

BIG SWINGS 2026-2030

THE NEXT EVOLUTION OF GOLF IN AUSTRALIA



THE GAME HAS COME A LONG WAY IN

FIVE GREAT YEARS OF GOLF



2025

17% Off-course venues growing at a 17% annual rate

10% Adult participation rising at a 10% annual rate

5% Fan base expanding at an 5% annual rate

STEADY

No change in total number of golf courses

DEAR GOLFERS,

We are pleased to introduce the next evolution of the strategy for golf in Australia.

Golf is in great health both here and around the world. Golf is being enjoyed in more places, in more formats, and by more people than ever before. Driving ranges, public courses, simulators, indoor entertainment venues and clubs are busy. The stories we hear from across Australia tell of a game full of energy, positivity and possibility.

This is an opportunity we do not take for granted. We know that the people entering golf today are different from the generations before them. They are looking for flexibility, fun, community, connection and experiences that fit. We understand that Australia itself is changing culturally, demographically and socially in ways that create both opportunities and responsibilities for our sport. Golf has always balanced a deep respect for tradition with an eye to the future, and maintaining this balance is critical in the years ahead.

This next evolution of the strategy gives golf in Australia a clear sense of direction. It invites us to preserve the traditions that make golf special while - most critically - being guided by the voice of the golfer: those already in the game, those interested in joining, and those generations to come. It reinforces our belief that all golf is golf, and that all of us can be golfers, whether we play nine holes at a club, hit balls at a range, play in a simulator, attend a world class event or enjoy one of the many other ways to experience the game. This diversity of formats is one of golf's greatest strengths and a key reason it is truly a sport for life.

Importantly, this is the next evolution of a national strategy for all of golf in Australia. It reflects the shared views and priorities of thousands of golfers as well as organisations across the industry who collaborated on its development, including Golf Australia, the PGA of Australia, the WPGA Tour of Australasia, GMA, club and venue administrators and partners from the golf community. Each organisation will interpret and activate this strategy through its own plan, while being united by a common purpose: putting the golfer first, and making golf welcoming, inspiring and enjoyable for all.

We are often asked: "If golf is already growing, why focus on growth?"

Because as golf grows, it is changing. New golfers are choosing new ways to play. Clubs and venues are facing pressure in some areas and finding opportunities in others. And, because diversifying our participation base across gender, culture, age and background is essential for the game to continue reflecting Australian society and values. These are not preconceptions; they are what thousands of Australians have told us via surveys, interviews and workshops as we have worked together to evolve the strategy.

This strategy sets out the vision and direction for golf in Australia, including enablers and Big Swings that will guide the industry. It is a commitment to working together, continuing to share golf's stories, create great experiences, strengthen the places and spaces where golf happens, deliver inspiring events and tournaments, and empower the workforce at the heart of the game.

We look forward to working closely with you as we seize the opportunities this next evolution of golf in Australia presents.



James Sutherland
CEO, Golf Australia



Gavin Kirkman
CEO, PGA of Australia



Karen Lunn
CEO, WPGA Tour of Australasia



DEVELOPING OUR STRATEGY TOGETHER

This booklet sets out the next evolution of the strategy for golf in Australia. It is our shared strategic roadmap to build on the game's growth and prepare golf for the future. It explains where we are going and how we will get there together.

It is a strategy for the whole game, shaped by national and state bodies, clubs, venues, coaches, volunteers, industry partners and the wider golfing community. It sets a clear direction for golf in Australia and identifies the pillars, enablers and Big Swings that will guide growth.

The strategy was developed collaboratively, informed by thousands of people across golf through surveys, workshops, working groups and interviews.

Each organisation involved in golf in Australia will use this strategy in its own way. Golf Australia, the PGA of Australia, the WPGA Tour of Australasia, GMA and other industry partners will interpret and activate this plan through their own strategies and operational plans.

We understand and acknowledge clubs and venues will also use it in whatever ways make sense for them.

The goal is not uniformity; success is ultimately alignment around what matters most.



