

Women's Involvement in Golf

Understanding the Industry for the Next Generation of Golf

leisure → recreation → sport



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1. EXECUTIVE SUMMARY

1.1 RATIONALE FOR THE REVIEW

This review has been undertaken by the Australian Sports Commission as part of the 'Building a Better Sport: Better Management Practices' project. The Australian Sports Commission engaged Smart Connection Company in collaboration with Henny Oldenhove to conduct the review. Golf Australia assisted with the review through facilitating access to a broad range of stakeholders and providing background information.

The aim of the review: To assess the current status of women's involvement in Australian golf and to identify opportunities for greater engagement of women in the future.

This review is directly related to the aims of the 'Building a Better Sport: Better Management Practices' framework, which aims to:

- Strengthen leadership and management capacity;
- Better understand the needs of all stakeholders and develop products and high quality services that meet those needs;
- Promote learning and information sharing across the whole of sport;
- Sustain the improvements gained with regular monitoring reviewing of performance; and
- Increase the involvement of women across all areas of the sport.

1.2 METHODOLOGY

The review comprised of information gathered from four key consultation and research sources including:

- Interviews and consultations with national, state and district associations and key golf sector representatives;
- Surveys distributed to all Australian golf facilities/clubs;
- A national forum of key golf industry representatives;
- Desk audit of national and international data and reports.

1.3 CRITICAL FINDINGS

The report identifies key findings which the authors believe are critical to understand the "state of play" of women's golf in Australia. These can be collectively categorised from the report against the following areas:

1.3.1 Participation rates in women's golf are low compared to their male counterparts and club membership has been steadily declining.

Specific critical findings include:

- Women are under-represented in Australian golf with women representing only 21% of all golf participants.
- Women's participation in golf has been declining from a high of 33% of all golf club members in 1973 to 21% in 2007 with women's participation declining in every state.
- Level of junior girls as golf members is critically low at club level (0.5%), with the lowest levels at metropolitan clubs.
- The percentage of women's involvement as golf club members is greater in regional and rural clubs than in metropolitan clubs.
- Women's participation in golf is greater as 'pay to play' players as social and corporate players (60%) than as club members (40%).

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1.3.2 There is a lack of strategic leadership within golf in Australia to address and promote a strong focus on increasing women and girl's involvement in golf.

Specific critical findings include:

- There is a lack of national leadership and co-ordination to help drive a strategic approach with member states, their clubs and industry associations to increase the involvement of women and girls in golf.
- Entry programs for women are un-coordinated and ad hoc with transition strategies to regular golf participation not well developed.
- The practices of golf clubs in terms of governance, membership categories, access (especially weekends), competition structures and involvement opportunities for women is inconsistent, un-coordinated and lacks accountability to a common set of agreed principles.
- Amalgamations of associations and districts need to consider the involvement of women in their constitutions and by-laws.
- There is no national co-ordination between associations, Golf Foundations and clubs to the development of girl's golf.
- Women are under-represented in all facets of leadership, management, coaching/teaching and volunteer positions in Australian golf.
- Clubs and volunteers require education and training to help them undertake various volunteer positions.

1.3.3 The packaging and promotion of golf to women and girls is not coordinated and responsive to their needs.

Specific critical findings include:

- The major reasons for women playing golf are social interaction, competition/challenge, regular exercise and enjoyment of the outdoor environment.
- The major barriers for women to play golf are lack of time, lack of access, cost and the perceived club culture and environment.
- Golf clubs need to become more welcoming and friendly to new women members.
- Club membership categories can limit women's access to the course and to competitions.
- Greater flexibility to competition structures for all levels of players is required.
- The profile of women's golf in the community is limited and is not representative of the range of women and girls playing golf.
- More women are working full time and for longer hours creating more demand for access to weekend golf including access to the course, competitions and weekend events for members and social/corporate players.

1.4 STRATEGIC WAY FORWARD

The review recommends three key strategic areas for action that require the industry to invest time and resources over the next ten years in order to provide increased opportunities for women's involvement in golf as players and non-players. They are:

1. **Leadership** - Provide national leadership and co-ordination to the governance, service delivery and development of golf in Australia.
2. **Raising the Standard** – Through education and training, develop the capacity of golf clubs/facilities to deliver improved competition opportunities, programs and services.
3. **Grow participation** - Increase the participation rate of women and girls in golf through targeted programs and promotions, under one common co-ordinated brand.

2. INTRODUCTION AND OVERVIEW

2.1 INTRODUCTION

The Australian Sports Commission is keen to appreciate the level of involvement and the role of women in Australian golf to explore how best to develop strategies to encourage more women to take up golf and remain in the game. This involvement encompasses women as players, volunteers, and in paid and professional roles, and seeks to increase the participation rate from a significantly low level compared to men.

The terms of reference for the review are to:

- Assess the current participation of women in Australian Golf, focusing on Golf Australia and its affiliates, including members of the Australian Golf Industry Council.
- Identify the current issues at a national, state and local level on women's involvement, particularly in the following areas:
 - Boards and committees
 - Administration / management / event management
 - Players (club members and non-club participants)
 - Coaches (both volunteer and vocational)
 - Officials (rules and match committees)
- Gain an overview of the current policies and practices of Golf Australia, State Associations and Clubs regarding women's access to leadership and participation opportunities.
- Identify services and products that have been successful in providing opportunities for greater participation of women in golf.
- Identify specific customer/participant/stakeholder segments with a focus on opportunities for future engagement.
- Identify required infrastructure, environment and facility requirements for greater involvement of women.
- Identify current motivations and expectations of junior girls in Australian golf, including an assessment of experiences within the club environment.
- Seek input from boards, administrators, players, coaches and other stakeholders through interviews, focus groups and a survey to identify key issues.
- Convene a review workshop, including representatives from Golf Australia's affiliates and key stakeholders, as well as relevant experts from sport in Australia, to examine, discuss and debate key issues and make recommendations for the future.
- Produce a written report on the review with recommendations for future opportunities for Golf Australia to better engage women including involvement pathways (athlete, coach, official, administrator, board) and resource requirements.

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2.2 BACKGROUND

Golf in Australia is primarily delivered by golf facilities/clubs with individuals playing at private, public and resort courses and at driving ranges and short course par 3 courses. Club members make up 39% of the golf playing population (ABS, 2006) with 61% playing social or 'pay to play' golf. Golf clubs offer members and 'pay to play' (green fee) players the opportunity to play socially or in club organised competitions if players have a nationally recognised golf handicap. The majority of club golfers participate in club based competitions and events only with few playing at an inter-club or district level. These club based competitions and events are generally organised and administered by club volunteers.

State Associations (and their district associations) primarily provide events and competition golf at an interclub, inter district and state level, where clubs have representative teams and/or clubs can nominate teams or individual players to participate in events. State Associations also support state junior and senior teams and players to participate at a national level in events organised by Golf Australia. State Associations provide member services such as insurance cover for registered players and assist clubs in terms of course ratings, handicap systems, volunteer coach and rules officials development.

Golf Australia is the national organisation for golf in Australia. Golf Australia conducts national level events such as the Australian Open and the Australian Masters for men and women and other national amateur events for men, women and juniors. Golf Australia establishes the policies and rules governing golf and administers the national handicapping system. Golf Australia also plays a role in the development of the sport and has recently developed a Junior Golf Framework to help develop junior golf. Its members are the state and territory golf associations that collaborate on activities, primarily events and competitions.

There are a number of other national golf organisations that form part of the golf industry and contribute to specific elements of golf. The Golf Foundations (Jack Newton, Greg Norman, Stuart Appleby and Graham Marsh) play an important role in junior golf development whilst the Professional Golfers Association (PGA) and the Australian Ladies Professional Golf Tour (ALPG) represents the professional golfers and teaching professionals in clubs. The Golf Managers Association represents the professional golf club managers and there are a number of Turf Managers/Superintendents Associations at state level. The Golf Industry also has a number of manufacturing companies that contribute to various golf events and programs.

Only recently have men and women's golf associations begun the amalgamation process, with Golf Australia becoming an amalgamated body in 2004. Associations in Queensland, South Australia, Tasmania have also amalgamated and NSW and Victoria are progressing towards amalgamation. Northern Territory has always been amalgamated and the ACT is affiliated under NSW. District Associations in several states are discussing the implications of state amalgamations and the potential for men and women's district to amalgamate in the future.

Prior to amalgamations women have successfully managed and organised women's golf in Australia for over 100 years and has a proud history of achievement. This has been achieved mainly through extensive volunteer labour on local, district, state and national committees. However when comparing women's involvement to that of men, particularly at club level, it is quite evident that women are under-represented in golf, both as players of all ages and in the broader management and governance of the sport. Whether the reasons are

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historical or the traditional barriers that women experience or perceive about golf, it is clear that actions are needed to increase opportunities for women. The benefits will not only be for women but the sport as a whole.

3. METHODOLOGY

3.1 INTRODUCTION

The key aim of the research was to provide the golf industry with the opportunity to express their views on reasons why there are not more women involved in golf and to identify good practices that associations and clubs have used to increase women's participation in the game as players and administrators. The approach also focussed on the scale of the opportunity, not just the perceived or actual barriers that are currently in the sport of golf.

The review comprised of information gathered from four key consultations and research sources, including:

- Interviews and consultations with national, state and district associations and key golf sector representatives;
- Surveys distributed to all Australian golf facilities/clubs;
- A national forum of key golf industry representatives;
- Desk audit of national and international data and reports.

3.1.1 Review Consultation

Consultations were held with associations, club representatives, district representatives, social and corporate organisers and other key individuals in Queensland, NSW, and Victoria. Telephone interviews were conducted with associations and individuals in Western Australia, South Australia and Tasmania. (A list of all those consulted is included at appendix 1.)

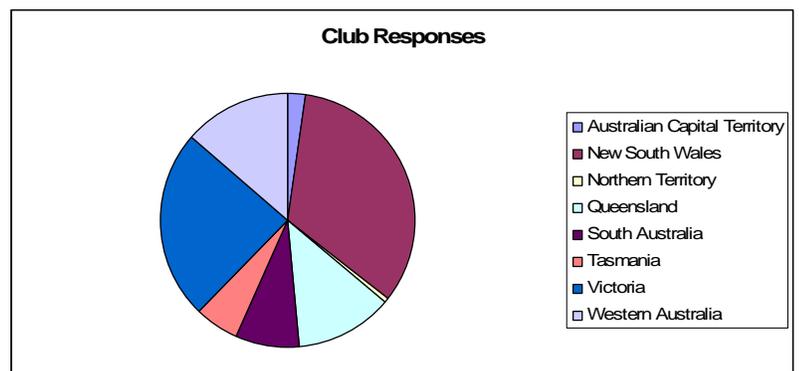
3.1.2 Review Survey

The survey was drafted with input from the ASC and Golf Australia and made available through the Smart Connection Company web site. The information about the survey was communicated to all 1,500 golf facilities through Golf Australia and through the Golf Managers Association. After a three week period, 175 responses were received, representing 12% of all golf facilities. The results from the survey provide data which is considered indicative rather than conclusive of all golf facilities.

