



GolfAustralia

2018

Golf Club Participation Report of Australia

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Photo: Queensland Outback Masters

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01 KEY FINDINGS

A SNAPSHOT OF THE 2018 GOLF CLUB PARTICIPATION REPORT

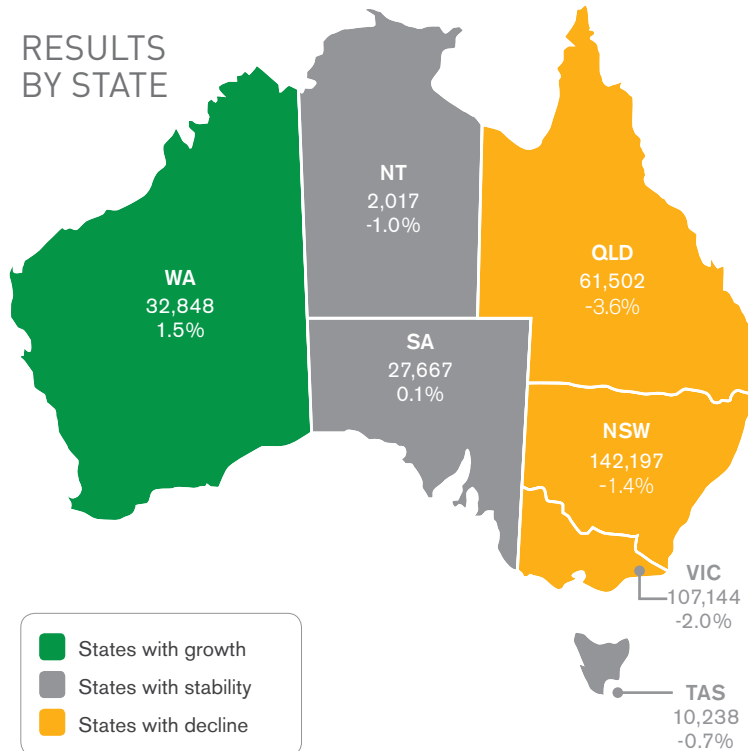
TOTAL CLUB MEMBERS

 383,613

 1.6% decline from 2017

 Average annual decline 0.8% over past 5 years

RESULTS BY STATE



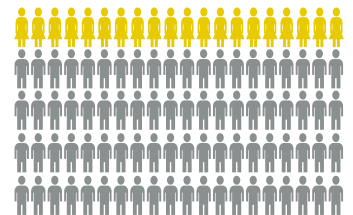
56yrs



64yrs


Average age of male and female members is 56 years and 64 years respectively

20% female share of membership base




TOTAL GOLF PARTICIPANTS (15 YRS +) (AUSPLAY)

 945,900


 6.0% decline from 2017

 4.9% of population

METROPOLITAN CLUB MEMBERS

 149,420 across 205 clubs


 39% of members

 0.8% decline from 2017


REGIONAL CLUB MEMBERS

 212,047 across 1,121 clubs


 55% of members

 2.1% decline from 2017

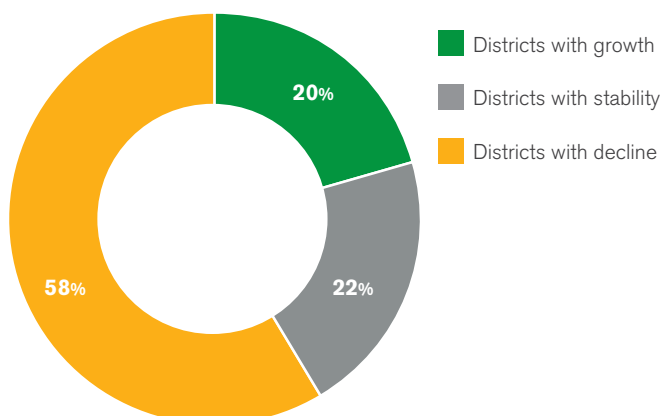
SOCIAL CLUB MEMBERS

 22,146 across 328 clubs

 6% of members

 0.6% decline from 2017

CHANGE IN MEMBERS BY DISTRICT IN 2018



CLUB PARTICIPATION RATE: MEMBERS AS % OF POPULATION

OVERALL: 1.5%



ADULT:

1.9%



JUNIOR:

0.5%

02 REPORT BACKGROUND



Introduction

It continues to be the goal of Golf Australia to provide the wider golf industry with information that enables the sport to understand the current landscape and trends in golf participation.

Now in its 6th year, the Golf Club Participation Report of Australia has become a key component of Golf Australia's communication strategy and is an invaluable reference as clubs and other industry stakeholders seek to understand current trends and in turn develop evidenced based strategies that aim to enhance demand and increase the game's long term sustainability.



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 all of past published participation reports for Golf Australia, along with a number of other leading industry reference reports covering such topics as club operational and salary benchmarking, membership attrition and retention, national rounds played, and golf retail operations.

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



03 BROADER GOLF PARTICIPATION TRENDS

Introduction to AusPlay

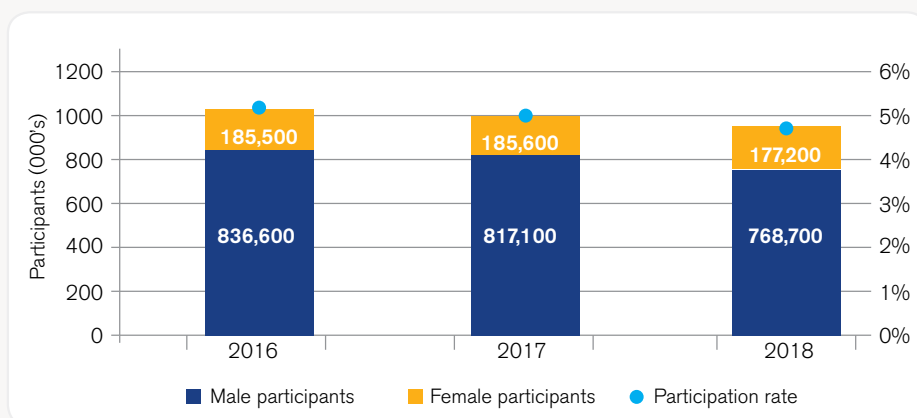
In 2016 the Australian Sports Commission (ASC) recommenced its reporting on sports participation in Australia. Titled AusPlay, this now annual release of participation data across all sports enables a broader perspective of golf participation outside of the membership model as well as the ability to compare trends of golf participation to those of other sports.

The latest AusPlay data (labelled here as 2018) and sourced from more than 20,000 interviews, relates to the 2018 fiscal year. 2016 and 2017 figures are included for comparison purposes.

Golf Participants According to AusPlay

An estimated 946,000 adults (15+ years old) participated in golf for 2018. This equates to 4.7% of the adult population, down from 5.2% in 2016. 81% of participants in 2018 are male and 19% female, a ratio similar to prior reporting periods. These outcomes are summarised in Chart 1.

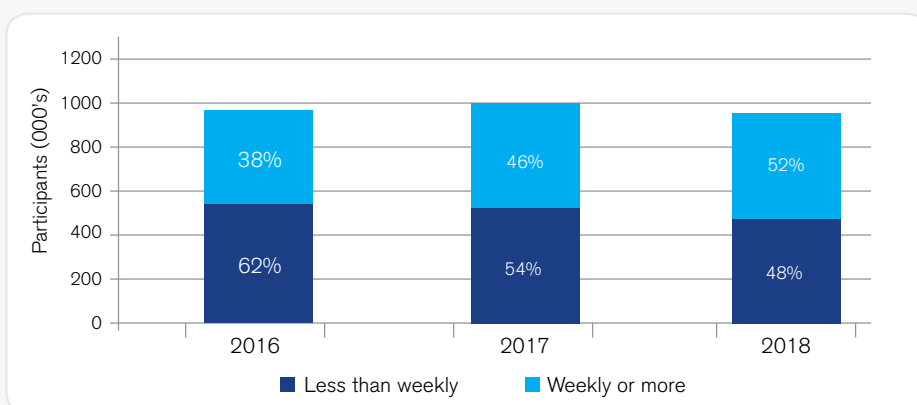
Chart 1 - Annual golf participants by gender and overall participation rate



Source: AusPlay

Although overall participation is falling, AusPlay data indicates the frequency mix is shifting. In 2018, 52% of participants played golf on at least a weekly basis compared to 46% in 2017 and 38% in 2016. These results, which indicate a higher proportion of frequent participants in 2018 compared to prior years, are summarised in Chart 2.

Chart 2 - Annual golf participants by frequency



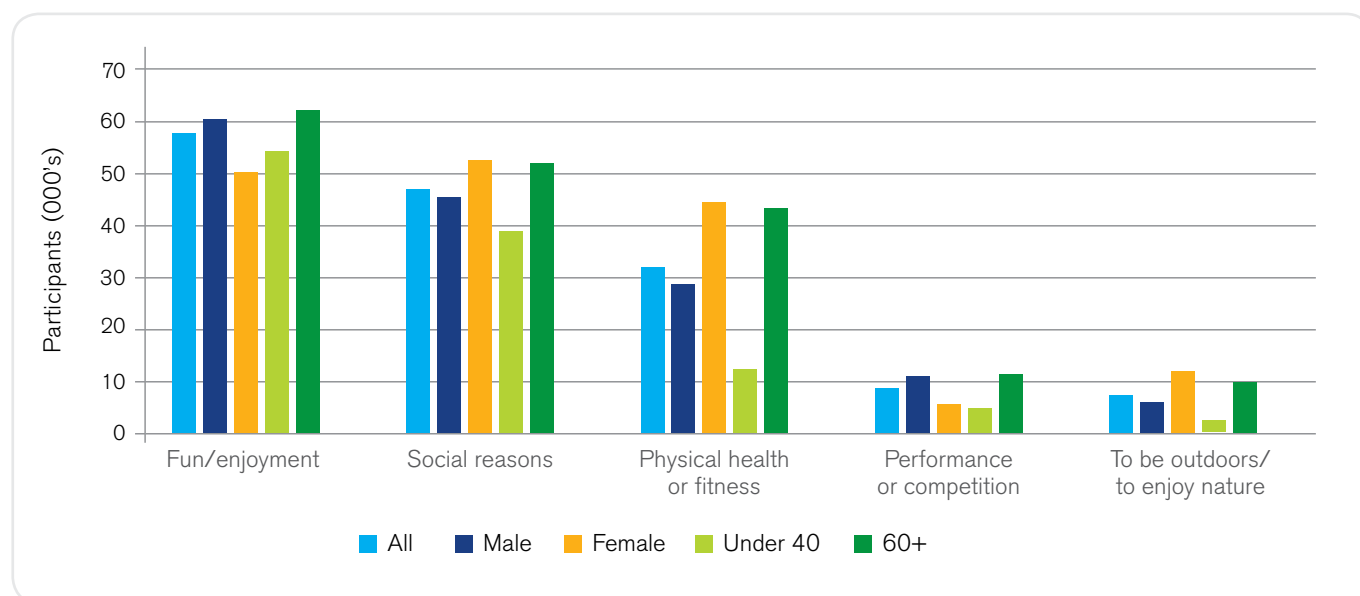
Source: AusPlay

03 BROADER GOLF PARTICIPATION TRENDS (CONT)

Motivations and Barriers to Participation

In addition to participation data, the AusPlay survey also collects data concerning motivations and barriers to participation. This data serves as a key reminder to the industry of what needs the sport is satisfying for participants, from the sport, guidance concerning industry marketing initiatives and challenges to be dealt with through on-going development of golf's consumer offer.

