

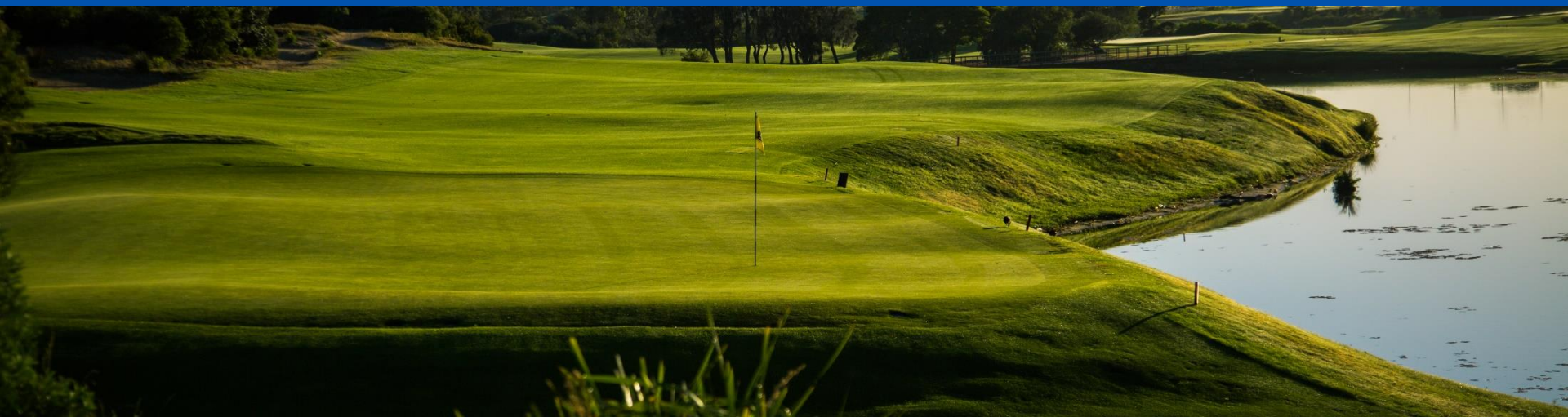


Golf Australia

Competition Rounds Report January to December 2018

Prepared for Australian Golf Industry Council

Source: GolfLINK



Key Highlights

- 2018 was a consistent year for competition rounds across Australia.
- 10.43 million rounds were played – an increase of 1.8% on last year.
- 328,516 golfers recorded rounds – a decline of 0.65% from 2017.
- 82% of rounds were played by males and 18% by females.
- Female rounds increased by 1.9% and male rounds by 1.7%.
- Metropolitan and regional rounds increased by 1.8% each.
- 34% of all rounds were played on Saturday – 91.4% by males.
- 20.8% of rounds are played by golfers with a 10 handicap or lower.
- 63% of rounds are played by golfers aged 60 and above and only 8% by golfers 34 and below.
- Nine hole rounds increased by 14.7% but make up only 3.7% of all rounds played.

Competition Rounds 2013 to 2018

Competition rounds	2013	2014	2015	2016	2017	2018	Change over 6 years
NSW	3,938,658	4,011,968	3,887,027	3,929,826	3,928,226	4,031,563	2%
VIC	2,482,962	2,541,360	2,584,929	2,547,056	2,570,653	2,623,354	6%
QLD	1,652,636	1,804,222	1,768,392	1,847,292	1,789,166	1,809,132	9%
WA	887,826	924,002	952,189	948,142	952,614	958,507	8%
SA	724,321	738,906	750,722	738,436	746,008	745,859	3%
TAS	261,818	274,471	278,069	260,862	274,401	271,791	4%
NT	44,939	44,773	42,570	42,438	40,054	43,284	-4%
Total	9,993,160	10,339,702	10,263,898	10,314,052	10,321,643	10,483,490	5%

