GolfAustralia

Victorian Golf Facilities and Infrastructure Strategy

Delivering golf facilities for the next generation.

August, 2022

Australian Golf acknowledge the Traditional Owners and custodians of the lands which golf is played and managed throughout Australia. We recognise the continuing connection to land, waters and culture of the Indigenous community and pay our respects to their Elders past, present and emerging.

TABLE OF CONTENTS

Acknowledgements

Australian Golf wishes to thank a number of stakeholders for their significant contribution to the development of the Victorian Golf Facilities and Infrastructure Strategy.

- The Victorian Government for their financial support and strategic guidance.
- The Victorian golf community including districts, clubs and individual members and golfers that have provided input via the workshops and participant survey.
- Key golf industry stakeholders and strategic partners including Golf Australia, Professional Golfers Association of Australia, Women's Professional Golfers Association Tour of Australasia, Public Golf Facilities Australia, Australian Sports Turf Managers Association, Golf Management Australia (Victoria), Society of Australian Golf Course Architects, Sport Australia, Parks and Leisure Australia, and the Board of Golf Victoria.
- Over 50 local government representatives who participated in the online workshops.
- SBP Advisory for their consulting advice throughout the project.

Foreword

On behalf of Golf Australia, the PGA of Australia and the WPGA Tour of Australasia, we are delighted to introduce the Victorian Golf Facilities and Infrastructure Strategy that will guide the delivery of golf facilities and infrastructure in Victoria for the next generation.

The Victorian Golf Facilities and Infrastructure Strategy has been developed to provide a framework that enables golf and its strategic partners to better understand and prioritise its facility needs, and to ensure the many benefits that the game provides can continue to be delivered.

Golf clubs and facilities are found in every part of the state and typically have deep, longstanding roots in their local community. Those who play the game are young and old, people of all genders and come from a wide variety of socio-economic and ethnic backgrounds.

There is no doubt that our facilities are integral to the golf experience. Whether your first interaction with golf was on a public course, a member's course, playing mini golf, or hitting balls at a driving range, everyone has a lasting memory of the first time they played the game.

The Victorian Golf Facilities and Infrastructure Strategy provides us with a once in a generation opportunity to establish golf for the future and redefine how golf is perceived by the community – and also how golf as an industry, engages with the community.

The strategy will help to provide Victoria's golf clubs and facilities with clarity and direction in their facility planning and development objectives, especially when recovering from the significant economic impact of the COVID-19 pandemic on our industry.

We are motivated by our core purpose of encouraging more people to play more golf and are united in our belief that all golf is golf, and that all of us can be golfers. Those of us playing, volunteering, and working at golf facilities understand that golf is a sport for life and fun for all, and our responsibility as custodians of golf is to promote that message far and wide.

Central to our responsibility to growing the game is ensuring we build and maintain access to all golf courses and facilities. Victoria is blessed with some of the best courses and golfing experiences in the world. There are few other locations which have the level of access to such high-quality golf courses. This makes our facilities a significant tourism asset for Victoria, drawing in visitors from interstate and overseas, and contributing over $70 million to the Victorian economy.

We firmly believe that as the game for life, golf will continue to be an integral part of the Australian sporting landscape. As a sport for all ages, golf has a significant role to play in the recovery and rebirth of the community as it recovers from the physical, mental and economic effects of COVID-19.

We look forward to working together with all stakeholders in the rollout of the Strategy's recommendations to ensure that golf facilities around the state can continue to be places for everyone to visit and enjoy.

James Sutherland
CEO – Golf Australia

Karen Lunn
CEO – WPGA Tour of Australasia

Gavin Kirkman
CEO – PGA of Australia

STRATEGY AT A GLANCE

Our Vision

To transform Victorian golf clubs and facilities to be fun, engaging, modern, thriving and sustainable community hubs.

Through the development and implementation of this strategy, Australian Golf aims to deliver the following key strategic outcomes by 2025:

1 million Victorians
participating in golf across all formats of the game.

Establish an ongoing Community Golf Infrastructure Fund
with the Victorian Government to support facility and infrastructure projects.

Delivery of 15 major golf facility projects
across the state, making golf more engaging and accessible to the broader community.

Grow the investment in golf facility projects by 50%
through funding from government, philanthropy and private enterprise.

20% increase in the number of alternative golf facilities
and offerings, including mini golf, driving ranges and short courses.

No net loss
of Council owned golf courses.

2 new public golf facilities
in population growth areas.

VGFIS STRATEGIC FRAMEWORK

OUR PURPOSE More Victorians playing more golf	OUR PHILOSOPHY All golf is golf and all of us can be golfers	OUR POSITIONING A sport for life and fun for all

Strategic Focus Areas	Tell our story better	Attract new golfers	Grow our core	Grow investment	Work together
Ambition	Golf clubs and facilities are seen as modern, innovative, fun and inclusive environments.	Inspiring and innovative golf facilities become the drawcard that attracts new audiences to golf.	Golf clubs and facilities are vibrant, solvent, sustainable businesses.	Sustainable partnerships with key stakeholders and partners to invest in impactful golf facility projects.	Key stakeholders aligning strategies to grow the game.
What is success?	More clubs and facilities engaging with more people each year.	More golfers having great golf experiences at clubs and facilities.	Healthy clubs and facilities that entice, inspire and are reflective of their community.	Revenue growth and increased investment into impactful golf facility projects.	Increased community engagement and connection with our facilities.
What we will do	• Recognise, celebrate and promote successful community golf facility case study projects that highlight best practice. • Develop and continually reinforce the narrative of Australian Golf's strategic direction. • Elevate Golf's engagement with all levels of government with a focus on local government. • Embed the community benefits of golf as a key advocacy resource.	• Understand and promote how golf facilities can facilitate increased engagement and attract new audiences. • Identify priority areas for community golf hubs and new or upgraded golf facilities. • Encourage private investment into innovative golf entertainment products. • Continue to work with clubs and facilities to implement Vision 2025: The Future of Women and Girls in Golf.	• Develop guiding principles for the provision and design of new and existing golf facilities. • Continually update the National Golf Facility Audit data. • Provide research and guidance for decision makers at golf facilities to enhance environmental and financial sustainability. • Work more closely with clubs and facilities to address infrastructure deficiencies which negatively impact the participant experience.	• Partner with the Victorian Government to establish a Golf Community Infrastructure Fund. • Grow the PlayGolf Fund initiative to support innovative, entertainment-based golf facilities. • Pursue philanthropic and other external funding opportunities.	• Partner and/or work with facility operators and owners, property developers and government on all golf facility projects. • Investigate the creation of a Golf Facility Development Advisory Group. • Facilitate the sharing of learnings and insights from successful golf infrastructure projects. • Embrace innovation and a growth mindset when planning and developing golf facilities.
Key Success Measures	• Improved community perception of golf. • Increase in positive media articles relating to facilities. • No net closures of Council owned golf facilities.	• Growth in the number of golfers across all formats. • Increased female participation. • Increased participation across all demographics. • Increased access to alternative formats.	• Improvement in the minimum standard golf offerings. • Improved environmental sustainability of clubs and facilities. • Improved financial sustainability and health of clubs and facilities.	• Revenue growth for investing in golf facility projects. • More diverse golf facilities. • Accessibility of the game to 80% percent of the Victorian population.	• Increased involvement by GA in golf facility projects. • Golf Australia is regarded as a trusted source regarding facility planning and development

INTRODUCTION

Purpose of the Strategy

The purpose of the Victorian Golf Facilities and Infrastructure Strategy (VGFIS) is to guide the future planning and investment into golf facility and infrastructure projects in Victoria to enable ***more Victorians to play more golf***.

This aligns with the Victorian Government's vision within the Active Victoria strategy, which is: ***An increased proportion of Victorians participating in sport and active recreation.***

Our Vision

Our vision for this strategy is: ***To transform golf clubs and facilities to be fun, engaging, modern, thriving and sustainable community hubs.***

Target Audience

This strategy sets the foundation for a collaborative approach and provides strategic direction to a broad range of stakeholders, including:

- Golf Australia, PGA of Australia and WPGA Tour of Australasia
- Golf Club and Facility Owners, Managers and Operators
- Club Boards and Committees
- Local Government Authorities
- Victorian Government
- Federal Government
- Land and Property Developers

Scope of this Strategy

The VGFIS provides a strategic approach to planning and improving both golf *facilities* and supporting *infrastructure*, to encourage more Victorians to play more golf.

For the purposes of this report, the following definitions are used to define and differentiate between facilities and infrastructure.

Facilities: A place or destination provided for the particular purpose of engaging in the game of golf. This may include golf courses (including short courses) as well as stand alone driving ranges, mini golf courses and golf simulators.

Infrastructure: The physical buildings and structures within a facility (e.g. clubhouses, pavilions, maintenance sheds, cart storage and paths) needed for the operation of a golf facility. Where a facility has multiple formats of golf offered, elements such as driving ranges and mini golf courses are considered as infrastructure.

NATIONAL STRATEGY ALIGNMENT

During 2021, the Australian golf industry embarked on an ambitious plan to create Australian Golf's first ever **all-of-sport** national strategy. The strategy led by Golf Australia, in conjunction with the PGA of Australia and the WPGA Tour of Australasia was developed with a focus on golf being able to achieve its true potential by addressing the sport's current challenges, supporting a sustainable future, and capitalising on opportunities for growth.

At the core of the Australian Golf Strategy are the '3Ps' – Purpose, Philosophy and Positioning. These are the key strategic statements which will guide the game and from which the VGFIS has been developed.

OUR PURPOSE More Australians playing more golf	OUR PHILOSOPHY All golf is golf and all of us can be golfers	OUR POSITIONING A sport for life and fun for all

To ensure consistency and alignment between the two strategies, the strategic focus areas of the VGFIS have been aligned with those of the Australian Golf Strategy 2022-2025. Below is an overview of the VGFIS framework:

Strategic Focus Areas	Tell our story better	Attract new golfers	Grow our core	Grow investment	Work together
Ambition	Golf clubs and facilities are seen as modern, innovative, fun and inclusive environments.	Inspiring and innovative golf facilities become the drawcard that attracts new audiences to golf.	Golf clubs and facilities are vibrant, solvent, sustainable businesses.	Sustainable partnerships with key stakeholders and partners to invest in impactful golf facilities.	Key stakeholders aligning strategies to grow the game.
What is success?	More clubs and facilities engaging with more people each year.	More golfers having great golf experiences at clubs and facilities.	Healthy clubs and facilities that entice, inspire and are reflective of their community.	Revenue growth and increased investment into impactful golf facility projects.	Increased community engagement and connection with our facilities.

PROJECT INPUTS AND OUTPUTS

Project Inputs

The extensive stakeholder consultation for this project informed the key findings, identification of the key issues and shaped the key strategic recommendations.

This consultation included:

- Online participant survey with 4,524 responses.
- 16 depth interviews with GA staff members and Golf Australia and Golf Victoria Board members.
- 22 interviews with key industry stakeholders.
- 12 workshops with local government, involving over 50 representatives.
- 14 workshops with members of the Victorian golf community across regional and metropolitan Victoria.
- 5 additional in-depth interviews with stakeholders unable to attend workshops.
- 2 women and girls' engagement workshops.

Additionally, analysis of each of the 18 Victorian Golf Regions has been underpinned by detailed facility audit data collected by Golf Australia staff and a data model developed by SBP Advisory based on numerous data sources and the extensive research conducted through this project. This provided an updated inventory and map of all golf facilities, including golf courses, short courses, mini golf, driving ranges and simulators across Victoria and also identified areas of under supply and accessibility challenges.

Project Outputs

The strategy has been developed to provide future direction and recommended actions that are realistic, achievable and inform resource requirements to enable strategic decision making and leadership in current and future facility provision and condition across the state, including:

- Understanding of the current state of golf participation and infrastructure in Victoria.
- Understanding of key strategic issues and opportunities relating to golf participation and infrastructure in Victoria.
- Provision and mapping analysis of golf facilities in Victoria.
- Current and potential golf market analysis and population analysis to determine the optimal types and mix of golf facilities including oversupply and growth opportunities.
- Strategic recommendations to address key issues and capitalise on opportunities.
- Case studies that support and provide evidence to the growth opportunities and strategic initiatives.

Community Benefits of Golf

The Community Impact of Golf in Victoria Study was undertaken alongside the VGFIS to demonstrate the economic, health, social and environmental benefits that golf contributes to the Victorian community.

The report found that in 2020, golf contributed a total of **$912.10 million** to the Victorian community. This is made up of the following:

$714.82m
Economic Benefit

The golf industry supported nearly $715 million of economic activity in Victoria.

$63.99m
Health Benefit

Regular participation in golf provides mental and physical health benefits across the lifespan.

$133.29
Environmental Benefit

Golf's 'footprint' of green infrastructure provides significant benefits to the natural environment.

In addition, each golf course (on average) currently contributes to its local community:

- **200,000** hours of physical activity and social interaction each year
- **50** hectares of open space and environmental / ecological habitats
- **$120,000** contributions to charitable causes
- **$1.75m** expenditure
- **10.6** jobs

Market Size

In 2021, the Australian Golf Industry Council (AGIC) commissioned a large-scale research project that was designed to strategically map the golf landscape and identify key priorities for growing the game.

The research identified five key segments, of varying levels of interest and participation in golf:

- Members
- Round Players
- Ball Hitters
- Alternative Players
- Not Engaged Yet

These segments are explored in detail in the **Key Participation Growth Opportunities** section of the report.

The market size of each segment has been calculated for Victoria according to the national research and adjusted based on the key sources of AusPlay and GOLF Link. Based on these calculations, **the total market size of golf in Victoria, is 2.3 million people, including 1.5 million who are not yet engaged.**

Using the health benefit modelling developed for the Community Impact Study, **the total annual benefit to Victoria of attracting the "Not Engaged Yet" segment is $268.4 million.**

KEY FINDINGS

GolfAustralia

Total Golf Participants

822,617 (Across all formats)

14%

Victorian Population have played a format of Golf

2.6m Rounds

Of Competition Golf played in Victoria during 2020/21

Golf Participant Breakdown

108,027 **Golf Club** Members

213,590 **Round Playing** Participants

76,000 **Driving Range** Users

425,000 Participants Engaged in **Alternative Formats**†

500,000+ **Off-Course Golf Participants**

321,617 **Active Golfers*** playing 'green grass' golf

Golf Club Members in Victoria

5.4% **Victorian Population** are Active Golfers

21% **Female Members**

41% **Members** are from Regional Victoria

+8.9% **Golf Club Membership** increased during 2021

*Active Golfers are defined as playing one round of golf over the past 24-months.
† Includes formats such as Holey Moley, Mini Golf, Big Hole Golf, Speed Golf, Foot Golf.

Sources: GOLF Link, Golf Australia, AGIC, ABS

Facility Provision

In total, there are 414 golf facilities across Victoria, with 270 in Regional Victoria and 144 in Metropolitan Melbourne. There are 310 member courses, 38 public courses and 103 facilities that offer alternative formats (driving ranges, mini golf, simulators and short courses).

	Unique Golf Facilities	Member Courses*	Public Courses	Short Courses	Driving Ranges	Simulators	Mini Golf
Metropolitan Melbourne	144	72	34	2	24	15	25
Regional Victoria	270	238	4	2	11	4	26
Total	**414**	**310**	**38**	**4**	**35**	**19**	**46**

* Includes Member Courses that provide green fee access to the public.

GOLF FACILITIES AUDIT FINDINGS

Clubhouses are outdated, ageing, and in poor condition

73% Clubhouses
Built over 30 years ago

38% Clubhouses
In less than "Good" condition

40% Changerooms
Do not meet female friendly design standards

Maintenance infrastructure are in poor condition and in need of upgrade

24% Irrigation systems
In "Poor", "Very Poor" or "Unusable" condition

69% Maintenance/Storage Facilities
Are over 20-years old

53% Maintenance/Storage Facilities
In "Moderate", "Poor", "Very Poor" or "Unusable" condition

Limited product and service offering

80% Clubhouses
Have bar facilities

28% Clubhouses
Have café/restaurant facilities

79% Golf courses
Do not have a standalone driving range

12% Golf courses
Offer mini golf as a participation option

Access and inclusion is a key issue across the facility network

51% Golf facilities
Do not have accessible parking spaces

12% Clubhouses
Have no accessible entry to building

59% Golf facilities
Have no public transport access within 500m

13% Golf courses
Have sealed cart paths

PROVISION ANALYSIS AND ACCESSIBILITY – METROPOLITAN MELBOURNE

To understand the accessibility to golf facilities, an approximate drive-time catchment for each golf facility was calculated using isochrone analysis. A 15-minute drive-time catchment was used to assess the overall accessibility of a golf facility. While some participants may travel further to reach a golf club or facility, this travel time is particularly relevant for new market segments, who would not expect to travel more than fifteen minutes to try a new activity (comparable to other recreation and entertainment activities).

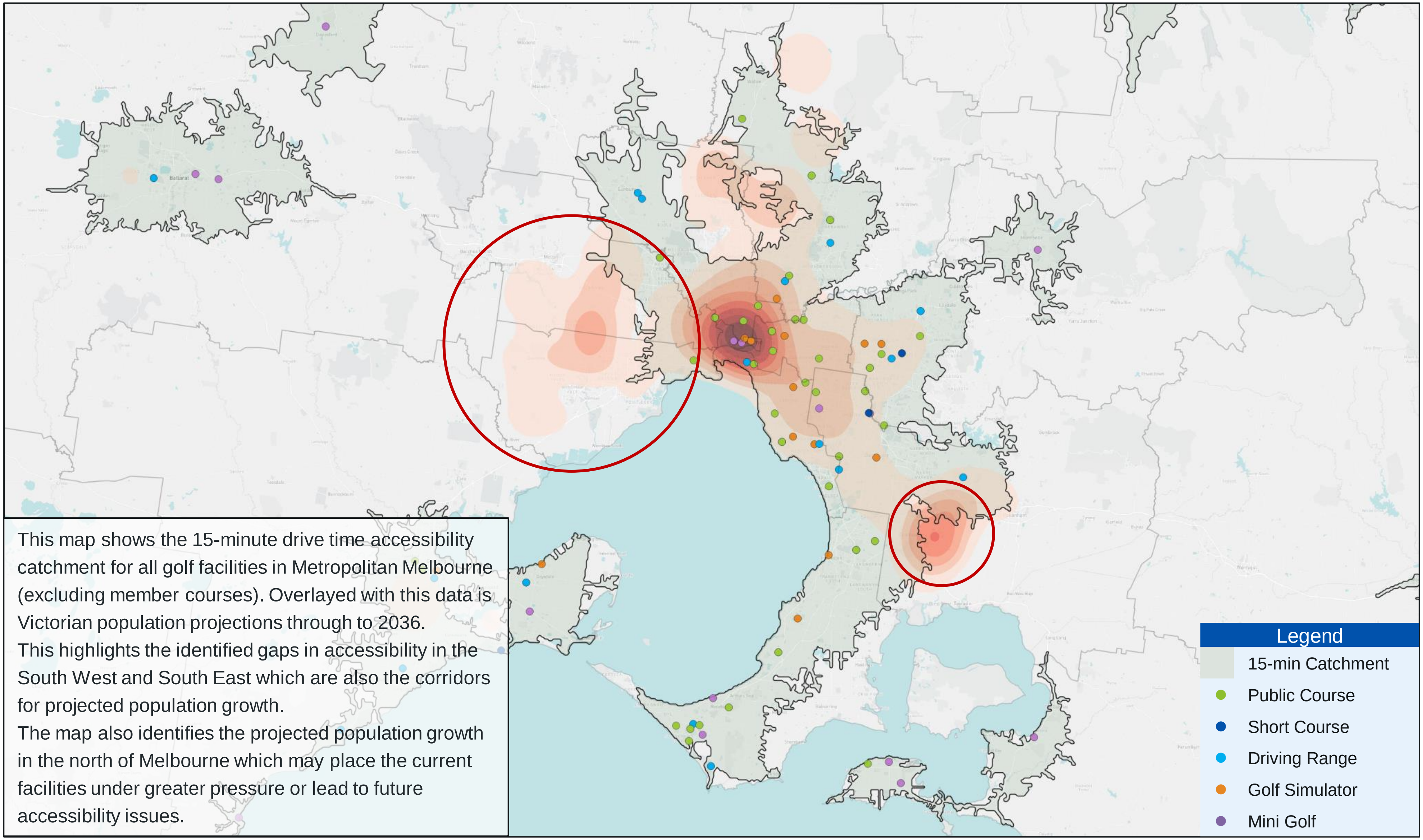
This catchment also provides a useful measure to assess the strategic objective of having 80% of the population within a 'reasonable' distance from a golf facility. The results from this analysis are shown over the following pages.

The catchment analysis shows that over 68% of the Metropolitan Melbourne community can access a public golf course within a 15-minute drive.

Projected Population Change (2021 – 2031) | **Population Accessibility by Golf Facility 2021**

	2021	2031	Change		Member Course	Public Course	Short Course	Driving Range	Simulator	Mini Golf
Metro Melbourne	**5,045,764**	**6,327,486**	**1,281,722**	**25%**	**87%**	**68%**	**<1%**	**64%**	**10%**	**22%**
Peninsula	310,279	348,199	37,920	12%	99%	82%	**No Provision**	82%	71%	**33%**
Metro Inner East	595,545	709,925	114,380	19%	91%	99%	8%	**56%**	99%	**51%**
Metro South East	866,324	1,116,660	**250,336**	**29%**	97%	74%	59%	78%	66%	63%
Sandbelt	561,489	657,145	95,656	17%	85%	100%	8%	83%	99%	90%
Metro South West	454,018	651,226	**197,208**	**43%**	88%	**35%**	**No Provision**	**20%**	**19%**	**25%**
Metro West	478,219	652,530	**174,311**	**36%**	75%	68%	**No Provision**	64%	**10%**	**22%**
Metro Outer East	534,485	594,569	60,084	11%	86%	81%	70%	79%	62%	83%
Metro North West	688,750	875,498	**186,748**	**27%**	94%	71%	**No Provision**	64%	47%	60%
Metro North East	556,655	721,734	**165,079**	**30%**	**64%**	78%	**No Provision**	83%	38%	71%
Regional Victoria	**1,550,081**	**1,786,562**	**236,481**	**15%**	**86%**	**10%**	**11%**	**33%**	**16%**	**29%**
Statewide	**6,595,845**	**8,114,048**	**1,518,203**	**23%**	**87%**	**61%**	**17%**	**60%**	**48%**	**51%**

ACCESSIBILITY OF ALL GOLF FACILITIES (EXCLUDING MEMBER COURSES)



PROVISION ANALYSIS AND ACCESSIBILITY – REGIONAL VICTORIA

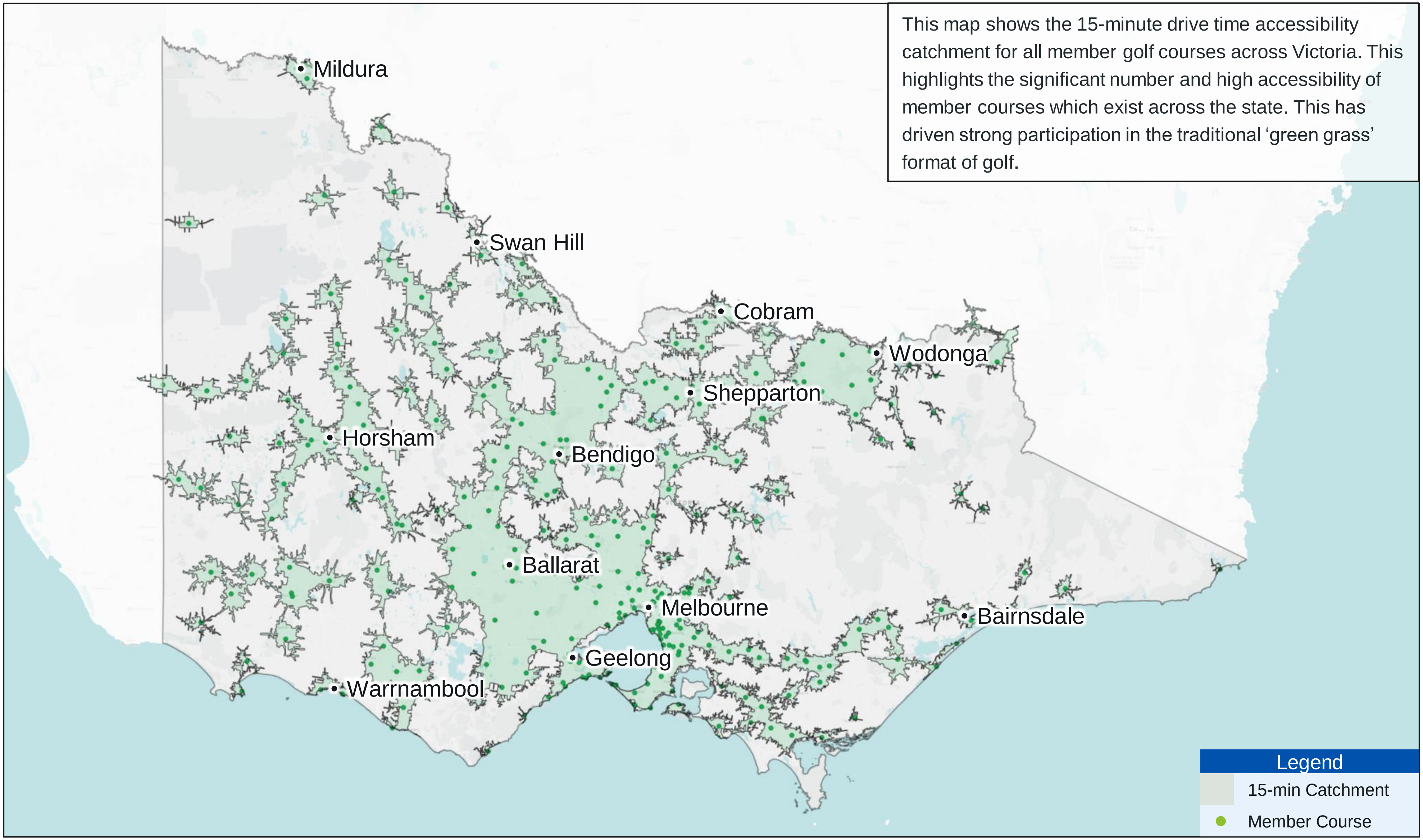
While Regional Victoria is well provided for in terms of Member Courses, it is important to note many of these courses also take green fee players. Therefore, unlike in Metro Melbourne, public accessibility to a golf course can be aligned with total golf course provision. It is noted that accessibility in regions along the Murray River may be higher due to golf facilities in NSW.

Access to alternative formats of the game is a key priority for Regional Victoria, given the low provision of short courses, driving ranges, simulators and mini golf.

	Projected Population Change (2021 – 2031)				Population Accessibility by Golf Facility 2021					
	2021	2031	Change		Member Course	Public Course	Short Course	Driving Range	Simulator	Mini Golf
Regional Victoria	**1,550,081**	**1,786,562**	**236,481**	**15%**	**86%**	**10%**	**11%**	**33%**	**16%**	**29%**
Barwon	310,128	397,047	**86,919**	**28%**	97%	50%	55%	77%	68%	**25%**
La Trobe Strzelecki	128,876	150,217	21,341	17%	88%	No Provision	**No Provision**	**24%**	33%	**No Provision**
Central Highlands	167,552	197,715	30,163	18%	90%	No Provision	No Provision	58%	No Provision	68%
Wimmera - Mallee	152,106	153,386	1,280	1%	86%	No Provision	No Provision	26%	No Provision	37%
Goulburn	130,776	146,593	15,817	12%	86%	No Provision	No Provision	38%	No Provision	33%
Loddon Campaspe	233,177	270,921	37,744	16%	85%	No Provision	No Provision	30%	No Provision	39%
North East	144,030	162,976	18,946	13%	78%	**3%**	**No Provision**	**2%**	**No Provision**	**No Provision**
West Coast	125,360	128,947	3,587	3%	78%	No Provision	No Provision	No Provision	No Provision	34%
Gippsland	158,076	178,760	20,684	13%	70%	5%	**No Provision**	**No Provision**	**No Provision**	**15%**
Metro Melbourne	**5,045,764**	**6,327,486**	**1,281,722**	**25%**	**87%**	**68%**	**<1%**	**64%**	**10%**	**22%**
Statewide	**6,595,845**	**8,114,048**	**1,518,203**	**23%**	**87%**	**61%**	**17%**	**60%**	**48%**	**51%**

ACCESSIBILITY OF MEMBER COURSES

This map shows the 15-minute drive time accessibility catchment for all member golf courses across Victoria. This highlights the significant number and high accessibility of member courses which exist across the state. This has driven strong participation in the traditional 'green grass' format of golf.



GOLF FACILITY INVESTMENT PRIORITY AREAS

Regions with high population growth, but low facility provision are priority areas for future facility development projects. In addition, regions that currently have poor accessibility to different types of golf facilities will require additional investment to ensure an equitable provision of golf facilities across the state – and to grow the game in new markets.

Metropolitan Melbourne

- **Metro West** has high population growth (+36%), and low provision of golf facilities in general. This region has the poorest access to short courses (none), simulators (10%) and mini golf (22%).
- The **Metro South West** region has high population growth (+43%), and low provision of public golf courses (35%) and short courses (none).
- Overall access to golf facilities in the **Peninsula** region is relatively high, however there is poor accessibility to mini golf (33%) and there are no short courses.
- While **Metro Inner East** is well-serviced by golf courses, this region has the lowest accessibility to driving ranges (56%) across the metropolitan area.

Regional Victoria

- There is **poor access to alternative formats of golf** across regional Victoria, with low provision of short courses, driving ranges, simulators and mini golf across all regions.
- The **North East** region has the lowest provision of 'non-green grass' golf facilities. It has no mini golf, short courses, or simulators, and only 2% of the population has access to a driving range.
- The **Latrobe Strzelecki** region has no access to mini golf or short courses.
- While **Barwon** has the highest provision of courses in Regional Victoria (97%), it lacks access to mini golf facilities (25%). As this region has the highest forecasted population growth, ensuring there is provision of facilities at all levels of the golfing journey will be important to growing the game.
- Similar to the North East region, **Gippsland** has relatively low accessibility to all formats of golf, with no provision of short courses, driving ranges ad simulators, and only low accessibility to mini golf.

Facility Type Investment Priorities

Public Courses
- Metro South West

Driving Ranges
- Metro South West
- Metro Inner East
- North East
- Latrobe Strzelecki

Short Courses
- Regional Victoria
- Peninsula
- Metro South West
- Metro West
- Metro North West
- Metro North East

Simulators
- Regional Victoria
- Metro South West
- Metro West

Mini Golf
- Metro South West
- Metro West
- Peninsula
- Barwon
- Latrobe Strzelecki
- North East
- Gippsland

Note: Further detail about specific facility priorities for each region can be found in Appendix 1: Golf Region Analysis.

KEY ISSUES

SOCIETAL TRENDS AND ISSUES IMPACTING GOLF FACILITIES

As society grows and changes, there are shifts in lifestyle behaviours that impact the way Victorians participate in sport and leisure activities. Understanding and addressing these trends through the provision of golf facilities and infrastructure will be critical to growing the game and engaging with new markets.

	Key Trend or Issue	What does this mean for golf and our facilities?
Increasingly time poor society	Prior to the COVID-19 pandemic, many people's lives were filled with work and social commitments. This drove the trend towards short, quick and fast sport participation products. For many, the pandemic gave back some of this time by eliminating the need to commute to the office and reducing social and sporting commitments on the weekends. Many chose to fill this newfound time by taking up new activities or sports, of which golf was a beneficiary.	Quick, short format participation opportunities will increasingly be sought after. Facilities that are equipped with infrastructure such as **3, 6 and 9 hole loops, short courses, pitch and putt areas, mini golf, driving ranges and simulators** offer participants an opportunity to engage in the sport that doesn't take up large portions of their day.
Highly competitive sport and recreation market	People are looking for more flexible sport and recreation choices that fit around their busy lifestyle. The rise of unstructured recreation activities have provided Australians with more choices for active pursuits than ever before. Additionally, the COVID-19 pandemic reduced access to organised sport, and across Victoria, entire seasons of community sport were cancelled. In the absence of organised sport, Australians searched for alternatives to be physically active – accelerating the trend toward non-organised or social sport.	Facilities that have a diverse offer and a broad range of reasons to visit will have a clear point of difference in a cluttered market. Providing supporting infrastructure such as a **café, fitness/gym area, simulators and mini golf** can enhance the appeal of a golf facility and increase engagement.
Cost of living pressures and perceived cost of golf	The cost of sport in the current financial climate will likely remain a barrier while the impact of the pandemic affects the disposable income of Australian households. The Australian Institute of Family Studies reported Australians are generally reducing their spending rather than increasing debt. The cost of accessing sport is particularly difficult for Australian households currently experiencing financial hardship. Combined with the increasing trend towards free and lower cost outdoor and recreational physical activities, organised sport participation is at risk of becoming a more discretional priority for many Australians.	To keep the cost of golf affordable for all, courses and facilities should consider investing into infrastructure that generates additional revenue to off-set operating costs. This may include the addition of a **driving range, mini golf course, and/or food and beverage offerings**.

SOCIETAL TRENDS AND ISSUES IMPACTING GOLF FACILITIES

	Key Trend or Issue	What does this mean for golf and our facilities?
Reduced interest in joining clubs and participating in organised sport	The trend away from organised sport participation to more recreational activities has accelerated during the pandemic for women and older Australians. While adult men are more likely to increase participation in sports, they tend to preference casual and socially distanced sports such as golf, surfing and cycling. Disruption to junior sport seasons due to COVID lockdowns may have a longer-term impact on retention and ongoing participation in organised sport and recreation activities.	The traditional membership model is becoming less appealing to the future generation of participants. Providing fun, flexible, 'pay for play' and casual participation options will make the sport more appealing to a broader market. This provides opportunities for **clubs to adapt and more public courses, alternative and multi-sport venues to be developed.**
Rapidly changing world of technology	Technology is increasingly playing a more significant role in the way Australians engage in sport and recreation. This was especially evident through the COVID-19 pandemic, when 39% of Australians used digital platforms to exercise during the national lockdown in 2020 and the installation of golf simulators in the home rapidly increased to the point where supply exceeded demand. The use of digital platforms is projected to continue as Australians invest further in wearable fitness tech, at-home fitness equipment, and fitness apps.	The way participants engage with golf is evolving in line with technological advancements. Course and facility operators need to **embrace innovations such as golf simulators, virtual reality and wearable devices** to enhance the playing experience both on and off the course.
Inactive children and youth	With the rise in digital technology, many children are spending their leisure time connected to electronic devices. Increased screen time has been a major issue during the COVID-19 pandemic, with concern that children missing out on sporting experiences during 2020, may lead to a potential generation of young people 'lost' to organised sport. Missing the early introduction with sport or dropping out at an influential age might mean some young Australians do not return to sport or never get to experience the benefits offered by a positive sporting experience.	With competing demands on people's leisure time, golf must now compete with typical entertainment products (such as going to the cinema). Facilities that offer a **community hub environment with a diverse range of playing, entertainment and socialisation options**, will appeal to a broader audience and encourage increased visitation.

KEY GOLF FACILITIES AND INFRASTRUCTURE ISSUES

Protecting and Re-invigorating Public Golf Facilities

Public golf facilities (both golf courses and driving ranges) play a critical role in introducing new participants to the game. Nearly two thirds (65%) of respondents to the Golf Participant Survey had their first golf experience on a public golf course, with an additional 7% having their first experience on a public driving range.

Despite such significant importance in the participation journey, many public golf facilities have been disregarded in community funding decisions and are under-invested in by facility owners. This can result in an unfavourable initial experience with the sport, that can delay or even prevent future participation.

For many years Golf Australia has not had a close connection with most public golf facilities. Typically, participants who utilise public facilities are social or casual golfers and are therefore unlikely to belong to a golf club within the existing membership structure.

As a result, these facilities have been largely overlooked by golf bodies when compared to other parts of the sport. This has been further exacerbated by some Local Government's arms-length relationship with the operation of Council-owned facilities, and has led to many facility operators prioritising profitability over the delivery of community outcomes – although this is starting to change.

As a common pathway entry point, public golf facilities must create an experience which elevates the aspects of the game which motivate potential and casual participants to enhance their engagement with the game.

In addition, an often-overlooked benefit of public golf facilities are the skills, knowledge and specialised expertise in turf management which are developed within the golf industry. These skills can be applied to the maintenance of other assets such as sports fields and parklands which provides a significant uplift in

Source: Golf Australia

Key Infrastructure Investment Priorities

- Diversify offerings at public courses to broaden golf's appeal to the community by creating vibrant and sustainable Community Golf Hubs.
- Establish alternative formats of the game, (such as short courses, driving ranges and simulators) at public courses to provide participation opportunities across various levels of the development pathway.

Land Use Pressure to Retain Public Owned Golf Courses

Access to green open space is a premium, particularly in the inner-city suburbs of Melbourne, where some LGAs are facing increased pressure from the community to open public golf courses to be used as parkland.

This becomes more and more of an issue as the number of dwellings bordering golf courses increase, which can lead to safety issues from stray balls. Almost one-in-three courses in Victoria have an internal (safety) or external (neighbour) boundary issue which requires attention. To address these issues, Councils often erect large safety nets and fences to segregate golfers from non-golfers, but this tends to perpetuate the perception that golf courses are exclusive and not accessible to the public.

Never was this more evident than during Melbourne's extended COVID-19 lockdowns. During this time the importance of access to local parks for the health and wellbeing of the community – both, mental and physical – was emphasised. As golf was a banned activity, many local residents rediscovered their local golf course as a new open space or parkland to explore and utilise.

This has led to increased pressure on some LGAs to close down public golf courses and return them to the community as open space which occurred at the now closed Elsternwick Public Golf Course. Some LGA representatives even questioned the provision of golf courses, and whether there is a surplus – particularly in certain parts of metropolitan Melbourne and some regional centres.

