The Truth About Millennial Golfers

Millennial Golfer Survey

Fall 2017

a research initiative by

GLOBAL GOLF ADVISORS

globalgolfadvisors.com

in collaboration with

NEXTGENGOLF

nextgengolf.org

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I. OVERVIEW

Will Millennials join private clubs? Do Millennials care about amenities? How much are Millennials willing to pay for golf? In the private club world these questions are commonplace for managers, club boards, membership sales staff, and anyone charged with the duty to continuously fill the club's membership pipeline with 'new blood'.

Research initiatives have pounced on the club industry's need for data surrounding Millennial habits, preferences, and wallets. Excellent reports have been published by organizations such as the Club Managers Association of America (CMAA) and the National Golf Foundation (NGF). GGA recently teamed up with Kris Hart and Matt Weinberger of Nextgengolf to gauge just how many 'degrees of separation' there are between Millennials and private clubs.

If you didn't already know, Nextgengolf is *the* leading entity for Millennial golfers 18 to 39 years old in the United States. Nextgengolf is an inclusive organization with the mission to provide golfing opportunities, keep golfers in the game, and make the game of golf more relevant for college students and young adults. In essence, Nextgengolf strives to fill a gap largely ignored in the industry by helping thousands of golfers stay engaged through the 185+ tournaments organized and executed each year.

A fusion of GGA's 25-year history of private club research and Nextgengolf's profound relationship with young golfers afforded a **survey of more than 1,000 avid Millennial golfers** who were asked about their golfing habits and stance on private club memberships. Nextgengolf caters to golfers of all abilities but most, if not all, golfers surveyed have competed in some form of tournament golf setting whether high school, collegiate, or otherwise.

This initiative was spearheaded by Nextgengolf (*Kris Hart, CEO,* and *Matt Weinberger, COO*) and Global Golf Advisors (*Michael Gregory, Senior Manager,* and *Bennett DeLozier, Senior Associate*). Learn more about Millennial trends, attitudes, and tactics for engaging them by visiting the golf resource library on the Nextgengolf website.

II. EXECUTIVE SUMMARY OF FINDINGS

It is essential that conclusions from this exercise be considered within the appropriate context of golf skill, participation, and frequency of play. The survey sample focused exclusively on an audience of active, avid Millennial golfers with prior golf interest and experience in tournaments or competitive golf events, many having played at the collegiate level. As such, survey results are not reflective of all Millennial golfers or the ‘average Millennial golfer’.

Targeting active and avid golfers was an important objective for this study since this cohort represents the best audience for (1) obtaining informed, quality feedback regarding Millennial golf experiences and habits, and (2) evaluating future customers/prospective members who align with existing golfer demographics and exhibit high-likelihood for conversion.

Questions containing significant insight for clubs regarding Millennial recruitment are stratified by various demographic elements to generate deeper insight into the habits and viewpoints of avid Millennial golfers. Response data for key questions is broken out by factors such as age, handicap, facility type, and region to assess behavioral differences within varying Millennial segments and to afford balanced evaluation of Millennial mindsets among different club types.

Research revealed the following high-level trends about Millennial golfers. Key takeaways and other significant findings are summarized in an infographic available on the GGA website.

Trends
1. Flexibility and customization are key
2. Referrals are very important
3. Non-golf amenities matter
4. Primary target audience should be low-handicap Millennials
5. Opportunities exist to better capture Millennials at private clubs
6. There are barriers which private clubs must consider

III. SURVEY RESULTS AND STATISTICS

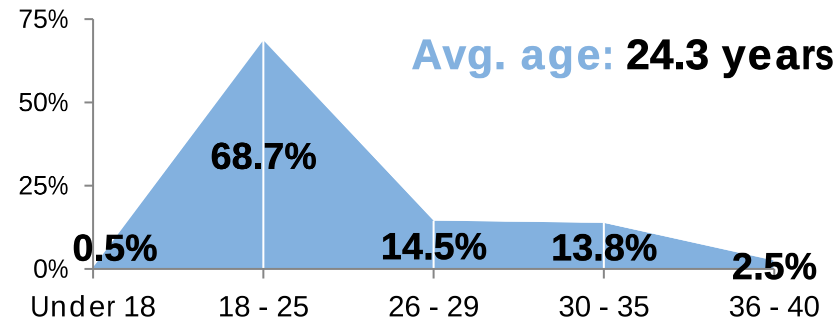
The ensuing sections summarize survey data on an individual, question-by-question basis with supplementary commentary and discussion from GGA. Questions containing significant insight for clubs regarding Millennial recruitment are stratified by various demographic elements to generate deeper insight into the habits and viewpoints of avid Millennial golfers.

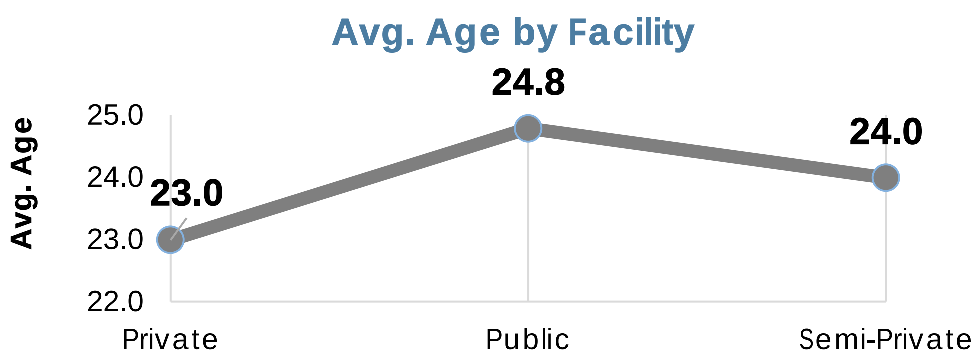
RESPONDENT PROFILE

Q2. Age

More than four in five (83%) participants are between the ages of 18 and 29, with the largest concentration (69%) ranging from 18 to 25 years of age.

Participants under the age of 25 comprised roughly seven out of ten (69%) respondents while those over the age of 26 account for nearly one-third (31%) of overall respondents. On average, participants are approximately 24 years of age, consistent with Nextgengolf's core demographic.





Stratification of respondent age by the type of facility at which they play most of their golf indicates that younger Millennials (averaging 23 or 24 years of age) are more likely to play at Private or Semi-Private facilities.

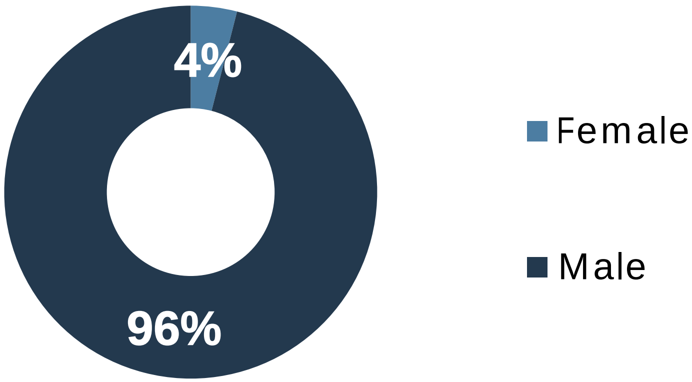
Respondents who play primarily at Public golf courses are almost 2 years older than those who play at Private clubs and nearly one full year older than those who frequent Semi-Private courses.

Q3. Gender

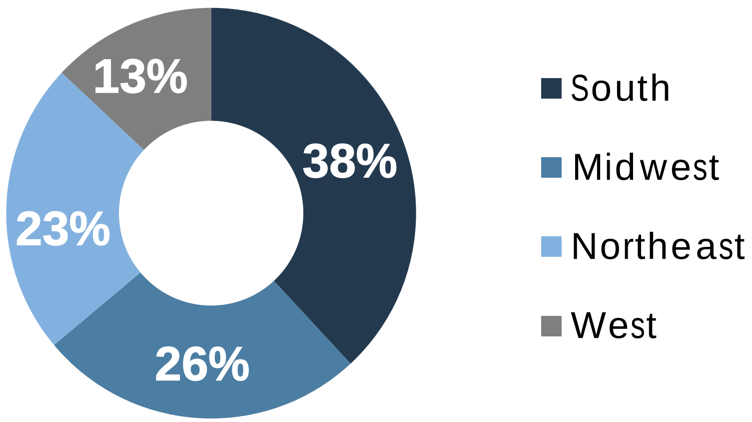
The vast majority of respondents identified as Male, with men representing significantly more than nine out of every ten (96%) respondents. Women comprised approximately 4% of respondents, which is consistent with Nextgengolf's golfer profile.

In 2017, the National Golf Foundation reported that women, regardless of age, account for approximately one-quarter (24%) of U.S. golfers while Millennial women (between the ages of 18 and 39) comprise approximately 39% of U.S. female golfers.

Considered in this context, Millennial women are a highly untapped demographic for golf participation.

