



GolfAustralia

2017

Golf Club Participation Report

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01 KEY FINDINGS

A SNAPSHOT OF THE 2017 GOLF CLUB PARTICIPATION REPORT

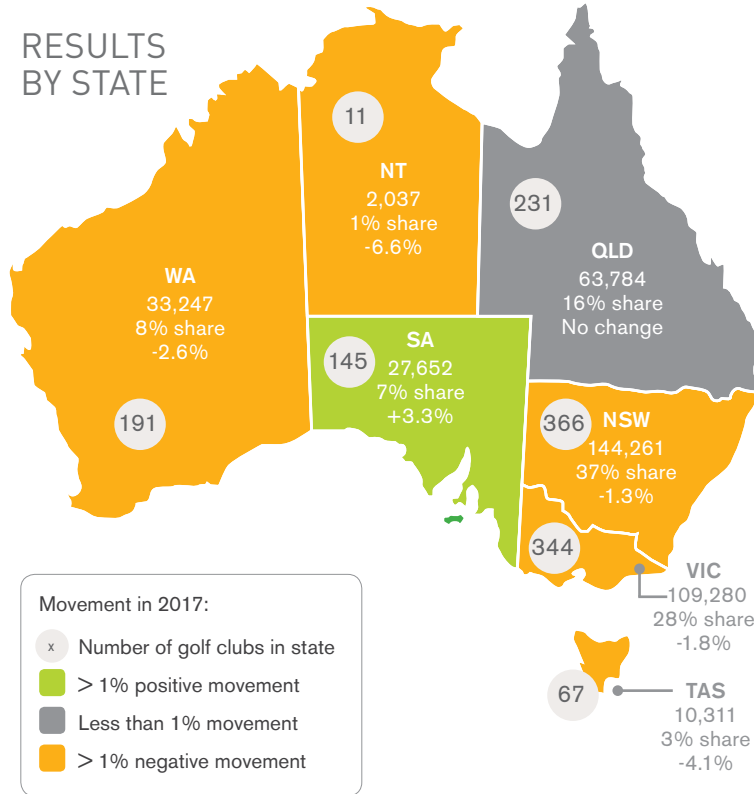
TOTAL CLUB MEMBERS

389,672

1.1% decline from 2016

Average annual decline 0.7% over past 5 years

RESULTS BY STATE



56 yrs

64 yrs

Average age of male and female members is 56.1 years and 64.1 years respectively

20% female share of membership base

NATIONAL ATTRITION RATE
6.9%

PARTICIPATION RATE: MEMBERS AS % OF POPULATION

OVERALL:

1.6%

METROPOLITAN: **1.0%** REGIONAL: **2.2%**

Clubs experiencing growth:

37%

of course-based clubs grew member numbers by >2% in 2017

METROPOLITAN CLUB MEMBERS

150,691 across 205 clubs

39% of members

1.1% decline from 2016

REGIONAL CLUB MEMBERS

216,693 across 1,130 clubs

56% of members

1.5% decline from 2016

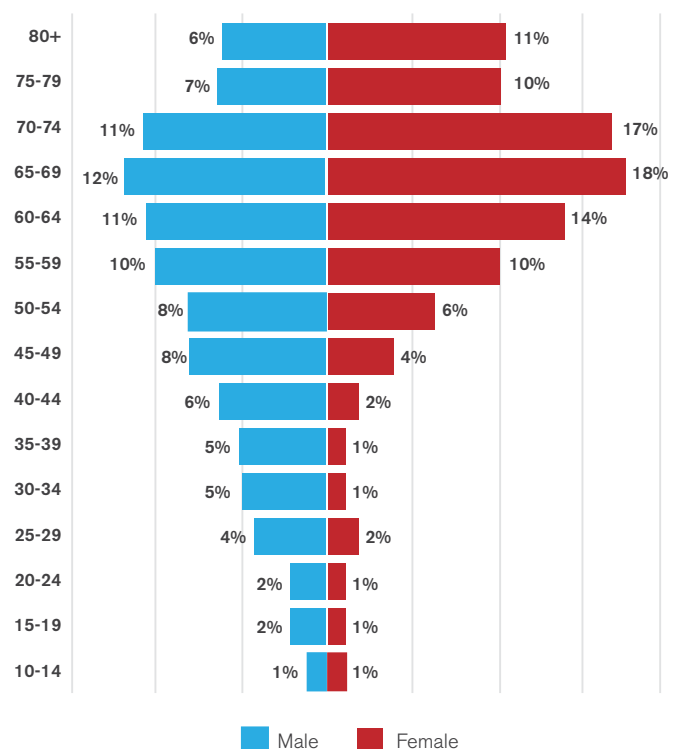
SOCIAL CLUB MEMBERS

22,298 members across 321 clubs

5% of members

3.3% increase from 2016

AGE DISTRIBUTION BY GENDER



02 REPORT BACKGROUND



Introduction

Golf Australia is pleased to present to you the **2017 Golf Club Participation Report**. It continues to be the goal of Golf Australia to provide the wider golf industry with timely participation information that enables the sport to understand the current landscape and trends in golf participation.

Now in its 5th year in this format, it is hoped that this report is becoming an increasingly **valuable reference as clubs seek to develop evidenced based strategies that will enhance the future growth** and overall sustainability of the game.



About the Author

Seeking independence of data analysis and subsequent interpretation with this project, Golf Australia sought the expertise of Golf Business Advisory Services (GBAS) to draft this report. GBAS has authored the past four participation reports for Golf Australia, along with a number of other leading industry reference reports in Australia and overseas covering topics such as club operational and salary benchmarking, membership attrition and retention, national rounds played, and golf retail operations.

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



03 BROADER GOLF PARTICIPATION TRENDS

Introduction

In 2016 the Australian Sports Commission (ASC) re-started its reporting on sports participation in Australia. Titled AusPlay, this new, and now to be annual, release of annual participation data enables the sport to better understand and measure the ongoing trend in broader participation numbers in the sport.

Prior to this new report, the sport previously sought national participation guidance from the ASC's annual Exercise, Recreation & Sport Surveys (ERASS), these reports published from 2000 through to 2011. Whilst a slightly different methodology was used in the Ausplay research, in order to create some guidance as to the longer-term trend in overall participation in golf and in the absence of other reliable reference points, results from the ERASS reports from 2004 to 2010, and the two new data sets from the first two AusPlay reports published in 2017 and 2018 have been combined to create a long-term view of the historical participation trends in golf.

AusPlay Sport Participation

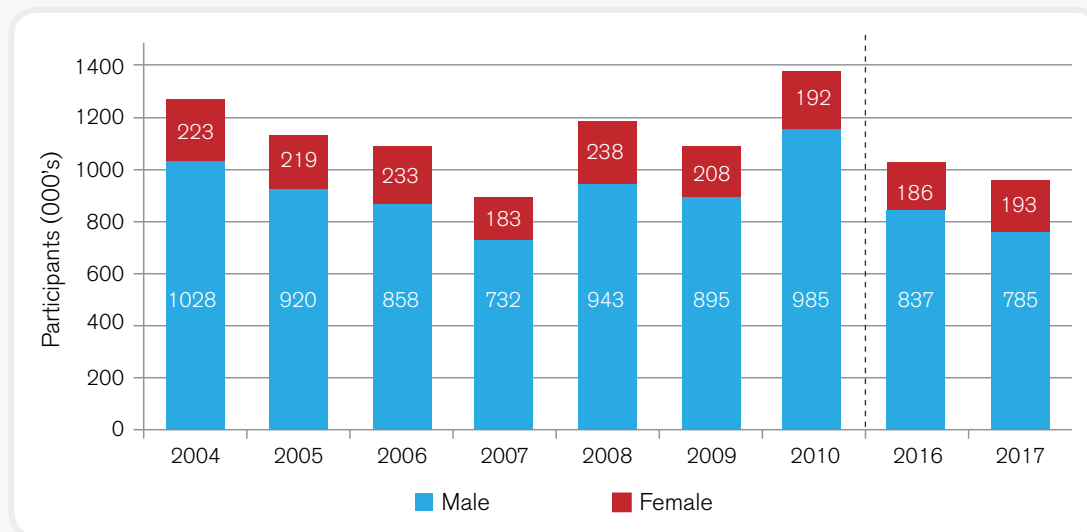
Released in April 2018, data from Ausplay 2017 indicates a total of 980,000 people, or approximately 5% of the population, participated in golf in the 12-month period. This result is slightly under that reported in 2016 (1.022m) and indicates a fall of approximately 4% over the prior year. Over the longer term this result contributes to an average annual decline of 1.9% per year in total participation numbers since 2004.

For the annual period other key outcomes included:

- A 6% decline in male participation numbers, representing an average annual decline of 2% since 2004.
- A 4% increase in female participation numbers, representing an average annual decline of 1% since 2004
- Males account for 80% of all golfers, steady over the period.

The annual results by gender are illustrated below in Chart 1.

Chart 1 - Annual golf participants by gender



Source: ERASS, AusPlay

03 BROADER GOLF PARTICIPATION TRENDS (CONT)

Assessment of the AusPlay results by age cohort reveals a continuation of the trend that first began to emerge in 2007. This trend is a continuing increase in the number of participants in the age cohorts over 55 years, and a decline in the age cohorts younger than 55 years.

Specific findings for 2017 include:

- The 25 to 44 year age cohort now accounts for 20% of total golfers, down from 30% ten years ago.
- The size of the age cohort 35-44 years has halved since 2010, now accounting for 11% of total demand.
- The 65 year plus age cohort has increased to 38% of total golf demand, doubling since 2008.

The annual results by age cohort are illustrated in Chart 2.

Chart 2 – Annual golf participation rate percentage by age cohort



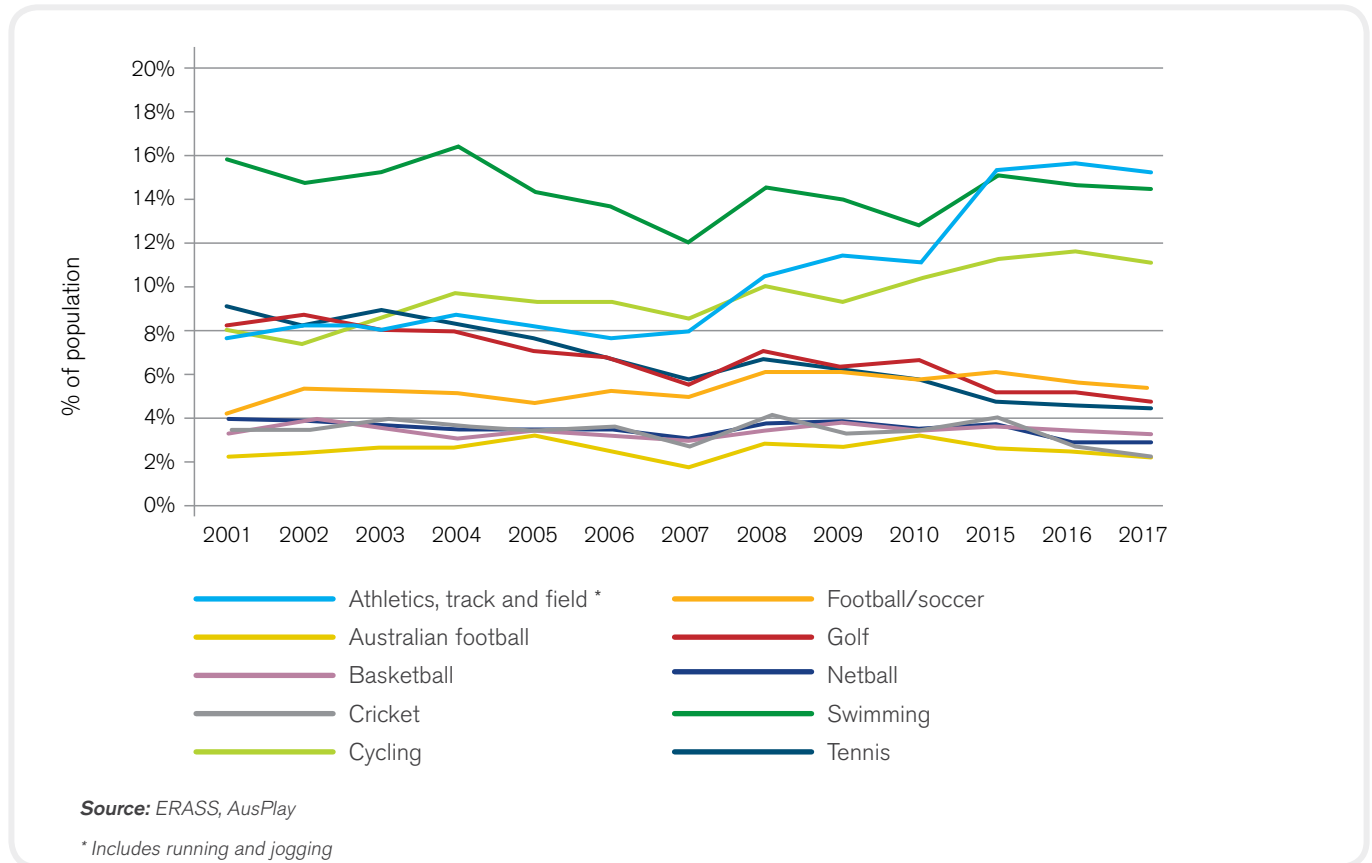
Source: ERASS, AusPlay

03 BROADER GOLF PARTICIPATION TRENDS (CONT)

Overall Participation – Top 10 Sports

By utilising data from ERASS and AusPlay for the past two years, long term participation trends can be extracted for a number of major sports including golf. Comparing the outcomes achieved can provide further context to the trend seen within golf participation. Depicted in the chart below are the trends evident in the top 10 sports in terms of overall (defined here as 'at least annually') participation.