(A sample of the review survey is provided at appendix 2.)

State breakdown of club responses

The number of responses from each state is as follows:



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3.1.3 Industry Forum

An Industry Forum was held in May 2008 to discuss the findings of the review to date, identify any gaps and discuss the key strategies and actions that would help to ensure greater participation and involvement of women in golf.

Participants represented Golf Australia, state golf associations, clubs, PGA, ALPG, Golf Manager's Association, golf manufacturers and social/corporate golf members and also included Softball Australia to provide examples of other sport's approaches to similar issues.

(A list of all participants is included at appendix 3.)

3.1.4 Review Benchmarking

The national and international reports and data analysed included the following reports:

- Industry Research, Jeff Blundon 2006 (unpublished)
- The English Ladies Golf Union, Research 2005.
- The English Ladies Golf Union Consultation Report and Strategy for Women and Girls in Golf 2006-2009.
- Women in the Golf Industry (US) – What Women Want from Golf, 2005 based on studies conducted by the PGA of America, the National Golf Foundation and the PGA Tour.
- "A Fair Way to the Fairway" Untitled report about the US LPGA .

4. WOMEN'S PARTICIPATION IN GOLF

4.1 INTRODUCTION

Accounting for approximately 51% of the national population yet only 21% of those who play golf, women have long been seen as a potential and untapped market when it comes to participation in golf in Australia. Whilst a more balanced outcome might not be realistic in the short to medium term, increased demand from the female market is a potential source of much needed demand for Australia's golf clubs and courses.

4.2 POPULATION AND PARTICIPATION IN GOLF

4.2.1 General Population Data

Golf competes for people's discretionary time with many other recreational activities, with golf coming in as the 11th most popular activity. From recent statistical research (ERASS 2007) the most popular activity (recreational/sport) past times for Australian adults (over 15) are:

Activity	Participation Rate	Activity	Participation Rate
Walking (other)	51.3%	Yoga	6.0%
Aerobics/fitness	21.3%	Running	5.9%
Swimming	18.3%	Walking (bush)	5.1%
Tennis	8.0%	Dancing	4.0%
Cycling	7.1%	Golf	2.8%
Netball	6.4%		

Australia is currently home to approximately 7.8 million women aged over 15 years. Of this number, it is estimated that approximately 258,000 or 2.8% have played at least 1 game of golf in the past year. By comparison, the male golf market is three times the size at over 800,000 golfers, accounting for approximately 13% of the male population in the same age range.

Women's Participation Rates as percentage of Population

	Population (W)	Golfers (W)	Participation % (W)
1997	6,799,500	244,500	3.6%
1998	6,830,900	242,500	3.6%
1999	6,890,200	282,500	4.1%
2000	6,989,500	265,600	3.8%
2001	7,531,200	241,000	3.2%
2002	7,686,100	276,700	3.6%
2003	7,809,100	257,700	3.3%
2004	7,950,000	222,600	2.8%

Source: Industry Research, 2006 JB

With the national female 15 + years population growing by approximately 12% over the same period, it becomes clear that female golf's 'share' of the market has not been maintained, as is evidenced by the fall in the national participation rate from a high of 4.1% in 1999 to 2.8% of the 15+ year population. By comparison, total participation in golf by men increased by 17% over the same period, with the share of market maintained at approximately 13%.

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4.2.2 Golf Participation Data

Statistics show that the number of social and non club member golfers account for over 60% of all golfers, compared to only 40% belonging to golf clubs. Of all golf club members (i.e. male and female) women have remained at 21% of total club membership (2004-2006 inclusive)

Golf Participation, members and non-members

	(ABS) golf participants	(Golf Australia) members	non-members
2004	1,250,600	460,633 (63.2%)	789,967 (36.8%)
2005	1,139,300	452,646 (60.3%)	686,654 (39.7%)
2006	1,132,000	444,573 (60.7%)	687,427 (39.3%)

Source: ERASS 2007 & Golf Australia 2008

Golf Participation, all members compared to women members

	Members	Women Members	% of Women members
2004	460,633	97,934	21%
2005	452,646	96,848	21%
2006	444,573	94,775	21%

Source: Golf Australia membership data, 2008

Critical Findings

- Women are under-represented in Australian golf with women representing only 21% of all golf participants.
- Women's participation in golf is declining.

4.3 STATE PARTICIPATION TRENDS

As population patterns naturally dictate, female golf participation in Australia is heavily centred on the eastern seaboard states, with near 80% of participants located in this area. Measurement of the participation percentage within each state therefore provides a clearer picture of female golf's 'share' in each state.

Historically, participation in golf by females has been higher in the eastern seaboard states, being almost a full percentage point higher than the other states. It is thought that this higher participation level is due to a greater number of courses, providing more opportunities to actually play golf, and more general exposure to the game via the club environment. Participation rates by state for 2004 are summarised in the table below.

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State Women's Participation Rates, 2004

State	Number women of participants	State Share	Women's Participation Rate
NSW	77,100	35%	2.9%
VIC	76,400	34%	3.8%
QLD	29,500	13%	3.5%
ACT	2,100	1%	1.7%
SA	12,600	6%	2.1%
WA	19,100	9%	2.4%
TAS	4,200	2%	2.2%
NT	1,600	1%	2.5%
Total	222,600	100%	2.8%

Source:

A review by Jeff Blundon of the data on a state basis identifies where the main losses have been experienced. Each state in Australia experienced a peak in female membership numbers in different years with some states more immediately impacted by the changing economic fortunes of the late 1980's. The following table identifies the year in which membership peaked in each state and the percentage change recorded to the period 2004.

Women's participation trends per state

State	Year of peak	Women's Membership numbers	Women's Membership numbers in 2004	Women's Membership Net Loss	% change
NSW	1994	45,115	36,631	(8,484)	(19%)
VIC	1988	32,445	28,008	(4,437)	(14%)
QLD	1993	17,729	15,428	(2,301)	(13%)
SA	1990	10,613	6,905	(3,708)	(35%)
WA	1982	9,694	7,537	(2,157)	(22%)
TAS	1991	4,290	2,980	(1,310)	(31%)
Australia	1992	114,317	97,489	(16,828)	(15%)

Source: Industry Research, 2006 (JB)

Clearly the trend of declining women's participation is evident in each state, particularly in South Australia and Tasmania. Further data from the Blundon report for Victoria and Queensland indicates that the greatest loss of women members was at a regional level with nearly all reported declines occurring in non-metropolitan areas.

Critical Finding

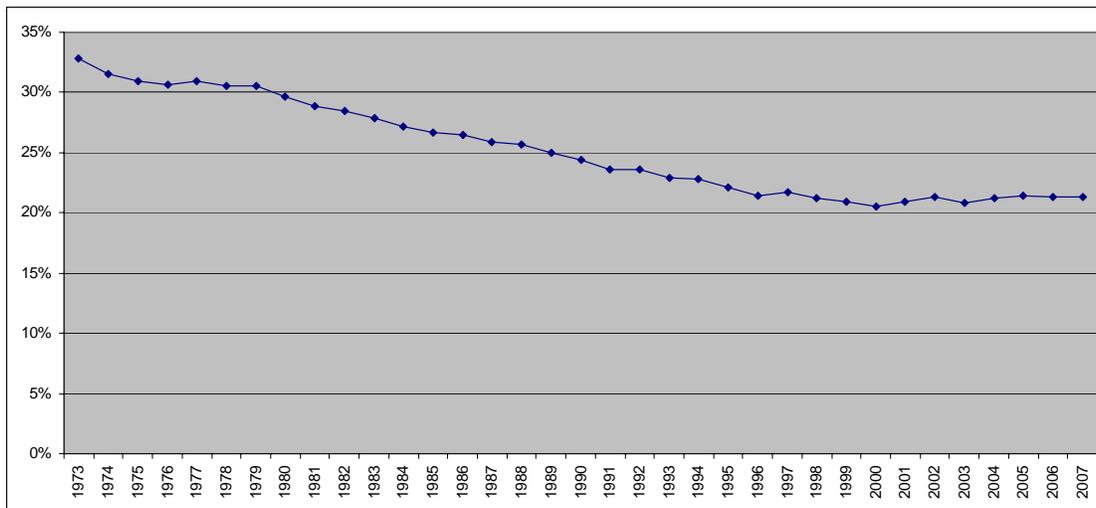
- Women's participation is declining in every state in Australia.

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4.4 CLUB PARTICIPATION TRENDS

It is not new news that golf club membership is currently experiencing declining appeal. What is relatively surprising however is that women's numbers have been declining annually since 1992, when total women's club membership numbers peaked at just over 114,000. The current reality is that in 1973, when registered club membership numbers were recorded for the first time, membership numbers were higher than they are today. Since this time there has been an average annual decline of 0.2% to the current mark of approximately 97,489 (21%) female golfers.

Women's golf participation rate as members 1973 - 2007



Source: Industry research, 2006 (JB)

The club survey indicated that clubs varied in their general participation trends with some increasing numbers and others holding or losing numbers.

Increase or decrease of general membership by location (Men and Women)

Trend	No. of responses	Metropolitan	Regional	Rural
	159	40	42	77
No reply	14	2	5	7
Increase	43	15	11	17
Decrease	39	9	12	18
Stable	63	14	14	35

Source: Review Survey

This snapshot indicates that membership patterns at each club are variable and that recruitment and retention is dealt with each club in their own way. The overall statistics however indicate a gradual decline in women's club membership.

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Results from the club survey supported these participation trends and the sample from 11% of clubs across metropolitan, regional and rural areas was consistent with the national trends. The survey also provided an indication of the levels of participation of juniors which are at a very low rate of 4.16% for boys and 0.52% for girls, again consistent with the national data.

Participation rates for women were higher at rural clubs than for men indicating the need for rural clubs to actively encourage both men and women into clubs to help maintain their viability.

This snapshot of 11% of all clubs also indicates that regional clubs have higher participation rates than metropolitan clubs for junior boys and junior girls. This may be a result of many junior golfers playing under the auspices of Golf Foundations in the various states and not registered as club members where as regional and rural clubs have limited access to these Foundations and cater for juniors at individual clubs.