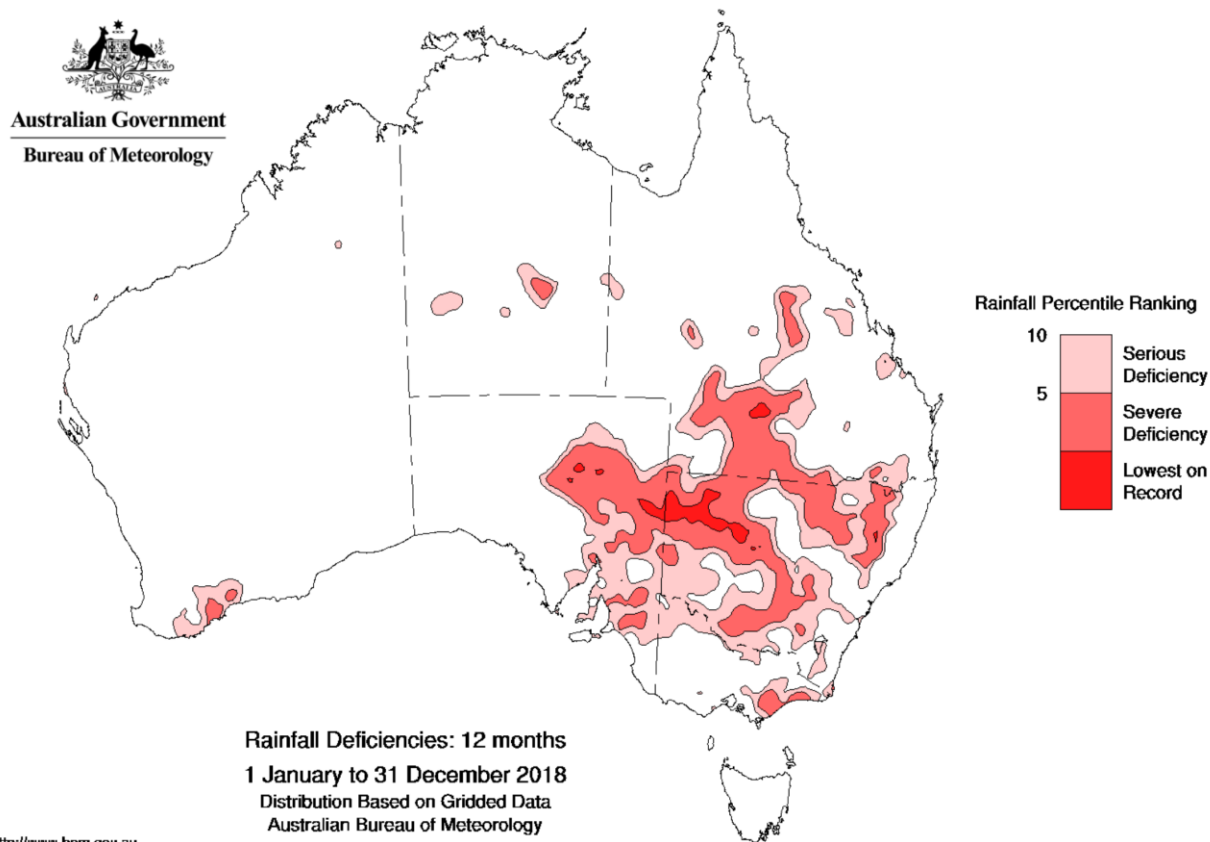
- Rounds increased over six years by 5%.
- The rate of growth has been highest in QLD at 9% and WA 8%.
- The only decline occurred in the NT (-4%)

Competition Rounds by State January to December 2018 v 2017

State	# of Rounds 2018	# of Rounds 2017	Variance 2018-2017	%
NSW	4,031,563	3,928,226	103,337	2.6%
QLD	1,809,132	1,789,166	19,966	1.1%
VIC	2,623,354	2,570,653	52,701	2.1%
SA	745,859	746,008	-149	0.0%
WA	958,507	952,614	5,893	0.6%
TAS	271,791	274,401	-2,610	-1.0%
NT	43,284	40,054	3,230	8.1%
Totals	10,483,490	10,301,124	182,366	1.8%

