



Frequent Golfer Study

A Look at Why Golfers Are Playing Less

Presented to

WORLD GOLF FOUNDATION

by



A decorative image in the top left corner shows a lush green golf course with a fairway and a hole, surrounded by trees and a clear sky.


Introduction

Rounds of golf played in the U.S. dropped three percent (15.7 million rounds) between 2001 and 2002, according to NGF statistics. Part of the drop was attributable to a decrease in play frequency by otherwise frequent golfers.

This study looks at why these golfers reduced their frequency and what might persuade them to return to their former level of play. The report is based on survey responses from 1,059 golfers collected in June 2003. Responses were from an online panel fitting the profile of golf's best customers, the nine million players who are responsible for about 80 percent of rounds and spending. Respondents were first screened as having played at least 25 rounds in 2001 and at least 20 percent fewer rounds in 2002.

The group of golfers who are the subject of this report are important: They are estimated to number 500,000 and their frequency decreased by about 20 rounds on average, so the total rounds lost by this group was about 10 million, or two in three rounds lost in 2002.

No doubt there were less frequent golfers whose frequency also decreased, but they are not as important to the bottom line. We assume that their reasons for a decrease in play are similar to the group studied.

A decorative image in the bottom right corner shows a golfer in a green shirt and white pants standing on a green golf course, looking towards a hole in the distance.

An aerial photograph of a lush green golf course, showing a fairway, a green, and surrounding trees.

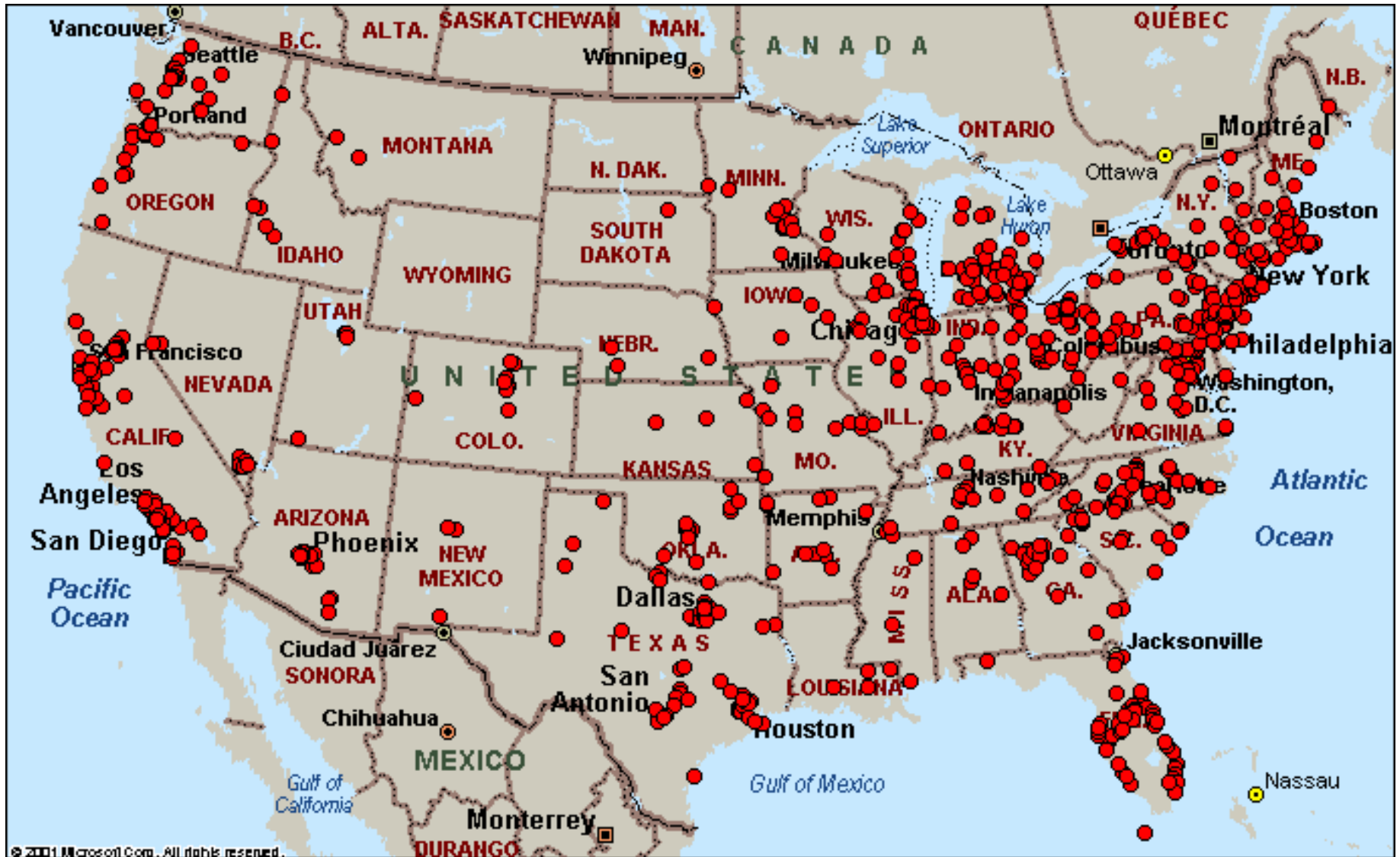
Introduction (continued)

