

SPORTAUS

AUSPLAY



Golf

State of Play Report

Driving Participation & Engagement

April 2019





About this Report

The State of Play Report has been designed to deliver a single sport snapshot, to help identify trends and opportunities to maximise participation and engagement.

AusPlay Data

The nationwide AusPlay survey has been running since October 2015, using Computer Assisted Telephone Interviewing (CATI).

The core aim of AusPlay data is to provide accurate and reliable information on trends in participation and physical activities among Australian residents, including Children Aged Under 15 and Adults 15+.

Annually, a total of about 20,000 interviews are conducted with Adults Aged 15+ and about 3,500 interviews with parents/guardians of Children Under 15.

AusPlay is carried out in compliance with ISO 20252 and membership requirements for the Association of Market and Social Research Organisations (AMSRO) and the Australian Market and Social Research Society (AMSRS).

Data within this report

This report contains data collected from January 2016 to December 2018.

Data within this report has been prepared by Sport Australia and may vary from other published AusPlay data due to differences in definitions and/or data classifications.

Golf: State of Play Report

Key Take Outs



Overall Participation

The annual population estimate for Adults 15+ participating in Golf was 986,479 (or 4.9% of the Adult 15+ population).

Adult participation was heavily skewed towards males (797,943 or 8.0% of the male population), with males accounting for 81% of participation.

A very high proportion of Adult 15+ Golf participation was organised (86%), with the majority of organised participation (81%) in sport clubs.

Golf is a rare sport/physical activity where participation rates increase with age, with peak participation occurring at 65+ years of age. More than half of all Adult 15+ Golf participants were aged 55 and over (59%).

Participation rates were low among LOTE (speak a language other than English at home, a growing segment of the Australian population) and Indigenous.

The number of Children's organised out-of-school participants in Golf was small (less than 40,000) and as a result there was not enough sample for meaningful analysis.

Frequency & Duration

Adults 15+ who participated in Golf had a median frequency of 40 sessions per annum (less than once per week) and the median session duration was 240 minutes. Only 21% of all Golf sessions lasted less than 180 minutes.

Sport Most Strongly Associated With (loyalty)

When compared to participation numbers for Golf, relatively few Adults 15+ (450,359 or 2.2% of the Adult 15+ population) considered Golf the sport they most strongly associate with. This may be a reflection of most Australians

playing in older age without having built a connection with the sport as children or young adults.

Spend

A total of \$985+ million per annum was spent on Adult 15+ Golf participation. Median annual spend was \$730 per Adult participant. This is somewhat higher than the median for all sports/physical activities, meaning that 11.5% of all sport/physical activity participation fees was spent on Golf. The share of spend on Golf is even higher (30.1%) for spending on club sport only.

Motivations for Participation (Adults 15+)

The dominant motivation to participate in Golf was 'Fun/enjoyment' (58%). 'Social reasons' were also a motivator (46%), as was 'Physical health/fitness' (33%).

Reasons For Dropping Out of Participation

The dominant reason for dropping out of Golf participation was 'Poor health or injury' (33%) which makes sense considering that most players were 55 years of age or older. 19% said they 'Didn't have enough time' or had 'Too many other commitments'.

Growth & Opportunities

In spite of an overall downward trend in Golf participation over the last three years, net growth market opportunity is fairly healthy as there are many Adults, especially older males (mirroring current participation), considering taking up Golf. One reason that interest may be limited to older age groups is Golf's typically longer duration.

Golf (Adults 15+)

Snapshot



AusPlay data, Adult and Golf Participant Population 15+: January 2016 to December 2018
 Adult 15+ n=61,579; Golf Participants 15+ n=3,379



Information on this page provides a snapshot of the Adult 15+ population, at total national level and by gender.

Participation figures are shown as total volume among the Adult 15+ population and the % who have participated.

This provides a read on participation levels, along with the market size when it comes to sports wear and apparel.

Engagement & Participation	Total	Male	Female
Is Most Strongly Associated Sport (%)	2.2%	3.3%	1.2%
Is Most Strongly Associated Sport (People)	450,359	327,019	123,340
Participation (%)	4.9%	8.0%	1.9%
Participation (People)	986,479	797,943	188,535
Average Frequency Per Annum	52	50	63

Conversion to Organised & Club	Total	Male	Female
Participation (People)	986,479	797,943	188,535
Organised Participation (People)	852,991	683,707	169,284
Conversion to organised (%)	86%	86%	90%
Club Participation (People)	691,033	551,409	139,624
Conversion to club – from Overall Participation (%)	70%	69%	74%
Conversion to club – from Organised Participation (%)	81%	81%	82%



Golf (Adults 15+)

Snapshot by State



AusPlay data, Adult and Golf Participant Population 15+: January 2016 to December 2018
 Adult 15+ n=61,579; Golf Participants 15+ n=3,379



Information on this page provides a snapshot of the Adult 15+ population, at total national level and by state.

Participation figures are shown as total volume among the Adult 15+ population in each state and the % who have participated.

This provides a snapshot to help identify state level strengths and weaknesses.

Engagement & Participation	Total	NSW	VIC	QLD	SA
Is Most Strongly Associated Sport (%)	2.2%	2.4%	2.3%	2.3%	1.8%
Is Most Strongly Associated Sport (People)	450,359	154,204	114,253	91,730	25,228
Participation (%)	4.9%	5.3%	5.4%	4.2%	4.3%
Participation (People)	986,479	333,195	273,301	169,540	61,032
Average Frequency Per Annum	52	51	54	51	49

Conversion to Organised & Club	Total	NSW	VIC	QLD	SA
Participation (People)	986,479	333,195	273,301	169,540	61,032
Organised Participation (People)	852,991	298,841	238,403	144,281	49,919
Conversion to organised (%)	86.5%	89.7%	87.2%	85.1%	81.8%
Club Participation (People)	691,033	239,466	196,748	120,872	40,183
Conversion to club – from Overall Participation (%)	70.1%	71.9%	72.0%	71.3%	65.8%
Conversion to club – from Organised Participation (%)	81.0%	80.1%	82.5%	83.8%	80.5%

Golf (Adults 15+)

Snapshot by State



AusPlay data, Adult and Golf Participant Population 15+: January 2016 to December 2018
 Adult 15+ n=61,579; Golf Participants 15+ n=3,379



Information on this page provides a snapshot of the Adult 15+ population, at total national level and by state.

Participation figures are shown as total volume among the Adult 15+ population in each state and the % who have participated.

This provides a snapshot to help identify state level strengths and weaknesses.

