4%
VIC	107,365	107,996	631	0.6%
QLD	67,009	66,558	-451	-0.7%
SA	25,683	25,907	224	0.9%
WA	32,837	33,571	734	2.2%
TAS	11,310	11,131	-179	-1.6%
NT	2,276	2,216	-60	-2.6%
Total	400,086	397,234	-2,852	-0.7%

Source: Golf Australia Database

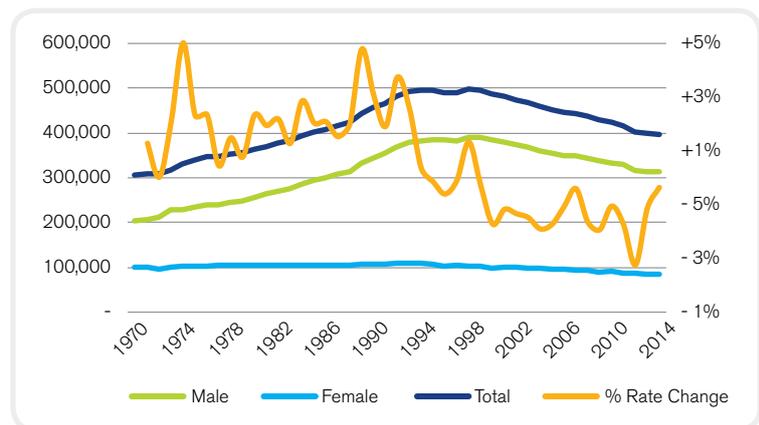
Note: comparative numbers from 2013 have been reset as a result of a small correction to WA numbers and no new numbers being available for Victoria.

Historical Trends

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 21%, averaging 1.4% per year. The annual reduction rate for male and female golfers over this period has been 1.4% and 1.5% respectively. In the past five years, the average annual rate of reduction has increased slightly to 1.6% per year (1.6% for males and 1.5% for females).

The long term membership picture (male, female and combined) is illustrated in Chart 1, along with the relevant annual percentage change. This annual percentage change, depicted by the orange line, indicates that there has been negative annual movement in membership numbers since 1999.

Chart 1



Source: Golf Australia Database

The overall 2014 outcome saw a continuation of the membership demand pattern generally evident over the prior three year period. A cumulative loss of 7.2% is evident in the past five years, averaging 1.9% per year. The only state to experience a nett increase in membership numbers over this period is Western Australia, with a 9.6% increase. The best performing state otherwise is Victoria, where membership numbers have declined by 4.9%.



-0.7%

Annual decline of 0.7% recorded in 2014, the lowest annual decline in membership reported since 2007

03 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Club Playing Members (cont)

Historical Trends (cont)

Table 4 summarises the national results recorded for the period 2010 to 2014.

Table 4

State / Territory		2010	2011	2012	2013	2014	5 Yr % Change
NSW	Members	166,844	163,032	156,982	153,606	149,855	-10.2%
	% Change		-2.3%	-3.7%	-2.2%	-2.4%	
VIC	Members	113,507	112,432	110,983	107,365	107,996	-4.9%
	% Change		-0.9%	-1.3%	-3.3%	0.6%	
QLD	Members	74,389	72,922	69,302	67,009	66,558	-10.5%
	% Change		-2.0%	-5.0%	-3.3%	-0.7%	
WA	Members	30,636	30,702	31,409	32,837	33,571	9.6%
	% Change		0.2%	2.3%	4.5%	2.2%	
SA	Members	27,647	27,140	26,228	25,683	25,907	-6.3%
	% Change		-1.8%	-3.4%	-2.1%	0.9%	
TAS	Members	12,612	12,148	11,847	11,310	11,131	-11.7%
	% Change		-3.7%	-2.5%	-4.5%	-1.6%	
NT	Members	2,486	2,369	2,293	2,276	2,216	-10.9%
	% Change		-4.7%	-3.2%	-0.7%	-2.6%	
Total	Members	428,121	420,745	409,044	400,086	397,234	-7.2%
	% Change		-1.7%	-2.8%	-2.2%	-0.7%	

Source: Golf Australia Database



03 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Club Playing Members (cont)

Results by Geographic Area

When assessed on a regional basis, it is apparent that the positive membership growth recorded in Western Australia and Victoria was driven by outcomes achieved in its metropolitan market, with 3.5% and 1.7% increases respectively. Significant declines are apparent in other metropolitan markets, namely New South Wales and Queensland. Other metropolitan markets are relatively stable.

With respect to regional areas, South Australia was the best performing state with a 1.1% increase while New South Wales, Tasmania and the Northern Territory all experienced declines in excess of 1%.

The results for each state/territory for metropolitan and regional areas are represented in Table 5.

State / Territory	Metropolitan			Regional		
	2013	2014	% Change	2013	2014	% Change
NSW	65,599	63,515	-3.2%	88,007	86,340	-1.9%
VIC	47,521	48,344	1.7%	59,844	59,652	-0.3%
QLD	15,604	14,896	-4.5%	51,405	51,662	0.5%
SA	14,722	14,829	0.7%	10,961	11,078	1.1%
WA	20,985	21,711	3.5%	11,852	11,860	0.1%
TAS	2,170	2,196	1.2%	9,140	8,935	-2.2%
NT	-	-	-	2,276	2,216	-2.6%
Total	166,601	165,491	-0.7%	233,485	231,743	-0.7%

Source: Golf Australia Database

Results by Gender

When assessed by gender, positive male and female membership growth was recorded in Western Australia. By comparison, New South Wales, Tasmania and the Northern Territory all experienced negative movement for both male and female membership. The overall decline for male membership was 0.5% for the year, and 1.4% for females, as summarised in Table 6.