The objectives of the study were to understand why frequent golfers played less, what, if anything, replaced golfing and what it will take to get them back. It found that these golfers are still very avid and that they are likely to increase rounds on their own as the economy improves and/or job pressures decrease.

Some of the reasons for decreasing rounds are beyond anyone's control: the weather, poor health, etc. Some reasons are more addressable: discounts, family play, partner programs, couple play, affordable lessons, play with non-golfing spectators, flexible number of holes, child care and pay/play by the hour.



Distribution of Study Participants



A decorative image in the top left corner shows a lush green golf course with a winding path and a small pond, set against a white background.

The Segments

In order to better understand declining rounds, respondents were separated into four segments based on demographics:

Married with Children – Frequent golfers with children under 18 in the household.

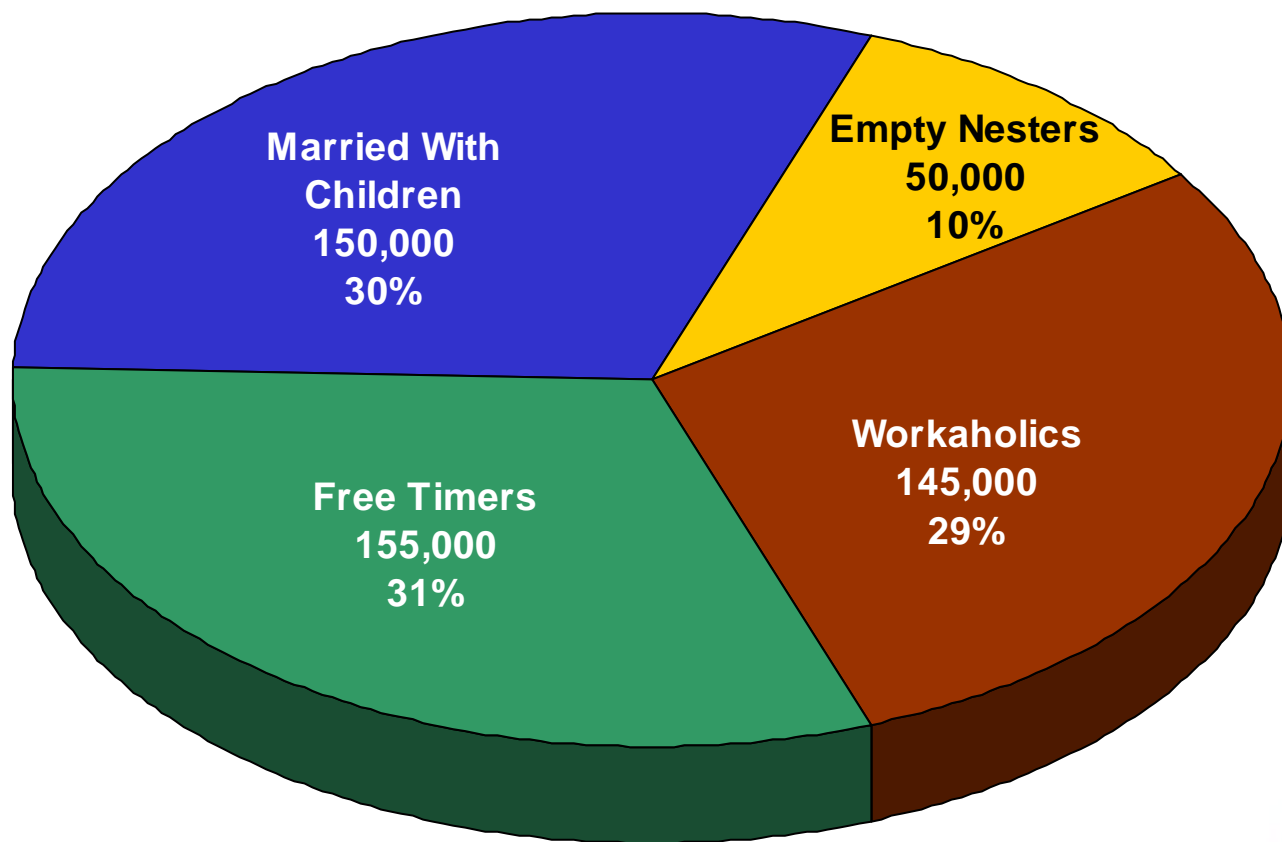
Workaholics – Those with no children in the household under 18, employed full-time and work more than 40 hours per week.

