



GolfAustralia



2019

GOLF CLUB PARTICIPATION REPORT OF AUSTRALIA

Published by Golf Australia / July 2020



About the Author

This report has been prepared for Golf Australia by Golf Business Advisory Services (GBAS).

Providing independence of data analysis and consistent interpretation of annual data, GBAS has authored all of past published participation reports for Golf Australia, along with a number of other leading industry reference reports.

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



Artwork & design by
Brand Media & Consulting
www.brand-media.com.au



Contents



Key Findings 5

Report Background 6

Broader Golf Participation Trends 8

AusPlay Data Introduction 9

All sports 9

Golf participation trends 10

Participation frequency 10

2019 Club Membership 12

Member Golf Association Reporting 12

Definitions 13

Profile of Australian Clubs 14

Overall club numbers for 2019 14

Key Observations 14

10-year member club trend 15

10-year social club trend 15

Playing Members - 2019 Results 16

Member numbers for 2019 16

Five-year overall member totals 16

Club member participation rate 17

Five-year member club totals 17

Historical membership trends 18

Playing Members - Key Segments 19

Members by club type 19

Members by state 20

Members by club size 21

Members by gender 22

Junior members 24

MyGolf Program 25

Level of movement by club size 26

Total member movement by golf district 26

Annual member attraction & attrition 27

Playing Members -

Results by State-Based Districts 28

NSW 29

VIC 30

QLD 31

WA 32

SA 33

TAS 34

Playing Member Age Profile 36

Average age 36

Age pyramid - members versus population by gender 36

Age breakdown by various cohorts 37

New member age profile 37

Competition Rounds 38

Total competition rounds 38

Average competition rounds per member 38

Average competition rounds per member by age 39

9-hole competition rounds 40

Key Observations 40

Annual Programs 42

Community Instructor Program 43

Disability Inclusion Program 44

Leadership and governance 44

The Australian All Abilities Championship 44

Education and workforce development 44

Participation 44

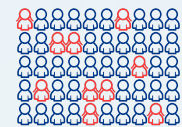
COVER PHOTO: Blind Golf Australia Clinic
2019 ISPS Handa Women's Australian Open / The Grange GC
Photo: Golf Australia / David Brand

TOTAL CLUB MEMBERS

383,794

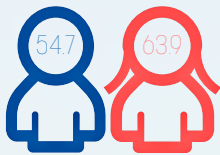
0.05% 1-year trend

-0.8% 5-year trend



20%

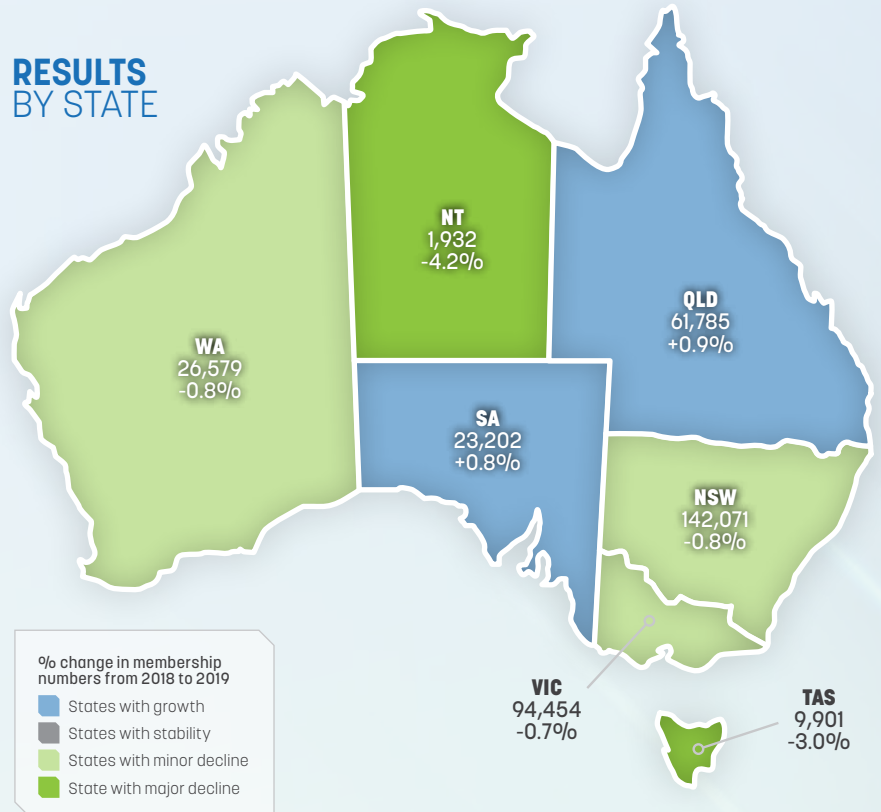
FEMALE MEMBERS
make up 20% of club membership numbers



56.3

AVERAGE AGE
reported for club members

RESULTS BY STATE



TOTAL GOLF PARTICIPANTS (15+ years old)

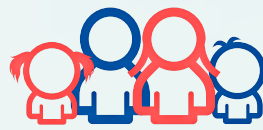
878,000

-14% 2019 vs 2018

4.2% % adult pop.

OVERALL PARTICIPATION RATE

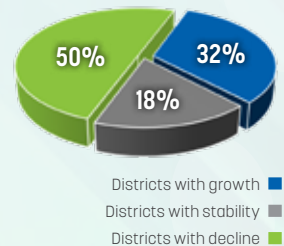
1.7%



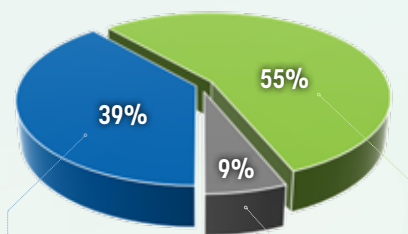
Adults
1.8%

Juniors
0.5%

CHANGE IN MEMBERS BY DISTRICT



AUSTRALIAN CLUB MEMBERS

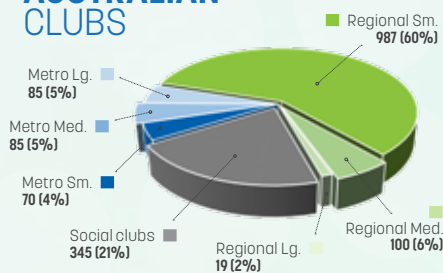


+8.8% **23,870** Social club members
345 clubs

148,122 Metropolitan club members
205 clubs

-0.2% **211,802** Regional club members
1,106 clubs

AUSTRALIAN CLUBS



838 clubs with 9-hole rounds

392,114 9-hole rounds

+33% 2019 vs 2018

COMPETITION ROUNDS PLAYED

10.534 million **+2%** 2019 vs 2018

27.5 rounds per player **26.9** in 2018



13,127 junior members

+2.7% 2019 vs 2018 **4.4%** % all members

01

Key Findings

Golf Australia is pleased to present to you the 2019 National Golf Club Participation Report.

The key findings from 2019 are outlined as follows:

An estimated 878,000 adults (15+ years old) participated in golf at least once for 2019 according to data from AusPlay. This equates to 4.2% of the adult population, down from 5.2% in 2016.

Whilst overall participation is falling, the frequency mix is shifting, with at least fortnightly participation now reflecting two thirds of all participants, up from 58% in 2016.

81% of member clubs are classified as 'small', having less than 500 members.

84% of member clubs (1,105 / 1,311) clubs in Australia are located in a regional area

National membership numbers across Australia were reported as 383,794. This result represented a 0.05% net increase from 2018, the first annual increase recorded since 1998.

40% of clubs experienced a net increase in membership numbers (significant growth or moderate growth) in 2019, with 19% experiencing growth of greater than 5%.

Small clubs have incurred the largest declines in membership, -1.8% over 2018 and an average of -2.6% over the past five-year period.

With 73 golf districts reported across the six states, 32% of these districts experienced membership growth of more than 1% over 2018. 18% reported stable outcomes and 50% reported declines of more than 1%.

The overall national movement for metropolitan clubs was a decline of 0.9%, in line with the average annual decline recorded over the past five years.

The overall national movement for regional clubs was a decline of 0.2%, a positive outcome against the long-term five year trend of -1.2% for regional clubs.

Steady growth has been recorded in social club member numbers of the past five-year period, growing by an average of 3.6% per year to now account for 6.2% of total club members across Australia.

The national gender mix remained steady at 80/20 male to female. Western Australia has the highest percentage of female members at 22%.

Representing 3.4% of total membership numbers, reported junior members (under the age of 18) totalled 13,127 in 2019, increasing by 349 members over 2018.

With over 30,000 new members recorded for 2019, a resultant national new club member attraction rate of 9% was recorded.

The average reported age of club members across the country is 56.3 years. In terms of gender, the average age of male members (54.7 years) is nine years younger than females (63.9 years).

52% of new members were under the age of 50 compared to 28% across all members.

For the same club dataset there were 10.534 million competition rounds played in 2019, a 2% increase over 2018. Average annual rounds played on a per member basis increased in 2019 from 26.9 rounds to 27.5 rounds.

838 clubs (64%) recorded 9-hole rounds in 2019, playing a total of 392,114 9-hole rounds, an increase of 33% over 9-hole rounds played in 2018.



GolfAustralia

02 Report Background

Golf Australia continues to provide the wider golf industry with information that enables the sport to understand the current landscape and trends with regard to golf participation.

This 7th edition of the National Club Participation Report is a key component in Golf Australia's industry formation communication strategy.

This report remains 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 and club long term sustainability.



Par 4, 16th Hole / East Course / The Grange Golf Club, SA
Photo: The Grange Golf Club / David Brand

03 **Broader Golf Participation Trends**



Fitness / Wellness related activities continue on an upward trajectory with a 32% increase over the last 4 periods for Pilates & Yoga

AusPlay Data Introduction

In April 2020, the results of the latest (2019) 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 four 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.

All sports

Participation increases were recorded in a number of activities/sports for 2019. Fitness / Wellness related activities continue on an upward trajectory with a +32% increase over last 4 periods for Pilates & Yoga. A 17% increase was reported for Fitness & Gym activities.

The traditional sports of Swimming, Cycling, Basketball, Netball and AFL all record increases over the four year period.

Table 1: AusPlay National Participation Survey data

Activity	2016	2017	2018	2019	% change
	Estimate (000s)	Estimate (000s)	Estimate (000s)	Estimate (000s)	
Walking (Recreational)	8,649.0	8,516.2	9,145.3	8,959.9	4%
Bush walking	1,198.5	1,158.0	1,165.6	1,309.6	9%
Fitness/Gym	6,479.6	6,764.4	7,131.9	7,591.7	17%
Athletics (incl jogging/ running)	3,105.0	3,071.9	3,086.0	3,406.5	10%
Sub total	19,432.1	19,510.5	20,528.8	21,267.7	9%
Swimming	2,908.5	2,918.0	3,128.2	3,249.5	12%
Cycling	2,325.6	2,250.9	2,381.0	2,376.6	2%
Football/soccer	1,143.6	1,108.5	1,006.2	1,086.3	-5%
Tennis	926.4	922.7	885.1	854.9	-8%
Golf	1,024.9	978.6	955.9	877.9	-14%
Basketball	689.2	707.1	700.8	765.4	11%
Netball	603.1	592.2	517.3	681.5	13%
Australian football	499.9	468.6	584.9	550.2	10%
Surfing	514.2	482.1	480.1	523.7	2%
Sub total	10,635.4	10,428.7	10,639.5	10,966.0	3%
Yoga	876.0	939.7	1,090.4	1,119.2	28%
Pilates	497.3	577.3	678.8	696.1	40%
Sub total	1,373.3	1,517.0	1,769.2	1,815.3	32%

Source: AusPlay

Golf participation trends

With seven bi-annual survey periods complete for AusPlay, longer term trends can be established. The latest AusPlay data relates to the 2019 calendar year.

An estimated 878,000 adults (15+ years old) participated in golf for 2019. This equates to 4.2% of the adult population, down from 5.2% in 2016.

The decline recorded since 2016 is entirely sourced to the male gender. The male participation rate has fallen from 8.6% to 6.8% with the female participation rate steady at approximately 2%. As a result, female market share has risen from 18% share of total market in 2016 to 21% in 2019.

Participation frequency

Although overall participation is falling, AusPlay data indicates the frequency mix is shifting. Frequency of at least fortnightly has been trending upwards for the past four years, now reflecting two thirds of all participants.

As a result, the more than fortnightly (less frequent) cohort has declined by 31% over the period, compared to only a 3% decline in the at least fortnightly cohort. These results are summarised in Chart 2.

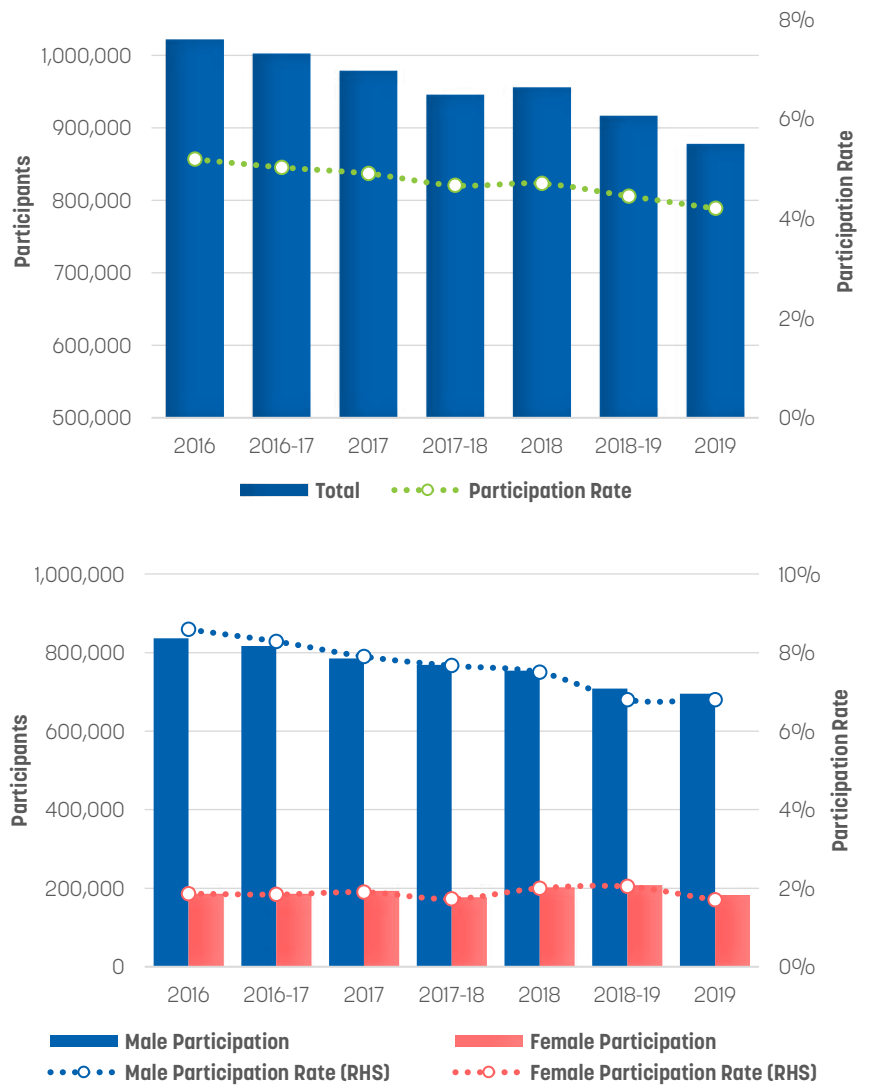


Chart 1: Annual golf participants by gender and overall participation rate
Source: AusPlay

