THE TRUTH ABOUT MILLENNIAL GOLFERS
Presenters

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INTRODUCTION

OUR RELATIONSHIP
Nextgen/GGA. Industry expertise. Giving the gift of golf.

MILLENNIAL INITIATIVE
Presentation Map

04 TRENDS SUMMARY
Attention-worthy trends.

05 KEY FINDINGS

06 ONWARD
NEXTGEN & GGA INTRODUCTION
About Nextgengolf

“We care. We listen. We are here to help you as a young adult golfer. Live Life. Play Golf.”

// Nextgengolf

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.
Origins

2003
Southeastern Club Golf Association (SCGA)

2006
National Collegiate Club Golf Association (NCCGA)

2011
College Golf Pass (CGP)

2012
NCCGA incorporate into CGP

2014
CGP rebranded as Nextgengolf

2015
Nextgengolf establishes City Tour

2017
Nextgengolf launches National High School Golf Association (NHSGA)
Nextgengolf does not focus on the best golfers. Rather we focus on "the rest" and care about the future sustainability of golf.

- **185** golf events in 2017
- **29** regions host NCCGA events
- **20** US Cities with City Leaders
- **2016** Kris Hart, CEO named a “futurist” by GolfDigest
- **18-39** year-old golf represented by Nextgengolf as governing body
Nextgengolf is dedicated to the success of golfers in their 20's and 30's. At its core: team-based golf events exclusively for college students and young adults.

Nextgengolf is in the golf experience business.
About GGA

Serving 2,900+ clients worldwide

Leading golf industry insight from 4 global offices

PHOENIX, ARIZONA

TORONTO, CANADA

DUBLIN, IRELAND

SYDNEY, AUSTRALIA
NEXTGEN & GGA RELATIONSHIP
A Joint Venture

The fusion of GGA's 26-year history of golf industry research and Nextgengolf's profound relationship with young golfers afforded the unique opportunity to study to a highly valuable Millennial audience.
Research Team

Comprised of Millennials who serve golf industry owners, operators, clients, and customers.

Millennials researching Millennials

Golfers researching Golfers
Nextgengolf connects Millennials to golf and supports the success of their game.

GGA strategizes solutions and solves problems for golf-related businesses.

Both share a passion to grow the game and give the gift of golf.
MILLENNIAL RESEARCH INITIATIVE
Inspiration

“Will Millennials join private clubs?”

“How much are Millennials willing to pay?”

“Do Millennials care about amenities?”

“How do we appeal to Millennials?”

“Where do Millennials want to go?”
Inspiration

• Commonplace questions for anyone charged with duty to fill membership pipeline with ‘new blood’.

• Millennial generation contains future customers and members. They are integral to the future financial sustainability of golf operations.

• Coming from a research background, best way to find out information is to ask Millennials directly.
**Nextgengolf Surveys**
Short annual surveys to several thousand avid golfers to inform Nextgen tournament scheduling and programming.

**Industry Need for Data**
Industry-wide need for reliable data. Business success tied to reliable data and strategic intelligence resources.

**Millennial Research Study**
Nextgen and GGA collaborated to gauge ‘degrees of separation’ between Millennials and clubs.

**Collaboration**
Nextgen provided network, facilitated collection of feedback. GGA analyzed response data and attempted to fit it into golf’s existing body of knowledge.
Two years of research on Millennial golfers.

2017
First research instrument deployed.
Over 1,000 Millennial golfers.

2018
Secondary investigation to dig deeper.
Over 1,200 Millennial golfers.
Aims

Support Managers
Support club managers, a more informed industry.

Track Changes
Track trends over time and monitor changes.

Forecast Trends
Trends impacting golf businesses in years ahead.

Identify Success
Identify successful strategies and tactics.

Inform Strategy
Inform strategic and business planning.

Future, Now
Engage the next generation of golfers.
Value

**RELIABLE DATA**

Source trustworthy information and data that is not promotional or sales-focused.

Real facts that can be put to work by golf businesses in subject market segments.

**APPERCEPTION**

Make sense of an idea by assimilating it into existing body of knowledge.

Perceive new experiences (Millennial golfer data) in relation to past experiences (golf industry knowledge).

**RELEVANCE**

Current club membership offerings do not appeal to Millennials in the same way as prior generations.

They will want to “belong” if the club matches their values. Help clubs work to established relevance.
Context

Survey sample focused exclusively on:

audience of active, avid, Millennial golfers with prior golf interest and experience in tournaments or golf events.
Context

Findings must be considered within appropriate context of golf skill, participation, and frequency of play.

Conclusions should not be construed as 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:

**QUALITY FEEDBACK**

Obtaining informed, quality feedback regarding Millennial golf experiences and habits.

**LOOKING AHEAD**

Evaluating future customers and 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.

For these questions response data is broken out by factors such as age, handicap, facility, and region to assess behavioral differences within varying Millennial segments and to afford balanced evaluation of Millennial mindsets among different club types.
TRENDS SUMMARY
Trends

Year 1: Trends Summary

- Flexibility & Customization are Key
- Target: Low-Handicap Millennials
- Referrals are Very Important
- Opportunities Exist to Increase Relevance
- Non-Golf Amenities Matter
- Barriers Must Be Considered by Clubs
Key survey findings touch on five key topics:

- Respondent Profile
- Golf Habits
- Outlook on Private Clubs
- Mobility & Travel
- Questions & Answers
RESPONDENT PROFILE
Year 1 and Year 2 Results *Consistent*

2017
- 1,033 responses

2018
- 1,242 responses

Largest survey of Millennial golfers to-date.
Well over half (57%) of respondents are between the ages of 18 and 25.

