



2017

Golf Club Participation Report

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01 KEY FINDINGS

A SNAPSHOT OF THE 2017 GOLF CLUB PARTICIPATION REPORT

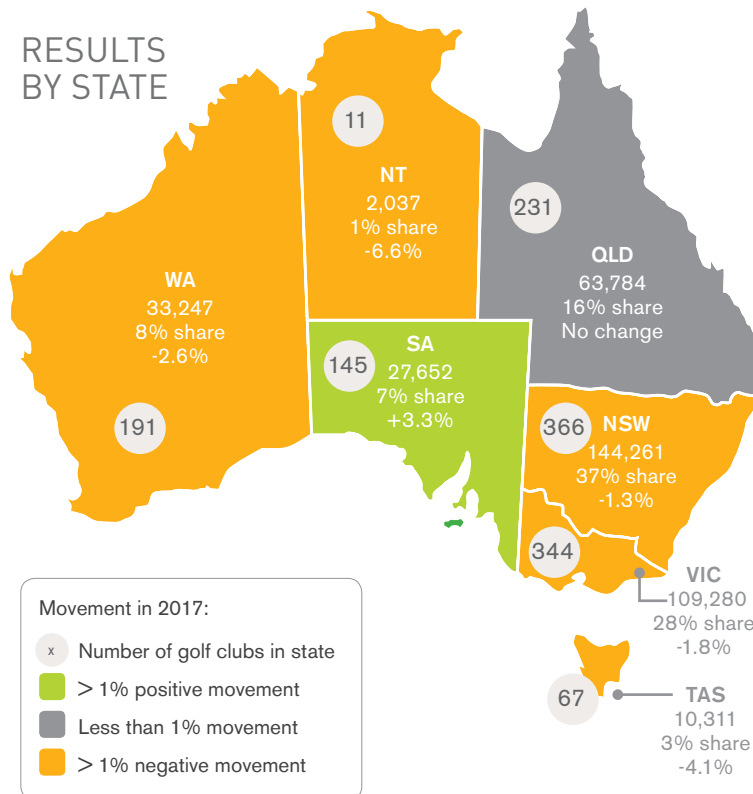
TOTAL CLUB MEMBERS

 389,672

 1.1% decline from 2016

 Average annual decline 0.7% over past 5 years

RESULTS BY STATE



56yrs



64yrs

Average age of male and female members is 56.1 years and 64.1 years respectively

20% female share of membership base

NATIONAL ATTRITION RATE 6.9%

PARTICIPATION RATE: MEMBERS AS % OF POPULATION

OVERALL:

1.6%

METROPOLITAN: REGIONAL:
1.0% 2.2%

Clubs experiencing growth:


37%

of course-based clubs grew member numbers by >2% in 2017


METROPOLITAN CLUB MEMBERS

 150,691 across 205 clubs


 39% of members

 1.1% decline from 2016

REGIONAL CLUB MEMBERS

 216,693 across 1,130 clubs


 56% of members

 1.5% decline from 2016

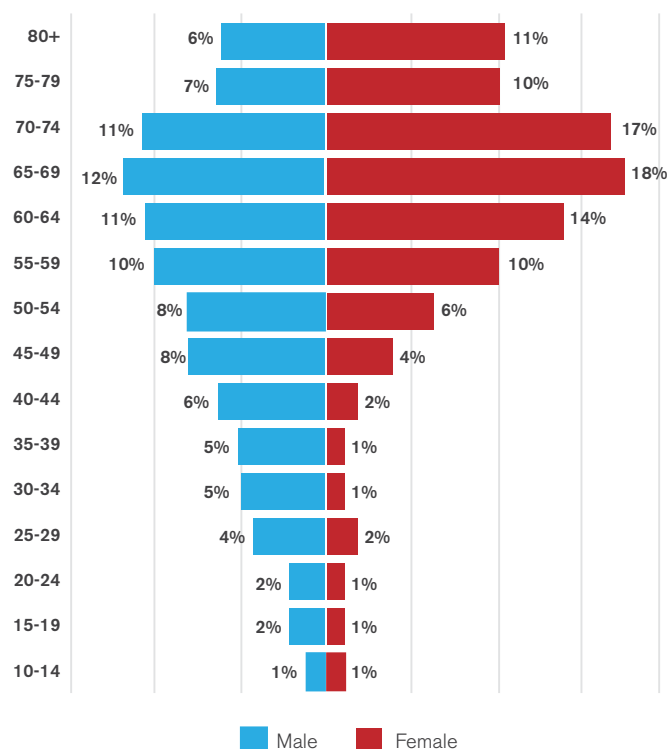
SOCIAL CLUB MEMBERS

 22,298 members across 321 clubs

 5% of members

 3.3% increase from 2016

AGE DISTRIBUTION BY GENDER



02 REPORT BACKGROUND



Introduction

Golf Australia is pleased to present to you the **2017 Golf 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 5th 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 four participation reports for Golf Australia, along with a number of other leading industry reference reports in Australia and overseas covering topics such 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



03 BROADER GOLF PARTICIPATION TRENDS

Introduction

In 2016 the Australian Sports Commission (ASC) re-started its reporting on sports participation in Australia. Titled AusPlay, this new, and now to be annual, release of annual participation data enables the sport to better understand and measure the ongoing trend in broader participation numbers in the sport.

Prior to this new report, the sport previously sought national participation guidance from the ASC's annual Exercise, Recreation & Sport Surveys (ERASS), these reports published from 2000 through to 2011. Whilst a slightly different methodology was used in the Ausplay research, in order to create some guidance as to the longer-term trend in overall participation in golf and in the absence of other reliable reference points, results from the ERASS reports from 2004 to 2010, and the two new data sets from the first two AusPlay reports published in 2017 and 2018 have been combined to create a long-term view of the historical participation trends in golf.

AusPlay Sport Participation

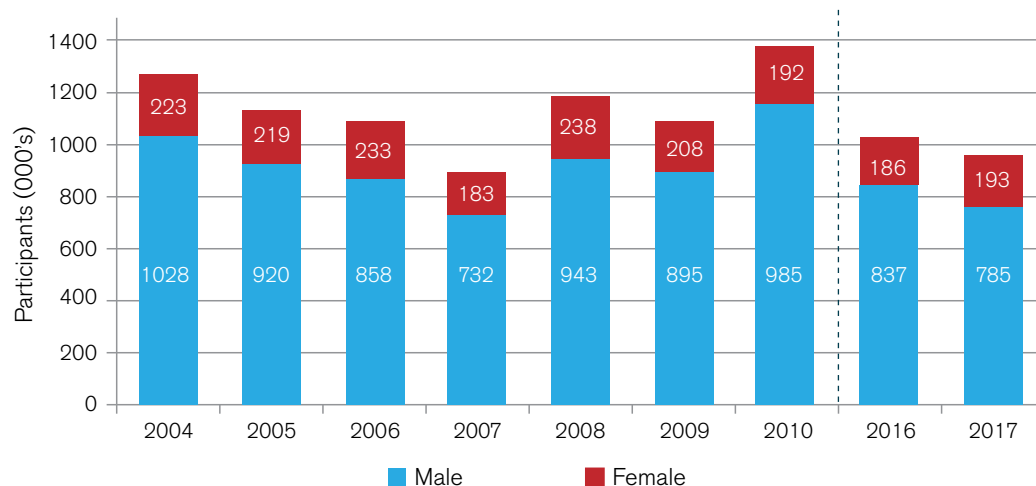
Released in April 2018, data from Ausplay 2017 indicates a total of 980,000 people, or approximately 5% of the population, participated in golf in the 12-month period. This result is slightly under that reported in 2016 (1.022m) and indicates a fall of approximately 4% over the prior year. Over the longer term this result contributes to an average annual decline of 1.9% per year in total participation numbers since 2004.

For the annual period other key outcomes included:

- A 6% decline in male participation numbers, representing an average annual decline of 2% since 2004.
- A 4% increase in female participation numbers, representing an average annual decline of 1% since 2004
- Males account for 80% of all golfers, steady over the period.

The annual results by gender are illustrated below in Chart 1.

Chart 1 - Annual golf participants by gender



Source: ERASS, AusPlay

03 BROADER GOLF PARTICIPATION TRENDS (CONT)

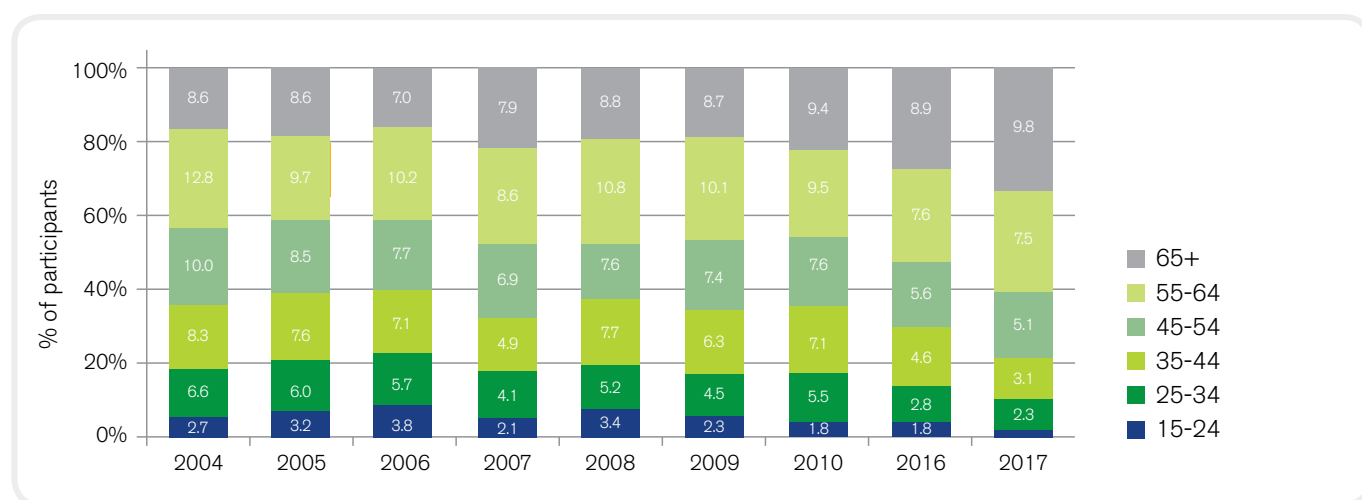
Assessment of the AusPlay results by age cohort reveals a continuation of the trend that first began to emerge in 2007. This trend is a continuing increase in the number of participants in the age cohorts over 55 years, and a decline in the age cohorts younger than 55 years.

Specific findings for 2017 include:

- The 25 to 44 year age cohort now accounts for 20% of total golfers, down from 30% ten years ago.
- The size of the age cohort 35-44 years has halved since 2010, now accounting for 11% of total demand.
- The 65 year plus age cohort has increased to 38% of total golf demand, doubling since 2008.

The annual results by age cohort are illustrated in Chart 2.

