



2023/24 Golf Participation Report

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Jeff Blunden
Managing Director



Kymberley Patterson
Finance Consultant

ABOUT THE AUTHORS

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.

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Total Competition Rounds	39
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Average Competition Rounds per Member	39
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Average Competition Rounds per Member by Age	40
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01

Foreword



James Sutherland

Chief Executive Officer
Golf Australia

Australian golf is celebrating a remarkable fifth year of participation growth, with 19 percent of adult Australians hitting a golf ball in 2023-24.

A staggering 3.8 million Australians played golf in the last year – at golf courses, driving ranges, simulators or minigolf facilities, a 9% increase year on year.

Golf club membership grew by 5.6 percent in 2023-24 to 459,143 people, capping off a total of 19% growth the last five years.

The growth in junior membership was probably the specific highlight, sky-rocketing through a 33.4% increase from last year, made up of a 37.3% increase in boys and 13.8% increase in girls.

Women and girls membership continues to grow, seeing an increase of 3.2% and validating the work done through various specialised programs, including the R&A Women in Golf Charter and the Junior Girls Scholarship Program.

One of golf's great strengths as a sport is the different ways people can play the game – and there is no doubt off-course golf continues to fuel on-course activity and growth. Over 1.5 million adult Australians played golf at an off-course facility in 2023-24.

Both our MyGolf program for kids and Get Into Golf program for adults new to the game have enjoyed double digit growth. Customer feedback from these programs is incredibly positive – and credit should go to the highly skilled network of PGA Members across the country who provide fun and engaging learning experiences for beginner golfers.

MyGolf had an 11% year-on-year increase in participation and Get Into Golf has grown by 21%. We continue to encourage clubs, facilities and PGA professionals to focus strongly on introductory programs as it is clear that these quality experiences are highly valued and stimulate a desire for beginners to play more golf and progress along their own golfer journey.

The Junior Girls Scholarship Program continues to thrive and provides a bridging program for girls to progress in the game. With the support of the Australian Golf Foundation, the program has grown significantly over

the past four years. We are anticipating over 1,100 scholars in 2025 and are excited about the way this program is increasing girls' participation, creating friendship groups and providing great experiences that help girls love the game.

The recently released Community Benefits of Golf in Australia report demonstrates the enormous impact that our strong and growing participation base provides to our national economy. The report notes that golf accounts for \$10.3b of expenditure per year, generating more than \$3 billion in community benefits and highlighted by \$860m of physical and mental health benefits golf contributes each year. All our leading indicators suggest that golf is enjoying a period of unprecedented growth.

Golf in Australia is big, and it is getting bigger – and these are exciting times for our sport.

The Strategy for Australian Golf (2022-2025) is playing an integral role in supporting the industry and stimulating the growth our sport currently enjoys.

Together with our leading industry partners, PGA of Australia, the WPGA Tour of Australasia and others, we strongly believe there is good reason to be optimistic about golf's future.

Growth does not come without its own challenges and large increases in demand and activity cannot happen without a huge effort from across the industry.

The growth is a credit to everyone that works across the industry, including PGA Professionals, club and facility staff, greenskeepers, volunteer boards, retail employees, and others across Australian golf.

People who work in golf are passionate about their customers and improving their golfer experiences. More than ever before, golf is a fun sport for all Australians – and we are delighted to see the way that people from all ages, backgrounds and abilities are being welcomed into our sport.

We thank everyone across the golf industry for their wonderful contribution to golf in Australia over the last 12 months.

02

Key Findings

CLUB MEMBERSHIP

(incl. Social Clubs)

METROPOLITAN
2.9% Growth
168,867
 Club Members
 203 Clubs

REGIONAL
5.0% Growth
250,922
 Club Members
 1,082 Clubs

SOCIAL
23.8% Growth
39,354
 Club Members

459,143
24,412 New Members
5.6% Increase from FY23

SEGMENT PARTICIPATION

KAP Research & Deakin University

459,143
 Golf club members
 played a round of golf
 (on-course only)

1,840,857
 Played a round
 of golf

690,000
 Use outdoor
 hitting facilities

175,000
 Use indoor
 hitting facilities

640,000
 Played
 mini golf

GOLF TOTAL PARTICIPATION

KAP Research & Deakin University

1.3m
 ON-COURSE
 ONLY

Avg. age **45**
30% women
83%
 Australian born

1.0m
 BOTH
 ON/OFF

Avg. age **41**
38% women
79%
 Australian born

1.5m
 OFF-COURSE
 ONLY

Avg. age **38**
51% women
73%
 Australian born

GROWTH IN PARTICIPATION PROGRAMS

**COMMUNITY
 INSTRUCTOR
 ACCREDITATIONS**
5.3%
1,471
 Participants

**DISABILITY
 INCLUSION
 PROGRAM**
6.7%
4,167
 Participants

GROWTH IN PARTICIPATION PROGRAMS

MyGOLF
10.7%
36,643
 Participants

GET INTO GOLF
21.2%
18,302
 Participants

AUSTRALIAN GOLF FOUNDATION | **Junior Girls Scholarship Program**
22.7%
1,191
 Participants

MEMBERSHIP GROWTH

by state since FY23
 (excl. Social Clubs)

3.7%
 NSW
167,442

2.9%
 VIC
106,697

6.2%
 QLD
73,553

4.8%
 SA
27,314

5.6%
 WA
30,025

6.1%
 TAS
12,766

0.4%
 NT
1,992

03

Report Background

INTRODUCTION

Golf Australia continues to provide the golf industry with information that enables an understanding of the current landscape and trends with regards to golf participation.

This is the 11th edition of the National Club Participation Report, a key component in Golf Australia's industry education and communication strategy.

This report examines the overall health of the game from a participation perspective and remains an invaluable reference as clubs and other industry stakeholders seek to understand current trends.

With knowledge of these trends, evidenced-based strategies can be developed that seek to enhance demand and increase the game's long-term popularity.



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Golf Participation

GOLF AUSTRALIA NATIONAL REPRESENTATIVE RESEARCH

During 2024 Golf Australia conducted research supported by Adam Karg of KAP Research and Deakin University to measure demand in all forms of golf participation. This research details the ways in which golf is being played and the behaviours and characteristics that are evident within golf's participation base.

Consistent with 2023, this research has found that off-course participation numbers now exceed those participating on-course. A higher percentage of women and younger people are participating via this channel.

In terms of venues utilised, the KAP Research shows that golfers can be split into three types: those who play only on-course; those who play only off-course; and those who play both.

Chart 1 illustrates the participation mix and key demographic traits.

Chart 2 illustrates the current golf participation mix.

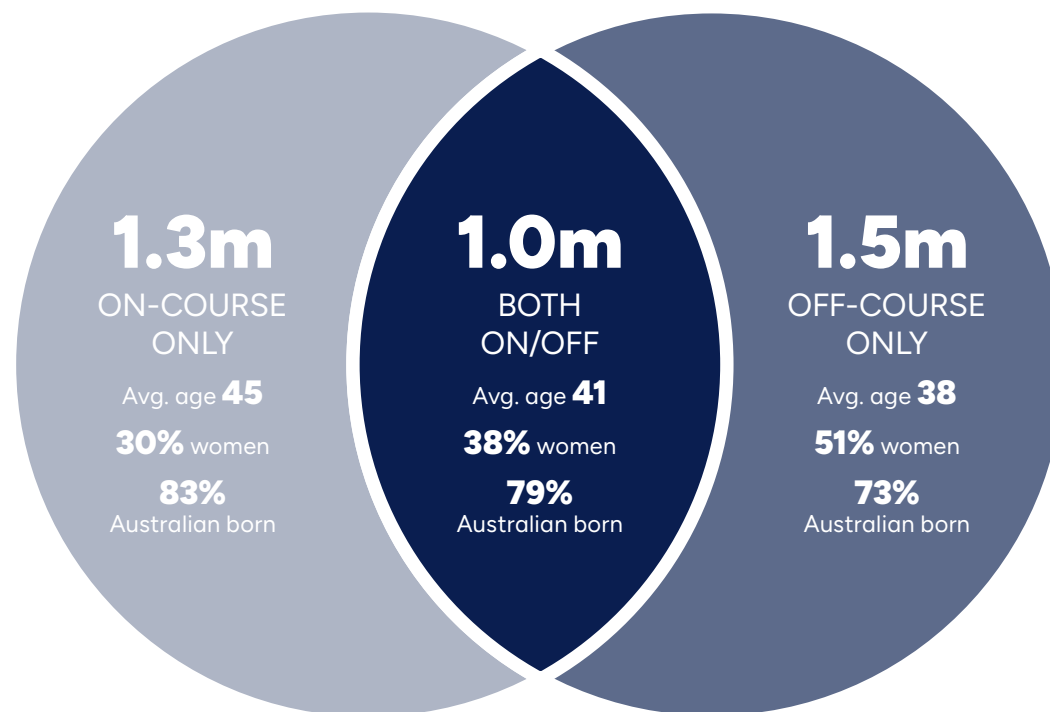


Chart 1: Participation mix and key demographic traits

Source: KAP Research/Deakin University Golf Participation Study

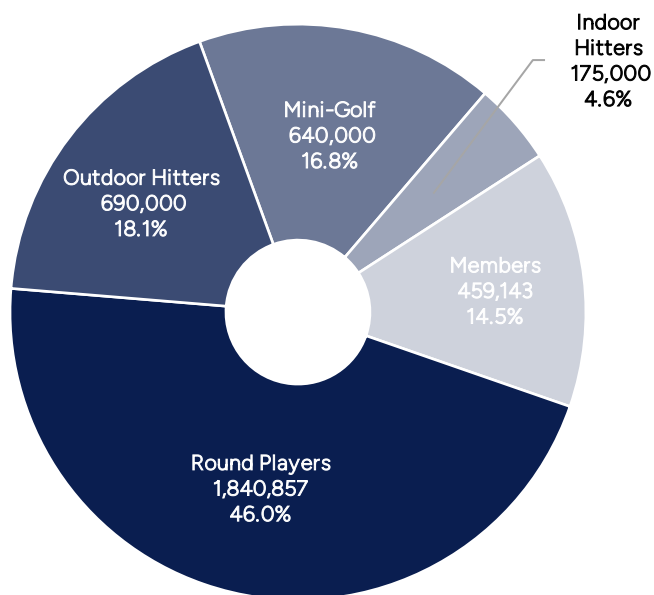


Chart 2: Current golf participation mix

Source: KAP Research/Deakin University Golf Participation Study
NB: Participants are counted only once in their most advanced category of participation

DEFINITIONS

On-course only

Members

A golf club member

Round Players

Not a club member, played a 9-18 hole round of golf (incl. short courses)

Both on/off course

Outdoor Hitters

An on-course golfer, but also played at a driving range or outdoor practice/entertainment centre

Off-course only

Indoor Hitters

No on-course golf, no outdoor practice, but played at a simulation or indoor training centre

Mini Golf (only)

Only played mini golf

AUSPLAY GOLF PARTICIPATION DATA

Results from the latest (2023-24) AusPlay National Participation Survey have recently been released by the Australian Sports Commission.

We will continue to report these figures in comparison to previous years as though there has been no change in methodology, and update the reader each year with further information.