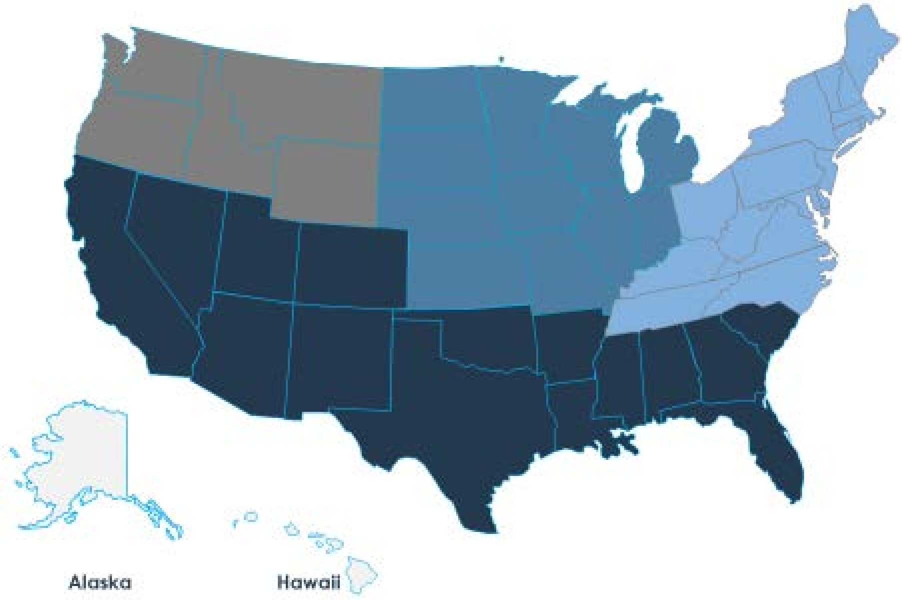


Q4. Region



Participants are evenly distributed across the United States, with the majority of avid Millennial golfers hailing from the South (38%). Approximately one-quarter (26%) reside in the Midwest while near another quarter (23%) live in the Northeast. Interestingly, Western states represented only 13% of participating Millennial golfers.

Q4. Region (continued)



Clustering is evident in large states such as California and Texas as well as within the Ohio River Valley region in states such as Ohio, Pennsylvania, New York, and Virginia. Overall, participants can be sourced back to highly populated states and cities across the U.S.

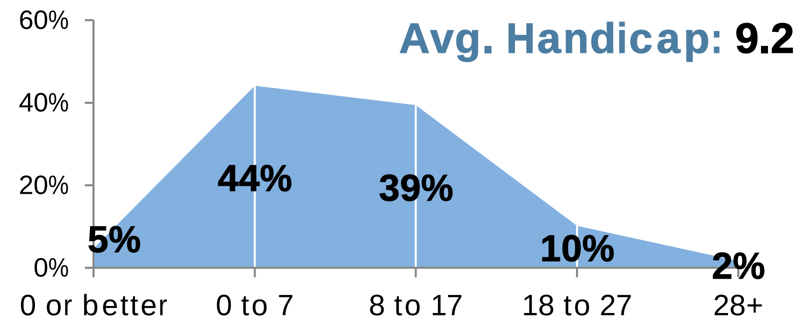
Massachusetts, while among the geographically smallest states, exhibits the largest concentration of respondents. This is due to the area's high population density and the market penetration of Nextgengolf in its home state.

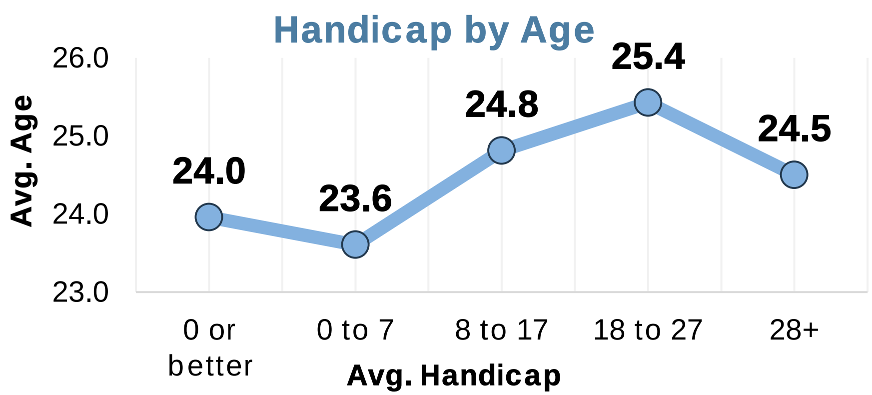
Alabama **(0.6%)**
Alaska **(0%)**
Arizona **(1.6%)**
Arkansas **(0.4%)**
California **(7.4%)**
Colorado **(2.1%)**
Connecticut **(1.8%)**
Delaware **(1.0%)**
District of Columbia **(0.8%)**
Florida **(2.1%)**
Georgia **(2.1%)**
Hawaii **(0%)**
Idaho **(0.3%)**
Illinois **(4.9%)**
Indiana **(2.3%)**
Iowa **(0.8%)**
Kansas **(1.0%)**
Kentucky **(0.9%)**
Louisiana **(0.4%)**
Maine **(0.3%)**
Maryland **(1.9%)**
Massachusetts **(10.7%)**
Michigan **(3.5%)**
Minnesota **(1.9%)**
Mississippi **(0.1%)**
Missouri **(2.0%)**
Montana **(0.1%)**
Nebraska **(0.2%)**
Nevada **(0%)**
New Hampshire **(0.5%)**
New Jersey **(4.1%)**
New Mexico **(0%)**
New York **(5.3%)**
North Carolina **(3.7%)**
North Dakota **(0.1%)**
Ohio **(6.4%)**
Oklahoma **(1.2%)**
Oregon **(0.9%)**
Pennsylvania **(5.8%)**
Rhode Island **(0.4%)**
South Carolina **(1.2%)**
South Dakota **(0%)**
Tennessee **(0.9%)**
Texas **(9.2%)**
Utah **(0.2%)**
Vermont **(0.2%)**
Virginia **(4.1%)**
Washington **(0.5%)**
West Virginia **(0.3%)**
Wisconsin **(2.7%)**
Wyoming **(0%)**

Q5. Golf Handicap

Approximately half (49%) of participating Millennial golfers have a golf handicap in the range of 0 to 7 while roughly four in ten (39%) fall within the 8 to 17 range. On average, participating Millennial golfers play to a handicap of 9.2.

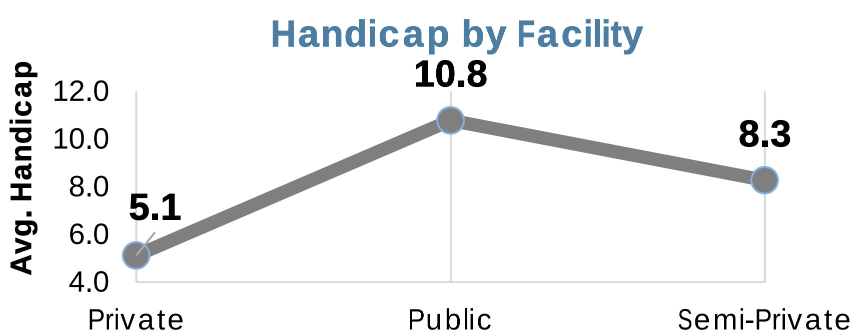
This skill level is significantly below overall average – which ranges from roughly 14 to 17 (men) and 26 to 30 (women) – and is attributed to the regularity of play and tournament experience characteristic of Nextgengolf's database of avid golfers.

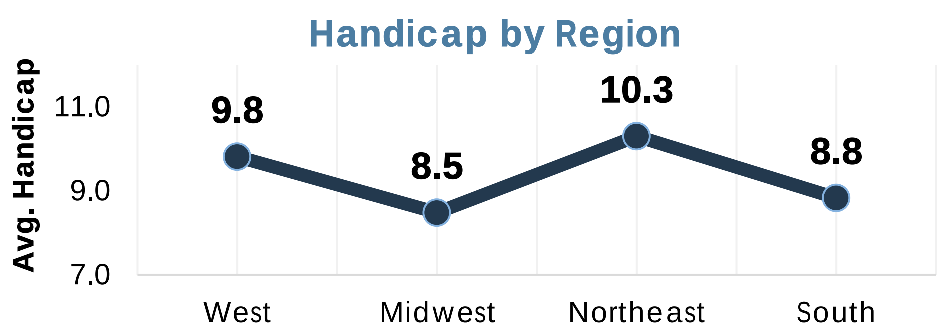




Survey data indicates that low-handicap golfers are more likely to be younger players, even among Millennials. Stratification of golf handicap by age shows that respondents with a handicap of 7 and under have an average age of 24 or younger. Golfers playing to a handicap ranging from 8 to 17 are almost 1 year older, while those in the 18 to 27 range are 1.5 to 2 years older.

Golfers from the South and Midwest maintain a lower handicap than players from West or Northeast. Low-handicap golfers are also 1.5 to 2 times more likely to play at Private courses.