Chart 3 – Overall participation, top 10 sports



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

- Increases are generally more evident in non-structured sports while declines tend to be more evident in structured sports
- A material decline in golf participation is evident for golf both in absolute terms and relative to other sports
- Tennis has experienced a similar decline to golf over this period.
- Cycling, athletics, track & field and football/soccer have all seen increased participation over the period.



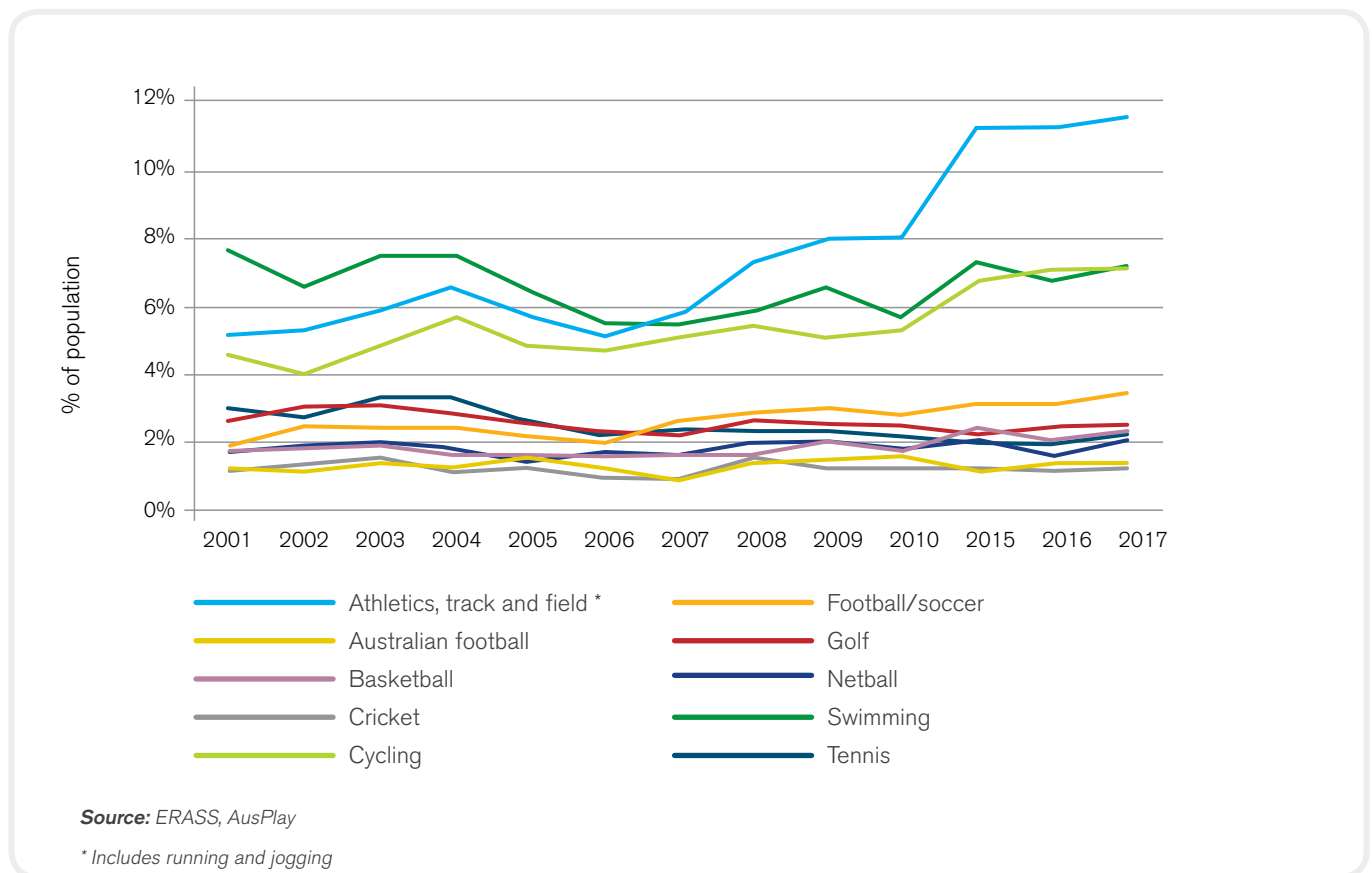
03 BROADER GOLF PARTICIPATION TRENDS (CONT)

Regular Participation – Top 10 Sports

While overall participation is a key measure, another key measure for golf is regular participation (**defined here as ‘at least weekly’**). When the long-term trend over this time period is measured in terms of regular participation, a different pattern for golf emerges.

Under this assessment, the data indicates that golf has performed more steadily over the period with a consistent regular participation rate of just under 3% of the population. This trend reflects the size of the core club member market and indicates that golf’s annual outcomes from a wider participation perspective are being impacted by the frequency of play (or not) of the less frequent golfer.

Chart 4 – Regular participation, top 10 sports



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

- The level of regular participation in the sports of cycling, athletics, track & field and football/soccer have all increased over the period.
- For most of the other top 10 sports, regular participation levels are generally flat.

04 NATIONAL CLUB MEMBERSHIP OVERVIEW

Member Golf Association Reporting

Club golfer numbers are reported annually each year by the seven respective state and territory member golf association (MGA) bodies. The reported numbers reflect those members who pay a capitation fee to their respective body, generally defined as those classified as 'having a class of membership that provides regular golf course access.' The respective reporting periods and the respective membership timing they represent are summarised in Table 1.

Table 1

| State | MGA Annual Report | Data Collected | Period |
|-----------|--------------------|----------------|--------------------------------------|
| NSW/ACT * | 2016/17 | May 2017 | Most recent completed financial year |
| VIC | Calendar Year 2017 | December 2017 | Most recent completed financial year |
| QLD | Calendar Year 2016 | January 2017 | Most recent completed financial year |
| SA | 2016/17 | December 2017 | Point in time |
| WA | 2016/17 | December 2017 | Point in time |
| TAS | Calendar Year 2017 | June 2017 | Point in time |
| NT | 2016/17 | December 2016 | Point in time |

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



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 however still remain 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 are classified as year ending 2017 numbers.



04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Profile of Australian Clubs

The current size profile of Australian golf clubs, based on the 1,656 clubs that reported playing membership numbers for 2017, is outlined by general geographic location and club size in Table 2.

Table 2

| Club Membership Size | Metro | Regional | Social | Total | % Clubs | % Members |
|----------------------|------------|--------------|------------|--------------|-------------|-------------|
| Less than 250 | 25 | 863 | 306 | 1,194 | 67% | 19% |
| 250 to 499 | 44 | 144 | 13 | 201 | 14% | 19% |
| 500 to 749 | 44 | 69 | 1 | 114 | 8% | 19% |
| 750 to 999 | 41 | 34 | 0 | 73 | 5% | 17% |
| 1,000+ | 51 | 20 | 1 | 74 | 5% | 26% |
| Total | 205 | 1,130 | 321 | 1,656 | 100% | 100% |
| % of clubs | 12% | 68% | 20% | 100% | | |
| Average size | 735 | 195 | 67 | 238 | | |

Source: State golf associations

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

- The average club size in Australia in 2017 is 238 members, with metropolitan clubs on average having more than three times the number of members as regional clubs.
- Two-thirds of clubs in Australia have less than 250 members, with 80% having less than 500 members.
- 68% of all clubs in Australia are located in a regional area.
- While clubs of over 1,000 members account for 5% of all clubs across Australia, they account for 26% of individual members.
- There are 321 social clubs affiliated to various state bodies, accounting for 19% of total clubs. These clubs either typically have semi-permanent access rights to a public golf course (eg. Golf League Clubs (VGL) in Victoria) or are a club that utilise Golfink for handicapping purposes in the events they deliver to their members.



04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Profile of Australian Clubs (cont)

The current size profile by state/territory for 2017 is outlined in Table 3.

Table 3

| Club Membership Size | NSW | VIC | QLD | WA | SA | TAS | NT | Total |
|-----------------------------------|------------|------------|------------|------------|------------|------------|------------|--------------|
| Social clubs | 0 | 117 | 1 | 127 | 75 | 1 | 0 | 321 |
| Course-based clubs | | | | | | | | |
| Less than 250 | 186 | 209 | 151 | 159 | 121 | 54 | 8 | 888 |
| 250 to 499 | 58 | 50 | 41 | 14 | 11 | 10 | 2 | 188 |
| 500 to 749 | 55 | 24 | 16 | 9 | 6 | 2 | 1 | 113 |
| 750 to 999 | 40 | 13 | 11 | 6 | 2 | 1 | 0 | 73 |
| 1,000 + | 27 | 26 | 12 | 3 | 5 | 0 | 0 | 73 |
| Total course-based clubs | 366 | 344 | 231 | 191 | 145 | 67 | 11 | 1,335 |
| Avg course-based club size | 394 | 300 | 275 | 139 | 164 | 153 | 185 | |

Source: State golf associations

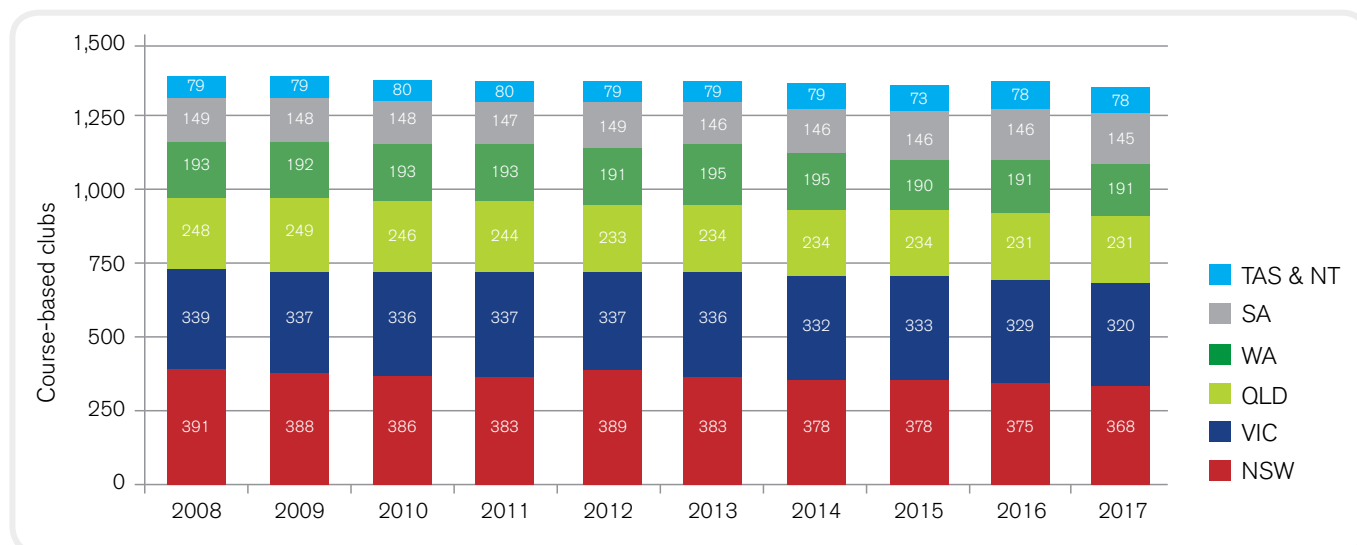
Key observations noted from the size profile data outlined above include:

- New South Wales has the most number of golf course-based clubs with 366, and the highest average member count with 394. The large number of metropolitan clubs in New South Wales largely drives this result.
- Western Australia has the highest number of social clubs with 127 with an increase of eight over 2016 and the lowest average member count at golf course-based clubs with 139.

Golf Course Based Clubs

There are currently 1,335 golf course-based clubs in Australia. There has been a decline of 4.6% in clubs over the past 10-year period, from a high of 1,399 in 2008. The reduction in 2017 is being driven by NSW and Victoria, where seven and nine fewer clubs respectively have reported membership numbers. Two of these are related to amalgamations in the Victoria metropolitan region, with the rest being regional clubs. This data is depicted in Chart 5.

Chart 5 – Course-based clubs annual count



Source: ERASS, AusPlay

04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Club Playing Members

2017 National Total

For the 2017 period, national membership numbers across Australia were reported as 389,672. This result marked a 1.1% decline on numbers reported for the prior 12-month period, equating to a nett loss of 4,365 members.

