Golf Australia

GMA
Golf Management Australia

2015
Golf Club Participation Report

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01 KEY FINDINGS

Golf Australia, in conjunction with the Golf Management Australia (GMA), is pleased to present to you the 2015 National Golf Club Participation Report.

The key findings from 2015 are outlined below:

- National membership numbers across Australia were reported as 397,063 golfers. This result marked a 0.5% decline on numbers reported for the prior 12-month period, equating to a loss of 1,983 individual members.
- Overall movement for metropolitan clubs for the year was a decline of 0.4%, which compares favourably to the 1.3% decline for regional clubs.
- When assessed by gender, a slight decline of 0.2% was apparent for males whilst for females, a larger decline of 1.5% was evident. Given the larger proportional decline in members in 2015, females now account for 20% of national members – a 1% decline from 2014.
- In 2015, 34% (35% in 2014) of clubs experienced a nett increase in membership numbers. 44% (43% in 2014) of clubs experienced a nett decrease in numbers.
- In the past ten-year period, a cumulative loss of 11% is apparent, averaging 1.1% per year. The only state to experience a nett increase in membership numbers over this period is Western Australia, with an 11% increase.
- Approximately two thirds of clubs in Australia have less than 200 members, with 83% having less than 500 members.
- While clubs of over 1,000 members account for only 4% of all clubs across Australia, they account for 24% of individual members.
- NSW has the most number of golf clubs with 378, and the highest average member size of 394.
- Western Australia has the highest number of social clubs with 121.
- There are 306 Social clubs affiliated to various state bodies, accounting for 18% of total clubs. These clubs either typically have semi-permanent access rights to a public course facility (eg. Golf League Clubs (VGL) in Victoria) or are a club that utilise Golflink for handicapping purposes in the events they deliver to their members.
- Reported member numbers for social clubs have increased over the past five-years from 10,975 in 2011 to 20,745 in 2015.
- The average age of club members across the country is just over 55 years, as it was in 2014. There remains some variation across different states/territories, with New South Wales, Victoria and South Australia all having averages slightly in excess of the national average.
- In terms of gender, the average age of male members (53.4 years) is 9 years younger than females (62.5 years), with an age disparity being evident across all states/territories.
- 54% of the national club golf membership base is aged 55 years or greater.
- Reported junior members (under the age of 18) account for 3.6% of total members across the country. This proportion is higher for males than females, with 4% of male members being juniors while 2.3% of female members are juniors.
- Data from Golflink indicates that there is a national attraction rate of 8%, and an attrition rate of 9%.
- In terms of the 74 defined intrastate golf districts across the country, 30 regions experienced positive membership growth over the period, whilst the other 44 regions experienced a decline.

01 KEY **FINDINGS** (CONT)

The key findings with regard to competition rounds played trends from 2015 are outlined below:

- For the twelve month period to end December 2015 approximately 14.54 million rounds were recorded by GolfLink across the same number of facilities, a 1.9% increase over the same twelve month period in the prior year.
- On a year-end basis, slightly higher growth was recorded in rounds played by male golfers, accounting for 82% of all rounds played, as summarised below.
- Western Australia experienced the largest increase in rounds played for the financial year, recording 10% growth over 2015, largely due to strong outcomes from January through to June. The state of Victoria also benefitted from a less disruptive year weather-wise, with rounds growth recorded in each quarter of the year. Conversely a negative annual outcome was recorded in NSW and SA as the autumn and winter periods delivered softer demand over the corresponding period of 2014
- Stronger results were recorded in the metropolitan markets than those recorded nationally with the collective capital cities enjoying 3.6% growth over 2014. Standout performers were the Perth, Adelaide and Melbourne markets, with 13.9%, 6.9% and 4.8% rounds growth respectively recorded for these markets.

For the **twelve month period to end December 2015** approximately **14.54 million rounds were recorded** by GolfLink across the same number of facilities, a **1.9% increase** over the previous year.

02 2015 GROWTH INITIATIVES

National Participation Growth Initiatives

A number of national programs and initiatives have been developed by Golf Australia in collaboration with the industry to grow participation which include:

MyGolf

Junior program targeted to girls and boys aged 5 to 12 years that is delivered at golf facilities and schools. Administered by GA and the PGA of Australia under a joint venture, the goal of the program is to increase participation and engagement in golf by children.

Swing Fit

Innovative female introductory program that focusses on health, social & basic skill development with a primary target age of 18-39 years and a secondary target age of 40 plus.

Club Support

Whole of sport initiative that provides clubs with human resources, tools and information to assist their capability, financial performance and sustainability.

Golf Month

National campaign held in October to increase membership and participation with facilities conducting a variety of activities to encourage new, returning and current golfers to play more golf.

Qantas Golf Club

Program developed by Qantas Loyalty in partnership with GA to increase participation through offering high quality events, tee times and an official GA handicap.

Community Instructor

Program designed to grow the game through the effective development of a volunteer workforce at grassroots level as a result of the ongoing collaboration between GA and the PGA of Australia.

03 REPORT BACKGROUND

Introduction

Golf Australia, in conjunction with the **Golf Management Australia** (GMA), is pleased to present to you the **2015 National Participation Report**. It continues to be the goal of both bodies to provide the wider golf industry with key participation information that enables the sport to understand the current landscape and trends in golf participation. It is hoped that this report therefore becomes a valuable reference for the development of evidenced based strategies designed to drive the future growth and overall sustainability of the game.

About the Author

Seeking independence of data analysis and subsequent interpretation with this project, Golf Australia and GMA sought the expertise of **Golf Business Advisory Services** (GBAS) to draft this report. GBAS authored the 2013 and the 2014 reports and have also authored a number of other industry reports covering such topics as club operational and salary benchmarking, membership attrition and retention, national rounds played, and golf retail operations. For more information on GBAS please visit **www.golfbas.com**

04 NATIONAL CLUB MEMBERSHIP OVERVIEW

Introduction

The following section provides an overview of current national golf club participation data.

The Australian Sports Commission (ASC) is in the process of developing an AusPlay Survey which is a key part of the ASC's *Play.Sport.Australia.* participation strategy. It will be the ASC's first comprehensive national participation survey to better understand sport participation trends in Australia and fills a major gap in national data following the ABS decision in 2014 to cease funding for all sport and recreation data collection. The first AusPlay data will be published in late 2016 through the Clearinghouse for Sport. Data will be added over time, most of which will be publicly available.

Member Golf Association Reporting

Club golfer numbers are reported annually each year by the seven respective state and territory member golf association (MGA) bodies. The reported numbers reflect those members who pay a capitation fee to their respective body, generally defined as those classified as 'having a class of membership that provides regular golf course access.' The respective reporting periods and the respective membership timing they represent are depicted in the chart below:

State	MGA Annual Report	Data Collected	Period
NSW/ ACT *	2014/15	May 2015	Most recent completed financial year
VIC	Calendar Year 2015	July 2015	Most recent completed financial year
QLD	Calendar Year 2015	December 2014	Point in time
SA	2014/15	December 2014	Point in time
WA	2014/15	December 2014	Point in time
TAS	Calendar Year 2015	June 2015	Point in time
NT	2014/15	December 2014	Point in time

Note: *Throughout this report, New South Wales will refer to data from both New South Wales and the Australian Capital Territory.*

As outlined above, different collection and reporting periods exist within the MGA's. As a result, the reported numbers are not for the same comparable 12-month period. The MGA reports however remain the most accurate data sources available, with data provided by individual club by gender for 76 national regions and 1,658 clubs.

As in 2014, in order for annual trends to be determined, the most recently published (or to be published) numbers have been aggregated and classified as year ending 2015 numbers.

Profile of Australian Clubs

The current size profile of Australian golf clubs, based on the 1,658 clubs that reported playing membership numbers for 2015, is outlined by general geographic location and club type in Table 1.

