

2002 Rounds Played in the United States





Research Overview

In 2002, the National Golf Course Owners Association and the National Golf Foundation partnered to measure rounds played in the United States. All 15,720 facilities in the U.S. were invited to participate and rounds played data was received from 2,426, a response rate of just over 15%.

Based on this sample size, the number of rounds played in the United States is accurate within +/- 2.0%.

Total Rounds Played in the United States

Prior to 2002, the number of rounds played in the United States has been measured by asking golfers how many rounds they played in a given year, and projecting the average across the 26+ millions of golfers aged 12 and older. While consumer reported rounds played information is useful in defining and segmenting golfers (e.g. occasional, core, or avid players), it has been hypothesized that golfers tend to think they play a little more than they actually do.

The NGCOA/NGF rounds played study confirms this hypothesis. **In 2001, approximately 520 million rounds of golf were played in the United States (518.1 million) at regulation facilities.** To date, the volume of alternative rounds has not been quantified. Previous consumer based estimates projected total rounds (regulation and alternative) to be approximately 580 million, thus it appears the consumer-based estimates are within 10% of the actual number of rounds played.

Reasons for Changes

There was little material change seen in 2001 (518.1 million) compared to 2000 (518.4 million). Some regions were up and some were down, primarily due to the weather. Among facilities reporting an increase in 2001, nearly half (42%) cited improved weather as the reason. Secondary reasons included renovations, changes to the membership, course conditions, or advertising and promotion.

Among facilities reporting a decrease in 2001, over half (52%) reported weather to be the reason. The economy and 9/11 also had an impact, as over one-fourth (27%) of the facilities with decreased rounds cited either as the reason.

Measuring Rounds Played in 2003 and Beyond

The NGCOA and NGF are continuing to track the volume of rounds played in the United States and will report findings to the industry through Golf 20/20 on a quarterly basis beginning in 2003.

Rounds Played in the United States

(Figures in millions of rounds)



	<u>2001</u>	<u>2000</u>	<u>% Change</u>
Total Rounds	518.1MM	518.4MM	-0.1%
<u>Region</u>			
1. Northeast	71.1	69.4	2.4%
2. Mid Atlantic	31.7	30.6	3.7%
3. Southeast	65.8	64.8	1.5%
4. Central/South Florida	36.5	35.4	2.9%
5. Gulf Coast	28.8	29.2	-1.4%
6. South Central	32.5	32.3	0.9%
7. Lower Midwest	90.5	92.3	-1.9%
8. Upper Midwest	55.0	58.3	-5.7%
9. Mountain	19.7	18.4	7.2%
10. Southwest	64.5	65.0	-0.8%
11. Northwest	22.0	22.7	-3.0%
<u>Number of Holes</u>			
9-Hole	117.6	123.4	-4.7%
18-Hole	310.7	306.9	1.2%
27+ Hole	89.8	88.1	1.9%
<u>Course Access</u>			
Public	388.9	390.1	-0.3%
Private	129.2	128.3	0.7%
<u>Price Point*</u>			
Premium	110.1	106.7	3.2%
Standard	226.2	229.0	-1.2%
Value	181.8	182.7	-0.5%

*For each region, facilities fall into one of three categories based on price:

Premium (High)- 80-99th percentiles

Standard (Middle)- 40-79th percentiles

Value (Low)- 1-39th percentiles



Reasons for Increasing Rounds

Reasons for Increase	Total	Region											Holes			Price Point		
		Northeast	Mid Atlantic	Southeast	Central/South Florida	Gulf Coast	Lower Midwest	Upper Midwest	Mountain	Southwest	Northwest	South Central	9	18	27+	Premium	Standard	Value
Count	535	83	45	105	34	25	77	42	20	62	22	20	32	413	90	209	228	98
Weather	42%	66%	49%	39%	15%	24%	47%	36%	50%	26%	41%	45%	59%	42%	33%	35%	44%	51%
Renovations	9%	6%	16%	11%	12%	8%	6%	0%	10%	10%	5%	25%	13%	8%	11%	8%	9%	11%
Membership	9%	6%	4%	10%	18%	16%	4%	2%	5%	15%	9%	10%	0%	8%	16%	8%	9%	9%
Course condition	7%	7%	11%	10%	9%	4%	9%	7%	0%	6%	0%	0%	9%	8%	3%	4%	11%	6%
Advertising/marketing	7%	4%	4%	6%	12%	16%	6%	12%	10%	6%	9%	5%	9%	7%	9%	10%	6%	4%
Area growth	6%	0%	2%	8%	12%	12%	0%	12%	20%	6%	9%	0%	0%	6%	8%	8%	5%	2%
Discount rounds	5%	2%	2%	5%	9%	0%	9%	7%	0%	11%	0%	5%	3%	5%	10%	8%	4%	3%
Other	4%	5%	4%	4%	0%	0%	8%	2%	5%	8%	0%	0%	3%	5%	3%	4%	3%	7%
Added new course	4%	1%	2%	6%	3%	4%	3%	10%	15%	3%	5%	0%	0%	5%	3%	6%	4%	1%
Management	3%	4%	2%	2%	9%	4%	1%	10%	0%	2%	5%	5%	6%	3%	2%	4%	3%	3%
Economy	3%	1%	2%	5%	0%	4%	4%	5%	0%	2%	9%	0%	0%	3%	4%	3%	4%	2%
911	2%	2%	0%	1%	3%	0%	5%	2%	5%	0%	14%	0%	0%	3%	0%	2%	4%	0%
Too many courses	2%	1%	4%	2%	3%	8%	1%	0%	0%	2%	0%	0%	0%	2%	1%	1%	2%	2%
Competition	2%	1%	2%	2%	0%	0%	1%	5%	5%	2%	0%	0%	0%	2%	2%	2%	1%	2%
Golfer segment change	1%	1%	4%	0%	0%	0%	3%	2%	0%	2%	0%	0%	0%	1%	1%	1%	2%	1%
Tourism	1%	0%	0%	1%	3%	0%	0%	0%	0%	0%	0%	5%	0%	0%	2%	1%	0%	0%
Increased prices	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	5%	0%	0%	0%	0%	0%	0%	0%



Reasons for Decreasing Rounds

Reasons for decrease

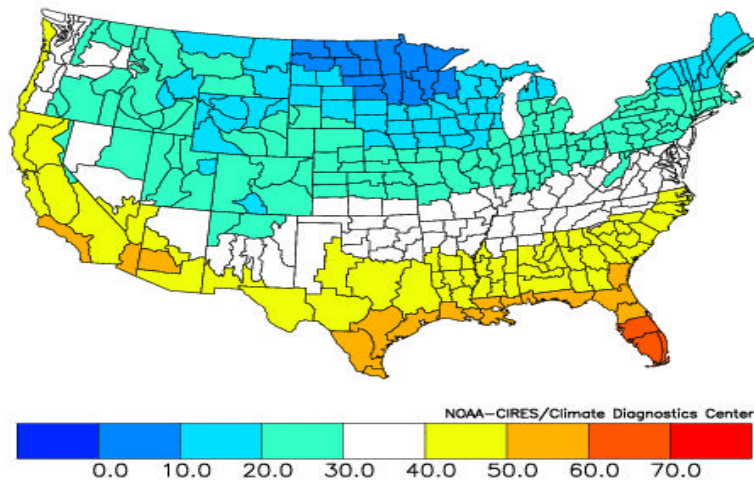
	Total	Region											Holes			Price Point		
		Northeast	Mid Atlantic	Southeast	Central/South Florida	Gulf Coast	Lower Midwest	Upper Midwest	Mountain	Southwest	Northwest	South Central	9	18	27+	Premium	Standard	Value
Count	688	68	43	63	42	42	147	129	23	79	33	19	55	505	128	244	335	109
Weather	52%	54%	26%	25%	14%	43%	68%	80%	65%	44%	30%	47%	62%	54%	41%	47%	56%	55%
Economy	14%	9%	21%	17%	19%	12%	14%	16%	13%	13%	18%	0%	7%	15%	16%	19%	13%	6%
911	13%	9%	12%	13%	19%	29%	6%	6%	9%	27%	30%	16%	11%	11%	23%	20%	10%	10%
Competition	6%	7%	9%	16%	12%	5%	5%	2%	0%	4%	9%	0%	2%	7%	5%	6%	5%	8%
Too many courses	5%	6%	19%	8%	10%	5%	5%	2%	4%	3%	3%	0%	0%	6%	6%	3%	6%	6%
Renovations	5%	3%	2%	11%	10%	2%	5%	1%	13%	5%	3%	16%	5%	5%	6%	5%	4%	7%
Membership	4%	4%	7%	5%	12%	5%	3%	2%	0%	1%	3%	5%	2%	4%	4%	2%	4%	5%
Course condition	3%	1%	5%	6%	2%	2%	3%	2%	4%	4%	3%	0%	2%	3%	3%	2%	4%	2%
Other	2%	4%	2%	0%	7%	0%	0%	2%	4%	4%	3%	11%	2%	2%	5%	2%	3%	1%
Management	2%	6%	5%	2%	5%	0%	1%	1%	0%	1%	3%	0%	4%	2%	2%	2%	1%	3%
Golfer segment change	2%	1%	2%	3%	0%	0%	2%	1%	0%	4%	0%	0%	2%	2%	2%	2%	1%	2%
Tourism	1%	1%	0%	2%	2%	2%	1%	0%	4%	1%	3%	0%	0%	1%	2%	1%	1%	2%
Advertising/marketing	1%	0%	2%	3%	2%	0%	0%	0%	0%	0%	6%	0%	2%	0%	2%	1%	1%	0%
Discount rounds	1%	1%	0%	3%	0%	0%	1%	0%	0%	0%	6%	0%	2%	1%	0%	1%	0%	2%
Increased prices	1%	0%	0%	0%	0%	0%	0%	2%	0%	3%	3%	5%	2%	1%	0%	2%	0%	1%
Area growth	1%	0%	0%	2%	2%	0%	1%	2%	0%	0%	0%	0%	2%	1%	1%	0%	1%	0%
Added new course	0%	0%	0%	0%	0%	2%	0%	1%	0%	0%	0%	0%	2%	0%	0%	0%	0%	1%