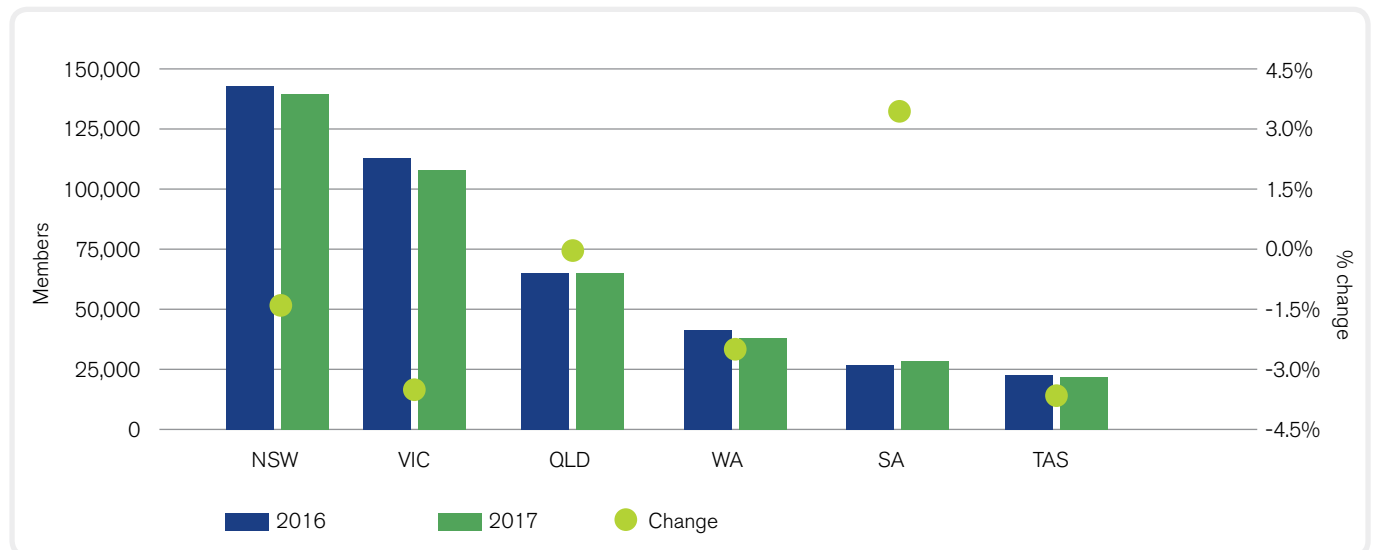
Only Queensland and South Australia experienced a nett gain in membership numbers for the period, while the decline in New South Wales and Victoria was the most significant at just under 2,000 members in each state, equating to a 1.3% and 1.8% decline respectively. Chart 6 summarises these outcomes.



-1.1%

National membership numbers across Australia showed a 1.1% decline on numbers reported for the prior 12-month period.

Chart 6 – National results by state



Source: State golf associations



04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Participation Rate

The chart below shows the participation of registered golfers (including social club members) as a percentage of population. The overall participation rate across Australia is 1.6%, while participation rates above the national average are recorded in New South Wales, Victoria and Tasmania.

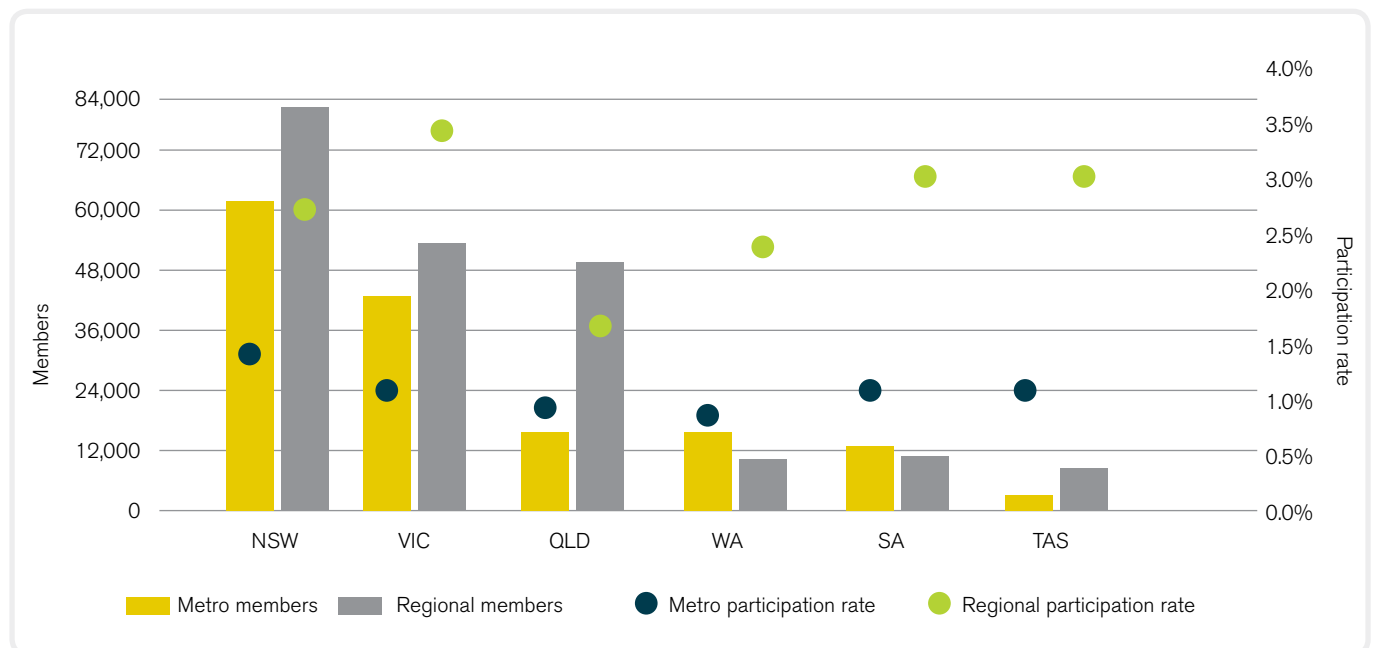
Chart 7 – Participation rate by state



Source: State golf associations, Australian Bureau of Statistics

The chart below depicts the participation of registered golfers (excluding social club members) as a percentage of each region's total population. The participation rate for all regional metropolitan areas is 2.2%, which is materially higher than the 1% applicable to metropolitan areas. These results by state/territory is depicted in Chart 8 below.

Chart 8 – Participation rate, metropolitan and regional



Source: State golf associations, Australian Bureau of Statistics

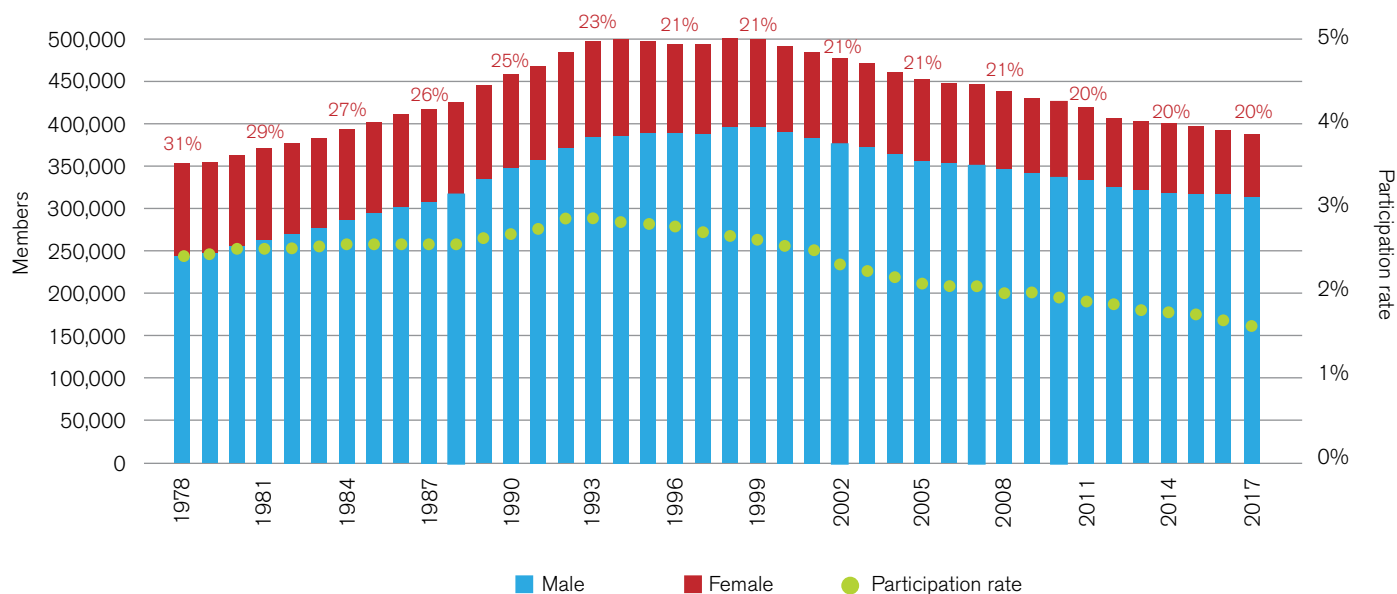
04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Historical Trends

History shows that national membership numbers peaked in 1998 at approximately 500,000. Since then, a steady decline has materialised averaging 1.3% per annum. There has also been a decline in the proportion of female members, from a high of 34% in 1970 down to 20% in 2017. Similarly, the participation rate (total members divided by total population) peaked at 2.8% in the mid 1990s before declining to its current level of 1.6% as a result of a growing population and declining membership numbers.

The long-term membership picture for males and females is illustrated in Chart 9.

Chart 9 – Historical participation



In the past five-year period a cumulative loss in total members of 3.4% has materialized, which equates to an average decline of 0.7% per year. South Australia is the only state to have experienced a nett increase in member numbers over this period.

Table 4 summarises the national results recorded for the five-year period 2013 to 2017.

Table 4

| State | 2013 | 2014 | 2015 | 2016 | 2017 | % Change | |
|----------------------|----------------|----------------|----------------|----------------|----------------|--------------|--------------|
| | | | | | | 1 Year | 5 Year |
| NSW | 153,594 | 149,855 | 149,023 | 146,174 | 144,261 | -1.3% | -1.2% |
| VIC | 111,907 | 111,026 | 110,519 | 111,485 | 109,280 | -1.8% | -0.5% |
| QLD | 65,781 | 65,282 | 65,262 | 63,754 | 63,784 | 0.0% | -0.6% |
| WA | 32,837 | 33,627 | 33,439 | 33,198 | 32,347 | -2.6% | -0.3% |
| SA | 25,683 | 25,909 | 25,822 | 26,734 | 27,652 | 3.4% | 1.5% |
| TAS | 11,310 | 11,131 | 10,729 | 10,729 | 10,311 | -3.9% | -1.8% |
| NT | 2,276 | 2,216 | 2,313 | 2,172 | 2,037 | -6.2% | -2.2% |
| Metropolitan | 157,203 | 154,466 | 153,794 | 152,353 | 150,691 | -1.1% | -0.8% |
| Regional | 228,421 | 225,404 | 222,583 | 220,310 | 216,693 | -1.5% | -1.0% |
| Social | 17,764 | 19,176 | 20,730 | 21,583 | 22,288 | 3.3% | 4.3% |
| Overall | 403,388 | 399,046 | 397,107 | 394,246 | 389,672 | -1.1% | -0.7% |
| # Course-based clubs | 1,372 | 1,363 | 1,351 | 1,347 | 1,335 | -0.9% | -0.7% |

Source: State golf associations

Note: Total course-based clubs does not include social clubs that operate within a public golf course.

04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Club Playing Members (cont)

Results by Geographical Area - Metropolitan areas

The overall national movement for metropolitan clubs in 2017 was a decline of 1.1%, with an average annual decline of 0.8% evident over the past five years. Tasmania was the only state with positive movement over this five-year period, while the metropolitan areas in Queensland, South Australia and Tasmania all experienced modest increases in member numbers in 2017.

The results for each state are represented in Table 5.

Table 5

| State | 2013 | 2014 | 2015 | 2016 | 2017 | % Change | |
|----------------|----------------|----------------|----------------|----------------|----------------|--------------|--------------|
| | | | | | | 1 Year | 5 Year |
| NSW | 65,587 | 63,515 | 63,251 | 62,072 | 61,097 | -1.6% | -1.4% |
| VIC | 44,176 | 43,782 | 44,265 | 44,201 | 43,831 | -0.8% | -0.2% |
| QLD | 15,715 | 15,113 | 14,653 | 14,737 | 14,904 | 1.1% | -1.1% |
| WA | 16,317 | 16,730 | 16,457 | 16,235 | 15,545 | -4.3% | -1.0% |
| SA | 13,238 | 13,153 | 12,990 | 12,902 | 13,074 | 1.3% | -0.2% |
| TAS | 2,170 | 2,173 | 2,178 | 2,206 | 2,240 | 1.5% | 0.6% |
| Overall | 157,203 | 154,466 | 153,794 | 152,353 | 150,691 | -1.1% | -0.8% |

Source: State golf associations

Note: This table excludes social clubs.

Results by Geographic Area – Regional Areas

The national movement reported for all regional based clubs in 2017 was a 1.5% decline, contributing to an average annual decline of 1.0% over the past five years. All states/territories experienced a decline in regional member numbers in 2017, with declines in excess of 3% evident in Western Australia, Tasmania and Northern Territory.

The results for each state/territory for regional areas are represented in Table 6.

Table 6

| State | 2013 | 2014 | 2015 | 2016 | 2017 | % Change | |
|----------------|----------------|----------------|----------------|----------------|----------------|--------------|--------------|
| | | | | | | 1 Year | 5 Year |
| NSW | 88,007 | 86,340 | 85,772 | 84,102 | 83,164 | -1.1% | -1.1% |
| VIC | 56,321 | 55,089 | 53,359 | 54,694 | 53,284 | -2.2% | -1.0% |
| QLD | 50,036 | 50,016 | 50,184 | 48,646 | 48,574 | -0.1% | -0.6% |
| WA | 11,680 | 11,737 | 11,355 | 11,370 | 10,935 | -3.8% | -1.3% |
| SA | 10,961 | 11,071 | 11,073 | 10,827 | 10,659 | -1.6% | -0.6% |
| TAS | 9,140 | 8,935 | 8,527 | 8,499 | 8,040 | -5.4% | -2.5% |
| NT | 2,276 | 2,216 | 2,313 | 2,172 | 2,037 | -6.2% | -2.2% |
| Overall | 228,421 | 225,404 | 222,583 | 220,310 | 216,693 | -1.5% | -1.0% |

Source: State golf associations

Note: This table excludes social clubs.