Empty Nesters – Those with no children in the household under 18, employed full-time and work 40 or less hours per week.

Free Timers – employment status is retired/part-time/homemaker/unemployed, with no children under 18 in the household and work less than 40 per week (most less than 20 hours per week).



Segment Sizes



Segment Profiles

	Married with Children	Workaholics	Empty Nesters	Free Timers
Average Age	44.4	49.9	51.5	64.1
Average number of children <18	1.8	N/A	N/A	N/A
Average household income	\$76,420	\$79,820	\$68,790	\$62,950
Percent break 100	88%	84%	80%	81%
Average annual fee spending	\$467	\$502	\$461	\$482
Average annual equipment spending	\$330	\$365	\$358	\$329
Percent employed full-time	89%	100%	100%	0%
Percent work more than 40 hours	73%	100%	0%	0%
Average rounds 2001	58.3	65.5	64.3	83.7
Average rounds 2002	36.7	44.0	43.6	56.9



A photograph of a golf course landscape, showing a green fairway and a sand trap, is positioned in the top left corner of the slide.

Segment Profiles (continued)

Married with Children are the youngest segment and the only one with children. They are the most price-sensitive when it comes to golf, even though their income is second-highest. They have the lowest average rounds of any segment (37 in 2002).

Workaholics average 50 years of age, have the highest income and spend the most on golf. They are all working more than 40 hours per week and have no children in the household.

Empty Nesters are about the same age as Workaholics but they don't work as much and have no children in the household.

Free Timers are the oldest segment, have the lowest income but play the most rounds of any segment (57 in 2002) and are the most skilled golfers. Most are retired.



Reasons Play Frequency Dropped - Unaided

First we asked golfers to type in the number one reason their play frequency dropped – this is “unaided” response.

Each segment has significant reasons for a frequency drop that are beyond anyone’s control. But each segment also has a silver lining.

Married with Children have the most family responsibilities and the least free time, but they are the healthiest and have somewhat less job responsibility than Workaholics.

Workaholics have the most job responsibility but, because they have no children in the home, have little family responsibility.

Empty Nesters report health problems, but have less job responsibility (work 40 hours or less) and more free time.

Free Timers have the most health concerns but have little job responsibility and the most free time.

None of the segments reported, unaided, that money was much of an issue in reducing their play frequency.

	Married with Children	Workaholics	Empty Nesters	Free Timers
Job responsibilities	21%	28%	14%	5%
Lack of free time	19	17	10	8
Family responsibilities	15	3	4	4
Health/injury	8	13	23	45
Not enough money	3	4	4	3



Reasons Play Frequency Dropped - Aided

Next we showed golfers a list of possible reasons their play frequency decreased and asked them to check all that applied – this is “aided” response. When aided, certain responses rose in importance, such as “not enough money.”

Leaving aside significant factors beyond our control, these factors, though less significant, are addressable:

- Trouble finding partners
- Difficult to get tee times
- Didn't play well (especially Free Timers)

	Married with Children	Workaholics	Empty Nesters	Free Timers
Job responsibility	62%	65%	45%	17%
Working more hours	45	53	26	11
Time with family	42	15	17	8
Less money in this economy	22	20	24	23
Round too expensive	19	13	13	13
Life change	17	6	8	6
Health	12	17	27	51
Trouble finding partners	12	16	13	14
Time on hobbies	11	9	15	10
Traveled less	9	11	10	10
18 holes takes too much time	8	4	4	3
Difficult to get tee times	8	9	10	3
Didn't play well	5	12	13	15
Equipment too expensive	5	6	6	7



Comparison to 1986

This report confirms that the reasons for playing less are the same as they were 17 years ago. In a 1986 mail panel study fielded by Market Facts, Inc., NGF asked golfers their reasons for not playing golf more often. Work, family and cost were the top reasons.

