

Community Impact Study

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Commercial-in-confidence

Commissioned by:



Prepared by:



Australian Golf Industry Council



Foreword



Stephen Pitt, AGIC Chair

It's no surprise that golf brings a lot of joy to a lot of people.

As one of Australia's most popular participation sports for generations, it's sporting allure is no secret.

What hasn't been as obvious to all are the economic, social and health impacts the sport generates.

The AGIC Community Impact Study is a great step forward in being able to document the incredible value the game represents to not only those involved directly in the sport, but the Australian community at large. And, as the game evolves and expands to take in myriad new non-traditional forms, all new facilities – not just traditional clubs – are playing an ever-expanding role.

There are the more tangible benefits such as golf tourism and its associated financial benefits, or the increasingly important environmental aspects that open and green spaces encourage.

But as important, if not more so, are the intangibles.

This study reveals and documents the health advantages of engagement with golf – physical and mental health benefits worth millions of dollars to the Australian community are, quite simply, enormous.

Golfers are happier than others in the community at large, they are in better health and have greater social networks on which to call when things are tough.

While the numbers on tangible aspects are obviously eye-catching, I encourage all readers to look further and soak in the all-encompassing benefits of our wonderful sport.

We have, collectively as an industry, maintained for years that golf is the game for life.

In this report, to our immense pride and above all other sports, those who love golf can say those claims are now undeniably substantiated.



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Executive Summary

The Community Impact of Golf in Australia

Economic



Golf Community
Individuals
Business Multipliers

Social



Social Capital
Social Cohesion
Education

Health



Physical
Mental

Objectives

To determine the contribution of golf to the broader community in Australia. The focus of this project was to understand the benefit that golf contributes to the community across three key areas of economic, social and health benefits.

Method

A range of valuation methodologies have been used in this project that are consistent with approaches and data inputs from the Australian Bureau of Statistics, the Australian Institute of Health and Welfare, and the Australian Sports Commission.

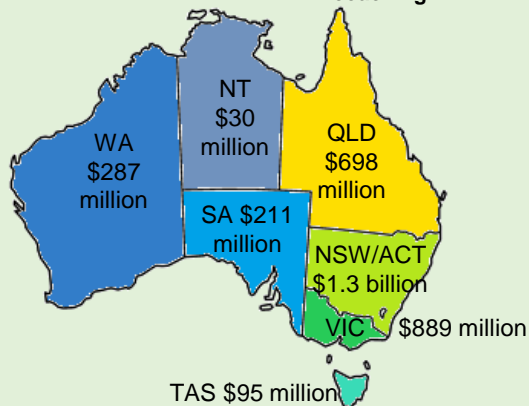
This project also incorporates primary research with golf stakeholders and participants – including an online survey with 1,243 individuals from within the golf community, and depth interviews with 18 golf industry stakeholders.

The community contribution of golf in Australia = \$3,614,409,411

Economic Benefit
\$3,482,740,000

Unique Strengths of Golf's Social Benefits

Health Benefit
\$131,667,411p.a.



Participation in golf provides regular and cross-generational **social interaction across the lifespan.**

Golf provides a foundation to **build a strong and connected community.**

The game of golf and golf courses provide a **strong connection to the outdoors and natural environment.**

Golf teaches **valuable life lessons and principles** such as respect, honesty, etiquette and self discipline.

Australian golfers have a **life satisfaction score of 7.4** compared to Australian population 7.3 and OECD countries 6.6.

Australian golfers **score 8 percentage points higher for social capital** than Australian sport participants and 16 percentage points higher than non-sport participants.



Physical Health
\$126,623,707p.a.



Mental Health
\$5,043,704p.a.

Lifetime Health Contribution
\$4,509,046,214

Proportion of Annual Health Contribution generated by Australian golf members

79%

Executive Summary

Key Economic Findings

Golf is one of the largest participation and community sports in Australia with well over one million participants. They are among a number of high profile sports which are becoming increasingly commercially oriented. Indeed, most golf clubs have been managed as small to medium businesses in their own right for many decades; both public (or community) and private ventures.

Golf makes an economic contribution to Australia and Australian regions of \$3.482 billion. This includes:

- The regular and occasional participants (from social to program based participants, school participants, regular club member competitors, and elite participants at the many events staged throughout the year).
- Expenditure on services, goods, maintenance, and employees by golf clubs, associations and peak bodies.
- Golf tourism, which generates visitation throughout Australia.
- Golf training and coaching activities.
- Retailing of golf equipment and merchandise.

Note - 'Ancillary' means non-golfing businesses or organisations within the immediate golf supply chain (such as coaches, retailers, food and beverage

Direct Contribution

Region	Association and Club Expenditure (\$ million)	Regular Participants (\$ million)	Club Events (\$ million)	Club and School Programs (\$ million)	Total Direct (\$ million)
NSWACT	728.275	180.356	17.557	9.473	935.661
NT	11.927	2.988	1.003	0.145	16.063
Qld	372.625	95.245	8.673	4.253	480.796
SA	107.376	32.852	4.064	1.783	146.075
Tas	49.078	15.366	1.994	0.712	67.150
Vic	415.619	142.455	15.859	7.437	581.371
WA	150.338	38.713	4.644	2.200	195.895
Total	1,835.237	507.975	53.794	26.004	2,423.011

Ancillary Contribution

Region	Golf Tourism (\$ million)	Retail and Coaching (\$ million)	Total Ancillary (\$ million)
NSWACT	145.809	189.731	335.541
NT	9.678	4.889	14.567
Qld	94.137	123.243	217.379
SA	26.795	38.665	65.460
Tas	12.820	15.270	28.090
Vic	161.912	145.756	307.668
WA	26.717	64.310	91.026
Total	477.868	581.864	1,059.732

Executive Summary

Golf clubs and courses are **significant local businesses** that strengthen the surrounding economy

Unique Facts:

Golf clubs and courses are often large employers within a local community. This includes greenkeepers, administration staff and hospitality staff.

Golf clubs use local suppliers from within their community, whether that be food and beverage supplies or local trades.

Retail merchandise, golf training and coaching, and golf tourism contribute \$1,060 million to the economic footprint of golf.

Case Studies (Snapshot):

Wembley Golf Course

Wembley Golf Course in Western Australia is more than just a public golf course. It offers golf, mini golf, high quality café and bistro, and a children's playground. The venue provides many employment opportunities, together with being a viable, sustainable local business.

City Golf Club

Located in Toowoomba, the club offer includes golf, dining, entertainment, function and accommodation services to the local community. Many great local employment opportunities are provided to support the activities of the club.



"We definitely give opportunities to locals that they wouldn't have otherwise had. We put our staff through TAFE courses, giving them training." Golf Administrator

"Golf is a sport which is full of employment opportunities. You have hospitality for university students, green keeping for apprentices, administration, coaching, retail, etc. We all know you can play for life, but not many realise you can also have an entire career in the industry too." Golfer

"The eco-system of the game, the agronomy, the PGA traineeships, the importance of Boards and decision making, apprentice chefs, golfers and mechanics – and superintendents – these all create opportunities to be involved with the game for fun and for life." Club GM

Executive Summary

KEY SOCIAL FINDINGS

Golf, like many sports at a grassroots community level, contributes a broad range of social benefits such as community cohesion, social mobility, social inclusion and social capital.

The approach used in this study towards understanding the social contribution of golf included:

- A global **literature review** of sport's social impact.
- Depth **interviews with 18** golf industry stakeholders.
- A **survey with 1,243** individuals from the Australian golf community.
- Development of **detailed case studies**.
- Data from the Australian Bureau of Statistics (ABS), AusPlay and Organisation for Economic Co-Operation and Development (OECD).

Using the 11 OECD aspects identified as essential to well-being, and the ABS factors to measure social capital, the following highlights have been identified.

- On average Australian golfers have a **life satisfaction score of 7.4**, compared to the Australian population at 7.3 and the average of OECD countries at 6.6.

- On average Australian golfers scores for **social capital are eight percentage points (p.p) higher** than Australian sports participants, and 16 p.p higher than non-sport participants.
- Australian golfers have a **slightly higher self-assessed health status (59%)** than both general sport participants (57%) and non-sport participants (40%).



Executive Summary

Participation in golf provides **regular** and cross-generational **social interaction across the life span**

Unique Facts:

Golf clubs and courses are often the venue for many social events, thus providing an interactive social hub for the local community.

There are many examples of how the social connection not only encourages physical activity, but also provides extensive mental health benefits to those involved.

Many older golfers note that the bulk of their friendship group often belong to their club.

Case Studies (Snapshot):

Bakers Hill

For 40 years the Bakers Hill Golf Club has been running a well-established junior programme. The club's philosophy is simple – make golf as accessible as possible for children. A change in mindset to encourage juniors may create a sustainable base of long-term golfers with a life-long love of the sport.

Swing Fit

Swing Fit is a fun, healthy and social way for women to learn and develop golf skills. The Swing Fit program encourages women to learn the skills of golf, allowing them to become actively involved in social and family activities.



"It's a game that can be played by all ages; from 5 to 85, 95 or indeed 105. There are not many sports that can have a child compete against their parent or grand-parent" Golf Administrator

"I am retired, but my wife is still working. My days are spent at home with the dog doing domestic chores. Golfing twice a week is awesome socially. I now volunteer in a crew of five for our greenkeeping staff. Three hours on a Monday morning, it's very rewarding and a huge amount of fun." Golfer

Executive Summary

Golf provides a foundation to build a strong and connected community

Unique Facts:

Golf clubs and courses in many areas are recognised for their contribution to local communities. This includes being a social hub, providing fundraising activities and supporting community groups.

Increasingly, clubs that provide cafes are becoming meeting places, not only for golfers, but many local community members.

Golf industry expertise is now being shared with the local community. For example some ground staff maintain other local sporting venues.

Case Studies (Snapshot):

MyGolf Ambassador Program

The MyGolf school ambassador program aims to provide teachers with the necessary resources to promote and deliver the program within their local community. This will assist in growing the sport at grassroots level and improve the accessibility of golf.

KDV Sport

The Carrara Gardens Golf Course is a modern, state-of-the-art sporting complex that includes a 12 hole golf course, together with mini golf, driving range, tennis, swimming pool and gymnasium. This facility encourages participation of all ages and abilities, and the opportunity to have fun with family and friends.



“It enables different people of different demographics to meet each other and play sport – a cemetery worker, a doctor and an accountant and plumber – and all have something in common.”
Club GM

“Golf provides a method of connecting to the community outside of the work and family environments. It also gives an instant connection when moving to a new location, nationally or internationally. Volunteer work drives a small country club like ours, strengthening pride in belonging. It’s more than a game!!” Golfer

Executive Summary

The game of golf and golf courses provide a **strong connection to the outdoors and natural environment**

Unique Facts:

The connection to the outdoors and nature on the golf course is fast becoming the only time many spend in green open space.

In many metropolitan areas golf courses provide critical green wedges and open spaces that support birdlife, wetlands and other animals.

Research shows that an area of 180m² of turfed grasses, grasslands and trees produce enough oxygen to support one person. Australian Golf courses provide enough oxygen to support approximately 4.17 million people.

Case Studies (Snapshot):

Moore Park Golf Course

Moore Park Golf Course was established in 1913, and just 10 minutes drive from Sydney's CBD. It has positioned itself as a community entrainment complex on a strong and accessible golf offer, with a focus on being "the people's" golf course.



"Getting out in the fresh air, enjoying the environment, playing and walking for 4 or 5 hours – I can't see how it can be a bad thing for you, your body or mind. It's an opportunity to converse with your mates and friends. You get things off your chest – and it's where you get out and talk to somebody and socialise." Club Volunteer/Golfer

"The sheer size of the green footprint, the green open spaces and inherent community value via clubs and facilities, will only increase as development pace grows. These green spaces are important to the community." Golf Administrator

Executive Summary

Golf teaches valuable life lessons and principles such as respect, honesty, etiquette and self discipline

Unique Facts:

The game teaches life skills to younger players, such as respect, appropriate behaviour, honesty and etiquette.

Golf provides both competitive and non-competitive opportunities. You can choose to play in a competition and compete against others, or you can play for the enjoyment of the game.

Golf can be played by all ages, from 5 to 95. Very few other sports can have a child compete against people in their 80's or 90's.

Since 2015 the MyGolf sporting schools program has been delivered to 926 schools across Australia, engaging nearly 29,000 students.

Case Studies (Snapshot):

Yalata Anangu School

The Aboriginal community of Yalata is situated 250km from the closest town. However, it is also now home to a new four hole golf course. The teacher had a vision of providing the educational benefits of golf to the students in a practical and 'hands-on' manner.



"The game's values are fantastic. There are strong expectations that people will behave well. These values are linked to the game as well. The respect, the behaviour, the standards expected – all of these learnings are provided by the game and are transferable to life." Club CEO

"Developing a four-hole course for the local school has a wonderful impact on the students. We have been able to provide a new sporting and education experience for kids who are not interested in playing the traditional game." Course GM

Executive Summary

KEY HEALTH FINDINGS

- **Regular participation in physical activity** provides significant health benefits to individuals from both a physical and mental health perspective.
- The physical health benefits analysed in this study are derived from **reducing the prevalence of chronic diseases** (breast cancer, coronary heart disease, diabetes, bowel cancer and stroke) as identified by the Australian Institute of Health and Welfare.
- The mental health benefits are derived from reducing the prevalence of anxiety and depression.
- Three out of the top ten most common diseases in Australia are reduced in prevalence through physical activity, with **5.0% of all diseases being attributed to physical inactivity** according to the Australian Institute of Health and Welfare.
- These diseases which are reduced in prevalence through physical activity have a significant negative impact on the health of Australians. **Physical inactivity is the fourth highest risk of disease** behind tobacco, obesity and alcohol use.
- 94% of the burden of disease resulting from physical inactivity is borne by people aged 15 years and above, especially those aged over 45 years of age – therefore **golf participation plays a significant preventative role in the later stages of life.**



Executive Summary

KEY HEALTH FINDINGS

The community contribution to health which golf provides in terms of dollars saved is significant for all golfers. The reason golf members provide a greater contribution than social players is based on the higher frequency of participation. The charts below highlight those contributions annually and across the lifetime of participation.

