



National Competition Rounds Played Report

Year End December 2016

Introduction

The AGIC is pleased to present this National Competition Rounds Played Report and share with you the trends recorded in competition rounds played for the final quarter of 2016 along with the full year 2016 results.

Data Source

Industry guidance on trends within competition rounds (defined as single handicapped rounds only, excluding rounds played from non-handicapped events such as four-ball and Ambrose etc) is available via club member competition rounds as reported to GolfLink. The database used for the following analysis is of a consistent sample of the same courses, totalling approximately 1,700 facilities across the country.

Final Quarter 2016 Results

Results for the final quarter of 2016 compared to the same period of 2015 reflected a strong finish to the year. These results were driven by a strong outcomes in NSW and Queensland, both recording greater than 6% growth.

Tasmania was the only state to record negative outcomes over this period, with the Bureau of Meteorology reporting that the months of May to December for the state were the wettest on record.

Final quarter outcomes for 2016 are summarised in the following table.

State	Oct-Dec 2015	Oct-Dec 2016	% change over PY
NSW	1,346,554	1,440,855	+7.0%
VIC	983,487	998,433	+1.5%
QLD	636,579	679,133	+6.7%
WA	285,974	299,090	+4.6%
SA	257,363	260,285	+1.1%
TAS	95,923	86,814	(9.5%)
NT	14,632	16,440	+12.4%
Total	3,620,512	3,781,050	+4.4%

Source: GolfLink, Golf Australia, GBAS

Full Year 2016 Results

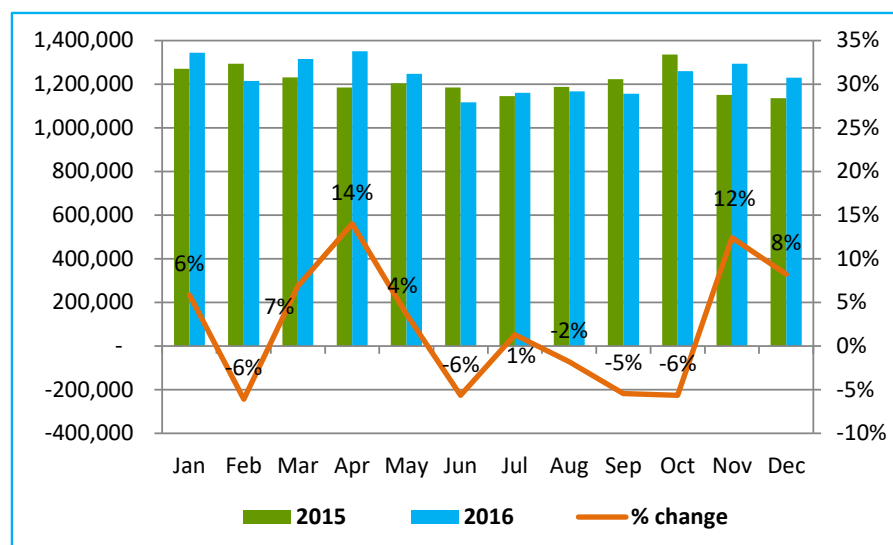
For the twelve month period to end December 2016 approximately 14.85 million rounds were recorded by GolfLink across the same facility base, a 2.1% increase over the same twelve month period in the prior year.

On a year-end basis, slightly higher growth was recorded in rounds played by male golfers, accounting for 82.3% of all rounds played, as summarised below.

Gender	Year End 2015	Year End 2016	% change
Male	11,926,154	12,222,707	+2.5%
Female	2,615,935	2,627,719	+0.5%
Total	14,542,089	14,850,426	+2.1%
% Male share	82.0%	82.3%	

Source: GolfLink, Golf Australia, GBAS

Month over month competition rounds growth was achieved in seven of the twelve monthly periods, dominated by strong outcomes in April and the final two months of the year, as illustrated below.



Source: GolfLink, Golf Australia, GBAS

Results by State

On a state basis, Queensland experienced the largest increase in rounds played for the financial year, recording 5% growth over 2015, largely due to strong outcomes from January through to June. The state of Victoria also benefitted from a less disruptive year weather-wise, with rounds growth recorded in three of the four quarters of the year.

