



GolfAustralia

GOLF CLUB PARTICIPATION REPORT

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20/21



About the Author

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

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

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



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Hannah Green - 2019 ISPS Handa Women's Australian Open at Royal Adelaide Golf Club
Photo: Royal Adelaide Golf Club / David Brand

01 Foreword

Australian golf is thriving at grassroots level. The 2020/21 Golf Club Participation Report confirms it.

Anecdotally, everyone in Australian golf has seen, heard and witnessed the cramming of thousands of players of all ages and demographics and both sexes into golf courses, driving range, putt-putt centres and simulators over the past two years.

The participation report, showing a 6.3 percent lift in club membership, therefore should not surprise anyone.

But they are great numbers put in the context of recent history in the sport and the southbound direction that other sports have taken in the Covid-19 pandemic.

For almost 20 years from 2000, participation numbers in Australia declined by an average of about one percent per annum. In 2019/20 we managed a slight uptick, which at least arrested the downward momentum.

But the increase of six percent in 2020/21 is monumentally encouraging for the game, just as the AusPlay figures, calculated by the Federal Government and showing that

250,000 new people came to golf over the year (a 32 percent increase on 2019/20), were exciting for the sport.

Now, some more hard work! Retention becomes our keyword as we embark on what ought to be a strong period of growth for golf. So many new people have come to the game in recent times, with limitations on travel and restrictions on gatherings due to the pandemic. They need to be embraced, so they remain in the game.

What is also worth remembering is that this participation report – traditionally a gauge of membership numbers – will look somewhat different in the future. As part of the soon-to-be-released Australian Golf Strategy, the industry has recognised that members represent only a sliver of the golfing population as such.

The driving range enthusiast, the once-a-year public course hacker, the simulator lover, the infants at the putt-putt course ... these are all our people. It is the notion that all golf is golf.

We are one big family, hooked by the obsession that is golf. It's one 'bug' that we are happy to catch.



James Sutherland
CEO, Golf Australia

02 Key Findings

Golf Australia is pleased to present to you the 2020/21 Golf Club Participation Report. The key findings are outlined below.

Broader sport and golf participation

Golf recorded an annual participation increase of 21% over 2019/20 with an estimated additional 210,000 people playing the game in the last 12 month period. Total growth experienced over participation levels recorded in 2018/19 exceeds 285,000 people, a 30% increase over this period.

In 2020/21, male participation increased to 9.3% of the population (over 15), with female participation steady at 2.1%, an overall average rate of 5.7%. Approximately two thirds of the total market are participating in the sport on a social basis.

Club membership

1,651 clubs reported membership numbers for 2020/21, inclusive of 345 social clubs (21% of the market).

National membership numbers across Australia for the year are reported as 409,970. This result represents a 6.4% increase (24,485 members) when measured against total 2019/20 results. Driven by the societal impacts and outcomes resulting from the Covid-19 pandemic, this result is the largest annual increase reported since national data collection began in 1970.

Positive member movement was evident in all key market segments. Both member clubs and social clubs enjoyed growth approximating 6%, this in turn driven by growth in male numbers of over 7%. Junior numbers also enjoyed material growth, increasing by 15% over the prior year.

The overall national movement in 2020/21 for member clubs (the aggregate of metropolitan and regional clubs) was an increase of 6.4%. All states except NT enjoyed growth well in advance of recent trends. Despite long periods of course closures due to

lockdown measures, Victoria recorded the largest growth of 8.9%.

All markets except the NT recorded increases of more than 5%, with a remarkable 11% recorded in Victoria. Female member demand was not as strong as male demand, growing by 1.9%.

The resultant gender mix reported for 2020/21, impacted by strong male growth, sees female share of membership demand fall by 1% to 19%.

Reported junior members (under the age of 18) totalled 15,304, which represents an increase of 16% over 2019/20. Proportionately, junior growth was more evident in regional markets (+20%) and junior boys (+17%).

Overall junior members represent 3.7% of the total member count across the country.

The national new club member attraction rate was 13%, with an attrition rate of 10%. Attrition rates are slightly higher at regional clubs and smaller clubs.

The average reported age of club members across Australia is 56.9 years. The average age of male members was 55.3 years (54.7 in 2019/20) with female members averaging 16% higher at 64.3 years (63.9 in 2019/20).

The new member age profile skews to the younger age cohorts, with 34% of new members aged between 15 and 34 years, compared to 25% for the same age range in 2019/20.

There were 11.769 million competition rounds played in 2020/21, representing a 12.1% increase over 2019/20.

Average annual rounds played on a per member basis (those playing one round or more) increased marginally in 2020/21 to 31.5 rounds per year.

876 clubs (67%) recorded 9-hole rounds in 2020/21, up by 38 clubs from the previous period.

The 65 yr + age cohort played the highest proportion of 9-hole rounds, reflecting 6% of overall rounds played.

TOTAL GOLF PARTICIPANTS

(15+ years old)

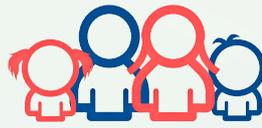
1,204,000

21%
1 year trend

5.7%
% adult pop.

OVERALL PARTICIPATION RATE

1.7%



Adults **1.8%**

Juniors **0.6%**

TOTAL CLUB MEMBERS

(incl. Social Clubs)

409,970

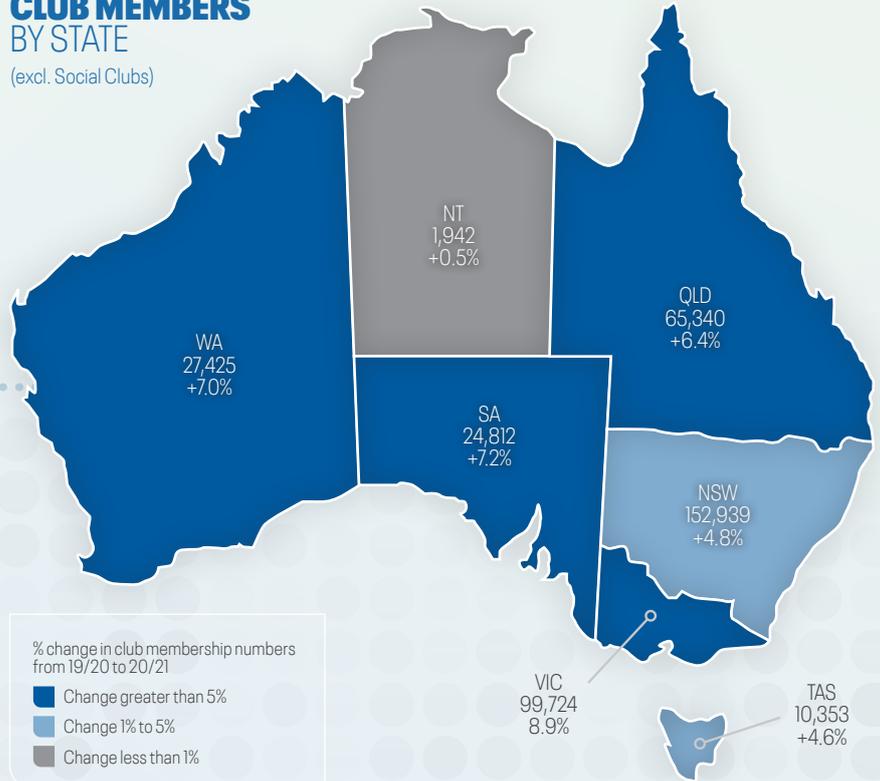
6.4% 1-year trend

24,485 New members

CLUB MEMBERS BY STATE

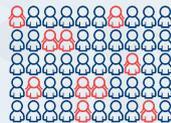
(excl. Social Clubs)

(excl. Social Clubs)



56.9

AVERAGE AGE reported for club members



19%

FEMALE MEMBERS make up 19% of club membership numbers

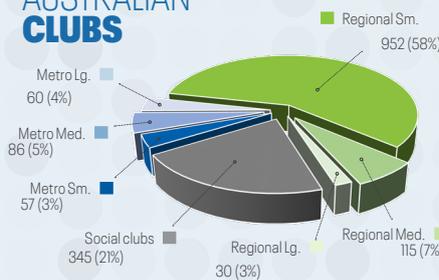
JUNIOR MEMBERSHIP

15,304 junior members

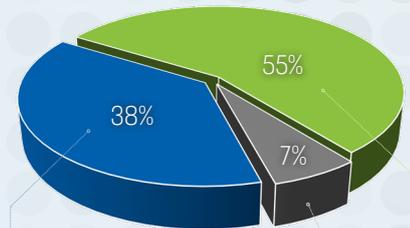
+16% 2020/21 vs 2019/20

3.7% % all members

AUSTRALIAN CLUBS



AUSTRALIAN CLUB MEMBERS



876 clubs with 9-hole rounds

9-hole rounds **517,492**

+20% 2020/21 vs 2019/20

4.4% total rounds played

COMPETITION ROUNDS PLAYED

11.769 million



+12.4% 2020/21 vs 2019/20

31.5 rounds per player (**28.1** in 2019/20)

+5.7% **26,716** Social club members 345 clubs

155,526 Metropolitan club members 203 clubs **+5.3%**

+7.6% **227,009** Regional club members 1,097 clubs



SA MyGolf Girls' Golf Development Camp - West Beach Mini Golf
Photo: Golf Australia (SA) / David Brand

2021

03 Report Background

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

This 8th edition of the Golf Club Participation Report is a key component in Golf Australia's industry formation communication strategy.

This report remains an invaluable reference as clubs and other industry stakeholders seek to understand current trends and in turn develop evidenced-based strategies that aim to enhance demand and increase the game's and club long term sustainability.

04

Broader Sport & Golf Participation Trends

2021

AusPlay data

Introduction

Results from the latest (2020/21) Ausplay National Participation Survey have recently been released by Sport Australia.

The release is the 12th in the series since the survey was resurrected and is the second (Dec 2020) to cover participation during the Covid-19 period.

The annual data presented is a valuable reference point for understanding overall participation levels in golf and those in other sports.

All sports participation

Participation increases were recorded in all singular based activities/sports for 2020/21. Team based sports have generally been more impacted by Covid-19, with lower growth (AFL, 6%) or declines (netball, -3%) recorded over 2018/19, the last full period prior to the start of the pandemic in March 2020.

Fitness / Wellness related activities (pilates and yoga) continue on a significant upward trajectory with growth of 33% over the period prior to the pandemic with a 63% increase recorded since 2016/17.

The more singular sports of golf (+31%), surfing (+42%), cycling (+35%), tennis (+34%) and basketball (+31%) have all recorded material increases above pre-pandemic levels of activity.

Table 1: All Sports Participation

Activity	2016/17	2017/18	2018/19	2019/20	2020/21	% change 20/21 v 18/19
	Estimate (000s)					
Walking (Recreational)	8,655.6	8,895.3	8,968.1	9,535.6	9,856.5	10%
Bush walking	1,252.2	1,078.1	1,167.2	1,539.9	2,077.4	78%
Fitness/Gym	6,618.2	6,960.6	7,366.7	7,789.2	7,944.7	8%
Athletics (incl. jogging/ running)	3,026.3	3,075.7	3,292.3	3,568.9	4,389.3	33%
Sub total	19,552.4	20,009.7	20,794.4	22,433.5	24,268.0	17%
Swimming	3,009.6	2,952.0	3,139.7	3,476.5	3,703.1	18%
Cycling	2,284.0	2,319.1	2,368.2	2,600.4	3,187.6	35%
Football/soccer	1,129.9	1,030.0	1,084.2	1,105.5	1,205.7	11%
Tennis	926.0	853.3	918.2	893.3	1,227.9	34%
Golf	1,002.7	945.9	916.9	995.4	1,204.1	31%
Basketball	724.4	686.6	753.7	830.5	989.6	31%
Netball	622.3	544.5	615.4	622.2	594.4	-3%
Australian football	502.5	514.6	587.9	537.4	621.5	6%
Surfing	506.3	488.5	474.3	561.1	674.7	42%
Sub total	10,707.7	10,334.5	10,858.4	11,622.4	13,408.6	23%
Yoga	905.8	980.8	1,100.9	1,355.7	1,465.6	33%
Pilates	554.4	622.3	679.0	784.7	908.1	34%
Sub total	1,460.2	1,603.2	1,779.9	2,140.4	2,373.6	33%

Source: AusPlay



Mount Osmond Golf Club - 4th Hole
Photo: Mount Osmond Golf Club / David Brand

Golf participation

Continuing to reverse the year on year trend that had been seen since 2016/17, golf recorded an annual increase of 21% over 2019/20 with an additional 210,000 people playing the game in the last 12 month period. Total growth experienced over equivalent figures from two years ago exceeds 285,000 people. Over this period male participation increased to 9.3% of the population (over 15), with female participation steady at 2.1%. Given the growth in male participation, female participation share fell to 19%, down from 21% in 2020/21.

Annual changes in golf participation evident since 2016/17 are summarised as follows:

Period	Annual % change
2016/17	-2%
2017/18	-6%
2018/19	-3%
2019/20	9%
2020/21	21%

Source: GBAS, AusPlay

Annual changes evident by gender are illustrated in Chart 2.

Further detail regarding the 2020/21 participation rate evident by other key cohorts, including location and state is illustrated in Chart 3.