Chart 3 – Motivations for golf participation



Source: AusPlay

Key findings concerning **motivations** for participation include:

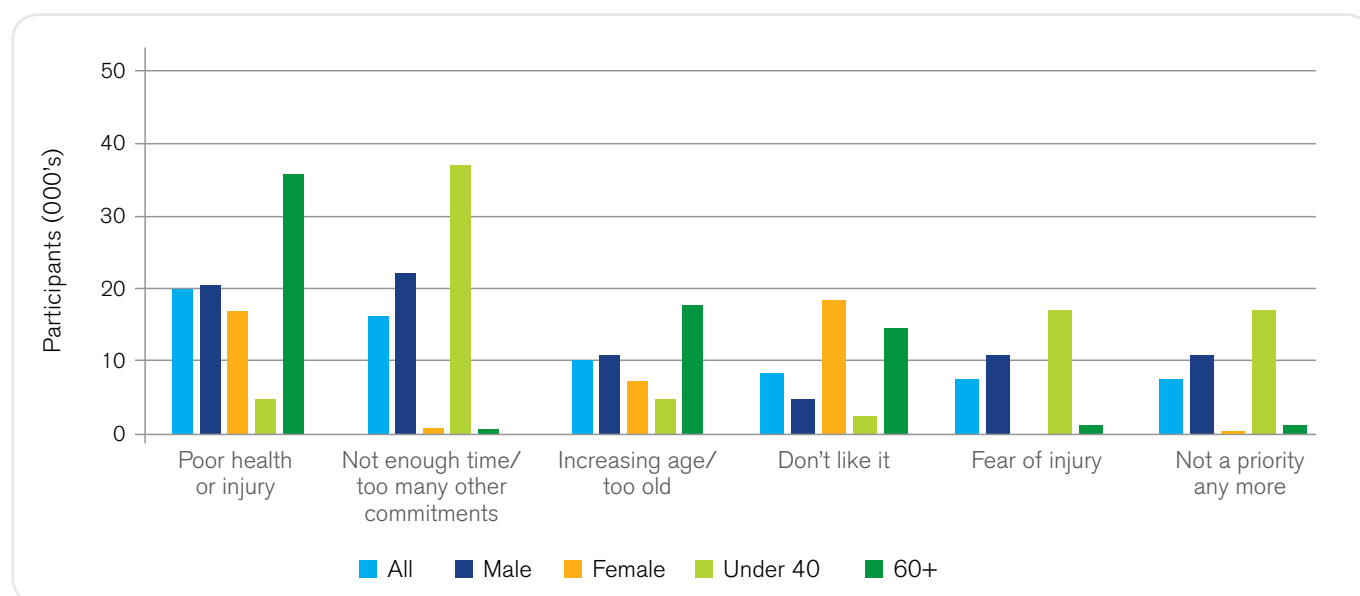
- The #1 motivating factor is fun/enjoyment, followed by the social nature (group participation pre/during/post) of the sport.
- Social reasons and physical health or fitness are generally more important for female participants and participants aged 60+
- Less important for all markets are motivations concerning competition or performance.

THE NUMBER 1
MOTIVATING FACTOR
IS FUN/ENJOYMENT
FOUND IN THE SPORT

03 BROADER GOLF PARTICIPATION TRENDS (CONT)

Motivations and Barriers to Participation (cont)

Chart 4 – Barriers to golf participation



Source: AusPlay

Key findings concerning **barriers** to participation are:

- The primary barrier to on-going participation is poor health or injury. This barrier is particularly prevalent for the 60+ year age group.
- The second barrier is time and other competing activities. This barrier is particularly prevalent for the under 40 year age group. This barrier is one that can be somewhat addressed by providing alternative forms of participation that require less time.

THE NUMBER 1
BARRIER TO ON-GOING
PARTICIPATION IS POOR
HEALTH OR INJURY

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	Numbers relate to...
NSW/ACT *	2017/18	May/June 2018	Most recent completed financial year
VIC	Calendar Year 2018	December 2018	Most recent completed financial year
QLD	Calendar Year 2018	December 2018	Point in time of collection
SA	2017/18	December 2018	Point in time of collection
WA	2017/18	December 2018	Point in time of collection
TAS	Calendar Year 2018	June 2018	Point in time of collection
NT	2017/18	September 2018	Point in time of collection

**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 are 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 classified as belonging to 2018

Throughout the report, Golf Clubs will refer to all metropolitan and regional clubs that are based at a golf course and are typically responsible for the operation of that facility. Social Clubs will refer to clubs with either sem-permanent access rights to a public golf course (e.g. Victorian Golf League) or 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

1,654 clubs reported membership numbers for 2018. Summarised below in Table 2 is the size profile of these golf clubs, classified by general geographic location and club size.

Table 2 – Club size profile by geographic location

Membership size	Metropolitan Golf Club	Regional Golf Clubs	% Golf Clubs	% Golf Club members	Social Clubs	Total club count
250 & less	12%	76%	66%	18%	95%	1,192
251 to 500	23%	13%	15%	20%	4%	207
501 to 750	20%	6%	8%	18%	1%	107
751 to 1,000	21%	3%	6%	19%	0%	78
Over 1,000	23%	2%	5%	26%	1%	70
Total %	100%	100%	100%	100%	100%	
Total count	205	1,121	1,326		328	1,654

Source: Golf Australia & member golf associations



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

- 66% of Golf Clubs in Australia have 250 or less members, with 81% having 500 or less members.
- 85% of Golf Clubs in Australia are located in a regional area, 76% of these clubs containing less than 250 members.
- While Golf Clubs of over 1,000 members account for only 5% of all Golf Clubs across Australia, they accommodate 26% of total Golf Club members.
- There are 328 Social Clubs, which account for 20% of total clubs.

04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Profile of Australian Clubs (cont)

The current Golf Club size profile by state/territory for 2018 is outlined in Table 3.

Table 3 - Golf Club size profile by geographic area

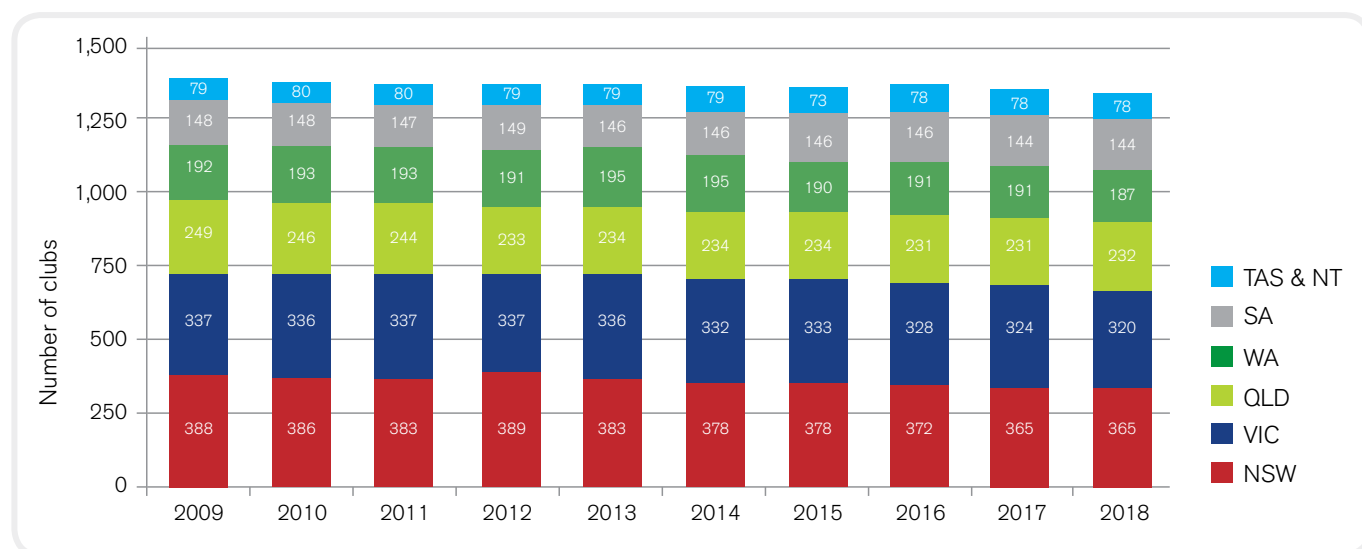
Golf Club Membership Size	NSW	VIC	QLD	WA	SA	TAS	NT	Total
Metropolitan Golf Clubs								
250 & less	10	4	1	3	7	0	0	25
251 to 500	21	11	3	7	4	2	0	48
501 to 750	20	8	3	5	4	1	0	41
751 to 1,000	21	10	4	5	2	1	0	43
Over 1,000	15	18	6	4	5	0	0	48
Total Metropolitan	87	51	17	24	22	4	0	205
Regional Golf Clubs								
250 & less	171	204	155	152	112	54	8	856
251 to 500	50	37	33	8	8	8	2	146
501 to 750	28	18	11	3	2	1	1	64
751 to 1,000	19	4	12	0	0	0	0	35
Over 1,000	10	6	4	0	0	0	0	20
Total Regional	278	269	215	163	122	63	11	1,121
Total Golf Clubs								
250 & less	50%	65%	67%	83%	83%	81%	73%	66%
251 to 500	19%	15%	16%	8%	8%	15%	18%	15%
501 to 750	13%	8%	6%	4%	4%	3%	9%	8%
751 to 1,000	11%	4%	7%	3%	1%	1%	0%	6%
Over 1,000	7%	8%	4%	2%	3%	0%	0%	5%
Total Golf Clubs	365	320	232	187	144	67	11	1,326

Source: Golf Australia & member golf associations

Golf Club Count

There are currently 1,326 Golf Clubs in Australia. There has been a steady decline in clubs over the past 10-year period, from a high of 1,393 in 2009. In 2018, four fewer clubs were reported in Victoria and Western Australia. All these clubs were in regional areas.

Chart 5 – Annual count of Golf Clubs



Source: Golf Australia & member golf associations



04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Playing Members - Results and Trends

2018 national total

National membership numbers across Australia are reported as 383,613. This result represents a 1.6% net decline from 2017.

Western Australia and South Australia experienced a net gain in membership numbers for the period of 1.5% and 0.1% respectively. The three eastern states of New South Wales, Victoria and Queensland, accounting for 78% of total membership numbers, saw declines in member numbers of 1.4%, 1.1% and 3.6% respectively.

Member numbers for 2018 compared to 2017 and the percentage change for each state are summarised in Chart 6.

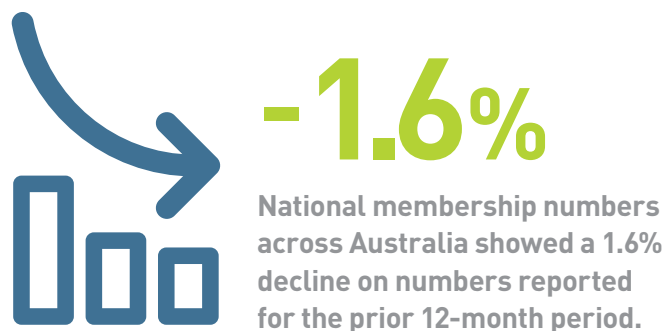
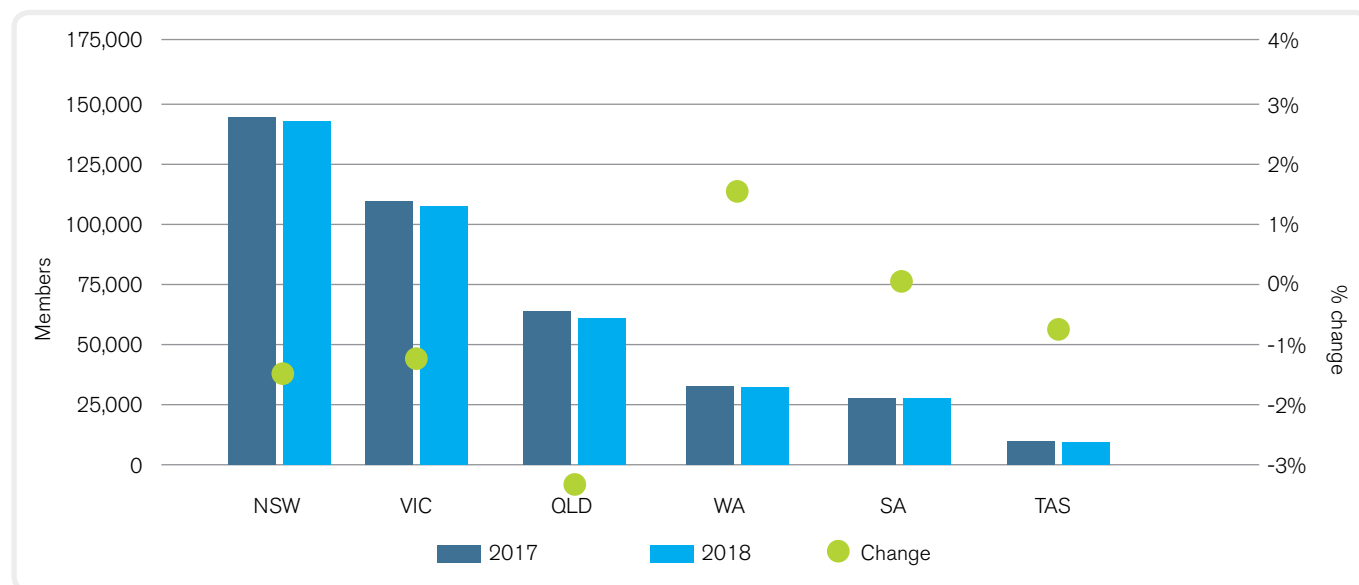


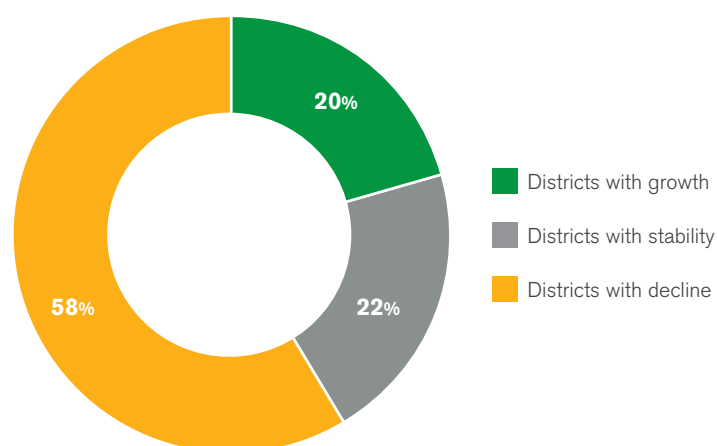
Chart 6 – 2018 results by state



Source: Golf Australia & member golf associations

In aggregating all golf districts reported across the six states, a total of 74 markets emerge. 20% of these districts experienced membership growth over 2017, 22% reported stable outcomes and 58% reported declines.