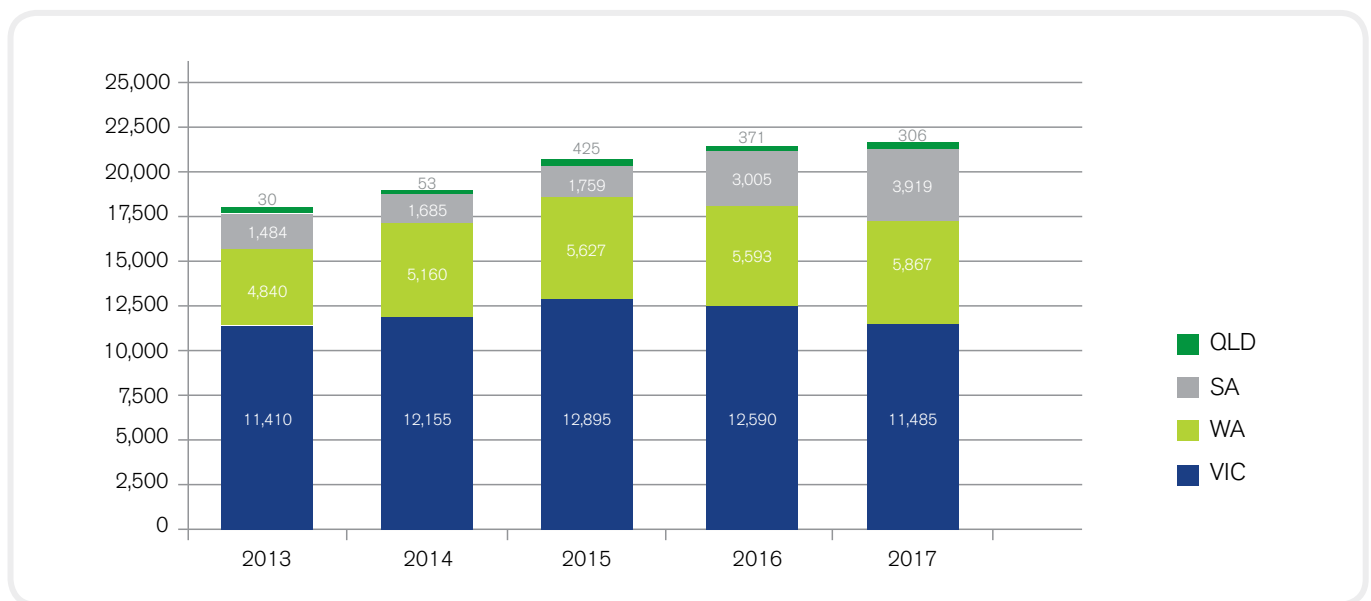
04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Club Playing Members (cont)

Social Club Members

Reported member numbers for social clubs have increased over the past from 18,018 in 2013 to 22,288 in 2017, representing an average annual increase of 4.3%. Social club members now account for 5.7% of total club members across Australia, up from 4.5% in 2013. Social club member numbers for each state are represented in Chart 10.

Chart 10 – Member numbers for social clubs



Source: State golf associations

Note: There are no affiliated social clubs in New South Wales or the Northern Territory. Tasmania has been excluded from this table as there is only one reported social club with 24 members.



04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Club Playing Members (cont)

Membership by Gender - Male

Reported male members declined by 1.1% in 2017 year, with declines of 1.1% and 1.6% respectively applicable to metropolitan and regional clubs. These results were offset by an increase in male social club members.

There was some variance evident in the results by state/territory, with Queensland and South Australia experiencing an increase in male member numbers in 2017. South Australia's male members also increased over the past five year period. These results are summarized in Table 7.

Table 7

| State | 2013 | 2014 | 2015 | 2016 | 2017 | % Change | |
|----------------|----------------|----------------|----------------|----------------|----------------|--------------|--------------|
| | | | | | | 1 Year | 5 Year |
| NSW | 122,727 | 119,669 | 119,476 | 117,747 | 115,860 | -1.6% | -1.1% |
| VIC | 87,109 | 86,778 | 86,539 | 88,409 | 86,591 | -1.8% | -0.1% |
| QLD | 53,145 | 52,473 | 52,481 | 51,219 | 51,513 | 0.6% | -0.6% |
| WA | 25,701 | 26,319 | 26,309 | 26,056 | 25,418 | -2.4% | -0.2% |
| SA | 20,577 | 20,816 | 20,726 | 21,636 | 22,485 | 3.9% | 1.8% |
| TAS | 9,280 | 9,153 | 8,865 | 8,952 | 8,532 | -4.7% | -1.7% |
| NT | 1,897 | 1,850 | 1,910 | 1,810 | 1,713 | -5.4% | -2.0% |
| Metropolitan | 126,696 | 124,779 | 124,110 | 123,489 | 122,077 | -1.1% | -0.7% |
| Regional | 179,739 | 177,008 | 175,429 | 174,516 | 171,567 | -1.6% | -0.9% |
| Social | 14,001 | 15,271 | 16,767 | 17,824 | 18,468 | 3.6% | 5.3% |
| Overall | 320,436 | 317,058 | 316,306 | 315,829 | 312,112 | -1.1% | -0.5% |

Source: State golf associations

Membership by Gender - Female

Female members declined by 1.1% in 2017. Of all states, the decline in Western Australia was greatest at 3% while Queensland experienced a slightly lower decline at 2.1%. These results are summarized in Table 8.

Table 8

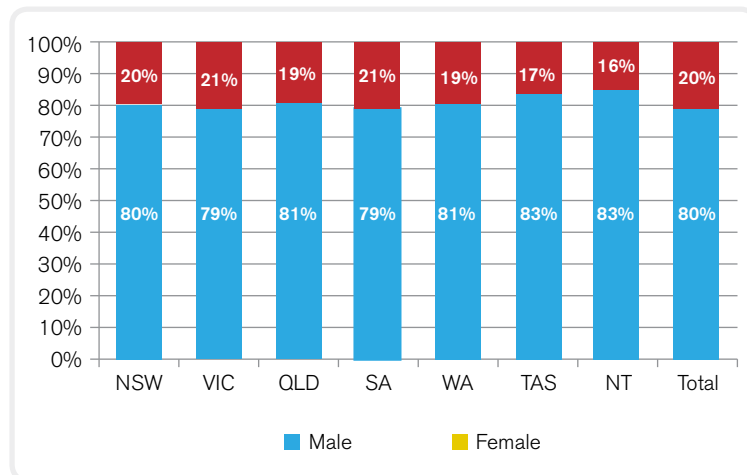
| State | 2013 | 2014 | 2015 | 2016 | 2017 | % Change | |
|-------------------|---------------|---------------|---------------|---------------|---------------|--------------|--------------|
| | | | | | | 1 Year | 5 Year |
| NSW | 30,867 | 30,186 | 29,547 | 28,427 | 28,401 | -0.1% | -1.7% |
| VIC | 24,798 | 24,248 | 23,980 | 23,076 | 22,689 | -1.6% | -1.8% |
| QLD | 12,636 | 12,809 | 12,781 | 12,535 | 12,271 | -2.1% | -0.6% |
| WA | 7,136 | 7,308 | 7,130 | 7,142 | 6,929 | -3.0% | -0.6% |
| SA | 5,106 | 5,093 | 5,096 | 5,098 | 5,167 | 1.4% | 0.2% |
| TAS | 2,030 | 1,978 | 1,864 | 1,777 | 1,779 | 0.1% | -2.6% |
| NT | 379 | 366 | 403 | 362 | 324 | -10.5% | -3.1% |
| Metropolitan | 30,507 | 29,687 | 29,684 | 28,864 | 28,614 | -0.9% | -1.3% |
| Regional | 48,682 | 48,396 | 47,154 | 45,794 | 45,126 | -1.4% | -1.5% |
| Social | 3,763 | 3,905 | 3,963 | 3,759 | 3,820 | 1.6% | 3.0% |
| Overall | 82,952 | 81,988 | 80,801 | 78,417 | 77,560 | -1.1% | -1.3% |
| % of total | 20.6% | 20.5% | 20.3% | 19.9% | 19.9% | | |

Source: State golf associations

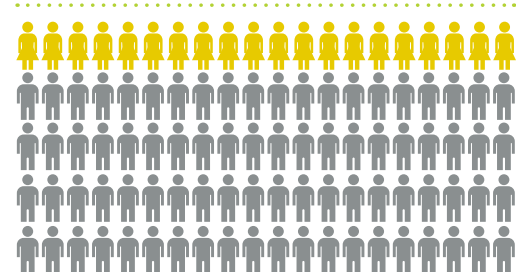
04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

With reasonably consistent declines seen in both male and female numbers, there is little change in the gender mix evident in each state. Victoria and Western Australia have the highest percentage of female members at 21% while Tasmania and the Northern Territory have the lowest proportion at 17% and 16% respectively.

Chart 4 - Gender breakdown by state/territory



20%
female share of membership base



Source: Golf Australia database

Level of Membership Movement

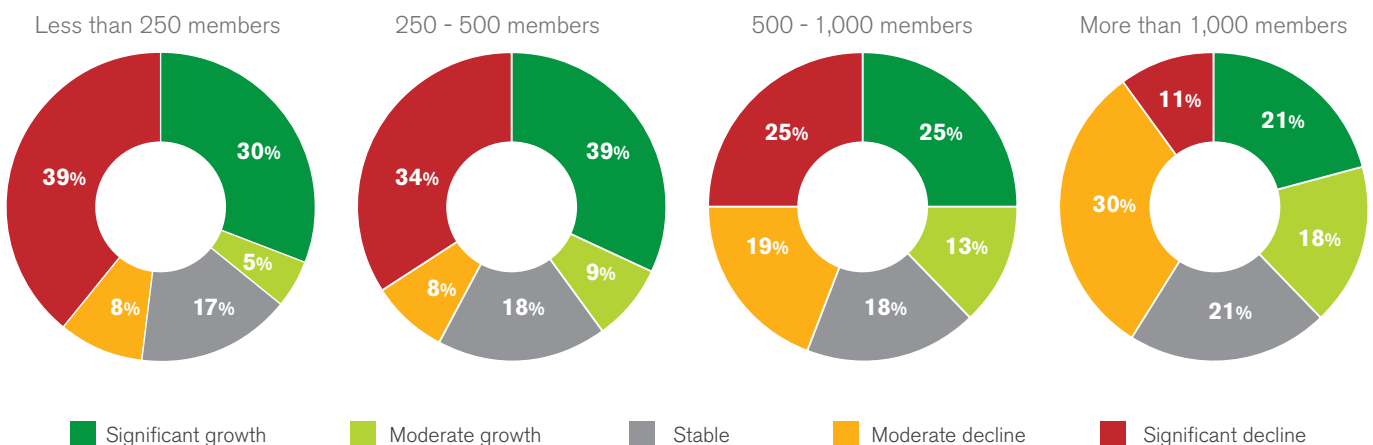
In 2017, 37% of clubs (36% in 2016) experienced a nett increase in membership numbers in excess of 2%, while 46% experienced a nett decrease (47% in 2016).

Chart 12 summarizes the proportion of clubs experiencing these positive and negative shifts in their membership base for each size category.



Stable clubs are defined as experiencing a change of less than 2% in member numbers for 2017 for clubs with up to 1,000 members, and 1% for clubs with over 1,000 members. Significant growth / decline is defined by movement of greater than 5%.

Chart 12 - Level of movement by club size



Source: State golf associations

04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

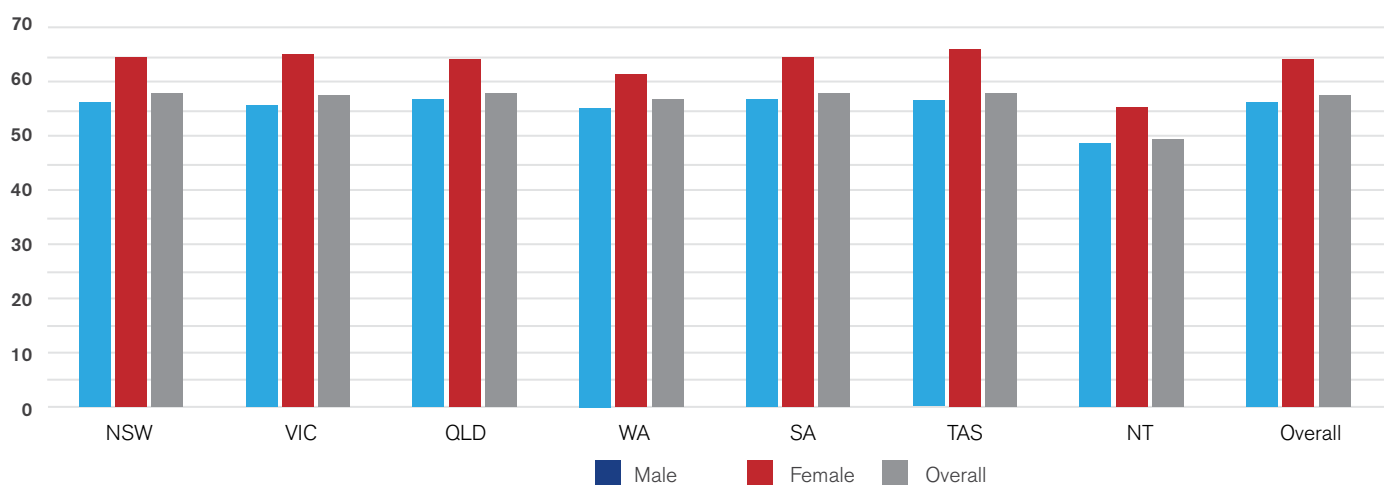
Playing Member Age Profile

Average Age

The average reported age of club members across the country is 57½ years, with little variation evident across different states/territories (with the exception of the Northern Territory). In terms of gender, the average age of male members (56.1) is eight years younger than females (64.1), with a similar age disparity being evident across all states/territories.

