

Rounds Played in the United States
2003 Edition





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Research Overview

In January 2003, the National Golf Foundation mailed surveys to all of the nation's nearly 16,000 golf facilities in order to collect information regarding rounds and revenue for calendar year 2002 vs. 2001. About 2,300 facilities responded, for a response rate of 14 percent. Based on this sample size, the number of rounds played and revenues in the U.S. are accurate within +/- 2.0 percent.

Rounds Played

Total rounds played in the U.S. were 502.4 million in 2002 vs. 518.1 million in 2001, a decrease of 3.0 percent. Hardest hit regions were the Lower Midwest, the Southeast and Northeast regions with declines of about five percent. The difference in the decline of rounds by course access was negligible: public facilities showed a decrease of 3.0 percent vs. 3.2 percent for private. "Value" facilities fared somewhat worse than their higher-priced competitors, an indication that golfers still appreciate a high-quality golf experience even though they may have to spend more for it.

Decliners led advancers more than two to one. In other words, 61 percent of facilities posted declines in 2002 vs. 2001, 28 percent said they had more rounds and 11 percent stayed the same.

Revenue

Total revenue reported by facilities increased slightly – 0.9 percent – between 2001 and 2002, due to increases in rounds revenue (the sum of green fees, guest fees, golf car rentals, annual dues and trail fees) and food and beverage revenue. Meanwhile, merchandise revenue decreased.

Decliners led advancers, though not to the same extent as rounds played. Forty-nine percent reported lower revenues in 2002 vs. 2001, 39 percent said revenues were higher and 12 percent stayed the same.

Because of the decrease in rounds played, revenue per round figures increased between 2001 and 2002. For example, total revenue per round at public facilities was \$29.81 in 2001 and \$31.29 in 2002, an increase of 5.0 percent.

Reasons for Decreases/Increases

Facilities reporting a decrease in rounds between 2001 and 2002 cited factors beyond their control – weather, the economy and competition – as the main reasons for the decline. Those reporting an increase in rounds cited weather, improved course condition, enhanced advertising and marketing, and improved management as the main reasons for the increase.

Free Report

To download a free copy of *Rounds Played in the U.S., 2003 edition*, log on to www.ngf.org and click on the lower right hand corner of the screen.

Taking it Further

See the NGF's second quarter 2003 *Golf Facility Report* (member newsletter) for further interpretation and analysis of this report.



Rounds Played in the United States

	(Rounds in millions)			Percent Change 2001-2002
	2002	2001	2000	
Total U.S.	502.4	518.1	518.4	-3.0%
Region				
1. Northeast	67.6	71.1	69.4	-4.9%
2. Mid Atlantic	30.9	31.7	30.6	-2.5%
3. Southeast	62.5	65.8	64.8	-5.1%
4. Central/South Florida	36.6	36.5	35.4	0.3%
5. Gulf Coast	29.2	28.8	29.2	1.4%
6. South Central	32.5	32.5	32.2	-0.1%
7. Lower Midwest	85.6	90.5	92.3	-5.4%
8. Upper Midwest	52.6	55.0	58.3	-4.4%
9. Mountain	19.2	19.7	18.4	-2.3%
10. Southwest	64.4	64.5	65.0	-0.2%
11. Northwest	21.4	22.0	22.7	-2.7%
Facility Type				
9-Hole	113.7	117.6	123.4	-3.3%
18-Hole	300.5	310.7	306.9	-3.3%
27+ Hole	88.2	89.8	88.1	-1.8%
Access Type				
Public	377.4	388.9	390.1	-3.0%
Private	125.1	129.2	128.3	-3.2%
Price Point (1)				
Premium	106.1	110.1	106.7	-3.6%
Standard	222.8	226.2	229.0	-1.5%
Value	173.5	181.8	182.7	-4.5%

(1) For each region, facilities fall into one of three categories based on green fees:

Premium (High) – 80th-99th percentiles

Standard (Middle) – 40th-79th percentiles

Value (Low) – 1st-39th percentiles



Total Revenue

	(Dollars in billions)		
	2002	2001	Percent Change 2001-2002
Total U.S.	\$22.83	\$22.61	0.9%
Region			
1. Northeast	\$3.57	\$3.61	-1.3%
2. Mid Atlantic	\$1.48	\$1.42	4.0%
3. Southeast	\$2.88	\$2.96	-2.6%
4. Central/South Florida	\$2.39	\$2.26	5.6%
5. Gulf Coast	\$1.41	\$1.36	3.5%
6. South Central	\$1.29	\$1.29	0.0%
7. Lower Midwest	\$2.91	\$2.99	-2.8%
8. Upper Midwest	\$2.03	\$2.04	-0.5%
9. Mountain	\$0.62	\$0.60	3.3%
10. Southwest	\$3.39	\$3.24	4.7%
11. Northwest	\$0.86	\$0.83	3.3%
Facility Type			
9-Hole	\$2.52	\$2.54	-0.5%
18-Hole	\$15.17	\$15.00	1.1%
27+ Hole	\$5.14	\$5.08	1.2%
Access Type			
Public	\$11.99	\$11.77	1.8%
Private	\$10.84	\$10.84	0.0%
Price Point (1)			
Premium	\$7.92	\$8.01	-1.0%
Standard	\$9.71	\$9.43	3.1%
Value	\$5.19	\$5.18	0.1%

(1) See footnote on page 2.



Rounds Revenue

Rounds Revenue is the sum of green fees, guest fees, golf car rentals, annual dues and trail fees.

	(Dollars in billions)		
	2002	2001	Percent Change 2001-2002
Total U.S.	\$13.64	\$13.56	0.6%
Region			
1. Northeast	\$2.16	\$2.11	2.5%
2. Mid Atlantic	\$0.85	\$0.84	1.9%
3. Southeast	\$1.78	\$1.84	-3.4%
4. Central/South Florida	\$1.20	\$1.15	3.8%
5. Gulf Coast	\$0.83	\$0.81	2.1%
6. South Central	\$0.84	\$0.87	-2.6%
7. Lower Midwest	\$1.82	\$1.83	-0.4%
8. Upper Midwest	\$1.19	\$1.21	-1.5%
9. Mountain	\$0.42	\$0.41	4.7%
10. Southwest	\$2.03	\$2.00	1.4%
11. Northwest	\$0.52	\$0.50	3.3%
Facility Type			
9-Hole	\$1.43	\$1.38	3.2%
18-Hole	\$9.21	\$9.20	0.2%
27+ Hole	\$3.00	\$2.98	0.7%
Access Type			
Public	\$8.52	\$8.45	0.8%
Private	\$5.12	\$5.11	0.3%
Price Point (1)			
Premium	\$4.60	\$4.64	-0.9%
Standard	\$6.01	\$5.86	2.4%
Value	\$3.03	\$3.05	-0.6%

(1) See footnote on page 2.



Food and Beverage Revenue

	(Dollars in millions)		Percent Change 2001-2002
	2002	2001	
Total U.S.	\$6,041	\$5,935	1.8%
Region			
1. Northeast	\$1,049	\$1,009	4.0%
2. Mid Atlantic	\$406	\$391	3.8%
3. Southeast	\$716	\$712	0.5%
4. Central/South Florida	\$545	\$530	2.8%
5. Gulf Coast	\$323	\$305	5.9%
6. South Central	\$299	\$290	3.0%
7. Lower Midwest	\$750	\$745	0.7%
8. Upper Midwest	\$709	\$720	-1.5%
9. Mountain	\$154	\$154	0.1%
10. Southwest	\$832	\$834	-0.2%
11. Northwest	\$257	\$244	5.2%
Facility Type			
9-Hole	\$734	\$705	4.1%
18-Hole	\$3,986	\$3,934	1.3%
27+ Hole	\$1,321	\$1,297	1.9%
Access Type			
Public	\$2,391	\$2,259	5.8%
Private	\$3,650	\$3,676	-0.7%
Price Point (1)			
Premium	\$2,102	\$2,071	1.5%
Standard	\$2,576	\$2,514	2.5%
Value	\$1,362	\$1,350	0.9%

(1) See footnote on page 2.