Participation trends from club survey

	Location	2005	2006	2007	3 year total	% Participation	Average level of membership
Adult Men	Metro (48)	20,731	19,532	20,548	60,811	45.6%	422
	Regional (39)	16,413	15,768	16,455	48,636	36.5%	416
	Rural (71)	7,986	8,049	7,899	23,934	17.9%	112
	Total (158)	45,130	43,349	44,902	133,381		73.51%
Adult Women	Metro (48)	5,697	5,491	5,819	17,007	43%	118
	Regional (39)	4,631	4,331	4,424	13,386	33.8%	114
	Rural (71)	3,178	2,989	2,997	9,164	23.2%	43
	Total (158)	13,506	12,811	13,240	39,557		21.8%
Junior Boys	Metro (48)	804	744	781	2,329	30.8%	16
	Regional (39)	1,329	1,330	1,336	3,995	52.9%	34
	Rural (71)	566	593	69	1,228	16.3%	6
	Total (158)	2,699	2,667	2,186	7552		4.16%
Junior Girls	Metro (48)	99	98	110	307	32.5%	2
	Regional (39)	122	151	167	440	46.6%	4
	Rural (71)	69	60	69	198	20.9%	1
	Total (158)	290	309	346	945		0.52%

Source: Review Survey

Critical Findings

- Results from three data sources all confirm women's participation rates at 21% falling from 33% since 1973.
- Level of junior girls as golf members is critically low at club level (0.5%) with the lowest levels at metropolitan clubs.

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4.5 APPROACHES TO INCREASING PARTICIPATION

Many state associations and clubs are increasingly focussed on recruiting new members, including women as playing membership is dwindling at a number of clubs. Increasing participation is clearly stated in all state association's strategic plan however there is no national strategy to help drive this goal.

Most consulted identified a number of approaches that have been implemented to increase the participation of women. These included;

- The conduct of 'learn to play golf' clinics organised by clubs, districts and state associations.
- The introduction and promotion of 9 hole beginner competitions at clubs.
- The introduction of short term membership packages (3 months) to enable women to try club golf.
- The establishment of business and social associations for women to play golf without being required to join a club but still get a nationally recognised handicap.
- The establishment of Women's Golf Networks in WA, NSW and Victoria to deliver clinics, events and enable participants to gain a handicap.
- The introduction of the Golf Pass to enable women to play golf at many clubs and maintain a handicap.
- The greater encouragement of playing 9-hole competitions to reduce time commitments.
- The establishment of equipment banks to help women try golf without the cost of buying expensive equipment.

All of these approaches were aimed at increasing the participation of women. They did however rely heavily on volunteer support, support from teaching pros and access to golf courses. It was also evident that there is no national approach or structure to these initiatives that would help guide the delivery and provide support to these programs similar for instance to the national "Get on the Green" program implemented by Bowls Australia.

Critical Findings

- There is no national leadership and co-ordination to help drive a strategic approach with member states, their clubs and industry associations to increase the involvement of women and girls in golf.
- Entry programs for women are un-coordinated and ad hoc with transition strategies to regular golf participation not well developed.

5. ISSUES INFLUENCING WOMEN'S INVOLVEMENT IN GOLF

5.1 INTRODUCTION

This section on the issues influencing golf for women is based on the consultations and industry survey conducted as part of this review and supported by other Australian research and similar international research undertaken by the English Ladies Golf Union in the UK and by the US Ladies Golf Union. There are strong similarities of findings in all these studies that indicate that the issues facing golf for women in Australia is not dissimilar to the issues in the UK and the US. Learning from their approach and experience in addressing the issues provides a good benchmark for strategies that may be undertaken in Australia.

Golf participation is ageing and many golf clubs have identified the need to recruit and retain new members, men and women, in order to maintain their financial viability. Golf is also becoming less formal and traditional than in the past with many people choosing to play golf in other settings such as green fee players (pay to play), in social and business groups and associations, at driving ranges and as itinerant travellers to resort and regional courses. Increasing the involvement of women will require;

- a more modern image and approach to how golf is perceived and delivered for women
- more co-ordinated strategies for recruiting and retaining women
- greater flexibility of memberships, programs and services
- more opportunity to become involved in the governance, management and running of the sport

Many of those interviewed also identified that the traditions and values governing golf are still the bastion of an older generation and that change is occurring as the next generation takes on the mantle of governing the sport. Whilst the values of golf should not be lost, the restrictions that limit the growth of the sport, particularly for women, need to be clearly identified and removed. Whilst the next generation may bring about more positive change for women, the sport can not wait any longer. This section will highlight some of the issues raised and suggest strategies for change.

5.2 BARRIERS TO PARTICIPATION

5.2.1 THE GOLF ENVIRONMENT

The sport of golf has a wonderful history and culture and this is both its strength and possible weakness.

Many people, including women, still perceive golf to be the sport of the privileged. Golf clubs often reinforce this by such practices as having waiting lists and the need for new members to be 'approved' prior to joining. Having to pay significant joining fees in addition to annual membership fees can be daunting for many who want to start playing golf and to join a club. This is true for both women and men.

The profile of women's golf is also not as strong as that for men. Whilst efforts have been made to promote women's golf through the major televised Australian events the perception of women's golf as a sport for everyone has not yet permeated the general community.

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The review also found variances between metropolitan and regional golf facilities and the involvement of women. Generally in most regional and rural golf facilities the involvement of women as players, administrators and volunteers was higher than in metropolitan clubs. This is often a result of having to use all resources available, men and women, to help manage and run the club as volunteers and as a result of stronger family connections in the playing population.

Other influencing issues are associated with the culture and attitude towards women in some clubs, including the attitude of some women to change and to new and junior members. Stories such as women applying a strict dress code that put women off returning to golf were prevalent during the consultations. Lack of a welcoming environment was also related as a factor as new women to golf often felt it was difficult to be included into the established groups and be sufficiently knowledgeable in the rules and etiquette of the game. Some women were not supportive of junior players in 'their' competitions as they feared that they would win too much. Weekend playing women were sometimes seen by the mid week players as agitators of change that they did not support. Most of those interviewed, commented that golf clubs needed to be more welcoming and friendly to new members.

Language can also be seen as an indicator of the cultural values of golf clubs. Women are still often referred to as 'associate' members or as lady members rather than just simply members or women members as rarely will the men be called 'gentlemen'. There are even still clubs where the women's toilets and change rooms are labelled as 'associates'! The language adopted and practiced by clubs is an important factor in establishing an inclusive environment and culture for women and is important to any growth strategy.

These 'environmental' issues lead many women to simply stop playing golf or to become green fee members or join women's social and corporate networks and groups to play golf. These 'environments' are more women friendly and compete for the playing market.

Critical Findings

- Golf clubs need to become more welcoming and friendly to new women members.
- The profile of women's golf in the community is limited and is not representative of the range of women and girls playing golf.

5.2.2 SOCIAL PERCEPTIONS (Australia)

The key research findings as to why women play golf (source: Industry Research, 2006) are:

- Social interaction 76%
- Competition/challenge 66%
- Regular exercise 66%
- Scenery/fresh air 46%

Further research from the same survey supports the conclusion about the desire for social interaction, with only 8% of female golf club members indicating that they did not participate in any social activities at the club compared to 15% of men. The same survey found that almost 2 out of 5 women surveyed held significant interest in club activities compared to 1 in 5 men.

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From the industry survey and the consultations the major real or perceived barriers for women were identified as;

- Limited time to commit to golf;
- Fear of not being good enough;
- Membership categories and access to a range of competitions;
- Costs involved including fee's and playing equipment;
- Lack of access to courses on weekends;
- Strict dress code attitude;
- Lack of ability to break into the established playing group; and
- Knowledge or etiquette, golf rules and competition.

Further detailed comments received from the club surveys, state by state, are included in appendix 4.

Critical Findings

- The major reasons for women playing golf are social interaction, competition/challenge, regular exercise and enjoyment of the outdoor environment.
- The major barriers for women to play golf are lack of time, lack of access, cost and the perceived club culture and environment.

5.2.3 SOCIAL PERCEPTIONS (International)

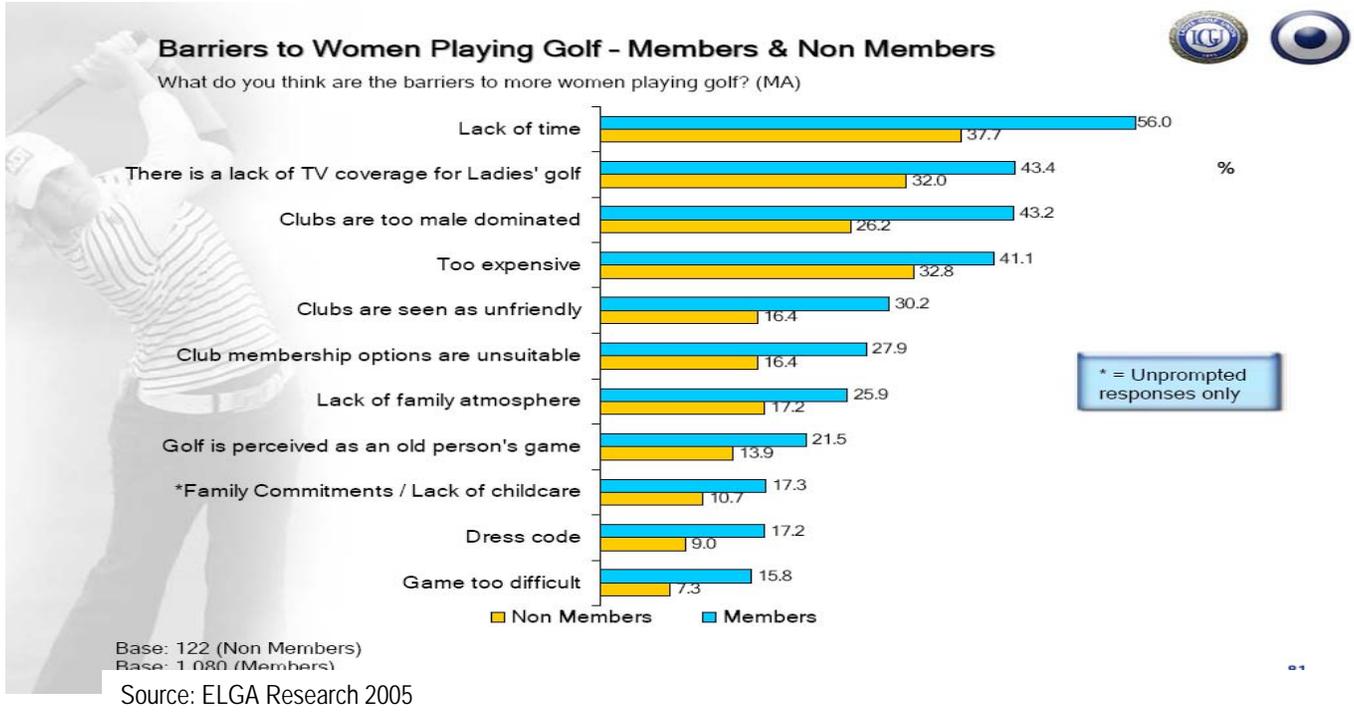
The review compared Australian results to several international studies on the involvement of women in golf from the United Kingdom and the United States. The studies included:

- The English Ladies Golf Union, Research 2005.
- The English Ladies Golf Union Consultation Report and Strategy for Women and Girls in Golf 2006-2009.
- Women in the Golf Industry (US) – What Women Want from Golf, 2005 based on studies conducted by the PGA of America, the National Golf Foundation and the PGA Tour.
- "A Fair Way to the Fairway" Untitled report about the US LPGA .