Anecdotally, many LGA representatives understand the broader benefits that golf courses provide, but they lack the information and tools to communicate these benefits internally and influence other staff, Councillors, and community groups – particularly when there are so many competing demands for open space.


Source: Change.Org

Some [Councils] are reluctant to continue to invest in public golf facilities as golf courses are perceived to serve a very small part of the community which are not necessarily local residents." – Council Representative

Key Infrastructure Investment Priorities

- Improve informative, directional and wayfinding signage at golf facilities to educate players and residents about safety considerations, and access times for different user groups.
- Consider the installation of perimeter walking paths and additional recreation infrastructure around the course to enable greater utilisation by the local community.
- Diversify offerings at public courses including investigating multi-sport facility opportunities to create vibrant Community Hubs.
- Investigate opportunities to gain funding to invest in biodiversity, flood mitigation, urban fauna and flora refuges.

Ageing, Tired and Outdated Facilities and Infrastructure

While some member clubs have substantial, modern and sometimes extravagant clubhouses, it is a vastly different story for many public and regional courses.

Clubhouses or amenity buildings at many of these facilities were generally built in the 1960's and 1970's. Golf Australia's Facility Audit identified 73% of Victoria's golf clubhouses were built over 30-years ago resulting in 38% of facilities being assessed as in "Very Poor", "Poor" or "Moderate" condition.

This issue isn't just confined to the clubhouse and amenities buildings. Many maintenance and storage facilities are also tired and outdated, with 69% being constructed over 20 years ago and nearly one-in-five (18%) being in a "Very Poor", "Poor" or "Unusable" condition.

It is clear, that many buildings are outdated and have seen very little modification to update them to contemporary expectations of participants (and the broader community). For example, two in every five facilities (40%) do not have a female change room and over half (51%) do not have accessible carparking or lack appropriate accessibility access to the clubhouse (12%).

Issues with accessibility do not stop with the clubhouse. Many golf participants are ageing and for some, the use of a golf cart will be necessary to enable them to continue playing. However, there is a lack of storage for golf carts at many facilities to meet the demand – not only from ageing participants but also time poor participants who want to speed up the pace of play to fit in with their busy schedules.

This increased demand for golf carts will also require additional investment into cart paths to ensure participants can move freely around the course, without causing damage to paths and fairways.

Key Infrastructure Investment Priorities

- Upgrade existing clubhouse infrastructure to meet contemporary design standards and expectations of the community.
- Install cart paths and storage to support increasing demand in golf cart usage.
- Ensure golf clubhouses and amenity buildings are designed to be more welcoming and inclusive of the whole community and consider universal design principles.

Source: Golf Australia

KEY GOLF FACILITIES AND INFRASTRUCTURE ISSUES

Lack of Diverse Product and Service Offering at Golf Courses

One of the many unique aspects of golf is the diversity, accessibility and flexibility of participation opportunities.

While the traditional image of golf generally involves carrying a bag of golf clubs around an immaculately presented course for 9 or 18-holes, there are many alternative participation options to the traditional 'green-grass' version of the game. All golf is golf and it is important to recognise and incorporate different formats of the game into golf facilities to ensure they appeal to a broad audience.

Golf has the potential to appeal to many, if not every segment of the community and yet the provision of golf offerings across Victoria is largely homogenous. Nearly 85% of golf facilities in Victoria only provide traditional 'green-grass' golf.

Research commissioned by the AGIC in 2021, showed the majority (52%) of people who identified as having played golf in the last 12-months, did so at an alternative or non-green grass golf facility. While some traditionalists may argue that these formats aren't 'real golf', it demonstrates that the next generation of golfers may not enter the game using the same pathway as those who currently play.

Alternative participation options such as mini golf, driving ranges, short courses and golf simulators provide opportunities to engage with new and different markets of which the traditional, green-grass formats do not yet resonate. These options also tend to be cheaper, quicker and are not associated with some of the negative perceptions which traditional green grass formats carry.

"I don't know if there is another sport which has as many different ways to engage, and yet golf facilities seem to have a one-dimensional offer."

– Golf Stakeholder

Furthermore, there is also an opportunity to leverage the natural environment where many golf courses are situated. While hospitality is often a big focus for many member clubs, the food and beverage offer at many public facilities is often minimal or overlooked all together.

Ringwood Golf Course is a great example of how a quality food and beverage offer can attract golfers and non-golfers alike to the facility. The Mister Fox Café offers a well-crafted food selection, including an extensive breakfast menu and daily specials, great coffee and a selection of boutique beers and wines.

Key Infrastructure Investment Priorities

Increase the provision of family friendly infrastructure such as children's playgrounds, mini golf and contemporary food and beverage offers.

Source: Wembley Golf

KEY GOLF FACILITIES AND INFRASTRUCTURE ISSUES

Perceived Oversupply of Golf Courses

Victoria has more golf courses per capita than any other state in Australia, with one golf course for every 19,300 residents. The provision of golf courses in metropolitan Melbourne (1 course to 47,600 residents) and regional Victoria (1 course to 6,600 residents) are well above the national average. However, this does not imply that there is an oversupply of courses in Victoria.

The land and micro-climate conditions required to create a high-quality course do not exist everywhere. In fact, some areas are not suitable for golf courses at all due to location, topography, soil type, climate and weather conditions. On the other hand, areas like Melbourne's Sandbelt provide optimal conditions for world-class courses. Over time, this ideal environment has led to a high concentration of courses in areas with optimal conditions, and is one of the reasons Victoria boasts some of the best golf courses in the world.

"Victoria is blessed to have the quality of its courses that we do. We must be one of the top five or six golf destinations in the world."

– Golf Stakeholder

The density of courses in certain areas can sometimes lead to a perception that there are too many golf courses. This can erroneously lead some to conclude that the removal of one course will not impact golf participation rates in a certain region. When Local Government assess the future viability of a golf course, it is important to consider the overall golf offer within a region. Accessibility to a broad range of facilities is important, particularly for non-member players and beginners.

As Victoria's grows, the game must continue to ensure the public have access to all formats of the game, within a reasonable travel time. While a facility may be underutilised now, a growing population and an increased effort to engage new markets will provide the opportunity for public golf facilities and member courses to become thriving hubs for the whole community.

Source: Albert Park Golf

Key Infrastructure Investment Priorities

- Increase engagement with all levels of government to communicate the community benefits that golf clubs, courses and facilities provide.
- Elevate the strength of Victoria's golf courses and the flow on economic benefits to tourism and visitation.
- Encourage more diverse activities within golf facilities by supporting the construction or enhancement of driving ranges, mini golf, short courses, playgrounds and food and beverage offerings at golf facilities.

GolfAustralia

Female Friendly Facilities

With golf being traditionally male dominated over the years, the design and provision of course infrastructure has ultimately reflected such trends. Examples of this include a lack of on-course toilet facilities and the inadequate provision of appropriate changeroom facilities for women within many older clubhouses. This is evidenced in the Golf Facility Audit which identified that two in every five facilities do not meet female friendly design standards.

This is also reflective on the course, where many course layouts have been designed and set up with long drive shots in mind. This can disadvantage some women, as well as beginners to the game, and result in an unenjoyable initial golfing experience. A simple way to address this is by having multiple tee positions to suit a variety of skill and experience levels.

Additionally, for many women (and men) new to the game, there is a level of assumed knowledge that is required to navigate a facility for the first time. For example, this may include understanding what a Pro Shop is and why to visit it before you start a round, as well as how to get to the first tee, and move from hole to hole. While some of this may be second nature to those who have grown up around the game, for new participants, the lack of clear wayfinding signage and signed amenities can impact on their first experience of the game.

> *"Right from the front gate there is a level of assumed knowledge which can make golf facilities scary and intimidating places, particularly for the beginner."*
>
> *– Female Golf Participant*

Many golf facilities (particularly public and regional facilities) are becoming outdated and do not provide the range of amenities conducive to participation by women and girls. To encourage more women and girls to become active and involved in golf, a greater focus on female-friendly facilities is required.

Family Friendly Facilities

As well as the need for more female friendly golf facilities, there is also a need for facilities that appeal to kids and families. Many golf facilities provide very little entertainment or engagement for children. This makes them unwelcoming spaces for families to attend and play golf, as well as non-golfing activities.

Wembley Golf Course in Western Australia is a great example of how making a facility more family friendly can not only generate additional revenue for the facility, but also create greater utilisation of the facility. As part of the redevelopment of the facility, Council invested in the construction of an 18-hole mini golf course and children's playground to make the facility more family friendly. Coupled with an improved café and restaurant offering, the facility is now busy with almost as many non-golfers as golfers, particularly young families and mothers groups who appreciate having a location that caters for both parents and children and exposes them to the variety of ways they can engage with golf.

Key Infrastructure Investment Priorities

- Provide "forward tees" on courses to create a more accessible and enjoyable starting point for beginners.
- Ensure that female friendly changerooms and amenities are provided at all clubs and facilities.
- Break down the barriers of assumed knowledge through improved wayfinding signage at golf facilities.
- Address the lack of provision of on course toilets through investing in infrastructure and provisioning of water and sewerage services across the course.
- Increase the provision of family friendly infrastructure such as children's playgrounds, mini golf and suitable food and beverage offers.

KEY GOLF FACILITIES AND INFRASTRUCTURE ISSUES

Clubs and Facilities Operating Under Financial Duress

As the operating costs associated with a golf course increase, many club stakeholders are concerned with the ongoing financial sustainability of their club. Data from Golf Australia's club health assessments shows that 12% of clubs in Victoria are experiencing financial duress and an additional 29% are at risk of financial duress.

Some of the key operational costs impacting financial sustainability include:

- Ageing maintenance machinery requiring constant repair or replacement.
- Water associated costs such as irrigation systems, water storage solutions and drainage infrastructure.
- Limited opportunities to generate revenue outside of traditional membership subscriptions and green fees.
- Inefficient clubhouse layouts resulting in increased staffing costs.
- Increasing electricity costs associated with lighting and operating a clubhouse, as well as plant and machinery.

While solar energy is a solution to electricity costs – a solar panel system requires a significant upfront capital outlay to fund the installation of panels.

Adding to this, the payback period of solar systems can be well over five years, making it a difficult investment decision for some cash strapped clubs. Providing clubs and facility operators with access to, and awareness of, State and Federal grant sources would assist in future planning, and enhance the long-term sustainability of many clubs and facilities.

In addition, many clubs and facilities are not able to generate the funds required to fully invest in large scale facility and infrastructure improvements and therefore rely heavily on grants and funding. However, exclusions to grant programs and the priorities of Local Government being directed toward other sport facilities often prevent golf clubs from receiving the funds they require.

Key Infrastructure Investment Priorities

Assist clubs and facilities to explore and apply for funding to purchase maintenance machinery which is fit for purpose.

Improve the financial sustainability of golf clubs and facilities through investment into renewable energy sources (e.g. solar) and energy efficient lighting and facility design.

Increase onsite water storage and invest into the renewal of irrigation systems to ensure water is used efficiently and effectively.

Source: Mona Vale Golf Club

KEY GOLF PARTICIPATION GROWTH OPPORTUNITIES

AUSTRALIAN GOLF LANDSCAPE RESEARCH

The Australian Golf Landscape Research commissioned by the Australian Golf Industry Council in 2021 identified the following segments as key growth opportunities for the game: **Not Engaged Yet, Alternative Players and Ball Hitters.** These segments equate to a total market size in Victoria of just over **2 million people**.

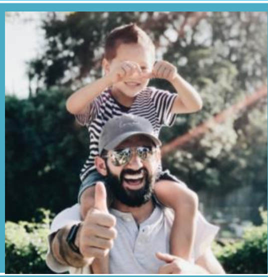
The market size in Victoria has been calculated by adjusting the national research based on the key sources of AusPlay and the 2021/22 Golf Club Participation Report.

In order to capitalise on this significant growth opportunity, it is critical that Golf's 'places to play' understand and are able to meet the needs of these customers through being **modern, innovative, fun and inclusive environments** that engage these markets and transition them along the golfing pathway.

VICTORIAN GOLF PARTICIPANT SEGMENTS

Total Market Size: 2.3 million Victorians

Greatest Growth Opportunity

				
1,500,000 **Not engaged yet**	425,000 **Alternative Players**	76,000 **Ball Hitters**	213,590 **Round Players**	108,027 **Members**
Have not done any golf activity in the last year but are interested in doing so	Have been to an alternative form* in the last year but not other activities	Have been to a driving range but not played a round in the last year	Have played a round of golf in the last year but not a member	Currently a member of a golf club
	Both have held a golf club or have stepped onto a golf course in the last 12 months		Both have stepped onto a golf course in the last 12 months	

* Alternative forms includes Top Golf, Holey Moley, Mini Golf/Putt old's, Indoor, Big Hole Golf, Speed Golf, FootGolf, Disc Golf.

Not Yet Engaged Segment

Who are they?

There are 1.5 million Victorians who have not engaged in any form of golf activity in the last year but are interested in doing so. Women and children are a key sub-groups within this market segment, which represents the greatest growth opportunity.

This segment also includes a broad range of community groups which are typically underrepresented in society, such as culturally and linguistically diverse communities and first nations people.

Providing the right product, facilities and value proposition for this segment will be a high priority for the golf industry moving forward.

What do they want?

The main interest for this segment lies in alternative forms of golf – such as mini golf and virtual golf. Given they have had little experience in the sport, focusing on fun and enjoyment is critical to ensure a return visit. Affordability is also another consideration, given the cluttered sports market and vast number of competing activities for family time.

How do we engage them?

The key to engaging with this segment is understanding that, to them, golf is seen as an entertainment product rather than a sporting activity. As such it needs to be able to compete with the fun and enjoyment offered by competing entertainment products (e.g. cinema).

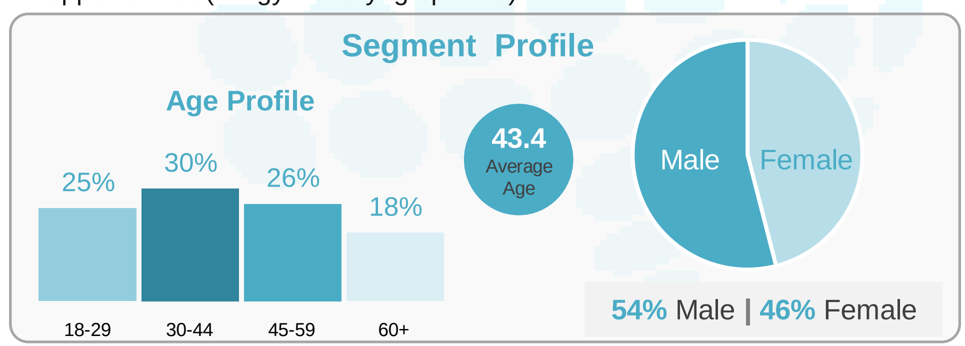
Communicating the breadth of ways they can engage in golf is key to overcoming some of the perceived barriers to participation. This means working with club and facility managers to ensure they understand the importance of investing in infrastructure upgrades that provide a diverse product mix.

For women and young children, providing multiple reasons to visit a golf facility along with casual participation options can assist in breaking down perceived barriers associated with the game and increase awareness of alternate participation options.

Source: Shutterstock

Key Insights

- To attract the **Not Yet Engaged** segment, club and facility operators should consider investing in facility elements outside of traditional 'green grass' golf to enhance the overall appeal of the facility.
- This includes mini golf, high quality food and beverage offers (including good coffee), children's playgrounds, family fun activities, and fitness opportunities (i.e. gym and yoga/pilates).



Alternative Players Segment

Who are they?

Similar to Ball Hitters, Alternative Players are driven by the fun, enjoyment and social elements of golf. There are many alternative formats of golf including Mini Golf, Pitch and Putt, and FootGolf. These shorter and modified versions of the game are generally characterised by a quicker speed of play and more casual participation options – which makes them more appealing to youth – particularly women and girls.

What do they want?

Affordability, flexibility, and good accessibility/location are key to engaging Alternative Players. As fun, enjoyment and socialising are key drivers, providing an environment that facilitates this is critical. This may include providing non-golf activities and infrastructure which complement the golfing experience.

How do we engage them?

In recent years, mini golf has undergone a resurgence through the revitalisation of some larger golf complexes. Examples include Wembley (WA), Curlewis (VIC), Yarra Bend (VIC) and Victoria Park (QLD). As a standalone product, Australian business Holey Moley has had great success in Brisbane, Sydney and Melbourne operating as part mini golf, part cocktail lounge.

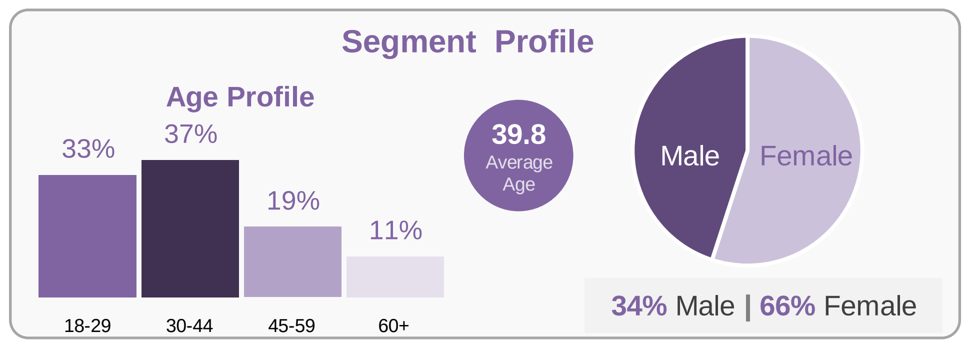
Pitch and Putt can also remove some of the intimidation associated with playing a full-length golf course. Re-purposing existing holes or creating new areas for Pitch and Putt golf provides an alternate participation option that can open golf facilities up to a broader audience.

FootGolf is a hybrid sport combining football (soccer) and golf and has been very popular at the golf courses that offer it. The format offers an opportunity for people in one of the fastest growing and largest participation sports in Australia to experience a golf course for the first time and potentially transition into the golfing pathway.

Source: Holey Moley

Key Insights

- Mini golf courses, short courses and simulators are key facilities for attracting **Alternative Players**.
- Club and facility operators should focus on creating a fun and social environment that encourages participants to 'come and try' the sport. This may also include the provision of food and beverage elements and other entertainment offers.



AUSTRALIAN GOLF MARKET GROWTH OPPORTUNITIES

Ball Hitters Segment

Who are they?

Ball Hitters are defined as participants who have been to a driving range but not played a round of golf in the last 12 months. There are over 76,000 “Ball Hitters” in Victoria, which makes up approximately 9% of total golf participants.

What do they want?

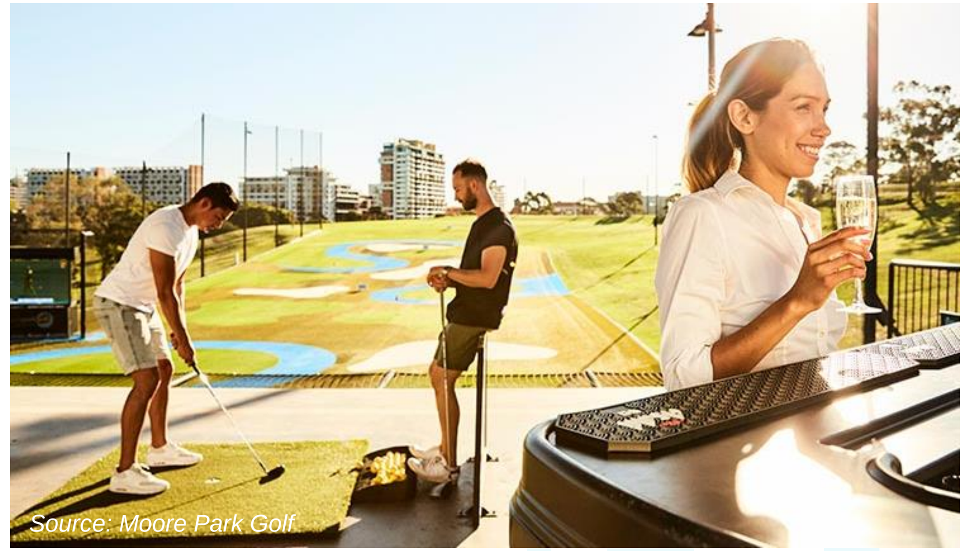
While many Ball Hitters are motivated by a desire to improve their swing to be able to transition to the golf course, some also enjoy just hitting a ball. Being able to improve their driving range or simulator experience through technology and gamification is also important to keeping them engaged and connected with the game.

Although fun and enjoyment is a top driver for all market segments, the ability to connect with family and friends is a key secondary motivator for Ball Hitters. Creating environments within golf clubs and facilities that encourage social connection and enjoyment is critical to engaging with these markets.

How do we engage them?

Driving Ranges not only provide a facility for current participants to hone their skills and warm up before a round, but are also an entertainment destination for golfers and non-golfers alike. This can assist in engaging a broader market than a traditional golf course.

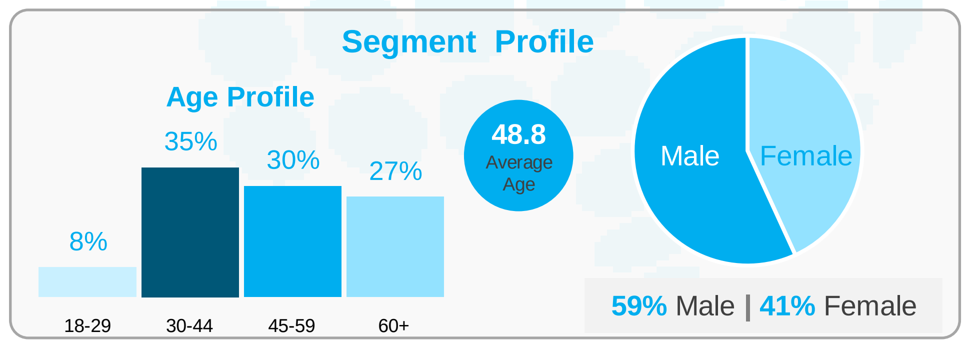
Similarly, while golf simulators were initially introduced as a teaching tool, virtual golf experiences can cater to all market segments. This technology makes it possible for a golfer to play any course in the world, or to play at any skill level they desire, from the comfort of their simulator bay.



Source: Moore Park Golf

Key Insights

- Enhancing the experience within driving ranges through the provision of ball tracking technology, automatic tees, televisions, a food and beverage service and live entertainment will encourage increased engagement and visitation from **Ball Hitters**.



Members and Round Players

Who are they?

Members and Round Players are the ‘traditional’ golf market, and have stepped onto a golf course in the last 12 months. These participants are either a member of a golf club, or have played a round of golf in the last year.

What do they want?

Fun, enjoyment and socialising is a key motivator for Members and Round Players, who love how golf improves their overall physical and metal health and provides them with a challenge. While having a positive experience on the course is important to them, it is equally important to have somewhere to eat and drink after the round with their friends.

The type of facility that Members and Round Players typically visit are the more traditional 9- or 18-hole golf course. However, this segment is also interested in improving their game and so access to driving ranges and golf simulators (accompanied by appropriate coaching/teaching facilities) is also important to them.

Additionally, short course formats such as Pitch and Putt and Par-3 Courses may also provide ways for time-poor Round Players to have greater engagement with the game.

How do we engage them?

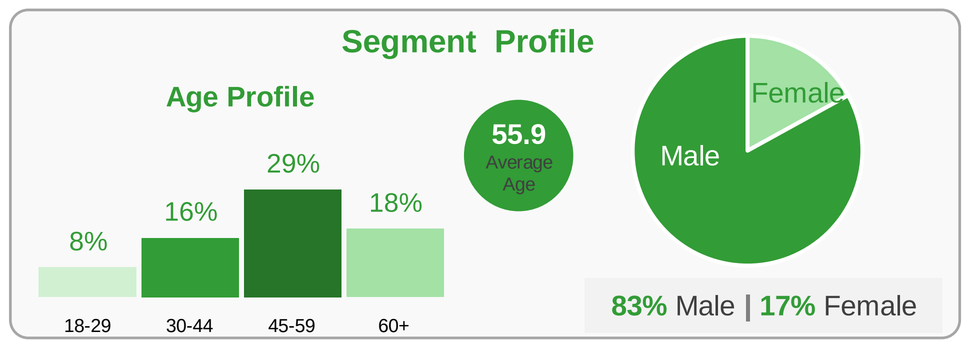
While friends and partners were identified as key triggers for getting into golf for both members and round players, these segments are less likely to encourage their own friends and family to play. This is due to the perception of the game as difficult, expensive and time consuming.

Creating facilities that have a diverse product and service offering (including mini golf, virtual golf and food and beverage) can enable Members and Round Players to bring the whole family along to ‘come and try’ one of the many different formats of golf or simply enjoy the food and beverage offer in an idyllic natural environment.

Source: Golf Australia

Key Insights

- While **Members and Round Players** already have a strong affinity to golf, they are a key market segment for introducing new players to the game. Encouraging these participants to invite their family and friends to try golf will be critical to engaging with new market segments.



KEY GOLF FACILITIES AND INFRASTRUCTURE OPPORTUNITIES

COMMUNITY GOLF HUBS

Create more Community Golf Hubs across Victoria to provide a diverse range of golf and non-golf offerings which increase facility utilisation, and expose a broader segment of the community to the game.

What is a Community Golf Hub?

A Community Golf Hub is the home of golf within a broader region. All participants are welcome - no matter their skill level, participation preference or level of interest in playing the game. A Community Golf Hub provides a full golf experience for beginners through to seasoned golfers, as well as non-golfing activities to local residents and the broader community. A Community Golf Hub should include the following infrastructure:

- 9- or 18- hole golf course (preferably with three and/or six hole loops for shorter rounds).
- Driving range (with teaching facilities).
- Mini golf course.
- Teaching and practice areas (putting greens and short game).
- Golf service centre.
- High quality food and beverage offer (café and/or restaurant).
- Children's playground.

A community golf hub may be further enhanced through the inclusion of additional elements such as:

- Golf simulator.
- Short course (or forward tees on main course).
- Alternative formats such as FootGolf.
- Gym and activity space/studio for activities such a yoga and pilates.
- Complementary sports such as tennis and bowls.
- Community meeting rooms and function spaces.

Why Invest in a Community Golf Hub?

Community golf hubs can be vibrant, fun and valued destinations for the whole community. While 'traditional golf' will always be the core business of a Community Golf Hub, these facilities provide a diverse range of additional revenue streams by leveraging other activities and services to increase secondary spend. This results in these type of facilities providing a greater return on investment compared to a traditional 'green grass' only facility.

Australia's leading example of this type of facility is Wembley Golf Course in WA, that returned approximately $1.8m to the Town of Cambridge in 2020.

Source: Town of Cambridge

CASE STUDY – COMMUNITY GOLF HUB, WEMBLEY GOLF, WA

- The Town of Cambridge in Western Australia is home to Wembley Golf, widely renowned as one of the busiest and most activated golf facilities in Australia.
- Opened in 1932, it is also one of Perth's oldest public golf courses, however since that time the facility has seen significant investment to expand and develop the services on offer.
- Over a 14-year period, the Town of Cambridge invested over $30 million into the facility, with the vision to create “**an active community hub**” that would appeal to broad demographic – including non-golfers.
- The most recent developments in 2016 saw the introduction of an 18-hole mini golf course, a new restaurant and function facility, and a children’s playground.
- Wembley Golf now generates significant revenue for Council, and contributes approximately $1.7 million back to Council’s bottom line.
- Both the mini golf and playground developments have brought a new and varied customer base to the facility. On a busy day the mini golf does approximately 700 rounds, and mini golf patrons have a significantly higher F&B spend than traditional golfers. Around $700,000 of operating profit is from mini golf alone.
- The driving range sees about 80,000 balls hit on a busy day, with an average revenue of 17c per ball – $13,600 of revenue for each busy day.
- The playground has also been a driver of non-golfer visits (this is the only element of the re-development which Council did not insist on a business case). Approximately 80% of patrons who use the café are locals or non-golfers.

Key Insights

- Offering a diverse range of golfing experiences, family fun activities and a high-quality food and beverage offer has established Wembley as more than a golf facility – and has seen it become a valued and active community hub.

Promote the benefits of developing a mini golf course, to encourage increased provision and improve engagement with kids, women and families.

Why Build Mini Golf Courses?

Mini Golf is experiencing a resurgence in the golf facility market within Australia with a number of public golf facilities and clubs either recently constructing or in the process of planning a new mini golf course.

Some mini golf courses are also being designed to appeal to experienced golfers by being built to resemble a real golf course, inclusive of bunker like hazards and dynamic course shaping.

Benefits of a mini golf facility are:

- Flexibility to be constructed in a variety of sizes and styles.
- Can be integrated into existing golf facilities, greenfield sites and non-golf facilities.
- Diversifies the revenue stream of existing golf facilities through new visitation.
- Creates opportunities to generate increased customer sales of existing facility offerings such as golf course rounds, driving range usage and food & beverage.
- Complements an existing golf facility's activities and creates a participation pathway.
- Extends the existing golf facility catchment demographic to include non-golfers, children, families and women.
- Relatively simple to construct with low costs to maintain and manage.

Although some in the golf industry regard mini golf as an 'introductory' golf product, the reality is that most participants see mini golf as an entertainment product. As such, the offer and value proposition needs to compete with other entertainment options available in the market.

Why Invest in Mini Golf?

Mini Golf can be a valuable investment to a facility with most mini golf courses providing a 20% return on investment (under 5-year pay back period).

In addition to generating revenue through 'green fees', the entertainment perception of mini golf by participants also results in higher secondary spend at facilities when mini golf is combined with a complementary food and beverage offer (to suit the target demographic).

While the format can develop some of the fundamental putting skills required to progress to 'green grass golf', it can be better used as a 'gateway product' to introduce participants, and their families to golf facilities – exposing them to the range of additional opportunities to engage with the game.


Source: Town of Cambridge

CASE STUDY – MINI GOLF, THE LINKS SHELL COVE, NSW

- In May 2021, Shellharbour City Council opened the first SHANX mini golf facility in the Southern Hemisphere in Shell Cove NSW.
- This newly developed concept of creating miniature golf courses, as opposed to traditional mini golf to attract golfers of all ages and abilities, has been incredibly popular since opening in the region.
- Ancillary spend is close to $2 for every $1 spent on mini golf in the facility.
- Adult ticket sales are significantly high, with a main demographic of 25-40 year old's playing on weekends and at nights. SHANX @ Links Shell Cove is now becoming well-known as a great first date spot in Illawarra.
- In the first four weeks of opening, the facility hosted 2,500 rounds, demonstrating they are well on track for 30,000 rounds in their first year.
- Demand for children's parties is particularly high, as well as interest in corporate gatherings – with over a dozen bookings for corporate, adult team based, events taken in a three-month period.
- The mini golf format provides a fun, inclusive environment available to all whilst being located within a community-focused setting.


Source: SHANX Mini Golf

Key Insights

- The mini golf courses of the future are professionally-designed, scaled-down versions of a full-size golf course, offering the opportunity to introduce a new generation of golfers to the game.
- Mini golf also offers a strong financial incentive, with most mini golf courses providing a 20% return on investment (under 5-year pay back period).

Enhance driving ranges to appeal to beginner golfers, increase engagement with a younger demographic, and strengthen the overall entertainment offering within traditional golf facilities.

Why Build and Enhance Driving Ranges?

Driving Ranges do not just provide a facility for current participants to hone their skills and warm up before a round – the Golf Participant Survey identified that 7% of current participants had their first experience at a public driving range. Research commissioned by the AGIC in 2021 identified there are over 76,000 “Ball Hitters” in Victoria – making up approximately 9% of total golf participants.

These ‘Ball Hitters’ don’t see their golf participation as sport but rather a form of recreation – somewhere they can release the stressors of life either by themselves or with a group of friends.

The Future of Driving Ranges isn’t just Hitting Balls

Similar to mini golf, driving ranges are viewed by many participants as an entertainment product, and therefore the overall experience needs to compete with other entertainment options available in the market.

In America, Topgolf is transforming the traditional driving range into a golf entertainment venue. Participants use golf balls embedded with personalised microchips to hit shots towards 11-target areas at varying distances. Within each target area is a reader that computes a score based on the accuracy and distance of the shot. In addition to the driving range experience, Topgolf facilities have pool tables, TVs, a food and beverage service and live entertainment.

In Victoria, The Range @ Curlewis has an onsite food and beverage outlet which is accessible from the range itself. This allows participants to grab a burger and a drink while hitting a few balls with friends. The Range is also equipped with Top Tracer ball tracking technology which allows for the gamification of the driving range experience and encourages friendly competition between friends.

Technology is the Key

While many clubs and facilities have a practice fairway for players to warm up, what sets a driving range apart from a practice fairway is the inclusion of technology which enhances the player’s experience.

Ball tracking technology is now a common addition to many driving ranges that allows the player to receive instant feedback about key aspects of their swing and how it impacts the flight of the ball. This technology also allows driving ranges to be built on smaller parcels of land, as the participant no longer needs to see the ball land to know how far it has travelled.

An automatic ball delivery system is another technological innovation that improves the participant experience and increases overall spend. This system provides a contactless supply of balls which are automatically teed up. This provides a positive customer experience, by enabling participants to maintain their stance between shots, and increase the number of balls hit. In turn, this allows for a greater utilisation of each bay during peak periods and leads to

Source: Golf Central Brisbane Airport

CASE STUDY – DRIVING RANGE, THE RANGE @ CURLEWIS, VICTORIA

- Regarded as the emerald of Victoria's Bellarine Peninsula area initiatives, The Range @ Curlewis has become one of the most activated golf facilities in Victoria.
- Purchased by a local entrepreneur in 2015, they immediately commenced a transformation process to produce a thriving, energetic and popular facility for both locals and visitors.
- It is quickly becoming known as one of Australia's best fully undercover driving range and mini golf facilities. It features 18 bays with automatic tees, ES15 flight trackers, X-Golf simulators, a fully licensed cafe and a 200-person function room.
- The next addition included a well-designed mini golf course, complemented by virtual golf ranges.
- These improvements in addition to significant course investment has seen Curlewis move into the top 100 Australian courses for the first time.
- The experience for new visitors to the club has been made easy with three tailored coaching packages to help the transition to course play, without any obligation of becoming a member afterwards.

Source: Curlewis Golf Club

Key Insights

- In under two years the facility was able to redefine itself through significant upgrades and branding, showing the process of transforming a club doesn't have to be lengthy.
- Promoting the message of local ownership helps create a sense of pride within the region, with residents are able to identify the facility as a truly local asset.

GOLF SIMULATORS

Increase accessibility to golf through the provision of golf simulators, which offer the opportunity to play golf anywhere, at anytime, and for any skill level.

What is a Golf Simulator?

Golf simulators provide fun, fast and realistic indoor golf experiences which can be enjoyed anytime, regardless of weather conditions. Golf simulators have a ball launch tracker which captures all the necessary ball flight data and projects it onto a large screen display.

This data can also be provided back to the participant so they can measure every aspect of the golf swing – including the launch angle, ball speed, clubhead speed, club path, club face orientation at impact, ball direction, spin rate and spin angle. This can become a valuable teaching tool to improve technique and overall development.

Some golf simulators such as X-Golf, go to the extreme of having a unique, patented moving floor plate. The floor plate adjusts to mimic the lie on the golf course, so the player does not hit off a flat lie with each shot – it can be an uphill, downhill or sidehill lie angle of up to 35 degrees.

This technology makes it possible for a golfer to play any course in the world, from the comfort of their simulator bay.

Why Invest in a Golf Simulator?

While initially developed and marketed as a teaching tool, golf simulators and virtual golf experiences are attracting the 18-34 age demographic to the game. The automatic ball return (where there is no need for the player to move after a shot, as the ball 'pops' out of the floor), enables a single person to play 18 holes in as little as 40-minutes quite comfortably.

Similar to the way Topgolf has revolutionised the driving range experience in America, golf simulators are doing the same in Australia with many facilities running weekly competitions combined with other social and group activities.

Source: Trackman

CASE STUDY – GOLF SIMULATOR, GOLFSTUDIO – MORDIALLOC, VICTORIA

- Golfstudio is known for providing participants with the ultimate indoor golf experience where everyone can enhance their game and improve their performance. The innovative facility was created on the basis of recognising the importance of a repeatable technique.
- At over 1,700m2, Golfstudio is the largest indoor golf centre in Australia and is accessible 24 hours a day, 7 days a week (membership dependent).
- The facility has a flexible offering that is designed to appeal to all levels of golfers. This includes a driving range, a stretching area, simulators, and a short course (all indoors).
- Golfstudio's state of the art indoor experiences offer accuracy and realism. This includes three types of synthetic grasses (fairway, first cut and second cut), an indoor bunker complete with Melbourne Sandbelt sand, as well as a range of tech systems including CAPTO and Trackman for real-time golfing analysis.
- A truly tailored service is provided to all golfers including coaching and custom fittings.
- There are two qualified PGA Golf Professionals on site that offer coaching sessions.
- In addition to golf, Golfstudio also caters for the pilates community, with a pilates class running every Thursday.

Key Insights

- Using high-quality analytical technology, indoor golf facilities and simulators can assist golfers to develop their skills and technique.
- With virtual driving ranges, putting zones, indoor bunkers, and PGA coaching, these facilities are replicating the on-course experience in a fully indoor venue.

Source: Golf Studio

SHORT COURSES

Recognise the importance of short courses within the golfing journey.

What is a Short Course?

The term ‘short course’ includes ‘Par-3’ course (which as the name suggests is a course where all holes are a par-3) and ‘Pitch and Putt’ courses where each hole is designed to be played with only two clubs. However, short courses can also include more traditional style courses with forward tees that reduce the length and par of the hole.

Short courses are becoming popular in America where some facilities are converting parts of a full-length course into a short course to allow for twilight play after work.

What Advantages Does a Short Course Provide?

For many in the ‘Not Yet Engaged’ segment – as well as some ‘Ball Hitters’ – one of the biggest barriers preventing them from taking up the game can be the difficulty of the game when transitioning to playing on a golf course and the perception that golf takes too long to play.