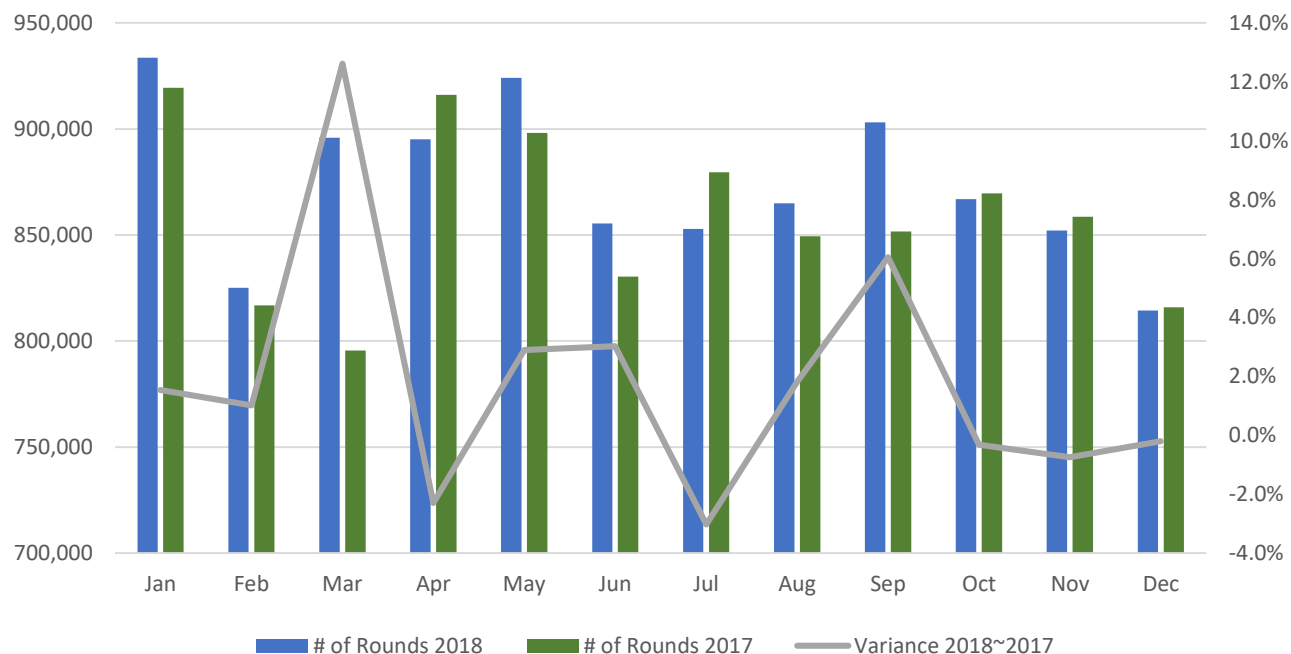
- 10,483,490 rounds were played in 2018 – an increase of 182,366 or 1.8% on 2017.
- The national figure was influenced mostly by increases of 103,337 in NSW, 52,701 in VIC and 19,966 in QLD.

Rounds increased despite rainfall deficiencies



- Despite significant drought in 2018, regional NSW recorded 2,417,075 rounds – an increase of 3%.

Competition Rounds January to December 2018 v 2017



- 2018's increase of 182,366 rounds – 151,800 came in March and September.
- March rounds were unusually low in 2017 due to weather events in NSW.
- The increase in September 2018 was influenced by a 20% increase in rounds in Victoria.
- Except for March and September, rounds in each month of 2018 were consistent and within 3% of 2017 levels.