Slightly more than one-third (35%) are between the ages of 26 and 35.
Gender

More than nine in ten (94%) participants identified as male.

Women represented less than one-tenth (6%) of participating Millennials.
Top 10 States by Concentration:

1. Texas (9%)
2. California (8%)
3. Massachusetts (7%)
4. Ohio (7%)
5. Illinois (7%)
6. Pennsylvania (5%)
7. Florida (5%)
8. North Carolina (5%)
9. New York (5%)
10. Virginia (4%)

= 61% of respondents
States Split into Regions:
(US Census Bureau)

- West: 33%
- Midwest: 28%
- Northeast: 15%
- South: 24%

Consolidation: 4 regions
Golf Handicap

Average Handicap: 9.8

Nearly half (46%) of respondents play to a handicap of 7 or under.

Skill level significantly below industry average which ranges from roughly 14 to 17 (men) and 26 to 30 (women).
Golf Handicap

Avg. Handicap by Age

12.7 8.5 11.1 11.2 13.2

Under 18 18 - 25 26 - 29 30 - 35 36 - 40
Golf Handicap

Avg. Handicap by Region

West: 10.0, Midwest: 9.2, Northeast: 10.7, South: 9.6
Golf Handicap

Avg. Handicap by Facility

<table>
<thead>
<tr>
<th>Facility</th>
<th>Avg. Handicap</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private</td>
<td>6.5</td>
</tr>
<tr>
<td>Public</td>
<td>10.9</td>
</tr>
<tr>
<td>Semi-Private</td>
<td>8.9</td>
</tr>
</tbody>
</table>
Golf Tenure

<table>
<thead>
<tr>
<th>Duration</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 2 years</td>
<td>6%</td>
</tr>
<tr>
<td>2 to 5 years</td>
<td>18%</td>
</tr>
<tr>
<td>6 to 10 years</td>
<td>27%</td>
</tr>
<tr>
<td>11 to 15 years</td>
<td>22%</td>
</tr>
<tr>
<td>More than 15 years</td>
<td>27%</td>
</tr>
</tbody>
</table>

Average years a golfer: 11 years

Roughly half (49%) have been a golfer for more than 10 years.

Approximately one-quarter (24%) have adopted golf within the last 5 years.
MILLENNIAL GOLF HABITS
Why Golf?

Reasons for Playing Golf:

- To hang out with friends: 88%
- To get outdoors: 85%
- For athletic competition: 84%
- For exercise and wellness: 69%
- For business purposes: 34%
- To grow my network: 32%
More than one-third (35%) play 40 or more rounds each year.

Consistent with *industry averages* of 20.8 rounds per year (*men*) and 34.0 rounds per year (*‘avid’ golfers*).

*via National Golf Foundation (NGF)*
Annual Rounds

Avg. Annual Rounds by Age

<table>
<thead>
<tr>
<th>Age</th>
<th>Rounds</th>
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</thead>
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<tr>
<td>Under 18</td>
<td>39.5</td>
</tr>
<tr>
<td>18 - 25</td>
<td>31.3</td>
</tr>
<tr>
<td>26 - 29</td>
<td>28.6</td>
</tr>
<tr>
<td>30 - 35</td>
<td>28.9</td>
</tr>
<tr>
<td>36 - 40</td>
<td>33.7</td>
</tr>
<tr>
<td>Overall</td>
<td>30.7</td>
</tr>
</tbody>
</table>
Annual Rounds

Avg. Annual Rounds by Region

West: 31.8
Midwest: 30.3
Northeast: 28.7
South: 31.8
Overall: 30.7
Annual Rounds

Avg. Annual Rounds by Facility

- Private: 34.2
- Public: 29.1
- Semi-Private: 32.9
- Overall: 30.7
Annual Rounds

Avg. Annual Rounds by Handicap

- 0 or better: 42.2
- 0 to 7: 34.9
- 8 to 17: 28.2
- 18 to 27: 21.8
- 28+: 18.1
- Overall: 30.7
More than four in five (83%) prefer to spend $50 or less on a normal round of golf.

Six in ten (60%) typically spend between $25 and $50.
Approximately one-third (32%) play 9-hole rounds for at least one out of every four of their rounds or more.

Only 10% play 9-hole rounds more than half of the time.

Average 9-Hole Rounds: 19.9%
9-Hole Rounds

Avg. 9-Hole Rounds by Age

- Under 18: 28%
- 18 - 25: 24%
- 26 - 29: 16%
- 30 - 35: 12%
- 36 - 40: 15%
- Overall: 20%
9-Hole Rounds

Avg. 9-Hole Rounds by Region

- West: 18%
- Midwest: 21%
- Northeast: 22%
- South: 18%
- Overall: 20%
9-Hole Rounds

Avg. 9-Hole Rounds by Facility

- Private: 23%
- Public: 19%
- Semi-Private: 20%
- Overall: 20%
9-Hole Rounds

Avg. 9-Hole Rounds by Handicap

- 0 or better: 20%
- 0 to 7: 20%
- 8 to 17: 19%
- 18 to 27: 20%
- 28+: 28%
- Overall: 20%
## Preferred Golf Schedule