	<u>All golfers</u>
Not enough time due to work	71%
Not enough time due to family	40%
Golf fees too expensive	30%
Courses too crowded/hard to get tee time	22%
Weather	21%
Don't have enough people to play with	16%
Don't play well enough	14%
Takes too much time to play	8%
Equipment too expensive	6%
Physical problems	3%
Does not provide enough exercise	1%



The background of the slide is a photograph of a golf course. In the top left, there is a large green tree. In the bottom right, a golfer in a light-colored shirt and dark pants is standing on a green, looking towards the right. The rest of the background is a soft-focus view of a golf course with trees and a path.

Reasons play frequency dropped – Verbatims

Married with Children

“Got married. Isn't that everyone's #1 reason? And dropped my membership because I was not playing enough to join.”

“Have a second child, and golf is expensive.”

“Less time available, married and grad school.”

“We had a baby and can't find the time.”

“Less time available for outside interests and fewer business customers that would take the time to play.”

“I am in the military and it's hard to play consistent golf year-round with our mission of defending the country.”

“Work-related issues are the biggest reason but also that my sons are getting older and are into a lot of other extracurricular activities.”

“I personally built a new home for my new family during nights and weekends and I work full-time as well.”

“I have two children involved in youth sports and they take up a lot of the weekends.”

“Spent time coaching daughter's softball team. Instead of golfing, I spent time working with her and her team.”

“I was downsized and couldn't afford to play as much due to financial constraints.”

“New job required more office time and less golf time.”

A photograph of a lush green golf course with a winding path and trees, located in the top left corner.

Reasons play frequency dropped – Verbatims

Workaholics

“It was costing more money than I imagined. I just started playing golf in 2001 and I couldn’t stop. I kinda had the bug. I used to play twice a week regularly and sometimes up to four times a week. I used to even play twice in one day. Now I play at least once to twice a week.”

“I have been so busy working that unfortunately my golf has suffered.”

“I lost my golfing partner and haven't found another one that wants to play every weekend.”

“My golfing buddies gained more responsibilities, *i.e.*, children.”

“Dropped out of a second league during the week (19 rounds).”

“Graduated college and got a new job that doesn't allow me as much time to golf.”

“I didn't renew my membership at the club I had the two previous seasons.”

“Cost of rounds has increased.”

“Did so poorly that I figured I would just give it up.”

“Very difficult to get a tee time, coupled with very slow play by non-golfers!”

“More time working and getting kids through college.”

“I was retired but returned to work in 9/02.”

“My full time job got in the way during 2002. I hope to make up for that in 2003.”



A circular inset image in the top left corner shows a lush green golf course with a winding path and a small pond.

Reasons play frequency dropped – Verbatims

Empty Nesters

“Golf Injury -- Torn (100%) Anterior Cruciate Ligament; Torn (75%) Medial Collateral Ligament; and Non-Displaced Fracture of the Proximal Fibula.”

“Much busier at work so had less playing time.”

“My lecture schedule extended into my May-August free time.”

“I got divorced and gave up my country club membership because of the cost.”

“Bought a summer home at the beach.”

“Moved during the summer and had to transition to new employment, social groups and other related activities.”

“I was laid off work for six months, had to limit spending.”

“More business and family trips.”

“Did not go on a golf vacation in 2002.”



A photograph of a lush green golf course with a winding path and trees, located in the top left corner.

Reasons play frequency dropped – Verbatims

Free Timers

“Broke my arm and was out for three months.”

“Heart attack and a broken leg kept me off the course after August of 2002.”

“Triple bypass surgery kept me sidelined for four months.”

“I had a hip replacement.”

“I was working in 2002 due to the decline in the stock market.”

“I went back to work part-time, after being retired for two years.”

“Came out of retirement, became a real estate agent.”

“I relocated from the Northeast to the Southeast, started a new job, and have not found the time nor a course to play on a regular basis.”

“Some of my regular playing friends passed away or stopped playing as often.”

“Belonged to a golf course in 2001 and not 2002.”

“Got tired of playing bad.”

“Traveled more for work in 2002; will play more golf in 2003.”