Defining Climate Regions

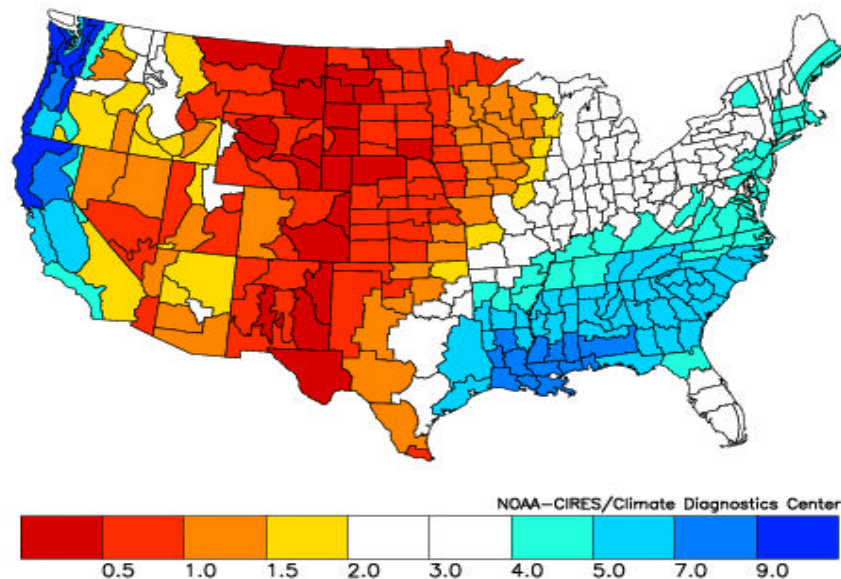
Climate (for golf purposes) can be defined by the number of comfortable play days a course sees in a year, taking into account temperature and precipitation. In the temperature map below, the red and orange shades represent the warmest areas of the U.S. where golf is played 12 months a year. Yellow and white represents a “transition” area, and green and blue represent areas of seasonal golf.