Table 1: Annual golf participation and participation rates by gender

Year	Participation			Participation Rate		
	Male	Female	Total	Male	Female	Total
2016	836,600	185,500	1,022,100	8.6%	1.9%	5.2%
2016-17	817,110	185,610	1,002,720	8.3%	1.8%	5.0%
2017	785,339	193,287	978,626	7.9%	1.9%	4.9%
2017-18	768,743	177,196	945,939	7.7%	1.7%	4.7%
2018	753,742	202,174	955,916	7.5%	2.0%	4.7%
2018-19	708,811	208,063	916,874	6.8%	2.0%	4.4%
2019	695,012	182,901	877,913	6.8%	1.7%	4.2%
2019-20	785,565	209,849	995,414	7.7%	2.0%	4.8%
2020	890,656	239,887	1,130,543	8.6%	2.2%	5.4%
2020-21	974,343	229,738	1,204,081	9.3%	2.1%	5.7%
2021	996,293	232,245	1,228,538	9.4%	2.1%	5.7%
2021-22	990,563	235,424	1,225,987	9.3%	2.1%	5.7%
2022	1,057,002	256,625	1,313,627	9.9%	2.3%	6.0%
2022-23	1,019,961	259,503	1,279,464	9.4%	2.3%	5.8%
2023-24	763,527	190,762	954,289	7.1%	1.7%	4.4%

Source: AusPlay

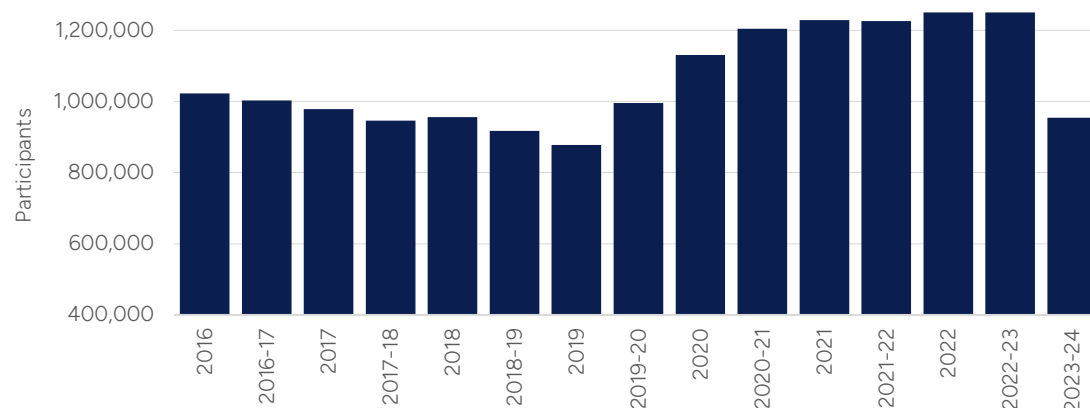


Chart 3: Annual golf participants

Source: AusPlay



A STATEMENT ON GA NATREP VS AUSPLAY MEASUREMENT

The Golf Australia Nationally Representative Survey Project is designed to report on a wide range of golfing activities inclusive of traditional forms of play (i.e. on course golf) as well as alternate formats for golf that have growing popularity. This approach provides Golf Australia (and other users of the research across the golf industry) with the broadest understanding of participation, journeys and experiences of those engaging in forms of the sport, and best aligns with Golf Australia's strategic planning and reporting processes.

In comparing results to AUSPLAY, a nationally representative survey reporting on sport participation behaviours across Australia, we note the following two key observations.

- 1) **GA has a wider conceptualisation of the sport of golf, while AusPlay focusses primarily on traditional, structured participation formats.**

While the GA project design takes a wide view and conceptualisation of golf participation, AusPlay retains a focus on traditional, structured forms of sport consumption – in the sport of golf, this limits the ability to fully capture growing participation in 'off-course' activities and engagement in the sport. This change is reflective of changes to sport consumption globally, with sports commonly adjusting their planning and reporting to align with shifts to alternate and modified sport options. Overall, we acknowledge a setting for very different overall participation numbers between the GA and AusPlay studies based on different conceptualisations of participation across the sport of golf.

- 2) **Recent changes move to AusPlay methodically limit the ability to compare sport participation results over time.**

Significant changes were made to the AusPlay methodology and data collection processes over 2024. While these provide for a larger sample size and reduce some biases within existing (phone based) methodologies, these changes (per the 'AusPlay Survey advancements: Detailed information about the changes' document, released October 2024) have resulted in differences in results in areas including behaviours (e.g. participation) and attitudes (e.g. motivations) compared to the prior method. As such, the changes made to AusPlay are disruptive to the ongoing ability to compare results to those obtained in the prior methodology. While again the overall changes to the method are viewed as positive for the sample and design, it is expected to take some time to recalibrate the measurement of traditional, structured participation of sport participation that this survey provides.

Professor Adam Karg
Director, Sport Innovation and Technology Lab, Deakin University
Director, KAP Research

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Annual Programs

Golf Australia delivers a number of national entry level programs for kids and adults. Annual results for these programs are detailed following.



MYGOLF PROGRAM

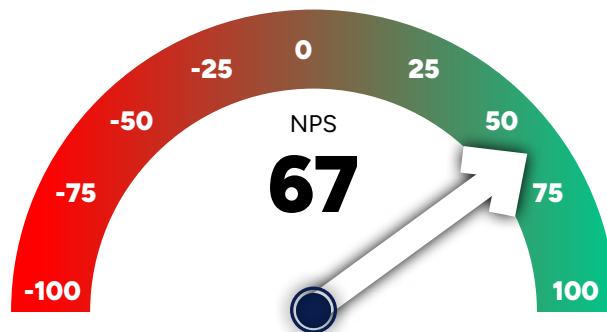
MyGolf, Australia's national junior introductory program for children aged 5 to 12, is the primary driver of junior golf participation and highlights the vital role of PGA Professionals.

In 2023/24, PGA Professionals independently delivered 3,552 programs, while community instructors conducted 637, with both groups collaborating on 219 programs. Overall, PGA Professionals were involved in 85% of all programs delivered, underscoring their critical contribution to the program's success and its mission to grow junior participation in golf.

In 2023/24, the program achieved a 10.7% increase in participation, supported by a 9.8% rise in active centres. Notable participation growth occurred in New South Wales and South Australia, with 37 new centers established across New South Wales and Queensland.



NET PROMOTER SCORE



Considering your complete experience with MyGolf, how likely would you be to recommend the program for children of a friend or family member?

Table 2: MyGolf participants

	2022/23			2023/24			% Total Change
	Boys	Girls	Total	Boys	Girls	Total	
NSW	2,199	905	3,104	3,074	1,204	4,278	37.8%
NT	446	269	715	552	244	796	11.3%
QLD	8,043	3,976	12,019	8,799	3,963	12,762	6.2%
SA	1,778	682	2,460	2,066	927	2,993	21.7%
TAS	968	508	1,476	884	634	1,518	2.8%
VIC	7,943	2,996	10,939	8,755	3,285	12,040	10.1%
WA	1,523	854	2,377	1,521	735	2,256	-5.1%
Total	22,900	10,190	33,090	25,651	10,992	36,643	10.7%

Table 3: MyGolf programs

	PGA Pro Only Run Programs	Community Instructor Only Run Programs	Combined PGA & Community Instructor Run Programs	Total Programs
NSW	573	38	33	644
NT	13	28	6	47
QLD	1,136	79	85	1,300
SA	252	50	29	331
TAS	140	38	1	179
VIC	1,181	368	35	1,584
WA	257	36	30	323
Overall	3,552	637	219	4,408

Table 4: MyGolf centres

	2022/23	2023/24	% change
NSW	69	86	24.6%
NT	8	10	25.0%
QLD	86	106	23.3%
SA	47	43	-8.5%
TAS	24	25	4.2%
VIC	151	155	2.6%
WA	44	46	4.5%
Overall	429	471	9.8%



GET INTO GOLF

Get Into Golf's ambition is simple - to connect interested participants with their local golf program and help bring new people into our sport and facilities.

Growth in all key metrics was achieved in 2023/24 including:

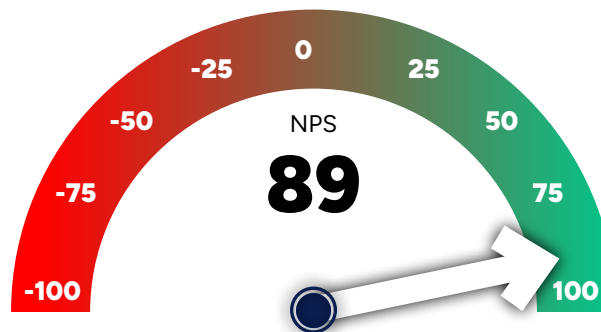
- › a 21.2% increase in total participants;
- › a 24.8% increase in total female participants;
- › a 14.3% increase in active centres;
- › a 24.2% increase in total programs delivered.

PGA Professionals independently delivered 2,301 programs, while community instructors conducted 447, with both groups collaborating on 105 programs. Overall, PGA Professionals were involved in 84% of all programs delivered, highlighting their crucial role in the program's success and its mission to engage new participants into our sport and facilities.

High engagement from women continues to be seen - 86.8% of total participants for the year being female.

23.9% of program participants were identified as being born overseas, as we begin a concerted effort to expand our sport and its reach into all community groups.

NET PROMOTER SCORE



Considering your complete experience with Get Into Golf, how likely would you be to recommend the program to a friend or family member?

Table 5: Get Into Golf participants

	Total Participants				Women Participants	
	2021/22	2022/23	2023/24	% change	2023/24	% Women
NSW	603	1,058	1,633	54.3%	1,561	95.6%
NT	204	358	388	8.4%	351	90.5%
QLD	3,955	5,482	5,934	8.2%	5,487	92.5%
SA	692	716	1,139	59.1%	976	85.7%
TAS	853	827	838	1.3%	678	80.9%
VIC	3,984	6,021	7,020	16.6%	5,795	82.5%
WA	592	635	1,350	112.6%	1,042	77.2%
Total	10,883	15,097	18,302	21.2%	15,890	86.8%

Table 6: Get Into Golf programs and centres

	PGA Pro Only Run Programs	Community Instructor Only Run Programs	Combined PGA & Community Instructor Run Programs	Total Programs	Active Centres	Registered Centres
NSW	272	41	4	317	53	121
NT	9	16	2	27	9	13
QLD	693	24	21	738	65	151
SA	166	17	4	187	34	64
TAS	164	20	1	185	22	42
VIC	885	305	33	1,223	127	236
WA	112	24	40	176	33	58
Total	2,301	447	105	2,853	343	685

GET INTO GOLF

TEEMATES

The first full year of the TeeMates program has seen strong growth nationally, with 1,391 new members recruited during the year.

74 events with 3,369 participants were also conducted, and 1,010 Youth On Course rounds recorded across our 42 partner venues.

TEEMATES
GOLF MORE

youth
on
course



AGF JUNIOR GIRLS SCHOLARSHIP PROGRAM

The AGF Junior Girls Scholarship Program has grown strongly since its launch in 2021, with an increase from 971 girls in 2023 to 1,191 girls in 2024.

Further, in 2024 the AGF Junior Girls Scholarship Program Alumni Program was launched, with the intent to continue to engage with scholarship holders beyond the term of their scholarship, and build out events across the country for Alumni to take part in.

Table 7: Junior Girls scholarships

	Total Participants			Total Clubs		
	2022/23	2023/24	% change	2022/23	2023/24	% change
NSW	189	263	39.2%	28	32	14.3%
NT	19	25	31.6%	3	3	0.0%
QLD	181	214	18.2%	28	27	-3.6%
SA	107	135	26.2%	15	16	6.7%
TAS	62	74	19.4%	9	9	0.0%
VIC	312	362	16.0%	43	50	16.3%
WA	101	118	16.8%	16	16	0.0%
Total	971	1,191	22.7%	142	153	7.7%



22.7%

INCREASE IN
JUNIOR GIRLS
SCHOLARSHIPS



COMMUNITY INSTRUCTOR PROGRAM

The Community Instructor Program aims to increase capacity through predominantly a volunteer workforce to deliver MyGolf, Schools and Get Into Golf programs.

Community Instructors complete an online training and accreditation course, with this being supported by practical training offerings delivered by PGA Professionals, to further build their confidence in delivery of these national programs.

There are currently three online course offerings – the general Community Instructor accreditation enabling the delivery of all national participation programs, the All Abilities course as an addition to that enables the delivery of MyGolf and Get Into Golf All Abilities programs by those with experience working with special needs, and the MyGolf Teacher accreditation customised for teacher delivery of MyGolf in Schools.

FY 2023/24 has seen a further 5.3% increase in the number of active Community Instructors involved in the delivery of programs, either supporting their local PGA Professional, or in regional areas without PGA Professionals, providing a fun and games-based entry point to the game for beginners that would not otherwise be available.

The Community Instructor Program is an area enjoying significant engagement from women, with 38% of accreditation completions being female. By year end a 5.9% increase in total accreditations was achieved, with a 15.3% increase in school-led instructors.