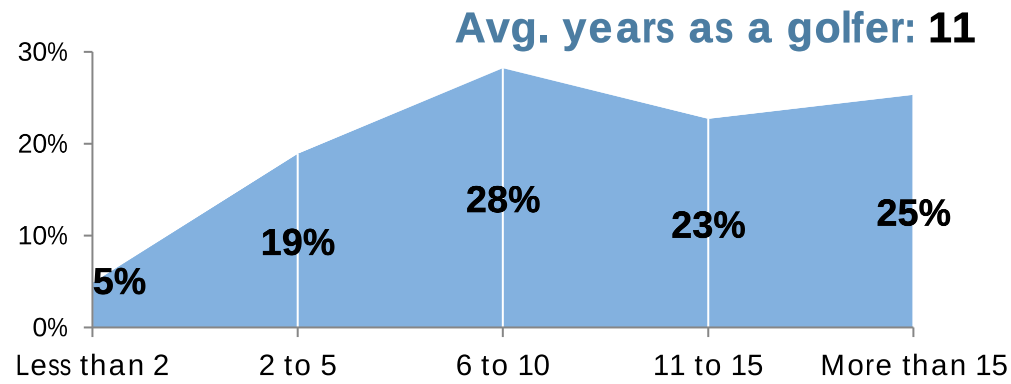




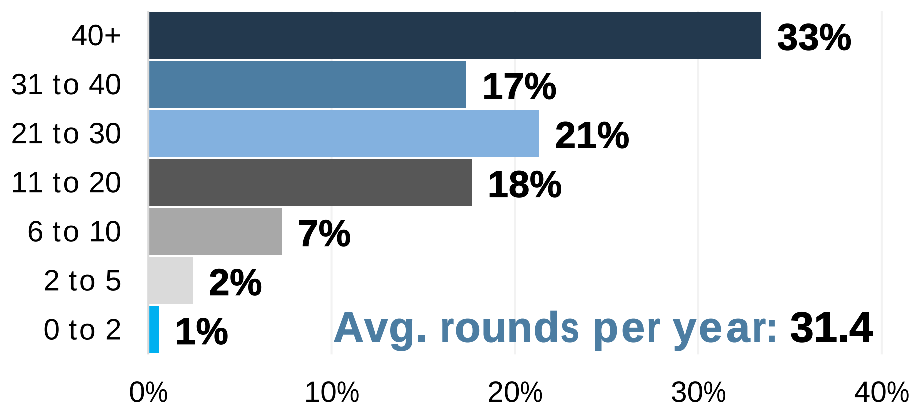
Q6. Years as a Golfer

The duration for which respondents have played golf is evenly distributed, with roughly half (49%) of participating Millennials indicating that they have been a golfer for more than 10 years. Approximately one-quarter (24%) of participants have adopted golf within the last 5 years.

On average, participating Millennial golfers have been a golfer for 11 years.



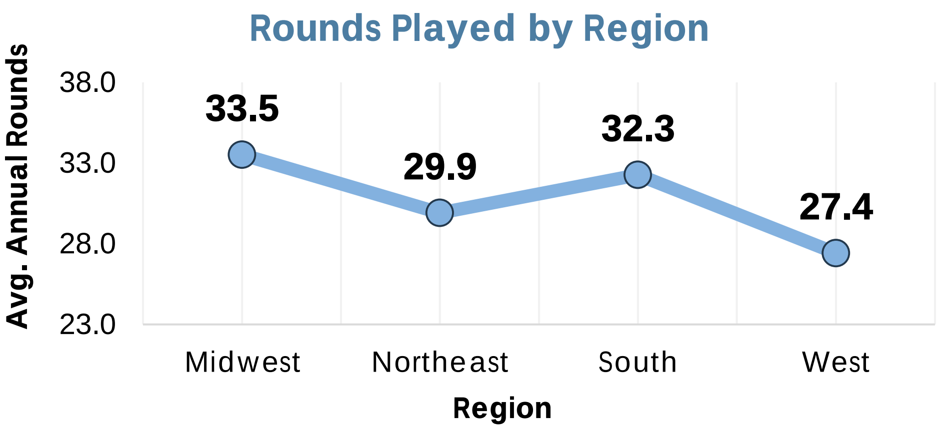
Q7. Rounds of Golf Played Annually



One-third (33%) of respondents play 40 or more rounds of golf each year while nearly four out of ten (38%) average between 21 and 40 rounds in a given year.

On average, participating Millennials play 31.4 rounds of golf annually. The National Golf Foundation's 2017 research indicates that male golfers in the U.S. average 20.8 rounds per year while the average for 'avid' golfers is higher at 34.0 rounds annually.

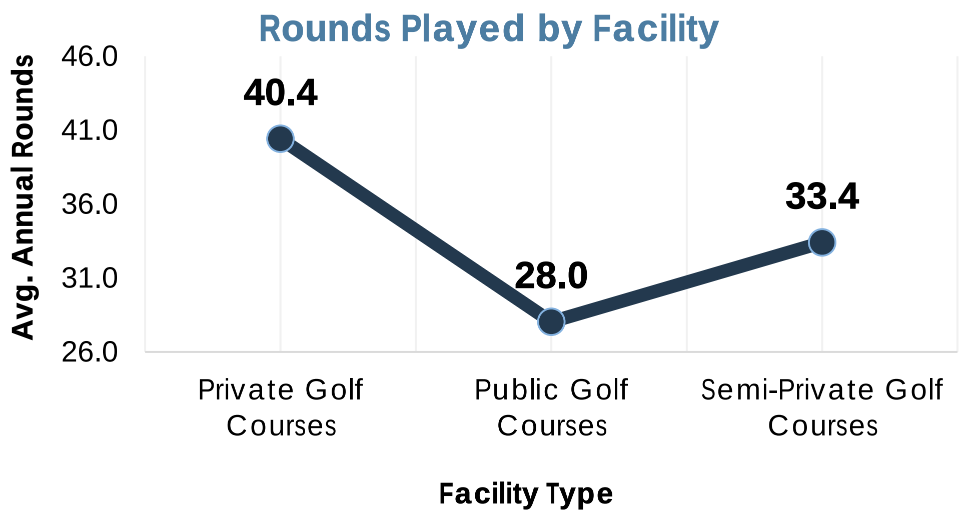
Q7. Rounds of Golf Played Annually (continued)



Stratification of annual rounds played by region shows that Millennial participation is consistently high across the United States, varying by a maximum of 6.1 rounds (based on annual averages).

Interestingly, Millennials who live in the West play the fewest rounds of all participants despite having a more favorable golf climate than their Midwestern and Northeastern counterparts.

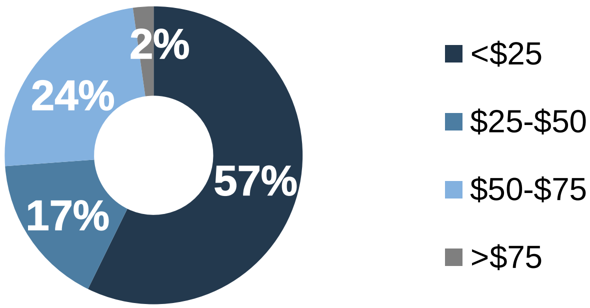
Stratification of annual rounds by facility type indicates that, on average, Private and Semi-Private Golf Courses capture more Millennial golf rounds than Public Golf Courses each year. Private Golf Courses generate nearly 1.5 times the average number of rounds than Public facilities while Semi-Private Golf Courses generate 1.2 times more.

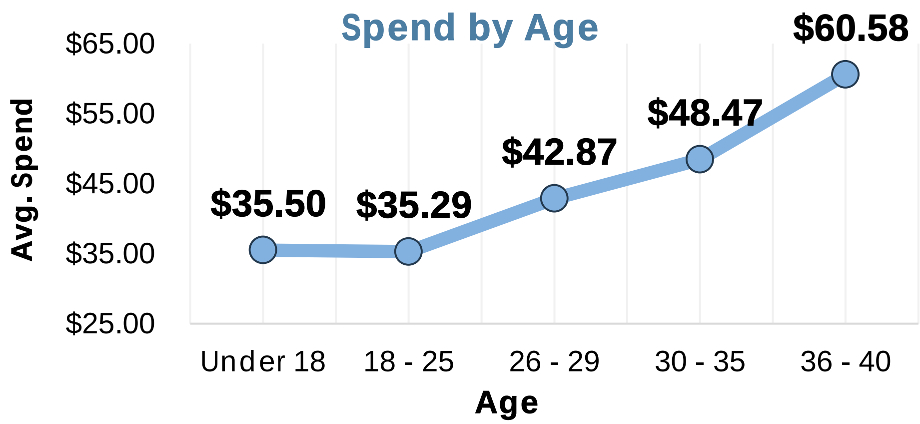


Q8. Spend Per Round of Golf

More than half (57%) of participating Millennials prefer to spend less than $25 on a normal round of golf. Roughly one-quarter (24%) are willing to spend between $50 and $75, while only 2% of participants are willing to pay more than $75 per round.

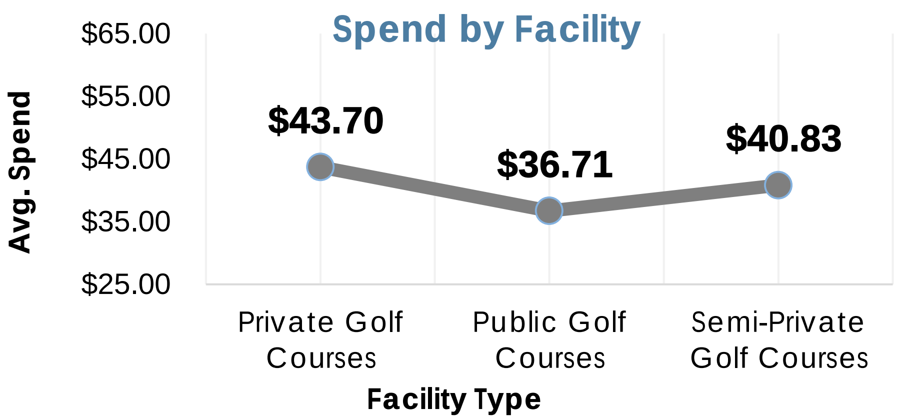
On average, participating Millennial golfers prefer to spend $38.85 on a normal round of golf.

