



National Golf Participation Summary

2018/19 AusPlay Survey

November 2019

Introduction

November 2019

Dear Reader

In late October the results of the latest (2018/19) Ausplay National Participation Survey were released. The 6th release in the series since the survey was resurrected by the ASC, the annual data presented is a valuable reference point for understanding overall participation levels in golf.

With three years of now 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 – gender, region and age.

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

Regards,

Jeff Blunden

Golf Business Advisory Services

www.golfbas.com

Key Trends - all Sports

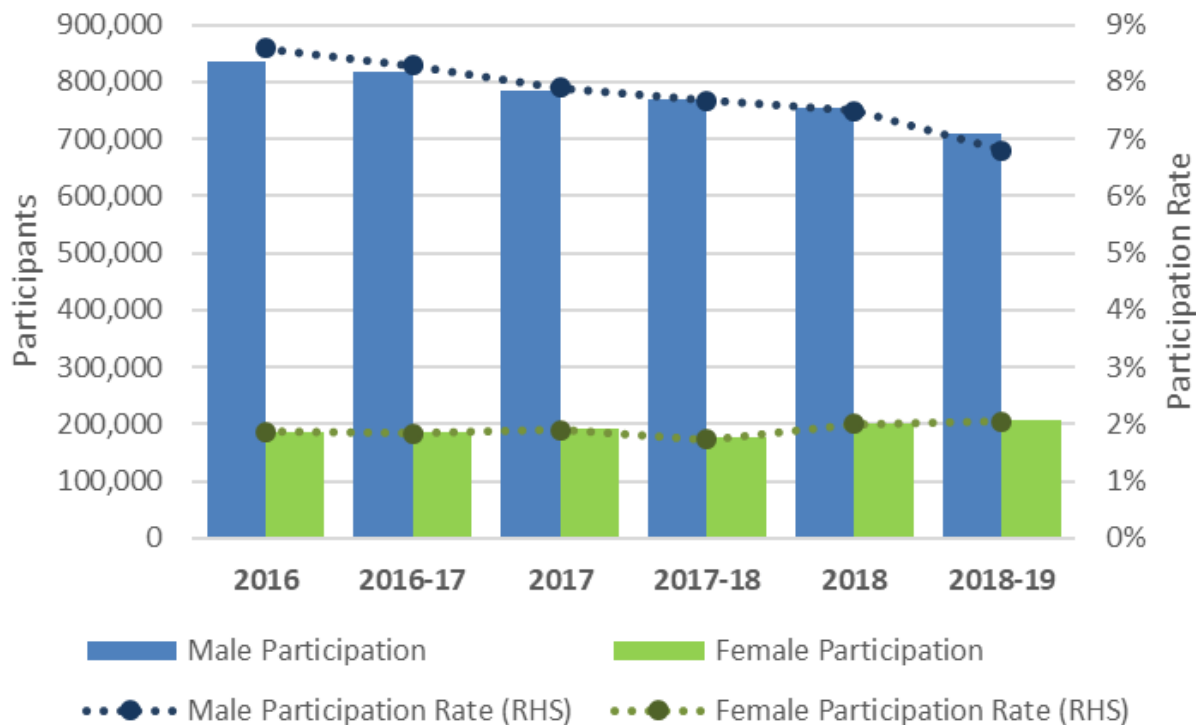
- Participation increases recorded in a number of activities/sports for 2018/19.
- Fitness / Wellness related activities continue on an upward trajectory – +22% increase over last 3 periods for Pilates & Yoga, +11% for Fitness & Gym.
- Swimming, Cycling, Basketball, AFL all record increases.
- Traditional sports of Golf, and Cricket record year over year declines.

	2016-17 FY	2017-18 FY	2018-19 FY	% change
	<i>Estimate (000s)</i>			
Walking (Recreational)	8,655.6	8,895.3	8,968.1	4%
Bush walking	1,252.2	1,078.1	1,167.2	-7%
Fitness/Gym	6,618.2	6,960.6	7,366.7	11%
Athletics (incl jogging/ running)	3,026.3	3,075.7	3,292.3	9%
Sub total	19,552.3	20,009.7	20,794.3	6%
Swimming	3,009.6	2,952.0	3,139.7	4%
Cycling	2,284.0	2,319.1	2,368.2	4%
Football/soccer	1,129.9	1,030.0	1,084.2	-4%
Tennis	926.0	853.3	918.2	-1%
Golf	1,002.7	945.9	916.9	-9%
Basketball	724.4	686.6	753.7	4%
Netball	622.3	544.5	615.4	-1%
Australian football	502.5	514.6	587.9	17%
Cricket	534.3	535.3	495.7	-7%
Sub total	10,735.7	10,381.3	10,879.9	7%
Pilates	554.4	622.3	679.0	22%
Yoga	905.8	980.8	1,100.9	22%
Sub total	1,460.2	1,603.1	1,779.9	44%