Table 8: Community Instructor Program accreditations

	2019/20	2020/21	2021/22	2022/23	2023/24	1 Year
Community Instructor	646	1,027	1,316	1,397	1,471	5.3%
MyGolf School Teacher	236	271	303	222	256	15.3%
Practical Training				34	31	-8.8%
All Abilities*		50	128	118	118	0.0%
Total	882	1,348	1,747	1,771	1,876	5.9%

Table 9: Community Instructor Program accreditations by state

	Community Instructor	MyGolf School Teacher	All Abilities	Total
NSW	316	50	23	389
NT	46	2	3	51
QLD	262	35	34	331
SA	160	30	7	197
TAS	60	13	9	82
VIC	500	90	34	624
WA	127	36	9	172
Overall	1,471	256	119	1,846

5.9%

INCREASE IN TOTAL ACCREDITATIONS



PGA PROFESSIONALS AND PROGRAM DELIVERY

Nationally, there are 2,227 PGA Professionals and 305 Membership Pathway Program members (Trainees) that are available to deliver MyGolf, Schools & Get Into Golf programs.

In 2023/24, there were 6,073 programs delivered by PGA Professionals & PGA Associates, with 324 programs co-delivered by PGA Members and Community Instructors.

Table 10: 2023/24 PGA Professionals and program delivery

	MyGolf	Schools	Get Into Golf	Total
PGA Delivered				
Number of programs	3,552	220	2,301	6,073
% of programs	81.0%	42.0%	81.0%	78.4%
PGA co-delivered with Community Instructor				
Number of programs	219	-	105	324
% of programs	5.0%	-	3.0%	4.1%

DISABILITY INCLUSION PROGRAM

Golf Australia remains committed in becoming a sport of choice for people living with a disability in Australia.

Through Golf Australia's entry level programs MyGolf and Get Into Golf, 66% of registrations of people who identified as living with disability participated in mainstream program offerings. This number highlights the inclusive design of the sport and the flexibility of both MyGolf and Get Into Golf offerings to cater for Australians with all levels of ability.

Strategically, Golf Australia will continue to engage Australians living with disability into golf through MyGolf, Get Into Golf and our network of PGA All Abilities Coaches and Community Instructors.

The Community Instructor – All Abilities Module, assisting in providing further capacity for volunteers to get involved in the delivery of MyGolf All Abilities and Get Into Golf All Abilities programs has now accredited a further 280 volunteers from the disability sector enrolled and or completed the module designed for deliverers offering MyGolf or Get Into Golf All Abilities Programs.

In an extension of the All Abilities pathway, Golf Australia now runs more World Ranking Events for Golfers with a Disability than any other national federation across the world. New state championships have been run in Tasmania and South Australia with additional events also taking place in New South Wales and Western Australia to take the number of World Ranking events to 12.

By year end, a 6.7% increase in total participants had been recorded with 74 programs offered across the year.

Table 11: Disability Inclusion Program

	Total All Abilities Participants			All Abilities Programs
	2022/23	2023/24	% change	
NSW	39	95	143.6%	1
NT	42	94	123.8%	-
QLD	1,008	819	-18.8%	10
SA	357	455	27.5%	4
TAS	471	481	2.1%	4
VIC	1,848	1,955	5.8%	33
WA	140	268	91.4%	22
Total	3,905	4,167	6.7%	74



06

Club Membership

STATE GOLF ASSOCIATION REPORTING

Club golfer numbers are reported annually by the seven state and territory golf association bodies, five of which are operated by Golf Australia. Reported numbers reflect 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 multiple times.

The respective reporting periods they represent are summarised in Table 12.

Table 12: State reporting periods

State	Data Collected
NSW (Includes ACT)	June 2024
VIC	December 2023
QLD	December 2023
SA	December 2023
WA	December 2023
TAS	June 2024
NT	September 2023

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 body
Social Clubs	Registered clubs without full affiliation, which typically play in allotted tee times at public courses but may also be 'virtual' in nature, that is, creating handicaps for their members to play in any event at any course
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



PLAYING MEMBERS: OVERALL RESULTS

Members by state

National membership numbers across Australia for the year 2023/24 are reported as 459,143. This result represents a net 5.6% increase (24,412 members) from 2022/23.

This marks the fourth consecutive year of growth, following the record outcomes of 2022/23, and the first time since 1994 that annual growth has been sustained for four consecutive years.

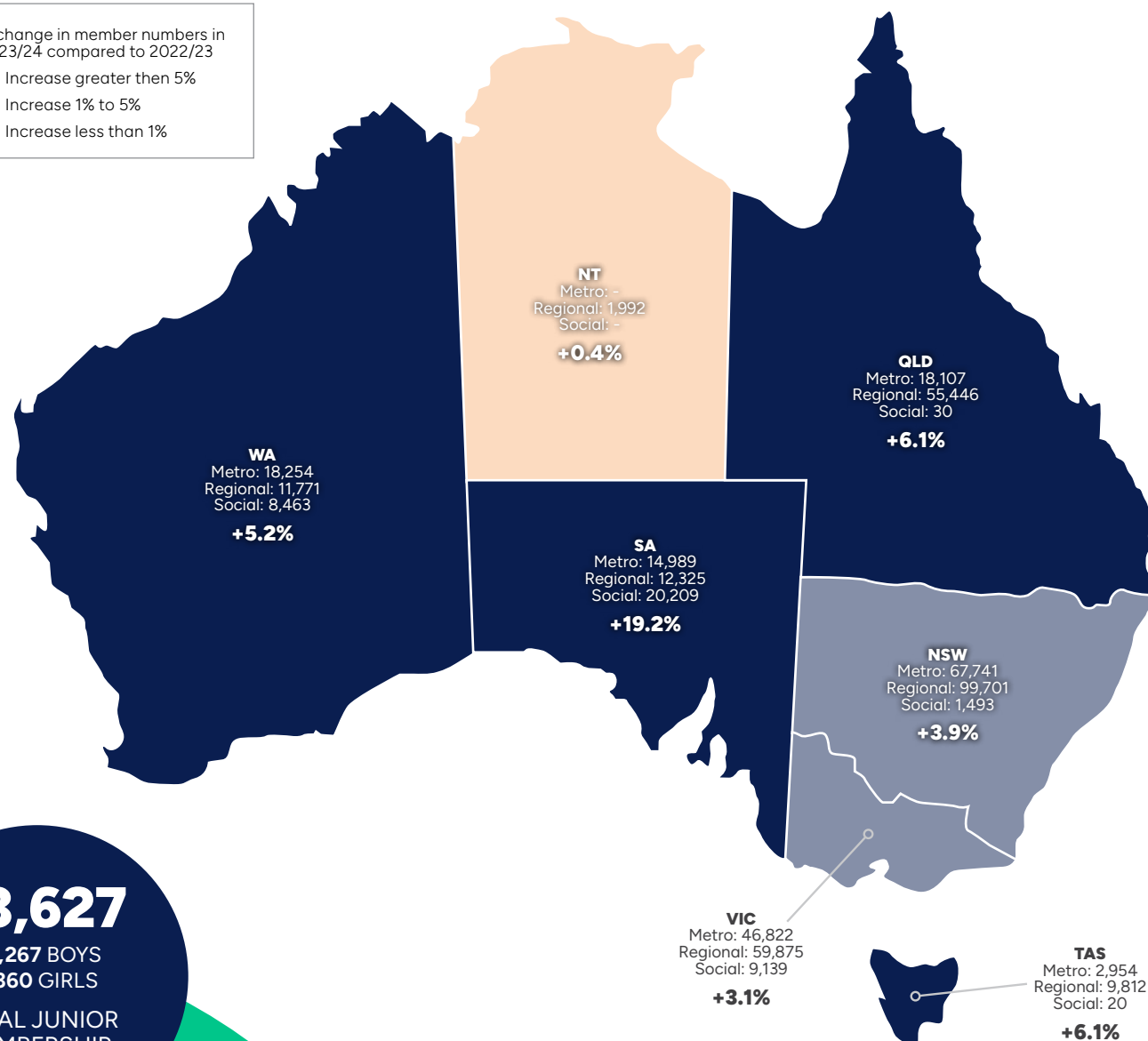
Membership growth was evident across all markets and segments. Member clubs saw a 4.2% rise, while social clubs experienced a notable 23.8% increase.

Growth by gender showed increases of 4.8% for men and 2.8% for women.

Junior membership surged significantly, up by 33.4% from the previous year.

% change in member numbers in 2023/24 compared to 2022/23

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



459,143

TOTAL
MEMBERSHIP
NUMBERS

5.6%

INCREASE IN
MEMBERSHIP
NUMBERS

23,627

20,267 BOYS
3,360 GIRLS

TOTAL JUNIOR
MEMBERSHIP
NUMBERS

23.8%

INCREASE IN
SOCIAL CLUB
MEMBERS

Table 13: 2023/24 playing members by key cohort

	NSW	VIC	QLD	WA	SA	TAS	NT	Overall	% change over 2022/23
Metropolitan	67,741	46,822	18,107	18,254	14,989	2,954	0	168,867	2.9%
Regional	99,701	59,875	55,446	11,771	12,325	9,812	1,992	250,922	5.0%
Social	1,493	9,139	30	8,463	20,209	20	0	39,354	23.8%
	168,935	115,836	73,583	38,488	47,523	12,786	1,992	459,143	5.6%
Men	130,376	87,208	57,581	30,186	38,875	10,055	1,597	355,878	4.8%
Women	29,134	22,502	12,210	6,934	6,628	1,911	319	79,638	2.8%
Adult Total	159,510	109,710	69,791	37,120	45,503	11,966	1,916	435,516	4.4%
Boys	8,284	5,369	2,982	1,069	1,765	736	62	20,267	37.3%
Girls	1,141	757	810	299	255	84	14	3,360	13.8%
Junior Total	9,425	6,126	3,792	1,368	2,020	820	76	23,627	33.4%
Total Men/Boys	138,660	92,577	60,563	31,255	40,640	10,791	1,659	376,145	6.2%
Total Women/Girls	30,275	23,259	13,020	7,233	6,883	1,995	333	82,998	3.2%
Total	168,935	115,836	73,583	38,488	47,523	12,786	1,992	459,143	5.6%
% change over 2022/23	3.9%	3.1%	6.1%	5.2%	19.2%	6.1%	0.4%	5.6%	

Source: Golf Australia & member golf associations

Table 14: Australia year-by-year trend by cohort

	2017	2018	2019	2020	2021	2022/23	2023/24	% Change
Metropolitan	148,680	147,334	147,698	158,119	161,601	164,034	168,867	2.9%
Regional	212,037	210,718	211,631	229,802	235,294	238,905	250,922	5.0%
Total Member Clubs	360,717	358,052	359,329	387,921	396,895	402,939	419,789	4.2%
Social	21,111	22,485	25,284	27,435	29,885	31,792	39,354	23.8%
Total Members	381,828	380,537	384,613	415,356	426,780	434,731	459,143	5.6%
BY GENDER								
Men	294,310	294,130	298,687	325,659	333,478	339,560	355,878	4.8%
Women	74,907	73,234	72,682	74,117	77,042	77,456	79,638	2.8%
Boys	10,449	10,859	10,951	13,073	13,497	14,762	20,267	37.3%
Girls	2,162	2,314	2,293	2,507	2,763	2,953	3,360	13.8%
Total	381,828	380,537	384,613	415,356	426,780	434,731	459,143	5.6%
BY AGE								
Total Adults	369,217	367,364	371,369	399,776	410,520	417,016	435,516	4.4%
Total Juniors	12,611	13,173	13,244	15,580	16,260	17,715	23,627	33.4%
Total Men/Boys	304,759	304,989	309,638	338,732	346,975	354,322	376,145	6.2%
Total Women/Girls	77,069	75,548	74,975	76,624	79,805	80,409	82,998	3.2%
Total	381,828	380,537	384,613	415,356	426,780	434,731	459,143	5.6%

Source: Golf Australia & member golf associations



PROFILE OF AUSTRALIAN CLUBS

Overall facilities

1,285 member clubs reported membership numbers for 2023/24. Key observations noted from the size profile data outlined in Table 15 includes:

- › 75.3% are classified as small clubs, having less than 500 members;
- › 84.2% (1,082) are in a regional area, with 71.2% of those clubs being classified as small clubs;
- › 15.8% are located in a metropolitan area, only 5.4% (69) of the total being classified as large clubs (i.e. over 1,000 members).