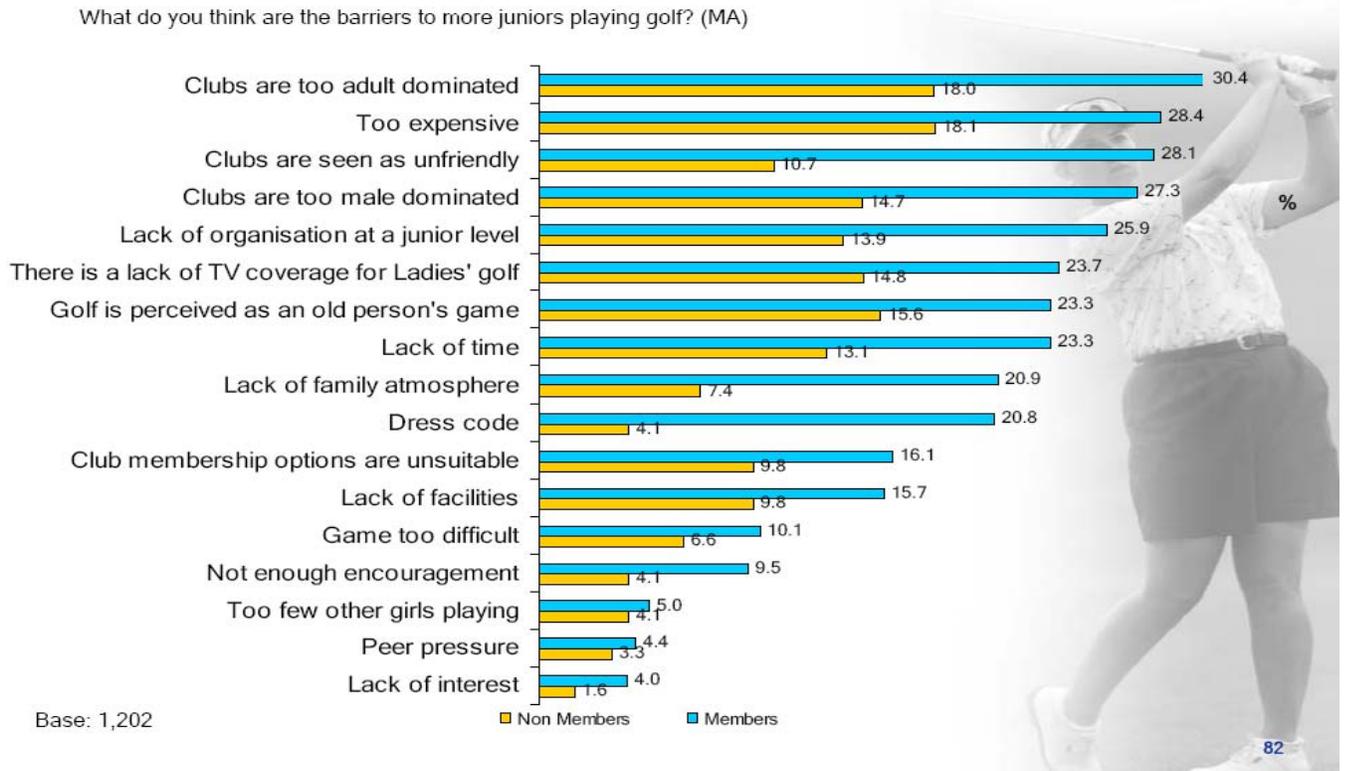
The Australian results and trends were similar to those results found in the UK and US research. In particular the rankings of issues were similar although there were differing levels of ratings given by members, non-members and by club secretaries to each of the issues.

The following graphs from the English Ladies Golf Union's review indicate the perceived barriers to golf by members, non-members and their perceptions about barriers to junior girl's golf.

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Barriers to Juniors - Lady Golfers



Source: ELGA Research 2005

Critical Finding

- The Australian environment and issues relating to women's participation in golf is similar to that of the UK and the US.

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5.2.4 STRUCTURAL BARRIERS (Membership and Competition)

Competition golf provides participants with the opportunity to gain and maintain a handicap. Once a handicap is established golfers can enter into numerous competitions whether organised by the club/district/state associations or participate in corporate and social events and enter a wide range of tournaments organised by association, resort or commercial organisations. Handicaps also provide most golfers the benchmark and motivation to improve their golf.

Access to competition is the main service provided to golfers, particularly by clubs.

Historically access to competitions has not been equitable with many women unable to play on weekends, particularly Saturdays. This practice has gradually changed due to the anti-discrimination laws but still exists to a large extent with restricted membership categories often limiting access to a wide range of competitions, particularly at weekends.

Many clubs now offer a 5, 6 or 7 day membership category to their members. The five day membership generally restricts members to accessing the course mid week although at many courses this is in effect a 4 day membership because one day is quarantined for men's competition and one for women. Where the playing field is not full, other members can usually access the course once the competition field has finished.

Six day members can usually access the course mid week and on one day on the weekend and for women this usually means a limited competition on one day or the opportunity to play in mixed events on one day only. Seven day members however should be able to access the course any day of the week. In reality though, many women cannot access both days of the weekend as one day (usually Saturday) is fully devoted to the men's competition. Where some clubs have tried to accommodate a women's competition on Saturday the playing field is usually small and provides limited competition due to the small fields. This outcome is often used to justify the restriction of women's access and to argue the limited demand for change.

One example provided from the consultations was of a woman who was a 7 day member at her club, was categorised as a 'business woman' and was therefore not able to play in the mid week women's competition as she was a 'business woman'. Having finally won the right to play, she was however not eligible to win any prizes!! These rules were established by the women's committee.

Many women also sighted the lack of inter-club or pennant golf opportunities on weekends thus restricting them from participating in this level of golf. Some weekend pennant competitions are available but are limited and rarely attract the low handicap golfers that would provide the level of competition that many of the weekend players sought. Gaining access to course time for weekend women's pennants was also sighted as a major barrier to establish these programs.

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The survey identified mixed approaches by clubs to the provision of access to competitions indicating that each club makes up its own rules.

Number of comps for women on Saturdays	Y = 68.6%, N = 30.9%
Can women in restricted social categories play on a weekend (non comp time)	Y = 82.9%, N = 9.7%
Do you provide comps for girls on Saturday	Y = 44.6%, N = 48%
Do you provide comps on Sunday for girls	Y = 45.7%, N = 48.6%

The social and business women's groups consulted sighted these issues as the major driver to establish the women's only business and social groups. These organisations provided competition opportunities for women on weekends and organised the courses to enable a sufficiently challenging level of competition. Indeed the needs of established women's golfers differ to that of recreation and social golfers where competition may not be the main driver for playing golf.

Women's participation in corporate golf is also very limited. With few women playing there is limited scope for women to use golf as a corporate networking opportunity. The independent establishment of women's corporate golf groups are catering for this need and acknowledges that business women also see the benefit of corporate networking on the golf course.

Many women also play golf outside the traditional club structure. Women participate as green fee players at one or more club, belong to business and social golf clubs organised by not for profit or commercial interests, play at resort courses and events and play golf at pitch and put courses and on driving ranges. Many of these players do not have an official handicap and are not affiliated to golf but are consumers of golf. For many women, these forms of golf participation suit their levels of interest, time commitment and competition needs.

Developing links and partnerships with these groups and individuals will require traditional golf clubs and associations to think differently about membership, membership services, competition structures and links to established golf.

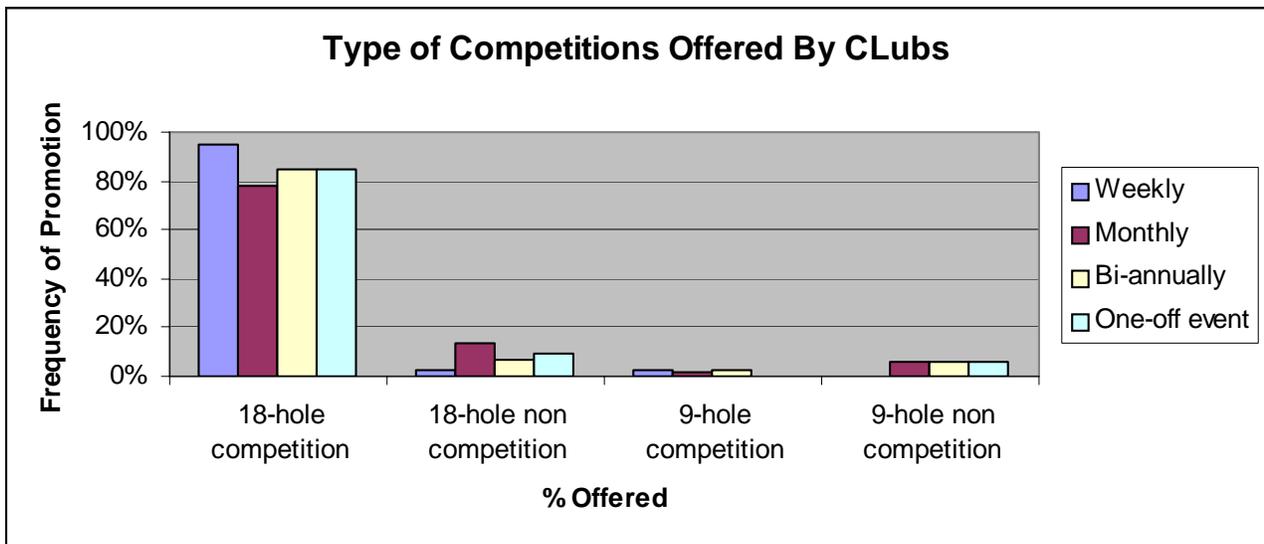
The greater use of 9-hole competitions was welcomed and widely applauded. These more time friendly formats should be more readily available to help promote women's golf competitions that enabled players to play with a handicap. The role of 9-hole competition was seen to be able to cater for:

- Time poor women, mid week, twilight and weekends
- Beginner women who would be more comfortable developing their skills in a designated 9-hole beginner competition
- Older women who could no longer play 18 holes
- Juniors after school during day light saving
- Young mothers playing mid week with child care provided

Greater flexibility in the type and timing of competitions was considered a major strategy to involve more women in competition golf.

In the Blundon Research (2006) report it states "In a number of industry surveys, women have indicated that they do not see the value of a club membership, when they can opt for a 'pay as you play' approach which allows them to play socially at a number of different courses each month and in many instances is still cheaper than a club membership."