Chart 7 – Change in members by district in 2018



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. Northern Territory is reported as one district.

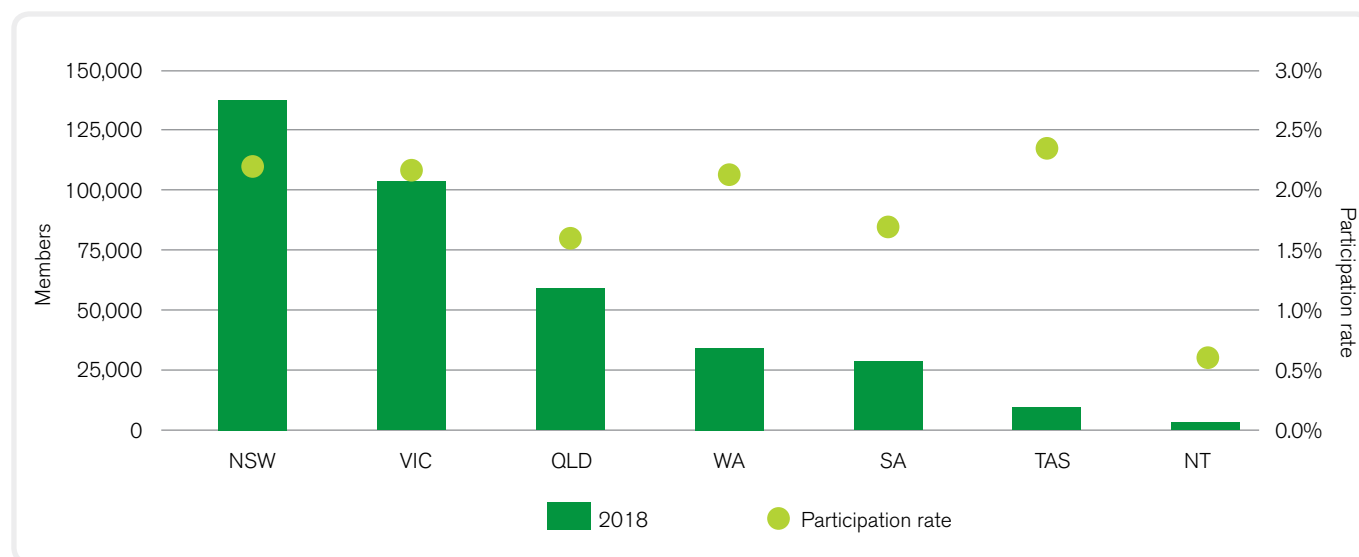
Districts with growth and decline exhibit more than 1% movement from 2017.

04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Adult participation rate

Charts 8 and 9 illustrate registered golfers by state and region as a percentage of each state or region's total population. The participation rate for adults (18 years and above) across Australia is 1.9%. Participation rates above the national average were recorded in New South Wales, Victoria, Western Australia and Tasmania.

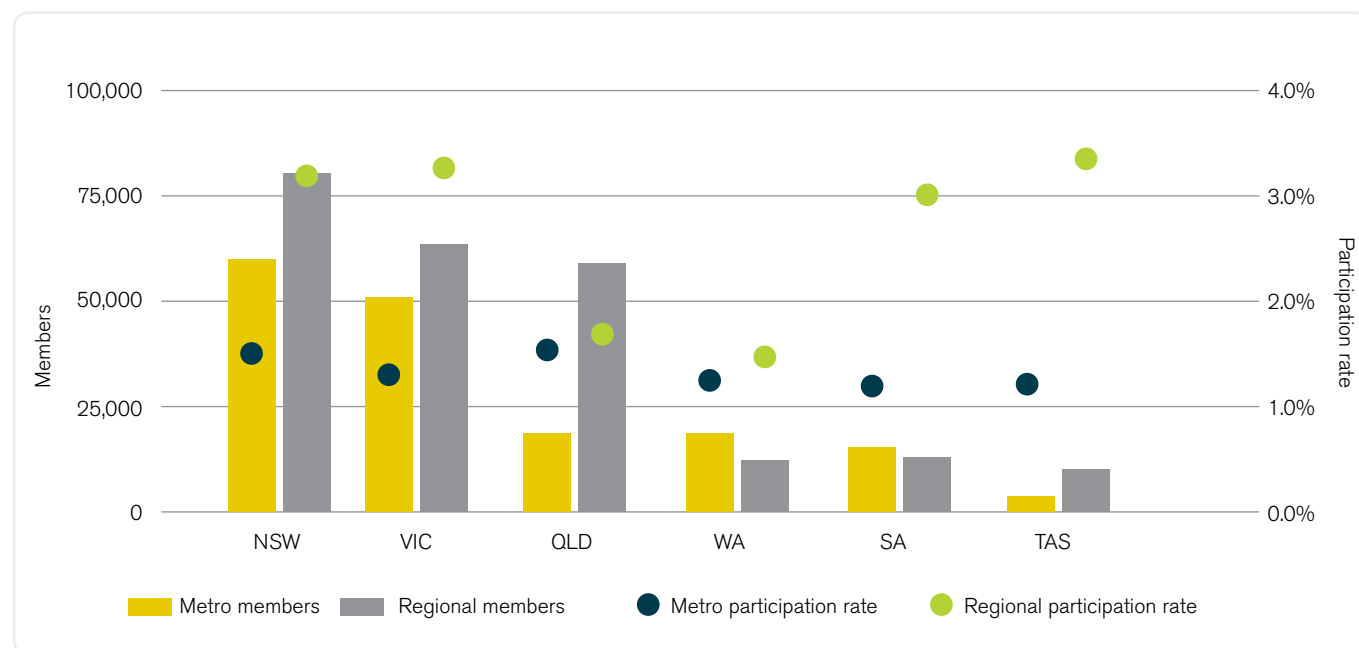
Chart 8 – Adult participation rate by state



Source: Golf Australia, member golf associations & Australian Bureau of Statistics

The average participation rate within regional areas is 2.4%, materially higher than the average 1.4% recorded for metropolitan areas (including social club members). Regional participation rates of over 3% are evident in New South Wales, Victoria, South Australia and Tasmania.

Chart 9 – Participation rate, metropolitan and regional



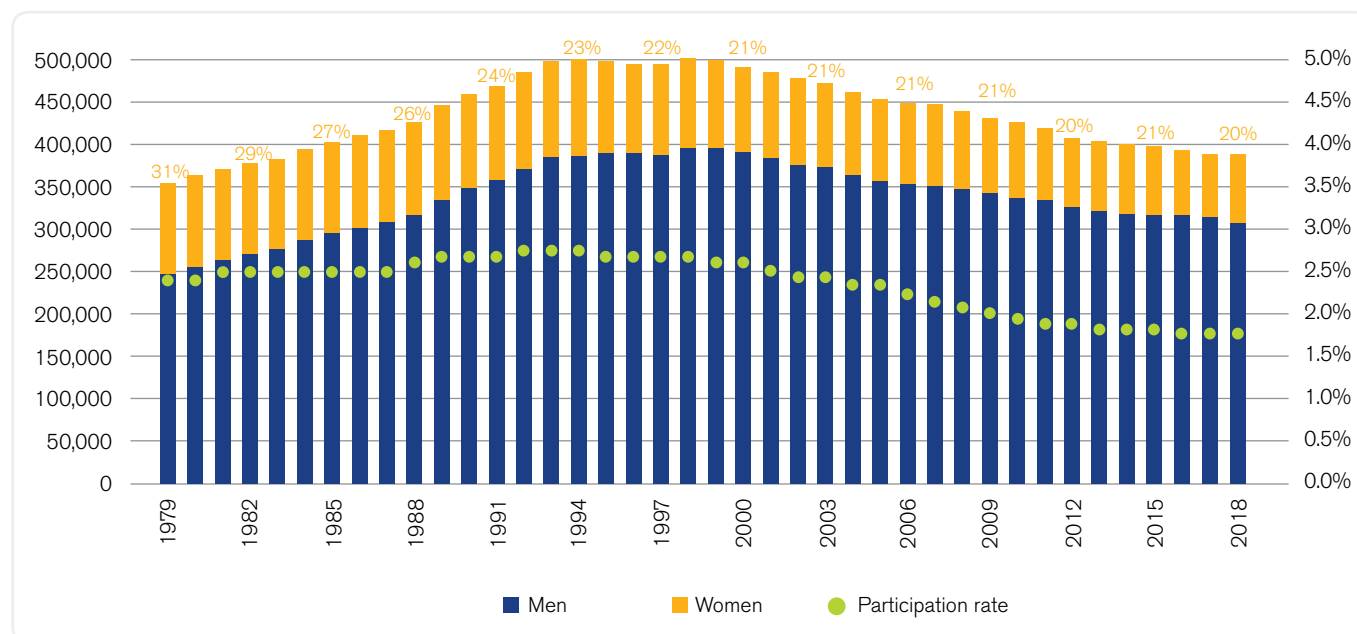
Source: Golf Australia, member golf associations & Australian Bureau of Statistics

04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Historical trends

History shows that club membership numbers peaked in Australia in 1998 at approximately 500,000 golfers. Since then, a steady decline has materialised averaging 1.3% per annum over the period. There has also been a decline in the proportion of female members, from a high of 31% in 1979 down to the current level at 20% in 2018.

Chart 10 – Historical participation



Source: Golf Australia, Australian Bureau of Statistics

In the more recent five-year period, there has been an average annual decline of 0.8% in club membership demand. While there was an average annual increase of 1.3% in South Australia over this period, a decline was evident in other states ranging from 0.5% in Western Australia to 1.9% for the Northern Territory.

Table 4 – Five-year member numbers

State						% Change	
	2014	2015	2016	2017	2018	1 Year	5 Year
NSW	149,855	149,023	146,174	144,261	142,197	-1.4%	-1.0%
VIC	111,026	110,519	111,266	109,280	107,144	-2.0%	-0.7%
QLD	65,282	65,262	63,754	63,784	61,502	-3.6%	-1.2%
WA	33,627	33,439	33,198	32,347	32,848	1.5%	-0.5%
SA	25,909	25,822	26,734	27,651	27,667	0.1%	1.3%
TAS	11,131	10,729	10,729	10,311	10,238	-0.7%	-1.7%
NT	2,216	2,313	2,172	2,037	2,017	-1.0%	-1.9%
Metropolitan	154,466	153,794	152,353	150,691	149,420	-0.8%	-0.7%
Regional	224,847	222,383	220,101	216,692	212,047	-2.1%	-1.2%
Social	19,733	20,930	21,583	22,288	22,146	-0.6%	2.3%
Overall	399,046	397,107	394,037	389,671	383,613	-1.6%	-0.8%

Source: Golf Australia, member golf associations

04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Playing Members - Results and Trends (cont)

Metropolitan Golf Clubs

The overall national movement for metropolitan clubs was a decline of 0.8%, slightly higher than the average annual decline of 0.7% recorded over the past five years. Western Australia was the only state to record an increase in metropolitan member numbers (1.8%), with all other states experiencing a declines ranging from -0.3% (NSW) to -4.1% (SA).