Engagement & Participation	Total	WA	ACT	NT	TAS
Is Most Strongly Associated Sport (%)	2.2%	2.2%	2.1%	0.9%	1.4%
Is Most Strongly Associated Sport (People)	450,359	50,104	7,037	1,820	5,984
Participation (%)	4.9%	4.6%	4.7%	3.9%	4.8%
Participation (People)	986,479	105,223	15,764	7,717	20,706
Average Frequency Per Annum	52	57	55	26	53

Conversion to Organised & Club	Total	WA	ACT	NT	TAS
Participation (People)	986,479	105,223	15,764	7,717	20,706
Organised Participation (People)	852,991	81,889	13,407	7,062	19,189
Conversion to organised (%)	86.5%	77.8%	85.0%	91.5%	92.7%
Club Participation (People)	691,033	63,954	10,868	2,839	16,104
Conversion to club – from Overall Participation (%)	70.1%	60.8%	68.9%	36.8%	77.8%
Conversion to club – from Organised Participation (%)	81.0%	78.1%	81.1%	40.2%	83.9%

Golf (Adults 15+)

Trends

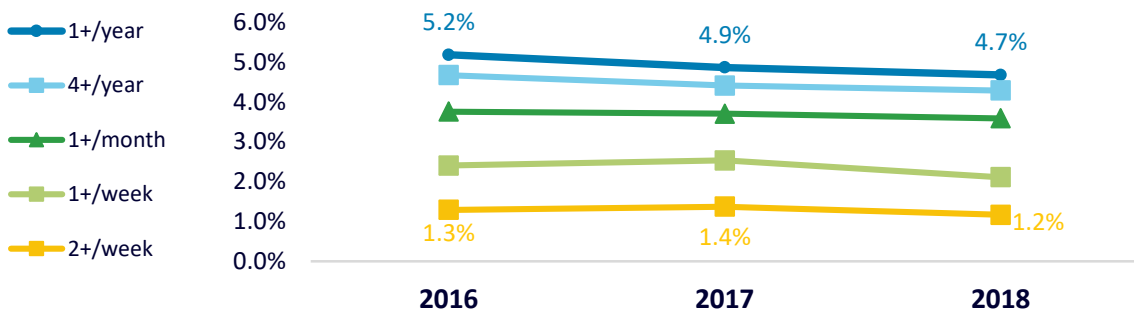


Information on this page provides overall participation and organised participation trends among the Adult 15+ population.

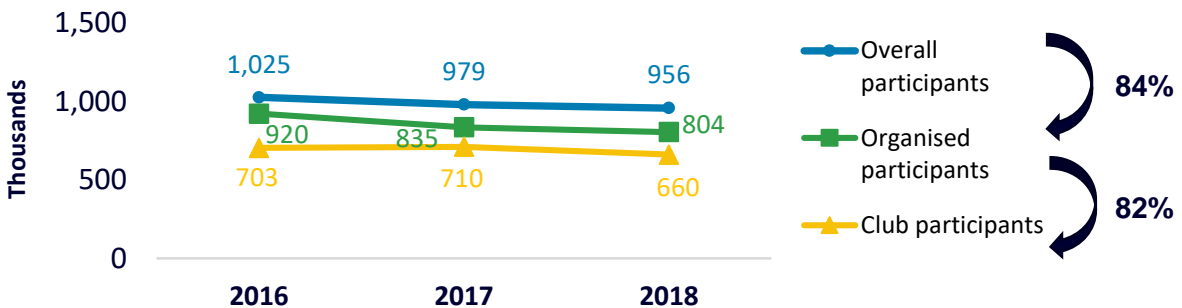
As more data becomes available in subsequent report releases, time series data will be expanded.

This provides a read on participation trends to identify if a sport is gaining or contracting when it comes to participation metrics.

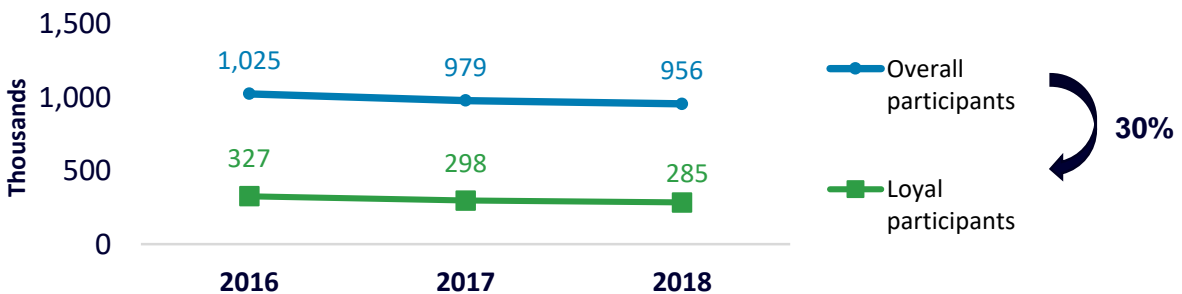
Participation Trends



Conversion to Organised - Evolution



Loyalty among Participants - Trend



Golf Participation by Life Stage



AusPlay data, Adult and Golf Participant Population 15+: January 2016 to December 2018
 Adult 15+ n=61,579; Golf Participants 15+ n=3,379

AusPlay data, Children and Golf Participant Population 0-14: January 2016 to December 2018
 Children 0-14 n=10,285; Golf Participants 0-14 n=74

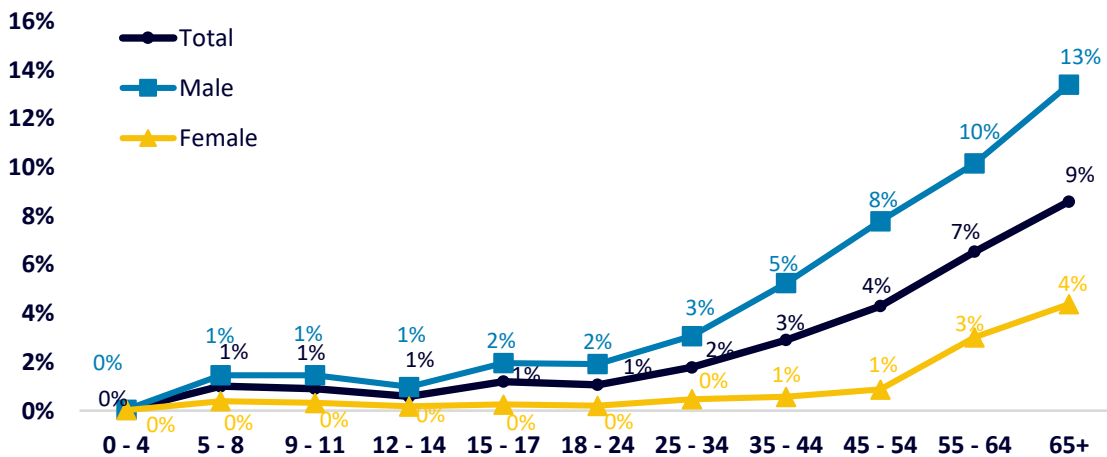


Information on this page provides a snapshot of participation at national level, by age and by gender.

