

Golf Participation in the U.S.

2016 Edition





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INTRODUCTION

2015 Golf Participation in the U.S. – A slight dip tempered by strong positive indicators

Twenty years after Tiger Woods stepped before a microphone in Milwaukee on Aug. 28, 1996, and with the words “Hello, World,” touched off the most meaningful golf industry growth since Arnold Palmer and President Eisenhower jump-started it 40 years earlier, there are reasons to be confident about the stability of the game. While the latest NGF participation numbers show a slight dip in 2015 to 24.1 million (over the age of 6 who played at least once) from 24.7 million the two previous years, numbers remained strong in several crucial areas: among committed golfers, beginning golfers and in the number of people interested in taking up the game.

While the total drop in golfers from 2014 to 2015 was within the national study’s statistical margin of error, the results do suggest that a slow leak in overall participation persists. However, NGF analysis continues to show that attrition is confined mainly to those who never really got into the game.

About 80 percent of all golfers, or 20 million of the 24.1 million, make up a committed base who accounted for over 92 percent of all rounds played and a similar level of equipment spending in 2015. Play among this group drove an overall increase in rounds played of 1.8% versus 2014, as reported by the National Rounds Played Coalition (comprised of NGF, Golf Datatech, PGA of America and NCGOA).

The twenty-somethings like Jordan Spieth, Jason Day, Rickie Fowler, Lexi Thompson and teenager Lydia Ko appear to be resonating. Beginners numbered 2.2 million in 2015, which compares favorably to the all-time high of 2.4 million in 2000, at the peak of Woods’ success when he won three major championships. And the biggest group of beginners in 2015 were Millennials.

Interest in playing golf is at an all-time high with an estimated 37 million non-golfers saying they are interested in taking up the game. And roughly 20 percent may already be making their first moves. In addition to the 24 million people who played golf on a golf course last year, another 7 million took part in the game at a driving range, a Topgolf facility or on an indoor golf simulator.

Golf’s overall reach is impressive. An estimated 81 million*, including 62 million non-golfers, watched golf on TV in 2015 while 27 million read about the game in traditional or electronic media. One out of three Americans – about 95 million – played golf on a golf course or alternate venue, watched on TV or read about it in 2015. The interest is there. The challenge is to activate more of the people who are interested in playing, and retain a higher percentage of those who do give golf a try. Getting more beginners to enter the game through structured introduction programs like Get Golf Ready is key to improving retention.

While participation growth remains difficult to achieve, with the recession in the rearview mirror and an exciting new wave of young players in front of us, there are good reasons to be optimistic about future growth if emphasis continues to be placed on converting more beginners into committed golfers.

**81 million is consistent with Nielsen viewership statistics for Americans watching PGA TOUR broadcasts for a minimum of 15 minutes.*



METHODOLOGY

Each year since 1986, NGF has surveyed Americans regarding golf participation. In 2007, NGF joined a partnership of sports associations to cooperatively conduct sports participation research (the Physical Activity Council). The other associations are:

- International Health, Racquet and Sportsclub Association (IHRSA)
- Outdoor Industry Foundation (OIF)
- Snowsports Industries America (SIA)
- Sporting Goods Manufacturers Association (SGMA)
- Tennis Industry Association (TIA)
- United States Tennis Association (USTA)
- USA Football

The Council currently surveys about 30,000 Americans ages 6 and above every year regarding their participation in over 100 sports and fitness activities, including golf. Although the resulting sample closely matches that of the entire U.S. population demographically, a statistical weighting on key Census variables (including age, income, geographic region, etc.) is applied in order to make the sample match the population as accurately as possible.

8.2 percent of the sample indicated that they played golf at least once in calendar year 2015. Those golfers we identify enable us to take an in-depth look at golfer characteristics by age, income, education, etc., and to track the trend in the number of golfers by segment over time.

All statistical samples are subject to a margin of error. The margin of error on the total number of golfers in 2015 (24.1 million) was plus-or-minus 900,000 golfers.

Definition of Terms Used in this Report

Participation Rate: The percentage of individuals ages 6 and above within a given population or demographic segment that played golf, on a golf course, at least once during the survey year.

Core Golfers: Individuals ages 6 and above who played at least eight rounds of golf during the survey year.

Occasional Golfers: Individuals ages 6 and above who played one to seven rounds of golf during the survey year.

Juniors: Individuals ages 6-17 who played at least one round of golf during the survey year.

Beginners: Individuals ages 6 and above that played for the first time during the survey year.