Table 5 – Metropolitan Golf Club member numbers

State	2014	2015	2016	2017	2018	% Change	
						1 Year	5 Year
NSW	63,515	63,251	62,072	61,097	60,903	-0.3%	-0.8%
VIC	43,782	44,265	44,201	43,831	43,452	-0.9%	-0.2%
QLD	15,113	14,653	14,737	14,904	14,532	-2.5%	-0.8%
WA	16,730	16,457	16,235	15,545	15,818	1.8%	-1.1%
SA	13,153	12,990	12,902	13,074	12,534	-4.1%	-1.0%
TAS	2,173	2,178	2,206	2,240	2,181	-2.6%	0.1%
Overall	154,466	153,794	152,353	150,691	149,420	-0.8%	-0.7%

Source: Golf Australia, member golf associations

Regional Golf Clubs

The overall national movement for regional clubs was a decline of 2.1%, more than double the decline recorded in metropolitan markets and twice the average annual decline over the past five years. Western Australia was the only state to record an increase in regional member numbers (0.3%), with all other states experiencing a declines ranging from 1.0% (NT) to 3.6% (QLD).

Table 6 – Regional Golf Club member numbers

State	2014	2015	2016	2017	2018	% Change	
						1 Year	5 Year
NSW	86,340	85,772	84,102	83,164	81,294	-2.2%	-1.2%
VIC	54,532	53,159	54,485	53,284	52,563	-1.4%	-0.7%
QLD	50,016	50,184	48,646	48,449	46,684	-3.6%	-1.4%
WA	11,737	11,355	11,370	10,935	10,973	0.3%	-1.3%
SA	11,071	11,073	10,827	10,658	10,488	-1.6%	-1.1%
TAS	8,935	8,527	8,499	8,040	8,028	-0.1%	-2.1%
NT	2,216	2,313	2,172	2,037	2,017	-1.0%	-1.9%
Overall	224,847	222,383	220,101	216,567	212,047	-2.1%	-1.2%

Source: Golf Australia, member golf associations

04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Playing Members - Results and Trends (cont)

Social Clubs

There was a small decline in social club members of 0.6%. There has been steady growth over the past five-year period, representing an average annual increase of 2.3%. Given this growth, and the declines recorded in traditional clubs, social club members now account for 5.8% of total club members across Australia, up from 4.9% in 2014.

Table 7 – Social club member numbers

State	2013	2014	2015	2016	2018	% Change	
						1 Year	5 Year
VIC	12,712	13,095	12,590	12,165	11,129	-8.5%	-2.6%
QLD	153	425	371	306	286	-6.5%	13.3%
WA	5,160	5,627	5,593	5,867	6,057	3.2%	3.3%
SA	1,685	1,759	3,005	3,919	4,645	18.5%	22.5%
TAS	23	24	24	31	29	-6.5%	4.7%
Overall	19,733	20,930	21,583	22,288	22,146	-0.6%	2.3%

Source: Golf Australia, member golf associations

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



Photo: Queensland Outback Masters

04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Playing Members - Results and Trends (cont)

Male members

Reported male members declined by 1.8%, representing almost the entire total annual result. Over the past five years, the average annual decline was slightly lower at 0.7%. Declines of 0.7% and 2.6% respectively were reported in male numbers in metropolitan and regional clubs. Western Australia and South Australia were the only states to report an increase in male member numbers (1.2% and 1.0% respectively).

Table 8 – Male member numbers

State	2014	2015	2016	2017	2018	% Change	
						1 Year	5 Year
NSW	119,669	119,476	117,747	115,860	114,371	-1.3%	-0.9%
VIC	86,778	86,539	88,212	86,591	84,544	-2.4%	-0.5%
QLD	52,473	52,481	51,219	51,413	48,810	-5.1%	-1.4%
WA	26,319	26,309	26,056	25,418	25,724	1.2%	-0.5%
SA	20,816	20,726	21,636	22,485	22,712	1.0%	1.8%
TAS	9,153	8,865	8,952	8,532	8,498	-0.4%	-1.5%
NT	1,850	1,910	1,810	1,713	1,660	-3.1%	-2.1%
Metropolitan	124,779	124,110	123,489	122,077	121,254	-0.7%	-0.6%
Regional	176,451	175,238	174,319	171,467	167,046	-2.6%	-1.1%
Social	15,828	16,958	17,824	18,468	18,019	-2.4%	2.6%
Overall	317,058	316,306	315,632	312,012	306,319	-1.8%	-0.7%

Source: Golf Australia, member golf associations

Female members

Female member numbers declined by 0.3%, the smallest annual decline recorded since 2010. Queensland (+3.6%), Western Australia and Northern Territory all experienced a net increase in member numbers for 2018.

Table 9 – Female member numbers

State	2014	2015	2016	2017	2018	% Change	
						1 Year	5 Year
NSW	30,186	29,547	28,427	28,401	27,826	-2.0%	-1.6%
VIC	24,248	23,980	23,064	22,689	22,600	-0.4%	-1.4%
QLD	12,809	12,781	12,535	12,246	12,692	3.6%	-0.2%
WA	7,308	7,130	7,142	6,929	7,124	2.8%	-0.5%
SA	5,093	5,096	5,098	5,166	4,955	-4.1%	-0.5%
TAS	1,978	1,864	1,777	1,779	1,740	-2.2%	-2.5%
NT	366	403	362	324	357	10.2%	-0.5%
Metropolitan	29,687	29,684	28,864	28,614	28,166	-1.6%	-1.0%
Regional	48,396	47,145	45,782	45,100	45,001	-0.2%	-1.4%
Social	3,905	3,972	3,759	3,820	4,127	8.0%	1.1%
Overall	81,988	80,801	78,405	77,534	77,294	-0.3%	-1.2%
% of total	20.5%	20.3%	19.9%	19.9%	20.1%		

Source: Golf Australia, member golf associations

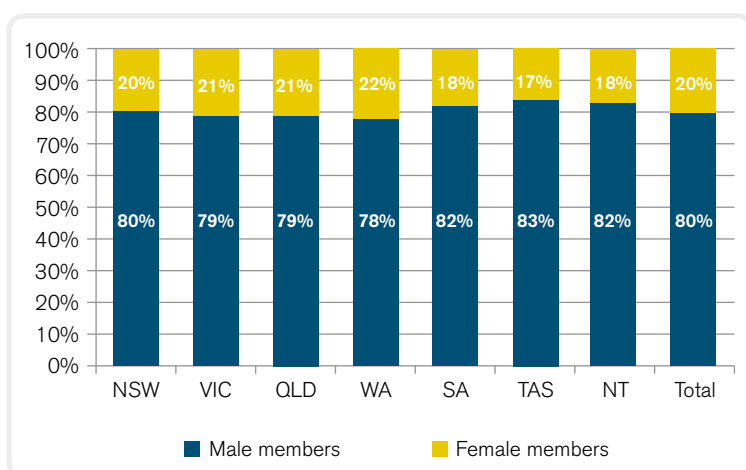
04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Playing Members - Results and Trends (cont)

Female members (cont)

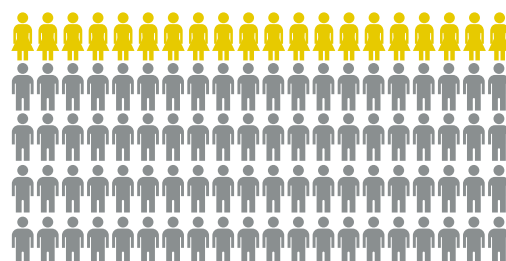
While there was minimal movement in female numbers, the gender mix in 2018 stays as it was in 2017 – 80% male, 20% female. Western Australia has the highest percentage of female members at 22%, and Tasmania the lowest at 17%.

Chart 11 – Gender proportion by state



Source: Golf Australia, member golf associations

20%
female share of
membership base



04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Junior members

Junior members (under the age of 18) totalled 12,778, representing a decline of 5.5% over 2017. Similar levels of decline were evident for metropolitan and regional clubs. By gender, junior male and female numbers declined by 7.7% and 6.9% respectively.

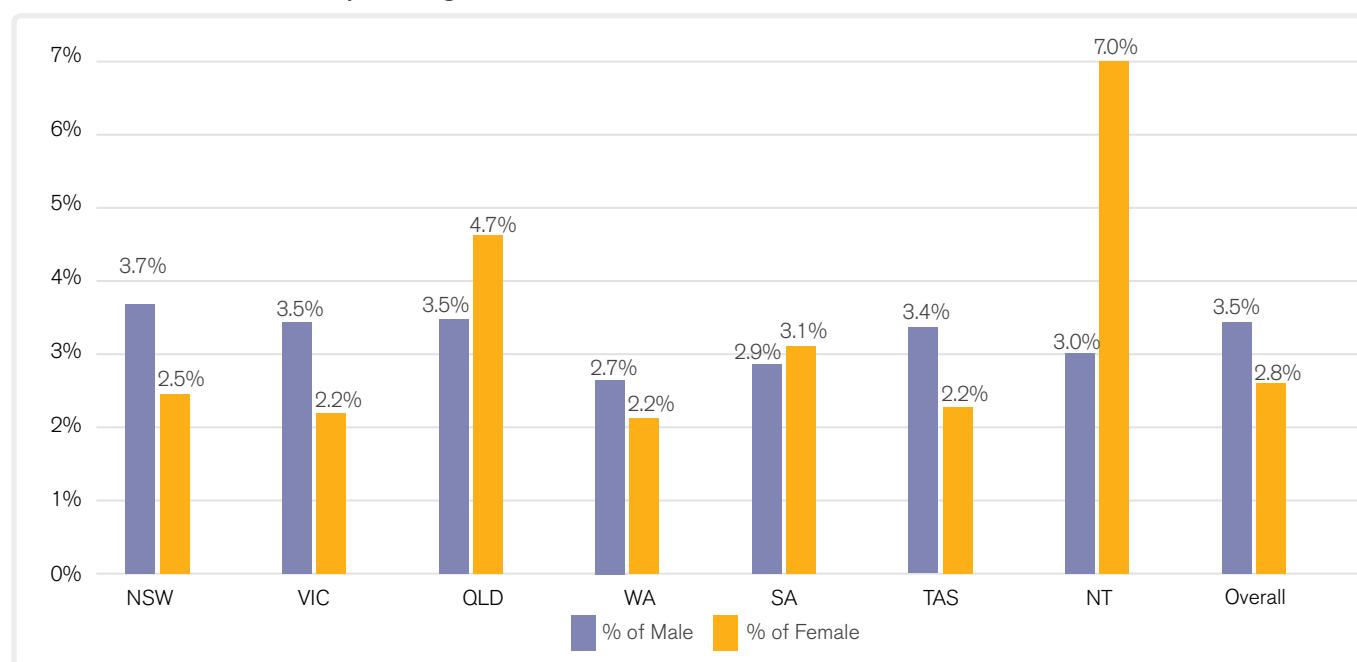
Table 10 – Junior members by state

State	2014	2015	2016	2017	2018	% Change	
						1 Year	5 Year
NSW	6,092	5,823	5,654	5,349	4,929	-7.9%	-4.1%
VIC	3,839	3,755	3,804	3,597	3,438	-4.4%	-2.2%
QLD	2,060	2,182	2,225	2,442	2,331	-4.5%	2.5%
WA	820	885	915	878	854	-2.7%	0.8%
SA	748	729	786	848	821	-3.2%	1.9%
TAS	369	300	328	328	330	0.6%	-2.2%
NT	82	88	84	82	75	-8.5%	-1.8%
Metropolitan	5,793	5,667	5,117	4,979	4,727	-5.1%	-4.0%
Regional	8,195	8,075	8,576	8,439	7,929	-6.0%	-0.7%
Social	22	20	103	106	122	15.1%	40.9%
Male	11,877	11,592	11,706	11,486	10,599	-7.7%	-2.3%
Female	2,133	2,170	2,090	2,038	2,179	6.9%	0.4%
Overall	14,010	13,762	13,796	13,524	12,778	-5.5%	-1.8%
% of total	3.5%	3.5%	3.5%	3.5%	3.3%		

Source: Golf Australia, member golf associations

Junior members represent 3.3% of total members. By gender, male juniors represent a slightly higher proportion of total males than junior females do of total females; 3.5% compared to 2.8%.