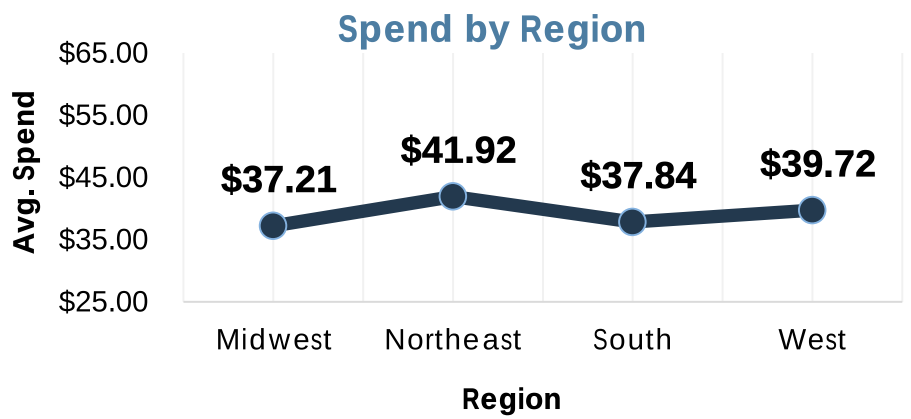




Stratification of spending preferences by age, facility type, and region reveals that respondents are willing to spend more on a round of golf as they age. Relative to Millennials under the age of 25, older Millennial golfers would spend 1.7 times more per round while those ages 26 to 35 would spend 1.3 times more.

Spending preferences are generally consistent by region and facility as shown below.

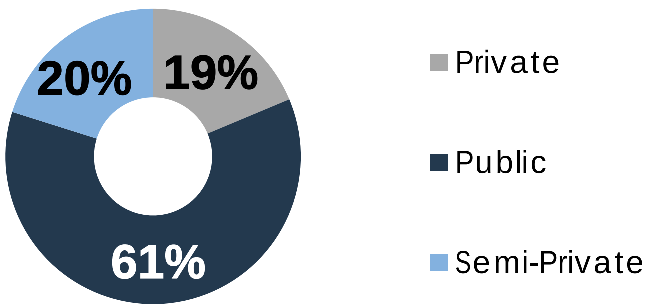




MILLENNIAL HABITS, PREFERENCES, AND FUTURE PLANS

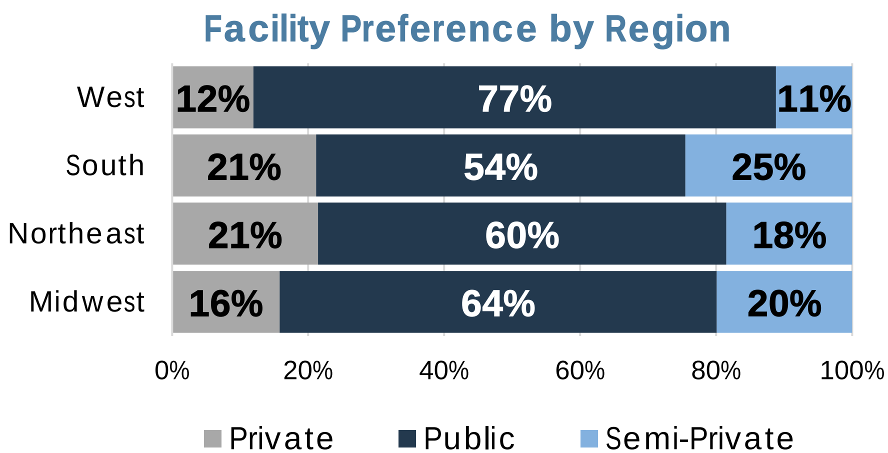
Q9. Golf Facility Preference

Respondents were asked to identify where they play golf most often. More than six out of ten (61%) Millennials play golf at Public Golf Courses while the remaining 39% are evenly split between Private (19%) and Semi-Private (20%) golf courses.



Q9a. Golf Facility Preference (by Region)

Relative to overall responses, stratification of facility preferences by region reveals the following observations about Millennial golfers in different geographic locations:



West: golfers play less at Private (-7%) and Semi-Private (-8%) courses and significantly more at Public courses (+16%).

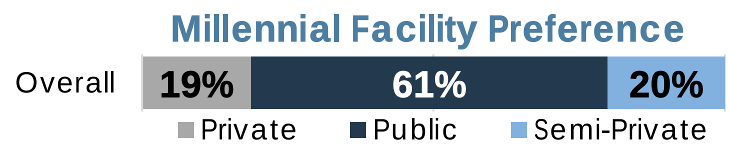
South: golfers play slightly more at Semi-Private courses (+5%) and less at Public courses (-7%).

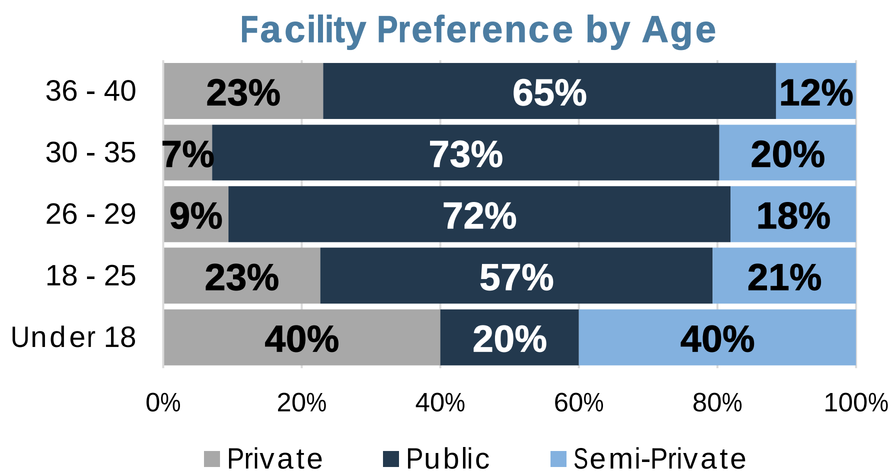
Northeast: golfer preferences are consistent with overall Millennial preferences.

Midwest: golfers play slightly less at Private courses (-3%) and slightly more at Public courses (+3%).

Q9b. Golf Facility Preference (by Age)

Relative to overall responses, stratification of facility preferences by age reveals the following observations about Millennial golfers of different ages:





Private Golf Courses: there is a sense of polarity among golfers who play at Private courses most often, with these individuals being either the youngest or oldest Millennials.

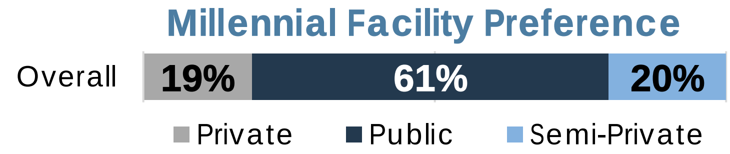
Public Golf Courses: golfers who play at Public courses most often are in their late-twenties or early-thirties. It may be the case that these Millennials are pinched for disposable income or lack the availability of time for leisure/recreation.

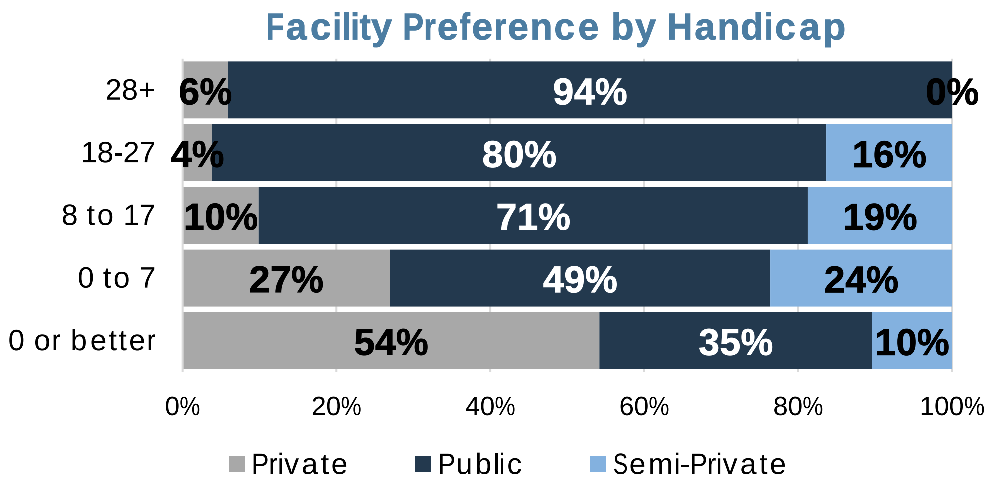
Interestingly, approximately four in ten (40%) golfers under the age of 18 reportedly play most of their golf at Private facilities; the largest concentration among all age ranges and nearly double overall Millennial Private course utilization. While it is important to emphasize that Under 18 golfers in the sample represented less than 1% of respondents, consideration of data in other age ranges suggests something more. Even participating Millennials ages 18-25 (69% of respondents) play more at Private courses. Meanwhile, Millennials between the ages of 26-29 and 30-35 play less at Private and Semi-Private courses while playing significantly more at Public courses.