12,000+

Public survey responses



80+

Stakeholder interviews



6

Cross-industry working groups



300+

PGA professionals surveyed

THE RISING TIDE FOR GOLF IN AUSTRALIA

RECREATIONAL GOLFERS

Golf will be easier to access, enjoy and fit into your life

GOLF CLUB MEMBERS

A fuller member experience with stronger communities, better venues and a greater say in the future of your club

OFF-COURSE VENUES

Recognition and inclusion as a core part of the golf ecosystem

PGA PROFESSIONALS

Professionals will be better able to enhance every golfer's experience through coaching excellence, knowledge, and passion

FUTURE GENERATIONS OF GOLFERS IN AUSTRALIA

A game that's ready for you.

GOVERNMENT & PUBLIC LAND OWNERS

A clearer, more coordinated case for golf as a community asset

CLUBS & COURSES

Practical support to plan for growth, manage capacity and respond to changing expectations that elevate the golf experience

COMMERCIAL & INDUSTRY PARTNERS

A more aligned industry unlocking shared growth, partnerships and investment

GOLF IS GROWING

Golf in Australia has never been bigger or stronger. More than 4 million Australians now play golf in some form at courses, driving ranges, simulators and mini golf venues. Golf is the country's biggest adult participation sport.

Club membership continues to grow strongly, and every national participation program is at record levels. PGA Professionals are engaged around the country, delivering the vast majority of participation programs and contributing to the quality of experience of all golfers.

Elite golf events are inspiring and entertaining millions of people in Australia and around the world. The Challenger PGA Tour and the WPGA Tour are growing in prize money and international stature.

The benefits flow well beyond the fairway.

An AGIC-commissioned report found golf generates billions in annual benefits to Australian communities, the economy and the environment through health, tourism, employment, and household spending on the game.