Australian Golf Members

ANNUAL HEALTH CONTRIBUTION – GOLF MEMBERS			
Participant Segment	Physical Health Benefit	Mental Health Benefit	Total Health Benefit (Yr)
Males	\$85,951,724	\$1,517,217	\$87,468,941
Females	\$14,455,757	\$2,429,034	\$16,884,791
Total	\$100,407,481	\$3,946,251	\$104,353,732

Based on 393k individuals this equates to
\$265 per person (per year)

LIFETIME HEALTH CONTRIBUTION – GOLF MEMBERS			
Participant Segment	Physical Health Benefit	Mental Health Benefit	Total Health Benefit (Yr)
Males	\$3,243,885,742	\$33,310,498	\$3,277,196,240
Females	\$499,156,310	\$51,110,493	\$550,266,803
Total	\$3,743,042,052	\$84,420,991	\$3,827,463,043

Based on 393k individuals this equates to
\$9,715 per person (lifetime)

Social Players

ANNUAL HEALTH CONTRIBUTION – SOCIAL PLAYERS			
Participant Segment	Physical Health Benefit	Mental Health Benefit	Total Health Benefit (Yr)
Males	\$22,448,331	\$460,594	\$22,908,925
Females	\$3,767,896	\$636,857	\$4,404,753
Total	\$26,216,227	\$1,097,451	\$27,313,678

Based on 628k individuals this equates to
\$43 per person (per year)

LIFETIME HEALTH CONTRIBUTION – SOCIAL PLAYERS			
Participant Segment	Physical Health Benefit	Mental Health Benefit	Total Health Benefit (Yr)
Males	\$597,050,994	\$7,878,111	\$604,929,105
Females	\$72,985,643	\$3,668,424	\$76,654,067
Total	\$670,036,637	\$11,546,535	\$681,583,172

Based on 628k individuals this equates to
\$1,085 per person (lifetime)

Annual Total
\$131,667,411

Lifetime Total
\$4,509,046,214

Executive Summary

A lifelong contribution to reducing the healthcare burden on society through the prevention of disease

Unique Facts:

For many, the health benefits gained from walking and socialisation over seven to nine kilometres, would not happen without a connection to golf.

Golf is the number one sport for adults aged over 45, increasing the reduction in healthcare costs later in life.

Golf provides a high value experience for many people by bringing them together and providing a social connection.

Case Studies (Snapshot):

Inclusive Coaching

The PGA of Australia provide a two-day workshop for members to increase their understanding on inclusive coaching principals. This will ensure more golfers with a disability can access the sport the health benefits of golf.

World Golf Foundation – Golf and Health Project

This project aims to academically research the impact golf has on health, illness prevention and associated injuries. The results have shown that golf improves life expectancy and quality of life. As well as decreasing the risk of more than 40 major chronic diseases.



“It’s an incredibly important game and the biggest benefits are that it has major social and health benefits. We have seen first hand the impact of regional clubs and the impact of a club and its footprint in the local community. The opportunity to get out of the hustle and bustle. We don’t promote the health benefits enough, the diabetes and heart benefit, it’s a hidden gem.” Golfer

“A player has to be well organised, maintain some social skills, play shots, work out and think about scoring, using social discussion is very important. He or she is often competing against themselves or within a group and on top of that, they are walking 8-10 kilometres to boot!” Golfer



Main Report - 1: Economic Contribution

1: Economic Contribution

SCOPE OF THE ASSESSMENT

A range of data sources were assessed to determine estimates of the economic contribution and socio-economic indicators for golf. These included:

- Annual reports from golf organisations in Australia.
- Analysis of a selection of financial statements and a survey of golf clubs throughout Australia. Financial statements or records were collected from 170 golf organisations.
- Details of golf participants in 2016 from the Golf Club Australia Participation Reports.
- Survey of 1,243 participants by Sport Business Partners.
- Australian Bureau of Statistics Census of Population and Housing Data.
- Tourism Research Australia regional profiles for 2016.
- IBISWorld industry reports.

Results have been applied to, and reported by, Regional Development Australia (RDA) regions around Australia.



1: Economic Contribution

PARTICIPATION NUMBERS AND STATE ECONOMIC CONTRIBUTIONS

Participant Numbers

The number of participants in varying forms of golf in Australia during 2016-17 have been derived from the Golf Club Australia Participation Report, Sport Business Partners survey of participants, and Tourism Research Australia data. The estimated participation details are as follows:

- Program Participants (Club and School): 205,074.
- Event Participants: 161,300.
- Playing members of golf clubs: 393,975.
- Club competition rounds of golf: 14,850,426.
- Non-member rounds of golf: 6,844,670.
- Golf tourism rounds of golf: 3,527,653.

State, Regional and Local Contributions

It is estimated that golf had a direct and ancillary economic contribution to Australia in 2016-17 of **\$3,482.74 million**, including:

- **\$412.22 million** through **clubs and associations** (including peak organisations).
- **\$507.98 million** through **member and social** golf participants.
- **\$477.87 million** through **golf tourism** (including day and overnight visitation, and expenditure on food and beverages, accommodation, travel, shopping, etc).
- **\$79.80 million** through **golf events and programs** (including the program of events staged at clubs around the States, school competitions and events, MyGolf programs, and other social programs).

- **\$581.86 million** through **retail merchandise** outlets, **golf training** and **coaching** businesses.

New South Wales generated an estimated 34.8% of the 2016-17 golf economic contribution, with **Victoria having the second greatest** level of contribution, at 25.5%.

Sydney is the most significant region in economic contribution; 16.5% of the National total, **just ahead of the Melbourne region**, with 16.1%. Other major regions, making up the largest 10 contributing regions, were:

- Brisbane, \$169.9 million, or 4.9% of the national economic contribution.
- Gold Coast, \$149.7 million or 4.3% of the national economic contribution.
- Perth, \$142.9 million, or 4.1% of national economic contribution.
- Hunter NSW, \$118.2 million, or 3.4% of the national economic contribution.
- Barwon South-West Victoria, \$111.6 million, or 3.2% of the national economic contribution.
- Adelaide, \$105.1 million, or 3.0% of the national economic contribution.
- Tasmania, \$95.2 million, or 2.7% of the national economic contribution.
- Mid-North Coast NSW, \$86.7 million, or 2.5% of the national economic contribution.

1: Economic Contribution

REGIONAL ECONOMIC CONTRIBUTION

The economic contribution of golf is relatively **evenly split between metropolitan and non-metropolitan areas**. The combined contributions of the six largest capital cities (Sydney, Melbourne, Brisbane, Perth, Adelaide and Canberra) was 49.6%, or \$1,727.51 million, with 50.4% in Hobart, Darwin and all non-metropolitan areas.

Other findings at a regional level include:

Regions with the greatest club and association estimated contribution were:

- Sydney, \$333.53 million.
- Melbourne, \$273.62 million.
- Brisbane, \$90.26 million.
- Gold Coast, \$79.35 million.
- Perth, \$73.43 million.

Regions with the greatest estimated contributions from regular participants were:

- Melbourne, \$83.84 million.
- Sydney, \$72.44 million.
- Brisbane, \$24.26 million.
- Gold Coast, \$20.64 million.
- Barwon South-West Victoria, \$20.55 million.

Regions with the greatest estimated level of golf tourism were:

- Melbourne, \$96.4 million.
- Sydney, \$67.66 million.
- Gold Coast, \$22.01 million.
- Barwon South-West Victoria, \$19.70 million.
- Adelaide, \$17.70 million.

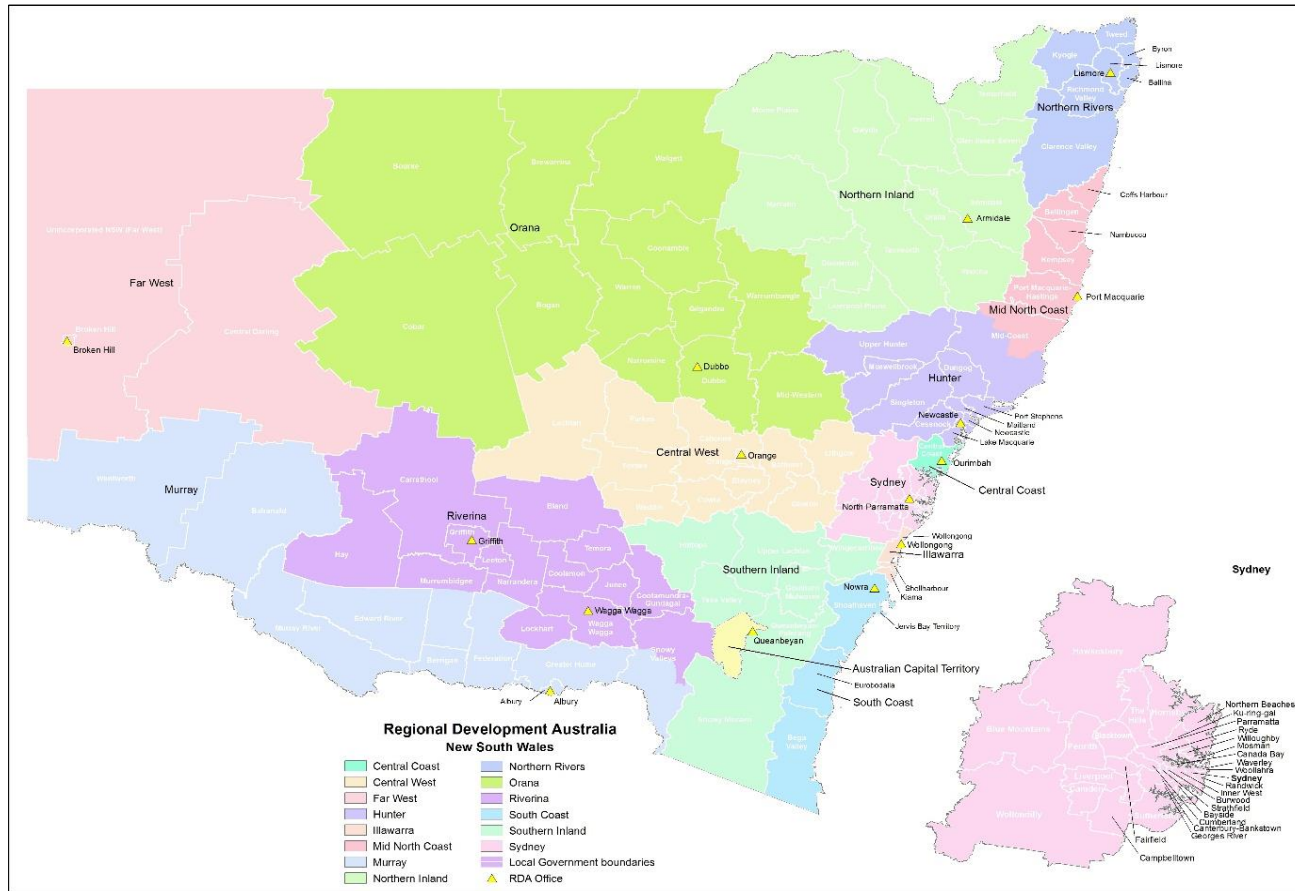
1: Economic Contribution

NATIONAL ECONOMIC CONTRIBUTION – BY STATE

Region	Association and Club Expenditure (\$ m)	Regular Participants (\$ m)	Club Events (\$ m)	Club and School Programs (\$ m)	Total Direct (\$ m)	Golf Tourism (\$ m)	Retail and Coaching (\$ m)	Total Ancillary (\$ m)	Total Direct and Ancillary Contribution (\$ m)
NSWACT	728.275	180.356	17.557	9.473	935.661	145.809	189.731	335.541	1,271.202
NT	11.927	2.988	1.003	0.145	16.063	9.678	4.889	14.567	30.630
Qld	372.625	95.245	8.673	4.253	480.796	94.137	123.243	217.379	698.176
SA	107.376	32.852	4.064	1.783	146.075	26.795	38.665	65.460	211.535
Tas	49.078	15.366	1.994	0.712	67.150	12.820	15.270	28.090	95.240
Vic	415.619	142.455	15.859	7.437	581.371	161.912	145.756	307.668	889.039
WA	150.338	38.713	4.644	2.200	195.895	26.717	64.310	91.026	286.921
Total	1,835.237	507.975	53.794	26.004	2,423.011	477.868	581.864	1,059.732	3,482.742

1: Economic Contribution

ECONOMIC CONTRIBUTION – New South Wales (including ACT)



