

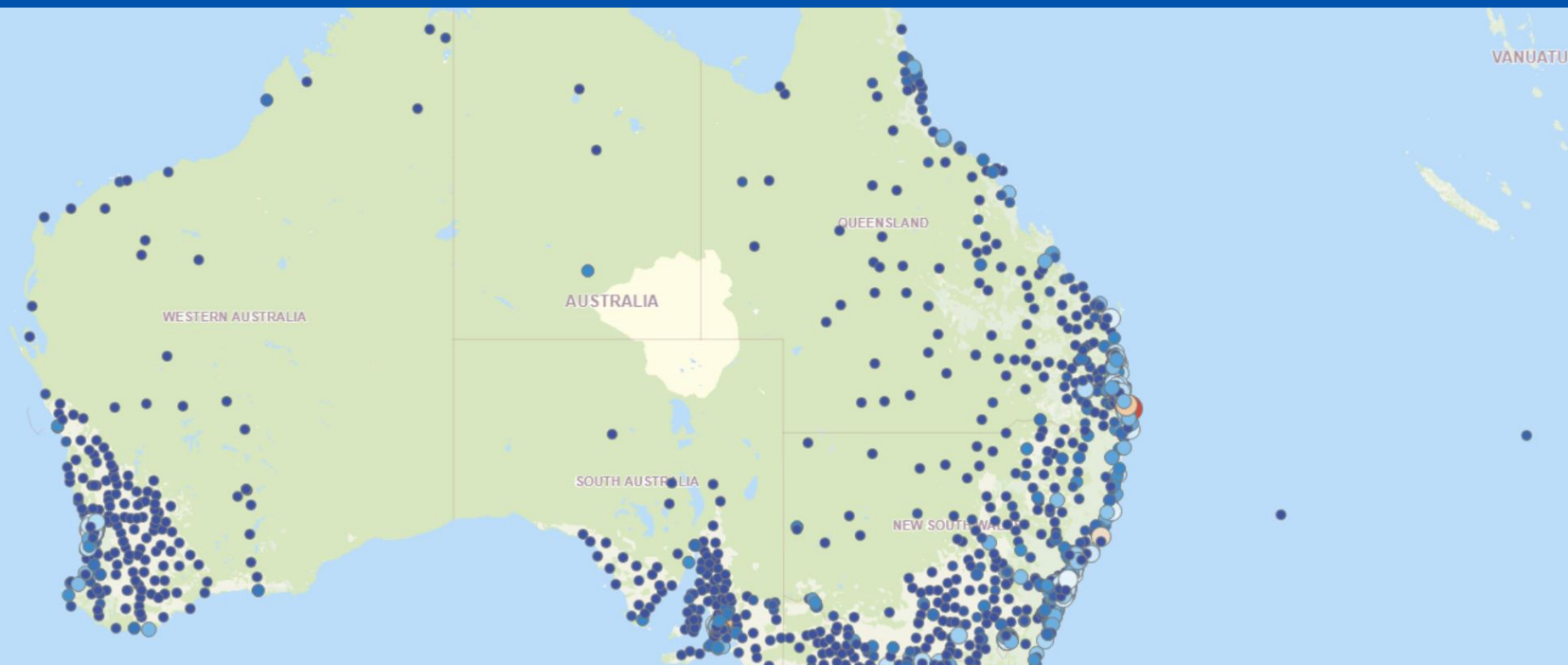


Golf Australia

Competition Rounds Report January to June 2019

Prepared for Australian Golf Industry Council
July 2019

Source: GolfLINK



Highlights of competition rounds

For the first six months of 2019, compared to the first six months of 2018:

- 302,080 golfers recorded rounds, 254 fewer than in 2018. Whilst there was an increase of 388 males, females decreased by 642.
- 2.6% more rounds were played, largely by males.
- Rounds increased across all states and territories, across metropolitan and regional areas and by males and females.
- 8.1% more nine hole rounds were played.
- 38,595 players recorded nine hole rounds, 2,184 more than in 2018.
- Competition golf was largely played by players over 60 years old.
- More analysis will be required of the trends in golfer age and in particular female golf.

Players recording rounds January to June: 2019 v 2018

Gender	2,019	2,018	Variance 2019~2018	Variance 2019~2018 #
Female	57,641	58,283	-1.1%	-642
Male	244,439	244,051	0.2%	388
Total	302,080	302,334	-0.1%	-254

- The number of females recording competition rounds declined by 642 or 1.1% The number of males increased slightly.