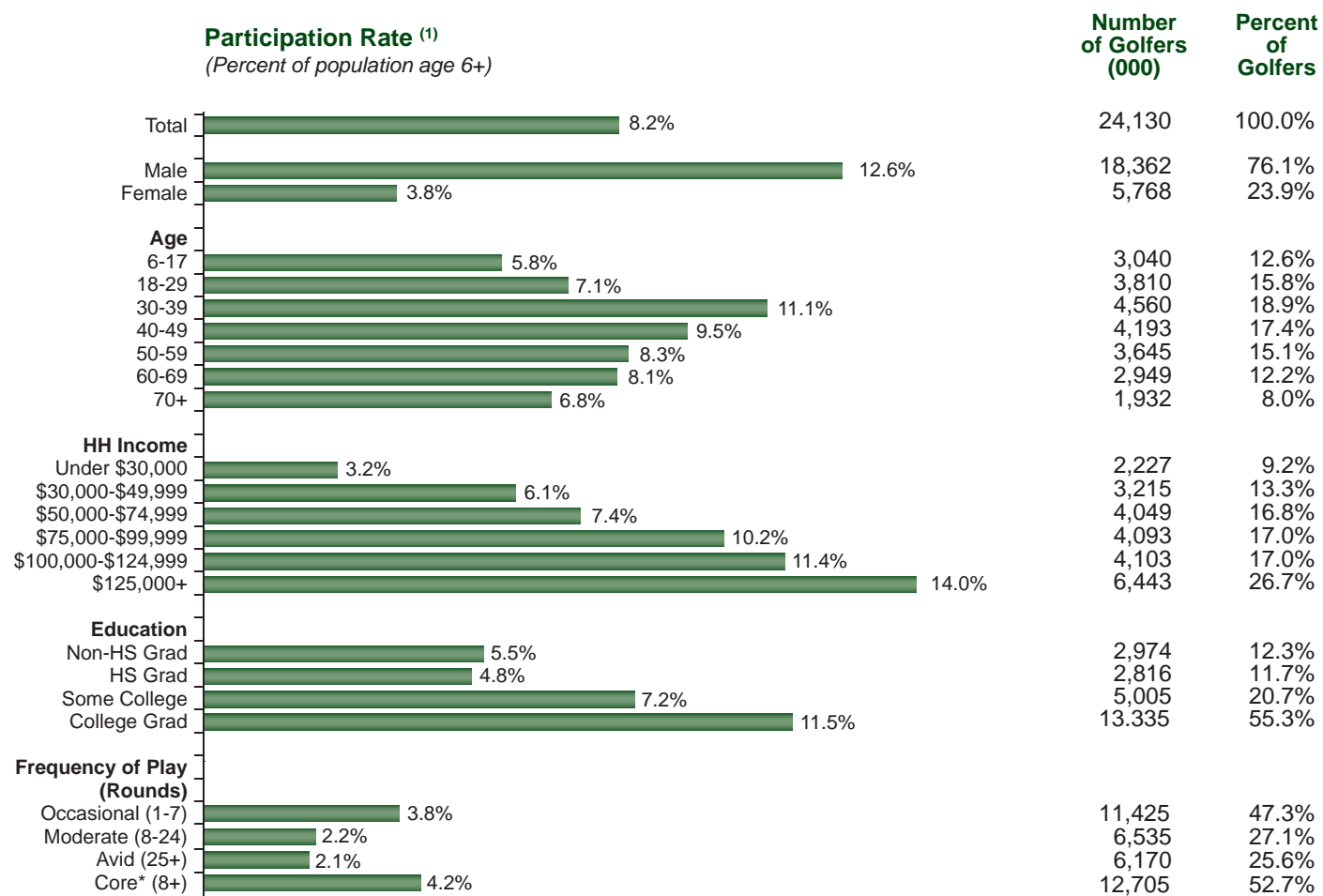
Latent Demand: Individuals ages 6 and above who did not play golf during the survey year but expressed that they were “very” or “somewhat” interested in playing golf now.



ALL U.S. GOLFERS

Number	2010	2011	2012	2013	2014	2015
All golfers age 6+ (in millions)	26.1	25.7	25.3	24.7	24.7	24.1

Averages	Male	Female	Total
All golfers age 6+			
Age	42.9	37.0	41.4
HH Income	\$96,145	\$96,486	\$96,236
Annual Rounds	21.4	13.0	19.3



⁽¹⁾ Percentage of individuals within a given population or demographic segment who played golf at least once during the survey year.

