

**NGF** MEMBER RESOURCES  
NATIONAL GOLF FOUNDATION

# GOLF PARTICIPATION IN THE UNITED STATES



2015 EDITION

Published by National Golf Foundation  
1150 South U.S. Highway One • Jupiter, FL 33477  
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## TABLE OF CONTENTS

Introduction.....	1
Methodology.....	2
All U.S. Golfers .....	3
Core Golfers .....	4
Occasional Golfers .....	5
Junior Golfers .....	6
Beginning Golfers.....	7
Rounds Played .....	8
Regional Profiles.....	9
Latent Demand (interested non-golfers).....	10



## INTRODUCTION

### **Participation Remains Steady; Utilization, Interest Rise**

Golf participation in 2014 remained equal to the previous 12 months, marking the fourth consecutive year that roughly 25 million people played at least one round of golf. Participation appears to have found its post-recession footing, while positive signs with respect to utilization and interest in playing among non-golfers, show that golf remains attractive and aspirational to multiple segments of the population.

### **Utilization on the Rise**

While participation has remained relatively flat the past several years, golfers are playing more rounds when weather permits. Rounds per playable day increased by nearly 1% compared to 2013, according to PGA PerformanceTrak. This marks the fifth consecutive year of positive growth in utilization on days open, demonstrating that golf demand is healthy when Mother Nature allows.

The average number of rounds played per golfer continued to increase in 2014. Golfers played slightly more than 18 rounds on average last year, adding more than one round per golfer compared to 2005, when participation was higher. The loss of less-frequent players contributed to the increase in the average, but the sport has benefited from increased activity among its committed (core) golfers who are playing two more rounds on average per year than they did in 2005.

### **Interest in Golf Remains High**

While activity among current golfers is slightly up, the number of first-time players being introduced to the sport has remained steady over the past three years. Roughly half of the 4 million players that entered the game last year were beginners, which is above the historic average of newcomers to the game. The growth in beginner activity demonstrates that golf remains attractive to those who have never played before.

Another indicator of interest in the game is latent demand (number of non-golfers who are very or somewhat interested in playing the game now). Each year, NGF measures this group by asking people who reported no on-course golfing activity in the previous year how interested they currently are in playing golf. More than 32 million non-golfers (a mix of both former players and those who have never played before) are interested in playing now—well more than one prospective golfer for every existing one. Latent demand has grown steadily since 2011, when there were closer to 27 million interested but inactive prospects.



## METHODOLOGY

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

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

The Council currently surveys 40,000 Americans ages 6 and above every year regarding their participation in over 100 sports and fitness activities, including golf. Although the resulting sample closely matches that of the entire U.S. population demographically, a statistical weighting on key Census variables (including age, income, geographic region, etc.) is applied in order to make the sample match the population as accurately as possible.

8.5% of the sample indicated that they played golf at least once in 2014. Those golfers we identify enable us to take an in-depth look at golfer characteristics by age, income, education, etc., and to track the trend in the number of golfers by segment over time.

All statistical samples are subject to a margin of error. The margin of error on the total number of golfers in 2014 (24.7 million) was plus-or-minus 875,000 golfers.

### Definition of Terms Used in this Report

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

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

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

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

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

**Latent Demand:** Individuals ages 6 and above who did not play golf during the survey year but expressed interest in playing golf now.