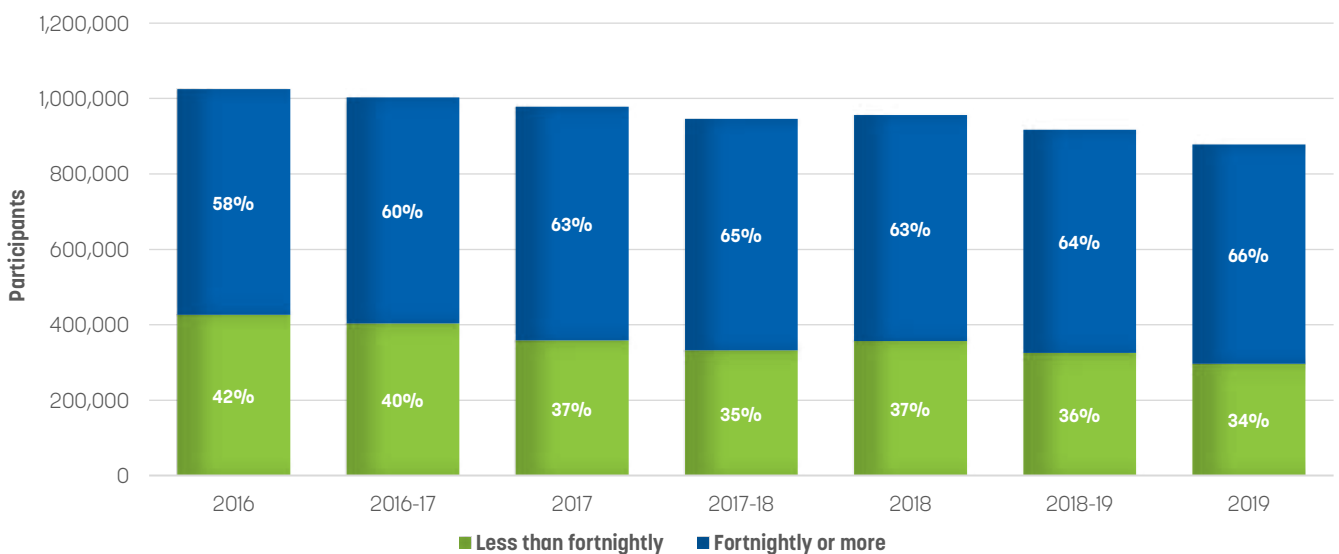


Chart 2: Annual golf participants by frequency
Source: AusPlay



'Dog Day' / The Royal Adelaide Golf Club, SA
Photo: Royal Adelaide Golf Club / David Brand

04 2019 Club Membership

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. Individuals that have a membership (and pay a capitation fee) at more than one club will therefore be counted in the reported figures multiple times.

The respective reporting periods and the respective membership timing they represent are summarised in Table 2.

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 2019.

Table 2: State reporting periods and membership timing

State	MGA Annual Report	Data Collected	Numbers relate to...
NSW/ACT *	2018/19	May/June 2019	Most recent completed financial year
VIC	2019	December 2019	Most recent completed financial year
QLD	2019	December 2019	Point in time of collection
SA	2018/19	December 2019	Point in time of collection
WA	2018/19	December 2019	Point in time of collection
TAS	2019	June 2019	Point in time of collection
NT	2018/19	September 2019	Point in time of collection

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



Definitions

The following terms, which are referenced in various places throughout the report, are defined as follows:

- MEMBER CLUBS:** clubs that are fully affiliated with the relevant state bodies
- SOCIAL CLUBS:** registered clubs without full affiliation, which typically play in allotted tee times at public courses
- SMALL CLUBS:** Member clubs with 500 or fewer members
- MEDIUM CLUBS:** Member clubs with 501 to 1,000 members
- LARGE CLUBS:** Member clubs with over 1,000 members

Profile of Australian Clubs

Overall club numbers for 2019

1,656 clubs reported membership numbers for 2019.

Table 1 summarises the profile of golf clubs, classified by general geographic location, club type and club size.

There are 345 social clubs affiliated to various state bodies, accounting for 21% of total clubs.

The current club size profile by general geographic area for 2019 is outlined in Table 3.

Key Observations

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

- 79% of clubs are member clubs, totalling 1,311 clubs.
- 64% of member clubs are classified as 'small', having less than 500 members.
- 84% of member clubs (1,106 / 1,311) clubs in Australia are located in a regional area, with 89% of those clubs being classified as 'small'.
- 24% of clubs in metropolitan areas are classified as 'large', having over 1,000 members. This compares to just 2% in regional areas.



Table 3: Club size profile by geographic area

	NSW	VIC	QLD	WA	SA	TAS	NT	Total	% of segment	% of total
Metropolitan										
Small clubs	30	13	4	10	11	2	0	70	34%	4%
Medium clubs	42	20	6	9	6	2	0	85	41%	5%
Large clubs	15	18	7	5	5	0	0	50	24%	3%
Total metro	87	51	17	24	22	4		205	100%	12%
Regional										
Small clubs	223	241	176	158	121	58	10	987	89%	60%
Medium clubs	48	21	26	2	1	1	1	100	9%	6%
Large clubs	10	5	4	0	0	0	0	19	2%	2%
Total regional	281	267	206	160	122	59	11	1,106	100%	67%
Total										
Small clubs	253	254	180	168	132	60	10	1,057	81%	64%
Medium clubs	90	41	32	11	7	3	1	185	14%	11%
Large clubs	25	23	11	5	5	0	0	69	5%	4%
Total member clubs	368	318	223	184	144	63	11	1,311	100%	79%
Total social clubs	23	120	1	126	73	2	0	345		21%
Total clubs	391	438	224	310	217	65	11	1,656		100%

Source: Golf Australia & member golf associations

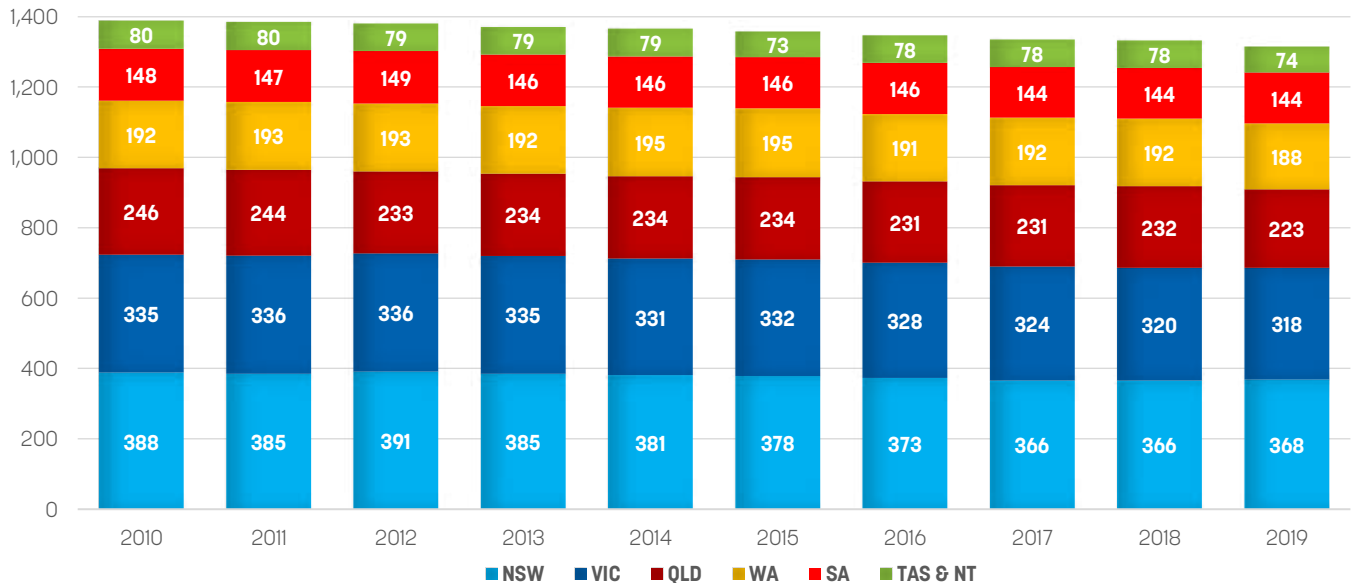
NB: Small clubs are defined as having 500 or less members, medium clubs 501 to 1,000 members, and large clubs over 1,000 members

NB: Whilst having 23 Social clubs, total member numbers within these clubs are not yet reported by Golf NSW

10-year member club trend

As reported above, there are currently 1,311 member clubs in Australia. There has been a steady decline in member clubs over the past 10-year period, from a high of 1,390 in 2010. These results by state are summarised in Chart 3.

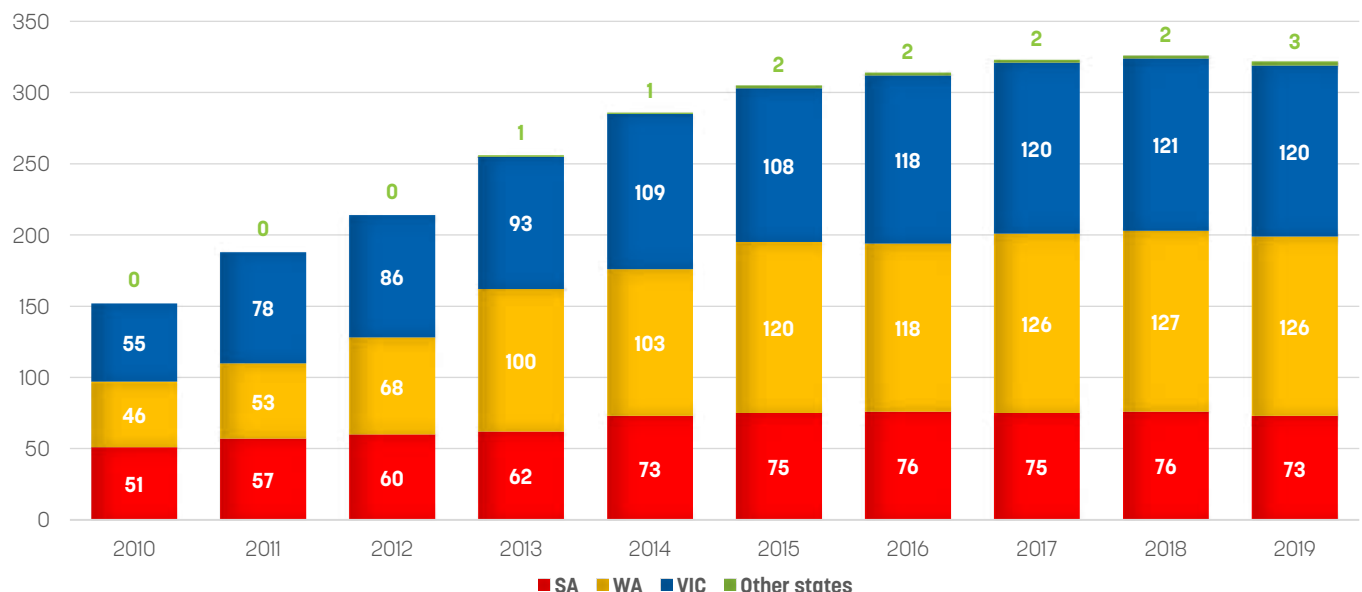
Chart 3: Member club count
Source: Golf Australia & member golf associations



10-year social club trend

There are currently 322 social clubs reporting membership numbers in Australia. Over the past ten years there has been a sizeable increase in social clubs, increasing from 152 in 2010. Since 2015 as further 16 clubs have been added. Results by state are summarised in Chart 4.

Chart 4: Social club count





"...the first reported increase in club member numbers since 1998."

Playing Members - 2019 Results

Member numbers for 2019

National membership numbers across Australia are reported as 383,794. This result represents a 0.05% increase (181 members) when measured against total 2018 results. Whilst small, this annual increase is the first reported increase in club member numbers since 1998.

While overall results reflected little change, movement was evident with the key market segments. For member clubs, there was a decline in member numbers of 0.5% (1,747 members) while for social clubs, member numbers increased by just under 9% (+1,928 members) to now account for 6% of total members.

When assessed by gender, male members increased by 0.2%, supported by the social club member growth, while female members declined by 0.7%. Junior numbers accounted for 3% of the market, increasing by 349 members and helping to offset the losses in total adult members. These outcomes are summarised in Table 4.

Table 4: 2019 overall

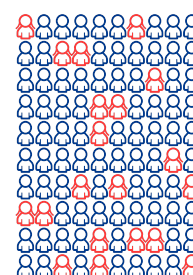
Cohort	2018	2019	% Share	Change from 2018	
				Actual	%
Member clubs	361,671	359,924	94%	-1,747	-0.5%
Social clubs	21,942	23,870	6%	1,928	8.8%
Males	306,319	307,011	80%	692	0.2%
Females	77,294	76,783	20%	-511	-0.7%
Adults	370,835	370,667	97%	-168	0.0%
Juniors	12,778	13,127	3%	349	2.7%
Overall	383,613	383,794	100%	181	0.05%

Source: Golf Australia and member golf associations

Five-year overall member totals

Table 5 summarises 2019 outcomes contextualised by the broader five-year trend.

For all categories except Juniors the rate of decline slowed in 2019 when compared to the five-year trend. Growth in Social club numbers in 2019 was over double the average annual result for the five-year period.



Female members make up 20% of club membership numbers

Table 5: Five-year member totals

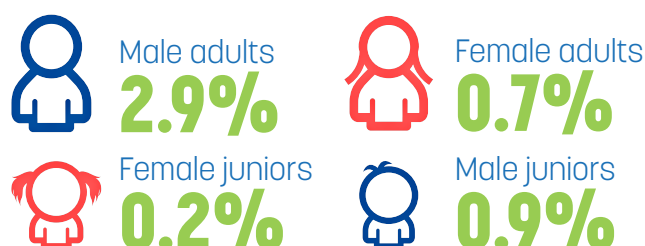
Cohort	2015	2016	2017	2018	2019	% change	
						From 2018	5 yr avg
Member clubs	376,387	372,673	367,602	361,671	359,924	-0.5%	-1.1%
Social clubs	20,720	21,573	22,069	21,942	23,870	8.8%	3.6%
Males	316,306	315,829	312,112	306,319	307,011	0.2%	-0.7%
Females	80,801	78,417	77,559	77,294	76,783	-0.7%	-1.3%
Adults	387,100	380,450	376,147	370,835	370,667	0.0%	-1.1%
Juniors	10,007	13,796	13,524	12,778	13,127	2.7%	7.0%
Overall	397,107	394,246	389,671	383,613	383,794	0.0%	-0.8%

Source: Golf Australia and member golf associations

Club member participation rate

For 2019 the overall participation rate (members excluding from social clubs as a percentage of population 10+ years) across Australia is 1.7%.

This rate varies significantly across different cohorts, ranging from as high as 2.9% for male adults down to 0.2% for female juniors. These results are summarised in the right infographic and Chart 5.



Five-year member club totals

Accounting for 94% of the market, results for total member clubs are further broken down by region and size. While both metropolitan and regional club member numbers declined by 0.9% and 0.2% respectively, results by club size varied materially.

Small clubs, accounting for 37% of the market, experienced a decline in members of 1.8% in 2019.

Medium clubs were effectively unchanged in 2019, a positive result against the -0.9% average annual decline recorded over the past five years. Large size clubs, accounting for 26% of the market, recorded annual growth near in line with the category's five-year trend. These results are summarised in Table 6.