Full results of the age breakdown for male and female club members by state are depicted in Chart 13.

Chart 13 – Average age by state/territory



Age Distribution

The age pyramid reflects the current mix of club members. It shows a material portion of club members in older age cohorts, particularly from 60 to 75 years old, representing 38% of total members. This trend is more pronounced for female members than males, with 49% of female members aged 60 to 75 while 34% of male members are in those three cohorts. 53% of members are aged 55 years or older.



34%

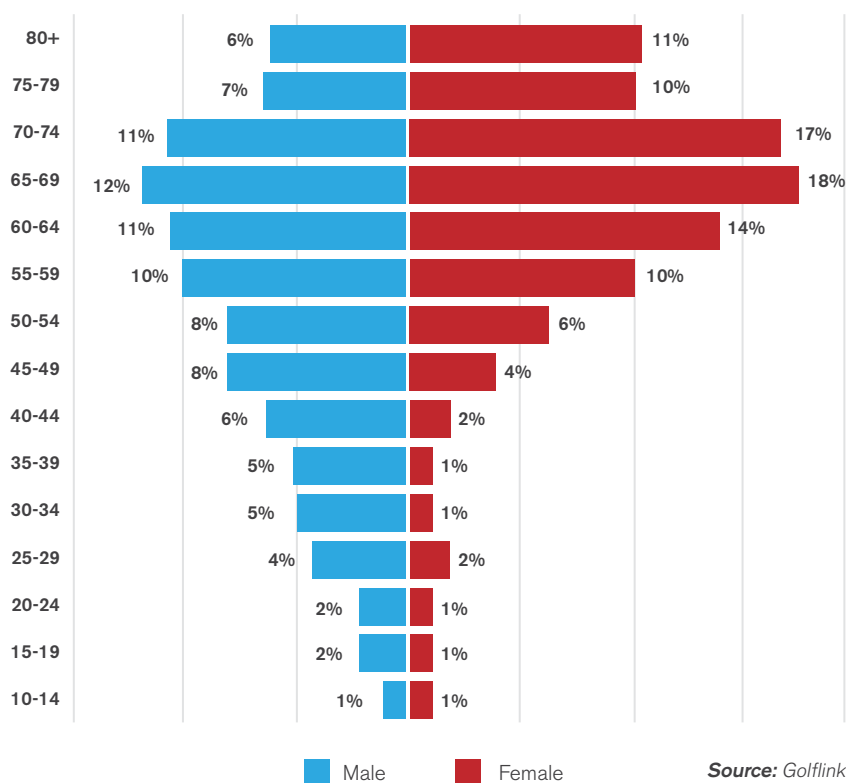
Male club members are aged 60-75



49%

Female club members are aged 60-75

Chart 14 – Age distribution by gender



Source: Golfink

04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Member Age Profile (cont)

Junior Members

Reported junior members (under the age of 18) totalled 13,524 in 2017, representing a decline of 2.0% over 2016. A larger decline in percentage terms was evident for junior females (-2.5%) than junior males (-1.9%). Queensland and South Australia both experienced nett increases of just under 10% in junior members in 2017. A summary of junior membership numbers by gender and state/territory is summarised in Table 9.

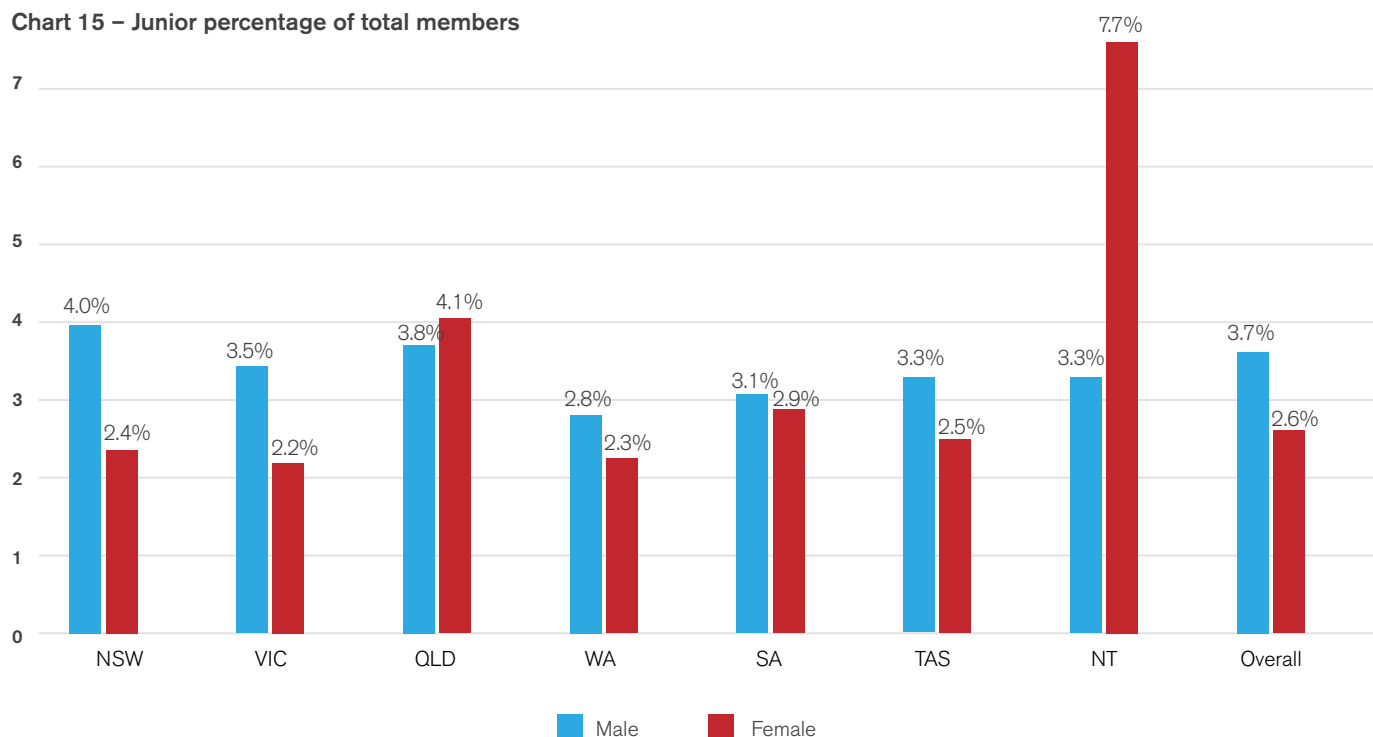
Table 9

| State | Junior Male | | | Junior Female | | | Total Juniors | | |
|----------------|---------------|---------------|--------------|---------------|--------------|--------------|---------------|---------------|--------------|
| | 2017 | 2016 | % Change | 2017 | 2016 | % Change | 2017 | 2016 | % Change |
| NSW | 4,672 | 4,919 | -5.0% | 677 | 735 | -7.9% | 5,349 | 5,654 | -5.4% |
| VIC | 3,118 | 3,297 | -5.4% | 479 | 507 | -5.5% | 3,597 | 3,804 | -5.4% |
| QLD | 1,939 | 1,714 | 13.1% | 503 | 511 | -1.6% | 2,442 | 2,225 | 9.8% |
| WA | 720 | 750 | -4.0% | 158 | 165 | -4.2% | 878 | 915 | -4.0% |
| SA | 697 | 674 | 3.4% | 151 | 112 | 34.8% | 848 | 786 | 7.9% |
| TAS | 283 | 293 | -3.4% | 45 | 35 | 28.6% | 328 | 328 | 0.0% |
| NT | 57 | 59 | -3.4% | 25 | 25 | 0.0% | 82 | 84 | -2.4% |
| Overall | 11,486 | 11,706 | -1.9% | 2,038 | 2,090 | -2.5% | 13,524 | 13,796 | -2.0% |

Source: State golf associations

As a proportion of total members, juniors represent 3.5% of total members. Male juniors represent a slightly higher proportion at 3.7% than junior females at 2.6%. The relative proportion of junior members for both genders by state/territory is represented in Chart 15.

Chart 15 – Junior percentage of total members



04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

Member Attraction & Attrition Rates

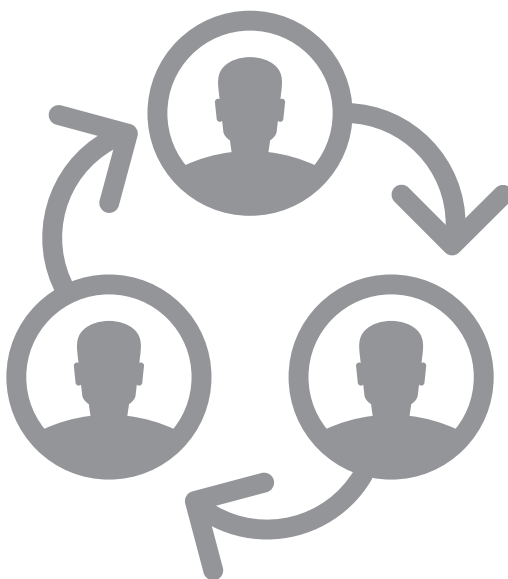
Utilising data from GolfLink, Golf Australia is able to report annual national club (excluding social clubs) attraction & attrition rates. With national new member data (defined as being those golf club members that were allocated a new GolfLink number during the year) sourced from GolfLink merged with year-end member numbers, these rates can be accurately calculated.

For 2017, a national attraction rate of 5.4% and an attrition rate of 6.8% was recorded. Table 10 summarises the relevant attraction and attrition rates for each state by region.

Table 10

| State | Metropolitan | | Regional | | Total | |
|----------------|--------------|-------------|-------------|-------------|-------------|-------------|
| | Attraction | Attrition | Attraction | Attrition | Attraction | Attrition |
| NSW | 4.7% | 6.3% | 4.9% | 5.9% | 4.8% | 6.1% |
| VIC | 4.1% | 4.8% | 5.8% | 8.2% | 5.0% | 6.7% |
| QLD | 5.3% | 4.2% | 7.0% | 7.4% | 6.6% | 6.6% |
| WA | 5.7% | 10.1% | 6.9% | 11.1% | 6.2% | 11.1% |
| SA | 4.9% | 3.6% | 5.5% | 7.0% | 5.1% | 5.1% |
| TAS | 6.4% | 4.9% | 5.7% | 11.0% | 5.8% | 9.8% |
| NT | | | | | 10.5% | 10.5% |
| Overall | 4.7% | 5.8% | 5.8% | 7.4% | 5.4% | 6.8% |

Source: GolfLink, State golf associations



2017 results show a national attrition rate of

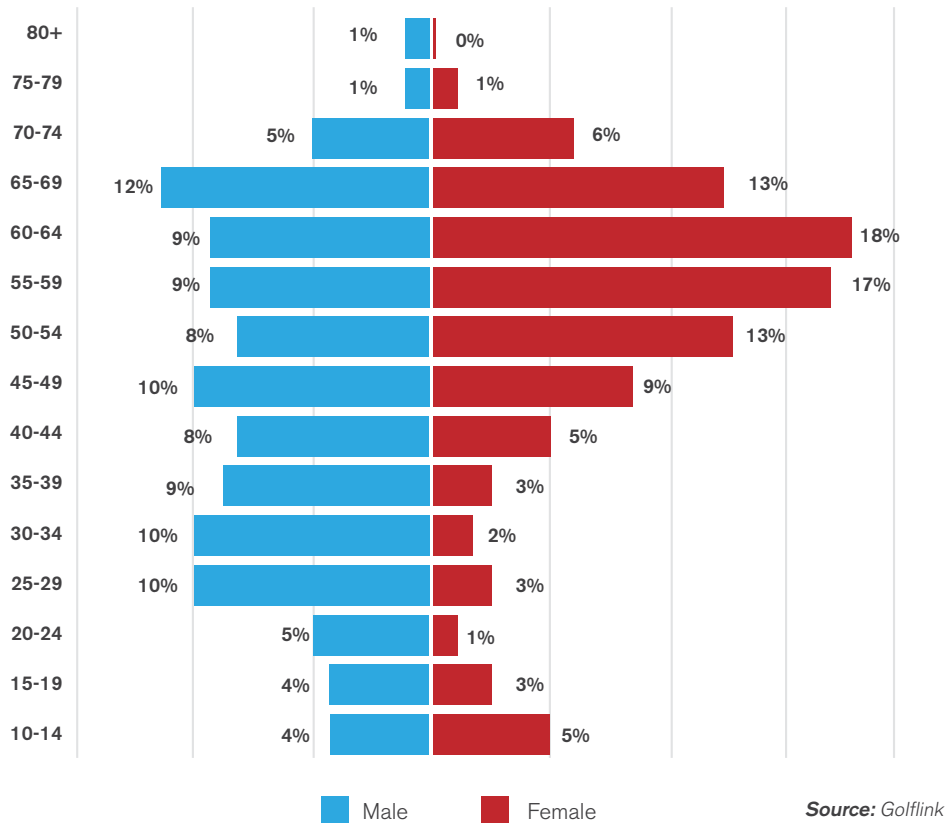
7.0%

04 NATIONAL CLUB MEMBERSHIP OVERVIEW (CONT)

New Member Profile

The age profile of new club members in 2017 is depicted in Chart 16. For males, 61% of new members were under the age of 50 compared to 31% for females, a younger age profile than that evident across is wider membership base. Approximately 55% of new female demand is 50 years of age or greater, compared to approximately 40% for new male members.