Merchandise Revenue

	(Dollars in millions)		Percent Change 2001-2002
	2002	2001	
Total U.S.	\$2,249	\$2,270	-0.9%
Region			
1. Northeast	\$342	\$331	3.5%
2. Mid Atlantic	\$129	\$131	-1.3%
3. Southeast	\$291	\$309	-5.7%
4. Central/South Florida	\$174	\$170	2.3%
5. Gulf Coast	\$140	\$138	1.7%
6. South Central	\$157	\$162	-3.3%
7. Lower Midwest	\$287	\$285	0.7%
8. Upper Midwest	\$167	\$166	0.8%
9. Mountain	\$75	\$78	-3.7%
10. Southwest	\$355	\$372	-4.5%
11. Northwest	\$132	\$129	2.6%
Facility Type			
9-Hole	\$285	\$287	-0.6%
18-Hole	\$1,464	\$1,497	-2.2%
27+ Hole	\$500	\$486	2.8%
Access Type			
Public	\$1,219	\$1,217	0.2%
Private	\$1,031	\$1,053	-2.1%
Price Point (1)			
Premium	\$776	\$783	-1.0%
Standard	\$942	\$944	-0.2%
Value	\$532	\$542	-1.9%

(1) See footnote on page 2.



Total Revenue per Round

(Total revenue divided by total rounds.)

	2002	2001	Percent Change 2001-2002
Total U.S.	\$45.43	\$43.65	4.1%
Region			
1. Northeast	\$52.41	\$50.48	3.8%
2. Mid Atlantic	\$47.52	\$44.55	6.7%
3. Southeast	\$45.84	\$44.68	2.6%
4. Central/South Florida	\$64.89	\$61.59	5.3%
5. Gulf Coast	\$47.77	\$46.82	2.0%
6. South Central	\$39.45	\$39.37	0.2%
7. Lower Midwest	\$33.72	\$32.80	2.8%
8. Upper Midwest	\$38.36	\$36.86	4.1%
9. Mountain	\$32.04	\$30.29	5.8%
10. Southwest	\$52.33	\$49.89	4.9%
11. Northwest	\$39.80	\$37.45	6.3%
Facility Type			
9-Hole	\$21.58	\$20.97	2.9%
18-Hole	\$49.08	\$46.96	4.5%
27+ Hole	\$56.66	\$55.00	3.0%
Access Type			
Public	\$31.29	\$29.81	5.0%
Private	\$85.33	\$82.61	3.3%
Price Point (1)			
Premium	\$73.47	\$71.52	2.7%
Standard	\$42.91	\$40.98	4.7%
Value	\$29.42	\$28.03	5.0%

(1) See footnote on page 2.



Rounds Revenue per Round

(Rounds revenue divided by total rounds.)

Rounds revenue is the sum of green fees, guest fees,
golf car rentals, annual dues and trail fees.

	2002	2001	Percent Change 2001-2002
Total U.S.	\$27.15	\$26.17	3.7%
Region			
1. Northeast	\$31.83	\$29.51	7.9%
2. Mid Atlantic	\$27.40	\$26.20	4.6%
3. Southeast	\$28.30	\$27.78	1.9%
4. Central/South Florida	\$32.54	\$31.39	3.7%
5. Gulf Coast	\$28.09	\$27.89	0.7%
6. South Central	\$25.86	\$26.50	-2.4%
7. Lower Midwest	\$21.16	\$20.09	5.4%
8. Upper Midwest	\$22.56	\$21.88	3.1%
9. Mountain	\$21.95	\$20.46	7.2%
10. Southwest	\$31.29	\$30.78	1.7%
11. Northwest	\$24.08	\$22.65	6.3%
Facility Type			
9-Hole	\$12.19	\$11.41	6.8%
18-Hole	\$29.78	\$28.73	3.6%
27+ Hole	\$33.06	\$32.22	2.6%
Access Type			
Public	\$22.38	\$21.54	3.9%
Private	\$40.60	\$39.18	3.6%
Price Point (1)			
Premium	\$42.64	\$41.44	2.9%
Standard	\$26.52	\$25.49	4.0%
Value	\$17.19	\$16.50	4.1%

(1) See footnote on page 2.



Food and Beverage Revenue per Round

(Food and beverage revenue divided by total rounds.)

	2002	2001	Percent Change 2001-2002
Total U.S.	\$12.02	\$11.46	4.9%
Region			
1. Northeast	\$15.42	\$14.09	9.4%
2. Mid Atlantic	\$13.05	\$12.25	6.6%
3. Southeast	\$11.39	\$10.75	6.0%
4. Central/South Florida	\$14.80	\$14.42	2.7%
5. Gulf Coast	\$10.98	\$10.51	4.5%
6. South Central	\$9.15	\$8.87	3.2%
7. Lower Midwest	\$8.71	\$8.18	6.5%
8. Upper Midwest	\$13.40	\$13.00	3.1%
9. Mountain	\$7.94	\$7.74	2.6%
10. Southwest	\$12.85	\$12.84	0.1%
11. Northwest	\$11.92	\$11.01	8.2%
Facility Type			
9-Hole	\$6.29	\$5.84	7.7%
18-Hole	\$12.94	\$12.34	4.9%
27+ Hole	\$14.60	\$14.07	3.8%
Access Type			
Public	\$6.19	\$5.67	9.2%
Private	\$28.50	\$27.76	2.7%
Price Point (1)			
Premium	\$19.49	\$18.49	5.4%
Standard	\$11.38	\$10.93	4.1%
Value	\$7.72	\$7.30	5.7%

(1) See footnote on page 2.