Survey data points toward age 25 as a pivot point, the age at which participating Millennials diverge from Private facilities and begin to source an increasing number of golf rounds from Public facilities. There are at least two possible explanations for this trend. From a career standpoint, age 25 is likely an age when individuals are either changing jobs, potentially relocating for work, or see increasing professional responsibilities and a subsequent decrease in time available for golf. From a socioeconomic standpoint, it is possible that they ‘age out’ of membership privileges afforded at Private and Semi-Private facilities and are unable to finance continued membership. This suggestion is reinforced by the fact that the percentage of Millennials who play most of their golf at a Private club increases from approximately 8% (in those aged 26-35) to 23% (in those aged 36-40), an increase of nearly 3x.

Q9c. Golf Facility Preference (by Handicap)

Relative to overall responses, stratification of facility preferences by handicap reveals the following observations about Millennial golfers of different skill level and ability:





High Handicappers: players with limited golf experience or ability play almost entirely at Public courses.

Mid-range Handicappers: average players, or golfers who are improving their game, seem to 'transition' into playing at Private courses by playing more frequently at Semi-private courses.

Low Handicappers: there is an inverse relationship between a low handicap and the frequency of play at Private courses, better players play significantly more golf at Private clubs and significantly less at Public and Semi-Private courses.

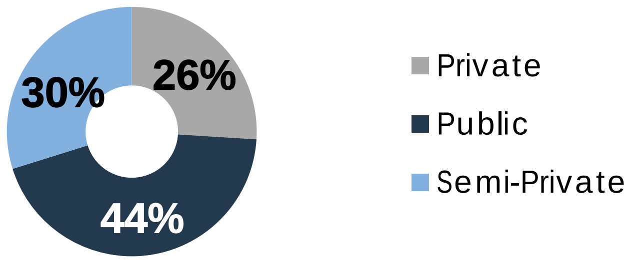
Approximately two-thirds (~65%) of participating Millennials with a 0 handicap or better play most of their golf at a Private or Semi-Private facility compared to only 6% of Millennial respondents with a 28+ handicap.

- Low-handicap, Millennial golfers are excellent candidates for private club membership, not only are they more inclined to play at Private facilities, but this inclination increases proportionately to increases in their skill level. In addition, there is the opportunity for Private courses to encourage Millennial participation by facilitating more low-handicap play through tournaments/competitive events flighted by handicap rather than age.
- High-handicap, Millennial golfers represent the best opportunity for Public courses to increase their annual rounds and grow the game. This demographic is inclined toward Public course play and are likely to be highly receptive to introductory programs for golf education, training, and skill development.

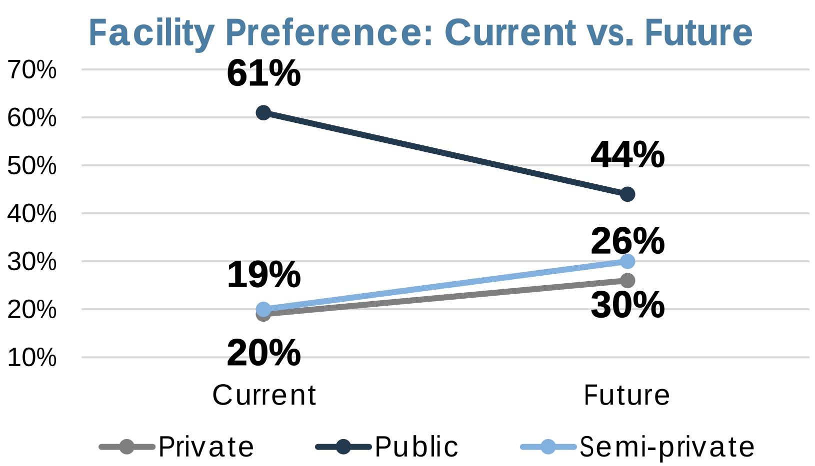
Q10. Future Golf Facility Preference (post-college)

It's no surprise that many respondents are currently college or university students pursuing an associate's, bachelor's, or related degree. Nextgengolf began as platform exclusively intended to make golf more affordable for college students. The platform evolved into a company as students-turned-graduates continued to seek out the support, benefits, and opportunities afforded to them in school. Several years later the company had grown into an organization spanning from college-aged students to young professional golfers aging into their thirties.

Respondents who are currently students were asked to identify where they plan to play golf after college. More than four out of ten (44%) plan to play at Public Golf Courses, three in ten (30%) at Semi-Private facilities, and roughly one-quarter (26%) at Private clubs.



Comparison of where participating Millennials currently play most of their golf to where they plan to play golf in the future indicates a slight trend away from Public courses (-17%) toward Semi-Private (+7%) and Private (+10%) facilities.



There is, however, a sense of stability among Millennials, at least two-thirds of whom will continue to play at the same type of facility in the future. Of Millennial respondents currently playing golf at:

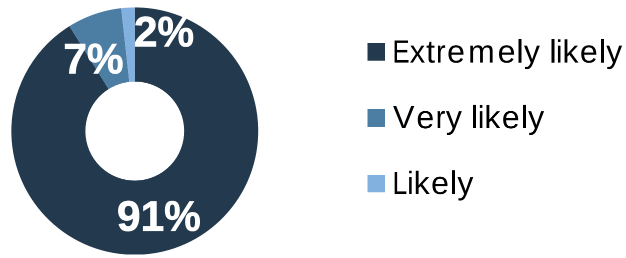
- **Private facilites:** 72% will play there in the future.
- **Semi-Private facilities:** 71% will play there in the future.
- **Public courses:** 66% will play there in the future.

The most significant shift is that approximately one in every three (35%) participating Millennials who currently play most of their golf at a Public Golf Course will look to make a change after graduating college: 21% plan to play at Semi-Private facilities while 14% plan to join a Private Golf Course.

The ability for Private/Semi-Private courses to capture the 35% of participating Millennials seeking a shift away from public facilities after college will be contingent upon addressing the perceived barriers to joining a private club on the next page.

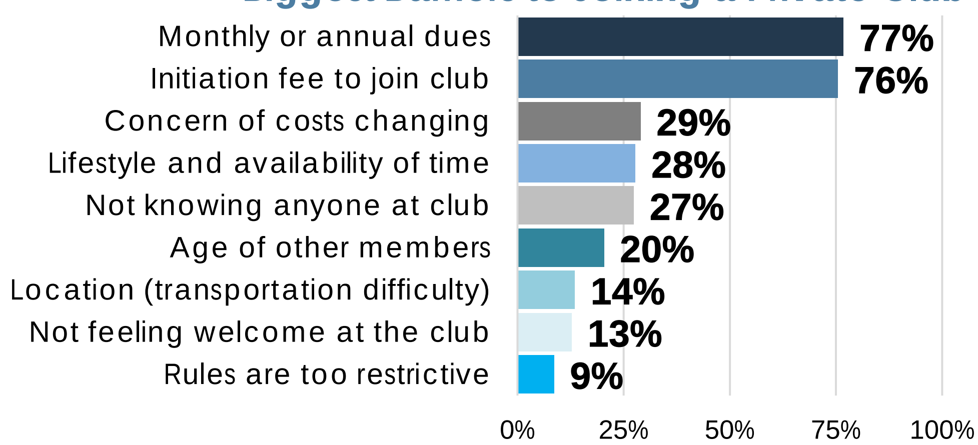
Q11. Likelihood of Continuing to Play Golf in the Future

All participating Millennials indicated that they are likely to continue to play golf in the future, with approximately nine out of ten (91%) Millennials indicating that it is Extremely Likely. It is noteworthy that this level of confidence does not vary by facility type.



Q12. Biggest Barriers in Joining a Private Club

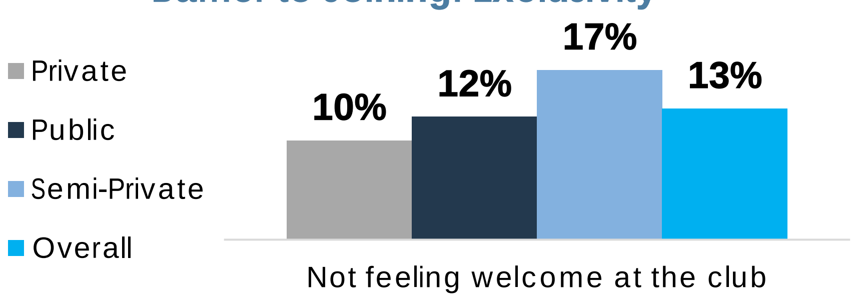
Biggest Barriers to Joining a Private Club



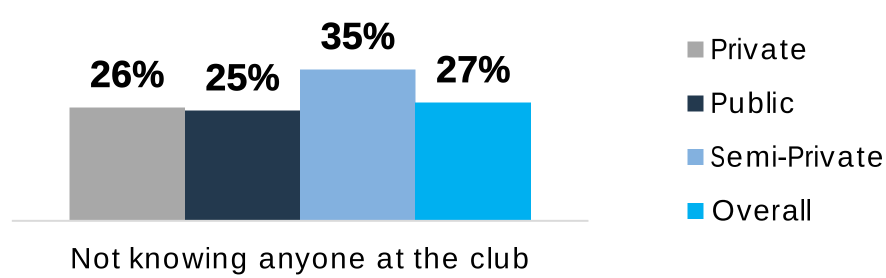
For Millennials, the biggest barriers to joining a private club are predominantly cost-related. More than three-quarters of respondents indicated that dues (77%) and fees (76%) are the significant barriers. Approximately three out of ten (29%) are limited due to a concern that the costs to belong will change from year to year.