Composite Temperature Climatology (F) 1971–2000
Jan 1990 to 2000



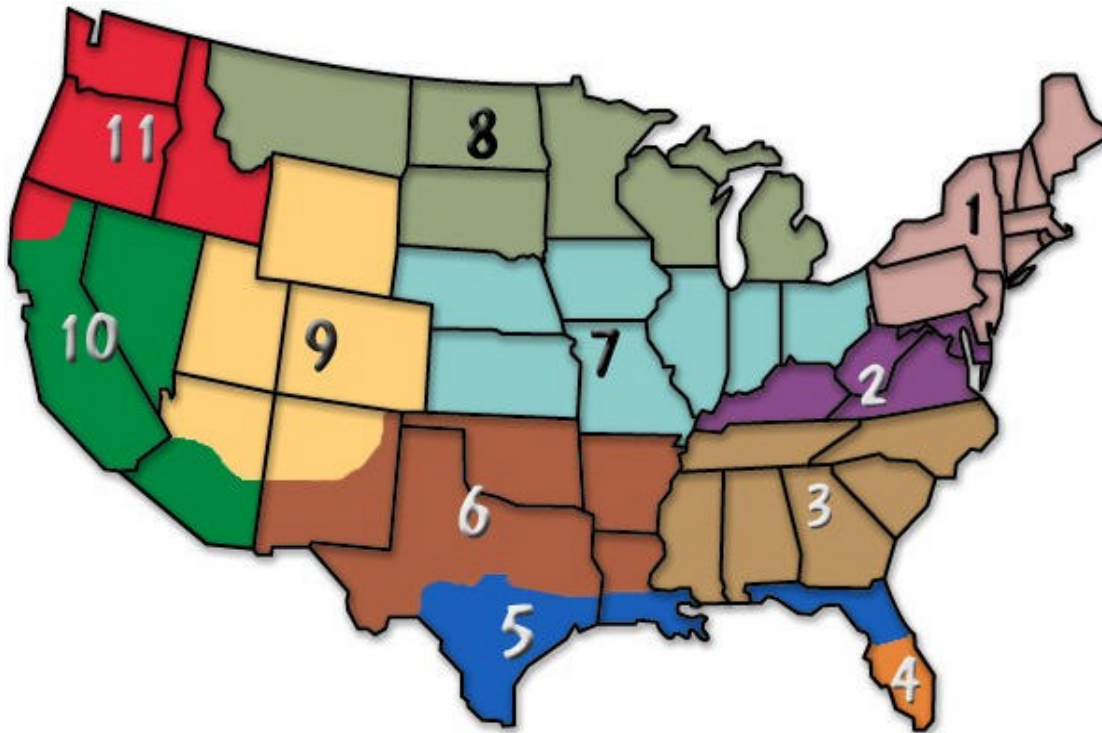
In the precipitation map below, blue and green represent the wettest areas of the United States, white represents moderate precipitation, and orange and red represent the driest.

Composite Precipitation (inches)
Jan 1990 to 2000





Based on the temperature and precipitation in the United States, eleven regions have been created to group facilities together based on proximity and length of golf season. These regions follow the demarcations of 2-digit ZIP Codes in the U.S., allowing operators to easily understand what climate region they are a part of.



Map Legend		
	Region Name	Included 2-digit ZIP Codes
Region 1	Northeast	1-18
Region 2	Mid Atlantic	19-26, 40-42
Region 3	Southeast	27-31, 35-39
Region 4	Central/South Florida	33-34
Region 5	Gulf Coast	32,70, 77-78
Region 6	South Central	71-76, 79, 88
Region 7	Lower Midwest	43-47, 50-52, 60-69
Region 8	Upper Midwest	48-49, 53-59
Region 9	Mountain	80-82, 84, 86-87
Region 10	Southwest	85, 89-91, 92-95, 99
Region 11	Northwest	83, 96-98



Sample Sizes and Response Rates

	Number of Facilities	Sample Size	Response Rate
United States	15,720	2,426	15.4%
Northeast	2,543	310	12.2%
Mid Atlantic	1,081	159	14.7%
Southeast	2,051	291	14.2%
Central/South Florida	776	145	18.7%
Gulf Coast	764	154	20.2%
South Central	943	100	10.6%
Lower Midwest	3,088	396	12.8%
Upper Midwest	2,109	269	12.8%
Mountain	439	97	22.1%
Southwest	1,290	390	30.2%
Northeast	636	115	18.1%