<table>
<thead>
<tr>
<th>Day</th>
<th>N/A</th>
<th>Early Morning</th>
<th>Morning-Midday</th>
<th>Afternoon</th>
<th>Late Afternoon</th>
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</thead>
<tbody>
<tr>
<td>Monday-Thursday</td>
<td>11%</td>
<td>26%</td>
<td>25%</td>
<td>46%</td>
<td>56%</td>
</tr>
<tr>
<td>Friday</td>
<td>6%</td>
<td>28%</td>
<td>31%</td>
<td>53%</td>
<td>51%</td>
</tr>
<tr>
<td>Saturday</td>
<td>3%</td>
<td>67%</td>
<td>62%</td>
<td>43%</td>
<td>33%</td>
</tr>
<tr>
<td>Sunday</td>
<td>4%</td>
<td>63%</td>
<td>59%</td>
<td>44%</td>
<td>33%</td>
</tr>
</tbody>
</table>
Preferred Golf Schedule

**Golf Schedule: Monday-Thursday**

- N/A: 11%
- Early Morning: 26%
- Morning-Midday: 25%
- Afternoon: 46%
- Late Afternoon: 56%
Preferred Golf Schedule

Golf Schedule: Friday

- N/A: 6%
- Early Morning: 28%
- Morning-Midday: 31%
- Afternoon: 53%
- Late Afternoon: 51%
Preferred Golf Schedule

Golf Schedule: Saturday

- Early Morning: 67%
- Morning-Midday: 62%
- Afternoon: 43%
- Late Afternoon: 33%
Preferred Golf Schedule

Golf Schedule: **Sunday**

- Early Morning: 63%
- Morning-Midday: 59%
- Afternoon: 44%
- Late Afternoon: 33%

N/A: 4%
Nearly nine out of ten Millennials (88%) typically play golf with their friends or family, with a wide majority (71%) playing with friends most often.

Other golf partners (2%) might include:

- A combination of all
- Business associates, colleagues, clients, coworkers
- Teammates, other club members
- Solo play, personal practice
Two-thirds of Millennials (65%) typically play golf at public golf courses most often.

The remaining third is evenly split between private and semi-private golf courses.
Golf Facility: Private

<table>
<thead>
<tr>
<th>AGE</th>
<th>HANDICAP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 18</td>
<td>Overall</td>
</tr>
<tr>
<td>18 - 25</td>
<td></td>
</tr>
<tr>
<td>26 - 29</td>
<td></td>
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<tr>
<td>30 - 35</td>
<td></td>
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<tr>
<td>36 - 40</td>
<td></td>
</tr>
<tr>
<td>West</td>
<td></td>
</tr>
<tr>
<td>Midwest</td>
<td></td>
</tr>
<tr>
<td>Northeast</td>
<td></td>
</tr>
<tr>
<td>South</td>
<td></td>
</tr>
<tr>
<td>0 or better</td>
<td></td>
</tr>
<tr>
<td>0 to 7</td>
<td></td>
</tr>
<tr>
<td>8 to 17</td>
<td></td>
</tr>
<tr>
<td>18 to 27</td>
<td></td>
</tr>
<tr>
<td>28+</td>
<td></td>
</tr>
</tbody>
</table>

AGE REGION HANDICAP ALL

- Under 18: 10%
- 18 - 25: 21%
- 26 - 29: 14%
- 30 - 35: 10%
- 36 - 40: 13%
- West: 13%
- Midwest: 18%
- Northeast: 18%
- South: 19%
- 0 or better: 40%
- 0 to 7: 25%
- 8 to 17: 10%
- 18 to 27: 8%
- 28+: 6%
- Overall: 17%
Golf Facility: Public

AGE
- Under 18: 60%
- 18 - 25: 60%
- 26 - 29: 75%
- 30 - 35: 70%
- 36 - 40: 69%
- West: 77%
- Midwest: 69%
- Northeast: 61%
- South: 60%

REGION
- 0 or better: 33%
- 0 to 7: 57%
- 8 to 17: 73%
- 18 to 27: 80%
- 28+: 79%

HANDICAP
- Overall: 65%
<table>
<thead>
<tr>
<th>AGE</th>
<th>Handicap</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 18</td>
<td>30%</td>
</tr>
<tr>
<td>18-25</td>
<td>18%</td>
</tr>
<tr>
<td>26-29</td>
<td>11%</td>
</tr>
<tr>
<td>30-35</td>
<td>19%</td>
</tr>
<tr>
<td>36-40</td>
<td>19%</td>
</tr>
<tr>
<td>West</td>
<td>10%</td>
</tr>
<tr>
<td>Midwest</td>
<td>13%</td>
</tr>
<tr>
<td>Northeast</td>
<td>21%</td>
</tr>
<tr>
<td>South</td>
<td>21%</td>
</tr>
<tr>
<td>0 or better</td>
<td>27%</td>
</tr>
<tr>
<td>0 to 7</td>
<td>18%</td>
</tr>
<tr>
<td>8 to 17</td>
<td>17%</td>
</tr>
<tr>
<td>18 to 27</td>
<td>13%</td>
</tr>
<tr>
<td>28+</td>
<td>15%</td>
</tr>
<tr>
<td>Overall</td>
<td>17%</td>
</tr>
</tbody>
</table>
Three-quarters (75%) are prevented from playing more golf due to work commitments.