4M

The number of adults now playing golf



477K

Total club members



\$15M

Tour Prize money



2.5K

PGA members



1.8M

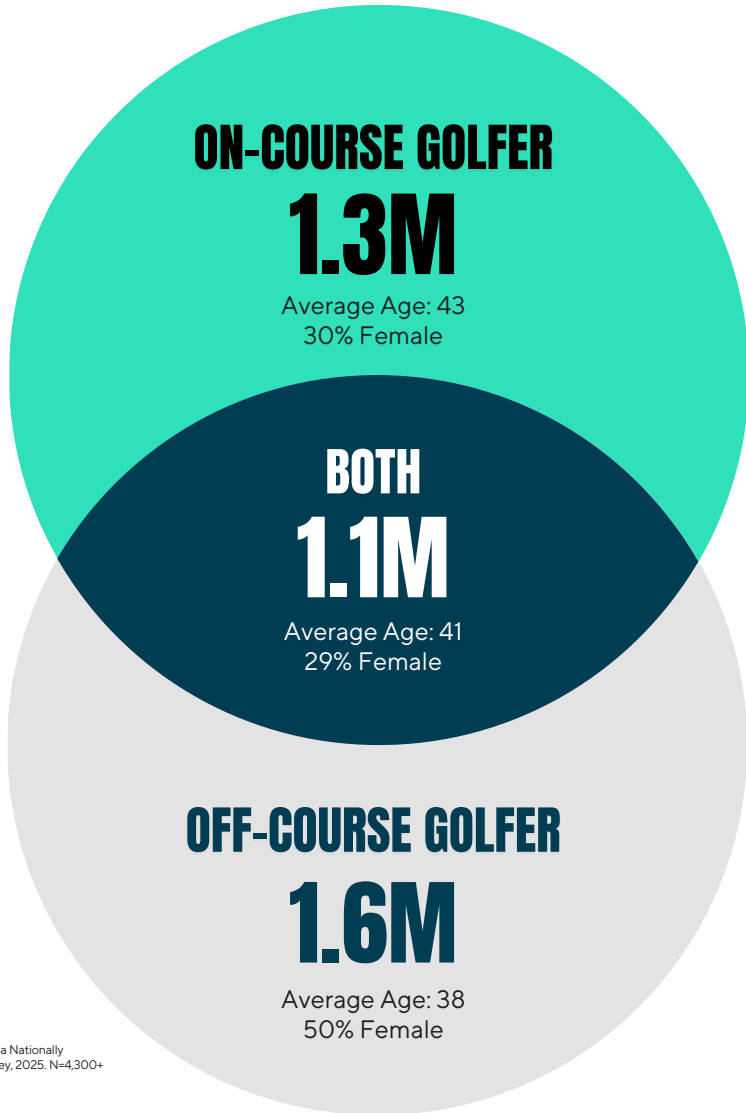
Non-member round players



550+

Off-course venues





Source: Golf Australia Nationally Representative Survey, 2025. N=4,300+

GOLFERS ARE CHANGING

Growth is changing who plays golf, how they play, and what they expect from their experience. Off-course participation now exceeds on-course, with a higher proportion of women and younger players from a wide range of backgrounds. We know from our research that these golfers value flexibility, social connection and experiences that fit busy lives. They are looking for a place where they feel they belong.

Yet while participation numbers are encouraging, converting these new entrants into on-course golfers remains one of the sport's most pressing opportunities.

New members skew significantly younger than the existing base, and virtual/social club memberships have become one of the sport's most powerful entry points,

growing at more than triple the rate of traditional memberships in recent years.

Women are leading much of this change, making up the overwhelming majority of Get Into Golf participants and an increasing presence at every level of the game from the WPGA Tour to the Australian Golf Foundation's Junior Girls Scholarship Program.

Golf continues to welcome people from different backgrounds into the sport with a rising proportion of people completing participation programs born overseas. Golf's ability to welcome these communities is essential to the long-term health of the game.



41%
Of new club members are under 35



112%
Junior memberships have doubled in the last 5 years



60%
Of new golfers in the last 2 years are women



3X
Virtual/social memberships growing faster than traditional



88%
Of Get into Golf participants are women



11 YEARS
New golfers are 11 years younger on average than existing golfers

AUSTRALIANS WANT DIFFERENT THINGS FROM THEIR GOLF EXPERIENCE



Ying is 38. He loves golf but it can be a struggle to find the time between family and work. When he does make the time, he wants his golf to be flexible, close to his house and easy to access. He plays at his local public course and a new simulator that has opened nearby.

More than 900k Australians prioritise golf that fits into their lives.

Ying wants his golf to be... flexible, fun, easy to access and tech-enabled



Ruby is 18. She's at university, plays a mix of sports and is heavily influenced by friends and social media. She's not sure golf is "for her" yet, but she is open to it if it feels fun, social and welcoming. She'd try golf in a group setting, especially if it's relaxed and doesn't feel too serious.

More than 240K young Australians are open to trying golf, but only if they feel its welcoming, social and fun.

Ruby wants her golf to be... social, welcoming, fun and low commitment

Saranya is 31. She works in project management and recently picked up golf after one of her friends raved about it. She's enjoying the challenge and the health benefits, but having fun with her friends is what keeps her coming back for more.

More than 500K Australians nominate 'fun' as the most important thing about golf.

Saranya wants her golf to be... fun, social, welcoming and challenging



Steve is 66. He's semi-retired and plays at least once a week at his club. Golf gives him time each week to challenge himself, connect with his friends and spend time outdoors. He wants to play more often and is seeking to improve his game at every opportunity.

More than 1M Australians want to play more golf, more often, more competitively.

Steve wants his golf to be... physical, challenging and good for his mental health



The Simpson Family. They are a busy household with kids of varying ages. Weekends are precious and revolve around finding new activities to do together. They are looking for multi-generational fun that is easy to organise and takes no longer than 2 hours.

More than 900K Australians prioritise golf that they can play across the generations of their families.

The Simpsons want their golf to be... welcoming, approachable, affordable and flexible



Will is 27. He works full-time juggling a career, fitness and a social life. He is looking for activities that are flexible, enjoyable and fit around a busy schedule. Golf appeals as something different - part social, part skill building - but only if it is easy to access and doesn't require a full day commitment.

More than 700K Australians in their 20s prioritise activities that are flexible, social, and fit around their lifestyle.

Will wants his golf to be... flexible, convenient, social and challenging

THE PLACES WE PLAY ARE EVOLVING

The places where golf happens are evolving in response to golfer expectations.

Competition for leisure time continues to increase, and clubs and venues that focus on understanding and serving the golfing 'customer' will outperform.