Table 15: Club size profile by geographic area

	NSW	VIC	QLD	WA	SA	TAS	NT	Total	% of Segment	% of Total
METROPOLITAN										
Small	25	9	3	6	9	0	0	52	25.6%	4.0%
Medium	36	20	5	11	6	4	0	82	40.4%	6.4%
Large	25	22	9	7	6	0	0	69	34.0%	5.4%
Total Metropolitan	86	51	17	24	21	4	0	203	100.0%	15.8%
REGIONAL										
Small	211	217	160	144	117	56	10	915	84.6%	71.2%
Medium	48	31	31	6	2	4	1	123	11.4%	9.6%
Large	24	8	11	0	0	1	0	44	4.1%	3.4%
Total Regional	283	256	202	150	119	61	11	1,082	100.0%	84.2%
TOTAL										
Small	236	226	163	150	126	56	10	967	75.3%	75.3%
Medium	84	51	36	17	8	8	1	205	16.0%	16.0%
Large	49	30	20	7	6	1	0	113	8.8%	8.8%
Total Member Clubs	369	307	219	174	140	65	11	1,285	100.0%	100.0%

Source: Golf Australia & member golf associations

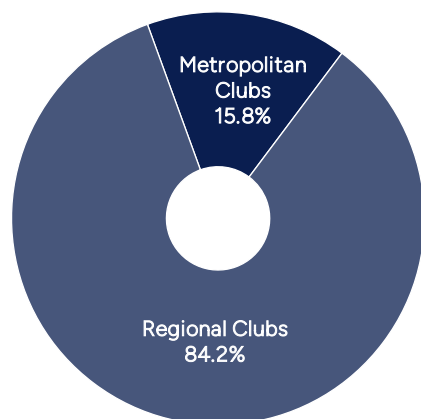


Chart 4: Australian clubs by region

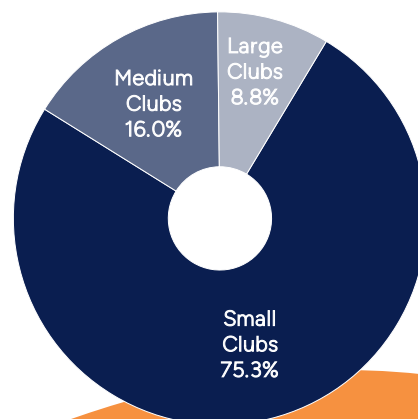
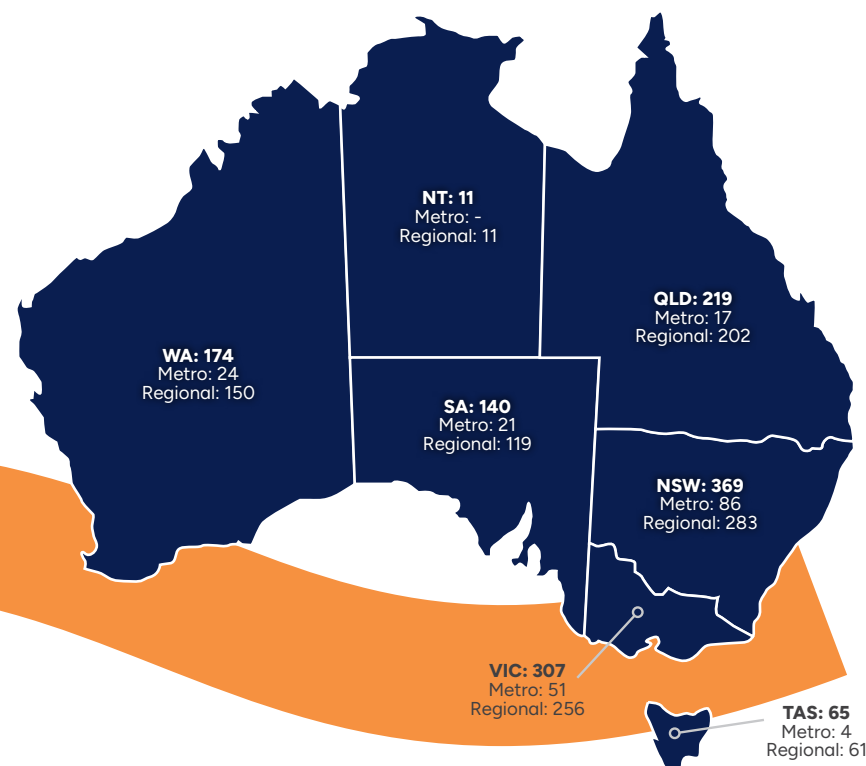


Chart 5: Australian clubs by size



PLAYING MEMBERS: KEY SEGMENTS

Member clubs

The overall national movement in 2023/24 for member clubs (the aggregate of metropolitan and regional clubs) was an increase of 4.2%. All states saw growth, with both Queensland and Tasmania reporting increases over 6%, followed closely by Western Australia with 5.6% growth.

Social clubs

As in the previous five years, social club membership continues to grow, increasing by 23.8% over the past year. With an average annual growth rate of 11.8% over the last five years, social club members now make up 8.6% of the total membership across Australia.

Growth in social clubs in South Australia is due to increases for Future Golf and Social Golf Australia, both of which are large social clubs that are affiliated in South Australia.

Metropolitan clubs

Metropolitan clubs saw an overall membership increase of 2.9%. All states, except Victoria, experienced growth compared to the previous year, with Queensland and Tasmania leading the way with increases of 8.9% and 8.1% respectively.

Regional clubs

Regional clubs saw an average increase of 5.0%, with growth reported in all states, led by South Australia with a 5.9% rise.

The share of membership numbers by region for each state is illustrated in Chart 6.

Table 16: Member clubs

	2023/24	% Change
NSW	167,442	3.7%
VIC	106,697	2.9%
QLD	73,553	6.2%
WA	30,025	5.6%
SA	27,314	4.8%
TAS	12,766	6.1%
NT	1,992	0.4%
Overall	419,789	4.2%

Source: Golf Australia & member golf associations

Table 17: Social clubs

	2023/24	% Change
NSW	1,493	35.1%
VIC	9,139	5.6%
QLD	30	-36.2%
WA	8,463	3.8%
SA	20,209	46.4%
TAS	20	-16.7%
NT	-	-
Overall	39,354	23.8%

Source: Golf Australia, member golf associations
 NB: There are no affiliated Social Clubs in the Northern Territory.

Table 18: Metropolitan clubs

	2023/24	% Change
NSW	67,741	2.3%
VIC	46,822	0.0%
QLD	18,107	8.9%
WA	18,254	6.0%
SA	14,989	4.0%
TAS	2,954	8.1%
NT	-	-
Overall	168,867	2.9%

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

Table 19: Regional clubs

	2023/24	% Change
NSW	99,701	4.7%
VIC	59,875	5.3%
QLD	55,446	5.3%
WA	11,771	4.9%
SA	12,325	5.9%
TAS	9,812	5.5%
NT	1,992	0.4%
Overall	250,922	5.0%

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

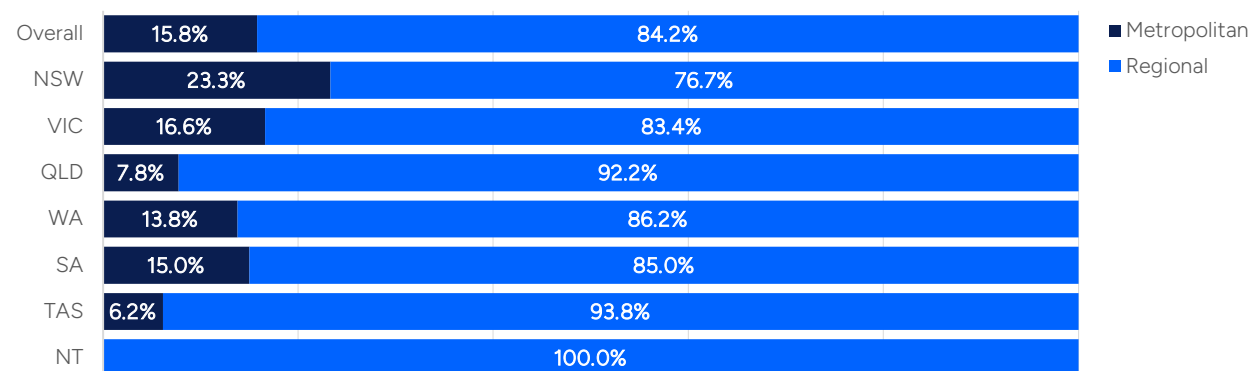


Chart 6: Share of membership numbers by region/club type

Golf Australia & member golf associations

Members by gender

Total men/boys and women/girls members increased by 6.2% and 3.2% respectively in 2023/24. Men/boys growth was notably strong in South Australia (19.1%) and Western Australia (8.1%), while the highest growth rates for women/girls were recorded in South Australia (19.9%) and Victoria (4.8%).

The resultant gender mix reported for 2023/24 sees women/girls share of membership remain at 18.1% of total members. Women/girls share of member numbers is above the national average in Victoria (20.1%) and Western Australia (18.8%).

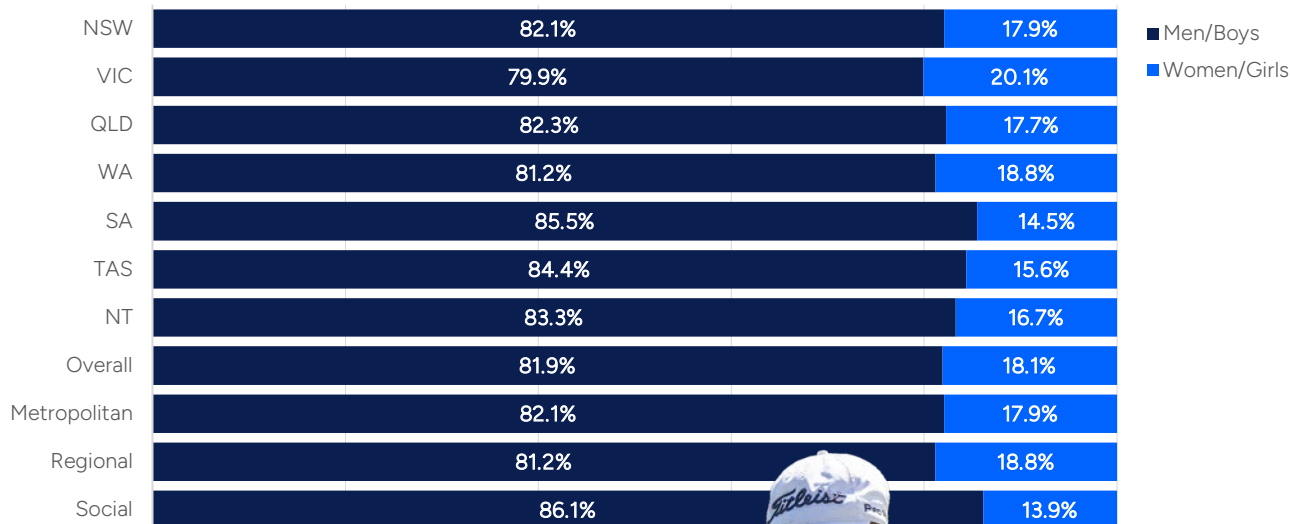


Chart 7: Gender mix by location

Source: Golf Australia & member golf associations

Table 20: Men/boys and women/girls members by state

	Men/Boys	% Change	Women/Girls	% change
NSW	138,660	4.6%	30,275	1.2%
VIC	92,577	2.7%	23,259	4.8%
QLD	60,563	6.7%	13,020	3.5%
WA	31,255	8.1%	7,233	-5.9%
SA	40,640	19.1%	6,883	19.9%
TAS	10,791	6.8%	1,995	2.3%
NT	1,659	1.2%	333	-3.3%
Overall	376,145	6.2%	82,998	3.2%