Other inhibitors (6%) might include:

- **Logistics**: location, transportation, accessibility, proximity to course.
- **Seasons**: cold weather, daylight.
- **Skill**: need to improve, can’t afford instruction/lessons.
Golf Inhibitors

Golf Inhibitor: Work Commitments

<table>
<thead>
<tr>
<th>AGE</th>
<th>REGION</th>
<th>FACILITY</th>
<th>HANDICAP</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 18</td>
<td>West</td>
<td>75%</td>
<td>65%</td>
<td>50%</td>
</tr>
<tr>
<td>18 - 25</td>
<td>Midwest</td>
<td>76%</td>
<td>75%</td>
<td>73%</td>
</tr>
<tr>
<td>26 - 29</td>
<td>Northeast</td>
<td>77%</td>
<td>72%</td>
<td>79%</td>
</tr>
<tr>
<td>30 - 35</td>
<td>South</td>
<td>75%</td>
<td>75%</td>
<td>72%</td>
</tr>
<tr>
<td>36 - 40</td>
<td>Private</td>
<td>75%</td>
<td>75%</td>
<td>74%</td>
</tr>
<tr>
<td></td>
<td>Public</td>
<td>73%</td>
<td>65%</td>
<td>79%</td>
</tr>
<tr>
<td></td>
<td>Semi-Private</td>
<td>72%</td>
<td>70%</td>
<td>75%</td>
</tr>
<tr>
<td></td>
<td>0 or better</td>
<td>0 to 7</td>
<td>18 to 27</td>
<td>79%</td>
</tr>
<tr>
<td></td>
<td>8 to 17</td>
<td>74%</td>
<td>18+</td>
<td>79%</td>
</tr>
<tr>
<td></td>
<td>28+</td>
<td>Overall</td>
<td>All</td>
<td>75%</td>
</tr>
</tbody>
</table>
Golf Inhibitors

Golf Inhibitor: Cost

Under 18 | 18 - 25 | 26 - 29 | 30 - 35 | 36 - 40 | West | Midwest | Northeast | South | Private | Public | Semi-Private | 0 or better | 0 to 7 | 8 to 17 | 18 to 27 | 28+ | Overall

50% | 66% | 54% | 42% | 32% | 62% | 57% | 57% | 55% | 38% | 64% | 51% | 48% | 52% | 62% | 61% | 64% | 57%
# Golf Inhibitors

## Golf Inhibitor: Family Commitments

<table>
<thead>
<tr>
<th>AGE</th>
<th>18 - 25</th>
<th>26 - 29</th>
<th>30 - 35</th>
<th>36 - 40</th>
<th>West</th>
<th>Midwest</th>
<th>Northeast</th>
<th>South</th>
<th>Private</th>
<th>Public</th>
<th>Semi-Private</th>
<th>0 or better</th>
<th>0 to 7</th>
<th>8 to 17</th>
<th>18 to 27</th>
<th>28+</th>
<th>Overall</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 18</td>
<td>20%</td>
<td>34%</td>
<td>53%</td>
<td>54%</td>
<td>35%</td>
<td>35%</td>
<td>27%</td>
<td>29%</td>
<td>31%</td>
<td>31%</td>
<td>29%</td>
<td>33%</td>
<td>27%</td>
<td>31%</td>
<td>30%</td>
<td>31%</td>
<td>60%</td>
</tr>
</tbody>
</table>

**AGE REGION FACILITY HANDICAP All**
Golf Inhibitors

Golf Inhibitor: No Playing Partners

<table>
<thead>
<tr>
<th>AGE</th>
<th>10%</th>
<th>21%</th>
<th>27%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 18</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18 - 25</td>
<td></td>
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<td>26 - 29</td>
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<td>30 - 35</td>
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<td></td>
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<tr>
<td>36 - 40</td>
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</table>

<table>
<thead>
<tr>
<th>REGION</th>
<th>West</th>
<th>Midwest</th>
<th>Northeast</th>
<th>South</th>
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</thead>
<tbody>
<tr>
<td>17%</td>
<td>23%</td>
<td>26%</td>
<td>17%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FACILITY</th>
<th>Private</th>
<th>Public</th>
<th>Semi-Private</th>
</tr>
</thead>
<tbody>
<tr>
<td>21%</td>
<td>22%</td>
<td>17%</td>
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<table>
<thead>
<tr>
<th>HANDICAP</th>
<th>0 or better</th>
<th>0 to 7</th>
<th>8 to 17</th>
<th>18 to 27</th>
<th>28+</th>
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<tr>
<td>14%</td>
<td>22%</td>
<td>20%</td>
<td>27%</td>
<td>15%</td>
<td>21%</td>
</tr>
</tbody>
</table>

Overall

Golf Inhibitor: No Playing Partners

10% | 21% | 27% | 17% | 23% | 26% | 17% | 21% | 22% | 17% | 14% | 22% | 20% | 27% | 15% | 21%
Millennials base their decision on where to play golf primarily on the basis of course condition and overall price.

Decisions are affected by secondary factors such as location and friends who play there, though at a lower priority.
MILLENNIALS & PRIVATE CLUBS
Joining a Private Club

- Will consider joining in the future
- Do not plan on joining a private club
- Already a member of a private club

Joining a Private Club: **Interest**

Three-quarters (75%) of Millennials will consider joining a private club in the future.

12% are already a private club member while 13% are not planning to join at all.
Joining a Private Club

Nearly half (48%) of participating Millennials plan on joining a private club within the next 3 to 10 years.

More than one-third (35%) plan to do so within the next 5 years or less.

On average, Millennials interested in joining a private club plan to do so in approximately 7.3 years.