All states with the exception of Queensland suffered through the winter months. The Bureau of Meteorology reported that the months of June and September were exceptionally wet, both second-wettest on record for their respective months, with the winter period as a whole the second-wettest on record. The wider range of May to September was also the wettest May–September on record.

Rounds played by state for the each quarter of 2016 and the movement recorded over the corresponding period in 2015 are summarised in the following table.

2016	Jan - Mar	April - June	July - Sept	Oct - Dec	Total
NSW	1,401,627	1,354,974	1,279,326	1,440,855	5,476,782
VIC	1,103,164	989,648	864,009	998,433	3,955,254
QLD	674,511	689,026	713,224	679,133	2,755,894
WA	293,348	314,065	300,410	299,090	1,206,913
SA	282,611	265,028	234,172	260,285	1,042,096
TAS	100,282	83,739	70,951	86,814	341,786
NT	17,705	18,544	19,012	16,440	71,701
Total	3,873,248	3,715,024	3,481,104	3,781,050	14,850,426
% change over PY					
NSW	(0.7%)	+8.8%	(2.4%)	+7.0%	+3.0%
VIC	+3.3%	+0.4%	(3.0%)	+1.5%	+0.7%
QLD	+8.9%	+5.0%	+1.5%	+6.7%	+5.4%
WA	(1.8%)	+1.1%	(1.3%)	+4.6%	+0.6%
SA	+0.4%	(2.6%)	(4.3%)	+1.1%	(1.3%)
TAS	+2.2%	(0.6%)	(12.7%)	(9.5%)	(4.9%)
NT	+7.9%	(2.7%)	(1.8%)	+12.4%	+3.2%
Total	+2.1%	+4.0%	(2.1%)	+4.4%	+2.1%

Source: GolfLink, Golf Australia, GBAS

Results by Capital City

Overall results recorded in the metropolitan markets were slightly softer than those recorded nationally with the collective capital cities enjoying 1.2% growth over 2015. Reflecting the Queensland result, the standout performer was Brisbane, with Sydney's numbers also in-line with wider NSW results.

The collective regional markets had most impact on 2016 results, reflecting rounds growth of 2.8% across all markets.

Metropolitan market and aggregated regional market data by quarter is summarised in the following table.

2016	Jan - Mar	April - June	July - Sept	Oct - Dec	Total
Sydney	638,867	607,056	602,994	676,746	2,525,663
Brisbane	145,656	144,216	148,759	140,726	579,357
Adelaide	185,129	164,542	146,582	172,072	668,325
Melbourne	545,806	479,610	441,108	497,115	1,963,639
Perth	186,183	188,019	180,752	190,930	745,884
Total	1,701,641	1,583,443	1,520,195	1,677,589	6,482,868
% change over PY					
Sydney	(0.8%)	+6.8%	(0.9%)	+8.9%	+3.4%
Brisbane	+12.4%	+6.0%	+2.7%	+6.5%	+6.8%
Adelaide	(0.6%)	(4.0%)	(4.5%)	+0.1%	(2.1%)
Melbourne	+2.8%	(1.1%)	+1.2%	+2.7%	+1.4%
Perth	(10.8%)	(9.5%)	(10.7%)	+5.0%	(6.9%)
Total	+0.1%	+0.9%	(1.6%)	+5.4%	+1.2%

2016	Jan - Mar	April - June	July - Sept	Oct - Dec	Total
Total Metro	1,701,641	1,583,443	1,520,195	1,677,589	6,482,868
Total Regional	2,171,607	2,131,581	1,960,909	2,103,461	8,367,558
Total	3,873,248	3,715,024	3,481,104	3,781,050	14,850,426
% change over PY					
Total Metro	+0.1%	+0.9%	(1.6%)	+5.4%	+1.2%
Total Regional	+3.7%	+6.4%	(2.4%)	+3.7%	+2.8%
Total	+2.1%	+4.0%	(2.1%)	+4.4%	+2.1%

Source: GolfLink, Golf Australia, GBAS

About the AGIC

Established in 2006, the AGIC brings together representatives from the major golf industry bodies and works as one to promote golf and industry wide initiatives.

Members of the AGIC include the Australian Golf Course Superintendents Association, Australian Ladies Professional Golf, Australian Sporting Goods Association, Golf Australia, Golf Management Australia, PGA of Australia and the Society of Australian Golf Course Architects.

