

NATIONAL COMPETITION ROUNDS REPORT

Year Ended December 2014

A report for the Australian Golf Industry

Published February 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 2014 along with the full year 2014 results.

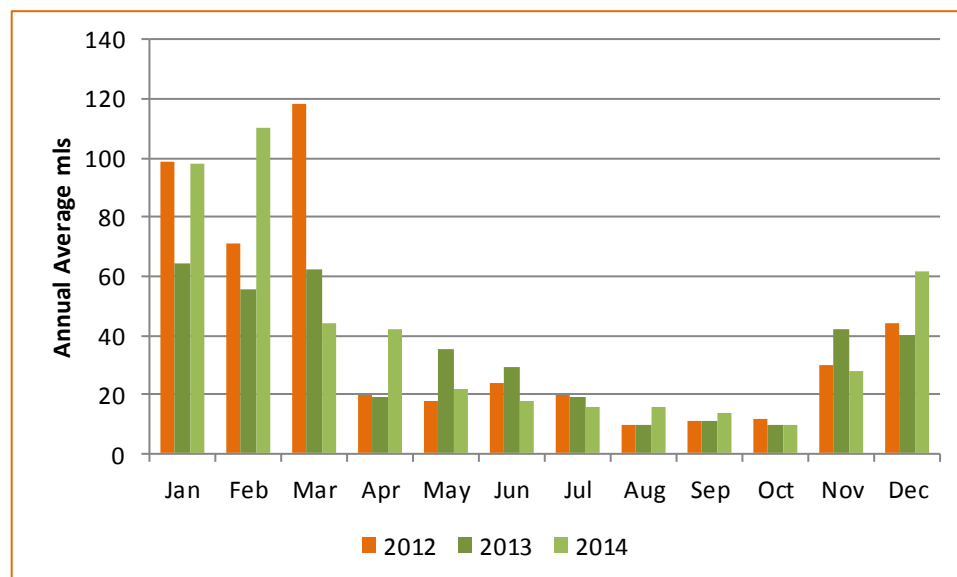
Data Source

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 1,730 clubs across the country.

2014 National Rainfall Summary

The Bureau of Meteorology's (BOM) Annual National Climate Statement 2014 ("the Statement") stated that the Australian mean rainfall total for 2014 was 478 mm, 13 mm above the average of 465 mm, placing 2014 near the median or mid-point of historical observations.

Across the year, after the wet two month period that started 2014, on a month by month basis average monthly rainfall across Australia was generally lower than 2013 with the exception of the last month of the year.