State / Territory	Men			Women		
	2013	2014	% Change	2013	2014	% Change
NSW	122,576	119,669	-2.4%	31,030	30,186	-2.7%
VIC	82,627	83,891	1.5%	24,738	24,105	-2.6%
QLD	54,098	53,403	-1.3%	12,911	13,155	1.9%
SA	20,577	20,816	1.2%	5,106	5,091	-0.3%
WA	25,701	26,269	2.2%	7,136	7,302	2.3%
TAS	9,280	9,153	-1.4%	2,030	1,978	-2.6%
NT	1,898	1,850	-2.5%	378	366	-3.2%
Total	316,757	315,051	-0.5%	83,329	82,183	-1.4%

Source: Golf Australia Database

03 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Club Playing Members (cont)

Results by Gender (cont)

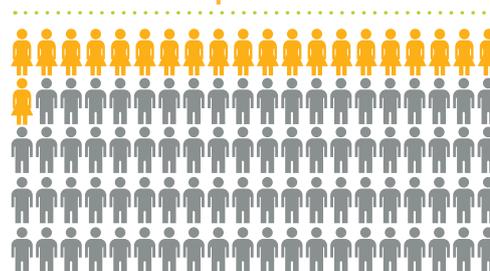
On a national basis, female members account for 21% of the total membership base. The gender mix evident by state/territory for the 2014 year, as summarised in Table 7, shows some variation between states/territories. Victoria has the highest percentage of female members while the lowest is in the Northern Territory. Little movement in these percentages has been evident from the previous year. A summary of the gender mix which is evident by state/territory is below.

Chart 2



21%

female share of membership base



Source: Golf Australia Database

Level of Movement

44% of clubs with at least 100 members experienced a nett increase in membership numbers for 2014, compared to 51% of clubs that experienced a nett decrease in numbers. Table 7 summarizes the number of clubs that have experienced positive and negative shifts in their membership base for each size category, and the scale of such shifts.

Table 7

Club Size	- >10%	- 5% to 10%	- 1% to 4%	0%	+ 1% to 5%	+5% to 10%	+ >10%
100-249	16%	19%	16%	5%	16%	8%	21%
250-499	18%	12%	19%	4%	20%	12%	15%
500-749	20%	15%	23%	5%	13%	6%	17%
750-999	8%	17%	24%	10%	15%	12%	14%
1,000+	4%	12%	26%	11%	21%	14%	12%
Total	15%	15%	20%	6%	17%	10%	17%
		50%		6%		44%	

Source: Golf Australia Database

03 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

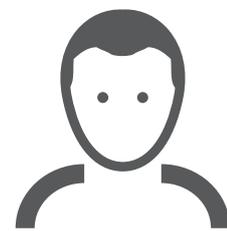
Playing Member Age Profile

Average Age

The average age of club members across the country is just over 55 years, with some variation evident across different states/territories. The state/territory with the youngest average member is the Northern Territory at 47½ years, while the average member age of other states/territories range from 53½ years (WA) to just under 56 years (SA). This table also reveals a significant age disparity between male and female members, with the average female member across all states/territories being nine years older than the average male member. Full results of the age breakdown for male and female club members by states/territory are depicted in Table 8.

Table 8

State/Terr.	Male	Female	Total
NSW	54.1	62.9	55.7
VIC	53.7	63.1	55.6
QLD	52.8	61.0	54.2
SA	54.1	63.1	55.8
WA	51.9	59.7	53.4
TAS	53.1	62.4	54.6
NT	46.8	52.2	47.6
Total	53.4	62.2	55.1



53.4 yrs



62.2 yrs

Average age of male and female members is 53.4 years and 62.2 years respectively



03 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Playing Member Age Profile (cont)

Age Distribution

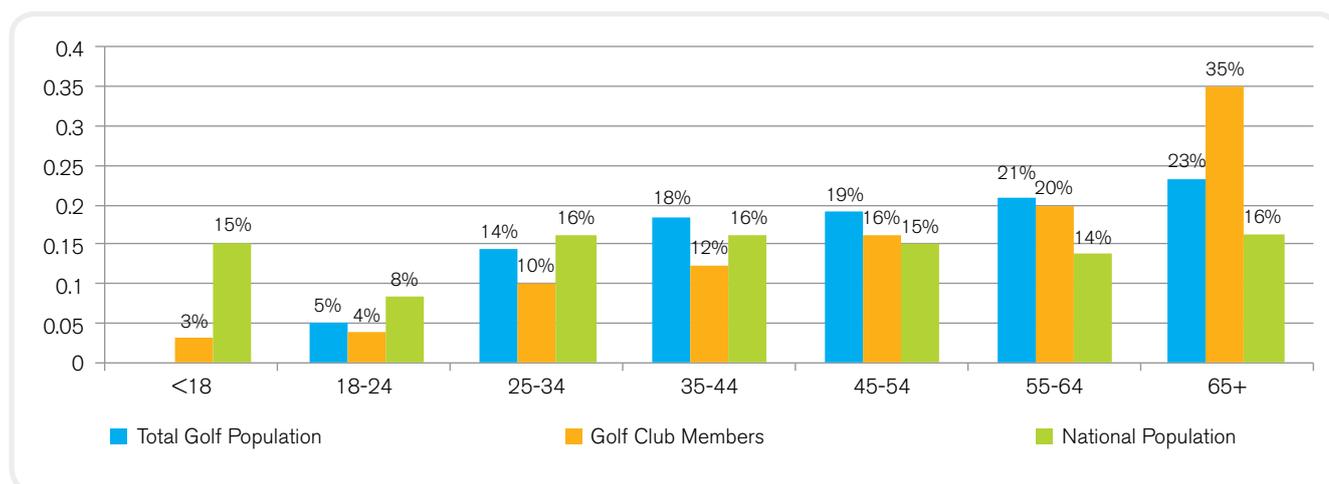
55% of the national club golf membership base is aged 55 years or greater, with the average and median age of the golf member population being 55 and 57 years respectively. By comparison, the median age of the national population is 37 years. The relative breakdown of club members by age bracket for each state/territory is depicted in Table 10.