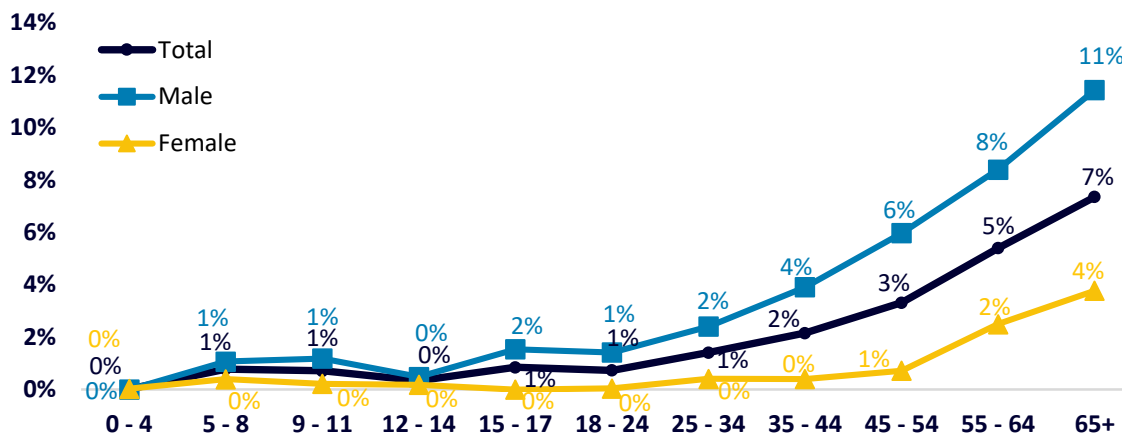
Figures are shown as the % of each age who have participated.

This provides a read of peak participation rates by age, to help identify opportunities to develop targeted initiatives aimed at boosting participation among specific age and gender groups.

Participation by Life Stage - Organised



Participation by Life Stage - Club



Golf

State of Play Report

Adults 15+



Golf (Adults 15+)

Participation Levels



AusPlay data, Adult and Golf Participant Population 15+: January 2016 to December 2018
 Adult 15+ n=61,579; Golf Participants 15+ n=3,379

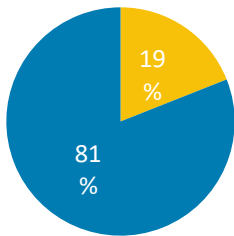


Information on this page provides a snapshot of the Adult 15+ population, at total national level and by gender.

Gender split shows the contribution each gender makes when it comes to total participation. Participation levels are shown as total volume among the Adult 15+ population and the % who have participated.

This provides a snapshot to help identify the age and gender groups that are driving current participation volume, whilst also helping to identify potential growth opportunities.

Gender Split

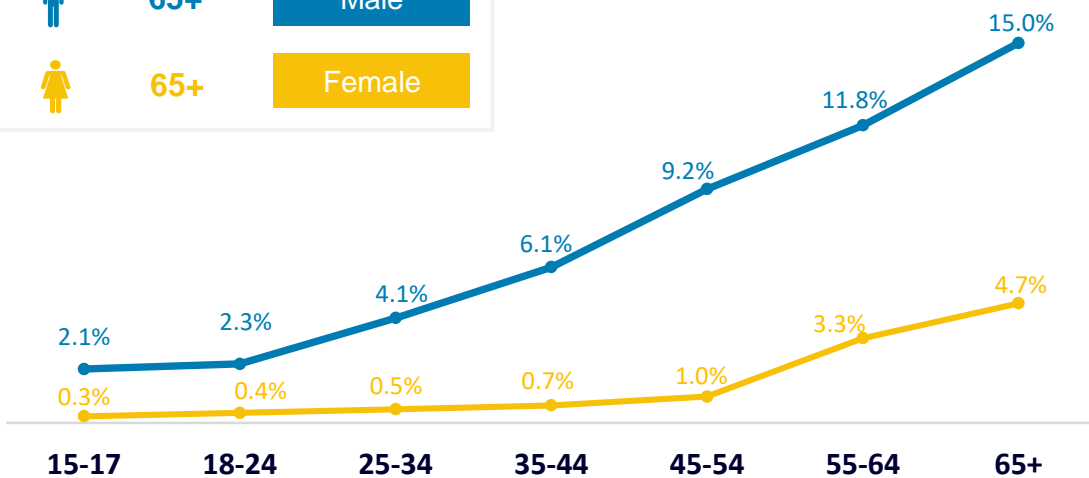


Participation Levels

	Total Participation	Male Participation	Female Participation
%	4.9%	8.0%	1.9%
000's	986.5	797.9	188.5

Participation Levels by Age and Gender

Peak Participation by Age



Golf (Adults 15+)

Participation by Location



AusPlay data, Adult Population 15+: January 2016 to December 2018 Adult 15+ n=61,579

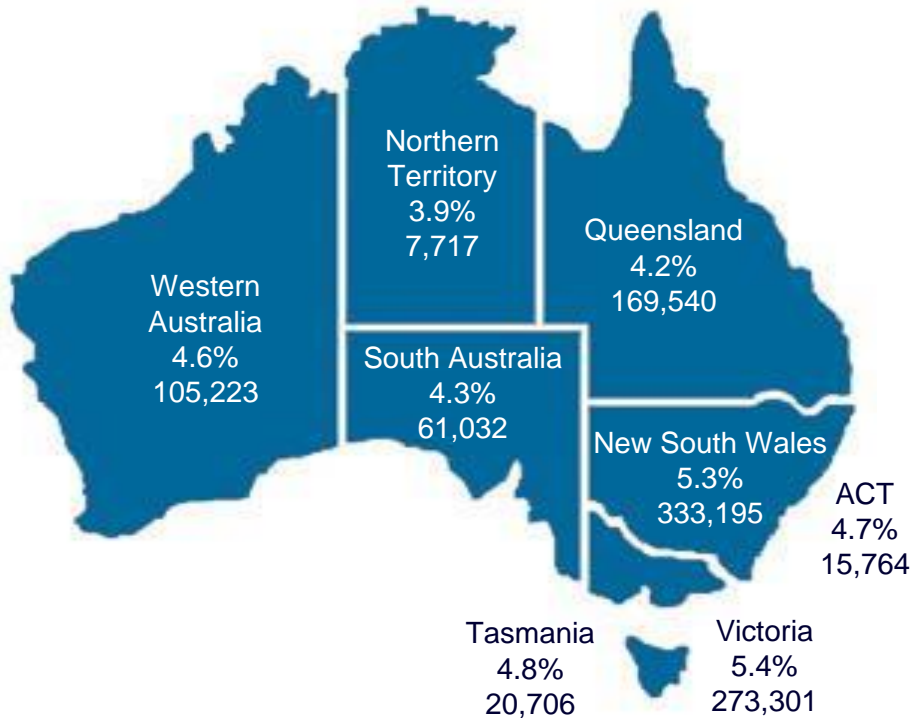


Information on this page provides a snapshot of the Adult 15+ population, based on state and geography.