Merchandise Revenue per Round

(Merchandise revenue divided by total rounds.)

	2002	2001	Percent Change 2001-2002
Total U.S.	\$4.48	\$4.38	2.2%
Region			
1. Northeast	\$5.06	\$4.65	8.9%
2. Mid Atlantic	\$4.17	\$4.12	1.4%
3. Southeast	\$4.66	\$4.68	-0.6%
4. Central/South Florida	\$4.75	\$4.65	2.1%
5. Gulf Coast	\$4.79	\$4.78	0.3%
6. South Central	\$4.84	\$4.99	-3.1%
7. Lower Midwest	\$3.35	\$3.14	6.5%
8. Upper Midwest	\$3.17	\$3.01	5.5%
9. Mountain	\$3.92	\$3.97	-1.3%
10. Southwest	\$5.51	\$5.76	-4.3%
11. Northwest	\$6.18	\$5.86	5.6%
Facility Type			
9-Hole	\$2.45	\$2.38	2.8%
18-Hole	\$4.76	\$4.70	1.1%
27+ Hole	\$5.53	\$5.28	4.7%
Access Type			
Public	\$3.18	\$3.08	3.2%
Private	\$8.12	\$8.03	1.2%
Price Point (1)			
Premium	\$7.20	\$7.01	2.8%
Standard	\$4.16	\$4.11	1.3%
Value	\$3.02	\$2.94	2.8%

(1) See footnote on page 2.



Reasons for Increasing Rounds

	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
Weather	33%	50%	50%	9%	3%	35%	30%	27%	48%	47%	30%	39%	44%	28%	32%	23%	30%	39%
Course conditions	16	17	4	23	9	24	39	15	7	21	11	4	16	16	15	12	18	15
Advertising/marketing	14	14	10	30	12	17	6	6	18	9	17	6	12	16	6	16	18	10
Management	10	8	5	9	8	27	3	14	5	22	4	7	7	12	1	9	12	9
Golfer segment change	9	6	18	6	34	14	0	9	5	0	4	12	9	8	15	3	7	14
Membership	7	2	0	12	14	8	8	7	9	0	12	0	0	10	4	11	9	4
Discount rounds	6	2	13	9	3	0	0	5	8	0	14	4	5	6	5	12	4	4
Renovations	5	6	0	8	4	6	4	4	10	0	7	4	3	7	1	6	9	2
Area growth	4	2	8	2	12	3	0	1	0	4	3	13	3	4	3	2	5	4
Increased prices	2	0	11	0	0	0	0	5	2	0	1	0	7	0	0	1	0	4
Competition	2	1	0	2	9	2	0	0	0	3	0	13	3	2	2	2	1	3
9/11	1	3	0	0	3	5	0	0	2	0	3	0	0	2	2	4	2	0
Economy	1	3	0	0	0	4	0	0	2	8	0	0	0	2	0	4	2	0
Tourism	1	0	0	5	0	0	0	0	0	0	3	0	0	1	1	0	0	1
Too many courses	0	0	2	0	0	0	0	0	0	0	0	0	0	0	1	1	0	0