Source: Golf Australia & member golf associations



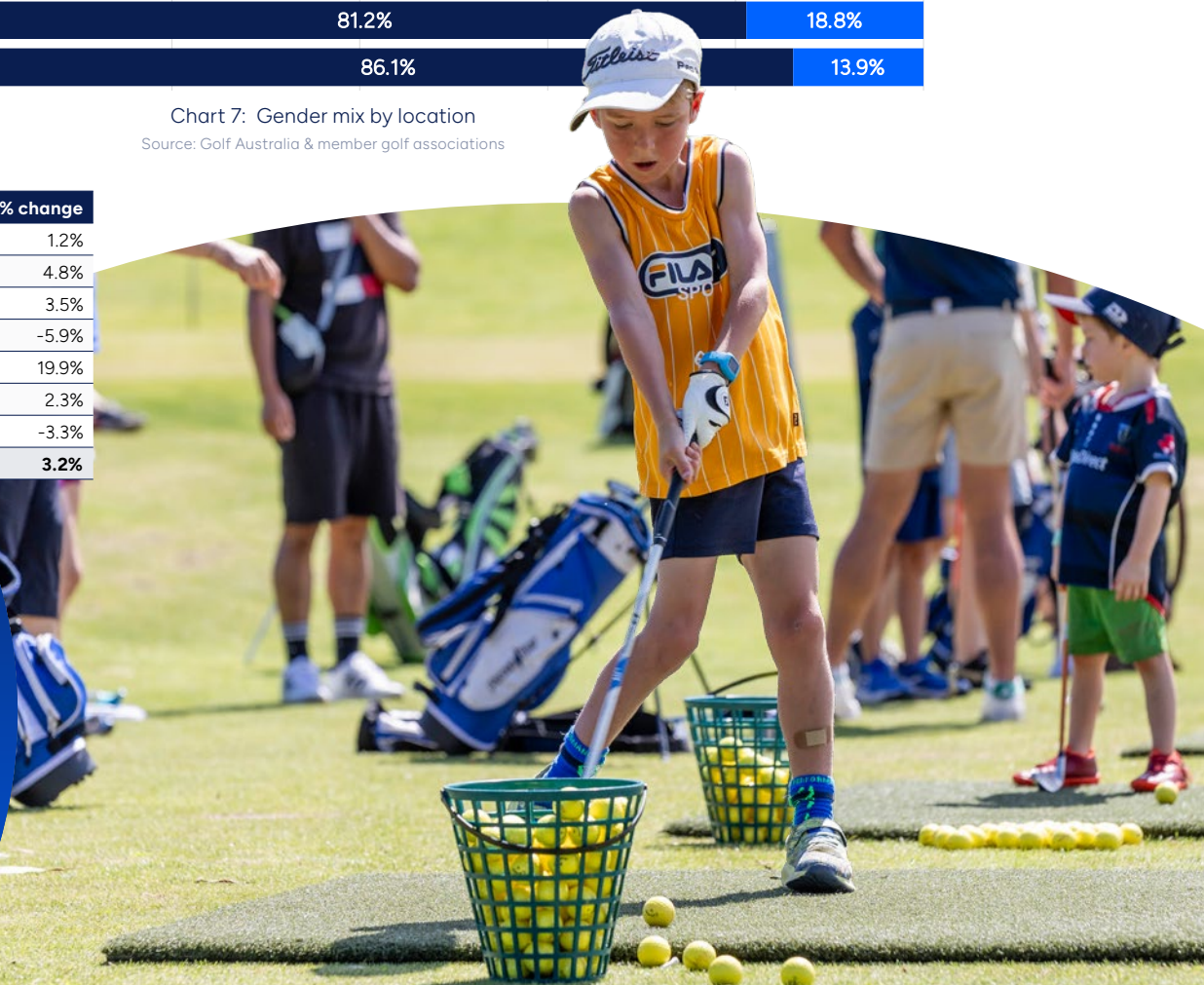
6.2%

MEMBERSHIP GROWTH
MEN/BOYS



3.2%

MEMBERSHIP GROWTH
WOMEN/GIRLS



Juniors

Junior members (under the age of 18) totalled 23,627 in 2023/24, which represents an increase of 33.4% over the prior year. This positive result was driven by reported outcomes in New South Wales (+34.7%) and Victoria (+27.4%) which combined had 3,746 new junior members join their clubs.

Overall, junior members represent 5.1% of the total member count across the country. Junior representation is slightly higher at regional clubs (5.8%) than metropolitan clubs (5.1%). Tasmania has the highest share of junior golfers, representing 6.4% of all club golfers.

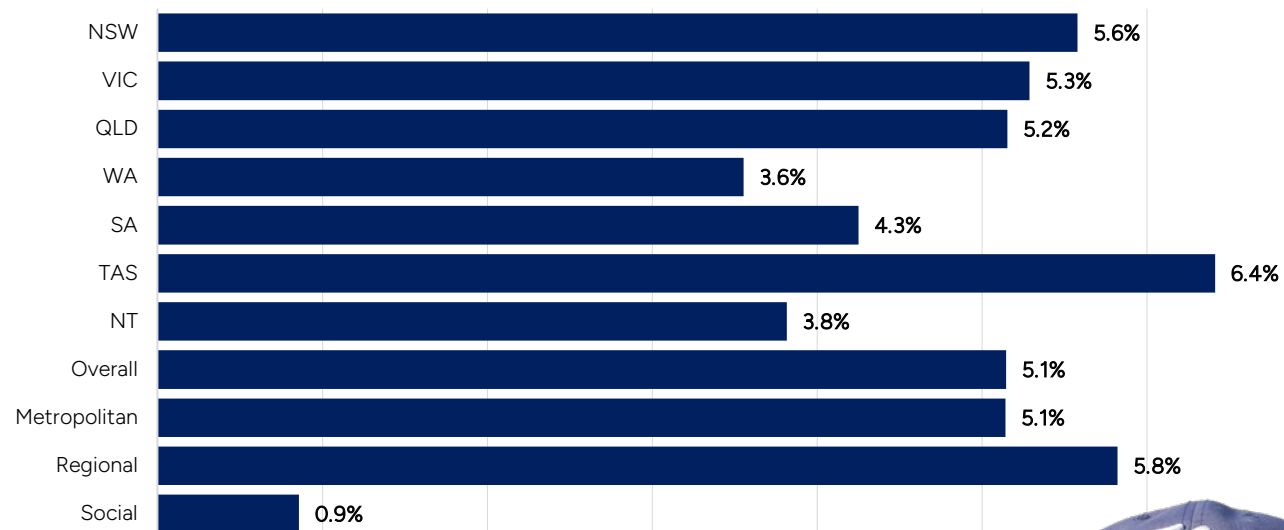


Chart 8: Junior mix by state

Source: Golf Australia & member golf associations

Table 21: Junior members by location

	Boys	% change	Girls	% change	Total Juniors	Total % change
NSW	8,284	39.5%	1,141	7.6%	9,425	34.7%
VIC	5,369	28.7%	757	19.0%	6,126	27.4%
QLD	2,982	37.9%	810	9.3%	3,792	30.6%
WA	1,069	31.0%	299	33.5%	1,368	31.5%
SA	1,765	53.3%	255	19.2%	2,020	48.0%
TAS	736	54.9%	84	35.5%	820	52.7%
NT	62	26.5%	14	-12.5%	76	16.9%
Overall	20,267	37.3%	3,360	13.8%	23,627	33.4%

Source: Golf Australia & member golf associations

33.4%

INCREASE IN
JUNIOR MEMBERS
OVER 12 MONTHS



PLAYING MEMBERS: AGE PROFILE

Member age profile

The average reported age of club members across Australia is 54.9 years. Men/boys have an average age of 53.1 years (53.9 last year) with women/girls averaging 19.9% higher at 63.7 years (64.8 last year).

New member age profile

New members to club golf generally exhibit a younger age profile than the broader club member age profile. In 2023/24, the average age of new men/boys members averaged 41 years, with new women/girls averaging 52 years of age. Approximately 68.3% of new members were under the age of 55, compared to 42.4% for existing members.

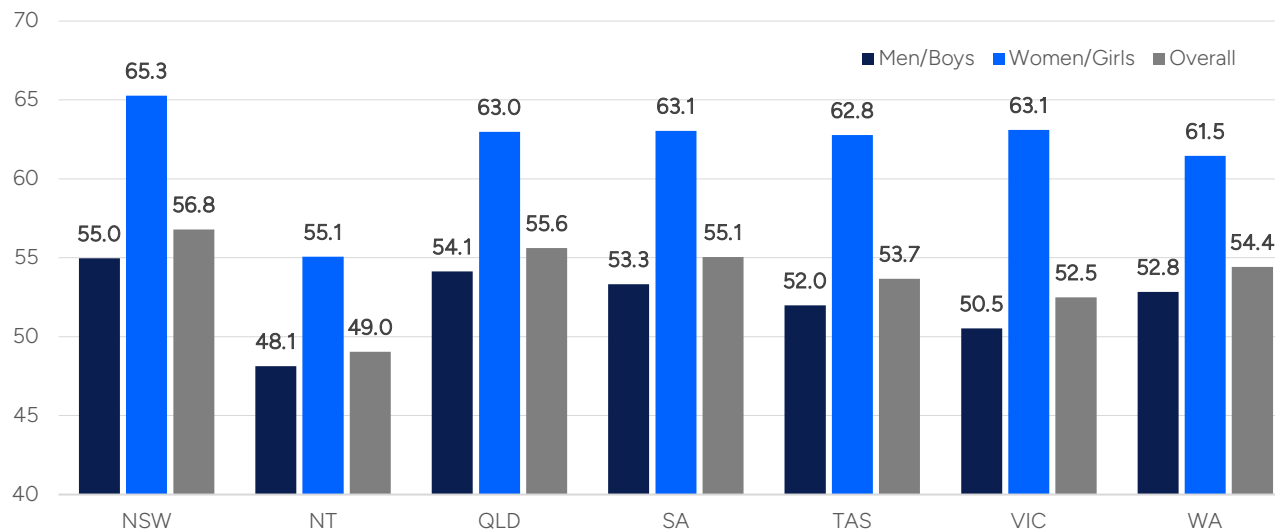


Chart 9: Average member age by state

Source: GOLF Link

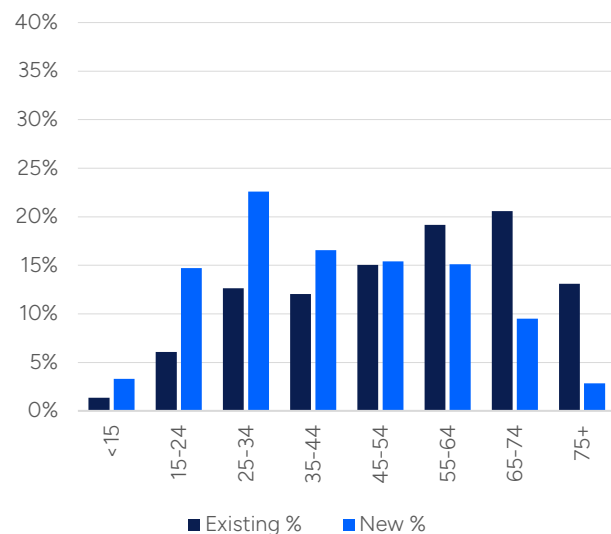


Chart 10: New men/boys members age profile compared to existing members

Source: GOLF Link

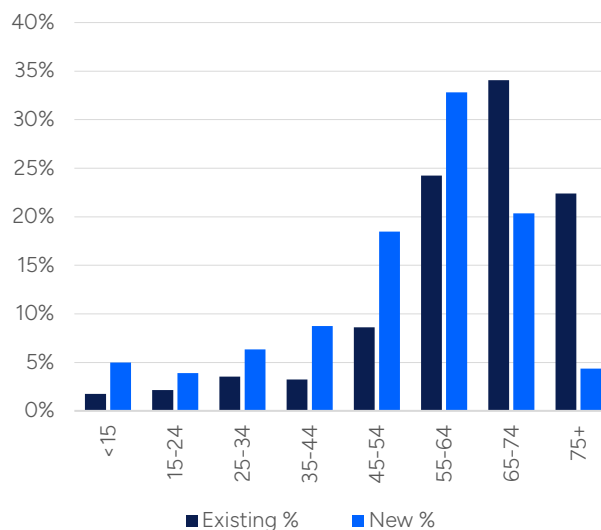
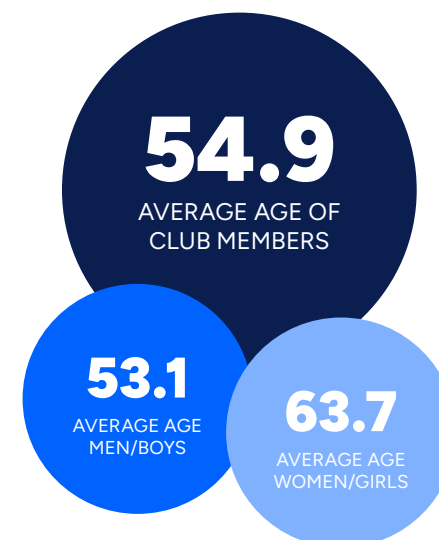


Chart 11: New women/girls members age profile compared to existing members

Source: GOLF Link



Age pyramid – members versus population by gender

Chart 12 illustrates the current mix of club members by gender compared to the broader national population above 10 years of age.