Table 1

Club Membership Size	Metro	Regional	Social	Total	% Clubs	% Members
< 100	12	611	269	892	54%	9%
100 to 199	11	192	20	223	13%	8%
200 to 299	13	99	7	119	7%	7%
300 to 399	18	57	5	80	5%	7%
400 to 499	16	45	2	63	4%	7%
500 to 599	20	41	1	62	4%	9%
600 to 699	14	33	1	48	3%	8%
700 to 799	21	17	–	38	2%	7%
800 to 899	19	12	–	31	2%	7%
900 to 999	15	17	–	32	2%	8%
1000 to 1099	14	6	–	20	1%	5%
1100 to 1199	13	3	–	16	1%	5%
1200+	24	9	1	34	2%	14%
Total	**210**	**1,142**	**306**	**1,658**	**100%**	**100%**
% of Clubs	**13%**	**69%**	**18%**	**100%**	**–**	**–**
Average size	**718**	**197**	**68**	**239**	**–**	**–**

Source: Golf Australia Database

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

- The average club size in Australia is 239 members, with metropolitan clubs on average having more than three times the number of members compared with regional clubs.
- Approximately two thirds of clubs in Australia have less than 200 members, with 83% having less than 500 members.
- 69% of all clubs in Australia are located in a regional area.
- While clubs of over 1,000 members account for only 4% of all clubs across Australia, they account for 24% of individual members.
- There are 306 Social clubs affiliated to various state bodies, accounting for 18% of total clubs. These clubs either typically have semi-permanent access rights to a public course facility (eg. Golf League Clubs (VGL) in Victoria) or are a club that utilise Golflink for handicapping purposes in the events they deliver to their members.

Profile of Australian Clubs (cont)

The current size profile by state/territory for 2015 is outlined in Table 2.

Table 2

Club Membership Size	NSW	VIC	QLD	WA	SA	TAS	NT	Total
Social Clubs	–	108	1	121	75	1	–	306
Golf Clubs								
< 100	116	147	98	142	92	24	4	623
100 to 199	49	57	39	13	23	19	3	203
200 to 299	41	23	25	8	8	5	2	112
300 to 399	26	20	11	5	6	7	–	75
400 to 499	19	17	14	3	5	2	1	61
500 to 599	26	15	13	3	2	2	–	61
600 to 699	23	11	7	5	1	–	–	47
700 to 799	16	11	6	2	2	–	1	38
800 to 899	16	6	7	1	1	–	–	31
900 to 999	18	5	3	5	–	1	–	32
1000 to 1099	7	7	3	–	3	–	–	20
1100 to 1199	11	3	1	–	1	–	–	16
1200+	10	11	7	3	2	–	–	33
Total golf clubs	**378**	**332**	**234**	**190**	**146**	**60**	**11**	**1,351**
Average golf club size	**394**	**332**	**279**	**176**	**177**	**178**	**210**	**294**

Source: Golf Australia Database

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

- NSW has the most number of golf clubs with 378, and the highest average member count with 394.
- Western Australia has the highest number of social clubs with 121.
- Western Australia, South Australia and Tasmania have the lowest average member counts, all approximating 180.

Club Playing Members

2015 National Total

For the 2015 period, national membership numbers across Australia were reported as 397,063 golfers. This result marked a 0.5% decline on numbers reported for the prior 12-month period, equating to a nett loss of 1,983 individual members.

Only the Northern Territory experienced a nett gain in membership numbers for the period, while Tasmania experienced the greatest decline at 4.0%.

Table 3 summarises the national results recorded for 2015.

-0.5%

National membership numbers across Australia showed a 0.5% decline on numbers reported for the prior 12-month period.

Table 3

State/Territory	2014	2015	Change	% Change
NSW	149,855	149,023	-832	-0.6%
VIC	111,026	110,519	-507	-0.5%
QLD	65,282	65,262	-20	0.0%
WA	33,627	33,439	-188	-0.6%
SA	25,909	25,822	-87	-0.3%
TAS	11,131	10,685	-446	-4.0%
NT	2,216	2,313	97	4.4%
Total	**399,046**	**397,063**	**-1,983**	**-0.5%**

Source: Golf Australia Database

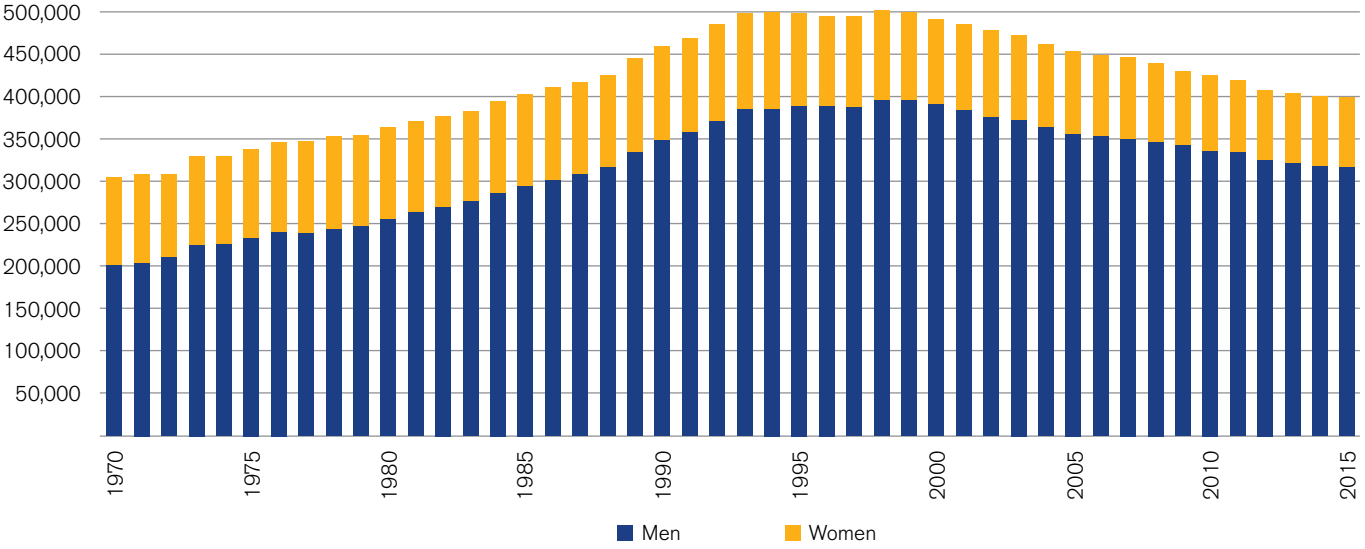
Note: comparative numbers from 2014 have been reset for Queensland, Western Australia and Victoria, and therefore do not match those reported in the 2014 Participation Report.

Historical Trends

History shows that club membership numbers peaked in Australia in 1998 at approximately 500,000 golfers. Since this time, a steady decline in golfers has materialised with an overall decline of 21%, averaging 1.3% per year.

The long term membership picture for males and females is illustrated in Chart 1.

Chart 1



Source: Golf Australia Database

The 2015 outcome saw a continuation of the decline in membership numbers evident since 1998. In the past ten-year period, a cumulative loss of 11% has materialized, with an average decline of 1.1% per year. The only state to experience a nett increase in membership numbers over this period is Western Australia, with an 11% increase.

Club Playing Members (cont)

Historical Trends (cont)

Table 4 summarises the national results recorded for the ten-year period 2006 to 2015.

Table 4

State / Territory	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	% Change
NSW	180,583	179,080	176,269	172,034	166,844	163,032	156,982	153,606	149,855	149,023	-17%
VIC	117,183	115,456	115,207	113,712	112,539	111,218	110,051	111,907	111,026	110,519	-6%
QLD	73,662	73,951	73,877	73,608	72,131	71,699	67,714	65,785	65,282	65,262	-11%
WA	30,020	30,214	30,210	29,836	30,636	30,702	31,409	32,837	33,627	33,439	11%
SA	29,434	28,951	27,981	27,971	27,647	27,140	26,211	25,683	25,909	25,822	-12%
TAS	13,478	13,299	12,965	12,814	12,612	12,148	11,847	11,310	11,131	10,685	-21%
NT	2,068	2,214	2,362	2,573	2,486	2,369	2,293	2,276	2,216	2,313	12%
Metropolitan	167,915	166,906	166,772	164,488	162,465	162,104	155,959	154,265	151,478	150,849	-10%
Regional	269,167	266,826	262,722	258,113	251,710	245,229	235,936	231,375	228,342	225,395	-16%
Social	9,346	9,433	9,377	9,947	10,720	10,975	14,612	17,764	19,226	20,819	123%
Total members	**446,428**	**443,165**	**438,871**	**432,548**	**424,895**	**418,308**	**406,507**	**403,404**	**399,046**	**397,063**	**-11%**
Total facilities	**1,405**	**1,406**	**1,399**	**1,393**	**1,389**	**1,384**	**1,378**	**1,376**	**1,361**	**1,351**	**-4%**

Source: *Golf Australia Database*

Note: *Total facilities represents all course-based clubs and does not include social clubs that operate within a public facility.*

Club Playing Members (cont)

Results by Geographic Area

Overall movement for metropolitan clubs was a decline of 0.4%, which compares favourably to the 1.3% decline for regional clubs.