Competition rounds by Location January to December 2018 v 2017

Location Type	# of Rounds 2018	# of Rounds 2017	Variance 2018- 2017
Metro	4,290,329	4,216,462	1.8%
Regional	6,193,161	6,084,660	1.8%

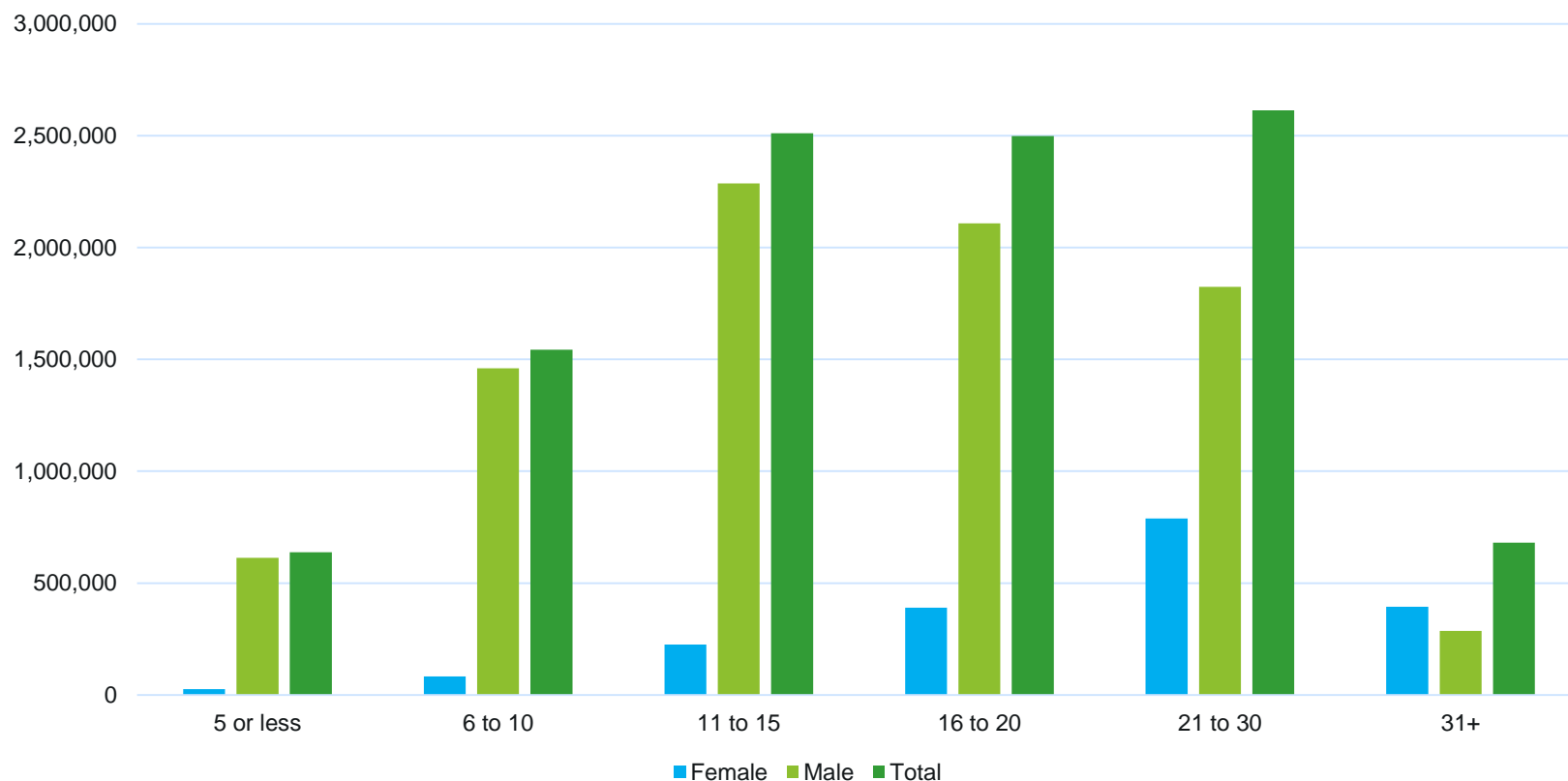
- A 1.8% increase was experienced in both metropolitan and regional areas.