The chart shows a material portion of club members in the 55+ years age bracket - 53% of men/boys members and 80.9% of women/girls members - versus a lower national population share of this cohort of 32.3%.

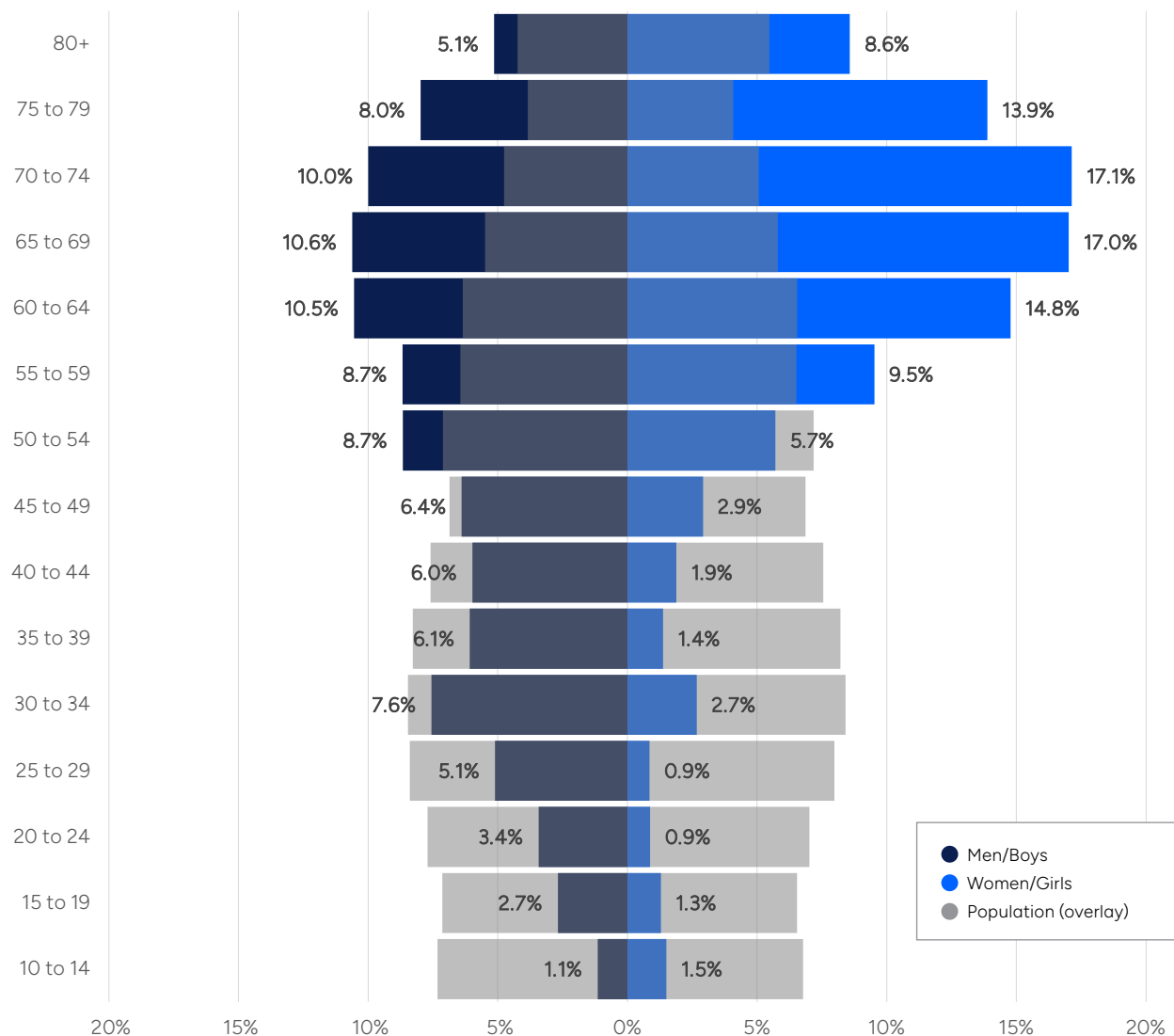


Chart 12: Age pyramid, members versus population

07

Playing Members: Results by State-Based Districts

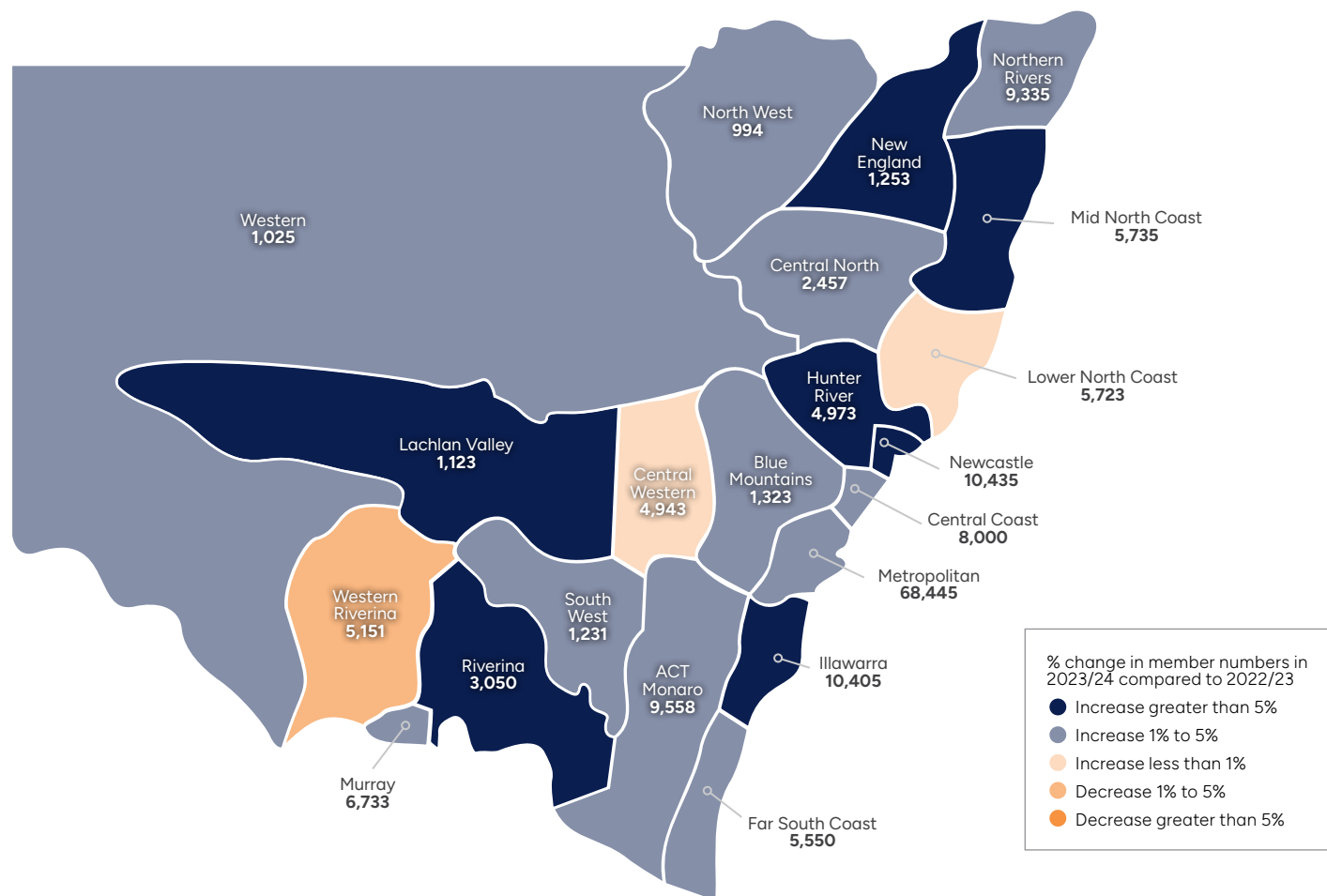
NEW SOUTH WALES

18 of the 21 districts in New South Wales experienced a net increase in membership numbers in 2023/24, led by the Newcastle and Hunter River districts which both recorded increases of over 11%.

Table 22: New South Wales membership numbers by cohorts

	2019	2020	2021	2022/23	2023/24	% change
Metropolitan	59,989	65,824	65,361	66,205	67,741	2.3%
Regional	85,924	92,186	93,567	95,209	99,701	4.7%
Total	145,913	158,010	158,928	161,414	167,442	3.7%
Social	0	719	1,334	1,105	1,493	35.1%
Total	145,913	158,729	160,262	162,519	168,935	3.9%
Men	113,376	124,245	125,136	126,674	130,376	2.9%
Women	27,094	28,141	28,672	28,848	29,134	1.0%
Boys	4,597	5,395	5,405	5,937	8,284	39.5%
Girls	846	948	1,049	1,060	1,141	7.6%
Total	145,913	158,729	160,262	162,519	168,935	3.9%

Source: Golf Australia



VICTORIA

13 of the 16 districts in Victoria experienced an increase in member numbers in 2023/24, led by Northern at 15.8%, followed by South Gippsland at 12.1%.