In today’s increasingly time poor society, demand for time has never been greater and finding four hours to play a traditional 18-hole golf course is only practical for a select few. Short courses can address this barrier, by providing a fun, enjoyable and challenging format that can be completed in a much shorter timeframe. This type of course also provides a participation option for many ‘Round Players’ who often don’t have the time to play as much as they would like to.

The shorter distances of each hole also allows ageing golfers (who may struggle to play a full round of traditional golf), to access a more manageable layout that keeps them involved in the sport for longer.

Additionally, the modified format and smaller parcel of land required for a short course allows greater scope to course designers to ‘challenge’ conventions and build courses that don’t conform to the ‘norms’ of traditional golf course design. Course layouts can focus on delivering a fun and enjoyable experience for players – they don’t even have to be 9- or 18-holes!

Why Invest in a Short Course?

Short courses are designed for all participants, no matter their ability or experience level. They provide a fun way for players of all levels to experience the game.

They provide the ideal environment for transitioning new golfers from the driving range to the golf course, providing the on-course golf experience without the need for long drives and tee shots.

Short courses also encourage experienced golfers to think differently about their shot selection, experiment and carry just two or three clubs.

Source: City of Greater Geelong

CASE STUDY – SHORT COURSE, LAKE CLAREMONT, WA

- In 2009, the full length 9-hole Lake Claremont Golf Course was seeing low utilisation and increasing operating costs.
- As a Council-owned facility, the Town of Claremont was facing a decision about whether to retain the full-length 9-hole course, or to re-purpose the land for another use.
- At a Council referendum, the community made it clear they wanted a golf course to remain open at the site, and as a minimum they wanted at least a Par 3 layout to be retained.
- In 2017 the course was redesigned by world class golfer Terry Gale.
- The course comprises of 9 Holes, which are all Par 3's and range in distance from 87 metres to 137 metres.
- The course was re-designed with the intention of providing something for everyone – from the complete novice, through to the skilled golfer.
- The new facility re-opened in October 2017, and the on-site amenities include a practice putting green, practice chipping area, clubhouse and the TeeBox Cafe.

Source: Lake Claremont Golf

Key Insight

- A Par 3 golf course offers a much lower level of intensity and can act as a 'stepping stone' towards a full-length course. In most cases, it can be played in less than an hour, making it less time consuming than the traditional format, and more appealing to kids, young adults, women and families.
- A 9-hole par 3 golf course will require a relatively small piece of land to build, but the percentage return can be far greater than what a full-length course would generate.

Consider alternative formats of the game to engage with a new market of participants.

What is FootGolf?

FootGolf is a hybrid sport combining the power of football (soccer) with the skill and finesse of golf. Participants use a standard soccer ball and their feet to kick the ball into the ‘cup’ in as few shots as possible.

The format provides an opportunity to increase course utilisation in off-peak times and attract a market that may not consider playing traditional formats of golf. It also provides participants with the opportunity to get onto a golf course in a highly accessible and approachable activity. FootGolf is very appealing to a younger demographic, with approximately 93% of FootGolf participants aged under 44.

How Can FootGolf be Integrated into a Traditional Course?

FootGolf ‘greens’ are generally located away from ‘busy’ areas of the course so as not to interfere with traditional golf play. To avoid disruption to members and green-fee golfers, many facilities will close nine holes during off-peak times for FootGolf, leaving the remaining 9-holes open for those wanting to play the traditional format.

While FootGolf does require the installation of oversized ‘cups’ or holes, new products such as GoalHole enables FootGolf ‘holes’ to be placed anywhere on the course. This allows for course designs to be altered and any ‘wear and tear’ to be spread over other parts of the course.

Why Include FootGolf?

FootGolf has been very popular at many of the facilities in which it is currently offered and provides an additional revenue source to support course operations and potentially engage a whole new market to golf. It requires a relatively low upfront investment, which FootGolf Australia estimates takes most courses approximately six months to recover.

Source: FootGolf Australia

Source: Goal Hole

CASE STUDY – FOOTGOLF, JAMBEROO GOLF CLUB, NSW

- In 2015, the Jamberoo Golf Club (JGC) in NSW embarked on a process to revitalise the club and inject new life into the facility.
- After visiting Colonial Golf Course in Sydney's Western suburbs the JGC Board decided (amongst other initiatives) to conduct a 6-month trial of FootGolf.
- Within two months, a 9-hole FootGolf course had been designed and constructed, without significant impact to existing golf course operations.
- The introduction of FootGolf enabled the club to tap into and engage with the strong football community in the region, with many local clubs using the facility as an alternative training activity.
- At the end of the six-month trial period, FootGolf had generated almost $13,000 in green fees. After paying back the initial investment, the Jamberoo Golf Club had $7,400 profit from the first 6 months of operations.
- Given the successful introduction of FootGolf, the Board not only decided to continue offering FootGolf but they also decided to extend the course to 18 holes.
- Later that year, Jamberoo Golf Club hosted the First Australian Open FootGolf Series Event, attracting participants from all over Australia. This landmark event in the history of the sport was possible due to the effort of Jamberoo Golf Club, volunteers and members as well as the financial support received from Kiama Council.

Source: Jamberoo Golf Club

Key Insights

- FootGolf provides a product which can engage football participants and other non-traditional participant market segments.
- Alternate golf products can attract new markets to a facility and generate additional revenue.

VGFIS STRATEGIC FRAMEWORK

Strategic Focus Area 1

Tell Our Story Better

Golf facilities are seen as a community hubs and more than just places to play golf.

Our Ambition
Golf clubs and facilities are seen as modern, innovative, fun and inclusive environments.

What is Success?
More clubs and facilities engaging with more people each year.

What we will do
- Recognise, celebrate and promote case studies of successful community golf facility projects, highlighting emerging and best practice female and family friendly, entertainment and alternative format golf venues.
- Develop and continually reinforce the narrative of Australian Golf's strategic direction.
    - Elevate our engagement with public golf facility owners and operators, and leverage these relationships to align the game's messaging.
- Embed the community benefits of golf with all advocacy messaging, highlighting connections to social, health, economic and environmental outcomes.
    - Enhance the messaging of how golf can engage women, kids, teens, all-abilities, aged, multicultural and under-represented communities to develop stronger social capital.
    - Promote facility and infrastructure projects outside the golf industry to inform the broader community about the benefits of golf.

What does success look like?
- Improved community perception of golf.
- Increase in positive media articles relating to facilities.
- No net closures of Council owned golf facilities.

Strategic Focus Area 2

Attract New Golfers

Golf facilities are welcoming and inclusive of the next generation of golf participants – no matter which format of the game they choose to play.

Our Ambition

Inspiring and innovative golf facilities become the drawcard that attracts new audiences to golf.

What is Success?

More golfers having great golf experiences at clubs and facilities.

What we will do

- Understand and promote how diverse facilities can drive increased engagement of new audiences to golf.
    - Ensure innovative and alternative entry points to the game (e.g. mini golf, pitch and putt, short courses, etc.) are considered within facility and infrastructure projects.
    - Promote golf facilities and infrastructure that elevates community engagement and makes facilities more family friendly (e.g. mini golf, playgrounds, cafes, etc.).
    - Partner with clubs and facilities to implement the Golf Australia Safe, Fair and Inclusive Framework and Universal Design principles outlined in the National Golf Facility Guidelines.
    - Continue to work with clubs and facilities to implement Vision 2025: The Future of Women and Girls in Golf.
- Identify priority areas for community golf hubs and new or upgraded golf facilities.
- Engage with property developers and Local Government town planners to ensure space is allocated to develop non-traditional/off-course golf facilities, such as mini golf, pitch and putt, short course and driving ranges.
- Encourage private investment into innovative golf entertainment products.

What does success look like?

- Growth in the number of golfers across all formats.
- Increased female participation.
- Increased participation across all demographics.
- Increased access to alternative formats.

Strategic Focus Area 3

Grow Our Core

Victoria continues to provide world class courses that provide challenging and enjoyable golfing experiences for our core participants.

Our Ambition
Golf clubs and facilities are vibrant, solvent, sustainable businesses.

What is Success?
Healthy clubs and facilities that entice, inspire and are reflective of their community.

What we will do
- Develop guiding principles and recommendations for the provision and design of new and current golf courses and facilities.
- Launch the National Golf Facility Guidelines and embed the accompanying facility support resources within clubs and facilities.
- Continually update the National Golf Facility Audit data to understand current provision, accessibility and condition of all golf facilities in Victoria.
- Provide research and guidance for decision makers at golf facilities to enhance environmental and financial sustainability.
- Work more closely with clubs and facilities to address infrastructure deficiencies which negatively impact the participant experience.

What does success look like?
- Improvement in the minimum standard golf offerings.
- Improved environmental sustainability of clubs and facilities.
- Improved financial sustainability and health of clubs and facilities.

Strategic Focus Area 4

Grow Investment

Drive greater private and government investment into improving our facilities and infrastructure.

Our Ambition
Sustainable partnerships with key stakeholders and investment partners to invest in impactful golf facility projects.

What is Success?
Revenue growth and increased investment into impactful golf facility projects.

What we will do
- Partner with the Victorian Government to establish a Golf Community Infrastructure Fund.
- Grow the PlayGolf Fund initiative to support the creation of innovative, entertainment-based golf facilities.
- Pursue philanthropic and other external funding opportunities.
    - Identify facility and infrastructure investment opportunities to increase tourism and visitation outcomes.

What does success look like?
- Revenue growth for investing in golf facility projects.
- More diverse golf facilities.
- Accessibility of the game to 80% percent of the Victorian population.

Strategic Focus Area 5

Work Together

The golf industry and key external stakeholders work together to collaboratively grow the game, and drive greater engagement and connection with our facilities.

Our Ambition
Key stakeholders aligning strategies to grow the game.

What is Success?
Increased community engagement and connection with our facilities.

What we will do
- Partner and/or work with facility operators and owners, property developers and government on all golf facility projects.
- Proactively engage with State and Local Government to identify opportunities for golf, and influence the inclusion of golf facilities and infrastructure in community planning – particularly in areas of under provision.
- Investigate the creation of a Golf Facility Development Advisory Group.
- Establish regular forums with Local Government and key industry stakeholders to share key learnings and case studies of success.
- Facilitate the sharing of learnings and insights from golf facility infrastructure projects.
    - Establish a collaborative and robust approach to data collection across the industry, to ensure the outcomes from the VGFIS can be measured.
- Educate the golf industry and Local Government stakeholders on how the design of modern and contemporary clubhouse infrastructure and facilities can meet the changing needs of a diverse customer base.
- Embrace innovation and a growth mindset when planning and developing golf facilities.

What does success look like?
- Increased involvement by GA in golf facility projects.
- Golf Australia is regarded as a trusted source regarding facility planning and development.

IMPLEMENTATION APPROACH

Australian Golf is committed to implementing the VGFIS and will partner with key industry stakeholders, all levels of government and private enterprise to support the investment in golf facility and infrastructure projects that will deliver impactful strategic outcomes for the game of golf and the Victorian community.

By developing the VGFIS we aim to provide our partners with a clear understanding of the infrastructure needs and priorities of our clubs, facilities and the game more broadly that will lead to greater investment into golf infrastructure projects to meet the needs of current and future participants, and provide a range of social, health, economic and environmental benefits to the whole community.

The future planning and development of golf facilities and infrastructure will require an ongoing collaborative approach and a shared vision from all stakeholder groups.

To ensure the successful delivery of the strategy, a VGFIS Steering Group will be established to provide oversight and strategic guidance on the implementation and prioritisation of the key strategic initiatives outlined in this strategy.

The following diagram provides a high-level overview of the key actions and timelines for the successful delivery of the VGFIS.

Year 1
2022

- Launch VGFIS
- Establish VGFIS Steering Group
- Develop year 1 implementation plan and KPIs
- Conduct year 1 strategy review
- Confirm year 2 implementation plan and KPIs

→

Year 2
2023

- Implement year 2 strategic initiatives
- Conduct year 2 strategy review
- Confirm year 3 implementation plan and KPIs

→

Year 3
2024

- Implement year 3 strategic initiatives
- Conduct year 3 strategy review
- Confirm year 4 implementation plan and KPIs

→

Year 4
2025

- Implement year 4 strategic initiatives
- Conduct year 4 strategy review and evaluation of outcomes
- Refresh VGFIS in alignment with the renewal and period of the next Australian Golf Strategy

APPENDIX 1

Golf Region Analysis

FUTURE FACILITY PLANNING AND DATA SOURCES

The Golf Region Analysis has been underpinned by a detailed data model developed by SBP Advisory based on numerous data sources and the extensive research conducted through this project. This diagram provides a summary of the key elements of the model.

Four fundamental questions which shaped the model development

How many Golf Facilities are there in Victoria?	What is the capacity of each facility to meet community participation requirements?	How many people are within an accessible catchment of each golf facility?	How many people within each catchment are interested in participating at the facility?

Key data analysed to answer the fundamental questions

How many Golf Facilities are there in Victoria?	What is the capacity of each facility to meet community participation requirements?	How many people are within an accessible catchment of each golf facility?	How many people within each catchment are interested in participating at the facility?
• Facility types • Facility locations and mapping • Golf regions	• Facility types • Participation segments • Regularity of participation at each facility by each segment	• Facility locations and mapping • Drive-time accessibility catchments • Population within each catchment area	• Golf members • Non-member participation segments • Regularity of participation at each facility by each segment

Each of the above data sources, including all inputs and assumptions are outlined over the following pages.

FUTURE FACILITY PLANNING AND DATA SOURCES

This diagram provides a summary of the process undertaken to develop the model and the key data sources are also outlined on this page.

Segmented and mapped the current golf facility database.

Developed a detailed golf facility capacity and utilisation model.

Assessed community population and facility catchments, including demand, trends and utilisation.

Reviewed, discussed and validated inputs and assumptions with GA management.

Registered Participant Data

Golf participation numbers presented and analysed throughout this Strategy were provided by Golf Australia through an extract from the GOLF Link national handicapping system.

Due to the disruptions to the 2020 golfing year in Victoria as a result of the COVID-19 lockdown, for the purposes of the participant analysis for the VGIFS, an “active” registered participant has been defined as anyone who has played one round of handicap golf in either the 2019 or 2020 calendar years.

Golf Regions

The state of Victoria is divided up into 18 regions (9 in regional Victoria and 9 metropolitan Melbourne). Each region is based on a collective of the Australian Bureau of Statistics (ABS) Statistical Area Level 2 (SA2) regions.

Facility Data

Golf facility data, including infrastructure provision and condition information was collected by Golf Australia staff using the Sports Facility Auditor. While GA has made every effort to ensure data is correct, accessing and auditing 414 golf facilities (including member and remote clubs, commercial driving ranges and mini golf facilities) during a global pandemic presented some challenges.

Other Participant Types

It is important to acknowledge that registered golf participation does not reflect total participation in golf. Many golf participants engage with the game through public golf facilities, driving ranges and commercial operators such as simulators and mini golf operators. These facilities do not collect or report participant information back to Golf Australia. To estimate demand from other participant types, this analysis has used the market segmentation sizing provided in the AGIC Golf Landscape Research, 2021.

Population Data

Current population data was obtained form the Australian Bureau of Statistics. At the time of publication of this document, the most recent Estimated Residential Population (ERP) by SA2 was 2019.

Population projections are from the official state government projection of population and households, *Victoria in Future*. Projections are based on trends and assumptions for births, life expectancy, migration, and living arrangements across all of Victoria. It should be noted that at the time of publication, the most recent version of these projections is July 2019 and therefore do not factor in any impact from reduced international migration as a result of the COVID-19 pandemic.

FUTURE FACILITY PLANNING PRIORITIES – KEY INPUTS AND ASSUMPTIONS

The forecast of facility needs includes variables for population change, facility capacity, current membership and broader consumer demand for each type of facility. Current membership, population and population change inputs are unique to each region analysed and presented on the relevant pages of this document. New Facility Requirements is based on a ratio of the number of facilities required in 2031 divided by the current number of facilities. The following information relates specifically to facility capacity.

Facility Capacity Model

This table provides the key inputs used to calculate the maximum capacity of each type of golf facility. Each of the variables is multiplied to determine the total number of transactions each facility can process each year. The number of unique patrons required to generate this maximum capacity was then modeled.

	Variables						
	Course/Bay/Unit	Access Days	Hours	People per unit per hour	Practical/realistic time at full capacity	Rounds/ Transactions	Unique Members/Patrons*
Golf Course (Members)	1	360	10	36	45%	58,320	1,172
Golf Course (Public)	1	360	10	36	55%	71,280	7,273
Driving Range	40	360	10	1	50%	72,000	7,347
Simulators	6	360	15	2	70%	45,360	4,629
Mini Golf	1	360	15	54	65%	189,540	19,341

Unique Patrons*

To convert total Annual Rounds/Transactions into unique customers, five customer segments were modelled based on their assumed regularity of patronage. Total Rounds/Transactions is then divided by the weighted average number of transactions per unique customer. This tables provides the key inputs used for this calculation.

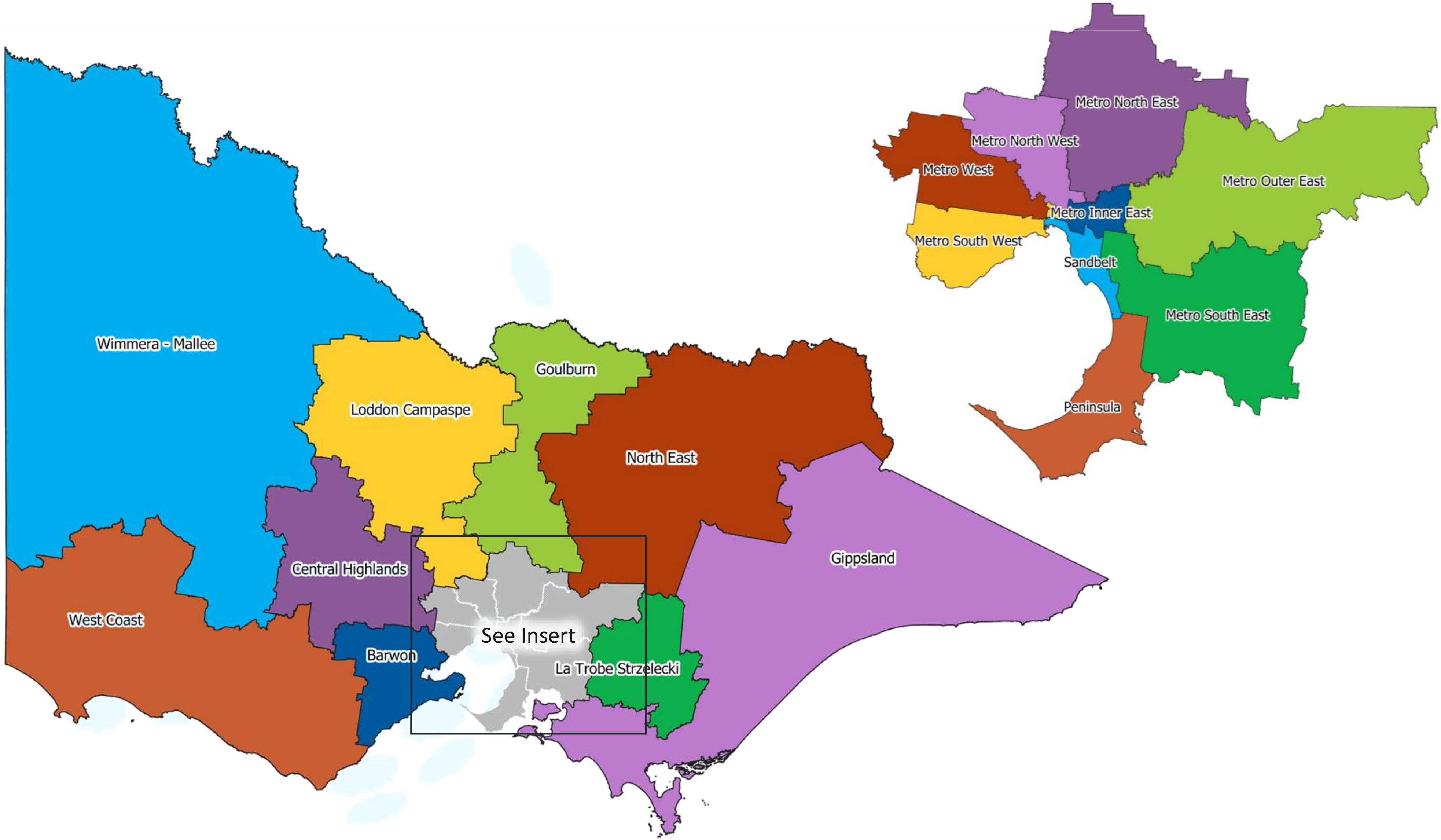
Market	Member Facilities		Public Facilities	
	Visits per year	Proportion of overall customers	Visits per year	Proportion of overall customers
Very regular	75	25%	-	-
Regular	50	50%	20	25%
Semi-regular	30	15%	10	35%
Seasonal	15	10%	4	30%
Visitor	-	-	1	10%
Weighted Average		49.75%		9.8%

FUTURE FACILITY PLANNING PRIORITIES – KEY INPUTS AND ASSUMPTIONS

The level of community demand for each type of facility was modelled based on actual member data, and indicative demand assumptions for public golf facilities. This table outlines the proportion of each segment (based on Australian Golf Industry Council's market research carried out in 2021) which engages with each of the facility types (i.e., all 'ball hitters' engage with a driving range each year, and 10% will also use a golf simulator and 20% will also play Mini Golf).

Market Research Segments	% of segment which engages with each type of golf facility				
	Golf Course (Member)	Golf Course (Public)	Driving Range	Simulator	Mini Golf
Members	100.0%	10.0%	100.0%	10.0%	10.0%
Round Players	20.0%	100.0%	100.0%	10.0%	20.0%
Ball Hitters	0.0%	0.0%	100.0%	10.0%	20.0%
Alternative Players (e.g. mini golf)	0.0%	0.0%	0.0%	0.0%	100.0%
Not Yet Engaged	0.0%	0.0%	0.0%	0.0%	0.0%
% of Total Population engaging with each facility type.	1.6%	2.6%	4.8%	0.5%	7.2%

VICTORIA GOLF REGIONS



METRO MELBOURNE SUMMARY – FACILITY PROVISION

Current population and golf facility supply

Total Population	Population Growth (2031)	Member Clubs	Public Courses	Driving Ranges	Simulators	Mini Golf
5.1 million	25.4%	78	36	24	15	25

Current Accessibility and Future Facility Planning Priorities

Facility Type		Drive Time (Mins)	Catchment	% of Population within specified catchment	New facility requirements	Strategic Priorities
Golf Course/ Short Course	Member Club	5	757,981	17%	M	• Maintain current provision. • Opportunities in Melbourne's north for new public and short courses (up to 2 new courses in the West).
		10	3,296,634	74%		
	Public Course	5	412,952	9%		
		10	2,571,009	58%		
		15	3,611,983	81%		
Driving Range		5	169,194	4%	↑	• Increase provision of driving range facilities (up to 10 new facilities) in strategic locations across the metropolitan area to address gaps.
		10	2,967,866	67%		
		15	3,296,634	74%		
Simulator		15	1,481,799	33%	↑	• Encourage new simulators as an innovative format and guide provision to supplement driving ranges where space is a constraint.
		20	2,536,026	57%		
		30	3,144,111	71%		
Mini Golf		15	2,561,106	57%	↑	• Identify opportunities to increase mini golf facilities in West and North (6 new facilities).
		20	3,456,740	78%		

New Facility Requirements *is based on a ratio of the number of facilities required in 2031 divided by the current number of facilities. The facilities required equation includes variables for population change, facility capacity, current membership and broader consumer demand for each type of facility.*

METRO SUMMARY – MEMBERSHIP

	Metro Melbourne		Victoria	
Total Population	**5,045,764**		**6,596,039**	
Male	2,498,486	**49.5%**	3,266,931	**49.5%**
Female	2,547,278	**50.5%**	3,329,108	**50.5%**

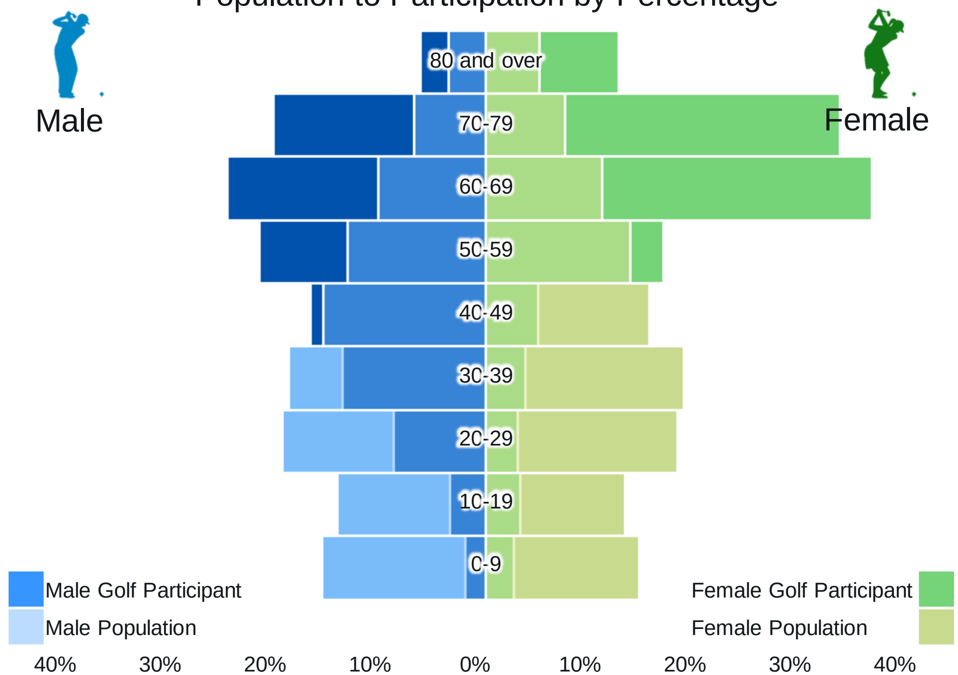
Total Participation	**92,848**		**150,367**	
Male	76,916	**82.8%**	122,385	**81.4%**
Female	15,932	**17.2%**	27,982	**18.6%**

Participation Rate	**1.8%**	**2.3%**
Male	3.1%	3.7%
Female	0.6%	0.8%

Projected Population (2031)

	Male	**Female**	**Total**
Projected Population (2031)	3,141,313	3,186,173	6,327,486
Change	642,827	638,895	1,281,722
Percentage Growth	25.7%	25.1%	25.4%

Population to Participation by Percentage



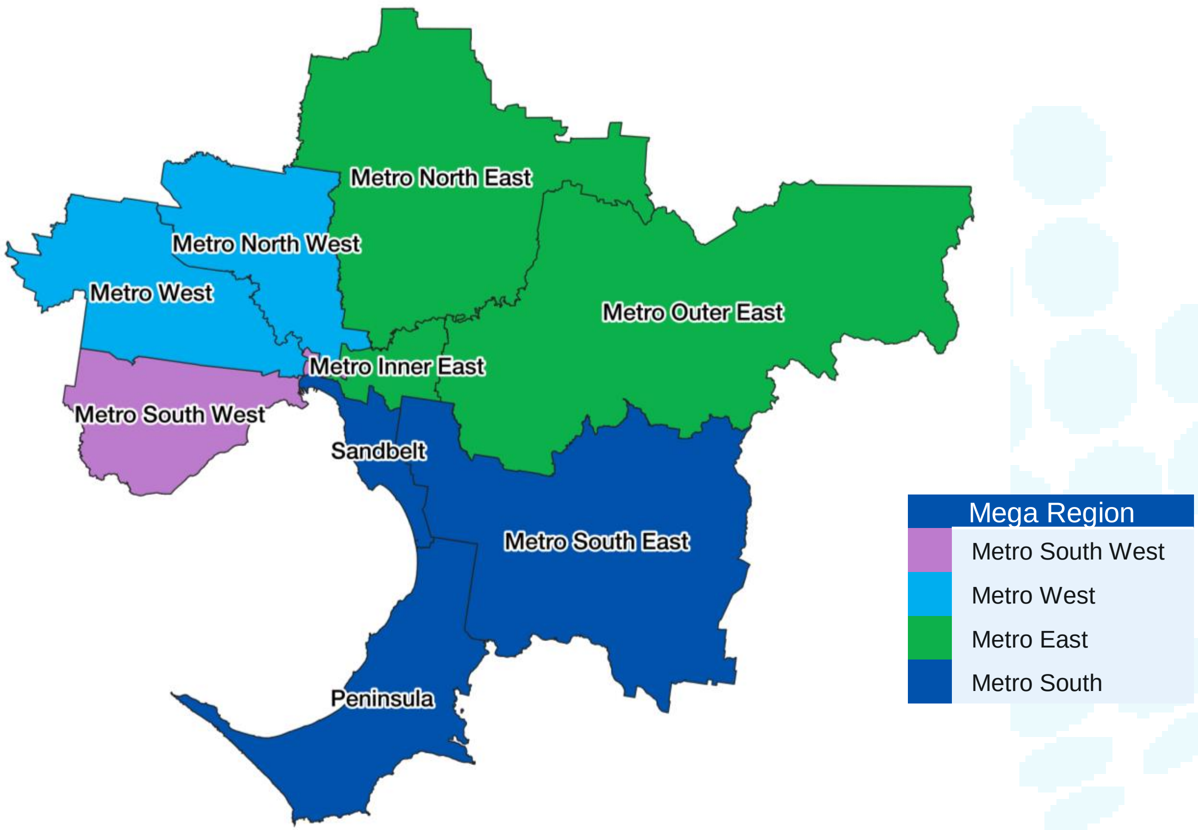
Male				Female		
Total Population	Total Participation	Participation Rate	Age	Total Population	Total Participation	Participation Rate
78,145	4,036	5.2%	**80+**	111,116	1,601	1.4%
144,278	12,186	8.4%	**70-79**	160,860	4,222	2.6%
215,448	14,577	6.8%	**60-69**	233,717	4,505	1.9%
279,427	13,184	4.7%	**50-59**	294,634	2,148	0.7%
326,419	9,799	3.0%	**40-49**	334,550	596	0.2%
408,717	7,814	1.9%	**30-39**	413,591	376	0.1%
426,834	5,083	1.2%	**20-29**	411,840	379	0.1%
296,149	1,922	0.6%	**10-19**	281,846	379	0.1%
323,069	1,102	0.3%	**0-9**	305,124	300	0.1%

METROPOLITAN MELBOURNE – MEGA REGIONS

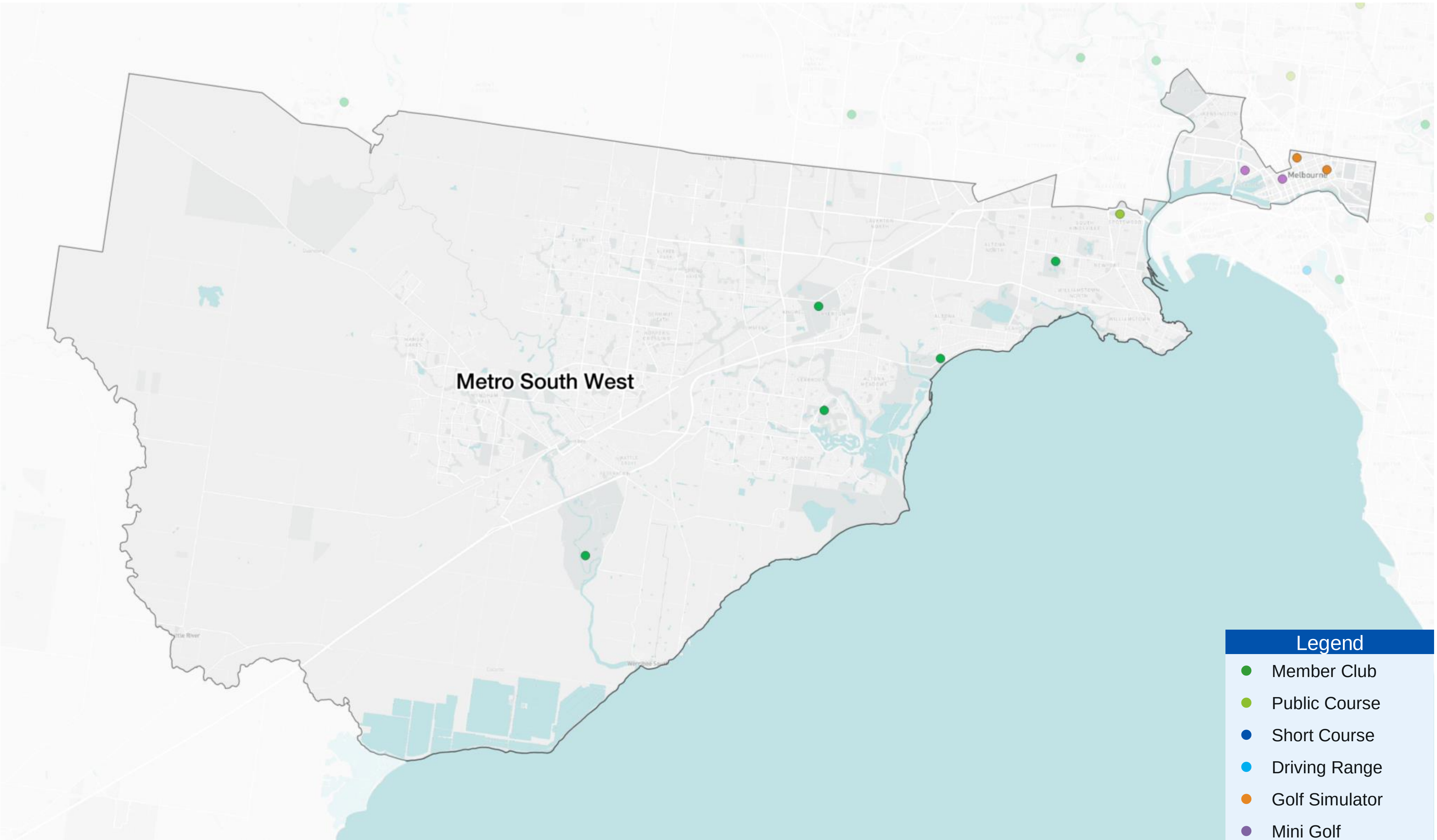
One of the unique characteristics of Victorian golf participants is their willingness to travel to play golf. As such, it is important to have a broad based regional approach to facility provision. This allows for excess capacity in one region to offset an undersupply within a neighbouring area.

To allow for this, the existing Victorian Golf Regions for Metropolitan Melbourne have been amalgamated into four Mega Regions. Each of the Victorian Golf Regions have been grouped into the Mega Regions based on key transport corridors and analysis of the accessibility from one region to the next. This is not necessary for Regional Victoria due to the vast geographical area and relatively spare populations within these regions.

Detailed population and facility provision analysis for each Mega Region can be found on the following pages.



