National Competition Rounds Played Report

Year End December 2015

Introduction

The AGIC is pleased to present this National Competition Rounds Played Report and share with you the trends recorded in competition rounds played for the final quarter of 20115 along with the full year 20115 results.

Data Source

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

Final Quarter 2015 Results

Results for the final quarter of 2015 compared to the same period of 2014 were comparably subdued, with negative trends recorded in the NSW, South Australian and Northern Territory markets. In the month of November rounds played nationally fell by 7% over 2014 with 9 weekend days within the month compared to ten weekend days in 2014.

State	Oct-Dec 2014	Oct-Dec 2015	% change over PY
NSW	1,367,409	1,346,554	(1.5%)
VIC	971,098	983,487	+1.3%
QLD	609,044	636,579	+4.5%
WA	277,590	285,974	+3.0%
SA	263,701	257,363	(2.4%)
TAS	95,379	95,923	+0.6%
NT	15,453	14,632	(5.3%)
Total	**3,599,674**	**3,620,512**	**+0.6%**

Source: GolfLink, Golf Australia, GBAS

Full Year 2015 Results

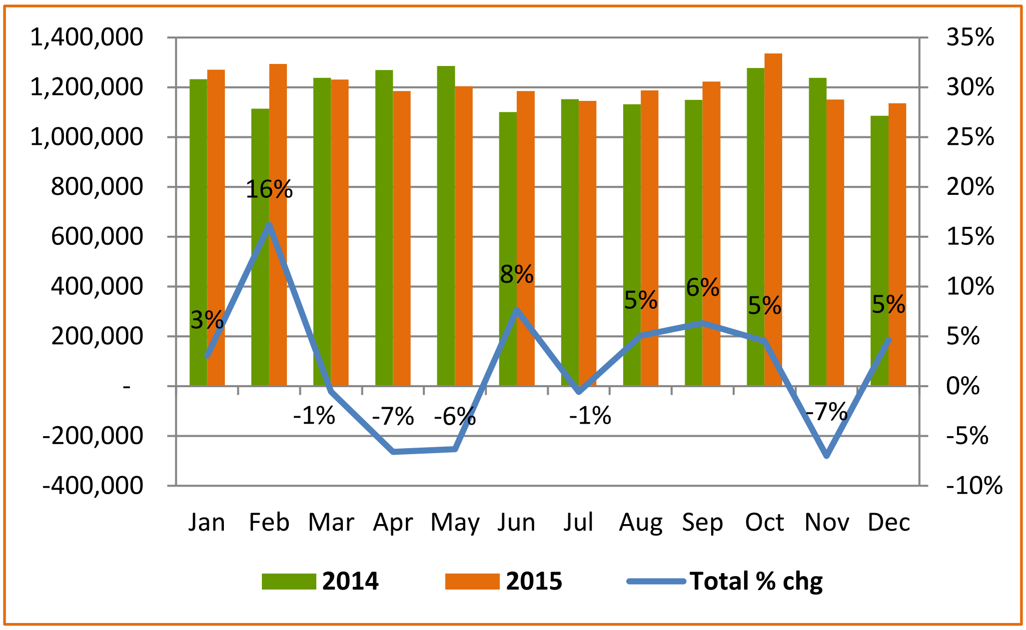
For the twelve month period to end December 2015 approximately 14.54 million rounds were recorded by GolfLink across the same facility base, a +1.9% increase over the same twelve month period in the prior year.

On a year-end basis, slightly higher growth was recorded in rounds played by male golfers, accounting for 82% of all rounds played, as summarised below.

Gender	Year End 2014	Year End 2015	% change
Male	11,678,726	11,926,154	+2.1%
Female	2,590,780	2,615,935	+1.0%
Total	**14,269,506**	**14,542,089**	**+1.9%**
% Male share	81.8%	82.0%	

Source: GolfLink, Golf Australia, GBAS

Month over month competition rounds growth was achieved in seven of the twelve monthly periods as illustrated below.