Chart 2 – Annual golf participation rate percentage by age cohort



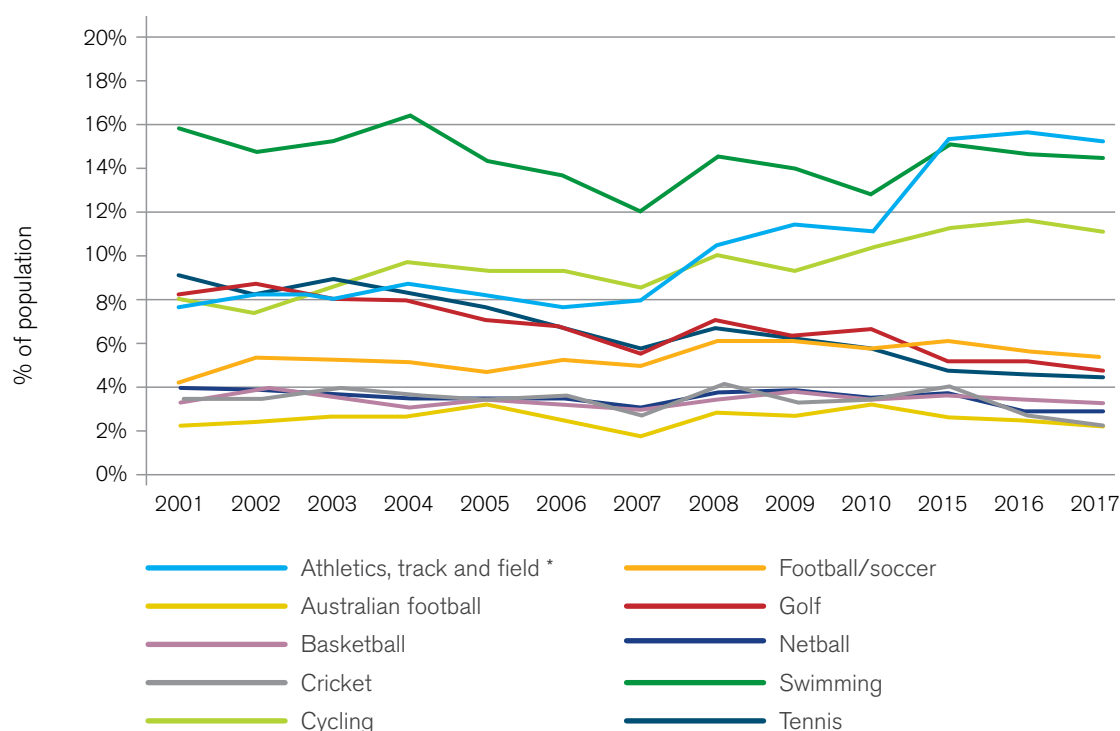
Source: ERASS, AusPlay

03 BROADER GOLF PARTICIPATION TRENDS (CONT)

Overall Participation – Top 10 Sports

By utilising data from ERASS and AusPlay for the past two years, long term participation trends can be extracted for a number of major sports including golf. Comparing the outcomes achieved can provide further context to the trend seen within golf participation. Depicted in the chart below are the trends evident in the top 10 sports in terms of overall (defined here as 'at least annually') participation.

Chart 3 – Overall participation, top 10 sports



Source: ERASS, AusPlay

* Includes running and jogging

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

- Increases are generally more evident in non-structured sports while declines tend to be more evident in structured sports
- A material decline in golf participation is evident for golf both in absolute terms and relative to other sports
- Tennis has experienced a similar decline to golf over this period.
- Cycling, athletics, track & field and football/soccer have all seen increased participation over the period.

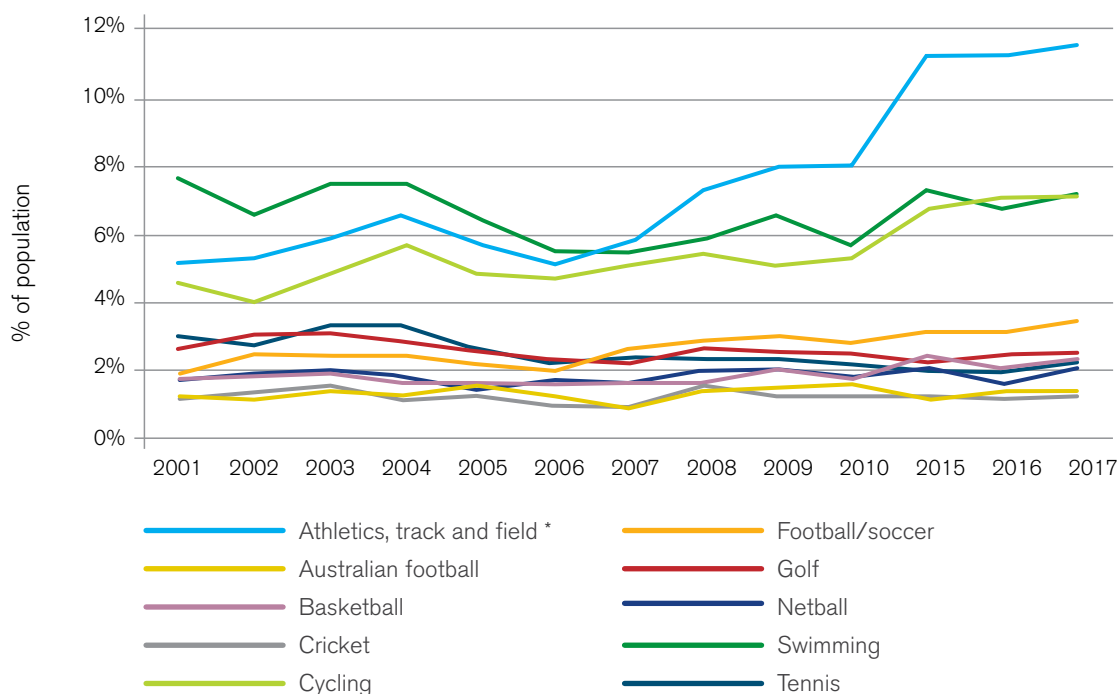
03 BROADER GOLF PARTICIPATION TRENDS (CONT)

Regular Participation – Top 10 Sports

While overall participation is a key measure, another key measure for golf is regular participation (**defined here as ‘at least weekly’**). When the long-term trend over this time period is measured in terms of regular participation, a different pattern for golf emerges.

Under this assessment, the data indicates that golf has performed more steadily over the period with a consistent regular participation rate of just under 3% of the population. This trend reflects the size of the core club member market and indicates that golf’s annual outcomes from a wider participation perspective are being impacted by the frequency of play (or not) of the less frequent golfer.

Chart 4 – Regular participation, top 10 sports



Source: ERASS, AusPlay

* Includes running and jogging

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

- The level of regular participation in the sports of cycling, athletics, track & field and football/soccer have all increased over the period.
- For most of the other top 10 sports, regular participation levels are generally flat.

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 Table 1.

Table 1

State	MGA Annual Report	Data Collected	Period
NSW/ACT *	2016/17	May 2017	Most recent completed financial year
VIC	Calendar Year 2017	December 2017	Most recent completed financial year
QLD	Calendar Year 2016	January 2017	Most recent completed financial year
SA	2016/17	December 2017	Point in time
WA	2016/17	December 2017	Point in time
TAS	Calendar Year 2017	June 2017	Point in time
NT	2016/17	December 2016	Point in time

**Throughout this report, New South Wales data will include the Australian Capital Territory.*



Given the different collection and reporting periods, the reported numbers for each state are not for the same comparable 12-month period. With data provided by individual club by gender for all national regions and clubs, the MGA reports however still remain the most accurate source of member data available. In order for annual trends to be determined, the most recently published (or to be published) state numbers have been aggregated and are classified as year ending 2017 numbers.



04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Profile of Australian Clubs

The current size profile of Australian golf clubs, based on the 1,656 clubs that reported playing membership numbers for 2017, is outlined by general geographic location and club size in Table 2.

Table 2

Club Membership Size	Metro	Regional	Social	Total	% Clubs	% Members
Less than 250	25	863	306	1,194	67%	19%
250 to 499	44	144	13	201	14%	19%
500 to 749	44	69	1	114	8%	19%
750 to 999	41	34	0	73	5%	17%
1,000+	51	20	1	74	5%	26%
Total	205	1,130	321	1,656	100%	100%
% of clubs	12%	68%	20%	100%		
Average size	735	195	67	238		

Source: State golf associations



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

- The average club size in Australia in 2017 is 238 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.
- 68% of all clubs in Australia are located in a regional area.
- While clubs of over 1,000 members account for 5% of all clubs across Australia, they account for 26% of individual members.
- There are 321 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. Golf League Clubs (VGL) in Victoria) or are a club that utilise Golfink 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 2017 is outlined in Table 3.

Table 3

Club Membership Size	NSW	VIC	QLD	WA	SA	TAS	NT	Total
Social clubs	0	117	1	127	75	1	0	321
Course-based clubs								
Less than 250	186	209	151	159	121	54	8	888
250 to 499	58	50	41	14	11	10	2	188
500 to 749	55	24	16	9	6	2	1	113
750 to 999	40	13	11	6	2	1	0	73
1,000 +	27	26	12	3	5	0	0	73
Total course-based clubs	366	344	231	191	145	67	11	1,335
Avg course-based club size	394	300	275	139	164	153	185	

Source: State golf associations

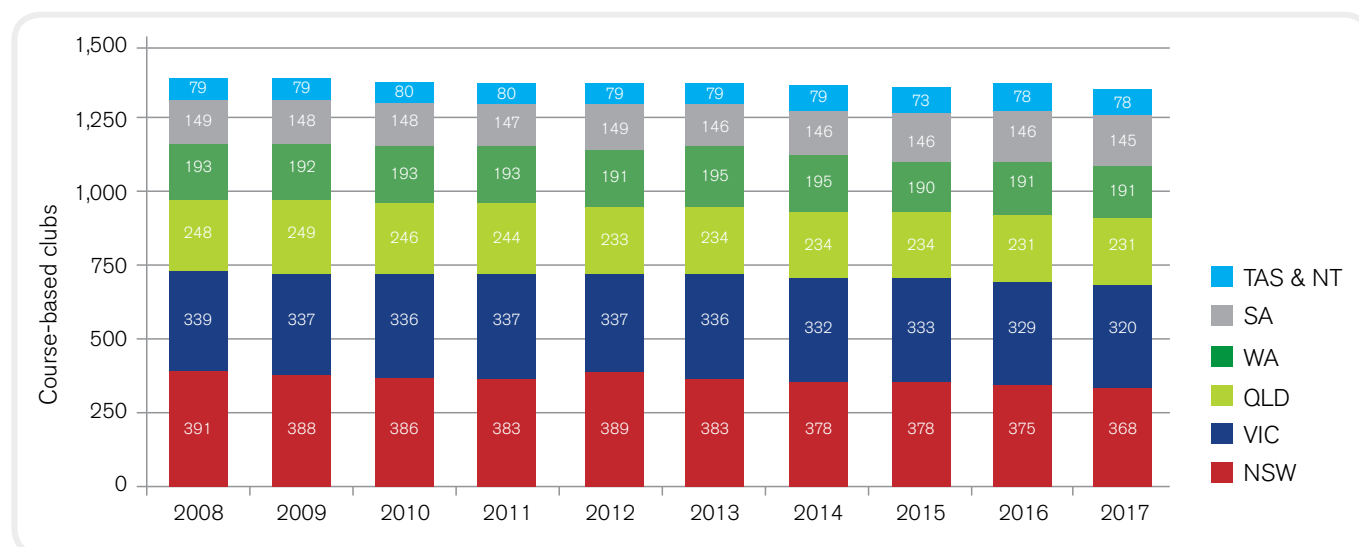
Key observations noted from the size profile data outlined above include:

- New South Wales has the most number of golf course-based clubs with 366, and the highest average member count with 394. The large number of metropolitan clubs in New South Wales largely drives this result.
- Western Australia has the highest number of social clubs with 127 with an increase of eight over 2016 and the lowest average member count at golf course-based clubs with 139.