METROPOLITAN MELBOURNE SOUTH WEST – CONTEXT MAP



METROPOLITAN MELBOURNE SOUTH WEST – FACILITY PROVISION SUMMARY

Current population and golf facility supply

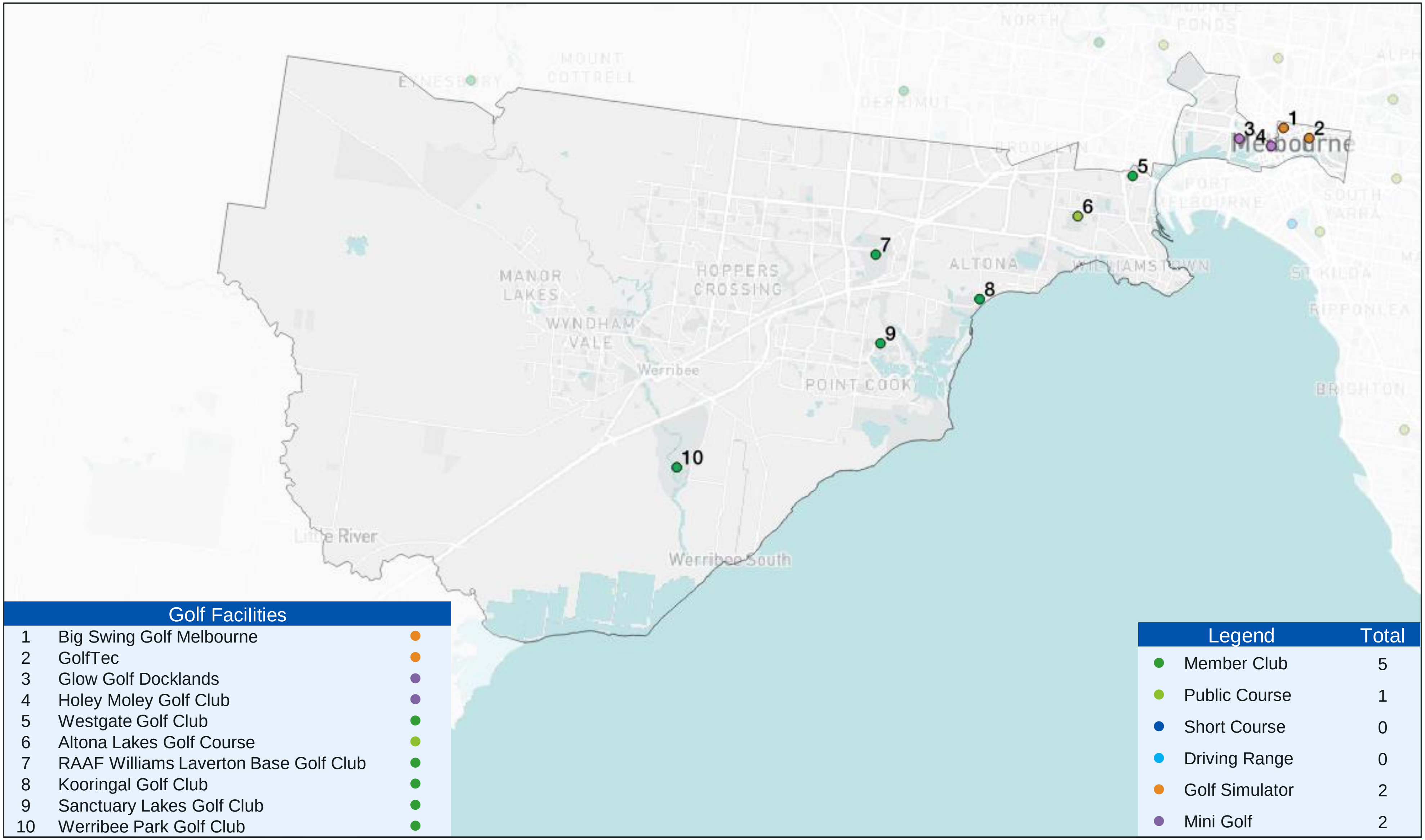
Total Population	Population Growth (2031)	Member Clubs	Public Courses	Driving Ranges	Simulators	Mini Golf
454,018	43.44%	5	1	0	0	2

Current Accessibility and Future Facility Planning Priorities

Facility Type		Drive Time (Mins)	Catchment	% of Population within specified catchment	New facility requirements	Strategic Priorities
Golf Course/ Short Course	Member Club	5	36,831	10%	↑	• Increase current provision. • Identify opportunities for new public and short courses (up to two new courses).
		10	220,807	60%		
	Public Course	5	5,182	1%		
		10	99,308	27%		
		15	123,901	34%		
Driving Range		5	0	0%	↑	• Increase in driving range facilities (6 new facilities) in strategic locations to address gaps.
		10	72,408	20%		
		15	220,807	60%		
Simulator		15	59,617	16%	↑	• Encourage new simulators as an innovative format and guide provision to supplement driving ranges where space is a constraint.
		20	67,832	18%		
		30	103,245	28%		
Mini Golf		15	93,056	25%	↑	• Increase in mini golf facilities (up to 2 new facilities).
		20	124,764	34%		

***New Facility Requirements** is based on a ratio of the number of facilities required in 2031 divided by the current number of facilities. The facilities required equation includes variables for population change, facility capacity, current membership and broader consumer demand for each type of facility.*

METRO SOUTH WEST – GOLF FACILITIES



Golf Facilities		
1	Big Swing Golf Melbourne	● (orange)
2	GolfTec	● (orange)
3	Glow Golf Docklands	● (purple)
4	Holey Moley Golf Club	● (purple)
5	Westgate Golf Club	● (dark green)
6	Altona Lakes Golf Course	● (light green)
7	RAAF Williams Laverton Base Golf Club	● (dark green)
8	Kooringal Golf Club	● (dark green)
9	Sanctuary Lakes Golf Club	● (dark green)
10	Werribee Park Golf Club	● (dark green)

Legend	Total
Member Club	5
Public Course	1
Short Course	0
Driving Range	0
Golf Simulator	2
Mini Golf	2

METRO SOUTH WEST – MEMBERSHIP

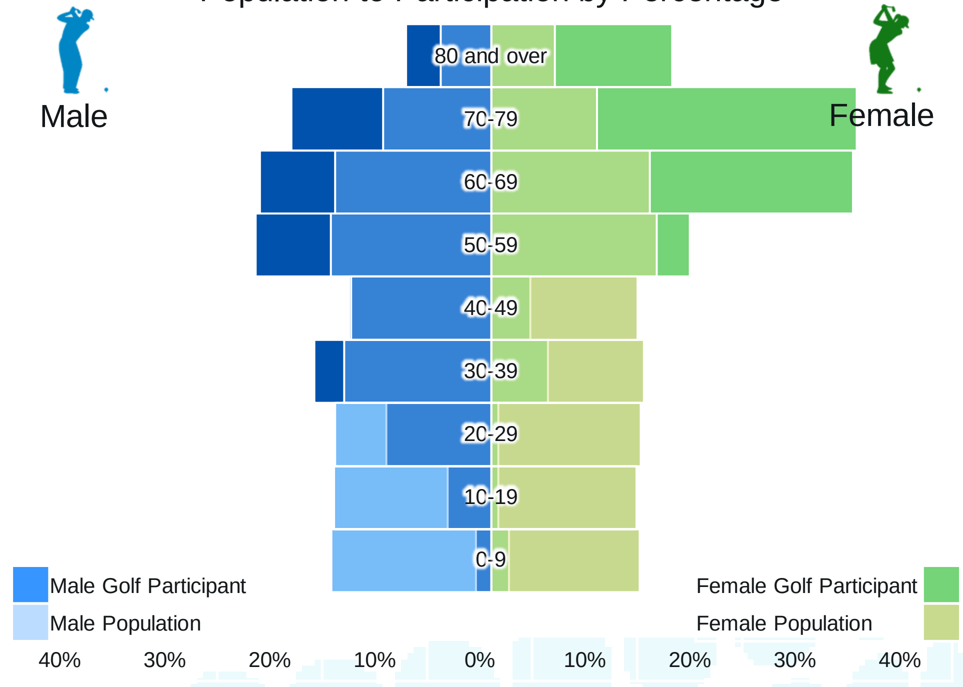
GolfAustralia

	Metro South West		Metro Melbourne		Victoria	
Total Population	**454,018**		**5,045,764**		**6,596,039**	
Male	227,660	**50.1%**	2,498,486	**49.5%**	3,266,931	**49.5%**
Female	226,358	**49.9%**	2,547,278	**50.5%**	3,329,108	**50.5%**
Total Participation	**5,215**		**92,848**		**150,367**	
Male	4,520	**87%**	76,916	**82.8%**	122,385	**81.4%**
Female	695	**13%**	15,932	**17.2%**	27,982	**18.6%**
Participation Rate	**1.1%**		**1.8%**		**2.3%**	
Male	2.0%		3.1%		3.7%	
Female	0.3%		0.6%		0.8%	

Projected Population (2031)

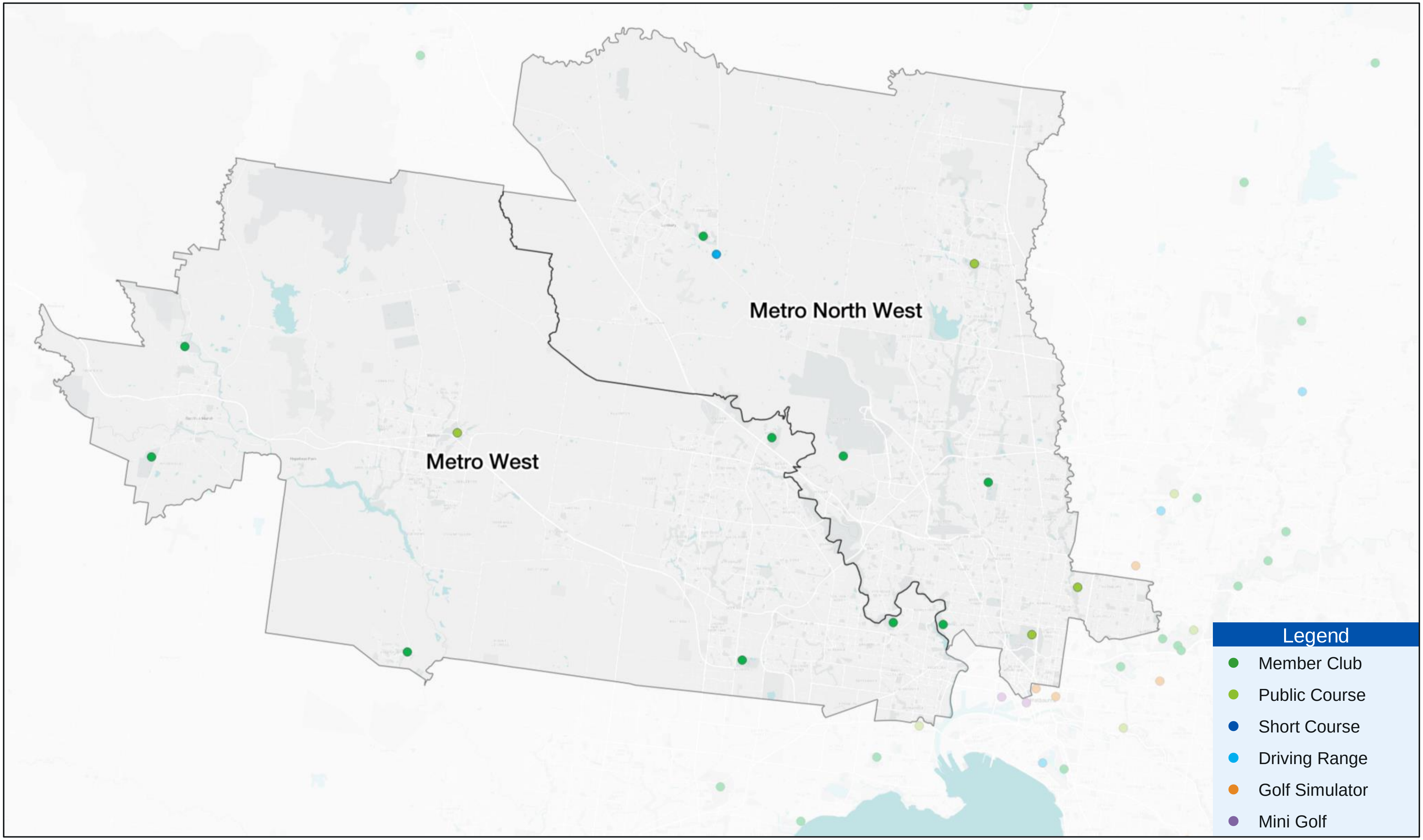
	Male	Female	Total
Projected Population (2031)	325,349	325,877	651,226
Change	97,689	99,519	197,208
Percentage Growth	42.9%	44.0%	43.4%

Population to Participation by Percentage



Male				Female		
Total Population	Total Participation	Participation Rate	Age	Total Population	Total Participation	Participation Rate
3,883	100	2.6%	**80+**	5,310	24	0.5%
8,547	533	6.2%	**70-79**	9,170	128	1.4%
14,925	748	5.0%	**60-69**	15,745	171	1.1%
20,918	838	4.0%	**50-59**	21,614	103	0.5%
29,492	666	2.3%	**40-49**	27,799	37	0.1%
45,632	437	1.0%	**30-39**	45,884	36	0.1%
44,194	247	0.6%	**20-29**	43,634	21	0.0%
25,466	87	0.3%	**10-19**	24,389	16	0.1%
34,603	37	0.1%	**0-9**	32,813	6	0.0%

METROPOLITAN MELBOURNE NORTH – CONTEXT MAP



METROPOLITAN MELBOURNE WEST – FACILITY PROVISION SUMMARY

GolfAustralia

Current population and golf facility supply

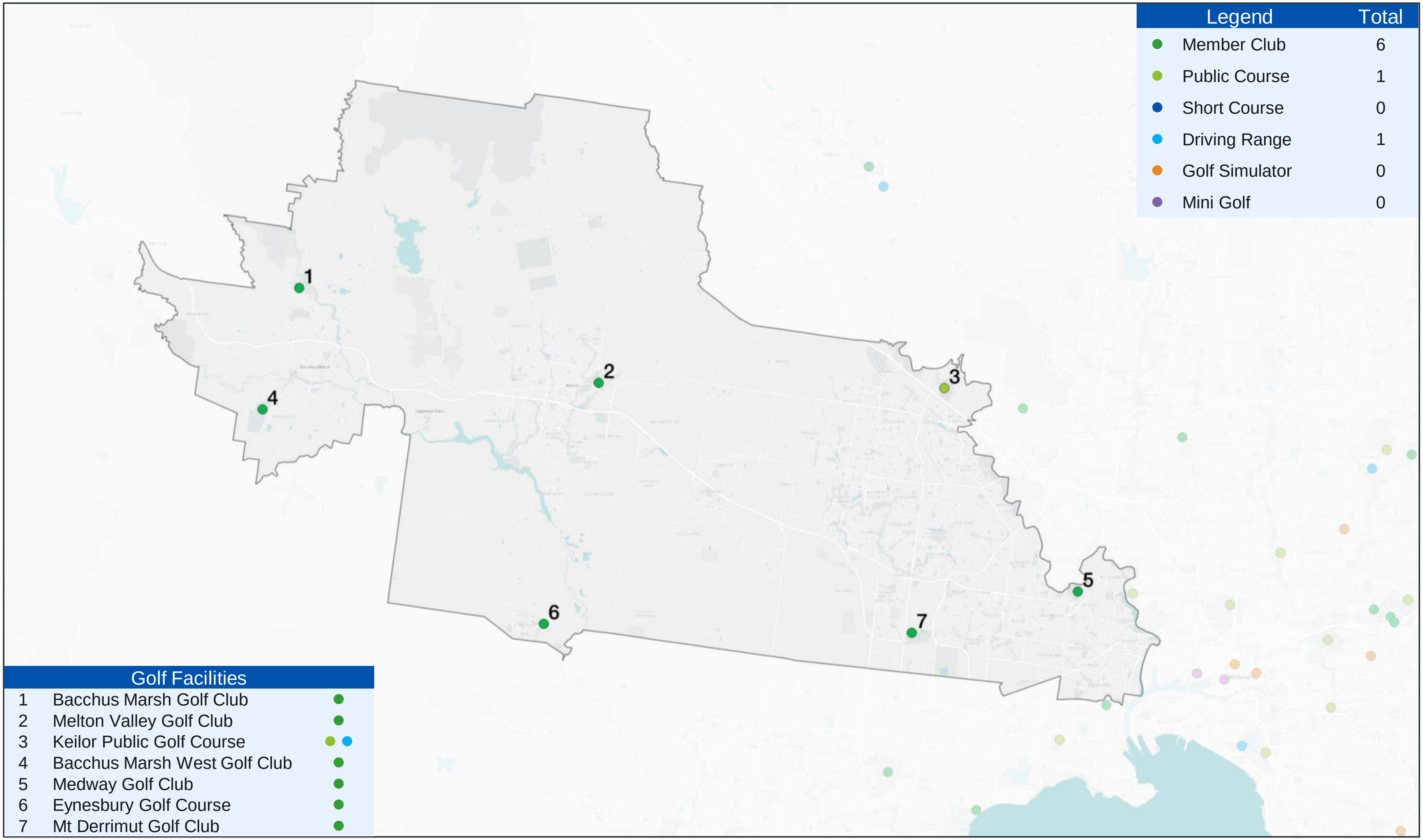
Total Population	Population Growth (2031)	Member Clubs	Public Courses	Driving Ranges	Simulators	Mini Golf
1,166,969	30.94%	10	4	4	4	1

Current Accessibility and Future Facility Planning Priorities

Facility Type		Drive Time (Mins)	Catchment	% of Population within specified catchment	New facility requirements	Strategic Priorities
Golf Course/ Short Course	Member Club	5	162,575	16%	↑	• Increase current provision. • Identify opportunities for new public and short courses (up to 2 new courses).
		10	827,281	81%		
	Public Course	5	118,871	12%		
		10	772,187	75%		
		15	949,804	93%		
Driving Range		5	37,485	4%	↑	• Increase in driving range facilities (6 new facilities) in strategic locations to address gaps.
		10	672,691	66%		
		15	827,281	81%		
Simulator		15	556,128	54%	↑	• Encourage new simulators as an innovative format and guide provision to supplement driving ranges where space is a constraint.
		20	828,074	81%		
		30	928,530	91%		
Mini Golf		15	652,396	64%	↑	• Increase in mini golf facilities (up to 2 new facilities).
		20	941,312	92%		

New Facility Requirements *is based on a ratio of the number of facilities required in 2031 divided by the current number of facilities. The facilities required equation includes variables for population change, facility capacity, current membership and broader consumer demand for each type of facility.*

METRO WEST – GOLF FACILITIES



Legend	Total
Member Club	6
Public Course	1
Short Course	0
Driving Range	1
Golf Simulator	0
Mini Golf	0

Golf Facilities	
1	Bacchus Marsh Golf Club
2	Melton Valley Golf Club
3	Keilor Public Golf Course
4	Bacchus Marsh West Golf Club
5	Medway Golf Club
6	Eynesbury Golf Course
7	Mt Derrimut Golf Club

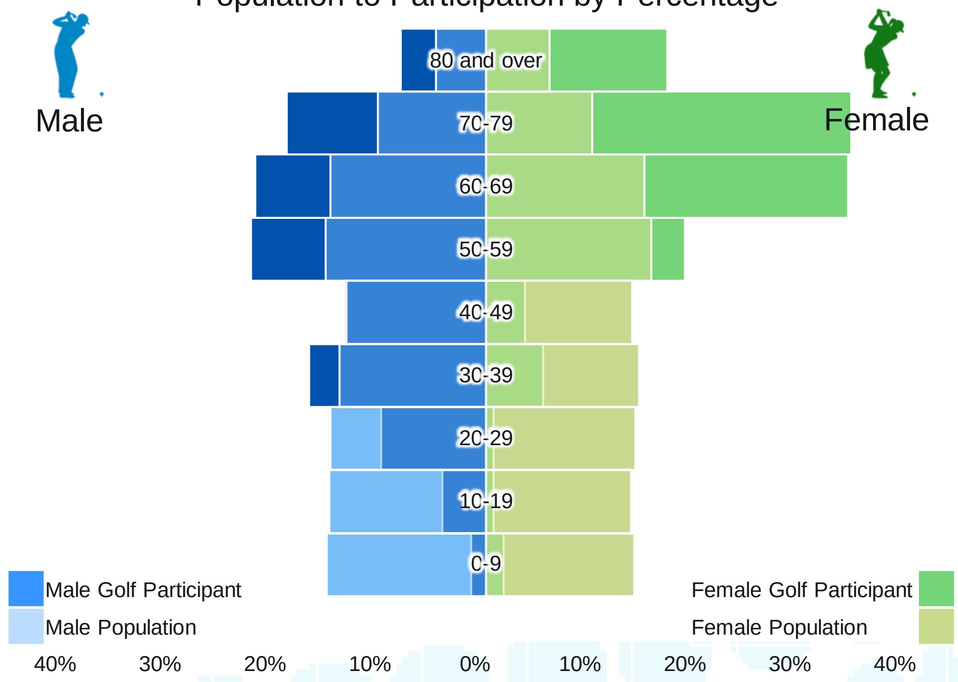
METRO WEST – MEMBERSHIP

	Metro West		Metro Melbourne		Victoria	
Total Population	**478,219**		**5,045,764**		**6,596,039**	
Male	241,369	**50.5%**	2,498,486	**49.5%**	3,266,931	**49.5%**
Female	236,850	**49.5%**	2,547,278	**50.5%**	3,329,108	**50.5%**
Total Participation	**3,741**		**92,848**		**150,367**	
Male	3,413	**91%**	76,916	**82.8%**	122,385	**81.4%**
Female	328	**9%**	15,932	**17.2%**	27,982	**18.6%**
Participation Rate	**0.8%**		**1.8%**		**2.3%**	
Male	1.4%		3.1%		3.7%	
Female	0.1%		0.6%		0.8%	

Projected Population (2031)

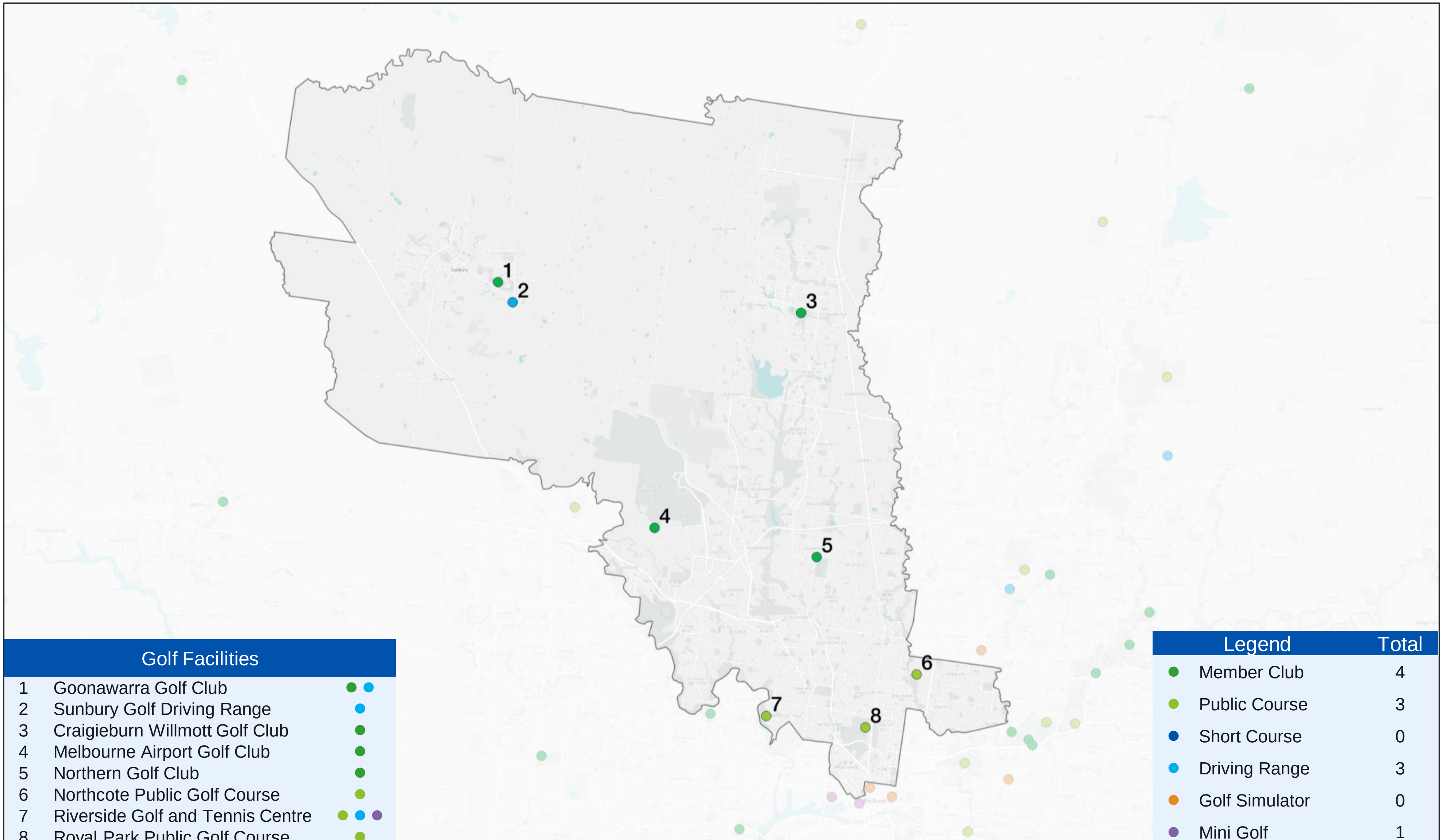
	Male	**Female**	**Total**
Projected Population (2031)	327,132	325,398	652,530
Change	85,763	88,548	174,311
Percentage Growth	35.5%	37.4%	36.5%

Population to Participation by Percentage



Male				Female		
Total Population	Total Participation	Participation Rate	Age	Total Population	Total Participation	Participation Rate
4,995	64	1.3%	**80+**	7,116	14	0.2%
11,813	292	2.5%	**70-79**	12,239	52	0.4%
19,844	549	2.8%	**60-69**	20,991	64	0.3%
25,525	489	1.9%	**50-59**	26,409	43	0.2%
32,440	611	1.9%	**40-49**	32,082	19	0.1%
41,965	436	1.0%	**30-39**	40,524	16	0.0%
41,920	219	0.5%	**20-29**	37,376	9	0.0%
28,731	118	0.4%	**10-19**	27,705	17	0.1%
34,136	24	0.1%	**0-9**	32,408	5	0.0%

METRO NORTH WEST – GOLF FACILITIES



Golf Facilities		
1	Goonawarra Golf Club	● ●
2	Sunbury Golf Driving Range	●
3	Craigieburn Willmott Golf Club	●
4	Melbourne Airport Golf Club	●
5	Northern Golf Club	●
6	Northcote Public Golf Course	●
7	Riverside Golf and Tennis Centre	● ● ●
8	Royal Park Public Golf Course	●

Legend	Total
Member Club	4
Public Course	3
Short Course	0
Driving Range	3
Golf Simulator	0
Mini Golf	1

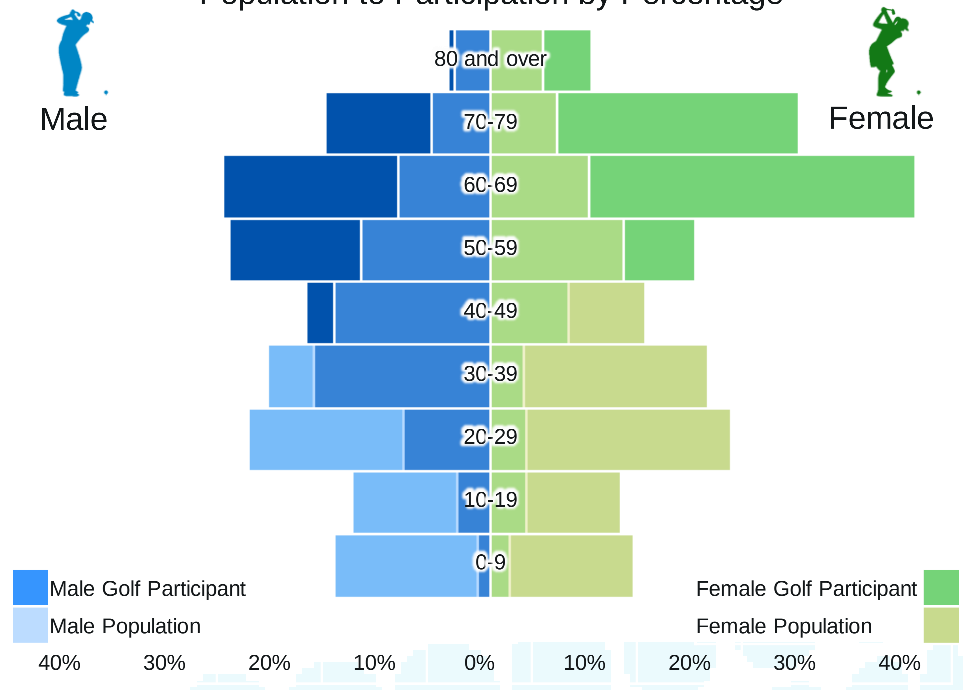
METRO NORTH WEST – MEMBERSHIP

	Metro North West		Metro Melbourne		Victoria	
Total Population	**688,750**		**5,045,764**		**6,596,039**	
Male	339,293	**49.3%**	2,498,486	**49.5%**	3,266,931	**49.5%**
Female	349,457	**50.7%**	2,547,278	**50.5%**	3,329,108	**50.5%**
Total Participation	**6,673**		**92,848**		**150,367**	
Male	5,948	**89%**	76,916	**82.8%**	122,385	**81.4%**
Female	725	**11%**	15,932	**17.2%**	27,982	**18.6%**
Participation Rate	**1.0%**		**1.8%**		**2.3%**	
Male	1.8%		3.1%		3.7%	
Female	0.2%		0.6%		0.8%	

Projected Population (2031)

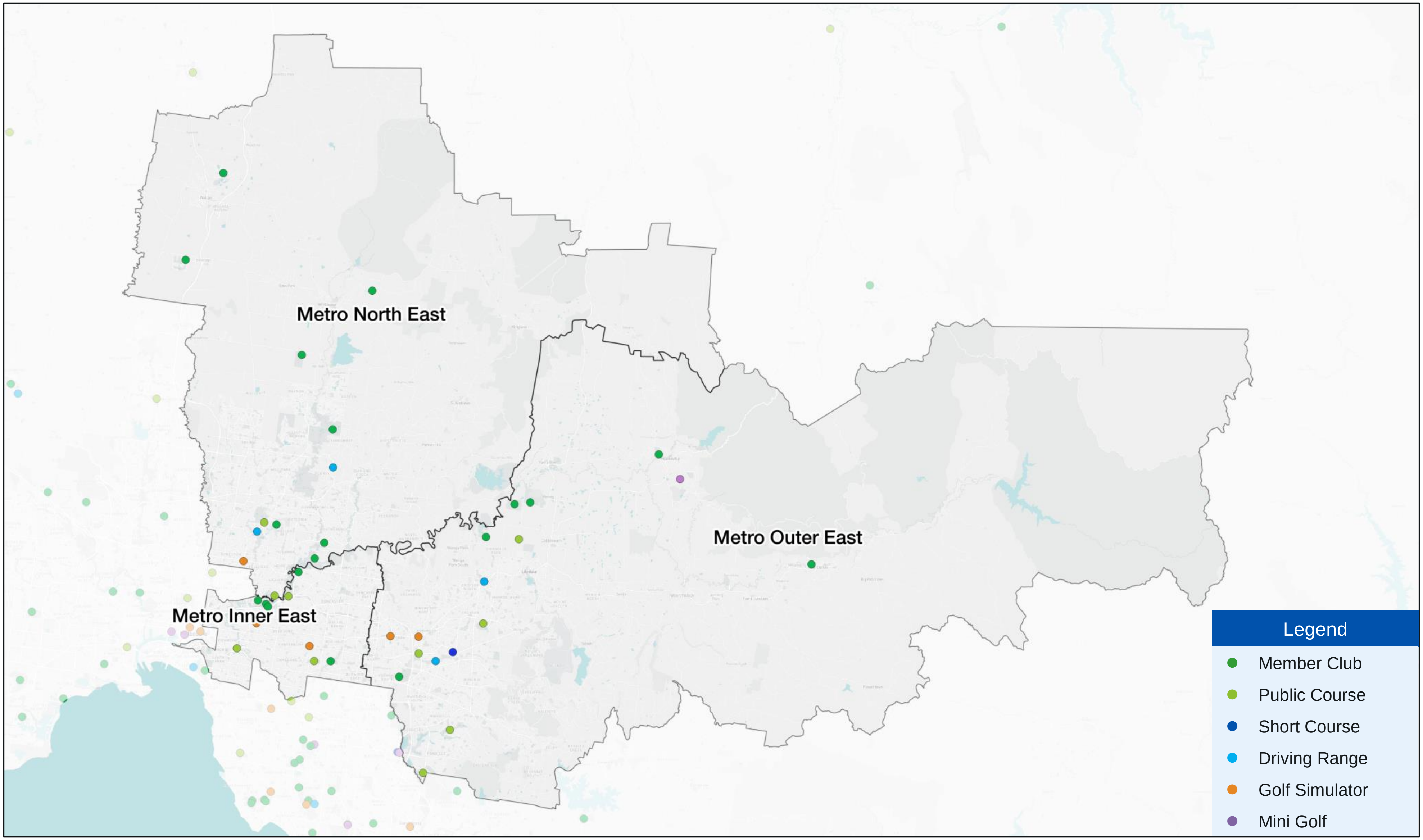
	Male	Female	Total
Projected Population (2031)	433,855	441,643	875,498
Change	94,562	92,186	186,748
Percentage Growth	27.9%	26.4%	27.1%

Population to Participation by Percentage



Male				Female		
Total Population	Total Participation	Participation Rate	Age	Total Population	Total Participation	Participation Rate
9,913	184	1.9%	**80+**	14,617	55	0.4%
16,377	719	4.4%	**70-79**	18,684	168	0.9%
25,401	1,163	4.6%	**60-69**	27,792	231	0.8%
35,638	1,133	3.2%	**50-59**	37,599	111	0.3%
42,922	801	1.9%	**40-49**	43,855	42	0.1%
61,303	765	1.2%	**30-39**	61,450	18	0.0%
66,754	377	0.6%	**20-29**	68,126	19	0.0%
38,016	147	0.4%	**10-19**	36,887	19	0.1%
42,969	59	0.1%	**0-9**	40,447	10	0.0%

METROPOLITAN MELBOURNE EAST – CONTEXT MAP



METROPOLITAN MELBOURNE EAST – FACILITY PROVISION SUMMARY

GolfAustralia

Current population and golf facility supply

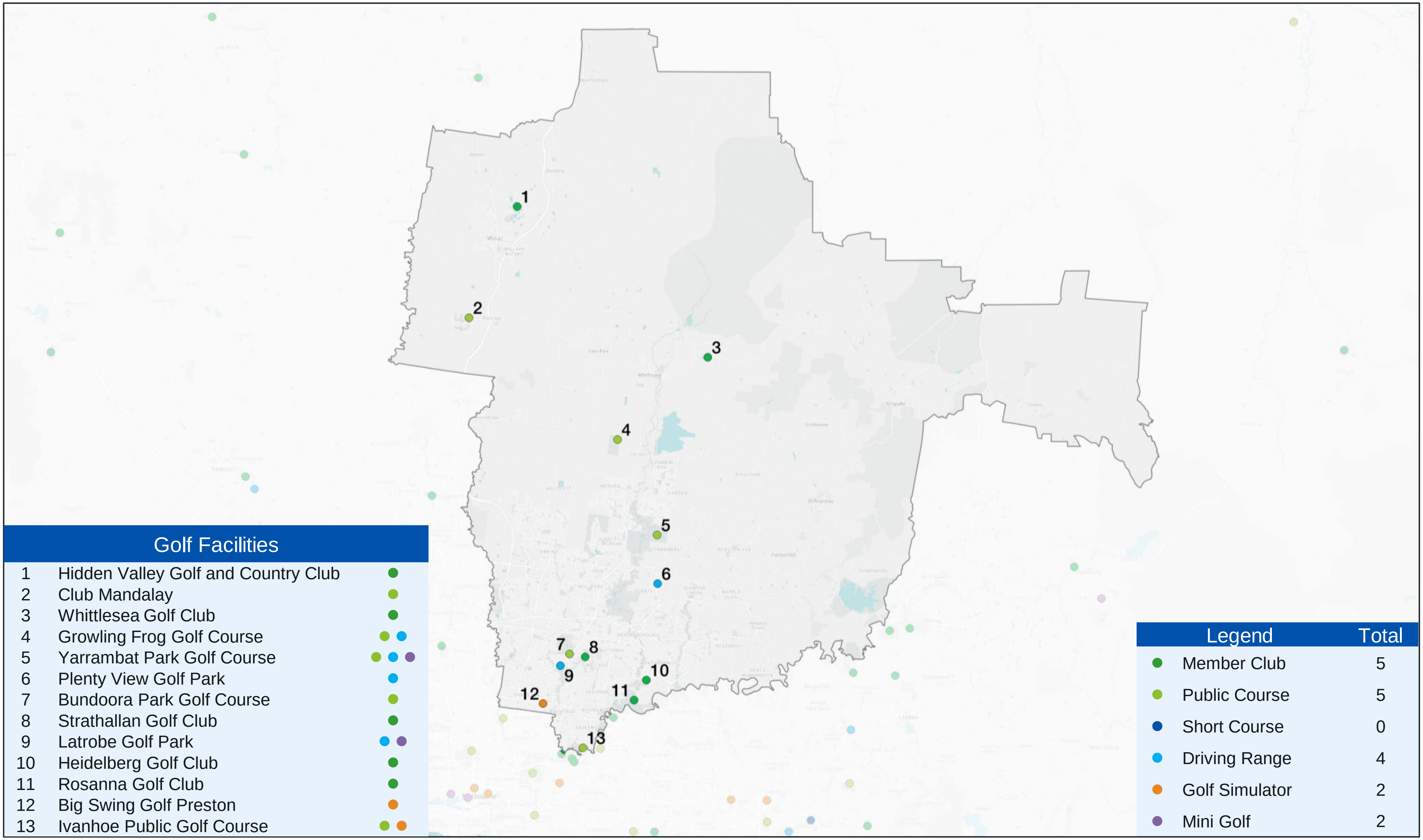
Total Population	Population Growth (2031)	Member Clubs	Public Courses	Driving Ranges	Simulators	Mini Golf
1,686,685	20.13%	19	13	9	9	6

Current Accessibility and Future Facility Planning Priorities

Facility Type		Drive Time (Mins)	Catchment	% of Population within specified catchment	New facility requirements	Strategic Priorities
Golf Course/ Short Course	Member Club	5	162,575	16%	M	• Maintain current provision.
		10	827,281	81%		
	Public Course	5	118,871	12%		
		10	772,187	75%		
		15	949,804	93%		
Driving Range		5	37,485	4%	↑	• Need for 1 new driving range facility in a strategic location to address accessibility gaps.
		10	672,691	66%		
		15	827,281	81%		
Simulator		15	556,128	54%	↑	• Encourage new simulators as an innovative format and guide provision to supplement driving ranges where space is a constraint.
		20	828,074	81%		
		30	928,530	91%		
Mini Golf		15	652,396	64%	M	• Maintain the exiting provision of mini golf facilities.
		20	941,312	92%		

New Facility Requirements *is based on a ratio of the number of facilities required in 2031 divided by the current number of facilities. The facilities required equation includes variables for population change, facility capacity, current membership and broader consumer demand for each type of facility.*

METRO NORTH EAST – GOLF FACILITIES



Golf Facilities

1	Hidden Valley Golf and Country Club
2	Club Mandalay
3	Whittlesea Golf Club
4	Growling Frog Golf Course
5	Yarrambat Park Golf Course
6	Plenty View Golf Park
7	Bundoora Park Golf Course
8	Strathallan Golf Club
9	Latrobe Golf Park
10	Heidelberg Golf Club
11	Rosanna Golf Club
12	Big Swing Golf Preston
13	Ivanhoe Public Golf Course

Legend	Total
Member Club	5
Public Course	5
Short Course	0
Driving Range	4
Golf Simulator	2
Mini Golf	2