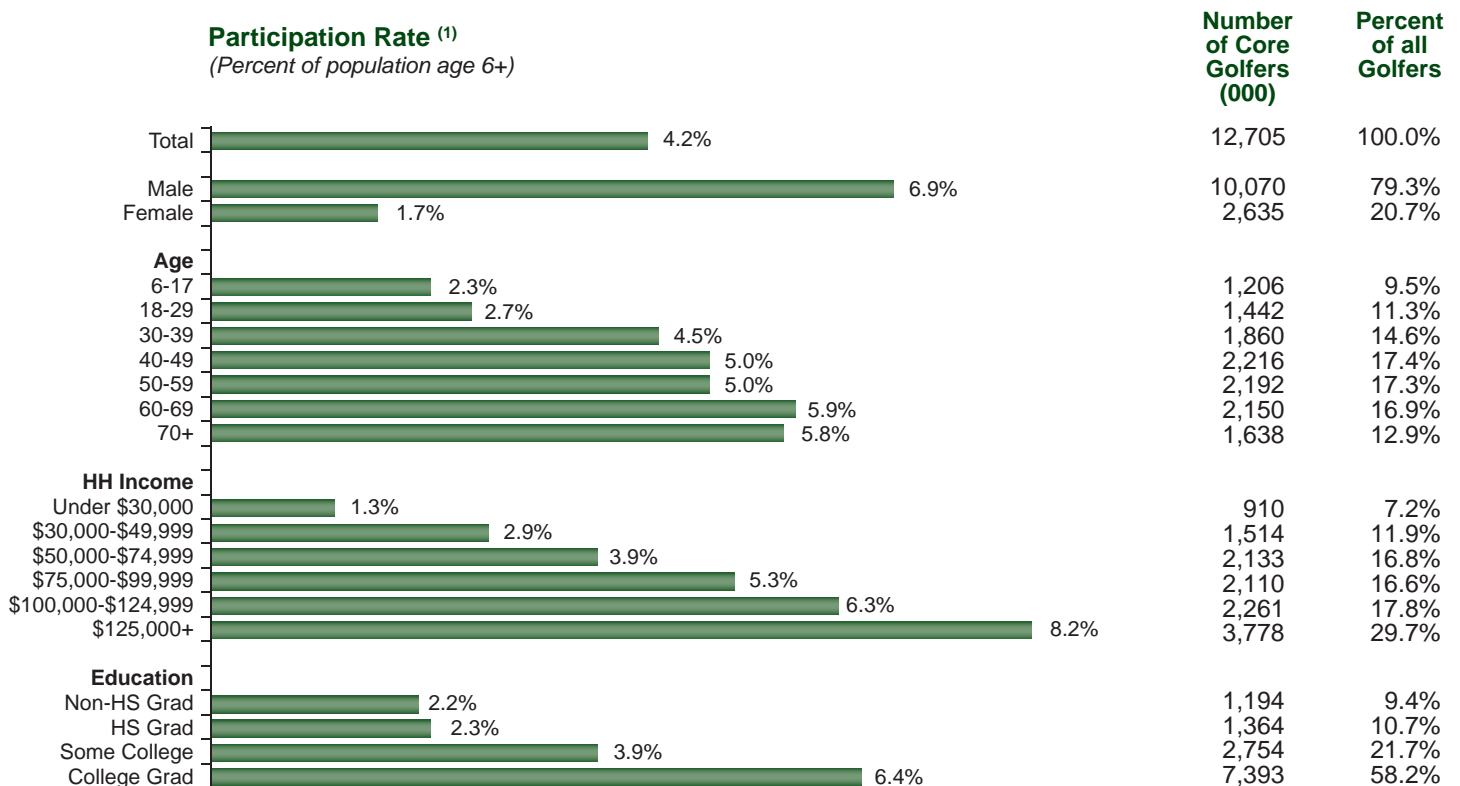
* Core = Avid + Moderate



CORE GOLFERS

Number	2010	2011	2012	2013	2014	2015
Core golfers age 6+ (in millions)	14.8	14.4	13.7	13.6	13.5	12.7

Averages	Male	Female	Total
Core golfers age 6+			
Age	49.1	44.2	47.9
HH Income	\$98,329	\$97,333	\$98,097
Annual Rounds	36.6	25.3	34.2