Table 9

Age Bracket	NSW	VIC	QLD	SA	WA	TAS	NT	Total
<18	2%	3%	3%	4%	5%	3%	3%	3%
18-24	4%	3%	4%	3%	4%	5%	4%	4%
25-34	10%	9%	11%	9%	9%	8%	17%	10%
35-44	12%	12%	13%	11%	11%	11%	17%	12%
45-54	16%	16%	17%	16%	18%	16%	21%	16%
55-64	20%	21%	19%	20%	22%	22%	22%	20%
65+	36%	36%	33%	37%	31%	34%	16%	35%

The age profile of club golfers with comparison to the wider Australian population base and total golf population is depicted in Chart 3. This demonstrates an older age profile of golf club members compared to all golfers and the national population.

Chart 3



Source: ASC, Golf Australia Database, Golfink, ABS Cat. 3235.0

03 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Playing Member Age Profile (cont)

Junior Members

Reported junior members (under the age of 18) account for 3.6% of total members across the nation. This proportion is higher for males than females, with 4% of male members being juniors while 2.3% of female members are juniors. There is some variation across different states, with a higher proportion of junior members evident in New South Wales (4.1%) and Victoria (4.0%). South Australia reported the lowest proportion of junior members, with 2.2% members. A summary of junior membership is found in Table 10.

Table 10

State/Territory	Male Junior		Female Junior		Total Juniors	
	2014	% of Males	2014	% of Females	2014	% of Total
NSW	5,353	4.5%	739	2.4%	6,092	4.1%
VIC	3,747	4.5%	523	2.2%	4,270	4.0%
QLD	1,731	3.2%	329	2.5%	2,060	3.1%
WA	699	3.4%	121	2.4%	820	3.2%
SA	628	2.4%	120	1.6%	748	2.2%
TAS	336	3.7%	33	1.7%	369	3.3%
NT	59	3.2%	23	6.3%	82	3.7%
Total	12,553	4.0%	1,888	2.3%	14,441	3.6%

NB: As Victoria does not collate membership number for male juniors, the relative percentage of male juniors from NSW is applied to Victoria's total male membership figure to arrive at a junior male figure.



03 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Attraction & Attrition Rates

Utilising data from GolfLink, GA is for the first time able to report annual national club attraction & attrition rates. With national 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 stated year-end numbers from the state body annual reports, these rates can be accurately calculated.

Table 11 depicts the movement in members on a state/territory basis, showing the relevant attraction and attrition rates that apply.

Table 11

State / Territory	2013	New Members	Attraction Rate	Attrition Rate	Resigned Members	Actual Change	% Change	2014
NSW	153,606	16,064	10.5%	12.9%	19,815	-3,751	-2.4%	149,855
VIC	107,365	12,656	11.8%	11.2%	12,025	631	0.6%	107,996
QLD	67,009	8,863	13.2%	13.9%	9,314	-451	-0.7%	66,558
SA	25,683	3,460	13.5%	12.6%	3,236	224	0.9%	25,907
WA	32,837	4,083	12.4%	10.2%	3,349	734	2.2%	33,571
TAS	11,310	1,404	12.4%	14.0%	1,583	-179	-1.6%	11,131
NT	2,276	343	15.1%	17.7%	403	-60	-2.6%	2,216
Total	400,086	47,159	11.8%	12.5%	50,011	-2,852	-0.7%	397,234

NB: As Victoria does not collate membership number for male juniors, the relative percentage of male juniors from NSW is applied to Victoria's total male membership figure to arrive at a junior male figure.

Tables 12 and 13 below depict attrition rates only, by state/territory and by club size.

Table 12

State/Territory	Metro	Regional	Overall
NSW	11.9%	13.7%	12.9%
VIC	8.4%	13.2%	11.2%
QLD	14.0%	13.9%	13.9%
WA	8.0%	14.1%	10.2%
SA	11.2%	14.3%	12.6%
TAS	7.8%	15.3%	14.0%
NT		17.7%	17.7%
National	10.7%	13.8%	12.5%

Table 13

Club Size	Metro	Regional	Overall
<250	31.3%	19.9%	20.5%
250-499	14.6%	14.5%	14.5%
500-749	16.7%	12.6%	14.1%
750-999	9.3%	8.3%	8.9%
1,000+	6.7%	6.3%	6.5%
National	10.7%	13.8%	12.5%

Key observations noted from these tables include:

- The national attraction and attrition rates are 11.7% and 12.5% respectively.
- The three states with the lowest attrition rates, Western Australia (10.2%), Victoria (11.2%) and South Australia (12.6%) are the three states which experienced positive membership growth.
- Attrition rates vary significantly by club size and by region. Smaller clubs naturally have higher attrition rates than larger clubs due to their lower membership base.



03 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

New Member Profile

Outlined earlier in this report is the level of new demand recorded in 2014, approximately 12% of total golf club membership. With data sourced from Golfink, the age profile of new members is depicted in Chart 4 and the gender profile in Chart 5.

Chart 4 indicates that there is a younger age profile evident in new members than the wider total membership base. Specifically, 38% of new members are aged between 25 and 44.

With regard to gender, the new member profile indicates a higher proportion of male members than club members generally with 83% male and 17% female. This compares to a 79%/21% gender mix for all club members. Chart 5 indicates that 42% of new male members are aged 25-44 while for females, 53% are aged 55+.