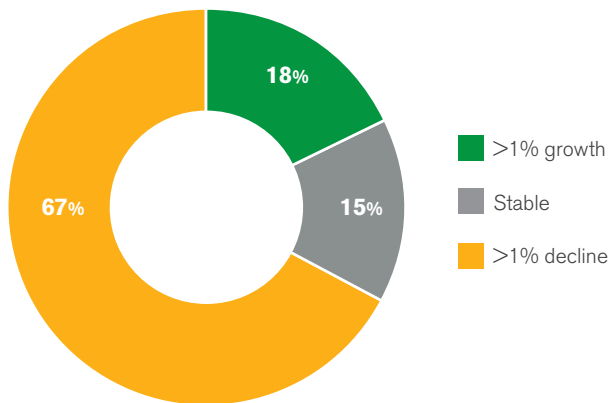
Chart 16 - New member age mix



05 STATE MEMBERSHIP OUTCOMES

Introduction

In terms of the 73 defined intrastate golf districts across the country, 13 regions (18%) experienced positive membership growth of more than 1% over the period, while 49 regions (67%) experienced a decline of more than 1%.



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



05 STATE MEMBERSHIP OUTCOMES (CONT)

NSW

Like in 2016, 6 of the 21 districts in NSW experienced a nett increase in membership numbers in 2017. The Murray district again experienced strong growth, with average growth of 8.6% over the past five years. Only one other district has experienced a growth in member numbers over the past five years, that being Central Western district. These results are depicted in Table 11.

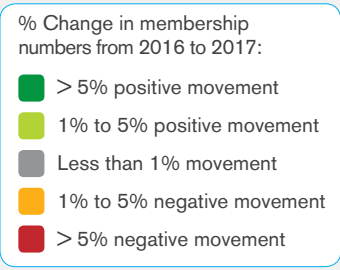
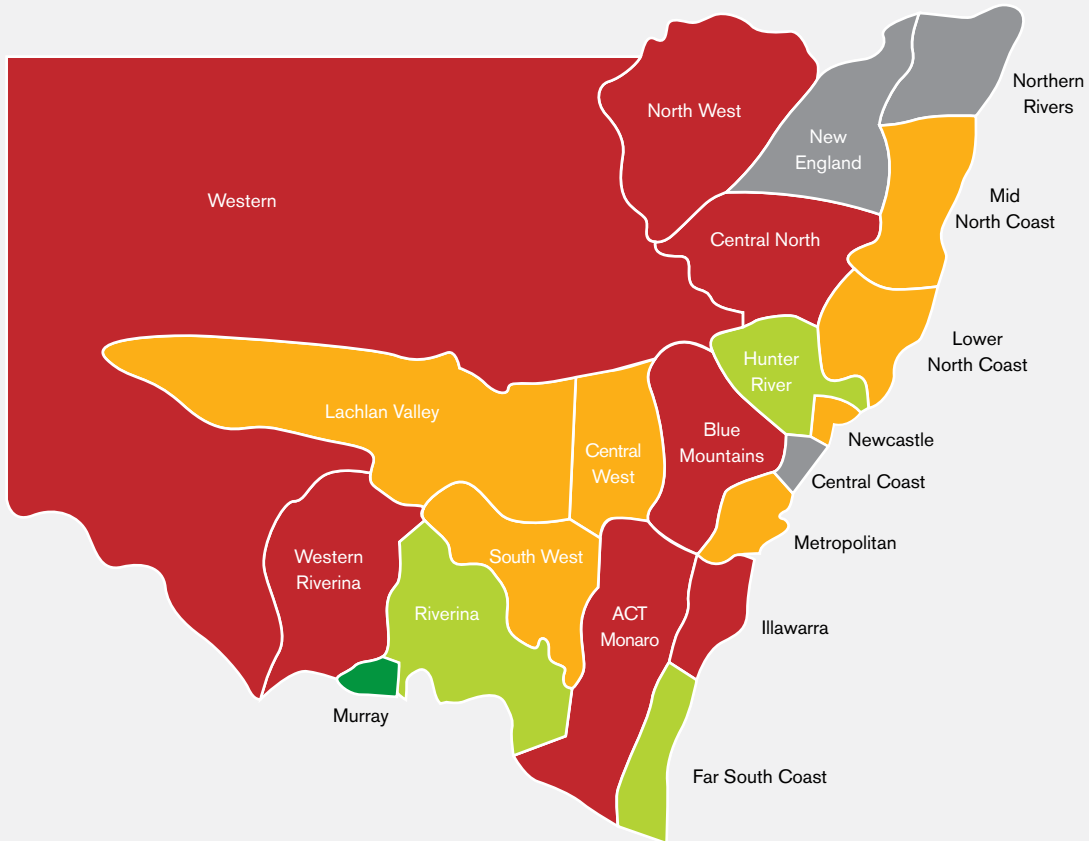
Table 11

| Region | 2013 | 2014 | 2015 | 2016 | 2017 | % Change | |
|-------------------|----------------|----------------|----------------|----------------|----------------|--------------|--------------|
| | | | | | | 1 Year | 5 Year |
| Murray | 4,661 | 4,984 | 5,619 | 6,315 | 7,027 | 11.3% | 8.6% |
| Riverina | 1,868 | 1,935 | 1,760 | 1,681 | 1,762 | 4.8% | -1.2% |
| Far South Coast | 5,769 | 5,471 | 5,321 | 5,171 | 5,403 | 4.5% | -1.3% |
| Hunter River | 4,260 | 4,216 | 4,191 | 3,848 | 3,941 | 2.4% | -1.5% |
| Central Coast | 7,196 | 7,120 | 6,942 | 6,994 | 7,048 | 0.8% | -0.4% |
| New England | 1,509 | 1,541 | 1,426 | 1,428 | 1,431 | 0.2% | -1.1% |
| Northern Rivers | 8,143 | 7,798 | 7,643 | 7,650 | 7,582 | -0.9% | -1.4% |
| Mid North Coast | 5,194 | 5,532 | 5,161 | 4,531 | 4,476 | -1.2% | -2.9% |
| Central Western | 3,480 | 3,484 | 3,628 | 3,598 | 3,542 | -1.6% | 0.4% |
| Metropolitan NSW | 65,587 | 63,515 | 63,251 | 62,072 | 61,097 | -1.6% | -1.4% |
| Lower North Coast | 5,202 | 4,728 | 4,806 | 4,710 | 4,628 | -1.7% | -2.3% |
| Newcastle | 8,940 | 8,795 | 8,885 | 8,621 | 8,460 | -1.9% | -1.1% |
| South West | 1,413 | 1,373 | 1,407 | 1,318 | 1,291 | -2.0% | -1.8% |
| Lachlan Valley | 901 | 914 | 884 | 854 | 827 | -3.2% | -1.7% |
| Illawarra | 9,847 | 9,344 | 9,175 | 8,820 | 8,372 | -5.1% | -3.2% |
| ACT-Monaro | 9,204 | 8,963 | 9,092 | 8,855 | 8,369 | -5.5% | -1.9% |
| Western Riverina | 1,882 | 1,830 | 1,765 | 1,673 | 1,569 | -6.2% | -3.6% |
| Blue Mountains | 2,673 | 2,562 | 2,332 | 2,288 | 2,136 | -6.6% | -4.4% |
| Western | 1,974 | 1,985 | 2,056 | 2,005 | 1,862 | -7.1% | -1.2% |
| Central North | 2,860 | 2,710 | 2,599 | 2,626 | 2,422 | -7.8% | -3.3% |
| North West | 1,031 | 1,055 | 1,080 | 1,116 | 1,016 | -9.0% | -0.3% |
| NSW Total | 153,594 | 149,855 | 149,023 | 146,174 | 144,261 | -1.3% | -1.2% |

Source: Golf NSW

05 STATE MEMBERSHIP OUTCOMES (CONT)

NSW - (Cont)



05 STATE MEMBERSHIP OUTCOMES (CONT)

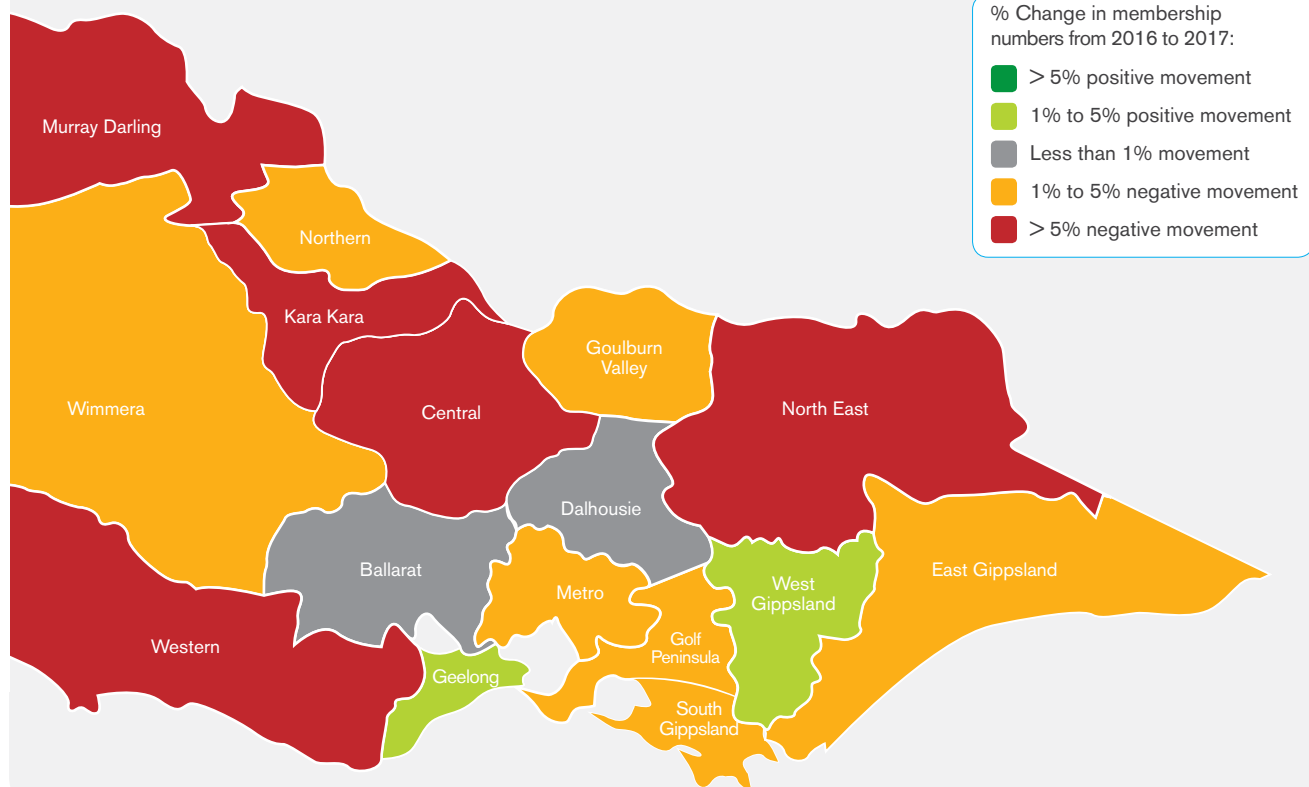
Victoria

3 of the 16 districts in Victoria experienced an increase in member numbers in 2017. Of those districts, only Dalhousie also experienced a wider positive 5-year trend. These results are depicted in Table 12.

Table 12

| Region | 2013 | 2014 | 2015 | 2016 | 2017 | % Change | |
|------------------|---------------|---------------|---------------|---------------|---------------|--------------|--------------|
| | | | | | | 1 Year | 5 Year |
| West Gippsland | 1,568 | 1,370 | 1,378 | 1,436 | 1,501 | 4.5% | -0.9% |
| Geelong | 3,735 | 3,314 | 3,488 | 3,437 | 3,569 | 3.8% | -0.9% |
| Dalhousie | 10,487 | 10,558 | 10,084 | 10,472 | 10,562 | 0.9% | 0.1% |
| Ballarat | 43,749 | 43,345 | 43,856 | 43,806 | 43,443 | -0.8% | -0.1% |
| Metropolitan VIC | 2,654 | 2,634 | 2,579 | 2,502 | 2,474 | -1.1% | -1.4% |
| Golf Peninsula | 7,263 | 7,165 | 6,734 | 7,356 | 7,263 | -1.3% | 0.0% |
| Wimmera | 3,889 | 3,859 | 3,649 | 3,466 | 3,408 | -1.7% | -2.6% |
| Goulburn Valley | 5,009 | 4,891 | 4,465 | 4,878 | 4,772 | -2.2% | -1.0% |
| East Gippsland | 2,566 | 2,473 | 2,291 | 2,474 | 2,416 | -2.3% | -1.2% |
| Northern | 3,437 | 3,480 | 3,371 | 3,398 | 3,294 | -3.1% | -0.8% |
| South Gippsland | 2,370 | 2,107 | 2,014 | 1,991 | 1,930 | -3.1% | -4.0% |
| Central | 2,922 | 2,684 | 2,817 | 2,754 | 2,615 | -5.0% | -2.2% |
| Western | 2,102 | 2,035 | 2,059 | 2,008 | 1,902 | -5.3% | -2.0% |
| North East | 2,020 | 2,135 | 2,713 | 2,514 | 2,326 | -7.5% | 2.9% |
| Murray Darling | 5,540 | 5,372 | 5,057 | 5,348 | 4,850 | -9.3% | -2.6% |
| Kara Kara | 505 | 455 | 460 | 451 | 402 | -10.9% | -4.5% |
| VIC Total | 99,816 | 97,877 | 97,015 | 98,291 | 96,727 | -1.6% | -0.6% |

Source: Golf Victoria



05 STATE MEMBERSHIP OUTCOMES (CONT)

Queensland

6 of the 14 districts in Queensland experienced a nett increase in membership numbers in 2017, with the Sunshine Coast recording the strongest result at 2.2%. The overall state results are depicted in Table 13.