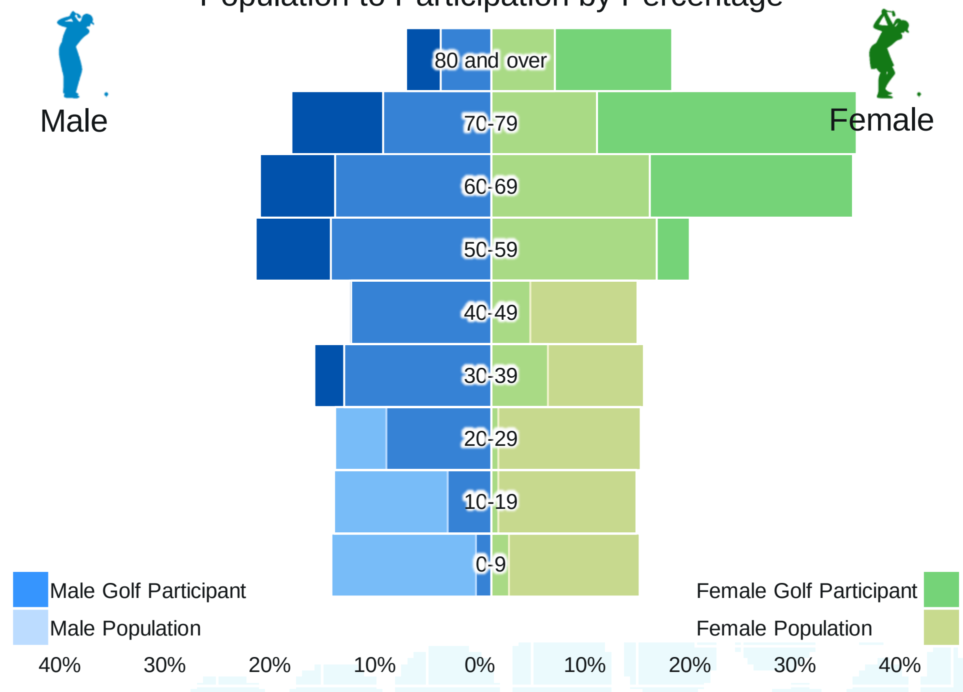
METRO NORTH EAST – MEMBERSHIP

	Metro North East		Metro Melbourne		Victoria	
Total Population	**556,655**		**5,045,764**		**6,596,039**	
Male	276,217	**49.6%**	2,498,486	**49.5%**	3,266,931	**49.5%**
Female	280,438	**50.4%**	2,547,278	**50.5%**	3,329,108	**50.5%**
Total Participation	**6,928**		**92,848**		**150,367**	
Male	6,018	**87%**	76,916	**82.8%**	122,385	**81.4%**
Female	910	**13%**	15,932	**17.2%**	27,982	**18.6%**
Participation Rate	**1.2%**		**1.8%**		**2.3%**	
Male	2.2%		3.1%		3.7%	
Female	0.3%		0.6%		0.8%	

Projected Population (2031)

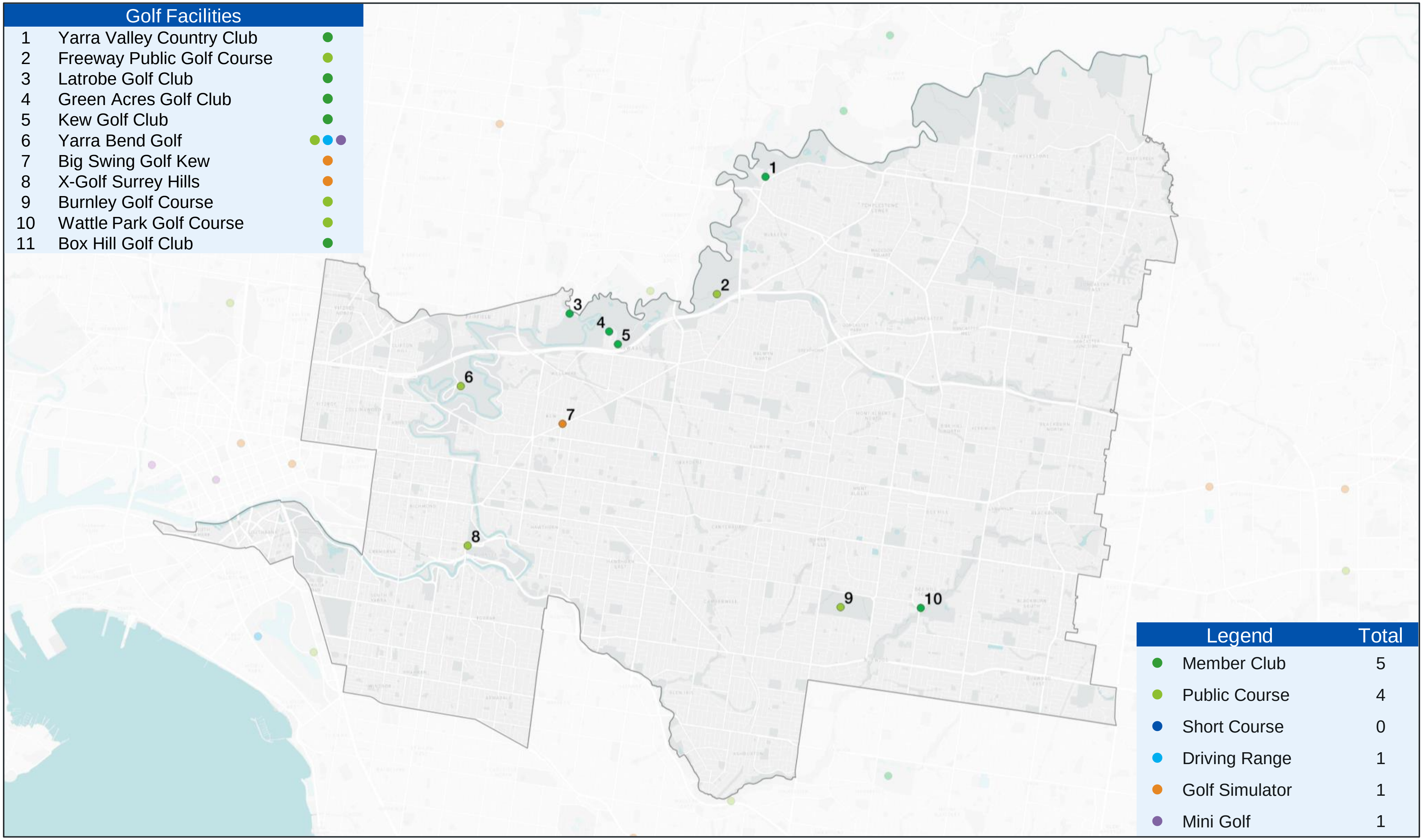
	Male	Female	Total
Projected Population (2031)	358,920	362,814	721,734
Change	82,703	82,376	165,079
Percentage Growth	29.9%	29.4%	29.7%

Population to Participation by Percentage



Male				Female		
Total Population	Total Participation	Participation Rate	Age	Total Population	Total Participation	Participation Rate
8,375	201	2.4%	**80+**	11,701	55	0.5%
16,317	771	4.7%	**70-79**	17,613	214	1.2%
24,116	1,197	5.0%	**60-69**	26,560	248	0.9%
31,145	995	3.2%	**50-59**	33,245	122	0.4%
37,340	701	1.9%	**40-49**	37,810	31	0.1%
44,509	690	1.6%	**30-39**	45,415	17	0.0%
42,773	400	0.9%	**20-29**	40,688	29	0.1%
33,083	126	0.4%	**10-19**	31,045	25	0.1%
38,559	76	0.2%	**0-9**	36,361	11	0.0%

METRO INNER EAST – GOLF FACILITIES



Golf Facilities		
1	Yarra Valley Country Club	Member Club
2	Freeway Public Golf Course	Public Course
3	Latrobe Golf Club	Member Club
4	Green Acres Golf Club	Member Club
5	Kew Golf Club	Member Club
6	Yarra Bend Golf	Public Course, Driving Range, Mini Golf
7	Big Swing Golf Kew	Golf Simulator
8	X-Golf Surrey Hills	Golf Simulator
9	Burnley Golf Course	Public Course
10	Wattle Park Golf Course	Public Course
11	Box Hill Golf Club	Member Club

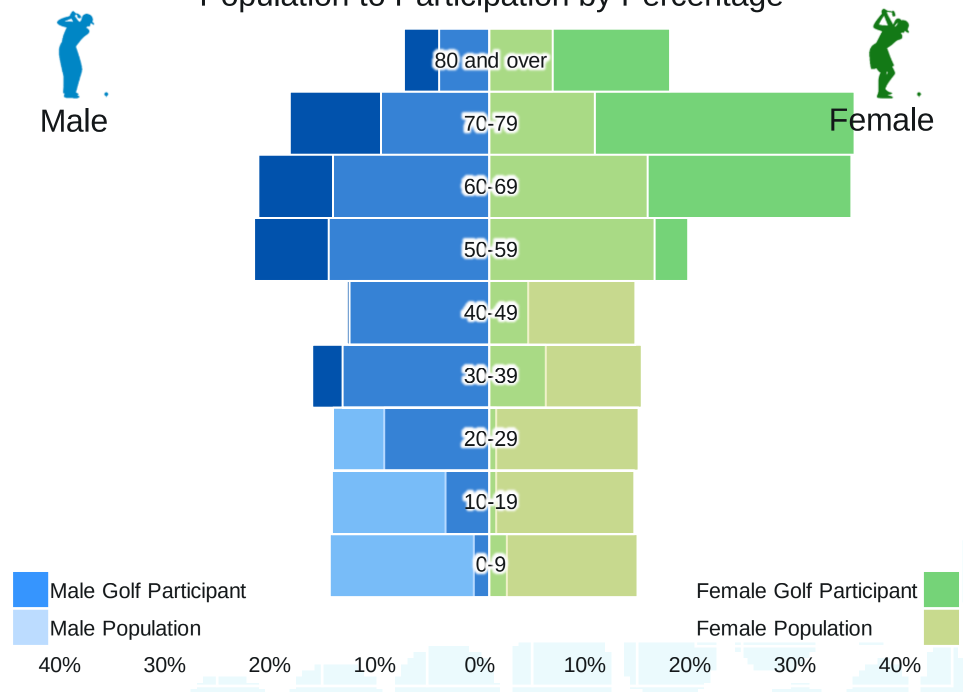
Legend	Total
Member Club	5
Public Course	4
Short Course	0
Driving Range	1
Golf Simulator	1
Mini Golf	1

	Metro Inner East		Metro Melbourne		Victoria	
Total Population	595,545		5,045,764		6,596,039	
Male	290,461	**48.8%**	2,498,486	**49.5%**	3,266,931	**49.5%**
Female	305,084	**51.2%**	2,547,278	**50.5%**	3,329,108	**50.5%**
Total Participation	17,354		92,848		150,367	
Male	13,391	**77%**	76,916	**82.8%**	122,385	**81.4%**
Female	3,963	**23%**	15,932	**17.2%**	27,982	**18.6%**
Participation Rate	2.9%		1.8%		2.3%	
Male	4.6%		3.1%		3.7%	
Female	1.3%		0.6%		0.8%	

Projected Population (2031)

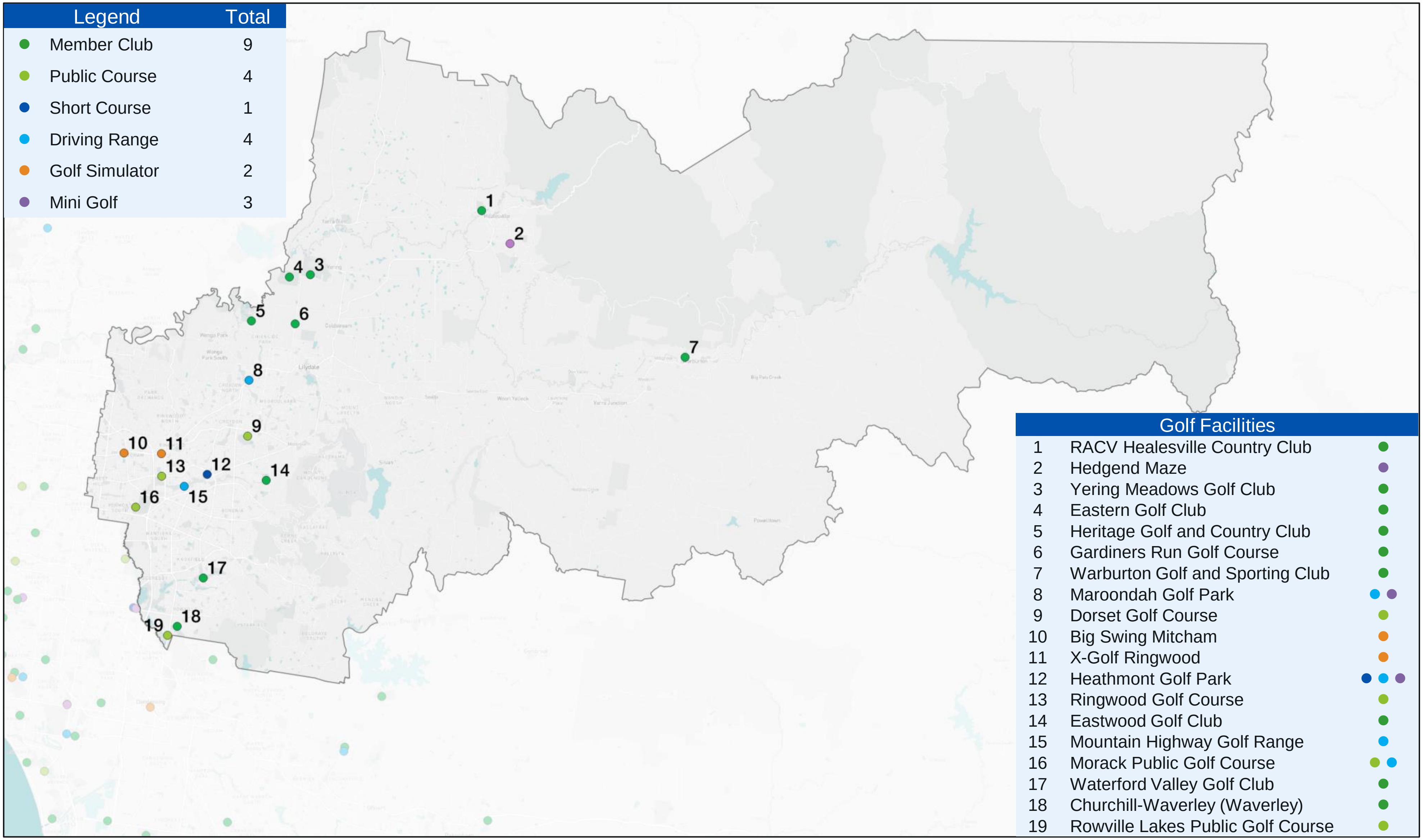
	Male	Female	Total
Projected Population (2031)	348,323	361,602	709,925
Change	57,862	56,518	114,380
Percentage Growth	19.9%	18.5%	19.2%

Population to Participation by Percentage



Male Total Population	Male Total Participation	Male Participation Rate	Age	Female Total Population	Female Total Participation	Female Participation Rate
11,577	1,039	9.0%	**80+**	16,794	432	2.6%
18,203	2,475	13.6%	**70-79**	21,454	1,170	5.5%
25,345	2,669	10.5%	**60-69**	27,949	1,155	4.1%
32,342	2,334	7.2%	**50-59**	34,967	566	1.6%
35,075	1,549	4.4%	**40-49**	37,817	133	0.4%
50,120	1,254	2.5%	**30-39**	50,006	58	0.1%
58,995	891	1.5%	**20-29**	59,687	74	0.1%
31,109	309	1.0%	**10-19**	30,339	51	0.2%
27,695	103	0.4%	**0-9**	26,071	25	0.1%

METRO OUTER EAST – GOLF FACILITIES



Legend	Total
Member Club	9
Public Course	4
Short Course	1
Driving Range	4
Golf Simulator	2
Mini Golf	3

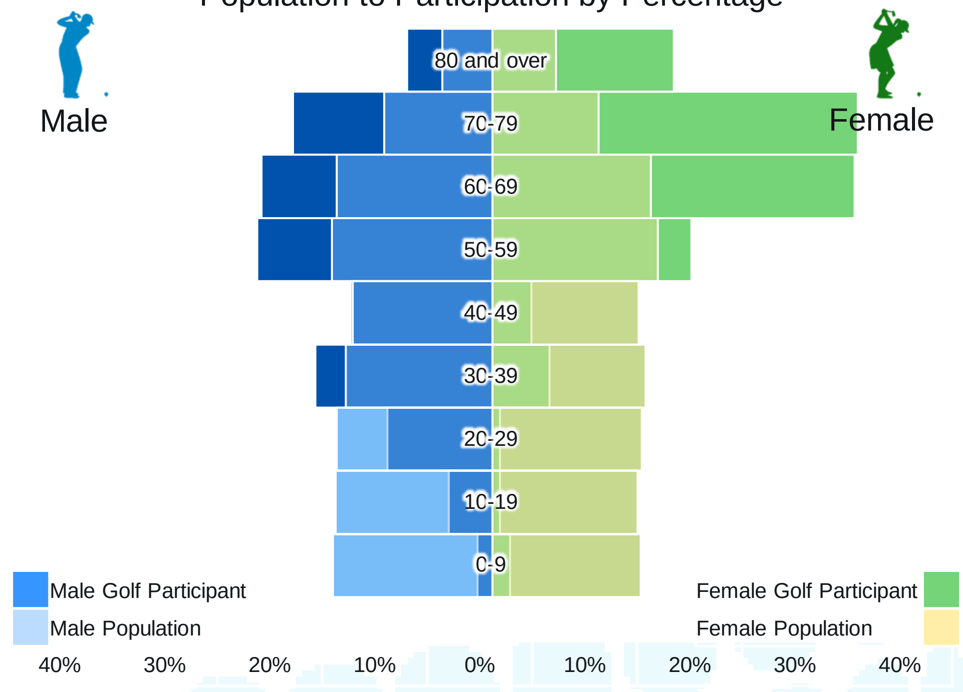
	Golf Facilities	
1	RACV Healesville Country Club	Member Club
2	Hedgend Maze	Mini Golf
3	Yering Meadows Golf Club	Member Club
4	Eastern Golf Club	Member Club
5	Heritage Golf and Country Club	Member Club
6	Gardiners Run Golf Course	Member Club
7	Warburton Golf and Sporting Club	Member Club
8	Maroondah Golf Park	Driving Range, Mini Golf
9	Dorset Golf Course	Public Course
10	Big Swing Mitcham	Golf Simulator
11	X-Golf Ringwood	Golf Simulator
12	Heathmont Golf Park	Short Course, Driving Range, Mini Golf
13	Ringwood Golf Course	Public Course
14	Eastwood Golf Club	Member Club
15	Mountain Highway Golf Range	Driving Range
16	Morack Public Golf Course	Public Course, Driving Range
17	Waterford Valley Golf Club	Member Club
18	Churchill-Waverley (Waverley)	Member Club
19	Rowville Lakes Public Golf Course	Public Course

	Metro Outer East		Metro Melbourne		Victoria	
Total Population	**534,485**		**5,045,764**		**6,596,039**	
Male	263,106	**49.2%**	2,498,486	**49.5%**	3,266,931	**49.5%**
Female	271,379	**50.8%**	2,547,278	**50.5%**	3,329,108	**50.5%**
Total Participation	**9,895**		**92,848**		**150,367**	
Male	8,622	**87%**	76,916	**82.8%**	122,385	**81.4%**
Female	1,273	**13%**	15,932	**17.2%**	27,982	**18.6%**
Participation Rate	**1.9%**		**1.8%**		**2.3%**	
Male	3.3%		3.1%		3.7%	
Female	0.5%		0.6%		0.8%	

Projected Population (2031)

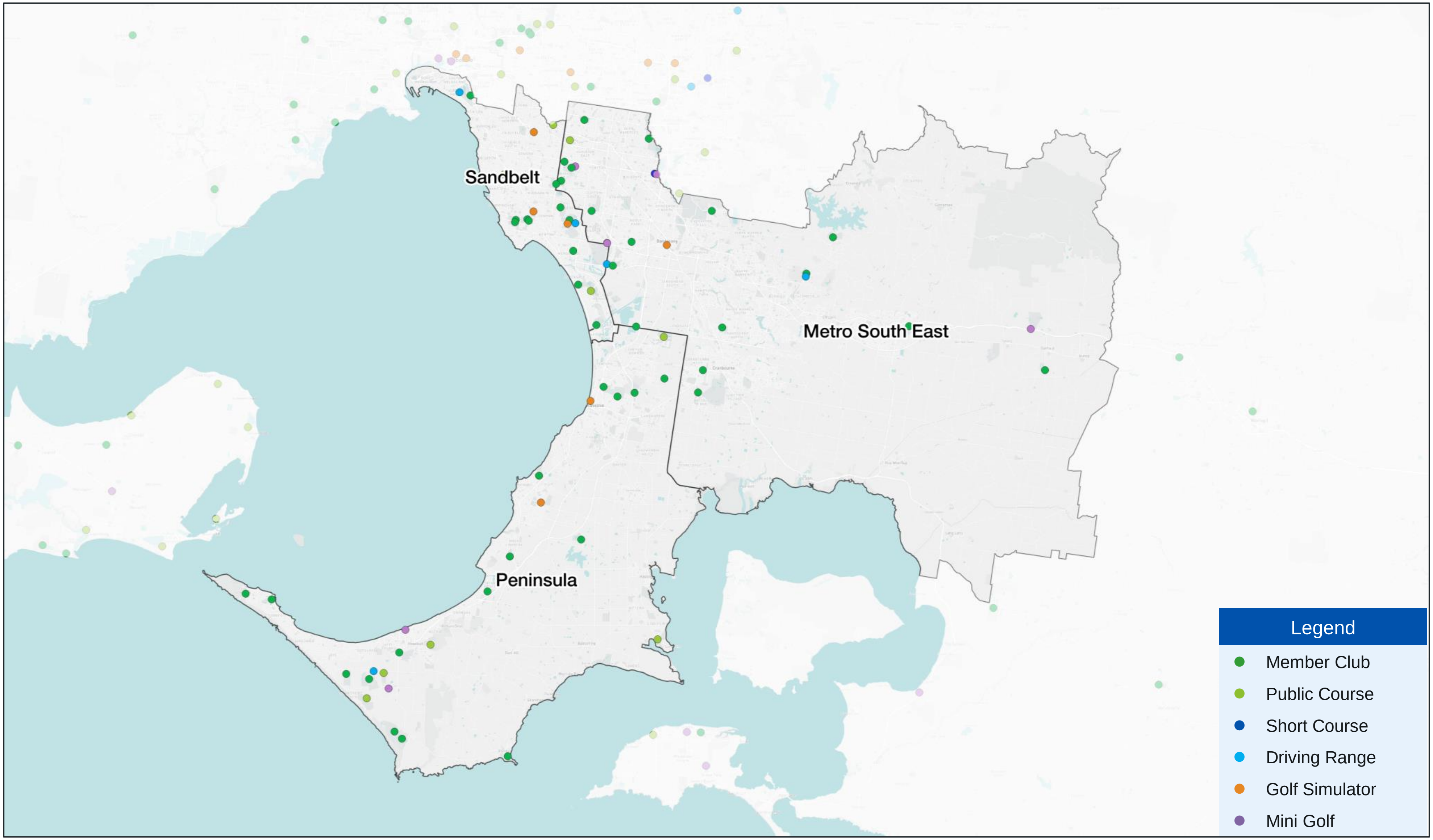
	Male	Female	Total
Projected Population (2031)	293,968	300,601	594,569
Change	30,862	29,222	60,084
Percentage Growth	11.7%	10.8%	11.2%

Population to Participation by Percentage



Male: Total Population	Male: Total Participation	Male: Participation Rate	Age	Female: Total Population	Female: Total Participation	Female: Participation Rate
9,169	396	4.3%	**80+**	13,099	119	0.9%
18,371	1,529	8.3%	**70-79**	20,550	340	1.7%
26,999	1,655	6.1%	**60-69**	29,779	345	1.2%
33,400	1,444	4.3%	**50-59**	35,839	130	0.4%
35,681	1,037	2.9%	**40-49**	37,444	44	0.1%
36,095	846	2.3%	**30-39**	37,702	33	0.1%
36,093	596	1.7%	**20-29**	33,668	39	0.1%
33,630	196	0.6%	**10-19**	31,566	36	0.1%
33,668	81	0.2%	**0-9**	31,732	22	0.1%

METROPOLITAN MELBOURNE SOUTH EAST – CONTEXT MAP



METROPOLITAN MELBOURNE SOUTH EAST – FACILITY PROVISION SUMMARY

Current population and golf facility supply

Total Population	Population Growth (2031)	Member Clubs	Public Courses	Driving Ranges	Simulators	Mini Golf
1,738,092	22.09%	38	16	11	13	7

Current Accessibility and Future Facility Planning Priorities

Facility Type		Drive Time (Mins)	Catchment	% of Population within specified catchment	New facility requirements	Strategic Priorities
Golf Course/ Short Course	Member Club	5	162,575	16%	M	• Maintain current provision.
		10	827,281	81%		
	Public Course	5	118,871	12%		
		10	772,187	75%		
		15	949,804	93%		
Driving Range		5	37,485	4%	↑	• Need for 1 new driving range facility in a strategic location to address accessibility gaps.
		10	672,691	66%		
		15	827,281	81%		
Simulator		15	556,128	54%	↑	• Encourage new simulators as an innovative format and guide provision to supplement driving ranges where space is a constraint.
		20	828,074	81%		
		30	928,530	91%		
Mini Golf		15	652,396	64%	↑	• Up to 60% increase in mini golf facilities (11 new facilities).
		20	941,312	92%		

New Facility Requirements *is based on a ratio of the number of facilities required in 2031 divided by the current number of facilities. The facilities required equation includes variables for population change, facility capacity, current membership and broader consumer demand for each type of facility.*

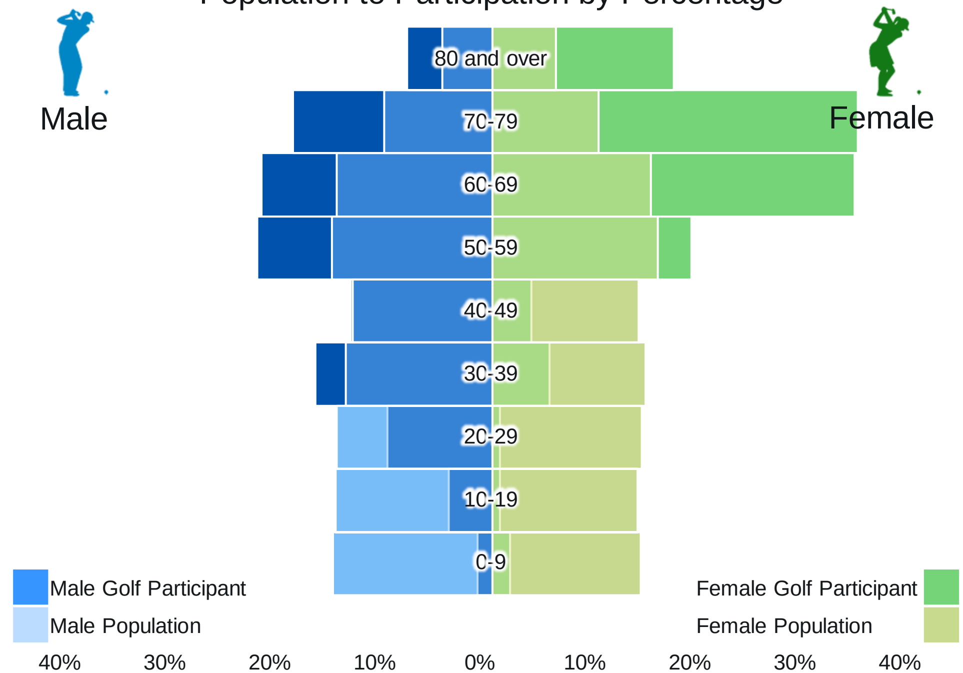
METRO SOUTH EAST – MEMBERSHIP

	Metro South East		Metro Melbourne		Victoria	
Total Population	**866,324**		**5,045,764**		**6,596,039**	
Male	436,061	**50.3%**	2,498,486	**49.5%**	3,266,931	**49.5%**
Female	430,263	**49.7%**	2,547,278	**50.5%**	3,329,108	**50.5%**
Total Participation	**11,045**		**92,848**		**150,367**	
Male	9,588	**87%**	76,916	**82.8%**	122,385	**81.4%**
Female	1,457	**13%**	15,932	**17.2%**	27,982	**18.6%**
Participation Rate	**1.3%**		**1.8%**		**2.3%**	
Male	2.2%		3.1%		3.7%	
Female	0.3%		0.6%		0.8%	

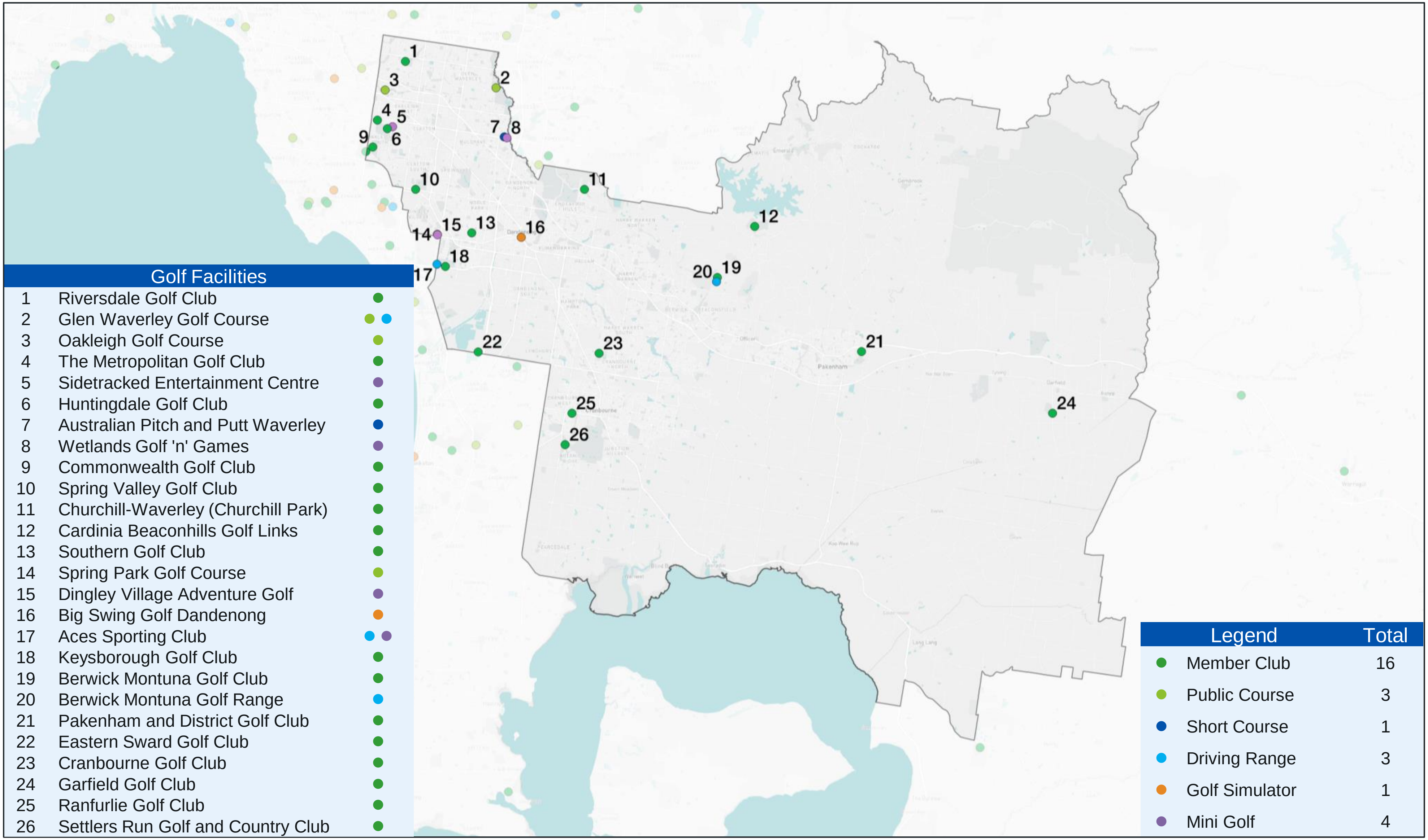
Projected Population (2031)

	Male	Female	Total
Projected Population (2031)	560,228	556,432	1,116,660
Change	124,167	126,169	250,336
Percentage Growth	28.5%	29.3%	28.9%

Population to Participation by Percentage



Male				Female		
Total Population	Total Participation	Participation Rate	Age	Total Population	Total Participation	Participation Rate
12,838	477	3.7%	**80+**	17,242	159	0.9%
23,584	1,285	5.4%	**70-79**	25,917	291	1.1%
35,294	1,630	4.6%	**60-69**	37,449	332	0.9%
46,936	1,715	3.7%	**50-59**	47,817	199	0.4%
55,243	1,256	2.3%	**40-49**	55,452	100	0.2%
68,422	1,050	1.5%	**30-39**	67,813	84	0.1%
76,108	704	0.9%	**20-29**	68,886	57	0.1%
56,191	242	0.4%	**10-19**	52,307	62	0.1%
61,445	75	0.1%	**0-9**	57,380	14	0.0%



Golf Facilities		
1	Riversdale Golf Club	● (Member Club)
2	Glen Waverley Golf Course	● ● (Public Course, Driving Range)
3	Oakleigh Golf Course	● (Public Course)
4	The Metropolitan Golf Club	● (Member Club)
5	Sidetracked Entertainment Centre	● (Mini Golf)
6	Huntingdale Golf Club	● (Member Club)
7	Australian Pitch and Putt Waverley	● (Short Course)
8	Wetlands Golf 'n' Games	● (Mini Golf)
9	Commonwealth Golf Club	● (Member Club)
10	Spring Valley Golf Club	● (Member Club)
11	Churchill-Waverley (Churchill Park)	● (Member Club)
12	Cardinia Beaconhills Golf Links	● (Member Club)
13	Southern Golf Club	● (Member Club)
14	Spring Park Golf Course	● (Public Course)
15	Dingley Village Adventure Golf	● (Mini Golf)
16	Big Swing Golf Dandenong	● (Golf Simulator)
17	Aces Sporting Club	● ● (Driving Range, Mini Golf)
18	Keysborough Golf Club	● (Member Club)
19	Berwick Montuna Golf Club	● (Member Club)
20	Berwick Montuna Golf Range	● (Driving Range)
21	Pakenham and District Golf Club	● (Member Club)
22	Eastern Sward Golf Club	● (Member Club)
23	Cranbourne Golf Club	● (Member Club)
24	Garfield Golf Club	● (Member Club)
25	Ranfurlie Golf Club	● (Member Club)
26	Settlers Run Golf and Country Club	● (Member Club)

Legend	Total
Member Club	16
Public Course	3
Short Course	1
Driving Range	3
Golf Simulator	1
Mini Golf	4

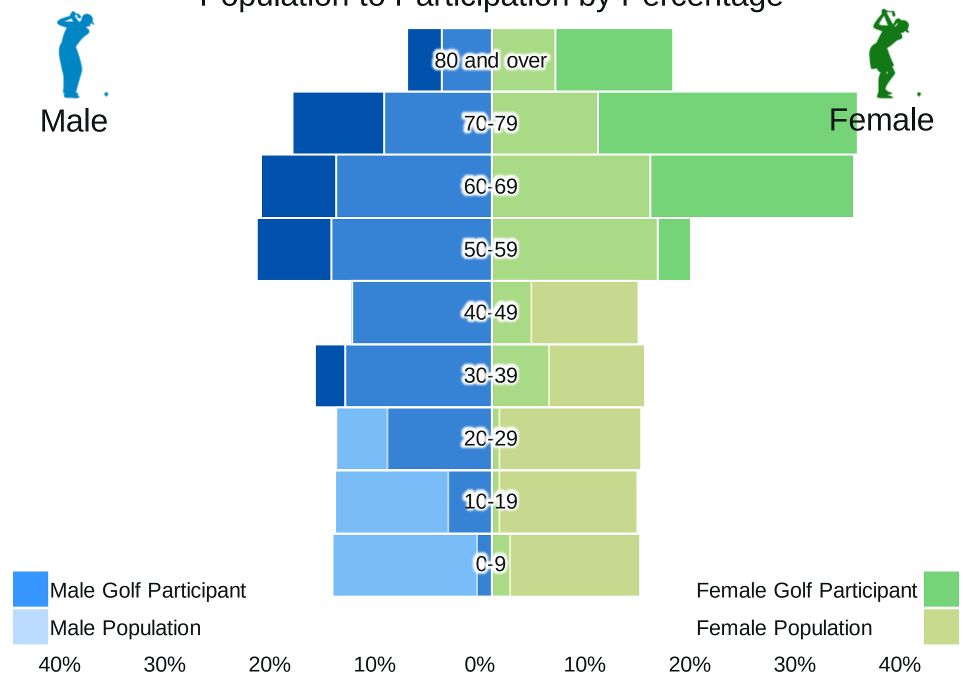
SANDBELT – MEMBERSHIP

	Sandbelt		Metro Melbourne		Victoria	
Total Population	**561,489**		**5,045,764**		**6,596,039**	
Male	272,748	**48.6%**	2,498,486	**49.5%**	3,266,931	**49.5%**
Female	288,741	**51.4%**	2,547,278	**50.5%**	3,329,108	**50.5%**
Total Participation	**18,554**		**92,848**		**150,367**	
Male	14,633	**79%**	76,916	**82.8%**	122,385	**81.4%**
Female	3,921	**21%**	15,932	**17.2%**	27,982	**18.6%**
Participation Rate	**3.3%**		**1.8%**		**2.3%**	
Male	5.4%		3.1%		3.7%	
Female	1.4%		0.6%		0.8%	

Projected Population (2031)