Victoria was the strongest performing metropolitan area with an increase of 1.3%, whilst declines were experienced in Queensland (3.0%), Western Australia (1.6%) and South Australia (1.3%)

For regional areas, significant declines were experienced in Victoria (3.1%), Western Australia (3.3%) and Tasmania (5.1%).

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

Table 5

	Metropolitan			Regional			Total		
State/Territory	2014	2015	Change	2014	2015	Change	2014	2015	Change
NSW	63,515	63,251	-0.4%	86,340	85,772	-0.7%	149,855	149,023	-0.6%
VIC	40,801	41,329	1.3%	58,020	56,206	-3.1%	98,821	97,535	-1.3%
QLD	15,113	14,653	-3.0%	50,016	50,184	0.3%	65,129	64,837	-0.4%
WA	16,730	16,457	-1.6%	11,737	11,355	-3.3%	28,467	27,812	-2.3%
SA	13,146	12,981	-1.3%	11,078	11,082	0.0%	24,224	24,063	-0.7%
TAS	2,173	2,178	0.2%	8,935	8,483	-5.1%	11,108	10,661	-4.0%
NT	–	–	–	2,216	2,313	4.4%	2,216	2,313	4.4%
Total	**151,478**	**150,849**	**-0.4%**	**228,342**	**225,395**	**-1.3%**	**379,820**	**376,244**	**-0.9%**

Source: *Golf Australia Database*

Note: *This table excludes social clubs.*

Social Clubs

Reported member numbers for social clubs have increased over the past five-years from 10,975 in 2011 to 20,745 in 2015. Annual growth on a state by state basis is summarised in Table 6.

Table 6

State/Territory	2011	2012	2013	2014	2015	Change
VIC	6,822	10,000	11,410	12,205	12,984	90%
QLD	–	–	30	153	425	–
WA	2,738	3,316	4,840	5,160	5,627	106%
SA	1,415	1,296	1,484	1,685	1,759	24%
TAS	–	–	–	23	24	–
Total	**10,975**	**14,612**	**17,764**	**19,226**	**20,819**	**90%**
Total social clubs	**166**	**208**	**264**	**288**	**306**	**84%**

Source: *Golf Australia Database*

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

Club Playing Members (cont)

Results by Gender

When assessed by gender, a slight decline of 0.2% was apparent for males whilst for females, there was a larger decline of 1.5%. Tasmania was the only state to experience a significant decline for males in excess of 1% whilst for females, declines in excess of 1% were experienced in New South Wales, Victoria, Western Australia and Tasmania.

These results are summarized in Table 7.

Table 7

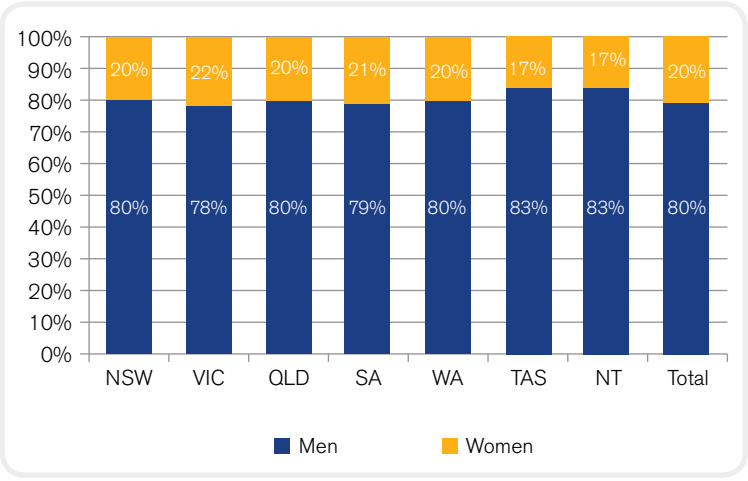
	Male			Female		
State/Territory	2014	2015	Change	2014	2015	Change
NSW	119,669	119,476	-0.2%	30,186	29,547	-2.1%
VIC	86,778	86,539	-0.3%	24,248	23,980	-1.1%
QLD	52,473	52,481	0.0%	12,809	12,781	-0.2%
WA	26,319	26,309	0.0%	7,308	7,130	-2.4%
SA	20,816	20,726	-0.4%	5,093	5,096	0.1%
TAS	9,153	8,826	-3.6%	1,978	1,859	-6.0%
NT	1,850	1,910	3.2%	366	403	10.1%
Total	**317,058**	**316,267**	**-0.2%**	**81,988**	**80,796**	**-1.5%**

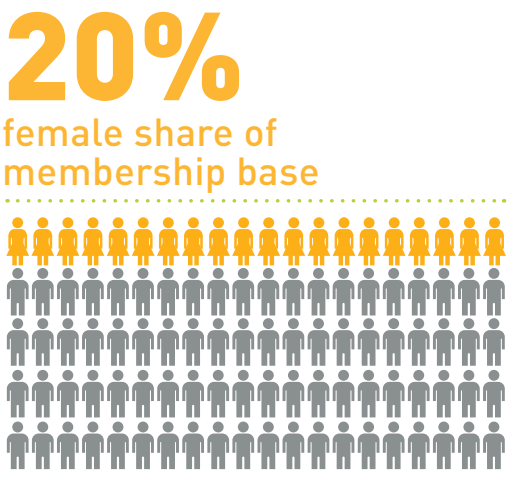
Source: Golf Australia Database

Given the larger proportional decline in members in 2015, females now account for 20% of national members – a 1% decline from 2014.

The gender mix evident by state for the 2015 year, as summarised in Table 7, shows some variation between states/territories. Victoria has the highest percentage of female members at 22% while the lowest is in the Northern Territory at 17%, as summarised in Chart 2.

Chart 2





Source: Golf Australia Database

Level of Membership Movement

34% (35% in 2014) of clubs experienced a nett increase in membership numbers for 2015, compared to 44% (43% in 2014) of clubs that experienced a nett decrease in numbers. Table 8 summarizes the number of clubs that have experienced positive and negative shifts in their membership base for each size category, and the scale of the shifts experienced.

Table 8

	Increase		Flat	Decrease	
Club size	**>5%**	**2-5%**	**<2% Variance**	**3-5%**	**>5%**
Less than 200	29%	6%	21%	6%	37%
200 to 399	24%	11%	15%	18%	32%
400 to 599	26%	12%	20%	8%	34%
600 to 799	24%	9%	29%	7%	31%
800 to 999	17%	14%	24%	13%	32%
1,000 to 1199	25%	6%	44%	8%	17%
1,200+	27%	12%	45%	9%	6%
Overall	**27%**	**8%**		**8%**	**34%**
	34%		**22%**	**44%**	

Playing Member Age Profile

Average Age

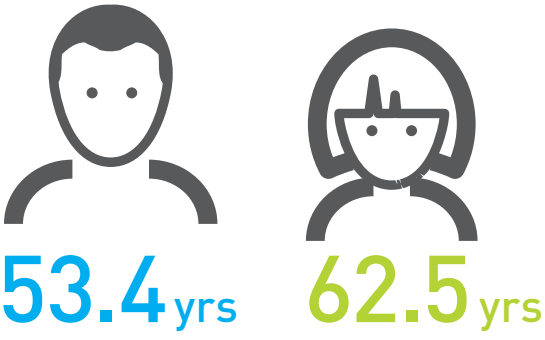
The average age of club members across the country is just over 55 years, as it was in 2014. There remains some variation across different states/territories, with New South Wales, Victoria and South Australia all having averages slightly in excess of the national average.

In terms of gender, the average age of male members is nine years younger than females, with an age disparity on this scale being evident across all states/territories.

Full results of the age breakdown for male and female club members by state are depicted in Table 9.

