Life In Flux: The Evolving Priorities of Millennial Golfers

Over 1,600 millennial golfers share their habits, attitudes, and preferences about golf. New 2021 findings reveal what's changing, and what isn't.

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About the Millennial Golfer Study

Who

An ongoing research collaboration between growth-of-the-game organization Nextgengolf and GGA Partners, international consulting firm and trusted advisors to the golf, private club, and leisure industries, with input from the PGA of America.

What

The 5th annual Millennial Golf Industry survey of over 1,600 millennial golfers who shared their habits, attitudes, and preferences about golf. To date, more than 6,800 survey responses have been analyzed during the five-year study.

Why

The study provides valuable insights about young intermediate-aged golfers, the challenges they face, and the opportunities for facilities to help support the long-term sustainability of the game and the industry as a whole.

How

The 2021 Millennial Golf Industry Survey, conducted in November 2020 through January 2021, was administered via an open survey collector link distributed by Nextgengolf through its nationwide email and player network.

Aim

By identifying the evolutions happening with the millennial golfer demographic, facility operators can find ways to adapt and develop their offerings to meet the needs of the next generation of members and customers.

When research began in 2017, the study focused exclusively on golfers in the millennial generation (those born between 1981-1996, roughly ages 25-40 in 2021) and, now, has begun to span two generations. Nearly one-third of the sample audience now technically belongs to Generation Z (those born after 1997, roughly ages 9-24 in 2021), an emergent golfer cohort which the study will continue to evaluate in the future.

Executive Summary

“Not every millennial is the same, but it’s often communicated that way. In our continuous work with the millennial audience and now Generation Z, we see tremendous opportunity for PGA Professionals and golf facilities to deliver value to young people while operating their businesses successfully. The key is understanding how golf businesses mesh with millennial lifestyles.”

MATT WEINBERGER

Nextgengolf Director of Operations, PGA of America

What's Changed & What Hasn't

Demographics

Respondent demographics remain highly consistent with prior research installments, especially in relation to profile factors like age, gender, and race or ethnicity: the average age of respondents is 29 years, 93% identify as male, and 84% are Caucasian or white.

Millennials are growing up and steadily moving their lives along, noteworthy demographic changes from last year's study can be attributed to a general sense of life progression as millennials age:

The percentage of respondents employed increased by 10%, the portion who identify as students decreased by 11%, average household income increased by roughly $5,800 to an average of $96,000, and those who have children increased by 3%.

Golf Habits

Given the active, skilled nature of the audience, it's no surprise that millennials in the sample played slightly more golf this year and their skills continue to improve.

Golf Frequency & Skill

Average annual rounds played reached a new peak: 33.9 rounds, a 9% increase year-over-year and average handicap reached a record low, decreasing 5% to 8.8.

Considering that the National Golf Foundation (NGF) reports[1] the average on-course rounds per golfer to be 20.2, it's safe to say that these millennials play a lot of golf.

Preferred Golf Facilities & Spending

Public courses remain the facility of choice for millennial golfers, 62% of the sample plays public which is down 4% from 2020. The remainder are split between semi-private and private, the latter of which saw a 5% bump in 2021.

Average spend per golf round has increased 28% over the past five years, climbing to $47 from $34 in 2017 at an average rate of $3.25 more per round each year.

This trend has persisted since the start of the study and, this year, falls $11 above the average. NGF's 2021 Graffis Report indicates[1] that the average price for a public golf round (including resorts) is $36.

[1] National Golf Foundation, *The Graffis Report*, 2021. www.ngf.org/graffisreport/, accessed February 2, 2021.

What's Changed & What Hasn't

This year's study asked several new questions about habits related to commuting to play golf, retail purchasing, and participating in off-season golf activities.

Golf Commuter Habits

Millennials mainly play local or nearby courses within a convenient and accessible distance, respondents indicated that it takes them roughly 20 minutes to get to the golf course.

However, they're willing to go the distance to play golf, literally. Respondents say they're ready to dedicate up to a 45 minute drive on average in order to play.

Golf Retail & Off-Season Activities

For a generation characterized as digital natives, it may come as a surprise that a substantial portion of millennials purchase golf equipment and apparel in-person, roughly two-thirds at a sporting goods store and almost half at a course pro shop.

Any perceived emphasis on digital may be warranted when considering the golf activities in which they participate during the off-season: indoor simulators remain at the top of the list (62%) alongside off-course facilities like Topgolf or Drive Shack (44%).

Millennials also exhibit a willingness to engage with golf virtually, through activities such as console videos, fantasy golf or golf gambling, or phone-based golf games.

COVID-19 Pandemic

Naturally, the coronavirus pandemic and ensuing global health crisis is not a topic that was asked about in prior studies. New 2021 findings reveal some silver lining for millennials and their engagement with golf:

Pandemic Has Increased the Importance of Golf to Millennials

Golf has become more important to millennial golfers as a result of the coronavirus pandemic according to 60% of sample – 25% significantly so.

Work-From-Home Flexibility Allows Millennials to Play More Golf

Most millennials have experienced increased work flexibility (84% can work-from-home) which has been favorable for allowing them to get on the course more frequently. Half say work-from-home allows them to play more golf, 18% significantly more.

What's Changed & What Hasn't

Pandemic Has Not Jeopardized Disposable Income for Most Millennials

Millennial golfers in the sample have an average household income of $96,000 and most did not see a change in disposable income since the pandemic began. Approximately three-quarters say that their disposable income has either increased (18%) or remained the same (58%).

Private Clubs

The consistency of figures around millennials' tolerance to pay fees required to join and belong to a private club, as well as their strong interest in non-golf amenities and opportunities for socialization, continue to be among the most noteworthy findings across all five surveys.

Cost Thresholds for Private Club Joining Fees Remain Steady

Roughly 43% prefer to pay more annually rather than an entrance fee and average cost thresholds for entrance fees and annual dues hold steady over time.

In 2021, the average entrance fee tolerance is $5,711 and the average annual dues tolerance is $3,760. A five-year comparison of average fee tolerance is shown on page 23.

Amenities & Socialization are Important to Millennials When Considering a Private Club

A facility package that includes non-golf amenities and social components remains important in millennial considerations for joining a private club. Interest is highest in amenities offering two key attributes: 1) non-traditional golf play like nighttime golf use and simulators; and 2) a multi-use club experience with casual dining, socialization, and fitness.

Significant changes this year include:

- 9% increase in *relaxed dress code*
- 8% increase in an *outdoor bar with fire pits and lounge seating*
- 7% increase in *golf simulators*
- 6% increase in *nighttime golf use*
- 5% decrease in a *swimming pool*
- 4% decrease in *family-friendly or youth programming*

What's Changed & What Hasn't

Social & Environmental Behavior of Golf Venues

Another new topic in this year's survey was the importance and significance of the social and environmental behavior of golf venues. Response data reveal an interesting opportunity for facility operators:

Social & Environmental Behaviors of Golf Venues Matter to Millennials

60% of participating millennials prefer golf venues which actively exhibit these values and 19% consider social and environmental positions to be really important them.

Only one out of five say these behaviors are not important.

Social & Environmental Behavior of Influences Likelihood of Purchase

Nearly two-thirds of millennial golfers (64%) report that a golf venue's social and environmental behavior would influence their likelihood of a purchase.

Over half say it would influence their purchase likelihood some (53%) and 12% say the influence would be considerable.

Millennials Willing to Reward Social & Environmental Behaviors with Their Wallets

If social and environmental practices increased the costs of a golf venue, three-quarters of millennials are willing to pay more – 7.1% more, on average.

While the social/environmental behavior of a golf venue is not currently a make-or-break proposition for millennial golfers, upside potential exists for facilities willing and able to make that investment.

Contents

Demographics

“The key to enjoying golf is people.

Building a network of friends is what makes the difference and keeps folks coming back.”