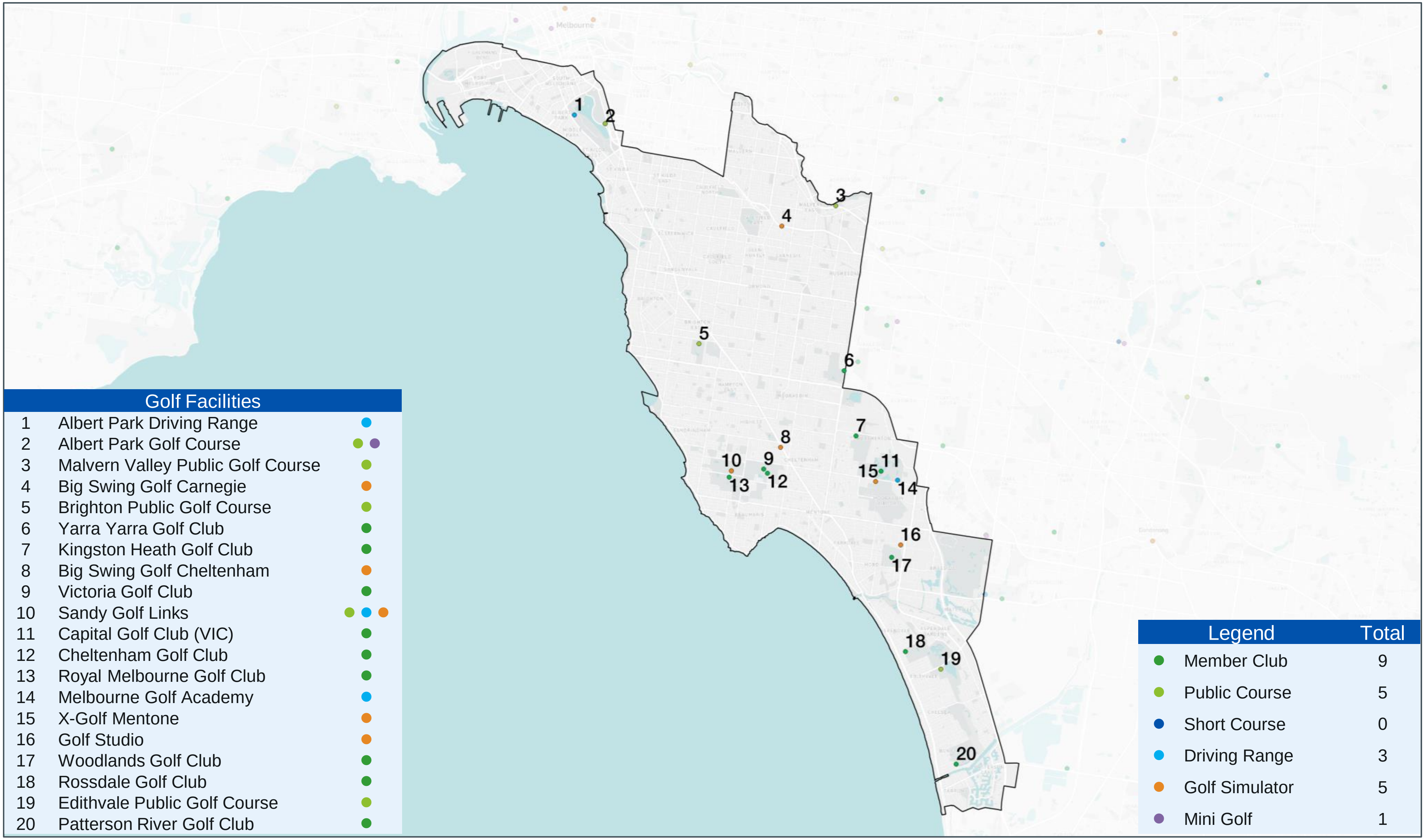
	Male	Female	Total
Projected Population (2031)	322,738	334,407	657,145
Change	49,990	45,666	95,656
Percentage Growth	18.3%	15.8%	17.0%

Population to Participation by Percentage



Male				Female		
Total Population	Total Participation	Participation Rate	Age	Total Population	Total Participation	Participation Rate
10,060	844	8.4%	**80+**	15,538	461	3.0%
17,308	2,372	13.7%	**70-79**	19,649	1,096	5.6%
26,034	2,900	11.1%	**60-69**	27,788	1,136	4.1%
34,171	2,734	8.0%	**50-59**	36,227	596	1.6%
38,228	2,095	5.5%	**40-49**	41,342	132	0.3%
42,850	1,472	3.4%	**30-39**	45,400	69	0.2%
41,690	932	2.2%	**20-29**	42,856	83	0.2%
31,311	334	1.1%	**10-19**	30,065	79	0.3%
31,096	121	0.4%	**0-9**	29,876	36	0.1%

GolfAustralia



Golf Facilities

1	Albert Park Driving Range
2	Albert Park Golf Course
3	Malvern Valley Public Golf Course
4	Big Swing Golf Carnegie
5	Brighton Public Golf Course
6	Yarra Yarra Golf Club
7	Kingston Heath Golf Club
8	Big Swing Golf Cheltenham
9	Victoria Golf Club
10	Sandy Golf Links
11	Capital Golf Club (VIC)
12	Cheltenham Golf Club
13	Royal Melbourne Golf Club
14	Melbourne Golf Academy
15	X-Golf Mentone
16	Golf Studio
17	Woodlands Golf Club
18	Rossdale Golf Club
19	Edithvale Public Golf Course
20	Patterson River Golf Club

Legend	Total
Member Club	9
Public Course	5
Short Course	0
Driving Range	3
Golf Simulator	5
Mini Golf	1

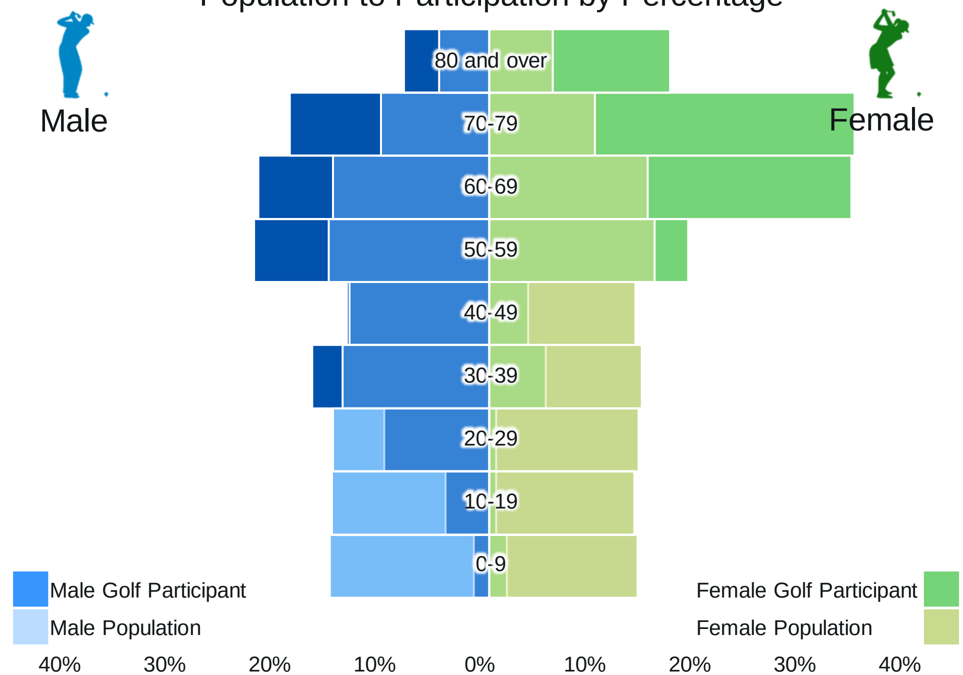
PENINSULA – MEMBERSHIP

	Peninsula		Metro Melbourne		Victoria	
Total Population	**310,279**		**5,045,764**		**6,596,039**	
Male	151,571	**48.8%**	2,498,486	**49.5%**	3,266,931	**49.5%**
Female	158,708	**51.2%**	2,547,278	**50.5%**	3,329,108	**50.5%**
Total Participation	**13,443**		**92,848**		**150,367**	
Male	10,783	**80%**	76,916	**82.8%**	122,385	**81.4%**
Female	2,660	**20%**	15,932	**17.2%**	27,982	**18.6%**
Participation Rate	**4.3%**		**1.8%**		**2.3%**	
Male	7.1%		3.1%		3.7%	
Female	1.7%		0.6%		0.8%	

Projected Population (2031)

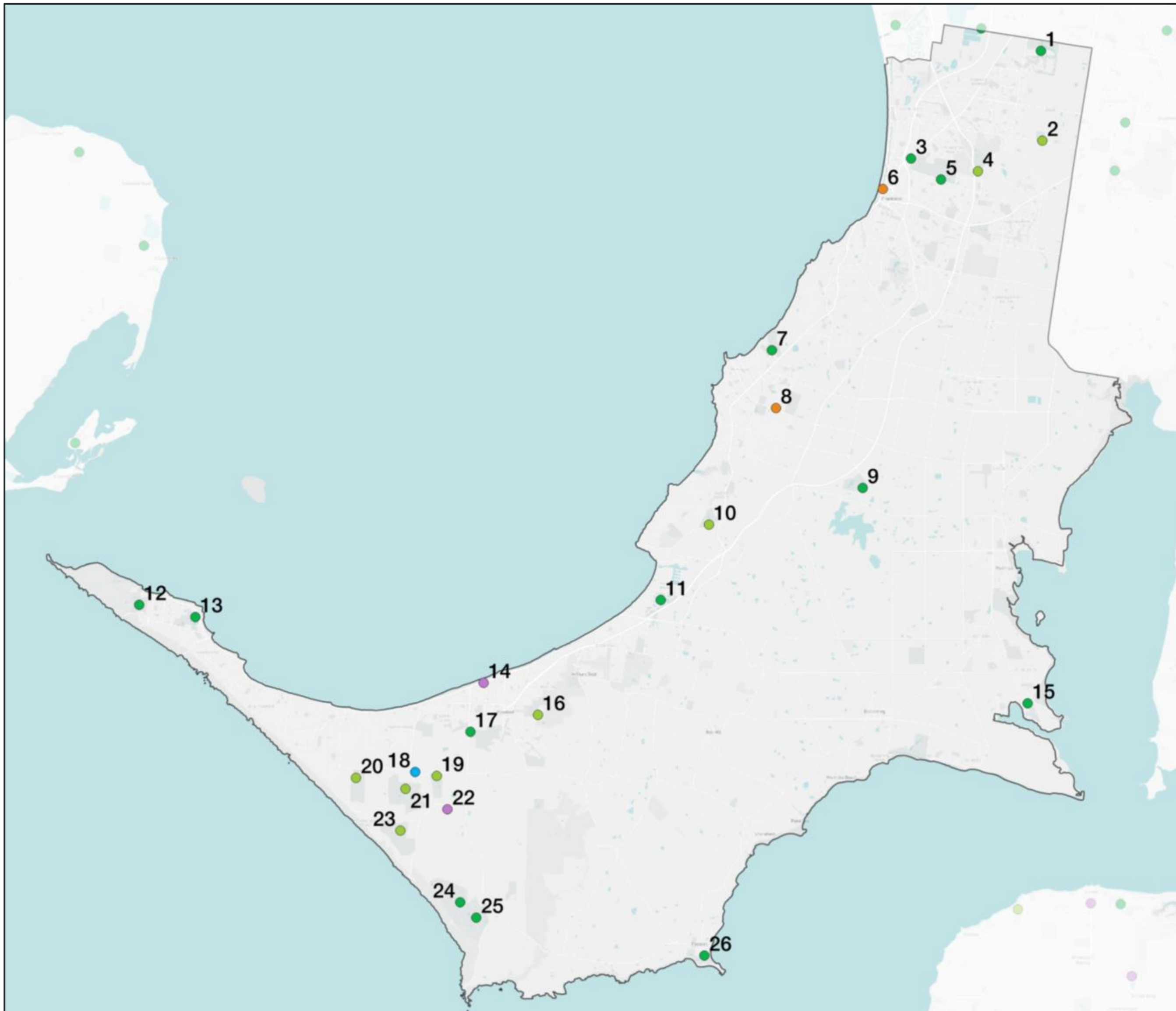
	Male	Female	Total
Projected Population (2031)	170,800	177,399	348,199
Change	19,229	18,691	37,920
Percentage Growth	12.7%	11.8%	12.2%

Population to Participation by Percentage



Male				Female		
Total Population	Total Participation	Participation Rate	Age	Total Population	Total Participation	Participation Rate
7,335	731	10.0%	**80+**	9,699	282	2.9%
13,758	2,210	16.1%	**70-79**	15,584	763	4.9%
17,490	2,066	11.8%	**60-69**	19,664	823	4.2%
19,352	1,502	7.8%	**50-59**	20,917	278	1.3%
19,998	1,083	5.4%	**40-49**	20,949	58	0.3%
17,821	864	4.8%	**30-39**	19,397	45	0.2%
18,307	717	3.9%	**20-29**	16,919	48	0.3%
18,612	363	2.0%	**10-19**	17,543	74	0.4%
18,898	526	2.8%	**0-9**	18,036	171	0.9%

PENINSULA – GOLF FACILITIES



Legend	Total
Member Club	13
Public Course	8
Short Course	0
Driving Range	5
Golf Simulator	2
Mini Golf	2

Golf Facilities	
1	Sandhurst Club
2	Skye Public Golf Course
3	The National Golf Club at Long Island
4	Centenary Park Golf Course
5	Peninsula Kingswood Country Golf Club
6	Big Swing Golf Frankston
7	Mornington Golf Club
8	X-Golf Mornington
9	Devilbend Golf Club
10	Mount Martha Public Golf Course
11	The Valley Golf Sport & Leisure
12	Portsea Golf Club
13	Sorrento Golf Club
14	Top Fun Family Fun Centre
15	Cerberus Golf Club
16	Bay Views Golf Course
17	Rosebud Country Club
18	Truemans Road Golf Range
19	Eagle Ridge Golf Course
20	The Dunes Golf Links
21	Moonah Links
22	Boneo Maze and Mini Golf
23	St Andrews Beach
24	The National Golf Club
25	RACV Cape Schanck
26	Flinders Golf Club

REGIONAL VICTORIA SUMMARY – MEMBERSHIP

	Regional Victoria		Victoria	
Total Population	**1,550,081**		**6,596,039**	
Male	768,351	**49.6%**	3,266,931	**49.5%**
Female	781,730	**50.4%**	3,329,108	**50.5%**

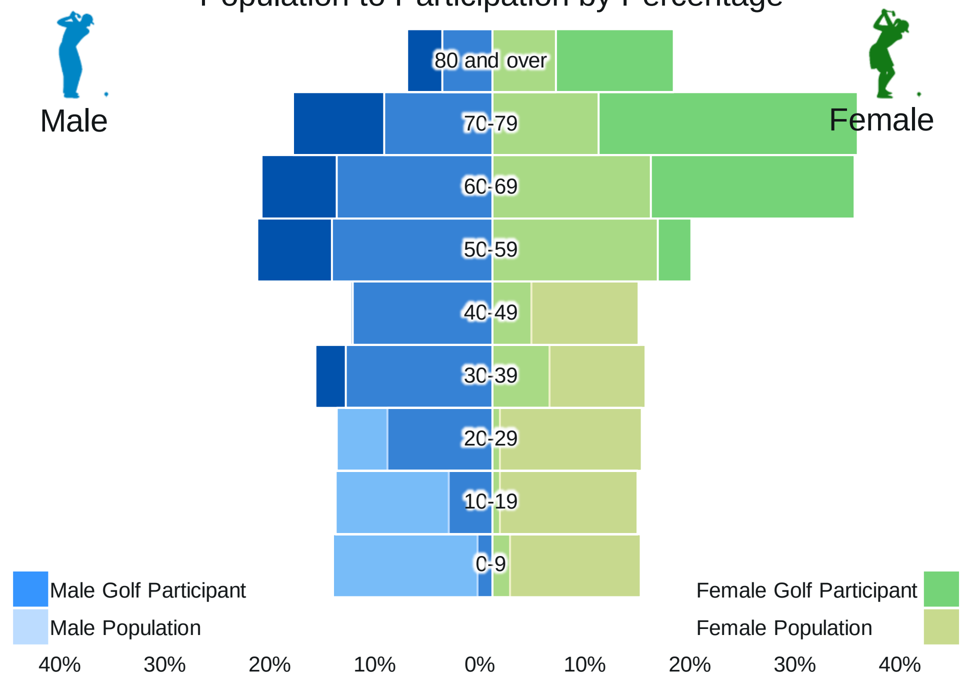
Total Participation	**57,494**		**150,367**	
Male	45,449	**79.0%**	122,385	**81.4%**
Female	12,045	**21.0%**	27,982	**18.6%**

Participation Rate	**3.7%**	**2.3%**
Male	5.9%	3.7%
Female	1.5%	0.8%

Projected Population (2031)

	Male	Female	Total
Projected Population (2031)	882,127	904,435	1,786,562
Change	113,776	122,705	236,481
Percentage Growth	14.8%	15.7%	15.3%

Population to Participation by Percentage



Male				Female		
Total Population	Total Participation	Participation Rate	Age	Total Population	Total Participation	Participation Rate
33,377	1,811	5.4%	**80+**	45,378	832	1.8%
70,077	5,420	7.7%	**70-79**	71,311	2,382	3.3%
99,086	6,556	6.6%	**60-69**	102,602	2,689	2.6%
99,631	4,944	5.0%	**50-59**	105,156	1,283	1.2%
91,566	4,151	4.5%	**40-49**	95,491	385	0.4%
85,850	4,003	4.7%	**30-39**	91,234	333	0.4%
93,928	3,165	3.4%	**20-29**	87,019	185	0.2%
98,316	1,632	1.7%	**10-19**	92,150	195	0.2%
96,520	510	0.5%	**0-9**	91,389	138	0.2%

REGIONAL VICTORIA – FACILITY PROVISION SUMMARY

GolfAustralia

Current population and golf facility supply

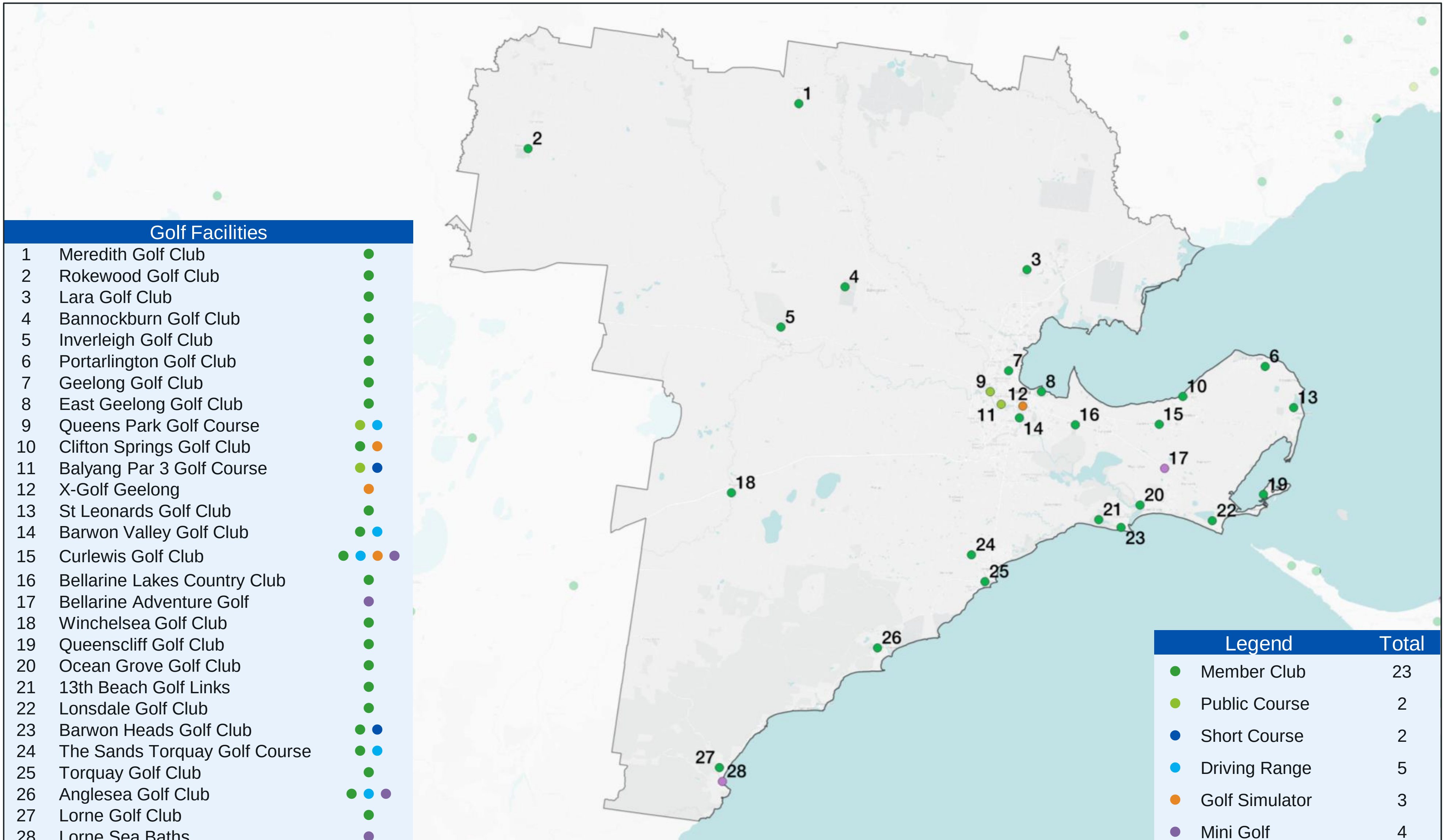
Total Population	Population Growth (2031)	Member Clubs	Public Courses	Driving Ranges	Simulators	Mini Golf
1,738,092	22.09%	211	3	11	11	19

Current Accessibility and Future Facility Planning Priorities

Facility Type		Drive Time (Mins)	Catchment	% of Population within specified catchment	New facility requirements	Strategic Priorities
Golf Course/ Short Course	Member Club	5	162,575	16%	M	• Maintain current provision.
		10	827,281	81%		
	Public Course	5	118,871	12%		
		10	772,187	75%		
		15	949,804	93%		
Driving Range		5	37,485	4%	M	• Maintain current provision.
		10	672,691	66%		
		15	827,281	81%		
Simulator		15	556,128	54%	↑	• Encourage new simulators as an innovative format and guide provision to supplement driving ranges where space is a constraint.
		20	828,074	81%		
		30	928,530	91%		
Mini Golf		15	652,396	64%	M	• Maintain current provision.
		20	941,312	92%		

***New Facility Requirements** is based on a ratio of the number of facilities required in 2031 divided by the current number of facilities. The facilities required equation includes variables for population change, facility capacity, current membership and broader consumer demand for each type of facility.*

BARWON – GOLF FACILITIES



Golf Facilities

1	Meredith Golf Club	Member Club
2	Rokewood Golf Club	Member Club
3	Lara Golf Club	Member Club
4	Bannockburn Golf Club	Member Club
5	Inverleigh Golf Club	Member Club
6	Portarlington Golf Club	Member Club
7	Geelong Golf Club	Member Club
8	East Geelong Golf Club	Member Club
9	Queens Park Golf Course	Public Course, Driving Range
10	Clifton Springs Golf Club	Member Club, Golf Simulator
11	Balyang Par 3 Golf Course	Public Course, Short Course
12	X-Golf Geelong	Golf Simulator
13	St Leonards Golf Club	Member Club
14	Barwon Valley Golf Club	Member Club, Driving Range
15	Curlewis Golf Club	Member Club, Driving Range, Golf Simulator, Mini Golf
16	Bellarine Lakes Country Club	Member Club
17	Bellarine Adventure Golf	Mini Golf
18	Winchelsea Golf Club	Member Club
19	Queenscliff Golf Club	Member Club
20	Ocean Grove Golf Club	Member Club
21	13th Beach Golf Links	Member Club
22	Lonsdale Golf Club	Member Club
23	Barwon Heads Golf Club	Member Club, Short Course
24	The Sands Torquay Golf Course	Member Club, Driving Range
25	Torquay Golf Club	Member Club
26	Anglesea Golf Club	Member Club, Driving Range, Mini Golf
27	Lorne Golf Club	Member Club
28	Lorne Sea Baths	Mini Golf

Legend	Total
Member Club	23
Public Course	2
Short Course	2
Driving Range	5
Golf Simulator	3
Mini Golf	4

BARWON – FACILITY PROVISION SUMMARY

GolfAustralia

Current population and golf facility supply

Total Population	Population Growth (2031)	Member Clubs	Public Courses	Driving Ranges	Simulators	Mini Golf
310,128	28.03%	23	2	5	5	4

Current Accessibility and Future Facility Planning Priorities

Facility Type		Drive Time (Mins)	Catchment	% of Population within specified catchment	New facility requirements	Strategic Priorities
Golf Course/ Short Course	Member Club	5	89,197	32%	M	• Maintain current provision.
		10	246,956	88%		
	Public Course	5	85,429	31%		
		10	238,643	86%		
		15	269,739	97%		
Driving Range		5	23,908	9%	M	• Maintain current provision.
		10	213,468	76%		
		15	246,956	88%		
Simulator		15	109,587	39%	↑	• Encourage new simulators as an innovative format and guide provision to supplement driving ranges where space is a constraint.
		20	189,844	68%		
		30	217,151	78%		
Mini Golf		15	68,262	24%	M	• Maintain current provision.
		20	106,379	38%		

New Facility Requirements *is based on a ratio of the number of facilities required in 2031 divided by the current number of facilities. The facilities required equation includes variables for population change, facility capacity, current membership and broader consumer demand for each type of facility.*

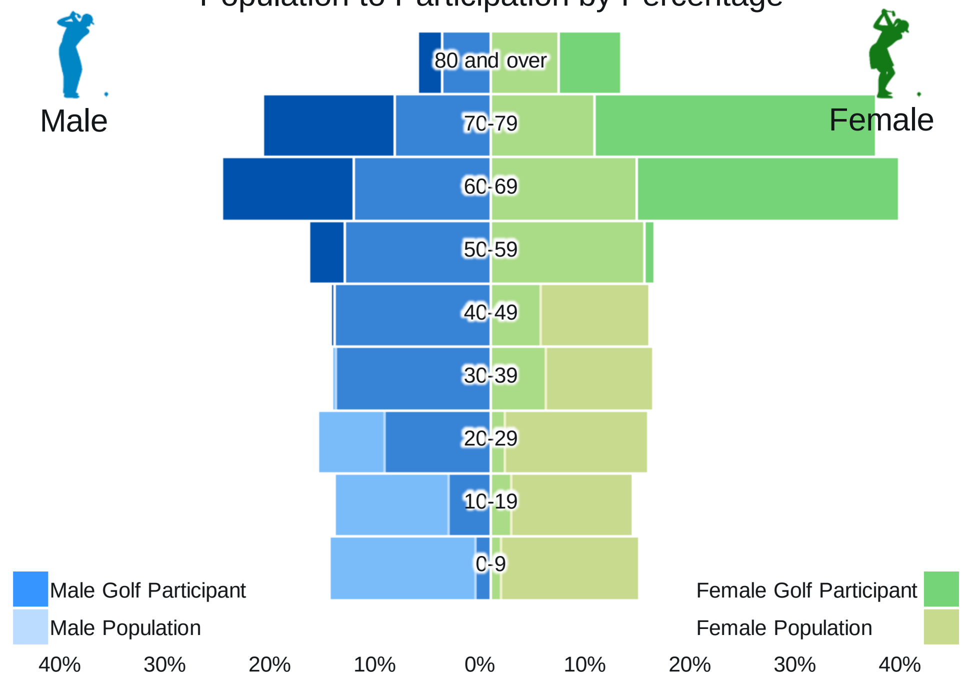
BARWON – MEMBERSHIP

	Barwon		Regional Victoria		Victoria	
Total Population	**310,128**		**1,550,081**		**6,596,039**	
Male	152,557	**49.2%**	768,351	**49.6%**	3,266,931	**49.5%**
Female	157,571	**50.8%**	781,730	**50.4%**	3,329,108	**50.5%**
Total Participation	**13,360**		**57,494**		**150,367**	
Male	10,625	**80%**	45,449	**79.0%**	122,385	**81.4%**
Female	2,735	**20%**	12,045	**21.0%**	27,982	**18.6%**
Participation Rate	**4.3%**		**3.7%**		**2.3%**	
Male	7.0%		5.9%		3.7%	
Female	1.7%		1.5%		0.8%	

Projected Population (2031)

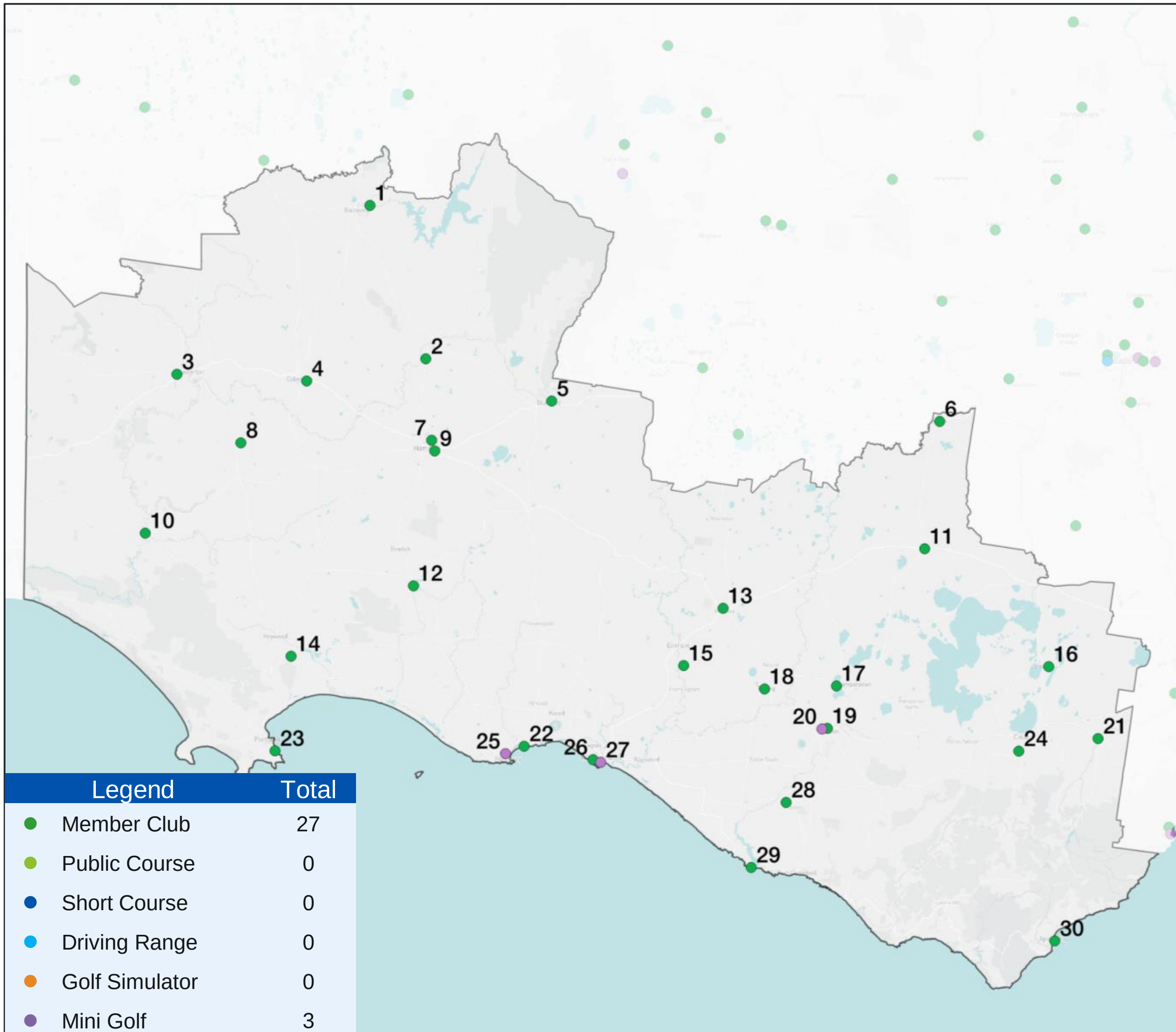
	Male	Female	Total
Projected Population (2031)	194,797	202,250	397,047
Change	42,240	44,679	86,919
Percentage Growth	27.7%	28.4%	28.0%

Population to Participation by Percentage



Male Total Population	Male Total Participation	Male Participation Rate	Age	Female Total Population	Female Total Participation	Female Participation Rate
6,013	558	9.3%	**80+**	8,649	258	3.0%
11,851	1,732	14.6%	**70-79**	13,108	762	5.8%
17,013	2,045	12.0%	**60-69**	18,508	807	4.4%
18,066	1,387	7.7%	**50-59**	19,548	324	1.7%
19,318	1,224	6.3%	**40-49**	20,148	98	0.5%
19,624	1,177	6.0%	**30-39**	20,636	107	0.5%
21,406	807	3.8%	**20-29**	19,978	27	0.1%
19,301	328	1.7%	**10-19**	18,143	40	0.2%
19,965	121	0.6%	**0-9**	18,853	20	0.1%

GolfAustralia



Golf Facilities		
1	Balmoral Golf Club	●
2	Mooralla Golf Club	●
3	Casterton Golf Club	●
4	Coleraine Golf Club	●
5	Grampians Golf Club	●
6	Skipton Golf Club	●
7	Parklands Golf Club	●
8	Merino Golf Club	●
9	Hamilton Golf Club	●
10	Dartmoor Golf Club	●
11	Lismore Golf Club	●
12	MacArthur Golf Club	●
13	Mortlake Golf Club	●
14	Heywood Golf Club	●
15	East Framlingham Golf Club	●
16	Beeac Golf Club	●
17	Camperdown Golf Club	●
18	Terang Golf Club	●
19	Cobden Golf Club	●
20	Cobden Miniature Railway & Mini Golf Park	●
21	Birregurra Golf Club	●
22	Port Fairy Golf Club	●
23	Portland Golf Club	●
24	Colac Golf Club	●
25	Port Fairy Mini Golf	●
26	Warrnambool Golf Club	●
27	Warrnambool Mini Golf By The Sea	●
28	Timboon Golf Club	●
29	Peterborough Golf Club	●
30	Apollo Bay Golf Club	●

Legend	Total
Member Club	27
Public Course	0
Short Course	0
Driving Range	0
Golf Simulator	0
Mini Golf	3

WEST COAST – FACILITY PROVISION SUMMARY

Current population and golf facility supply

Total Population	Population Growth (2031)	Member Clubs	Public Courses	Driving Ranges	Simulators	Mini Golf
125,360	2.86%	27	0	0	0	3

Current Accessibility and Future Facility Planning Priorities

Facility Type		Drive Time (Mins)	Catchment	% of Population within specified catchment	New facility requirements	Strategic Priorities
Golf Course/ Short Course	Member Club	5	22,990	19%	M	• Maintain current provision.
		10	62,662	51%		
	Public Course	5	20,059	16%		
		10	61,936	51%		
		15	93,916	77%		
Driving Range		5	0	0%	M	• Maintain current provision.
		10	0	0%		
		15	62,662	51%		
Simulator		15	0	0%	↑	• Encourage new simulators as an innovative format and guide provision to supplement driving ranges where space is a constraint.
		20	0	0%		
		30	0	0%		
Mini Golf		15	40,941	33%	M	• Maintain current provision.
		20	49,321	40%		

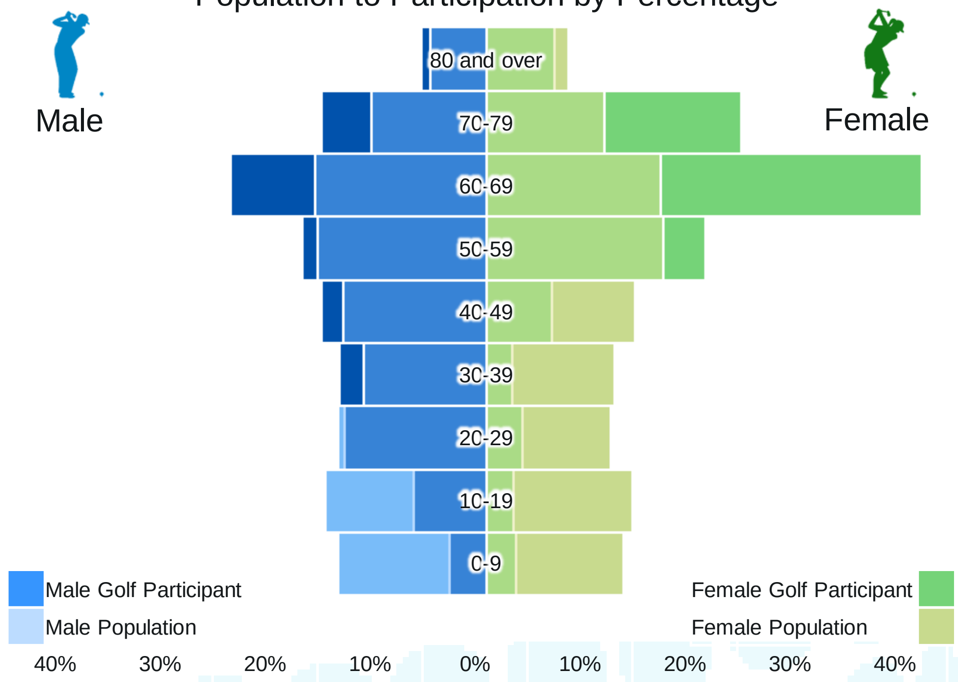
New Facility Requirements *is based on a ratio of the number of facilities required in 2031 divided by the current number of facilities. The facilities required equation includes variables for population change, facility capacity, current membership and broader consumer demand for each type of facility.*

	West Coast		Regional Victoria		Victoria	
Total Population	**125,360**		**1,550,081**		**6,596,039**	
Male	62,396	**49.8%**	768,351	**49.6%**	3,266,931	**49.5%**
Female	62,964	**50.2%**	781,730	**50.4%**	3,329,108	**50.5%**
Total Participation	**4,829**		**57,494**		**150,367**	
Male	3,634	**75%**	45,449	**79.0%**	122,385	**81.4%**
Female	1,195	**25%**	12,045	**21.0%**	27,982	**18.6%**
Participation Rate	**3.9%**		**3.7%**		**2.3%**	
Male	5.8%		5.9%		3.7%	
Female	1.9%		1.5%		0.8%	