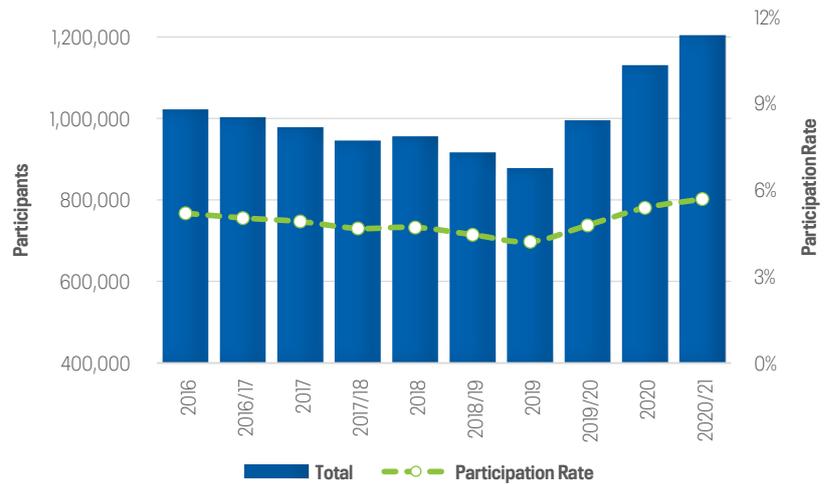


Chart 1: Annual golf participants and overall participation rate

Source: AusPlay

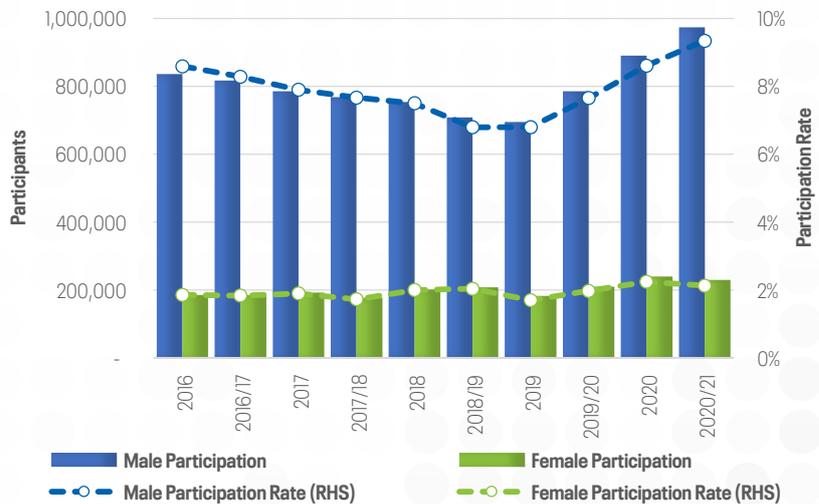


Chart 2: Annual golf participants by gender

Source: AusPlay

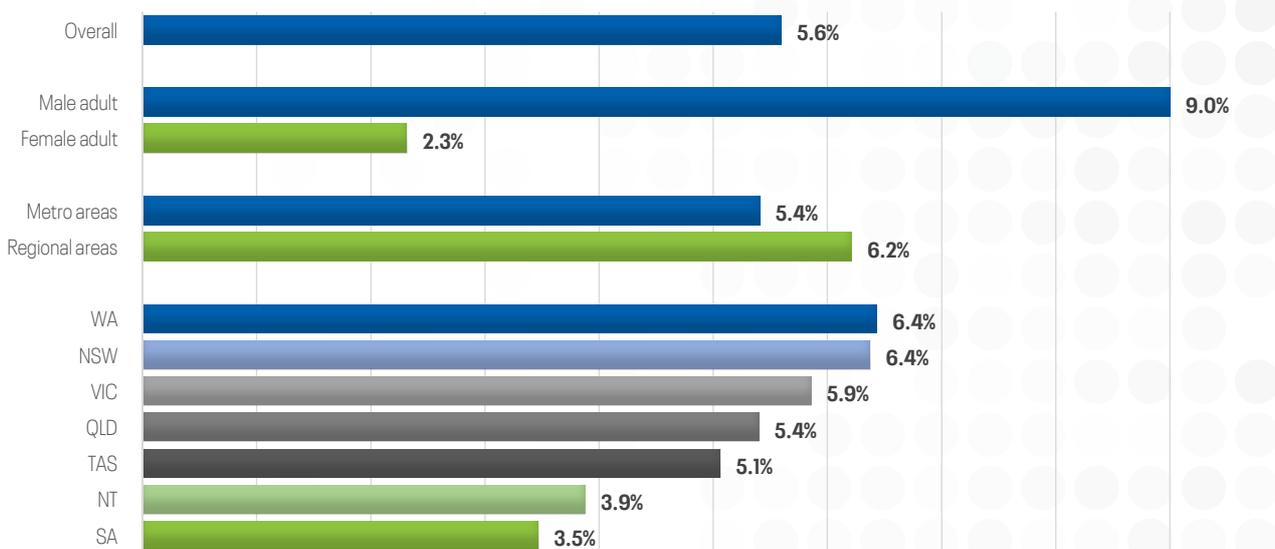


Chart 3: Golf participation by key cohort

Source: AusPlay

05

Club Membership

2021

Member golf association reporting

Club golfer numbers are reported annually each year by the seven respective state and territory member golf association bodies, five of which are operated by Golf Australia.

The reported numbers reflect those members who pay a capitation fee to their respective body, generally defined as those classified as 'having a class of membership that provides regular golf course access. Individuals that have a membership (and pay a capitation fee) at more than one club will therefore be counted in the reported figures multiple times. The respective reporting periods and the respective membership timing they represent are summarised in Table 2.

Period adjustment

The national outcomes reported in this document flow from the aggregation of the above state data and reporting periods. In this report a change in the collection order has been made, this caused by the impact of Covid-19 on club operations and delay in data collection.

To align with Golf Australia's reporting, and timing of the most up-to-date national data, membership numbers will now be reported on a financial year basis.

Prior to 2021, NSW data was the 'first' state collected. In order for this national report, and subsequent reports, to fully report on the impact of Covid-19 on club membership demand, NSW data is now the last state collected. This adjustment causes a re-alignment of previously reported national numbers. Historical outcomes have been re-stated on this basis.

Note: 2021 NSW numbers are preliminary due to collection delays as a result of Covid-19. Where numbers have not yet been provided, 2020 numbers have been utilised to create a state total.

Table 2: State reporting periods and membership timing

State	Data Collected	Numbers relate to ...
NSW/ACT*	June 2021	Most recent completed financial year
VIC	December 2020	Most recent completed financial year
QLD	December 2020	Point in time of collection
SA	December 2020	Point in time of collection
WA	December 2020	Point in time of collection
TAS	June 2021	Point in time of collection
NT	September 2020	Point in time of collection

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

Definitions

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

- **Member clubs:** Clubs that are fully affiliated with the relevant state bodies
- **Social clubs:** Registered clubs without full affiliation, which typically play in allotted tee times at public courses. These clubs may also be virtual in nature, 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

Profile of Australian clubs

Table 3: Club size profile by geographic area

	NSW	VIC	QLD	WA	SA	TAS	NT	Total	% of segment	% of total
Metropolitan										
Small clubs	22	12	3	8	10	2	-	57	28%	3%
Medium clubs	43	19	7	10	5	2	-	86	42%	5%
Large clubs	21	20	7	6	6	0	-	60	30%	4%
Total metro	86	51	17	24	21	4	-	203	100%	12%
Regional										
Small clubs	211	226	171	155	119	60	10	952	87%	58%
Medium clubs	48	28	30	4	2	2	1	115	10%	7%
Large clubs	17	6	7	0	0	0	0	30	3%	3%
Total regional	276	260	208	159	121	62	11	1,097	100%	67%
Total										
Total social clubs	23	120	1	126	73	2	0	345		21%
Total clubs	362	311	225	183	142	66	11	1,645		100%
Small clubs	233	238	174	163	129	62	10	1,009		78%
Medium clubs	91	47	37	14	7	4	1	201		15%
Large clubs	38	26	14	6	6	0	0	90		7%
Total member clubs	362	311	225	183	142	66	11	1,300		100%

Source: Golf Australia & member golf association

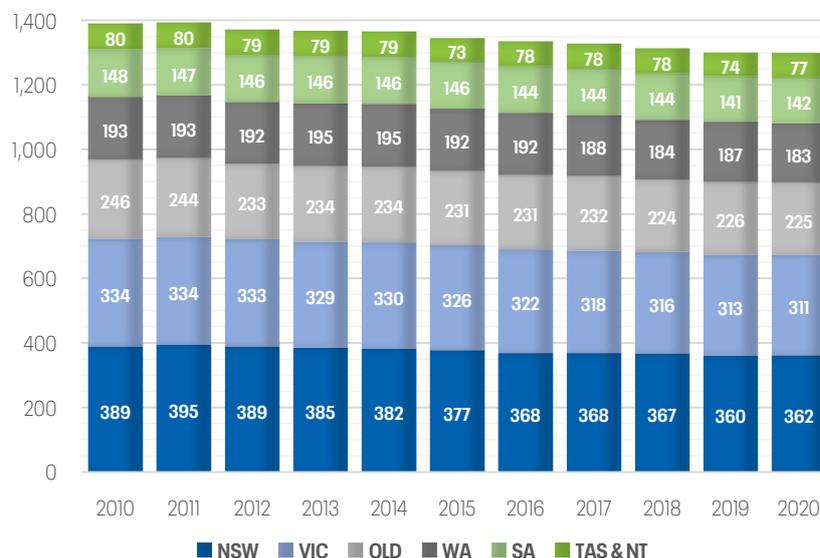
NB. Small clubs are defined as having 500 or less members, medium clubs 501 to 1,000 members, and large clubs over 1,000 members

Overall facility numbers for 2020/21

1,651 clubs reported membership numbers for 2020/21.

Key observations noted from the size profile data outlined below includes:

- 79% of clubs are member clubs (the aggregate of metropolitan and regional clubs), totalling 1,300 clubs.
- There are 345 social clubs affiliated to various state bodies, accounting for 21% of total clubs.
- 78% of member clubs are classified as 'small', having less than 500 members.
- 67% of member clubs (1,097) clubs are located in a regional area, with 88% of those clubs being classified as 'small'.
- 12% of member clubs are located in a metropolitan area, only 3% of the total (60) being classified as 'large', (over 1,000 members.)



Facility trends

As reported, there are currently 1,300 member clubs in Australia, six fewer than reported in 2019/20. There has been a steady decline in member clubs over the past 10-year period, from a high of 1,390 in 2010.

Chart 4: Member club count

Source: Golf Australia & member golf associations

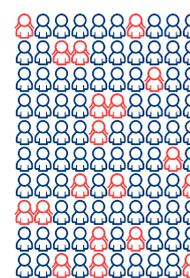
Playing members

Member numbers for 2020/21

National membership numbers across Australia for the year 2020/21 are reported as 409,970. This result represents a 6.4% increase (24,485 members) when measured against total 2019/20 results. Driven by the societal impacts and outcomes resulting from the Covid-19 pandemic, this result is the largest annual increase reported since national data collection began in 1970.

Positive movement was evident in all key market segments. Both member clubs and social clubs enjoyed growth approximating 6%, this in turn driven by growth in male numbers of over 7%. Junior numbers also enjoyed material growth, increasing by 15% over the prior year.

These outcomes are summarised in Table 4.



19%

Female members make up 19% of club membership numbers

Table 4: 2020/21 overall results

Cohort	2019/20	2020/21	% Share	Change from 2019/20	
				Actual	%
Member clubs	360,219	383,254	93%	23,035	6.4%
Social clubs	25,266	26,716	7%	1,450	5.7%
Males	310,559	333,583	81%	23,024	7.4%
Females	74,926	76,387	19%	1,461	1.9%
Adult male	299,604	320,795	78%	21,191	7.1%
Adult female	72,636	73,871	18%	1,235	1.7%
Adult total	372,240	394,666	96%	22,426	6.0%
Junior male	10,955	12,788	3%	1,833	16.7%
Junior female	2,290	2,516	1%	226	9.9%
Junior total	13,245	15,304	4%	2,059	15.5%
Overall	385,485	409,970	100%	24,485	6.4%

Source: Golf Australia & member golf associations

Five-year overall member totals

Table 5 summarises 2020/21 outcomes with context to the broader five-year trend.

Despite the 2020/21 member club outcomes, history indicated that annual growth is still being driven by social club growth, averaging over 4% growth for the last four years.

Year on year junior growth has also been evident since 2017/18.

Table 5: Five-year member totals

Cohort	2016/17	2017/18	2018/19	2019/20	2020/21	% change	
						From 2019/20	5 yr avg
Member clubs	369,099	362,073	360,636	360,219	383,254	6.4%	0.9%
Social clubs	22,633	22,525	21,860	25,266	26,716	5.7%	4.2%
Males	314,155	307,286	306,236	310,559	333,583	7.4%	1.5%
Females	77,577	77,312	76,260	74,926	76,387	1.9%	-0.4%
Adult male	302,657	296,697	295,345	299,604	320,795	7.1%	1.5%
Adult female	75,549	75,127	74,020	72,636	73,871	1.7%	-0.6%
Adult total	378,206	371,824	369,365	372,240	394,666	6.0%	1.1%
Junior male	11,498	10,589	10,891	10,955	12,788	16.7%	2.7%
Junior female	2,028	2,185	2,240	2,290	2,516	9.9%	5.5%
Junior total	13,526	12,774	13,131	13,245	15,304	15.5%	3.1%
Overall	391,732	384,598	382,496	385,485	409,970	6.4%	1.1%
% Female	19.8%	20.1%	19.9%	19.4%	18.6%		
% Juniors	3.5%	3.3%	3.4%	3.4%	3.7%		

Source: Golf Australia & member golf associations

Table 6: Five-year members by member club type

Member club type	2016/17	2017/18	2018/19	2019/20	2020/21	% change	
						From 2019/20	5 yr avg
Metropolitan	150,859	149,691	148,449	147,698	155,526	5.3%	0.8%
Regional	218,240	212,382	212,187	211,802	227,009	7.2%	1.0%
Small	122,613	118,456	116,911	115,440	124,894	8.2%	0.5%
Medium	130,923	128,573	128,270	131,310	141,773	8.0%	2.0%
Large	110,413	111,389	112,543	111,880	115,868	3.6%	1.2%
Overall	363,949	358,418	357,724	358,630	382,535	6.7%	1.3%

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

Five-year member club totals

Accounting for 93% of the market, results for total member clubs are further broken down by region and size. Both metropolitan and regional clubs enjoyed 5%+ growth in 2020/21, the latter reversing a declining trend since evident over the last three years.