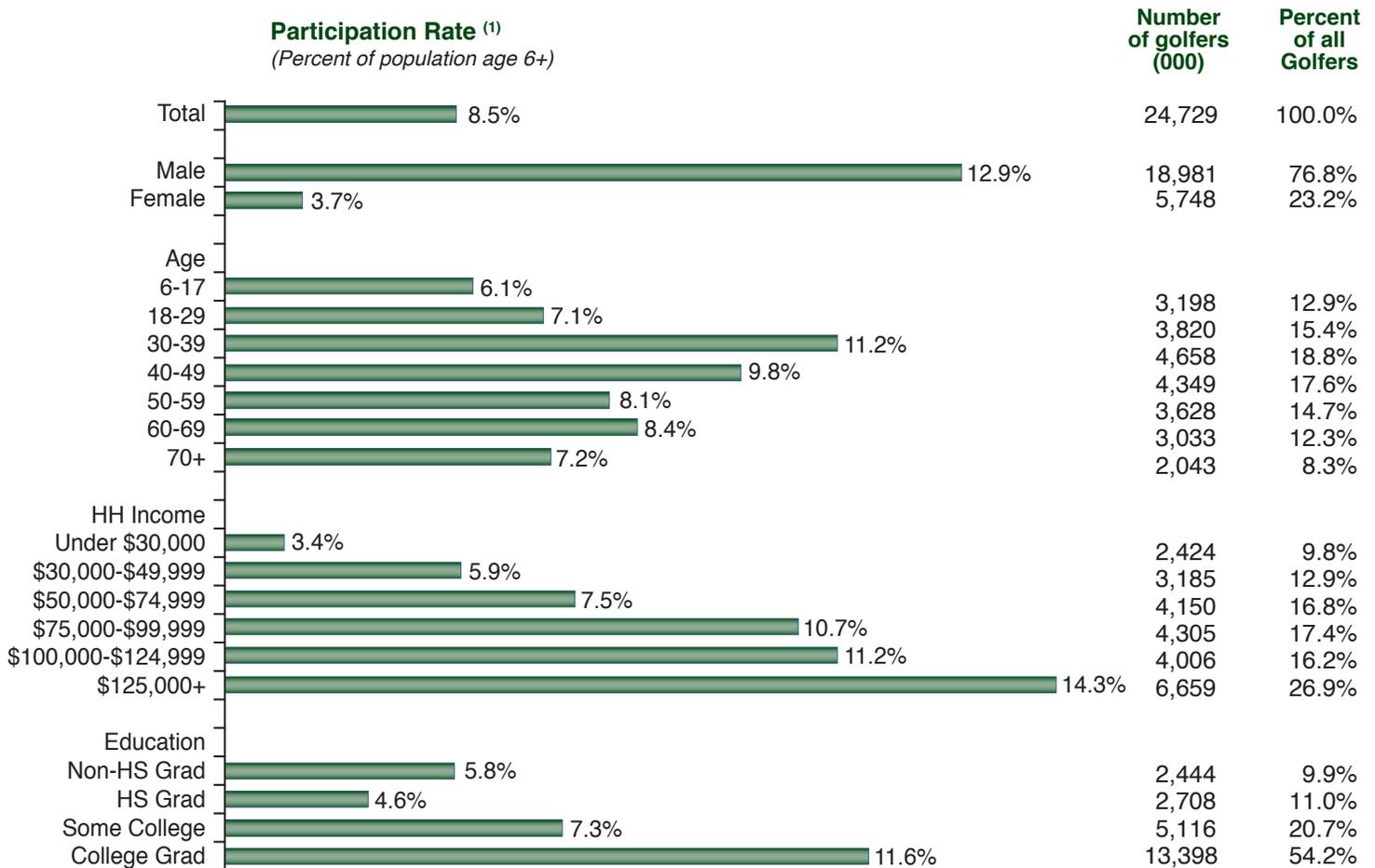


## ALL U.S. GOLFERS

Number	1985	1990*	1995	2000	2005	2010	2013	2014
All golfers age 6+ (in millions)	19.5	24.2	24.7	28.8	30.0	26.1	24.7	24.7

\* Average of 1989 and 1991

Averages	Male	Female	Total
All golfers age 6+			
Age	41.8	37.4	40.8
HH Income	\$93,000	\$93,000	\$93,000
Annual Rounds	19.0	16.7	18.5



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

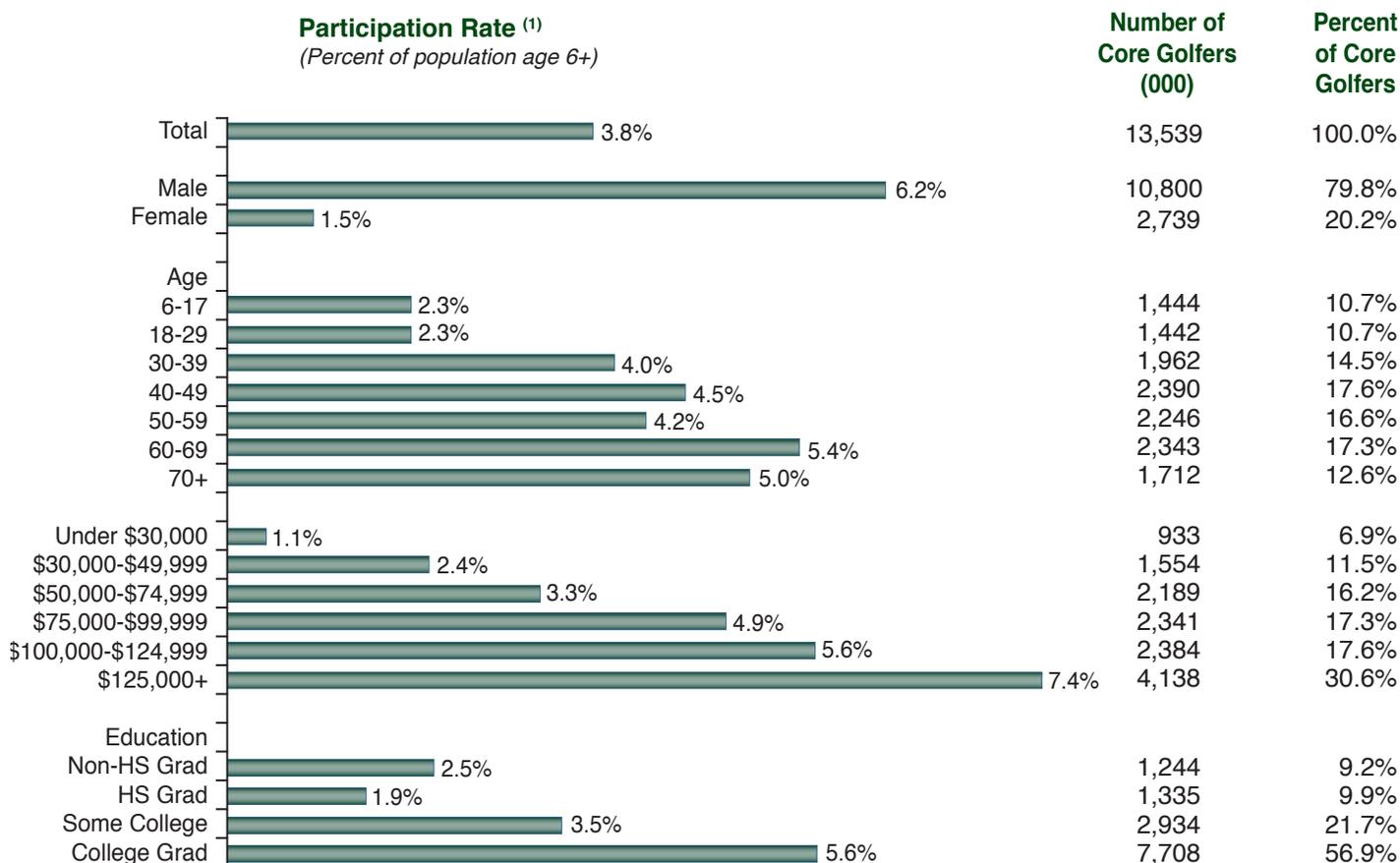


## CORE GOLFERS

Number	1985	1990*	1995	2000	2005	2010	2013	2014
All golfers age 6+ (in millions)	13.4	15.9	16.4	19.7	18.0	14.8	13.6	13.5

\* Average of 1989 and 1991

Averages	Male	Female	Total
All golfers age 6+			
Age	47.4	41.0	46.1
HH Income	\$98,300	\$96,700	\$97,900
Annual Rounds	31.4	32.3	31.6



(1) Percentage of the given population or demographic segment who are Core Golfers.