Table 9

State	Male	Female	Total	Median
NSW	53.7	62.8	55.4	57
VIC	53.9	63.5	55.8	56
QLD	52.8	61.2	54.2	55
WA	52.6	60.2	54.0	56
SA	54.6	63.8	56.3	58
TAS	50.0	60.9	51.5	52
NT	47.8	53.2	48.6	49
Average	**53.4**	**62.5**	**55.1**	**56**



Average age of male and female members is 53.4 years and 62.5 years respectively

Playing Member Age Profile (cont)

Age Distribution

54% of the national club golf membership base is aged 55 years or greater. The relative breakdown of club members by age bracket for each state/territory is depicted in Table 10.

Table 10

Age brackets	NSW	VIC	QLD	WA	SA	TAS	NT	Overall
<18	4%	4%	3%	3%	3%	3%	4%	4%
18-34	14%	15%	16%	15%	13%	21%	19%	15%
35-44	12%	13%	14%	12%	13%	14%	17%	13%
45-54	16%	16%	16%	17%	15%	16%	21%	16%
55-64	19%	19%	18%	21%	19%	18%	22%	19%
65-74	21%	20%	19%	20%	22%	16%	13%	20%
75+	14%	13%	14%	12%	15%	12%	4%	14%

Playing Member Age Profile (cont)

Junior Members

Reported junior members (under the age of 18) account for 3.5% of total members across the country. This proportion is higher for males than females, with 3.7% of male members being juniors while 2.5% of female members are juniors.

There is some variation across different states, with a higher proportion of junior members evident in New South Wales (3.9%). Western Australia reported the lowest proportion of junior members, with 2.6% members.

A summary of junior membership is found in Table 11.

Table 11

	Male Junior		Female Junior		Total Juniors	
State/Territory	2015	% of Males	2015	% of Females	2015	% Total
NSW	5,092	4.3%	731	2.5%	5,823	3.9%
VIC	3,234	3.7%	599	2.5%	3,833	3.5%
QLD	1,778	3.4%	404	3.2%	2,182	3.3%
WA	753	2.9%	132	1.9%	885	2.6%
SA	634	3.1%	95	1.9%	729	2.8%
TAS	265	3.0%	31	1.7%	296	2.8%
NT	62	3.2%	26	6.5%	88	3.8%
Total	**11,818**	**3.7%**	**2,018**	**2.5%**	**13,836**	**3.5%**

Note: *As Victoria does not collate membership number for juniors, the relative percentage of juniors for each gender from across the rest of the country is applied to Victoria's total male and female membership figure to arrive at an estimation of junior male and female figures.*

Attraction & Attrition Rates

Utilising data from Golflink, GA 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 stated year-end numbers from the state body annual reports, these rates can be accurately calculated. This data shows a national attraction rate of 8%, and an attrition rate of 9%.

Table 12 depicts the movement in members on a state basis, showing the relevant attraction and attrition rates that apply.

Table 12

State	2014	Attraction	New	Attrition	Resigned	% Change	2015
NSW	149,855	7%	10,809	8%	11,332	-0.6%	149,023
VIC	98,821	7%	7,238	9%	8,618	-1.3%	97,535
QLD	65,129	12%	7,968	12%	7,896	-0.4%	64,837
WA	28,467	10%	2,758	12%	3,458	-2.3%	27,812
SA	24,224	9%	2,152	9%	2,249	-0.7%	24,063
TAS	11,108	9%	963	12%	1,320	-4.0%	10,661
NT	2,216	14%	318	10%	221	4.4%	2,313
Total	**379,820**	**8%**	**32,242**	**9%**	**35,114**	**-0.9%**	**376,244**

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

Table 13 below depicts attrition rates only by state/territory. Table 14 below depicts attrition rates only by club size.

Table 13

State/Territory	Metro	Regional	Overall
NSW	7%	8%	8%
VIC	5%	12%	9%
QLD	10%	13%	12%
WA	10%	15%	12%
SA	9%	9%	9%
TAS	8%	13%	12%
NT	–	10%	10%
Total	**7%**	**11%**	**9%**

Table 14

Club size	Metro	Regional	Overall
Less than 200	25%	15%	16%
200 to 399	13%	14%	14%
400 to 599	10%	9%	9%
600 to 799	10%	8%	9%
800 to 999	11%	5%	8%
1,000 to 1,199	2%	10%	4%
1,200+	3%	2%	2%
Overall	**7%**	**11%**	**9%**

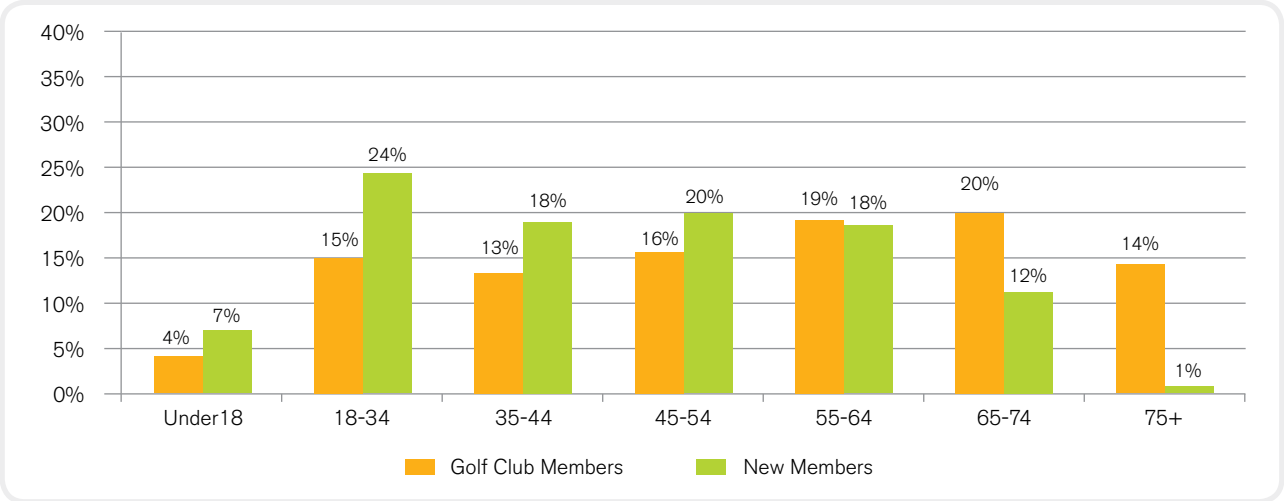
Key observations noted from these tables include:

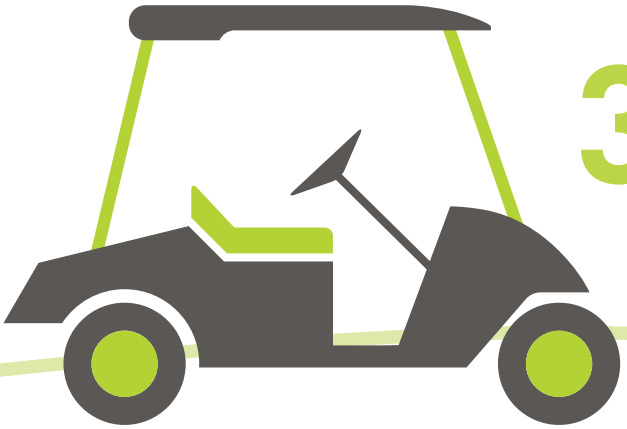
- Higher attrition rates are evident at regional clubs compared to metropolitan clubs.
- Based on club size, average attrition rates range from 16% for smaller clubs to 2% for the largest clubs.

New Member Profile

Outlined earlier in this report is the level of new demand recorded in 2015, approximately 9% of total golf club membership. With data sourced from Golflink, the age profile of new members is depicted in Chart 3. This indicates that there is a younger age profile evident in new members than the wider total membership base. Specifically, 31% of new members are under the age of 35 compared to 19% for all golf club members.

Chart 3





31%

of new members in 2015 are **under the age of 35** compared to **19% for all golf club members.**

05 STATE MEMBERSHIP OUTCOMES

Introduction

In terms of the 74 defined intrastate golf districts across the country, 30 regions experienced positive membership growth over the period, whilst the other 44 regions experienced a decline.

Where female members of clubs may be classified in a different district to the male members of the same club, female membership numbers have been allocated to the male districts to allow district analysis to occur. No district analysis has been undertaken for the Northern Territory as no separate golf districts exist in this area.