Chart 4

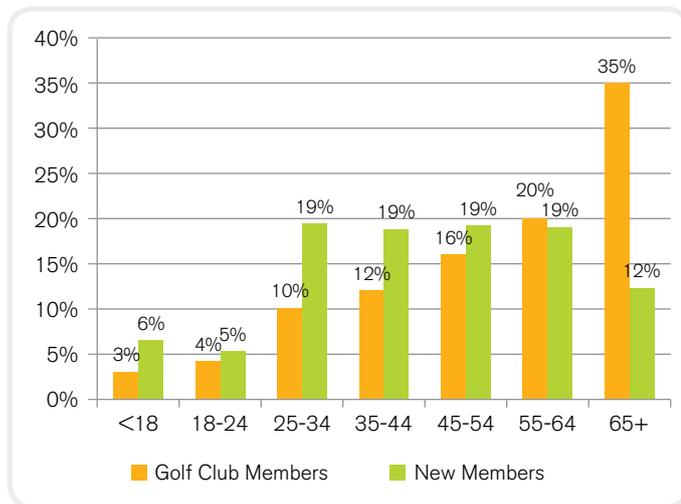
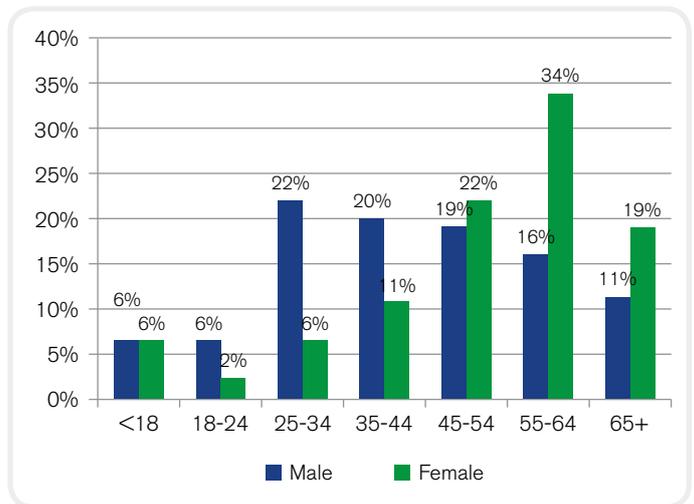


Chart 5



57%

of new members in 2014 are aged between **25 and 54 years** compared to **38%** of existing members.

04 STATE MEMBERSHIP OUTCOMES

Introduction

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 in this area.

NSW

NSW combined, with a 3,751 or 2.4% decline in club membership numbers, contributed 117% of the overall national decline in membership for the year. Since 2010,

Eight of the 21 districts in NSW experienced a nett increase in membership numbers as follows:

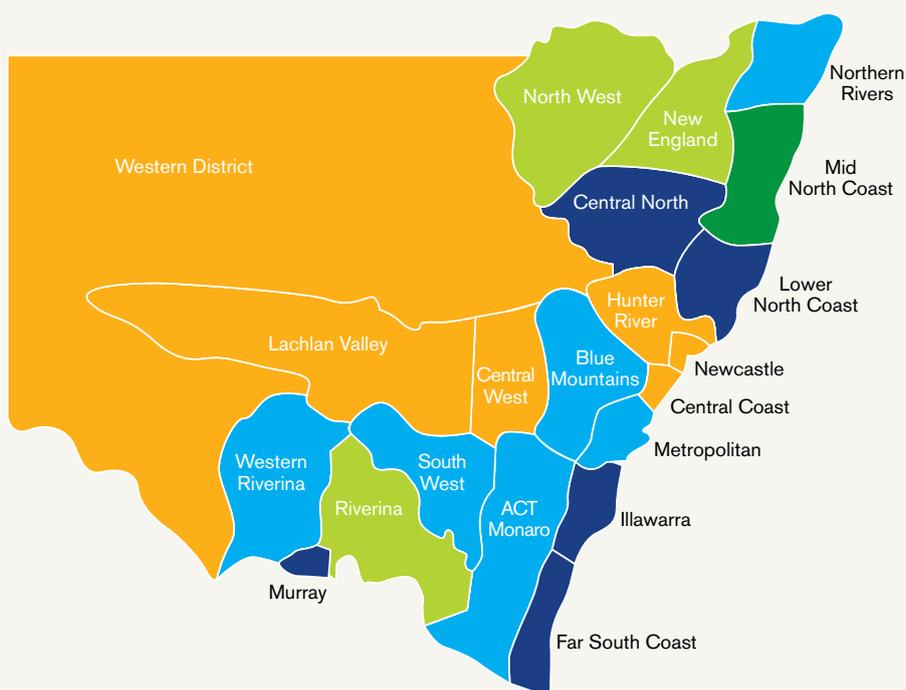
- **Murray** - 323 members, representing a 7% increase
- **Mid North Coast** – 338 members, representing a 6% increase
- **Riverina** – 67 members, representing a 6% increase
- **North-West, New England, Lachlan Valley, Western and Central-Western** districts all achieved modest increases

The remaining 13 districts all experienced a reduction in membership numbers. This includes the metropolitan area, which experienced a decrease in membership numbers of 2,084, representing 3.2%. Details are as follows:

- **Lower North Coast** – 474 members, representing a 9% decline
- **Central North** – 150 members, representing a 5% decline
- **Far South Coast** – 298 members, representing a 5% decline
- **Illawarra** – 5.3 members, representing a 5% decline
- **Northern Rivers** – 345 members, representing a 4% decline
- **Blue Mountains** – 111 members, representing a 4% decline
- **The Hunter River, Brisbane Water, Newcastle ACT-Monaro, Western Riverina, and South-West regions** all experienced small declines

% Change in membership numbers from 2013 to 2014:

- Greater than -5% change
- -2% to -5% change
- -2 to +2% change
- +2 to +5% change
- Greater than +5% change