Barriers related to perceptions of exclusivity are not significant obstacles for Millennials. In fact, they're more likely to feel barriers of exclusivity (i.e. not feeling welcome or not knowing anyone) at Semi-Private facilities over Private clubs.

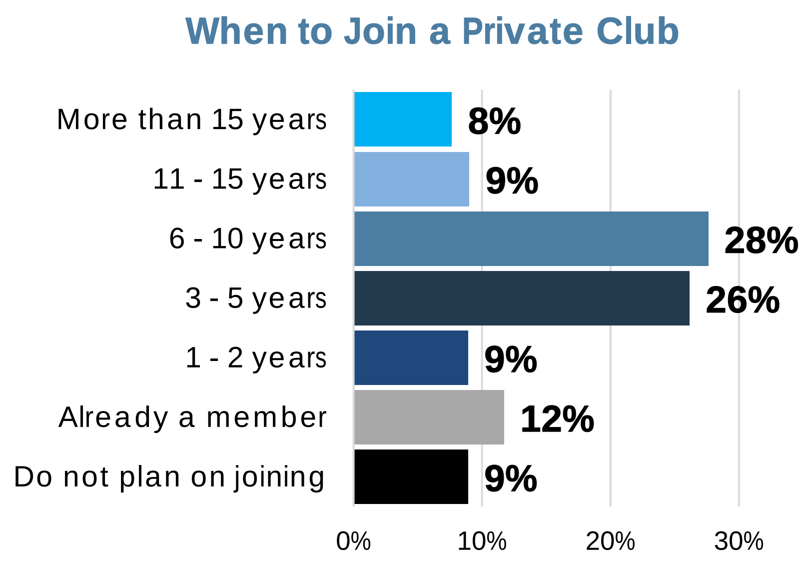
Barrier to Joining: Exclusivity



Barrier to Joining: Exclusivity



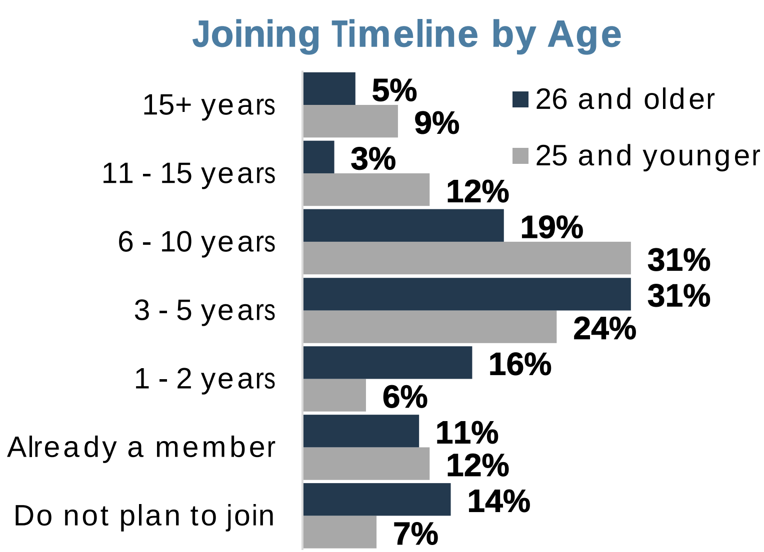
Q13. When Millennials Might Join a Private Club

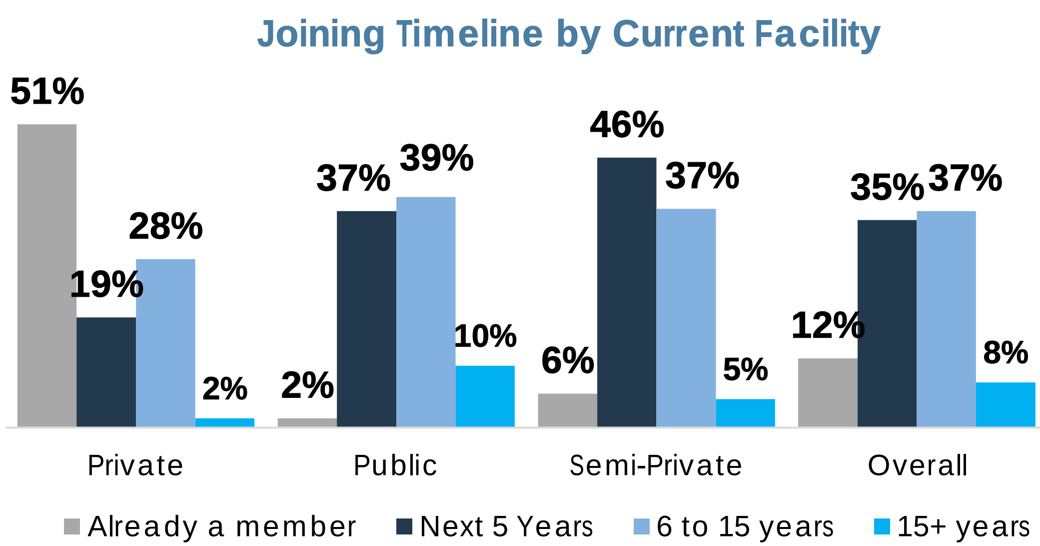


With 9% of participating Millennials not planning to join a Private club and 12% having already joined, approximately four out of five (79%) Millennial respondents plan to join a Private club within the next 15 years.

Stratification of Millennials' joining timeline by age and where they currently play golf yields the following observations:

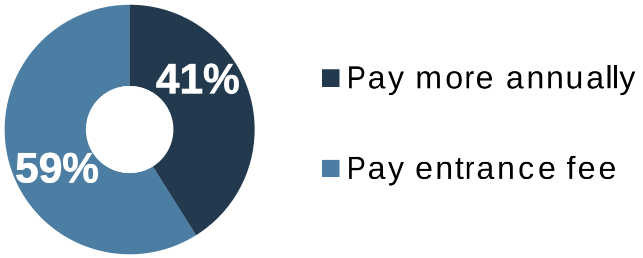
- 55% of Millennials age 25 and younger will consider joining a Private club within 3 to 10 years.
- 47% of Millennials age 26 and older will consider joining a Private club within 5 years.
- The likelihood of joining a Private club decreases with age.
- Those who currently play at Semi-Private facilities are 11% more-likely than overall Millennial participants to join a Private club within the next 5 years.



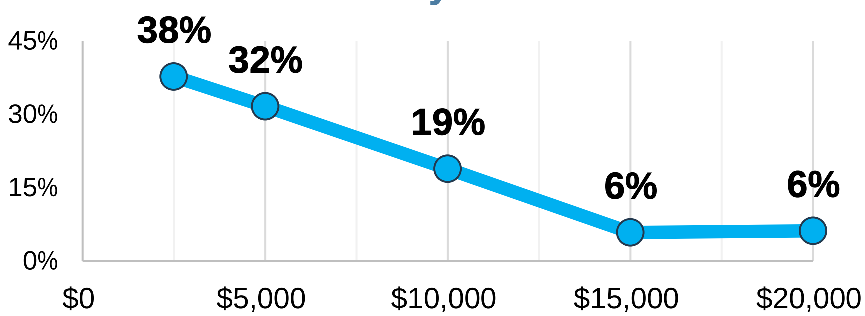


Q14. Tolerance to Pay for a Private Club Entrance Fee

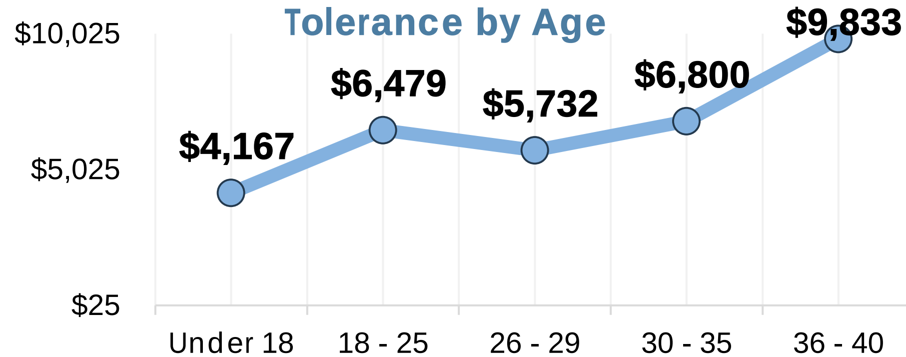
Approximately four out of ten (41%) Millennial golfers would prefer to pay more annually rather than entrance fee to join a Private Club. Of those willing to pay an entrance fee (59%), the average tolerance is approximately $6,500.