Competition rounds January to June: 2019 v 2018

Month	# of Rounds 2019	# of Rounds 2018	Variance 2019~2018
Jan	967,666	933,687	3.6%
Feb	872,471	825,308	5.7%
Mar	908,833	896,126	1.4%
Apr	938,372	895,370	4.8%
May	918,346	924,348	-0.6%
Jun	865,527	855,927	1.1%
Total	5,471,215	5,330,766	2.6%

- Competition rounds increased by 2.6% in the first six months of 2019 with the largest increases occurring in Jan, February and April.
- Rounds increased in five of the six months.

Competition rounds January to June by state: 2019 v 2018

State	# of Rounds 2019	# of Rounds 2018	Variance 2019~2018
WA	504,274	490,030	2.9%
NSW	2,072,172	2,044,687	1.3%
VIC	1,395,039	1,359,181	2.6%
QLD	937,728	887,730	5.6%
TAS	148,537	142,103	4.5%
SA	390,074	385,247	1.3%
NT	21,627	20,244	6.8%
OT	1,764	1,544	14.2%
Total	5,471,215	5,330,766	2.6%

- The increase of 2.6% was spread across the country with the largest increases in NT and Qld. Note: OT denotes “Other Territories” which captures Norfolk Island GC.

Competition rounds January to June by location: 2019 v 2018

Location Type	# of Rounds 2019	# of Rounds 2018	Variance 2019~2018
Metro	2,247,042	2,194,338	2.4%
Regional	3,224,173	3,136,428	2.8%
Total	5,471,215	5,330,766	2.6%

- Increases were slightly higher in regional areas than metropolitan areas.

Competition rounds January to June by gender: 2019 v 2018

Gender	# of Rounds 2019	# of Rounds 2018	Variance 2019~2018
Female	990,991	979,937	1.1%
Male	4,480,224	4,350,829	3.0%
Total	5,471,215	5,330,766	2.6%

- Growth was stronger for males at 3% compared to females at 1.1%.
- This increased males proportion of rounds played, now 81.9% of all rounds in 2019, up from 81.6%.

Nine hole competition rounds January to June: 2019 v 2018

Month	# of Rounds 2019	# of Rounds 2018	Variance 2019~2018
Jan	41,397	37,980	9.0%
Feb	41,958	38,418	9.2%
Mar	39,661	35,915	10.4%
Apr	31,067	29,686	4.7%
May	34,352	29,998	14.5%
Jun	26,400	26,721	-1.2%
Total	214,835	198,718	8.1%

- Nine hole competition rounds continue to gain popularity, increasing 8.1% and in five of the first six months of 2019.

Nine hole competition rounds January to June: 2019 v 2018

Month	# of Rounds 2019	# of Rounds 2018	Variance 2019~2018
WA	45,009	42,014	7.1%
NSW	67,144	61,451	9.3%
VIC	47,520	45,810	3.7%
QLD	20,715	17,255	20.1%
TAS	14,702	13,965	5.3%
SA	18,437	17,649	4.5%
NT	1,308	574	127.9%
Totals	214,835	198,718	8.1%

- Nine hole competition rounds increased across the country, particularly in Qld and NT.

Nine hole competition rounds comparison with total rounds January to June: 2019 v 2018

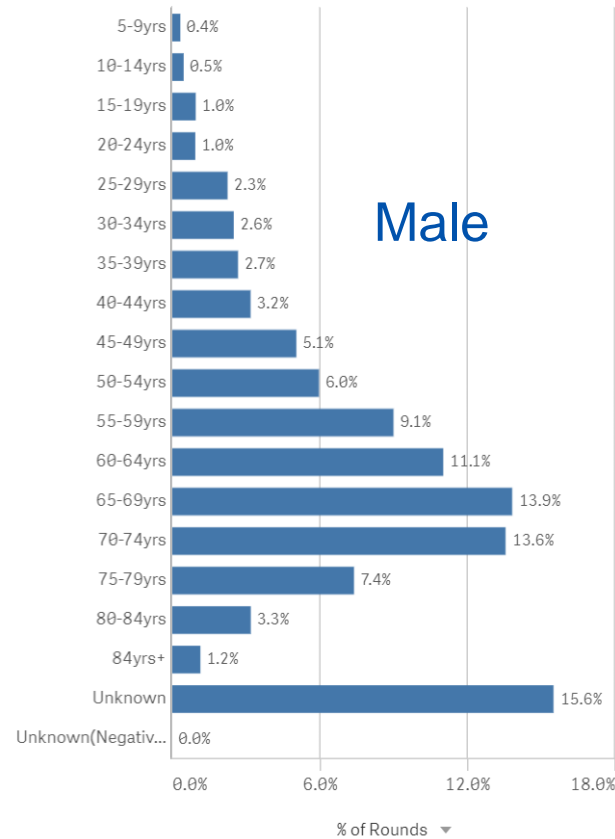
	# of Rounds 2019 (incl. 9 hole)	# of 9 hole Rounds 2019	% Rounds that are 9 hole
WA	504,274	45,009	8.9%
NSW	2,072,172	67,144	3.2%
VIC	1,395,039	47,520	3.4%
QLD	937,728	20,715	2.2%
TAS	148,537	14,702	9.9%
SA	390,074	18,437	4.7%
NT	21,627	1,308	6.0%
OT	1,764		0.0%
Total	5,471,215	214,835	3.9%