Competition Rounds by Gender January to December 2018 v 2017

Gender	# of Rounds 2018	# of Rounds 2017	Variance 2018~2017
Female	1,906,038	1,870,188	1.9%
Male	8,577,452	8,430,936	1.7%

- Female rounds increased by 1.9% and male rounds increased by 1.7%.

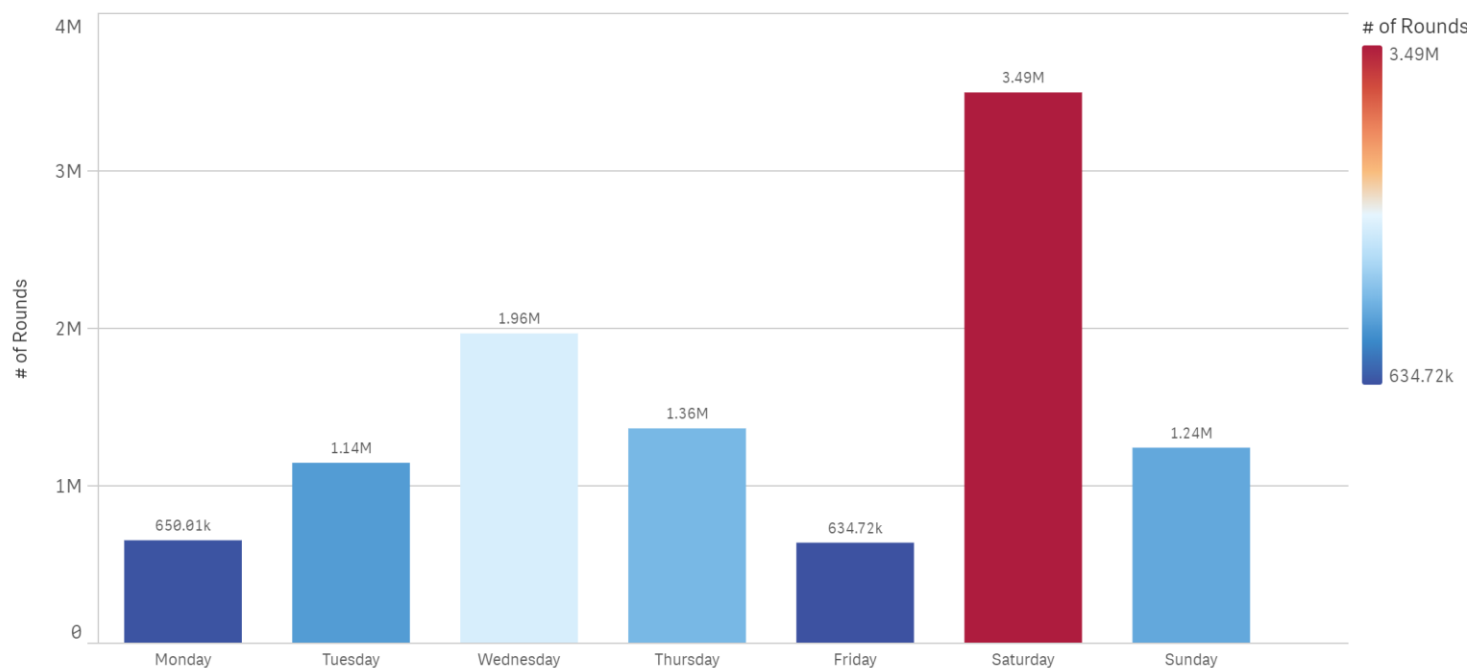
Rounds by Handicap 2018



- The vast majority of competition golf is played by mid to high handicap players.
- 83% of female rounds were played in the range of 16 and above handicaps.
- 73% of male rounds were played in the range of 11 to 30 handicaps.
- Only 24.2% of male rounds were played in the 10 or lower handicap range.
- Only 5.7% of female rounds were played in the 10 or lower handicap range.