Member clubs are now joined by a growing ecosystem of driving ranges, simulators, golf entertainment venues, virtual and social clubs serving golfers in new ways. Growth creates capacity challenges at peak times at some venues, while others - particularly regional venues - have room to welcome more golfers.

Many clubs are responding with confidence, with a majority of GMA members planning significant facility upgrades. Some clubs are also looking at more flexible membership options and shorter formats to maximise capacity.

Golf's workforce makes all of this possible. PGA Professionals, general managers, course superintendents, and volunteers are the backbone of the game.

More golfers means more pressure on the paid and volunteer workforce. Industry programs like ASTMA's Future Turf Managers' Initiative, GA's Club Governance Program and the PGA's suite of programs like the Member Pathway Program are building the capability golf needs to match its growth.

Local communities and governments increasingly expect golf land to deliver clear public value including access to social, economic, health and environmental benefits.

Golf's future will be shaped by how well the industry invests in its places, its people, and its purpose.



1.4K

Golf Courses nationally



60%

Of GMA member clubs planning facility upgrades



13K+

Volunteer club directors



30K+

Total golf workforce

BIG SWINGS 2026-2030: THE NEXT EVOLUTION OF GOLF IN AUSTRALIA

OUR PURPOSE

More people playing more golf

OUR POSITIONING

A sport for life & fun for all

OUR PHILOSOPHY

All golf is golf & all of us can be golfers

Golf is growing & changing, we're taking **BIG SWINGS** by 2030 ...

EVOLVE

All 1,800+ golf courses and venues commit to a plan to continue to evolve experiences for the modern 'golfing customer'

BELONG

100% of people in the golf community feel they belong - particularly women & families

CONNECT

1 million more people will be connected across golf as they learn, play & follow the game

CORE PILLARS



Golfers play the game on their terms, with modern coaching, flexible formats & a clear path to enjoying a lifetime of golf



Clubs, courses & venues are growing in number, thriving, sustainable & inclusive, supported by modern governance



Golf fans are inspired by world class events & Tours, the chance to compete themselves & great stories about golf & golfers

STRATEGIC ENABLERS

Attract, retain & educate **great people**

Grow the \$10 billion **golf economy**

Elevate the voices of **underrepresented groups** in shaping the future of golf

Use **technology** to make golf easier to run & more fun to play

Collaborate to grow & deliver the strategy



ALL 1,800+ GOLF COURSES & VENUES COMMIT TO A PLAN TO CONTINUE TO EVOLVE EXPERIENCES FOR THE MODERN 'GOLFING CUSTOMER'

Golfers' expectations are evolving. Leisure time remains at a premium, and competition among sports and entertainment options is fierce. Shorter, flexible formats and social forms of golf are growing rapidly in Australia and around the world. At the same time, many courses and venues face capacity constraints during peak periods.

Growth plans that consider new membership models, formats and venues

(including mini golf, a range, simulators, and non-golf recreation options) will strengthen their sustainability, guide investment and enable the game's infrastructure to serve the golfers of today and tomorrow.

This strategy will support clubs and venues that want to continue to evolve their businesses with shared insights, connections across the industry and a commitment to telling golf's story at every opportunity.

WHAT IS SUCCESS?



More ways to play at existing courses & venues



More capital investment as courses & venues are connected to funding



More golfers hitting more golf balls



Better experiences by for existing & new players



More capacity in the existing golf footprint



More sustainable courses & venues



100% OF PEOPLE IN THE GOLF COMMUNITY FEEL THEY BELONG - PARTICULARLY WOMEN & FAMILIES

Golf is still not perceived as welcoming or inclusive by a large proportion of Australians, particularly women and families.

Perceptions of exclusivity remain a real barrier, and these groups continue to be underrepresented, despite strong participation growth for the sport as a whole.

This underrepresentation is particularly stark among communities that have not traditionally been big golfers.

By listening to the ways that women and families tell us they want to play golf, and creating places to play that promote genuine belonging, golf can set itself up for generations of growth.

WHAT IS SUCCESS?