Projected Population (2031)

	Male	Female	Total
Projected Population (2031)	63,482	65,465	128,947
Change	1,086	2,501	3,587
Percentage Growth	1.7%	4.0%	2.9%

Population to Participation by Percentage

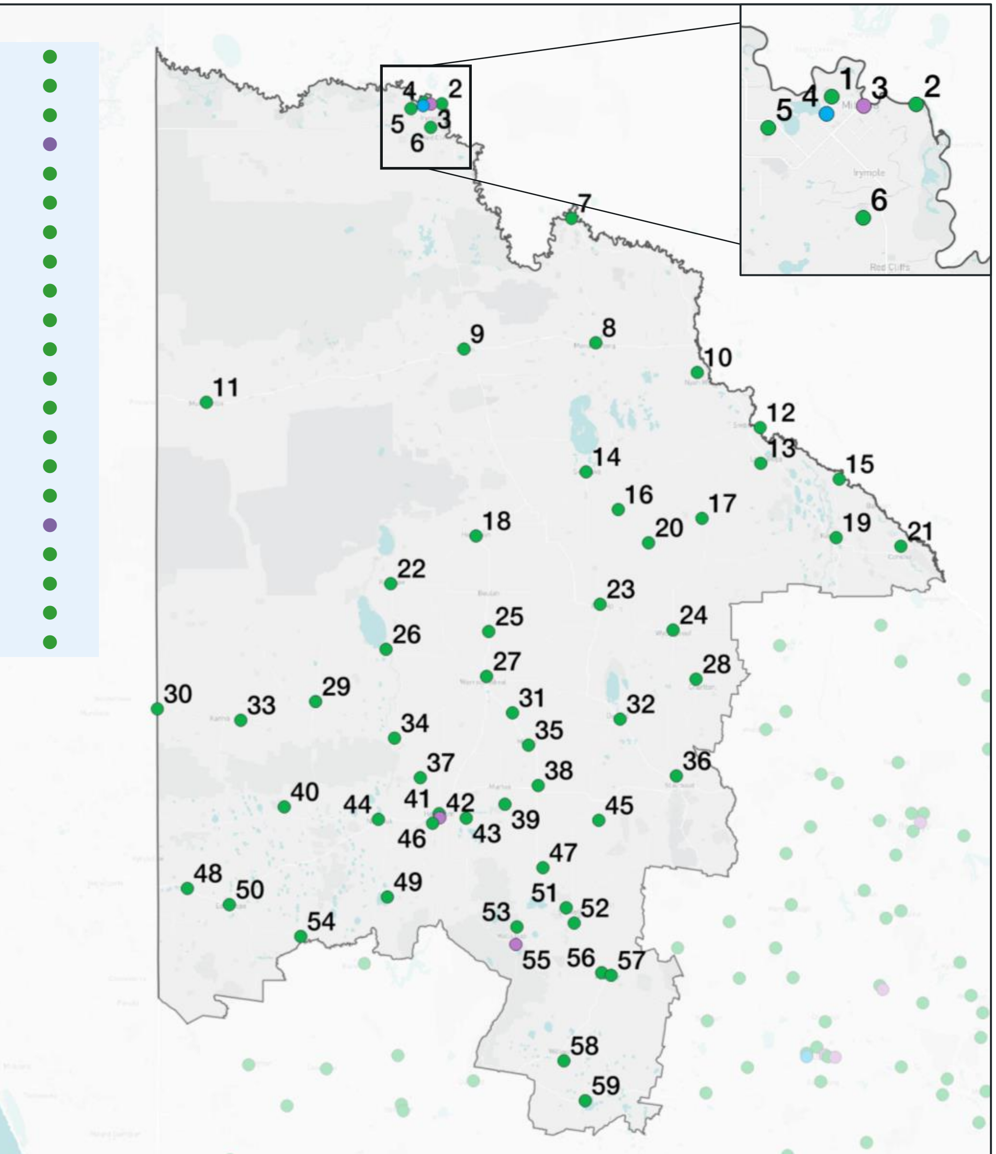


Male				Female		
Total Population	Total Participation	Participation Rate	Age	Total Population	Total Participation	Participation Rate
2,816	99	3.5%	**80+**	4,173	32	0.8%
5,789	250	4.3%	**70-79**	5,988	120	2.0%
8,656	388	4.5%	**60-69**	8,858	238	2.7%
8,549	278	3.3%	**50-59**	9,009	103	1.1%
7,258	250	3.4%	**40-49**	7,601	31	0.4%
6,227	223	3.6%	**30-39**	6,517	12	0.2%
7,489	215	2.9%	**20-29**	6,365	17	0.3%
8,109	111	1.4%	**10-19**	7,455	13	0.2%
7,503	56	0.7%	**0-9**	6,998	14	0.2%

WIMMERA-MALLEE – GOLF FACILITIES

Golf Facilities		
1	Mildura Golf Club	●
2	Riverside Golf Club	●
3	Putt Putt Mildura	●
4	Sunraysia Golf Range	●
5	Merbein Golf Club	●
6	Red Cliffs Golf Club	●
7	Robinvale Golf Club	●
8	Manangatang Golf Club	●
9	Ouyen Golf Club	●
10	Nyah West Golf Club	●
11	Murrayville Golf Club	●
12	Murray Downs Golf & Country Club	●
13	Lakeside Golf Club - Lake Boga	●
14	Sea Lake Golf Club	●
15	Murrabit Golf Club	●
16	Berriwillock Golf Club	●
17	Lalbert Golf Club	●
18	Hopetoun Golf Club	●
19	Kerang Golf Club	●
20	Culgoa Golf Club	●
21	Cohuna Golf Club	●
22	Rainbow Golf Club	●
23	Birchip Golf Club	●
24	Wycheproof Golf Club	●
25	Brim Golf Club	●
26	Jeparit Golf Club	●
27	Warracknabeal Golf Club	●
28	Charlton Golf Club	●
29	Nhill Golf Club	●
30	Serviceton Golf Club	●
31	Sheep Hills Golf Club	●
32	Donald Golf Club	●
33	Kaniva Golf Club	●
34	Dimboola Golf Club	●
35	Minyip Golf Club	●
36	St Arnaud Country Golf Club	●
37	Pimpinio Golf Club	●
38	Rupanyup Golf Club	●
39	Murtoa Golf Club	●
40	Goroke Golf Club	●
41	Moor Park Golf Club	●
42	Stone Forest Adventure	●
43	Drung Golf Club	●
44	Natimuk Golf Club	●
45	Wallaloo Golf Club	●
46	Horsham Golf Club	●
47	Glenorchy Golf Club	●
48	Apsley Golf Club	●
49	Toolondo Golf Club	●
50	Edenhope Golf Club	●
51	Stawell Golf Club	●
52	Grange Golf Club	●
53	Halls Gap Golf Club	●
54	Harrow Golf Club	●
55	Grampians Adventure Golf	●
56	Chalambar Golf Club	●
57	Aradale Golf Club	●
58	Willaura Golf Club	●
59	Lake Bolac Golf Club	●

	Legend	Total
●	Member Club	55
●	Public Course	0
●	Short Course	0
●	Driving Range	1
●	Golf Simulator	0
●	Mini Golf	3



WIMMERA-MALLEE – FACILITY PROVISION SUMMARY

Current population and golf facility supply

Total Population	Population Growth (2031)	Member Clubs	Public Courses	Driving Ranges	Simulators	Mini Golf
152,106	0.84%	55	0	1	1	3

Current Accessibility and Future Facility Planning Priorities

Facility Type		Drive Time (Mins)	Catchment	% of Population within specified catchment	New facility requirements	Strategic Priorities
Golf Course/ Short Course	Member Club	5	30,112	20%	M	• Maintain current provision.
		10	99,934	67%		
	Public Course	5	14,338	10%		
		10	52,913	35%		
		15	67,151	45%		
Driving Range		5	5,993	4%	M	• Maintain current provision.
		10	38,736	26%		
		15	99,934	67%		
Simulator		15	0	0%	↑	• Encourage new simulators as an innovative format and guide provision to supplement driving ranges where space is a constraint.
		20	0	0%		
		30	0	0%		
Mini Golf		15	54,779	37%	M	• Maintain current provision.
		20	61,283	41%		

New Facility Requirements *is based on a ratio of the number of facilities required in 2031 divided by the current number of facilities. The facilities required equation includes variables for population change, facility capacity, current membership and broader consumer demand for each type of facility.*

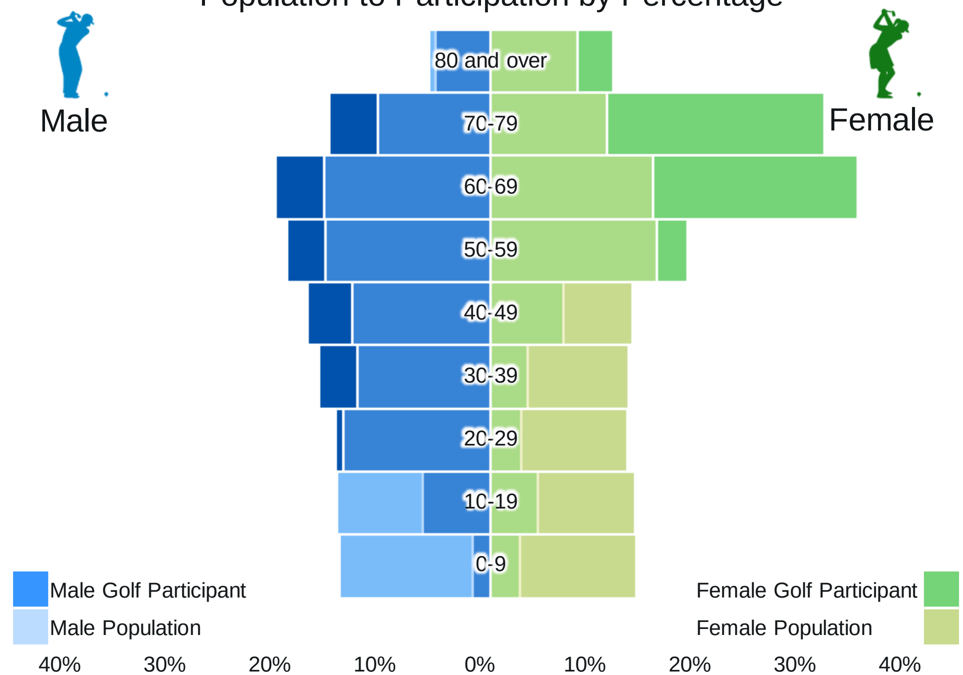
WIMMERA-MALLEE – MEMBERSHIP

	Wimmera - Mallee		Regional Victoria		Victoria	
Total Population	**152,106**		**1,550,081**		**6,596,039**	
Male	76,523	**50.3%**	768,351	**49.6%**	3,266,931	**49.5%**
Female	75,583	**49.7%**	781,730	**50.4%**	3,329,108	**50.5%**
Total Participation	**8,154**		**57,494**		**150,367**	
Male	6,327	**78%**	45,449	**79.0%**	122,385	**81.4%**
Female	1,827	**22%**	12,045	**21.0%**	27,982	**18.6%**
Participation Rate	**5.4%**		**3.7%**		**2.3%**	
Male	8.3%		5.9%		3.7%	
Female	2.4%		1.5%		0.8%	

Projected Population (2031)

	Male	Female	Total
Projected Population (2031)	77,775	75,611	153,386
Change	1,252	28	1,280
Percentage Growth	1.6%	0.0%	0.8%

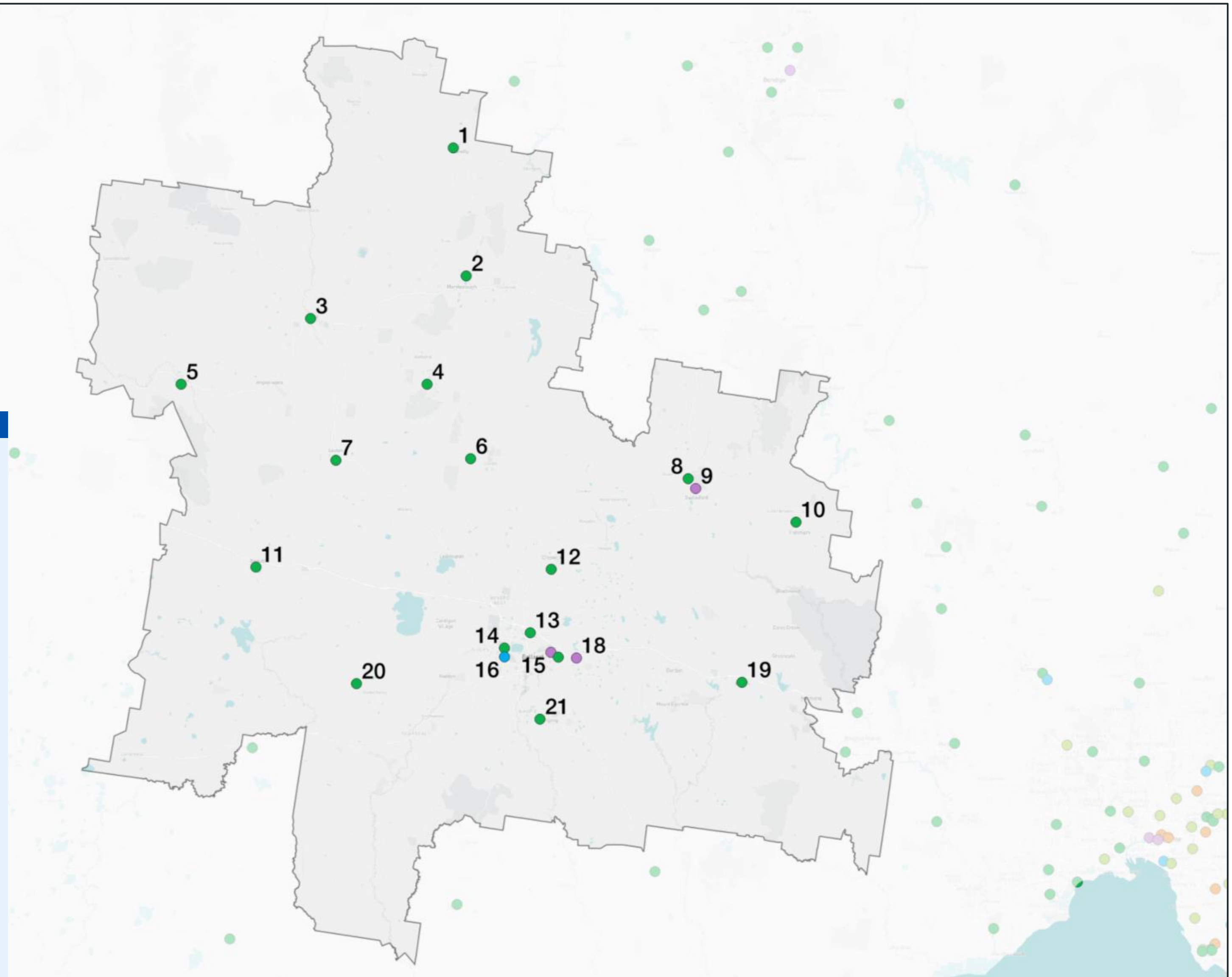
Population to Participation by Percentage



Male				Female		
Total Population	Total Participation	Participation Rate	Age	Total Population	Total Participation	Participation Rate
3,823	200	5.2%	**80+**	5,293	116	2.2%
7,039	575	8.2%	**70-79**	7,078	315	4.5%
10,384	767	7.4%	**60-69**	9,905	346	3.5%
10,242	727	7.1%	**50-59**	10,150	185	1.8%
8,602	651	7.6%	**40-49**	8,663	68	0.8%
8,274	611	7.4%	**30-39**	8,451	35	0.4%
9,168	554	6.0%	**20-29**	8,341	29	0.3%
9,585	243	2.5%	**10-19**	8,817	44	0.5%
9,406	66	0.7%	**0-9**	8,885	27	0.3%

CENTRAL HIGHLANDS – GOLF FACILITIES

Legend	Total
Member Club	17
Public Course	0
Short Course	0
Driving Range	1
Golf Simulator	0
Mini Golf	4



Golf Facilities		
1	Dunolly Golf Club	Member Club
2	Maryborough Golf Club	Member Club
3	Avoca Golf Club	Member Club
4	Talbot Golf Club	Member Club
5	Elmhurst Golf Club	Member Club
6	Clunes Golf Club	Member Club
7	Lexton Golf Club	Member Club
8	Hepburn Springs Golf Club	Member Club
9	Daylesford Mini Golf	Mini Golf
10	Trentham Golf Club	Member Club
11	Beaufort Golf Club	Member Club
12	RACV Goldfields Resort/ Creswick Golf Club	Member Club
13	Midlands Golf Club	Member Club
14	Ballarat Golf Club	Member Club
15	Welcome Stranger Holiday Park	Mini Golf
16	Golf City Ballarat	Driving Range, Mini Golf
17	Mount Xavier Golf Club	Member Club
18	Gold Rush Mini Golf	Mini Golf
19	Ballan Golf Club	Member Club
20	Snake Valley Golf Club	Member Club
21	Buninyong Golf Club	Member Club

CENTRAL HIGHLANDS – FACILITY PROVISION SUMMARY

Current population and golf facility supply

Total Population	Population Growth (2031)	Member Clubs	Public Courses	Driving Ranges	Simulators	Mini Golf
167,552	18.00%	17	0	1	1	4

Current Accessibility and Future Facility Planning Priorities

Facility Type		Drive Time (Mins)	Catchment	% of Population within specified catchment	New facility requirements	Strategic Priorities
Golf Course/ Short Course	Member Club	5	33,068	21%	M	• Maintain current provision. • Identify opportunities to increase access through new public and short courses.
		10	111,153	71%		
	Public Course	5	1,383	1%		
		10	2,154	1%		
		15	3,164	2%		
Driving Range		5	7,760	5%	M	• Maintain current provision.
		10	91,423	58%		
		15	111,153	71%		
Simulator		15	0	0%	↑	• Encourage new simulators as an innovative format and guide provision to supplement driving ranges where space is a constraint.
		20	0	0%		
		30	0	0%		
Mini Golf		15	107,092	68%	M	• Maintain current provision.
		20	121,740	77%		

New Facility Requirements *is based on a ratio of the number of facilities required in 2031 divided by the current number of facilities. The facilities required equation includes variables for population change, facility capacity, current membership and broader consumer demand for each type of facility.*

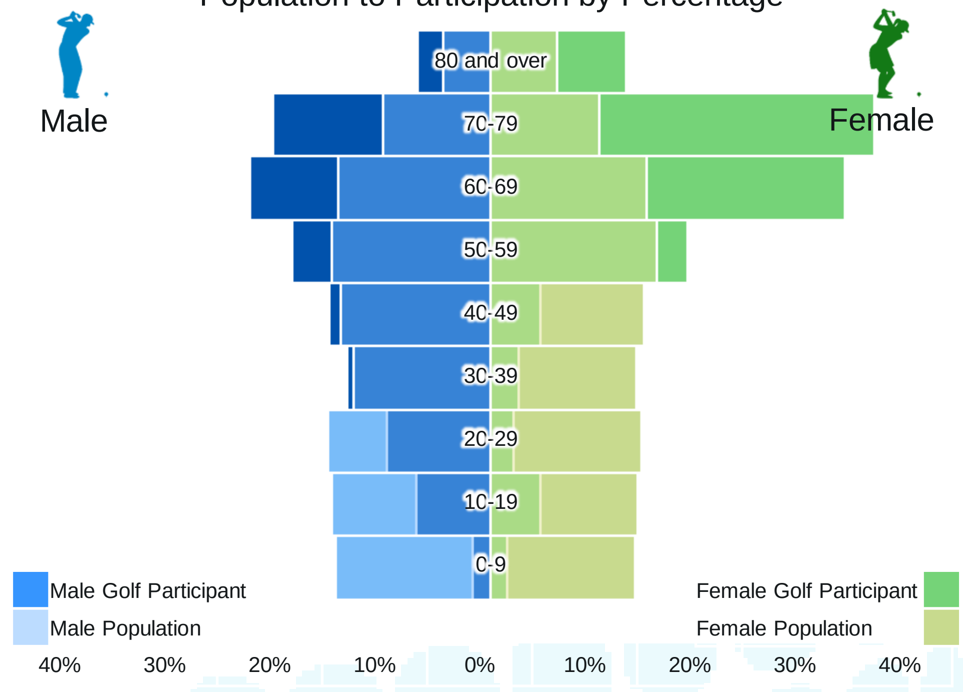
CENTRAL HIGHLANDS – MEMBERSHIP

	Central Highlands		Regional Victoria		Victoria	
Total Population	**167,552**		**1,550,081**		**6,596,039**	
Male	82,503	**49.2%**	768,351	**49.6%**	3,266,931	**49.5%**
Female	85,049	**50.8%**	781,730	**50.4%**	3,329,108	**50.5%**
Total Participation	**4,360**		**57,494**		**150,367**	
Male	3,544	**81%**	45,449	**79.0%**	122,385	**81.4%**
Female	816	**19%**	12,045	**21.0%**	27,982	**18.6%**
Participation Rate	**2.6%**		**3.7%**		**2.3%**	
Male	4.3%		5.9%		3.7%	
Female	1.0%		1.5%		0.8%	

Projected Population (2031)

	Male	Female	Total
Projected Population (2031)	96,288	101,427	197,715
Change	13,785	16,378	30,163
Percentage Growth	16.7%	19.3%	18.0%

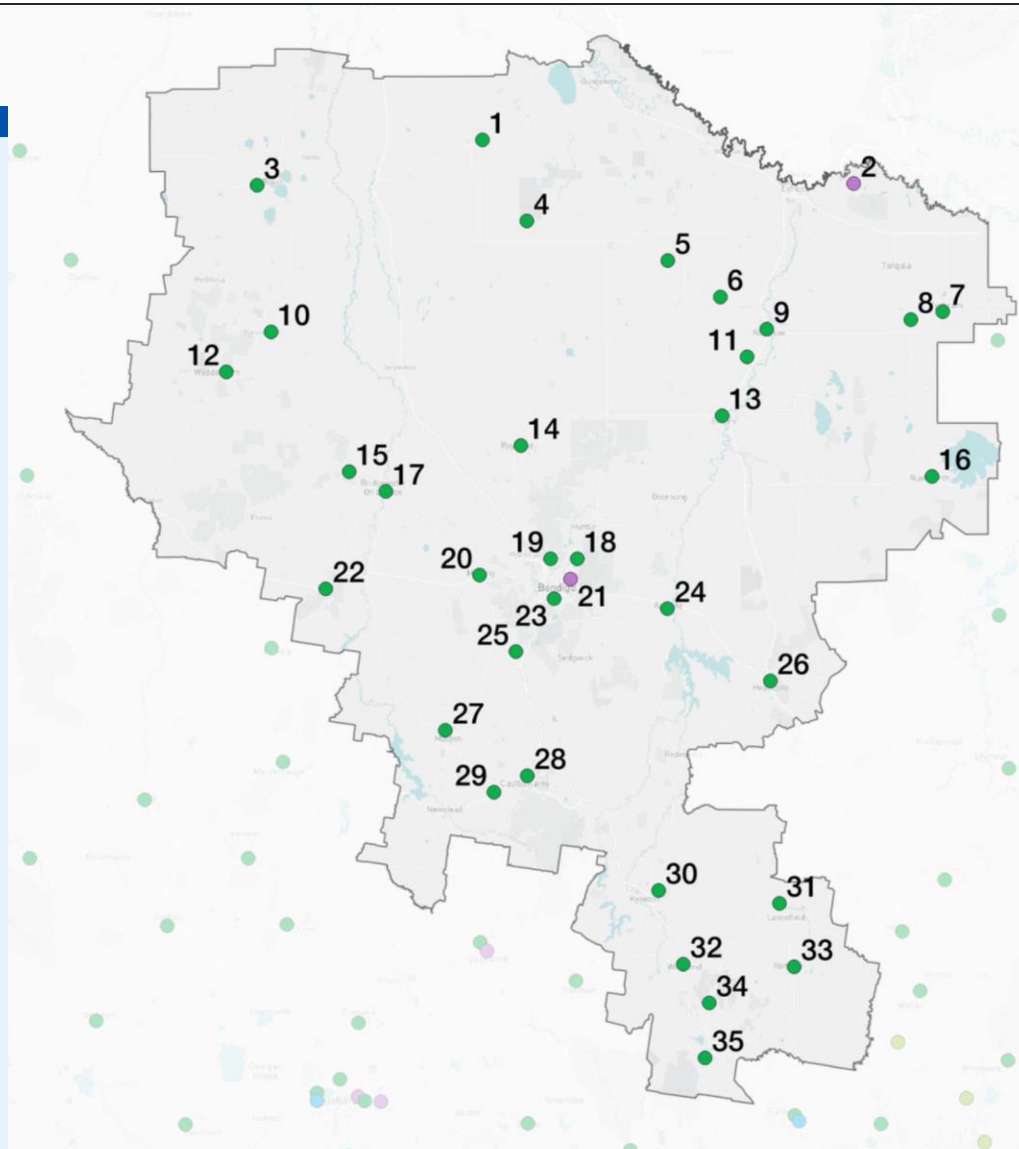
Population to Participation by Percentage



Male				Female		
Total Population	Total Participation	Participation Rate	Age	Total Population	Total Participation	Participation Rate
3,189	163	5.1%	**80+**	4,550	73	1.6%
7,224	485	6.7%	**70-79**	7,416	207	2.8%
10,228	535	5.2%	**60-69**	10,711	191	1.8%
10,630	443	4.2%	**50-59**	11,408	106	0.9%
10,048	361	3.6%	**40-49**	10,549	27	0.3%
9,225	319	3.5%	**30-39**	10,033	15	0.1%
10,915	232	2.1%	**20-29**	10,360	12	0.1%
10,619	165	1.6%	**10-19**	10,097	27	0.3%
10,425	42	0.4%	**0-9**	9,925	9	0.1%

LODDON-CAMPASPE – GOLF FACILITIES

Golf Facilities		
1	Pyramid Hill Golf Club	●
2	Billabong Ranch	●
3	Boort Golf Club	●
4	Mitiamo Golf Club	●
5	Lockington Golf Club	●
6	Bamawm Golf Club	●
7	Kyabram Parkland Golf Club	●
8	Kyabram Valley View Golf Club	●
9	Campaspe Golf Club	●
10	Korong Vale Golf Club	●
11	Rochester Golf Club	●
12	Wedderburn Golf Club	●
13	Elmore Golf Club	●
14	Raywood Golf Club	●
15	Inglewood Golf Club	●
16	Rushworth Golf Club	●
17	Bridgewater-On-Loddon Golf Club	●
18	Bendigo Golf Club	●
19	Neangar Park Golf Club	● ●
20	Marong Golf Club	●
21	The Zone Fun Park	●
22	Tarnagulla and District Golf Club	●
23	Quarry Hill Golf Club	●
24	Axedale Golf Club	●
25	Belvoir Park Golf Club	●
26	Heathcote Golf Club	●
27	Maldon Golf Club	●
28	Mount Alexander Golf Club	●
29	Castlemaine Golf Club	●
30	Kyneton Golf Club	●
31	Lancefield Golf Club	●
32	Woodend Golf Club	●
33	Romsey Golf Club	●
34	Mount Macedon Golf Club	●
35	Gisborne Golf Club	●



Legend	Total
Member Club	33
Public Course	0
Short Course	0
Driving Range	1
Golf Simulator	0
Mini Golf	2

LODDON-CAMPASPE – FACILITY PROVISION SUMMARY

GolfAustralia

Current population and golf facility supply

Total Population	Population Growth (2031)	Member Clubs	Public Courses	Driving Ranges	Simulators	Mini Golf
233,177	16.19%	33	0	1	1	2

Current Accessibility and Future Facility Planning Priorities

Facility Type		Drive Time (Mins)	Catchment	% of Population within specified catchment	New facility requirements	Strategic Priorities
Golf Course/ Short Course	Member Club	5	46,241	21%	M	• Maintain current provision.
		10	148,170	67%		
	Public Course	5	42,439	19%		
		10	139,576	64%		
		15	181,782	83%		
Driving Range		5	8,434	4%	↑	• Need for 1 new driving range facility in a strategic location to address accessibility gaps.
		10	65,397	30%		
		15	148,170	67%		
Simulator		15	0	0%	↑	• Encourage new simulators as an innovative format and guide provision to supplement driving ranges where space is a constraint.
		20	0	0%		
		30	0	0%		
Mini Golf		15	86,498	39%	M	• Maintain current provision.
		20	108,565	49%		

New Facility Requirements *is based on a ratio of the number of facilities required in 2031 divided by the current number of facilities. The facilities required equation includes variables for population change, facility capacity, current membership and broader consumer demand for each type of facility.*

LODDON-CAMPASPE – MEMBERSHIP

	Loddon Campaspe		Regional Victoria		Victoria	
Total Population	**233,177**		**1,550,081**		**6,596,039**	
Male	115,271	**49.4%**	768,351	**49.6%**	3,266,931	**49.5%**
Female	117,906	**50.6%**	781,730	**50.4%**	3,329,108	**50.5%**

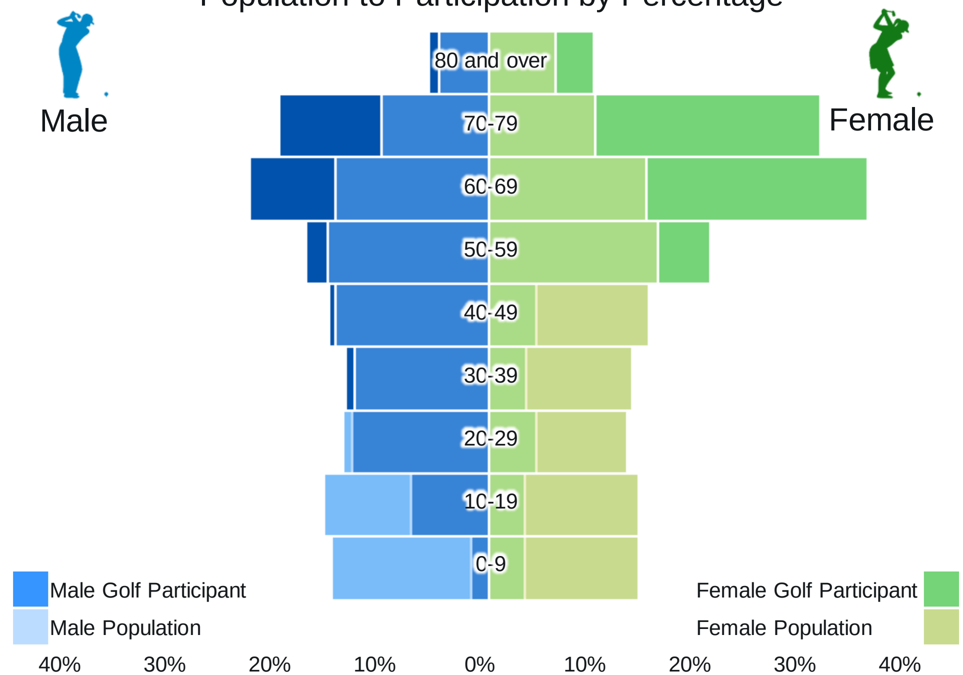
	Loddon Campaspe		Regional Victoria		Victoria	
Total Participation	**6,828**		**57,494**		**150,367**	
Male	5,499	**81%**	45,449	**79.0%**	122,385	**81.4%**
Female	1,329	**19%**	12,045	**21.0%**	27,982	**18.6%**

	Loddon Campaspe	Regional Victoria	Victoria
Participation Rate	**2.9%**	**3.7%**	**2.3%**
Male	4.8%	5.9%	3.7%
Female	1.1%	1.5%	0.8%

Projected Population (2031)

	Male	Female	Total
Projected Population (2031)	133,404	137,517	270,921
Change	18,133	19,611	37,744
Percentage Growth	15.7%	16.6%	16.2%

Population to Participation by Percentage

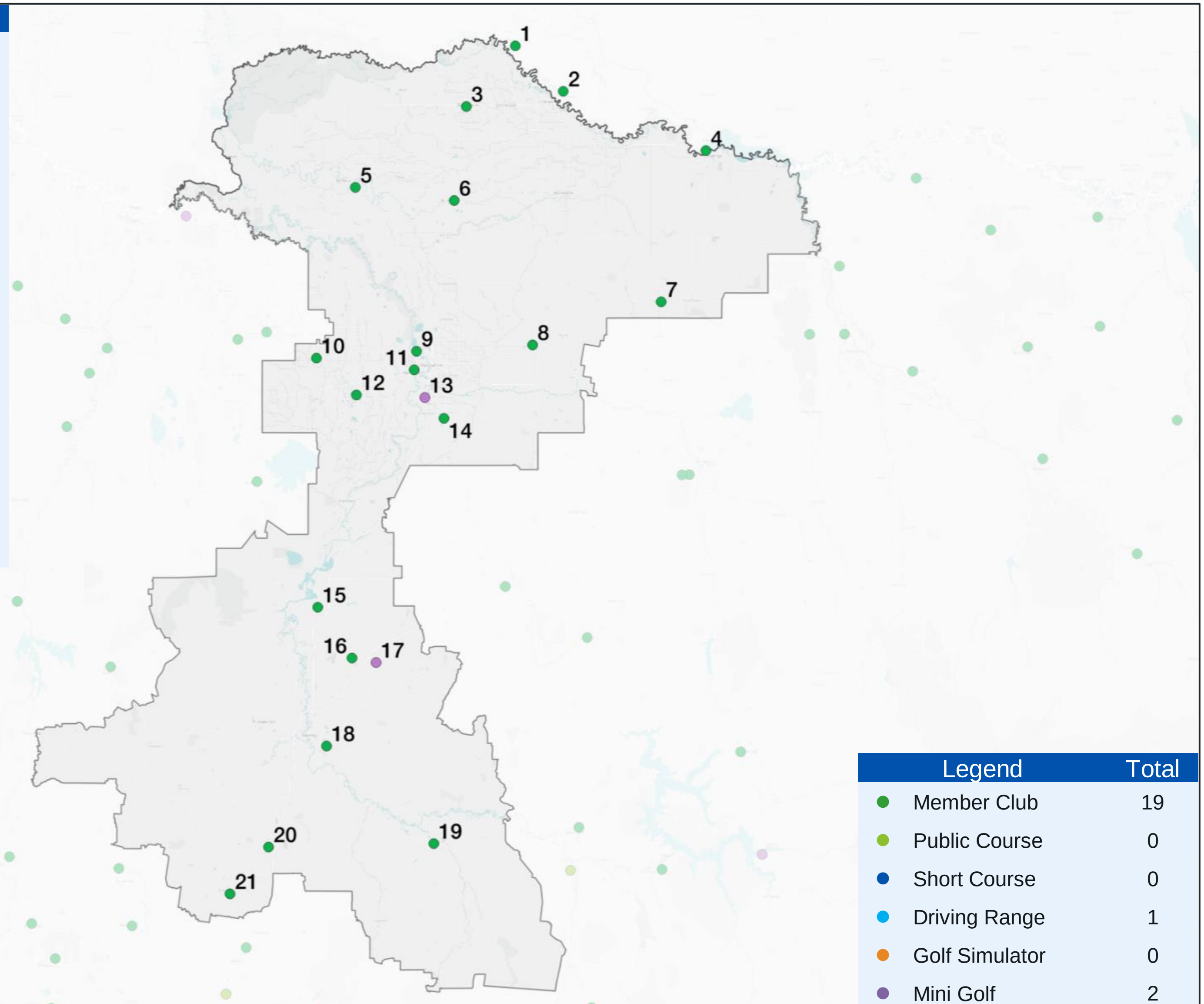


Male				Female		
Total Population	Total Participation	Participation Rate	Age	Total Population	Total Participation	Participation Rate
4,766	177	3.7%	**80+**	6,358	75	1.2%
10,123	608	6.0%	**70-79**	10,045	237	2.4%
14,366	694	4.8%	**60-69**	15,010	271	1.8%
15,155	533	3.5%	**50-59**	16,055	158	1.0%
14,364	465	3.2%	**40-49**	15,194	34	0.2%
12,555	416	3.3%	**30-39**	13,634	26	0.2%
13,671	399	2.9%	**20-29**	13,117	34	0.3%
15,472	229	1.5%	**10-19**	14,214	25	0.2%
14,799	53	0.4%	**0-9**	14,279	25	0.2%

GOULBURN – GOLF FACILITIES

GolfAustralia

Golf Facilities		
1	Tocumwal Golf Club	●
2	Cobram-Barooga Golf Club	●
3	Strathmerton Golf Club	●
4	Yarrawonga Mulwala Golf Club Resort	●
5	Nathalia Golf Club	●
6	Numurkah Golf & Bowls Club	●
7	St James Golf Club	●
8	Cosgrove Golf Club	●
9	Shepparton Golf Club	●
10	Merrigum Golf Club	●
11	Mooroopna Golf Club	● ●
12	Hill Top Golf and Country Club	●
13	Riverside Gardens	●
14	Kialla Country Club	●
15	Nagambie Golf Club	●
16	Avenel Golf Club	●
17	Avenel Maze	●
18	Seymour Golf Club	●
19	Yea Golf Club	●
20	Broadford Golf Club	●
21	Kilmore Golf Club	●



Legend	Total
Member Club	19
Public Course	0
Short Course	0
Driving Range	1
Golf Simulator	0
Mini Golf	2

GOULBURN – FACILITY PROVISION SUMMARY

Current population and golf facility supply

Total Population	Population Growth (2031)	Member Clubs	Public Courses	Driving Ranges	Simulators	Mini Golf
130,776	12.09%	19	0	1	1	2