Chart 12 – Junior members as percentage of total members

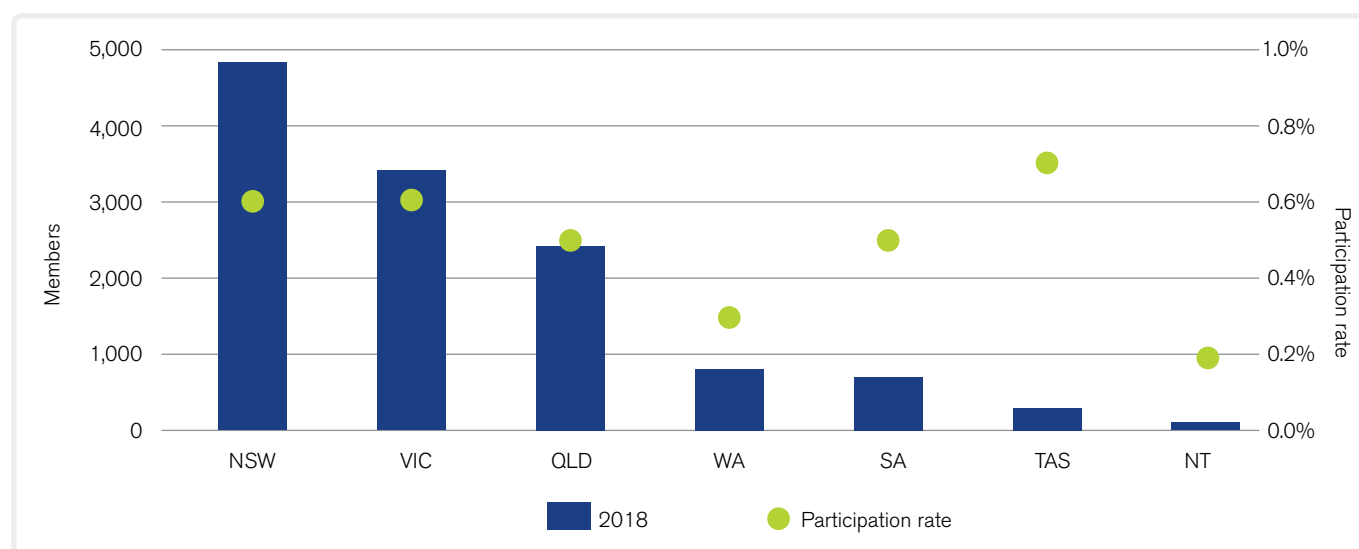


Source: Golf Australia

Junior participation rate

The participation rate for juniors across Australia is 0.5%, significantly lower than the 1.9% for adults. Participation rates above the national average were recorded in New South Wales, Victoria and Tasmania.

Chart 13 – Junior participation rate by state



Source: GOLF Link, AusPlay

MyGolf

MyGolf is Australia's national junior introductory program to develop and promote participation in golf. The MyGolf program is designed for 5 to 12 year olds and is the major driver of junior golf participation in Australia. MyGolf participation numbers for the past five years are summarised in Table 11.

Table 11 – MyGolf participation numbers

State	2014-15	2015-16	2016-17	2017-18	2018-19	% Change	
						1 Year	5 Year
NSW	550	1,290	1,806	3,523	4,117	16.9%	49.6%
VIC	1,273	1,982	3,191	4,805	4,682	-2.6%	29.8%
QLD	720	1,486	2,254	4,660	10,024	115.1%	69.3%
WA	343	695	827	1,695	1,718	1.4%	38.0%
SA	308	571	954	1,121	1,361	21.4%	34.6%
TAS	128	61	405	752	906	20.5%	47.9%
NT	158	169	237	281	377	34.2%	19.0%
Overall	3,480	6,254	9,674	16,837	23,185	37.7%	46.1%

Source: Golf Australia

04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

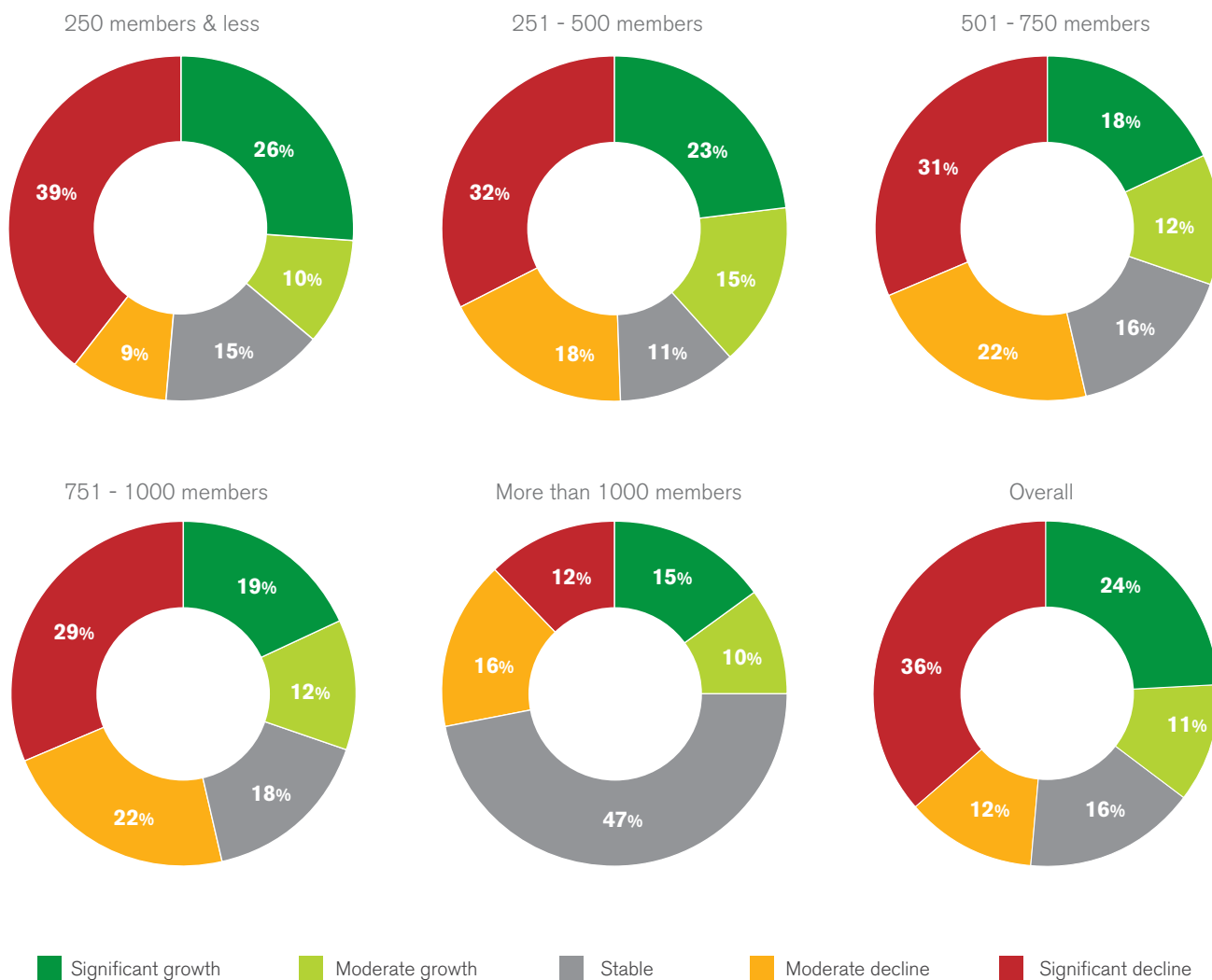
Level of membership movement

35% of clubs experienced a net increase in membership numbers with 24% experiencing growth in excess of 5%. This compares to 48% experiencing some decline in numbers and 36% having a decline of greater than 5%. 16% of clubs had stable numbers in 2018.



Stable clubs are defined subject to size. For clubs with 500 members or less, stable is defined as experiencing a change in member numbers of less than +/-2% from the prior year. For clubs with between 500 and 750, +/-1.5% movement is considered stable. For clubs with over 1,000 members +/-1% movement is considered stable. "Significant growth / decline" is defined as greater than 5% for all clubs.

Chart 14 – Level of movement by club size



Source: Golf Australia, member golf associations

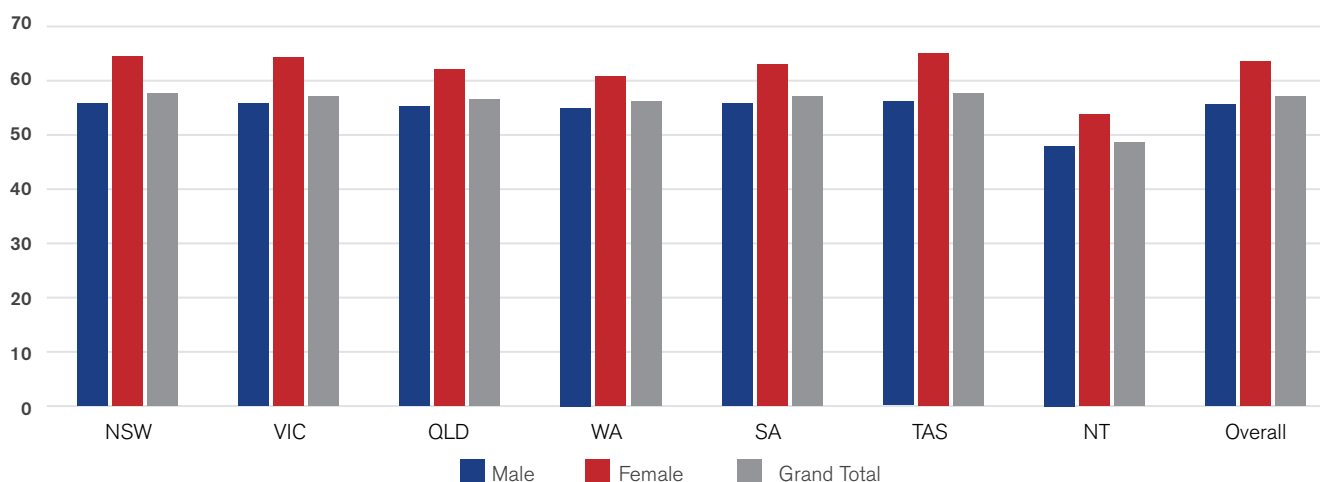
04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Playing Member Age Profile

Average age

The average reported age of club members across Australia is 57 years. Little variation is evident across different states (with the exception of the Northern Territory). In terms of gender, the average age of male members is 56 years, eight years younger than the average female age of 64 years.

Chart 15 – Average age by state



Source: GOLF Link

Age distribution

The following chart illustrates the current mix of club members compared to the broader national population above 10 years. Evidencing golf's appeal to the older age cohorts, it shows a material portion of club members in the 60 to 74 year cohort - 34% of male members and 50% of female members - versus a lower national population share of this cohort of only 17%.