More women playing golf more often



More families playing golf together



Clubs & venues increasingly reflect their communities



Greater satisfaction with golfing experiences



More courses & venues offer a greater range of formats of golf



Women make up a greater proportion of golf venue boards and committees



1 MILLION MORE PEOPLE WILL BE CONNECTED ACROSS GOLF AS THEY LEARN, PLAY & FOLLOW THE GAME

Millions of Australians play golf regularly, yet many experience the game as fragmented and difficult to navigate. Golf offers a wide range of experiences across courses, ranges, simulators and coaching, but these aren't always connected in a way that helps people easily find the right path for them.

For new and returning golfers in particular, clearer guidance on how to get started, progress and choose what suits them may make the experience more accessible and enjoyable.

This strategy shifts the industry toward collective ownership of the experience of these golfers.

By listening, sharing insights and connecting people to the right places to play and learn, more Australians will play more golf and foster a lifelong love of the game that benefits everyone in the sport.

WHAT IS SUCCESS?



More people are connected to the places they play



There are clear & well understood participation pathways



Better digital tools link golfers to golf



More detailed and actionable industry insights are available to decision makers



All golf venues work together to grow the game



More people consuming and sharing golf content

KEY ACTIVITIES TO HELP THE INDUSTRY DELIVER THE STRATEGY

These are the activities we are committed to delivering that will shape the future of the game over the next five years. Some will be led by a single organisation; others will require the industry to move together. As strategy moves into action, we will be clear about who is responsible, how it is resourced, and how we measure what matters most.

**NO KEY ACTIVITY SITS ON ITS OWN.
EACH ADVANCES EVOLVE, BELONG, OR CONNECT**



PILLARS

GOLFERS

- Deeply understand the 'golfing customer' – how do they want to learn, play and grow their life with golf
- Deliver great coaching to existing and aspiring golfers, tailored to their preferences
- Engage women and families to understand what they want from golf and act on what we hear
- Connect new golfers to the golf experiences they want to have, growing and diversifying the game

CLUBS, COURSES & VENUES

- Equip clubs and venues with the templates, guidance, and support they need to develop strong customer plans
- Improve how we capture and share golfer engagement data, turning insights into better business decisions for clubs and venues
- Champion modern governance practices across regional and metropolitan clubs

GOLF FANS

- Identify and attract the best golfers to Australian tournaments and champion Australia's best on the pathway to Brisbane 2032
- Continue to tell golf's story at every opportunity through every available channel
- Evolve the events schedule and structure to align with the national strategy and grow their appeal to existing and new fans
- Deliver a compelling All Golf is Golf campaign that celebrates the fun, social, and inclusive side of the sport

ENABLERS SUPPORT DELIVERY ACROSS EVERY PILLAR

WORKFORCE

1. Develop high-quality education and development programs that prepare golf's workforce for success
2. Support people to undertake these programs, aligned with their development goals
3. Coordinate across organisations to attract and retain great people in golf

GOLF ECONOMY

1. Identify new revenue streams to support the financial sustainability of golf
2. Encourage and enable greater investment in golf venues

COMMUNITY

1. Elevate, listen and respond to the voices of diverse groups across the golfing community
2. Advocate strongly to secure golf's future as a valuable use of public land
3. Develop a sustainability plan and coordinate local action aligned with its ambitions

TECHNOLOGY

1. Establish an innovation fund with co-investment from the industry
2. Respond to golfers' expectations of useful and simple digital products that improve their golf experience
3. Explore whether AI is an opportunity, including to drive operational efficiency and effective customer service

COLLABORATION

1. Bring together the entire golf industry to deliver this strategy, including off-course venues
2. Explore how to better connect off-course golfers to the on-course golf experience