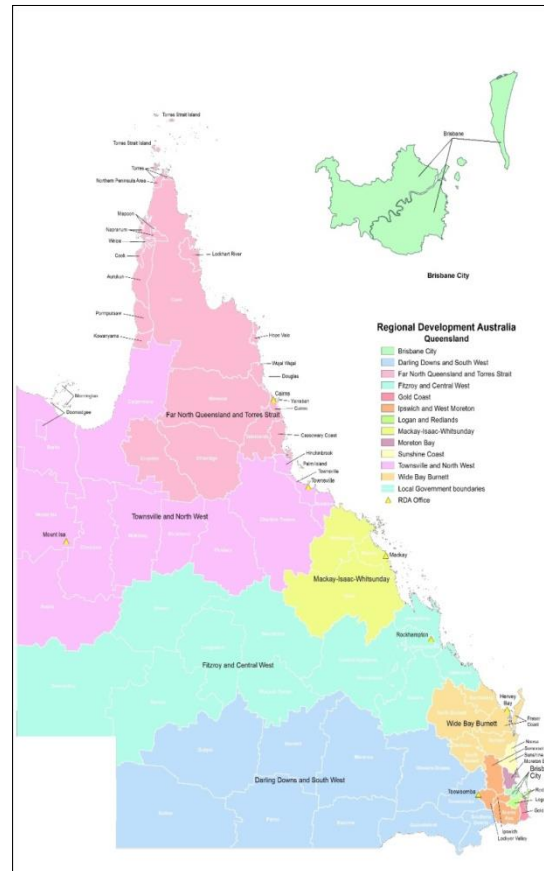
1: Economic Contribution

ECONOMIC CONTRIBUTION – New South Wales (Including ACT)

Region	Association and Club Expenditure (\$ m)	Regular Participants (\$ m)	Club Events (\$ m)	Club and School Programs (\$ m)	Total Direct (\$ m)	Golf Tourism (\$ m)	Retail and Coaching (\$ m)	Total Ancillary (\$ m)	Total Direct and Ancillary Contribution (\$ m)
ACT	32.916	7.650	0.699	0.354	41.619	10.832	7.083	17.915	59.534
Central Coast	34.434	10.734	0.628	0.493	46.289	4.903	9.867	14.770	61.059
Central West	18.348	4.562	0.288	0.226	23.423	3.741	4.526	8.268	31.691
Far West	1.457	0.410	0.027	0.021	1.915	0.396	0.419	0.815	2.730
Hunter	67.583	18.360	1.127	0.884	87.955	12.548	17.713	30.261	118.215
Illawarra	22.480	5.785	0.354	0.277	28.896	3.828	5.556	9.384	38.280
Mid North Coast	51.373	13.528	0.810	0.635	66.345	7.618	12.724	20.343	86.688
Murray	21.455	11.168	0.627	0.492	33.741	3.032	9.850	12.883	46.623
Northern Inland	27.654	7.005	0.439	0.345	35.443	5.514	6.904	12.418	47.861
Northern Rivers	41.471	11.047	0.716	0.562	53.796	10.507	11.252	21.760	75.556
Orana	14.799	3.172	0.207	0.163	18.341	3.160	3.260	6.420	24.761
Riverina	18.513	5.197	0.325	0.255	24.290	4.009	5.106	9.115	33.404
South Coast	42.267	9.297	0.593	0.465	52.622	8.063	9.313	17.377	69.999
Sydney	333.525	72.441	10.718	4.302	420.987	67.657	86.157	153.814	574.801
Total NSWACT	728.275	180.356	17.557	9.473	935.661	145.809	189.731	335.541	1,271.202

1: Economic Contribution

ECONOMIC CONTRIBUTION – Queensland and Northern Territory



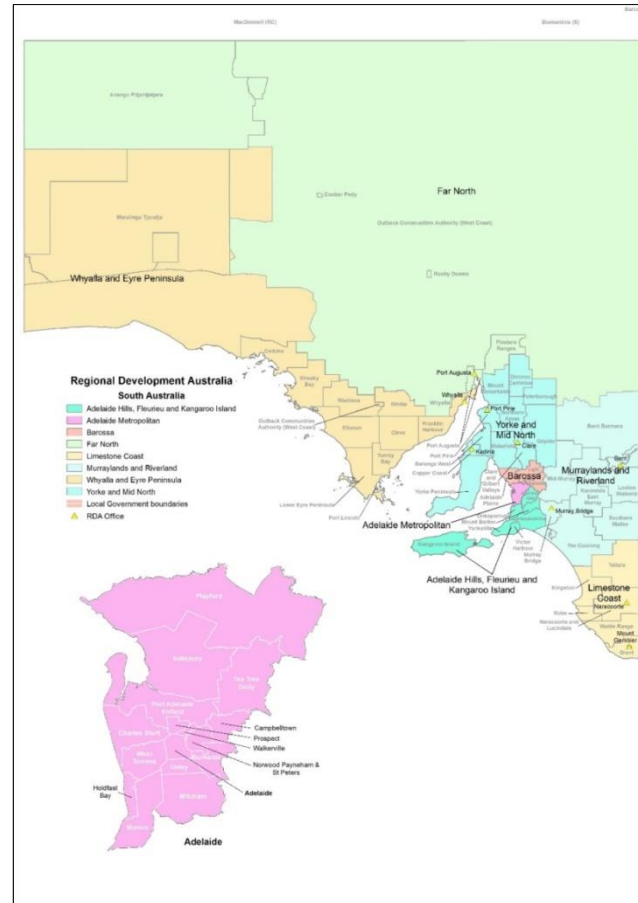
1: Economic Contribution

ECONOMIC CONTRIBUTION – Queensland and Northern Territory

Region	Association and Club Expenditure (\$ m)	Regular Participants (\$ m)	Club Events (\$ m)	Club and School Programs (\$ m)	Total Direct (\$ m)	Golf Tourism (\$ m)	Retail and Coaching (\$ m)	Total Ancillary (\$ m)	Total Direct and Ancillary Contribution (\$ m)
NT	11.927	2.988	1.003	0.145	16.063	9.678	4.889	14.567	30.630
Brisbane	90.255	24.258	2.557	1.202	118.271	16.805	34.830	51.635	169.906
Darling Downs and SW	18.208	5.972	0.506	0.275	24.961	8.652	7.982	16.634	41.595
Far North	18.322	3.546	0.345	0.188	22.401	8.484	5.440	13.924	36.324
Fitzroy and Central West	19.690	4.908	0.410	0.224	25.232	6.710	6.477	13.187	38.420
Gold Coast	79.347	20.639	2.087	0.856	102.929	22.006	24.798	46.804	149.734
Ipswich and West Moreton	18.799	4.121	0.309	0.168	23.397	2.955	4.878	7.832	31.229
Logan and Redlands	26.679	8.917	0.632	0.345	36.573	3.665	9.984	13.649	50.222
Mackay Whitsunday	9.673	1.763	0.178	0.097	11.711	4.706	2.807	7.512	19.223
Moreton Bay	25.198	6.371	0.452	0.246	32.267	2.665	7.143	9.808	42.075
Sunshine Coast	28.345	6.298	0.547	0.298	35.489	10.181	8.640	18.821	54.309
Townsville and NW	16.585	3.234	0.273	0.149	20.240	4.606	4.306	8.913	29.153
Wide Bay Burnett	21.523	5.219	0.377	0.206	27.325	2.701	5.960	8.661	35.986
Total Qld	372.625	95.245	8.673	4.253	480.796	94.137	123.243	217.379	698.176

1: Economic Contribution

ECONOMIC CONTRIBUTION – South Australia



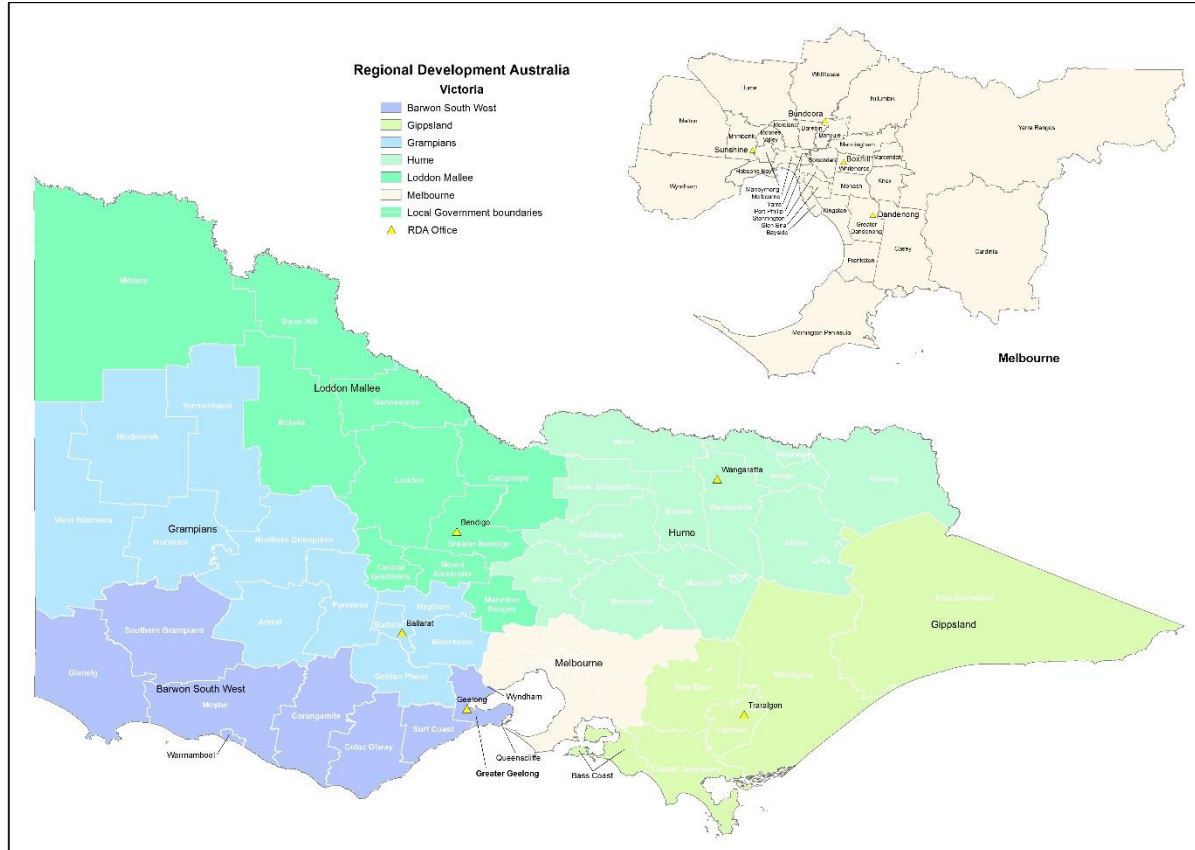
1: Economic Contribution

ECONOMIC CONTRIBUTION – South Australia

Region	Association and Club Expenditure (\$ m)	Regular Participants (\$ m)	Club Events (\$ m)	Club and School Programs (\$ m)	Total Direct (\$ m)	Golf Tourism (\$ m)	Retail and Coaching (\$ m)	Total Ancillary (\$ m)	Total Direct and Ancillary Contribution (\$ m)
Adelaide	52.356	13.142	2.647	0.847	68.992	17.704	18.362	36.066	105.058
Barossa	5.316	1.530	0.116	0.077	7.039	1.063	1.669	2.732	9.771
Far North	1.306	0.568	0.042	0.027	1.944	0.302	0.596	0.898	2.842
Hills, Fleurieu and KI	22.394	9.948	0.673	0.445	33.460	2.279	9.644	11.923	45.383
Limestone Coast	8.128	2.139	0.169	0.112	10.548	1.811	2.419	4.230	14.778
Murraylands and Riverland	7.826	2.133	0.163	0.108	10.230	1.528	2.340	3.867	14.098
Whyalla and Eyre Peninsula	5.358	1.583	0.117	0.077	7.135	0.898	1.675	2.572	9.708
Yorke and Mid North	4.690	1.808	0.137	0.090	6.726	1.210	1.961	3.171	9.896
Total SA	107.376	32.852	4.064	1.783	146.075	26.795	38.665	65.460	211.535

1: Economic Contribution

ECONOMIC CONTRIBUTION – Victoria and Tasmania



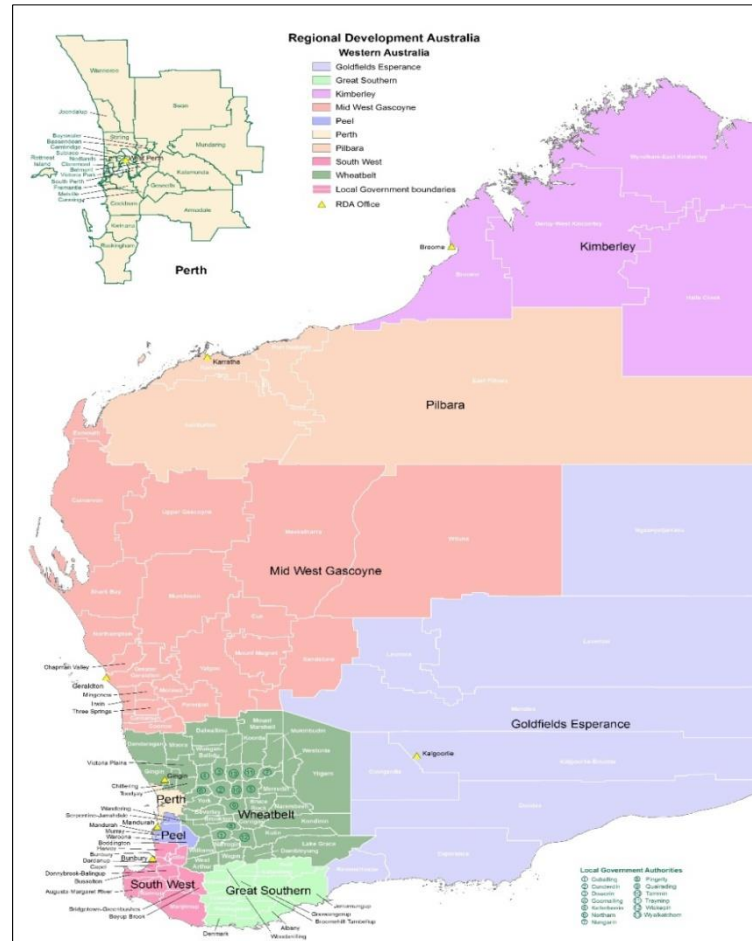
1: Economic Contribution

ECONOMIC CONTRIBUTION – Victoria and Tasmania

Region	Association and Club Expenditure (\$ m)	Regular Participants (\$ m)	Club Events (\$ m)	Club and School Programs (\$ m)	Total Direct (\$ m)	Golf Tourism (\$ m)	Retail and Coaching (\$ m)	Total Ancillary (\$ m)	Total Direct and Ancillary Contribution (\$ m)
Tasmania	49.078	15.366	1.994	0.712	67.150	12.820	15.270	28.090	95.240
Barwon South West	49.988	20.550	1.179	0.980	72.697	19.699	19.212	38.912	111.609
Gippsland	25.836	10.433	0.627	0.521	37.417	12.318	10.218	22.536	59.953
Grampians	23.148	8.896	0.559	0.465	33.069	12.493	9.111	21.604	54.673
Hume	20.047	8.162	0.516	0.429	29.154	11.680	8.403	20.083	49.237
Loddon Mallee	23.308	10.572	0.597	0.496	34.972	9.321	9.721	19.042	54.014
Melbourne	273.292	83.843	12.382	4.546	374.062	96.400	89.092	185.492	559.553
Total Victoria	415.619	142.455	15.859	7.437	581.371	161.912	145.756	307.668	889.039