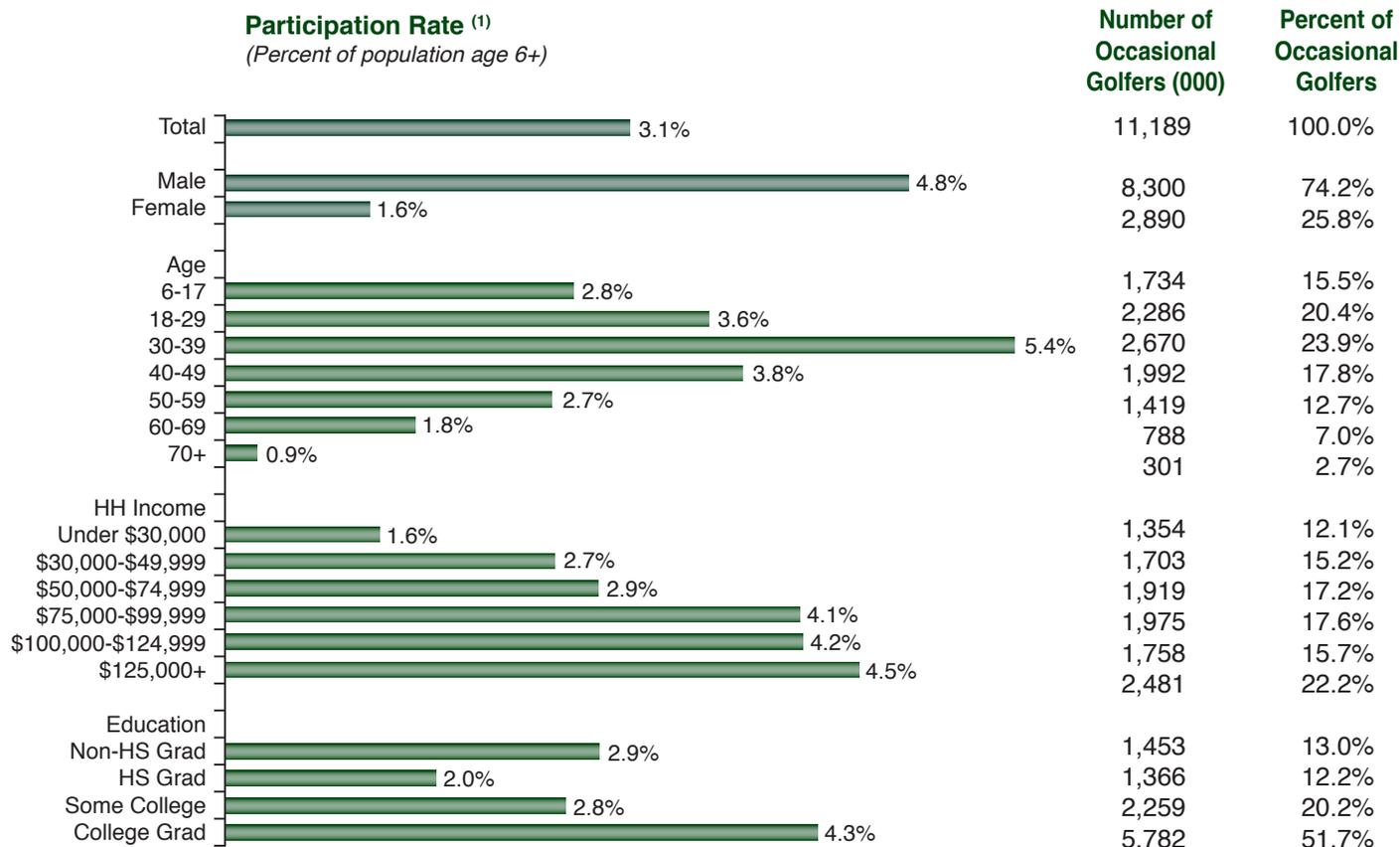


## OCCASIONAL GOLFERS

Number	1985	1990*	1995	2000	2005	2010	2013	2014
All golfers age 6+ (in millions)	6.1	8.3	8.3	9.1	12.0	11.3	11.1	11.2

\* Average of 1989 and 1991

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



(1) Percentage of the given population or demographic segment who are Occasional Golfers.

