

2022-2025

THE INAUGURAL NATIONAL STRATEGY FOR AUSTRALIAN GOLF



### FOREWORD

#### Dear golfers,

On behalf of Golf Australia, the PGA of Australia and the WPGA Tour of Australasia, we are delighted to introduce the inaugural Australian Golf Strategy.

We are excited about what is ahead for our sport, and about the plan that we have developed with the input of nearly 10,000 people across golf, as well as industry research and expertise. One of the most consistent messages that we have heard over the past six months of consultation has been a sense of genuine excitement about the future of golf, and the opportunity that we have to grow our great game for the benefit of generations of golfers to come.

We are motivated by our purpose of encouraging and supporting more Australians 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 within Australian golf 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.

The plan contained on the following pages is clear, ambitious, and achievable if we work together as an industry. This strategy is written by and for our entire sport, from mini-golf to driving ranges and simulator golf, public courses to member clubs.

We hope that you share our excitement about golf's future and we are looking forward to working together closely as we put this plan into action.



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James Sutherland CEO, Golf Australia



Karen Lunn

Karen Lunn
CEO, WGPA Tour of Australia



Gavin Kirkman
CEO, PGA of Australia

### THE CONTEXT-

The past eighteen months have, on a whole, been kind to Australian Golf. Public courses are busier than they have been in years, free bays are few at driving ranges, and many clubs have waiting lists for new members. The changes in behaviour, and perhaps the shift in priorities, in response to the global pandemic have been a factor in an estimated 21% increase in Australian golf participation over the past twelve months.

However, the fact remains that over the prior 20 years golf membership was in a period of protracted decline, falling by around 1% annually while the Australian population grew by between 1-2% each year. This decline followed a similarly lengthy period of sustained growth in golf membership from 1970 until the turn of the century. The share of female members has fallen from around a third to a fifth, and the average age of a club member is 55 for men and 64 for women, far older than Australia's median age of 37. Golfers are wealthier than the average Australian, with that participation strongly correlated with income. Golfers are also much less likely to come from recent migrant backgrounds than the average Australian. We need to add to our existing member base.

Similar demographic data for those playing at public courses, driving ranges, mini golf and simulators does not exist –itself an opportunity to address – however it is clear that the common perception of golf, of an exclusive and expensive sport, is matched to an extent in reality. We must challenge this perception, and change this reality. We must attract new golfers by telling great stories focusing on the benefits of our game to health, wellbeing, communities and perhaps most importantly, a sense of achievement and enjoyment. We heard very clearly throughout the development of this strategy that golf is fun, and we need to share that message to grow our game.

Growing golf will mean more rounds at public courses, more demand for membership at golf clubs across the country, more lessons, more fans and more investment in a new set of clubs that will finally fix that slice. We know that prior to the onset of the pandemic nearly half of clubs and facilities across Australia were facing some form of financial distress, and increasing pressure from councils and communities to demonstrate inclusivity, sustainability and a good use of valuable land. Clubs and facilities that have experienced strong growth have been those with a clear customer-oriented approach to great service and forms of golf that people want to play. We are fortunate to have a number of excellent case studies for growth from courses and facilities across Australia and the world.

Growing the game is the best response to the challenges and opportunities that golf is facing, and we believe we have a plan to do so in a way that is sustainable, achievable and will benefit the entire industry.



### THE PLAN

Our strategy is built around three key focus areas, supported by two enablers of growth. Our strategy balances supporting the most passionate club members who comprise the core of Australian golf, with a desire to grow our game by attracting new people to golf, and to support their journey through a lifetime of golf. Inspiring existing, returning and new golfers to play more golf through simple, compelling messages that we share at every opportunity and every channel, especially via clubs and facilities, is critical.

We will support these three priorities by growing golf's fanbase, digital products and commercial value for reinvestment, and we will work together across our industry to align behind our national strategy.



## STRATEGY OVERVIEW

### 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

### **STRATEGIC PILLARS**



Tell our story better



Attract new golfers



Grow our core

### **STRATEGIC ENABLERS**



Attract new fans & grow revenue



Work together

### 2

## TELL OUR STORY BETTER

Our ambition is that golf is seen as a sport for life, and fun for all

### SUCCESS WILL BE MEASURED BY







Reality of Golf



Audience Metrics



Consistency of Message

#### TO ACHIEVE SUCCESS WE WILL

- **1.1** Understand the frequent perception of golf we are fighting: an intimidating, exclusive, rules-bound game for rich old men
- **1.2** Agree simple industry-wide messages to change this, i.e. the 3Ps:
  - (1) Our Purpose: More Australians Playing More Golf
  - (2) Our Philosophy: All Golf Is Golf and All Of Us Can Be Golfers
  - (3) Our Positioning: A Sport For Life and Fun For All
- **1.3** Communicate these messages at every opportunity through every available channel, especially via clubs and facilities. Our goal is to:
  - (A) Galvanise the golfing community to share our love of the sport, hence
  - (B) Attract people to golf, and
  - (C) Encourage a lifelong golfing journey
- **1.4** Support via national marketing and communications strategy focused on digital, social and earned media. This includes:
  - (A) Agreeing final brand strategy and tagline
  - (B) Using the right people to promote participation

     both elite and community golfers and high-profile
    golf-lovers from other walks of life
  - (C) Reviewing all existing events, programs and collateral to ensure alignment with our core messages