1: Economic Contribution

ECONOMIC CONTRIBUTION – Western Australia



1: Economic Contribution

ECONOMIC CONTRIBUTION – Western Australia

Region	Association and Club Expenditure (\$ m)	Regular Participants (\$ m)	Club Events (\$ m)	Club and School Programs (\$ m)	Total Direct (\$ m)	Golf Tourism (\$ m)	Retail and Coaching (\$ m)	Total Ancillary (\$ m)	Total Direct and Ancillary Contribution (\$ m)
Goldfields Esperance	6.144	1.633	0.133	0.082	7.992	0.897	2.389	3.286	11.277
Great Southern	6.604	2.052	0.158	0.098	8.912	0.664	2.854	3.518	12.431
Kimberley	1.468	0.661	0.056	0.035	2.220	0.502	1.012	1.514	3.734
Mid West Gascoyne	8.008	2.069	0.167	0.103	10.347	1.107	3.017	4.124	14.472
Peel	20.463	4.585	0.364	0.225	25.637	2.067	6.563	8.630	34.267
Perth	73.427	16.923	2.894	1.121	94.365	15.804	32.770	48.574	142.939
Pilbara	7.112	2.464	0.192	0.118	9.886	0.900	3.460	4.361	14.247
South West	21.827	5.159	0.426	0.263	27.675	3.255	7.682	10.937	38.613
Wheatbelt	5.285	3.166	0.253	0.156	8.860	1.521	4.562	6.082	14.943
Total WA	150.338	38.713	4.644	2.200	195.895	26.717	64.310	91.026	286.921

1: Economic Contribution

Wembley Golf Course

The Town of Cambridge, the owners of Wembley Golf course invested in a significant improvement program with major capital expenditures not seen at any other council owned facility in Australia - \$30 million over 14 years.

Background

The vision for the new facilities was focused around being “an active community hub” that would appeal to broad demographic including non-golfers.

Initiative

A series of upgrades launched in November 2016 including:

- 18 hole mini golf facility.
- New restaurant and function facility.
- Children’s playground.

Outcome

Both the mini-golf and playground developments have brought a new and varied customer base to the facility.

- Diversified revenue stream.
- Increased visitation and range of customers including many “non-golfers” and an age spread from 4 to 80-years-old.

What’s Next?

- Planning for the replacement of the ageing golf course depot and staff amenities.
- Strategies to increase engagement and improve service levels.

Reference

- <https://www.golfbusinessforum.com.au/golfbusinessblog/2017/5/31/an-update-from-one-of-our-hero-facilities-wembley-golf-course>



Key learnings

- Offering a more diverse range of experiences such as a mini golf course, a driving range and a high quality food and beverage offer attracts more families and visitors.
- This leads to increased community engagement and creates a “must-visit” destination for visitors.

1: Economic Contribution

City Golf Club

City Golf Club in Toowoomba is a community hub, offering golf, dining, entertainment, function and accommodation services to the local community. As a not-for-profit organisation, all profits made are distributed to the community.

Background

- The Club has supported up to 76 local community services and charities.
- The Club also supports 16 other golf courses in the region, to ensure everyone has the opportunity to experience the game of golf.
- Since 2009, the Club has hosted the Queensland PGA Championships. It is also home to number of community groups, hosting community events, conferences and functions throughout the year.

Initiative

- In January 2017, the Club opened a new 18-hole mini golf facility, which has attracted a large number of young children to the Club.
- This year the Club will host the inaugural Turf Green Mini Golf Open Championships, with \$700 worth of prizes up for grabs.

Outcome

- The Club has recently been awarded the Best Sports Club Queensland (Large), Best Sports Club Darling Downs & South-West Queensland and the Best Entertainment Venue Queensland.

Next Steps

- The Club is undergoing a further 5-stage, \$4 million redevelopment to extend the clubhouse and deck, build a buggy storage shed and install 155 car parks.

Reference

- <http://www.citygolf.com.au/info/>



Key learnings

- Many golf clubs and centres act as community hubs, that provide local charities and community groups with critical resources, funding, meeting places and connectivity.

2: Social Contribution

Queensland Golf Foundation

Golf Queensland launched a new foundation in conjunction with the Australian Sports Foundation to support the next generation of juniors and women's golf, and golf clubs in general.

Background

In 2016, the Queensland Golf Foundation launched a new program to raise funds directed towards three key areas of the game: Juniors, Ladies and Clubs. The foundation has called for clubs to 'pitch in' and support the various learn to play programs, talented player pathways and increased viability of the Queensland club network.

Initiative

The Brisbane Golf Club became the first club in Queensland to approve member participation in the Queensland Golf Foundation's 'Pitch In' program. The club and its members donated over \$19,500 to the foundation earlier this year.

The club is motivated to support the next generation of golfers from Central Western regions of Queensland.

Outcome

The foundation is now up and running and supporting the game of golf in communities who may not have access to it and with people who never thought they could try it.

References

- <http://www.golfqueensland.org.au/newsdisplay/brisbane-golf-club-generously-pitches-in/97235> and;
- <http://www.golfqueensland.org.au/newsdisplay/golf-queensland-launches-queensland-golf-foundation/95298>



Key learnings

- Golf's governing bodies have the potential to generate large positive impacts on the community through their extensive network of clubs and their subsequent members.



Main Report - 2: Social Contribution

2: Social Contribution

ASSESSMENT APPROACH AND KEY ASSUMPTIONS

The following provides an overview of the conceptual methodology that was used to assess the social contribution of golf to the community.

Qualitative assessment

- A literature review was undertaken to understand the definitions and contextual approach towards what we have labelled as “community contribution”. This includes social cohesion, social capital, social inclusion, and social mobility – these concepts are frequently used interchangeably although there are slight differences. For this project we have focused on the development of social capital and social cohesion given these concepts primarily look at individuals and their local community networks, as distinct from society as a whole.
- Depth interviews were undertaken with **18 experienced stakeholders** from within the Australian golf community. The objective of this phase was to uncover the intangible social and other benefits of being involved in the sport.

Quantitative data

- In 2012 the Australian Bureau of Statistics produced a report which sought to establish a correlation between indicators of social capital and sports participation. These social capital indicators included self-assessed health; personal stressors; work-life balance; feelings of safety and trust; social network size and diversity; and access to support. The questionnaire construct for these ABS Social Capital indicators was replicated through an **online survey with 1,243** Australian golfers in July/August 2017.
- The Organisation for Economic Co-Operation and Development (OECD) conducts a measurement of life satisfaction which seeks to evaluate a person’s life as a whole rather than their current feelings. The questionnaire construct for the OECD measure of life satisfaction was replicated through an **online survey with 1,243** Australian golfers in July/August 2017.

2: Social Contribution

DATA SOURCES

The following data sources have been used as key inputs into the approach towards valuing the social contribution of golf.

Each data source is presented in more detail over the following pages.

- The community benefits of sport participation.
- What is a cohesive society?
- The Australian Bureau of Statistics' Sport and Social Capital in Australia.
- Depth interviews with Australian golf stakeholders.

The community benefits of sport participation^{11,12,13}

Some of the commonly identified social benefits of participating in sport are; improved community identity, community cohesion, the promotion of community pride and ownership, and the promotion of ethnic or cultural harmony.

A literature review by Atherley (2006) concluded that sport can provide social benefits such as community integration, cohesion, cooperation, and community identity and pride.

It is also evidenced that sport participation can contribute to crime reduction, community safety, education and lifelong learning, and environmental benefits.

Life Satisfaction¹⁴

The OECD measures 11 aspects identified as essential to well-being in terms of material living conditions (housing, income, jobs) and quality of life (community, education, environment, governance, health, life satisfaction, safety and work-life balance).

What is a cohesive society?¹⁴

The OECD defines a society as “cohesive” if it works towards the well being of all its members, fights exclusion and marginalisation, creates a sense of belonging, promotes trust, and offers its members the opportunity of upward social mobility.

Within this definition of ‘social cohesion’ there are three distinct aspects. These being social inclusion, social capital and social mobility.

- Social inclusion: is measured by aspects of social exclusion such as poverty, inequality, acceptance, and social polarisation.
- Social capital: combines measures of trust (interpersonal and society), the extent of personal networks, and the extent of an individual’s engagement within a community.
- Social mobility: measures the degree to which people can, or believe they can, change their position in society.

Self-Assessed Health Status¹⁸

In 2012, the Australian Bureau of Statistics released a range of social capital indicators from the 2010 General Social Survey (GSS). These indicators compared sport participants versus non-sport participants within the Australian population.

Respondents to the GSS were asked to make a general assessment of their own health against a five point scale ranging from excellent through to poor.

2: Social Contribution

SOCIAL CAPITAL

In 2012 the Australian Bureau of Statistics released a range of social capital indicators from the 2010 General Social Survey (GSS). These indicators compared sport participants versus non-sport participants within the Australian population.

Social capital is defined as being **“a resource available to individuals and communities founded on networks of mutual support, reciprocity and trust”**.

Social capital can contribute to both individuals (via outcomes in health, education, employment and family wellbeing) and communities (community strength and resilience).

It is theorised that participating in sport develops social capital due to the community based social interaction that this involves.

The ABS suggests that whilst it is not possible to establish a causal link between sport participation and social capital, it is possible to establish correlations between the two.

From selected indicators of social capital (see adjacent table), it can be seen that Australian golfers in comparison to both general sport participants and non-sport participants are healthier, more engaged with their local community, and have closer relationships with their social networks.

Each of the social capital indicators in the adjacent table is presented in more detail over the following pages.

Social Capital Indicators

Social Capital Indicator	Australian Golfers	Sport Participants	Non-sport Participants
Self-Assessed Health Status (% Excellent/Very Good)	59%	57%	40%
Personal Stressor (% that have not experienced personal stress)	47%	37%	44%
Work-life Balance (% can meet family/community responsibilities)	99%	92%	87%
Volunteership (% that volunteer within the community)	63%	42%	19%
No. of Confidants (% with 3 or more friends to confide in)	60%	58%	37%
Contact with Social Networks (% with weekly face-to-face contact)	80%	81%	73%
Social Network Diversity (% with friends of diverse ethnicity)	82%	77%	67%
Access to support (% able to ask for small favours)	95%	94%	88%

2: Social Contribution

SPORT AND SOCIAL CAPITAL IN AUSTRALIA - SELECTED INDICATORS

SELF-ASSESSED HEALTH STATUS			
	Australian Golfers	Sport Participants	Non-sport Participants
Excellent	16%	22%	13%
Very Good	43%	35%	27%
Good	31%	30%	32%
Fair	9%	11%	18%
Poor	1%	3%	9%
Total	100%	100%	100%

PERSONAL STRESSOR			
	Australian Golfers	Sport Participants	Non-sport Participants
Experienced a personal stressor	53%	63%	56%
Did not experience a personal stressor	47%	37%	44%
Total	100%	100%	100%

WORK LIFE BALANCE*			
	Australian Golfers	Sport Participants	Non-sport Participants
Can meet responsibilities	99%	92%	87%
Can not meet responsibilities	1%	8%	13%

* Of those with family/community responsibilities

VOLUNTEERSHIP			
	Australian Golfers	Sport Participants	Non-sport Participants
Volunteers	63%	42%	19%
Not volunteers	37%	58%	81%
Total	100%	100%	100%

2: Social Contribution

SPORT AND SOCIAL CAPITAL IN AUSTRALIA – SELECTED INDICATORS

NO. OF CONFIDANTS			
	Australian Golfers	Sport Participants	Non-sport Participants
None	4%	10%	23%
1-2 friends	36%	32%	40%
3-4 friends	36%	32%	23%
5 or more friends	24%	26%	14%

SOCIAL NETWORK DIVERSITY*			
	Australian Golfers	Sport Participants	Non-sport Participants
Friends with same ethnic background	15%	23%	33%
Friends of similar age	5%	9%	17%
Friends with same level of education	5%	12%	16%

* % All Friends of same level

CONTACT WITH SOCIAL NETWORKS*			
	Australian Golfers	Sport Participants	Non-sport Participants
Everyday	22%	21%	19%
At least once a week	58%	60%	54%
At least once a month	15%	14%	17%
At least once in three months	3%	4%	7%
No recent contact	2%	1%	3%

* Face-to-Face contact

ACCESS TO SUPPORT			
	Australian Golfers	Sport Participants	Non-sport Participants
Are able to ask for small favours	95%	94%	88%
Are able to ask for support in a crisis	95%	95%	90%

2: Social Contribution

QUALITATIVE ASSESSMENT – STRENGTHS OF GOLF AND IMPORTANCE TO COMMUNITIES

Qualitative assessment of the social cohesion generated through the Australian golf community

Depth interviews with 18 individuals actively involved in the golf community were conducted to identify golf's unique strengths in delivering social benefits to individuals and the community.