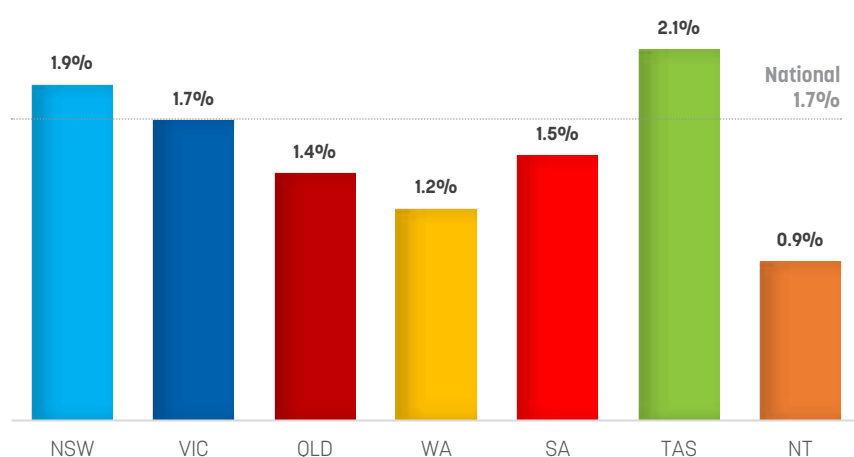


Chart 5: Participation rate by states

Source: Golf Australia, member golf associations & Australian Bureau of Statistics
NB. Population figures exclude people aged under 10 years

Table 6: Five-year members by member club type

Member club type	2015	2016	2017	2018	2019	% change	
						From 2018	5 yr avg
Metropolitan	153,794	152,353	150,691	149,420	148,122	-0.9%	-0.9%
Regional	222,593	220,320	216,911	212,251	211,802	-0.2%	-1.2%
Small	149,649	145,633	141,462	136,897	134,420	-1.8%	-2.6%
Medium	136,463	135,254	133,544	131,413	131,591	0.1%	-0.9%
Large	90,275	91,786	92,596	93,361	93,913	0.6%	1.0%
Overall	376,387	372,673	367,602	361,671	359,924	-0.5%	-1.1%

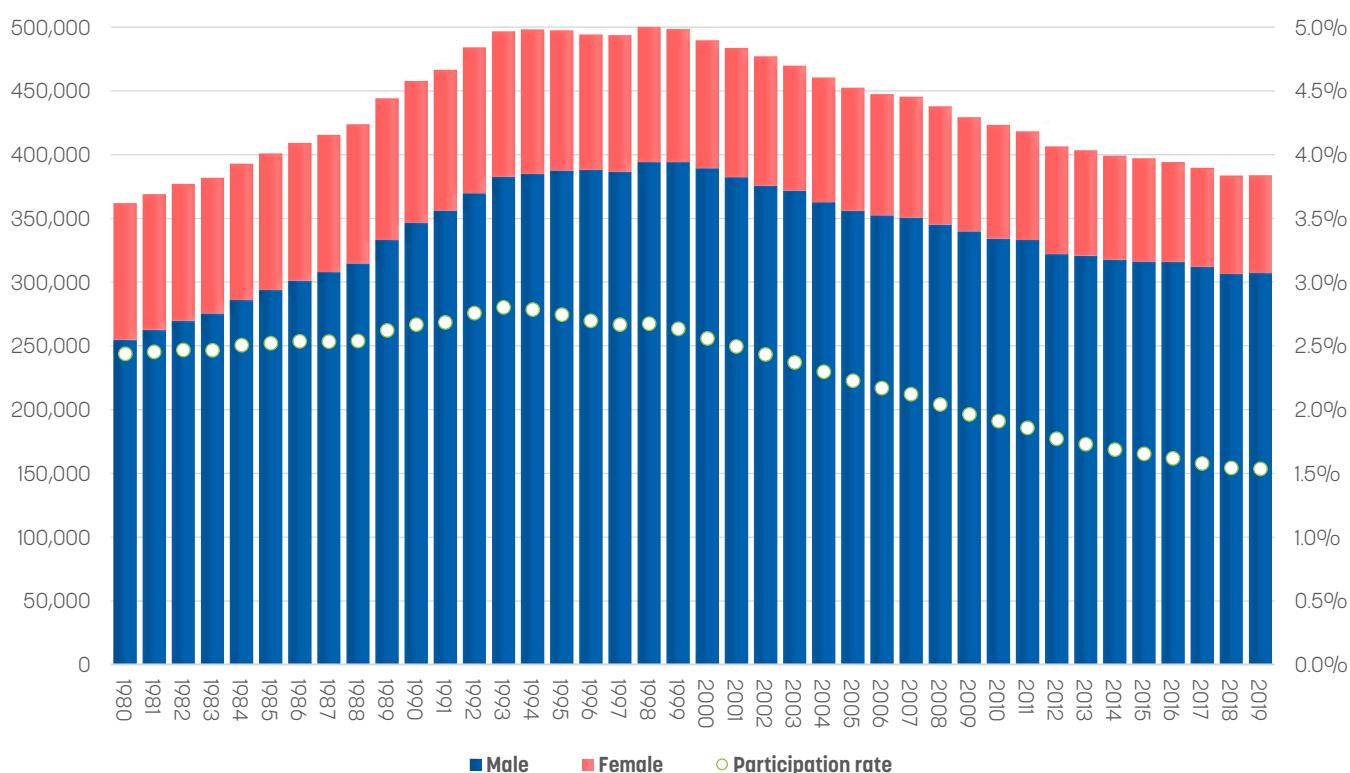
Source: Golf Australia & member golf associations
NB: The table above excludes social clubs.

Historical membership trends

History shows that club membership numbers peaked in Australia in 1998 at approximately 500,000 golfers, declining steadily since to by an average of 1.3% per annum. There has also been a decline in the proportion of female members, from a high of 30% in 1980 down to the current level at 20%. Similarly, the participation rate (total members as a proportion of total population) has declined from 2.4% in 1980 to the present level of 1.7% in 2019.



Chart 6: Historical members and participation
 Source: Golf Australia, Australian Bureau of Statistics
 NB. Population figures exclude people aged under 10 years



Playing Members - Key Segments



The overall national movement in total member clubs was a decline of 0.5%.

Members by club type

The overall national movement in 2019 for member clubs (aggregate of metropolitan and regional clubs, and excluding social clubs) was a decline of 0.5%. This is slightly lower than the average annual decline of 1.1% recorded since 2015.

Queensland and South Australia both experienced increased in 2019 at 0.9% and 0.8% respectively, the latter driven by growth in social clubs affiliated in that state. These results are summarised in Table 7.

Social club numbers continued to grow in 2019, recording an 8.8% increase over 2018, more than double the 5-year annual average rate. Growth was most evident in clubs affiliated in South Australia, with approximately 1,400 new members added. Growth of 2% or more was also seen in Victoria and Western Australia, both states with significant social club representation.

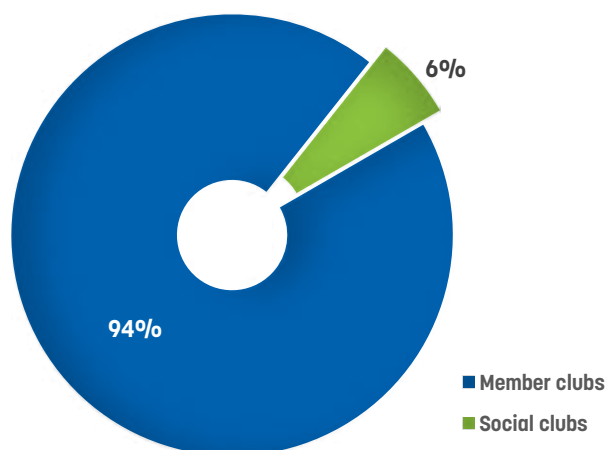


Chart 7: 2019 share of total members by club type
Source: Golf Australia, member golf associations

Table 7: Member clubs

State	2015	2016	2017	2018	2019	% change	
						From 2018	5 yr avg
NSW	149,999	147,307	145,353	143,246	142,071	-0.8%	-1.3%
VIC	96,648	97,762	96,231	95,160	94,454	-0.7%	-0.6%
QLD	64,837	63,383	63,478	61,216	61,785	0.9%	-1.2%
WA	27,822	27,615	26,491	26,801	26,579	-0.8%	-1.1%
SA	24,063	23,729	23,732	23,022	23,202	0.8%	-0.9%
TAS	10,705	10,705	10,280	10,209	9,901	-3.0%	-1.9%
NT	2,313	2,172	2,037	2,017	1,932	-4.2%	-4.4%
Overall	376,387	372,673	367,602	361,671	359,924	-0.5%	-1.1%

Source: Golf Australia, member golf associations

Table 8: Social clubs

State	2015	2016	2017	2018	2019	% change	
						From 2018	5 yr avg
VIC	12,895	12,590	11,957	10,935	11,288	3.2%	-3.3%
QLD	425	371	306	286	267	-6.6%	-11.0%
WA	5,617	5,583	5,856	6,047	6,186	2.3%	2.4%
SA	1,759	3,005	3,919	4,645	6,071	30.7%	36.3%
TAS	24	24	31	29	58	100.0%	24.7%
Overall	20,720	21,573	22,069	21,942	23,870	8.8%	3.6%

Source: Golf Australia, member golf associations

NB: Whilst there are 24 social clubs in New South Wales, member numbers at these clubs are not yet reported.

NB: There are no affiliated social clubs in the Northern Territory.

Members by state

The overall national movement in 2019 for metropolitan clubs was a decline of 0.9%, consistent with the average annual decline recorded since 2015. All losses in the metropolitan markets occurred in the Eastern seaboard states. These results are summarised in Table 9.

The overall national movement in 2019 for regional clubs was a decline of 0.2%, lower than the average annual decline of 1.2% recorded since 2015. Queensland was the only state to experience an increase in regional club members, with a 1.7% increase. These results are summarised in Table 10.

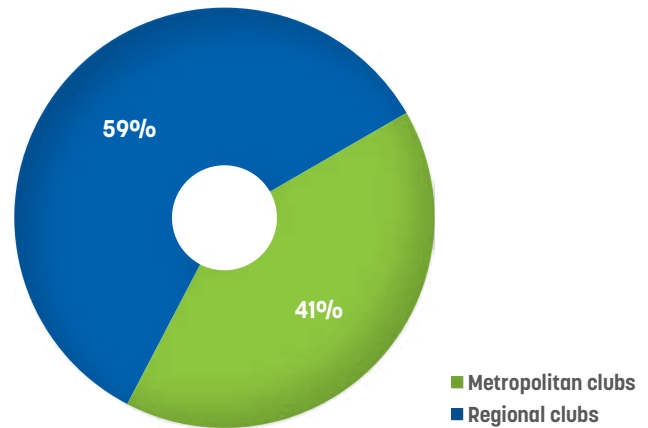


Chart 8: 2019 share of total members by general geographic area

Source: Golf Australia, member golf associations

Table 9: Metropolitan clubs

State	2015	2016	2017	2018	2019	% change	
						From 2018	5 yr avg
NSW	63,251	62,072	61,097	60,903	60,104	-1.3%	-1.3%
VIC	44,265	44,201	43,831	43,452	42,940	-1.2%	-0.8%
QLD	14,653	14,737	14,904	14,532	14,322	-1.4%	-0.6%
WA	16,457	16,235	15,545	15,818	15,942	0.8%	-0.8%
SA	12,990	12,902	13,074	12,534	12,731	1.6%	-0.5%
TAS	2,178	2,206	2,240	2,181	2,083	-4.5%	-1.1%
Overall	153,794	152,353	150,691	149,420	148,122	-0.9%	-0.9%

Source: Golf Australia, member golf associations
NB. This table excludes social clubs.

Table 10: Regional clubs

State	2015	2016	2017	2018	2019	% change	
						From 2018	5 yr avg
NSW	86,748	85,235	84,256	82,343	81,967	-0.5%	-1.4%
VIC	52,383	53,561	52,400	51,708	51,514	-0.4%	-0.4%
QLD	50,184	48,646	48,574	46,684	47,463	1.7%	-1.4%
WA	11,365	11,380	10,946	10,983	10,637	-3.2%	-1.6%
SA	11,073	10,827	10,658	10,488	10,471	-0.2%	-1.4%
TAS	8,527	8,499	8,040	8,028	7,818	-2.6%	-2.1%
NT	2,313	2,172	2,037	2,017	1,932	-4.2%	-4.4%
Overall	222,593	220,320	216,911	212,251	211,802	-0.2%	-1.2%

Source: Golf Australia, member golf associations
NB. This table excludes social clubs.

Members by club size

Membership numbers at small member clubs (500 or less members) declined by 1.8% against 2018. Queensland was the only state to experience an increase in club members in this cohort. These results are summarised in Table 11.

Membership numbers at medium sized member clubs (501 to 1,000 members) increased marginally over 2018. Queensland, Western Australia, South Australia and Northern Territory all experienced greater than 1% increases in member numbers at medium sized clubs. These results are summarised in Table 12.

Membership numbers at large member clubs (over 1,000 members) increased by 0.6% in 2019. All states increased an increase in member numbers across their large club cohort. These results are summarised in Table 13.

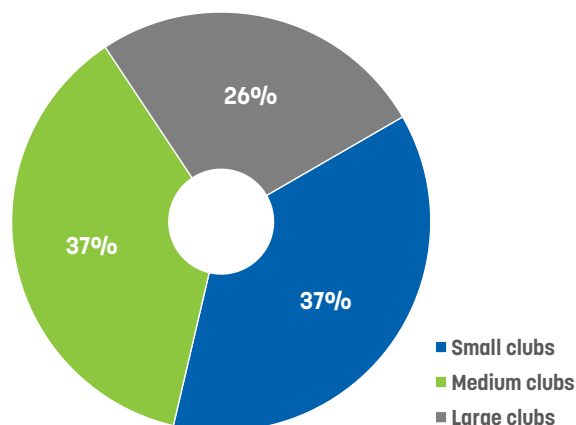


Chart 9: 2019 share of total members by club size
Source: Golf Australia, member golf associations

Table 11: Small clubs (500 or fewer members)

State	2015	2016	2017	2018	2019	% change	
						From 2018	5 yr avg
NSW	48,023	45,517	44,073	42,579	41,312	-3.0%	-3.7%
VIC	36,198	36,424	35,109	34,410	33,968	-1.3%	-1.6%
QLD	28,696	27,275	27,326	25,429	25,475	0.2%	-2.9%
WA	13,646	13,595	12,926	12,807	12,412	-3.1%	-2.3%
SA	12,885	12,490	12,294	11,962	11,921	-0.3%	-1.9%
TAS	8,668	8,814	8,298	8,311	8,063	-3.0%	-1.8%
NT	1,533	1,518	1,436	1,399	1,269	-9.3%	-4.6%
Overall	149,649	145,633	141,462	136,897	134,420	-1.8%	-2.6%

Source: Golf Australia, member golf associations
NB. This table excludes social clubs.

Table 12: Medium clubs (501 to 1,000 members)

State	2015	2016	2017	2018	2019	% change	
						From 2018	5 yr avg
NSW	68,837	67,744	66,826	65,502	65,220	-0.4%	-1.3%
VIC	29,294	29,519	28,550	28,499	28,205	-1.0%	-0.9%
QLD	22,296	22,310	22,594	22,230	22,663	1.9%	0.4%
WA	8,172	8,163	8,054	7,884	8,003	1.5%	-0.5%
SA	5,047	4,973	4,937	4,782	4,999	4.5%	-0.2%
TAS	2,037	1,891	1,982	1,898	1,838	-3.2%	-2.5%
NT	780	654	601	618	663	7.3%	-4.0%
Overall	136,463	135,254	133,544	131,413	131,591	0.1%	-0.9%

Source: Golf Australia, member golf associations
NB. This table excludes social clubs.