Whilst at the aggregate all metropolitan and regional markets recorded member growth of 6.7%, the small clubs (less than 500 member clubs, 78% of the market) and medium sized clubs (500 to 1,000 members, 16% of the market) both recorded growth of above 8% in 2020/21.

Club member participation rate

For 2020/21 the overall golf club participation rate (members excluding from social clubs as a percentage of population 10+ years) across Australia is 1.7%.

By comparison the total participation rate in golf was 5.5%, indicating that approximately two thirds of the total market participate in the sport on a social basis.

Participation levels by cohort reflect patterns that consistent between club and total participation.

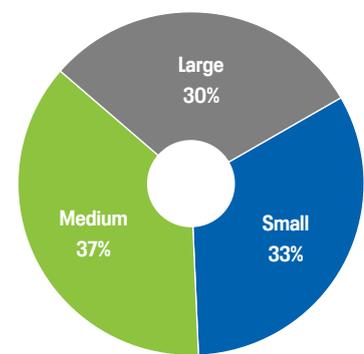


Chart 6: Share of total members by club size

Source: Golf Australia, member golf associations

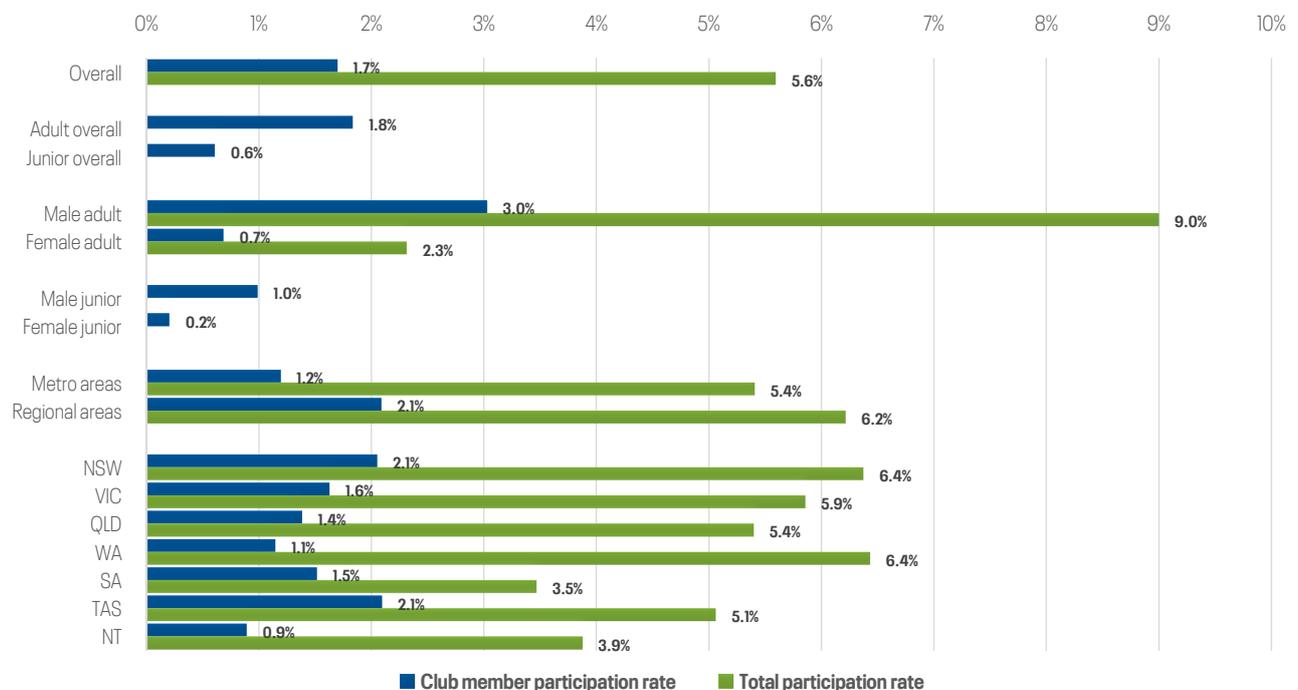


Chart 5: Participation rate by various cohorts

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

Playing members: key segments

Members by club type

The overall national movement in 2020/21 for member clubs was an increase of 6.4%. All states except NT enjoyed growth well above recent trends. Victoria recorded the largest growth of 8.9% despite long periods of lockdown measures. South Australia experienced an increase of 7.2%, driven by growth in social clubs affiliated in that state.

Despite restricted access for some periods of the year, social clubs experienced continued member growth in 2020/21. Growth was most evident in clubs affiliated in SA, with approximately 2,800 new members added. Growth of 2% or more was also seen in the other states where social clubs are most evident. The closure of the RACV social club impacted 2020/21 results recorded in Victoria.

Social club members now account for 6.5% of total club members across Australia.

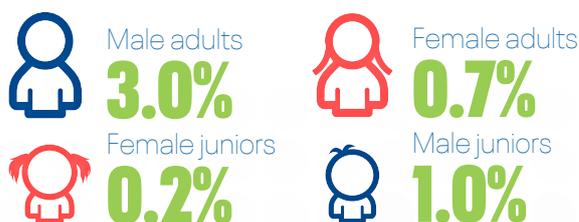


Table 7: Member clubs

State	2016/17	2017/18	2018/19	2019/20	2020/21	% change	
						From 2019/20	5 yr avg
NSW	148,034	145,664	144,705	145,871	152,939	4.8%	0.8%
VIC	94,487	93,053	92,119	91,584	99,724	8.9%	1.4%
QLD	63,478	61,216	61,807	61,432	65,340	6.4%	0.7%
WA	26,491	26,801	26,579	25,642	27,425	7.0%	0.9%
SA	23,732	23,022	23,200	23,138	24,812	7.2%	1.1%
TAS	10,705	10,280	10,209	9,901	10,353	4.6%	-0.8%
NT	2,172	2,037	2,017	1,932	1,942	0.5%	-2.8%
Overall	369,099	362,073	360,636	359,500	382,535	6.4%	0.9%

Source: Golf Australia, member golf associations

Table 8: Social clubs

State	2016/17	2017/18	2018/19	2019/20	2020/21	% change	
						From 2019/20	5 yr avg
NSW	-	-	-	719	719	0.0%	-
VIC	12,528	12,290	10,682	10,341	8,303	-19.7%	-9.8%
QLD	306	286	267	267	267	0.0%	-3.4%
WA	5,856	6,047	6,187	6,471	7,182	11.0%	5.2%
SA	3,919	3,871	4,695	8,129	10,892	34.0%	29.1%
TAS	24	31	29	58	72	24.1%	31.6%
Overall	22,633	22,525	21,860	25,985	27,435	5.6%	4.9%

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

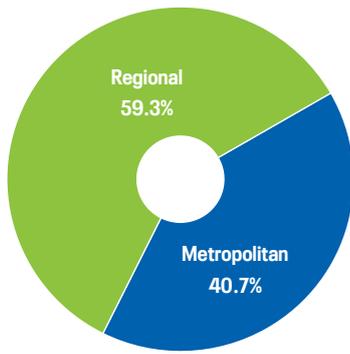
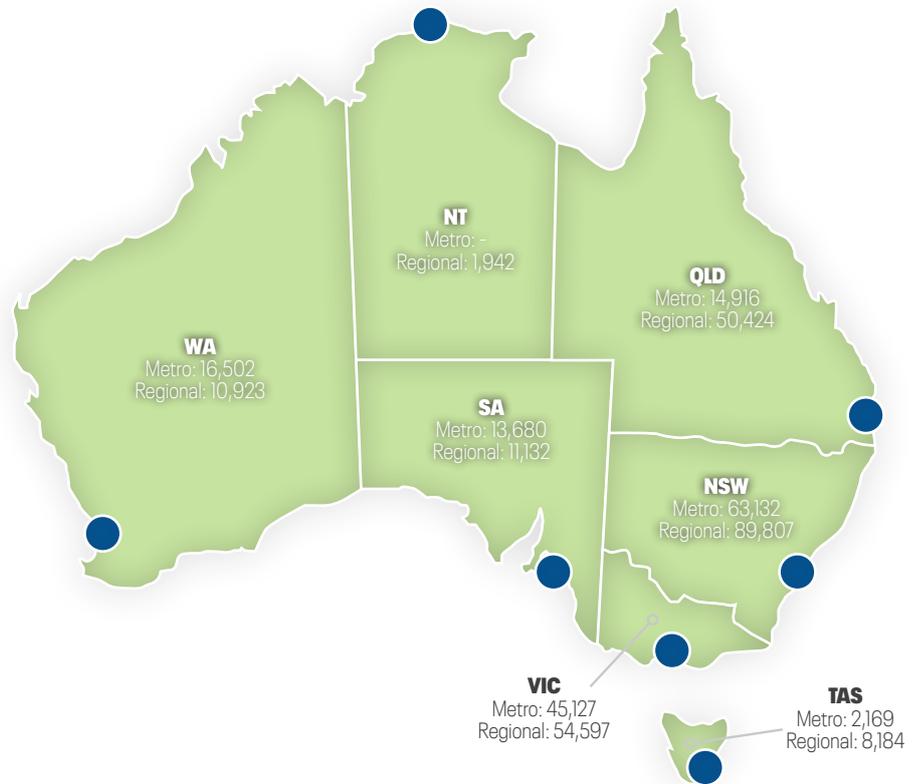


Chart 7: Share of total members by general geographic area

Source: Golf Australia, member golf associations



Members by club location

In 2020/21, metropolitan based clubs recorded an average increase of 5.3%. Growth of over 8% was recorded in WA, the state least impacted by Covid-19 lockdowns. Despite longer lockdown periods in Victoria, metropolitan member demand still increased by 5.2%.

Regional based clubs recorded an average increase of 7.2%. Growth of over 10% was recorded in regional SA and regional Victoria.

Table 9: Metropolitan clubs

State	2016/17	2017/18	2018/19	2019/20	2020/21	% change	
						From 2019/20	5 yr avg
NSW	61,182	60,901	60,093	59,989	63,132	5.2%	0.8%
VIC	43,948	43,666	43,180	42,890	45,127	5.2%	0.7%
QLD	14,904	14,532	14,322	14,383	14,916	3.7%	0.0%
WA	15,545	15,818	15,942	15,263	16,502	8.1%	1.5%
SA	13,074	12,534	12,731	13,090	13,680	4.5%	1.1%
TAS	2,206	2,240	2,181	2,083	2,169	4.1%	-0.4%
Overall	150,859	149,691	148,449	147,698	155,526	5.3%	0.8%

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

Table 10: Regional clubs

State	2016/17	2017/18	2018/19	2019/20	2020/21	% change	
						From 2019/20	5 yr avg
NSW	86,852	84,763	84,612	85,882	89,807	4.6%	0.8%
VIC	50,539	49,387	48,939	48,694	54,597	12.1%	1.9%
QLD	48,574	46,684	47,485	47,049	50,424	7.2%	0.9%
WA	10,946	10,983	10,637	10,379	10,923	5.2%	-0.1%
SA	10,658	10,488	10,469	10,048	11,132	10.8%	1.1%
TAS	8,499	8,040	8,028	7,818	8,184	4.7%	-0.9%
NT	2,172	2,037	2,017	1,932	1,942	0.5%	-2.8%
Overall	218,240	212,382	212,187	211,802	227,009	7.2%	1.0%

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

Membership by gender

Total reported male members increased by 7.4% in 2020/21. All markets except the NT recorded increases of more than 5%, with a remarkable 11% recorded in Victoria.

Female member demand was not as strong as male demand, growing by 1.9% in 2020/21. Results in Victoria and for aggregated female social club members declined, these results being opposite to recorded male numbers.

The resultant gender mix reported for 2020/21, impacted by strong male growth, sees female share of membership demand fall by 1% to 19%. Female share of member numbers is typically above the national average in larger clubs (21%).