Source: GolfLink, Golf Australia, GBAS

Results by State

Western Australia experienced the largest increase in rounds played for the financial year, recording 10% growth over 2015, largely due to strong outcomes from January through to June. The state of Victoria also benefitted from a less disruptive year weather-wise, with rounds growth recorded in each quarter of the year. Conversely a negative annual outcome was recorded in NSW and SA as the autumn and winter periods delivered softer demand over the corresponding period of 2014

Rounds played by state for the each quarter of 2015 and the movement recorded over the corresponding period in 2014 are summarised in the following table.

2015	Jan - Mar	April - June	July - Sept	Oct - Dec	Total
NSW	1,412,181	1,244,857	1,311,380	1,346,554	**5,314,972**
VIC	1,067,888	985,673	891,132	983,487	**3,928,180**
QLD	619,161	656,172	702,630	636,579	**2,614,542**
WA	298,761	310,562	304,493	285,974	**1,199,790**
SA	281,487	272,186	244,642	257,363	**1,055,678**
TAS	98,092	84,211	81,235	95,923	**359,461**
NT	16,415	19,050	19,369	14,632	**69,466**
Total	**3,793,985**	**3,572,711**	**3,554,881**	**3,620,512**	**14,542,089**
% change over PY					
NSW	+4.4%	(9.0%)	+2.6%	(1.5%)	**(1.0%)**
VIC	+8.7%	+4.6%	+1.9%	+1.3%	**+4.2%**
QLD	(1.8%)	(4.0%)	+5.5%	+4.5%	**+1.0%**
WA	+12.8%	+19.0%	+13.4%	+3.0%	**+11.9%**
SA	+13.0%	(8.4%)	(3.6%)	(2.4%)	**(0.8%)**
TAS	+8.4%	(0.2%)	+12.8%	+0.6%	**+5.0%**
NT	+25.3%	+8.6%	+0.4%	(5.3%)	**+6.2%**
Total	**+5.9%**	**(2.2%)**	**+3.6%**	**+0.6%**	**+1.9%**

Source: GolfLink, Golf Australia, GBAS

AGIC Australian Golf Industry Council

Results by Capital City

Stronger results were recorded in the metropolitan markets than those recorded nationally with the collective capital cities enjoying 3.6% growth over 2014. Standout performers were the Perth, Adelaide and Melbourne markets, with +13.9%, 6.9% and +4.8% rounds growth respectively recorded for these markets.

2015	Jan - Mar	April - June	July - Sept	Oct - Dec	Total
Sydney	644,030	568,400	608,499	621,715	2,442,644
Brisbane	129,550	136,094	144,833	132,194	542,671
Adelaide	186,199	171,311	153,437	171,905	682,852
Melbourne	530,863	485,076	436,086	484,030	1,936,055
Perth	208,832	207,762	202,334	181,831	800,759
Total	**1,699,474**	**1,568,643**	**1,545,189**	**1,591,675**	**6,404,981**
% change over PY					
Sydney	+3.5%	(7.9%)	+7.5%	(1.1%)	+0.3%
Brisbane	(7.8%)	(7.5%)	+1.6%	+1.0%	(3.3%)
Adelaide	+14.1%	+7.6%	+7.9%	(1.4%)	+6.9%
Melbourne	+9.3%	+6.5%	+0.6%	+2.5%	+4.8%
Perth	+20.1%	+8.9%	+25.8%	+2.4%	+13.9%
Total	**+7.2%**	**(0.1%)**	**+6.9%**	**+0.5%**	**+3.6%**

2015	Jan - Mar	April - June	July - Sept	Oct - Dec	Total
Total Metro	1,699,474	1,568,643	1,545,189	1,591,675	6,404,981
Total Regional	2,094,511	2,004,068	2,009,692	2,028,837	8,137,108
Total	**3,793,985**	**3,572,711**	**3,554,881**	**3,620,512**	**14,542,089**
% change over PY					
Total Metro	+7.2%	(0.1%)	+6.9%	+0.5%	+3.6%
Total Regional	+4.8%	(3.9%)	+1.2%	+0.7%	+0.6%
Total	**+5.9%**	**(2.2%)**	**+3.6%**	**+0.6%**	**+1.9%**

Source: GolfLink, Golf Australia, GBAS

About the AGIC

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

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