Table 13: Large clubs (over 1,000 members)

State	2015	2016	2017	2018	2019	% change	
						From 2018	5 yr avg
NSW	33,139	34,046	34,454	35,165	35,539	1.1%	1.8%
VIC	31,156	31,819	32,572	32,251	32,281	0.1%	0.9%
QLD	13,845	13,798	13,558	13,557	13,647	0.7%	-0.4%
WA	6,004	5,857	5,511	6,110	6,164	0.9%	0.7%
SA	6,131	6,266	6,501	6,278	6,282	0.1%	0.6%
Overall	90,275	91,786	92,596	93,361	93,913	0.6%	1.0%

Source: Golf Australia, member golf associations
NB. This table excludes social clubs.

Members by gender

Total reported male members increased by 0.2% in 2019. This outcome was driven by a strong outcome in the social club market, with male members increasing by 11.7%. These results are summarised in Table 14.

Female member numbers declined by 0.7% over 2018, a rate near half the annual average recorded for the past 5 years. Victoria, Western Australia and South Australia all experienced an increase in female member numbers from 2018. Female social club losses were almost

all attributable to the RACV affiliate club program in Victoria. These results are summarised in Table 15.

The resultant gender mix reported for 2019 remains unchanged from 2018, that being 80% male, 20% female. Female share of member numbers is above the national average in Western Australia (22%) and Victoria (21%) and also typically larger in regional markets (21%) and at larger clubs (22%). These results are summarised in Chart 10.



+0.2%

Total reported
male members
increased by
0.2% in 2019

■ Table 14: Male members

State / Cohort	2015	2016	2017	2018	2019	% change	
						From 2018	5 yr avg
NSW	120,219	118,604	116,690	115,170	114,276	-0.8%	-1.3%
VIC	85,796	87,552	85,761	83,745	83,337	-0.5%	-0.7%
QLD	52,481	51,219	51,513	48,810	49,612	1.6%	-1.4%
WA	26,309	26,056	25,418	25,724	25,633	-0.4%	-0.6%
SA	20,726	21,636	22,485	22,712	24,231	6.7%	4.0%
TAS	8,865	8,952	8,532	8,498	8,308	-2.2%	-1.6%
NT	1,910	1,810	1,713	1,660	1,614	-2.8%	-4.1%
Member clubs	299,549	298,013	293,851	288,492	287,092	-0.5%	-1.1%
Social clubs	16,757	17,816	18,261	17,827	19,919	11.7%	4.4%
Overall	316,306	315,829	312,112	306,319	307,011	0.2%	-0.7%

Source: Golf Australia, member golf associations

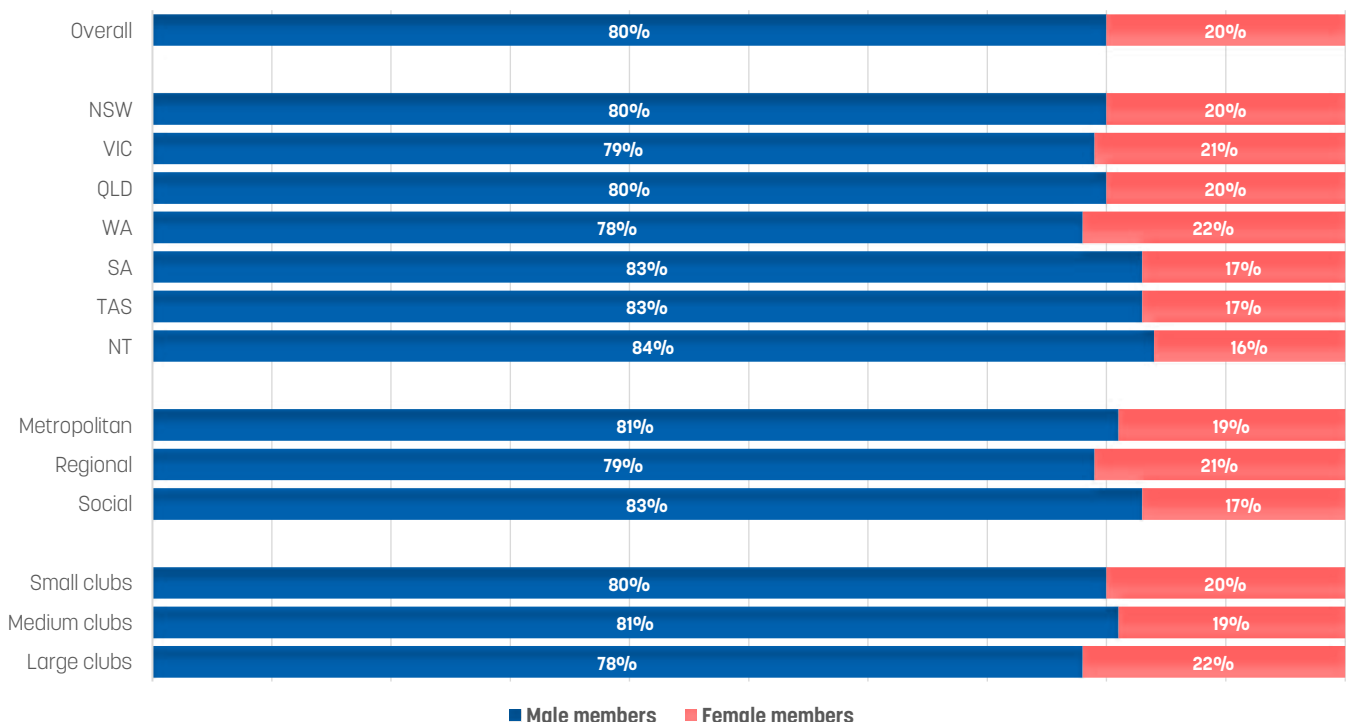
■ Table 15: Female members

State / Cohort	2015	2016	2017	2018	2019	% change	
						From 2018	5 yr avg
NSW	29,780	28,703	28,663	28,076	27,795	-1.0%	-1.7%
VIC	23,747	22,800	22,427	22,350	22,405	0.2%	-1.4%
QLD	12,781	12,535	12,271	12,692	12,440	-2.0%	-0.7%
WA	7,130	7,142	6,929	7,124	7,132	0.1%	0.0%
SA	5,096	5,098	5,166	4,955	5,042	1.8%	-0.3%
TAS	1,864	1,777	1,779	1,740	1,651	-5.1%	-3.0%
NT	403	362	324	357	318	-10.9%	-5.8%
Member clubs	76,838	74,660	73,751	73,179	72,832	-0.5%	-1.3%
Social clubs	3,963	3,757	3,808	4,115	3,951	-4.0%	-0.1%
Overall	80,801	78,417	77,559	77,294	76,783	-0.7%	-1.3%
% of total	20.3%	19.9%	19.9%	20.1%	20.0%		

Source: Golf Australia, member golf associations

Chart 10: Gender proportion by states and cohorts

Source: Golf Australia, member golf associations

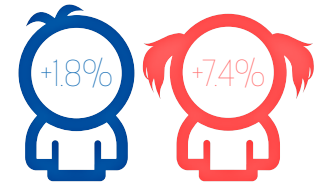


Junior members

Reported junior members (under the age of 18) totalled 13,127 in 2019, which represents an increase of 2.7% from 2018. This positive result was driven by the reported outcome in Queensland, where there was an increase of 36% in junior members (counting methodology change). Overall junior members represent 3.4% of the total member count across the country. These results are summarised in Table 16.

Junior representation was slightly higher at regional clubs (3.8%) than metropolitan clubs (3.4%). By gender, male juniors represent a slightly higher proportion of total males (3.5%) than junior females of total females; (3.1%).

Junior representation outcomes by state and gender are represented in Chart 11.



+2.7%

Total reported
junior members
increased by
2.7% in 2019

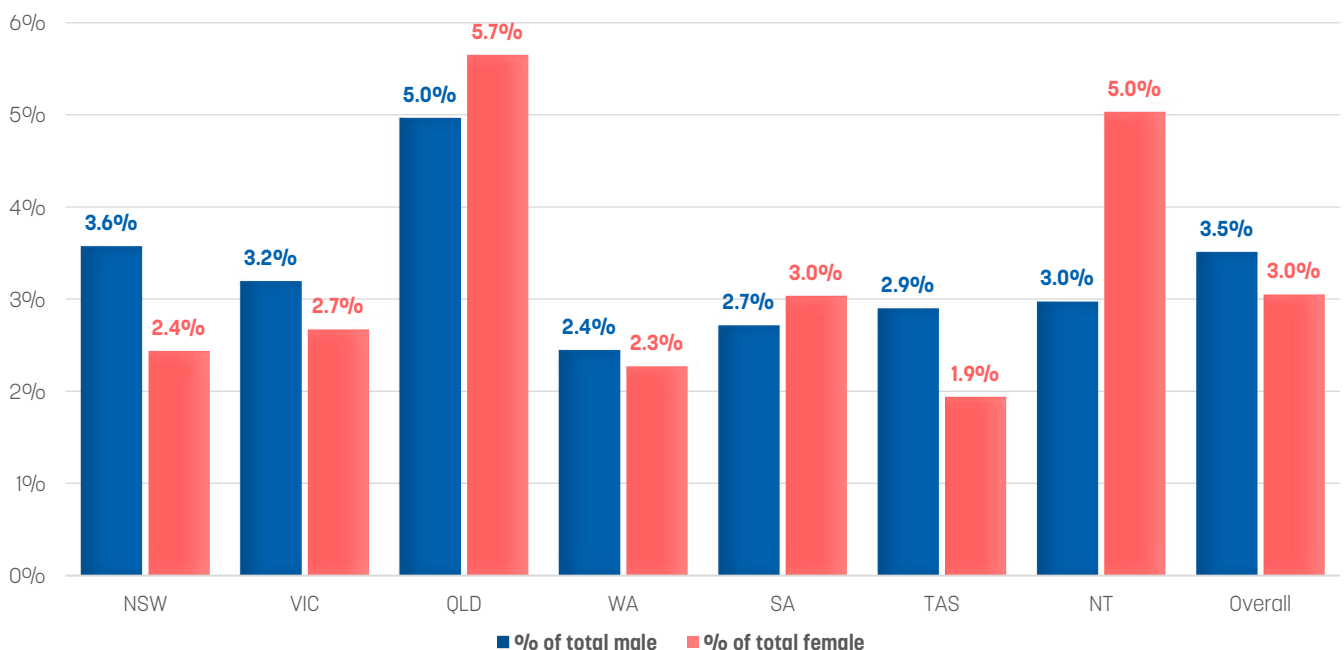
Table 16: Junior members by state/cohort

State / Cohort	2015	2016	2017	2018	2019	% change	
						From 2018	5 yr avg
NSW	5,823	5,654	5,349	4,929	4,762	-3.4%	-4.9%
VIC	3,755	3,804	3,597	3,438	3,261	-5.1%	-3.5%
QLD	2,182	2,225	2,442	2,331	3,167	35.9%	9.8%
WA	885	915	878	854	789	-7.6%	-2.8%
SA	729	786	848	821	811	-1.2%	2.7%
TAS	300	328	328	330	273	-17.3%	-2.3%
NT	88	84	82	75	64	-14.7%	-7.7%
Metropolitan	5,667	5,117	4,979	4,727	4,964	5.0%	5.6%
Regional	8,195	8,576	8,439	7,929	8,008	1.0%	7.5%
Social	22	103	106	122	155	27.0%	66.8%
Male	11,877	11,706	11,486	10,599	10,786	1.8%	5.9%
Female	2,133	2,090	2,038	2,179	2,341	7.4%	13.3%
Overall	13,762	13,796	13,524	12,778	13,127	2.7%	-1.2%
% of total	3.7%	3.5%	3.4%	3.3%	3.4%		

Source: Golf Australia, member golf associations

Chart 11: Junior proportion of total members by gender

Source: Golf Australia





MyGolf Program

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.

The MyGolf program reached a record high of 24,139 registrations in the 2018/19 year against a target of 20,600 registrations nationally. The total number reflects a growth of 43% compared to 2018, a huge milestone as the program aims to reach 30,000 registrations.

Female participation KPIs were set for the first time, reflecting the percentage difference when compared to male participation. The final female participation figure reached 24.6% of the national total, just shy of the 25% target. In 2019/20, MyGolf aims to reach a national total of 28%, with the launch of MyGolf Girls to ensure that centres are catering for girls only programs and providing the right atmosphere for female participants.

MyGolf participation numbers and total centres delivering this program for the past five years are summarised in Table 17 and Table 18.

Table 17: MyGolf participation numbers

State / Cohort	2014-15	2015-16	2016-17	2017-18	2018-19	% change	
						1 Year	5 Year
NSW	550	1,290	1,806	3,523	4,192	19%	66%
VIC	1,273	1,982	3,191	4,805	5,425	13%	44%
QLD	720	1,486	2,254	4,660	10,032	115%	93%
WA	343	695	827	1,695	1,808	7%	52%
SA	305	571	954	1,121	1,381	23%	46%
TAS	128	61	405	752	914	22%	63%
NT	158	169	237	281	377	34%	24%
Overall	3,480	6,254	9,674	16,837	24,129	43%	62%
Total Girls	776	1,661	2,354	3,976	5,956	50%	66%
Girls %	22%	27%	24%	24%	25%		

Source: Golf Australia

Table 18: MyGolf active centres

State / Cohort	2014-15	2015-16	2016-17	2017-18	2018-19	% change	
						1 Year	5 Year
NSW	40	83	65	107	108	-28%	22%
VIC	64	74	84	112	127	-15%	17%
QLD	39	44	56	80	81	-10%	13%
WA	10	16	31	45	48	7%	32%
SA	11	17	28	29	39	11%	32%
TAS	12	7	14	17	18	-10%	6%
NT	2	4	4	4	4	-43%	7%
Overall	211	304	427	497	425	-14%	19%
Registered Centres	354	475	608	727	903	27%	25%

Source: Golf Australia



Level of movement by club size

40% of clubs experienced a net increase in membership numbers (significant growth or moderate growth) in 2019, with 19% experiencing growth of greater than 5%. Member count stability was more prevalent in Large clubs with greater movement (less stability) evident in Small clubs. Results by club size are summarised in Chart 12.