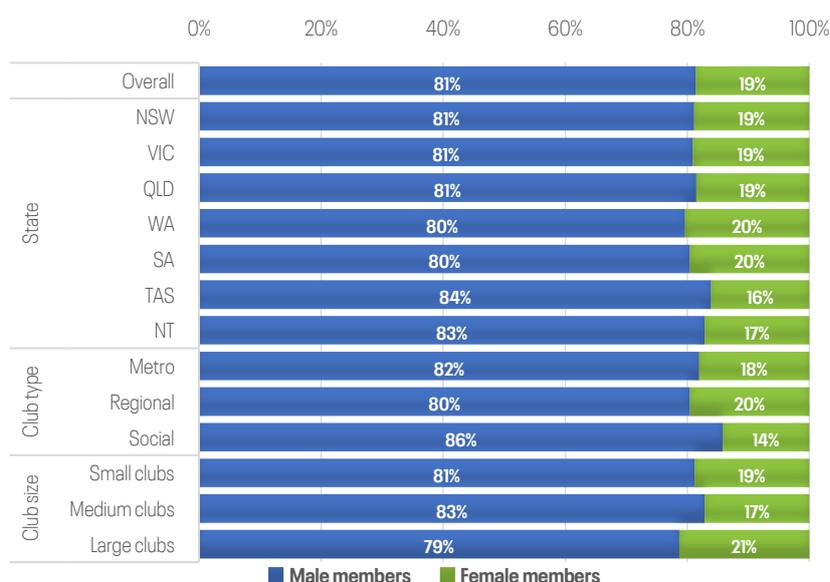


Chart 8: Gender proportion by state

Source: Golf Australia, member golf associations

Table 11: Male members

State	2016/17	2017/18	2018/19	2019/20	2020/21	% change	
						From 2019/20	5 yr avg
NSW	118,720	116,998	116,264	117,941	124,050	5.2%	1.1%
VIC	74,976	73,855	73,298	72,470	80,681	11.3%	1.9%
QLD	51,268	48,590	49,436	49,823	53,220	6.8%	0.9%
WA	20,825	20,963	20,800	20,136	21,836	8.4%	1.2%
SA	18,803	18,256	18,401	18,378	19,955	8.6%	1.5%
TAS	8,928	8,501	8,469	8,250	8,688	5.3%	-0.7%
NT	1,810	1,713	1,660	1,614	1,609	-0.3%	-2.9%
Member clubs	295,330	288,876	288,328	288,612	310,039	7.4%	1.2%
Social clubs	18,825	18,410	17,908	21,947	23,544	7.3%	5.8%
Overall	314,155	307,286	306,236	310,559	333,583	7.4%	1.5%

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

Table 12: Female members

State	2016/17	2017/18	2018/19	2019/20	2020/21	% change	
						From 2019/20	5 yr avg
NSW	29,314	28,666	28,441	27,930	28,889	3.4%	-0.4%
VIC	19,511	19,198	18,821	19,114	19,043	-0.4%	-0.6%
QLD	12,210	12,626	12,371	11,609	12,120	4.4%	-0.2%
WA	5,666	5,838	5,779	5,506	5,589	1.5%	-0.3%
SA	4,929	4,766	4,799	4,760	4,857	2.0%	-0.4%
TAS	1,777	1,779	1,740	1,651	1,665	0.8%	-1.6%
NT	362	324	357	318	333	4.7%	-2.1%
Member clubs	73,769	73,197	72,308	70,888	72,496	2.3%	-0.4%
Social clubs	3,808	4,115	3,952	4,038	3,891	-3.6%	0.5%
Overall	77,577	77,312	76,260	74,926	76,387	1.9%	-0.4%
% of total	21.0%	21.4%	21.1%	20.8%	20.0%		

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

Junior members

Reported junior members (under the age of 18) totalled 15,304 in 2020/21, which represents an increase of 16% over 2019.

This positive result was driven by reported outcomes in SA (+35%) and Victoria (+34%). Proportionately, junior growth was more evident in regional markets (+20%) and junior boys (+17%).

Overall junior members represent 3.7% of the total member count across the country.

Junior representation was slightly higher at regional clubs (4.3%) than metropolitan clubs (3.9%). By gender, male juniors represent a slightly higher proportion of total males (3.8%) than junior females of total females; (3.3%).

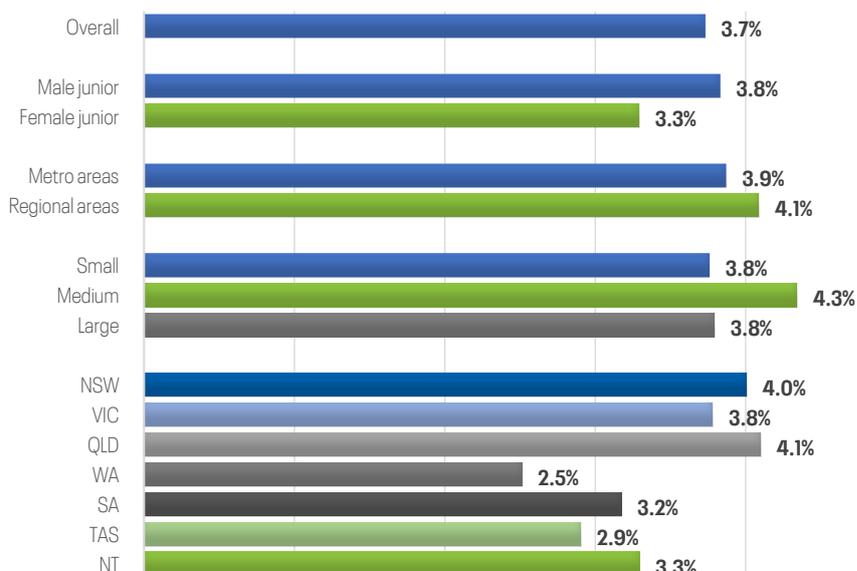


Chart 9: Junior percentage of total members by type

Source: Golf Australia

Table 13: Junior male members by state

Cohort	2016/17	2017/18	2018/19	2019/20	2020/21	% change	
						From 2019/20	5 yr avg
NSW	4,785	4,320	4,181	4,597	5,197	13.1%	2.1%
VIC	3,005	2,845	2,620	2,569	3,566	38.8%	4.4%
QLD	1,939	1,729	2,464	2,206	2,062	-6.5%	1.5%
WA	720	695	627	601	686	14.1%	-1.2%
SA	697	660	658	693	960	38.5%	8.3%
TAS	293	283	291	241	269	11.6%	-2.1%
NT	59	57	50	48	48	0.0%	-5.0%
Metropolitan	4,185	3,849	4,068	4,469	4,761	6.5%	3.3%
Regional	7,225	6,643	6,689	6,390	7,892	23.5%	2.2%
Social	88	97	134	96	135	40.6%	11.3%
Overall	11,498	10,589	10,891	10,955	12,788	16.7%	2.7%
% of total	3.8%	3.6%	3.7%	3.7%	4.0%		

Table 14: Junior female members by state

Cohort	2016/17	2017/18	2018/19	2019/20	2020/21	% change	
						From 2019/20	5 yr avg
NSW	687	719	690	845	959	13.5%	8.7%
VIC	469	483	467	471	521	10.6%	2.7%
QLD	503	602	703	634	628	-0.9%	5.7%
WA	158	159	163	147	184	25.2%	3.9%
SA	151	152	153	145	174	20.0%	3.6%
TAS	35	45	39	32	34	6.3%	-0.7%
NT	25	25	25	16	16	0.0%	-10.6%
Metropolitan	871	872	895	961	1,099	14.4%	6.0%
Regional	1,139	1,297	1,323	1,315	1,391	5.8%	5.1%
Social	18	16	22	14	26	85.7%	9.6%
Overall	2,028	2,185	2,240	2,290	2,516	9.9%	5.5%
% of total	2.7%	2.9%	3.0%	3.2%	3.4%		

Source: Golf Australia & member golf associations



15.5%

Total reported
junior members
increase

MyGolf program

MyGolf is Australia's national junior introductory program to develop and promote participation in golf. The MyGolf program is designed for 5 to 12 year old children and is the major driver of junior golf participation in Australia.

Given the hands on nature of the program, and the restrictions that were in place during Covid-19 pandemic, the MyGolf program recorded a 21% decline in participation in 2020/21. Despite the overall decline, female participation remained steady at 26%.

With registered centres growing by over 27% in the past 12 months and an average of 19% a year for the past five years, the goals of 30,000 total participants and 28% female remain as programs come out of hibernation and begin again during 2021 and 2022.

MyGolf participation numbers and total centres delivering the program for the past five years are summarised in Table 15 and Table 16.

Table 15: MyGolf participants

State	2016/17	2017/18	2018/19	2019/20	2020/21	% change	
						From 2019/20	5 yr avg
NSW	1,290	1,806	3,523	4,192	2,492	-40.6%	8.4%
VIC	1,982	3,191	4,805	5,425	5,930	9.3%	16.8%
QLD	1,486	2,254	4,660	10,032	6,646	-33.8%	31.0%
WA	695	827	1,695	1,808	1,883	4.1%	22.8%
SA	571	954	1,121	1,381	1,162	-15.9%	5.1%
TAS	61	405	752	914	736	-19.5%	16.1%
NT	169	237	281	377	238	-36.9%	0.1%
Total	6,254	9,674	16,837	24,129	19,087	-20.9%	18.5%
Total girls	1,661	2,354	3,976	5,956	4,955	-16.8%	20.5%
Girls %	27%	24%	24%	25%	26%		

Table 16: MyGolf centres

State	2016/17	2017/18	2018/19	2019/20	2020/21	% change	
						From 2019/20	5 yr avg
NSW	77	109	150	108	83	-28.0%	1.9%
VIC	95	135	150	127	117	-15.3%	5.3%
QLD	59	83	90	81	82	-10.0%	8.6%
WA	29	40	45	48	42	6.7%	9.7%
SA	24	33	35	39	35	11.4%	9.9%
TAS	15	20	20	18	22	-10.0%	10.0%
NT	5	7	7	4	5	-42.9%	0.0%
Overall	304	427	497	425	386	-14.5%	6.2%
Registered centres	484	600	709	903	967	27.4%	18.9%



The Tuohy Trophy Family Event, Glenelg Golf Club - 15th Hole
Photo: Glenelg Golf Club / David Brand

Member attraction & attrition

Utilising data from GOLF Link, annual national club attraction & attrition rates (excluding social clubs) are able to be calculated by utilising active member counts, new member counts (defined as being a golf club member playing 1 or more competition rounds of golf), and prior year closing member counts.

Table 17 depicts the relevant attraction and attrition rates for metropolitan and regional clubs, as well as the overall result. With over 47,000 new members recorded for 2020/21 (playing 1 round or more of competition golf), the analysed data indicates a resultant

national new club member attraction rate of 14% and a national member attrition rate of 11%. Attrition rates are slightly higher at regional clubs.

Chart 10 depicts the same attraction and attrition data presented by age and gender. As illustrated in Golf Australia's new member demand reports published in late 2020, the increased interest in golf has predominantly come from males, particularly the younger age cohorts, Attrition rates were reasonably consistent when measured by age and gender.



new members

14%

For 2020/21 the
**new club member
attraction rate**
was 14%

Table 17: Attraction and attrition rates by state / region

State	Metropolitan		Regional		Total	
	Attraction	Attrition	Attraction	Attrition	Attraction	Attrition
NSW	13%	9%	14%	10%	13%	9%
VIC	12%	12%	16%	10%	14%	11%
QLD	16%	10%	16%	14%	16%	13%
SA	12%	9%	15%	12%	14%	10%
WA	13%	9%	13%	12%	13%	10%
TAS	-	-	12%	10%	12%	10%
NT	-	-	22%	13%	22%	13%
Overall	13%	10%	15%	11%	14%	11%

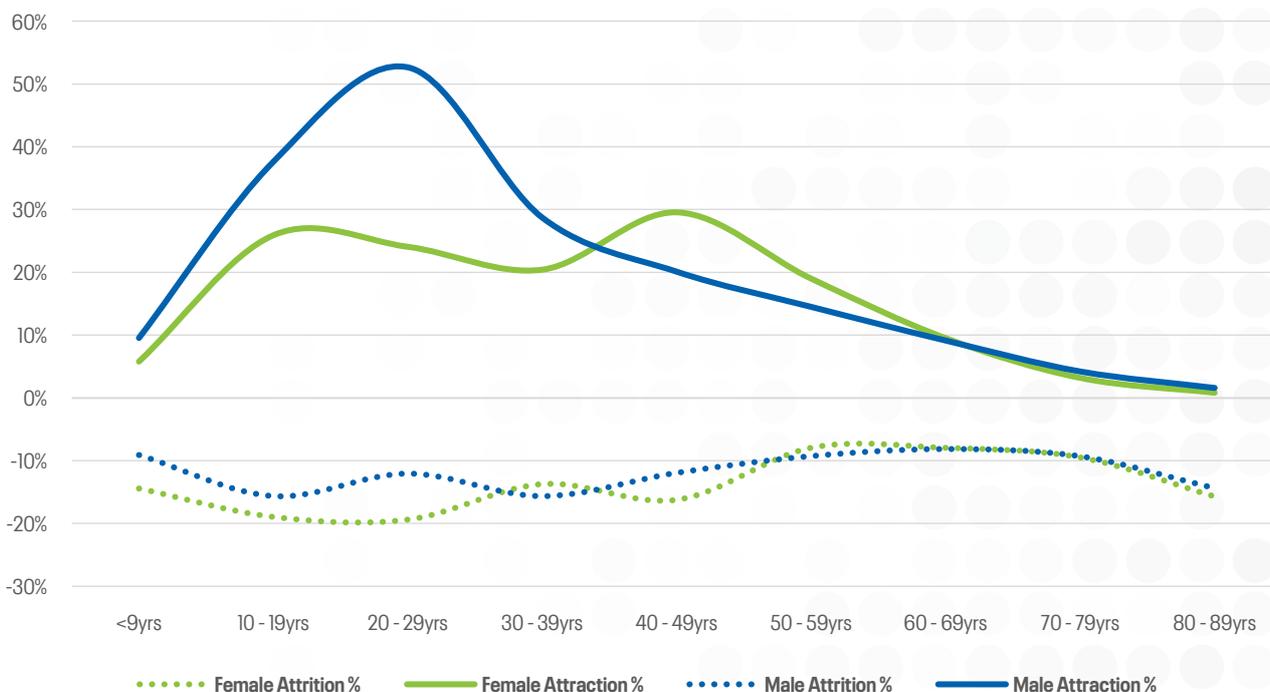


Chart 10: Attraction and attrition rates by age and gender
Source: Golf Australia

Playing members: age profile

Average age

The average reported age of club members across Australia is 56.9 years and is reasonably consistent by state. Male members have an average age of 55.3 years (54.7 in 2019/20) with female members averaging 16% higher at 64.3 years (63.9 2019/20).