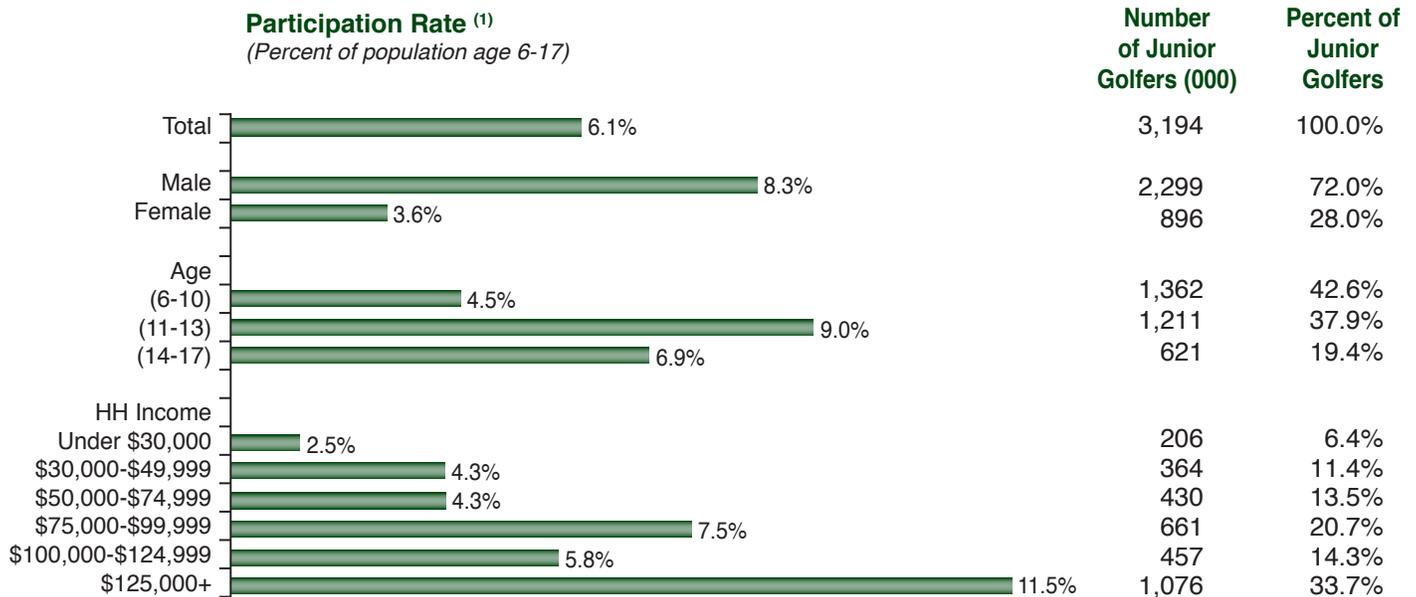


## JUNIOR GOLFERS

Number	1985	1990*	1995	2000	2005	2010	2013	2014
Junior golfers age 6-17 (in millions)	2.0	2.3	2.8	3.0	3.8	2.5	3.0	3.2

\* Average of 1989 and 1991

Averages	Male	Female	Total
Junior golfers age 6-17			
Age	12.6	12.6	12.6
HH Income	\$104,000	\$96,000	\$102,000
Annual Rounds	16.2	14.9	15.8



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



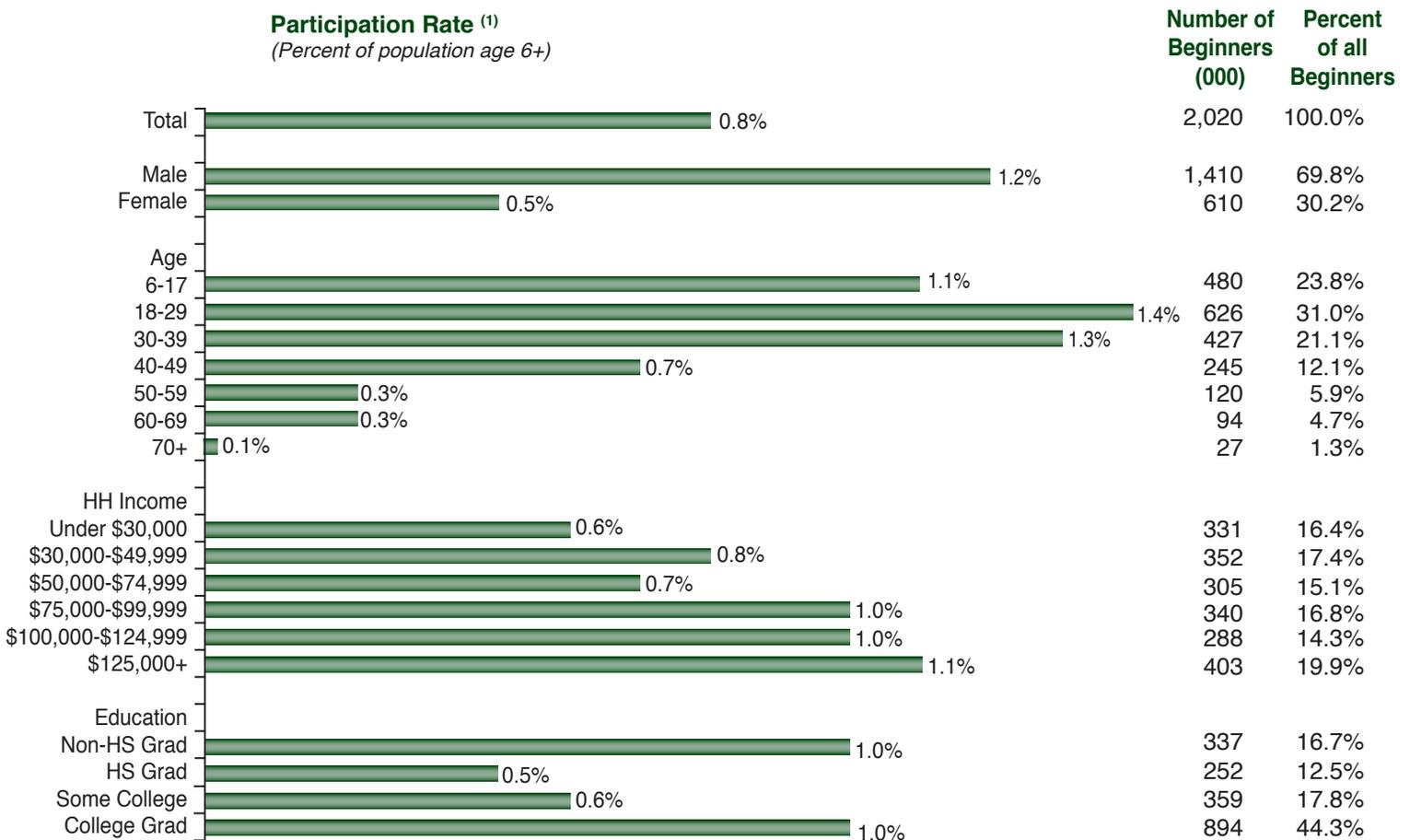
## BEGINNING GOLFERS

Number	1985	1990*	1995	2000	2005	2010	2013	2014
All golfers age 6+ (in millions)	1.3	1.8	1.4	2.4	1.8	1.5	1.9	2.0

\* Average of 1989 and 1991

Averages	Male	Female	Total
All golfers age 6+			
Age	27.2	27.2	27.2
HH Income	\$99,000	\$76,000	\$92,000
Annual Rounds	5.1	4.2	4.8

**Participation Rate <sup>(1)</sup>**  
(Percent of population age 6+)



(1) Percentage of the given population or demographic segment who are Beginning Golfers.