Golf Course Based Clubs

There are currently 1,335 golf course-based clubs in Australia. There has been a decline of 4.6% in clubs over the past 10-year period, from a high of 1,399 in 2008. The reduction in 2017 is being driven by NSW and Victoria, where seven and nine fewer clubs respectively have reported membership numbers. Two of these are related to amalgamations in the Victoria metropolitan region, with the rest being regional clubs. This data is depicted in Chart 5.

Chart 5 – Course-based clubs annual count



Source: ERASS, AusPlay

04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Club Playing Members

2017 National Total

For the 2017 period, national membership numbers across Australia were reported as 389,672. This result marked a 1.1% decline on numbers reported for the prior 12-month period, equating to a nett loss of 4,365 members.

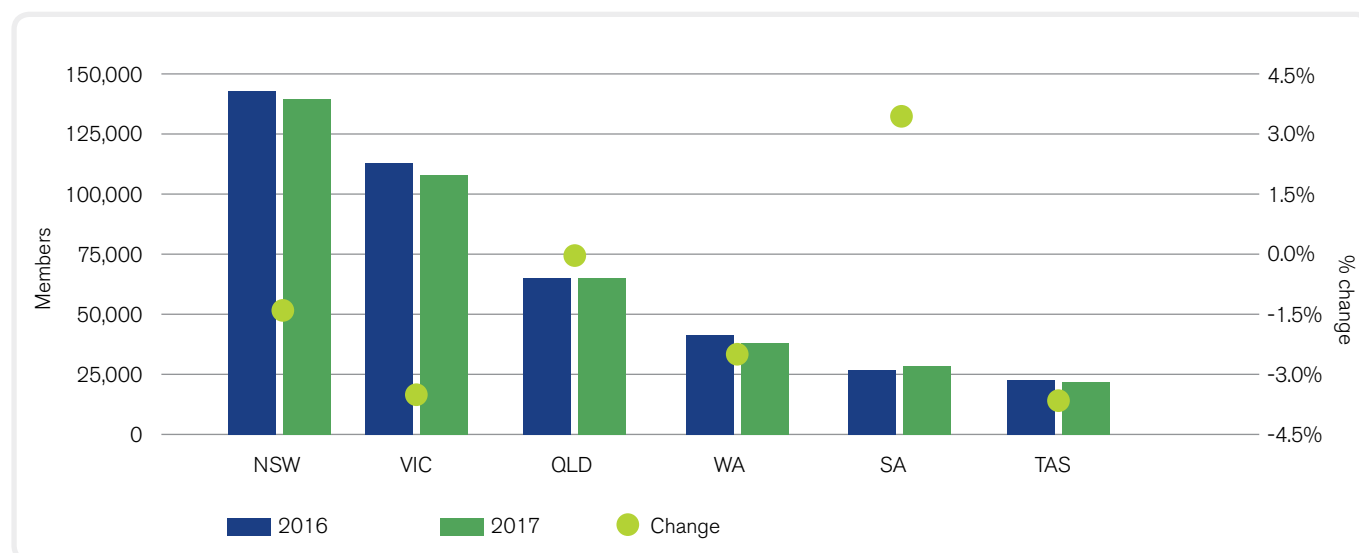
Only Queensland and South Australia experienced a nett gain in membership numbers for the period, while the decline in New South Wales and Victoria was the most significant at just under 2,000 members in each state, equating to a 1.3% and 1.8% decline respectively. Chart 6 summarises these outcomes.



-1.1%

National membership numbers across Australia showed a 1.1% decline on numbers reported for the prior 12-month period.

Chart 6 – National results by state



Source: State golf associations



04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Participation Rate

The chart below shows the participation of registered golfers (including social club members) as a percentage of population. The overall participation rate across Australia is 1.6%, while participation rates above the national average are recorded in New South Wales, Victoria and Tasmania.

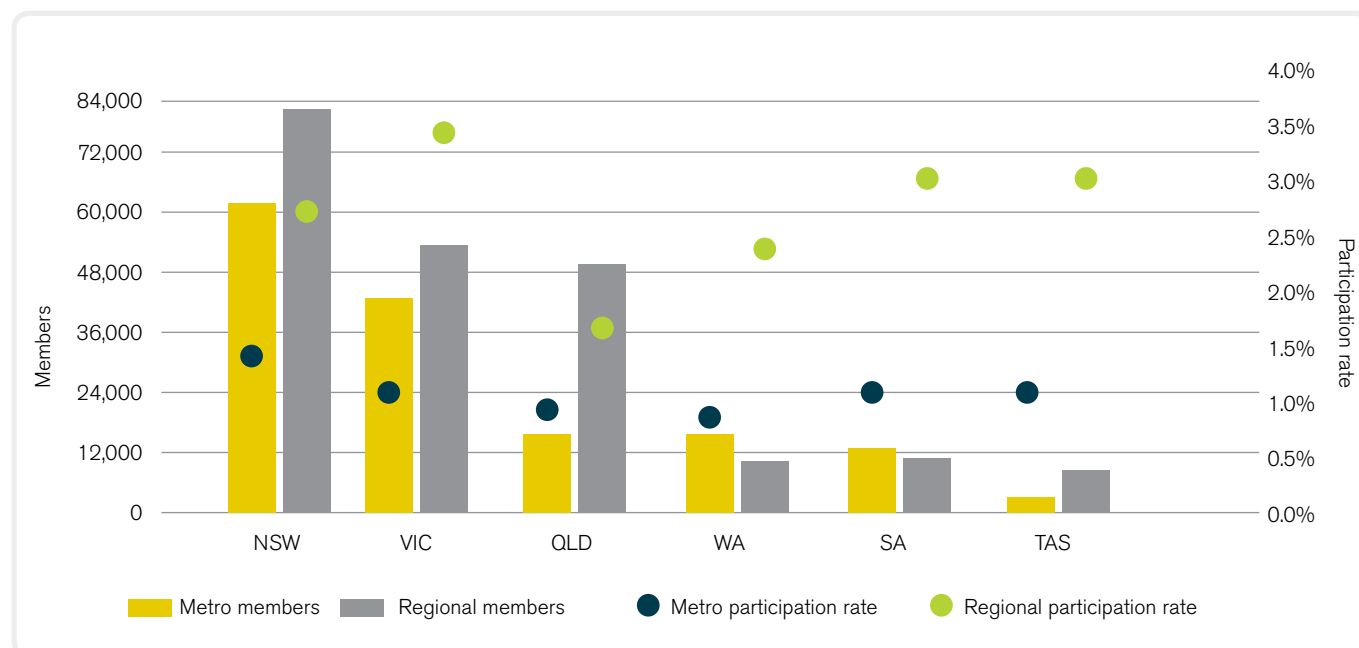
Chart 7 – Participation rate by state



Source: State golf associations, Australian Bureau of Statistics

The chart below depicts the participation of registered golfers (excluding social club members) as a percentage of each region's total population. The participation rate for all regional metropolitan areas is 2.2%, which is materially higher than the 1% applicable to metropolitan areas. These results by state/territory is depicted in Chart 8 below.

Chart 8 – Participation rate, metropolitan and regional



Source: State golf associations, Australian Bureau of Statistics

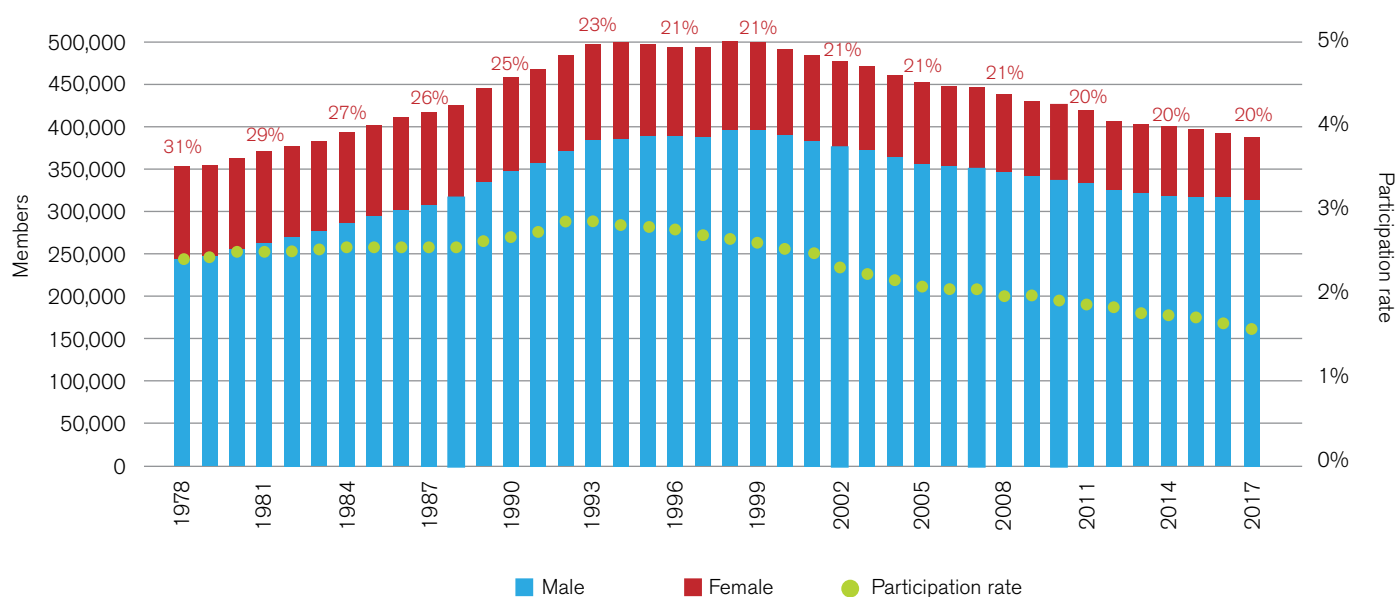
04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Historical Trends

History shows that national membership numbers peaked in 1998 at approximately 500,000. Since then, a steady decline has materialised averaging 1.3% per annum. There has also been a decline in the proportion of female members, from a high of 34% in 1970 down to 20% in 2017. Similarly, the participation rate (total members divided by total population) peaked at 2.8% in the mid 1990s before declining to its current level of 1.6% as a result of a growing population and declining membership numbers.

The long-term membership picture for males and females is illustrated in Chart 9.

Chart 9 – Historical participation



In the past five-year period a cumulative loss in total members of 3.4% has materialized, which equates to an average decline of 0.7% per year. South Australia is the only state to have experienced a nett increase in member numbers over this period.

Table 4 summarises the national results recorded for the five-year period 2013 to 2017.

Table 4

State	2013	2014	2015	2016	2017	% Change	
						1 Year	5 Year
NSW	153,594	149,855	149,023	146,174	144,261	-1.3%	-1.2%
VIC	111,907	111,026	110,519	111,485	109,280	-1.8%	-0.5%
QLD	65,781	65,282	65,262	63,754	63,784	0.0%	-0.6%
WA	32,837	33,627	33,439	33,198	32,347	-2.6%	-0.3%
SA	25,683	25,909	25,822	26,734	27,652	3.4%	1.5%
TAS	11,310	11,131	10,729	10,729	10,311	-3.9%	-1.8%
NT	2,276	2,216	2,313	2,172	2,037	-6.2%	-2.2%
Metropolitan	157,203	154,466	153,794	152,353	150,691	-1.1%	-0.8%
Regional	228,421	225,404	222,583	220,310	216,693	-1.5%	-1.0%
Social	17,764	19,176	20,730	21,583	22,288	3.3%	4.3%
Overall	403,388	399,046	397,107	394,246	389,672	-1.1%	-0.7%
# Course-based clubs	1,372	1,363	1,351	1,347	1,335	-0.9%	-0.7%

Source: State golf associations

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 areas

The overall national movement for metropolitan clubs in 2017 was a decline of 1.1%, with an average annual decline of 0.8% evident over the past five years. Tasmania was the only state with positive movement over this five-year period, while the metropolitan areas in Queensland, South Australia and Tasmania all experienced modest increases in member numbers in 2017.