Participation levels are shown as total volume among the Adult 15+ population and the % who have participated.

This provides a snapshot to help identify state level participation, as well as differences across metro, regional and remote areas.

Participation Levels by State



	Total National Participation	Major Cities	Inner & Outer Regional	Remote & Very Remote
%	4.9%	4.8%	5.5%	3.6%
000's	986.5	675.0	279.6	11.0

Golf (Adults 15+)

Player Profile



AusPlay data, Adult and Golf Participant Population 15+: January 2016 to December 2018
 Adult 15+ n=61,579; Golf Participants 15+ n=3,379



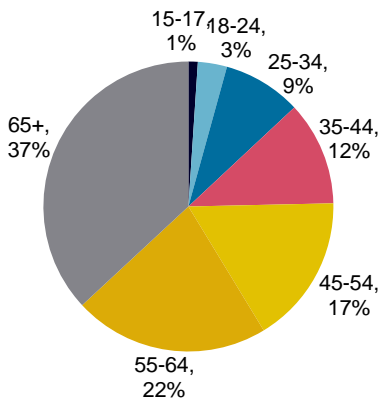
Information on this page provides a snapshot of the Adult 15+ population, based on age and gender, as well as LOTE, People with Disability and Indigenous.

Share of Play by Gender and Age shows the contribution of each group when it comes to overall participation.

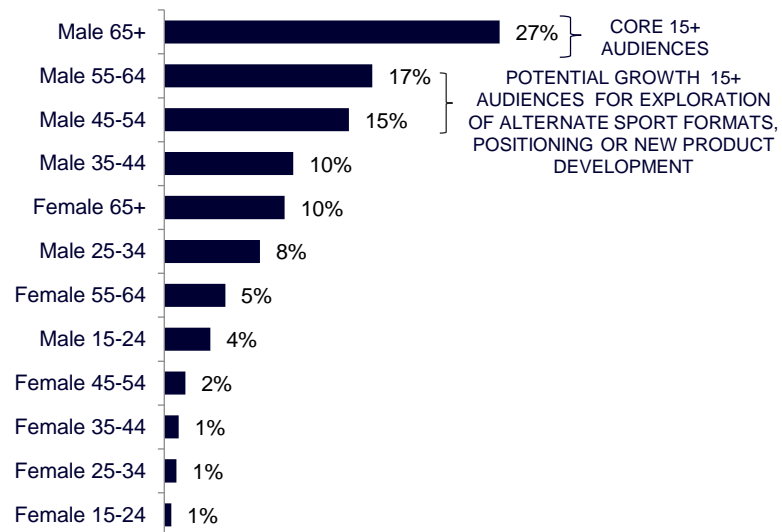
This helps identify the specific age and gender groups that are having the greatest impact on overall participation levels, whilst also highlighting growth opportunities when it comes to sport formats that extend beyond traditional demographic audience needs.

Player Profile by Gender and Age

Age Split



Share of Play by Gender & Age



Participation Levels by Population Group

	Total National Participation	LOTE (Speak language other than English at home)	People with Disability	Indigenous
%	4.9%	1.9%	3.8%	2.7%
000's	986.5	64.4	116.8	11.5

Golf (Adults 15+)

Frequency & Duration



AusPlay data, Adult and Golf Participant Population 15+: January 2016 to December 2018
 Adult 15+ n=61,579; Golf Participants 15+ n=3,379

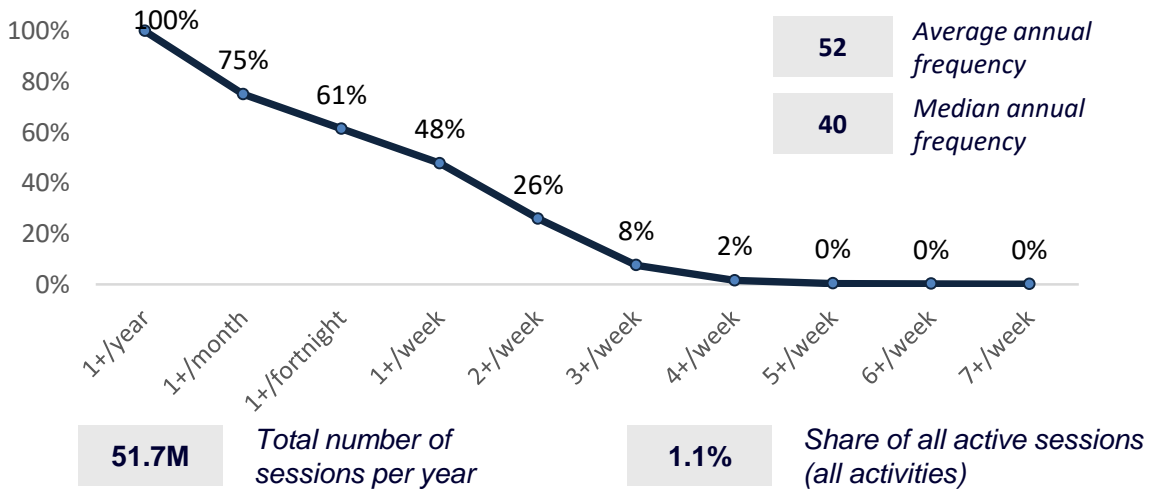


Information on this page provides a snapshot of the Adult 15+ Participant Population, in terms of frequency and duration of participation.

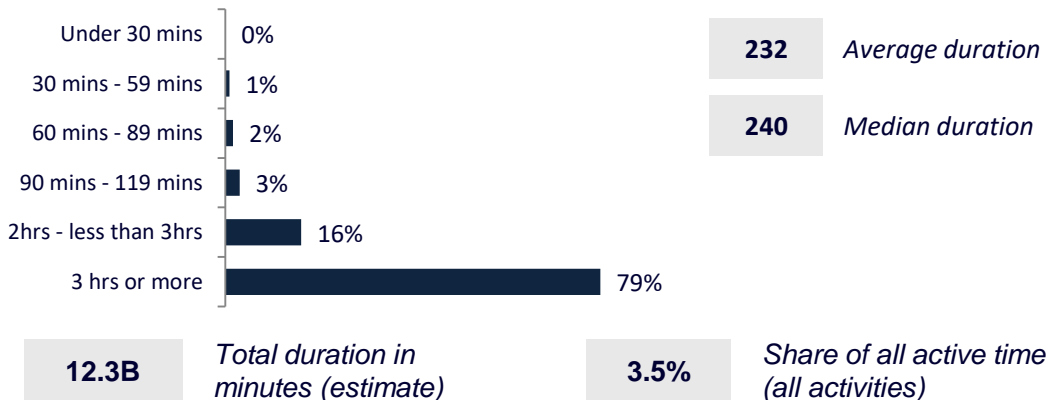
Frequency of participation provides a read on how often participation occurs. Duration provides a read of how long is spent each time participation takes place.