Competition Rounds by Day of Week January to December 2018 v 2017

of Rounds by Weekday



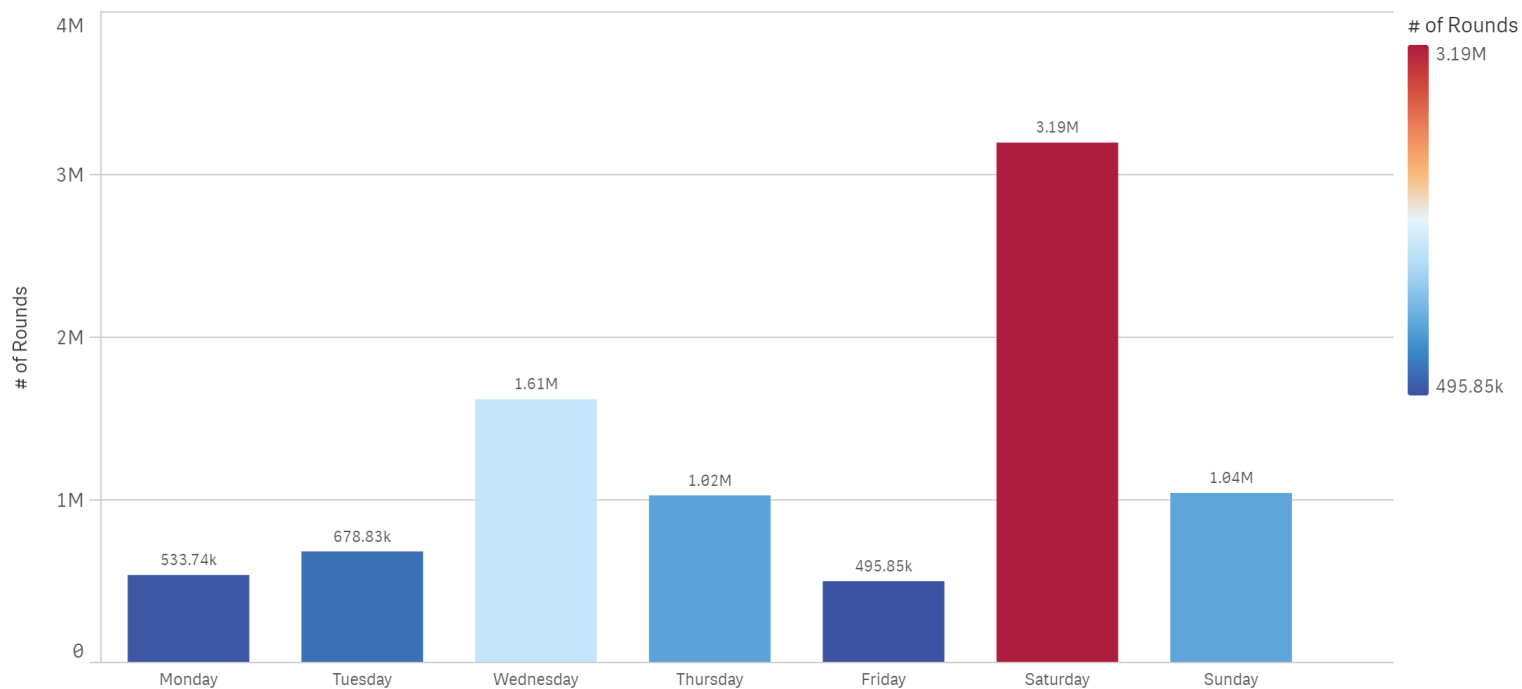
- At 3.49 million rounds, Saturday was by far the most popular day for competition golf.
- Monday and Friday were the quietest days.