Levels of movement are scaled according to club size as follows:

Significant growth / decline

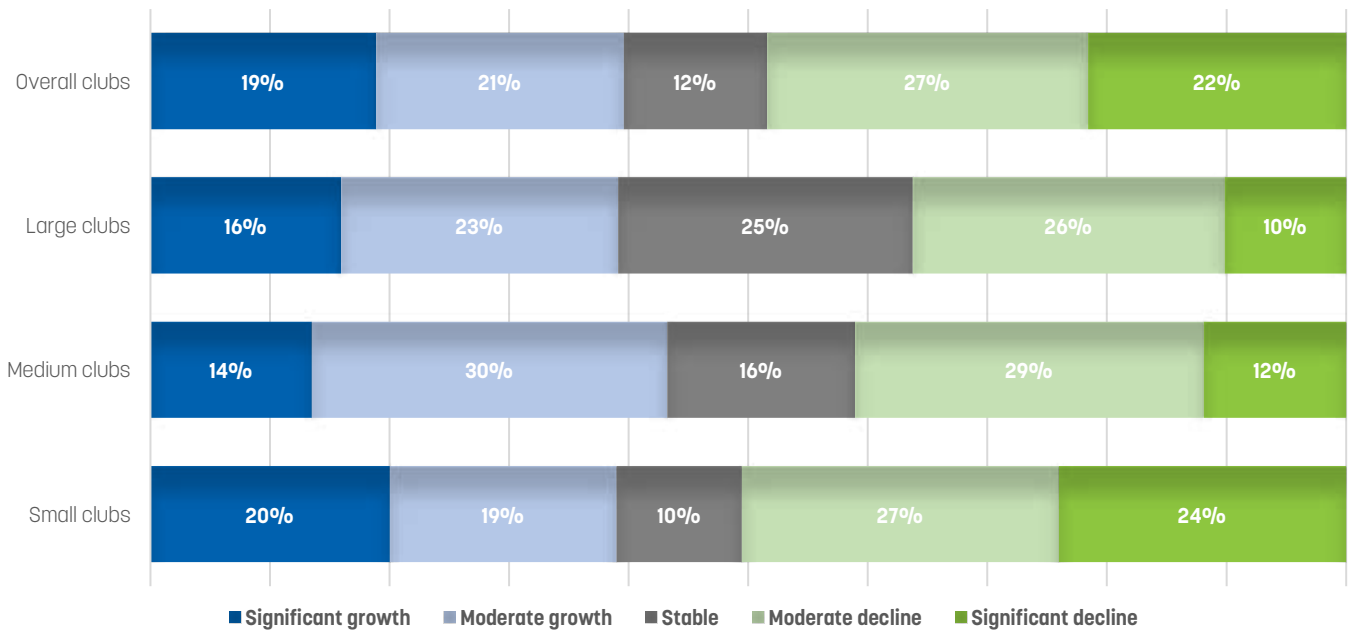
Small clubs > 10%

Medium clubs > 7.5%

Large clubs > 5%

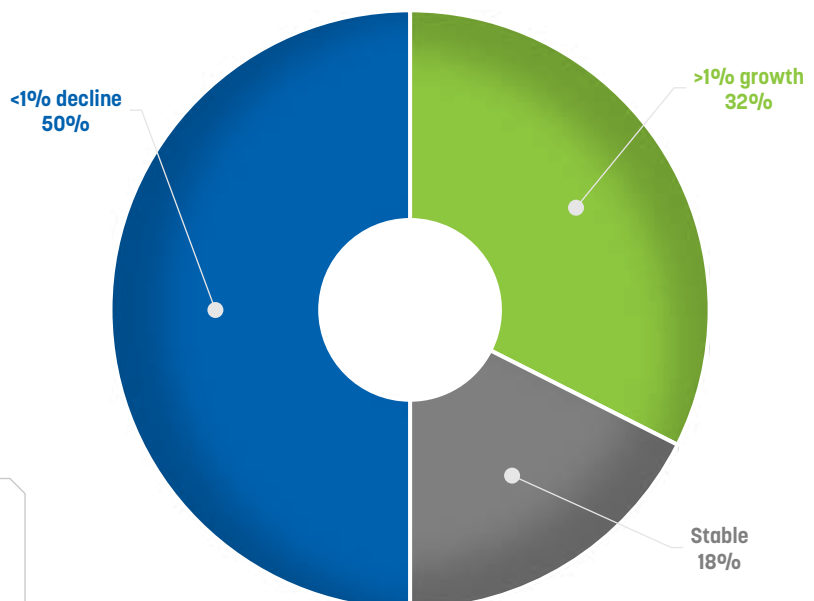
Stable is defined as movement of less than 1% for all club size cohorts

Chart 12: Level of movement by club size
Source: Golf Australia, member golf associations



Total member movement by golf district

There are a total of 73 defined golf districts across Australia. For 2019, 32% of these districts experienced membership growth of more than 1% over 2018 with 50% experiencing a decline of more than 1%. These results are summarised in Chart 13.



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.

Chart 13: Change in members by district



new members

9%

For 2019 the
**new club member
attraction rate**
was 9%

I Annual member attraction & attrition

Utilising data from GolfLink, annual national club (excluding social clubs) attraction and attrition rates can be reported. With a refreshed methodology that utilises active round counts, new member counts (defined as being a golf club member playing more than 1 round of golf) are assessed against closing member counts for the 2018 and 2019 years allowing for these rates to be accurately calculated.

Table 19 depicts the relevant attraction and attrition rates for metropolitan and regional clubs, as well as the overall result. With over 30,000 new members recorded for 2019, the analysed data indicates a resultant national new club

member attraction rate of 9% and a national member attrition rate of 11%. Attrition rates are generally higher at regional clubs.

Table 20 depicts the relevant attraction and attrition rates by Club size. Similar to the table above, attrition rates tend to be higher at the smaller clubs (<500 members). New member attraction rates tend to also be higher at these clubs.

These tables collectively illustrate that there is material new annual demand evident for golf club memberships in Australia. If attrition rates could be slowed to below 10%, national member numbers could begin to grow again.

Table 19: Attraction and attrition rates by state / region

State	Metropolitan		Regional		Total	
	Attraction	Attrition	Attraction	Attrition	Attraction	Attrition
NSW	9%	10%	9%	11%	9%	11%
VIC	8%	10%	9%	10%	9%	10%
QLD	10%	10%	12%	13%	11%	12%
SA	8%	9%	8%	9%	8%	9%
WA	8%	9%	9%	11%	9%	10%
TAS	-	-	8%	9%	8%	9%
NT	-	-	13%	16%	13%	16%
Overall	9%	10%	9%	11%	9%	11%

Table 20: Attraction and attrition rates by state / club size

State	Small		Medium		Large		Total	
	Attraction	Attrition	Attraction	Attrition	Attraction	Attrition	Attraction	Attrition
NSW	9%	13%	9%	10%	7%	8%	9%	11%
VIC	9%	11%	8%	10%	8%	8%	9%	10%
QLD	12%	14%	12%	11%	7%	9%	11%	12%
SA	8%	10%	8%	9%	7%	8%	8%	9%
WA	10%	12%	8%	11%	7%	4%	9%	10%
TAS	8%	9%	4%	7%	-	-	8%	9%
NT	14%	18%	9%	12%	-	-	13%	16%
Overall	9%	12%	9%	10%	7%	8%	9%	11%



Playing Members - Results by State-Based Districts

NSW

9 of the 21 districts in NSW experienced a net increase in membership numbers in 2019. These results are summarised in Table 21.



Table 21: New South Wales districts

Region	2015	2016	2017	2018	2019	% Change	
						From 2018	5 Year Avg.
Riverina	1,760	1,681	1,762	1,740	1,828	5.1%	1.0%
Illawarra	9,175	8,820	8,372	8,454	8,803	4.1%	-1.0%
Western Riverina	2,741	2,806	2,661	2,501	2,597	3.8%	-1.3%
Far South Coast	5,321	5,171	5,403	5,060	5,208	2.9%	-0.5%
Western	2,056	2,005	1,862	1,733	1,781	2.8%	-3.5%
Central Coast	6,942	6,994	7,048	6,315	6,443	2.0%	-1.8%
Northern Rivers	7,643	7,650	7,582	7,344	7,481	1.9%	-0.5%
Mid North Coast	5,161	4,531	4,476	4,352	4,382	0.7%	-4.0%
Lower North Coast	4,806	4,710	4,628	4,775	4,792	0.4%	-0.1%
Central Western	3,628	3,598	3,542	3,431	3,411	-0.6%	-1.5%
Metropolitan	63,251	62,072	61,097	60,903	60,104	-1.3%	-1.3%
Lachlan Valley	884	854	827	822	811	-1.3%	-2.1%
Murray	5,619	6,315	7,027	7,151	7,049	-1.4%	5.8%
ACT-Monaro	9,092	8,855	8,369	8,169	7,962	-2.5%	-3.3%
Hunter River	4,191	3,848	3,941	4,021	3,888	-3.3%	-1.9%
North West	1,080	1,116	1,016	976	938	-3.9%	-3.5%
Newcastle	8,885	8,621	8,460	8,569	8,199	-4.3%	-2.0%
South West	1,407	1,318	1,291	1,243	1,182	-4.9%	-4.3%
Central North	2,599	2,626	2,422	2,364	2,238	-5.3%	-3.7%
Blue Mountains	2,332	2,288	2,136	1,990	1,796	-9.7%	-6.3%
New England	1,426	1,428	1,431	1,333	1,178	-11.6%	-4.7%
NSW Total	149,999	147,307	145,353	143,246	142,071	-0.8%	-1.3%

Source: Golf Australia

VIC

6 of the 16 districts in Victoria experienced an increase in member numbers in 2019. These results are summarised in Table 22.

% change in membership numbers from 2018 to 2019

- Change greater than 5%
- Change 1% to 5%
- Change less than 1%
- Change -1% to -5%
- Change greater than -5%

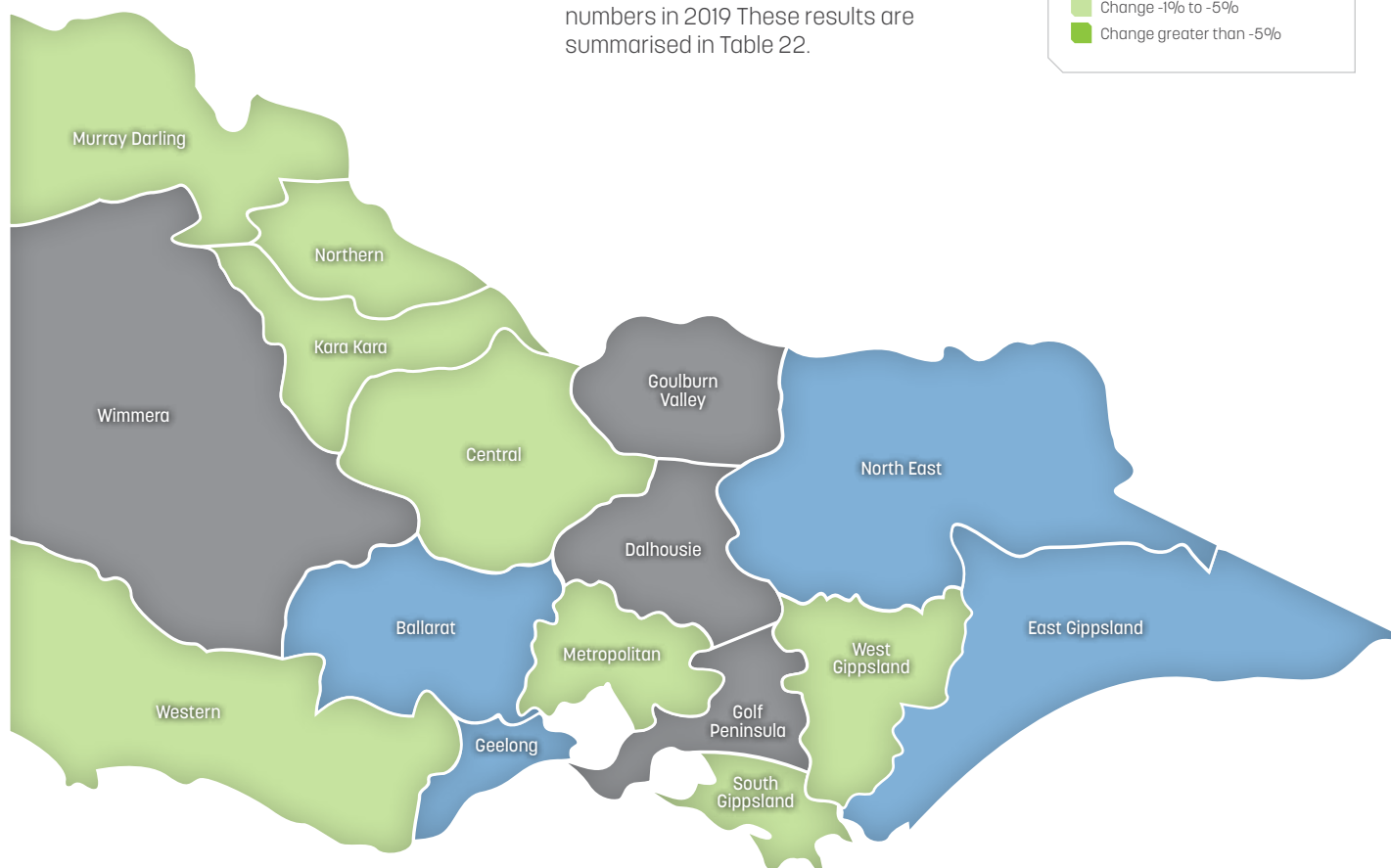


Table 22: Victorian districts

Region	2015	2016	2017	2018	2019	% Change	
						From 2018	5 Year Avg.
North East	5,057	5,348	4,850	4,817	4,968	3.1%	-0.4%
Geelong	10,084	10,472	10,562	10,626	10,774	1.4%	1.7%
Ballarat	3,371	3,398	3,294	3,398	3,444	1.4%	0.5%
East Gippsland	2,579	2,502	2,474	2,377	2,408	1.3%	-1.7%
Dalhousie	2,014	1,991	1,930	1,936	1,940	0.2%	-0.9%
Golf Peninsula	6,934	7,565	7,471	7,498	7,500	0.0%	2.0%
Goulburn Valley	3,489	3,745	3,680	3,646	3,640	-0.2%	1.1%
Wimmera	2,059	2,008	1,902	1,772	1,766	-0.3%	-3.8%
Metropolitan	43,856	43,806	43,443	43,079	42,544	-1.2%	-0.8%
Northern	1,378	1,436	1,501	1,360	1,341	-1.4%	-0.7%
South Gippsland	2,291	2,474	2,416	2,341	2,288	-2.3%	0.0%
West Gippsland	3,488	3,437	3,569	3,458	3,332	-3.6%	-1.1%
Central	2,817	2,754	2,615	2,556	2,455	-4.0%	-3.4%
Western	3,649	3,466	3,408	3,360	3,219	-4.2%	-3.1%
Kara Kara	460	451	402	389	371	-4.6%	-5.2%
Murray Darling	2,713	2,514	2,326	2,174	2,068	-4.9%	-6.6%
VIC Total	96,239	97,367	95,843	94,787	94,058	-0.8%	-0.6%

Source: Golf Australia

QLD

7 of the 14 districts in Queensland experienced an increase in membership numbers in 2019. These results are summarised in Table 23.