Activities That Replaced Golfing

Apart from the obvious – Workaholics working, Married with Children spending time with family, etc. – other sports and other recreation represent significant competition to golf, particularly among Free Timers.

	Married with Children	Workaholics	Empty Nesters	Free Timers
	%	%	%	%
Work	36	47	35	12
Family	31	10	17	9
Other sports*	11	8	12	13
Work around house	11	17	19	12
Other recreation*	11	8	9	23
Recuperation	5	6	2	14

* Specified other sports and other recreation (in descending order of mentions) were: Exercise/Fitness, Reading, Computer/Internet, Team Sports, Fishing/Hunting, Watching TV, Gardening, Volunteering, Tennis/Racquetball and Boating.



Impact of the Economy

A significant percentage of golfers across all segments agreed that the poor economy of the past few years caused them to spend less on leisure in general, travel less and lose confidence.

However, far fewer golfers said that the economy caused them to play less golf.

An improvement in the economy would cause about a third of frequent golfers to play more.

	Married with Children	Workaholics	Empty Nesters	Free Timers
	%	%	%	%
Cut back my investments	46	47	42	52
Traveled less	42	47	50	50
Held off making major purchases	41	39	35	38
Haven't been confident since 9/11	40	48	42	49
Spent less on leisure	40	40	41	41
Economy caused less golf	18	16	19	20
Losing portfolio-less golf	5	9	5	14
If economy improves-play more	28	28	36	26



Factors That Would Increase Frequency (unaided)

First we asked golfers to type in the number one factor that would cause them to increase their play frequency to its former level – this is “unaided” response.

Many factors that would increase play are naturally the inverse of reasons play frequency decreased initially.

	Married with Children	Workaholics	Empty Nesters	Free Timers
	%	%	%	%
More time	31	20	20	9
Less work	12	20	8	3
More money	11	9	13	9
Golf less expensive	8	8	6	7
Children grow up	7	0	1	0
Better health	6	11	18	41
Playing partners	2	4	5	6
Play better	2	6	2	5
Retirement	1	9	6	1



Factors That Would Increase Frequency (aided)

Next we showed golfers a list of possible factors that would make their play frequency increase and asked them to check all that apply – this is “aided” response. When aided, certain responses rise in importance, such as the cost of golf. In the table below, it is easier to find addressable factors within each segment.

Percent very/somewhat likely to play more if factor occurred.

	Married with Children	Workaholics	Empty Nesters	Free Timers
	%	%	%	%
More free time	88	88	72	35
More disposable income	73	66	70	44
Discounts	72	64	64	52
Child 12-17 play	49	5	3	4
Regular playing partner	47	46	42	42
Spouse play	43	32	30	24
Child 5-11 play	36	4	1	3
Affordable lessons	33	35	35	25
Spectator join me	25	22	22	10
Course closer to home	21	18	14	14
Play and play for a flexible number of holes (3,6,9)	20	15	14	13
Child care	14	1	1	0
By the hour	12	10	4	6

The background of the slide is a photograph of a golf course. In the top left, there is a close-up of a green and a fairway. In the bottom right, a golfer in a light-colored shirt and dark pants is seen from behind, standing on a green and preparing to hit a ball. The overall scene is bright and sunny.

Factors That Would Increase Frequency – Verbatims

Married with Children

“Get the kids in college.”

“Money!!”

“Financial recovery.”

“Don't have regular bunch to play with.”

“Improvement in play, more enjoyment.”

“A 50-hour-a-week job or weekends off.”

“A job that requires less than 60 hours a week.”

“If you took over and helped me change diapers.”

“Reasonable and affordable green fees.”

“Have my son grow up faster so he can play golf with me more often.”

“When my daughter gets old enough to play.”

“As my children get older, I'll have more time for golf.”

“If a round could be played under four hours.”

“I expect to play the most golf ever in 2003. My work load has slowed down.”

The background of the slide is a photograph of a golf course. In the top left, there is a large green tree. In the bottom right, a golfer in a light-colored shirt and dark pants is standing on a green, preparing to swing. The rest of the background is a soft-focus view of a golf course with trees and a path.

Factors That Would Increase Frequency – Verbatims

Workaholics

“My retirement in about one year!”

“Right after I catch my second 100-pound giant trevally.”

“Getting my husband to like and play golf more than he does.”

“More playing partners.”

“Twilight league at new club.”

“Finding someone to play either Saturday or Sunday afternoon.”

“Improvement in my play. I have added six strokes to my handicap in the past 2.5 years, due to lack of time to play and practice.”