These depth interviews included interviews with 4 x Golf Club Managers and Staff, 7 x National/State/Territory Managers, 3 x Golf Industry & Tourism professionals, 2 x Community/Volunteers, 2 x Local Government Authority employees.

Whilst golf, like all sports, delivers a broad range of social benefits, the following are some of the sport's unique strengths.

Strengths of the sport

A range of positive aspects were identified through our interviews, and while some of these are obvious, they will assist with identifying the social impacts of the game and provide some clarity on the brand essence. At the core of the game is;

- Golf is the **number one sport for adults 45 years and over**, by a long way. (Golf 504,000; Tennis 189,000; Bowls 184,000) ²¹
- The **health benefits gained from the sport**; the walking, socialisation, and the physical activity for a sustained period – the seven to nine kilometres of walking that many **would not do without the connection to golf**.
- The sport is **played around the world in over 50 countries**. No matter where you travel, you can connect with people through golf.

- Golf can be **played by all ages, from 5 to 95**. Very few other sports can have a child compete against people in their 80's or 90's.
- The **connection to the outdoors and nature** on the golf course is fast becoming the only time many spend in green open space.
- Golf provides **both competitive and non-competitive opportunities**. You can choose to play in a competition and compete against others, or you can choose to play for the enjoyment of the game.
- The game **teaches life skills to younger players**. They include respect, appropriate behaviour and honesty.
- Many clubs are **now providing a café style experience**, both for participants and the general public (revenue stream). This complements the social connection that is achieved by engaging in the sport.

Importance to local communities

- Golf clubs, courses and activities are often undervalued. In many rural and regional areas **they are recognised for their contribution to the local community**. Such as being a social hub, providing fundraising activities, and free golf for community groups.
- Increasingly, clubs that provide **cafés are seeing an increase in patronage**. Many are becoming a meeting place not only for golfers but many non-golfers from the local community.
- Golf clubs and courses are often **a large employer within a local community**.
- Golf clubs often **use local suppliers from their community**, whether that be food and beverage or local trades.

2: Social Contribution

SOCIAL IMPACT OF GOLF

- The **social connection between members** of the golf community **cannot be underestimated**. There are many examples of how this connection provides extensive mental health benefits to those involved.
- Many **older golfers** note that the bulk of their **friendship group belong to their golf club**.
- Golf clubs and courses are often the **venue for many social events**, thus providing a social hub for the local community. Many clubs host birthday parties, weddings, corporate functions, other sports functions, even funerals.
- Golf provides a **high value experience** for many locals by bringing people together and providing a social connection.
- Some clubs and courses **host community events**. For example; hosting the local fire brigade for a social event to thank them for their contribution to the community; and hosting a primary school fundraiser through an outdoor cinema on the fairway.
- Golf **industry expertise** is now being shared with the local community. For example ground staff from one course now maintain the local school oval and local football/cricket club oval.



2: Social Contribution

Bakers Hill Golf Club

For 40 years the Bakers Hill Golf Club has been running a well-established junior programme. The Club's philosophy is simple – make golf as accessible as possible for children.

Background

- The program is run by junior coordinator Suzanne Waters and coach Dave Cockman, and has primarily involved opening up the course up to children on Saturday mornings and providing them with all the equipment they need – for free.

Initiative

- The focus of the program is to get kids involved in golf who perhaps wouldn't be playing another sport.
- The senior club paid for the shed that houses the kids' equipment, and the President has also helped supply equipment from his Drummond Golf store in Cannington, in addition to donations from elsewhere.

Outcome

- The club currently boasts 41 MyGolf junior members – a significant number for such a small town.
- Last year, coach Dave Cockman was nominated for a Regional Volunteering Award.
- In July this year, the Club was recognised for their efforts, being named the MyGolf centre of the month.

Reference

<http://www.golf.org.au/newsdisplay/97727>



Key learnings

- Actively encouraging junior participation on a Saturday morning drives golf participation and club involvement from a young age.
- A change in mindset to encourage juniors provides clubs with a future member base and instills a life-long love of the sport.

2: Social Contribution

SwingFit

Swing Fit is a fun, healthy and social way for women to learn and develop golf skills. Some success stories from the program are outlined below that demonstrate how Swing Fit has empowered women to take up golf when previously they would not have.

An Adelaide mother's "fear of missing out" on what was becoming a fun family activity encouraged her to take up Swing Fit.

Jenny's children aged 6 and 10, are both involved in the MyGolf program, while her husband also plays. The three of them would often go and practice together, leaving Jenny feeling like she was missing out as she couldn't play.

This was the inspiration that encouraged her to learn golf by enrolling in a Swing Fit program at Adelaide Shores Golf Course.

"I had never played golf before. Swing Fit has been a great way to get me started, so I can now go out on weekends and enjoy golf with my family."

Living in Scottsdale, Tasmania, Cath recently accompanied her friend to a Swing Fit program.

"My friend was really keen to get into golf, but me not so much," Cath admitted. "I always thought golf was too hard as I didn't know anything about the sport, nor did I have any idea on how to hit!"

Cath's perception of golf and belief in her skill-set soon changed after completing a six-week Swing Fit program.

"I started to think maybe I can do this and, before I knew it, I had invested in my first ever set of clubs and was enjoying nine holes with my friend and my husband!"

Cath's children, aged eight and 11, are just starting golf and her husband already plays.



Key learnings

- Empowering women to take up golf opens up the game to a new demographic that increases club participation, membership and revenue.
- The Swing Fit program encourages women to learn the skills of golf, allowing them to become actively involved in social and family activities.

2: Social Contribution

MyGolf Ambassador Program

The MyGolf School Ambassador Program aims to resource and recognise teachers for their efforts in promoting and delivering MyGolf School programs within their local school community.

Background

- Launched in August 2017, the initiative developed by Golf Australia and the PGA of Australia aims to make golf easier and more accessible for teachers to deliver, while providing a reward for their effort.

Initiative

- MyGolf school ambassadors have exclusive access to the newly developed MyGolf School Coaching Resource App.
- The app contains interactive manuals that teachers can use to deliver fun and engaging programs to children in grades 3-10. It also features interactive video, teaching points and fun, skill-based games.
- MyGolf school ambassadors also receive access to professional development opportunities in their state, access to tickets to attend golf events in their state and regular e-newsletters with valuable coaching tips.

Outcome

- The program has already gathered huge interest from teachers across the country with a total of 955 registrations across Australia for the program.
- The App has had 961 impressions, and 348 app units are being used in the country.

Reference

<http://www.mygolf.org.au/news-display/mygolf-school-ambassador-program-tees-off/92456>



Key learnings

- Adapting coaching delivery resources to include digital formats and platforms encourages new, fun and engaging programs for children.
- This will assist in growing the sport at a grass roots level and improve the accessibility of golf for future generations.

2: Social Contribution

KDV Sport

Carrara Gardens Golf Course had been in existence for over 35 years (since 1985). The KDV Group acquired the Carrara Gardens Golf Course in 2011 with the aim of building an international quality sports academy.

Background

The Carrara Gardens Golf Course was acquired in 2011 by the Shtengelov family, with a vision to build a golf and tennis academy. Inspired by the world-class academies in Europe and the United States, the facility was planned to be used by both Gold Coast families and social sports, as well as the pros.

Initiative

The KDV Sport facility encourages the participation of all ages, giving members of the local community the opportunity to take part in various sporting activities, socialise and have fun with family and friends.

Outcome

Today, KDV Sport is a modern, state of the art sporting complex containing:

- 12 hole golf course.
- 20 tennis courts.
- Mini golf.
- Kids parties with BBQ facilities .
- Full range of golf & tennis pro shops.
- 20 undercover driving ranges.
- Gym, sauna and 20 metre pool.
- Restaurant and function room.

Reference

- <https://www.kdvsport.com/>



Key learnings

- Developers and investors are looking to create multi-sport hubs (that include golf), within community centres in order to increase family and community participation.
- Allowing community members access to world-class facilities drives participation and engagement opportunities.

2: Social Contribution

Moore Park Golf Course

Moore Park Golf was the first public access golf course in NSW. Located only a 10 minute drive from Sydney's CBD, it is now one of Australia's leading public golf entertainment complexes.

Background

Since the course was established in 1913, it has always been focussed around being the "people's golf course". In 1996, the course was fully re-constructed with additional facilities built in including a 60 bay, three-tiered driving range practice facility.

Initiative

Moore Park Golf is a strong supporter of juniors, seniors and women's participation in the sport.

- The Sydney Golf Academy (located on-site) is Australia's busiest golf school.
- 16 local schools participate in regular sports and recreation programs on-site.
- The Club will host the U.S. Kids Golf Australian Open in January 2017.

Moore Park also has a disability inclusion initiative, which involves the introduction of the Paragolfer, a special mobility device that extends golf to people with disabilities.

Outcome

A discounted rate for Seniors and emphasis on providing accessibility upgrades across the course has led to a 4% year-on-year increase in participation.

Reference

- <http://blog.centennialparklands.com.au/best-public-golf-facility/>



Key learnings

- Local golf clubs and facilities can drive junior, senior and inclusion initiatives that increase community engagement.
- Inviting minority groups to use club facilities strengthens the community and club connection, and provides additional revenue and funding sources for clubs.

2: Social Contribution

Cockatoo Rise Retreat

Situated 5.75 kilometres from Bairnsdale in the Gippsland Lakes area of Victoria, Cockatoo Rise retreat provides a free facility for war veterans and their partners to share time with each other and their mates. The retreat mainly caters for war veterans who need a quiet and peaceful location for support.

Background

- The retreat has a 9 hole golf course and walking areas on the 50 acres, an area for camp fires and BBQ's, a veggie garden, a croquet rink and a museum.
- The museum contains a substantial collection of uniforms from World War I through to Afghanistan, and has begun lending its displays to local shopping centres to give the public an opportunity to pick them up and provide a closer connection.

Initiative

- The retreat is owned and operated by Annie and Greg Carter (a Vietnam veteran), who opened their abode and its surroundings to all Australian veterans in 2010. The idea was to create a relaxed environment in which visitors would feel stress-free and welcome.
- The retreat is supported by numerous local businesses and sponsors, and also welcomes donations that go towards upkeep of the property.

Outcome

- Cockatoo Rise welcomes eligible golfers visiting the area to use the course, even if they are not staying there, at no charge .
- It also welcomes Returned Service golfing groups with Golf carts, clubs, etc, available for use.

Reference

- <http://www.cockatooisere retreat.com.au>



Key learnings

- There are a growing number of golf programs that assist in improving mental and physical health outcomes for war veterans.
- Providing golf opportunities to war veterans and their families attracts support from local businesses and the broader community.

2: Social Contribution

Inclusive Golf in the City of Adelaide

The North Adelaide Golf Course run an inclusive golf program as part of a collaboration with the City of Adelaide, Golf SA and Inclusive Sport SA.

Background

The Inclusion Golf Learning pathway was set to provide broader opportunities for people to enjoy the sport of golf. This program aims to teach and enhance skills in a safe comfortable environment.

Initiative

The most recent program saw five sessions with six students per class throughout June and July. This program was conducted at the Par 3 on Torrens located within the North Adelaide golf course precinct. The sessions were facilitated by North Adelaide PGA Teaching Professional Gavin Fontaine who has an inclusive coaching accreditation.

Outcome

Through the program, the North Adelaide Golf Club has demonstrated the holistic benefits of providing community programs. The participants are learning new skills and having fun with other students, and club has developed new partnerships which will enable the program to grow over time.

References

- <http://www.golfsa.com.au/news-display/inclusive-golf-in-the-city-of-adelaide/97696>, and;
- <http://www.northadelaidegolf.com/coaching/inclusion-golf-learning-pathways/>



Key learnings

- Golf can build confidence and friendships through the programs, creating healthy and inspiring environments.
- These community programs are a fantastic opportunity for golf clubs to develop relationships with other organisations such as City of Adelaide, Golf SA and Inclusive sport SA.

2: Social Contribution

Tambellup Golf Club Turn-around

The Tambellup Golf Club has more than doubled its weekly playing fields through a new approach to the game.

Background

In 2013, the club averaged only 10 players in its Saturday field and the club committee realised that without change, the club would not survive. Being in a remote area with only a Hockey Club (since the football club had recently folded), the club was determined to take a new approach.

Initiative

The club looked at the local community of farmers (who were increasingly time-poor) and young families (whose children were playing sport out of town on Saturday mornings). These insights led the club to making a 9-hole comp on Saturday afternoons, hosting a come-n-try style women's event, and starting a monthly community function or burger night.