- Nine hole competition rounds, whilst growing steadily, make up only 3.9% of total rounds. The rates are highest outside of the largest states of NSW, Vic & Qld.

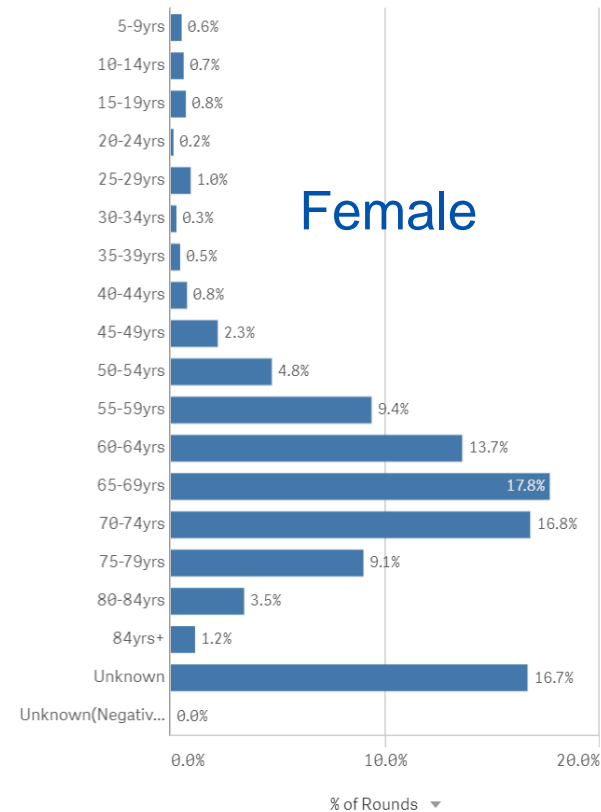
Rounds played by age & gender



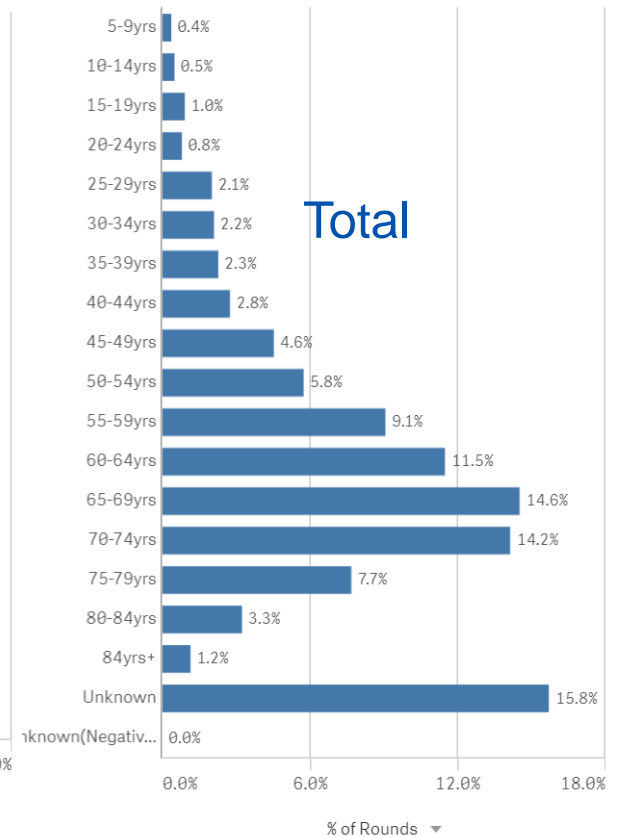
Age Bucket Analysis



Age Bucket Analysis



Age Bucket Analysis



- These charts highlight that competition golfers are largely aged 60 and over.
- Little competition golf is played by male and females under the age of 45, particularly females.

Note: No age is recorded for 16% of golfers, largely using Tier 1 software.

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