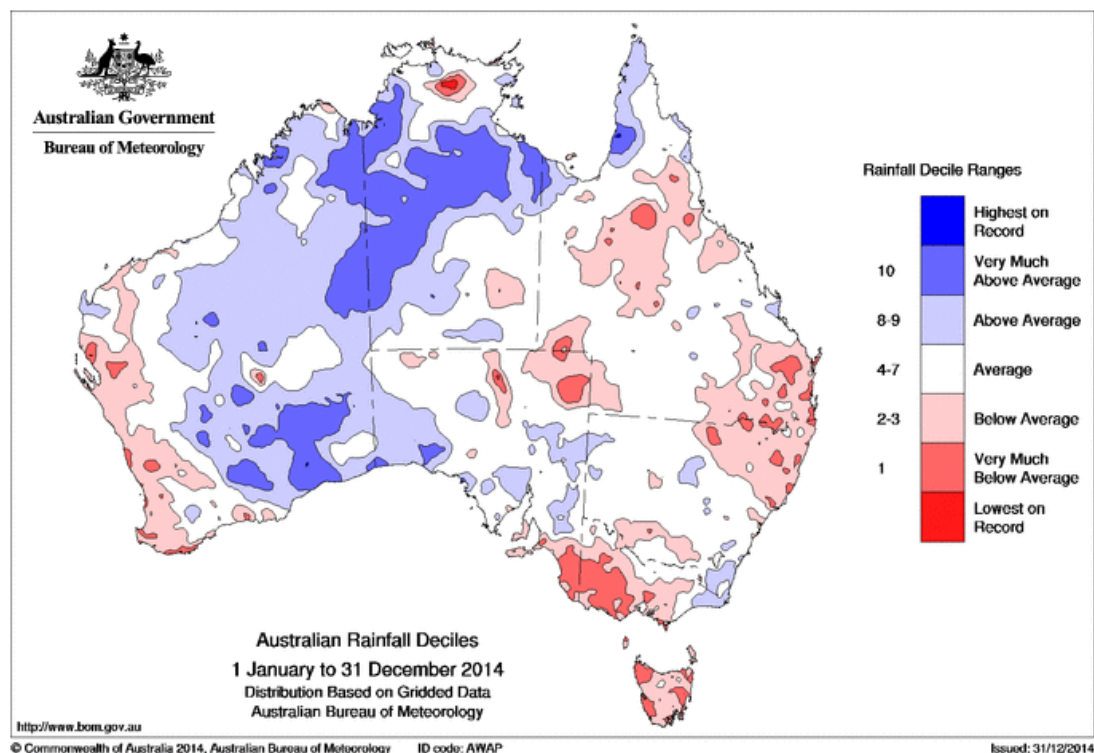


Source: Bureau of Meteorology, AGIC, GBAS

Whilst overall outcomes were in line with historical averages, the location of rainfall is key to determining potential rounds impact.

The BOM Statement noted *... "Annual rainfall was above average across far north Queensland, through the central and western Northern Territory, central to eastern Western Australia and parts of South Australia. Rainfall was below to very much below average across the South West Land Division and coastal Gascoyne in Western Australia, the majority of Victoria, southeast South Australia, all of Tasmania and a large area covering northeast New South Wales and southeast Queensland..."*

The following map illustrates the national rainfall patterns outlining that there was less than average rainfall across all of the key population centres.



Source: Bureau of Meteorology

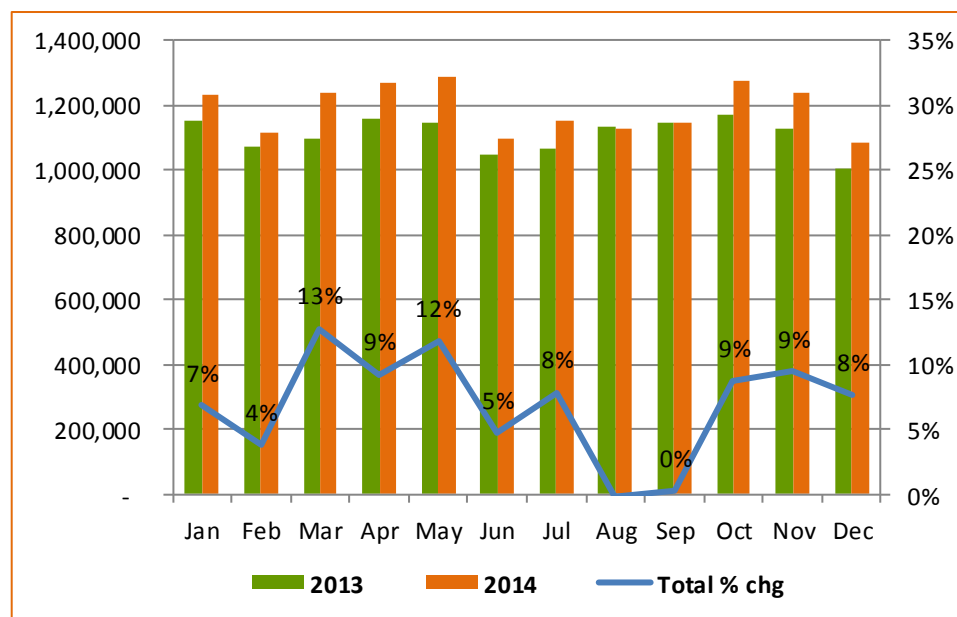
Year End 2014 Results

For the twelve month period to end December 2014 approximately 14.3 million rounds were recorded by GolfLink across the same facility base, a +7.2% increase over calendar year 2013. 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	Year End	% change
	Dec 2013	Dec 2014	
Male	10,898,945	11,709,938	+7.4%
Female	2,441,871	2,592,373	+6.2%
Total	13,340,816	14,302,311	+7.2%
% Male share	81.7%	81.9%	