Competition Rounds by Day of Week - Male

January to December

2018 v 2017

of Rounds by Weekday



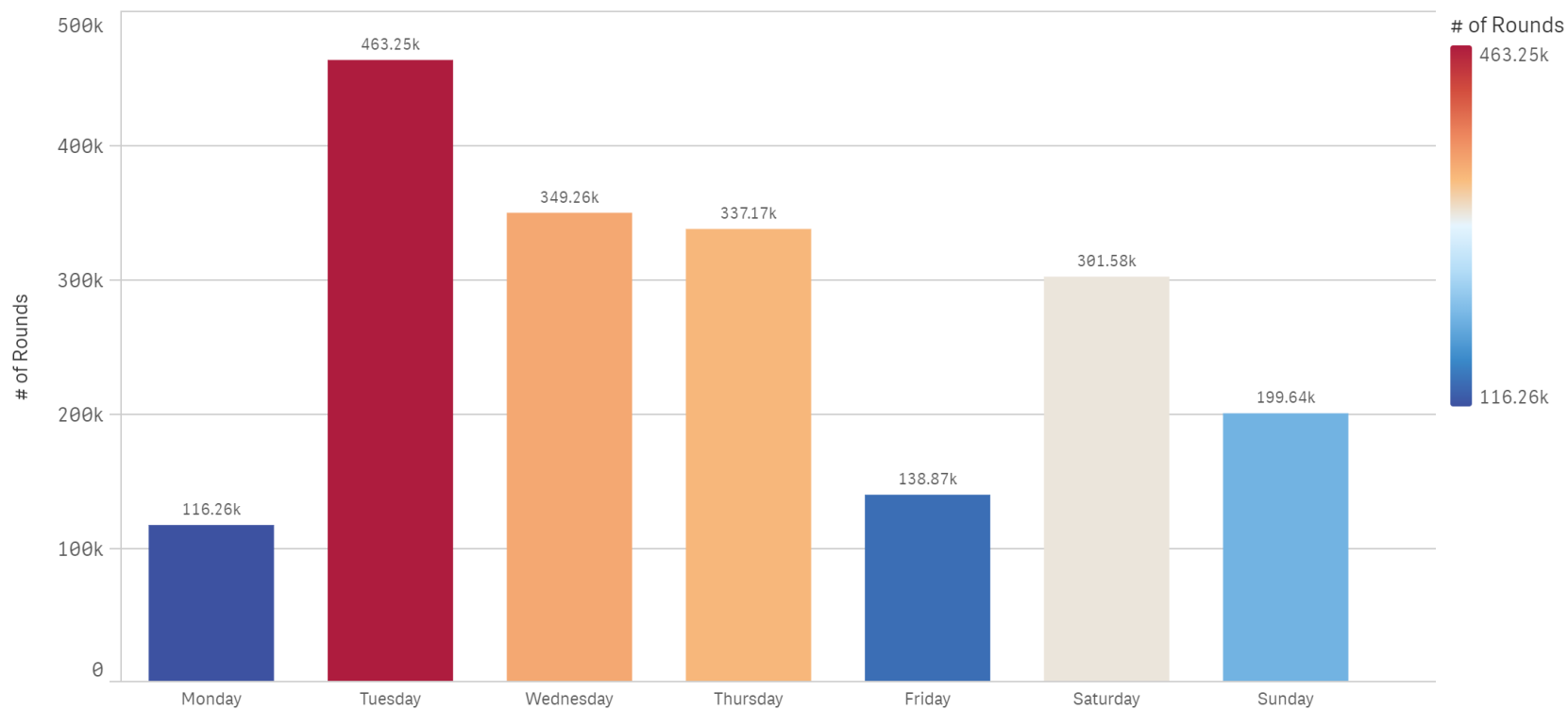
- Saturday was the most popular day for males with 3.19 million rounds.
- Monday, Tuesday and Friday were the quietest days.