The results for each state are represented in Table 5.

Table 5

State	2013	2014	2015	2016	2017	% Change	
						1 Year	5 Year
NSW	65,587	63,515	63,251	62,072	61,097	-1.6%	-1.4%
VIC	44,176	43,782	44,265	44,201	43,831	-0.8%	-0.2%
QLD	15,715	15,113	14,653	14,737	14,904	1.1%	-1.1%
WA	16,317	16,730	16,457	16,235	15,545	-4.3%	-1.0%
SA	13,238	13,153	12,990	12,902	13,074	1.3%	-0.2%
TAS	2,170	2,173	2,178	2,206	2,240	1.5%	0.6%
Overall	157,203	154,466	153,794	152,353	150,691	-1.1%	-0.8%

Source: State golf associations

Note: This table excludes social clubs.

Results by Geographic Area – Regional Areas

The national movement reported for all regional based clubs in 2017 was a 1.5% decline, contributing to an average annual decline of 1.0% over the past five years. All states/territories experienced a decline in regional member numbers in 2017, with declines in excess of 3% evident in Western Australia, Tasmania and Northern Territory.

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

Table 6

State	2013	2014	2015	2016	2017	% Change	
						1 Year	5 Year
NSW	88,007	86,340	85,772	84,102	83,164	-1.1%	-1.1%
VIC	56,321	55,089	53,359	54,694	53,284	-2.2%	-1.0%
QLD	50,036	50,016	50,184	48,646	48,574	-0.1%	-0.6%
WA	11,680	11,737	11,355	11,370	10,935	-3.8%	-1.3%
SA	10,961	11,071	11,073	10,827	10,659	-1.6%	-0.6%
TAS	9,140	8,935	8,527	8,499	8,040	-5.4%	-2.5%
NT	2,276	2,216	2,313	2,172	2,037	-6.2%	-2.2%
Overall	228,421	225,404	222,583	220,310	216,693	-1.5%	-1.0%

Source: State golf associations

Note: This table excludes social clubs.

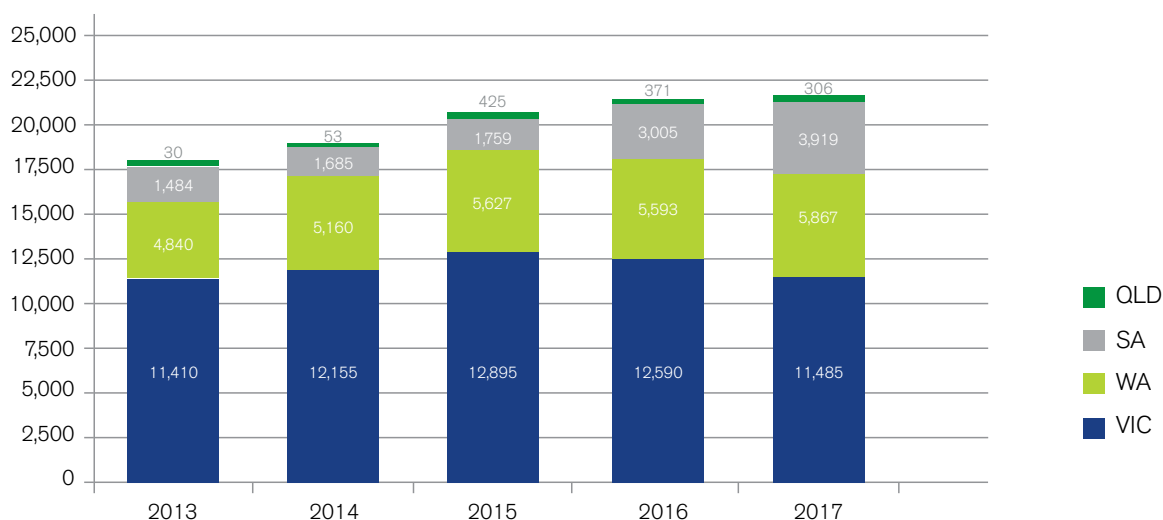
04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Club Playing Members (cont)

Social Club Members

Reported member numbers for social clubs have increased over the past from 18,018 in 2013 to 22,288 in 2017, representing an average annual increase of 4.3%. Social club members now account for 5.7% of total club members across Australia, up from 4.5% in 2013. Social club member numbers for each state are represented in Chart 10.

Chart 10 – Member numbers for social clubs



Source: State golf associations

Note: There are no affiliated social clubs in New South Wales or the Northern Territory. Tasmania has been excluded from this table as there is only one reported social club with 24 members.



04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Club Playing Members (cont)

Membership by Gender - Male

Reported male members declined by 1.1% in 2017 year, with declines of 1.1% and 1.6% respectively applicable to metropolitan and regional clubs. These results were offset by an increase in male social club members.

There was some variance evident in the results by state/territory, with Queensland and South Australia experiencing an increase in male member numbers in 2017. South Australia's male members also increased over the past five year period. These results are summarized in Table 7.

Table 7

State	2013	2014	2015	2016	2017	% Change	
						1 Year	5 Year
NSW	122,727	119,669	119,476	117,747	115,860	-1.6%	-1.1%
VIC	87,109	86,778	86,539	88,409	86,591	-1.8%	-0.1%
QLD	53,145	52,473	52,481	51,219	51,513	0.6%	-0.6%
WA	25,701	26,319	26,309	26,056	25,418	-2.4%	-0.2%
SA	20,577	20,816	20,726	21,636	22,485	3.9%	1.8%
TAS	9,280	9,153	8,865	8,952	8,532	-4.7%	-1.7%
NT	1,897	1,850	1,910	1,810	1,713	-5.4%	-2.0%
Metropolitan	126,696	124,779	124,110	123,489	122,077	-1.1%	-0.7%
Regional	179,739	177,008	175,429	174,516	171,567	-1.6%	-0.9%
Social	14,001	15,271	16,767	17,824	18,468	3.6%	5.3%
Overall	320,436	317,058	316,306	315,829	312,112	-1.1%	-0.5%

Source: State golf associations

Membership by Gender - Female

Female members declined by 1.1% in 2017. Of all states, the decline in Western Australia was greatest at 3% while Queensland experienced a slightly lower decline at 2.1%. These results are summarized in Table 8.

Table 8

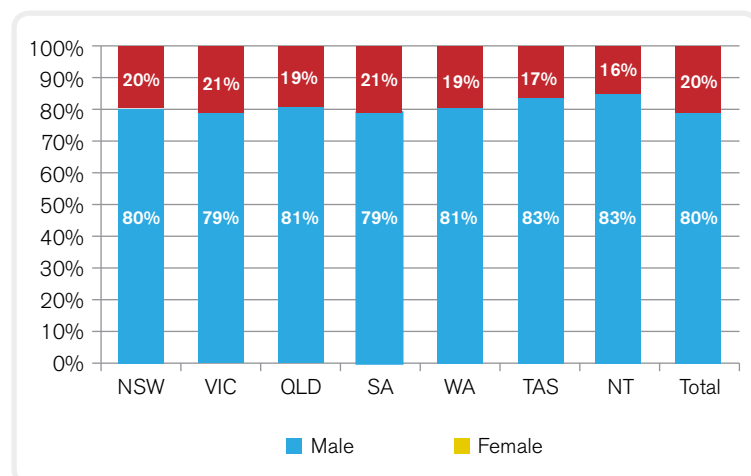
State	2013	2014	2015	2016	2017	% Change	
						1 Year	5 Year
NSW	30,867	30,186	29,547	28,427	28,401	-0.1%	-1.7%
VIC	24,798	24,248	23,980	23,076	22,689	-1.6%	-1.8%
QLD	12,636	12,809	12,781	12,535	12,271	-2.1%	-0.6%
WA	7,136	7,308	7,130	7,142	6,929	-3.0%	-0.6%
SA	5,106	5,093	5,096	5,098	5,167	1.4%	0.2%
TAS	2,030	1,978	1,864	1,777	1,779	0.1%	-2.6%
NT	379	366	403	362	324	-10.5%	-3.1%
Metropolitan	30,507	29,687	29,684	28,864	28,614	-0.9%	-1.3%
Regional	48,682	48,396	47,154	45,794	45,126	-1.4%	-1.5%
Social	3,763	3,905	3,963	3,759	3,820	1.6%	3.0%
Overall	82,952	81,988	80,801	78,417	77,560	-1.1%	-1.3%
% of total	20.6%	20.5%	20.3%	19.9%	19.9%		

Source: State golf associations

04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

With reasonably consistent declines seen in both male and female numbers, there is little change in the gender mix evident in each state. Victoria and Western Australia have the highest percentage of female members at 21% while Tasmania and the Northern Territory have the lowest proportion at 17% and 16% respectively.

Chart 4 - Gender breakdown by state/territory



Source: Golf Australia database

20%
female share of
membership base



Level of Membership Movement

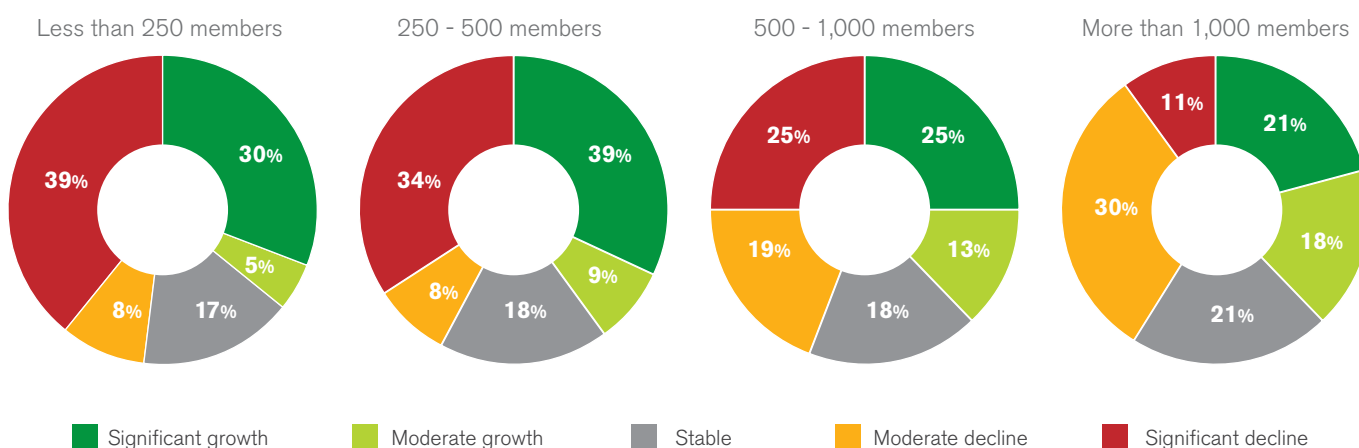
In 2017, 37% of clubs (36% in 2016) experienced a nett increase in membership numbers in excess of 2%, while 46% experienced a nett decrease (47% in 2016).

Chart 12 summarizes the proportion of clubs experiencing these positive and negative shifts in their membership base for each size category.



Stable clubs are defined as experiencing a change of less than 2% in member numbers for 2017 for clubs with up to 1,000 members, and 1% for clubs with over 1,000 members. Significant growth / decline is defined by movement of greater than 5%.

Chart 12 – Level of movement by club size



Source: State golf associations

04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Playing Member Age Profile

Average Age

The average reported age of club members across the country is 57½ years, with little variation evident across different states/territories (with the exception of the Northern Territory). In terms of gender, the average age of male members (56.1) is eight years younger than females (64.1), 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 Chart 13.