## ROUNDS PLAYED

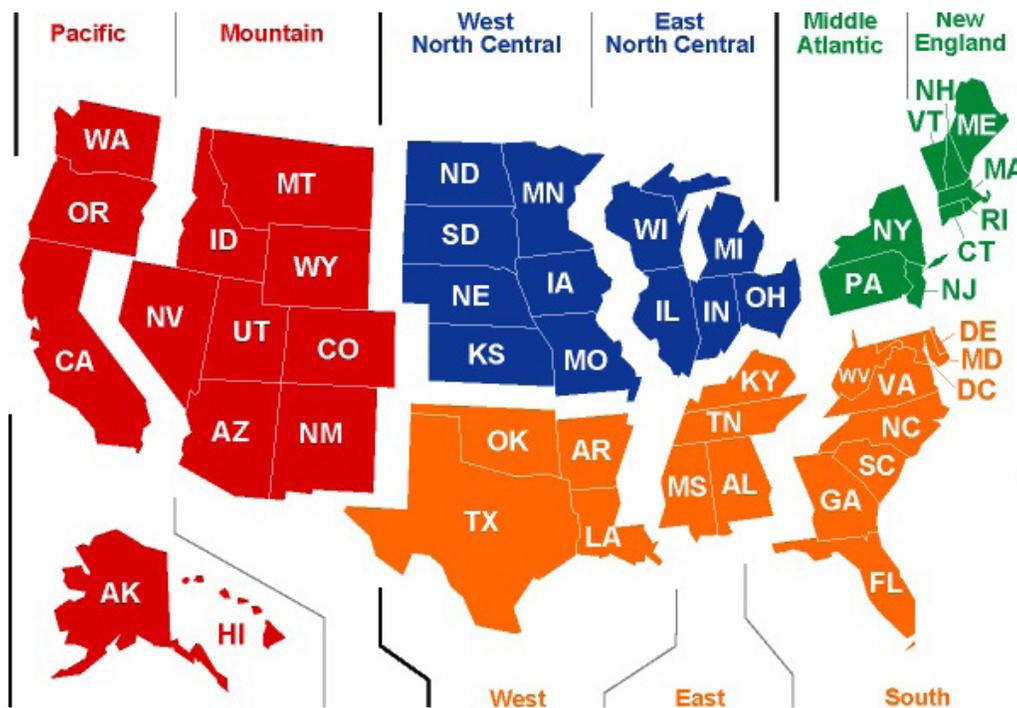
Average Annual Rounds Played	Number of Rounds (MM)	Percent of all Rounds
Total	457.6	100.0%
Male	361.5	79.0%
Female	96.1	21.0%
Age		
6-17	50.6	11.1%
18-29	43.8	9.6%
30-39	50.3	11.0%
40-49	75.0	16.4%
50-59	68.0	14.9%
60-69	88.8	19.4%
70+	81.1	17.7%
HH Income		
Under \$30,000	35.5	7.8%
\$30,000-\$49,999	55.1	12.0%
\$50,000-\$74,999	72.4	15.8%
\$75,000-\$99,999	61.5	13.4%
\$100,000-\$124,999	89.9	19.6%
\$125,000+	143.3	31.3%
Education		
Non-HS Grad	40.9	8.9%
HS Grad	38.6	8.4%
Some College	119.8	26.2%
College Grad	258.3	56.4%
Occasional (1-7)	30.6	6.7%
Moderate (8-24)	80.0	17.5%
Avid (25+)	347.0	75.8%
Core (8+)*	427.3	93.4%

\*Core = Avid + Moderate



## REGIONAL PROFILES

	Participation Rate	Number of Golfers (000)	Percent of Golfers	Average Annual Rounds	Total Annual Rounds (MM)
<b>New England</b>	9.0%	1,283	5.2%	17.4	22.3
<b>Middle Atlantic</b>	7.9%	3,156	12.8%	14.7	46.5
<b>East North Central</b>	10.3%	4,645	18.8%	16.7	77.7
<b>West North Central</b>	10.3%	2,055	8.3%	15.8	32.6
<b>South Atlantic</b>	7.5%	4,436	17.9%	24.4	108.2
<b>East South Central</b>	6.1%	1,090	4.4%	16.7	18.2
<b>West South Central</b>	6.8%	2,429	9.8%	18.5	45.0
<b>Mountain</b>	8.5%	1,854	7.5%	20.1	37.3
<b>Pacific</b>	7.8%	3,782	15.3%	18.5	69.8
<b>Total</b>	<b>8.5%</b>	<b>24,729</b>	<b>100.0%</b>	<b>18.5</b>	<b>457.6</b>