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Source: Review Survey

Critical Findings

- Club membership categories can limit women's access to the course and to competitions.
- Greater flexibility to competition structures for all levels of players is required.

5.2.5 ECONOMIC BARRIERS

The Industry research by Blundon found that the two key economic variables that impact on the golf industry are employment and income. Any change to these two variables will impact the club industry as both impact discretionary time and income available for club membership and participation.

Employment

More women are now working more than ever before and this has put pressure on women's availability to become club members. Blundon's research showed that in the period from 1998 to 2003, the number of women golf club members had decreased by 8%, simultaneous to a 13% national increase in employed women. These factors display an almost perfect correlation of -0.92, indicating that there is a strong inverse relationship between the variables – that is, as the number of employed women increases, the number of women golf club members decreases at a roughly equivalent rate as less leisure time is now generally available.

Blundon's research also noted that in addition to increased employment levels, the average number of hours being worked is also increasing. Since 1998, the average hours worked by all employees has increased by 8.5%, with this increase effectively reducing leisure time by the same quantum. Therefore, as leisure time is increasingly reduced, and with a requirement for leisure time to remain balanced, (fitting the same number of activities into a shorter period) the activities that will most likely suffer the most are those that are inflexible in time and cost, those that are unable to be shortened and those that take the longest to do. Golf is impacted by all of these factors.

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With these economic indicators in mind, Blundon concluded that it should therefore be no surprise that there has been a recent trend toward social participation in golf as this form of participation can provide flexibility in time, cost and length of play and is therefore more adaptable to the shrinking leisure periods that today's women generally have available.

For those increasing number of women who are working full time and are still keen to play golf and maintain their golf club membership there is a growing expectation that they have access to full membership rights and access to the course similar to that available to the men members including club competitions and to inter club competitions such as pennants.

Discretionary income

The other key economic variable Blundon identified is income, specifically discretionary income as it is this income that typically funds participation in golf and other leisure activities. In measuring the period 1998 to 2005, it was found that discretionary income has fallen by approximately 4%, with this fall forcing the consumer to adjust discretionary spending habits. Again, the activities that will most likely suffer the most are those that are inflexible in time/cost, as participation in club golf has historically been.

The reality is that in many cases the current golf club product is not as attractive as it once was to the female consumer (and to some extent for men) and more organised and flexible social golf has won women away from the traditional club environment. The new product requirements and other existing barriers to entry will be further detailed later in this report.

Critical Findings

- More women are working full time and for longer hours creating more demand for access to weekend golf including access to the course, competitions and weekend events for members and social/corporate players.
- Reduced discretionary income will result in more 'pay to play' participation in golf.

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6. INVOLVEMENT IN NON-PLAYING ROLES

6.1 Volunteers and Paid Employees

The review survey sought data about the involvement of women in non-playing roles. Whilst the survey response represented 12% of all golf clubs and facilities it gives an indicative profile of women's involvement in a variety of non-playing roles. The following table provides a comparison of women in paid and voluntary roles in golf clubs and highlights some key issues.

Position	Men				Women				W % M
	Metro	Regional	Rural	Total	Metro	Regional	Rural	Total	
Facility manager	36	37	52.5	125.5	4	7	19.5	30.5	24.3%
Administration support	25	24	29.5	78.5	83.5	53	41.5	178	226.8%
Golf professional	58	45	10	113	8	9	0	17	15.0%
Pro Shop manager	25	19	5	49	9	4	2	15	30.6%
Superintendent	34	31	18	83	0	0	0	0	0.0%
Green's staff	248	142	91	481	8	1	3	12	2.5%
Other staff	159	102	129	390	177	161	143	481	123.3%
Employees total	585	400	335	1320	289.5	235	209	733.5	55.6%
Club board (excluding women's committee)	243	303	370	916	36	46.4	121	203.4	22.2%
Match/play committee (excluding women's committee)	131	146	191.5	468.5	34	40.25	73.5	147.8	31.5%
House/social committee	80	72	86.5	238.5	35	44.9	76.5	156.4	65.6%
Membership committee	61	37	63	161	25	27	46	98	60.9%
Strategic/club development committee	65	46	49	160	9	10	24	43	26.9%
Finance committee	87	79.5	61.5	228	11	8.5	22.5	42	18.4%
Green/course committee	98	121	189	408	13	17	20	50	12.3%
Junior committee	37	58.1	47	142.1	10	22.9	20	52.9	37.2%
Volunteer/amateur coaches	7	15	35	57	4	8	32	44	77.2%
Volunteer rules officials	22	48	21	91	14	16	14	44	48.4%
Volunteer other	31	188	293	512	11	85	239	335	65.4%
Volunteer / Committee total	862	1113.6	1406.5	3382.1	202	325.95	688.5	1216	36.0%

Women generally are aligned with the paid administrative and hospitality roles (226% administration and 123% of other staff) compared to management (only 24%) (Pro shop 31%) and superintendent/green staff (2.5%)

On the Volunteer aspect 22% are on committees, 66% of house/social committees and only 18.4% are women on finance committees and 22.2% of women on Boards.

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Critical Finding

- Women are under-represented in all facets of leadership, management, coaching/teaching and volunteer positions in Australian golf.

6.2 INVOLVEMENT IN DECISION MAKING

As a result of the sex discrimination laws of the late 70's women now have greater rights to be full participants in all aspects of golf. The consultations however identified that there is little consistency or commonality of how golf clubs are governed and how equitable opportunities are accessed by women. The examples alone indicate that there is no general governance principles that golf clubs must meet or common constitution models that enable clubs to provide equitable rights for all.

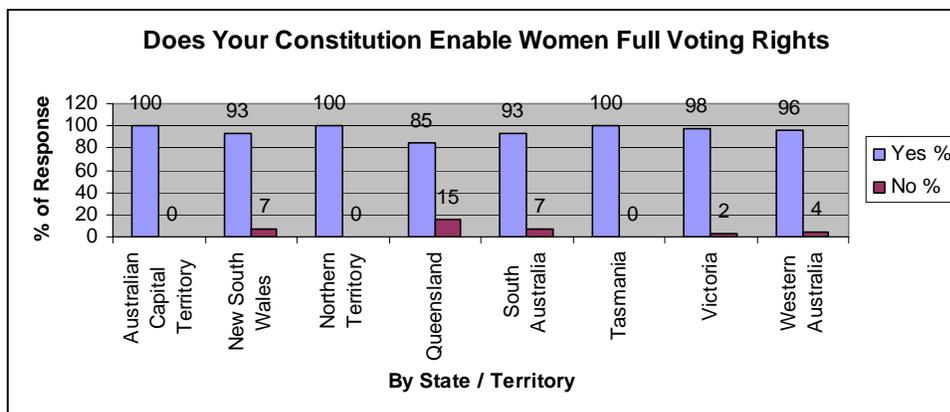
Samples of the stories heard during the consultations include:

- A club constitution that states that only 7 day members can stand for the Board and have a vote at an AGM. As there is no opportunity for women to play golf on Saturday's there is not point in being and paying for 7 day membership meaning that women can not vote and can not stand for Board positions.
- Only recently has one prestigious club changed their constitution to recognise all membership categories as members eligible to vote and stand for board positions.
- Clubs that still do not offer the 'associates' full membership rights and of course the only associates are women.

Whilst these may be a minority of clubs, they still exist and much more needs to be done to help clubs improve their governance principles. The research shows that there are not equal voting rights in clubs for women members across the country

The club survey indicated that voting rights for men and women were not equal in all cases, although it was a minority of clubs and states and territories where this was the case.

Equal Voting Rights for Women



Source: Review survey

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On the positive side, examples were provided where women are club presidents, board members and even club captains. This indicates that many clubs have changed and have moved forward, but many clubs have not yet reached this standard.

The gradual amalgamations of state and territory associations is taking place with only NSW, Victoria and Western Australia yet to formally amalgamate. Some states and territories have enshrined gender participation in the governance of the new body in their constitutions, others have not. State that have amalgamated have either formally or informally ensured that women are integral to the governance and management of the sport. The only women CEOs however are those in the women's associations of the states yet to amalgamate. Time will tell how well women are involved and represented at all levels of governance and management and needs to be monitored over time.

Most consulted thought that the amalgamation of districts was an inevitable consequence of the newly amalgamated state bodies. These groups are primarily volunteer based, have long histories and often are established over different boundaries or 'foot prints'. There is a great fear in the districts that women's committees and involvement will diminish if district functions were to be combined. Careful consideration and leadership will need to be provided to assist a smooth transition to any district amalgamations.

There is also a fear that as clubs amalgamate, functions such as match and social committees may discard the traditional women's committees and that fewer women will be involved.

One interesting story was related to how women get involved in district, state and national committees. Most women's committees and match committees operate mid week thus only enabling mid week players to be involved. Many weekend women may wish to contribute to committees but are inadvertently excluded due to the times that committees meet. Nominations to represent clubs and districts to the next level often come from the existing committees thus further preventing weekend players from becoming involved. Many consulted said that it was getting harder to get sufficient volunteers to become involved, so it seems that some outdated practices may need to change to enable more women to become involved.

Training programs may also need to be implemented to assist women (and men) undertake positions as board members, captains and handicap managers to ensure they are supported to undertake these volunteer positions.

Critical Findings

- The practices of golf clubs in terms of governance, membership categories, access (especially weekends), competition structures and involvement opportunities for women is inconsistent, un-coordinated and lacks accountability to a common set of agreed principles.
- Amalgamations of associations and districts need to consider the involvement of women in their constitutions and by-laws.
- Clubs and volunteers require education and training to help them undertake various volunteer positions.

7. INVOLVEMENT OF JUNIOR GIRLS (UNDER 18)

The results of the study show that junior girls account for only 0.5% of club membership. Whilst women represent about 21% of the playing membership of golf in Australia, they are further under-represented in the junior ranks, the number of competition players with handicaps and in the professional ranks.

Junior girls development is primarily implemented through state golf foundations and initiatives developed by state and district associations and clubs. There is currently no national junior development program in place to help drive state and foundation programs under a unifying strategy, however Golf Australia has recently developed a Junior Golf Framework to help support the growth and development of junior golf. Currently each foundation and each golf association develops its own programs and in some states where the associations are not yet amalgamated, the junior development initiatives in that state are not linked.

The state golf foundations (Jack Newton, Greg Norman, Stuart Appleby and Graham Marsh) play an important role in junior golf development. They enable juniors (up to 17 years of age) to learn the game, play competitions and enter events all within their age groups. Participants do not have to be members of clubs and can play a range of competitions from 6 to 9 to 18 holes. Programs are run during school holidays, after school and at weekends, generally on public courses.