<table>
<thead>
<tr>
<th>Timeline</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do not plan on joining</td>
<td>13%</td>
</tr>
<tr>
<td>Already a member</td>
<td>12%</td>
</tr>
<tr>
<td>1 - 2 years</td>
<td>11%</td>
</tr>
<tr>
<td>3 - 5 years</td>
<td>25%</td>
</tr>
<tr>
<td>6 - 10 years</td>
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<tr>
<td>11 - 15 years</td>
<td>9%</td>
</tr>
<tr>
<td>More than 15 years</td>
<td>8%</td>
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</tbody>
</table>
Joining a Private Club

Join Timeline: Avg. Years by Age

- Under 18: 11.5 years
- 18 - 25: 8.3 years
- 26 - 29: 6.1 years
- 30 - 35: 5.7 years
- 36 - 40: 5.7 years
- Overall: 7.3 years
Joining a Private Club

Join Timeline: Avg. Years by Region

- West: 7.6
- Midwest: 8.0
- Northeast: 6.6
- South: 7.1
- Overall: 7.3
Joining a Private Club

Join Timeline: Avg. Years by Facility

- Private: 6.6 years
- Public: 7.7 years
- Semi-Private: 6.3 years
- Overall: 7.3 years
Joining a Private Club

Join Timeline: Avg. Years by Handicap

<table>
<thead>
<tr>
<th>Handicap Level</th>
<th>Avg. Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 or better</td>
<td>6.7</td>
</tr>
<tr>
<td>0 to 7</td>
<td>6.9</td>
</tr>
<tr>
<td>8 to 17</td>
<td>7.6</td>
</tr>
<tr>
<td>18 to 27</td>
<td>8.3</td>
</tr>
<tr>
<td>28+</td>
<td>8.6</td>
</tr>
<tr>
<td>Overall</td>
<td>7.3</td>
</tr>
</tbody>
</table>
Joining a Private Club

Already a Private Club Member

- **AGE**: Under 18 (20%), 18-25 (13%), 26-29 (9%), 30-35 (9%), 36-40 (15%), 41-50 (8%), 51-60 (9%), 61-70 (15%), 71+ (15%), Overall (12%)

- **REGION**: West (8%), Midwest (9%), Northeast (15%), South (14%), Overall (52%)

- **FACILITY**: Private (2%), Public (10%), Semi-Private (17%), Overall (24%)

- **HANDICAP**: 0 or better (2%), 0 to 7 (8%), 8 to 17 (6%), 18 to 27 (3%), 28+ (12%), Overall (12%)

**GLOBAL GOLF UNIFIED**

**NEXTGENGOLF**

77
## Joining a Private Club

### Will Consider Joining in the Future

<table>
<thead>
<tr>
<th>Age Region</th>
<th>Overall</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 18</td>
<td>60%</td>
</tr>
<tr>
<td>18 - 25</td>
<td>79%</td>
</tr>
<tr>
<td>26 - 29</td>
<td>76%</td>
</tr>
<tr>
<td>30 - 35</td>
<td>74%</td>
</tr>
<tr>
<td>36 - 40</td>
<td>53%</td>
</tr>
<tr>
<td>West</td>
<td>76%</td>
</tr>
<tr>
<td>Midwest</td>
<td>79%</td>
</tr>
<tr>
<td>Northeast</td>
<td>74%</td>
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<tr>
<td>South</td>
<td>74%</td>
</tr>
</tbody>
</table>

### Handicap

<table>
<thead>
<tr>
<th>Facility</th>
<th>Overall</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public</td>
<td>82%</td>
</tr>
<tr>
<td>Semi-Private</td>
<td>81%</td>
</tr>
<tr>
<td>0 or better</td>
<td>73%</td>
</tr>
<tr>
<td>0 to 7</td>
<td>73%</td>
</tr>
<tr>
<td>8 to 17</td>
<td>78%</td>
</tr>
<tr>
<td>18 to 27</td>
<td>77%</td>
</tr>
<tr>
<td>28+</td>
<td>67%</td>
</tr>
</tbody>
</table>

### Region

- West: 76%
- Midwest: 79%
- Northeast: 74%
- South: 74%

### All

- Overall: 75%
Joining a Private Club

### Do Not Plan on Joining

#### AGE
- Under 18: 20%
- 18 - 25: 8%
- 26 - 29: 14%
- 30 - 35: 17%
- 36 - 40: 32%

#### REGION
- West: 16%
- Midwest: 12%
- Northeast: 11%
- South: 13%

#### FACILITY
- Public: 17%
- Semi-Private: 9%
- 0 or better: 3%
- 0 to 7: 10%
- 8 to 17: 14%
- 18 to 27: 17%
- 28+: 30%

#### HANDICAP
- Overall: 13%

---

**Source:** NEXTGENGOLF

**Note:** The data represents the proportion of individuals who do not plan on joining a private club, categorized by age, region, facility type, and handicap.
Decision Factors

Factors Influencing Decision to Join a Private Club

1. Recommendations from Friends, Family, Colleagues (83%)

2. A positive experience attending a tournament or wedding at the club (64%)

3. A reception or cocktail party hosted by the club to promote membership (25%)

Socialization is highly important, leveraging existing relationships can influence Millennials to join.

Opportunities exist to introduce Millennials to the club through events both golf-related and social-focused.
Decision Factors

Golf alone is not enough.

• The game is difficult, time-consuming, and expensive – all strikes against it with Millennials.

