

# 2020 National Golf Participation Summary



2020 AusPlay Survey  
July 2021

# Introduction

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*July 2020*

Results from the latest (2020) Ausplay National Participation Survey have recently been released by Sport Australia. The release is the 7<sup>th</sup> in the series since the survey was resurrected and the first to include the Covid-19 period. Noting the already reported growth in club membership demand and member competition rounds, the annual data presented is a valuable reference point for understanding overall participation levels in golf.

With a consistent time series data available, we are able to determine the trends that are apparent at not only the high level but into key sub-segments – state, gender, age and frequency of play.

We've examined the data and present the following analysis.

Regards,

Jeff Blunden

*Golf Business Advisory Services*

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# Key Trends - all Sports



- Participation increases recorded in all singular based activities/sports for 2020.
- Fitness / Wellness related activities (Pilates & Yoga) continue on a significant upward trajectory with growth of 27% over the prior 12 month period and 67% increase over last 4 periods.
- Golf, Cycling, Tennis and Basketball all recorded annual increases of over 20%.
- Team based sports have generally been more impacted by Covid-19, with lower growth or declines (netball) recorded over 2019.

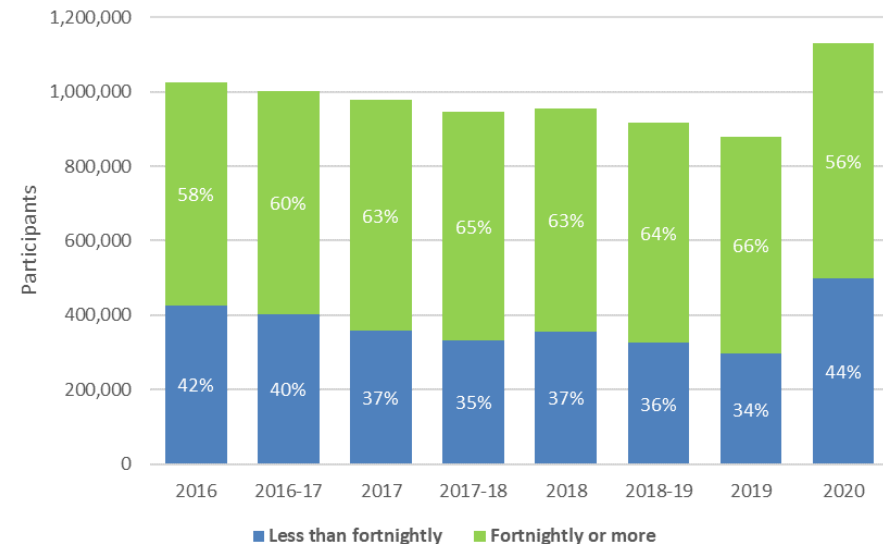
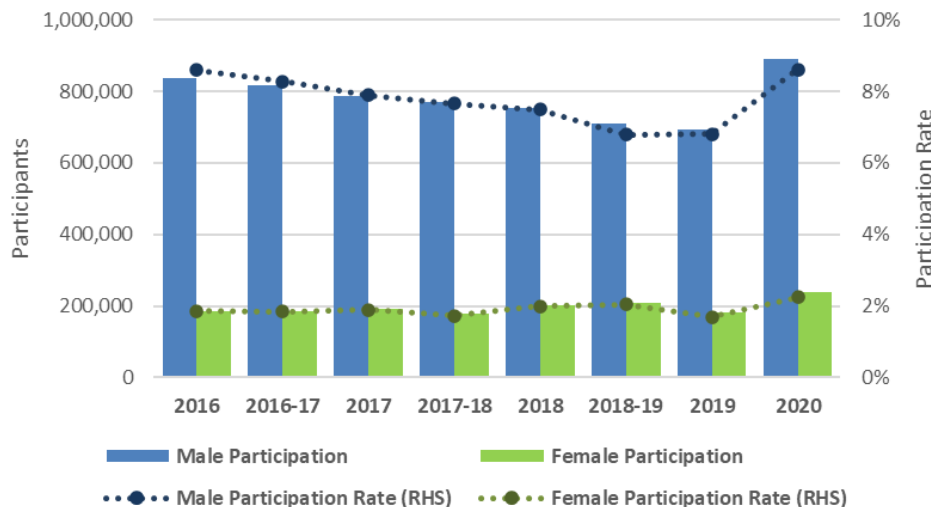
	2016	2017	2018	2019	2020	% change 2020 v 2019	LongTerm Trend
<i>Estimate (000s)</i>							
Walking (Recreational)	8,649.0	8,516.2	9,145.3	8,959.9	9,880.8	10%	
Bush walking	1,198.5	1,158.0	1,165.6	1,309.6	1,804.1	38%	
Fitness/Gym	6,479.6	6,764.4	7,131.9	7,591.7	7,866.8	4%	
Athletics (incl jogging/running)	3,105.0	3,071.9	3,086.0	3,406.5	4,174.8	23%	
<b>Sub total</b>	<b>19,432.1</b>	<b>19,510.5</b>	<b>20,528.8</b>	<b>21,267.7</b>	<b>23,726.5</b>	<b>12%</b>	
Swimming	2,908.5	2,918.0	3,128.2	3,249.5	3,591.5	11%	
Cycling	2,325.6	2,250.9	2,381.0	2,376.6	2,998.9	26%	
Football/soccer	1,143.6	1,108.5	1,006.2	1,086.3	1,158.0	7%	
Tennis	926.4	922.7	885.1	854.9	1,046.4	22%	
Golf	1,024.9	978.6	955.9	877.9	1,130.5	29%	
Basketball	689.2	707.1	700.8	765.4	918.9	20%	
Netball	603.1	592.2	517.3	681.5	596.2	-13%	
Australian football	499.9	468.6	584.9	550.2	570.7	4%	
Surfing	514.2	482.1	480.1	523.7	600.2	15%	
<b>Sub total</b>	<b>10,635.4</b>	<b>10,428.7</b>	<b>10,639.5</b>	<b>10,966.0</b>	<b>12,611.4</b>	<b>15%</b>	
Yoga	876.0	939.7	1,090.4	1,119.2	1,460.1	30%	
Pilates	497.3	577.3	678.8	696.1	827.6	19%	
<b>Sub total</b>	<b>1,373.3</b>	<b>1,517.0</b>	<b>1,769.2</b>	<b>1,815.3</b>	<b>2,287.7</b>	<b>26%</b>	