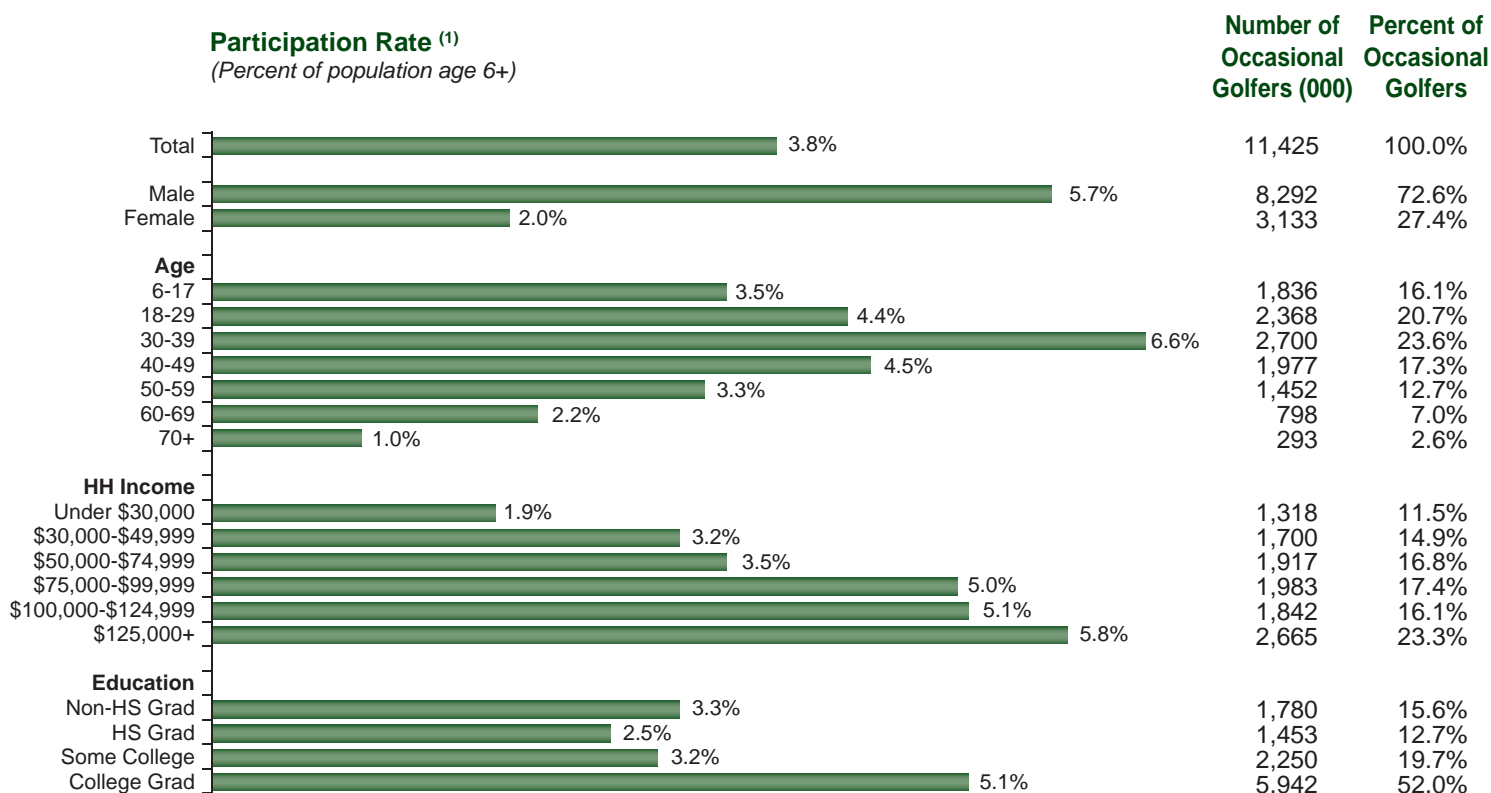
⁽¹⁾ Percentage of the given population or demographic segment who are Core golfers (individuals ages 6 and above who played at least eight rounds of golf during the survey year).



OCCASIONAL GOLFERS

Number	2010	2011	2012	2013	2014	2015
Occasional golfers age 6+ (in millions)	11.3	11.3	11.6	11.1	11.2	11.4

Averages	Male	Female	Total
Occasional golfers age 6+			
Age	36.1	34.7	35.7
HH Income	\$88,000	\$91,800	\$88,600
Annual Rounds	2.8	2.4	2.7



⁽¹⁾ Percentage of the given population or demographic segment who are Occasional golfers (individuals ages 6 and above who played at one to seven rounds of golf during the survey year).