• Non-golf amenities and social components matter and are influential in Millennial decisions to join a private club.
Amenities & Socialization

Important Non-Golf Amenities & Social Components

- Fitness: 71%
- Access for the entire family: 65%
- Pool: 62%
- Socialization and events: 57%
- Tennis: 28%
- Greater emphasis on technology, music: 18%
More than four in ten (43%) would prefer to pay more annually rather than an entrance fee.
# Entrance Fee Tolerance

## Tolerance to Pay Entrance Fee: Pay More Annually

<table>
<thead>
<tr>
<th>AGE</th>
<th>Under 18</th>
<th>18 - 25</th>
<th>26 - 29</th>
<th>30 - 35</th>
<th>36 - 40</th>
</tr>
</thead>
<tbody>
<tr>
<td>West</td>
<td>41%</td>
<td>45%</td>
<td>50%</td>
<td>54%</td>
<td></td>
</tr>
<tr>
<td>Midwest</td>
<td>41%</td>
<td>45%</td>
<td>44%</td>
<td>42%</td>
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<tr>
<td>Northeast</td>
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<tr>
<td>South</td>
<td>28%</td>
<td>49%</td>
<td>38%</td>
<td>38%</td>
<td>46%</td>
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<tr>
<td>Private</td>
<td>28%</td>
<td>49%</td>
<td>38%</td>
<td>38%</td>
<td>46%</td>
</tr>
<tr>
<td>Public</td>
<td>28%</td>
<td>49%</td>
<td>38%</td>
<td>38%</td>
<td>46%</td>
</tr>
<tr>
<td>Semi-Private</td>
<td>28%</td>
<td>49%</td>
<td>38%</td>
<td>38%</td>
<td>46%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HANDICAP</th>
<th>Overall</th>
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</thead>
<tbody>
<tr>
<td>0 or better</td>
<td>20%</td>
</tr>
<tr>
<td>0 to 7</td>
<td>49%</td>
</tr>
<tr>
<td>8 to 17</td>
<td>38%</td>
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<tr>
<td>18 to 27</td>
<td>38%</td>
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<tr>
<td>28+</td>
<td>66%</td>
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<tr>
<td>ALL</td>
<td>43%</td>
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</tbody>
</table>
Millennials willing to pay an entrance fee to join a private club (57%) would pay approximately $5,886 on average.
<table>
<thead>
<tr>
<th>AGE</th>
<th>REGION</th>
<th>FACILITY</th>
<th>HANDICAP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 18</td>
<td>West</td>
<td>Private</td>
<td>0 or better</td>
</tr>
<tr>
<td>18-25</td>
<td>Midwest</td>
<td>Public</td>
<td>0 to 7</td>
</tr>
<tr>
<td>26-29</td>
<td>Northeast</td>
<td>Semi-Private</td>
<td>8 to 17</td>
</tr>
<tr>
<td>30-35</td>
<td>South</td>
<td>Private</td>
<td>18 to 27</td>
</tr>
<tr>
<td>36-40</td>
<td>West</td>
<td>Public</td>
<td>28+</td>
</tr>
</tbody>
</table>

Entrance Fee Tolerance

Avg. Entrance Fee Millennials Willing to Pay

<table>
<thead>
<tr>
<th>Age Region</th>
<th>West</th>
<th>Midwest</th>
<th>Northeast</th>
<th>South</th>
<th>Private</th>
<th>Public</th>
<th>Semi-Private</th>
<th>0 or better</th>
<th>0 to 7</th>
<th>8 to 17</th>
<th>18 to 27</th>
<th>28+</th>
<th>Overall</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 18</td>
<td>$6,563</td>
<td>$5,434</td>
<td>$5,756</td>
<td>$6,032</td>
<td>$7,990</td>
<td>$4,988</td>
<td>$6,203</td>
<td>$8,205</td>
<td>$6,481</td>
<td>$5,130</td>
<td>$4,649</td>
<td>$5,909</td>
<td>$5,886</td>
</tr>
<tr>
<td>18-25</td>
<td>$6,424</td>
<td>$5,000</td>
<td>$5,025</td>
<td>$5,069</td>
<td>$6,540</td>
<td>$5,434</td>
<td>$5,756</td>
<td>$6,032</td>
<td>$7,990</td>
<td>$4,988</td>
<td>$6,203</td>
<td>$8,205</td>
<td>$6,481</td>
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<tr>
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<td>$5,069</td>
<td>$6,540</td>
<td>$5,434</td>
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<td>$4,988</td>
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<td>$5,069</td>
<td>$6,540</td>
<td>$5,434</td>
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<td>$8,205</td>
<td>$6,481</td>
<td>$4,649</td>
</tr>
<tr>
<td>36-40</td>
<td>$5,000</td>
<td>$5,025</td>
<td>$5,069</td>
<td>$6,540</td>
<td>$5,434</td>
<td>$5,756</td>
<td>$6,032</td>
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<td>$4,988</td>
<td>$6,203</td>
<td>$8,205</td>
<td>$6,481</td>
<td>$5,909</td>
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<td>$5,756</td>
<td>$6,032</td>
<td>$7,990</td>
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<td>$8,205</td>
<td>$6,481</td>
<td>$5,130</td>
<td>$4,649</td>
<td>$5,909</td>
<td>$5,886</td>
</tr>
</tbody>
</table>
## Membership Offerings

### Preferred & Appealing Membership Offerings: Flexible

<table>
<thead>
<tr>
<th>Offer</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>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</td>
<td>51%</td>
</tr>
<tr>
<td>A discounted entrance fee payable right away</td>
<td>48%</td>
</tr>
<tr>
<td>Trial memberships</td>
<td>47%</td>
</tr>
<tr>
<td>An entrance fee amortized over 2-3 years</td>
<td>26%</td>
</tr>
<tr>
<td>An entrance fee amortized over 4-5 years</td>
<td>20%</td>
</tr>
<tr>
<td>An entrance fee amortized over more than 5 years</td>
<td>17%</td>
</tr>
<tr>
<td>A higher entrance fee payable upon reaching full membership (typically age 40)</td>
<td>17%</td>
</tr>
</tbody>
</table>
Of Millennials who would prefer to pay more annually rather than an entrance fee, nearly half (46%) cited lack of lump sum funds to pay the entrance fee as the primary reason why.