Source: Ausplay 2016 - 2020

# Golf Overall Participation

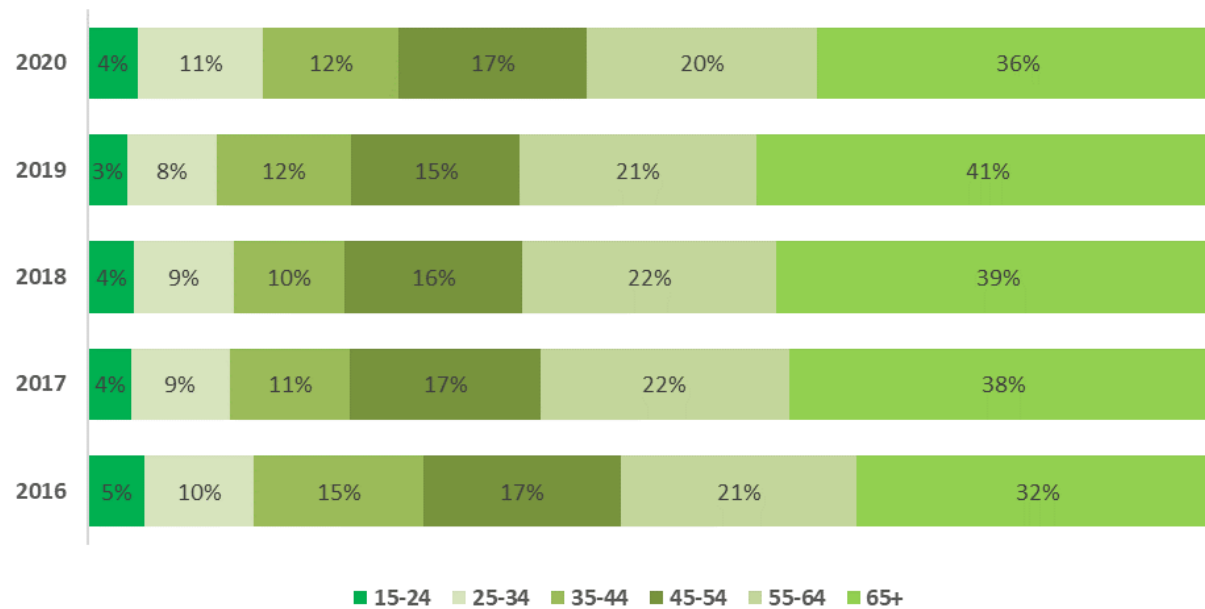


- With eight survey periods completed for AusPlay, longer term participation trends can be established.
- Reversing the year on year trend seen since 2016, Golf recorded an annual increase of 29% over 2019, with an additional 252,000 people playing the game in the last 12 month period.
- Male participation increased to 8.6% of the population (over 15), with female participation increasing to 5.4%.
- Female participation has risen from 18% share of total market in 2016 to 21% in 2020.
- Evidencing an increase of new golfers into the game, 44% of participants played less than fortnightly