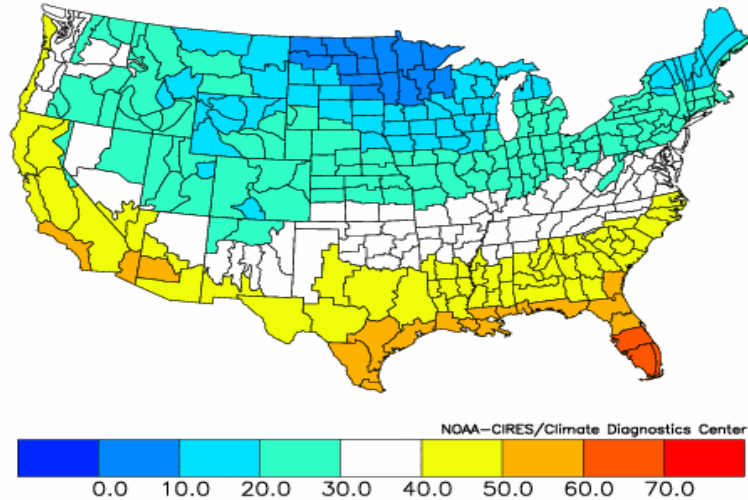
Reasons for Decreasing Rounds

	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
Weather	62%	80%	67%	40%	30%	56%	19%	74%	82%	61%	12%	45%	65%	61%	59%	63%	62%	60%
Economy	41	32	31	60	46	34	43	42	34	45	39	46	38	41	44	54	40	36
Competition	15	15	11	13	26	16	22	14	14	4	16	16	18	13	17	14	14	16
Too many courses	8	3	6	15	7	4	10	8	7	8	14	1	3	9	11	9	10	4
Membership	6	8	9	6	10	3	3	4	6	0	6	4	3	6	8	4	6	6
Renovations	5	2	12	7	13	15	9	5	1	10	4	1	4	6	2	3	6	6
9/11	3	2	5	1	18	2	6	0	1	5	13	1	3	3	6	2	4	3
Course conditions	3	3	5	4	3	0	11	1	1	18	2	1	2	3	5	3	4	2
Golfer segment change	2	3	0	2	7	2	0	1	0	0	10	2	0	3	4	2	2	2
Increased prices	2	3	0	2	1	4	0	3	0	0	3	3	4	1	2	1	2	2
Management	1	2	3	0	0	2	16	0	0	0	3	0	2	1	1	1	1	2
Tourism	1	0	1	2	2	3	0	0	0	3	6	1	0	1	3	3	2	0
Discount rounds	0	0	0	0	0	0	0	1	0	0	1	0	0	0	0	1	0	0
Advertising/marketing	0	0	0	0	0	0	0	0	0	0	1	1	0	0	0	0	0	0

Defining Climate Regions

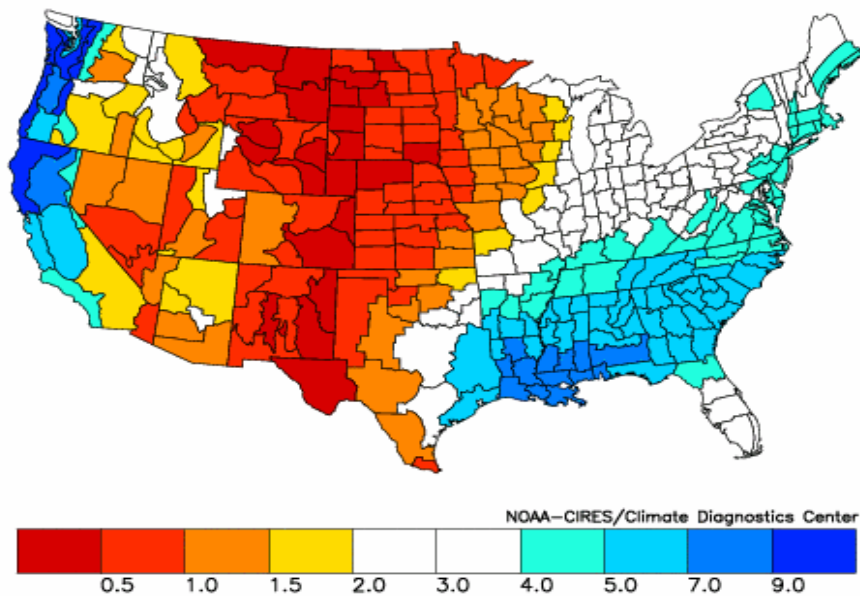
Climate (for golf purposes) can be defined by the number of comfortable play days a course sees in a year, taking into account temperature and precipitation. In the temperature map below, the red and orange shades represent the warmest areas of the U.S. where golf is played 12 months a year. Yellow and 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 temperature and precipitation in the U.S., 11 regions have been created to group facilities together. These regions follow the demarcations of 2-digit ZIP Codes in the U.S. (first two digits of ZIP code), allowing operators to easily understand what climate region they fall into.



Map Legend

	Region Name	2-digit ZIP Codes Included
Region 1	Northeast	01-18
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, 89-96
Region 11	Northwest	83, 97-99