Chart 13 – Average age by state/territory



Age Distribution

The age pyramid reflects the current mix of club members. It shows a material portion of club members in older age cohorts, particularly from 60 to 75 years old, representing 38% of total members. This trend is more pronounced for female members than males, with 49% of female members aged 60 to 75 while 34% of male members are in those three cohorts. 53% of members are aged 55 years or older.



34%

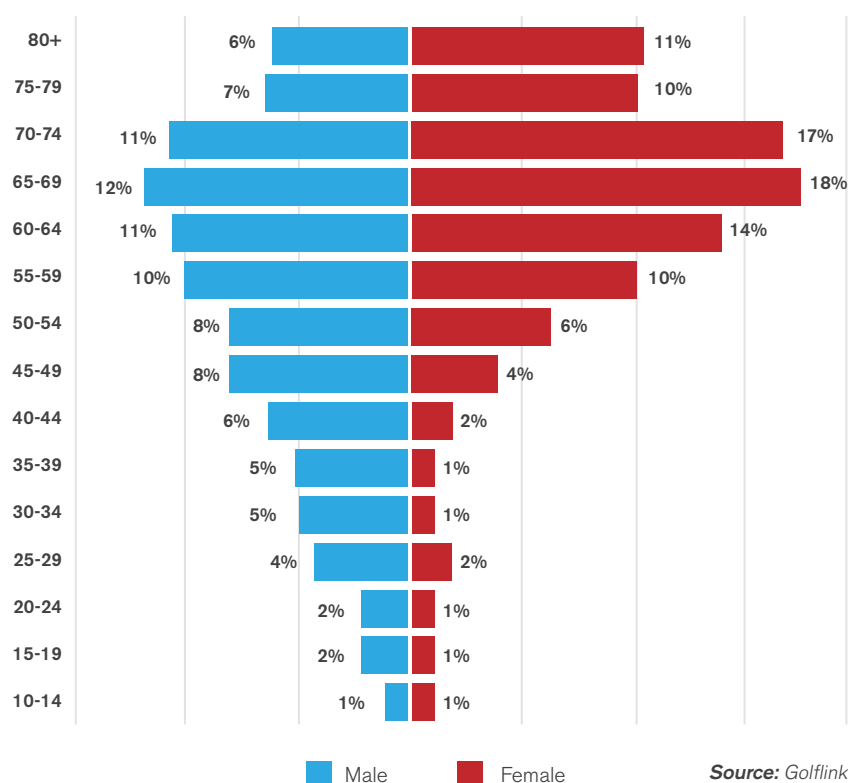
Male club members
are aged 60-75



49%

Female club members
are aged 60-75

Chart 14 – Age distribution by gender



Source: Golfink

04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Member Age Profile (cont)

Junior Members

Reported junior members (under the age of 18) totalled 13,524 in 2017, representing a decline of 2.0% over 2016. A larger decline in percentage terms was evident for junior females (-2.5%) than junior males (-1.9%). Queensland and South Australia both experienced nett increases of just under 10% in junior members in 2017. A summary of junior membership numbers by gender and state/territory is summarised in Table 9.

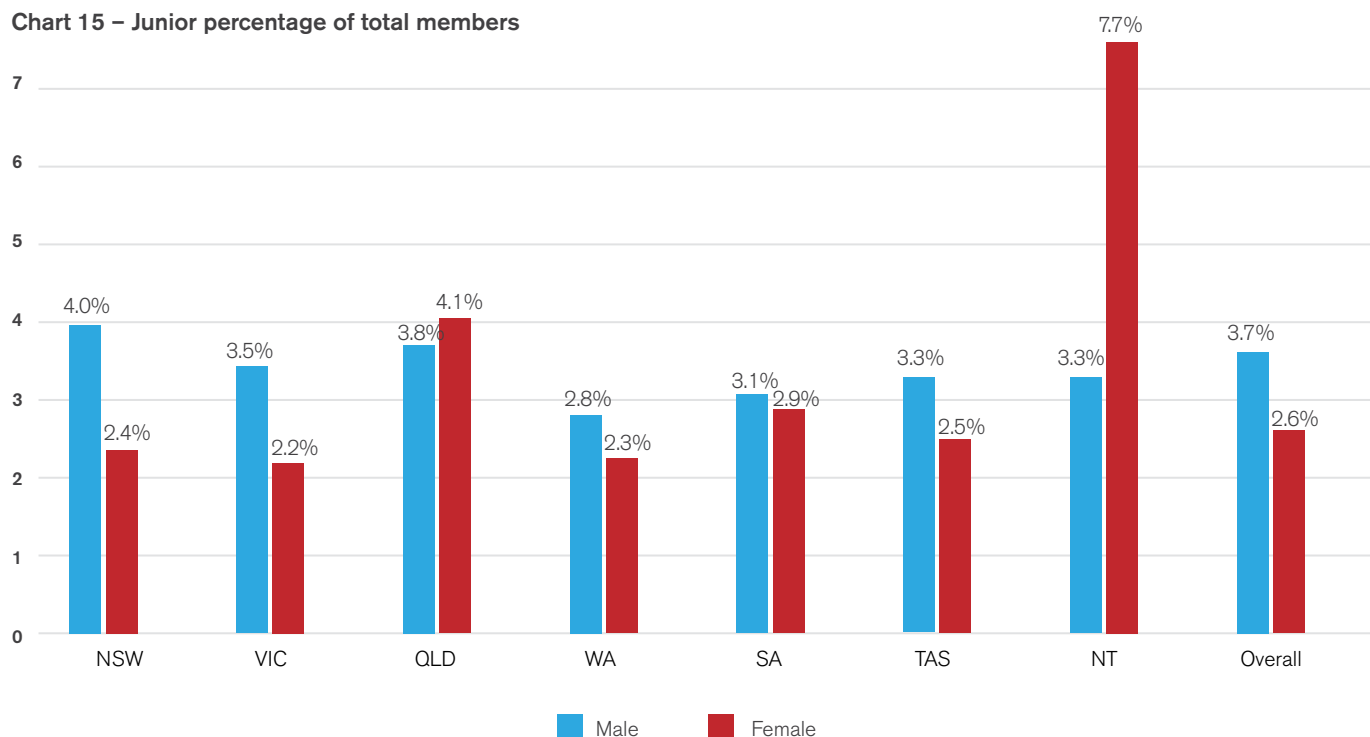
Table 9

State	Junior Male			Junior Female			Total Juniors		
	2017	2016	% Change	2017	2016	% Change	2017	2016	% Change
NSW	4,672	4,919	-5.0%	677	735	-7.9%	5,349	5,654	-5.4%
VIC	3,118	3,297	-5.4%	479	507	-5.5%	3,597	3,804	-5.4%
QLD	1,939	1,714	13.1%	503	511	-1.6%	2,442	2,225	9.8%
WA	720	750	-4.0%	158	165	-4.2%	878	915	-4.0%
SA	697	674	3.4%	151	112	34.8%	848	786	7.9%
TAS	283	293	-3.4%	45	35	28.6%	328	328	0.0%
NT	57	59	-3.4%	25	25	0.0%	82	84	-2.4%
Overall	11,486	11,706	-1.9%	2,038	2,090	-2.5%	13,524	13,796	-2.0%

Source: State golf associations

As a proportion of total members, juniors represent 3.5% of total members. Male juniors represent a slightly higher proportion at 3.7% than junior females at 2.6%. The relative proportion of junior members for both genders by state/territory is represented in Chart 15.

Chart 15 – Junior percentage of total members



04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Member Attraction & Attrition Rates

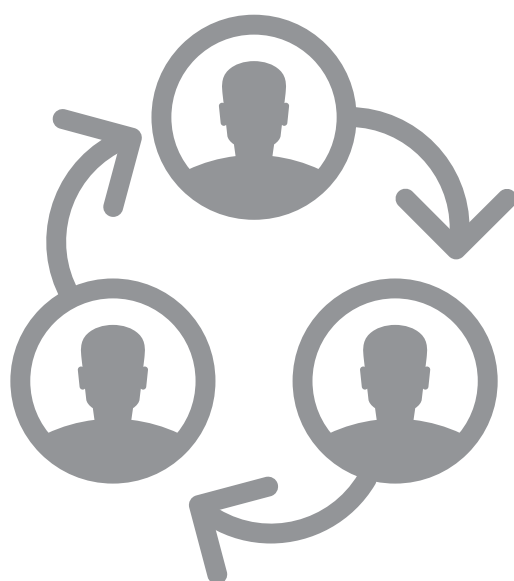
Utilising data from GolfLink, Golf Australia is able to report annual national club (excluding social clubs) attraction & attrition rates. With national new member data (defined as being those golf club members that were allocated a new GolfLink number during the year) sourced from GolfLink merged with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

For 2017, a national attraction rate of 5.4% and an attrition rate of 6.8% was recorded. Table 10 summarises the relevant attraction and attrition rates for each state by region.

Table 10

	Metropolitan		Regional		Total	
State	Attraction	Attrition	Attraction	Attrition	Attraction	Attrition
NSW	4.7%	6.3%	4.9%	5.9%	4.8%	6.1%
VIC	4.1%	4.8%	5.8%	8.2%	5.0%	6.7%
QLD	5.3%	4.2%	7.0%	7.4%	6.6%	6.6%
WA	5.7%	10.1%	6.9%	11.1%	6.2%	11.1%
SA	4.9%	3.6%	5.5%	7.0%	5.1%	5.1%
TAS	6.4%	4.9%	5.7%	11.0%	5.8%	9.8%
NT					10.5%	10.5%
Overall	4.7%	5.8%	5.8%	7.4%	5.4%	6.8%

Source: GolfLink, State golf associations



**2017 results
show a national
attrition rate of**

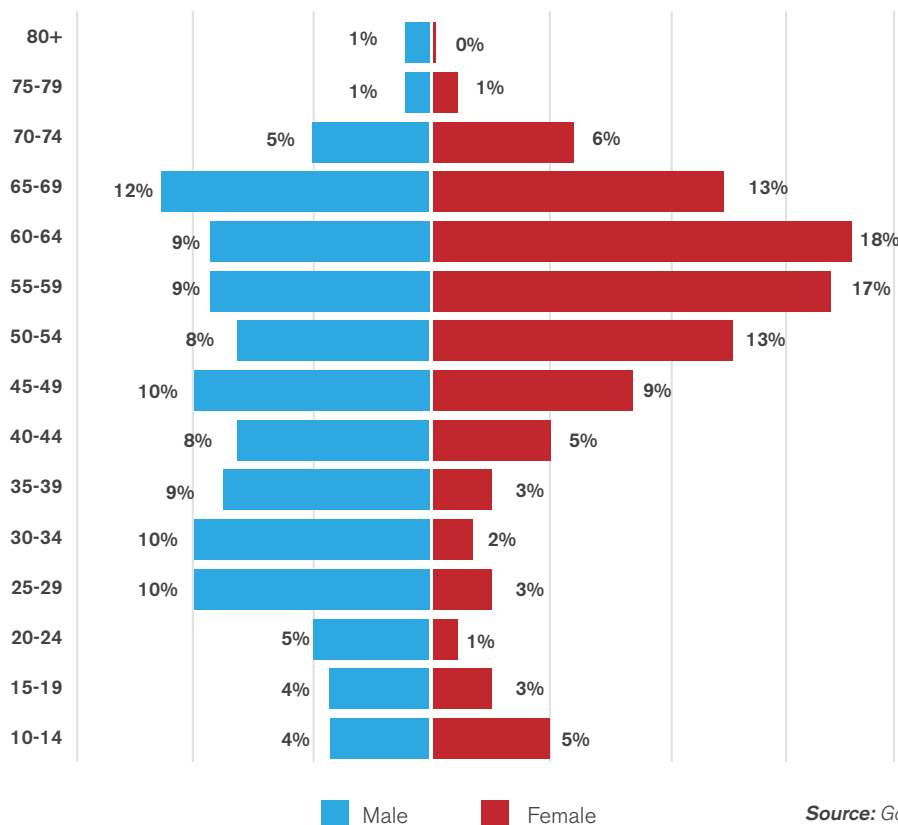
7.0%

04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

New Member Profile

The age profile of new club members in 2017 is depicted in Chart 16. For males, 61% of new members were under the age of 50 compared to 31% for females, a younger age profile than that evident across the wider membership base. Approximately 55% of new female demand is 50 years of age or greater, compared to approximately 40% for new male members.