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lack of lump sum funds</td>
<td>46%</td>
</tr>
<tr>
<td>Fear of commitment to one club</td>
<td>35%</td>
</tr>
<tr>
<td>Unsure how much I would use the club</td>
<td>32%</td>
</tr>
<tr>
<td>Fear of costs changing in the future</td>
<td>27%</td>
</tr>
<tr>
<td>Fear of relocation due to work</td>
<td>23%</td>
</tr>
<tr>
<td>Uncertain how long I will play golf</td>
<td>5%</td>
</tr>
</tbody>
</table>
Annual Fee Tolerance

Avg. Annual Fee Tolerance: $4,014

Roughly half (49%) would prefer to pay annual fees of $3,000 or less to belong to a private club.

Less than one-fifth (16%) would be willing to pay more than $5,000 in annual fees.
Annual Fee Tolerance

Avg. Annual Fee Tolerance by Age

- Under 18: $4,556
- 18 - 25: $4,129
- 26 - 29: $3,677
- 30 - 35: $4,020
- 36 - 40: $3,924
- Overall: $4,014
Annual Fee Tolerance

Avg. Annual Fee Tolerance by Region

- West: $4,111
- Midwest: $4,012
- Northeast: $4,042
- South: $3,970
- Overall: $4,014
Annual Fee Tolerance

**Avg. Annual Fee Tolerance by Facility**

- **Private**: $5,119
- **Public**: $3,700
- **Semi-Private**: $4,100
- **Overall**: $4,014
Annual Fee Tolerance

Avg. Annual Fee Tolerance by Handicap

- 0 or better: $4,919
- 0 to 7: $4,381
- 8 to 17: $3,734
- 18 to 27: $3,481
- 28+: $3,129
- Overall: $4,014
## Barriers to Joining

### Biggest Barriers to Joining a Private Club: Costs

<table>
<thead>
<tr>
<th>Expense</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monthly or annual dues</td>
<td>77%</td>
</tr>
<tr>
<td>Initiation fee to join club</td>
<td>73%</td>
</tr>
<tr>
<td>Concern of costs changing from year to year</td>
<td>28%</td>
</tr>
<tr>
<td>Not knowing anyone at club</td>
<td>23%</td>
</tr>
<tr>
<td>I have never been invited to join a club</td>
<td>22%</td>
</tr>
<tr>
<td>Lifestyle and availability of time</td>
<td>19%</td>
</tr>
<tr>
<td>Age of other members</td>
<td>17%</td>
</tr>
<tr>
<td>Not feeling welcome at the club</td>
<td>11%</td>
</tr>
<tr>
<td>Location (transportation difficulty)</td>
<td>10%</td>
</tr>
<tr>
<td>Lack of value for my family and children</td>
<td>7%</td>
</tr>
<tr>
<td>Rules are too restrictive</td>
<td>5%</td>
</tr>
</tbody>
</table>
MILLENNIAL TRAVEL & MOBILITY
Golf Trips

Organizing Golf Trips: Frequency

Two-thirds (67%) of Millennials organize a golf trip or ‘getaway’ with their friends and family.

More than half (53%) do so at least once per year.
Golf Trips

Golf Trip Frequency: Never

<table>
<thead>
<tr>
<th>AGE</th>
<th>50%</th>
<th>37%</th>
<th>31%</th>
<th>23%</th>
<th>30%</th>
<th>36%</th>
<th>25%</th>
<th>33%</th>
<th>38%</th>
<th>19%</th>
<th>30%</th>
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<th>25%</th>
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<tbody>
<tr>
<td>Under 18</td>
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AGE REGION FACILITY HANDICAP ALL
# Golf Trips

## Golf Trip Frequency: Once Per Year

<table>
<thead>
<tr>
<th>AGE</th>
<th>WEST</th>
<th>MIDWEST</th>
<th>NORTHEAST</th>
<th>SOUTH</th>
<th>PRIVATE</th>
<th>PUBLIC</th>
<th>SEMI-PRIVATE</th>
<th>0 OR BETTER</th>
<th>0 TO 7</th>
<th>8 TO 17</th>
<th>18 TO 27</th>
<th>28+</th>
<th>OVERALL</th>
</tr>
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<tbody>
<tr>
<td>Under 18</td>
<td>20%</td>
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<td>35%</td>
<td>33%</td>
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<td>Overall</td>
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</tbody>
</table>
One-quarter (25%) have taken a golf trip to Myrtle Beach. More than half (52%) are thinking about doing so in the future.

- Yes 25%
- No, but thinking about going to Myrtle Beach in future 52%
- No, not planning to take a golf trip to Myrtle Beach 23%
Golf Destinations

Golf Vacations: Favorite State Destination

- **Major Destinations**
  - (5%+ interest)

- **Moderate Destinations**
  - (1-5% interest)

- **Not a Destination**
  - (<1% interest)
Golf Destinations

Favorite destinations for golf trips among Millennials are states with at least one of the following attributes:

- Aquatic/epipelagic access
- Favorable weather/climate
- Scenic landscape
- Vibrant social/night life

Golf Vacations: Top 15 State Destinations

- Florida: 26%
- South Carolina: 15%
- California: 15%
- Arizona: 10%
- North Carolina: 5%
- Hawaii: 4%
- Colorado: 2%
- Michigan: 2%
- Oregon: 2%
- Georgia: 2%
- Nevada: 2%
- Wisconsin: 2%
- Texas: 1.3%
- Alabama: 1.2%
- Pennsylvania: 0.8%

Chart represents 92% of respondents.
Golf Trip Duration

Avg. Golf Trip Duration: 3.1 days

Two-thirds (66%) of Millennials indicated that their golf trips span 3 days or less.