BEN

Millennial Golfer & Survey Respondent

The Sample: Not Your Average Millennials

The survey sample focused exclusively on an audience of active, avid millennial golfers with prior golf interest and experience playing in tournaments or golf events.

However, respondents must be understood as frequent, highly skilled players and not broadly generalized “normal millennials”. Participants are distinguished by their higher-than-usual income levels as well as their passion for golf and playing ability.

Respondent Profile

The 2021 study brings forward survey findings from over 1,600 millennial golfers across the United States and builds upon research executed annually since 2017.

Respondent demographics remain highly consistent with those exhibited in prior research installments, especially in relation to profile factors like age, gender, and race or ethnicity.

Noteworthy changes from last year's study can be attributed to a general sense of millennial life progression:

% Employed increased 10%

% Students decreased 11%

Average HHI increased $5,800

% Have children increased 3%

AGE

29.2 yrs Average age
73% Under age 35
27% Over age 35

GENDER

93% Male
7% Female
0.1% Undisclosed

RACE/ETHNICITY

84% Caucasian/White
5% Undisclosed
5% Asian/Pacific Islander
3% Hispanic/Latino
2% African American/Black
1.5% Other

OCCUPATION

70% Employed (60% in 2020)
26% Student (37% in 2020)
4% Retired (3% in 2020)

HAVE CHILDREN

26% Have children (23% in 2020)
74% No children (77% in 2020)

HOUSEHOLD INCOME

$96k Average HHI ($90k in 2020) ($78k in 2019)
38% Over $100k (35% in 2020) (29% in 2019)

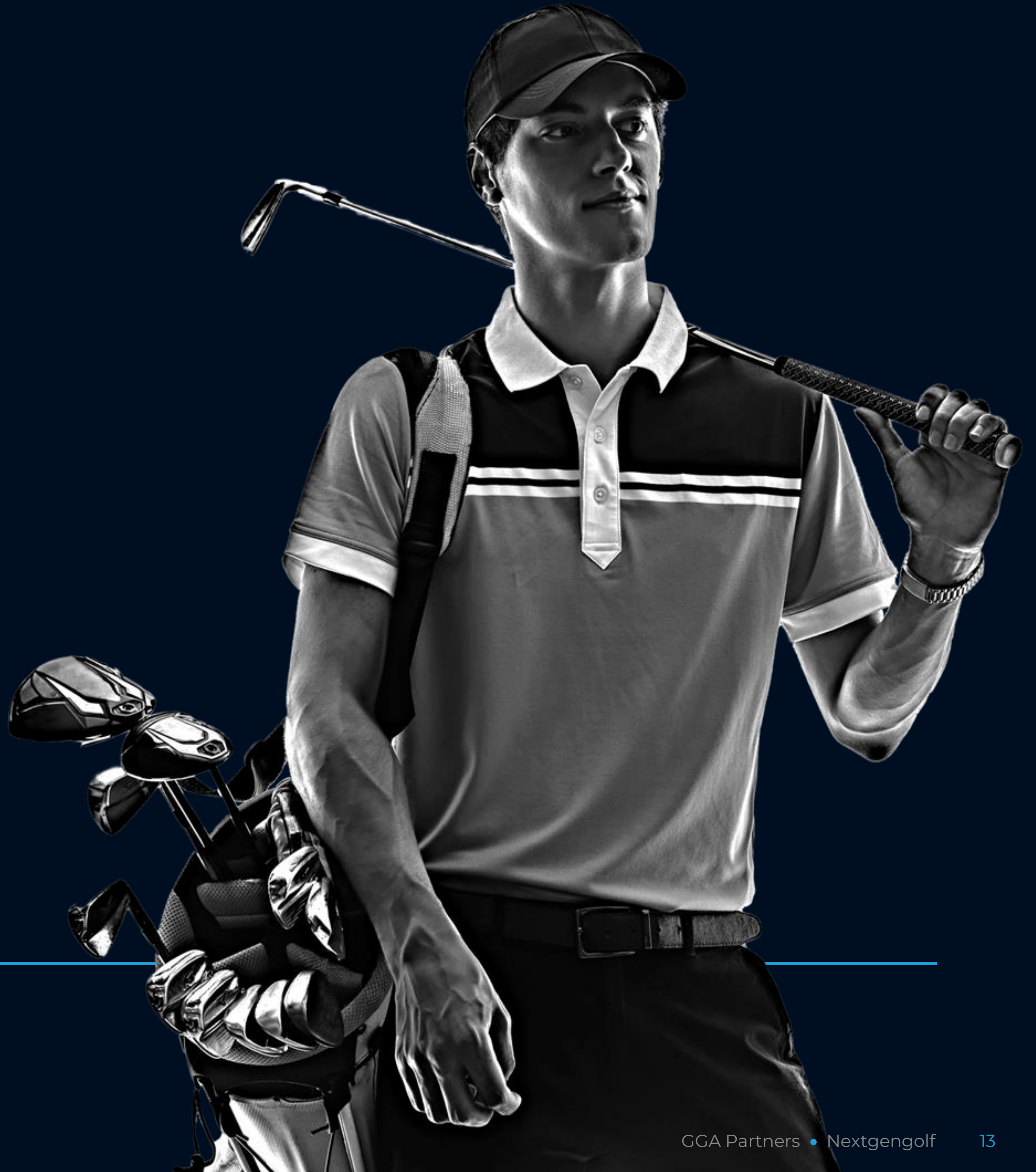
Source: GGA Partners/Nextgengolf Golf Industry Survey 2021.
Note: Averages are weighted. Percentages may not total 100 percent due to rounding.

Golf Habits

“How can golf courses improve?
Easier access to booking online.
Walking-only holes. Riding-only holes.
Pay by the hole. Free days for bringing a friend...”

SCOTT

Millennial Golfer & Survey Respondent



Golf Frequency & Skill

The playing frequency and skill level of participating millennial golfers are generally unchanged from prior years, respondents rank highly on both golf avidity and proficiency.

Nearly half play more than 40 rounds of golf per year and the overall average is 33.9 rounds.

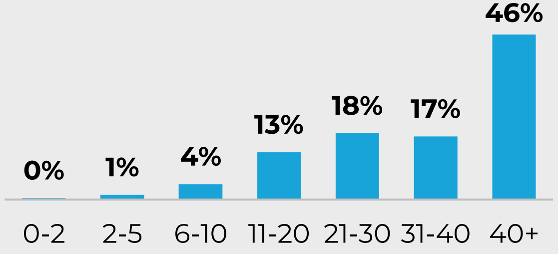
Three-quarters keep an active handicap, averaging 8.8 overall and decreasing 5% from 2020.

ANNUAL ROUNDS

33.9 Average annual rounds
(31.2 in 2020) (30.4 in 2019)
(30.7 in 2018) (31.4 in 2017)

46% Play 40+ rounds per year

6% Play 10 rounds or fewer

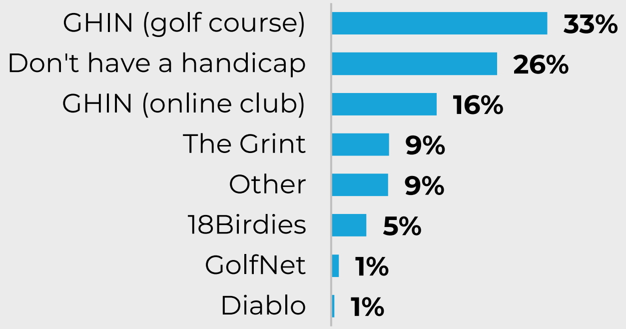


KEEP AN ACTIVE GOLF HANDICAP

74% Have active handicap
(72% in 2020)

26% Don’t have handicap
(28% in 2020)

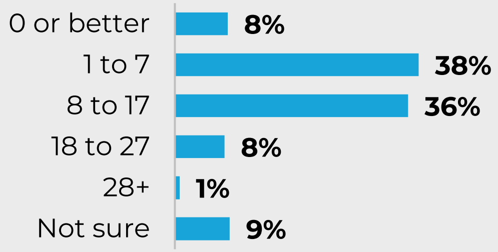
50% Keep it with GHIN
(47% in 2020)



GOLF HANDICAP

8.8 Average handicap
(9.3 in 2020) (9.4 in 2019)
(9.8 in 2018) (9.2 in 2017)

46% Play to a handicap of 7 or better



Source: GGA Partners/Nextgengolf Golf Industry Survey 2016-2021.
Note: Averages are weighted. Percentages may not total 100 percent due to rounding.