Source: GolfLink, Golf Australia, GBAS

Month over month competition rounds growth was achieved for all months of the year through to November, as illustrated below.



Source: GolfLink, Golf Australia, GBAS

Results by State

With a generally drier continent, particularly in the key population centres, growth was evident across all states through 2014. The state of Queensland experienced the largest increase in rounds played for the year, recording approximately 13% growth over 2013, largely due to an exceptional strong 1st quarter. The states of Victoria and South Australia were the only other two states to record growth in all four quarters of the year.

Rounds played by State for the each quarter of 2014 and the movement recorded over the corresponding period in 2013 are summarised in the following table.

2014	Jan - Mar	April - June	July - Sept	Oct - Dec	Total
NSW	1,353,095	1,368,143	1,277,650	1,367,409	5,366,297
VIC	994,855	942,282	874,896	971,098	3,783,131
QLD	631,402	683,804	665,803	609,044	2,590,053
WA	272,429	269,175	268,599	277,590	1,087,793
SA	260,976	288,947	253,821	263,701	1,067,445
TAS	90,459	84,376	71,994	95,379	342,208
NT	13,096	17,546	19,289	15,453	65,384
Total	3,616,312	3,654,273	3,432,052	3,599,674	14,302,311
% change over PY					
NSW	+9.9%	+12.8%	(2.5%)	+6.0%	+6.4%
VIC	+1.6%	+3.3%	+6.7%	+13.2%	+6.0%
QLD	+29.8%	+15.3%	+4.6%	+5.0%	+12.8%
WA	+3.8%	(6.8%)	+1.0%	+8.2%	+1.3%
SA	+2.4%	+14.6%	+11.1%	+12.1%	+10.0%
TAS	(3.7%)	(0.9%)	+6.6%	+20.5%	+5.0%
NT	(8.5%)	+2.6%	+15.9%	+16.8%	+6.7%
Total	+8.9%	+8.7%	+2.6%	+8.7%	+7.2%

Source: GolfLink, Golf Australia, GBAS

Results by Capital City

The national result of +7.2% was reasonably consistent across the metropolitan and regional market, with +6.2% and +8.0% rounds growth respectively recorded for these markets. Consistent with the wider Queensland result, the Brisbane market, accounting for approximately one quarter of all rounds played in the state, generated double digit gains. All other markets approximated the metropolitan average.

2014	Jan - Mar	April - June	July - Sept	Oct - Dec	Total
Sydney	620,615	616,997	566,195	628,923	2,432,730
Melbourne	486,503	455,360	433,517	472,321	1,847,701
Brisbane	140,529	147,195	142,586	130,889	561,199
Perth	173,845	190,760	160,789	177,574	702,968
Adelaide	175,149	159,184	142,251	174,295	650,879
Total	1,596,641	1,569,496	1,445,338	1,584,002	6,195,477
<u>% change over PY</u>					
Sydney	+8.5%	+15.2%	(5.7%)	+8.2%	+6.2%
Melbourne	(0.6%)	+1.7%	+6.5%	+10.4%	+4.3%
Brisbane	+34.3%	+17.8%	+5.3%	+5.5%	+14.7%
Perth	+1.3%	+9.3%	+1.9%	+6.4%	+4.8%
Adelaide	+5.7%	+4.5%	+2.4%	+12.8%	+6.4%
Total	+6.2%	+9.4%	+0.4%	+8.9%	+6.2%