This helps identify opportunities among the Participant Population, in terms of initiatives aimed at boosting the total number of sessions per year by increasing frequency of participation.

Participation Levels by Age and Gender



Participation Levels by Age and Gender



Golf (Adults 15+) Participation



AusPlay data, Adult and Golf Participant Population 15+: January 2016 to December 2018
Adult 15+ n=61,579; Golf Participants 15+ n=3,379

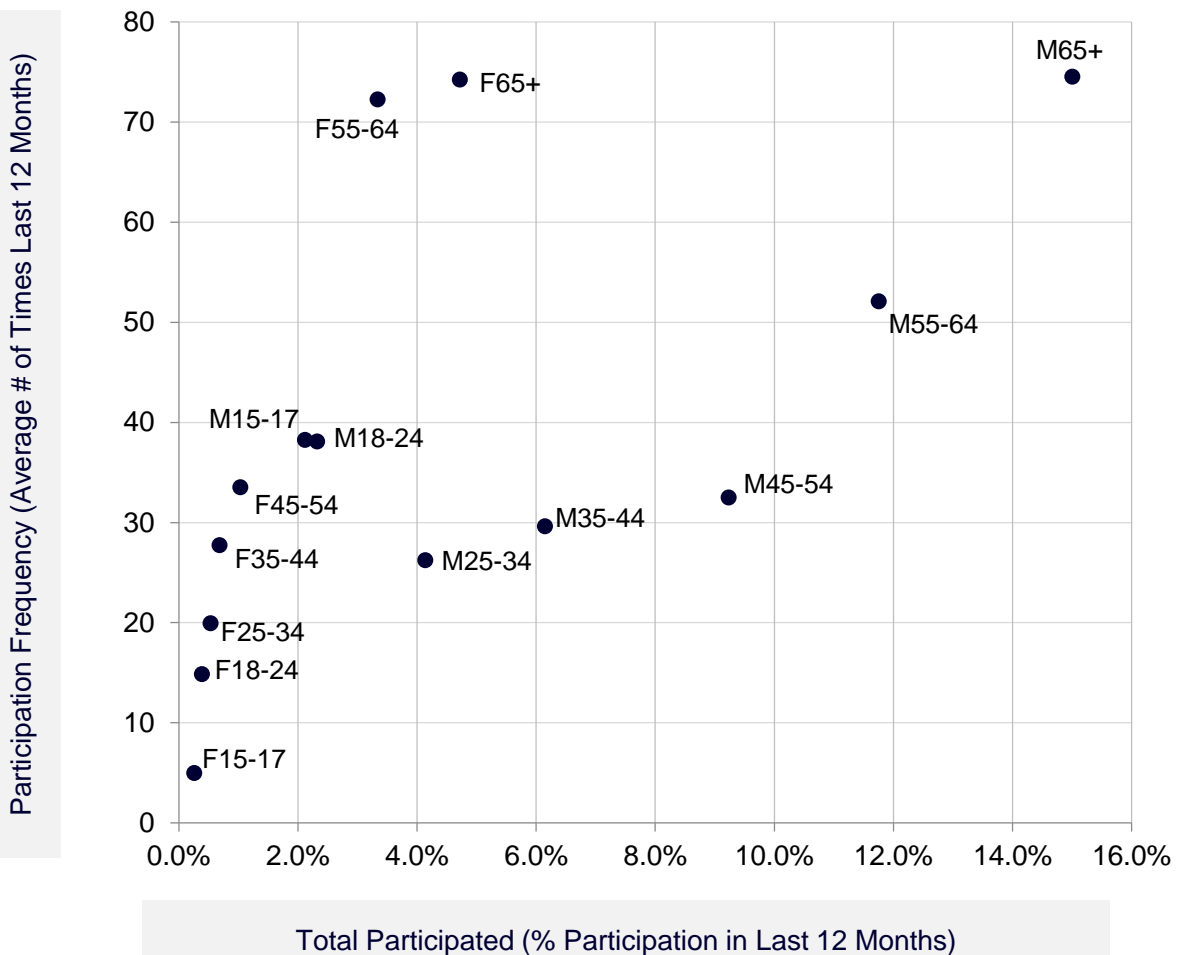


Information on this page provides a snapshot of the Adult 15+ Population in terms of participation and number of times participated in the last 12 months.

Figures are shown by age and gender groups, with those in the top right section being the most active on both measures.

This illustrates the participation profile across different age and gender groups, to identify key opportunities at age and gender level.

Participation & Frequency by Age



Golf (Adults 15+)

Current Market Position



AusPlay data, Adult Population 15+: January 2016 to December 2018 Adult 15+ n=61,579