Golf Facilities & Spending: Public for Less Than $50

Public courses remain the facility of choice for millennial golfers, 62% of the sample plays public which is down 4% from 2020. The remainder are split between semi-private and private, the latter of which saw a 5% bump in 2021.

On average, millennials normally spend approximately $47 per round. Average spend per round has increased 28% over the past five years, climbing at an average rate of $3.25 more per round each year.

WHERE MILLENNIALS PLAY GOLF MOST OFTEN NOW

62% Public
(66% in 2020)

18% Semi-Private
(18% in 2020)

20% Private
(15% in 2020)

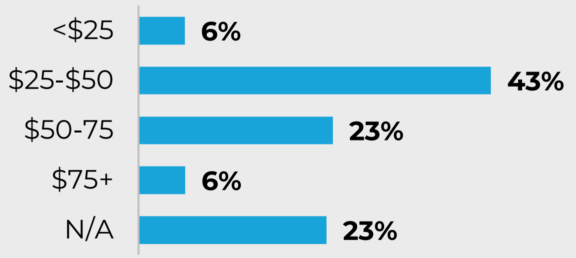
0.1% Off-Course Facilities
(0.4% in 2020)

NORMAL SPEND PER ROUND OF GOLF

$47 Average spend per round
($44 in 2020)

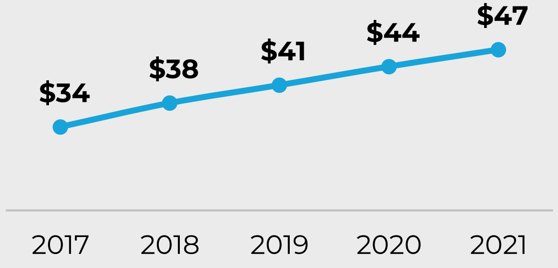
77% Pay for golf by the round
(82% in 2020)

23% Don't pay per round or have membership
(18% in 2020)



Note: N/A used to represent the response "I don't pay for my golf per round (e.g. membership)".

Avg. Spend Per Round Trend



Source: GGA Partners/Nextgengolf Golf Industry Survey 2021.
Note: Averages are weighted. Percentages may not total 100 percent due to rounding.

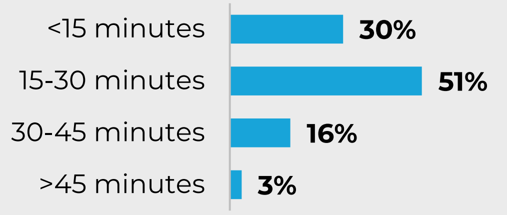
Have Clubs, Will Travel

Millennials mainly play local or nearby courses within a convenient and accessible distance, respondents indicated that it takes them roughly 20 minutes to get to the golf course.

However, they're willing to go the distance to play golf, literally. Respondents say they're ready to dedicate up to a 45 minute drive on average in order to play.

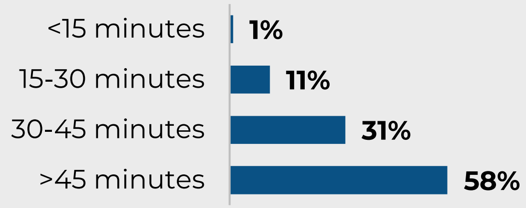
TRANSIT TIME TO GOLF COURSE

21 mins Average transit time
81% 30 mins or less
19% More than 30 mins

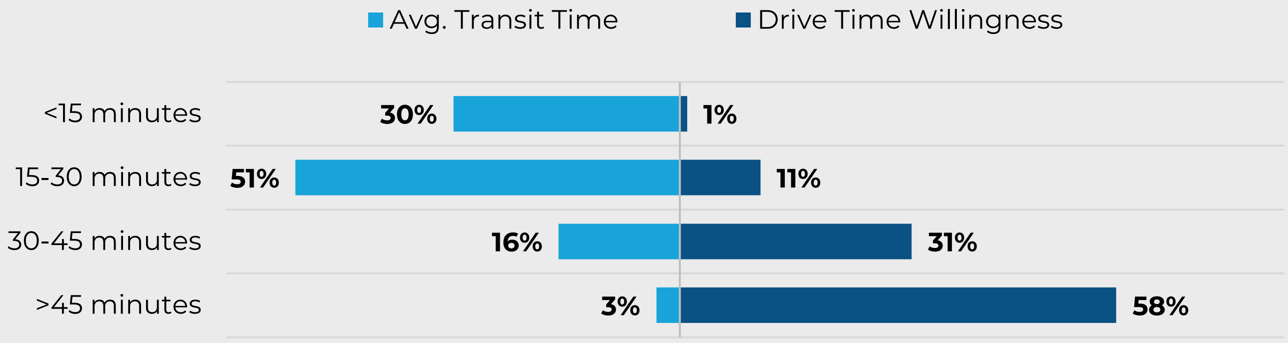


DRIVE TIME WILLINGNESS TO PLAY GOLF

44 mins Average drive time tolerance
12% 30 mins or less
88% More than 30 mins



TIME COMPARISON: TYPICAL TRANSIT vs. WILLINGNESS TO DRIVE



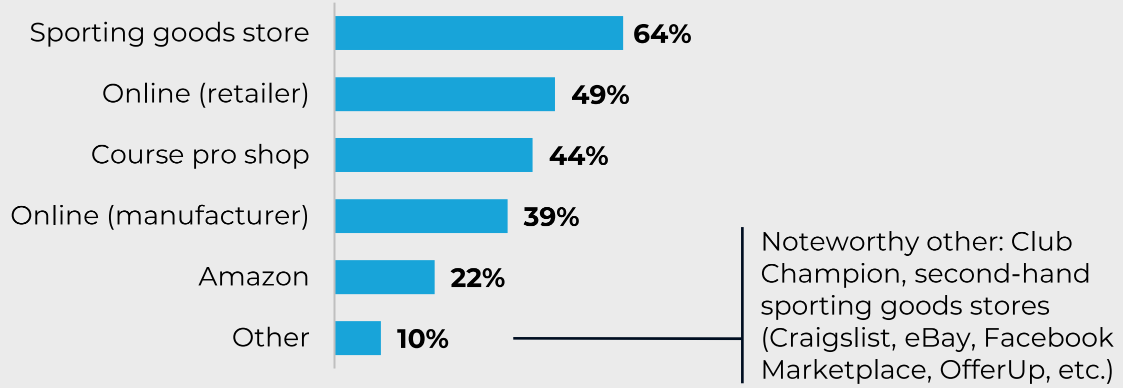
Source: GGA Partners/Nextgengolf Golf Industry Survey 2021.
Note: Averages are weighted. Percentages may not total 100 percent due to rounding.