2014	Jan - Mar	April - June	July - Sept	Oct - Dec	Total
Total Metro	1,596,641	1,569,496	1,445,338	1,584,002	6,195,477
Total Regional	2,019,671	2,084,777	1,986,714	2,015,672	8,106,834
Total	3,616,312	3,654,273	3,432,052	3,599,674	14,302,311
<u>% change over PY</u>					
Total Metro	+6.2%	+9.4%	+0.4%	+8.9%	+6.2%
Total Regional	+11.1%	+8.3%	+4.2%	+8.5%	+8.0%
Total	+8.9%	+8.7%	+2.6%	+8.7%	+7.2%

Source: GolfLink, Golf Australia, GBAS

Results by Golf District

With a sample set of 1,760 clubs representing 93% of total annual competition rounds played in 2014 (as outlined earlier in this report), detailed tables follow which outline results by state for each GolfLink district.

Competition Rounds Played – By State by District

Association	District	Clubs	2013	2014	Change	% change
NSW	ACT MONARO	25	299,785	320,613	20,828	7%
	BLUE MOUNTAINS	11	61,818	65,766	3,948	6%
	CENTRAL COAST	11	260,812	285,012	24,200	9%
	CENTRAL NORTH	13	77,233	84,040	6,807	9%
	CENTRAL WESTERN	12	53,609	53,662	53	0%
	FAR SOUTH COAST	12	119,285	125,155	5,870	5%
	HUNTER RIVER	18	104,684	119,022	14,338	14%
	ILLAWARRA	23	299,637	327,267	27,630	9%
	LACHLAN VALLEY	13	16,766	16,672	(94)	-1%
	LOWER NORTH COAST	13	170,097	177,738	7,641	4%
	Metro NSW	92	2,029,588	2,191,009	161,421	8%
	MID NORTH COAST	14	120,609	134,563	13,954	12%
	MURRAY	13	132,400	146,456	14,056	11%
	NEW ENGLAND	9	19,260	21,835	2,575	13%
	NEWCASTLE	20	295,346	315,147	19,801	7%
	NORTH WEST	8	17,680	19,623	1,943	11%
	NORTHERN RIVERS	19	275,581	326,627	51,046	19%
	NSW GOLF ACCESS	3	28,509	31,075	2,566	9%
	RIVERINA	20	47,634	49,491	1,857	4%
	SOUTH WEST	14	22,512	22,613	101	0%
WESTERN	24	40,037	39,005	(1,032)	-3%	
WESTERN RIVERINA	14	31,587	32,922	1,335	4%	
NT	NORTHERN TERRITORY	11	55,647	58,069	2,422	4%
QLD	CENTRAL HIGHLANDS	9	20,878	24,186	3,308	16%
	CENTRAL QUEENSLAND	19	77,339	84,943	7,604	10%
	CENTRAL WESTERN	8	4,191	4,488	297	7%
	DARLING DOWNS	21	87,265	101,600	14,335	16%
	FAR NORTH QUEENSLAND	22	98,734	104,013	5,279	5%
	Gold COAST	25	405,723	475,541	69,818	17%
	GOLF ACCESS QLD	20	27,359	29,941	2,582	9%
	Metro Qld	18	433,927	504,701	70,774	16%
	MORETON	11	74,004	87,306	13,302	18%
	NORTH QUEENSLAND	19	124,538	133,431	8,893	7%
	NORTH WEST QUEENSLAND	7	4,780	5,370	590	12%
	SOUTH EAST QUEENSLAND	13	169,012	209,043	40,031	24%
	SOUTH WEST QUEENSLAND	21	12,568	14,643	2,075	17%
	SUNSHINE COAST	34	435,411	508,074	72,663	17%
WIDE BAY	19	113,817	132,581	18,764	16%	
SA	Metro Public SA	11	95,065	99,548	4,483	5%
	Metro SA	15	451,171	488,205	37,034	8%
	MID/LOWER NORTH	17	48,064	49,345	1,281	3%
	MURRAYLANDS	10	19,871	19,711	(160)	-1%
	NORTHERN DISTRICT	27	17,967	16,406	(1,561)	-9%
	NORTHERN TERRITORY	2	4,038	4,933	895	22%
	RIVERLAND	5	14,631	13,124	(1,507)	-10%
	Social SA	78	53,884	60,494	6,610	12%
	SOUTH EASTERN	14	40,032	44,381	4,349	11%
	SOUTHERN	17	135,370	143,243	7,873	6%
	Western	20	24,561	25,090	529	2%
YORKE PENINSULA	16	17,505	18,657	1,152	7%	