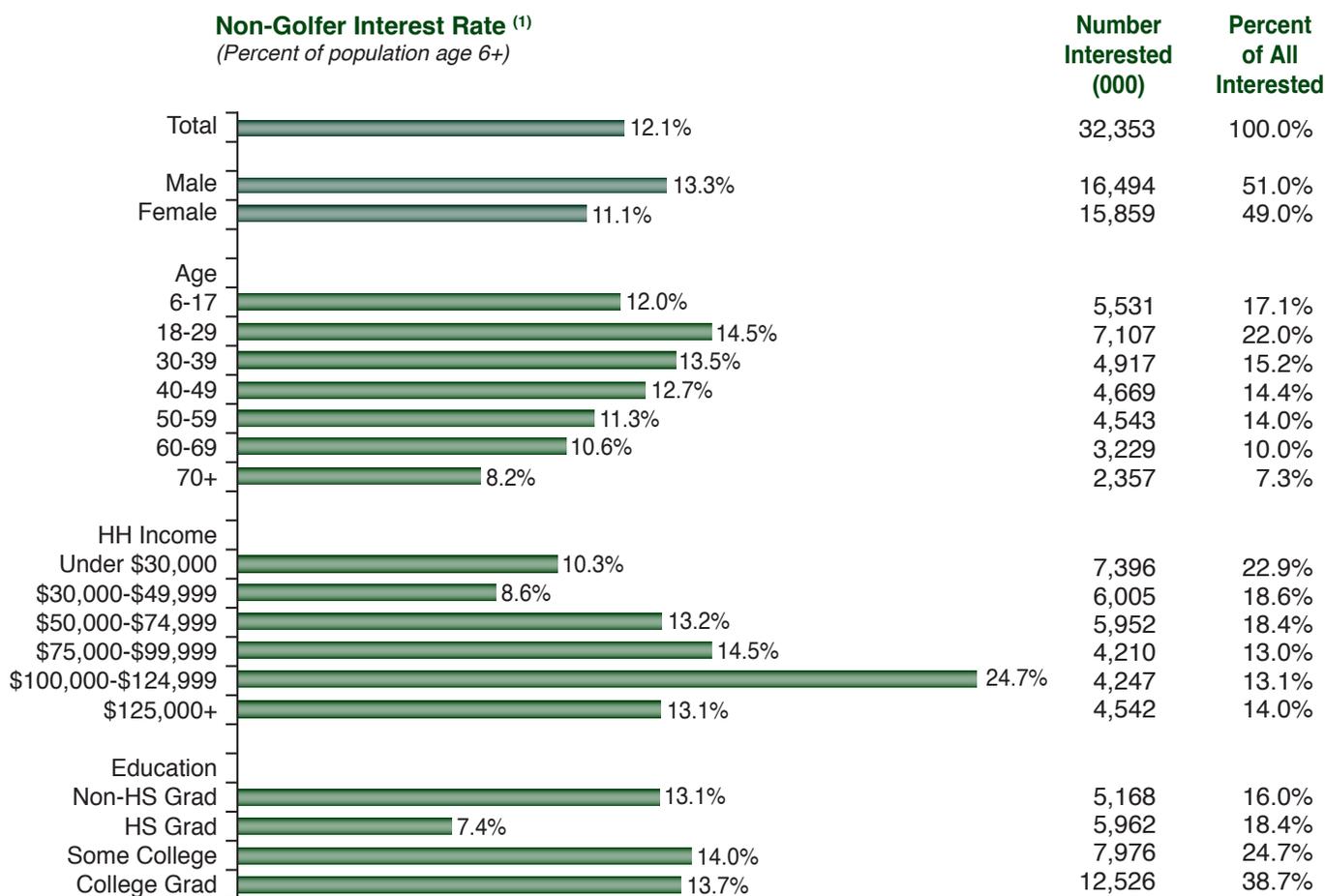




## LATENT DEMAND (interested non-golfers)

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

Averages	Male	Female	Total
Interested non-golfers age 6+			
Age	32.3	32.0	32.2
HH Income	\$76,000	\$78,000	\$77,000



(1) Percentage of the non-golfer population age 6+ who are interested in playing golf.

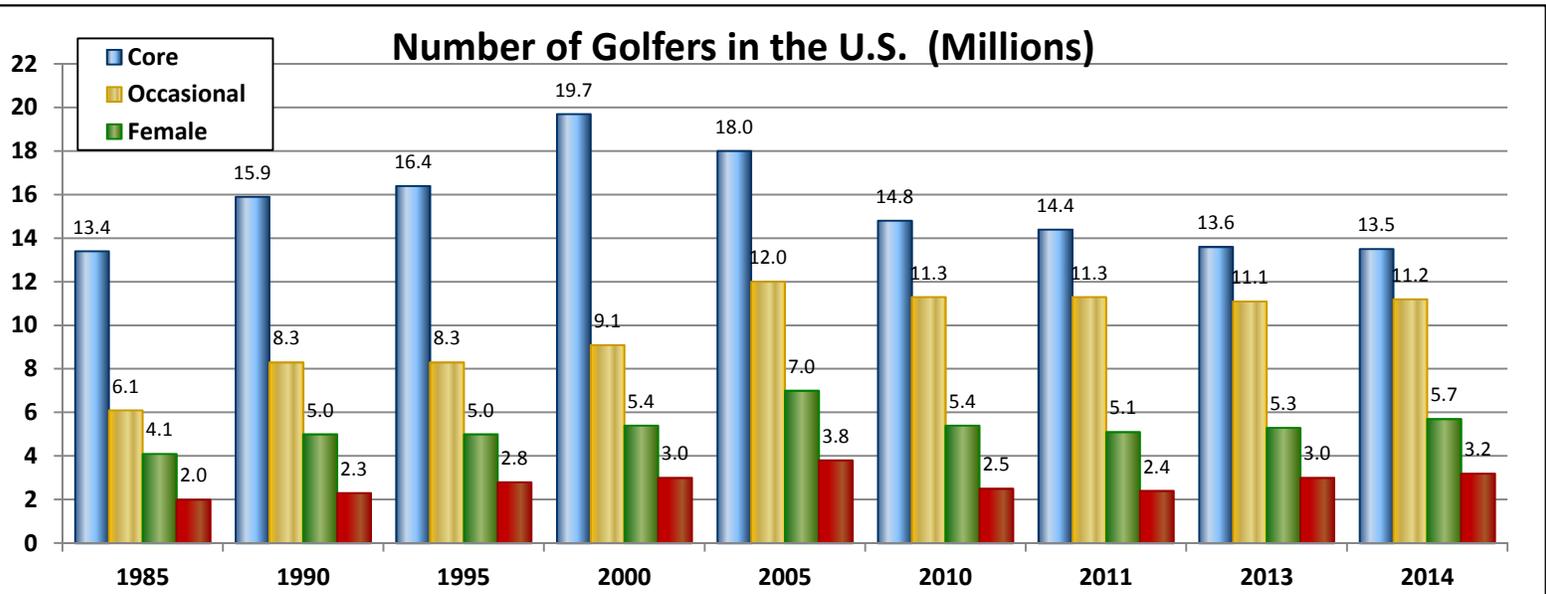


## GOLF PARTICIPATION IN THE U.S. - 2015 EDITION

### Number of Golfers in the U.S. (Millions)

	Annual Rounds	Age	1985	1990*	1995	2000	2005	2010	2012	2013	2014
<b>TOTAL</b>	1+	6+	19.5	24.2	24.7	28.8	30.0	26.1	25.3	24.7	24.7
<b>Occasional</b>	1-7	6+	6.1	8.3	8.3	9.1	12.0	11.3	11.6	11.1	11.2
<b>Core</b>	8+	6+	13.4	15.9	16.4	19.7	18.0	14.8	13.7	13.6	13.5
<b>Avid (inc. in Core)</b>	25+	6+	6.9	8.3	8.4	10.2	9.1	7.0	6.4	6.4	6.5
<b>Junior</b>	1+	6-17	2.0	2.3	2.8	3.0	3.8	2.5	2.7	3.0	3.2
<b>Female</b>	1+	6+	4.1	5.0	5.0	5.4	7.0	5.4	5.0	5.3	5.7
<b>Beginner</b>	1+	6+	1.3	1.8	1.4	2.4	1.8	1.5	1.9	1.9	2.0
<b>Non-Caucasian**</b>	1+	6+						5.5	4.9	5.4	4.9
<b>Interested non-golfers***</b>		6+							27.4	28.6	32.3