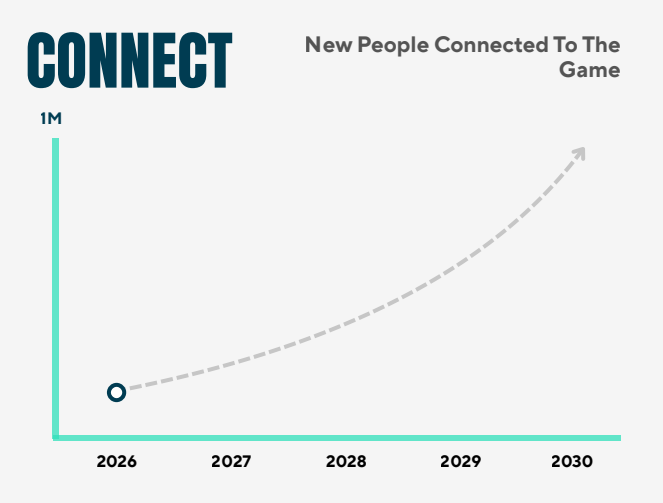
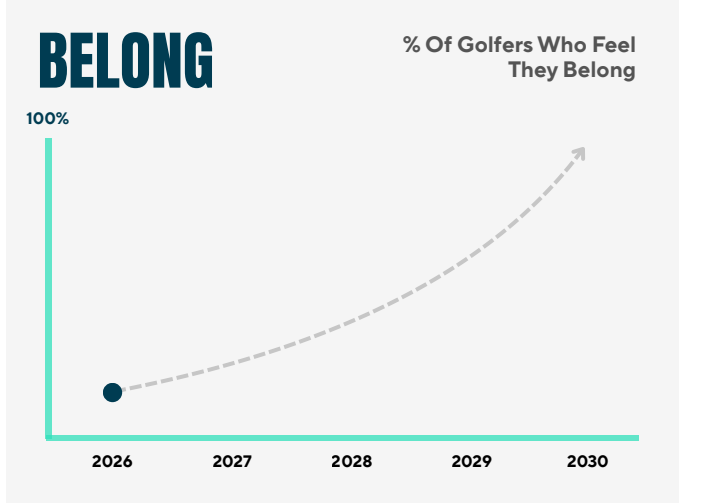
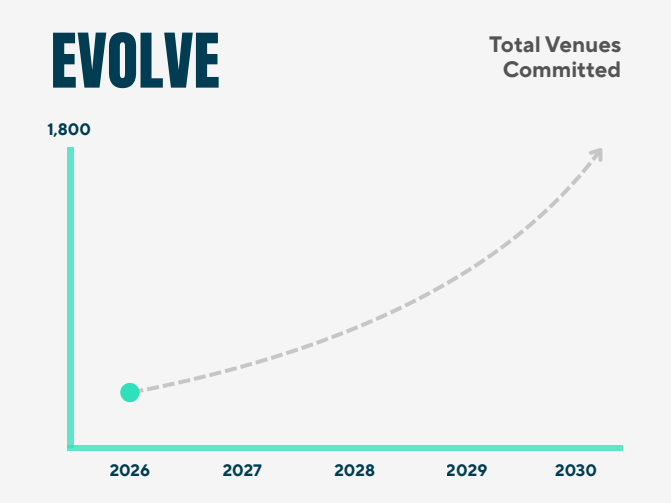


MEASURING THE SUCCESS OF THE STRATEGY

We're tracking three primary metrics at the heart of this strategy, supported by a set of supplementary metrics that together give us the full picture. We are committed to transparent reporting on our progress; the dashboard below gives you a sense of what this reporting will look like as we put our words into action.



PRIMARY METRICS Data to be reported over the next five years



SUPPLEMENTARY METRICS

- Capital investment activated
- New format offerings introduced
- % of clubs in financial distress
- Golfer satisfaction score

- % of women & families who feel welcome
- Women's participation rate
- % of clubs & venues with active women's & family programs
- Diversity of golf membership

- Conversion rate from first experience to repeat play
- Completion rate of defined golfer pathways
- Digital connection rate
- Off-course to on-course conversion

WHAT NEXT?

USE

Use this next evolution of the strategy for golf in Australia to inspire and inform your own strategic plans for your club, facility, retail or golf experience.

SHARE

Share this booklet with your colleagues and contacts. Many people in golf have already contributed to this strategy, sharing it with even more people can only help us grow the game together.

TELL US

Tell us what you think about the strategy and how you will use it by answering a few simple questions. Snap the QR code or follow this link.



PGA
AUSTRALIA

WPGA TOUR
AUSTRALASIA

 **GOLF**
AUSTRALIA

AGIC
Australian Golf Industry Council

 **golfwa**

 **GOLF NSW**

 **GOLF**
NORTHERN
TERRITORY

 **GOLF**
QUEENSLAND

 **GOLF**
SOUTH
AUSTRALIA

 **GOLF**
VICTORIA

 **GOLF**
TASMANIA