Table 13

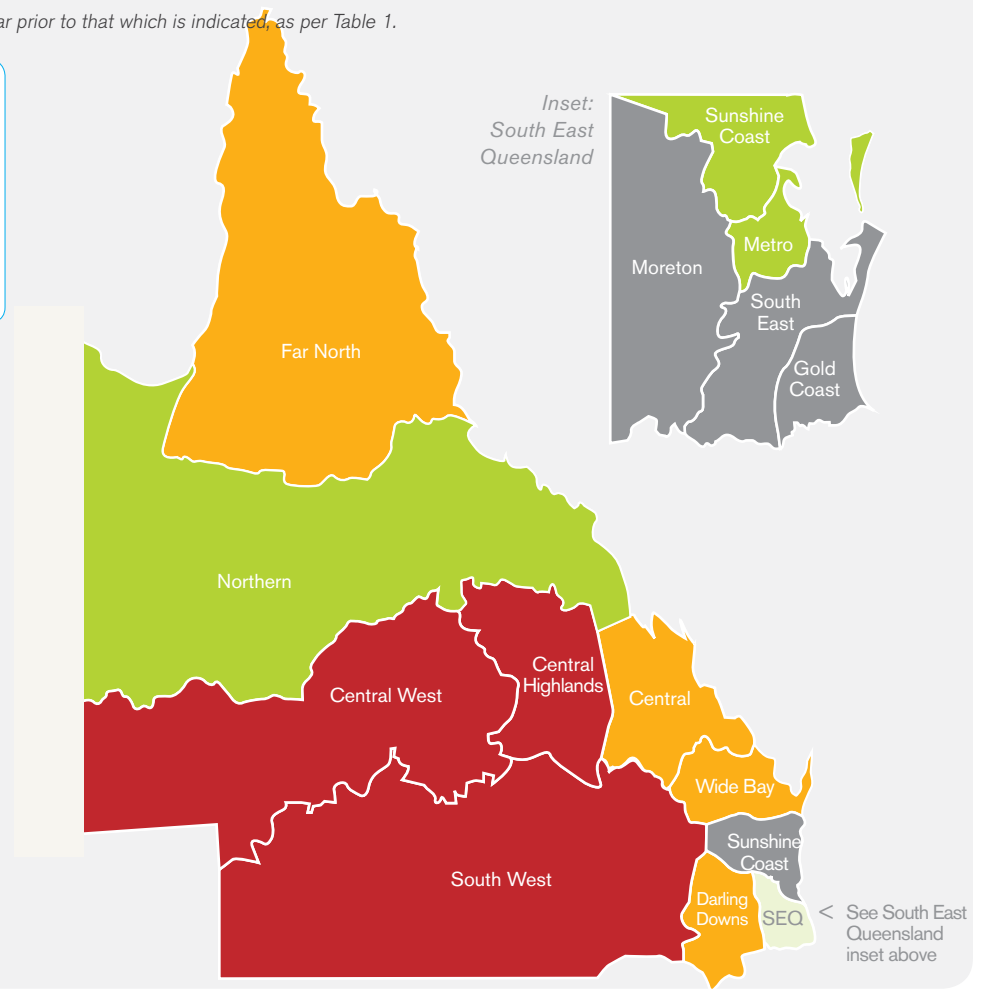
| Region | 2013 | 2014 | 2015 | 2016 | 2017 | % Change | |
|--------------------|---------------|---------------|---------------|---------------|---------------|-------------|--------------|
| | | | | | | 1 Year | 5 Year |
| Sunshine Coast | 12,593 | 12,582 | 12,587 | 12,435 | 12,710 | 2.2% | 0.2% |
| North Qld | 4,271 | 4,536 | 4,274 | 4,108 | 4,175 | 1.6% | -0.5% |
| Metropolitan QldLD | 15,715 | 15,113 | 14,653 | 14,737 | 14,904 | 1.1% | -1.1% |
| Gold Coast | 11,046 | 10,848 | 10,810 | 9,981 | 10,069 | 0.9% | -1.8% |
| South East Qld | 4,517 | 4,352 | 4,465 | 4,835 | 4,864 | 0.6% | 1.5% |
| Moreton | 2,098 | 2,087 | 2,200 | 2,011 | 2,016 | 0.2% | -0.8% |
| Darling Downs | 3,681 | 3,706 | 3,839 | 3,749 | 3,699 | -1.3% | 0.1% |
| Far North Qld | 3,237 | 3,204 | 3,032 | 2,952 | 2,898 | -1.8% | -2.2% |
| Wide Bay | 3,217 | 3,198 | 3,242 | 3,103 | 3,027 | -2.4% | -1.2% |
| Central Qld | 3,263 | 3,105 | 3,272 | 3,121 | 2,972 | -4.8% | -1.9% |
| Central Highlands | 1,014 | 1,307 | 1,382 | 1,285 | 1,180 | -8.2% | 3.1% |
| Central West | 234 | 244 | 270 | 267 | 244 | -8.6% | 0.8% |
| South West Qld | 865 | 847 | 811 | 799 | 720 | -9.9% | -3.6% |
| QLD Total | 65,751 | 65,129 | 64,837 | 63,383 | 63,478 | 0.1% | -0.7% |

Source: Golf Qld

Note: Figures relate to the calendar year prior to that which is indicated, as per Table 1.

% Change in membership numbers from 2016 to 2017:

- > 5% positive movement
- 1% to 5% positive movement
- Less than 1% movement
- 1% to 5% negative movement
- > 5% negative movement



05 STATE MEMBERSHIP OUTCOMES (CONT)

Western Australia

6 of the 10 districts in Western Australia experienced a nett increase in member numbers, with positive results in 2017 for the Great Southern and Peel districts continuing a positive trend for these districts over the past 5-year period. Pilbara is the only other district with a nett increase in member numbers over the past 5-years. These results are depicted in Table 14.

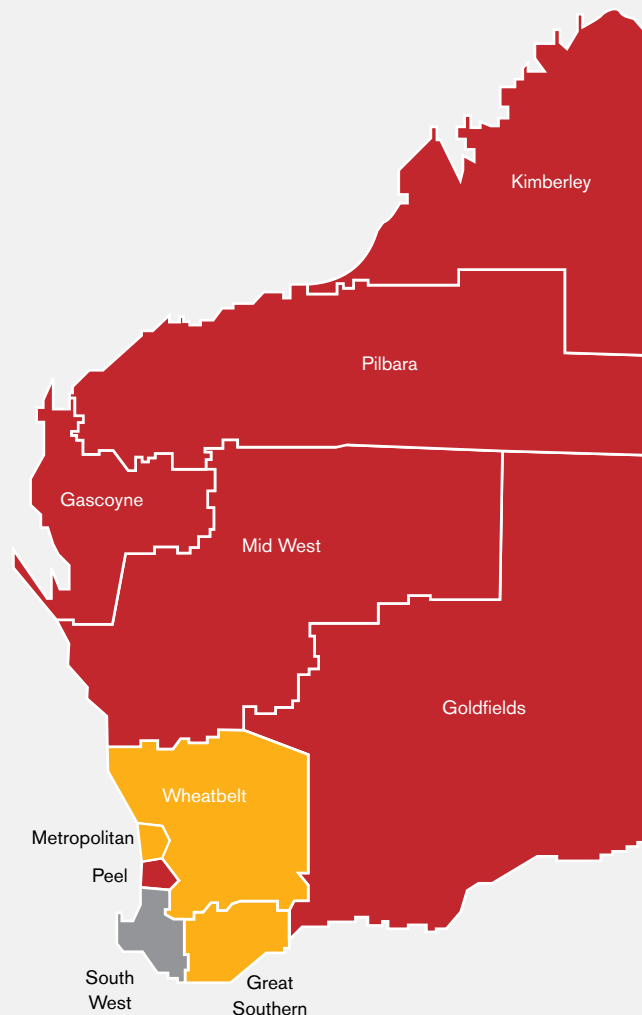
Table 14

| Region | 2013 | 2014 | 2015 | 2016 | 2017 | % Change | |
|-----------------|---------------|---------------|---------------|---------------|---------------|--------------|--------------|
| | | | | | | 1 Year | 5 Year |
| South-West | 4,108 | 4,199 | 3,943 | 4,029 | 3,997 | -0.8% | -0.5% |
| Great Southern | 1,263 | 1,305 | 1,301 | 1,394 | 1,380 | -1.0% | 1.8% |
| Wheat | 2,295 | 2,299 | 2,399 | 2,241 | 2,193 | -2.1% | -0.9% |
| Metropolitan WA | 16,317 | 16,730 | 16,457 | 16,235 | 15,545 | -4.3% | -1.0% |
| Kimberley | 468 | 448 | 451 | 410 | 380 | -7.3% | -4.1% |
| Pilbara | 495 | 486 | 422 | 423 | 391 | -7.6% | -4.6% |
| Mid West | 1,169 | 1,164 | 1,017 | 1,084 | 999 | -7.8% | -3.1% |
| Goldfields | 1,072 | 1,011 | 975 | 892 | 793 | -11.1% | -5.9% |
| Peel | 681 | 694 | 717 | 765 | 685 | -10.5% | 0.1% |
| Gascoyne | 129 | 131 | 130 | 132 | 117 | -11.4% | -1.9% |
| WA Total | 27,997 | 28,467 | 27,812 | 27,605 | 26,480 | -4.1% | -1.1% |

Source: Golf WA

% Change in membership numbers from 2016 to 2017:

- > 5% positive movement
- 1% to 5% positive movement
- Less than 1% movement
- 1% to 5% negative movement
- > 5% negative movement



05 STATE MEMBERSHIP OUTCOMES (CONT)

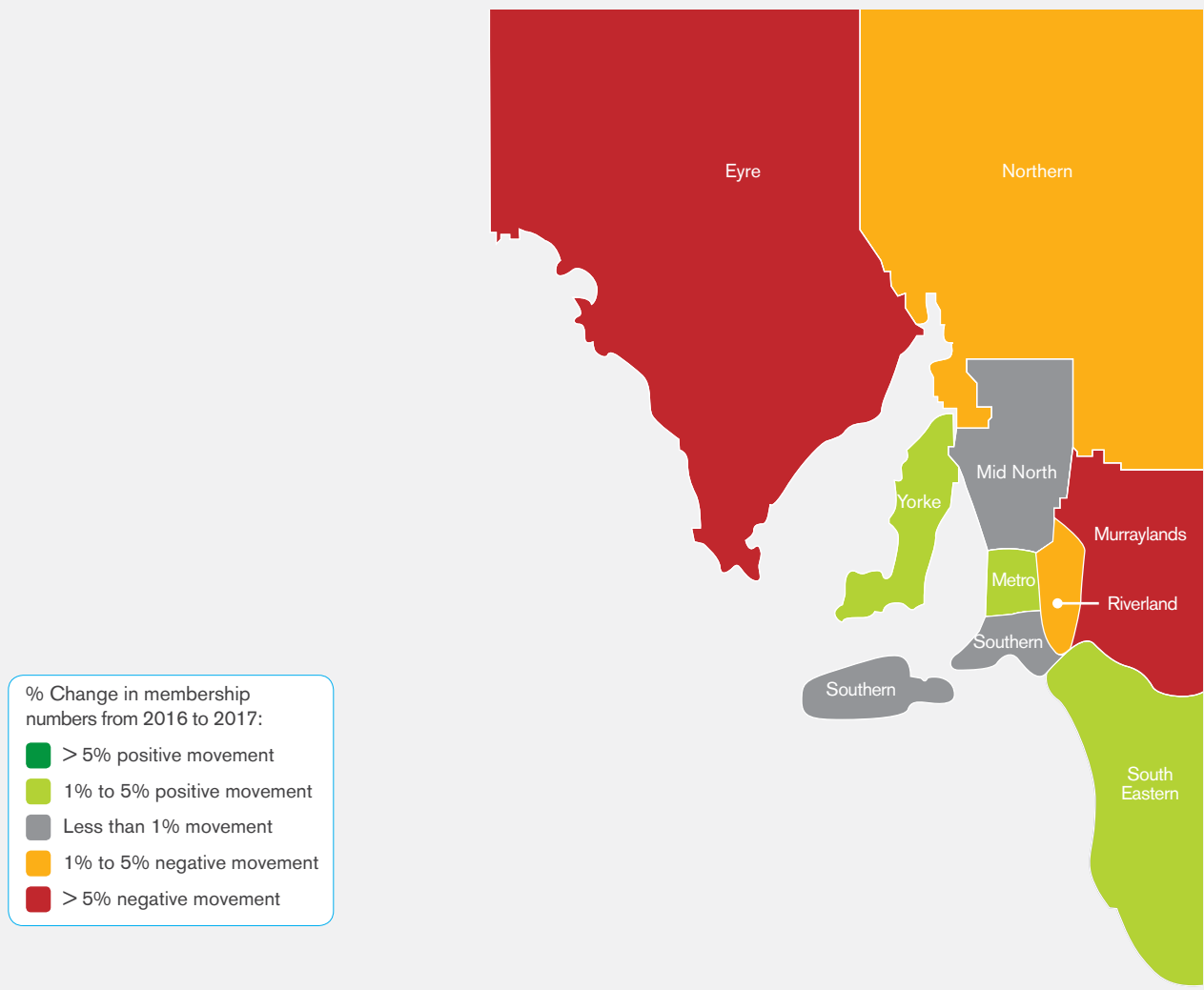
South Australia

Like in 2016, three of the nine districts experienced a nett increase in membership numbers in 2017, including the metropolitan market. The district of Yorke has also experienced a modest increase in member numbers over the past five years. These results are depicted in Table 15.