\*Average of 1989 and 1991 \*\*Includes African American, Asian-American and Hispanic \*\*\*non-golfers somewhat or very interested in playing golf now



### Participation Rate\*

	Annual Rounds	Age	1985	1990	1995	2000	2005	2010	2012	2013	2014
<b>TOTAL</b>	1+	6+	9.0%	10.7%	10.3%	11.1%	11.1%	9.2%	8.8%	8.5%	8.5%

\*Participation rate is the percentage of the total population age 6+ who played at least one round of golf in a given year

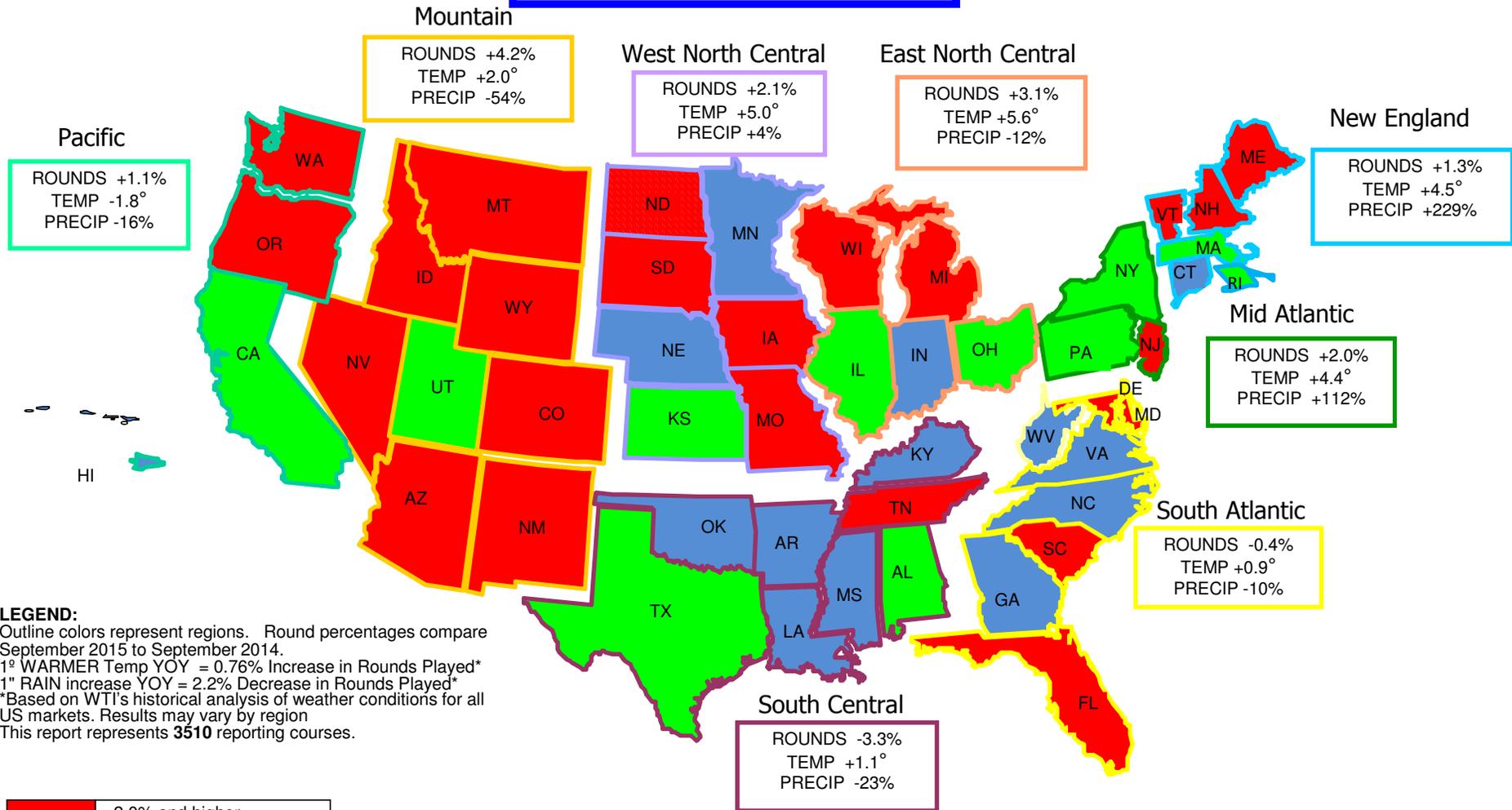
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# NATIONAL GOLF ROUNDS PLAYED REPORT

**U.S. TOTAL**  
**SEPTEMBER '15 YTD '15**  
**+1.2% +0.7%**



**LEGEND:**  
 Outline colors represent regions. Round percentages compare September 2015 to September 2014.  
 1° WARMER Temp YOY = 0.76% Increase in Rounds Played\*  
 1" RAIN increase YOY = 2.2% Decrease in Rounds Played\*  
 \*Based on WTI's historical analysis of weather conditions for all US markets. Results may vary by region  
 This report represents 3510 reporting courses.

	+ 2.0% and higher
	between -1.9% and + 1.9%
	- 2.0% and lower



PGA PerformanceTrak in cooperation with NGCOA, the joint financial benchmarking initiative of the PGA of America and the National Golf Course Owners Association, supports the National Rounds Played Report by supplying data included in this report.