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. Evidencing golf's continued appeal to the older age cohorts, it shows a material portion of club members in the 55 to 74 year cohort - 44% of male members and 62% of female members - versus a lower national population share of this cohort of only 24%.

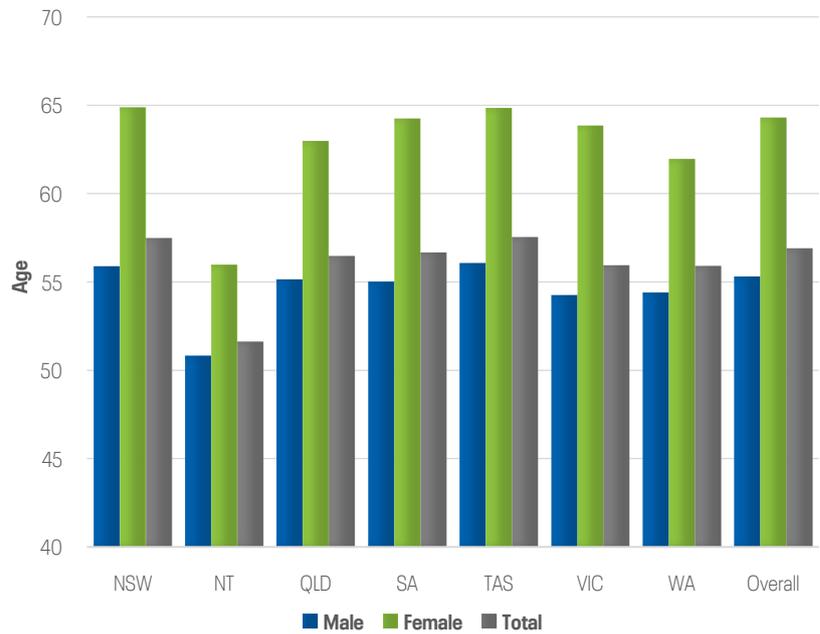


Chart 11: Average age by state
Source: GOLF Link

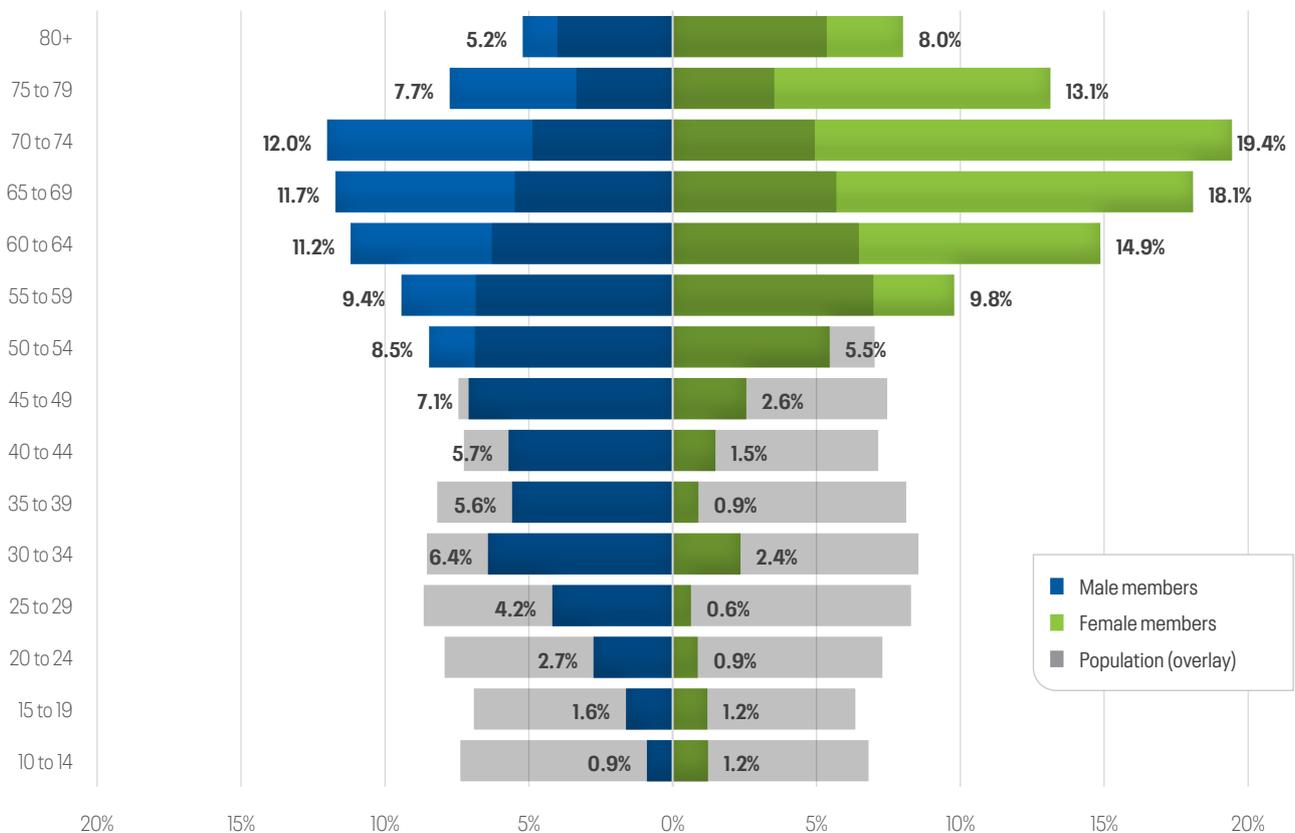


Chart 12: Age pyramid - members versus population
Source: GOLF Link, Australian Bureau of Statistics

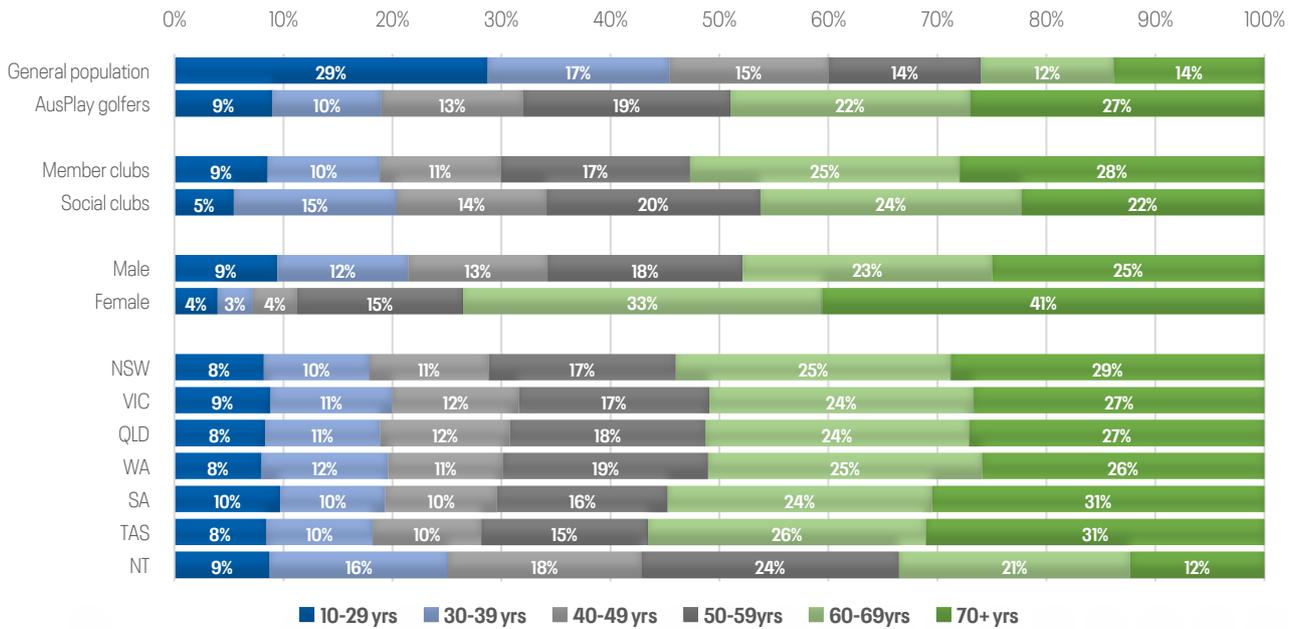


Chart 13: Age breakdown by various cohorts
Source: GOLF Link, AusPlay

Age mix by segment

To provide further context for the data above, Chart 13 represents the age breakdown across various cohorts – club type, gender and state. A similar age profile is evident for member clubs and social clubs, while an older profile is evident for female members.

New member age profile

New members to club golf are generally younger than the broader club member age profile. In 2020/21 60% of new members were under the age of 50 compared to 30% for existing members.

New member age profile vs 2019/20

Whilst it has been typical for new members to club golf to generally exhibit a younger age profile than the broader club member age profile, the 2020/21 new member age profile is one that shows an even stronger skew to the younger age cohorts. In 2020/21 34% of new members were aged between 15 and 34 years, compared to 25% for the same age range in 2019/20.



Chart 14: New member age profile compared to existing members
Source: GOLF Link

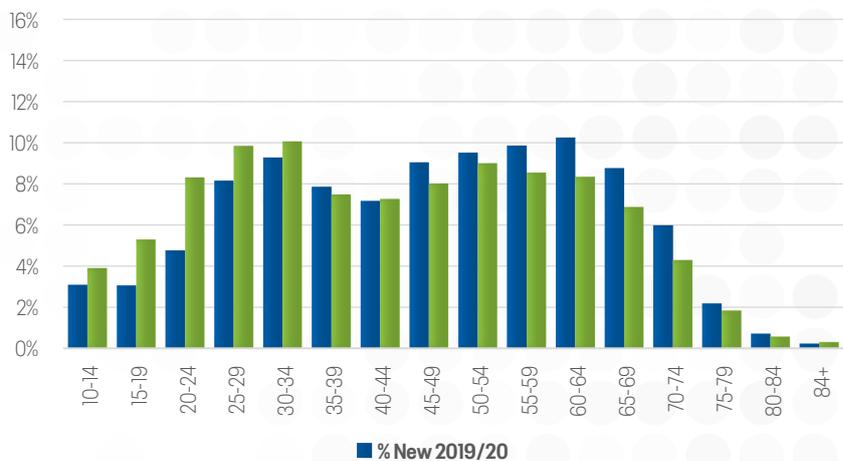


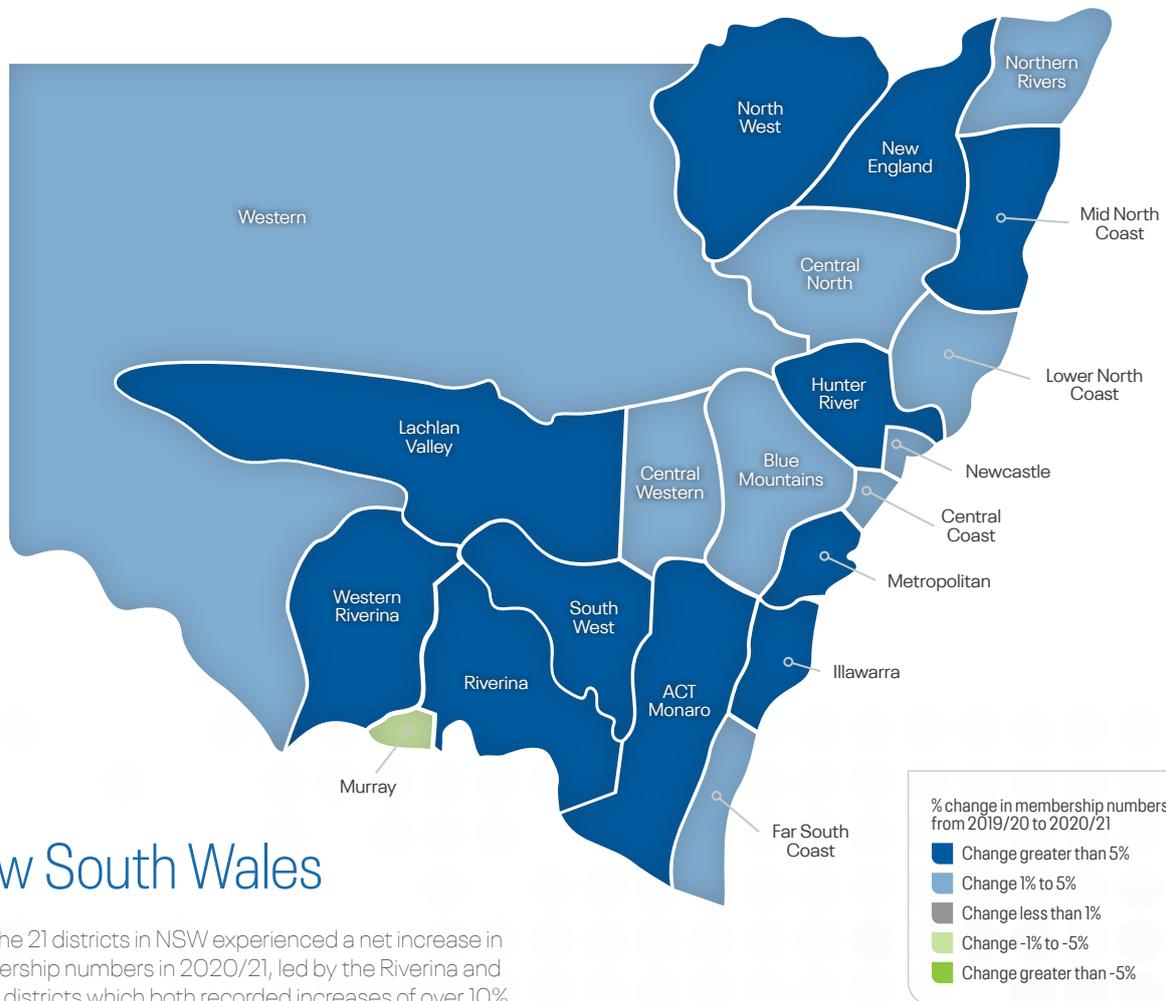
Chart 15: 2020/21 new member age profile compared to 2019/20 new member age profile
Source: GOLF Link