“Not having to work 80+ hours per week at work, including weekends.”

“I’m in my prime earning years, so I’m spending more time working toward retirement. Some more free time would do it.”

“Taking a few vacation days during the week so I can get out and play golf.”

“Reduction in green fees, new equipment, increased skill level.”

“Improved economy, market conditions.”

“Golfing with family members.”

A photograph of a lush green golf course with a winding path and trees, located in the top left corner of the slide.

Factors That Would Increase Frequency – Verbatims

Empty Nesters

“Health. Already have played nine times in 2003 despite not playing in winter.”

“I plan to retire soon, so I will definitely be increasing my amount of play.”

“I am playing more this year as I have cut back on my jobs.”

“Better Business Economy!!”

“Kids off to college.”

“Incentives by the golf courses to bring me back, such as giving better rates to the locals during the tourist season.”

“Finding the time to play during the week, since the weekends are pretty much taken up with family activities.”

“Someone available to play with on a consistent basis.”

“Change of job - which I am pleased to say has happened so 2003 should be a better year for golf.”



A photograph of a lush green golf course with a fairway and a hole in the foreground, surrounded by trees and a clear sky.

Factors That Would Increase Frequency – Verbatims

Free Timers

“More money, more golfing friends.”

“Increase in value of retirement portfolio.”

“As soon as I'm back to 100%. But will try once a week this summer.”

“Finding a man who loves to golf as much as I do.”

“If I saw a marked improvement in my game.”

“Lessons Lessons Lessons.”

“Cost to play must decrease and I need to play better.”

“Business picks up and the stock market returns to its bullish days.”

“Finding a course close to home that has a reasonable yearly fee.”

“More practice and a few lessons from a pro.”

“I plan to play even more this year now that I have healed and feel good.”



A photograph of a lush green golf course with a pond and trees in the background, located in the top-left corner of the slide.

Implications - Overall

Some natural recovery of lost rounds is likely due to economic recovery.

No over-riding solution presents itself.

Actions that lead to deeper engagement of golfers into the game offer the most promise for rounds recovery:

1. Facilitate finding of playing partners.
2. Promote/facilitate couples golf and family golf.
3. Teach, teach, teach.



A circular inset image in the top left corner shows a lush green golf course with a winding path and a body of water.

Implications – Married with Children

The segment's main reasons for decreasing rounds were job and family responsibilities. Having more free time is the top of mind factor that would get them back.

Addressable factors: Married with Children were the segment most likely to be influenced by these factors, in descending order of importance:

- Discounts
- Playing with children
- Having regular playing partners
- Playing with spouse
- Affordable lessons
- Playing with a non-golfing spectator
- Playing and paying for a flexible number of holes
- Child care offered at course
- Paying and playing by the hour



A photograph of a lush green golf course with a pond and trees in the background, partially obscured by the title.

Implications - Workaholics

The segment's main reason for a drop in rounds was job-related.

Addressable factors in descending order:

- Discounts
- Having regular playing partners
- Affordable lessons
- Playing with spouse
- Play with a non-golfing spectator
- Playing and paying for a flexible number of holes
- Pay and play by the hour



A photograph of a lush green golf course landscape, showing a fairway and a green with a hole, surrounded by trees and a clear sky.

Implications – Empty Nesters

Empty Nesters have free time for golf but sometimes poor health prevents them from playing – that and job responsibilities were the main reasons for a drop in play.

Addressable factors in descending order:

- Discounts
- Having regular playing partners
- Affordable lessons
- Playing with spouse
- Play with a non-golfing spectator
- Playing and paying for a flexible number of holes



A decorative image in the top left corner shows a lush green golf course with a winding path and a small pond, surrounded by dense trees.

Implications – Free Timers

Poor health was this segment's main reason for a drop in play, although they do have time to play generally. Factors that are important to other segments are less or much less important to Free Timers: free time, disposable income, discounts, spouse play, affordable lessons and spectator play.

Addressable factors in descending order:

- Discounts
- Having regular playing partners



Addressable Factors - Summary

	Married with Children	Workaholics	Empty Nesters	Free Timers
Discounts	✓	✓	✓	✓
Child play	✓			
Regular partners	✓	✓	✓	✓
Spouse play	✓	✓	✓	
Affordable lessons	✓	✓	✓	
Spectator play	✓	✓	✓	
Flexible holes	✓	✓		
Child care	✓			
By the hour	✓	✓		