04 STATE MEMBERSHIP OUTCOMES (CONT)

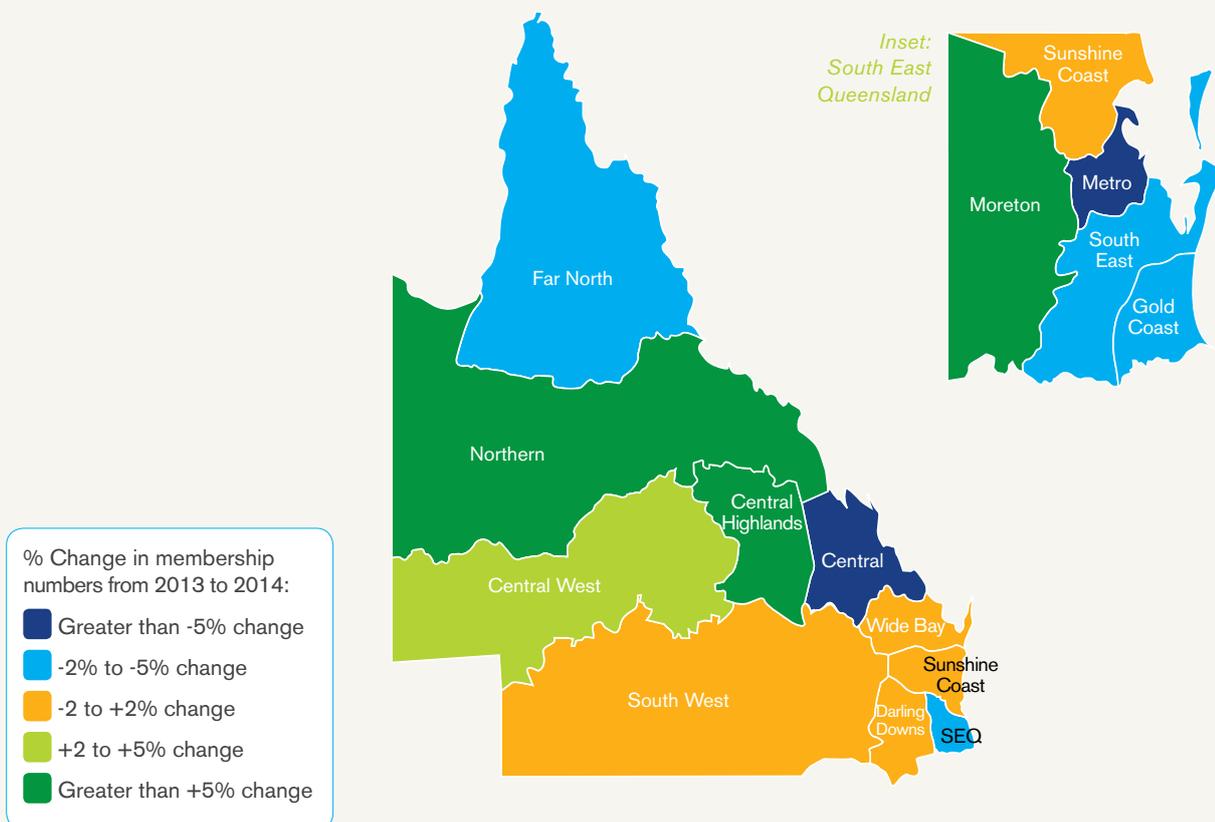
Queensland

The state of Queensland, with a decline of 805 or 1.2% in member numbers, contributed 25% of the overall national decline in membership for the year. Six of the 14 districts experienced a nett increase in membership numbers as follows:

- **North-West** – 63 members, representing a 29% increase
- **Central Highlands** – 293 members, representing a 29% increase
- **Moreton** – 398 members, representing a 24% increase
- **North Queensland** – 219 members, representing a 5% increase
- **Central West** and **Darling Downs** each experienced a small increase in numbers

The remaining eight regions all experienced a decline in membership numbers including the metropolitan region, where member numbers declined by 953 or 6%. Details of the decline experienced by other regions are as follows:

- **Central Queensland** – 205 members, representing a 6% decline
- **Far North Queensland** – 142 members, representing a 4% decline
- **South-East Queensland** – 170 members, representing a 4% decline
- **Gold Coast** – 277 members, representing a 2% decline
- **Wide Bay, South-West** and the **Sunshine Coast** all experienced a small decline in membership numbers



04 STATE MEMBERSHIP OUTCOMES (CONT)

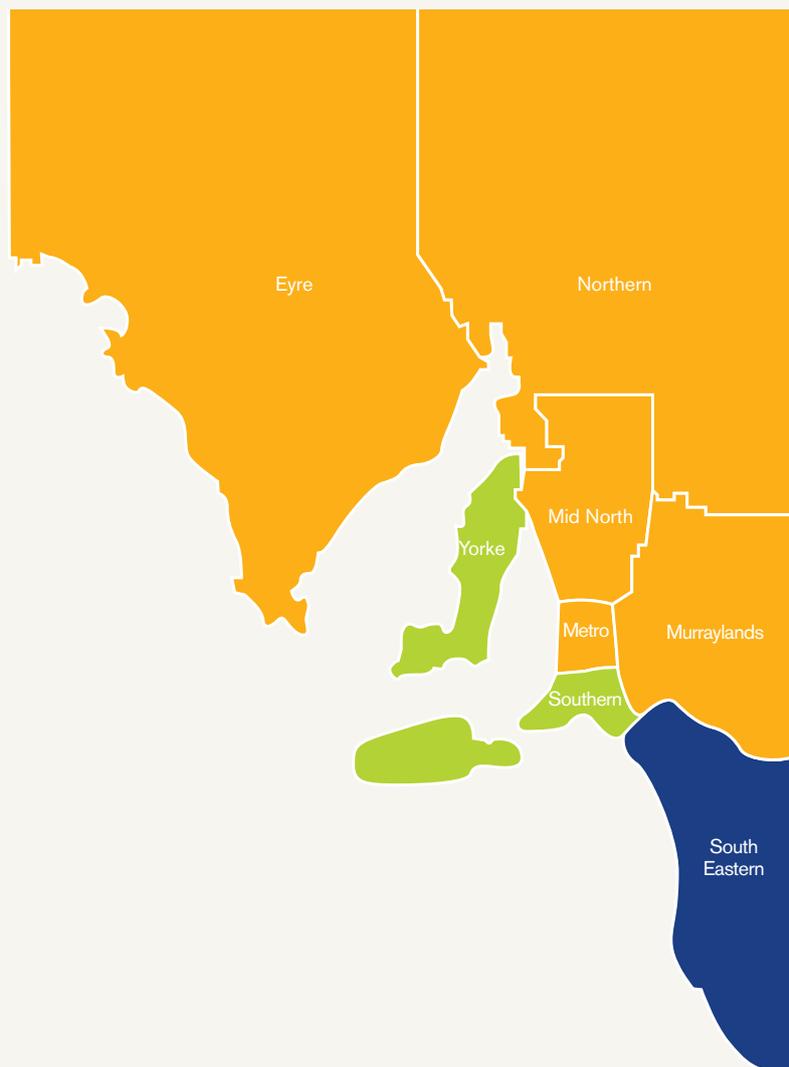
South Australia

The state of South Australia experienced an increase of 224 members, representing a 1% increase. Six of the nine districts experienced a nett increase in membership numbers including the metropolitan area with 1,182 additional members, representing a 9% increase. Other strong performing regions include;

- **Riverland** – 69 members, representing a 12.3% increase
- **Southern** – 126 members, representing a 3.7% increase

- **Yorke, Murraylands** and **Eyre** all experienced a small increase in member numbers

Of the remaining three regions, South Eastern experienced the largest decrease with 93 members, representing a 5% decrease. The Mid-North and Northern districts experienced declines on 1% (19 members) and 1% (4 members) respectively.