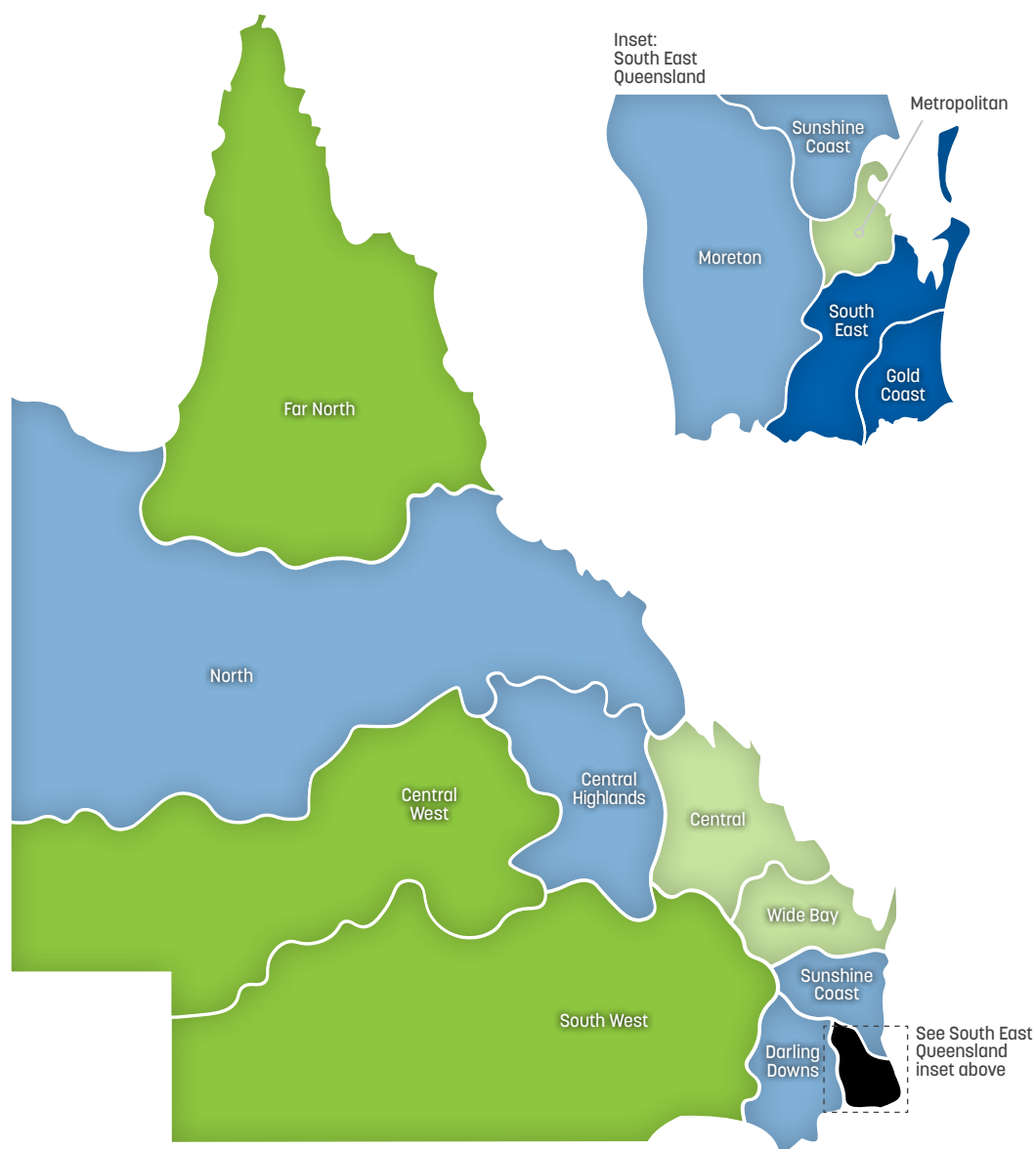


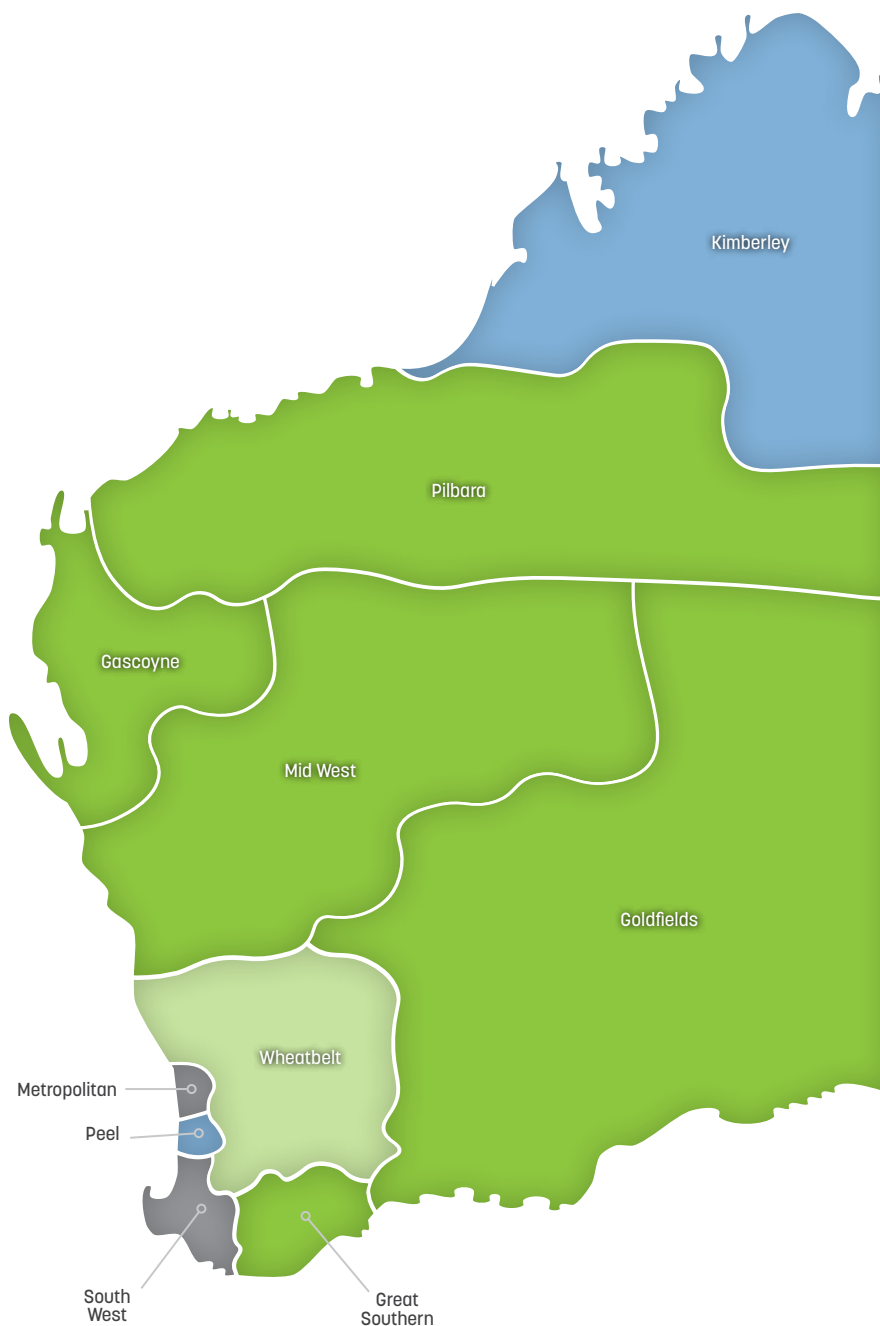
Table 23: Queensland districts

Region	2015	2016	2017	2018	2019	% Change	
						From 2018	5 Year Avg.
South East	4,465	4,835	4,864	4,571	4,925	7.7%	2.5%
Gold Coast	10,810	9,981	10,069	8,560	9,177	7.2%	-4.0%
North	4,274	4,108	4,175	4,154	4,360	5.0%	0.5%
Central Highlands	1,382	1,285	1,180	1,096	1,139	3.9%	-4.7%
Moreton	2,200	2,011	2,016	2,038	2,110	3.5%	-1.0%
Darling Downs	3,839	3,749	3,699	3,546	3,603	1.6%	-1.6%
Sunshine Coast	12,587	12,435	12,710	12,664	12,811	1.2%	0.4%
Central	3,272	3,121	2,972	3,005	2,967	-1.3%	-2.4%
Metropolitan	14,653	14,737	14,904	14,532	14,322	-1.4%	-0.6%
Wide Bay	3,242	3,103	3,027	3,083	3,027	-1.8%	-1.7%
South West	811	799	720	692	657	-5.1%	-5.1%
Far North	3,032	2,952	2,898	3,037	2,506	-17.5%	-4.7%
Central West	270	267	244	238	180	-24.4%	-9.6%
QLD Total	64,837	63,383	63,478	61,216	61,784	0.9%	-1.2%

Source: Golf Australia

IWA

3 of the 10 districts in Western Australia experienced an increase in member numbers in 2019. These results are summarised in Table 24.



% change in membership numbers from 2018 to 2019

- Change greater than 5%
- Change 1% to 5%
- Change less than 1%
- Change -1% to -5%
- Change greater than -5%

Table 24: Western Australia districts

Region	2015	2016	2017	2018	2019	% Change	
						From 2018	5 Year Avg.
Peel	717	765	685	655	682	4.1%	-1.2%
Kimberley	451	410	380	411	423	2.9%	-1.6%
Metropolitan	16,457	16,235	15,545	15,818	15,942	0.8%	-0.8%
South-West	3,943	4,029	3,997	4,041	4,018	-0.6%	0.5%
Wheatbelt	2,399	2,241	2,193	2,132	2,042	-4.2%	-3.9%
Great Southern	1,301	1,394	1,380	1,381	1,305	-5.5%	0.1%
Goldfields	975	892	793	862	808	-6.3%	-4.6%
Pilbara	432	433	402	412	378	-8.3%	-3.3%
Mid West	1,017	1,084	999	972	885	-9.0%	-3.4%
Gascoyne	130	132	117	117	96	-17.9%	-7.3%
WA Total	27,822	27,615	26,491	26,801	26,579	-0.8%	-1.1%

Source: Golf Australia

SA

5 of the 9 districts in South Australia experienced an increase in membership numbers in 2019. These results are summarised in Table 25.

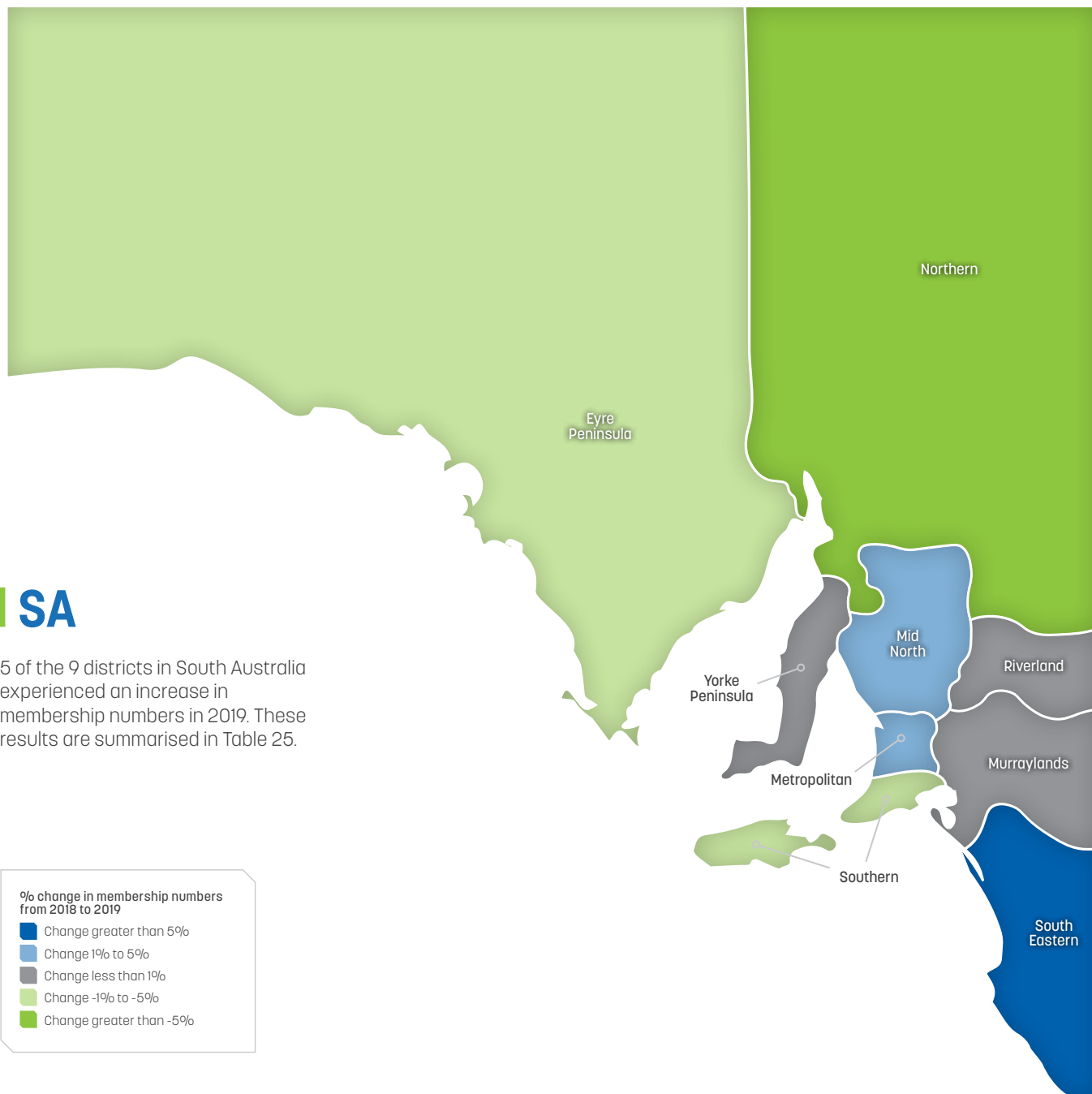
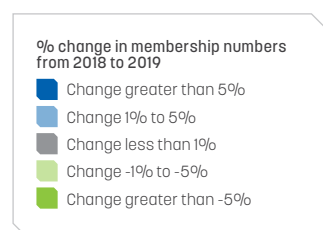


Table 25: South Australia districts

Region	2015	2016	2017	2018	2019	% Change	
						From 2018	5 Year Avg.
South Eastern	1,630	1,650	1,671	1,631	1,773	8.7%	2.1%
Mid North	1,384	1,421	1,421	1,423	1,453	2.1%	1.2%
Metropolitan	12,990	12,902	13,074	12,534	12,731	1.6%	-0.5%
Yorke Peninsula	982	972	1,019	974	977	0.3%	-0.1%
Riverland	590	528	516	520	521	0.2%	-3.1%
Murraylands	702	665	609	607	605	-0.3%	-3.6%
Southern	3,607	3,449	3,427	3,380	3,305	-2.2%	-2.2%
Eyre Peninsula	1,226	1,182	1,081	1,051	1,008	-4.1%	-4.8%
Northern	952	960	914	902	829	-8.1%	-3.4%
SA Total	24,063	23,729	23,732	23,022	23,202	0.8%	-0.9%

Source: Golf Australia

TAS

The North district of Tasmania was the only district to experience an increase in member numbers in 2019. These results are summarised in Table 26.

% change in membership numbers from 2018 to 2019

- Change greater than 5%
- Change 1% to 5%
- Change less than 1%
- Change -1% to -5%
- Change greater than -5%

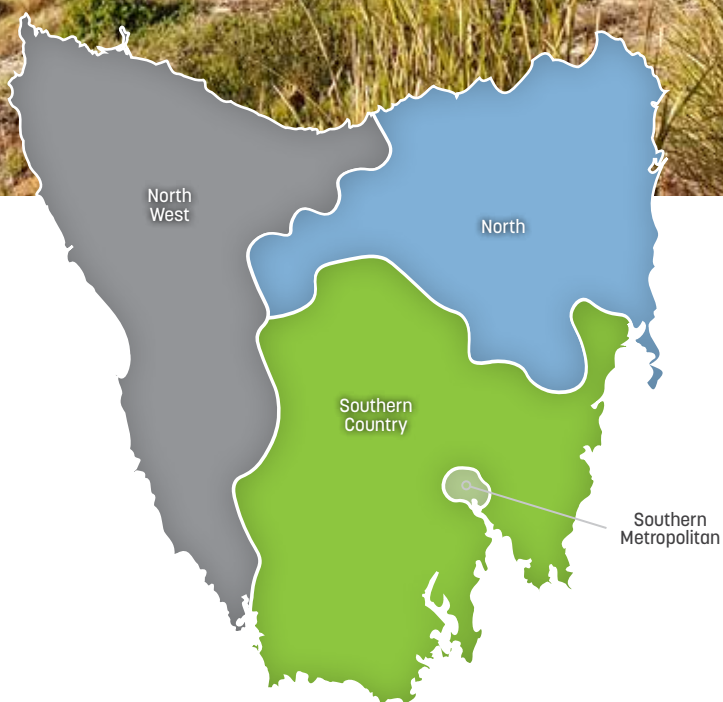


Table 26: Tasmania districts

Region	2015	2016	2017	2018	2019	% Change	
						From 2018	5 Year Avg.
North	3,270	3,316	3,141	3,104	3,158	1.7%	-0.9%
North West	2,348	2,318	2,155	2,101	2,094	-0.3%	-2.8%
Southern Metropolitan	2,178	2,206	2,240	2,181	2,083	-4.5%	-1.1%
Southern Country	2,909	2,865	2,744	2,823	2,566	-9.1%	-3.1%
TAS Total	10,705	10,705	10,280	10,209	9,901	-3.0%	-1.9%

Source: Golf Australia

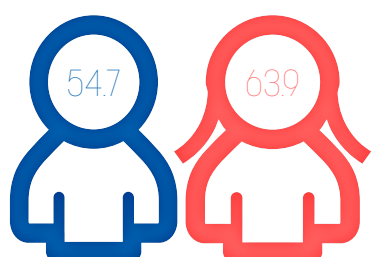


Stephanie Na (AUS) / 1st Hole, The Grange Golf Club
2019 ISPS Handa Women's Australian Open
Photo: The Grange Golf Club / David Brand

Playing Member Age Profile

Average age

The average reported age of club members across Australia is 56.3 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 54.7 years, nine years younger than the average female age of 63.9 years.