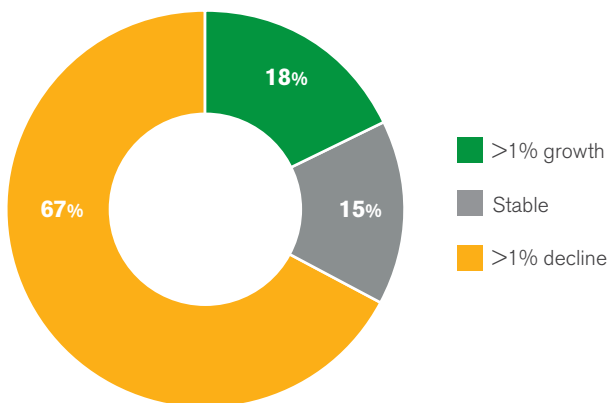
Chart 16 - New member age mix



05 STATE MEMBERSHIP OUTCOMES

Introduction

In terms of the 73 defined intrastate golf districts across the country, 13 regions (18%) experienced positive membership growth of more than 1% over the period, while 49 regions (67%) experienced a decline of more than 1%.



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.



05 STATE MEMBERSHIP OUTCOMES (CONT)

NSW

Like in 2016, 6 of the 21 districts in NSW experienced a nett increase in membership numbers in 2017. The Murray district again experienced strong growth, with average growth of 8.6% over the past five years. Only one other district has experienced a growth in member numbers over the past five years, that being Central Western district. These results are depicted in Table 11.

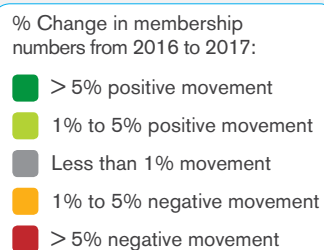
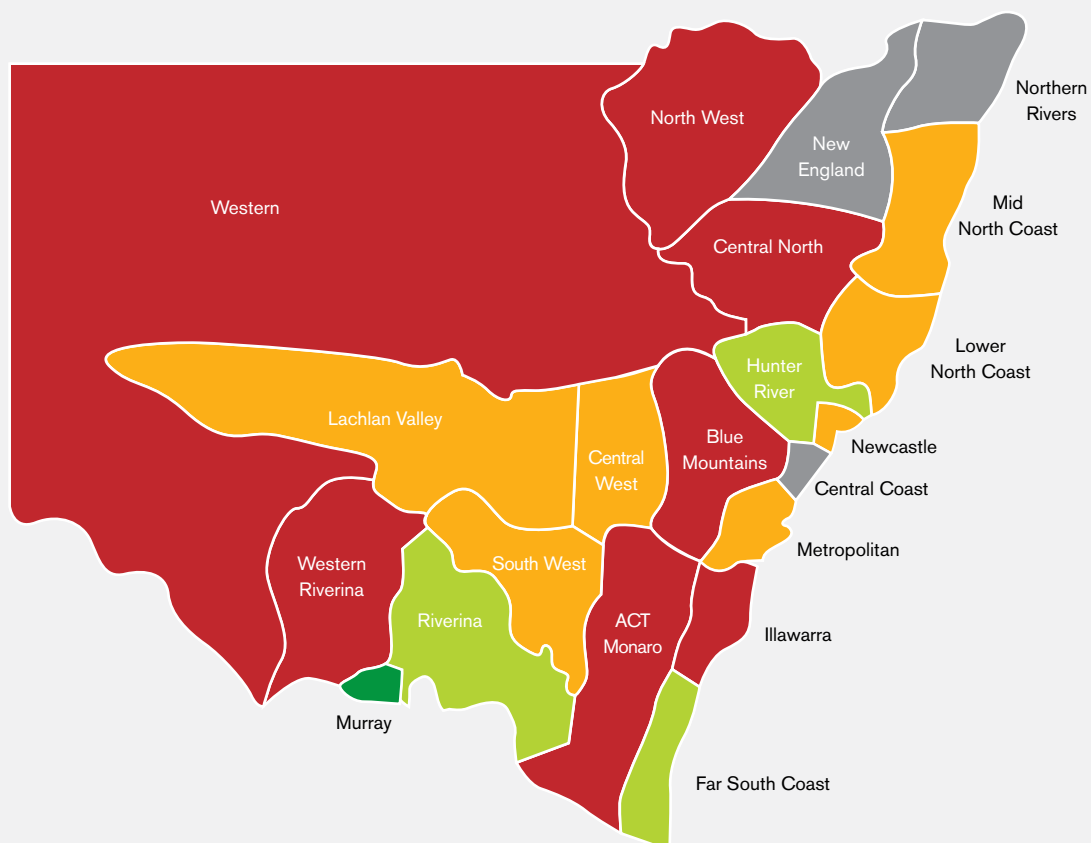
Table 11

Region	2013	2014	2015	2016	2017	% Change	
						1 Year	5 Year
Murray	4,661	4,984	5,619	6,315	7,027	11.3%	8.6%
Riverina	1,868	1,935	1,760	1,681	1,762	4.8%	-1.2%
Far South Coast	5,769	5,471	5,321	5,171	5,403	4.5%	-1.3%
Hunter River	4,260	4,216	4,191	3,848	3,941	2.4%	-1.5%
Central Coast	7,196	7,120	6,942	6,994	7,048	0.8%	-0.4%
New England	1,509	1,541	1,426	1,428	1,431	0.2%	-1.1%
Northern Rivers	8,143	7,798	7,643	7,650	7,582	-0.9%	-1.4%
Mid North Coast	5,194	5,532	5,161	4,531	4,476	-1.2%	-2.9%
Central Western	3,480	3,484	3,628	3,598	3,542	-1.6%	0.4%
Metropolitan NSW	65,587	63,515	63,251	62,072	61,097	-1.6%	-1.4%
Lower North Coast	5,202	4,728	4,806	4,710	4,628	-1.7%	-2.3%
Newcastle	8,940	8,795	8,885	8,621	8,460	-1.9%	-1.1%
South West	1,413	1,373	1,407	1,318	1,291	-2.0%	-1.8%
Lachlan Valley	901	914	884	854	827	-3.2%	-1.7%
Illawarra	9,847	9,344	9,175	8,820	8,372	-5.1%	-3.2%
ACT-Monaro	9,204	8,963	9,092	8,855	8,369	-5.5%	-1.9%
Western Riverina	1,882	1,830	1,765	1,673	1,569	-6.2%	-3.6%
Blue Mountains	2,673	2,562	2,332	2,288	2,136	-6.6%	-4.4%
Western	1,974	1,985	2,056	2,005	1,862	-7.1%	-1.2%
Central North	2,860	2,710	2,599	2,626	2,422	-7.8%	-3.3%
North West	1,031	1,055	1,080	1,116	1,016	-9.0%	-0.3%
NSW Total	153,594	149,855	149,023	146,174	144,261	-1.3%	-1.2%

Source: Golf NSW

05 STATE MEMBERSHIP OUTCOMES (CONT)

NSW - (Cont)



05 STATE MEMBERSHIP OUTCOMES (CONT)

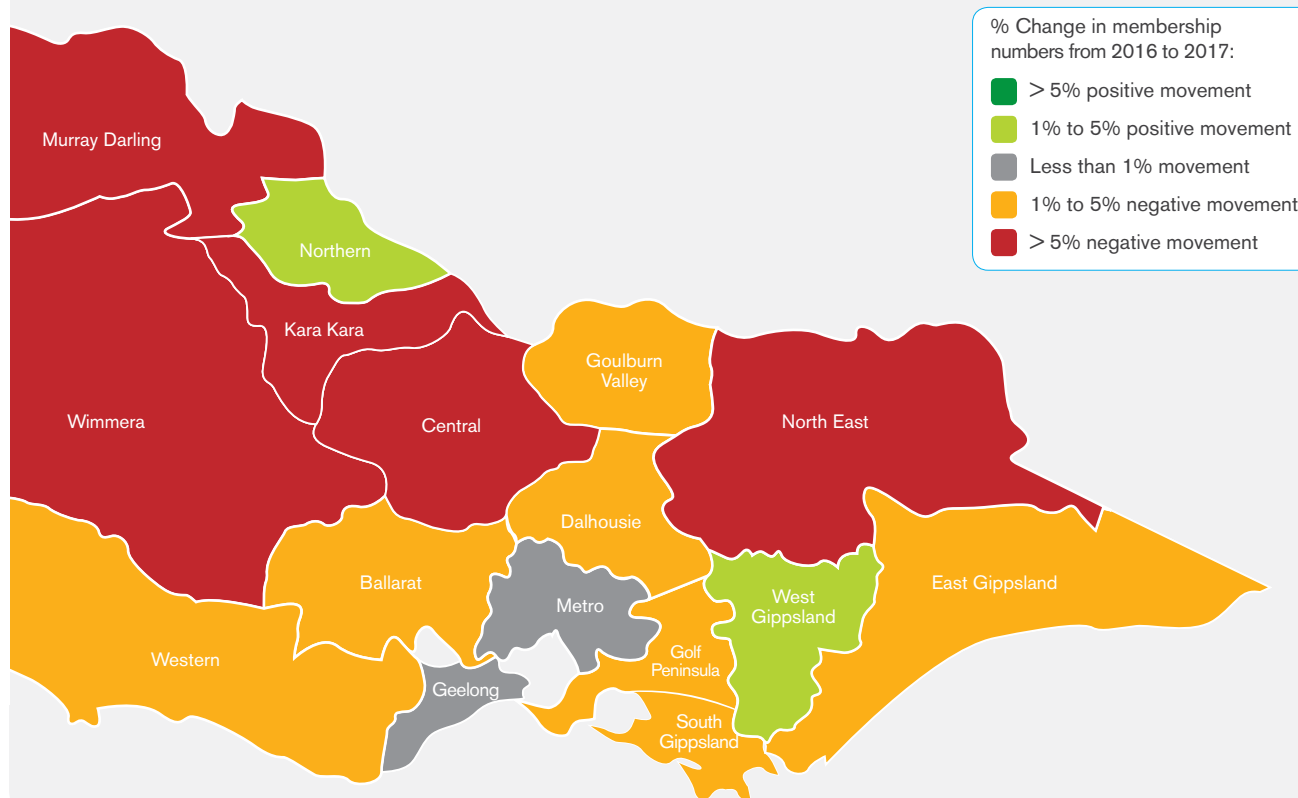
Victoria

3 of the 16 districts in Victoria experienced an increase in member numbers in 2017. Of those districts, only Geelong also experienced a wider positive 5-year trend. These results are depicted in Table 12.