Golf Retail & Off-Season Activities

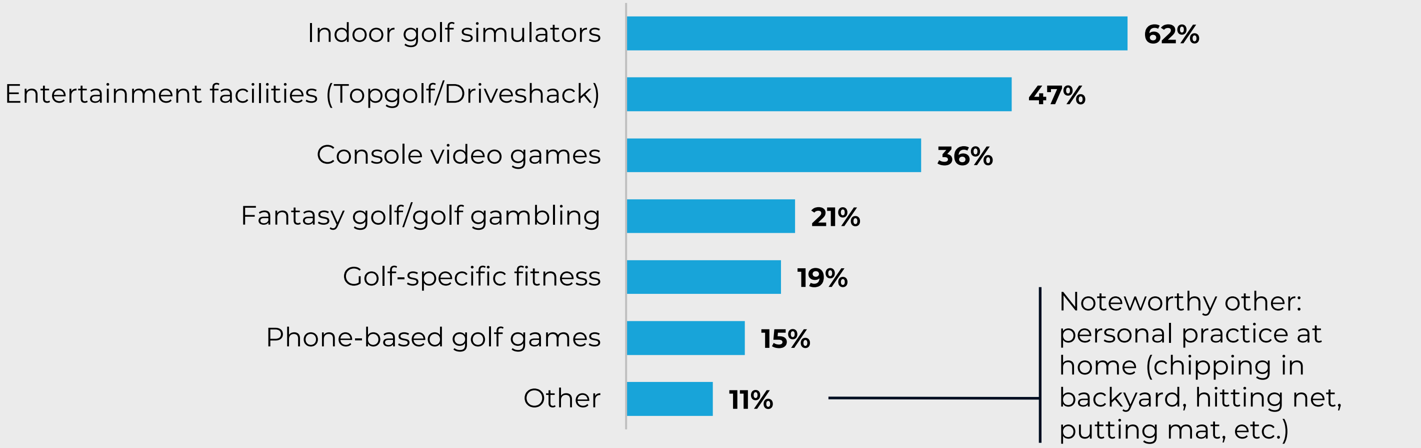
For a generation characterized as digital natives, it may come as a surprise that a substantial portion of millennials purchase golf equipment and apparel in-person, roughly two-thirds at a sporting goods store and almost half at a course pro shop.

Any perceived emphasis on digital may be warranted when considering the golf activities in which they participate during the off-season: indoor simulators remain at the top of the list alongside off-course facilities like Topgolf or Drive Shack.

WHERE MILLENNIALS PURCHASE GOLF EQUIPMENT & APPAREL



PARTICIPATION IN OFF-SEASON GOLF ACTIVITIES



Source: GGA Partners/Nextgengolf Golf Industry Survey 2021.
Note: Percentages do not total 100 percent due to multiple selections.

COVID-19 Pandemic

"...It has been great to see so many people with a rising interest in the game. It makes me happy to know that, with many reports and opinions coming out about the 'dying' sport, golf has reclaimed its position as a premier outdoor sport for all age groups..."

ANONYMOUS

Millennial Golfer & Survey Respondent

Pandemic Has Increased the Importance of Golf to Millennials

Golf has become more important to millennial golfers as a result of the coronavirus pandemic according to 60% of sample – 25% significantly so.

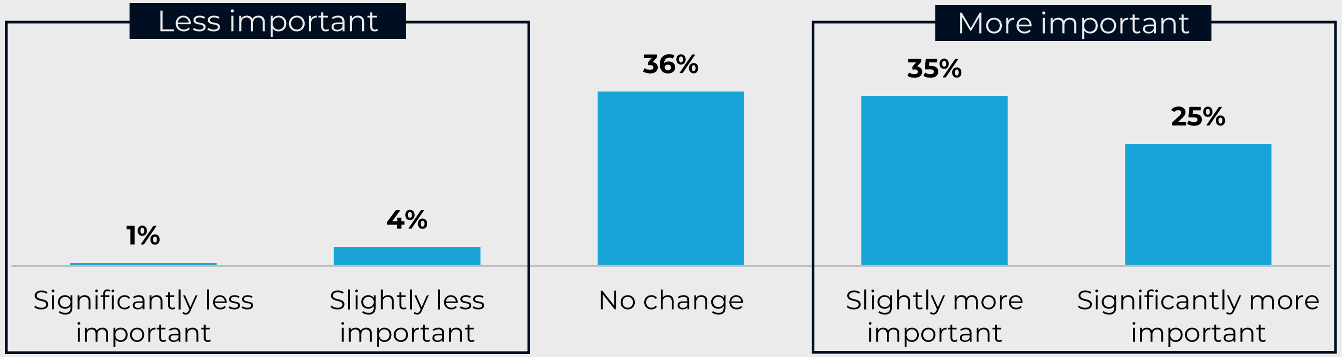
Prior to the pandemic, they participated in an average of 3.3 sports or recreational activities. Due to health and safety restrictions, there have been fewer alternatives to golf and many fringe players have begun playing more while new players have picked up the game too.

COVID-19 IMPACT ON IMPORTANCE OF GOLF IN MILLENNIAL LIVES

60% Golf has become more important

36% No change

5% Golf has become less important

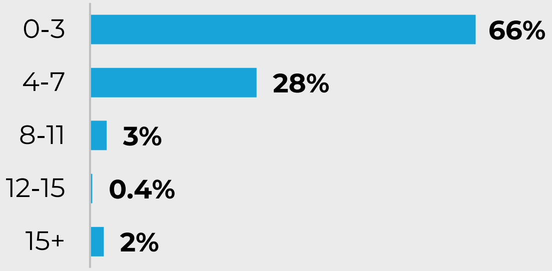


NUMBER OF SPORTS/RECREATIONAL ACTIVITIES PRE-PANDEMIC

3.3 Average number of sports or recreational activities prior to COVID-19 pandemic

66% 3 activities or less

34% 4 activities or more



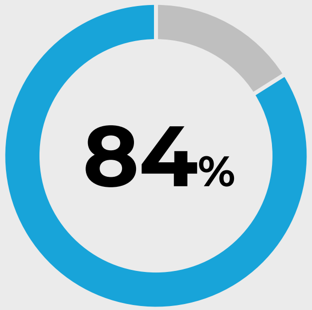
Source: GGA Partners/Nextgengolf Golf Industry Survey 2021.
Note: Averages are weighted. Percentages may not total 100 percent due to rounding.

Work-From-Home Flexibility Allows Millennials to Play More Golf

Work environment shifts toward greater flexibility may afford more leisure time which can impact golf participation in new and challenging ways.

Most millennials have experienced increased work flexibility (84% can work-from-home) which has been favorable for allowing them to get on the course more frequently. Half say work-from-home allows them to play more golf, 18% significantly more.

WORK-FROM-HOME IMPACT ON ABILITY TO PLAY GOLF

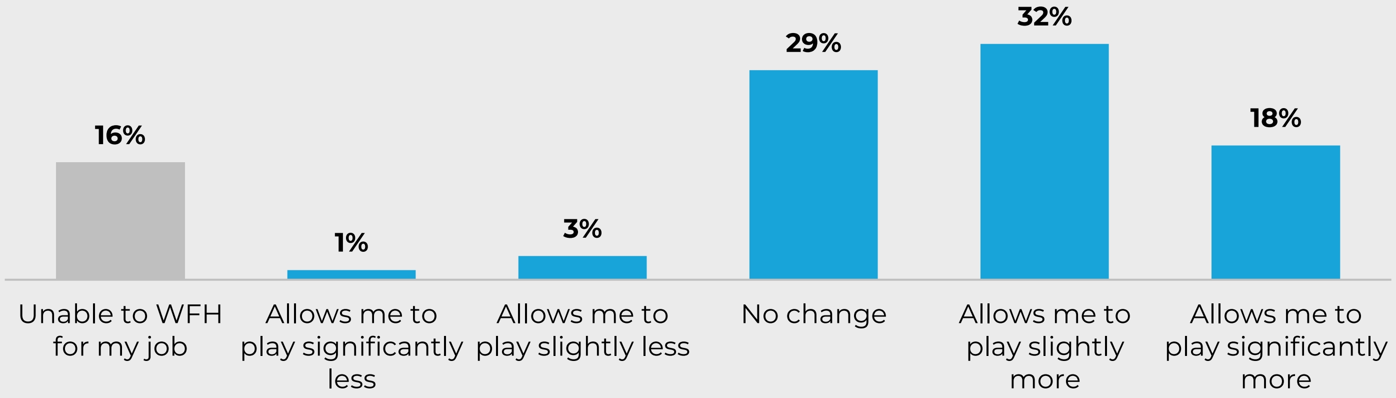


are permitted to work from home

51% WFH allows more golf
18% significantly more

29% No change

5% WFH allows less golf



Source: GGA Partners/Nextgengolf Golf Industry Survey 2021.
Note: Percentages may not total 100 percent due to rounding.