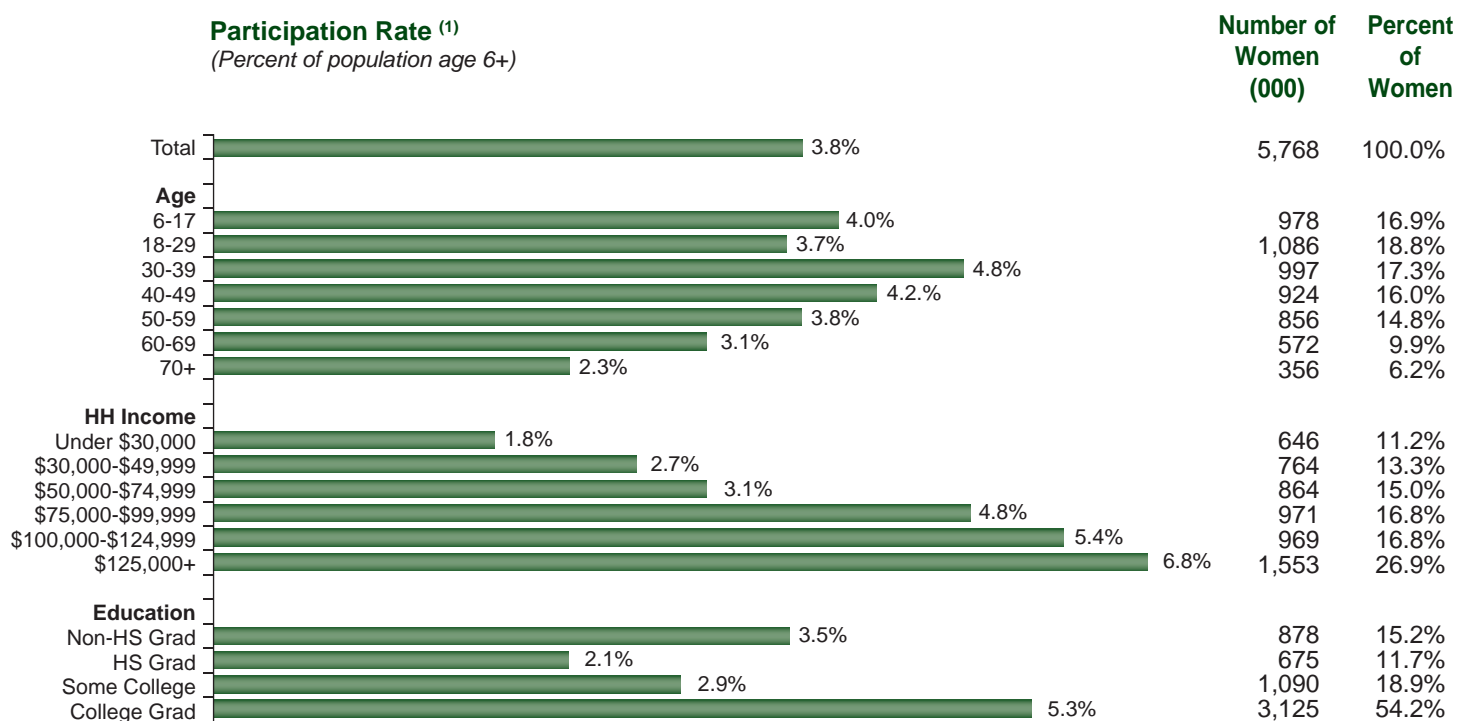


WOMEN

Number	2010	2011	2012	2013	2014	2015
Women golfers age 6+ (in millions)	5.4	5.1	5.0	5.3	5.7	5.8

Averages	
Women golfers age 6+	
Age	37.0
HH Income	\$96,486
Annual Rounds	13.0

Participation Rate ⁽¹⁾
(Percent of population age 6+)



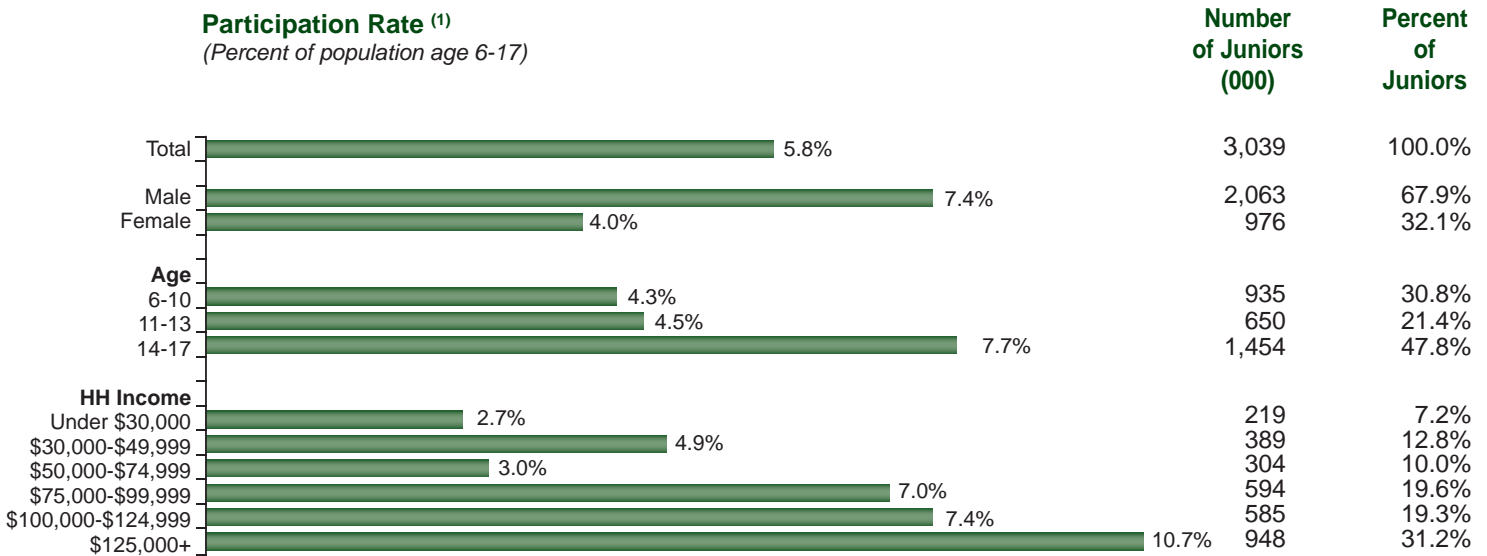
⁽¹⁾ Percentage of the given population or demographic segment who are Women golfers.



JUNIORS

Number						
	2010	2011	2012	2013	2014	2015
Junior golfers age 6+ (in millions)	2.5	2.4	2.7	3.0	3.2	3.0

Averages			
	Male	Female	Total
Junior golfers age 6+			
Age	12.2	11.5	11.9
HH Income	\$110,744	\$100,703	\$106,732
Annual Rounds	9.7	8.0	9.1



⁽¹⁾ Percentage of the given population or demographic segment who are Junior golfers.