% Change in membership numbers from 2013 to 2014:

- Greater than -5% change
- -2% to -5% change
- -2 to +2% change
- +2 to +5% change
- Greater than +5% change

04 STATE MEMBERSHIP OUTCOMES (CONT)

Victoria

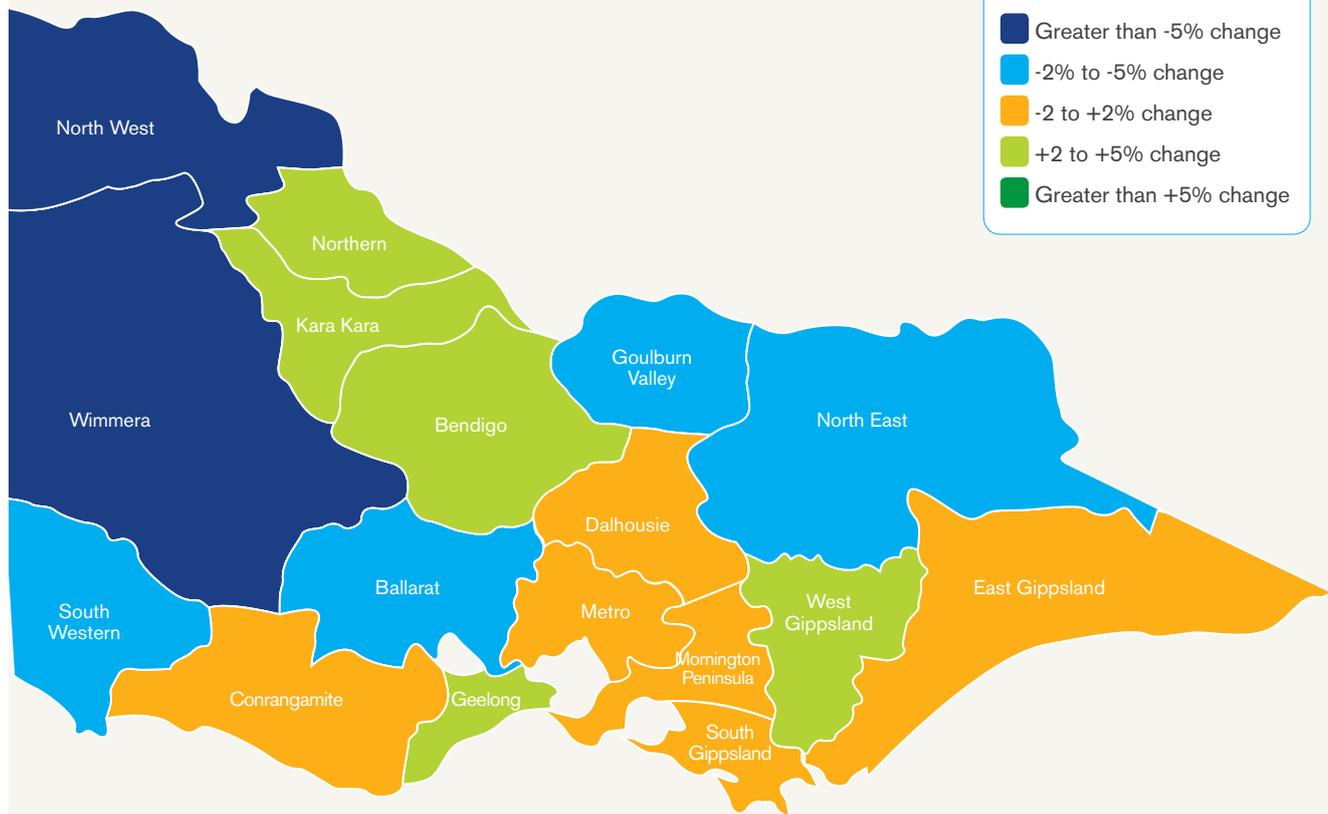
The state of Victoria experienced a 0.6% increase in club membership numbers, with a nett increase of 631 members. This result was driven by the metropolitan region, which had the highest increase in actual numbers with 823 members. This equates to a 2% increase. Other the remaining 16 districts, seven experienced increases as follows:

- **West Gippsland** – 131 members, representing a 4% increase
- **Geelong** – 240 members, representing a 2% increase
- **Mornington Peninsula** – 147 members, representing a 1.4% increase

- **Kara Kara, Northern District** and **Corangamite** all experienced small increases

The remaining eight districts all experienced declines as follows:

- **North-West** – 220 members, representing a decline of 11%
- **Wimmera** – 120 members, representing a decline of 5%
- **South Western, North East, Ballarat, Goulburn Valley, South Goulburn, East Gippsland** and **Dalhousie** all experienced small declines