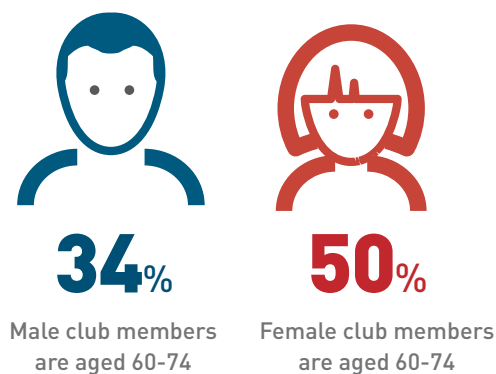
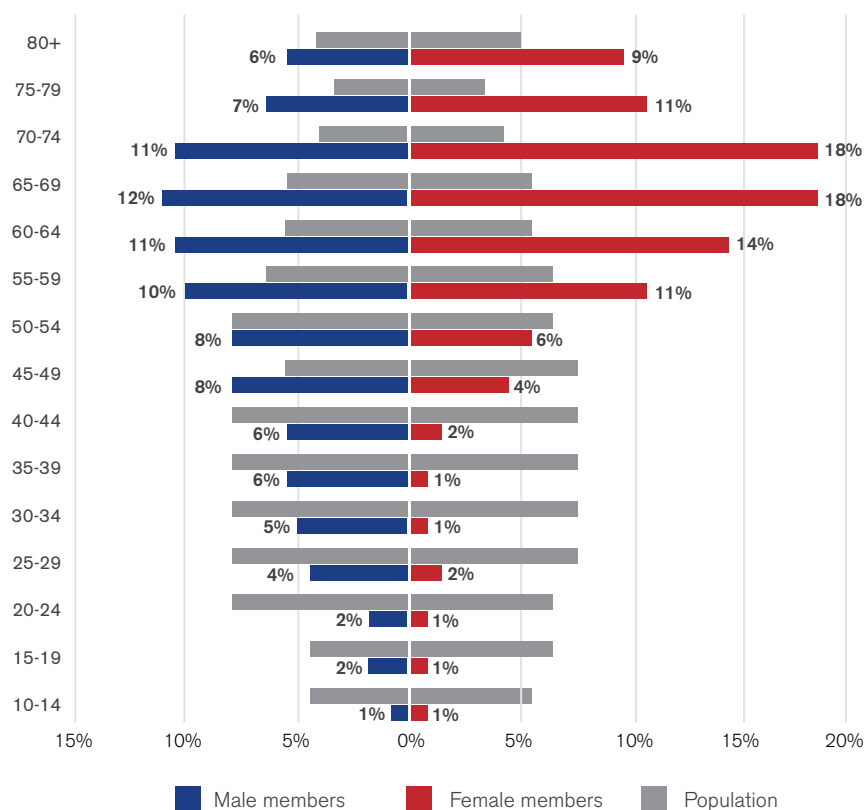


Chart 16 – Age distribution by gender



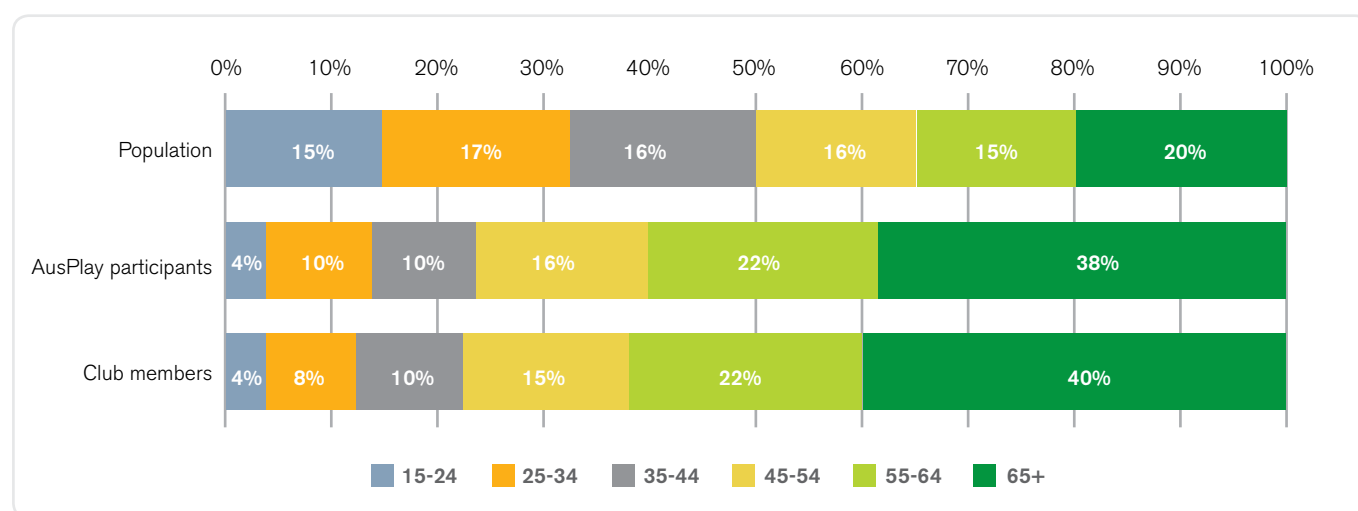
Source: GOLF Link

04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Age distribution (cont)

To provide context for the data in Chart 16, below data from AusPlay is reintroduced to compare the age distribution of club golfers to golfers who participated at least once in the 12-month period. A similar age profile is evident for club members and more general golf participants, with a slightly greater share in the 65+ age category for club members (40%) than more general participants (38%).

Chart 17 – Age distribution for population, general golf participants and club members



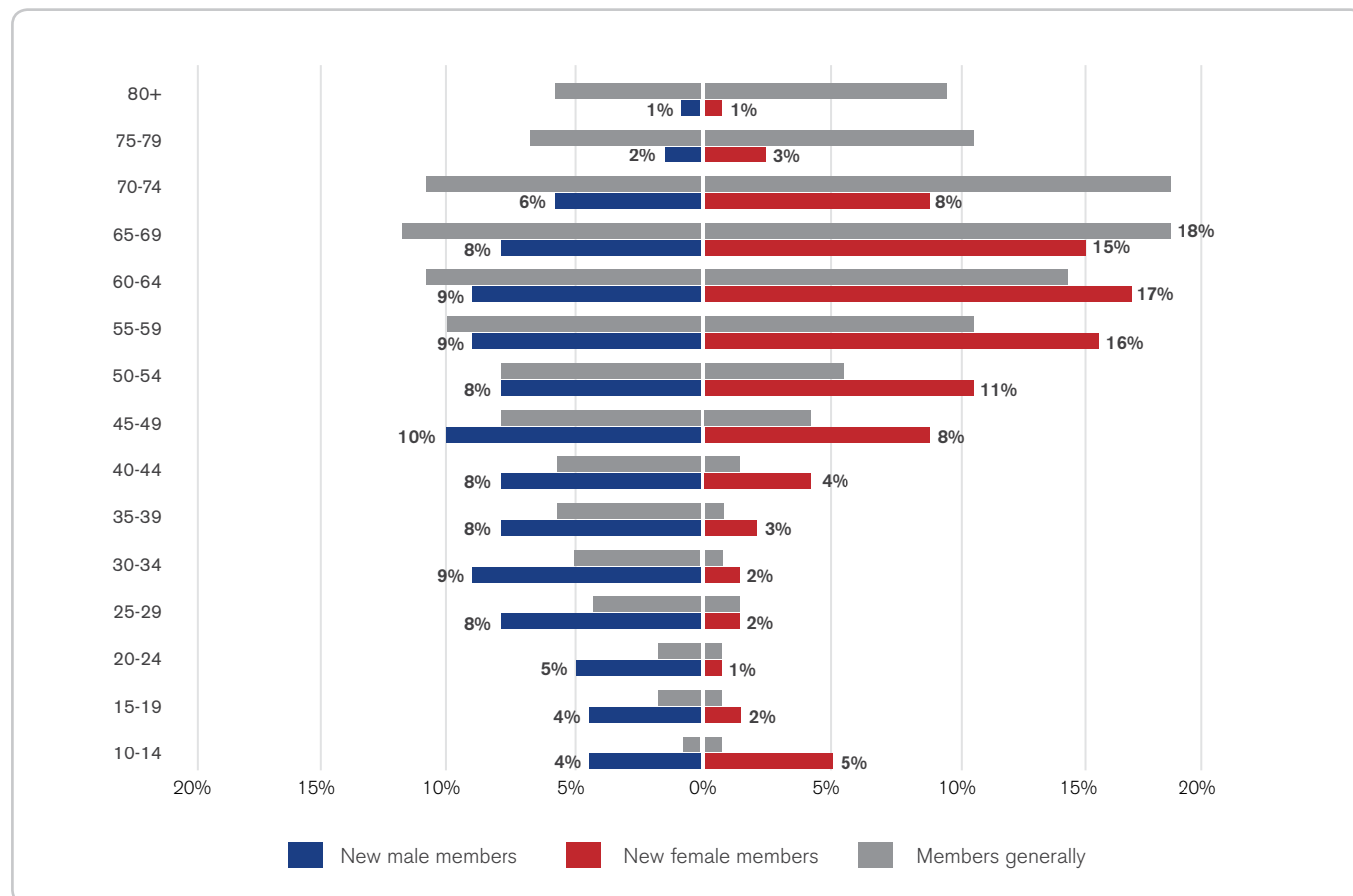
Source: GOLF Link, AusPlay

04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

New member age profile

New members to club golf show a younger age profile than is evident for club members generally.. In 2018 56% of new males and 28% of new females were under the age of 50 compared to 35% and 13% respectively across all members.

Chart 18 – New member age pyramid, compared to members generally



Source: Golfink

05 STATE MEMBERSHIP OUTCOMES

New South Wales

5 of the 21 districts in NSW experienced a net increase in membership numbers. The greatest gains were evident for the Lower North Coast at 3.2% and the Hunter River at 2.0%. Losses of greater than 5% were evident in Far South Coast, Blue Mountains, New England, Western and Western Riverina. A loss of over 10.4% was experienced in the Central Coast.

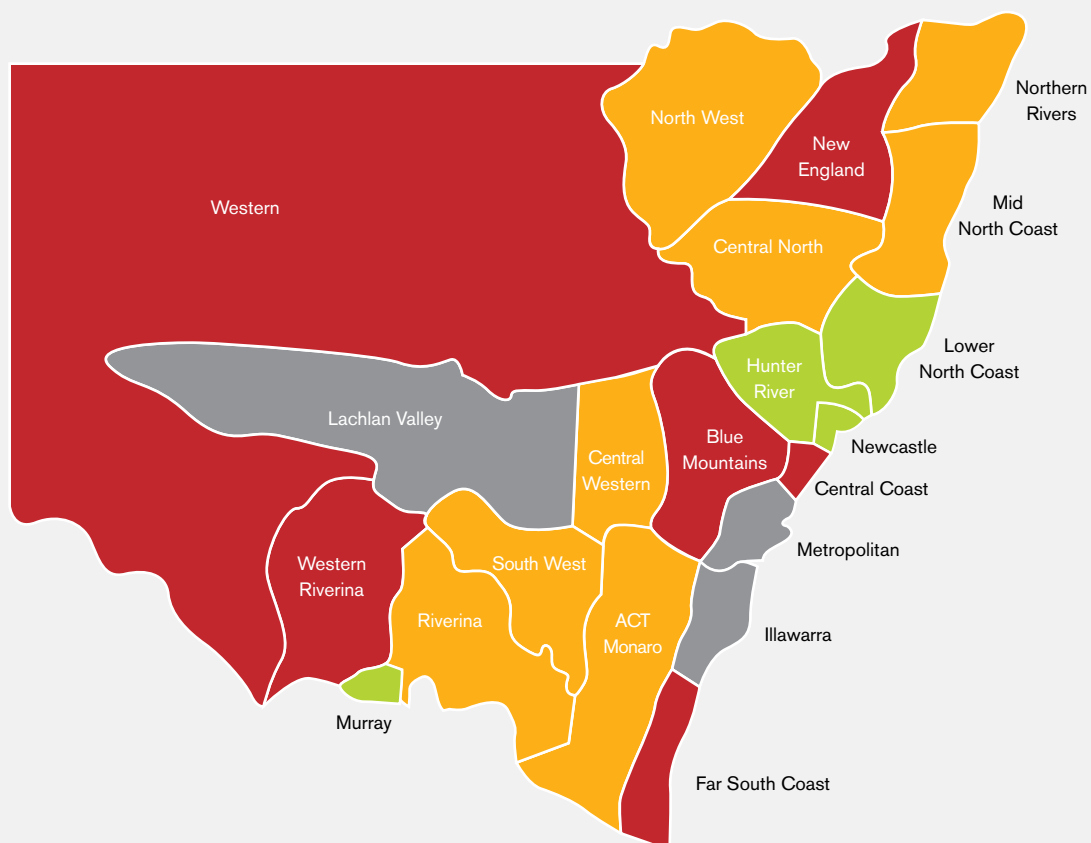
Table 12

Region	2014	2015	2016	2017	2018	% Change	
						1 Year	5 Year
Lower North Coast	4,728	4,806	4,710	4,628	4,775	3.2%	0.2%
Hunter River	4,216	4,191	3,848	3,941	4,021	2.0%	-0.9%
Murray	4,984	5,619	6,315	7,027	7,151	1.8%	7.5%
Newcastle	8,795	8,885	8,621	8,460	8,569	1.3%	-0.5%
Illawarra	9,344	9,175	8,820	8,372	8,454	1.0%	-2.0%
Metropolitan	63,515	63,251	62,072	61,097	60,903	-0.3%	-0.8%
Lachlan Valley	914	884	854	827	822	-0.6%	-2.1%
Riverina	1,935	1,760	1,681	1,762	1,740	-1.2%	-2.1%
ACT-Monaro	8,963	9,092	8,855	8,369	8,169	-2.4%	-1.8%
Central North	2,710	2,599	2,626	2,422	2,364	-2.4%	-2.7%
Mid North Coast	5,532	5,161	4,531	4,476	4,352	-2.8%	-4.7%
Central Western	3,484	3,628	3,598	3,542	3,431	-3.1%	-0.3%
Northern Rivers	7,798	7,643	7,650	7,582	7,344	-3.1%	-1.2%
South West	1,373	1,407	1,318	1,291	1,243	-3.7%	-2.0%
North West	1,055	1,080	1,116	1,016	976	-3.9%	-1.5%
Far South Coast	5,471	5,321	5,171	5,403	5,060	-6.3%	-1.5%
Blue Mountains	2,562	2,332	2,288	2,136	1,990	-6.8%	-4.9%
New England	1,541	1,426	1,428	1,431	1,333	-6.8%	-2.9%
Western	1,985	2,056	2,005	1,862	1,733	-6.9%	-2.7%
Western Riverina	1,830	1,765	1,673	1,569	1,452	-7.5%	-4.5%
Central Coast	7,120	6,942	6,994	7,048	6,315	-10.4%	-2.4%
NSW Total	149,855	149,023	146,174	144,261	142,197	-1.4%	-1.0%