Outcome

The club now has 57 members and 25 players in its Saturday 9-hole comp. It is also building its reputation in the community by hosting charity events and running putting and hole-in-one competitions to help raise money.

Reference

- Ripe Magazine. Issue: May 2017



Key learnings

- Club volunteers and committees can sometimes wait until it's too late to make some serious changes to the way they are operating.
- Having the courage to try a new model which is based on local market insights may be the key to a successful turnaround.

2: Social Contribution

Pennant Hills Golf Club Fundraising Events

ASX Thompson Reuters Charity Foundation organise customer entertainment and networking events to raise money for charity. Each year ASX Thompson Reuters have distributed over \$1 million to 20 or so children's, disability and medical research charities.

Background

- Pennant Hills Golf Club is known as Sydney's Business Golfing venue. Employing a dedicated PGA golf professional with the sole purpose of making your business, group or charity golf event everything that you want it to be.

Initiative

- The Golf Club's main event for the year is the ASX Thompson Reuters Charity Foundation Golf Day, which they have hosted for the last 31 years.
- The annual event named the Financial Markets Charity Golf Day and Gala Dinner has grown to become the biggest charity golf day in Australia.

Outcome

- The most recent event was held on 23rd and 24th of February 2016. The event was a huge success, raising \$1.5 million for 30 charities.
- The 2018 event is expected to host 360 golfers and be supported by 200 different sponsors.

References

<http://www.asxreuterscharity.com.au/index.php?q=about-us>

<http://www.pennanthillsgolfclub.com.au/cms/corporate/information/>



Key learnings

- This example is just one of many that highlights the contribution the golf industry makes towards charity and not-for-profit organisations.
- The work that many clubs do within the community is often under-reported, yet provides crucial funding and support to local businesses and not-for-profit organisations.

2: Social Contribution

SOCIAL STORY TELLING FROM RESPONDENTS

"It's a game that can be played by all ages; from 5 to 85, 95 or indeed 105. There are not many sports that can have a child compete against their parent or grand-parent"

Golf Administrator.

"Being a defence member, who has served for over 25 years, golf has always given me the opportunity to become involved in the local community. I have constantly been posted around Australia and have always joined my local golf club. Not only for the golf, but the ability to meet and feel like a true member of the community."

Golfer.

"We have one particular group of around 70 older men, who play every week and have a real social connection to each other. If one of them is sick, the others will arrange help. If they can't physically play they still come along to enjoy the company of their mates."

Club GM.

"Golf is like a 'tribe', no matter where you go in the world, you will find someone to connect to through golf."

Golf Administrator.

"The biggest impact golf has had on my life is being able to spend quality time with my teenage daughter. Our relationship at golf is not one of parent/child, but as golfing buddies because we are equals. This provides the perfect opportunity to bond. Golf treats people as equals no matter their age, race, religion or sex."

Golfer.

"The volunteering components are fantastic, the Dad's armies and working bees, volunteering and giving back into a Club. It all provides a sense of ownership, a second family who meets at the club. A sense of pride and belonging to a club and helping out – it all makes a difference. It is very important to the game and adds to club spirit and the sense of enjoyment. They don't do it begrudgingly, they love it,"

Golf Administrator.

2: Social Contribution

SOCIAL STORY TELLING FROM RESPONDENTS

"Golf to me is a very big release as I live on a farm, so golf gives me the social interaction I need to communicate with other people on a social level."

Golfer.

"I am retired, but my wife is still working. My days are spent at home with the dog doing domestic chores. Golfing twice a week is awesome socially. I now volunteer in a crew of five for our greenkeeping staff. Three hours on a Monday morning, it's very rewarding and a huge amount of fun."

Golfer.

"I met my partner of 2 ½ years at the golf club. After many afternoons of practice he managed to work up the courage to (ask me out on) his version of a date being, 'let's go to the range and have dinner'. We have just purchased our first unit together in the crazy Sydney market... been given the hurry up as I am late for tonight's date at the range – adios!!"

Golfer.

"Golf is a community in so many aspects. Even if you're not a member of a club, if you play golf, you have an understanding. Golf is already that tribe of people that have a common interest. Our percentage of engagement is so high because people are so passionate about the game."

Golfer.

"It's like when you're skiing, and you're at the top of the mountain, in the clouds, and it's just you... It's the same with golf, when you're setting up your tee, looking out over the ocean or the sand dunes. It just feels pure. It makes you stop and take it all in for a moment."

Golfer.

"It's fun for all ages and becoming more gender neutral. It's flexible in how it is delivered and priced, from putt-putt to clubs, accessible options are available. It is very social, great support networks exist. The well-being impact, fresh air and open spaces. Belonging to a club with a group of friends, provides social positioning and the positives around social health and mental well-being."

Golf Administrator.

2: Social Contribution

SOCIAL STORY TELLING FROM RESPONDENTS

“A player has to be well organised, maintain some social skills, play shots, work out and think about scoring, using social discussion is very important. He or she is often competing against themselves or within a group and on top of that, they are walking 8-10 kilometres to boot!”

Golfer.

“Its an incredibly important game and the biggest benefits are that it has major social and health benefits. We have seen first hand the impact of regional clubs and the impact of a club and its footprint in the local community. The opportunity to get out of the hustle and bustle. We don’t promote the health benefits enough, the diabetes and heart benefit, it’s a hidden gem.”

Golf Administrator.

“There are 4 staff members who have over 100 years of service between them. They know everyone, they know that Doris orders a club squash every time she’s in – that is intangible.”

Club GM.

“Golf clubs are seen as a very valuable part of the local community, especially for regional towns. One club provided a free day of golf for the local fire brigade. And another organised a ‘night cinema’ on the fairway for local community.”

Golfer/Club Volunteer.

“Golf provides a method of connecting to the community outside of the work and family environments. It also gives an instant connection when moving to a new location, nationally or internationally. Volunteer work drives a small country club like ours, strengthening pride in belonging. It’s more than a game!!”

Golfer.

“It enables different people of different demographics to meet each other and play sport – a cemetery worker, a doctor and an accountant and plumber – and all have something in common.”

Club GM.

2: Social Contribution

SOCIAL STORY TELLING FROM RESPONDENTS

“One of the ground staff passed away un-expectedly and the club not only provided the family with a venue for the memorial – they also held a fundraiser to help his family financially – that’s the power of local clubs.”

Golfer.

“Our club has really changed focus in terms of growing the game. The ‘good old days’ of expecting members to join the club because their parents are members have gone. We are now proactively engage our local community through partnerships with the local primary school, footy club, CFA and local charitable organisations. We give back because it drives interest in the club.”

Club GM.

“Getting out in the fresh air, enjoying the environment, playing and walking for 4 or 5 hours – I can’t see how it can be a bad thing for you, your body or mind. It’s an opportunity to converse with your mates and friends. You get things off your chest – and it’s where you get out and talk to somebody and socialise.”

Golfer/Club Volunteer.

“The sheer size of the green footprint, the green open spaces and inherent community value via clubs and facilities, will only increase as development pace grows. These green spaces are important to the community.”

Golf Administrator.

“The games values are fantastic. There are strong expectations that people will behave well. These values are linked to the game as well. The respect, the behaviour, the standards expected – all of these learnings are provided by the game and are transferable to life.”

Club CEO.

“Developing a four-hole course for the local school has a wonderful impact on the students. We have been able to provide a new sporting and education experience for kids who are not interested in playing the traditional game.”

Course GM.

2: Social Contribution

SOCIAL STORY TELLING FROM RESPONDENTS

“Our café has become the social hub of the local community. We have a large number of non-golfers who meet their friends here, just to enjoy the environment and good coffee...”

Club GM.

“We have a lot of millennials that visit our facility for the mini-golf and café experience – boys, girls, families, they all come to enjoy the unique offer we have.”

Course GM.

“We do enormous stuff in this area - \$100k over 4 years. There are not many activities where you can have a fundraising activity and day and play sport (golf) with people who you may not know and raise a lot of money for charity.”

Club GM.

“The eco-system of the game, the agronomy, the PGA traineeships, the importance of Boards and decision making, apprentice chefs, golfers and mechanics – and superintendents – these all create opportunities to be involved with the game for fun and for life.”

Golf Administrator.

“We definitely give opportunities to locals that they wouldn’t have otherwise had. We put our staff through TAFE courses, giving them training.”

Golf Administrator.

“Golf is a sport which is full of employment opportunities. You have hospitality for university students, green keeping for apprentices, administration, coaching, retail, etc. We all know you can play for life, but not many realise you can also have an entire career in the industry too.”

Golfer.



Main Report - 3: Health Contribution

3: Health Contribution

VALUATION APPROACH – PHYSICAL AND MENTAL HEALTH

The following provides an overview of the conceptual methodology used to calculate the health benefits derived from golf participation. The approach is similar to many previous whole of sport industry studies, and includes data input from the Australian Institute of Health and Welfare and the Australian Government Department of Health.

Physical Health

- Evidencing the negative effects of insufficient physical activity. The 2011 study by the Australian Institute of Health and Welfare ¹ **attributed 5.0% of the burden of disease in Australia to physical inactivity.** The specific diseases resulting are breast cancer, coronary heart disease, diabetes, bowel cancer and stroke.
- Identifying the total number of Disability-Adjusted Life Years (DALYs) lost due to diseases caused by physical inactivity, and then calculating the equivalent contribution from a per person perspective.
- Understanding the expected life duration based on current age and gender segments, as well as the average duration in years of golf participation.
- Calculating the Value of a Statistical Life Year (VSLY) based upon Department of Finance best practice guidelines. The **VSLY used is \$187,240⁷.**
- Modelling the actual number of golf participants (across age and gender segments).

- The basic formula for calculating physical health benefits is therefore: $\text{Physical Health} = \text{No. of Participants} \times \text{DALYs prevented} \times \text{VSLY} \times (1\text{-year of golf Participation/Expected Life Remaining}).$

Mental Health

Calculating the mental health benefits was similar to the method used to calculate physical health, with a number of adjustments as follows:

- Evidencing the preventative effects of physical activity on anxiety and depression. Based upon the evidence used by the Australian Government Department of Health to support the current Physical Activity & Sedentary Behaviour Guidelines for Adults (18-64 years)², **we have used** the conservative estimated range that physical activity has **a 25% preventative impact** on anxiety and depression.
- Identifying the total number of Disability-Adjusted Life Years (DALYs) lost due to anxiety and depression, and then calculating the equivalent contribution from a per person (by age and gender) perspective.
- The basic formula for calculating mental health benefits is therefore: $\text{Mental Health} = \text{No. of Participants} \times (\text{DALYs from anxiety and depression/preventative effect of physical activity}) \times \text{VSLY} \times (1\text{-year of golf Participation/Expected Life Remaining}).$

3: Health Contribution

ANNUAL HEALTH CONTRIBUTION

Australian Golf Members

ANNUAL HEALTH CONTRIBUTION – GOLF MEMBERS			
Participant Segment	Physical Health Benefit	Mental Health Benefit	Total Health Benefit (Yr)
Male 0-14 years	\$0	\$24,381	\$24,381
Male 15-24 years	\$0	\$239,278	\$239,278
Male 25-64 years	\$6,799,519	\$1,253,558	\$8,053,077
Male 65-74 years	\$23,047,608	\$0	\$23,047,608
Male 75+ years	\$56,104,597	\$0	\$56,104,597
Female 0-14 years	\$0	\$5,979	\$5,979
Female 15-24 years	\$0	\$100,176	\$100,176
Female 25-64 years	\$1,055,965	\$382,353	\$1,438,318
Female 65-74 years	\$3,098,519	\$1,940,526	\$5,039,045
Female 75+ years	\$10,301,273	\$0	\$10,301,273
Total	\$100,407,481	\$3,946,251	\$104,353,732

393k individuals \$265 per person (per year)

Social Players

ANNUAL HEALTH CONTRIBUTION – SOCIAL PLAYERS			
Participant Segment	Physical Health Benefit	Mental Health Benefit	Total Health Benefit (Yr)
Male 0-14 years	\$0	\$6,835	\$6,835
Male 15-24 years	\$0	\$28,117	\$28,117
Male 25-64 years	\$2,308,760	\$425,642	\$2,734,402
Male 65-74 years	\$5,862,452	\$0	\$5,862,452
Male 75+ years	\$14,277,119	\$0	\$14,277,119
Female 0-14 years	\$0	\$1,676	\$1,676
Female 15-24 years	\$0	\$11,771	\$11,771
Female 25-64 years	\$358,542	\$129,824	\$488,366
Female 65-74 years	\$788,129	\$493,586	\$1,281,715
Female 75+ years	\$2,621,225	\$0	\$2,621,225
Total	\$26,216,227	\$1,097,451	\$27,313,678

628k individuals \$43 per person (per year)

3: Health Contribution

LIFETIME HEALTH CONTRIBUTION

Australian Golf Members

LIFETIME HEALTH CONTRIBUTION – GOLF MEMBERS			
Participant Segment	Physical Health Benefit	Mental Health Benefit	Total Health Benefit (Yr)
Male 0-14 years	\$0	\$133,454	\$133,454
Male 15-24 years	\$0	\$1,838,094	\$1,838,094
Male 25-44 years	\$169,987,976	\$31,338,950	\$201,326,926
Male 45-64 years	\$829,713,892	\$0	\$829,713,892
Male 65+ years	\$2,244,183,874	\$0	\$2,244,183,874
Female 0-14 years	\$0	\$41,852	\$41,852
Female 15-24 years	\$0	\$701,234	\$701,234
Female 25-44 years	\$15,839,473	\$5,735,302	\$21,574,775
Female 45-64 years	\$71,265,927	\$44,632,105	\$115,898,032
Female 65+ years	\$412,050,910	\$0	\$412,050,910
Total	\$3,743,042,052	\$84,420,991	\$3,827,463,043

393k individuals \$9,715 per person

Social Players

LIFETIME HEALTH CONTRIBUTION – SOCIAL PLAYERS			
Participant Segment	Physical Health Benefit	Mental Health Benefit	Total Health Benefit (Yr)
Male 0-14 years	\$0	\$47,847	\$47,847
Male 15-24 years	\$0	\$168,700	\$168,700
Male 25-44 years	\$41,557,671	\$7,661,564	\$49,219,235
Male 45-64 years	\$170,011,099	\$0	\$170,011,099
Male 65+ years	\$385,482,224	\$0	\$385,482,224
Female 0-14 years	\$0	\$6,704	\$6,704
Female 15-24 years	\$0	\$129,486	\$129,486
Female 25-44 years	\$4,302,503	\$1,557,890	\$5,860,393
Female 45-64 years	\$3,152,517	\$1,974,344	\$5,126,861
Female 65+ years	\$65,530,623	\$0	\$65,530,623
Total	\$670,036,637	\$11,546,535	\$681,583,172

628k individuals \$1,085 per person

3: Health Contribution

DATA SOURCES

The following data sources have been used as key inputs into the approach towards valuing the health contribution of golf. Each data source is presented in more detail over the following pages.