Current Accessibility and Future Facility Planning Priorities

Facility Type		Drive Time (Mins)	Catchment	% of Population within specified catchment	New facility requirements	Strategic Priorities
Golf Course/ Short Course	Member Club	5	17,541	14%	M	• Maintain current provision.
		10	71,538	57%		
	Public Course	5	15,058	12%		
		10	57,797	46%		
		15	92,952	74%		
Driving Range		5	2,707	2%	↑	• Need for 1 new driving range facility in a strategic location to address accessibility gaps.
		10	47,291	38%		
		15	71,538	57%		
Simulator		15	0	0%	↑	• Encourage new simulators as an innovative format and guide provision to supplement driving ranges where space is a constraint.
		20	0	0%		
		30	0	0%		
Mini Golf		15	40,280	32%	M	• Maintain current provision.
		20	50,860	41%		

New Facility Requirements *is based on a ratio of the number of facilities required in 2031 divided by the current number of facilities. The facilities required equation includes variables for population change, facility capacity, current membership and broader consumer demand for each type of facility.*

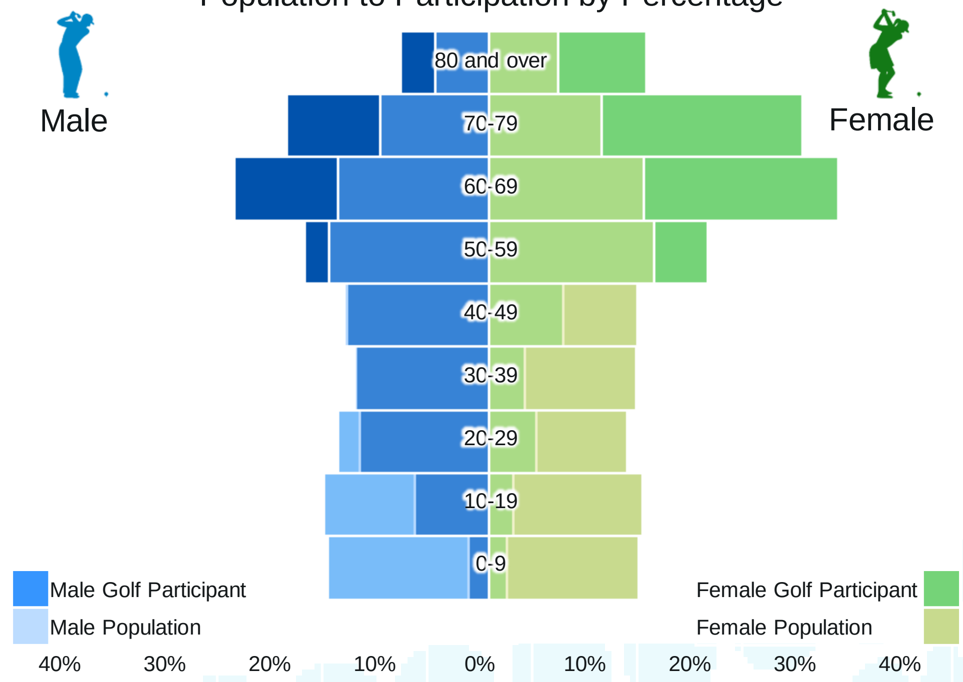
GOULBURN – MEMBERSHIP

	Goulburn		Regional Victoria		Victoria	
Total Population	**130,776**		**1,550,081**		**6,596,039**	
Male	65,704	**50.2%**	768,351	**49.6%**	3,266,931	**49.5%**
Female	65,072	**49.8%**	781,730	**50.4%**	3,329,108	**50.5%**
Total Participation	**6,082**		**57,494**		**150,367**	
Male	4,837	**80%**	45,449	**79.0%**	122,385	**81.4%**
Female	1,245	**20%**	12,045	**21.0%**	27,982	**18.6%**
Participation Rate	**4.7%**		**3.7%**		**2.3%**	
Male	7.4%		5.9%		3.7%	
Female	1.9%		1.5%		0.8%	

Projected Population (2031)

	Male	Female	Total
Projected Population (2031)	73,156	73,437	146,593
Change	7,452	8,365	15,817
Percentage Growth	11.3%	12.9%	12.1%

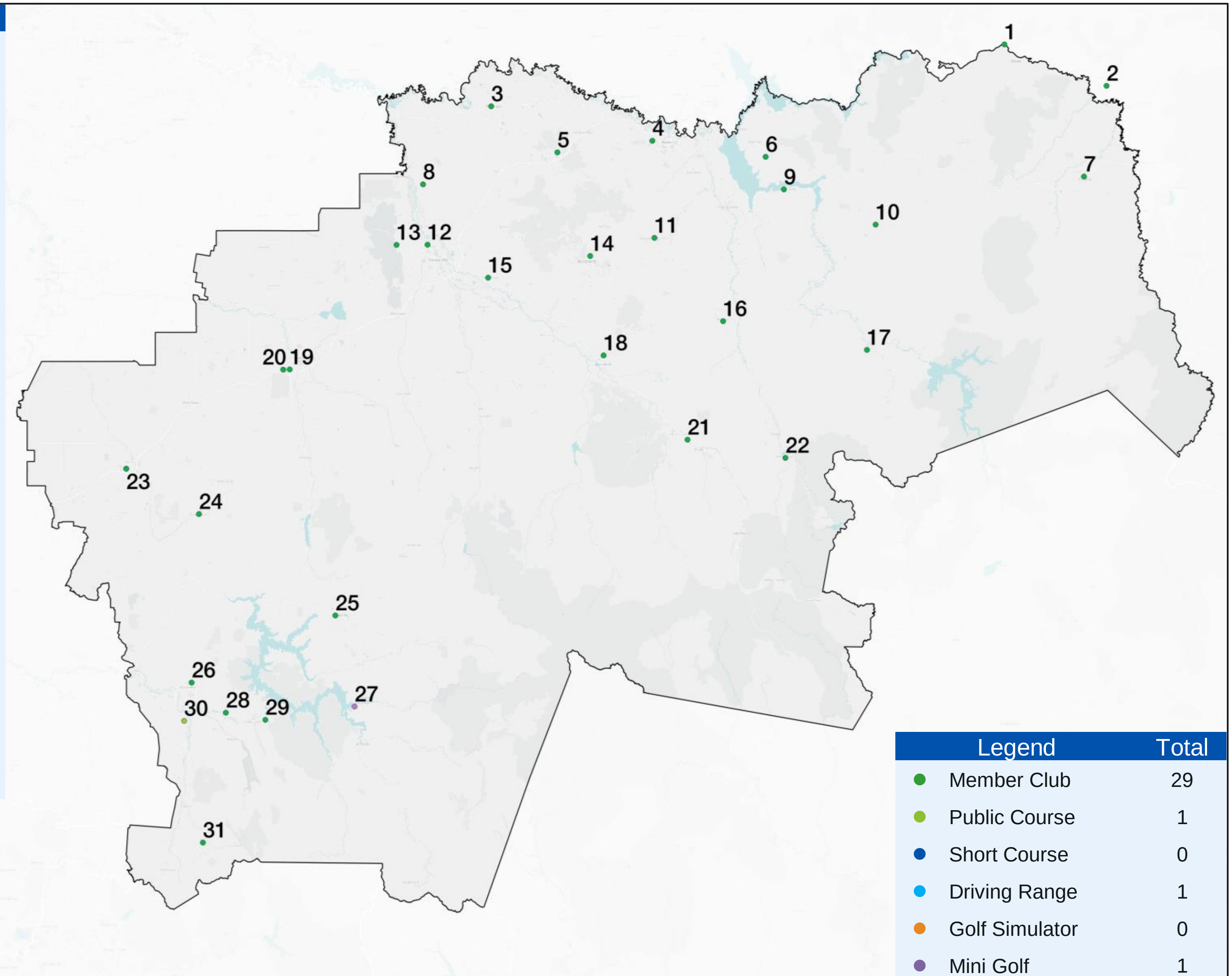
Population to Participation by Percentage



Male				Female		
Total Population	Total Participation	Participation Rate	Age	Total Population	Total Participation	Participation Rate
2,876	250	8.7%	**80+**	3,588	114	3.2%
5,850	574	9.8%	**70-79**	5,921	227	3.8%
8,086	722	8.9%	**60-69**	8,139	253	3.1%
8,510	524	6.2%	**50-59**	8,688	159	1.8%
7,721	405	5.2%	**40-49**	7,816	54	0.7%
7,184	380	5.3%	**30-39**	7,725	26	0.3%
8,045	369	4.6%	**20-29**	7,284	34	0.5%
8,808	212	2.4%	**10-19**	8,060	17	0.2%
8,624	59	0.7%	**0-9**	7,851	13	0.2%

NORTH EAST – GOLF FACILITIES

Golf Facilities	
1	Walwa Golf Club
2	Welaregang Country Golf Club
3	Rutherglen Golf Club
4	Wodonga Golf Club
5	Chiltern Golf Club
6	Bethanga & District Golf Club
7	Corryong Golf Club
8	Boorhaman Golf Club
9	Tallangatta Golf Club
10	Tallangatta Valley Golf Club
11	Yackandandah Golf Club
12	Wangaratta Golf Club
13	Jubilee Golf Club
14	Beechworth Golf Club
15	Tarrawingee Golf Club
16	Dederang Golf Club
17	Mitta Mitta Golf Club
18	Myrtleford Golf Club
19	Benalla Golf Club
20	Golden Vale Golf Club
21	Bright Country Golf Club
22	Mount Beauty Golf Club
23	Euroa Golf Club
24	Strathbogie Golf Club
25	Mansfield Golf Club
26	Alexandra Golf Club
27	High Country Mini Golf
28	Cathedral Lodge and Golf Club
29	Eildon Golf Club
30	Stonelea Country Estate
31	Marysville Golf Club



Legend	Total
Member Club	29
Public Course	1
Short Course	0
Driving Range	1
Golf Simulator	0
Mini Golf	1

NORTH EAST – FACILITY PROVISION SUMMARY

Current population and golf facility supply

Total Population	Population Growth (2031)	Member Clubs	Public Courses	Driving Ranges	Simulators	Mini Golf
144,030	13.15%	29	1	1	1	1

Current Accessibility and Future Facility Planning Priorities

Facility Type		Drive Time (Mins)	Catchment	% of Population within specified catchment	New facility requirements	Strategic Priorities
Golf Course/ Short Course	Member Club	5	33,089	24%	M	• Maintain current provision. • Identify opportunities to increase access through new public and short courses.
		10	84,114	62%		
	Public Course	5	14,247	10%		
		10	46,251	34%		
		15	63,800	46%		
Driving Range		5	1,984	1%	M	• Maintain current provision.
		10	3,386	2%		
		15	84,017	61%		
Simulator		15	0	0%	↑	• Encourage new simulators as an innovative format and guide provision to supplement driving ranges where space is a constraint.
		20	0	0%		
		30	0	0%		
Mini Golf		15	392	0%	M	• Maintain current provision.
		20	984	1%		

New Facility Requirements *is based on a ratio of the number of facilities required in 2031 divided by the current number of facilities. The facilities required equation includes variables for population change, facility capacity, current membership and broader consumer demand for each type of facility.*

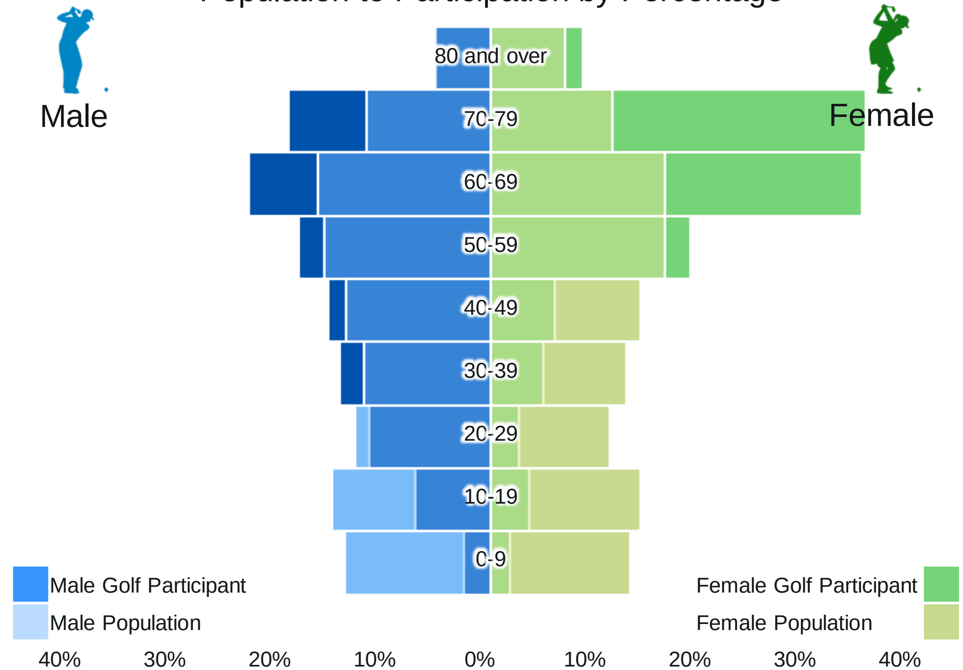
NORTH EAST – MEMBERSHIP

	North East		Regional Victoria		Victoria	
Total Population	**144,030**		**1,550,081**		**6,596,039**	
Male	71,317	**49.5%**	768,351	**49.6%**	3,266,931	**49.5%**
Female	72,713	**50.5%**	781,730	**50.4%**	3,329,108	**50.5%**
Total Participation	**4,423**		**57,494**		**150,367**	
Male	3,534	**80%**	45,449	**79.0%**	122,385	**81.4%**
Female	889	**20%**	12,045	**21.0%**	27,982	**18.6%**
Participation Rate	**3.1%**		**3.7%**		**2.3%**	
Male	5.0%		5.9%		3.7%	
Female	1.2%		1.5%		0.8%	

Projected Population (2031)

	Male	**Female**	**Total**
Projected Population (2031)	80,916	82,060	162,976
Change	9,599	9,347	18,946
Percentage Growth	13.5%	12.9%	13.2%

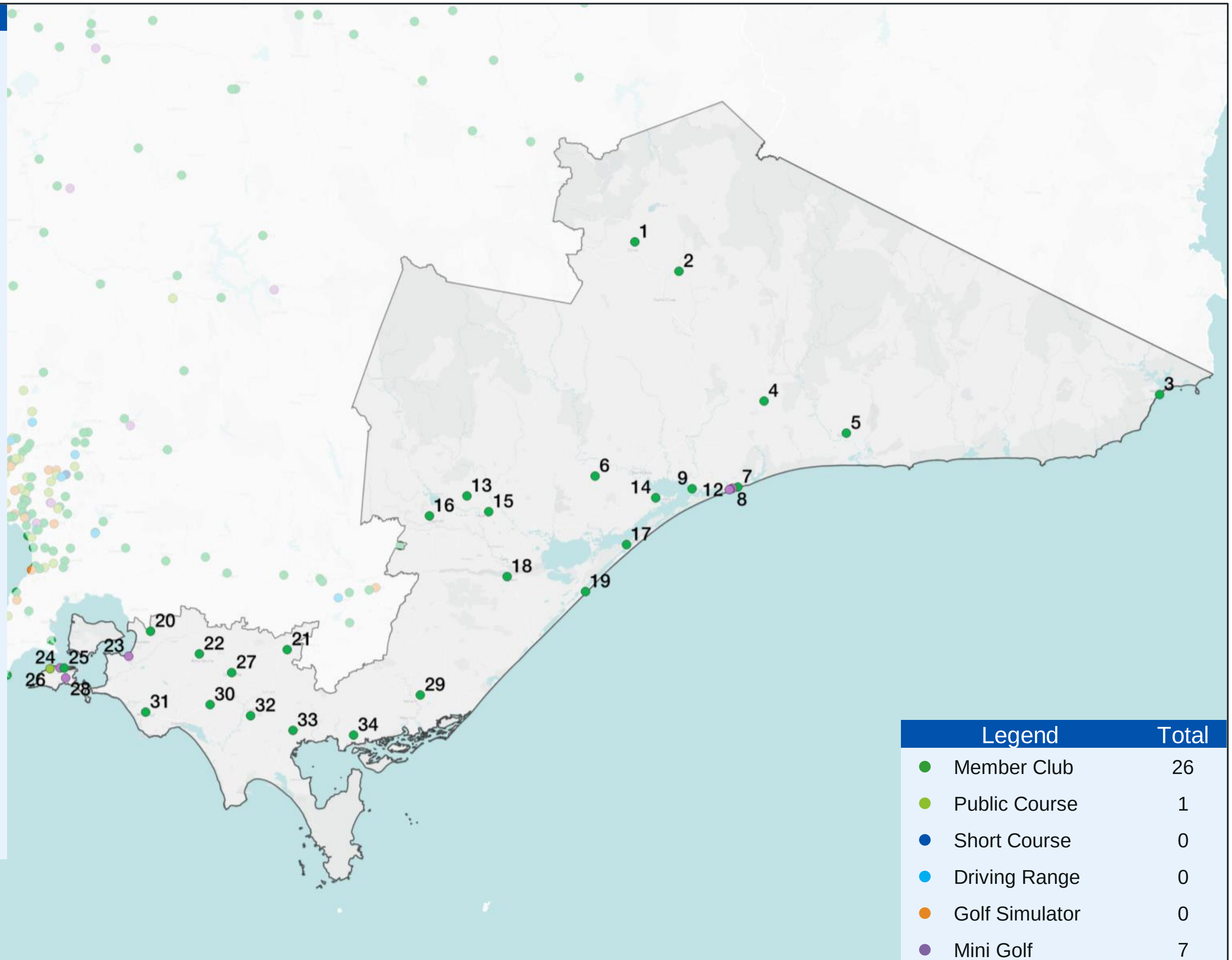
Population to Participation by Percentage



Male				Female		
Total Population	Total Participation	Participation Rate	Age	Total Population	Total Participation	Participation Rate
3,257	108	3.3%	**80+**	4,354	39	0.9%
7,183	392	5.5%	**70-79**	7,121	160	2.2%
10,032	468	4.7%	**60-69**	10,236	158	1.5%
9,657	373	3.9%	**50-59**	10,253	85	0.8%
8,389	314	3.7%	**40-49**	8,787	27	0.3%
7,318	292	4.0%	**30-39**	7,969	22	0.3%
7,848	237	3.0%	**20-29**	6,984	12	0.2%
9,184	148	1.6%	**10-19**	8,806	16	0.2%
8,449	54	0.6%	**0-9**	8,203	8	0.1%

GIPPSLAND – GOLF FACILITIES

Golf Facilities	
1	Omeo Golf Club
2	Tambo Valley Golf Club
3	Mallacoota Golf Club
4	Buchan Valley Golf Club
5	Orbost Golf Club
6	South Pines Golf Club
7	Lakes Entrance Golf Club
8	Lakes Entrance Mini Golf
9	Kings Cove Club
10	Footbridge Mini Golf
11	Blackball & Basket Mini Golf
12	Esplanade Mini Golf
13	Newry Golf Club
14	Bairnsdale Golf Club
15	Maffra Golf Club
16	Heyfield Golf Club
17	Loch Sport Golf Club
18	Sale Golf Club
19	Golden Beach Golf Club
20	Lang Lang Golf Club
21	Mirboo North Golf Club
22	Korumburra Golf Club
23	Maru Koala and Animal Park
24	Grumpy's Crazy Golf
25	Phillip Island Golf Club
26	Aussie Golf Ranch
27	Woorayl Golf Club
28	A Maze'N Things
29	Yarram Golf Club
30	Leongatha Golf Club
31	Wonthaggi Golf Club
32	Meeniyan Golf Club
33	Foster Golf Club
34	Welshpool Golf Club



Legend	Total
Member Club	26
Public Course	1
Short Course	0
Driving Range	0
Golf Simulator	0
Mini Golf	7

GolfAustralia

GIPPSLAND – FACILITY PROVISION SUMMARY

Current population and golf facility supply

Total Population	Population Growth (2031)	Member Clubs	Public Courses	Driving Ranges	Simulators	Mini Golf
158,076	13.08%	26	1	0	0	7

Current Accessibility and Future Facility Planning Priorities

Facility Type		Drive Time (Mins)	Catchment	% of Population within specified catchment	New facility requirements	Strategic Priorities
Golf Course/ Short Course	Member Club	5	24,026	16%	M	• Maintain current provision. • Identify opportunities to increase access through new public and short courses.
		10	64,833	43%		
	Public Course	5	1,261	1%		
		10	5,266	4%		
		15	8,002	5%		
Driving Range		5	0	0%	↑	• Need for 1 new driving range facility in a strategic location to address accessibility gaps.
		10	0	0%		
		15	64,833	43%		
Simulator		15	0	0%	↑	• Encourage new simulators as an innovative format and guide provision to supplement driving ranges where space is a constraint.
		20	0	0%		
		30	137	0%		
Mini Golf		15	23,080	15%	M	• Maintain current provision.
		20	25,626	17%		

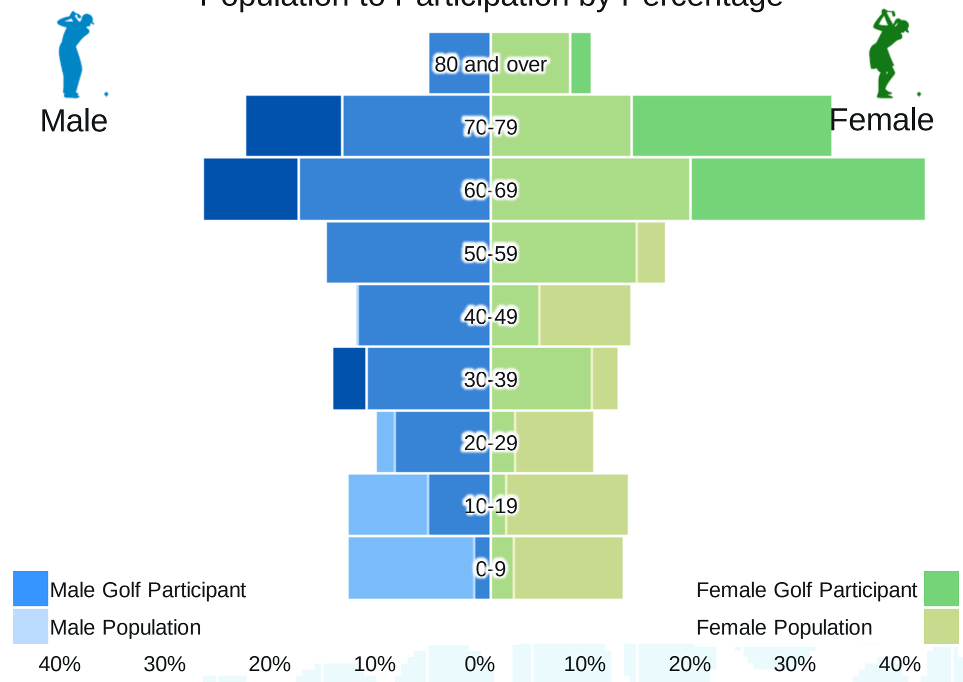
New Facility Requirements *is based on a ratio of the number of facilities required in 2031 divided by the current number of facilities. The facilities required equation includes variables for population change, facility capacity, current membership and broader consumer demand for each type of facility.*

	Gippsland		Regional Victoria		Victoria	
Total Population	**158,076**		**1,550,081**		**6,596,039**	
Male	78,826	**49.9%**	768,351	**49.6%**	3,266,931	**49.5%**
Female	79,250	**50.1%**	781,730	**50.4%**	3,329,108	**50.5%**
Total Participation	**5,644**		**57,494**		**150,367**	
Male	4,244	**75%**	45,449	**79.0%**	122,385	**81.4%**
Female	1,400	**25%**	12,045	**21.0%**	27,982	**18.6%**
Participation Rate	**3.6%**		**3.7%**		**2.3%**	
Male	5.4%		5.9%		3.7%	
Female	1.8%		1.5%		0.8%	

Projected Population (2031)

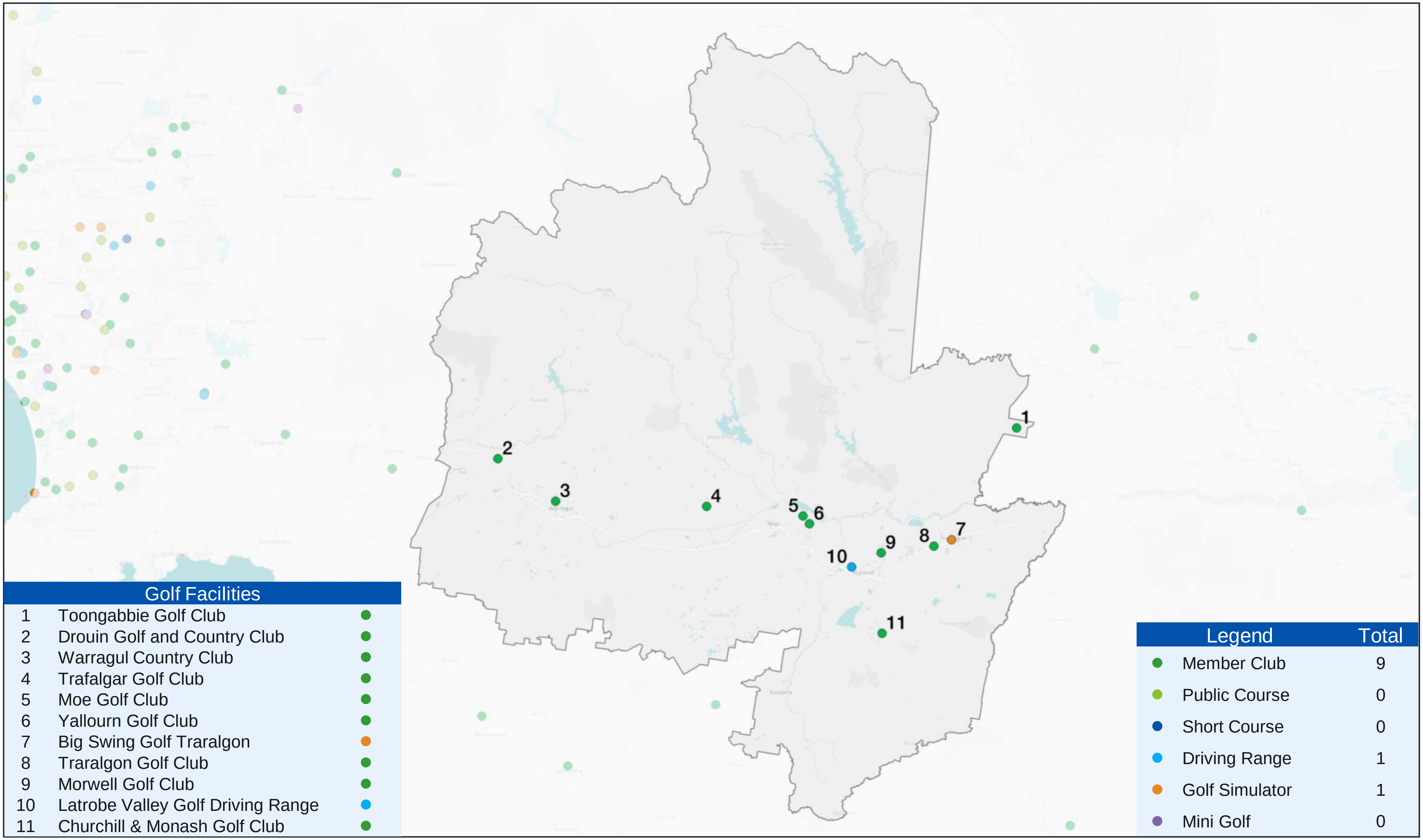
	Male	Female	Total
Projected Population (2031)	88,434	90,326	178,760
Change	9,608	11,076	20,684
Percentage Growth	12.2%	14.0%	13.1%

Population to Participation by Percentage



Male				Female		
Total Population	Total Participation	Participation Rate	Age	Total Population	Total Participation	Participation Rate
4,056	139	3.4%	**80+**	5,041	74	1.5%
9,476	530	5.6%	**70-79**	9,013	251	2.8%
12,329	620	5.0%	**60-69**	12,815	323	2.5%
10,597	356	3.4%	**50-59**	11,253	107	1.0%
8,696	286	3.3%	**40-49**	8,963	35	0.4%
7,922	342	4.3%	**30-39**	8,153	74	0.9%
7,390	208	2.8%	**20-29**	6,653	18	0.3%
9,189	136	1.5%	**10-19**	8,842	11	0.1%
9,171	38	0.4%	**0-9**	8,517	17	0.2%

LATROBE-STREZLECKI – GOLF FACILITIES



Golf Facilities		
1	Toongabbie Golf Club	● (green)
2	Drouin Golf and Country Club	● (green)
3	Warragul Country Club	● (green)
4	Trafalgar Golf Club	● (green)
5	Moe Golf Club	● (green)
6	Yallourn Golf Club	● (green)
7	Big Swing Golf Traralgon	● (orange)
8	Traralgon Golf Club	● (green)
9	Morwell Golf Club	● (green)
10	Latrobe Valley Golf Driving Range	● (light blue)
11	Churchill & Monash Golf Club	● (green)

Legend	Total
Member Club	9
Public Course	0
Short Course	0
Driving Range	1
Golf Simulator	1
Mini Golf	0

LATROBE-STREZLECKI – FACILITY PROVISION SUMMARY

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Current population and golf facility supply

Total Population	Population Growth (2031)	Member Clubs	Public Courses	Driving Ranges	Simulators	Mini Golf
128,876	16.56%	9	0	1	1	0

Current Accessibility and Future Facility Planning Priorities

Facility Type		Drive Time (Mins)	Catchment	% of Population within specified catchment	New facility requirements	Strategic Priorities
Golf Course/ Short Course	Member Club	5	26,253	22%	M	• Maintain current provision. • Identify opportunities to increase access through new public and short courses.
		10	88,819	73%		
	Public Course	5	0	0%		
		10	0	0%		
		15	0	0%		
Driving Range		5	2,351	2%	M	• Maintain current provision.
		10	37,844	31%		
		15	88,819	73%		
Simulator		15	25,094	21%	↑	• Encourage new simulators as an innovative format and guide provision to supplement driving ranges where space is a constraint.
		20	40,625	33%		
		30	48,612	40%		
Mini Golf		15	3,208	3%	M	• Maintain current provision.
		20	17,742	15%		

New Facility Requirements *is based on a ratio of the number of facilities required in 2031 divided by the current number of facilities. The facilities required equation includes variables for population change, facility capacity, current membership and broader consumer demand for each type of facility.*

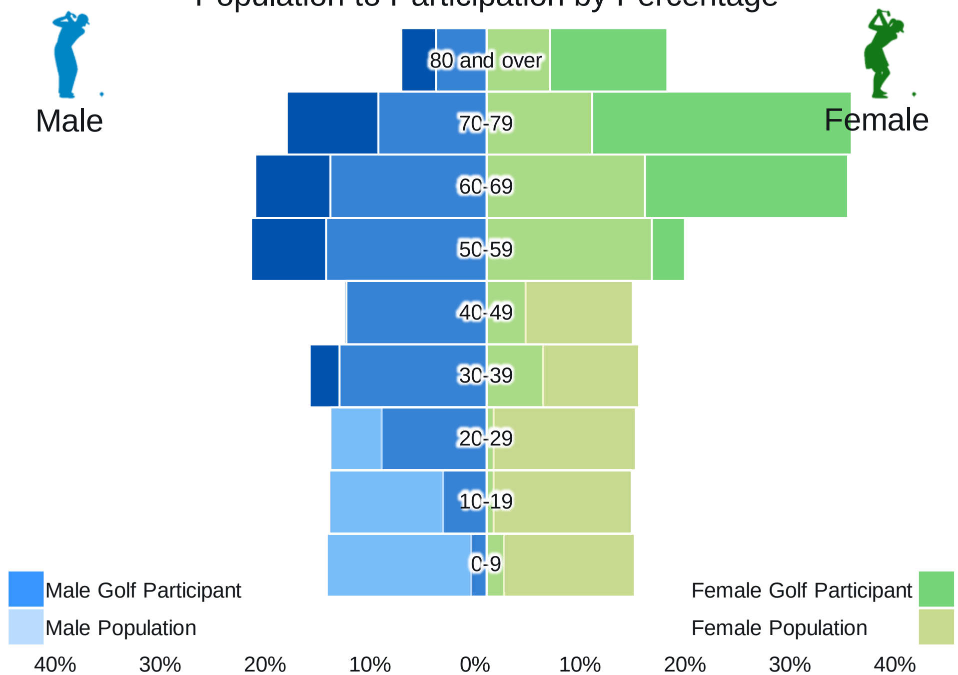
LATROBE-STREZLECKI – MEMBERSHIP

	La Trobe Strzelecki		Regional Victoria		Victoria	
Total Population	**128,876**		**1,550,081**		**6,596,039**	
Male	63,254	**49.1%**	768,351	**49.6%**	3,266,931	**49.5%**
Female	65,622	**50.9%**	781,730	**50.4%**	3,329,108	**50.5%**
Total Participation	**3,814**		**57,494**		**150,367**	
Male	3,205	**84%**	45,449	**79.0%**	122,385	**81.4%**
Female	609	**16%**	12,045	**21.0%**	27,982	**18.6%**
Participation Rate	**3.0%**		**3.7%**		**2.3%**	
Male	5.1%		5.9%		3.7%	
Female	0.9%		1.5%		0.8%	

Projected Population (2031)

	Male	Female	Total
Projected Population (2031)	73,875	76,342	150,217
Change	10,621	10,720	21,341
Percentage Growth	16.8%	16.3%	16.6%

Population to Participation by Percentage



Male				Female		
Total Population	Total Participation	Participation Rate	Age	Total Population	Total Participation	Participation Rate
2,581	117	4.5%	**80+**	3,372	51	1.5%
5,542	274	4.9%	**70-79**	5,621	103	1.8%
7,992	317	4.0%	**60-69**	8,420	102	1.2%
8,225	323	3.9%	**50-59**	8,792	56	0.6%
7,170	195	2.7%	**40-49**	7,770	11	0.1%
7,521	243	3.2%	**30-39**	8,116	16	0.2%
7,996	144	1.8%	**20-29**	7,937	2	0.0%
8,049	60	0.7%	**10-19**	7,716	2	0.0%
8,178	21	0.3%	**0-9**	7,878	5	0.1%

APPENDIX 2

National Golf Facilities Framework

NATIONAL GOLF FACILITIES FRAMEWORK

The National Golf Facilities Framework (NGFF) has been developed to assist golf clubs, facility operators, and all levels of government in the planning and developing of golf facilities. The framework will also support GA's ongoing advocacy for increased investment into new and existing golf facilities.

The purpose of the NGFF is to:

- Define the various golf facility types and categories that currently exist.
- Understand the target audiences and potential market sizes of each type of golf facility.
- Influence the golf community, facility operators, developers, and government regarding the optimal mix of facilities to increase engagement within the sport and transition Australians along the golfing pathway.
- Enhance the perception of the sport and communication of the variety of ways to engage in the game.

For the purposes of the NGFF, each facility type is treated as unique. Therefore, a facility footprint which incorporates a golf course, driving range and mini golf would be classified three times.

The NGFF will also assist in identifying gaps in facility provision and guide future planning decisions to ensure that all Australians have equitable access to the sport.

The following table shows the current Australian golf groups of interest and market size according to research carried out in 2021 by the Australian Golf Industry Council.

Groups of Interest	National Market Size*	% of Population
Club Members	380,000	4.2%
Round Players	865,000	9.6%
Ball Hitters	295,000	3.3%
Alternative Players	1,645,000	18.3%
Not Engaged Yet	5,800,000	64.6%

Source: AGIC Golf Landscape Research, 2021

NATIONAL GOLF FACILITIES FRAMEWORK

Facility Type	Category	Description	Primary Use	Target Audience(s)
Golf Course	Member Club	A golf course of 9 holes, 18 holes, more than 18 holes or other configurations that may consist of a variety of par 3, par 4 and par 5 holes and primarily exists as an entity for members of a club.	Playing Rounds	Club Members Round Players Ball Hitters
	Public	A golf course of 9 holes, 18 holes, more than 18 holes or other configurations that may consist of a variety of par 3, par 4 and par 5 holes that is open to the public 7 days a week and is primarily accessed by a green fee. May be owned privately or by a Council/government authority.	Playing Rounds Learning	Round Players Ball Hitters
Short Course	Par 3	A short golf course comprising entirely of par 3 holes that does not meet the definition of a pitch & putt course.	Learning Playing	Not Engaged Yet Alternative Players
	Pitch & Putt	A short golf course with a maximum hole length of 90 metres and total course length of 1,200 metres for 18 holes that is designed to be played with a maximum of 3 clubs – one of which must be a putter, as defined by the Federation of International Pitch and Putt Associations (FIPPA).	Learning Playing	Not Engaged Yet Alternative Players
Driving Range	Entertainment	A driving range with undercover bays, multiple targets, ball tracking technology, automated tees and food and beverage services.	Entertainment	Not Engaged Yet Alternative Players
	Skill Development	A driving range with distance markers, multiple targets and may include ball and swing tracking technology.	Ball Hitting Learning Practicing	Not Engaged Yet Alternative Players
Simulator	Entertainment	Indoor hitting bays with a graphically simulated driving range or golf course that include ball tracking technology and food and beverage services.	Entertainment	Not Engaged Yet Alternative Players
	Skill Development	Indoor hitting bays with a graphically simulated driving range or golf course that include club fitting, ball and swing tracking technology.	Ball Hitting Learning Practicing	Not Engaged Yet Alternative Players
Mini Golf	Entertainment	An artificial grass putting course where each unique hole may involve negotiating an obstacle with a combination of elevation changes and surface types.	Entertainment	Not Engaged Yet Alternative Players

GolfAustralia

Australian Golf Centre
Sandringham Golf Links
Cheltenham Rd
Cheltenham Victoria 3192

(03) 9626 5050

info@golf.org.au

www.golf.org.au