56.3

Average age reported for club members

Age pyramid - members versus population by gender

Chart 15 illustrates the current mix of club members by gender 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 - 38% of male members and 55% of female members - versus a lower national population share of this cohort of only 17%.

Chart 14: Average age by state

Source: GOLF Link

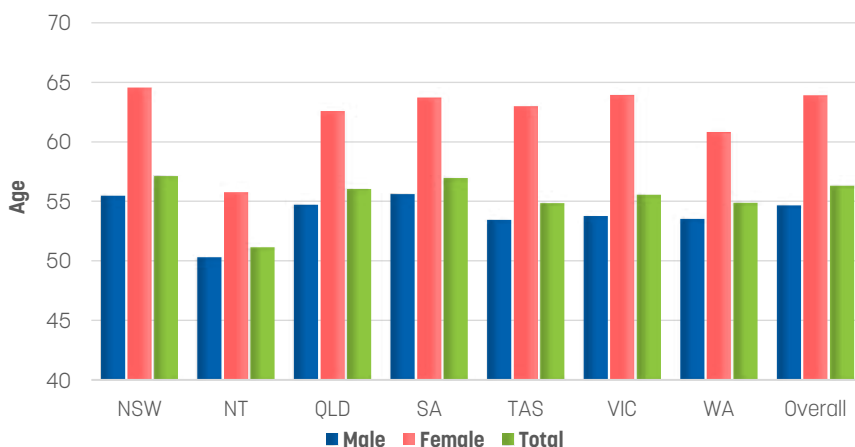
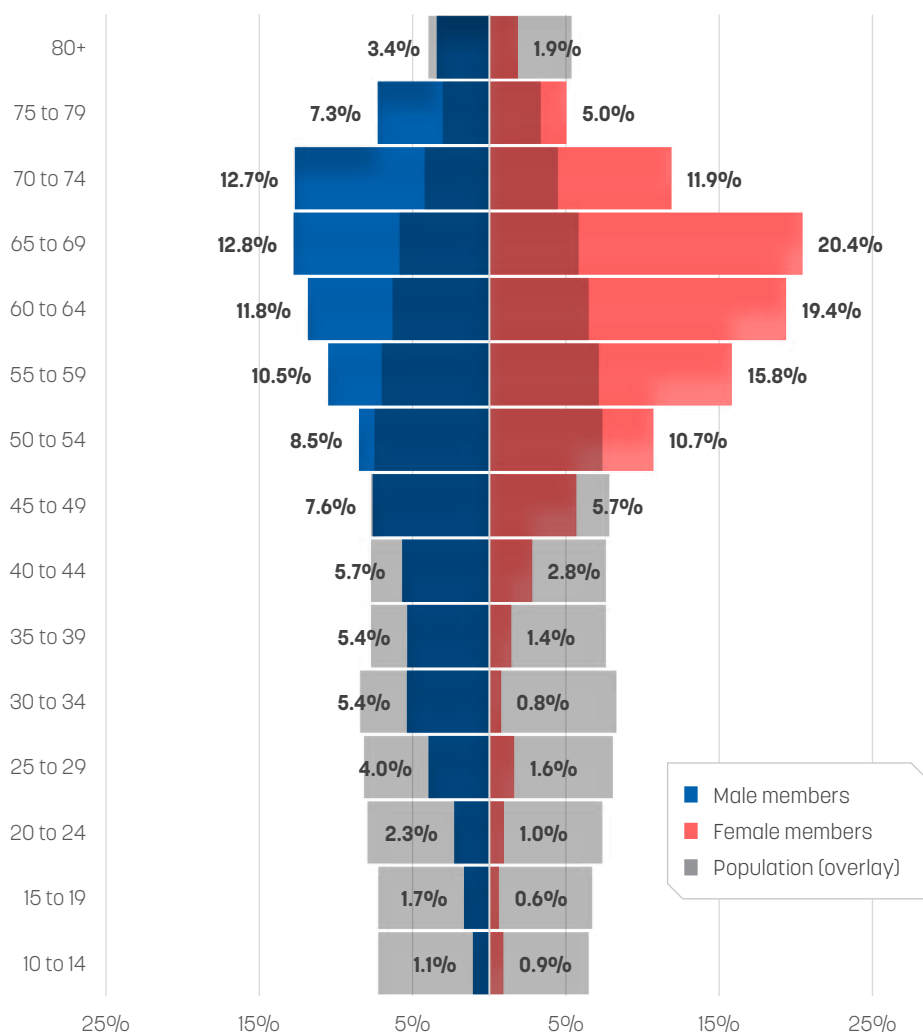


Chart 15: Age pyramid - members versus population

Source: GOLF Link



Age breakdown by various cohorts

To provide context for the data above, Chart 11 data represents the age breakdown across various cohorts - club type, gender and state. A similar age profile is evident for member clubs and social clubs, while an older profile is evident for female members. There is little variation evident by state. These results are summarised in Chart 16.

New member age profile

New members to club golf generally exhibit a younger age profile than the broader club member age profile. In 2019 52% of new members were under the age of 50 compared to 28% across all members. These results are summarised in Chart 17.

Chart 16: Age breakdown by various cohorts

Source: GOLF Link, AusPlay

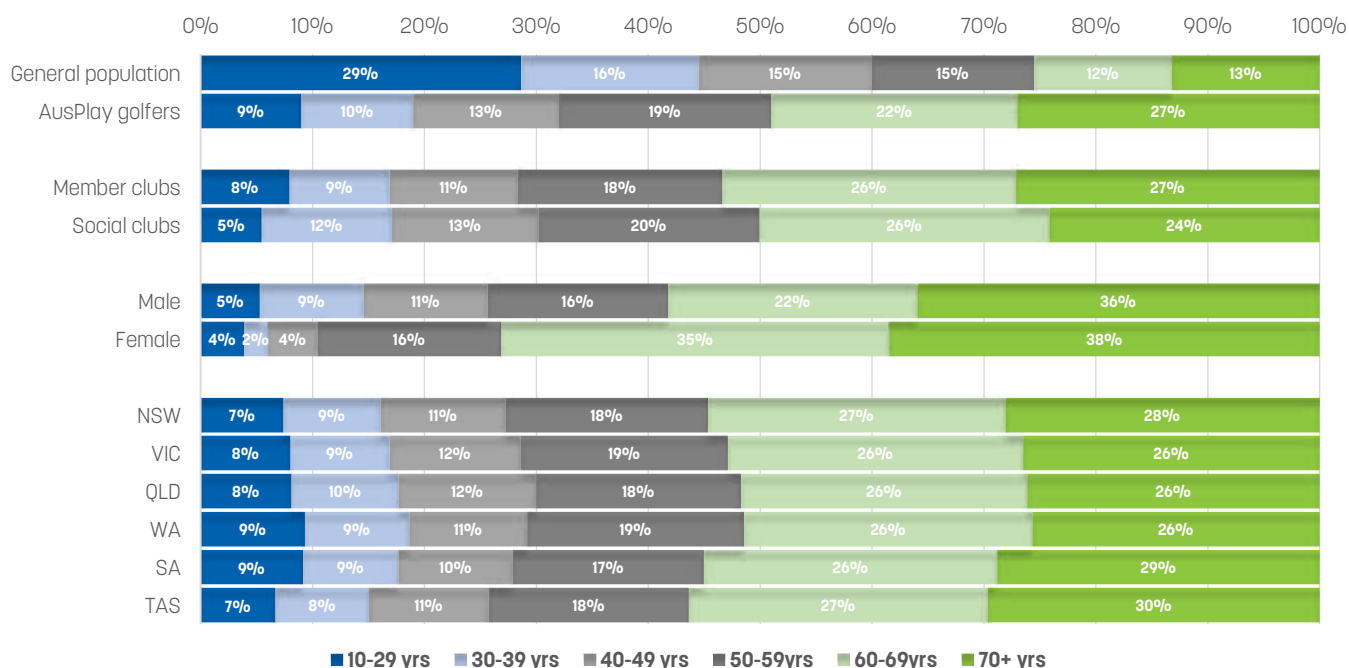
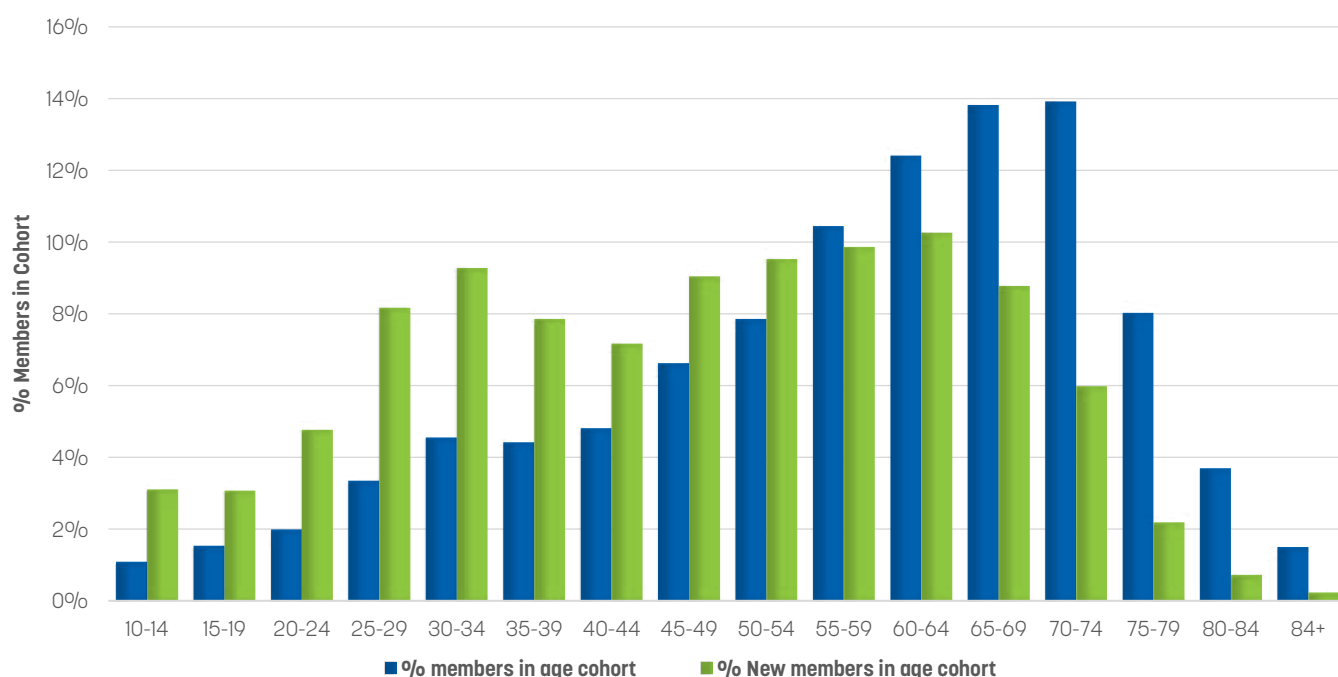


Chart 17: New member age profile compared to members generally

Source: GOLF Link



Competition Rounds



27.5

average number of rounds played annually
increased in 2019 from 26.9 rounds to 27.5 rounds per member

Total competition rounds

For the same club dataset there were 10.534 million competition rounds played in 2019. This represents a 2% increase over 2018. 5-year total competition rounds data is summarised in Table 27.

Average competition rounds per member

Given an increase in total rounds played (2%) and a reported decline in membership numbers (0.1%), average annual rounds played on a per member basis thus increased in 2019 from 26.9 rounds to 27.5 rounds. 5-year average rounds data from GOLF LINK in summarised in Table 28.

Table 27: Total competition rounds

State	2015	2016	2017	2018	2019	% Change	
						1 Year	5 Year
NSW	3,731,789	3,780,298	3,773,594	3,870,305	3,931,154	1.6%	1.0%
VIC	2,641,496	2,599,790	2,631,990	2,671,162	2,698,883	1.0%	0.4%
QLD	1,720,288	1,810,947	1,757,168	1,780,779	1,858,265	4.4%	1.6%
WA	948,412	946,437	952,443	958,179	984,852	2.8%	0.8%
SA	743,580	733,285	742,212	739,189	741,253	0.3%	-0.1%
TAS	272,036	256,225	269,623	266,894	277,310	3.9%	0.4%
NT	42,570	42,438	40,064	43,440	42,501	-2.2%	0.0%
Metropolitan	4,228,570	4,255,352	4,241,499	4,311,455	4,408,425	2.2%	0.8%
Regional	5,555,444	5,585,674	5,583,925	5,667,098	5,778,064	2.0%	0.8%
Social	316,157	328,394	341,670	351,395	347,729	-1.0%	1.9%
Overall	10,100,171	10,169,420	10,167,094	10,329,948	10,534,218	2.0%	0.8%

Source: Golf LINK, Golf Australia

Table 28: Average competition rounds per member

State	2015	2016	2017	2018	2019	% Change	
						1 Year	5 Year
NSW	24.9	25.7	26.0	27.0	27.7	2.4%	2.1%
VIC	24.1	23.6	24.3	25.2	25.5	1.4%	1.1%
QLD	26.4	28.4	27.5	29.0	29.9	3.4%	2.6%
WA	28.4	28.5	29.4	29.2	30.1	3.0%	1.2%
SA	28.8	27.4	26.8	26.7	25.3	-5.2%	-2.5%
TAS	25.4	23.9	26.1	26.1	27.8	6.8%	1.9%
NT	18.4	19.5	19.7	21.5	22.0	2.1%	3.6%
Metropolitan	27.5	27.9	28.1	28.9	29.8	3.1%	1.6%
Regional	25.0	25.4	25.7	26.7	27.3	2.2%	1.8%
Social	15.3	15.2	15.5	16.0	14.6	-9.0%	-0.9%
Overall	25.4	25.8	26.1	26.9	27.4	1.9%	1.5%

Source: Golf LINK, Golf Australia

Average competition rounds per member by age

(This analysis concerns member clubs only.)

Average competition round figures in Table 28 vary significantly when measured by age cohort. Chart 18 below represents this trend, where round frequency peaks for members aged between 70 to 79 at just over 40 rounds per member annually.