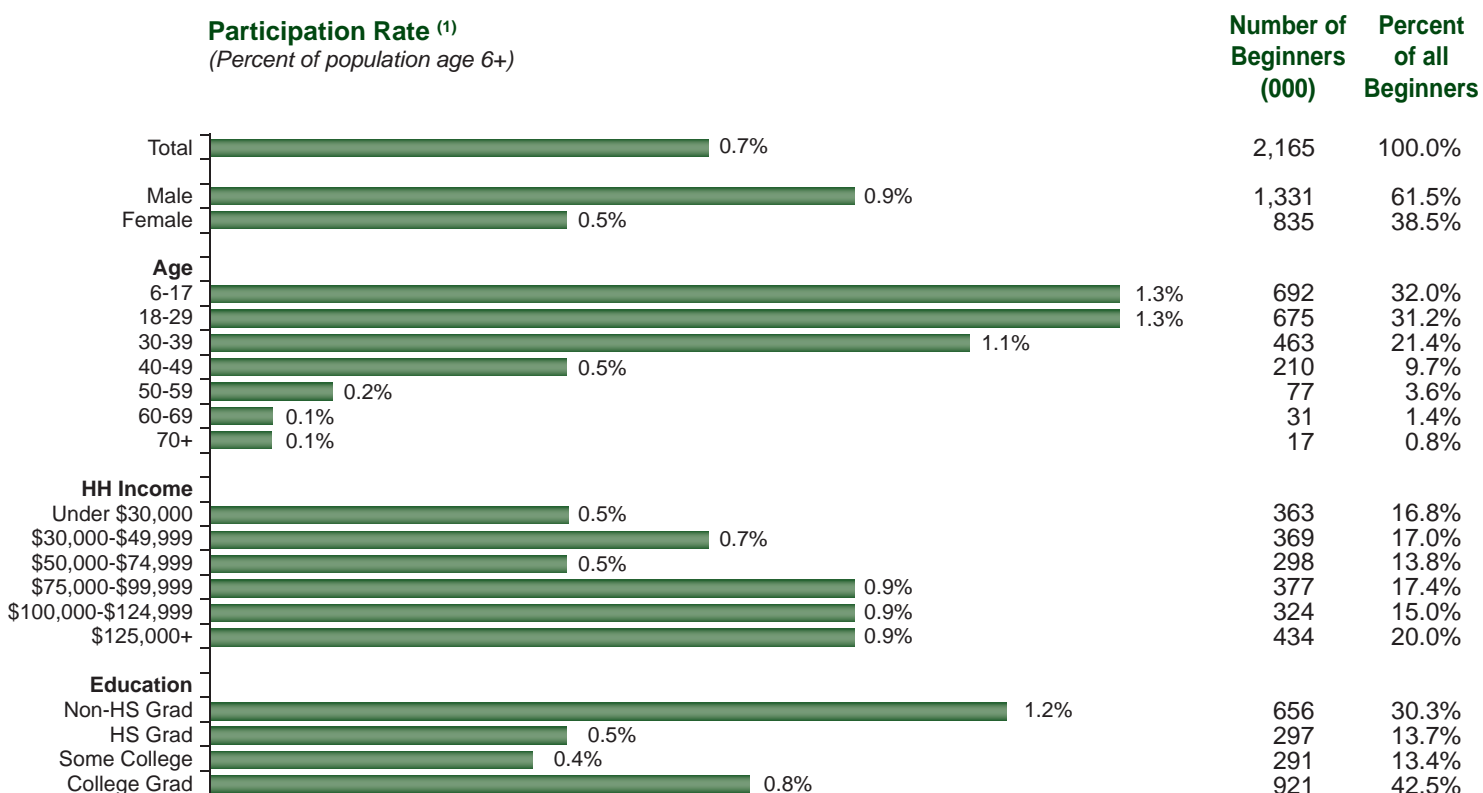


BEGINNERS

Number						
	2010	2011	2012	2013	2014	2015
Beginning golfers age 6+ (in millions)	1.5	1.5	1.9	1.9	2.0	2.2

Averages			
	Male	Female	Total
Beginning golfers age 6+			
Age	27.2	22.1	25.0
HH Income	\$85,700	\$92,700	\$88,700
Annual Rounds	7.4	6.6	7.1

Participation Rate ⁽¹⁾
(Percent of population age 6+)