NSW Golf Association

05 STATE MEMBERSHIP OUTCOMES (CONT)

New South Wales - (Cont)



% Change in membership numbers from 2017 to 2018:

- > 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)

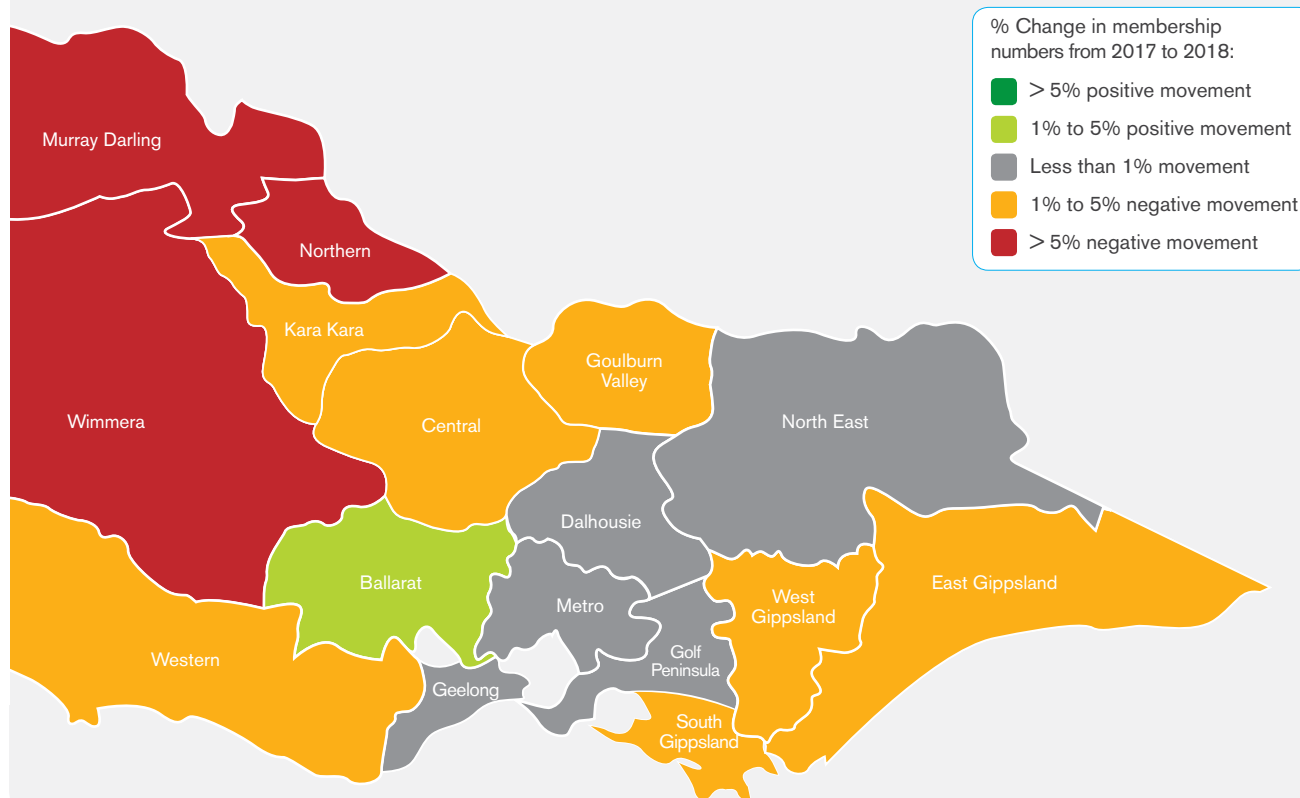
Victoria

4 of the 16 districts in Victoria experienced an increase in member numbers in 2018. The greatest gain was evident in Ballarat at +3.2%, well in advance of any other district. Losses of greater than 5% were evident in Murray Darling, Wimmera and the Northern districts.

Table 13

Region	2014	2015	2016	2017	2018	% Change	
						1 Year	5 Year
Ballarat	3,480	3,371	3,398	3,294	3,398	3.2%	-0.5%
Geelong	10,558	10,084	10,472	10,562	10,626	0.6%	0.1%
Golf Peninsula	7,165	6,734	7,356	7,263	7,304	0.6%	0.4%
Dalhousie	2,107	2,014	1,991	1,930	1,936	0.3%	-1.7%
North East	5,372	5,057	5,348	4,850	4,817	-0.7%	-2.2%
Metropolitan	43,782	44,265	44,201	43,831	43,452	-0.9%	-0.2%
Western	3,859	3,649	3,466	3,408	3,360	-1.4%	-2.7%
Goulburn Valley	4,891	4,465	4,878	4,772	4,695	-1.6%	-0.8%
Central	2,684	2,817	2,754	2,615	2,556	-2.3%	-1.0%
South Gippsland	2,473	2,291	2,474	2,416	2,341	-3.1%	-1.1%
West Gippsland	3,314	3,488	3,437	3,569	3,458	-3.1%	0.9%
Kara Kara	455	460	451	402	389	-3.2%	-3.1%
East Gippsland	2,634	2,579	2,502	2,474	2,377	-3.9%	-2.0%
Murray Darling	2,135	2,713	2,514	2,326	2,174	-6.5%	0.4%
Wimmera	2,035	2,059	2,008	1,902	1,772	-6.8%	-2.7%
Northern	1,370	1,378	1,436	1,501	1,360	-9.4%	-0.1%
VIC Total	97,877	97,015	98,291	96,727	95,642	-1.1%	-0.5%

Victorian Golf Association



05 STATE MEMBERSHIP OUTCOMES (CONT)

Queensland

5 of the 14 districts in Queensland experienced a net increase in membership numbers. The greatest increase was evident for Far North Queensland at 9.5%. Losses of greater than 5% were evident in South East Queensland and the Central Highlands district. With the closure of one club and the withdraw of a membership offer at another, the Gold Coast market reported the largest decline of 15%.

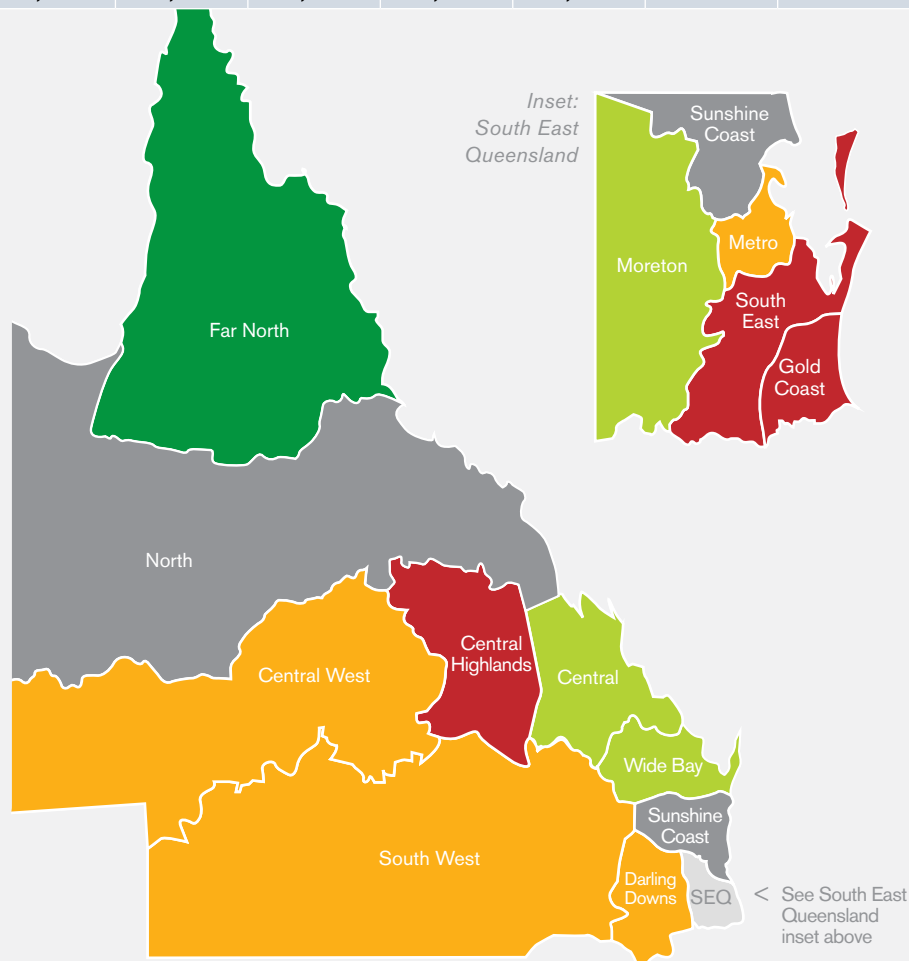
Table 14

Region	2014	2015	2016	2017	2018	% Change	
						1 Year	5 Year
Far North Qld	3,204	3,032	2,952	2,773	3,037	9.5%	-1.1%
Wide Bay	3,198	3,242	3,103	3,027	3,083	1.9%	-0.7%
Central Qld	3,105	3,272	3,121	2,972	3,005	1.1%	-0.7%
Moreton	2,087	2,200	2,011	2,016	2,038	1.1%	-0.5%
Sunshine Coast	12,582	12,587	12,435	12,710	12,664	-0.4%	0.1%
North Qld	4,536	4,274	4,108	4,175	4,154	-0.5%	-1.7%
Central West	244	270	267	244	238	-2.5%	-0.5%
Metropolitan	15,113	14,653	14,737	14,904	14,532	-2.5%	-0.8%
South West Qld	847	811	799	720	692	-3.9%	-4.0%
Darling Downs	3,706	3,839	3,749	3,699	3,546	-4.1%	-0.9%
South East Qld	4,352	4,465	4,835	4,864	4,571	-6.0%	1.0%
Central Highlands	1,307	1,382	1,285	1,180	1,096	-7.1%	-3.5%
Gold Coast	10,848	10,810	9,981	10,069	8,560	-15.0%	-4.6%
QLD Total	65,129	64,837	63,383	63,353	61,216	-3.4%	-1.2%

Queensland Golf Association

% Change in membership numbers from 2017 to 2018:

- > 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 net increase in member numbers. The best performing markets were Goldfields and Kimberley both experiencing net increases in excess of 8%. The metropolitan market of Perth was the only metropolitan area across Australia to record a net increase in membership numbers, this being 1.8% over 2017.