Association	District	Clubs	2013	2014	Change	% change
TAS	NORTH WEST	18	57,888	66,470	8,582	15%
	NORTHERN	27	85,786	90,444	4,658	5%
	SOUTHERN	31	150,999	158,355	7,356	5%
VIC	BALLARAT	23	110,534	119,829	9,295	8%
	BENDIGO	22	63,390	72,494	9,104	14%
	CENTRAL	2	8,304	8,895	591	7%
	CORANGAMITE	16	63,120	67,944	4,824	8%
	DALHOUSIE	16	55,596	58,041	2,445	4%
	EAST GIPPSLAND	17	71,193	74,400	3,207	5%
	GEELONG	20	269,215	289,060	19,845	7%
	GOULBURN VALLEY	19	131,118	133,793	2,675	2%
	KARA KARA	12	4,910	5,605	695	14%
	Metro Victoria	48	1,347,683	1,434,855	87,172	6%
	MURRAY DARLING	14	84,547	91,785	7,238	9%
	NORTH EASTERN	24	99,287	97,858	(1,429)	-1%
	NORTHERN	13	29,504	32,396	2,892	10%
	PENINSULA	22	343,701	419,869	76,168	22%
	SOUTH GIPPSLAND	11	61,505	67,292	5,787	9%
	SOUTH WESTERN	13	26,174	28,250	2,076	8%
	VGL	114	283,120	313,280	30,160	11%
WEST GIPPSLAND	12	100,698	106,923	6,225	6%	
WIMMERA	32	48,957	50,846	1,889	4%	
WA	AVON VALLEY	7	5,996	5,998	2	0%
	BLACKWOOD	10	9,098	10,203	1,105	12%
	CENTRAL DISTRICTS	3	1,544	1,408	(136)	-9%
	CENTRAL WEST COAST	9	4,682	4,823	141	3%
	DARLING RANGE	7	36,657	38,187	1,530	4%
	EAST GOLDFIELDS	7	11,879	14,728	2,849	24%
	EASTERN DISTRICT	7	2,177	2,345	168	8%
	ESPERANCE	5	11,766	11,942	176	1%
	GREAT SOUTHERN	14	8,733	8,047	(686)	-8%
	GROUP D	123	130,635	142,260	11,625	9%
	LAKES	5	1,214	1,091	(123)	-10%
	Metro WA	24	586,727	623,546	36,819	6%
	MORTLOCK	4	2,396	2,381	(15)	-1%
	MURCHINSON	4	512	677	165	32%
	NORTH EASTERN	6	1,668	1,612	(56)	-3%
	NORTHERN DISTRICT	8	24,791	24,734	(57)	0%
	PHILLIPS RIVER	4	1,102	1,085	(17)	-2%
	PILBARA	5	8,173	8,420	247	3%
	SOUTH CENTRAL	8	2,308	1,993	(315)	-14%
	SOUTH EASTERN	6	1,742	1,804	62	4%
	SOUTH WESTERN	9	79,457	85,212	5,755	7%
SOUTHERN DISTRICT	34	56,660	63,972	7,312	13%	
VICTORIA DISTRICT	7	2,360	2,246	(114)	-5%	
WEST KIMBERLEY	3	16,394	18,618	2,224	14%	
WHEATBELT	5	1,116	908	(208)	-19%	

Source: GolfLink, Golf Australia, GBAS