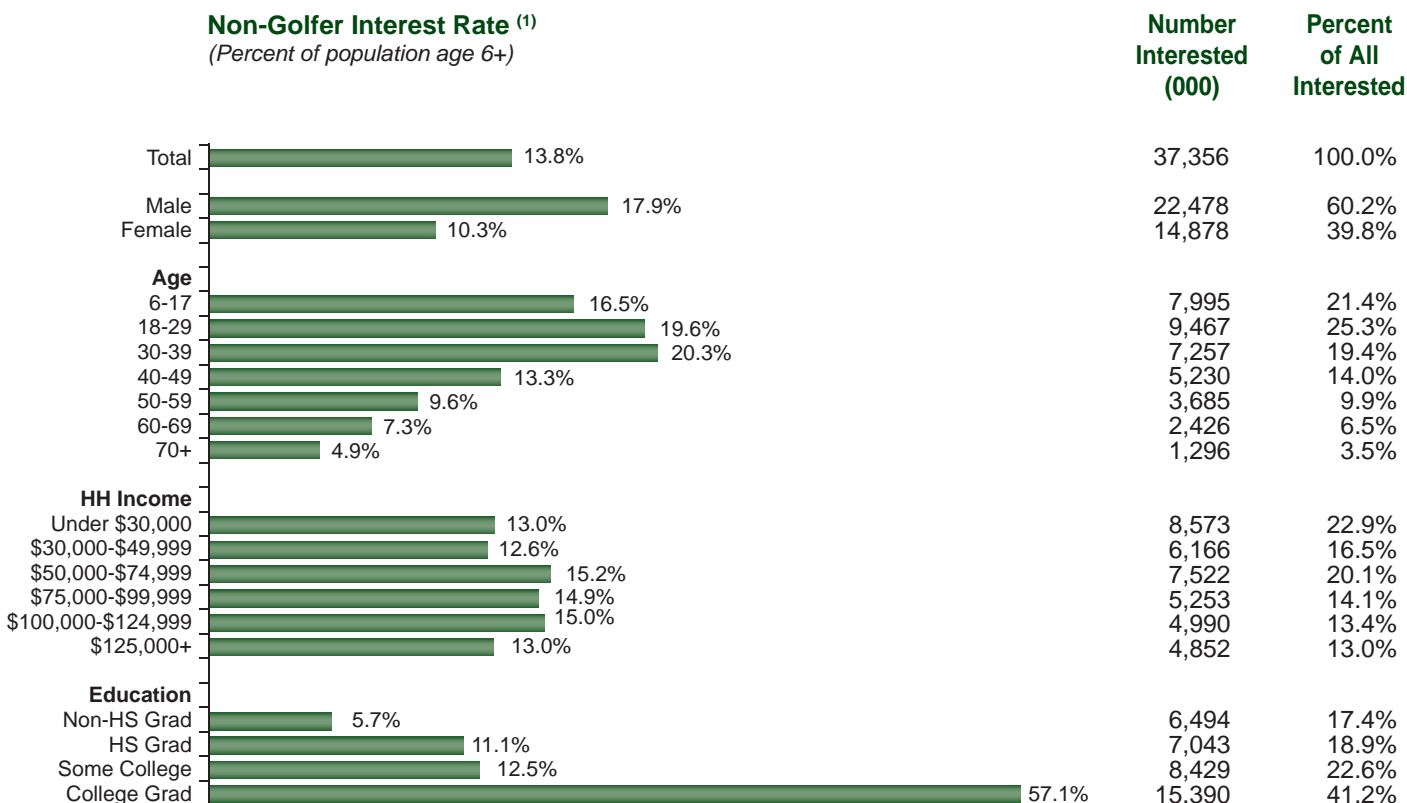
⁽¹⁾ Percentage of the given population or demographic segment who are Beginner golfers (individuals ages 6 and above that played golf for the first time during the survey year).



LATENT DEMAND (Non-golfers interested in playing golf)

Number					
	2011	2012	2013	2014	2015
Interested non-golfers age 6+ (in millions)	26.5	27.4	28.6	32.3	37.4

Averages			
	Male	Female	Total
Interested non-golfers age 6+			
Age	34.2	32.8	33.7
HH Income	\$69,912	\$74,185	\$71,605



⁽¹⁾ Percentage of the non-golfer population age 6+ who did not play golf during the survey year but expressed that they were "very" or "somewhat" interested in playing golf now.



