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.
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.
“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
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 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 that the average price for a public golf round (including resorts) is $36.

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 simulated 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.

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.

**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.
Contents

01 Research Overview
02 Executive Summary
03 Key Insights
04 Thought Starters
“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

<table>
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<tr>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>29.2 yrs</td>
<td>Average age</td>
</tr>
<tr>
<td>73%</td>
<td>Under age 35</td>
</tr>
<tr>
<td>27%</td>
<td>Over age 35</td>
</tr>
</tbody>
</table>

## GENDER

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>93%</td>
<td>Male</td>
</tr>
<tr>
<td>7%</td>
<td>Female</td>
</tr>
<tr>
<td>0.1%</td>
<td>Undisclosed</td>
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</tbody>
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## RACE/ETHNICITY

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<thead>
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<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>84%</td>
<td>Caucasian/White</td>
</tr>
<tr>
<td>5%</td>
<td>Undisclosed</td>
</tr>
<tr>
<td>5%</td>
<td>Asian/Pacific Islander</td>
</tr>
<tr>
<td>3%</td>
<td>Hispanic/Latino</td>
</tr>
<tr>
<td>2%</td>
<td>African American/Black</td>
</tr>
<tr>
<td>1.5%</td>
<td>Other</td>
</tr>
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</table>

## OCCUPATION

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>70%</td>
<td>Employed</td>
</tr>
<tr>
<td></td>
<td>(60% in 2020)</td>
</tr>
<tr>
<td>26%</td>
<td>Student</td>
</tr>
<tr>
<td></td>
<td>(37% in 2020)</td>
</tr>
<tr>
<td>4%</td>
<td>Retired</td>
</tr>
<tr>
<td></td>
<td>(3% in 2020)</td>
</tr>
</tbody>
</table>

## HAVE CHILDREN

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>26%</td>
<td>Have children</td>
</tr>
<tr>
<td>(23% in 2020)</td>
<td></td>
</tr>
<tr>
<td>74%</td>
<td>No children</td>
</tr>
<tr>
<td>(77% in 2020)</td>
<td></td>
</tr>
</tbody>
</table>

## HOUSEHOLD INCOME

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>$96k</td>
<td>Average HHI</td>
</tr>
<tr>
<td>($90k in 2020)</td>
<td>($78k in 2019)</td>
</tr>
<tr>
<td>38%</td>
<td>Over $100k</td>
</tr>
<tr>
<td>(35% in 2020)</td>
<td>(29% in 2019)</td>
</tr>
</tbody>
</table>

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.

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.

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
  - <15 minutes: 30%
  - 15-30 minutes: 51%
  - 30-45 minutes: 16%
  - >45 minutes: 3%

- **81%** 30 mins or less
- **19%** More than 30 mins

**DRIVE TIME WILLINGNESS TO PLAY GOLF**

- **44 mins** Average drive time tolerance
  - <15 minutes: 1%
  - 15-30 minutes: 11%
  - 30-45 minutes: 31%
  - >45 minutes: 58%

- **12%** 30 mins or less
- **88%** More than 30 mins

**TIME COMPARISON: TYPICAL TRANSIT vs. WILLINGNESS TO DRIVE**

<table>
<thead>
<tr>
<th>Drive Time Willingness</th>
<th>Avg. Transit Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;15 minutes</td>
<td>30%</td>
</tr>
<tr>
<td>15-30 minutes</td>
<td>51%</td>
</tr>
<tr>
<td>30-45 minutes</td>
<td>16%</td>
</tr>
<tr>
<td>&gt;45 minutes</td>
<td>3%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Where Purchased</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sporting goods store</td>
<td>64%</td>
</tr>
<tr>
<td>Online (retailer)</td>
<td>49%</td>
</tr>
<tr>
<td>Course pro shop</td>
<td>44%</td>
</tr>
<tr>
<td>Online (manufacturer)</td>
<td>39%</td>
</tr>
<tr>
<td>Amazon</td>
<td>22%</td>
</tr>
<tr>
<td>Other</td>
<td>10%</td>
</tr>
</tbody>
</table>

Note: Percentages do not total 100 percent due to multiple selections.

PARTICIPATION IN OFF-SEASON GOLF ACTIVITIES

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indoor golf simulators</td>
<td>62%</td>
</tr>
<tr>
<td>Entertainment facilities (Topgolf/Driveshack)</td>
<td>47%</td>
</tr>
<tr>
<td>Console video games</td>
<td>36%</td>
</tr>
<tr>
<td>Fantasy golf/golf gambling</td>
<td>21%</td>
</tr>
<tr>
<td>Golf-specific fitness</td>
<td>19%</td>
</tr>
<tr>
<td>Phone-based golf games</td>
<td>15%</td>
</tr>
<tr>
<td>Other</td>
<td>11%</td>
</tr>
</tbody>
</table>

Note: Percentages do not total 100 percent due to multiple selections.