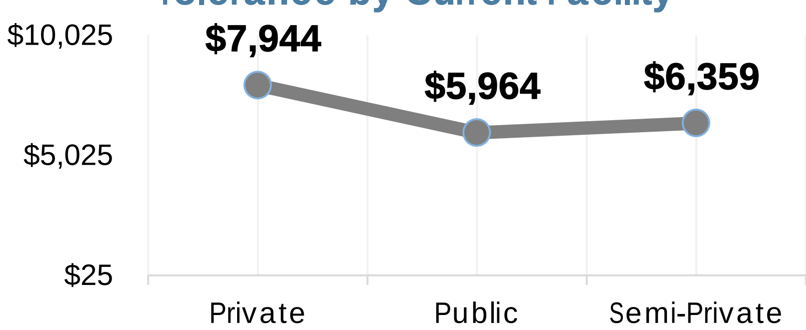
Tolerance to Pay an Entrance Fee



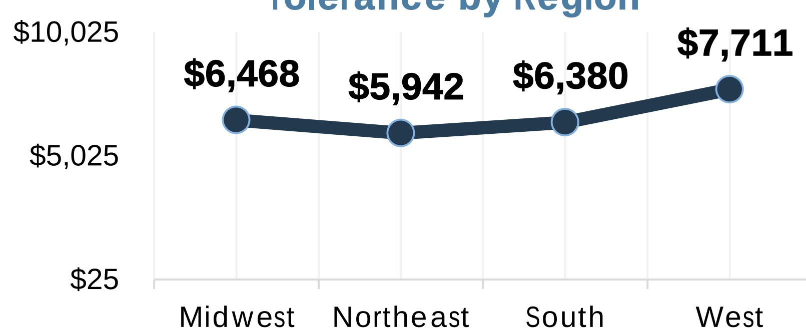
Tolerance by Age



Tolerance by Current Facility



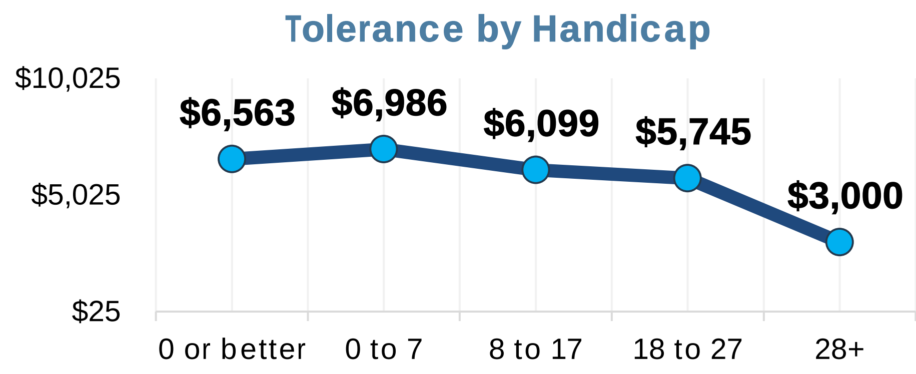
Tolerance by Region



Entrance fee tolerance increases with age, more than doubling between Millennials under age 18 and those over the age of 36. Tolerance decreases alongside the privacy levels of the facility at which Millennials currently play, with Private club golfers exhibiting higher tolerance levels. Tolerance is lowest in the Northeast, consistent through the Midwest and South, and significantly higher (+$1,211) in the West.

Q14. Tolerance to Pay for a Private Club Entrance Fee (continued)

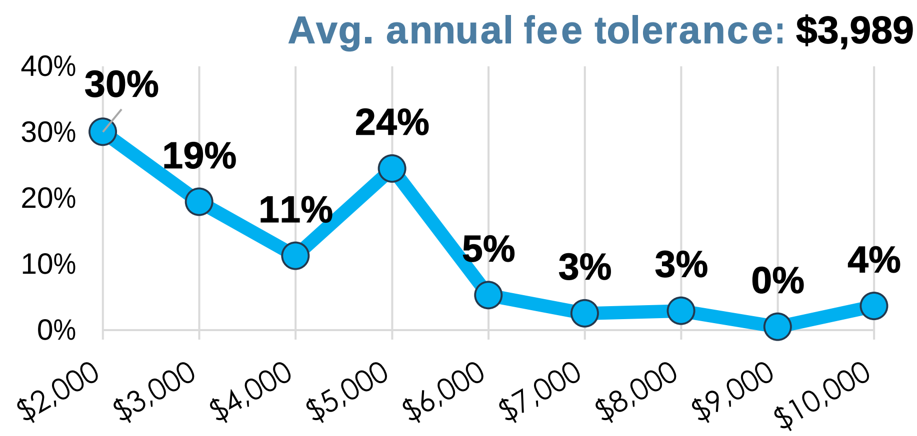
Entrance fee tolerance levels decrease as skill level decreases/handicap increases. Golfers with a 28+ handicap are less than half (46%) as tolerant to pay an entrance fee as those with a 0 or better handicap.



Q15. Tolerance to Pay for Private Club Annual Fees

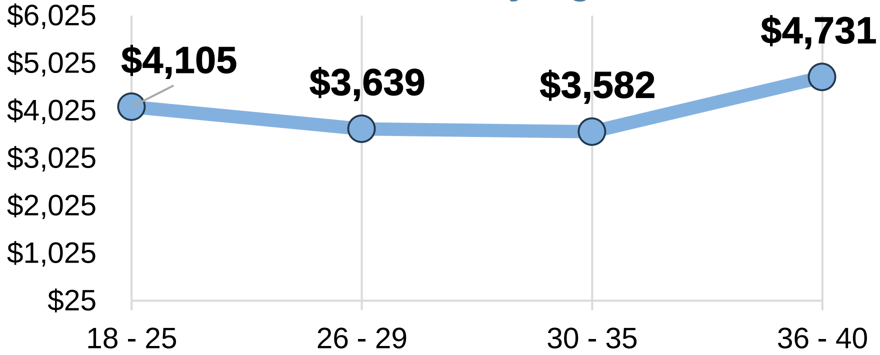
Approximately six out of ten (60%) Millennial golfers would prefer to pay annual fees in the range of $2,000 and $4,000 to belong to a Private club. Three in ten (30%) would prefer to pay an estimated $2,000 each year while roughly one-quarter (24%) would be willing to pay $5,000. Only 15% of participating Millennials are tolerant of paying more than $5,000 per year in annual club dues.

On average, Millennial golfers would be willing to pay approximately $3,989 in annual fees to belong to a Private club.

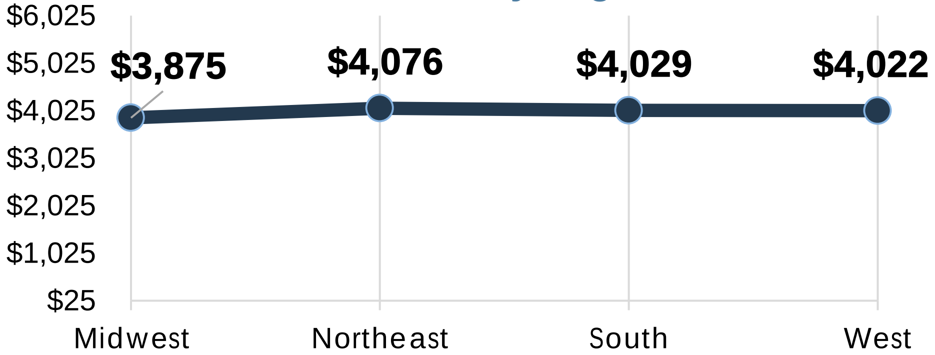


Q15. Tolerance to Pay for Private Club Annual Fees (continued)

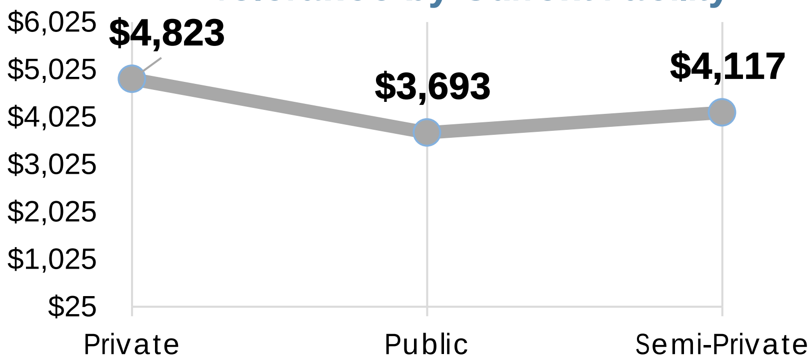
Tolerance by Age



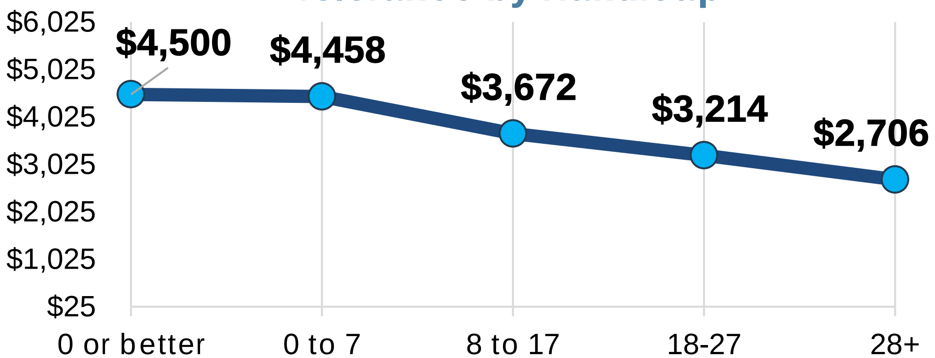
Tolerance by Region



Tolerance by Current Facility



Tolerance by Handicap



Annual fee tolerance is highest ($4,731) among the oldest Millennial respondents, but falls below the overall average for Millennial participants between the ages of 26 and 35. Tolerance is consistently above average in the Northeast, South, and West, dipping slightly below average for those living in the Midwest, who have the lowest tolerance level to pay annual Private club fees. Tolerance decreases alongside the privacy levels of the facility at which Millennials currently play, with Private club golfers exhibiting tolerance levels significantly above the average (+$834).