04 STATE MEMBERSHIP OUTCOMES (CONT)

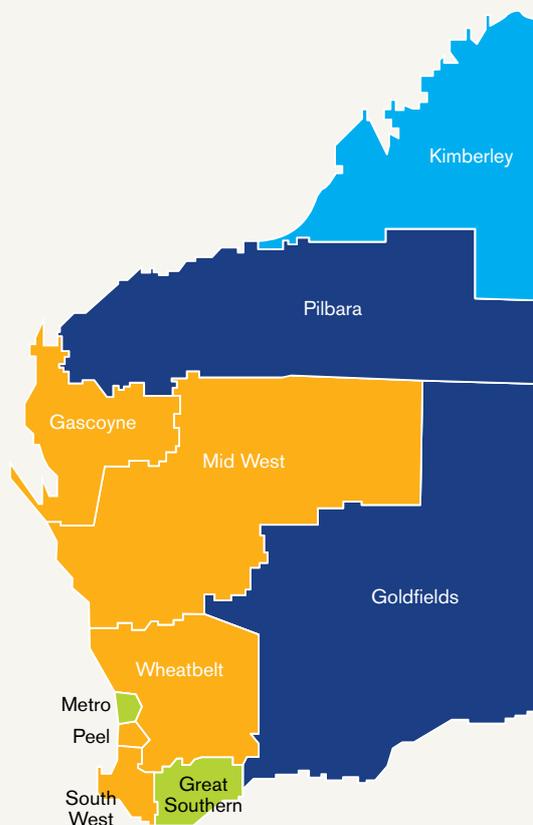
Tasmania

The state of Tasmania, with a 1.6% decline in club membership numbers, contributed 6% of the overall national decline in membership for the year. Three of the four golf districts recorded declining demand, with the exception being the Southern Metropolitan district which recorded an increase of 1% of 26 members. The North district (93 members or 4%), Southern district (70 members or 2%) and the North district (42 members 1%) all experienced small declines.



Western Australia

The state of Western Australia was the strongest performing, recording a 2.2% increase in numbers with an additional 734 members. This result was driven by strong demand in the metropolitan region which grew by 3.5%, equating to an additional 726 members. Of the nine other regions, five experienced a small increase membership numbers. Those regions were the Great Southern, South-West, Gascoyne, Peel and Wheatbelt regions. The remaining four regions, Kimberley, Goldfields, Pilbara and the Mid-West, all experienced small declines.



% Change in membership numbers from 2013 to 2014:

- Greater than -5% change
- 2% to -5% change
- 2 to +2% change
- +2 to +5% change
- Greater than +5% change

05 GOLF ROUNDS

National Results

For the twelve month period to end December 2014 approximately 14.3 million rounds were recorded by GolfLink across the same facility base, a 7.2% increase over calendar year 2013. On a year-end basis, slightly higher growth was recorded in rounds played by male golfers, accounting for 82% of all rounds played, as summarised in Table 14.

Table 14

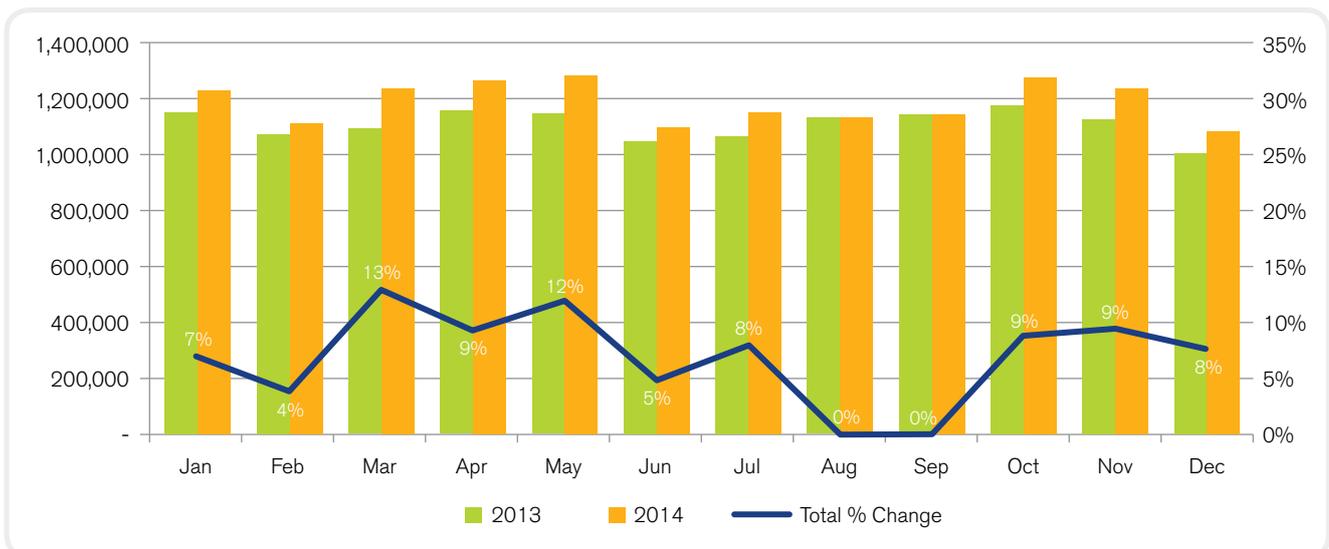
	2013	2014	% Change
Male	10,898,945	11,709,938	+7.4%
Female	2,441,871	2,592,373	+6.2%
Total	13,340,816	14,302,311	+7.2%
% male share	82%	82%	

Source: GolfLink, Golf Australia, GBAS

Male and female competition rounds in 2014 grew by 7.4% and 6.2% respectively.

Month over month competition rounds growth was achieved for all months of the year through to November, as illustrated in Chart 6.

Chart 6



Source: GolfLink, Golf Australia, GBAS

05 GOLF ROUNDS (CONT)

Results by State/Territory

With a generally drier continent, particularly in the key population centres, growth was evident across all states/territories through 2014. Queensland experienced the largest increase in rounds played for the year, recording approximately 13% growth over 2013, largely due to an exceptional strong 1st quarter. Victoria and South Australia were the only other two states to record growth in all four quarters of the year.

Rounds played by state/territory for the each quarter of 2014 and the movement recorded over the corresponding period in 2013 are summarised in Table 15.