Playing members: results by state-based districts



Mount Compass Golf Course - 4th & 2nd Holes
Photo: Mount Compass Golf Course / David Brand

20/21



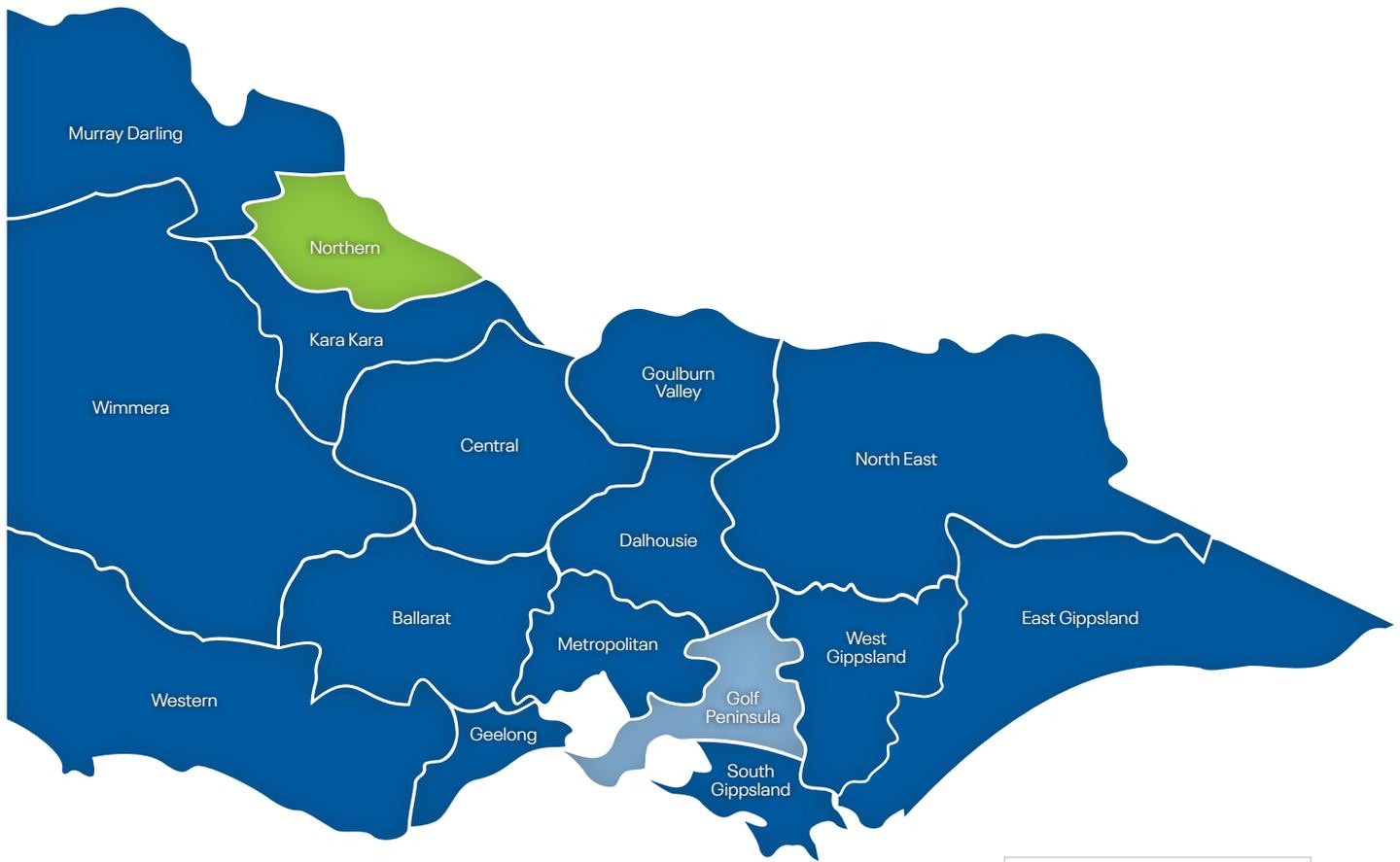
New South Wales

20 of the 21 districts in NSW experienced a net increase in membership numbers in 2020/21, led by the Riverina and Hunter districts which both recorded increases of over 10%.

Table 18: New South Wales districts

Region	2016/17	2017/18	2018/19	2019/20	2020/21	% Change	
						From 2019/20	5 yr avg
Riverina	1,762	1,740	1,828	1,897	2,163	14.0%	5.3%
Hunter River	3,941	4,021	3,888	3,895	4,355	11.8%	2.5%
New England	1,431	1,333	1,178	1,286	1,394	8.4%	-0.7%
Western Riverina	5,342	4,919	5,231	5,276	5,681	7.7%	1.6%
South West	1,291	1,243	1,182	1,238	1,328	7.3%	0.7%
ACT-Monaro	8,369	8,169	7,962	7,897	8,457	7.1%	0.3%
Lachlan Valley	827	822	811	853	912	6.9%	2.5%
Mid North Coast	4,476	4,352	4,382	4,759	5,088	6.9%	3.3%
North West	1,016	976	938	855	909	6.3%	-2.7%
Illawarra	8,372	8,454	8,803	8,424	8,880	5.4%	1.5%
Metropolitan	61,706	61,442	60,559	60,381	63,524	5.2%	0.7%
Western	1,862	1,733	1,781	1,654	1,729	4.5%	-1.8%
Northern Rivers	7,582	7,344	7,481	8,180	8,532	4.3%	3.0%
Central Coast	7,048	6,315	6,443	6,584	6,824	3.6%	-0.8%
Far South Coast	5,403	5,060	5,208	5,038	5,200	3.2%	-1.0%
Lower North Coast	4,628	4,775	4,792	5,088	5,247	3.1%	3.2%
Central Western	3,542	3,431	3,411	3,581	3,677	2.7%	0.9%
Central North	2,422	2,364	2,238	2,180	2,223	2.0%	-2.1%
Blue Mountains	1,527	1,451	1,341	1,485	1,503	1.2%	-0.4%
Newcastle	8,460	8,569	8,199	9,072	9,174	1.1%	2.0%
Murray	7,027	7,151	7,049	6,248	6,139	-1.7%	-3.3%
NSW total	148,034	145,664	144,705	145,871	152,939	4.8%	0.8%

Source: Golf Australia



% change in membership numbers from 2019/20 to 2020/21

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

Victoria

15 of the 16 districts in Victoria experienced an increase in member numbers in 2020/21, led by the Murray Dowling, Central and Dalhousie regions all recording increases of over 20%.

Table 19: Victoria districts

Region	2016/17	2017/18	2018/19	2019/20	2020/21	% Change	
						From 2019/20	5 yr avg
Murray Darling	2,453	2,260	2,162	1,840	2,278	23.8%	-1.8%
Central	2,862	2,606	2,642	2,520	3,090	22.6%	1.9%
Dalhousie	2,009	1,889	1,903	1,972	2,373	20.3%	4.3%
South Gippsland	2,436	2,396	2,348	2,339	2,772	18.5%	3.3%
Kara Kara	438	401	376	333	392	17.7%	-2.7%
West Gippsland	3,436	3,549	3,393	3,206	3,743	16.7%	2.2%
Wimmera	1,992	1,835	1,755	1,650	1,920	16.4%	-0.9%
Ballarat	3,398	3,354	3,397	3,317	3,754	13.2%	2.5%
North East	3,044	2,816	2,845	2,955	3,324	12.5%	2.2%
Goulburn Valley	3,592	3,583	3,562	3,661	4,107	12.2%	3.4%
Geelong	10,421	10,639	10,599	10,784	12,025	11.5%	3.6%
Western	3,424	3,360	3,318	3,395	3,753	10.5%	2.3%
East Gippsland	2,491	2,406	2,288	2,395	2,627	9.7%	1.3%
Metropolitan	43,543	43,292	42,794	42,519	44,718	5.2%	0.7%
Golf Peninsula	7,703	7,447	7,520	7,509	7,759	3.3%	0.2%
Northern	840	846	831	818	680	-16.9%	-5.1%
VIC total	94,082	92,679	91,733	91,213	99,315	8.9%	1.4%

Source: Golf Australia

Queensland

All of the 14 districts in Queensland experienced an increase in membership numbers in 2020/21, led by Moreton, North Queensland, South East Queensland and the Gold Coast all recording increases of more than 10%.

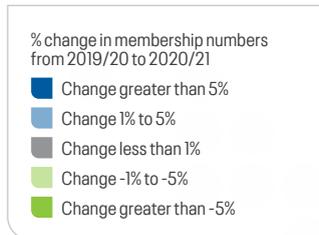
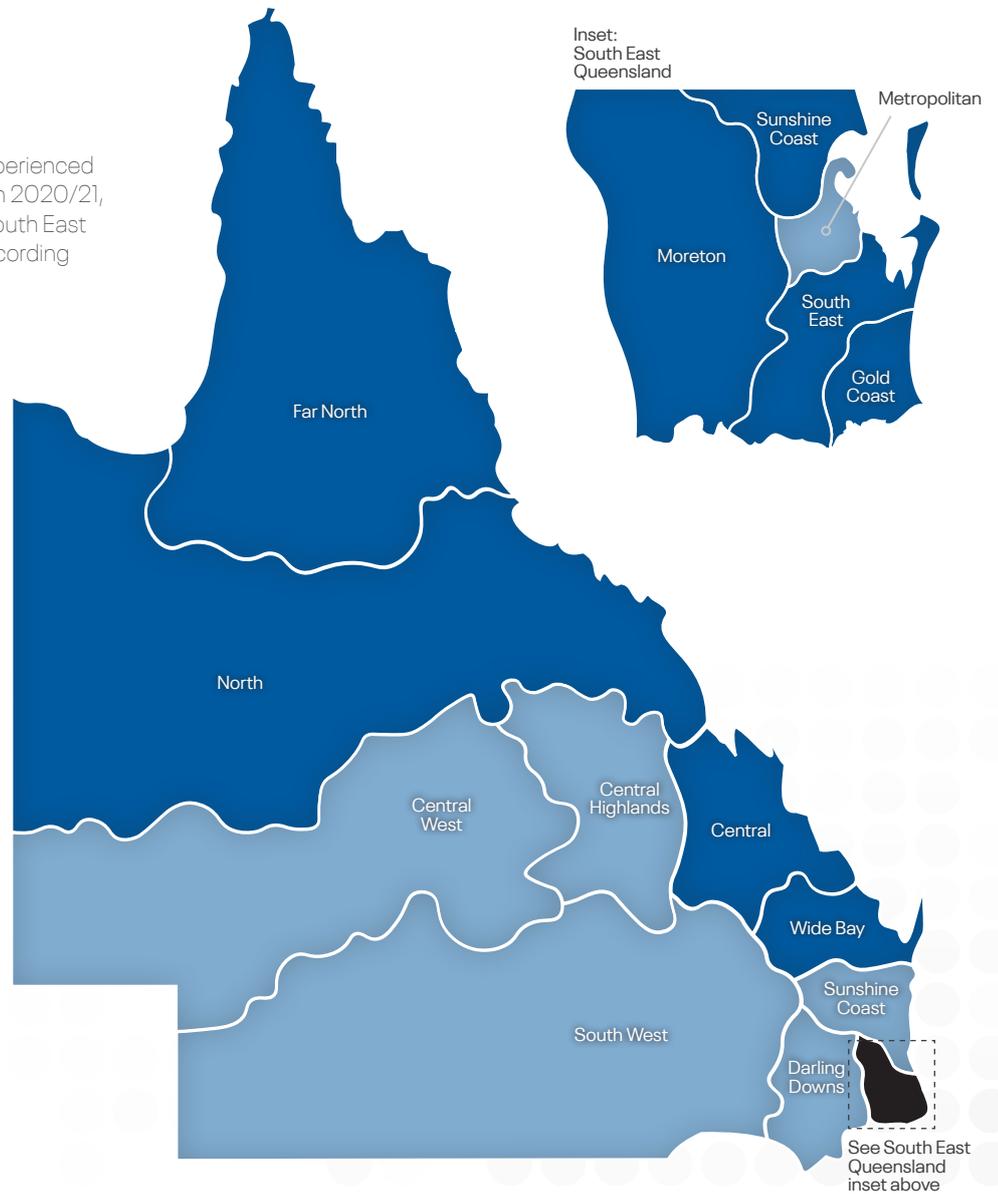