The greatest challenge for the foundations is the transition once their participants become 18. Many girls (and boys) do not continue their golf due to other career and education commitments. One other barrier is that for many young women they can no longer play with their peers as there are insufficient numbers to run programs for the 18-23 year olds and most golf clubs have insufficient numbers to run age based competitions or pennants requiring them to play with their general membership which for many young women means playing with their 'mothers and grand mothers'!

The other challenge for junior golf development is the access to courses, particularly on the weekend and the fee structures that generally require participants to become members for a year, even though they are not likely to play for the full year. The attitude of the clubs and the teaching pros are also critical to how juniors are welcomed and treated as there are clubs that do not readily welcome juniors particularly those under 12 years of age. Public courses also have a role to play in developing juniors and helping them to consider the transition to membership at a club. Too often public courses do not see themselves as golf developers and simply provide access to golf courses.

The consultations identified a number of possible strategies to address the development of junior golf including;

- Making junior golf a 'summer sport' making greater use of the daylight saving period. Junior golf programs could be run after school using a 9-hole competition format and using Term 1 and Term 4 of the school year. A reduced club membership fee would enable juniors to belong to a club but for the summer period only or an additional club fee if they want to play during winter.
- Establishing girl's golf groups. These groups would bring together the girls from a number of clubs to form a 'girls group' that may get together at one club once a month to play competitions amongst themselves. Participating clubs would provide course access to enable the girls group to circulate around the participating club courses.
- Increasing the number of school and school holiday programs to introduce girls to golf. Club teaching professionals would be encouraged to conduct school holiday programs either at their club or in clinics. Greater linkages with the golf foundations would enable new golfers the option to join the foundation or continue at club level.

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- Establishment of district junior pennants competitions where numbers are sufficient to maintain the programs with teams entered by either clubs or the foundations.
- Development of more mixed events to enable boys and girls to establish social connections through golf.
- Development of more user friendly web sites for junior golfers showing junior girls their role models and other girl friendly aspects of golf.

Developing clear pathways is also a challenge for junior girl's golf development. Talent ID and talent development initiatives exist but again there is no national framework for these programs. The pathways are not always clear or accessible to all junior golfers. In many regional and rural clubs, juniors have limited access to teaching pros and to development programs and squads.

Critical Findings

- Junior girls are significantly under-represented in golf with only 0.5% being club members.
- There is no national co-ordination between associations, Golf Foundations and clubs to the development of girl's golf and the transition to regular club participation is poor.

8. A WAY FORWARD

8.1 WOMEN AND GOLF – 2018 VISION

This report encourages Golf Australia, in partnership with their state and territory member associations to establish a vision and strategic direction based on this review and its key strategic recommendations. The three key strategies will need to be developed into an implementation plan and should be incorporated and integrated into the strategic plans of Golf Australia and its affiliate members where relevant and appropriate.

The strategies for action and their implementation plan will require national leadership and co-ordination, in conjunction with key affiliates, to ensure a national approach is taken to address the three recommended strategies.

GOAL

“To encourage more women and girls to become involved in golf in Australia in a way that increases their participation, quality of involvement and enjoyment for lifelong participation.”

This goal is consistent with Golf Australia's:

Vision:

“Golf is a game for life where participation in the game contributes to a healthy Australian community.”

Purpose:

“Golf Australia works to develop the game of golf and grow participation in all forms at all levels.”

8.2 STRATEGIC PRIORITIES

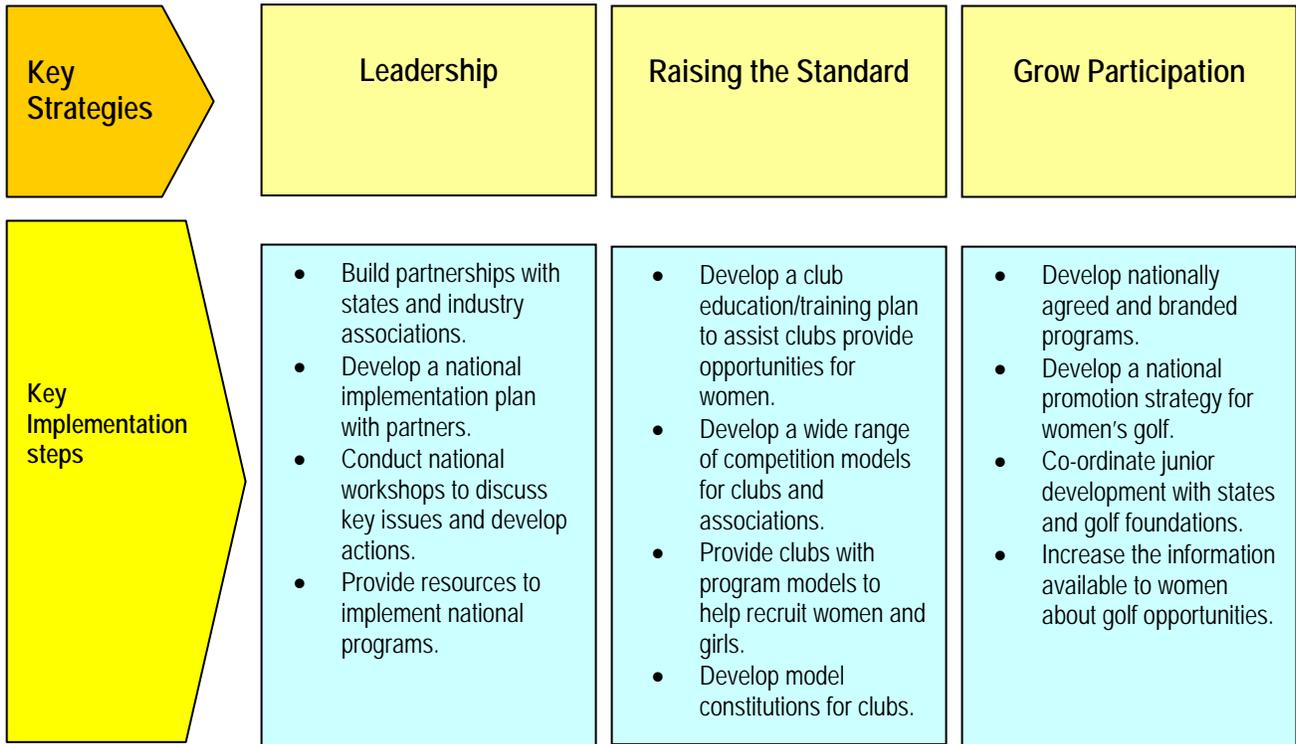
What will make the difference? – Key Priority Actions

The review recommends three key strategic areas for action that require the industry to invest time and resources over the next ten years in order to provide increased opportunities for women's involvement in golf as players and non-players. They are:

1. **Leadership** - Provide national leadership and co-ordination to the governance, service delivery and development of golf in Australia.
2. **Raising the Standard** – Through education and training, develop the capacity of golf clubs/facilities to deliver improved competition opportunities, programs and services.
3. **Grow participation** - Increase the participation rate of women and girls in golf through targeted programs and promotions, under one common co-ordinated brand.

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STRATEGIC FRAMEWORK FOR ACTION



Developing the Plan of Action

The Golf Industry Forum held as part of the review identified a number of actions and strategies that would help inform the development of an action plan for the recommended framework. The list of ideas and strategies from the forum is attached as appendix 5.

APPENDIX

1. SURVEY COMMENTS

2. SAMPLE SURVEY

3. WOMEN'S INDUSTRY GOLF FORUM PARTICIPANT LIST

4. RESULTS OF GOLF SURVEY

(Excel spreadsheet data)

5. FORUM OUTCOMES

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Appendix 1. Survey Comments

NSW

- The membership drive was aimed at men and women. The membership drive was 18mths for the cost of 12mths. Largely we picked up male members but we did get a few new Lady Members.
- Media advertising. Almost no response.
- Cromer Cygnets. Aimed at ladies that want to try golf before committing to membership. 6 lessons over 6 weeks in a group environment plus explanation of how to conduct yourself on a golf course etc. Optional 3-month extension with Friday playing rights, then
- Ran lessons for women over 6 weeks, picked up 5 members
- Reduced joining fee offer, 10 new members attracted so far.
- We gained around 50 new members by conducting a drive and lowering fees. This included some coaching. The existing ladies committee was inflexible with their rules and attitude and alienated the new members who did not come back.
- Women's pro-am, club women's open day, annual Women's Golf NSW event
- advertising for younger players but none came
- golf as a sport with local high school. organised junior group golf lessons. these programs have generated little or no participation in golf.
- Offered a coaching clinic for learners. No new players attended.
- Free golf tuition and free social games until confident. Initial response good but numbers dwindled after several weeks. Mail out to all previous members who no longer played or people who had shown interest encouraging their return. Very little response. 10
- Clinics. Some ladies join most don't.
- BEGINNERS PROGRAM: The resident Golf pro runs free Monday morning golf lessons to encourage ladies to play and then our lady golfers accompany these group on course to further their knowledge of the rules and interesting the game as well as making it a very
- Advertising in local newsletter, existing small membership willing to change or add competition day to suit newcomers. One new member for one year then she returned to work.
- advertising in local paper, charity days to promote the fact the course is there. it has not resulted in any extra female members
- We have tried advertised "Beginner Days" with no real result. We are now trying to get a group of new competition golfers to start together.
- The local Pro ran new player clinics which we then followed up with 9hole comps and then encouraged them to join in with our regular weekly Wednesday comps initially at the end of the field and not playing stroke.
- Encouraging members to join a social 9 hole comp
- we have friendship days-bring a friend Ambrose event and hold coaching clinic. we hold junior clinic during holidays
- Letter box drop in nearby towns without golf course as membership drive. Waiving of joining fee to attract members. Canberra professional visiting weekly for free tuition on school sports days and offering private lessons on same day. Youth week promotion wi
- Wrote letters to social golfers inviting them to join our summer competitions which resulted in some new members. Provided coaching for juniors by members which resulted in three junior boys. We have also lost members due to people leaving the area.

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NSW

- Lady specific lessons with Pro then encouraged to join the club - 50% success rate.
- We have a Friday and Sunday Swingers where ladies can come and play a few holes with one handicap player outside competitions. We have gained 7 handicap players over the past year.
- Ladies and Juniors clinics which have seen more women memberships and more juniors joining
- friendship days maybe one new member
- Advertising, little response. Handing out flyers at local market days ,no response. Notice in Pro shop, a little promising
- We offer prospective members two "play before you pay" games free of green fees. We also have "special" invitation days. We offer help and tuition to new members. We have had three new members during the past year and considering our membership so small,
- Few Members
- We have had specials on ladies membership. We have had charity days, Open days, Invitation Days and Fun Days.
- Market Day distribution of pamphlets, local paper ad - only ONE response!!
- Beginner group which is responsible for stabilizing our membership
- We have conducted drives through local newspapers and thru the Council Pro and have been very successful in our drive. Ladies can also play with their children or grandchildren and this has been a bonus when promoting our club.
- employed coaching from professionals for beginners and advertising in local papers to encourage players and non players which resulted in a few more members
- We run fun days during school holidays, which is generating an interest. We have picked up two juniors & three new members.
- Golf Professional gave group 5 week ladies clinics, non members were offered discount on membership if they joined at the end of clinic. Outcome- 1 new lady member.
- Increase in social members & 15 new "beginner" lady members
- Our Club has run group golf lessons both for beginners and intermediate players and also a 9 hole golf competition not requiring a handicap to encourage continued play after the lessons finish to gain experience and confidence before entering main competition
- Conduct "Bring a friend day" where non golfers can play free with a member in a two ball Ambrose. 2007 saw 3 new members join. 2008 Nil.