Note: Percentages do not total 100 percent due to multiple selections.

Noteworthy other: Club Champion, second-hand sporting goods stores (Craigslist, eBay, Facebook Marketplace, OfferUp, etc.)

Noteworthy other: personal practice at home (chipping in backyard, hitting net, putting mat, etc.)
ANONYMOUS
Millennial Golfer & Survey Respondent

“…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…”
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

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

<table>
<thead>
<tr>
<th>Impact on Ability to Play Golf</th>
<th>Permit to Work from Home</th>
</tr>
</thead>
<tbody>
<tr>
<td>WFH allows more golf</td>
<td>51%</td>
</tr>
<tr>
<td>18% significantly more</td>
<td></td>
</tr>
<tr>
<td>No change</td>
<td>29%</td>
</tr>
<tr>
<td>WFH allows less golf</td>
<td>5%</td>
</tr>
</tbody>
</table>

- 16% Unable to WFH for my job
- 1% Allows me to play significantly less
- 3% Allows me to play slightly less
- 29% No change
- 32% Allows me to play slightly more
- 18% Allows me to play significantly more

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.

<table>
<thead>
<tr>
<th>Change in Disposable Income Since Start of Pandemic</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increased or remained the same</td>
<td>76%</td>
</tr>
<tr>
<td>No change</td>
<td>58%</td>
</tr>
<tr>
<td>Increased</td>
<td>18%</td>
</tr>
<tr>
<td>Decreased</td>
<td>24%</td>
</tr>
</tbody>
</table>

Note: Percentages may not total 100 percent due to rounding.
“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

<table>
<thead>
<tr>
<th>Year</th>
<th>Pay More Annually</th>
<th>Entrance Fee</th>
<th>Annual Dues</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>41%</td>
<td>$6,500</td>
<td>$3,989</td>
</tr>
<tr>
<td>2018</td>
<td>43%</td>
<td>$5,886</td>
<td>$4,014</td>
</tr>
<tr>
<td>2019</td>
<td>42%</td>
<td>$5,685</td>
<td>$3,876</td>
</tr>
<tr>
<td>2020</td>
<td>43%</td>
<td>$5,931</td>
<td>$3,851</td>
</tr>
<tr>
<td>2021</td>
<td>43%</td>
<td>$5,711</td>
<td>$3,760</td>
</tr>
</tbody>
</table>


**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


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**

<table>
<thead>
<tr>
<th>Amenity</th>
<th>% Respondents Indicating Amenity is Important</th>
<th>Variance in % Respondents from 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nighttime golf use</td>
<td>66%</td>
<td>6%</td>
</tr>
<tr>
<td>Simulators</td>
<td>64%</td>
<td>7%</td>
</tr>
<tr>
<td>Dining facility</td>
<td>64%</td>
<td>-0.3%</td>
</tr>
<tr>
<td>Outdoor bar/fire pits/seating</td>
<td>62%</td>
<td>8%</td>
</tr>
<tr>
<td>Fitness center</td>
<td>61%</td>
<td>-3%</td>
</tr>
<tr>
<td>Pool</td>
<td>58%</td>
<td>-5%</td>
</tr>
<tr>
<td>Relaxed dress code</td>
<td>35%</td>
<td>9%</td>
</tr>
<tr>
<td>Tennis</td>
<td>29%</td>
<td>-1%</td>
</tr>
<tr>
<td>Family-friendly programs</td>
<td>28%</td>
<td>-4%</td>
</tr>
<tr>
<td>More technology/music</td>
<td>15%</td>
<td>3%</td>
</tr>
<tr>
<td>Fishing in course ponds</td>
<td>14%</td>
<td>-0.6%</td>
</tr>
<tr>
<td>Winter sports</td>
<td>12%</td>
<td>0%</td>
</tr>
<tr>
<td>Modern business center</td>
<td>8%</td>
<td>-2%</td>
</tr>
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</table>

Note: “∆ 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

- **60%** prefer golf venues which demonstrate environmental & social responsibility or have been publicly recognized as such.
- **21%** prefer golf venues which I recognize as responsible e.g. environmental certification, social/community campaigns.
- **24%** it is really important to me and I pay attention to a club’s social and environmental performance.
- **19%** it is not important to me.

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”.

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.

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

73% 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

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
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?

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?

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?

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?

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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