## ATTRACT NEW GOLFERS

Our ambition is more Australians playing more golf in all its forms:

All golf is golf & all of us can be golfers

#### SUCCESS WILL BE MEASURED BY



Growth in number of golfers across formats



Female participation



Growth in participation by demographic



Access to alternative formats across
Australia

#### TO ACHIEVE SUCCESS WE WILL

- **2.1** Recognise all formats in a consistent national pathway: mini golf, simulators, driving ranges, short courses, public courses, private courses and Tours
- **2.2** Ensure that at least 80% of Australians have reasonable access to the full range of formats and facilities. Do so via national audit and appropriate partnerships with clubs, councils and private providers
- **2.3** Commit to making all clubs and facilities welcoming environments from entry through enquiry, learning, playing, shopping and hospitality. Adopt a service not compliance mentality, with an emphasis on enjoyment and fun.
- Get more kids, women and families playing golf. Roll out standard national programs for kids, women and families (e.g. MyGolf, Get Into Golf and a family equivalent) in every club and facility where feasible.
- Support new and existing golfers with useful, engaging and coordinated industry digital initiatives e.g. national course/facility and lesson booking system (i.e. OpenTable for golf), building social elements into existing platforms (i.e. Strava for golf), supporting participation initiatives etc.
- Increase participation and visibility of women in all parts of golf. Tailor Vision 2025 to National Strategy and double down on highest priorities



## GROW OUR CORE

Our ambition is that golf clubs & facilities are vibrant, solvent, sustainable community hubs

#### SUCCESS WILL BE MEASURED BY







Financial health of clubs & facilities



Sustainability of clubs & facilities

#### TO ACHIEVE SUCCESS WE WILL

- 3.1 Recognise that clubs and facilities are the core of our sport and the key to our strategy. Ask for their assistance in growing Australian golf by emphasising fun and enjoyment, bringing in more kids, women and families, and providing great service. This is in addition to retaining the Covid, and previous, generations of golfers.
- **3.2** Maintain golf clubs' social licence via two-prong strategy:
  - Community inclusion grow and diversify golf (per Pillar 2)
  - Environmental sustainability develop a whole-of-sport environmental sustainability strategy framework
- **3.3** Engage proactively with Councils, clubs and State governments as relevant in LGAs with greatest threats and greatest opportunities in line with a coordinated government relations strategy
- **3.4** Support clubs and facilities with targeted shared and advisory services
  - Devise national services and systems that make life better for all golfers and clubs, including prioritised digital initiatives
  - Share relevant case studies of best practice through a central portal for all types of clubs/facilities city/regional, professionally-run/volunteer-run, public/private etc.
  - Provide individual club/facility support where need is greatest
- 3.5 Develop golf's workforce both professional and volunteer to deliver great services to their golfing 'customer' in line with the Australian Golf Strategy by implementing the PGA Golf Learning Hub and working closely with ASTMA, GMA and member clubs

## ATTRACT NEW FANS & GROW REVENUE

Our ambition is to inspire Australian golfers with great events & digital products and generate new revenue to reinvest in growth

#### SUCCESS WILL BE MEASURED BY



Fan-friendly summer of golf that grows audience and revenue over time



Quantity & quality of digital engagement



Revenue growth from other sources including industry fo



Success and profile of Australian golfers

#### TO ACHIEVE SUCCESS WE WILL

- **4.1** Confirm ambition, plan and schedule for Australian Summer of Golf including strengthened men's and women's Tours
- **4.2** Aggregate and package key events, commercial and media rights. Sell as one sport to government, media and commercial partners.
  - Aggregation must be based on either a "no worse off" or a risk-sharing financial model so event owners have a reason to participate
- **4.3** Implement prioritised digital and data strategy, including:
  - Developing, buying or partnering with key products to drive golfers' engagement on and off course
  - Growing size and commercial value of first party data
- **4.4** Commercialise entry level programs (nab Auskick model)
- **4.5** Increase long term external funding from benefactors, government and industry partners including via Australian Golf Foundation. Reinvest in:
  - Direct participation programs and/or national marketing campaigns
  - High performance programs to develop the next Australian golfing heroes



## WORK TOGETHER

Our ambition is to grow golf as efficiently, collaboratively and sustainably as possible

### SUCCESS WILL BE MEASURED BY



Reduce fragmentation across the industry



Increase industry data sharing



Increase industry representation

### TO ACHIEVE SUCCESS WE WILL

- **5.1** Continue to align GA, PGA & WPGATA. Includes
  - This all-of-golf strategy
  - Co-location at the Australian Golf Centre (Sandringham) and shared offices where opportunities identified (starting with Queensland)
  - Removal of silos & elimination of operational duplication e.g. organising by function & location
- **5.2** Continue to align States & GA via:
  - This all-of-golf strategy
  - Extending OneGolf where feasible
  - Continuing to build direct links with traditional clubs, public courses & private facility operators and ensure they are appropriately represented. Also work with Club GMs via GMA.
- **5.3** Continue to use AGIC as the key all-of-industry forum
- Maintain national reach & footprint but remove layers& silos where possible
- 5.5 Create means of representation for private and public facilities not currently within administrative structure of golf (e.g. mini golf, ranges)



