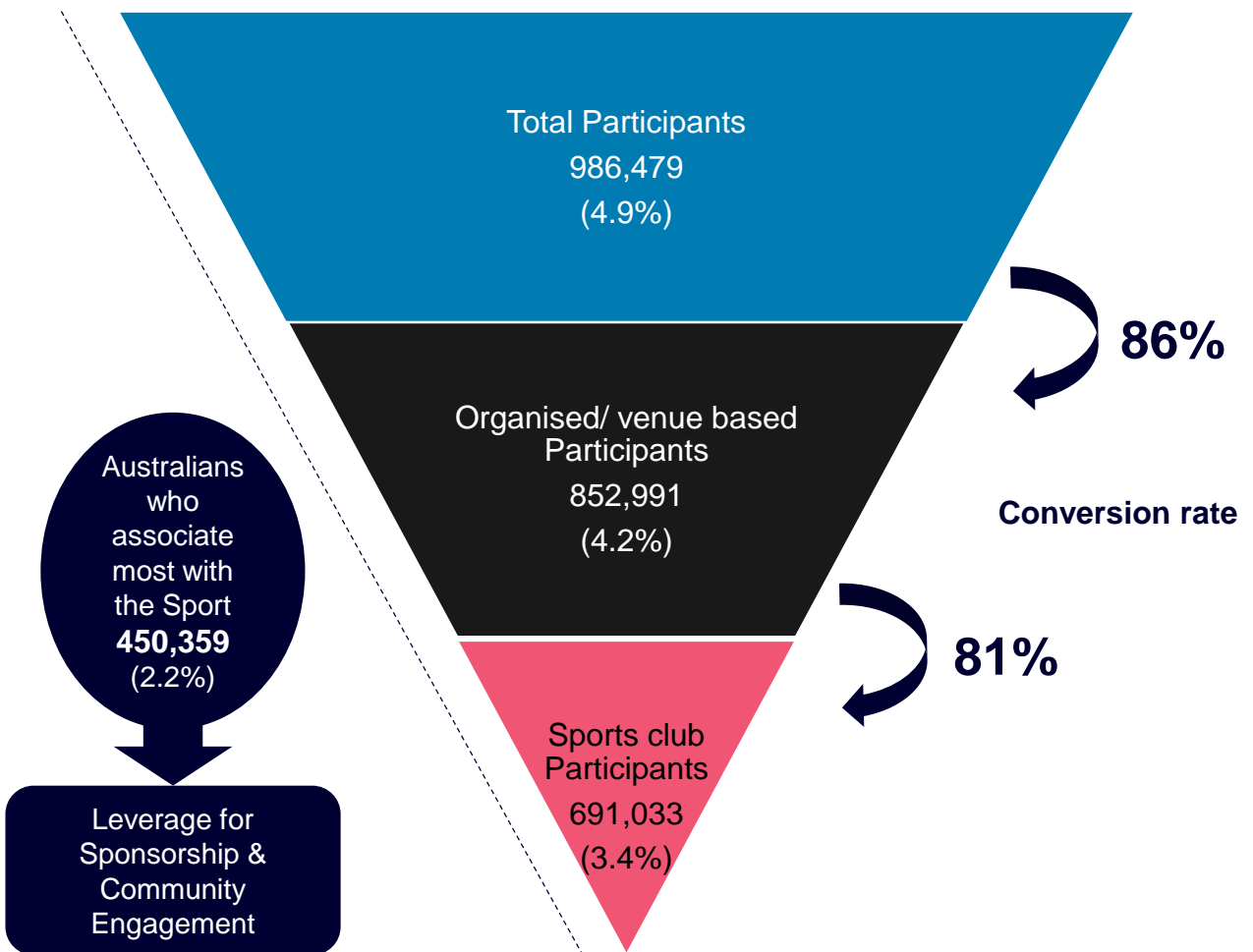


Information on this page provides a snapshot of the Adult 15+ Population, in terms of total participation, organised/venue based participation and sports club participation.

Conversion figures show the conversion from one level to the next.

This highlights opportunities to build on the total participation base to drive increased organised/venue based participation and sports club participation.

Golf Association & Participation Levels



Golf (Adults 15+) Engagement



AusPlay data, Adult and Golf Participant Population 15+: January 2016 to December 2018
 Adult 15+ n=61,579; Golf Participants 15+ n=3,379

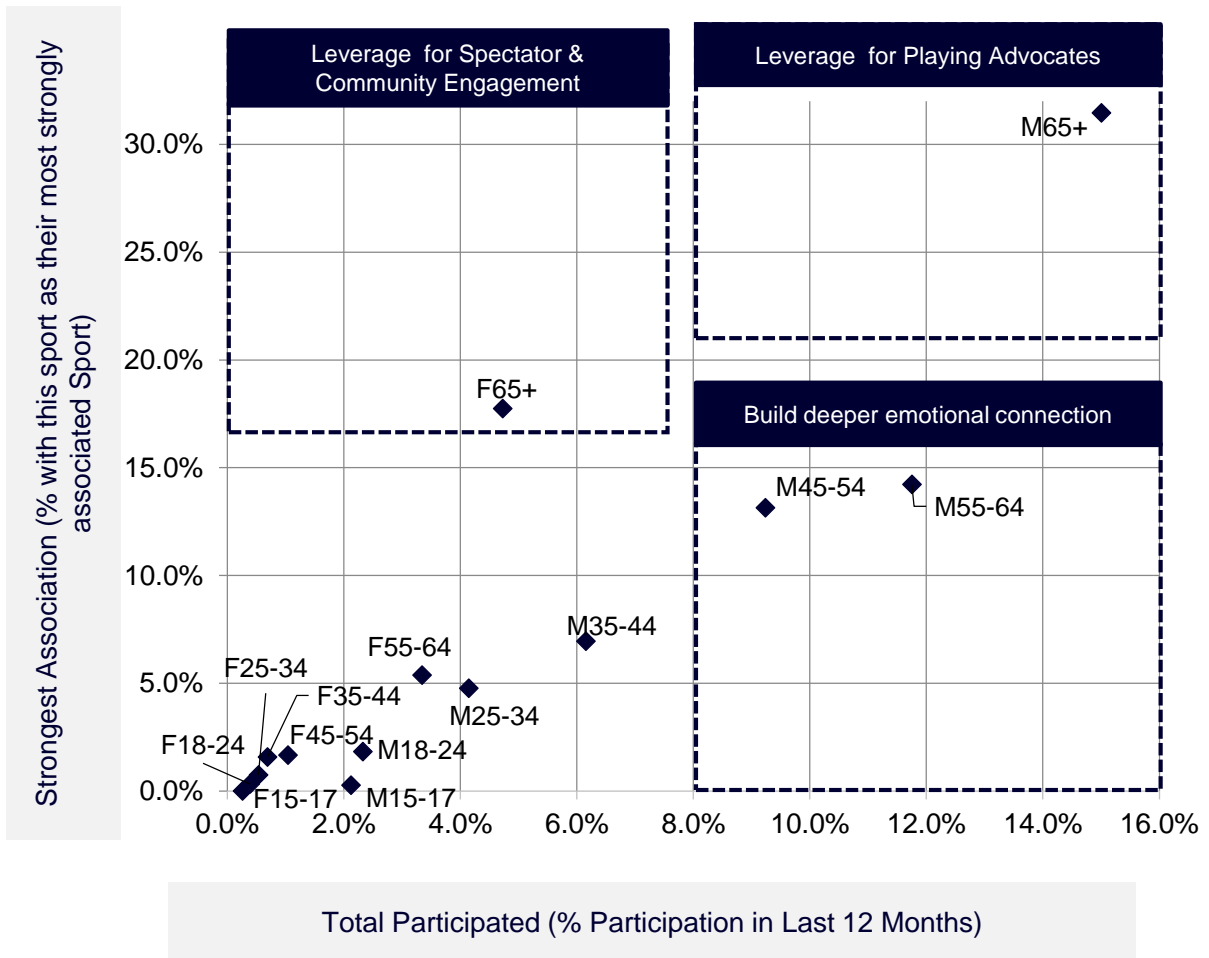


Information on this page provides a snapshot of the Adult 15+ Population in terms of participation and the % of the Adult 15+ Population who have nominated this as the sport they most strongly associate with.