Source: Ausplay 2016/17 - 2018/19

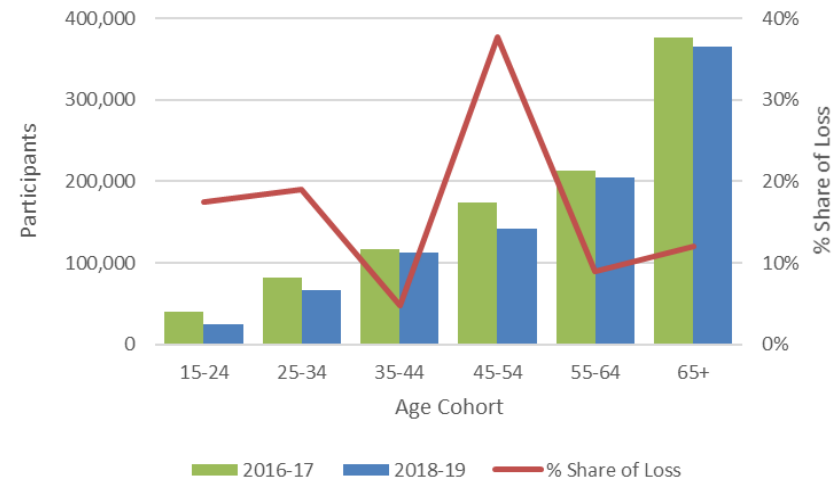
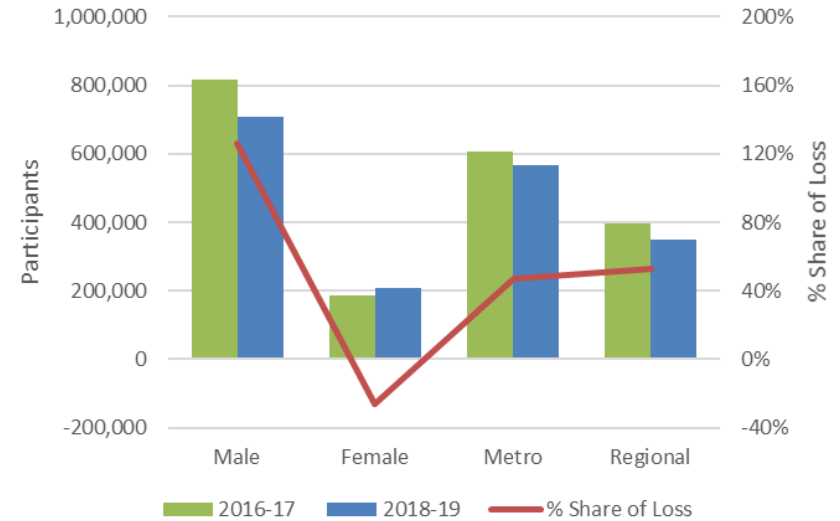
Key Findings - Golf

- With six survey periods complete for AusPlay, longer term trends can be established.
- Golf participation trend direction is consistent across both calendar year and financial year periods.
- All decline is sourced to male gender.
- Male participation rate has fallen for 8.6% to 6.8% (of population aged >15 Yrs)
- Female participation has risen from 18% share of total market in 2016 to 23% in 2018-19.



Key Findings - Golf

- 917,000 golfers reported for 2018/19, a 9% decline over 2016/17.
- Overall participation rate in golf (population aged 15 years +) measured at 4.4%, down from 5% in 2016/17.
- Male participation averaging 6.8%, reaching 9% for 65 yr + cohort.
- All decline is sourced to male gender as female demand grows by 12% since 2016/17.
- Gender mix moved to 77% male / 23% female, up from 81%/19%.
- Slightly higher declines recorded in regional areas (11%) vs 7% decline for total metropolitan market.
- Near 40% of total decline from 45-54 age cohort, 60% from 45 year + cohort



Data Tables

	Population Participation										
	Total	Male	Female	Metro	Regional	15-24	25-34	35-44	45-54	55-64	65+
2016-17	1,002,720	817,110	185,610	608,081	394,639	40,674	82,618	116,502	174,595	212,532	375,799
2017-18	945,939	768,743	177,196	611,226	334,713	37,135	95,289	91,461	153,872	204,079	364,102
2018-19	916,874	708,811	208,063	567,537	349,338	25,609	66,347	112,372	142,181	204,853	365,511

Movement											
2016-17 / 2018-	-85,846	-108,299	22,453	-40,544	-45,301	-15,065	-16,271	-4,130	-32,414	-7,679	-10,288
% Share of Loss	126%	-26%	47%	53%	18%	19%	5%	38%	9%	12%	

	Population Participation Rate										
	Total	Male	Female	Metro	Regional	15-24	25-34	35-44	45-54	55-64	65+
2016-17	5.0%	8.3%	1.8%	4.6%	6.0%	1.3%	2.3%	3.5%	5.4%	7.5%	10.0%
2017-18	4.7%	7.7%	1.7%	4.6%	4.8%	1.2%	2.5%	2.7%	4.7%	7.0%	9.4%
2018-19	4.4%	6.8%	2.0%	4.2%	5.0%	0.8%	1.8%	3.3%	4.4%	6.9%	9.1%
Pt change	-0.6	-1.5	0.2	-0.4	-1.0	-0.5	-0.5	-0.2	-1.0	-0.6	-0.9

	% of Golf Population										
	Male	Female	Metro	Regional	15-24	25-34	35-44	45-54	55-64	65+	
2016-17	81%	19%	61%	39%	4%	8%	12%	17%	21%	37%	
2017-18	81%	19%	65%	35%	4%	10%	10%	16%	22%	38%	
2018-19	77%	23%	62%	38%	3%	7%	12%	16%	22%	40%	

Source: Ausplay 2016/17 - 2018/19

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- Due diligence
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