Physical health sources

- Health care expenditure in Australia.
- Health care expenditure on Disease.
- The cause of disease in Australia.
- The burden of disease due to physical inactivity.
- Disability-Adjusted Life Year (DALY).
- DALYs attributed to physical inactivity.
- Value of a Statistical Life Year (VSLY).
- Recommended physical activity levels.
- Average life expectancy and duration of golf participation.

Mental health sources

- Health care expenditure on mental disorders.
- The cause of disease in Australia.
- The prevention of anxiety and depression.
- DALYs caused by anxiety and depression.



3: Health Contribution

PHYSICAL HEALTH DATA INPUT

Health care expenditure in Australia³

According to the AIHW total health expenditure on goods and services in Australia was \$161.6 billion in 2014-2015 (up by 2.8% from 2013-2014), which represents 10.03% of Gross Domestic Product (GDP) per annum. This total health care expenditure is an **equivalent of \$6,846 per person** in Australia.

Health care expenditure on disease⁴

Whilst not all health expenditure is allocated towards a specific category (such as disease) figures from 2008-2009 AIHW expenditure data show that approximately **12% of total** allocated health expenditure is spent on cardiovascular diseases (the highest expenditure category). This is followed by oral health at 10%, mental disorders at 8.5%, neoplasms (cancers) at 7% and diabetes mellitus at 2% of allocated expenditure.

The cause of disease in Australia¹

Cancer and cardiovascular disease are the two leading causes of disease in Australia, **accounting for 34% of all disease**. Whilst there are a range of risk factors that contribute to each disease group, physical inactivity is attributable to 3 of the top 10 diseases in Australia. This means sport participation is critical to the prevention of the overall burden of disease in the community.

Top 10 causes of disease in Australia		
Cause	% of all Diseases	% of Disease attributable to physical inactivity
Cancers	18.5	6.4
Cardiovascular disease	14.6	21.2
Mental disorders	12.1	-
Musculoskeletal	11.6	-
Injuries	8.8	-
Respiratory	8.3	-
Neurological	6.8	-
Gastrointestinal	3.2	-
Infant/Congenital	2.7	-
Endocrine	2.4	29.7

Source: AIHW.

3: Health Contribution

PHYSICAL HEALTH DATA INPUT

The burden of disease due to physical inactivity¹

In Australia, **31.5% of the burden of disease** can be attributed to **29 selected risk factors** (top 12 shown opposite). Of these risk factors, physical inactivity is the fourth highest cause at 5.0%, behind tobacco (9.0%); high body mass – obesity (5.5%); and alcohol use (5.1%).

These findings are taken from the Australian Institute of Health and Welfare (AIHW) study (2011). The data from this study is widely used in Australia to measure the burden of disease, and has also been used in many similar studies to this one, including Muller et al (2010)⁵ and Access Economics (2010)⁶.

The AIHW study (2011) found five specific diseases which physical inactivity is an attributing factor. Breast Cancer, Coronary Heart Disease, Diabetes, Bowel Cancer and Stroke.

Disease burden attributable to top 12 risk factors	
Risk Factor	% Attribution
Tobacco	9.0
High Body Mass - Obesity	5.5
Alcohol Use	5.1
Physical inactivity	5.0
High blood pressure	4.9
Low fruit and vegetable Diet	3.4
High blood plasma glucose	2.7
High cholesterol	2.4
Occupational exposures and hazards	1.9
Diet high in processed meats	1.4
Diet low in nuts and seeds	1.4
Total*	31.5

Note*: the total is not cumulative as there is some overlap between risk factors

3: Health Contribution

PHYSICAL HEALTH DATA INPUT

Disability-Adjusted Life Year (DALY)¹

The Disability-Adjusted Life Year (DALY) is a single, consistent measurement of the years of life lost due to premature death and 'healthy' years of life lost. This measurement of the burden of disease is adopted and used by the World Health Organisation (WHO).

A study by AIHW (2011) found that 53% of the burden of disease impacts people between the ages of 15-64 years of age.

Distribution of age, disease and golf participation			
Age Group	Australian Population Distribution	Golf Member Distribution	DALY Population Distribution
0-14 years	18.8%	3%	6.0%
15-44 years	41.3%	24.4%	24.1%
45-64 years	24.6%	36.6%	29.3%
65-74 years	8.6%	23.1%	18.5%
75+ years	6.6%	12.9%	22.1%

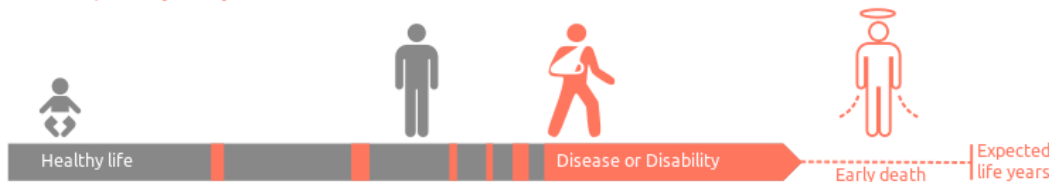
Source: ABS, AIHW., AGIC, SBP Calculations.

DALY

Disability Adjusted Life Years is a measure of overall disease burden, expressed as the cumulative number of years lost due to ill-health, disability or early death

$$= \text{YLD} + \text{YLL}$$

Years Lived with Disability + Years of Life Lost



3: Health Contribution

PHYSICAL HEALTH DATA INPUT

Disability-Adjusted Life Year (DALY) attributed to physical inactivity¹

Based upon the findings from AIHW (2011), it is possible to calculate the contribution of any given person, based upon their age and gender profile, to the DALYs lost as a result of physical inactivity.

Note - there is zero to very minimal DALYs lost due to physical inactivity for people between 0-24 years of age.

	Males					Females				
	0-14	15-24	25-64	65-74	75+	0-14	15-24	25-64	65-74	75+
DALYs attributed to Physical inactivity - Australian Population (A)	0	0	61,700	30,600	33,300	0	0	42,600	19,600	36,500
Australian Population, 2016 (B)	2,331,078	1,622,984	6,316,978	1,023,017	696,915	2,208,167	1,540,667	6,426,136	1,060,448	902,486
Ave. DALY per person (C) = (A/B)	-	-	0.010	0.030	0.048	-	-	0.007	0.018	0.040

Source: AIHW, SBP calculations.

3: Health Contribution

PHYSICAL HEALTH DATA INPUT

Value of a Statistical Life Year (VSLY)⁷

The value of a statistical life year in 2016 is \$187,240.

This figure is calculated based on best practice guidelines from the Australian Government (Office of Best Practice, Department of Finance) who calculated the VSLY in 2014 as \$182,000 plus the additional CPI calculation.

Some other studies have used a VSLY as high as \$252,014 based on a global literature review conducted by Access Economics in 2008. However SBP has chosen to use a conservative VSLY to ensure consistency with Australian government guidelines and common practice. If the higher VSLY had been used, the annual health benefit would increase from \$33.8 million to \$46.4 million in total (a \$12.6 million increase).

Recommended physical activity levels^{2, 8}

According to the Australia Government Department of Health, the current Physical Activity & Sedentary Behaviour Guidelines for Adults (18-64 years) are:

- Doing any physical activity is better than doing none. If you currently do no physical activity, start by doing some, and gradually build up to the recommended amount.

- Be active on most, preferably all, days every week.
- Accumulate 150 to 300 minutes (2 ½ to 5 hours) of moderate intensity physical activity or 75 to 150 minutes (1 ¼ to 2 ½ hours) of vigorous intensity physical activity, or an equivalent combination of both moderate and vigorous activities, each week.
- Do muscle strengthening activities on at least 2 days each week.

For health benefits to be achieved through physical activity, a person must meet the minimum recommended levels of 3 x sessions of at least 25 minutes vigorous exercise; OR 5 x 30 minutes of moderate exercise per week.

Whilst regulatory standards on the minimum recommended levels of exercise continue to evolve, it is these levels of the amount of physical activity that contribute health benefits that are representative of the currently available scientific evidence.

3: Health Contribution

PHYSICAL HEALTH DATA INPUT

Average life expectancy and duration of golf participation^{9,10}

The current life expectancy of individuals at their present age is shown in the table below. This has been calculated from ABS, 2015 Life Tables. It shows that a male who is currently 25 years of age is expected to live to 82 years of age, whilst a female 75 years of age is expected to live to 94 years of age.

The **expected average duration of golf participation** amongst all members (20 years) is **43% higher** than social (14 years).

The current average life remaining has been factored into the calculation of the physical health benefits of golf participation by valuing the contribution of one year of being physically active out of a person's remaining life.

Golf cannot claim to be the source of disease prevention for a person's entire life, however it will contribute preventative health benefits for their remaining life.

Gender/Age Group	Current Life Expectancy (Years) ⁹	Average Life Remaining (Years) ⁹	Member : Average Participation Duration (Years)	Social : Average Participation Duration (Years)
Male 0-14 years	81	74	5	7
Male 15-24 years	81	61	8	6
Male 25-64 years	82	38	25	18
Male 65-74 years	86	16	36	29
Male 75+ years	93	6	40	27
Female 0-14 years	85	78	7	4
Female 15-24 years	85	66	7	11
Female 25-64 years	86	41	15	12
Female 65-74 years	88	19	23	4
Female 75+ years	94	7	40	25
Mean no. of years	NA	NA	20	14

3: Health Contribution

PHYSICAL HEALTH DATA INPUT

Frequency of golf participation^{9,10}

Golf members participate more than those who are social players – both in the number of times played per year, and in the number of hours participated per week.

The disparity in the participation volume between members and non-members explains why a significant proportion of the physical health benefits of golf are generated by members.

Frequency of playing golf	Member Golfers	Social Golfers
Not at all	1%	1%
Less than 3 times	0%	3%
3-6 times	0%	6%
7-12 times	3%	11%
13-26 times	5%	18%
27-52 times	24%	29%
53-104 times	43%	20%
More than 104 times	24%	14%
Mean no. of times	67 times per year	8 times per year

Source: ABS, AusPlay, AGIC Survey, SBP Calculations

Hours per week playing golf (including practice)	Member Golfers	Social Golfers
None / NA	1%	8%
Less than 1 hour	3%	11%
1 - 3 hours	4%	15%
4 - 6 hours	25%	31%
7 - 9 hours	21%	14%
10 - 12 hours	20%	14%
13 - 15 hours	13%	4%
16 - 18 hours	5%	1%
19+ hours	8%	4%
Mean no. of hours/week	9.4 hours	6.2 hours

Source: AGIC Survey, SBP calculations.

3: Health Contribution

PHYSICAL HEALTH DATA INPUT

Number of individuals receiving health benefits

Whilst Golf Australia have accurate records of the number of members (reported in the 2016 Golf Club Participation Report to be 393,975), there is less consistent and reliable data on the number of Social Golf participants in Australia.

In order to determine the number of non-member participants, SBP utilised all publicly available data relating to golf participation and developed three distinct methods of calculation. The data sources used included : ABS sport participation data from 2011/2012, AusPlay data 2016, and the Golf Australia – Golf Club Participation Reports 2015 & 2016.

Key variables in these methods include Australia’s golf participation market, the percentage of all who participate casually, the number of Golf Australia members, and the proportion of the Australian population that participate in golf.

The calculations used to estimate the non-member golf segment are drawn from the ABS and AusPlay data. For the purposes of this report, we have utilised the average percentage of each of the segments.

Golf Segment	Number of participants
Male 0-14 years	24,531
Male 15-24 years	63,098
Male 25-64 years	452,685
Male 65-74 years	178,135
Male 75+ years	99,503
Female 0-14 years	6,133
Female 15-24 years	15,775
Female 25-64 years	113,171
Female 65-74 years	44,534
Female 75+ years	24,876
Total	1,022,441

Golf Segment	Number of participants
Club Members	393,975
Social Players	628,466
Total	1,022,441

Source: AGIC, AusPlay, SBP Calculations

3: Health Contribution

MENTAL HEALTH DATA INPUT

Health care expenditure on mental disorders⁴

Whilst not all health expenditure is allocated towards a specific category (such as disease) figures from 2008-2009 AIHW expenditure data show that approximately 8% of total allocated health expenditure is spent on mental disorders – this being the third highest disease expenditure category.