Figures are shown by age and gender groups, with those in the top right section being the most active on both measures.

This highlights opportunities to leverage demographic groups that have a strong association with a sport and those who participate.

Participation & Association by Age



Golf (Adults 15+)

Spend Profile



AusPlay data, Golf Participant 15+: January 2016 to December 2018 n=3,379

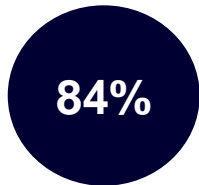


Information on this page provides a snapshot of the Adult 15+ Population, in terms of paid participation.

Figures shown are based on annual spend.

Median and average annual spend figures illustrate the incremental annual uplift in expenditure on participation that can be attributed to each additional person who pays to participate in this sport.

Golf Overall Spend Levels



of participants paid to participate

	All	Club
Median annual spend	\$730	\$800
Average annual spend	\$1,241	\$1,320
Share of total spend (Share of all activities participated in)	11.5%	30.1%



Total expenditure on all participation

\$985,588,071



Total expenditure on **club** participation

\$861,866,275

Participation Spend by Gender	Total	Male	Female
Paid to Participate (%)	83.5%	83.0%	85.8%
Paid to Participate (People)	824,185	662,436	161,749
Average annual spend per participant	\$1,241	\$1,252	\$1,197
Total national annual spend	\$985.6M	\$801.1M	\$184.5M

Golf (Adults 15+)

Market Outlook & Opportunity



AusPlay data, Adult Population 15+: January 2016 to December 2018 Adult 15+ n=61,579

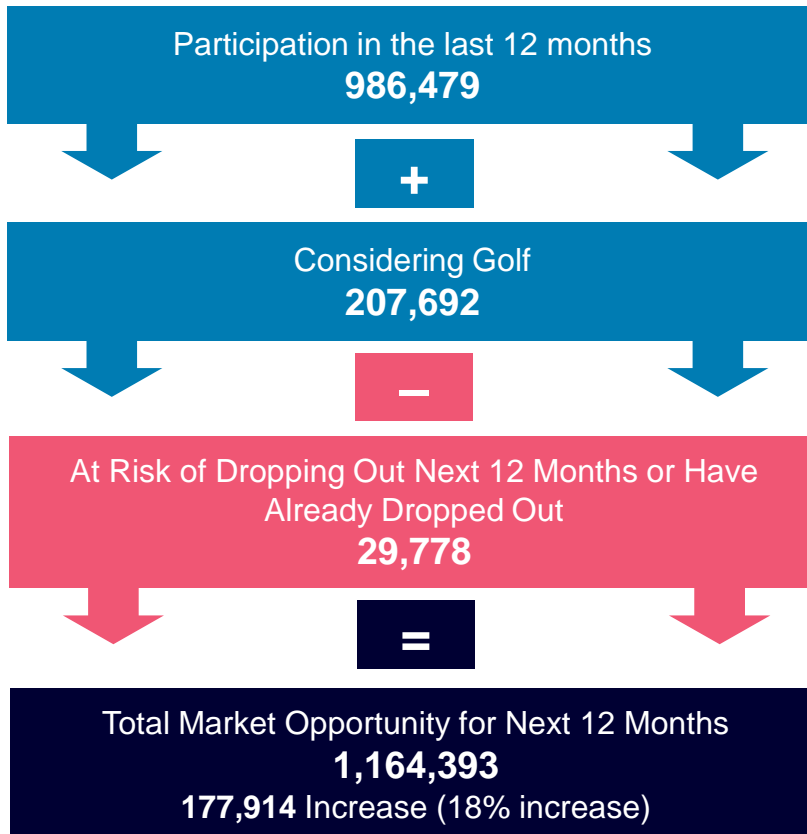


Information on this page provides a snapshot of the Adult 15+ Population in terms of market opportunity.

Figures shown represent volume of Adults 15+.

The gap between those considering this sport and those at risk of dropping out/ have already dropped out represents the net increase in total market opportunity.

Golf Market Opportunity



Golf (Adults 15+)

Market Outlook & Opportunity



AusPlay data, Adult Population 15+: January 2016 to December 2018 Adult 15+ n=61,579



Information on this page provides a snapshot of the Adult 15+ Population by gender and age in terms of market opportunity.

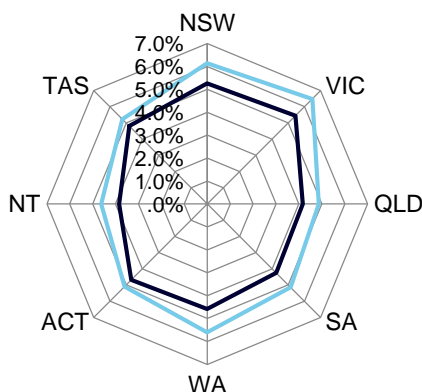
Figures shown represent the volume of people and %'s.

This highlights the strongest opportunities by gender and age, with the gap between those considering this sport and those at risk of dropping out/ have already dropped out representing the net increase in market opportunity among each group.

Golf Market Opportunity by Gender & Age

	TOTAL	♂	♀	15-24	25-44	45-64	65+
Participants – last 12 months (%)	4.9%	8.0%	1.9%	1.3%	2.9%	6.2%	9.5%
Participants – last 12 months (People)	986,479	797,943	188,535	42,344	200,805	379,211	364,118
Considering Next 12 Months (%)	1.0%	1.5%	0.5%	0.3%	0.7%	1.5%	1.5%
Considering Next 12 Months (People)	207,692	153,969	53,723	10,256	46,360	94,455	56,622
At Risk of Dropping Out or Have Already Dropped Out (%)	3.0%	2.6%	5.0%	8.9%	2.7%	1.6%	4.1%
At Risk of Dropping Out or Have Already Dropped Out (People)	29,778	20,384	9,394	3,781	5,325	5,919	14,753
Net Gain/ Loss (People)	177,914	133,585	44,329	6,475	41,035	88,535	41,869
Projected (People)	1,164,393	931,529	232,864	48,819	241,841	467,746	405,987

Golf Market Opportunity by State



— Current Participation
 — Projected Participation

This shows market opportunity by state, on a per capita basis.