Annual fee tolerance levels decrease as skill level decreases. Golfers with a 0 or better handicap are 1.7 times as tolerant to pay annual club fees as those with a 28+ handicap whose tolerance falls significantly below the average (-$1,283).

Q16. Factors Influencing Decision to Join a Private Club

Socialization is highly important to Millennials, survey data indicates that leveraging existing relationships can influence Millennials to join a Private club. More than four out of five (83%) participating Millennial golfers indicated that recommendations from their friends, family, or colleagues is a top factor which may influence their decision to join.

Nearly two-thirds (63%) of respondents indicated that they might join as a result of a positive experience attending an activity or function at the club (such as a golf tournament or wedding). Opportunities exist for private clubs to host outside events focused on introducing Millennial golfers to their club, course, and facilities in order for them to gain an understanding of the club community and feeling for the golf course experience offered by the club. It will be important to consider the impact that hosting such events on weekends, as opposed to weekdays, will have on event attendance and participation; Millennial attendance may be inhibited by work obligations or school commitments.

Factor	Support
Recommendations from friends, family, or colleagues	***83%***
A positive experience attending a tournament or wedding at the club	***64%***
A reception of cocktail party hosted by the club to promote membership	***25%***

Q17. Appealing Membership Offerings

Millennial golfers are more attracted to customized payment options and straightforward discounts rather than phased payment structures or long-range plans for cost distribution. Membership offerings related to phased or deferred payment plans did not receive more than 26% support from Millennials.

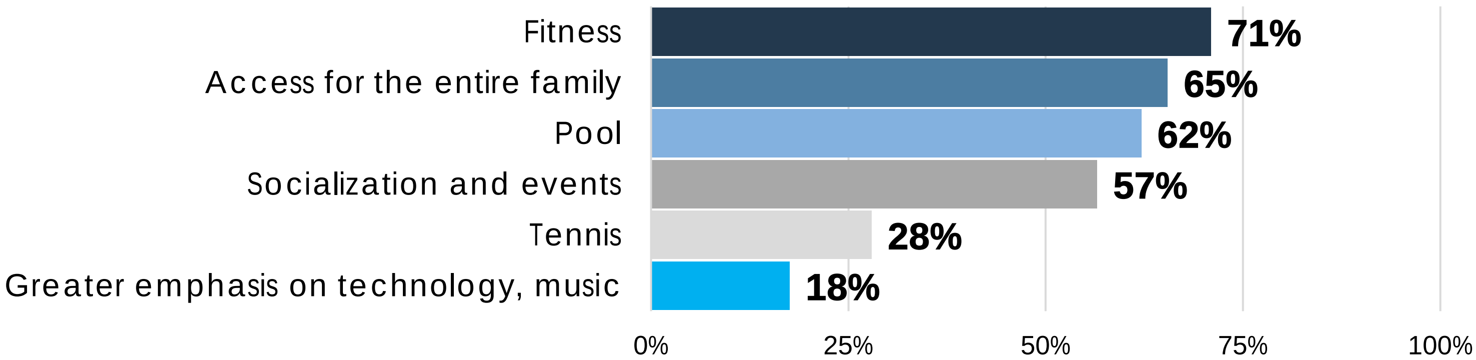
Approximately half (51%) of Millennials indicate that the most appealing membership offering is a flexible membership through which they can pay a low social fee and receive full access to the club and play golf on a pay-per-use basis. Discounted entrance fees and trial membership programs received comparable support.

Membership Offerings	Support
A flex membership where you pay a low social fee that provides full access to the club with golf access on a pay-per-use basis	51%
A discounted entrance fee payable right away	48%
Trial memberships	47%
An entrance fee amortized over 2-3 years	26%
An entrance fee amortized over 4-5 years	20%
An entrance fee amortized over more than 5 years	17%
A higher entrance fee payable upon reaching full membership (typically age 40)	17%

Q18. Non-Golf Amenities and Social Components

Survey feedback from Millennial golfers indicates that golf alone is not enough to influence their decision to join a Private club. Roughly seven in ten (71%) Millennial respondents indicated that Fitness amenities are important to them in their considerations of purchasing a Private club membership. Approximately two-thirds (65%) regard access for their entire family as important while a similar number of participating Millennials (62%) consider a pool amenity to be important.

Important Non-Golf Amenities and Social Components



Q19. Factors Impacting Where Millennials Play Golf

Millennials base their decision on where to play golf primarily on the basis of course condition (1.94) and overall price (2.31). Their decisions are affected by secondary factors such as location (3.06) and friends who play at the specific course (3.25), though at a much lower priority. Interestingly, large-scale golf events such as tournaments or group outings received the lowest importance ranking of all, indicating that these types of events are less-significant factors in the decision for a Millennial golfer to play at a particular course.

Decisive Factors	Importance Rank
Course Condition	1.94
Price	2.31
Location	3.06
Friends Play at that Course	3.25
Tournaments Hosted at that Course	4.32

Nextgengolf has observed greater participation and price elasticity for tournaments and events hosted at golf courses with excellent course conditioning. Their core audience of avid Millennial golfers are more inclined to attend and less inclined to be limited by cost concerns when they are playing a well-conditioned course. Survey data from participating Millennials supports the observation that course conditioning (1.94) can be more influential than price (2.31) when it comes to tournaments.

IV. TRENDS SUMMARY

Analysis of survey data reveals the following trends as having the greatest impact for golf clubs and course operators:

Flexibility and Customization are Key	Referrals and Recommendations Work	Golf Alone is Not Enough
• Cost is a major concern for Millennials. They would prefer to pay more annually rather than invest a large sum on joining fees or upfront costs. • They prefer flexibile membership options, pay-for-use categories, and trial programs that would allow for them to make changes free from substantial financial loss.	• Endorsements from friends, family, and colleagues are important to Millennials and highly compelling motivators to join a private/semi-private club or play at a public course.	• Millennials are seeking an experience that is, or can be, more than golf. • As such, non-golf amenities matter, particularly those relating to fitness, family access, and swimming.

Target Low-Handicap Millennials	Capture Millennials Earlier	Barriers to Consider
• Millennial golfers with a higher skill level are willing to pay more across the board and are more inclined towards private or semi-private facilities. • Public golf courses have the opportunity to capture less-skilled or beginning golfers through instruction and practice programs.	• All facilities have the opportunity to capture Millennials earlier and must consider ways to recruit them early and retain them. • For private and semi-private clubs, joining aspirations are higher at a younger age while joining income is higher at an older age. • Public facilities generate higher utilisation among mid-range Millennials ages 26 to 35 due to lower costs and ease of access.	• The biggest barriers to joining a club or playing regularly at a golf course relate primarily to cost. • Millennials are concerned with costs changing from year-to-year or round-to-round and are inclined to avoid large lump-sum payments or long-term commitments. • Other barriers relate to lifestyle and the availability of time for golf. Considerations such as not knowing anyone, not feeling welcome, or being 'too young' are comparatively less important.

V. FORECASTING THE FUTURE

Unlike previous generations of club members and regular golfers, Millennials have different priorities and are predictable in different ways:

- **AGILITY //** Millennials are mobile and will change levels of engagement more than previous generations.
- **LOYALTY/INFIDELITY //** Given their agility, Millennial golfers require more robust and meaningful engagement to sustain their business.
- **RELATIONSHIP+ //** Millennials want to "connect" with the club/course to develop a sense of 'ownership' of that facility and cultivate a relationship that is more relational than transactional.
- **INCLUSIVENESS //** Millennials want inclusivity and often do not consider themselves to be 'traditional people'. They are willing to try new experiences and co-create with golf businesses.
- **AFFORDABILITY //** Cost concerns are worries for Millennials and the biggest barriers between them and golf.
- **RELEVANCE //** Current membership, payment, amenity, and service options/offerings are not as appealing to Millennials as to previous generations.

It is important for all golf facilities, owners, and operators to understand that the Millennial generation contains their future customers and members. They are integral to the future financial sustainability of golf operations and will want to 'belong' if the facility matches their values and logistical needs (i.e. time, costs, activities, etc.). All clubs must continue to explore methods of establishing relevance to Millennial lifestyles.