Table 12

Region	2013	2014	2015	2016	2017	% Change	
						1 Year	5 Year
Northern	1,568	1,370	1,378	1,436	1,501	4.5%	-0.9%
West Gippsland	3,735	3,314	3,488	3,437	3,569	3.8%	-0.9%
Geelong	10,487	10,558	10,084	10,472	10,562	0.9%	0.1%
Metropolitan VIC	43,749	43,345	43,856	43,806	43,443	-0.8%	-0.1%
East Gippsland	2,654	2,634	2,579	2,502	2,474	-1.1%	-1.4%
Golf Peninsula	7,263	7,165	6,734	7,356	7,263	-1.3%	0.0%
Western	3,889	3,859	3,649	3,466	3,408	-1.7%	-2.6%
Goulburn Valley	5,009	4,891	4,465	4,878	4,772	-2.2%	-1.0%
South Gippsland	2,566	2,473	2,291	2,474	2,416	-2.3%	-1.2%
Ballarat	3,437	3,480	3,371	3,398	3,294	-3.1%	-0.8%
Dalhousie	2,370	2,107	2,014	1,991	1,930	-3.1%	-4.0%
Central	2,922	2,684	2,817	2,754	2,615	-5.0%	-2.2%
Wimmera	2,102	2,035	2,059	2,008	1,902	-5.3%	-2.0%
Murray Darling	2,020	2,135	2,713	2,514	2,326	-7.5%	2.9%
North East	5,540	5,372	5,057	5,348	4,850	-9.3%	-2.6%
Kara Kara	505	455	460	451	402	-10.9%	-4.5%
VIC Total	99,816	97,877	97,015	98,291	96,727	-1.6%	-0.6%

Source: Golf Victoria



05 STATE MEMBERSHIP OUTCOMES (CONT)

Queensland

6 of the 14 districts in Queensland experienced a nett increase in membership numbers in 2017, with the Sunshine Coast recording the strongest result at 2.2%. The overall state results are depicted in Table 13.

Table 13

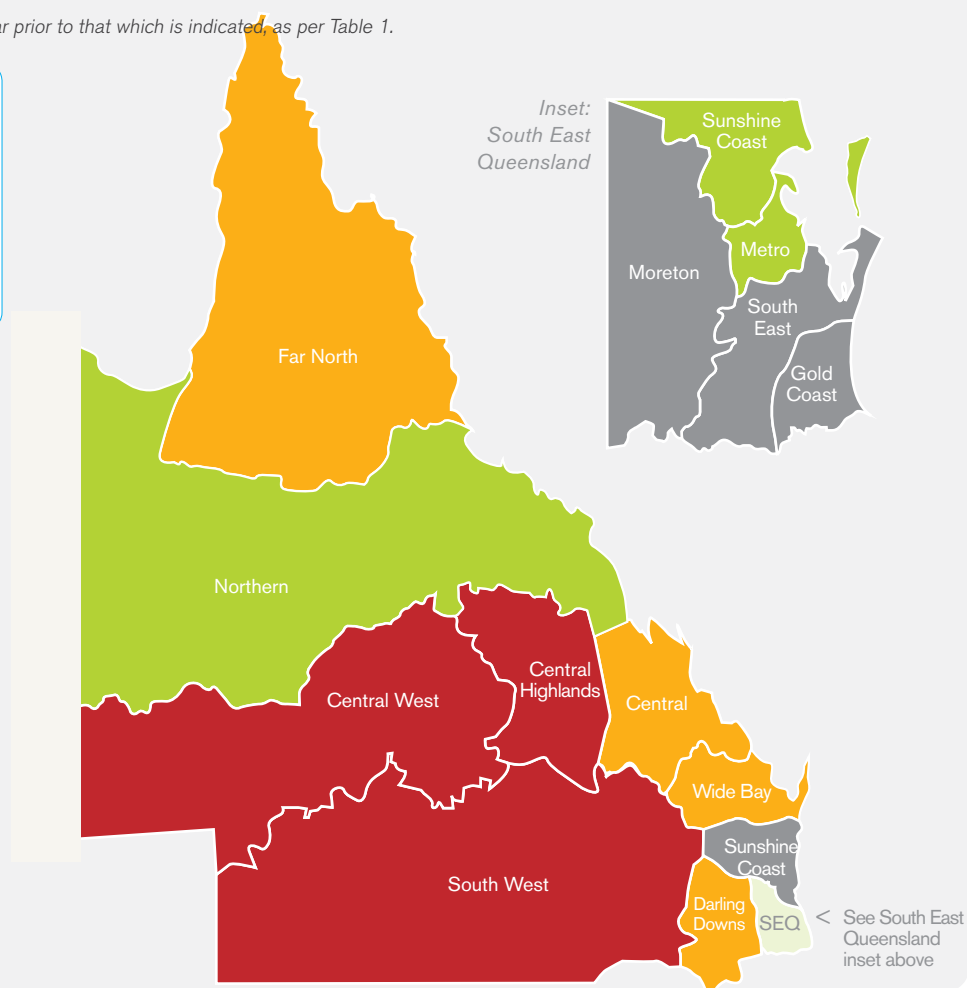
Region	2013	2014	2015	2016	2017	% Change	
						1 Year	5 Year
Sunshine Coast	12,593	12,582	12,587	12,435	12,710	2.2%	0.2%
North Qld	4,271	4,536	4,274	4,108	4,175	1.6%	-0.5%
Metropolitan Qld	15,715	15,113	14,653	14,737	14,904	1.1%	-1.1%
Gold Coast	11,046	10,848	10,810	9,981	10,069	0.9%	-1.8%
South East Qld	4,517	4,352	4,465	4,835	4,864	0.6%	1.5%
Moreton	2,098	2,087	2,200	2,011	2,016	0.2%	-0.8%
Darling Downs	3,681	3,706	3,839	3,749	3,699	-1.3%	0.1%
Far North Qld	3,237	3,204	3,032	2,952	2,898	-1.8%	-2.2%
Wide Bay	3,217	3,198	3,242	3,103	3,027	-2.4%	-1.2%
Central Qld	3,263	3,105	3,272	3,121	2,972	-4.8%	-1.9%
Central Highlands	1,014	1,307	1,382	1,285	1,180	-8.2%	3.1%
Central West	234	244	270	267	244	-8.6%	0.8%
South West Qld	865	847	811	799	720	-9.9%	-3.6%
QLD Total	65,751	65,129	64,837	63,383	63,478	0.1%	-0.7%

Source: Golf Qld

Note: Figures relate to the calendar year prior to that which is indicated, as per Table 1.

% Change in membership numbers from 2016 to 2017:

- > 5% positive movement
- 1% to 5% positive movement
- Less than 1% movement
- 1% 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 2017 for the Great Southern and Peel districts continuing a positive trend for these districts 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 14.

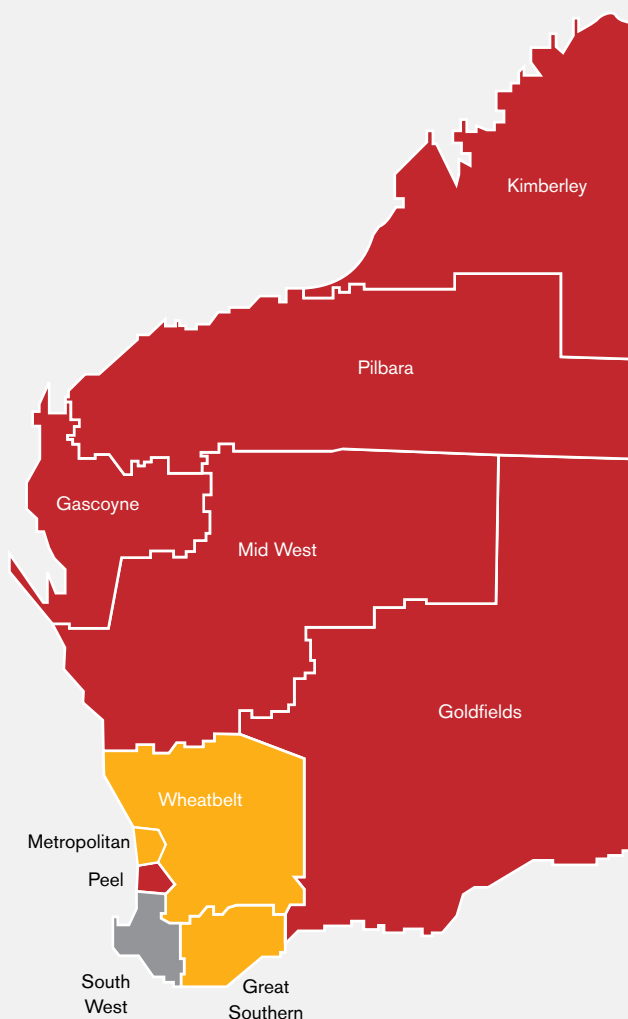
Table 14

Region	2013	2014	2015	2016	2017	% Change	
						1 Year	5 Year
South-West	4,108	4,199	3,943	4,029	3,997	-0.8%	-0.5%
Great Southern	1,263	1,305	1,301	1,394	1,380	-1.0%	1.8%
Wheat	2,295	2,299	2,399	2,241	2,193	-2.1%	-0.9%
Metropolitan WA	16,317	16,730	16,457	16,235	15,545	-4.3%	-1.0%
Kimberley	468	448	451	410	380	-7.3%	-4.1%
Pilbara	495	486	422	423	391	-7.6%	-4.6%
Mid West	1,169	1,164	1,017	1,084	999	-7.8%	-3.1%
Goldfields	1,072	1,011	975	892	793	-11.1%	-5.9%
Peel	681	694	717	765	685	-10.5%	0.1%
Gascoyne	129	131	130	132	117	-11.4%	-1.9%
WA Total	27,997	28,467	27,812	27,605	26,480	-4.1%	-1.1%

Source: Golf WA

% Change in membership numbers from 2016 to 2017:

- > 5% positive movement
- 1% to 5% positive movement
- Less than 1% movement
- 1% to 5% negative movement
- > 5% negative movement



05 STATE MEMBERSHIP OUTCOMES (CONT)

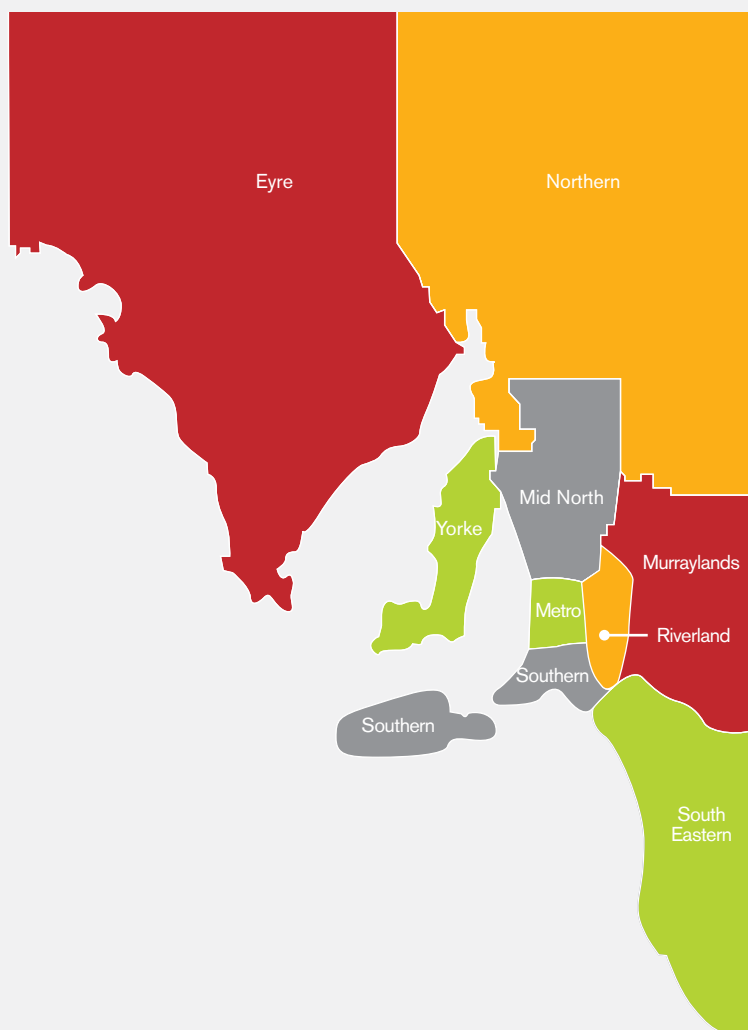
South Australia

Like in 2016, three of the nine districts experienced a nett increase in membership numbers in 2017, including the metropolitan market. The district of Yorke has also experienced a modest increase in member numbers over the past five years. These results are depicted in Table 15.