The cause of disease in Australia¹

Data from 2011 AIHW Burden of Disease report show, following cancer and cardiovascular disease, mental disorders are the third most common causes of disease in Australia, accounting for 12.1% of all disease. Within the mental disorder disease category, anxiety and depression was the largest specific cause, accounting for 6% of all disease.

Top 10 causes of disease in Australia	
Cause	% of all Diseases
Cancers	18.5
Cardiovascular disease	14.6
Mental disorders	12.1
Musculoskeletal	11.6
Injuries	8.8
Respiratory	8.3
Neurological	6.8
Gastrointestinal	3.2
Infant/Congenital	2.7
Endocrine	2.4

Source: AIHW.

3: Health Contribution

MENTAL HEALTH DATA INPUT

The prevention of anxiety and depression⁸

Based upon the evidence used by the Australia Government Department of Health to support the current Physical Activity & Sedentary Behaviour Guidelines for Adults (18-64 years), we have estimated that physical activity has a 25% preventative impact on anxiety and depression.

The 25% preventative impact has been used as a conservative estimate for a number of reasons. The Brown et al (2012) report identifies a range of studies which supported physical activity as protective against the onset of anxiety disorders and symptoms, with a reduction impact of 48-53%.

The Brown et al (2012) report also notes that there is substantial evidence that regular physical activity protects against the onset of depression symptoms and major depressive disorders. The reduction impact across a number of studies, was between 25-40% lower.

We note that the evidence used by the Department of Health to support the physical activity guidelines address anxiety and depression separately.

Given that we know the collective impact of anxiety and depression in terms of DALYs, and separately the preventative impact physical activity has on both anxiety and depression, we have chosen the lowest preventative impact (25%) in order to take a conservative approach.



3: Health Contribution

MENTAL HEALTH DATA INPUT

Disability-Adjusted Life Year (DALY) caused by anxiety and depression¹

The findings from AIHW (2011) show that anxiety and depression has a comparatively larger impact on a per person basis amongst the younger age groups, and females compared to males.

For the mental health aspects of this project we have calculated the number of DALYs caused by anxiety and depression that are likely to have been prevented due to participation in physical activity.

Across the 0-64 age segments, 49% of all DALY's lost due to anxiety and depression occur between the ages of 25-64, whilst 67% of all DALY's are lost to females.

	Males					Females				
	0-14	15-24	25-64	65-74	75+	0-14	15-24	25-64	65-74	75+
DALYs caused by Anxiety and Depression - Australian Population (A)	10,400	14,800	45,500	0	0	10,200	25,100	61,700	49,100	0
DALYs prevented due to participation in physical activity (B) = (A x 25%)	2,600	3,700	11,375	-	-	2,550	6,275	15,425	12,275	-
Australian Population, 2016 (C)	2,331,078	1,622,984	6,316,978	1,023,017	696,915	2,208,167	1,540,667	6,426,136	1,060,448	902,486
Ave. DALY prevented per person (D) = (B/C)	0.0011	0.0023	0.0018	-	-	0.0012	0.0041	0.0024	0.0116	-

Source: AIHW, SBP calculations.

Note- Anxiety and Depression do not appear in the top 10 risk factors for males over 65 y.o and 75 y.o for females

3: Health Contribution

Inclusive Coaching Accreditation

In February 2017, the Barwon Heads Golf Club hosted a PGA Blind and Disabled Coach Accreditation training workshop, facilitated by fellow PGA Professional and Golf Australia National Inclusion Manager, Christian Hamilton.

Background

- The two-day accreditation program, proudly supported by ISPS HANDA, addressed the skills and attributes an inclusive coach requires, and also how to effectively build programs where participants feel included, comfortable and challenged.

Initiative

- The strategy allows accredited PGA professionals to be recognised through the beginner golf pathway as being the ideal venue and coaching facility for golfers with a disability to get expert advice.
- Hamilton spoke about the importance of programs and facilities being flexible in design to allow everyone to participate.
- “Just as important is the role the club or facility plays in supporting new golfers to the game. We also discussed what an inclusive facility looks like and the importance of a whole club approach toward inclusion.”

Outcome

- Since the first accreditation workshop in 2016, 51 PGA Members have been accredited which has seen 2,664 participants with a disability through programs. 2016/2017 saw the PGA embed Inclusive Coaching and Inclusive Facilities Workshop into the Year 2 curriculum on an ongoing basis. 200+ Australian PGA Trainees have completed the academy workshops in 2017.

Reference

<http://www.pga.org.au/news/education/pga-professionals-add-inclusive-techniques-to-coaching>



Key learnings

- The introduction of inclusive coaching accreditation programs will ensure that more golfers with a disability can access the sport.
- Providing opportunities to players with a disability will open up participation pathways and strengthen community and club relationships.

3: Health Contribution

Golf and Health Project

In October 2016, the World Golf Foundation launched the Golf and Health Project. The project aims to academically research and highlight how the sport can benefit people's lives.

Background

- Researchers at the University of Edinburgh in Scotland, conducted the largest, most comprehensive study of golf and health, with the results shown in a Scoping Review published in The British Journal of Sports Medicine. In total, 5,000 papers were reviewed to provide a comprehensive view on the impact of the game on health, illness prevention and associated injuries.

Initiative

- The project has international support and its own dedicated website that posts regular updates on the project and its findings.
- Findings have covered the physical, psychological, social & well-being, spectating, and injury prevention benefits.

Outcome

The research has found that key benefits of golf participation include:

- Improved life expectancy and quality of life.
- Mental health benefits.
- Decreased risk of more than 40 major chronic diseases like type 2 diabetes, heart attacks, colon and breast cancer.
- Positive impacts on cholesterol, body composition, metabolism, and longevity.

Reference

<http://www.golfandhealth.org/>



Key learnings

- The findings from this report support and strengthen the existing evidence base, highlighting the health and well-being benefits of golf.
- This includes an increase in life expectancy, a decreased risk of major chronic diseases and positive impacts on social well-being.

3: Health Contribution

Inclusive Participation Programs

An England Golf study in 2015 revealed that 80% of golfers with a disability in the UK want to reconnect with mainstream participation pathways. This is consistent with ASC AusPlay Research into sports participation for people with a disability in Australia.

Background

- Golf Australia recognises the importance of providing dual pathways for golfers with a disability, giving them the choice to participate in either mainstream or disability specific sporting programs.

Initiative

- Golf's National Junior Participation Program, MyGolf has been developed with principles of universal design embedded throughout the curriculum.
- This ensures that it is adaptable and flexible enough to exist in the Special School & Special Development School Golf programs.

Outcome

- 2,664 participants with a disability have been included through programs since 2016.
- In 2017, golf athletes from special schools have also competed in mainstream School Sports Australia Primary School events in 2017.

Reference

- <http://www.golf.org.au/pga-inclusive-coaching>



Key learnings

- Providing equal opportunities for golfers with a disability will drive inclusion initiatives and diversify program offers, opening up the sport to a broader range of participants.

3: Health Contribution

Soldier On Partnership

Soldier On works to support wounded veterans and their families through a range of rehabilitation and reintegration initiatives. The organisation has worked closely with a number of golf clubs and institutions to provide participation opportunities to veterans.

Background

- Golf Australia, ISPS Handa, and individual golf clubs have worked closely with Soldier On to provide several grassroots and high profile golf opportunities to veterans and their families.

Initiative

- On October 16, 2016, Greg Norman officially opened The Eastern Golf Club's new course in Yering, located within Melbourne's famous Yarra Valley. The day included a clinic with Soldier On where participants receiving personal tuition from Greg Norman himself.
- ISPS Handa also facilitated the opportunity for Soldier On to select and send a team to participate in the Invictus Games Golf Demonstration event in Florida, which was won by the Australian team.

Outcome

- Following the success at the Invictus Games, Soldier On selected a team of 10 golfing participants to compete for the Clyde Pearce Cup in Wales.
- ISPS Handa also provided opportunities for Soldier On golfers to participate in pro-ams and corporate golf events at both the Australian Open, and the Australian Ladies Open. Regular golf clinics for participants around the country are set to become a regular offering and were kick-started by a pilot program organised by Golf Australia and the PGA in Sydney.

Reference

- <https://www.soldieron.org.au/YearInReviewFY1516>



Key learnings

- This example is just one of many that highlights the contribution the golf industry makes towards charity and not-for-profit organisations.
- The work that many clubs do within the community is often under-reported, yet provides crucial funding and support to local businesses and not-for-profit organisations.



Main Report - 4: Education Contribution

4: Education Contribution

GOLF EDUCATION

- The MyGolf program provides school aged children with an opportunity to try golf that they otherwise may not have.
- Golf clubs are engaging more local schools to provide participation programs.
- Golf provides life long lessons about honesty, respect and self discipline.
- Some golf clubs are using the sport to engage with Indigenous and multi-cultural groups with the view of increasing participation.

MyGolf

MyGolf is Australia's national junior introductory program to develop and promote participation in golf. It is a 10 week introductory program to the sport, that is designed for 5 to 12 year old's and is the major driver of junior golf participation in Australia.

As a joint venture between Golf Australia and the PGA, MyGolf is also delivered within the ASC's Sporting Schools Program and is the major driver of junior golf participation in Australia.

The recommended model of MyGolf Sporting Schools is a four week school based program with an optional fifth week at the local golf club/facility.



4: Education Contribution

EDUCATION PROGRAMS

The table below demonstrates the number of MyGolf Sporting Schools programs that have been requested and delivered since the programs inception in 2015, as well as the total number of participants that have been through the program.

MyGolf Sporting Schools Programs					
Year	Term	Requested	Delivered	Participants	Delivery Rate %
2015	3	122	109	2,740	89%
	4	156	155	4,260	99%
2016	1	145	82	4,609	56%
	2	175	129	3,565	73%
	3	161	119	4,425	73%
	4	156	109	3,403	70%
2017	1	160	120	3,500	75%
	2	130	103	2,496	79%
Total		1,205	926	28,998	77%

Price Breakdown			
Equipment Kit	\$600	\$600 x 926	\$555,600
Cost / session	\$80		
No. of sessions included	4	(\$80 x 4) x 926	\$296,320
Total			\$851,920

4: Education Contribution

Yalata Anangu School

The Aboriginal community of Yalata is situated 250km from the closest main town, and 986km away from the nearest capital city, Adelaide. However, the Yalata Anangu School is now home to a new golf course.

Background

Teacher and MyGolf school ambassador, Greg Seiffert had the vision of developing a course at the school after taking his students to a nearby oval and introducing them to golf. The aim was to give his students a chance to learn a sport that is healthy and positive.

Initiative

- Greg saw the student's interest and enthusiasm to play golf after he taught them some skills on the school oval.
- It sparked the idea of putting a few holes around the oval to give them a challenge.
- The course design was incorporated as a project for the senior students.
- All of the four classes at the school assisted in building the course.

Outcome

- A four-hole course using gypsum for the putting greens, tin cans for the holes and pins made from pieces of bamboo.
- Two par-four holes that are approximately 145m.
- Two par-three holes that are approximately 90m.

What's Next?

- Future plans to create a mini golf course at the school.

Reference

- <http://www.golf.org.au/newsdisplay/96860>



Key learnings

- Golf provides educational benefits to disadvantaged communities by engaging students in practical and 'hands on' learning.
- Programs such as this impact both the school environment and broader community by building social interaction and a deeper engagement with the natural environment.



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Note – The estimates presented in this report have been entirely derived from the sources identified and, therefore, their accuracy is dependent on the extent to which these sources are truly representative of golf activities throughout Australia. The Australian Golf Industry Council, Golf Australia and affiliated organisations, Sport Business Partners, and Street Ryan and Associates Pty. Ltd., accept no responsibility for the accuracy of information or estimates presented, or for decisions taken as a result of material in this report.



About the Authors

ABOUT THE AUTHORS



SBP provides advice and insights to the not-for-profit and commercial business sectors through a range of integrated strategic, commercial and market research services.

The firm was established in 2001 as a specialist strategic consultancy for the sport business sector, and for the last 15 years we have been a trusted adviser to more than 75 leading professional and Olympic sports, government agencies and commercial businesses across Australia, New Zealand and internationally.

The core services offered by SBP are based around strategic reviews and planning, market research and insights, commercial and business model advisory and business problem solving.

Illustrating the breadth of sporting experience within SBP, the organisations that SBP have worked with include Football Federation Australia, Athletics Australia, Australian Rugby Union, Cricket Australia, Gymnastics Australia, Baseball Australia, Golf Australia and the Australian Sports Commission.



and remote areas of every Australian state and territory. Initially a function of the focus on regional development, quantitative analysis and impact assessment have become core Street Ryan consulting areas in their own right.

Street Ryan has considerable experience and practical knowledge in sports assessment, participation censuses, economic and demographic analysis and projections. Our senior staff have been working in these areas for more than three decades.

Street Ryan have a long history in supporting national sporting organisation clients, including long-term relationships with the Australian Football League (AFL), Cricket Australia, Bowls Australia, and the Australian Rugby Union, as well as a range of shorter term assignments with Golf Australia, Softball Australia, New Zealand Cricket, Tennis Australia and Hockey Australia.

Beyond sporting organisations, Street Ryan specialises in regional development assignments around Australia for private and public organisations, often encompassing economic contribution and impact assessment and demographic analysis for capital development and investment projects, major events, tourism and industry sectors.

Street Ryan has been established since 1981 and works on regional development assignments in metropolitan, provincial, rural

Community Impact Study

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