Table 15

2014	Jan – Mar	April – June	July – Sept	Oct – Dec	Total
NSW	1,353,095	1,368,143	1,277,650	1,367,409	5,366,297
VIC	994,855	942,282	874,896	971,098	3,783,131
QLD	631,402	683,804	665,803	609,044	2,590,053
WA	272,429	269,175	268,599	277,590	1,087,793
SA	260,976	288,947	253,821	263,701	1,067,445
TAS	90,459	84,376	71,994	95,379	342,208
NT	13,096	17,546	19,289	15,453	65,384
Total	3,616,312	3,654,273	3,432,052	3,599,674	14,302,311
% change over PY					
NSW	+9.9%	+12.8%	(2.5%)	+6.0%	+6.4%
VIC	+1.6%	+3.3%	+6.7%	+13.2%	+6.0%
QLD	+29.8%	+15.3%	+4.6%	+5.0%	+12.8%
WA	+3.8%	(6.8%)	+1.0%	+8.2%	+1.3%
SA	+2.4%	+14.6%	+11.1%	+12.1%	+10.0%
TAS	(3.7%)	(0.9%)	+6.6%	+20.5%	+5.0%
NT	(8.5%)	+2.6%	+15.9%	+16.8%	+6.7%
Total	+8.9%	+8.7%	+2.6%	+8.7%	+7.2%

Source: GolfLink, Golf Australia, GBAS



05 GOLF ROUNDS (CONT)

Results by Capital City

The national result of a 7.2% increase was reasonably consistent across the metropolitan and regional market, with 6.2% and 8.0% rounds growth respectively recorded for these markets. Consistent with the wider Queensland result, the Brisbane market, accounting for approximately one quarter of all rounds played in the state, generated double digit gains. All other markets approximated the metropolitan average.

Table 16

2014	Jan - Mar	April - June	July - Sept	Oct - Dec	Total
Sydney	620,615	616,997	566,195	628,923	2,432,730
Melbourne	486,503	455,360	433,517	472,321	1,847,701
Brisbane	140,529	147,195	142,586	130,889	561,199
Perth	173,845	190,760	160,789	177,574	702,968
Adelaide	175,149	159,184	142,251	174,295	650,879
Total	1,596,641	1,569,496	1,445,338	1,584,002	6,195,477

% change over PY

Sydney	+8.5%	+15.2%	(5.7%)	+8.2%	+6.2%
Melbourne	(0.6%)	+1.7%	+6.5%	+10.4%	+4.3%
Brisbane	+34.3%	+17.8%	+5.3%	+5.5%	+14.7%
Perth	+1.3%	+9.3%	+1.9%	+6.4%	+4.8%
Adelaide	+5.7%	+4.5%	+2.4%	+12.8%	+6.4%
Total	+6.2%	+9.4%	+0.4%	+8.9%	+6.2%

2014	Jan-Mar	Apr - Jun	Jul - Sep	Oct - Dec	Total
Total Metro	1,596,641	1,559,496	1,445,338	1,584,002	6,195,477
Total Regional	2,019,671	2,084,777	1,986,714	2,015,672	8,106,834
Total	3,616,312	3,644,273	3,432,052	3,599,674	14,302,311

% change over PY

Total Metro	+6.2%	+9.4%	+0.4%	+8.9%	+6.2%
Total Regional	+11.1%	+8.3%	+4.2%	+8.5%	+8.0%
Total	+8.9%	+8.7%	+2.6%	+8.7%	+7.2%

Source: GolfLink, Golf Australia, GBAS



+6.2% metropolitan



+8.0% regional

Competition rounds in metropolitan and regional areas grew by 6.2% and 8.0% in 2014

06 PROGRAMS, EVENTS, DELIVERERS & OFFICIALS

Table 17 summarises a number of key participation areas that are measured by Golf Australia as a requirement to report to the Australian Sports Commission.

Table 17

Program Participants	2012-13	2013-14
MyGolf National Junior Program	4,846	939
PumpGolf Shootout	1,674	N/A
Other Non-MYGolf Junior Programs	8,974	12,577
Crown Lager Social/GA Social Golf Club	2,478	2,898
Other Casual Golf Programs	7,550	7,027
Indigenous	2,513	1,458
Disability	1,549	2,224
Female	15,005	12,536
Seniors	13,213	14,063
Other programs	1,004	2,576
Total	58,806	56,298
Event Entries (Men/Women/Mixed/Jnrs)		
Member Association State & Territory Events	56,575	50,894
Junior Foundation Events	7,447	7,696
Golf Australia National Events	1,724	1,665
PGA Events	96,748	93,829
ALPG Events	791	959
Total	163,285	155,043
School Delivered Programs Participants		
MYGolf Schools 1 (primary) program	45,936	56,499
MYGolf Schools 1 (primary) "tasters"	47,556	36,781
AASC Golf Program	13,820	16,035
MYGolf Schools 2 (secondary) program	24,854	22,748
MYGolf Schools 2 (secondary) "tasters"	2,312	1,518
Other Non-MYGolf School Programs	5,687	7,991
Total	140,165	141,572
School Managed Competitions Participants		
SSA 12 Yrs & Under Championship	2,401	3,698
SSA 19 Yrs & Under Championship	1,014	1,639
Total	3,415	5,337
Program Deliverers & Officials		
Development Personnel	33	34
Community Golf Leaders & Coaches	1,383	1,728
AASC Golf Coaches	678	502
PGA Coaches	1,615	1,562
ALPG Coaches	57	57
Rules Officials	4,886	4,796
Course Raters	418	248
Total	9,070	8,927

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.



Points to note from table 17 include;

1. MyGolf National Junior Program

- 2013/14 data reflects new participants only for the 2013/14 period whereby 2012/13 data reflects an accumulative total since 2010/11.
- MyGolf participant data from now on is to be reported to reflect new participants only.

2. PumpGolf Shootout

- Event ceased in 2013/14 with review of MyGolf program and establishment of GA and PGA joint junior venture agreement.

3. Member Association State & Territory Event Participants

- Victoria & NSW reported event participant declines of 1,293 and 3,656 respectively.

4. MyGolf School Participants

- Program participants up due to shift away from "taster" programs (which has declined) and now greater focus on 5 week programs.

5. Course Raters down due to completion of course rating exercise.

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