Younger members by contrast have a significantly lower round frequency, with most cohorts

under the age of 40 playing an average of less than 20 rounds per member.

Older cohorts also tend to be the most populous. The two age cohorts in the 65-74 age range for instance represent 28% of total members and have an average of 40 rounds per member. This is well above the national average of 27.5.

Chart 18: Average competition rounds by age cohort

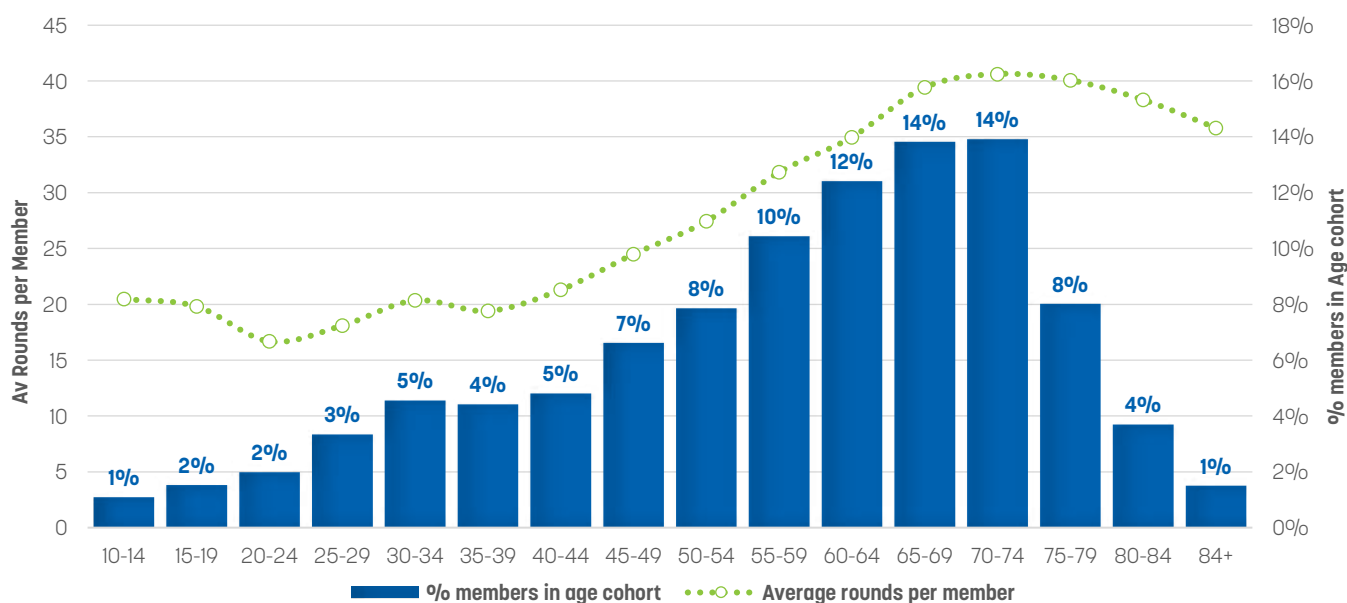
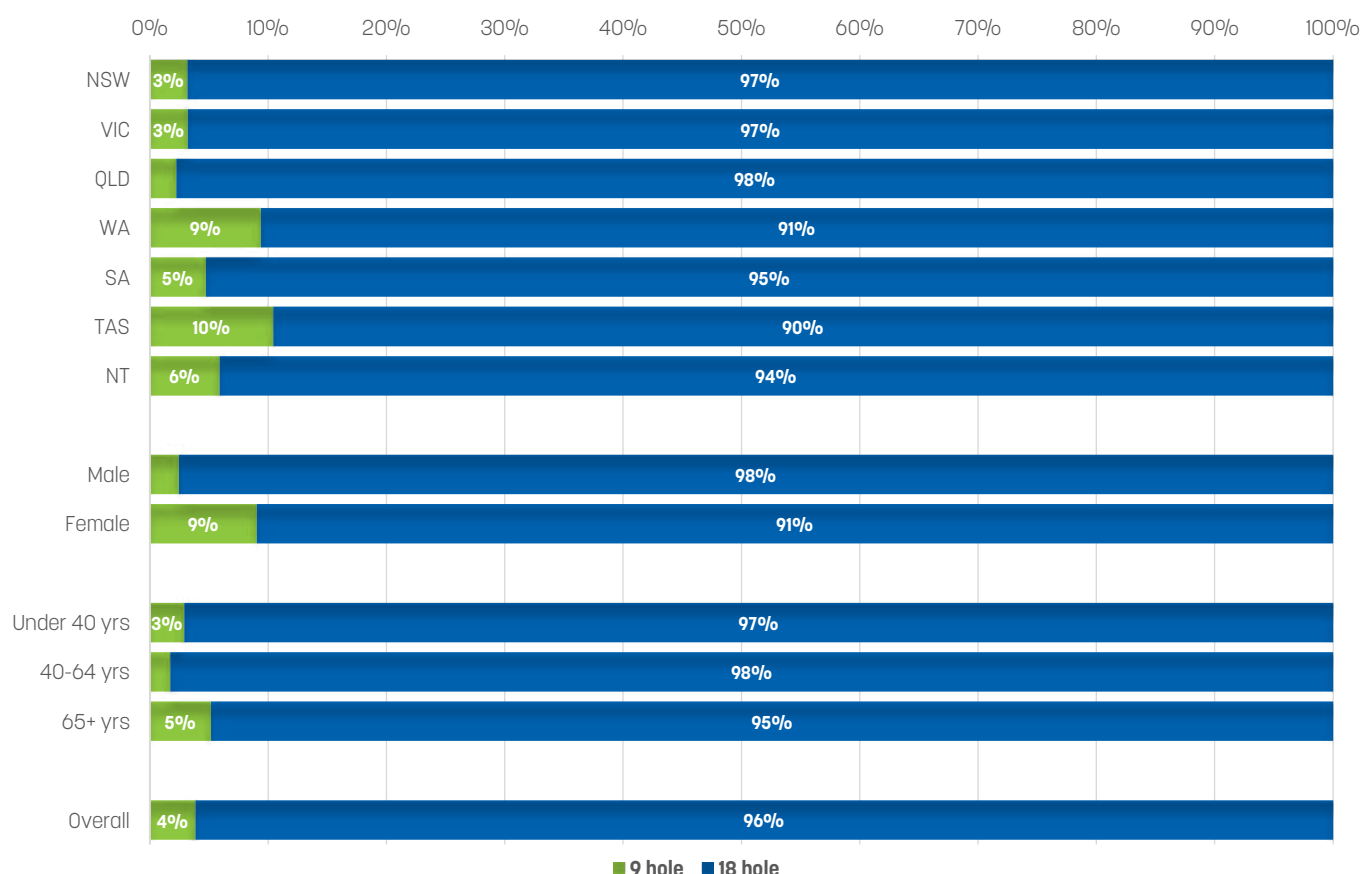


Chart 19: Proportion of 9 and 18-hole rounds 2019



9-hole competition rounds

Addressing the changing environment in which golf is operating in and following a global initiative by the R&A, the promotion of increased 9-hole rounds has been a focus of Golf Australia.

Changes to the handicapping system were instigated to allow for such rounds to be played and to be attributable to handicap movement. Key 2019 outcomes are represented in Chart 19.



Key Observations

Key outcomes for 2019 compared to 2018 are noted below:

- 838 clubs (64%) recorded 9-hole rounds in 2019, up by 6 clubs from 2018.
- A total of 392,114 9-hole rounds were played in 2019, an increase of 33% over 9-hole rounds played in 2018.
- In 2019 9-hole rounds accounted for 4% of total rounds played.
- Of those clubs playing 9-hole rounds (64% of clubs), 9-hole rounds accounted for 9% of total rounds played
- For those clubs recording 9-hole rounds in both 2018 & 2019, on a per member basis, average 9-hole rounds played increased from 1.4 to 1.9 per member
- The largest increases in 9-hole play were seen in WA (4% to 9%) and Tasmania (3% to 10%)
- The 65 yr + age cohort played the highest proportion of 9-hole rounds, reflecting 5% of overall rounds played. This grows to an average of 15% for members aged 80 years or older.



Par 3, 12th Hole / Mount Compass Golf Course, SA
Photo: Mount Compass Golf Course / David Brand

05 Annual Programs

Golf Australia delivers a number of annual industry development programs. Two of the major programs include the Community Instructor Program and the Disability Inclusion Program.

Results achieved within these programs are detailed in this chapter.



Community Instructor Program

The Community Instructor Program provides online training and accreditation, equipping golfers and non-golfers with the skills and knowledge to deliver Golf Australia's national participation programs in local golf clubs and schools primarily through voluntary means. These accredited Community Instructors play an integral role in attracting and introducing new people to golf and providing a pathway to increasing community involvement in the sport.

The program has seen progressive growth over the past four years since its launch in 2015. By the end of the 2018/19 year, there were 1,065 accredited Community Instructors, a growth of 259 accreditations on the previous year. Total accreditations are summarised in Table 29.

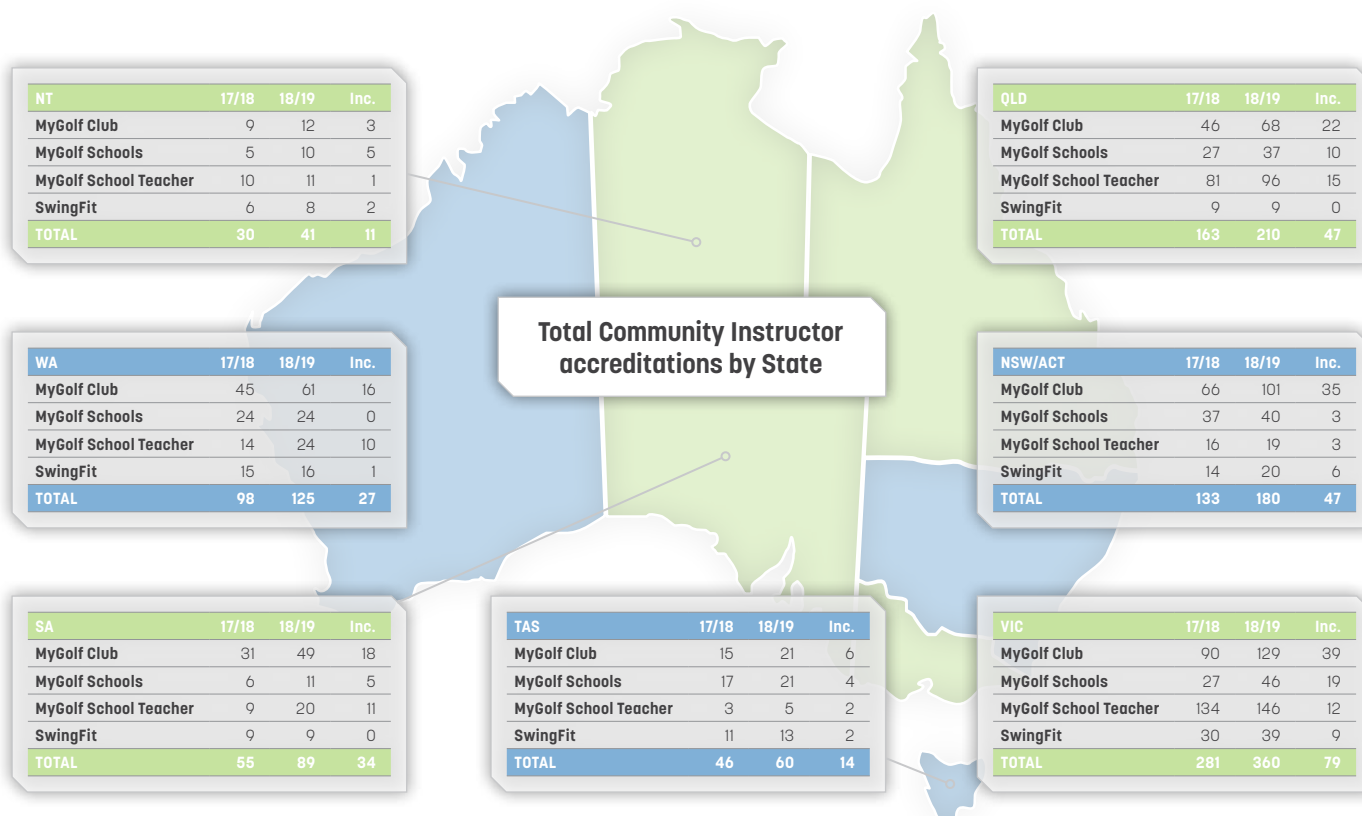
Whilst further recruitment of volunteers into the program remains

a key focus, strategies to actively engage the workforce already accredited, in the delivery of club and school-based programs were employed throughout the year. The specialised MyGolf Schools Teacher Accreditation was also strongly promoted to upskill teachers to deliver programs in their schools and create an all-important avenue of promotion and transition to MyGolf programs at local facilities.

Table 29: Total Community Instructor accreditations

Cohort	2017/18	2018/19	Increase
MyGolf Club	302	441	139
MyGolf Schools	143	189	46
MyGolf School Teacher	267	321	54
SwingFit	94	114	20
OVERALL	806	1,065	259

Source: Golf Australia



Disability Inclusion Program

Leadership and governance

2018/19 has seen significant growth globally in the development of pathways for people with disability to participate in the game of golf. Golf Australia through its collaboration with EDGA, the IGF and R&A have assisted in developing the World Rankings for Golfers with Disability through WAGR. Since January 2019, ranking events for golfers with disability have more than doubled to an annual calendar of 40+ events, twelve of these events being held in Australia, making Golf Australia the most active federation in the world for events for golfers with a disability.

The Australian All Abilities Championship

The Australian All Abilities Championship held within the Emirates Australian Open attracted the attention of the golfing world. The leading 12 players with a disability played the 54-hole championship within the field of the Australian Open. An overwhelming success, the inaugural AAAC was won by Sweden's Johan Kammerstad which included a final round 73, a performance not matched by seasoned PGA Tour Members. The format has inspired other tours around the world with the European Tour and PGA Tour mirroring Golf Australia's format.

In addition to the Australian All Abilities Championship, the ISPS Handa Disabled Golf Cup was played within the ISPS Handa World Cup of Golf, the first teams' competition of its kind for people with disability during a PGA Tour event.

Table 30: Disability participants

State / Cohort	2018/19
NSW	2,975
VIC	3,957
QLD	2,398
WA	953
SA	187
TAS	159
NT	-
OVERALL	10,629

Source: Golf Australia

Education and workforce development

The PGA All Abilities Coach program in partnership with the PGA of Australia delivered its 100th PGA All Abilities Coach to the program during the 2018/19 year. The further development of the PGA All Abilities Coach program has also seen the opportunity for these coaches to engage in the National Disability Insurance Scheme (NDIS), integrate people with disability into existing club and program offerings and be the driving force behind growing participation for people with disability in the game across all levels. PGA All Abilities Coaches are continuing to build strong partnerships with local organisations, opening facilities to a wider proportion of their communities.

Participation

Total participants in these programs continued to show an upward trajectory in 2019. Inclusive of other disability organisations, total participant numbers increased to 10,629. Programs delivered by Golf Australia grew by 24%, increasing from 3,743 in 2018 to 4,623 in 2019.



Emirates
Australian Open

1

PAR 4 365M
 399Y

sydney.com



Artwork & design by
Brand Media & Consulting
www.brand-media.com.au

Level 2, 111 Coventry St
South Melbourne
VIC 3205 Australia

03 9626 5050

info@golf.org.au
www.golf.org.au



GolfAustralia

© 2020 Golf Australia - All Rights Reserved.