NT

- Golf clinics are run by the Club Professional, to encourage women to play and from this the Ladies then join the club and play in the Business ladies nine hole event held every Thursday

QLD

- Midweek social golf comps, but then the women find work and it stops.
- Have put in for grants to have a professional coach come to our club for coaching and thus hope it might encourage more women to play.
- Beginners Classes - Difficult to provide the allocated time and resources needed to "grow" these members
- Ladies Golf Clinics, Lady Open Day, Lady Charity Day, Ladies Discounts in the Pro Shop.
- Newspaper and letter box drops as well as Radio and Coaching clinics.

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QLD

- We run Ambrose competitions and in the past have held coaching clinics aimed at women these events were well attended but have not been able to stimulate more interest in the female population of the area
- We hold a Friday Birdies club for women who have been to our Adult Classes and want to learn the rules and etiquette etc before entering into the competition days.
- Quite successful & proved to be very helpful to our new members
- A Come and Try Event. We have 22 participants (male and female) and we received 2 new female members from this group.
- Young women feel alienated because there is now a generation gap due to lack of promotion in the past. There is good opportunity to correct this situation.
- Ladies beginners clinics - some ladies joined afterwards. Trial membership offer (3 months to try out) - No ladies joined after initial period.
- Coaching clinics for small fee to encourage new members with the waiving of the nomination fee to try to attract younger female participants in the club. Seniors expo held in conjunction with Qld Events - Not many responded.
- Advertising for ladies to join our Saturdays ladies group and our veterans group.

SA

- Try Golf Programme - 25 new members 9 hole membership - 20 members who would have resigned transferred to this category
- we ran a 9 hole/cart share/champagne promo- limited success
- Come and try Golf with Volunteer Coach and Loan provision of all equipment required
- Charity fund raising day eg breast cancer research. Comprising breakfast and 9 holes of golf for all participants. Try golf – organize group coaching lessons for beginners. arrange a buddy for new golfers etc.
- Come and Try Days and special membership packages which also include men. No significant increase in women numbers but better result with men.
- TRY GOLF FOR WOMEN - MOST SUCCESSFUL
- Westpac has sponsored 'Try Golf' clinics for Executive Women's Golf Network in Adelaide. Helen Sanderson, MD of EWGN, is an Australian Golf Teachers Federation Master Golf Teaching Professional and runs the clinics at The tap INN driving range. The challenge
- Radio and newspaper quite good
- Just word of mouth, encouraging new members, have a Ambrose comp on opening day

TAS

- The club lady members hold an annual Novice Day in which members are encouraged to bring a friend to the Novice Day. Those that sign up in the week following the day receive a 20% discount on their membership for that year. In 2007 we had five ladies take
- Advertisements in local paper and offers to school girls for free coaching. Mixed response. These actions with follow-up regular clinics have generated new members, and with the school girls some have started to play, but living in rural Tasmania, most schools

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TAS

- reduced fees tied to professional training and short competitions
- We have run some through the Adult education program with not much interest, however last year we did pick up a new member from the program.
- The Lady member's often ask others to come along on skills days to help& encourage them into playing & we hold a new players day once a year.
- Over recent years there have been few participants

Vic

- Special offer of \$500 plus insurance and affiliation fees for ladies to join for 14 months. The price will stay available until it is pro rata the same. This offer was available for friends / family of current members.
- we are very aware that we need to attract women & juniors. Conducted a membership drive in 2006, open to all sex's. good response from men and juniors <18 but find it hard to attract ladies. We conduct a junior women's camp each year with the WGV but just str
- We have open days for non handicap players. We also encourage those interested in golf to try a round with members to see if they like it. The golf pro is supportive and those he coaches who want to play competitions are introduced to us.
- We have introductory programs for members spouses. Maybe 1 in 20take upthe game
- Free clinics.
- mail drop and free clinics
- Come & Try Programs including free clinics and provision of refreshments. Very well attended by ladies enjoying the benefit with very small number taking up membership. Such programs are common.
- Open (Free) "Come and Try" day 109 People participated - 40% female Gained one or two members
- A few women have indicated they will have a social round. Word of mouth is the most used method of recruitment, particularly emphasizing cheap membership and Sunday competitions.
- We print out leaflets about our club and get everyone to put them on boards around their area
- joining fee discount. obtained 10 new members. come and see day.obtained3 members
- Advertisements in the local paper, local driving range
- TWO YEARS RUNNING WE HAVE SUCCESSFULLY APLIED FOR A GRANT TO PROVIDEBEGGINERS GOLF LESSONS CONDUCTED BY A GOLF PRO. NEW WOMEN MEMBERS HAVEJOINED AS A RESULT OF THIS.
- Introductory Membership for ladies - currently 57 on the books
- Reduced membership fee for 1st year of membership
- Weekly coaching clinics provided by some of our members.
- Lessons by a golf pro open to anyone, achieved only a couple of new members, due to reason previously stated, (working women)
- Introductory classes Well supported Some have joined up and some will join when children start school
- I have conducted and organized golf clinics, golf lessons, etc for women only and then I follow up and encourage the keen women. I am a low marker female and try hard to get more women out to play golf and do golf clinics for free when asked.
- Beginners and members coaching through grant from Victorian Golf Foundation. Gained 3 members.
- Advertised free women's golf clinics achieved a handful of new members.

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Vic

- Coaching Clinics run by our female teaching pro aimed at female beginners
- Junior Clinics at local schools and coaching sessions with local professionals
- Running currently, have introduced a new 1 day (Thursday) playing category at a reduced price, with complimentary clinic and snack after golf. Promo ends June 08
- letter drops Have had some response and some new membership
- Open days ran by sports focus. some interest
- we have advertised our club in the local paper ,have arranged several times for old and new players to attend clinics
- Free clinics 5 new members

ACT

- Membership drives. Advertising. Results are hard to quantify.

Appendix 2. Sample Survey

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- Q8** Within which type of government boundary is the golf facility located in?
 Metropolitan Regional Rural

Section 2: Please tell us about your membership

- Q9** How many members did you have in 2005?
- | | |
|-------------------|--|
| Adult Male | |
| Adult Female | |
| Junior Boy (U18) | |
| Junior Girl (U18) | |

- Q10** How many members did you have in 2006?
- | | |
|-------------------|--|
| Adult Male | |
| Adult Female | |
| Junior Boy (U18) | |
| Junior Girl (U18) | |

- Q11** How many members did you have in 2007?
- | | |
|-------------------|--|
| Adult Male | |
| Adult Female | |
| Junior Boy (U18) | |
| Junior Girl (U18) | |

- Q12** What type of memberships do you offer? (please tick all that apply)
- | | | | |
|--|---|---|--|
| Full (7-day) <input type="checkbox"/> | Country <input type="checkbox"/> | Younger adult category (eg under 30, 25, 21 but older than 18) <input type="checkbox"/> | Corporate <input type="checkbox"/> |
| Restricted (6-day) <input type="checkbox"/> | Social/non playing <input type="checkbox"/> | Seasonal membership (eg 3-month) <input type="checkbox"/> | Green Fee Player <input type="checkbox"/> |
| Restricted (5-day) <input type="checkbox"/> | Junior (U18) <input type="checkbox"/> | | Family membership <input type="checkbox"/> |
| Restricted (5-day including week-end) <input type="checkbox"/> | | | |
| Other (please specify) | | | |
| | | | |

What is the joining fee for your membership categories?

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Q13 Male memberships:

Full	<input type="text"/>
Restricted (6-day)	<input type="text"/>
Restricted (5-day)	<input type="text"/>
Restricted (5-day including week-end)	<input type="text"/>
Country	<input type="text"/>
Social/non playing	<input type="text"/>
Junior (U18)	<input type="text"/>
Younger Adult	<input type="text"/>
Seasonal	<input type="text"/>
Corporate	<input type="text"/>
Gree Fee player	<input type="text"/>
Family	<input type="text"/>
Other	<input type="text"/>

Q14 Female memberships:

Full:	<input type="text"/>
Restricted (6-day)	<input type="text"/>
Restricted (5-day)	<input type="text"/>
Restricted (5-day including week-end)	<input type="text"/>
Country	<input type="text"/>
Social/non playing	<input type="text"/>
Junior (U18)	<input type="text"/>
Younger Adult	<input type="text"/>
Seasonal	<input type="text"/>
Corporate	<input type="text"/>
Gree Fee player	<input type="text"/>
Family	<input type="text"/>
Other	<input type="text"/>

Q15 Do you provide competition for adult women on Saturdays?

Yes Go to Q16 No Go to Q18

Q16 Are there any restrictions on that day? (eg after a certain time of the day)

Yes No

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Q17 Please state what type of restrictions:

Q18 Can women in restricted membership categories play socially on a week-end?

Yes

No

Q19 Do you provide competitions for girls on Saturdays?

Yes

No

Go to Q22

Q20 Are there any restrictions on that day? (eg after a certain time of the day)

Yes

No

Go to Q22

Q21 Please state what type of restrictions:

Q22 Do you provide competition for girls on Sundays?

Yes

No

Go to Q25

Q23 Are there any restrictions on that day? (eg after a certain time of the day)

Yes

No

Go to Q25

Q24 Please state what type of restrictions:

Q25 Do you offer playing opportunities for non members?

Yes

No

Go to Q28

Q26 Please estimate:

Total numbers of rounds played by non members in the last year (including 9-holes)

How many of these visitors are women?

Q27 Have you experienced an increase or decrease in non-member golf in the past year?

Increase

Decrease

Stable

Q28 Does your club have a waiting list for adult men?

Yes

No

Q29 Does your club have a waiting list for adult women?

Yes

No

Q30 Does your club have a waiting list for Juniors?