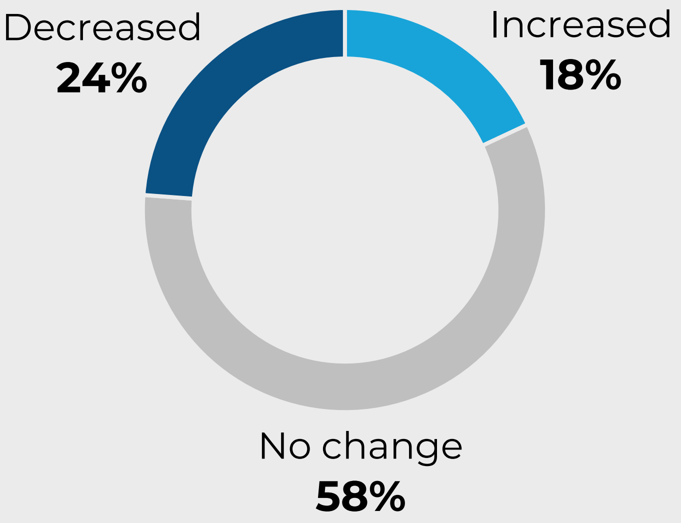
Pandemic Has Not Jeopardized Disposable Income for Most Millennials

Millennial golfers in the sample have an average household income of $95,933 and most did not see a change in disposable income since the coronavirus pandemic began.

Three-quarters say that their disposable income has either increased or remained the same.

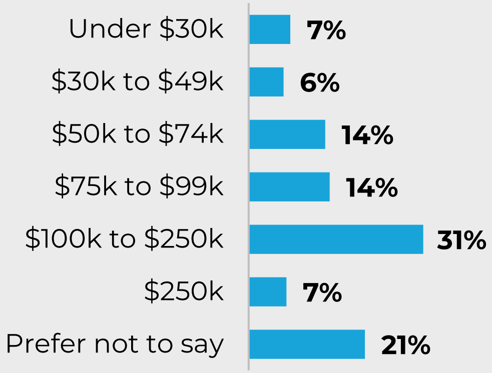
CHANGE IN DISPOSABLE INCOME SINCE START OF PANDEMIC

76% Increased or remained the same
58% No change
18% Increased
24% Decreased



APPROXIMATE HOUSEHOLD INCOME DISTRIBUTION

$96k Average HHI
42% Under $100k
38% Over $100k



Source: GGA Partners/Nextgengolf Golf Industry Survey 2021.
Note: Percentages may not total 100 percent due to rounding.

Private Clubs

"Foster a more relaxed vibe. Courses tend to have an air of elitism, especially private. Attracting more younger folks to private courses is going to be important as the current membership ages.

The courses that are ahead of the curve on that aspect will have a significant advantage."

MIKE

Millennial Golfer & Survey Respondent

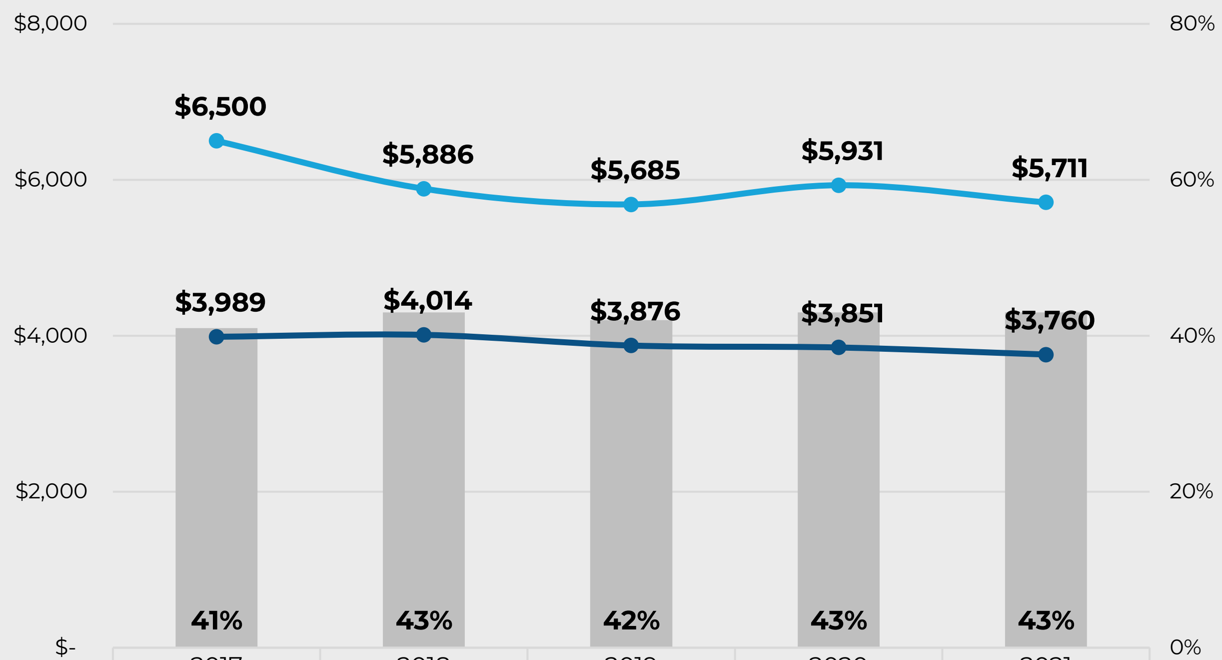
Cost Thresholds for Private Club Joining Fees Remain Steady

Millennial tolerance to pay fees required to join and belong to a private club have remained highly consistent across each of the five annual surveys.

Roughly **42% would prefer to pay more annually** rather than an entrance fee and average cost thresholds for **entrance fees and annual dues hold steady** over time.

Since 2017, average spend per golf round has increased each year yet tolerance for annual dues has decreased overall.

AVERAGE COST MILLENNIALS WILLING TO PAY FOR PRIVATE CLUB ENTRANCE FEE & ANNUAL DUES – YOY COMPARISON



	2017	2018	2019	2020	2021
Pay More Annually	41%	43%	42%	43%	43%
Entrance Fee	$6,500	$5,886	$5,685	$5,931	$5,711
Annual Dues	$3,989	$4,014	$3,876	$3,851	$3,760

Source: GGA Partners/Nextgengolf Golf Industry Survey 2016-2021.
Note: "Pay More Annually" represents the percentage of respondents who indicated their preference to pay more annually rather than pay an entrance fee to join a private club. Listed prices reflect weighted averages.

Fee Tolerance Levels to Join & Belong to a Private Club

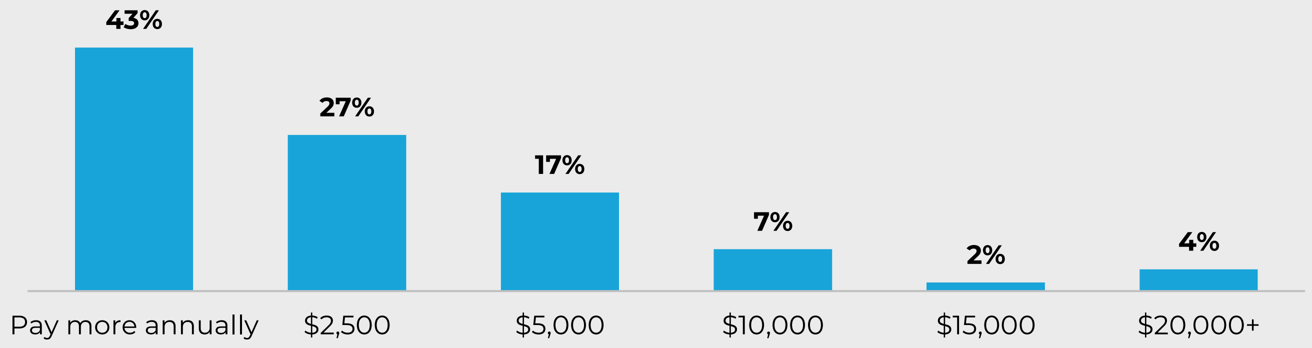
The 2021 findings are virtually unchanged from prior research installments:

43% Prefer to pay more annually rather than an entrance fee

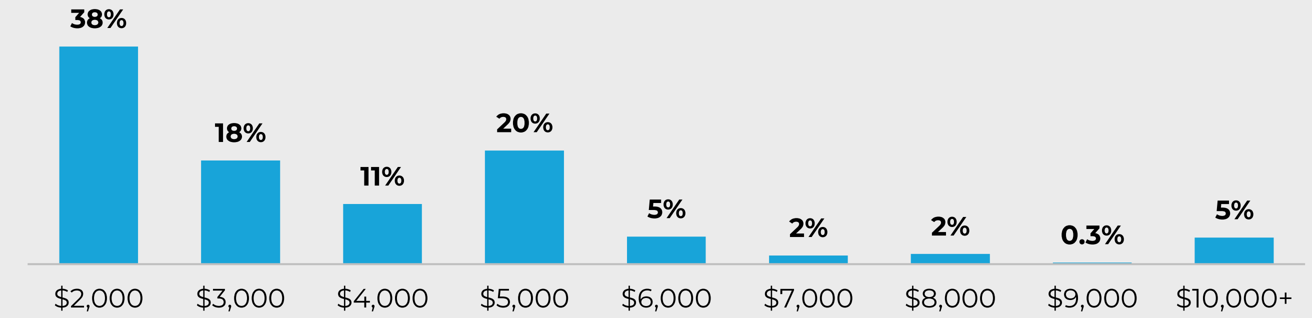
$5,711 Average entrance fee tolerance (excl. pay more annually)

$3,760 Average annual dues tolerance

ENTRANCE FEE TOLERANCE TO JOIN A PRIVATE CLUB – 2021



ANNUAL DUES TOLERANCE TO BELONG TO A PRIVATE CLUB – 2021



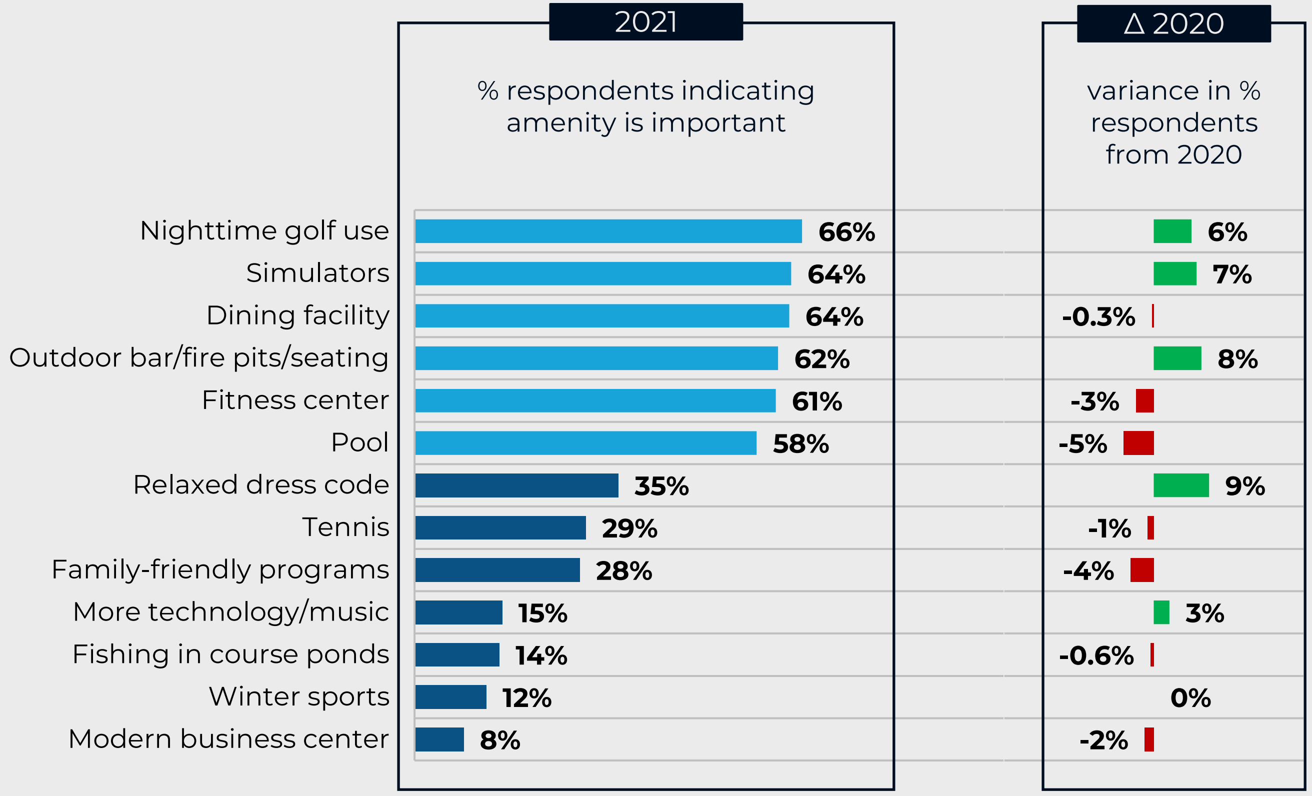
Source: GGA Partners/Nextgengolf Golf Industry Survey 2021.
Note: Listed prices reflect weighted averages. Percentages may not total 100 percent due to rounding.

Amenities & Socialization are Important When Considering a Private Club

A facility package that includes non-golf amenities and social components remains important in millennial considerations for joining a private club.

Interest is highest in amenities offering two key attributes: **1) non-traditional golf play** like night golf and simulators, **2) a multi-use club experience** with casual dining, socialization, and fitness. Interest in pool and family-friendly/youth programs diminished 4-5% in 2021.