Table 15

Region	2013	2014	2015	2016	2017	% Change	
						1 Year	5 Year
Yorke	923	938	982	972	1,019	4.8%	2.0%
Metropolitan SA	13,238	13,153	12,990	12,902	13,074	1.3%	-0.2%
South Eastern	1,758	1,667	1,630	1,650	1,671	1.3%	-1.0%
Mid North	1,423	1,404	1,384	1,421	1,420	-0.1%	0.0%
Southern	3,408	3,534	3,607	3,449	3,427	-0.6%	0.1%
Riverland	562	631	590	528	516	-2.3%	-1.7%
Northern SA	994	990	952	960	916	-4.6%	-1.6%
Murraylands	717	728	702	665	609	-8.4%	-3.2%
Eyre	1,176	1,179	1,226	1,182	1,081	-8.5%	-1.7%
SA Total	24,199	24,224	24,063	23,729	23,733	0.0%	-0.4%

Source: Golf SA



% Change in membership numbers from 2016 to 2017:

- > 5% positive movement
- 1% to 5% positive movement
- Less than 1% movement
- 1% to 5% negative movement
- > 5% negative movement

05 STATE MEMBERSHIP OUTCOMES (CONT)

Tasmania

Only the Southern Metropolitan region in Tasmania experienced an increase in member numbers in 2017, with an increase of 1.5% evident. While numbers in this region have also increased over the past five years, negative outcomes are evident in the other three regions both in 2017 and over the past five years. These results are depicted in Table 16.

Table 16

Region	2013	2014	2015	2016	2017	% Change	
						1 Year	5 Year
Southern Metropolitan	2,170	2,173	2,178	2,206	2,240	1.5%	0.6%
Southern Country	3,099	3,029	2,909	2,865	2,744	-4.2%	-2.4%
North	3,510	3,468	3,270	3,316	3,141	-5.3%	-2.2%
North West	2,531	2,438	2,348	2,318	2,155	-7.0%	-3.2%
TAS Total	11,310	11,108	10,705	10,705	10,280	-4.0%	-1.9%

Source: Golf Australia

% Change in membership numbers from 2016 to 2017:

- > 5% positive movement
- 1% to 5% positive movement
- Less than 1% movement
- 1% to 5% negative movement
- > 5% negative movement

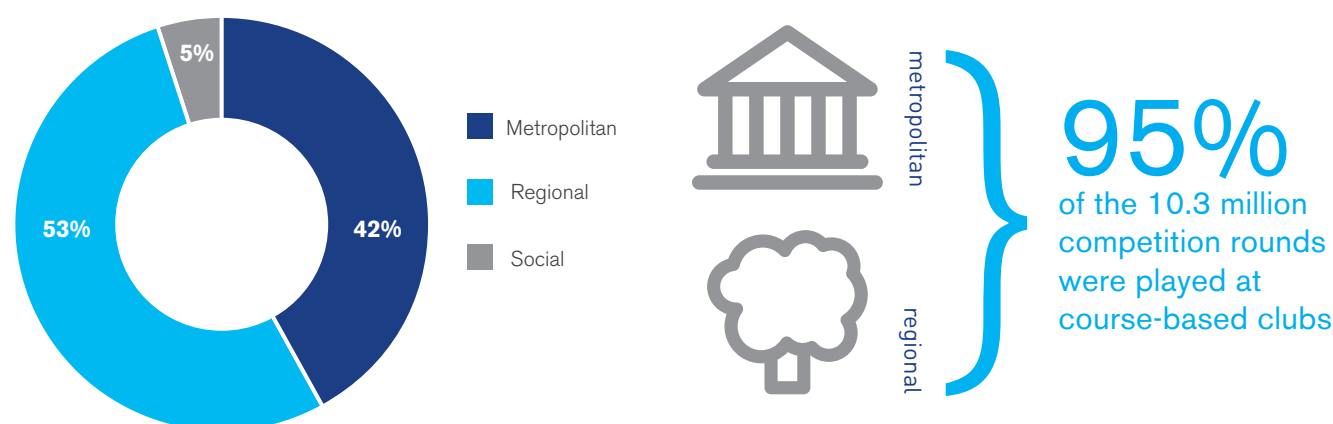


06 CLUB GOLF COMPETITION ROUNDS

National Results

For the twelve month period to end December 2017, 10.3 million competition rounds were recorded by GolfLink across their database of golf clubs. 95% of those rounds were played at course-based clubs, while the remaining 5% relate to various social clubs.

Chart 18 – Rounds breakdown by club designation



Results by State

Mixed outcomes were reported on a state basis, with growth evident in Victoria, Western Australia, South Australia and Tasmania. Rounds at metropolitan clubs increased slightly in 2017, and slightly declined for regional clubs.

Five year data from GolfLink is summarised in Table 17.

Table 17

State	2013	2014	2015	2016	2017	% Change	
						1 Year	5 Year
NSW	3,800,216	3,846,549	3,708,109	3,756,462	3,745,605	-0.3%	-0.3%
VIC	2,409,927	2,429,491	2,464,184	2,418,453	2,459,859	1.7%	0.4%
QLD	1,627,151	1,748,120	1,720,256	1,809,631	1,753,540	-3.1%	1.5%
WA	782,868	799,758	820,094	812,806	814,684	0.2%	0.8%
SA	719,968	703,273	711,909	697,268	705,250	1.1%	-0.4%
TAS	260,886	267,752	271,641	255,926	269,272	5.2%	0.6%
NT	44,939	44,773	42,570	42,438	40,064	-5.6%	-2.3%
Metropolitan	4,237,101	4,298,950	4,265,156	4,291,248	4,293,685	0.1%	0.3%
Regional	5,408,854	5,540,766	5,473,607	5,501,736	5,494,589	-0.1%	0.3%
Course-based clubs	9,645,955	9,839,716	9,738,763	9,792,984	9,788,274	0.0%	0.3%
Social	303,036	466,502	501,203	513,484	533,381	3.9%	12.0%
Overall	9,948,991	10,306,218	10,239,966	10,306,468	10,321,655	0.1%	0.7%

Source: GolfLink, Golf Australia

NB. Social clubs reporting rounds with GolfLink do not align with those reporting membership numbers that appear in earlier sections of this report.

Results by State (cont)

Tasmania experienced the largest increase in rounds played for the calendar year, recording 5% growth over 2016, with rounds returning to a similar level to 2015. For most states, stronger results through the winter months offset poor 1st quarter outcomes. Rounds played by state for each quarter of 2017 and the movement recorded over the corresponding period in 2017 are summarised in Table 18.

Table 18

State	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	Total
NSW	908,110	982,713	1,036,488	1,006,374	3,933,685
VIC	701,918	665,265	561,657	649,136	2,577,976
QLD	419,925	464,614	513,261	395,761	1,793,561
WA	228,572	258,117	233,682	233,163	953,534
SA	191,125	197,816	175,733	183,127	747,801
TAS	75,862	67,916	56,853	74,403	275,034
NT	7,824	11,309	12,558	8,373	40,064
Total	2,533,336	2,647,750	2,590,232	2,550,337	10,321,655
% change from 2016					
NSW	-11%	0%	15%	-2%	0%
VIC	-4%	4%	3%	3%	1%
QLD	-7%	-1%	7%	-11%	-3%
WA	-1%	4%	-2%	1%	1%
SA	-6%	5%	7%	1%	1%
TAS	-4%	8%	7%	12%	5%
NT	-19%	-5%	6%	-7%	-6%
Total	-7%	2%	8%	-2%	0%

Source: GolfLink, Golf Australia



07 PROGRAM PARTICIPANTS, EVENTS, DELIVERERS & OFFICIALS

Table 19 summarises a number of key participation areas that are measured by Golf Australia as a requirement to the report to the Australian Sports Commission.

Table 19

CATEGORY	2012/13 ACTUAL	2013/14 ACTUAL	2014/15 ACTUAL	2015/16 ACTUAL	2016/17 ACTUAL
Program Participants					
MyGolf National Junior Program	4,846	939	3,480	6,254	9,674
Other Non-MyGolf Junior Programs	8,974	12,577	10,586	11,696	11,299
Crown Lager Social/GA Social Golf Club	2,478	2,898			
Qantas Golf Club			35,486	121,080	125,740
Other Casual Golf Programs	7,550	7,027	3,268	6,595	4,531
Indigenous	2,513	1,458	1,687	1,888	1,728
Disability	1,549	2,224	2,645	5,956	8,195
Female	15,005	12,536	7,363	6,380	11,535
Seniors	13,213	14,063	4,068	3,595	4,327
New Formats			6,342	29,032	40,540
Swing Fit				430	640
Other programs	1,004	2,576	1,305	1,370	2,966
	57,132	56,298	76,230	194,276	221,175
Event Entries (Men/Women/Mixed/Jnrs)					
Member Association State & Territory Events	56,575	50,894	56,798	57,573	50,504
Junior Foundation Events	7,447	7,696	9,232	8,215	9,516
Golf Australia National Events	1,724	1,665	1,545	1,631	1,653
PGA Events	98,422	93,829	96,656	82,944	84,515
ALPG Events	791	959	952	1,123	969
	164,959	155,043	165,183	151,486	147,157
School Delivered Programs Participants					
MyGolf Schools 1 (primary) program	45,936	56,499	52,404	47,819	46,956
MyGolf Schools 1 (primary) "tasters"	47,556	36,781	26,631	28,202	14,980
AASC/Sporting Schools Golf Program	13,820	16,035	8,292	18,124	21,409
MyGolf Schools 2 (secondary) program	24,854	22,748	19,619	16,049	21,060
MyGolf Schools 2 (secondary) "tasters"	2,312	1,518	518	595	220
Other Non-MyGolf School Programs	5,687	7,991	7,053	7,214	6,293
	140,165	141,572	114,517	118,003	110,918
School Managed Competitions Participants					
SSA 12 Yrs & Under Championship	2,401	3,698	4,623	3,668	3,985
SSA 19 Yrs & Under Championship	1,014	1,639	1,503	1,724	1,506
	3,415	5,337	6,126	5,392	5,491
Program Deliverers & Officials					
Development Personnel	33	34	34	40	37
Community Golf Instructors	1,383	1,728	1,699	1,496	1,167
AASC/Sporting Schools Golf Coaches	678	502	419	182	374
PGA Coaches	1,615	1,562	1,652	1,662	1,648
ALPG Coaches	57	57	72	84	90
Rules Officials	4,886	4,796	4,563	4,736	4,769
Course Raters	418	248	157	96	20
	9,070	8,927	8,596	8,296	8,105

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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