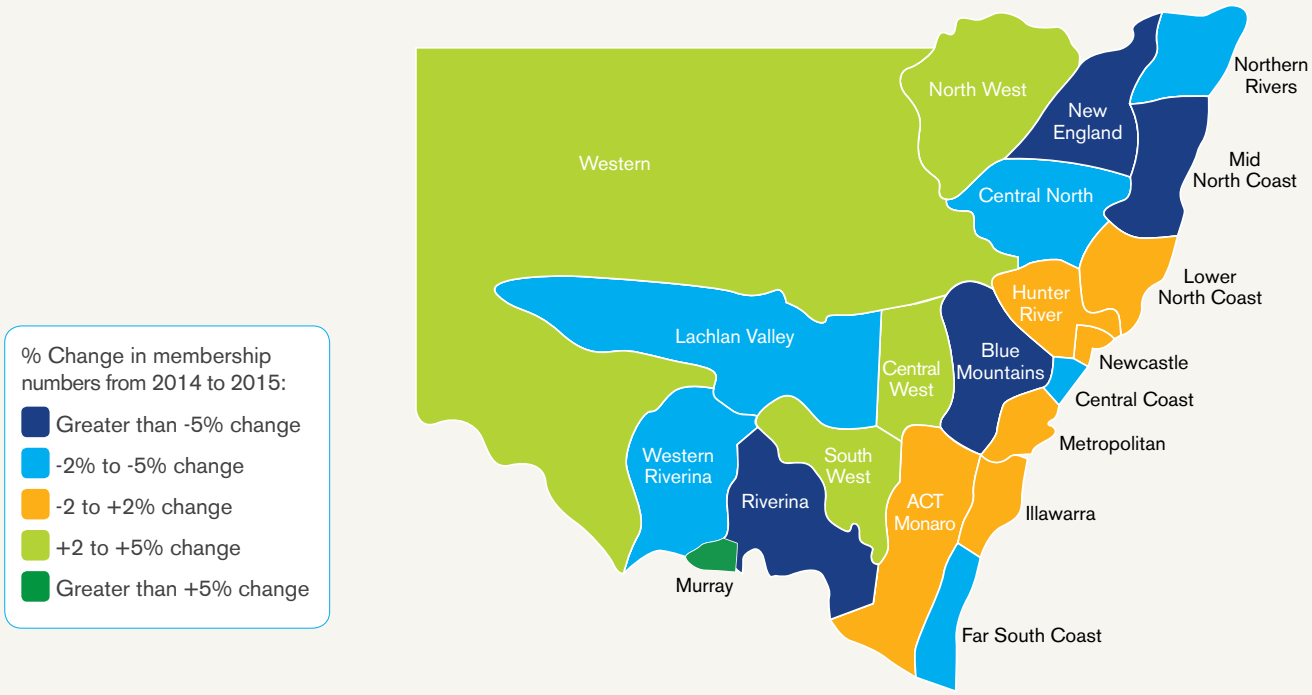
NSW

NSW & the ACT combined, with a decline of 0.6% in club membership numbers. Eight of the 21 districts in NSW experienced a nett increase in membership numbers in Table 15:

Table 15

Region	2014	2015	Change	%
Murray	4,984	5,619	635	12.7%
Central Western	3,484	3,628	144	4.1%
Western	1,985	2,056	71	3.6%
South West	1,373	1,407	34	2.5%
North West	1,055	1,080	25	2.4%
Lower North Coast	4,728	4,806	78	1.6%
ACT-Monaro	8,963	9,092	129	1.4%
Newcastle	8,795	8,885	90	1.0%
Metropolitan	63,515	63,251	-264	-0.4%
Hunter River	4,216	4,191	-25	-0.6%
Illawarra	9,344	9,175	-169	-1.8%

Region (cont)	2014	2015	Change	%
Northern Rivers	7,798	7,643	-155	-2.0%
Central Coast	7,120	6,942	-178	-2.5%
Far South Coast	5,471	5,321	-150	-2.7%
Lachlan Valley	914	884	-30	-3.3%
Western Riverina	1,830	1,765	-65	-3.6%
Central North	2,710	2,599	-111	-4.1%
Mid North Coast	5,532	5,161	-371	-6.7%
New England	1,541	1,426	-115	-7.5%
Blue Mountains	2,562	2,332	-230	-9.0%
Riverina	1,935	1,760	-175	-9.0%
Total	**149,855**	**149,023**	**-832**	**-0.6%**



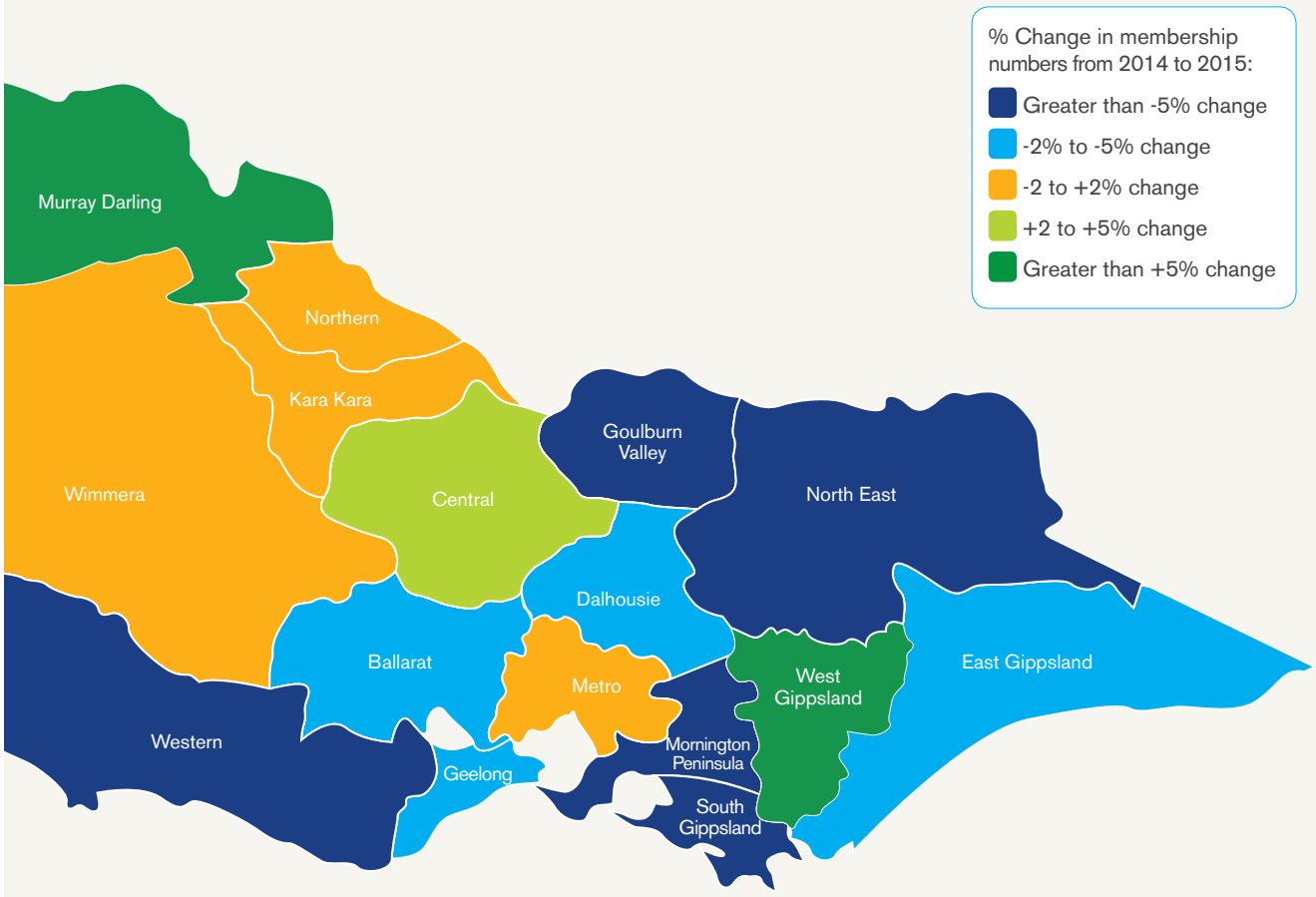
Victoria

The state of Victoria experienced a 1.3% decline in club membership numbers, which equates to a nett loss of 1,286 members. This result comes despite an increase for metropolitan clubs of 1.4%. Of the 17 districts, seven experienced a nett increase in membership numbers.