Yes

No

Section 3: This section covers the management and governance of your facility

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Q31 Please indicate the number of MEN involved in the running of the facility for the following positions:

Facility manager	<input type="text"/>
Administration support	<input type="text"/>
Golf professional	<input type="text"/>
Pro Shop manager	<input type="text"/>
Superintendent	<input type="text"/>
Green's staff	<input type="text"/>
Other staff	<input type="text"/>
Club board (excluding women's committee)	<input type="text"/>
Match/play committee (excluding women's committee)	<input type="text"/>
House/social committee	<input type="text"/>
Membership committee	<input type="text"/>
Strategic/club development committee	<input type="text"/>
Finance committee	<input type="text"/>
Green/course committee	<input type="text"/>
Junior committee	<input type="text"/>
Volunteer/amateur coaches	<input type="text"/>
Volunteer rules officials	<input type="text"/>
Volunteer other	<input type="text"/>

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Q32 Please indicate the number of WOMEN involved in the running of the facility for the following positions:

Facility manager	<input type="text"/>
Administration support	<input type="text"/>
Golf professional	<input type="text"/>
Pro Shop manager	<input type="text"/>
Superintendent	<input type="text"/>
Green's staff	<input type="text"/>
Other staff	<input type="text"/>
Club board (excluding women's committee)	<input type="text"/>
Match/play committee (excluding women's committee)	<input type="text"/>
House/social committee	<input type="text"/>
Membership committee	<input type="text"/>
Strategic/club development committee	<input type="text"/>
Finance committee	<input type="text"/>
Green/course committee	<input type="text"/>
Junior committee	<input type="text"/>
Volunteer/amateur coaches	<input type="text"/>
Volunteer rules officials	<input type="text"/>
Volunteer other	<input type="text"/>

Q33 Are there any restrictions on women's memberships or differences in the description of their memberships compared to men's?

Yes

No

Go to Q35

Q34 What are they?

Q35 Does your constitution enable women to be full members?

Yes

No

Q36 Does your constitution enable women full voting rights?

Yes

No

Section 4: Finally, we would like to know more about the playing habits of women at your facility and your views on female participation in golf

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Q37 On average, how often do women at your club play golf?

	<i>Weekly</i>	<i>Monthly</i>	<i>Bi-annually</i>	<i>One-off event</i>
18-hole competition	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
18-hole non competition	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9-hole competition	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9-hole non competition	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pennant competition	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Open day	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
charity day	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q38 What do you believe are the Top 3 reasons why there are not more women playing in golf?

Q39 Do you allow mixed gender groups to play in competition?

Yes
 No
Go to Q41

Q40 Are the tee times for such groups restricted?

Yes
 No

Q41 Are there any restrictions on the composition of groups in competition? (ie juniors with adults)

Yes
 No

Q42 Are the tee times for these groups restricted?

Yes
 No

Q43 How often do you provide competition where men and women play for the same prize?

Weekly
 Rarely

Monthly
 Never

Q44 Have you conducted any membership drives or special golf programs in the past 2 years that have been aimed at encouraging women participation?

Yes
Go to Q46
 No

Q45 Why not?

Q46 Please describe them and their outcomes:

Q47 What is the name of your golf facility?

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Q48

What is the position of the person who has completed this questionnaire?

Thank you for taking the time to complete this questionnaire.

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Appendix 3. Women's Industry Golf Forum Participant List

Participant List

Name	Title	Organisation
Colin Lane	GM - National Programs	Australian Sports Commission
Anne Lenegan	Chair	Golf Australia
Tony Hallam	CEO	Golf Australia
Alison Holden	Director	Golf Australia
Warren Sevil	CEO	ALPG
Sandra Mackenzie	Director	ALPG
Frank McCarthy	Managing Director	Callaway Golf South Pacific P/L
Max Mason	President	Golf Management Australia
Greg Mills	CEO	NSW Golf Association
Carmel Smith	Vice President	Golf Queensland
Bronwen Young	CEO	Women's Golf Victoria
Peter Murray	Business Development Manager	PGA (Australia)
Michelle Howard	Member	PGA (Australia)
Rae Robinson	Women's President	Pt. Lonsdale Golf Club
Jenny Holliday	Director	Softball Australia
Jeff Blunden	Director - Business Development	Troon Golf
Jeff Blunden	Director – Business Development	Troon Golf
Kate Roffey	CEO	VicSport
Frances Crampton	CEO	Women's Golf NSW
Louise MacDonald	Golf Manager	Women's Golf Victoria
Alison Munt	Golf Australia	Golf Australia
Nick Green	Game Development Manager	Golf Australia
Sophie Keil	Manager - Women and Sport Unit	Australian Sports Commission
Henny Oldenhove	Consultant	Smart Connection Company
Martin Sheppard	Consultant	Smart Connection Company

Appendix 4. Results of Golf Survey

See attached file for collated research results.

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Appendix 5. Recommendations from the Golf Industry Forum

The consultations, industry surveys and the industry workshop identified a number of other strategies that will need to be considered over time. Under each strategic theme, they are:

Strategic Themes

Theme 1: Growth and Retention

Settings

- Conduct a national audit of all golf facilities to identify current programs and initiatives for the enhancement of women's golf.
- Developing stronger linkages and partnerships between golf settings (clubs, public courses, driving ranges, social and corporate groups)
- Increasing the level of information and knowledge as to what is available at clubs and for access to programs and competitions.
- Promotion and recruitment initiatives to focus more broadly on golf facilities and not just on clubs.

Drivers/Barriers

- Improving the attitude and capacity of clubs and golfing facilities to increase participation programs and opportunities for women and girls.
- Creating friendly and welcoming club and facility environments where women can easily integrate into established playing groups.
- Addressing the perception that golf as easily learned and the fear of "not being good enough" to play competition golf.
- Changing the playing and competition format to enable 'time poor' women to play golf eg 5, 6, 9 hole competitions.
- Greater emphasis on social golf and promoting golf as a lifestyle option.
- Greater emphasis on developing junior golf to provide lifelong skills to enable women to come back to golf later in life.

Recruitment

- Recruitment programs and strategies need to be women focussed and not generalised.
- Provide greater emphasis on transition strategies from learn to play programs to regular playing and club membership.
- Greater use of 9 hole competitions and mixed competitions.
- Greater use of mid week, twilight time and beginner competitions to help develop playing confidence.
- Provide equipment pools to assist women learn and try golf before making the financial commitment to purchase their own clubs.

Juniors

- Develop an image for girl's golf that captures the 'cool' image and social opportunities through golf.
- The need to build critical mass for junior girl numbers to enable them to play and socialise in their age group.
- Develop a cohesive and nationally co-ordinated and branded program of junior programs.
- Address the challenge of the transition from Foundation and age group programs to senior women's golf.
- Promote the importance of club & club professional support to run programs for junior girls.
- Increase the access to courses on weekends for junior programs.

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- Identify more flexible membership & fee structures to reduce focus on 12 month memberships and consider seasonal or short term memberships for juniors.

THEME 2: Golf Programs and Opportunities for All

Memberships

- Ensure flexible membership categories are available and are available equally to women and men.
- Develop more flexible membership fee structures.
- Ensure membership categories enable women to play weekday and weekend golf on an equitable basis to men.
- Collect case studies of good examples of golf club management that promote the involvement of women's golf.
- Develop membership model categories that enable women to make the transition from learn to play and social golf such as short term memberships.

Competition formats

- Provide access to a variety of competition structures including 9 and 18 hole formats.
- Provide competition opportunities for women on weekdays and weekends.
- Ensure women have the opportunity to play pennant golf on weekdays and on weekends.
- Develop 'buddy systems' to assist new players with the transition into competition golf.

Pathways

- Encourage teaching professionals to support women's development programs.
- Conduct women's coaching clinics for women to improve their golf.
- Develop linkages between all golf providers (public, social, clubs, schools) to enable people to chose various playing pathways.
- Provide access to development programs for all abilities.
- Ensure there are programs and opportunities for elite and sub-elite programs for women and girls at a regional and metropolitan level.

Handicaps

- Develop a more universally accessible handicap system to enable all golfers to gain and maintain a nationally accredited handicap.

Theme 3: Develop a Strong Accessible Brand

Image/Brand

- Develop a national brand and image for women's golf.
- Implement a national promotional campaign aimed at recruiting women and girls of all ages and all abilities.
- Promote the life long lifestyle attributes of golf.
- Promote everyday role models of the range of women playing golf.

Marketing and promotion

- Develop a national data-base to assist women find programs and opportunities at various golf facilities.

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- Develop a national brand and promotion campaign to recruit women and girls to golf.
- Increase the use of technology to reach targeted audiences of women.

Consider the Play Golf America Model (Post Code based information and 1300 women's golf)

Key Business Areas of Operational Excellence

1. RAISING STANDARDS

Club Development

- Assist clubs with education and training to recruit and develop supporting environments for women and girls.
- Consider the development of a national 'club quality assurance', model to help clubs achieve progressive standards of governance, programs and services for their members.
- Provide clubs with model constitutions, policies and management templates to assist in the running of clubs.
- Collect and disseminate case studies of good club practices derived from the national audit.

Committees and volunteers

- Improve the recruitment and retention of volunteers to ensure involvement of women.
- Provide equitable access to all women (weekday and weekend players) to committees.
- Provide training to volunteers to ensure their confidence and capacity to undertake and retain volunteer roles.
- Provide appropriate recognition for volunteers

Professional and employment

- Identify strategies to increase the employment opportunities for women (CEO's, Golf Pro's, Course Mgrs. etc)
- Recognise women involved in indirect service provision (catering, hospitality, admin etc)
- Develop career opportunities for professional women golfers beyond their playing years.

2. RUNNING THE GAME EFFICIENTLY

Governance

- Ensuring that membership & voting rights meet all legal and statutory obligations.
- Developing model constitutions that help clubs meet legal and statutory obligations.
- Increasing the number of women participating as club, state and national Board members.
- Monitor the impact of women's involvement in amalgamations (State / District / Club)

Volunteer management

- Actively recruit, identify and seek women into volunteer positions at club, district, state and national level.
- Develop sample position descriptions to assist clubs recruit women volunteers.
- Appoint a volunteer co-ordinator at club and state level to assist women undertake volunteer roles.

Training and professional development

- Provide training and development opportunities for women as
 - Board members
 - Club captains
 - Coaches
 - Rules officials

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- Tournament and event managers

3 LEADERSHIP

Golf industry

- Agreement of this strategy between Golf Australia, Australian Sports Commission, State Associations, Districts to allow support to clubs to maximise their involvement
- Gain support and involvement from key golf organisations to the strategy including the ALPG, PGA, Golf Managers Association and golf manufacturers.
- Identify partners in state and local government that own, manage and promote 'pay as you play' courses that would benefit from this strategy
- Develop and promote strong ties between 'pay as you play course' and club courses so that women can be encouraged to progress to the Club Structure

Sports Industry

- Develop partnerships with commercial organisations through out Australia that target women as their key audience that would be interested in golf, such as women's business networks, women only gyms, State government women's sports networks and peak bodies who promote sport for women (e.g. VicSport)