# NATIONAL GOLF ROUNDS PLAYED REPORT



	SEPT	YTD
<b>PACIFIC</b>	<b>1.1%</b>	<b>3.0%</b>
CA	<b>0.1%</b>	<b>1.6%</b>
Los Angeles	1.0%	2.2%
Orange County	0.6%	1.3%
Palm Springs	-2.2%	-2.2%
Sacramento	3.9%	4.7%
San Diego	-1.7%	3.9%
San Francisco/Oakland	-0.3%	0.8%
HI	<b>-5.6%</b>	<b>-1.9%</b>
OR	<b>4.2%</b>	<b>6.0%</b>
Portland	1.9%	7.3%
WA	<b>3.9%</b>	<b>9.1%</b>
Seattle	3.1%	9.0%
<b>MOUNTAIN</b>	<b>4.2%</b>	<b>-0.7%</b>
AZ	<b>3.1%</b>	<b>-3.2%</b>
Phoenix	3.1%	-3.1%
CO	<b>8.6%</b>	<b>-0.4%</b>
Denver	10.8%	-3.1%
ID, WY, MT	<b>2.7%</b>	<b>1.1%</b>
NM	<b>6.4%</b>	<b>-0.5%</b>
NV	<b>2.0%</b>	<b>2.9%</b>
Las Vegas	3.1%	3.2%
UT	<b>1.6%</b>	<b>-0.1%</b>
<b>WEST NORTH CENTRAL</b>	<b>2.1%</b>	<b>2.9%</b>
IA	<b>7.7%</b>	<b>3.4%</b>
KS	<b>1.9%</b>	<b>-1.1%</b>
NE	<b>-4.2%</b>	<b>3.1%</b>
ND,SD	<b>8.8%</b>	<b>4.3%</b>
MN	<b>-2.4%</b>	<b>8.4%</b>
Minneapolis/St.Paul	-3.2%	8.7%
MO	<b>3.1%</b>	<b>-3.8%</b>
St Louis	2.5%	-2.1%
Kansas City	2.9%	-2.2%

	SEPT	YTD
<b>UNITED STATES</b>	<b>1.2%</b>	<b>0.7%</b>
<b>PUBLIC ACCESS</b>	<b>1.7%</b>	<b>1.3%</b>
<b>PRIVATE</b>	<b>-0.9%</b>	<b>-1.6%</b>

<b>EAST NORTH CENTRAL</b>	<b>3.1%</b>	<b>4.3%</b>
IL	<b>-1.1%</b>	<b>1.0%</b>
Chicago	-2.6%	0.1%
IN	<b>-6.5%</b>	<b>-2.7%</b>
MI	<b>10.4%</b>	<b>8.6%</b>
Detroit	10.2%	10.9%
OH	<b>-0.9%</b>	<b>3.6%</b>
Cincinnati	1.3%	-1.0%
Cleveland	-2.2%	5.1%
Columbus	-2.1%	-2.8%
WI	<b>11.2%</b>	<b>7.9%</b>
Milwaukee	8.7%	7.6%
<b>SOUTH CENTRAL</b>	<b>-3.3%</b>	<b>-7.5%</b>
AL	<b>-0.7%</b>	<b>-4.6%</b>
Birmingham	2.3%	-0.2%
AR	<b>-13.9%</b>	<b>-11.9%</b>
KY	<b>-7.1%</b>	<b>-4.2%</b>
LA	<b>-2.2%</b>	<b>-5.8%</b>
MS	<b>-8.2%</b>	<b>-7.4%</b>
OK	<b>-6.7%</b>	<b>-6.3%</b>
Oklahoma City	-7.3%	-7.5%
TN	<b>2.4%</b>	<b>-6.4%</b>
Nashville	4.4%	-5.7%
TX	<b>-1.7%</b>	<b>-8.9%</b>
Dallas/Ft. Worth	-2.4%	-7.6%
Houston	-0.6%	-10.9%
San Antonio	-1.6%	-9.9%

	SEPT	YTD
<b>SOUTH ATLANTIC</b>	<b>-0.4%</b>	<b>0.4%</b>
DE, DC, MD	<b>2.1%</b>	<b>1.7%</b>
Washington/Baltimore	-0.3%	0.7%
FL	<b>4.1%</b>	<b>2.0%</b>
Jacksonville/Daytona	5.6%	5.0%
Orlando	1.7%	3.6%
Tampa	7.2%	2.4%
Palm Beach	-0.8%	-1.9%
Sarasota	-3.0%	-2.8%
Naples/Ft Myers	-0.9%	5.0%
Miami/Ft.Lauderdale	6.2%	1.1%
GA	<b>-7.9%</b>	<b>-0.8%</b>
Atlanta	-11.5%	-2.0%
NC	<b>-4.2%</b>	<b>-1.6%</b>
Greensboro/Raleigh	-6.2%	0.1%
SC	<b>3.0%</b>	<b>-3.6%</b>
Charleston	12.6%	0.2%
Hilton Head	6.2%	1.8%
Myrtle Beach	8.2%	-4.0%
VA	<b>-2.6%</b>	<b>1.5%</b>
WV	<b>-2.7%</b>	<b>-1.7%</b>
<b>MID ATLANTIC</b>	<b>2.0%</b>	<b>2.0%</b>
NJ	<b>3.6%</b>	<b>3.3%</b>
NY	<b>1.9%</b>	<b>2.2%</b>
New York City	1.0%	2.3%
PA	<b>1.3%</b>	<b>1.1%</b>
Philadelphia	2.0%	3.2%
Pittsburgh	-3.5%	-1.5%
<b>NEW ENGLAND</b>	<b>1.3%</b>	<b>-0.4%</b>
CT	<b>-5.8%</b>	<b>-4.1%</b>
Hartford	-4.1%	-2.0%
MA, RI	<b>0.7%</b>	<b>0.9%</b>
Boston	-2.2%	-0.1%
ME, NH, VT	<b>7.0%</b>	<b>0.3%</b>

The percentages represent the differences in number of rounds played comparing September 2015 to September 2014.  
 For more information contact Golf Datatech, [golfroundsplayed@golfdatatech.com](mailto:golfroundsplayed@golfdatatech.com) or call 407-944-4116