Table 15

| Region | 2013 | 2014 | 2015 | 2016 | 2017 | % Change | |
|-----------------|---------------|---------------|---------------|---------------|---------------|-------------|--------------|
| | | | | | | 1 Year | 5 Year |
| Yorke | 923 | 938 | 982 | 972 | 1,019 | 4.8% | 2.0% |
| Metropolitan SA | 13,238 | 13,153 | 12,990 | 12,902 | 13,074 | 1.3% | -0.2% |
| South Eastern | 1,758 | 1,667 | 1,630 | 1,650 | 1,671 | 1.3% | -1.0% |
| Mid North | 1,423 | 1,404 | 1,384 | 1,421 | 1,420 | -0.1% | 0.0% |
| Southern | 3,408 | 3,534 | 3,607 | 3,449 | 3,427 | -0.6% | 0.1% |
| Riverland | 562 | 631 | 590 | 528 | 516 | -2.3% | -1.7% |
| Northern SA | 994 | 990 | 952 | 960 | 916 | -4.6% | -1.6% |
| Murraylands | 717 | 728 | 702 | 665 | 609 | -8.4% | -3.2% |
| Eyre | 1,176 | 1,179 | 1,226 | 1,182 | 1,081 | -8.5% | -1.7% |
| SA Total | 24,199 | 24,224 | 24,063 | 23,729 | 23,733 | 0.0% | -0.4% |

Source: Golf SA



05 STATE MEMBERSHIP OUTCOMES (CONT)

Tasmania

Only the Southern Metropolitan region in Tasmania experienced an increase in member numbers in 2017, with an increase of 1.5% evident. While numbers in this region have also increased over the past five years, negative outcomes are evident in the other three regions both in 2017 and over the past five years. These results are depicted in Table 16.

Table 16

| Region | 2013 | 2014 | 2015 | 2016 | 2017 | % Change | |
|-----------------------|---------------|---------------|---------------|---------------|---------------|--------------|--------------|
| | | | | | | 1 Year | 5 Year |
| Southern Metropolitan | 2,170 | 2,173 | 2,178 | 2,206 | 2,240 | 1.5% | 0.6% |
| Southern Country | 3,099 | 3,029 | 2,909 | 2,865 | 2,744 | -4.2% | -2.4% |
| North | 3,510 | 3,468 | 3,270 | 3,316 | 3,141 | -5.3% | -2.2% |
| North West | 2,531 | 2,438 | 2,348 | 2,318 | 2,155 | -7.0% | -3.2% |
| TAS Total | 11,310 | 11,108 | 10,705 | 10,705 | 10,280 | -4.0% | -1.9% |

Source: Golf Australia

% Change in membership numbers from 2016 to 2017:

- > 5% positive movement
- 1% to 5% positive movement
- Less than 1% movement
- 1% to 5% negative movement
- > 5% negative movement

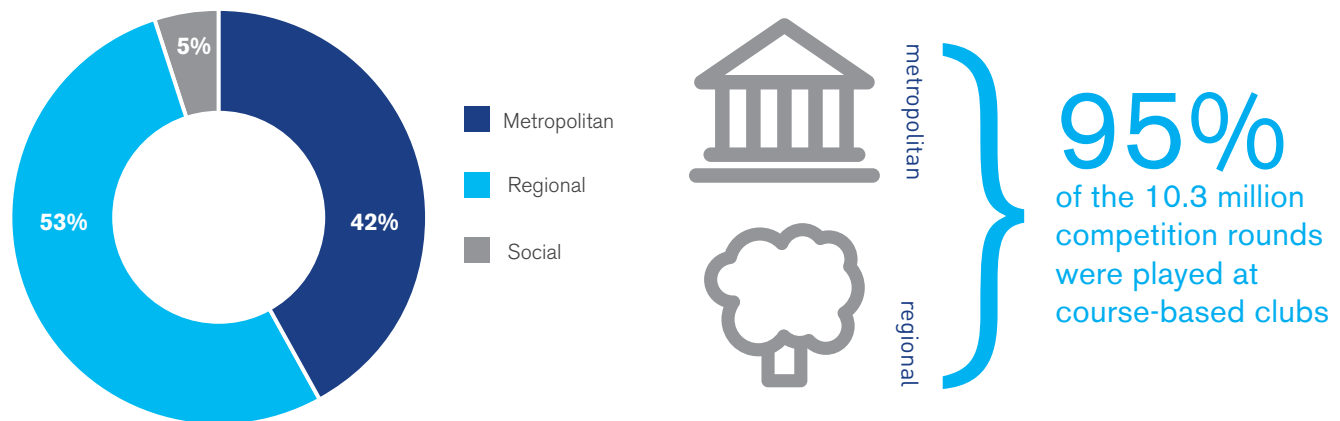


06 CLUB GOLF COMPETITION ROUNDS

National Results

For the twelve month period to end December 2017, 10.3 million competition rounds were recorded by GolfLink across their database of golf clubs. 95% of those rounds were played at course-based clubs, while the remaining 5% relate to various social clubs.

Chart 18 – Rounds breakdown by club designation



Results by State

Mixed outcomes were reported on a state basis, with growth evident in Victoria, Western Australia, South Australia and Tasmania. Rounds at metropolitan clubs increased slightly in 2017, and slightly declined for regional clubs.

Five year data from GolfLink is summarised in Table 17.

Table 17

| State | 2013 | 2014 | 2015 | 2016 | 2017 | % Change | |
|---------------------------|------------------|-------------------|-------------------|-------------------|-------------------|----------|--------|
| | | | | | | 1 Year | 5 Year |
| NSW | 3,800,216 | 3,846,549 | 3,708,109 | 3,756,462 | 3,745,605 | -0.3% | -0.3% |
| VIC | 2,409,927 | 2,429,491 | 2,464,184 | 2,418,453 | 2,459,859 | 1.7% | 0.4% |
| QLD | 1,627,151 | 1,748,120 | 1,720,256 | 1,809,631 | 1,753,540 | -3.1% | 1.5% |
| WA | 782,868 | 799,758 | 820,094 | 812,806 | 814,684 | 0.2% | 0.8% |
| SA | 719,968 | 703,273 | 711,909 | 697,268 | 705,250 | 1.1% | -0.4% |
| TAS | 260,886 | 267,752 | 271,641 | 255,926 | 269,272 | 5.2% | 0.6% |
| NT | 44,939 | 44,773 | 42,570 | 42,438 | 40,064 | -5.6% | -2.3% |
| Metropolitan | 4,237,101 | 4,298,950 | 4,265,156 | 4,291,248 | 4,293,685 | 0.1% | 0.3% |
| Regional | 5,408,854 | 5,540,766 | 5,473,607 | 5,501,736 | 5,494,589 | -0.1% | 0.3% |
| Course-based clubs | 9,645,955 | 9,839,716 | 9,738,763 | 9,792,984 | 9,788,274 | 0.0% | 0.3% |
| Social | 303,036 | 466,502 | 501,203 | 513,484 | 533,381 | 3.9% | 12.0% |
| Overall | 9,948,991 | 10,306,218 | 10,239,966 | 10,306,468 | 10,321,655 | 0.1% | 0.7% |

Source: GolfLink, Golf Australia

NB. Social clubs reporting rounds with GolfLink do not align with those reporting membership numbers that appear in earlier sections of this report.

Results by State (cont)

Tasmania experienced the largest increase in rounds played for the calendar year, recording 5% growth over 2016, with rounds returning to a similar level to 2015. For most states, stronger results through the winter months offset poor 1st quarter outcomes. Rounds played by state for each quarter of 2017 and the movement recorded over the corresponding period in 2016 are summarised in Table 18.

Table 18

| State | Jan-Mar | Apr-Jun | Jul-Sep | Oct-Dec | Total |
|---------------------------|------------------|------------------|------------------|------------------|-------------------|
| NSW | 908,110 | 982,713 | 1,036,488 | 1,006,374 | 3,933,685 |
| VIC | 701,918 | 665,265 | 561,657 | 649,136 | 2,577,976 |
| QLD | 419,925 | 464,614 | 513,261 | 395,761 | 1,793,561 |
| WA | 228,572 | 258,117 | 233,682 | 233,163 | 953,534 |
| SA | 191,125 | 197,816 | 175,733 | 183,127 | 747,801 |
| TAS | 75,862 | 67,916 | 56,853 | 74,403 | 275,034 |
| NT | 7,824 | 11,309 | 12,558 | 8,373 | 40,064 |
| Total | 2,533,336 | 2,647,750 | 2,590,232 | 2,550,337 | 10,321,655 |
| % change from 2016 | | | | | |
| NSW | -11% | 0% | 15% | -2% | 0% |
| VIC | -4% | 4% | 3% | 3% | 1% |
| QLD | -7% | -1% | 7% | -11% | -3% |
| WA | -1% | 4% | -2% | 1% | 1% |
| SA | -6% | 5% | 7% | 1% | 1% |
| TAS | -4% | 8% | 7% | 12% | 5% |
| NT | -19% | -5% | 6% | -7% | -6% |
| Total | -7% | 2% | 8% | -2% | 0% |

Source: GolfLink, Golf Australia



07 PROGRAM PARTICIPANTS, EVENTS, DELIVERERS & OFFICIALS

Table 19 summarises a number of key participation areas that are measured by Golf Australia as a requirement to the report to the Australian Sports Commission.

Table 19

| CATEGORY | 2012/13 ACTUAL | 2013/14 ACTUAL | 2014/15 ACTUAL | 2015/16 ACTUAL | 2016/17 ACTUAL |
|---|-------------------|-------------------|-------------------|-------------------|-------------------|
| Program Participants | | | | | |
| MyGolf National Junior Program | 4,846 | 939 | 3,480 | 6,254 | 9,674 |
| Other Non-MyGolf Junior Programs | 8,974 | 12,577 | 10,586 | 11,696 | 11,299 |
| Crown Lager Social/GA Social Golf Club | 2,478 | 2,898 | | | |
| Qantas Golf Club | | | 35,486 | 121,080 | 125,740 |
| Other Casual Golf Programs | 7,550 | 7,027 | 3,268 | 6,595 | 4,531 |
| Indigenous | 2,513 | 1,458 | 1,687 | 1,888 | 1,728 |
| Disability | 1,549 | 2,224 | 2,645 | 5,956 | 8,195 |
| Female | 15,005 | 12,536 | 7,363 | 6,380 | 11,535 |
| Seniors | 13,213 | 14,063 | 4,068 | 3,595 | 4,327 |
| New Formats | | | 6,342 | 29,032 | 40,540 |
| Swing Fit | | | | 430 | 640 |
| Other programs | 1,004 | 2,576 | 1,305 | 1,370 | 2,966 |
| | 57,132 | 56,298 | 76,230 | 194,276 | 221,175 |
| Event Entries (Men/Women/Mixed/Jnrs) | | | | | |
| Member Association State & Territory Events | 56,575 | 50,894 | 56,798 | 57,573 | 50,504 |
| Junior Foundation Events | 7,447 | 7,696 | 9,232 | 8,215 | 9,516 |
| Golf Australia National Events | 1,724 | 1,665 | 1,545 | 1,631 | 1,653 |
| PGA Events | 98,422 | 93,829 | 96,656 | 82,944 | 84,515 |
| ALPG Events | 791 | 959 | 952 | 1,123 | 969 |
| | 164,959 | 155,043 | 165,183 | 151,486 | 147,157 |
| School Delivered Programs Participants | | | | | |
| MyGolf Schools 1 (primary) program | 45,936 | 56,499 | 52,404 | 47,819 | 46,956 |
| MyGolf Schools 1 (primary) "tasters" | 47,556 | 36,781 | 26,631 | 28,202 | 14,980 |
| AASC/Sporting Schools Golf Program | 13,820 | 16,035 | 8,292 | 18,124 | 21,409 |
| MyGolf Schools 2 (secondary) program | 24,854 | 22,748 | 19,619 | 16,049 | 21,060 |
| MyGolf Schools 2 (secondary) "tasters" | 2,312 | 1,518 | 518 | 595 | 220 |
| Other Non-MyGolf School Programs | 5,687 | 7,991 | 7,053 | 7,214 | 6,293 |
| | 140,165 | 141,572 | 114,517 | 118,003 | 110,918 |
| School Managed Competitions Participants | | | | | |
| SSA 12 Yrs & Under Championship | 2,401 | 3,698 | 4,623 | 3,668 | 3,985 |
| SSA 19 Yrs & Under Championship | 1,014 | 1,639 | 1,503 | 1,724 | 1,506 |
| | 3,415 | 5,337 | 6,126 | 5,392 | 5,491 |
| Program Deliverers & Officials | | | | | |
| Development Personnel | 33 | 34 | 34 | 40 | 37 |
| Community Golf Instructors | 1,383 | 1,728 | 1,699 | 1,496 | 1,167 |
| AASC/Sporting Schools Golf Coaches | 678 | 502 | 419 | 182 | 374 |
| PGA Coaches | 1,615 | 1,562 | 1,652 | 1,662 | 1,648 |
| ALPG Coaches | 57 | 57 | 72 | 84 | 90 |
| Rules Officials | 4,886 | 4,796 | 4,563 | 4,736 | 4,769 |
| Course Raters | 418 | 248 | 157 | 96 | 20 |
| | 9,070 | 8,927 | 8,596 | 8,296 | 8,105 |

NB: The data may include the counting of a participant each time they engage in the activity. Participants may be recorded across multiple categories. Development personnel are those employed by Golf Australia, Member Associations and Junior Foundations.

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