IMPORTANT NON-GOLF AMENITIES & SOCIAL COMPONENTS FOR JOINING A PRIVATE CLUB – 2021 vs. 2020

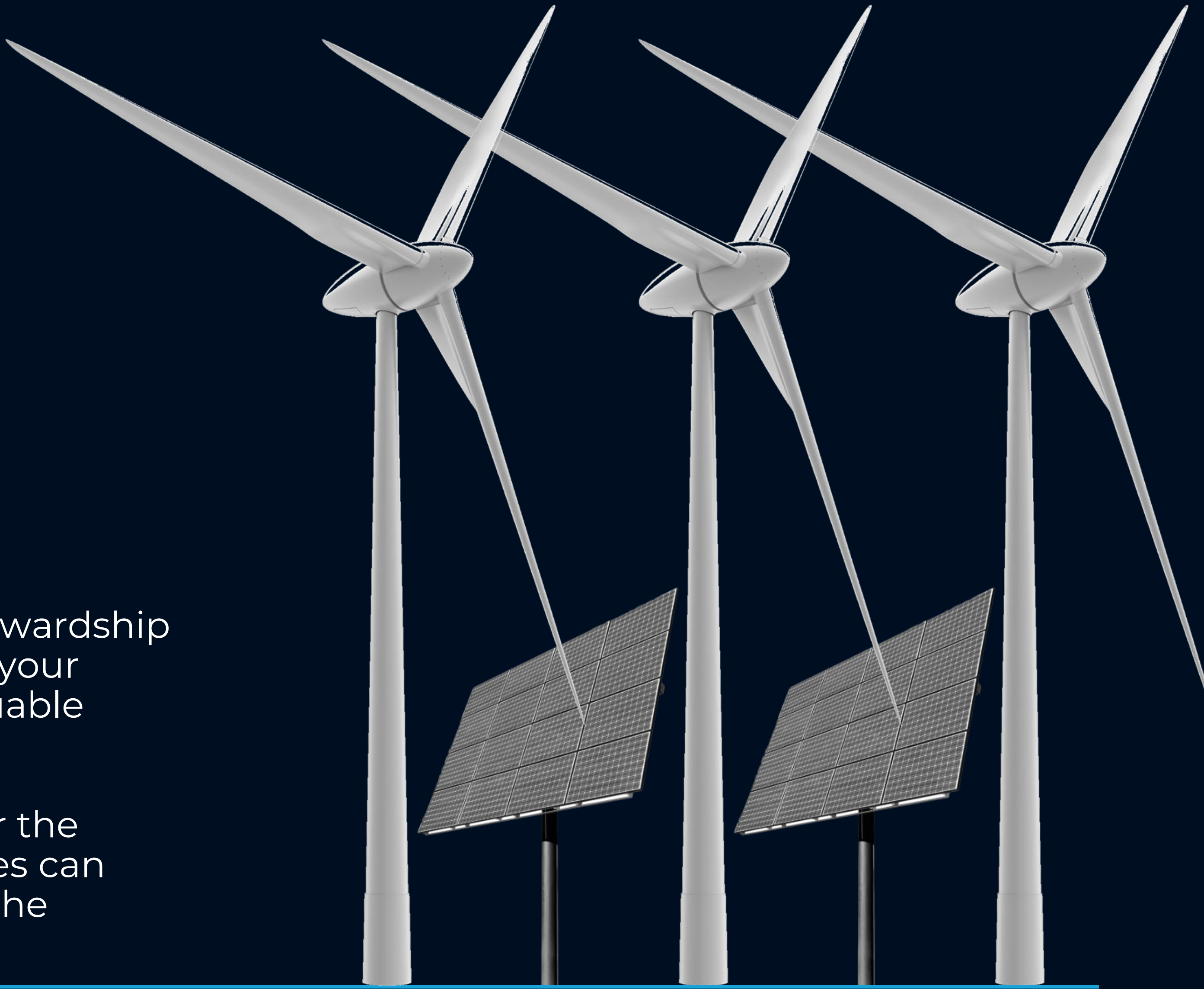


Source: GGA Partners/Nextgengolf Golf Industry Survey 2021 & 2020.
Note: "Δ 2020" represents the change in the percentage of respondents who selected an amenity or social component in the 2021 survey relative to the percentage of respondents who selected the same in the 2020 survey. 2021 n=1,486, 2020 n=1,618. Percentages do not total 100 percent due to multiple choices.

Social & Environmental Behaviors

“Establishing a reputation for environmental stewardship in the public eye – that is, from the viewpoint of your current and potential future members – is a valuable business marketing tool for clubs to wield.

Pursuing formal recognition and certification for the club's commitment to ‘green’ operating practices can grow its market share and build loyalty among the power-spending generations of the future.”



HENRY DELOZIER
Partner, GGA Partners

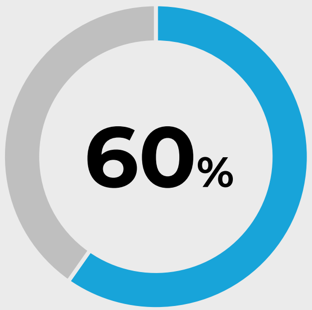
Social & Environmental Behaviors of Golf Venues Matter to Millennials

The social and environmental behavior of a golf venue is noticed and preferred by millennial golfers.

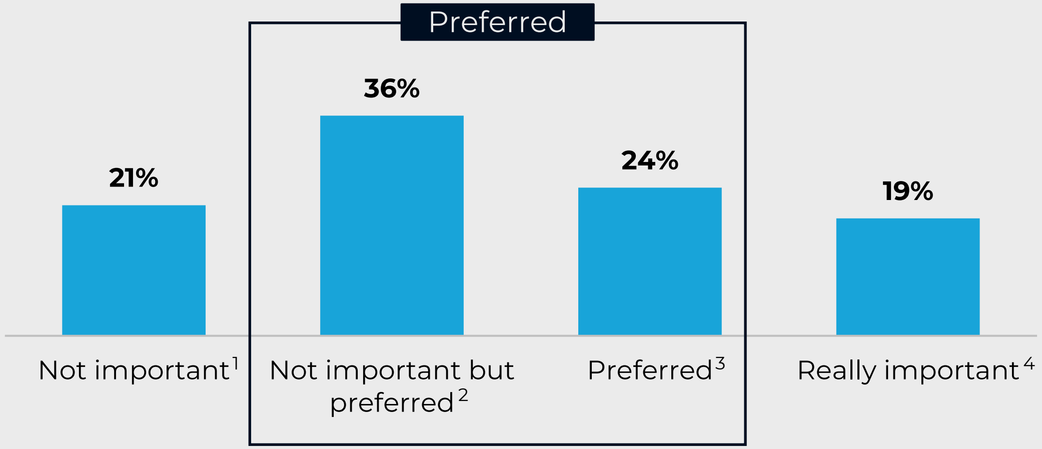
60% prefer golf venues which actively exhibit these values and 19% consider social and environmental positions to be really important them.

Only one out of five say these behaviors are not important.

HOW MUCH ATTENTION MILLENNIALS PAY TO SOCIAL & ENVIRONMENTAL BEHAVIOR OF GOLF VENUE THEY FREQUENT



prefer golf venues which demonstrate environmental & social responsibility or have been publicly recognized as such



[1] Represents response “It is not important to me”.
[2] Represents response “It’s not important to me but I prefer clubs that demonstrate environmental and social responsibility“.
[3] Represents response “I prefer clubs which I recognize as responsible e.g. environmental certification, social/community campaigns”.
[4] Represents response “It is really important to me and I pay attention to a club’s social and environmental performance“.

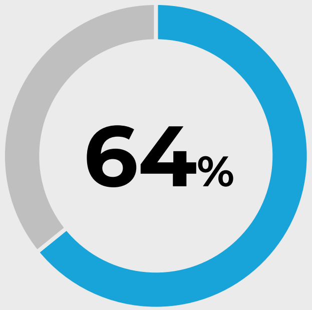
Source: GGA Partners/Nextgengolf Golf Industry Survey 2021.
Note: Percentages may not total 100 percent due to rounding.

Social & Environmental Behaviors of Venues Influence Likelihood of Purchase

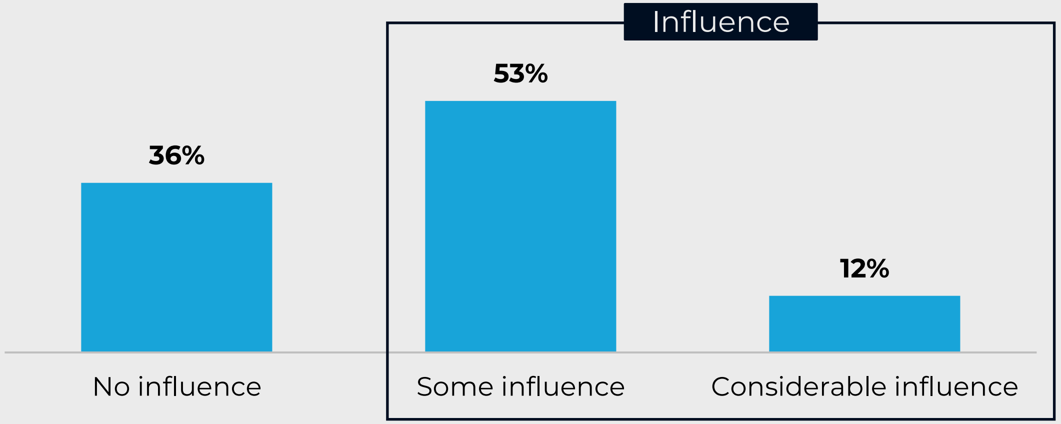
Nearly two-thirds of millennial golfers report that a golf venue's social and environmental behavior would influence their likelihood of a purchase.