Roughly half (48%) allocate 2-3 days for golf trips, averaging approximately 3.1 days overall.
Golf Trip Duration

<table>
<thead>
<tr>
<th>Age Region</th>
<th>Overall</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 18</td>
<td>2.9</td>
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<tr>
<td>18 - 25</td>
<td>3.1</td>
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<tr>
<td>26 - 29</td>
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<td>30 - 35</td>
<td>3.1</td>
</tr>
<tr>
<td>36 - 40</td>
<td>3.5</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Region</th>
<th>West</th>
<th>Midwest</th>
<th>Northeast</th>
<th>South</th>
</tr>
</thead>
<tbody>
<tr>
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<td>2.8</td>
<td>3.4</td>
<td>3.2</td>
<td>2.9</td>
</tr>
<tr>
<td>Midwest</td>
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<td>3.2</td>
<td>3.0</td>
<td>3.4</td>
</tr>
<tr>
<td>Northeast</td>
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<td>3.0</td>
<td>3.0</td>
<td>3.3</td>
</tr>
<tr>
<td>South</td>
<td>2.9</td>
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<td>3.0</td>
<td>2.7</td>
</tr>
<tr>
<td>Overall</td>
<td>3.1</td>
<td>3.4</td>
<td>3.0</td>
<td>2.4</td>
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</table>

<table>
<thead>
<tr>
<th>Facility</th>
<th>0 or better</th>
<th>0 to 7</th>
<th>8 to 17</th>
<th>18 to 27</th>
<th>28+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private</td>
<td>3.4</td>
<td>3.3</td>
<td>3.0</td>
<td>2.7</td>
<td>2.4</td>
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<tr>
<td>Public</td>
<td>3.0</td>
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<td>3.0</td>
<td>2.7</td>
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<tr>
<td>Semi-Private</td>
<td>3.0</td>
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<td>3.0</td>
<td>2.7</td>
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<tr>
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<td>3.4</td>
<td>3.3</td>
<td>3.0</td>
<td>2.7</td>
<td>2.4</td>
</tr>
</tbody>
</table>

Avg. Golf Trip Length: Days
While on golf trips, four in ten (40%) Millennials spend under $150 per day on golf, accommodations, and food. Only 14% of Millennials spend more than $250 per day.
Golf Trip Spend

Avg. Spend Per Day by Age

- Under 18: $170
- 18 - 25: $175
- 26 - 29: $186
- 30 - 35: $199
- 36 - 40: $187
- Overall: $182
Golf Trip Spend

Avg. Spend Per Day by Region

- West: $185
- Midwest: $179
- Northeast: $184
- South: $181
- Overall: $182
Golf Trip Spend

Avg. Spend Per Day by Facility

- Private: $201
- Public: $174
- Semi-Private: $189
- Overall: $182
Golf Trip Spend

**Avg. Spend Per Day by Handicap**

- **0 or better**: $193
- **0 to 7**: $188
- **8 to 17**: $177
- **18 to 27**: $176
- **28+**: $162
- **Overall**: $182
## Golf Trip Spend

### Avg. Golf Trip: Spend per Day

<table>
<thead>
<tr>
<th>AGE</th>
<th>REGION</th>
<th>FACILITY</th>
<th>HANDICAP</th>
<th>ALL</th>
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</thead>
<tbody>
<tr>
<td>Under 18</td>
<td>West</td>
<td>Private</td>
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</tr>
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<td>36-40</td>
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</table>

**Average Spending per Day:**
- $170 for Under 18
- $175 for 18-25
- $186 for 26-29
- $185 for 30-35
- $181 for 36-40
- $201 for West
- $179 for Midwest
- $184 for Northeast
- $185 for South
- $174 for Private
- $189 for Public
- $193 for Semi-Private
- $188 for 0 to 7
- $177 for 8 to 17
- $176 for 18 to 27
- $162 for 28+
- $182 for Overall
ONWARD
Takeaways

Traditional membership offerings are less appealing to Millennials than previous generations.

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 flexible membership options, pay-for-use categories, and trial programs that 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.
Takeaways

NON-GOLF AMENITIES MATTER

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.
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.
Takeaways

Seize the opportunity to capture Millennials earlier and consider ways to recruit them early and retain them by appealing to values.

For clubs, joining aspirations are higher at a younger age while joining income is higher at an older age.

Public facilities generate higher utilization 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 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.
Takeaways

TWO-PRONGED MEMBERSHIP STRATEGY

Age 33 is the ‘sweet spot’ when Millennials intend to join a private club. However, conventional entrance fee structures are less attractive to the 30-40 year old age cohort.

Aspirations to join a private club are much higher at a younger age. Clubs must capture Millennials earlier and retain them – before it becomes a family decision.

Requires a membership offering and marketing plan that is customized to each audience.
Future Forecast

AGILITY
Millenials 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+
Millenials want to "connect" with the club to develop a sense of 'ownership' and cultivate a relationship that is more relational than transactional.
Future Forecast

**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 do not appeal to Millennials in the same way as to previous generations.