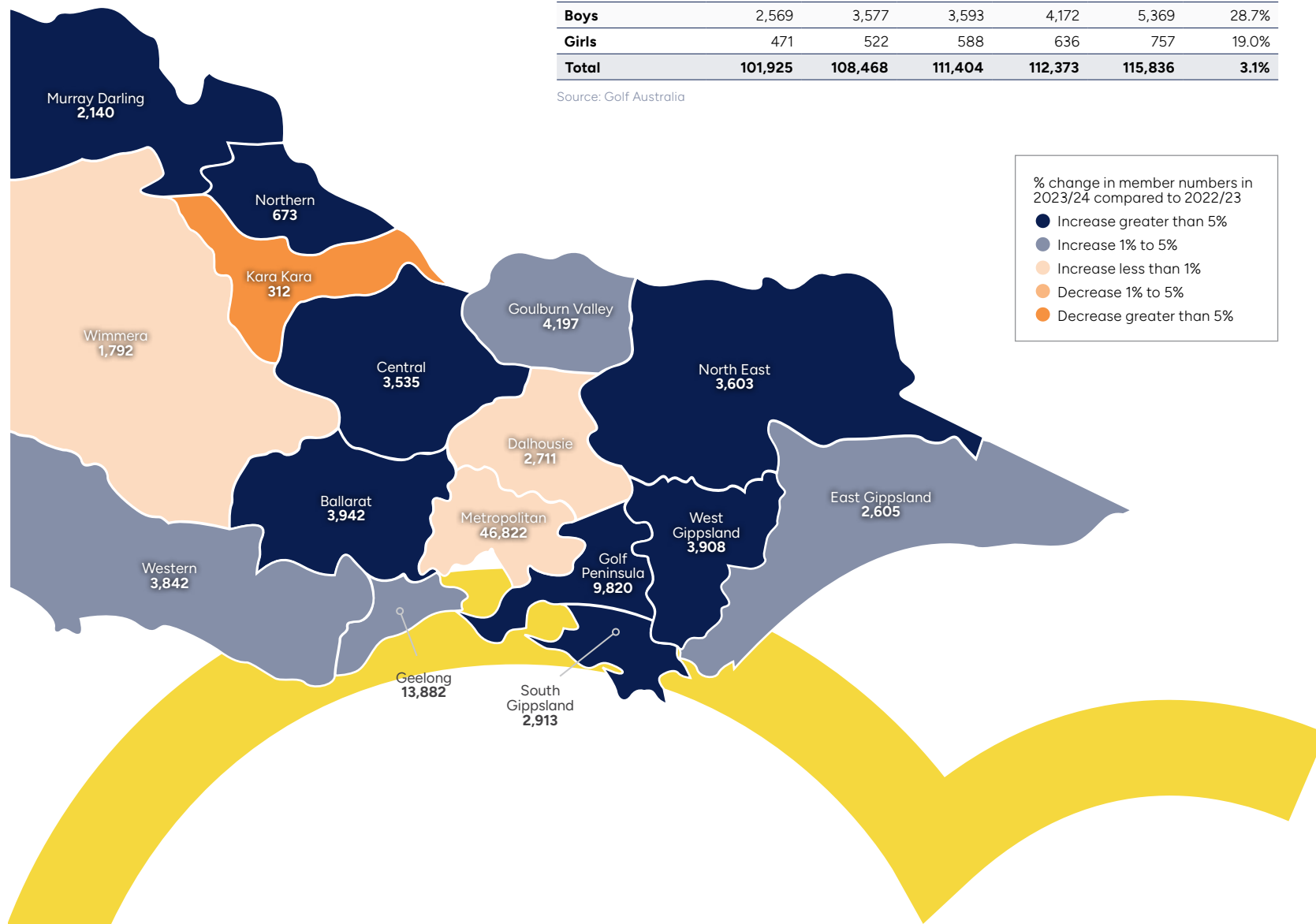


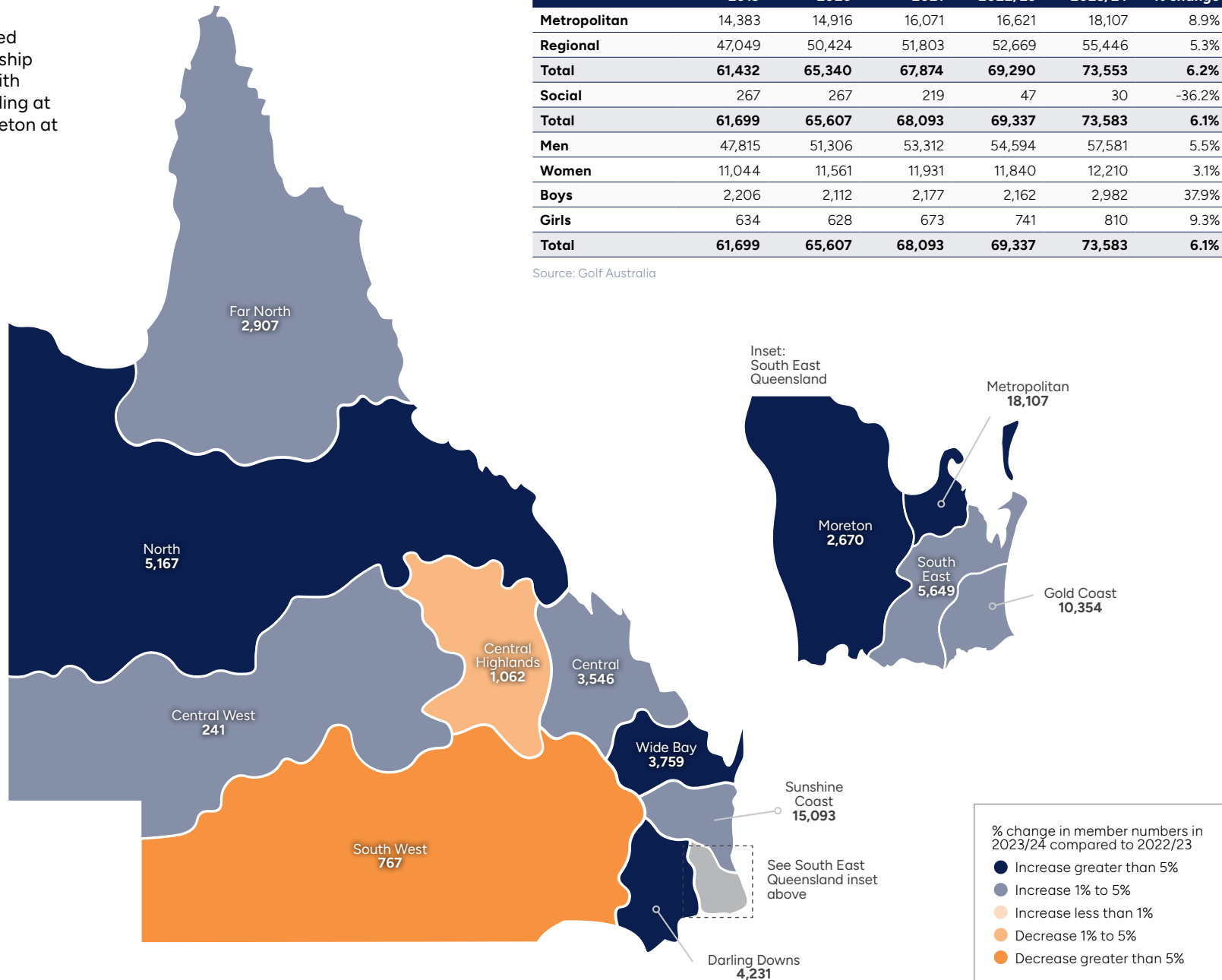
Table 23: Victoria membership numbers by cohorts

	2019	2020	2021	2022/23	2023/24	% change
Metropolitan	42,890	45,127	46,460	46,843	46,822	0.0%
Regional	48,694	55,038	56,310	56,878	59,875	5.3%
Total	91,584	100,165	102,770	103,721	106,697	2.9%
Social	10,341	8,303	8,634	8,652	9,139	5.6%
Total	101,925	108,468	111,404	112,373	115,836	3.1%
Men	77,951	83,792	85,652	86,003	87,208	1.4%
Women	20,934	20,577	21,571	21,562	22,502	4.4%
Boys	2,569	3,577	3,593	4,172	5,369	28.7%
Girls	471	522	588	636	757	19.0%
Total	101,925	108,468	111,404	112,373	115,836	3.1%

Source: Golf Australia

QUEENSLAND

11 of the 13 districts in Queensland experienced an increase in membership numbers in 2023/24, with the Darling Downs leading at 16.7%, followed by Moreton at 11.7%.



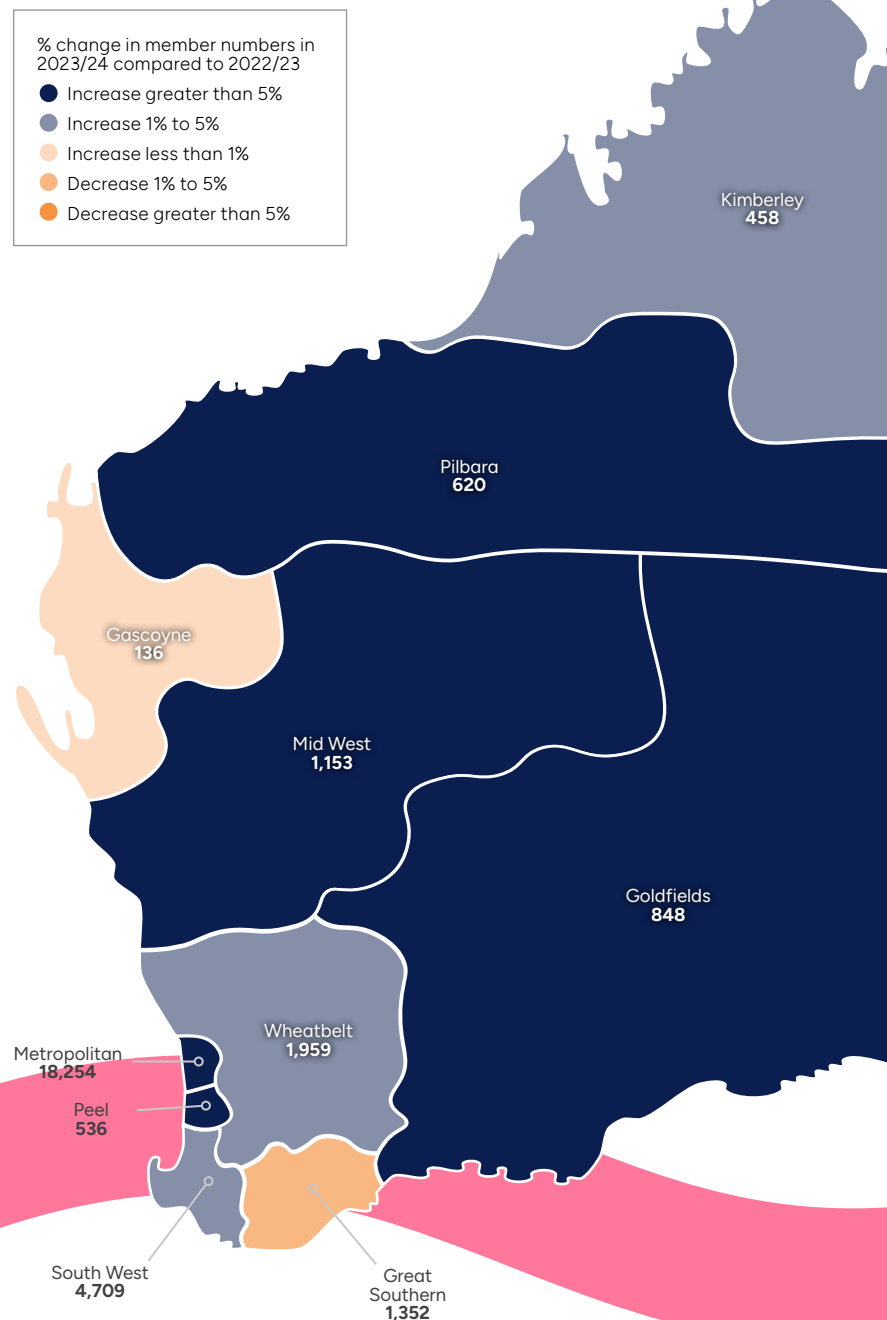
WESTERN AUSTRALIA

8 of the 10 districts in Western Australia experienced an increase in member numbers in 2023/24, led by the Mid West and Pilbara, both with increases of above 12%.

Table 25: Western Australia membership numbers by cohorts

	2019	2020	2021	2022/23	2023/24	% change
Metropolitan	15,263	16,403	16,821	17,219	18,254	6.0%
Regional	10,312	10,938	10,978	11,225	11,771	4.9%
Total	25,575	27,341	27,799	28,444	30,025	5.6%
Social	6,489	7,182	7,599	8,156	8,463	3.8%
Total	32,064	34,523	35,398	36,600	38,488	5.2%
Men	24,745	27,000	27,171	28,101	30,186	7.4%
Women	6,568	6,625	7,266	7,459	6,934	-7.0%
Boys	601	713	766	816	1,069	31.0%
Girls	150	185	195	224	299	33.5%
Total	32,064	34,523	35,398	36,600	38,488	5.2%