Table 16

Region	2014	2015	Change	%
Murray Darling	2,135	2,713	578	27.1%
West Gippsland	3,314	3,488	174	5.3%
Central	2,747	2,884	137	5.0%
Metropolitan	40,364	40,920	556	1.4%
Wimmera	2,035	2,059	24	1.2%
Kara Kara	455	460	5	1.1%
Northern	1,370	1,378	8	0.6%
East Gippsland	2,634	2,579	-55	-2.1%
Ballarat	3,480	3,371	-109	-3.1%

Region	2014	2015	Change	%
Dalhousie	2,107	2,014	-93	-4.4%
Geelong	10,558	10,084	-474	-4.5%
Western	3,859	3,649	-210	-5.4%
North East	5,372	5,057	-315	-5.9%
Affiliated	437	409	-28	-6.4%
South Gippsland	2,473	2,291	-182	-7.4%
Mornington Peninsula	10,653	9,781	-872	-8.2%
Goulburn Valley	4,828	4,398	-430	-8.9%
Total	**98,821**	**97,535**	**-1,286**	**-1.3%**



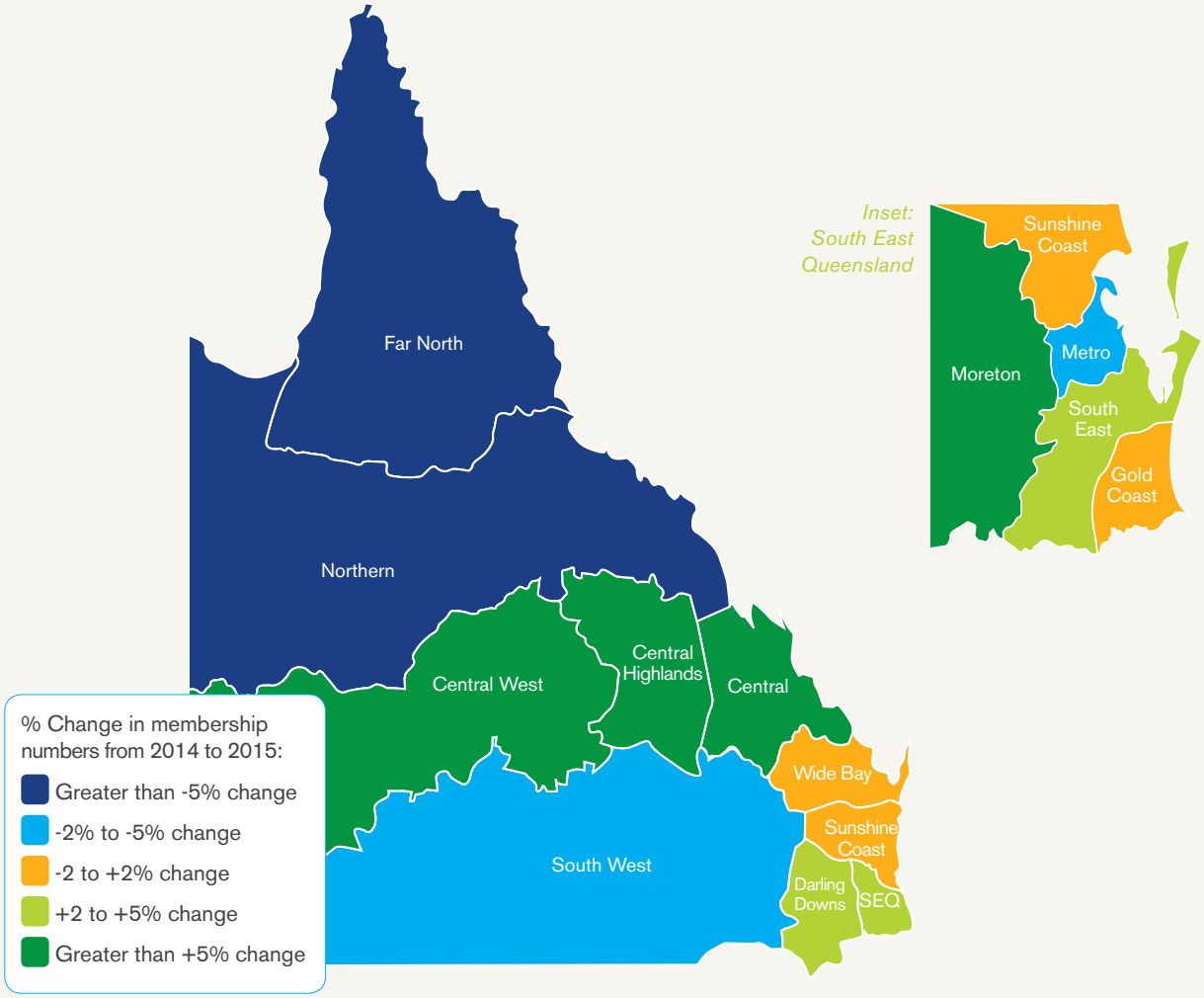
Queensland

The state of Queensland, with a decline of 292 or 0.4% in member numbers. Eight of the 13 districts experienced a nett increase in membership numbers in Table 17.

Table 17

Region	2014	2015	Change	%
Central Highlands	1,307	1,382	75	5.7%
Central West	244	258	14	5.7%
Moreton	2,087	2,200	113	5.4%
Central	3,105	3,272	167	5.4%
Darling Downs	3,706	3,839	133	3.6%
South East	4,352	4,465	113	2.6%
Wide Bay	3,198	3,242	44	1.4%

Region (cont)	2014	2015	Change	%
Sunshine Coast	12,582	12,587	5	0.0%
Gold Coast	10,848	10,810	-38	-0.4%
South West	847	823	-24	-2.8%
Metropolitan	15,113	14,653	-460	-3.0%
Far North	3,204	3,032	-172	-5.4%
Northern	4,536	4,274	-262	-5.8%
Total	**65,129**	**64,837**	**-292**	**-0.4%**

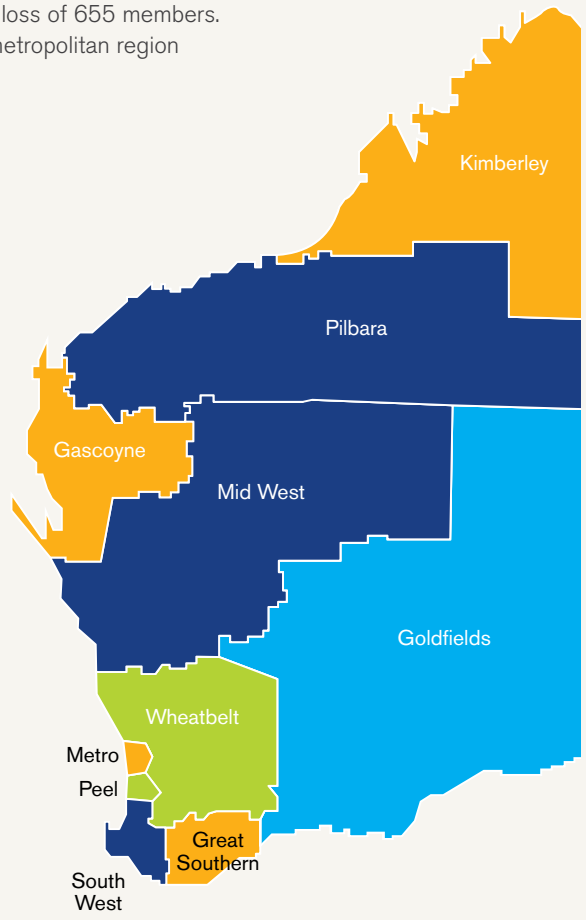


Western Australia

The state of Western Australia recorded a 2.3% decrease, a nett loss of 655 members. Three of the 10 regions experienced a nett increase, whilst the metropolitan region experienced a decline of 1.6%.