Golf (Adults 15+)

Motivations for Participation



AusPlay data, Golf Participant 15+: January 2016 to December 2018 n=3,379

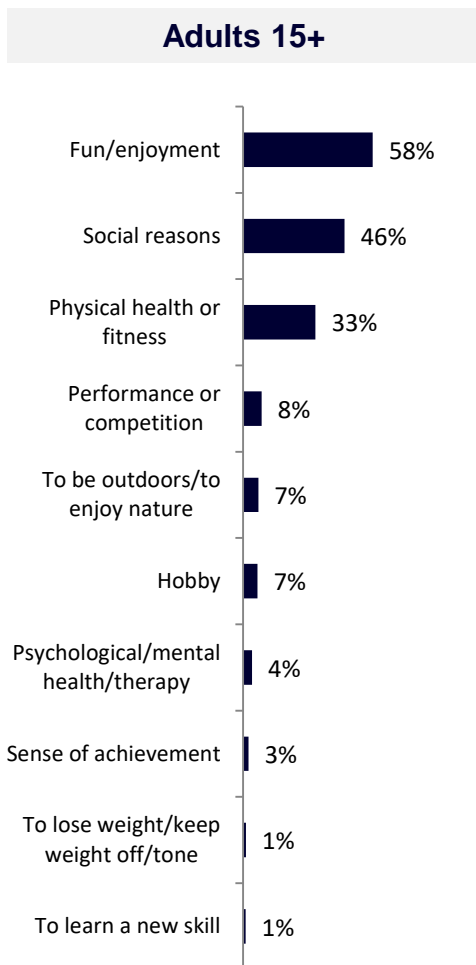


Information on this page provides a snapshot of the Adult 15+ Population as well as by gender and age in terms of motivations to participate.

Adult 15+ motivations are shown to the left and gender and age specific motivations are shown to the right.

This highlights the dominant overall motivations as well as similarities and differences at age and gender level. When designing strategies, products or messaging to engage with specific demographic groups, these should be built around the core motivations of that audience.

Top 10 Motivations to Participate*



By Gender			
	1st	2nd	3rd
Male	Fun/ enjoyment	Social reasons	Physical health/ fitness
Female	Fun/ enjoyment	Social reasons	Physical health/ fitness

By Age			
	1st	2nd	3rd
15-17	Fun/ enjoyment	Social reasons	Performance or competition
18-24	Fun/ enjoyment	Social reasons	Physical health/ fitness
25-34	Fun/ enjoyment	Social reasons	Physical health/ fitness
35-44	Fun/ enjoyment	Social reasons	Physical health/ fitness
45-54	Fun/ enjoyment	Social reasons	Physical health/ fitness
55-64	Fun/ enjoyment	Social reasons	Physical health/ fitness
65+	Fun/ enjoyment	Social reasons	Physical health/ fitness

* Multiple response question



Golf (Adults 15+)

Top 10 Reasons for Drop Out or Consideration



AusPlay data, Adult Golf Participants 15+, that are dropping out of participation in the next 12 months: January 2016 to December 2018 n=110; Adult Population 15+: n=61,579;

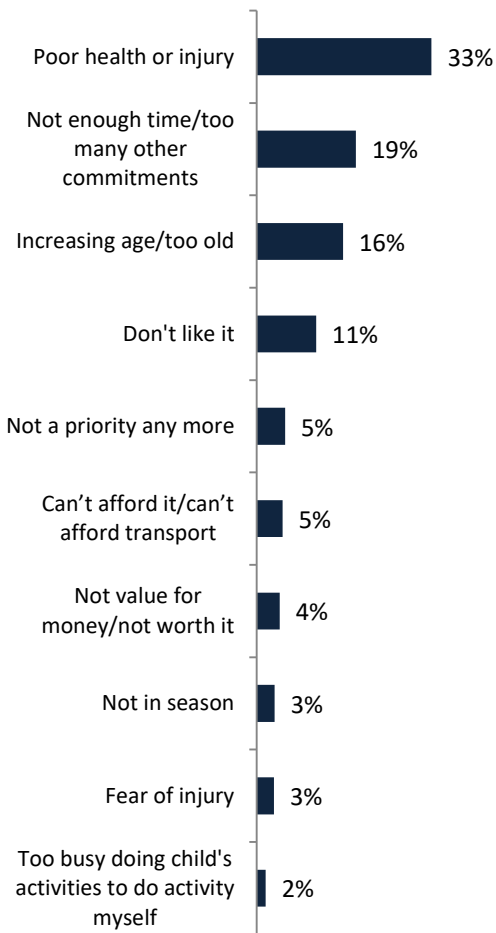


Information on this page provides a snapshot the top 10 reasons for dropping out as well as the top 10 reasons for considering this sport.

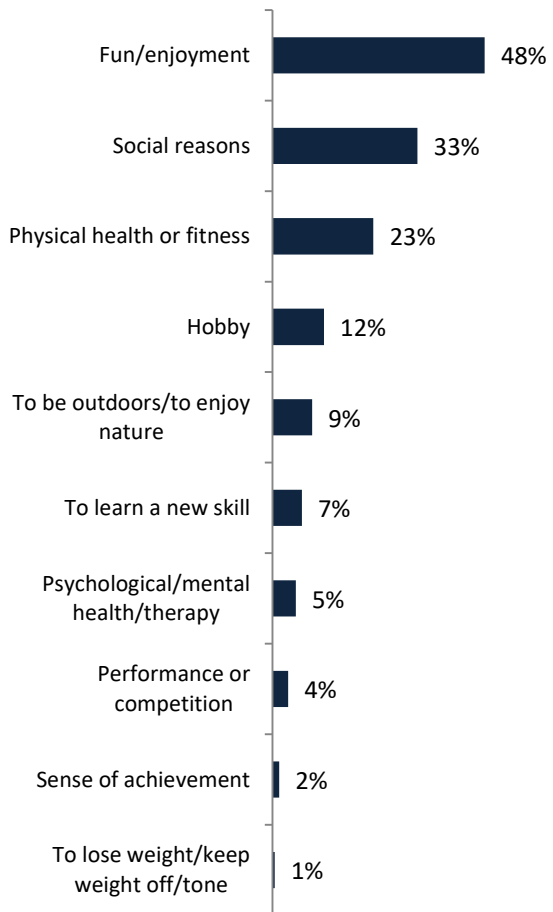
Responses are multiple response, meaning more than one reason can be given.

Identifying reasons for dropping out can play a role in identifying opportunities for innovations in product portfolio or alternate sport formats. Identifying reasons for consideration can play a role in optimising messaging, communications and advertising.

Top 10 Reasons for Drop Out



Top 10 Reasons for Consideration



* Multiple response question



Where to from here?







More information about AusPlay, including the methodology summary, survey questions, key terms and definitions, national tables etc., can be accessed via Sport Australia's Sport Market Insights on the Clearinghouse for Sport website (with direct access through researchinsport.com.au). Please use your Clearinghouse for Sport login for full access.

Any further questions about AusPlay (or queries for additional customised reporting/further analysis of the dataset) can be directed to Sport Australia via: AusPlay@sportaus.gov.au.



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Australian Sports Commission

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