Source: Golf Australia



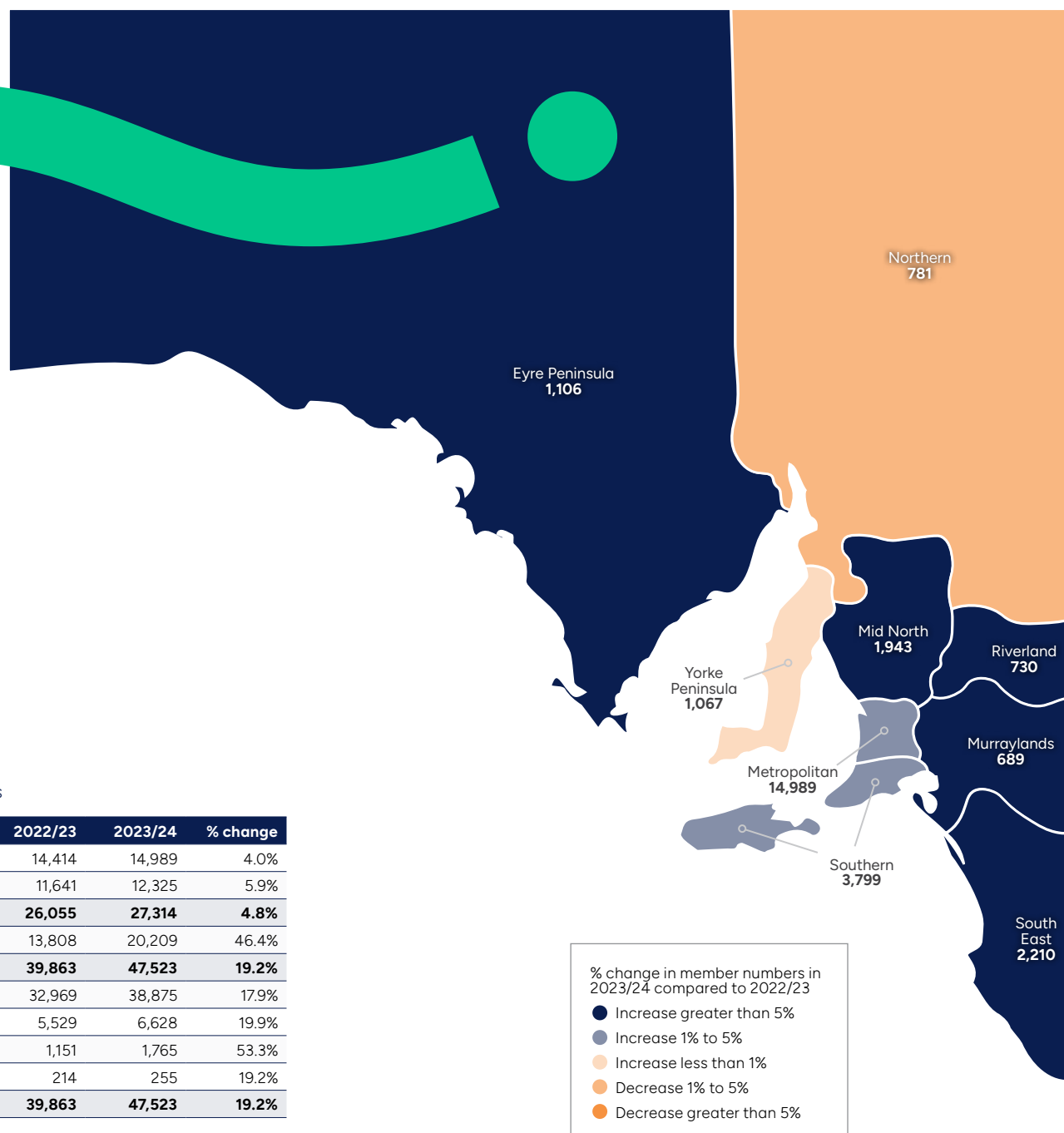
SOUTH AUSTRALIA

7 of the 9 districts in South Australia experienced an increase in membership numbers in 2023/24, with the Riverland leading at 24.4%, followed by Murraylands with a 14.5% rise.

Table 26: South Australia membership numbers by cohorts

	2019	2020	2021	2022/23	2023/24	% change
Metropolitan	13,090	13,680	14,343	14,414	14,989	4.0%
Regional	10,009	11,090	11,556	11,641	12,325	5.9%
Total	23,099	24,770	25,899	26,055	27,314	4.8%
Social	8,129	10,892	12,069	13,808	20,209	46.4%
Total	31,228	35,662	37,968	39,863	47,523	19.2%
Men	25,270	29,264	31,180	32,969	38,875	17.9%
Women	5,121	5,265	5,510	5,529	6,628	19.9%
Boys	693	959	1,075	1,151	1,765	53.3%
Girls	144	174	203	214	255	19.2%
Total	31,228	35,662	37,968	39,863	47,523	19.2%

Source: Golf Australia



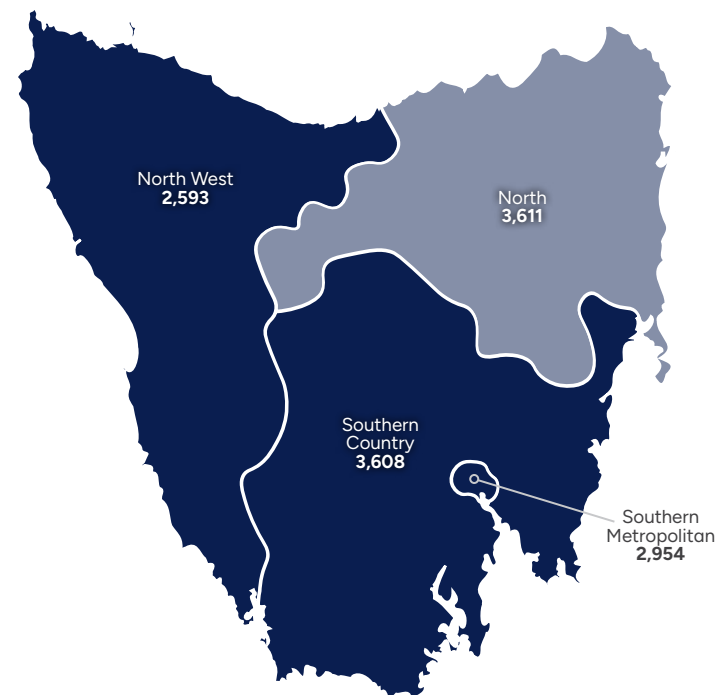
TASMANIA

All districts in Tasmania recorded increases in 2023/24, with the North West leading the way with a 9.9% rise in club members.

Table 27: Tasmania membership numbers by cohorts

	2019	2020	2021	2022/23	2023/24	% change
Metropolitan	2,083	2,169	2,545	2,732	2,954	8.1%
Regional	7,818	8,184	8,945	9,298	9,812	5.5%
Total	9,901	10,353	11,490	12,030	12,766	6.1%
Social	58	72	30	24	20	-16.7%
Total	9,959	10,425	11,520	12,054	12,786	6.1%
Men	8,067	8,491	9,301	9,628	10,055	4.4%
Women	1,619	1,631	1,749	1,889	1,911	1.2%
Boys	241	269	430	475	736	54.9%
Girls	32	34	40	62	84	35.5%
Total	9,959	10,425	11,520	12,054	12,786	6.1%

Source: Golf Australia

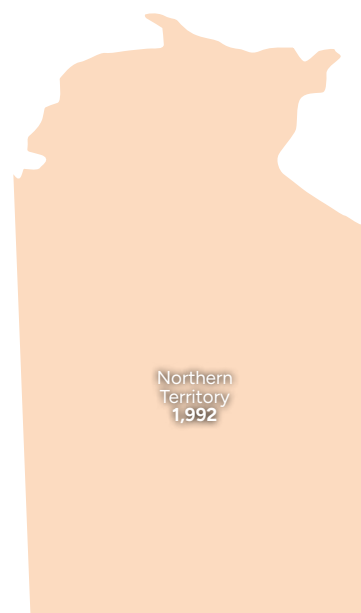


NORTHERN TERRITORY

Table 28: Northern Territory membership numbers by cohorts

	2019	2020	2021	2022/23	2023/24	% change
Metropolitan	-	-	-	-	-	0.4%
Regional	1,825	1,942	2,135	1,985	1,992	0.4%
Total	1,825	1,942	2,135	1,985	1,992	0.4%
Social	0	0	0	0	0	0.0%
Total	1,825	1,942	2,135	1,985	1,992	0.4%
Men	1,463	1,561	1,726	1,591	1,597	0.4%
Women	302	317	343	329	319	-2.9%
Boys	44	48	51	49	62	26.5%
Girls	16	16	15	16	14	-12.5%
Total	1,825	1,942	2,135	1,985	1,992	0.4%

Source: Golf Australia



% change in member numbers in 2023/24 compared to 2022/23

- Increase greater than 5%
- Increase 1% to 5%
- Increase less than 1%
- Decrease 1% to 5%
- Decrease greater than 5%

08

Competition Rounds

TOTAL COMPETITION ROUNDS

Total competition rounds played in 2023/24 increased by 8.1% (917,636 rounds) over 2022/23, reaching 12.3 million. Assisted by overall membership growth, a much stronger winter period in 2023 (+25%) was the key period for this increase.

Table 29: Total competition rounds

	2021/22	2022/23	2023/24	% change
NSW	4,070,507	4,160,832	4,553,312	9.4%
VIC	2,460,364	2,833,312	3,202,224	13.0%
QLD	1,886,678	2,089,556	2,115,603	1.2%
WA	1,101,574	1,101,439	1,143,578	3.8%
SA	864,068	839,768	896,797	6.8%
TAS	305,384	305,110	334,556	9.7%
NT	48,891	48,387	49,970	3.3%
Total	10,737,466	11,378,404	12,296,040	8.1%

Source: GOLF Link, Golf Australia

AVERAGE COMPETITION ROUNDS PER MEMBER

(The following analysis includes members from Member Clubs only).

With playing members increasing in 2023/24, average annual rounds played on a per member basis (those playing one round or more) also increased, driving rounds growth. Average frequencies grew by two rounds per member to reach an average of 31 for the year. The largest average rounds increases were recorded in Victoria (14.1%) and Tasmania (10.4%).

Table 30: Average competition rounds per member

	2021/22	2022/23	2023/24	% change
NSW	28.2	28.8	30.9	7.3%
VIC	24.7	27.5	31.4	14.1%
QLD	27.7	29.8	29.2	-1.8%
WA	32.8	33.2	34.5	4.0%
SA	30.4	29.4	31.2	6.0%
TAS	28.0	27.6	30.4	10.4%
NT	23.8	23.4	23.2	-0.8%
Total	27.7	29.0	31.0	6.9%

Source: GOLF Link, Golf Australia



AVERAGE COMPETITION ROUNDS PER MEMBER BY AGE

Average competition rounds played by age cohort steadily grows through to the 70 year age group.

Chart 13 illustrates the trend for 2023/24, with average round frequencies peaking for members aged in their 70s at 42 rounds per member annually.

By contrast, younger members have a significantly lower round frequency, with most cohorts under the age of 45 playing an average of less than 20 rounds per member.

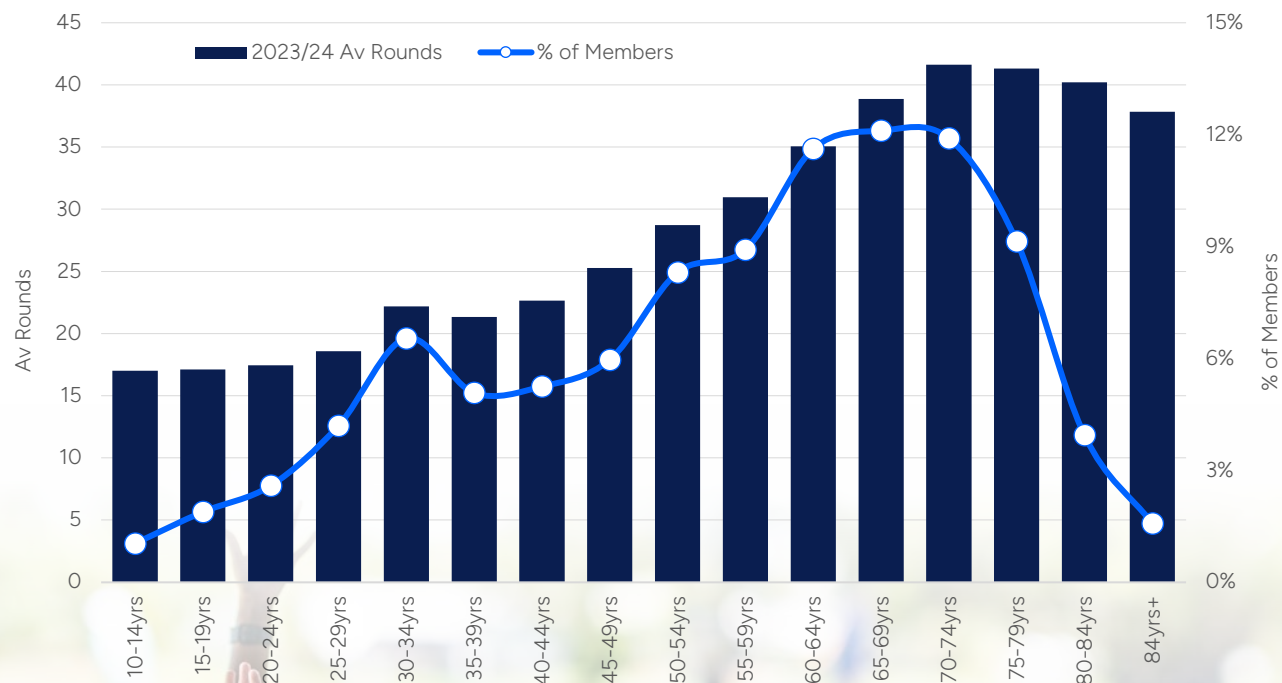


Chart 13: Average competition rounds by age cohort





w golf.org.au
e email@golf.com.au

Australian Golf Centre
Sandringham Golf Links,
Cheltenham Road,
Cheltenham, VIC 3192
Australia