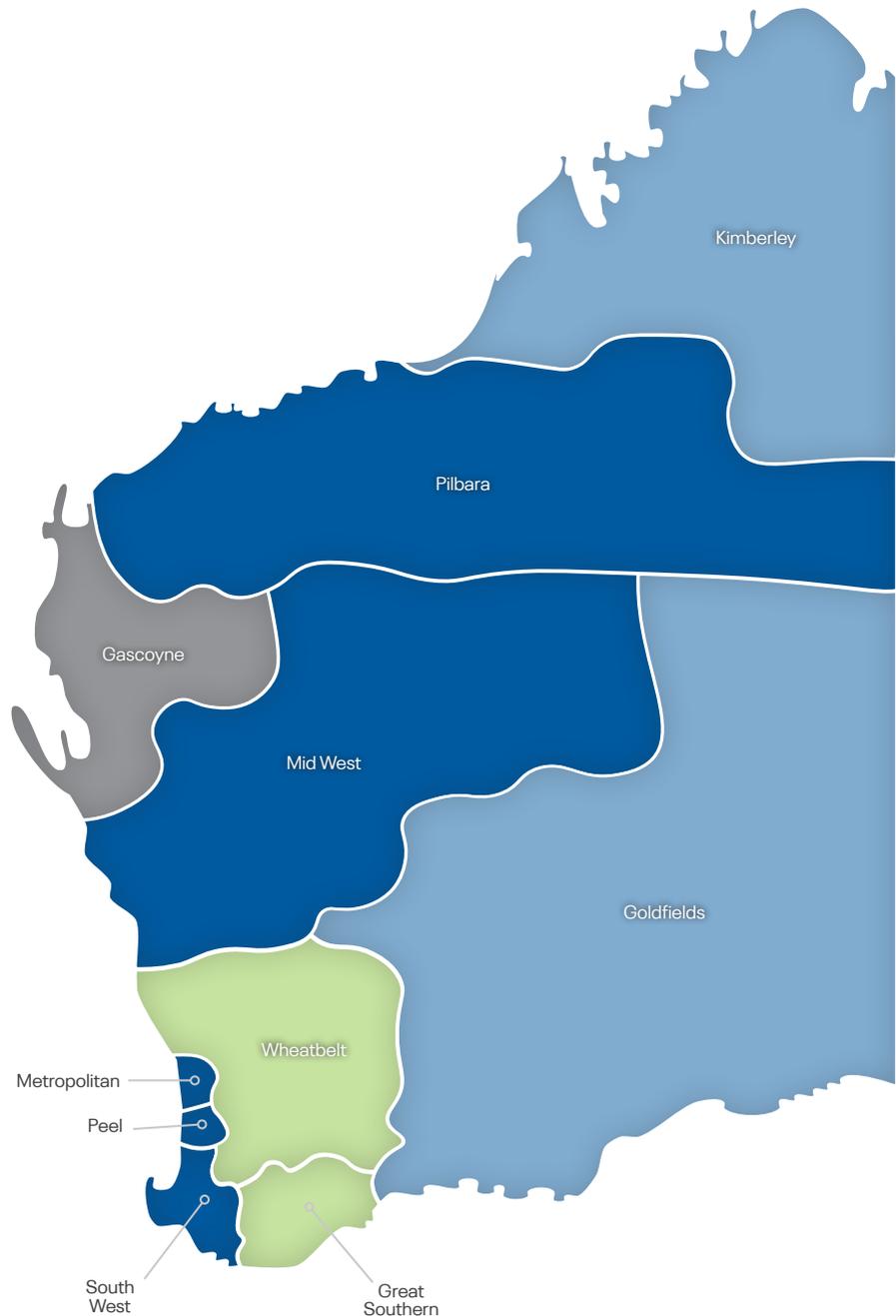
Table 20: Queensland districts

Region	2016/17	2017/18	2018/19	2019/20	2020/21	% Change	
						From 2019/20	5 yr avg
Moreton	2,016	2,038	2,110	1,984	2,284	15.1%	3.2%
North	4,175	4,154	4,360	4,258	4,772	12.1%	3.4%
South East	4,864	4,571	4,925	4,921	5,493	11.6%	3.1%
Gold Coast	10,069	8,560	9,177	8,649	9,544	10.3%	-1.3%
Central	2,972	3,005	2,967	3,099	3,328	7.4%	2.9%
Wide Bay	3,027	3,083	3,027	2,997	3,217	7.3%	1.5%
Far North	2,898	3,037	2,506	2,729	2,893	6.0%	0.0%
Metropolitan	14,904	14,532	14,322	14,383	14,916	3.7%	0.0%
South West	720	692	658	732	757	3.4%	1.3%
Sunshine Coast	12,710	12,664	12,811	13,083	13,458	2.9%	1.4%
Central Highlands	1,180	1,096	1,139	931	956	2.7%	-5.1%
Central West	244	238	202	214	218	1.9%	-2.8%
Darling Downs	3,699	3,546	3,603	3,452	3,504	1.5%	-1.3%
QLD total	63,478	61,216	61,807	61,432	65,340	6.4%	0.7%

Source: Golf Australia

Western Australia

8 of the 10 districts in Western Australia experienced an increase in member numbers in 2020/21, led by the Mid West and Peel districts with increases of above 10%.



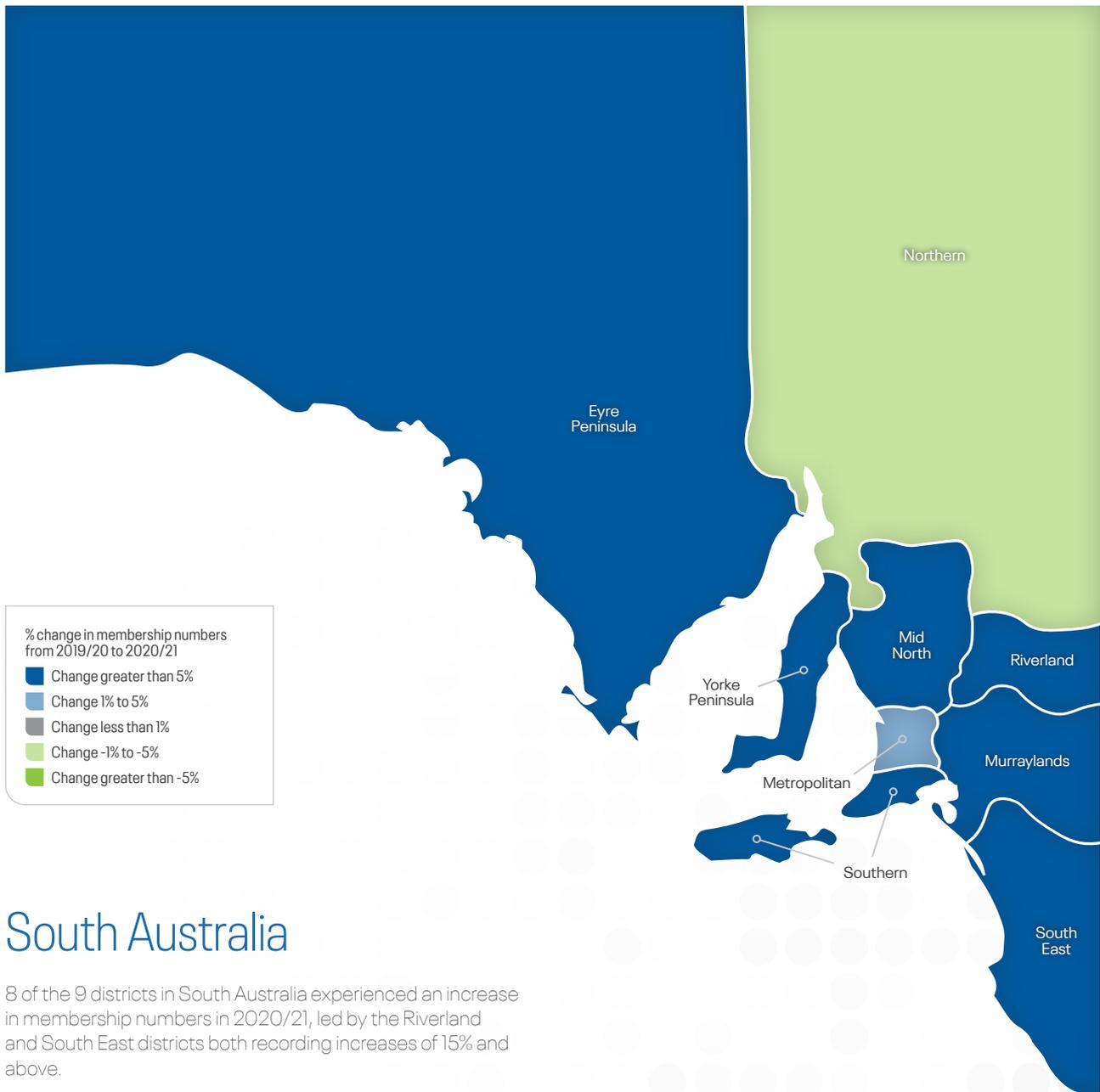
% change in membership numbers from 2019/20 to 2020/21

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

Table 21: Western Australia districts

Region	2016/17	2017/18	2018/19	2019/20	2020/21	% Change	
						From 2019/20	5 yr avg
Mid West	999	972	885	866	979	13.0%	-0.5%
Peel	685	655	682	588	652	10.9%	-1.2%
South West	3,997	4,041	4,018	3,886	4,234	9.0%	1.5%
Metropolitan	15,545	15,818	15,942	15,263	16,502	8.1%	1.5%
Pilbara	402	412	378	310	330	6.5%	-4.8%
Kimberley	380	411	423	435	453	4.1%	4.5%
Goldfields	793	862	808	848	878	3.5%	2.6%
Gascoyne	117	117	96	105	105	0.0%	-2.7%
Great Southern	1,380	1,381	1,305	1,304	1,289	-1.2%	-1.7%
Wheatbelt	2,193	2,132	2,042	2,037	2,003	-1.7%	-2.2%
WA total	26,491	26,801	26,579	25,642	27,425	7.0%	0.9%

Source: Golf Australia



South Australia

8 of the 9 districts in South Australia experienced an increase in membership numbers in 2020/21, led by the Riverland and South East districts both recording increases of 15% and above.

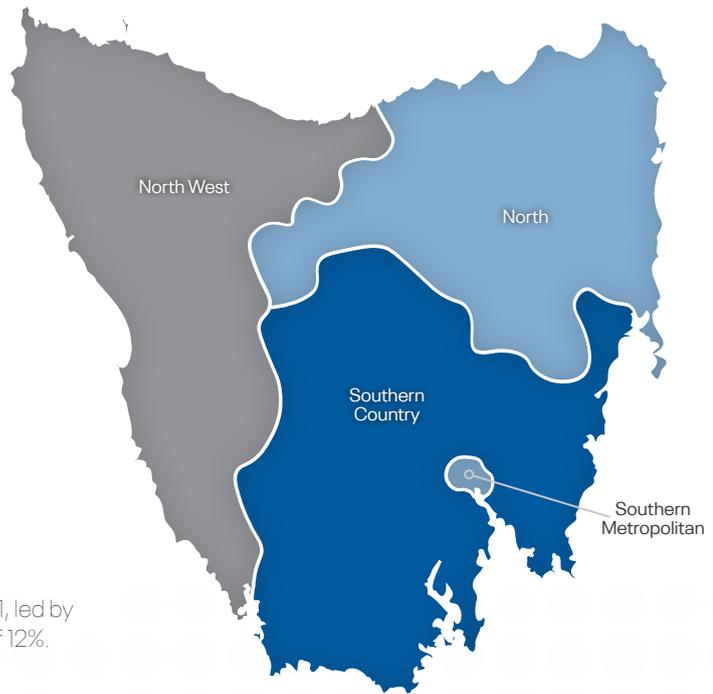
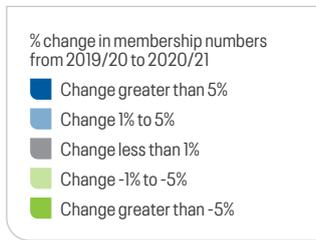
Table 22: South Australia districts

Region	2016/17	2017/18	2018/19	2019/20	2020/21	% Change	
						From 2019/20	5 yr avg
Riverland	516	520	521	454	557	22.7%	1.9%
South East	1,671	1,631	1,773	1,744	2,000	14.7%	4.6%
Mid North	1,491	1,496	1,515	1,450	1,642	13.2%	2.4%
Southern	3,427	3,380	3,305	3,078	3,443	11.9%	0.1%
Murraylands	539	534	543	556	615	10.6%	3.4%
Yorke Peninsula	1,019	974	977	961	1,027	6.9%	0.2%
Eyre Peninsula	1,081	1,051	1,008	978	1,044	6.7%	-0.9%
Metropolitan	13,074	12,534	12,731	13,090	13,680	4.5%	1.1%
Northern	914	902	827	827	804	-2.8%	-3.2%
SA total	23,732	23,022	23,200	23,138	24,812	7.2%	1.1%

Source: Golf Australia



Brand New Shanx Mini-Golf Facility - Regency Park Community Golf Course
Photo: Greenspace Management / David Brand



Tasmania

All districts in Tasmania recorded increases in 2020/21, led by the Southern Country district recording an increase of 12%.

Table 23: Tasmania districts

Region	2016/17	2017/18	2018/19	2019/20	2020/21	% Change	
						From 2019/20	5 yr avg
■ Southern Country	2,865	2,744	2,823	2,566	2,879	12.2%	0.1%
■ Southern Metropolitan	2,206	2,240	2,181	2,083	2,169	4.1%	-0.4%
■ North	3,316	3,141	3,104	3,158	3,194	1.1%	-0.9%
■ North West	2,318	2,155	2,101	2,094	2,111	0.8%	-2.3%
TAS total	10,705	10,280	10,209	9,901	10,353	4.6%	-0.8%

Source: Golf Australia

Competition rounds



11,769,416

total number of rounds played annually

increased by 12.4% in 2020/21

Total competition rounds

Reflecting the impact of the Covid-19 pandemic, there were 11.769 million competition rounds played in 2020/21, this sum representing a 12.4% increase over 2019/20. 5-year total competition rounds data is summarised in Table 24.