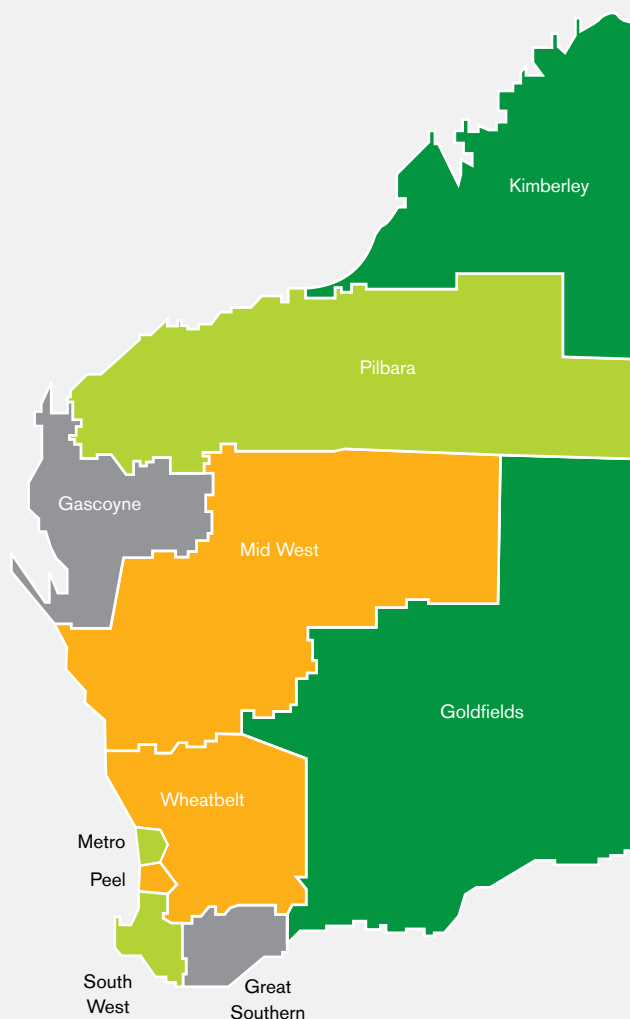
Table 15

Region	2014	2015	2016	2017	2018	% Change	
						1 Year	5 Year
Goldfields	1,011	975	892	793	862	8.7%	-3.1%
Kimberley	448	451	410	380	411	8.2%	-1.7%
Pilbara	486	422	423	391	402	2.8%	-3.7%
Metropolitan	16,730	16,457	16,235	15,545	15,818	1.8%	-1.1%
South-West	4,199	3,943	4,029	3,997	4,041	1.1%	-0.8%
Great Southern	1,305	1,301	1,394	1,380	1,381	0.1%	1.1%
Gascoyne	131	130	132	117	117	0.0%	-2.2%
Mid West	1,164	1,017	1,084	999	972	-2.7%	-3.5%
Wheat	2,299	2,399	2,241	2,193	2,132	-2.8%	-1.5%
Peel	694	717	765	685	655	-4.4%	-1.2%
WA Total	28,467	27,812	27,605	26,480	26,791	1.2%	-1.2%

Western Australian Golf Association

% Change in membership numbers from 2017 to 2018:

- > 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

In 2018 2 of the 9 districts in South Australia experienced a net increase in membership numbers, led by the Riverland region at +0.8%.

Table 16

Region	2014	2015	2016	2017	2018	% Change	
						1 Year	5 Year
Riverland	631	590	528	516	520	0.8%	-3.8%
Mid North	1,404	1,384	1,421	1,421	1,423	0.1%	0.3%
Murraylands	728	702	665	609	607	-0.3%	-3.6%
Northern	990	952	960	914	902	-1.3%	-1.8%
Southern	3,534	3,607	3,449	3,427	3,380	-1.4%	-0.9%
South Eastern	1,667	1,630	1,650	1,671	1,631	-2.4%	-0.4%
Eyre	1,179	1,226	1,182	1,081	1,051	-2.8%	-2.3%
Metropolitan	13,153	12,990	12,902	13,074	12,534	-4.1%	-1.0%
Yorke	938	982	972	1,019	974	-4.4%	0.8%
SA Total	24,224	24,063	23,729	23,732	23,022	-3.0%	-1.0%

South Australian Golf Association



% Change in membership numbers from 2017 to 2018:

- > 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

In 2018 the Southern Country district was the only one of four districts in Tasmania to report a net increase in member numbers, +2.9% over 2017.

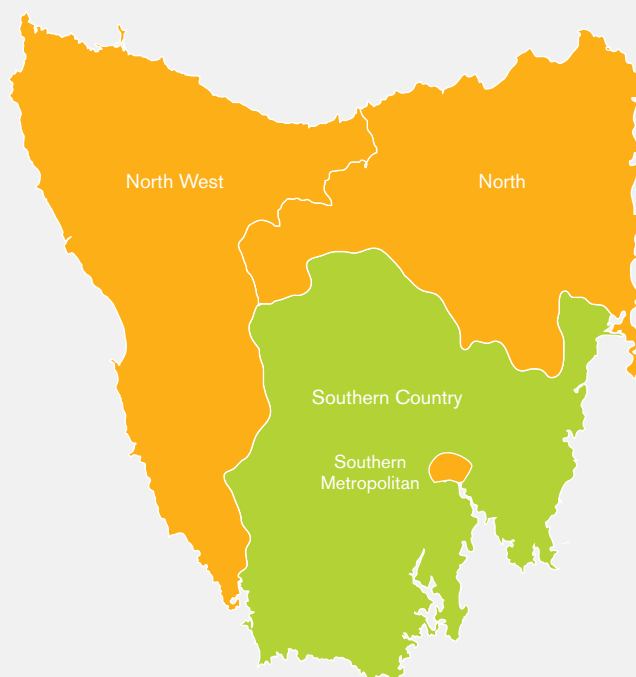
Table 17

Region	2014	2015	2016	2017	2018	% Change	
						1 Year	5 Year
Southern Country	3,029	2,909	2,865	2,744	2,823	2.9%	-1.4%
North	3,468	3,270	3,316	3,141	3,104	-1.2%	-2.2%
North West	2,438	2,348	2,318	2,155	2,101	-2.5%	-2.9%
Southern Metropolitan	2,173	2,178	2,206	2,240	2,181	-2.6%	0.1%
TAS Total	11,108	10,705	10,705	10,280	10,209	-0.7%	-1.7%

Golf Australia

% Change in membership numbers from 2017 to 2018:

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



06 COMPETITION ROUNDS

Competition Rounds Summary

For the same club dataset there were 10.322 million competition rounds played in 2018, a 1.5% increase over 2017. Most states experienced growth in rounds, with a decline evident only in South Australia and Tasmania. 5-year total rounds data from GOLFLink is summarised in Table 18.

Table 18 – Total competition rounds

State	2014	2015	2016	2017	2018	% Change	
						1 Year	5 Year
NSW	3,842,696	3,704,712	3,753,522	3,744,474	3,832,677	2.4%	-0.1%
VIC	2,631,925	2,668,061	2,625,957	2,660,547	2,700,500	1.5%	0.5%
QLD	1,748,120	1,720,256	1,810,934	1,757,163	1,780,779	1.3%	0.4%
WA	928,076	948,412	946,441	952,444	958,180	0.6%	0.6%
SA	734,296	743,580	733,285	742,212	739,189	-0.4%	0.1%
TAS	268,147	272,036	256,225	269,623	266,894	-1.0%	-0.1%
NT	44,773	42,570	42,438	40,064	43,440	8.4%	-0.6%
Metropolitan	4,325,980	4,293,630	4,319,031	4,306,180	4,374,865	1.6%	0.2%
Regional	5,539,524	5,473,468	5,504,802	5,503,205	5,578,354	1.4%	0.1%
Social	332,529	332,529	344,969	357,142	368,440	3.2%	2.1%
Overall	10,198,033	10,099,627	10,168,802	10,166,527	10,321,659	1.5%	0.2%

Source: GOLF Link, Golf Australia

Note: Above round counts are based on a same club dataset and thus differ slightly from the total rounds played figure of 10.496m as reported by Golf Australia.

Given an increase in total rounds played and a reported decline in membership numbers, average annual rounds played on a per member thus increased in 2018 from 26.1 to 26.9 rounds.

On a state basis, average playing frequency is greatest in Western Australia and South Australia, both with over 30 rounds per member annually. Average frequency is slightly higher for metropolitan clubs at 29.3 rounds compared to regional clubs at 26.3 rounds per annum. 5-year average rounds data from GOLF Link in summarised in Table 19.

Table 19 – Average annual competition rounds

State	2014	2015	2016	2017	2018	% Change	
						1 Year	5 Year
NSW	25.6	24.9	25.7	26.0	27.0	3.8%	1.0%
VIC	26.8	27.4	26.6	27.4	28.1	2.7%	1.0%
QLD	26.8	26.5	28.6	27.7	29.1	5.1%	1.6%
WA	32.6	34.1	34.3	36.0	35.8	-0.6%	1.9%
SA	30.3	30.9	30.9	31.3	32.1	2.7%	1.2%
TAS	24.1	25.4	23.9	26.2	26.1	-0.3%	1.6%
NT	20.2	18.4	19.5	19.7	21.5	9.5%	1.3%
Metropolitan	28.0	27.9	28.3	28.6	29.3	2.5%	0.9%
Regional	24.6	24.6	25.0	25.4	26.3	3.6%	1.3%
Social	16.9	15.9	16.0	16.0	16.6	3.8%	-0.3%
Overall	25.6	25.4	25.8	26.1	26.9	3.1%	1.0%

Source: GOLF Link, Golf Australia

07 PROGRAM PARTICIPANTS, EVENTS, DELIVERERS & OFFICIALS

Table 20 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 20

CATEGORY	2013/14 ACTUAL	2014/15 ACTUAL	2015/16 ACTUAL	2016/17 ACTUAL	2017/18 ACTUAL
Golfers					
Playing Members	399,046	397,107	394,037	389,671	383,613
Rounds of Golf					
Club Competition Rounds	10,198,033	10,099,627	10,168,802	10,166,527	10,321,659
Program Participants					
MyGolf National Junior Program	939	3,480	6,254	9,674	16,837
Other Non-MyGolf Junior Programs	12,577	10,586	11,696	11,299	8,951
Qantas Golf Club		35,486	121,080	125,740	
Other Casual Golf Programs	7,027	3,268	6,595	4,531	4,563
Indigenous	1,458	1,687	1,888	1,728	1,358
Disability	2,224	2,645	5,956	8,195	12,174
Female	12,536	7,363	6,380	11,535	10,572
Seniors	14,063	4,068	3,595	4,327	5,896
New Formats		6,342	29,032	40,540	48,464
Swing Fit			430	640	685
Other programs	2,576	1,305	1,370	2,966	1,500
	53,400	76,230	194,276	221,175	111,000
Event Entries (Men/Women/Mixed/Jnrs)					
Member Association State & Territory Events	50,894	56,798	57,573	50,504	47,735
Junior Foundation Events	7,696	9,232	8,215	9,516	7,932
Golf Australia National Events	1,665	1,545	1,631	1,653	1,598
PGA Events	93,829	96,656	82,944	84,515	90,585
ALPG Events	959	952	1,123	969	1,143
	155,043	165,183	151,486	147,157	148,993
School Delivered Programs Participants					
MyGolf Schools 1 (primary) program	56,499	52,404	47,819	46,956	47,418
MyGolf Schools 1 (primary) "tasters"	36,781	26,631	28,202	14,980	10,565
AASC/Sporting Schools Golf Program	16,035	8,292	18,124	21,409	23,000
MyGolf Schools 2 (secondary) program	22,748	19,619	16,049	21,060	22,418
MyGolf Schools 2 (secondary) "tasters"	1,518	518	595	220	401
Other Non-MyGolf School Programs	7,991	7,053	7,214	6,293	6,298
	141,572	114,517	118,003	110,918	110,100

Note: 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.

07 PROGRAM PARTICIPANTS, EVENTS, DELIVERERS & OFFICIALS (CONT)

Table 20 (cont)

CATEGORY	2013/14 ACTUAL	2014/15 ACTUAL	2015/16 ACTUAL	2016/17 ACTUAL	2017/18 ACTUAL
School Managed Competitions Participants					
SSA 12 Yrs & Under Championship	3,698	4,623	3,668	3,985	3,912
SSA 19 Yrs & Under Championship	1,639	1,503	1,724	1,506	1,524
	5,337	6,126	5,392	5,491	5,436
Program Deliverers & Officials					
Development Personnel	34	34	40	37	42
Community Golf Instructors	1,728	1,699	1,496	1,167	1,094
AASC/Sporting Schools Golf Coaches	502	419	182	374	401
PGA Coaches	1,562	1,652	1,662	1,648	1,679
ALPG Coaches	57	72	84	90	98
Rules Officials	4,796	4,563	4,736	4,769	4,767
Course Raters	248	157	96	20	15
	8,927	8,596	8,296	8,105	8,096

Note: 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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