Competition Rounds by Day by Day of Week - Female

January to December

2018 v 2017

of Rounds by Weekday



- Golf rounds are more evenly spread across the week for females.
- Tuesday was the most popular day for females.
- Monday and Friday were the quietest days.
- More rounds were played on a Saturday than Sunday.

Competition Rounds by Age Group January to December 2018

Age Range	Male	Female	% of Rounds		Adjusted % of known ages
5-9yrs	0.4%	0.5%	0.4%	}	1.9%
10-14yrs	0.5%	0.6%	0.5%		
15-19yrs	1.1%	0.8%	1.0%		
20-24yrs	1.0%	0.2%	0.8%	}	4.8%
25-29yrs	2.1%	0.9%	1.9%		
30-34yrs	2.4%	0.3%	2.0%	}	24.2%
35-39yrs	2.6%	0.5%	2.2%		
40-44yrs	3.2%	0.8%	2.8%		
45-49yrs	5.0%	2.2%	4.5%		
50-54yrs	5.9%	4.7%	5.7%		
55-59yrs	8.9%	9.2%	8.9%	}	52.4%
60-64yrs	10.9%	13.6%	11.4%		
65-69yrs	14.0%	17.8%	14.7%		
70-74yrs	13.6%	16.4%	14.1%		
75-79yrs	7.4%	8.7%	7.7%	}	63.0%
80-84yrs	3.3%	3.6%	3.4%		
84yrs+	1.3%	1.2%	1.3%		
Unknown	16.4%	18.0%	16.7%	16.7%	
	100.0%	100.0%	100.0%	100.0%	100%

- 63% of rounds are played by golfers aged 60 and over.
- Only 8% of rounds were played by golfers 34 and younger.
- **Note:** 16.7% of ages are unknown and therefore known ages have been adjusted.

Nine hole competition rounds by State January to December 2018 v 2017

	# of 9 hole Rounds 2018	# of 9 hole Rounds 2017	Variance # 2018~2017	Variance % 2018~2017	# All Rounds	% of 9 hole to # All rounds
QLD	36,435	29,217	7,218	24.7%	1,809,132	2.0%
WA	79,929	72,969	6,960	9.5%	958,507	8.3%
VIC	88,432	76,287	12,145	15.9%	2,623,354	3.4%
NSW	119,884	99,802	20,082	20.1%	4,031,563	3.0%
SA	34,358	35,010	-652	-1.9%	745,859	4.6%
TAS	27,138	24,737	2,401	9.7%	271,791	10.0%
NT	1,910	419	1,491	355.8%	43,284	4.4%
Totals	388,086	338,441	49,645	14.7%	10,483,490	3.7%

- Nine hole rounds increased by 49,645 nationally – an increase of 14.7%.
- Whilst nine hole rounds make up only 3.7% of all rounds played nationally it is considerably higher in Tasmania (10%) and WA (8.3%).

Nine hole competition rounds by Location January to December 2018 v 2017

Location Type	# of 9 hole Rounds 2018	# of 9 hole Rounds 2017	Variance 2018~2017
Metro	132,156	116,008	13.9%
Regional	255,930	222,433	15.1%
Totals	388,086	338,441	14.7%

- The 14.7% increase in nine hole rounds was influenced by increases in both regional and metropolitan areas.

Nine hole competition rounds by Gender January to December 2018 v 2017

Gender	# of 9 hole		
	# of 9 hole Rounds 2018	Rounds 2017	Variance 2018~2017
Female	182,966	162,825	12.4%
Male	205,120	175,616	16.8%
	388,086	338,441	14.7%

- The 14.7% increase in nine hole rounds was influenced by increases in both males and females.

Paul Vardy

Clubs & Facilities Support Senior Manager

paulv@golf.org.au

(03) 9626 5012

0407 867 684

Level 2, 111 Coventry Street, South Melbourne Victoria 3205 Australia
T. 03 9626 5000 F. 03 9626 5095 www.golf.org.au
Reg No. A0048256Z ARBN 118 151 894 ABN 54 118 151 894



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