Table 24: Total competition rounds

State	2016/17	2017/18	2018/19	2019/20	2020/21	% Change	
						from 2019/20	5 Yr Av.
NSW	3,816,365	4,084,856	4,061,863	4,159,860	4,700,343	13.0%	5.3%
NT	39,977	41,165	45,047	41,494	48,713	17.4%	5.1%
QLD	1,808,347	1,793,023	1,861,575	1,883,675	2,116,102	12.3%	4.0%
SA	734,088	742,766	750,883	759,814	896,333	18.0%	5.1%
TAS	262,961	272,990	278,735	247,737	319,048	28.8%	5.0%
VIC	2,544,714	2,564,672	2,667,115	2,450,156	2,563,469	4.6%	0.2%
WA	955,057	956,370	973,906	932,156	1,125,408	20.7%	4.2%
Total	10,161,509	10,455,842	10,639,124	10,474,892	11,769,416	12.4%	3.7%

Source: GOLF Link, Golf Australia

Average competition rounds per member

Noting the increase in rounds played and playing members, average annual rounds played on a per member basis (those playing one round or more) increased in 2020/21 to 31.5 rounds per year. Further illustrating the length of the pandemic impact, average rounds played by members in Victoria remained below outcomes achieved prior to this time, averaging 27.2 rounds per member.

Table 25: Average competition rounds per member

State	2018/19	2019/20	2020/21	% Change
NSW	29.9	29.5	33.1	12.1%
NT	24.4	20.6	25.0	21.4%
QLD	29.5	29.0	32.3	11.6%
SA	28.9	28.3	33.2	17.1%
TAS	28.0	24.3	30.8	26.4%
VIC	28.5	25.6	27.2	6.1%
WA	30.4	28.6	34.9	22.2%
Total	29.3	28.1	31.5	12.3%

Source: GOLF Link, Golf Australia

Average competition rounds per member by age

Average competition rounds played vary significantly when measured by age cohort.

Chart 16 illustrates the trend apparent in 2020/21, with average round frequencies peaking for members aged between 70 to 79 at just over 35 rounds per member annually. Younger members by contrast have a significantly lower round frequency, with most cohorts under the age of 40 playing an average of less than 20 rounds per member.

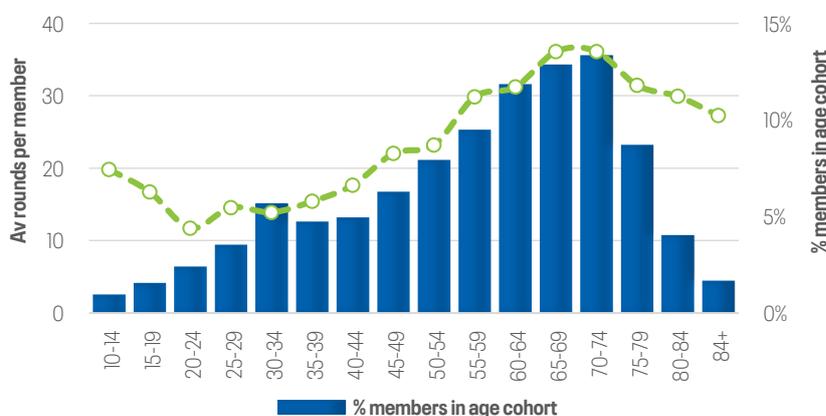


Chart 16: Average competition rounds by age cohort



Key 9-hole outcomes

With changes to the handicapping system instigated for 9-hole rounds played to be attributable to handicap movement, key outcomes for 2020/21 compared to 2019/20 are noted below:

- 876 clubs (67%) recorded 9-hole rounds in 2020/21, up by 38 clubs from 2019/20.
- A total of 517,492 9-hole rounds were played in 2020/21, an increase of 20% over 9-hole rounds played in 2019/20.
- In 2020/21 9-hole rounds accounted for 4.4% of total rounds played.
- Of those clubs playing 9-hole rounds (67% of clubs), 9-hole rounds accounted for 9% of total rounds played
- The largest increases in 9-hole play were seen in Victoria (3% to 4.3%) and Tasmania (10.4% to 10.7%)
- The 65 yr + age cohort played the highest proportion of 9-hole rounds, reflecting 5.8% of overall rounds played.

9-hole competition rounds

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



876 clubs with 9-hole rounds

9-hole rounds

517,492



+20%
2020/21 vs 2019/20



4.4%
total rounds played

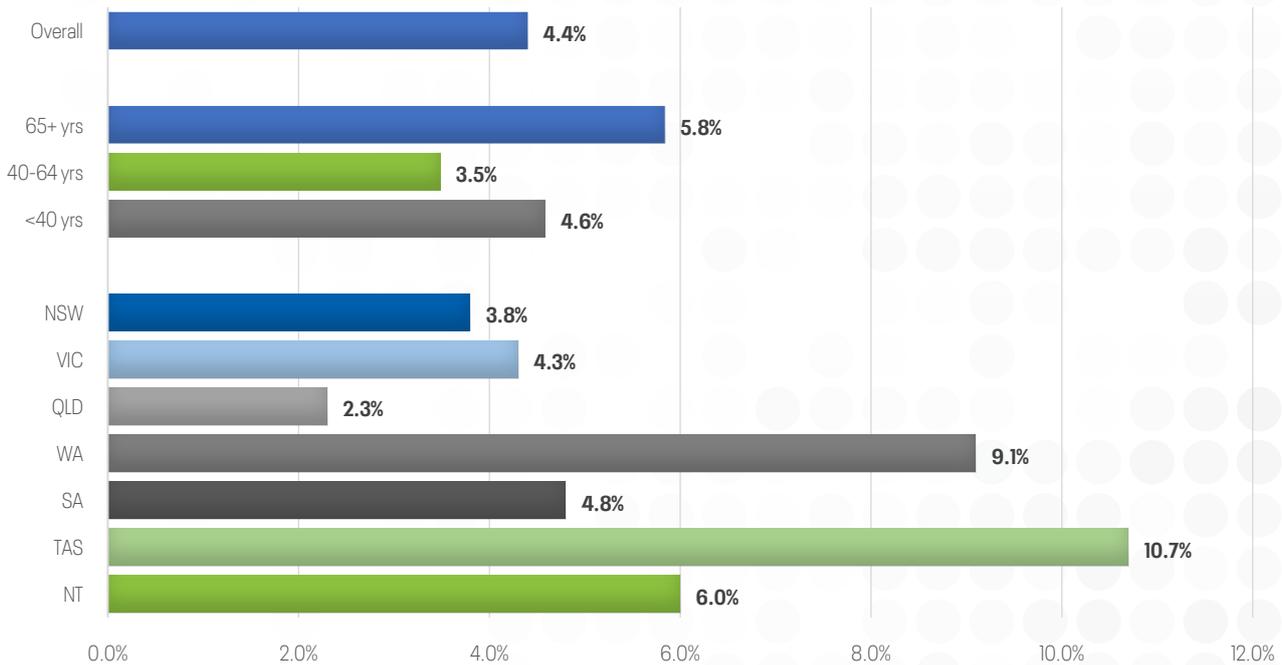


Chart 17: 9 hole rounds as % of total rounds

06

Annual Programs

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

Results achieved within these programs are detailed below.

Commentary:

- Majority of 2020/21 was impacted by restrictions on community sport / gatherings due to COVID-19. This however showed a small increase from 2019/20 from 4,623 to 4,975 (+7.6%)
- Golf Australia are reporting numbers based on disability participation through its national programs – MyGolf, MyGolf Schools and Get Into Golf. (NSW inclusive of JNJG Multisport Program)

Community Instructor program

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

Since the program's launch in 2015, there has been progressive growth in accreditations across each of the program streams. There was a renewal and restructure of the accreditation in 2020, removing the specialised program modules and enabling Community Instructors to complete just the one course to deliver Schools,

MyGolf and Get Into Golf programs, whilst maintaining a separate accreditation for teachers who deliver MyGolf solely at school. An Abilities accreditation was also introduced as a learning path to the Community Instructor accreditation late in 2020, to enable Community Instructors who have experience working with people with special needs to complete an additional accreditation to deliver

MyGolf and Get Into Golf All Abilities programs.

By the end of 2020/21, 1,348 online accreditation courses had been achieved. Of these, there are 1,293 individuals accredited as Community Instructors (with some completing several of the available courses), a growth of 411 new people into the program from the previous year.

Table 26: Community Instructor program accreditations

State	2017/18	2018/19	2019/20	2020/21	Increase
Community Instructor	539	744	646	1,027	381
MyGolf School Teacher	267	321	236	271	35
All Abilities*	-	-	-	50	50
Total	806	1,065	882	1,348	466

* Launched in October 2020. Source: Golf Australia

Table 27: Community Instructor program accreditations by state

	NSW/ACT	NT	QLD	SA	TAS	VIC	WA	TOTAL
Community Instructor	225	45	172	108	57	324	96	1,027
MyGolf School Teacher	30	5	75	28	12	99	22	271
All Abilities*	11	2	18	4	4	6	5	50
Total	266	52	265	140	73	429	123	1,348

* Launched in October 2020. Source: Golf Australia

PGA Professionals and program delivery

PGA Professionals and PGA Associates are instrumental in the delivery of all of Golf Australia's national participation programs.

Nationally, there are 1,711 PGA Professionals and 263 Associates that are available to deliver MyGolf, Schools & Get Into Golf programs. While many of these programs are delivered by PGA Members solely, at times programs can be co-delivered with the support of a Community Instructor.

In 2020/21, there were 3,730 programs delivered by PGA Professionals & PGA Associates, with 146 programs co-delivered by PGA Members and Community Instructors.

Table 28: Programs delivered by PGA Professionals/Associates

2020/21	MyGolf	Schools	Get into Golf	TOTAL
PGA delivered				
Number of programs	2,487	344	899	3,730
% of programs	84%	60%	78%	74%
PGA co-delivered with Community Instructor				
Number of programs	85	-	61	146
% of programs	3%	-	5%	4%

Source: PGA of Australia



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Disability Inclusion program

Leadership and governance

GA is determined to ensure that all Australians can engage with our sport at every level. The Golf Australia – Safe, Fair and Inclusive Sport Framework developed in 2019/20 with the assistance of Sport Australia and Oliver Thompson Consultancy.

The GA Safe, Fair and Inclusive Sport Framework demonstrates:

- Our commitment to child safe sporting environments, inclusive sport that welcomes everyone, and fair sport to protect against integrity issues.
- Policies and codes that outline peoples' rights and responsibilities.
- Complaints procedures and reporting options.
- What we do in our relevant program areas.
- Ways to get involved to promote safe, fair and inclusive sport in your club.
- Tools and resources to support you actions and goals.
- Education and training options to increase your skill and knowledge.
- Contacts and links for further assistance or support.

To access the Golf Australia Safe, Fair and Inclusive Framework, visit:

golf.org.au/integrityframework.

Education and workforce development

The PGA All Abilities Coach Accreditation, in partnership with the PGA of Australia saw a large increase in PGA Members becoming accredited through the program. A strong 20% increase in completions now has 162 PGA Professionals accredited around the country, a strategy to ensure that through the launch of MyGolf and Get into Golf All Abilities, building capacity around the country to support people with disability entering our sport and feeling supported.

2020/21 also saw the development of 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.

Participation

The effects of the COVID-19 Pandemic had an adverse effect on participation data for the 2020/21 reporting period with program and events suspended or cancelled from March 2020. This resulted in a decrease in reported participation in events however modest increases in program-based participation from 4,623 to 4,975 (+7.6%).

Golf Australia are reporting numbers based on disability participation through its national programs – MyGolf, MyGolf Schools and Get Into Golf. (NSW inclusive of JNJG Multisport Program).

Table 29: Disability participants

State	2018/19	2019/20	2020/21	Increase
NSW	2,975	856	2,597	1,741
VIC	3,957	952	1,390	438
QLD	2,398	629	441	-188
WA	953	155	165	10
SA	187	220	62	-158
TAS	159	127	300	173
NT	-	13	185	172
Total	10,629	2,952	5,140	2,188

Source: Golf Australia
Note: numbers in 2018/19 included non-national offerings



Get Into Golf - Australia's national adult introductory program



Golf Australia launched its new adult introductory program, Get Into Golf in July 2020.

2020/2021 saw a total of 313 clubs and facilities registered, with 224 actively participating, and 6,594 participants in 1,230 programs. Of the total participants, 5,564 or 84% were female. A further highlight was the participation by local communities – 29 percent of program participants were identified as being born overseas which correlates with Australian census data.

Table 30: Get Into Golf

	NSW/ACT	NT	QLD	SA	TAS	VIC	WA	TOTAL
Participants (total)	377	172	2,279	382	766	2,468	150	6,594
Female participants	368	169	1,999	305	602	1,981	140	5,564
% Female	98%	98%	88%	80%	79%	80%	93%	84%
Programs 2020/21	61	22	471	93	168	350	65	1,230
Active centres	20	8	57	27	16	87	9	224
Registered facilities	32	9	83	33	18	121	17	313

Source: Golf Australia



Other Achievements

In addition to growing participation and providing more opportunities for women, Get Into Golf was able to achieve:

- The launch of a fully integrated participation portal with MyGolf
- Development of a suite of program offerings and collateral, allowing clubs and facilities to deliver accessible and flexible 'taster' and introductory programs
- Final delivery of the \$500,000 Sport Australia Better Ageing Grant supporting delivery of 255 senior programs, the build of a discount code functionality into the participation portal and the launch of the Get Into Golf Seniors – Virtual Program.
- Securing the partnership of Australia's leading over 65s insurance specialist, APIA to the Get Into Golf Seniors program



2021

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