Table 18

Region	2014	2015	Change	%
Wheatbelt	2,299	2,399	100	4.3%
Peel	694	717	23	3.3%
Kimberley	448	451	3	0.7%
Great Southern	1,305	1,301	-4	-0.3%
Gascoyne	131	130	-1	-0.8%
Metropolitan	16,730	16,457	-273	-1.6%
Goldfields	1,011	975	-36	-3.6%
South-West	4,199	3,943	-256	-6.1%
Mid West	1,164	1,017	-147	-12.6%
Pilbara	486	422	-64	-13.2%
Total	**28,467**	**27,812**	**-655**	**-2.3%**



% Change in membership numbers from 2014 to 2015:

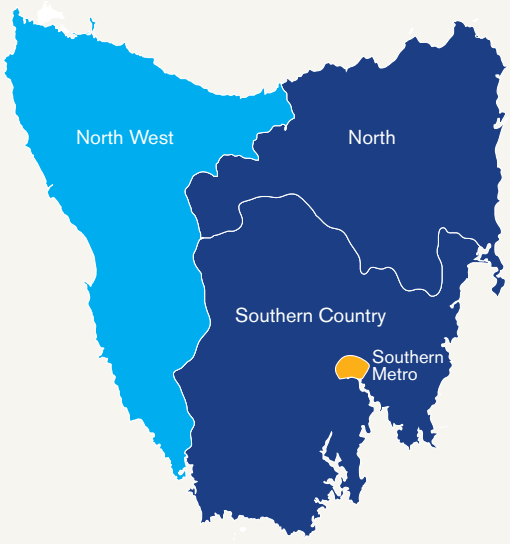
- Greater than -5% change
- -2% to -5% change
- -2 to +2% change
- +2 to +5% change
- Greater than +5% change

Tasmania

The state of Tasmania experienced a decline of 4%, with a nett loss of 447 members. This result was driven by losses in each of the three regional areas.

Table 19

Region	2014	2015	Change	%
Southern Metro	2,173	2,178	5	0.2%
North West	2,438	2,343	-95	-3.9%
Southern Country	3,029	2,870	-159	-5.2%
North	3,468	3,270	-198	-5.7%
Total	**11,108**	**10,661**	**-447**	**-4.0%**



South Australia

The state of South Australia experienced a decline of 161 members, representing a 0.7% decrease. Three of the nine districts experienced a nett increase in membership numbers, while the metropolitan region experienced a decline of 1.3%.

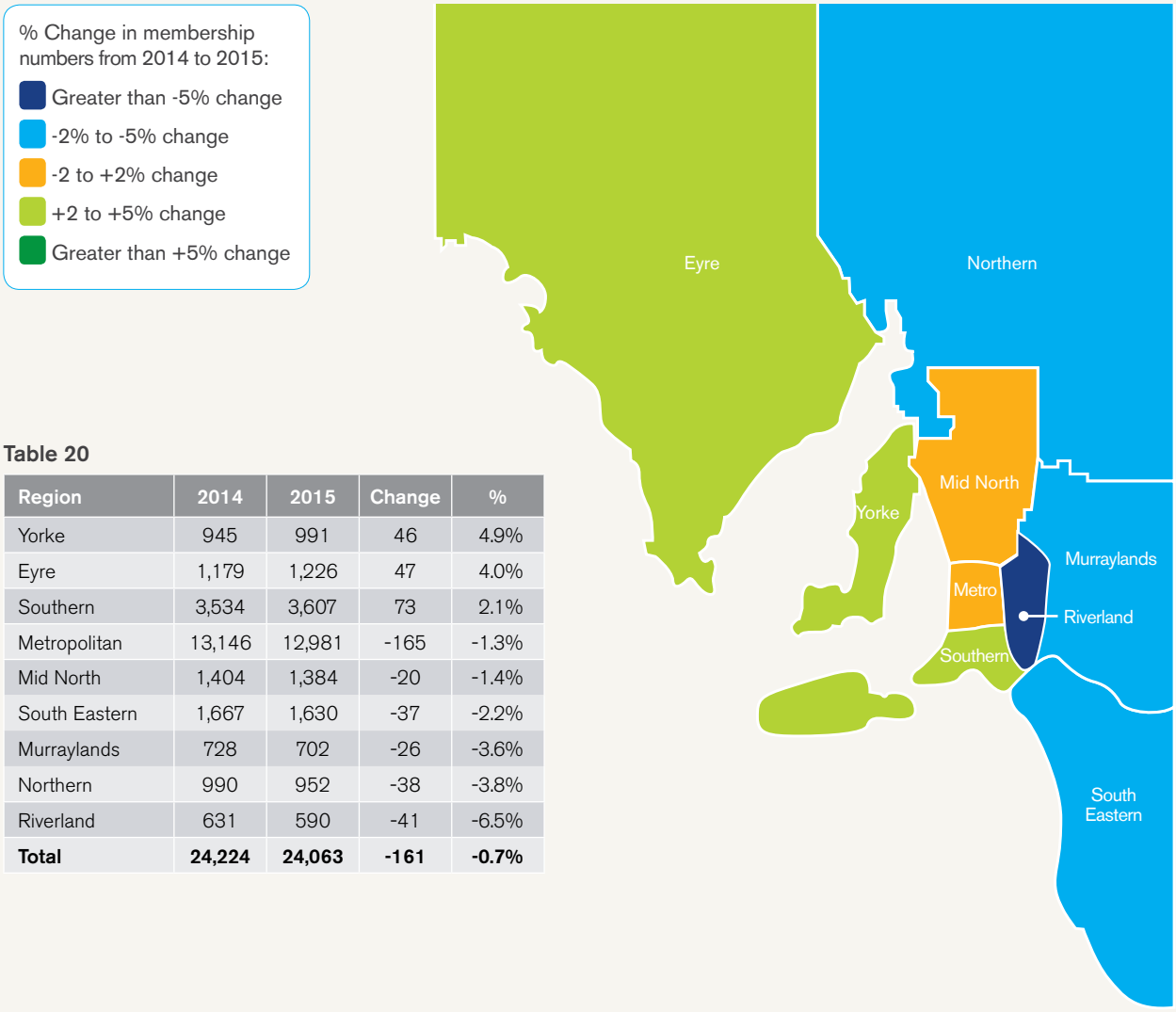


Table 20

Region	2014	2015	Change	%
Yorke	945	991	46	4.9%
Eyre	1,179	1,226	47	4.0%
Southern	3,534	3,607	73	2.1%
Metropolitan	13,146	12,981	-165	-1.3%
Mid North	1,404	1,384	-20	-1.4%
South Eastern	1,667	1,630	-37	-2.2%
Murraylands	728	702	-26	-3.6%
Northern	990	952	-38	-3.8%
Riverland	631	590	-41	-6.5%
Total	**24,224**	**24,063**	**-161**	**-0.7%**

06 CLUB GOLF COMPETITION ROUNDS

National Results

For the twelve month period to end December 2015 approximately 14.54 million rounds were recorded by GolfLink across the same facility base, a 1.9% increase over the same twelve month period in the prior year.

On a year-end basis, slightly higher growth was recorded in rounds played by male golfers, accounting for 82% of all rounds played, as summarised in Table 21.

Table 21

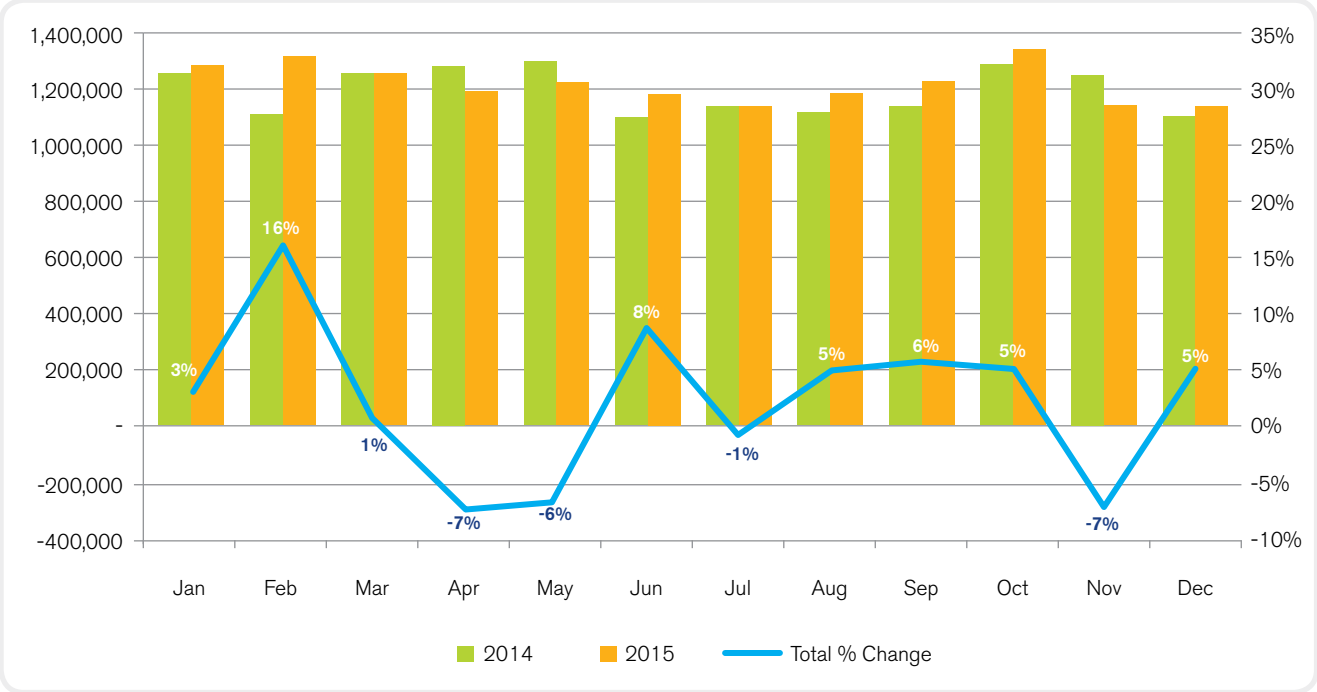
Gender	Year End 2014	Year End 2015	% Change
Male	11,678,726	11,926,154	2.1%
Female	2,590,780	2,615,935	1.0%
Total	**14,269,506**	**14,542,089**	**1.9%**
% Male share	81.8%	82.0%	