12% say the influence would be considerable.

INFLUENCE OF SOCIAL & ENVIRONMENTAL BEHAVIOR ON MILLENNIAL LIKELIHOOD OF PURCHASE



say the social and environmental behavior of a golf venue would influence their likelihood of purchase



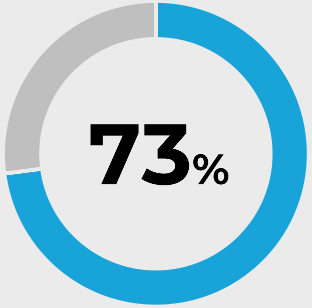
Source: GGA Partners/Nextgengolf Golf Industry Survey 2021.
Note: Percentages may not total 100 percent due to rounding.

Millennials Willing to Reward Social & Environmental Behaviors with Their Wallets

If social and environmental practices increased the costs of a golf venue, three-quarters of millennials are willing to pay more – 7.1% more, on average.

While the social/environmental behavior of a golf venue is not currently a make-or-break proposition for millennial golfers, upside potential exists for facilities willing and able to make that investment.

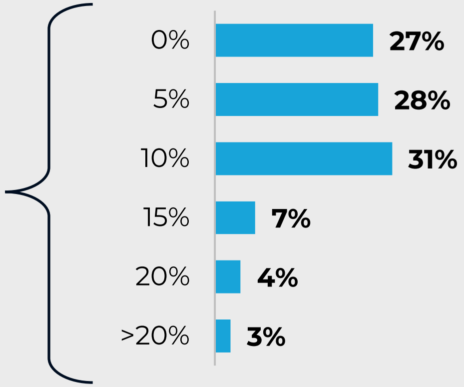
WILLINGNESS TO PAY MORE FOR EXCELLENT SOCIAL & ENVIRONMENTAL PRACTICES EXHIBITED BY GOLF VENUE



would be willing to pay more if excellent social & environmental practices increased golf venue costs

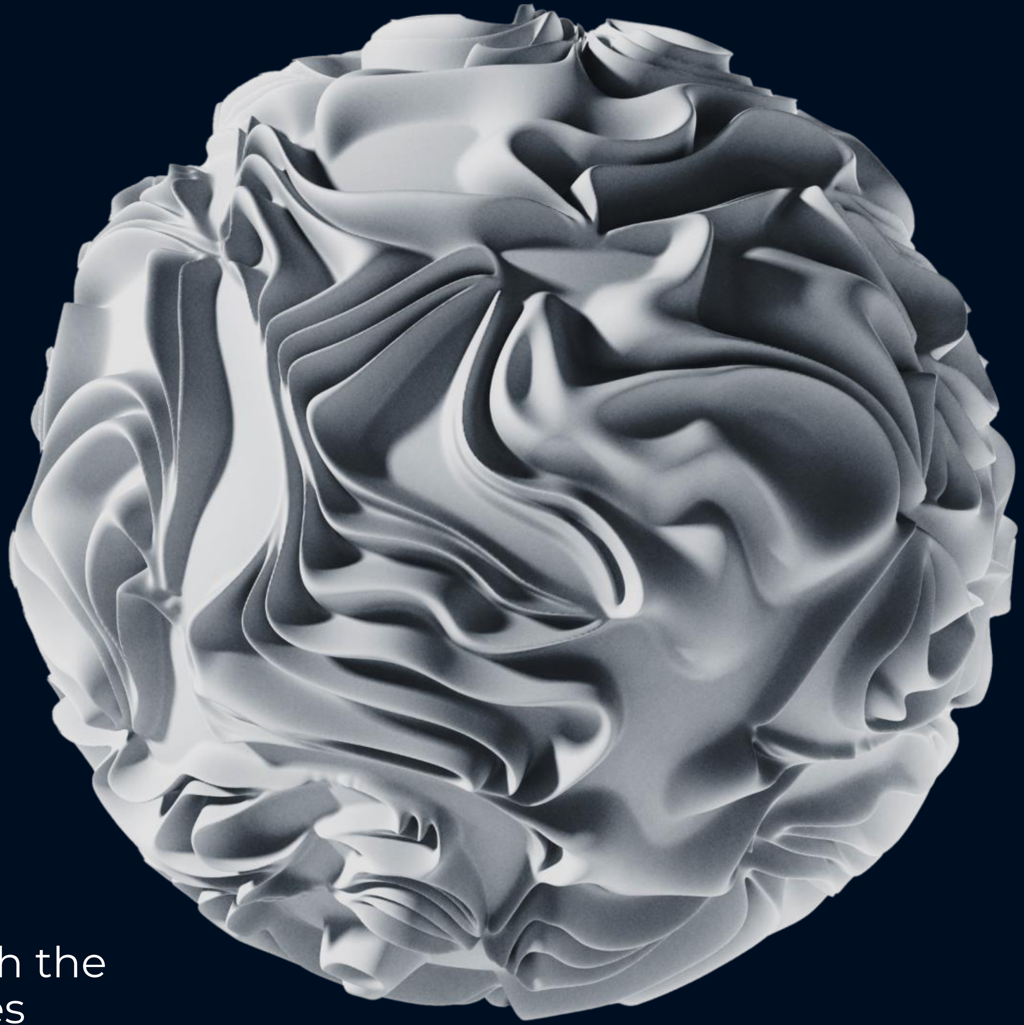
7.1% MORE

average additional amount millennials would be willing to pay



Source: GGA Partners/Nextgengolf Golf Industry Survey 2021.
Note: Averages are weighted. Percentages may not total 100 percent due to rounding.

Thought Starters



"To succeed in attracting the next generation of members, golf facilities and private clubs must build their reputations around diversity, inclusiveness, and environmental stewardship.

The best performing facilities will provide an amenity and activity profile designed to create experiences which enrich the emotional connection and sense of belonging that elevates the value proposition most appealing to young golfers."

MICHAEL GREGORY

Partner, GGA Partners

Thought Starters

Technology

Millennials are a very tech-savvy generation.

Are you maintaining traditional and simple avenues for payment, communications, bookings, and account management?

Are you offering tech-savvy members the opportunity to interact in a friendly and elegant digital environment?

Casual Spaces

The desire for more casual, relaxed spaces in private clubs is one not only of millennials, but of many in other generations.

Is your club developing a capital and facilities plan to adapt to the changing needs of members and prospects to have more casual settings?

Unique Experiences

Millennials desire unique experiences that enrich their lifestyles.

Is your team focused on creating new, different events and activities that appeal to younger members?

Do you have a plan to provide child care for young families that allow parents to participate?

Annual Fees

Over the past five years, millennials have consistently expressed a willingness to pay higher annual dues in lieu of a larger joining fee.

Is your club examining its membership categories and fee structures to determine how to be most effective in accommodating the joining threshold?

Stewardship

An important trait of the millennial generation is their concern for social and environmental practices.

Is your club developing events, activities, and plans that are inclusive, diverse, and focused on community and stewardship?

"Increased accessibility – participation in First Tee programs, striving to be affordable, encouraging under-represented groups to golf, less elitist. Golf would benefit from all courses pushing for greater access to the game and designing uniform programs to do so.

Would also be fun to leverage technology better – ranges should have TrackMan tech, technology in golf balls, you should be able to have a playing partner from across the country to play in a combined score tournament set at different courses, etc.

I guess what I'm really saying is that we need more innovation and creative thinking about the how/who of golf. And we need to reincarnate Donald Ross because, damnit, George Wright is a GEM."

ANDREW

Millennial Golfer & Survey Respondent

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Nextgengolf, a subsidiary of the PGA of America, has the mission to provide golfing opportunities for golfers of all ages and make the game of golf more relevant for high school students, college students, and adults. Through the NHSGA, NCCGA and City Tour products, Nextgengolf caters to golfers over 15 years old by proactively keeping golfers engaged through events and bringing new players into the game.

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