ROUNDS PLAYED

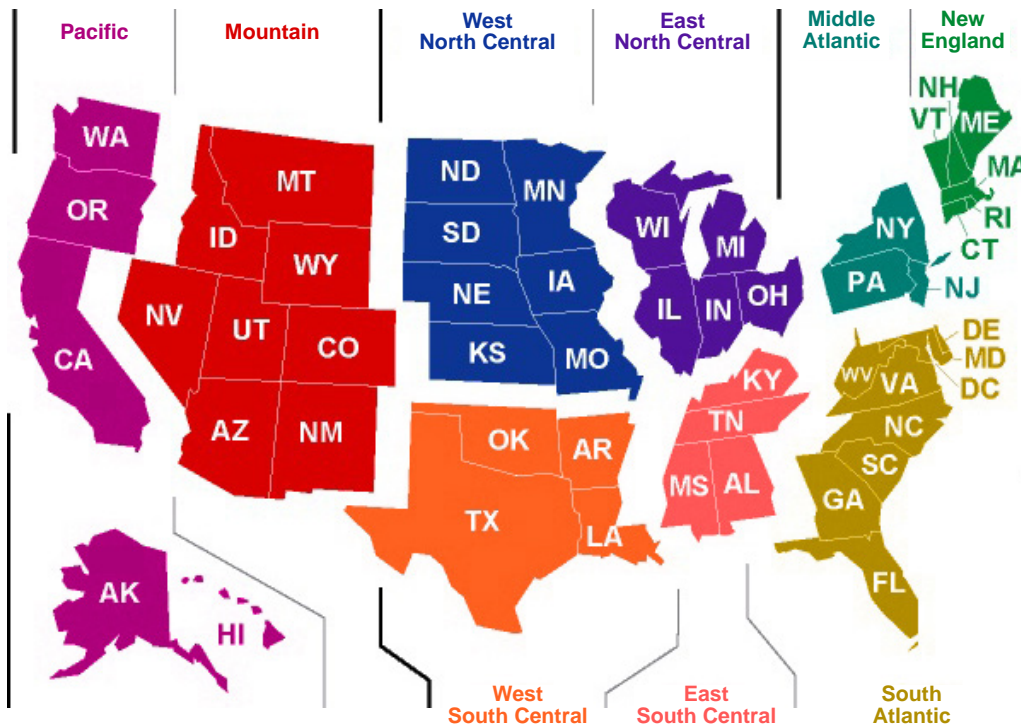
Average Annual Rounds Played	Number of Rounds (MM)	Percent of all Rounds
Total	465.8	100.0%
Male	391.1	84.0%
Female	74.7	16.0%
Age		
6-17	27.7	6.0%
18-29	49.9	10.7%
30-39	56.6	12.1%
40-49	64.1	13.8%
50-59	66.8	14.3%
60-69	102.2	21.9%
70+	98.5	21.2%
HH Income		
Under \$30,000	23.4	5.0%
\$30,000-\$49,999	76.7	16.5%
\$50,000-\$74,999	71.7	15.4%
\$75,000-\$99,999	90.4	19.4%
\$100,000-\$124,999	82.9	17.8%
\$125,000+	120.8	25.9%
Education		
Non-HS Grad	37.6	8.1%
HS Grad	68.9	14.8%
Some College	108.9	23.4%
College Grad	250.4	53.7%
Frequency of Play (Rounds)		
Occasional (1-7)	30.7	6.6%
Moderate (8-24)	84.9	18.2%
Avid (25+)	350.2	75.2%
Core* (8+)	435.1	93.4%

*Core = Avid + Moderate



REGIONAL PROFILES

	Participation Rate	Number of Golfers (000)	Percent of Golfers	Average Annual Rounds	Total Annual Rounds (MM)
New England	9.8%	1,374	5.7%	20.3	27.9
Middle Atlantic	7.8%	3,097	12.8%	16.3	50.4
East North Central	8.8%	3,911	16.2%	17.6	68.8
West North Central	10.3%	2,028	8.4%	15.8	32.0
South Atlantic	7.9%	4,653	19.3%	25.4	118.1
East South Central	6.4%	1,150	4.8%	17.0	19.5
West South Central	6.5%	2,311	9.6%	17.3	40.1
Mountain	8.7%	1,903	7.9%	20.7	39.4
Pacific	7.8%	3,704	15.4%	18.8	69.6
Total	8.2%	24,130	100.0%	19.3	465.8





TOP 10 STATES & METRO AREAS

Golfers

Top 10 States by Number of Golfers	
State	Golfers (000)
California	2,327
Florida	1,588
Texas	1,544
New York	1,373
Illinois	1,193
Ohio	1,175
Michigan	1,095
Pennsylvania	953
North Carolina	721
Wisconsin	697

Top 10 Metro Areas* by Number of Golfers	
Metro Area	Golfers (000)
New York-Newark-Jersey City, NY-NJ-PA	1,321
Chicago-Naperville-Elgin, IL-IN-WI	922
Los Angeles-Long Beach-Anaheim, CA	746
Detroit-Warren-Dearborn, MI	484
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	458
Dallas-Fort Worth-Arlington, TX	438
Boston-Cambridge-Newton, MA-NH	435
Miami-Fort Lauderdale-West Palm Beach, FL	433
Minneapolis-St. Paul-Bloomington, MN-WI	432
Phoenix-Mesa-Scottsdale, AZ	411

Latent Demand (Non-golfers interested in playing golf)

Top 10 States by Number of Interested Non-Golfers	
State	Interested Non-Golfers (000)
California	4,563
Texas	3,037
New York	2,497
Florida	2,445
Illinois	1,574
Pennsylvania	1,488
Ohio	1,391
Michigan	1,160
Georgia	1,107
North Carolina	1,104

Top 10 Metro Areas* by Number of Interested Non-Golfers	
Metro Area	Interested Non-Golfers (000)
New York-Newark-Jersey City, NY-NJ-PA	2,601
Los Angeles-Long Beach-Anaheim, CA	1,669
Chicago-Naperville-Elgin, IL-IN-WI	1,220
Dallas-Fort Worth-Arlington, TX	865
Washington-Arlington-Alexandria, DC-VA-MD-WV	793
Miami-Fort Lauderdale-West Palm Beach, FL	780
Houston-The Woodlands-Sugar Land, TX	771
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	768
Atlanta-Sandy Springs-Roswell, GA	670
Boston-Cambridge-Newton, MA-NH	644

* Metropolitan Statistical Area (MSA)