Source: GolfLink, Golf Australia, GBAS

Male and female competition rounds in 2015 grew by 2.1% and 1.0% respectively.

Month over month competition rounds growth was achieved in seven of the twelve monthly periods as illustrated below in Chart 4.

Chart 4



Source: GolfLink, Golf Australia, GBAS

Results by State/Territory

Western Australia experienced the largest increase in rounds played for the financial year, recording 10% growth over 2015, largely due to strong outcomes from January through to June. The state of Victoria also benefitted from a less disruptive year weather-wise, with rounds growth recorded in each quarter of the year. Conversely a negative annual outcome was recorded in NSW and SA as the autumn and winter periods delivered softer demand over the corresponding period of 2014

Rounds played by state for each quarter of 2015 and the movement recorded over the corresponding period in 2014 are summarised in Table 22.

Table 22

2014	Jan – Mar	April – June	July – Sept	Oct – Dec	Total
NSW	1,412,181	1,244,857	1,311,380	1,346,554	5,314,972
VIC	1,067,888	985,673	891,132	983,487	3,928,180
QLD	619,161	656,172	702,630	636,579	2,614,542
WA	298,761	310,562	304,493	285,974	1,199,790
SA	281,487	272,186	244,642	257,363	1,055,678
TAS	98,092	84,211	81,235	95,923	359,461
NT	16,415	19,050	19,369	14,632	69,466
Total	**3,793,985**	**3,572,711**	**3,554,881**	**3,620,512**	**14,542,089**
% change over PY					
NSW	4.4%	-9.0%	2.6%	-1.5%	-1.0%
VIC	8.7%	4.6%	1.9%	1.3%	4.2%
QLD	-1.8%	-4.0%	5.5%	4.5%	1.0%
WA	12.8%	19.0%	13.4%	3.0%	11.9%
SA	13.0%	-8.4%	-3.6%	-2.4%	-0.8%
TAS	8.4%	-0.2%	12.8%	0.6%	5.0%
NT	25.3%	8.6%	0.4%	-5.3%	6.2%
Total	**5.9%**	**-2.2%**	**3.6%**	**0.6%**	**1.9%**

Source: GolfLink, Golf Australia, GBAS

Results by Capital City

Stronger results were recorded in the metropolitan markets than those recorded nationally with the collective capital cities enjoying 3.6% growth over 2014. Standout performers were the Perth, Adelaide and Melbourne markets, with 13.9%, 6.9% and 4.8% rounds growth respectively recorded for these markets.

Rounds played by the major metropolitan markets in each state for each quarter of 2015 and the movement recorded over the corresponding period in 2014 are summarised in Table 23.

Table 23

2015	Jan - Mar	April - June	July - Sept	Oct - Dec	Total
Sydney	644,030	568,400	608,499	621,715	2,442,644
Brisbane	129,550	136,094	144,833	132,194	542,671
Adelaide	186,199	171,311	153,437	171,905	682,852
Melbourne	530,863	485,076	436,086	484,030	1,936,055
Perth	208,832	207,762	202,334	181,831	800,759
Total	**1,699,474**	**1,568,643**	**1,545,189**	**1,591,675**	**6,404,981**
% change over PY					
Sydney	3.5%	-7.9%	7.5%	-1.1%	0.3%
Brisbane	-7.8%	-7.5%	1.6%	1.0%	-3.3%
Adelaide	14.1%	7.6%	7.9%	-1.4%	6.9%
Melbourne	9.3%	6.5%	0.6%	2.5%	4.8%
Perth	20.1%	8.9%	25.8%	2.4%	13.9%
Total	**7.2%**	**-0.1%**	**6.9%**	**0.5%**	**3.6%**

2014	Jan-Mar	Apr - Jun	Jul - Sep	Oct - Dec	Total
Total Metro	1,699,474	1,568,643	1,545,189	1,591,675	6,404,981
Total Regional	2,094,511	2,004,068	2,009,692	2,028,837	8,137,108
Total	**3,793,985**	**3,572,711**	**3,554,881**	**3,620,512**	**14,542,089**
% change over PY					
Total Metro	7.2%	-0.1%	6.9%	0.5%	3.6%
Total Regional	4.8%	-3.9%	1.2%	0.7%	0.6%
Total	**5.9%**	**-2.2%**	**3.6%**	**0.6%**	**1.9%**

Source: GolfLink, Golf Australia, GBAS

+3.6% metropolitan

+1.9% regional

Competition rounds in metropolitan and regional areas grew by 3.6% and 1.9% in 2015

07 PROGRAM PARTICIPANTS, EVENTS, DELIVERERS & OFFICIALS

Table 24 summarises a number of key participation areas that are measured by Golf Australia as a requirement to report to the Australian Sports Commission.

Table 24

Program Participants	2012/13 ACTUAL	2013/14 ACTUAL	2014/15 ACTUAL
MyGolf National Junior Program	4,846	939	3,480
Other Non-MyGolf Junior Programs	8,974	12,577	10,586
Crown Lager Social/GA Social Golf Club	2,478	2,898	–
Qantas Golf Club	–	–	35,486
Other Casual Golf Programs	7,550	7,027	3,268
Indigenous	2,513	1,458	1,687
Disability	1,549	2,224	2,645
Female	15,005	12,536	7,363
Seniors	13,213	14,063	4,068
New Formats	–	–	6,342
Other programs	1,004	2,576	1,305
Total	**57,132**	**56,298**	**76,230**
Event Entries (Men/Women/Mixed/Jnrs)			
Member Association State & Territory Events	56,575	50,894	56,798
Junior Foundation Events	7,447	7,696	9,232
Golf Australia National Events	1,724	1,665	1,545
PGA Events	98,422	93,829	96,656
ALPG Events	791	959	952
Total	**164,959**	**155,043**	**165,183**
School Delivered Programs Participants			
MyGolf Schools 1 (primary) program	45,936	56,499	52,404
MyGolf Schools 1 (primary) "tasters"	47,556	36,781	26,631
AASC/Sporting Schools Golf Program	13,820	16,035	8,292
MyGolf Schools 2 (secondary) program	24,854	22,748	19,619
MyGolf Schools 2 (secondary) "tasters"	2,312	1,518	518
Other Non-MyGolf School Programs	5,687	7,991	7,053
Total	**140,165**	**141,572**	**114,517**
School Managed Competitions Participants			
SSA 12 Yrs & Under Championship	2,401	3,698	4,623
SSA 19 Yrs & Under Championship	1,014	1,639	1,503
Total	**3,415**	**5,337**	**6,126**
Program Deliverers & Officials			
Development Personnel	33	34	34
Community Golf Leaders & Coaches	1,383	1,728	1,730
AASC/Sporting Schools Golf Coaches	678	502	419
PGA Coaches	1,615	1,562	1,652
ALPG Coaches	57	57	72
Rules Officials	4,886	4,796	4,563
Course Raters	418	248	157
Total	**9,070**	**8,927**	**8,627**

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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