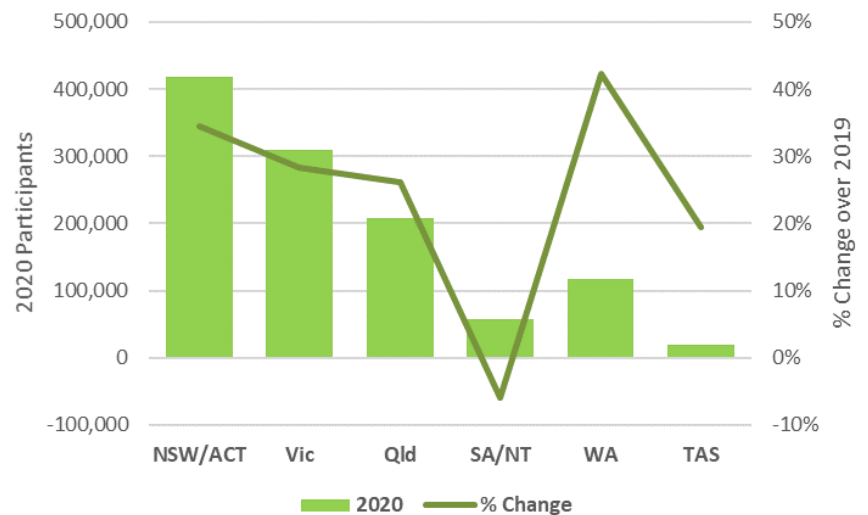
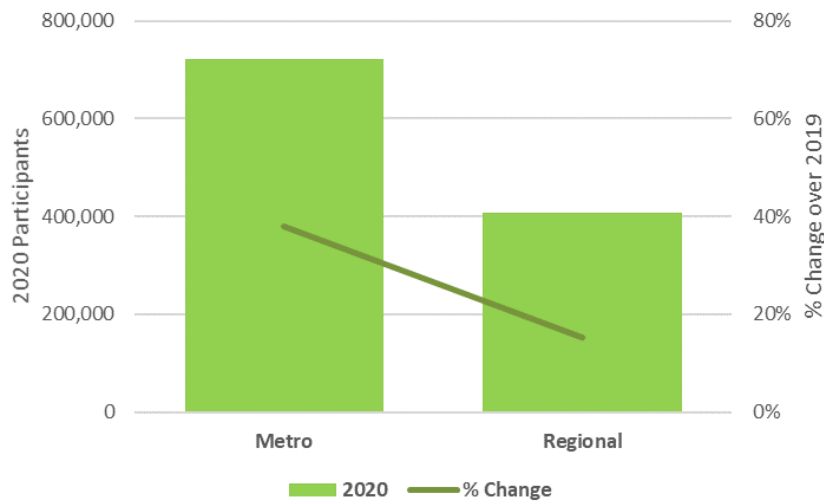
# Golf by Age

- During 2020 golf experienced an expansion within the 25-34 and 45-54 year playing cohorts.
- In 2020 Sub 45 year golfers accounted for 44% of the total playing mix, up from 38% in 2019, representing approximately 100,000 golfers.
- Whilst reducing in % share, the 55 year plus cohort remain the key market for golf, representing 56% of total demand in 2020, near 630,000 total golfers, growing by near 90,000 over 2019.



# Golf by Region

- The 2020 increase in participation of 29% is a result clearly driven by the lifestyle impacts of the Covid-19 pandemic.
- The increase in golf participation was generally more evident in the metropolitan markets, growing by 40% over 2019, compared to approximately 20% in regional markets.
- The increase in golf participation was generally consistent across most states, less so for SA/NT.



# About Golf Business Advisory Services

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Golf Business Advisory Services (GBAS) is a specialist independent advisory company providing dedicated, professional advice around the business of golf within the Asia Pacific region. Offering unrivalled experience and industry insight, our approach is grounded in research with a belief that data analysis always reveals the insights required to drive your business.

GBAS has serviced an enviable and broad client base over the past 19 years, with completed engagements spanning the full spectrum of the industry. Specialist services offered by GBAS include:

- Strategic planning
- Operational reviews
- Member research
- Board presentations
- Consumer and market research
- Feasibility studies
- Asset oversight
- Due diligence
- Asset valuation
- Expert witness services

If you have a need in the golf industry GBAS is able to provide you with all of the necessary knowledge and experience required to help ensure you achieve your goals.

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