

Rounds Played in the United States

2004 Edition



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Research Overview

In January-February 2004, the National Golf Foundation conducted an online survey of U.S. golf facilities in order to collect rounds data for calendar year 2003 vs. 2002. About 1,900 facilities responded. Here are the sample sizes:

| | Sample size |
|-----------------------|--------------|
| Northeast | 222 |
| Mid Atlantic | 166 |
| Southeast | 254 |
| Central/South Florida | 94 |
| Gulf Coast | 112 |
| South Central | 99 |
| Lower Midwest | 304 |
| Upper Midwest | 208 |
| Mountain | 113 |
| Southwest | 198 |
| Northwest | 79 |
| Total | 1,849 |

| | Sample size |
|--------------|--------------|
| 9 holes | 148 |
| 18 holes | 1,434 |
| 27+ holes | 267 |
| Total | 1,849 |

| | Sample size |
|--------------|--------------|
| Public | 1,182 |
| Private | 667 |
| Total | 1,849 |

Summary 2003

Total rounds played in the U.S. were 495 million in 2003 vs. 502 million in 2002, a decrease of 1.5 percent. Adding the three percent decrease of 2002, there has been a cumulative 4.5 percent decrease since 2001. Hardest hit regions in 2003 were the Northeast and Mid Atlantic regions which had near-record precipitation. Regions faring better in 2003 were the Gulf Coast, South Central and Upper Midwest.

Decliners continued to outpace advancers – 55 percent of facilities posted decreases this year vs. 61 percent last year. However, on a bright note, the percentage of advancers increased from 28 percent to 38 percent.

| | Advancers | Decliners | Stayed same |
|---------------|-----------|-----------|-------------|
| 2003 vs. 2002 | 38% | 55% | 7% |
| 2002 vs. 2001 | 28% | 61% | 11% |

Reasons for Increases in Rounds

Operators posting an increase in rounds cited better weather, but also improved course conditions, better or increased advertising and marketing, improvement in the economy and better management.

| Reasons for increased rounds 2003 vs. 2002 | Percent of facilities |
|--|-----------------------|
| Weather | 35% |
| Course conditions | 33% |
| Advertising/marketing | 29% |
| Increase in membership | 21% |
| Discount rounds | 19% |
| Economy | 19% |
| Management | 17% |
| Area growth | 15% |
| Renovations | 11% |

Reasons for Decreases in Rounds

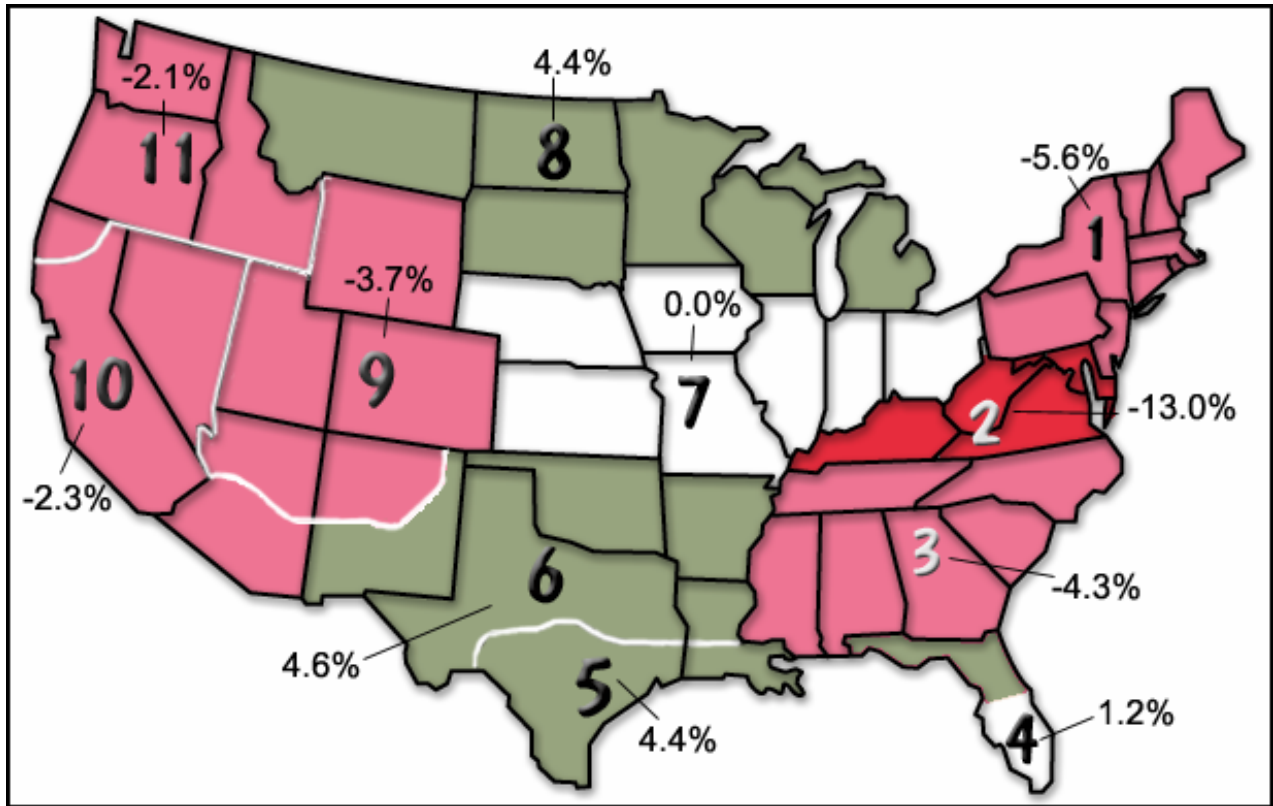
Facilities posting decreases cited poor weather as the primary reason (62%). In fact, where rounds were down the most – in the Northeast and Mid Atlantic – the percentage citing weather was much higher: 85% and 83%, respectively.

| Reasons for decreased rounds 2003 vs. 2002 | Percent of facilities |
|--|-----------------------|
| Weather | 62% |
| Economy | 55% |
| Competition | 31% |
| Too many courses | 29% |
| Decrease in membership | 20% |
| Course conditions | 10% |

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Percent Change in Rounds 2002-2003



The map below shows the regional boundary lines.



| Rounds Played in the United States | |
|---|-------------------------------------|
| | Percent Change 2002-2003 |
| Total U.S. | -1.5% |
| Facility Size | |
| 9-Hole | -1.1% |
| 18-Hole | -1.3% |
| 27+ Hole | -2.7% |
| Access Type | |
| Public | -1.0% |
| Private | -3.0% |
| Price Point - Public (1) | |
| Premium | 0.3% |
| Standard | -2.7% |
| Value | 0.3% |

(1) For public access, by 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

Reasons for Increasing Rounds

| | | Region | | | | | | | | | | |
|------------------------|-------|-----------|--------------|-----------|-----------------------|------------|---------------|---------------|---------------|----------|-----------|-----------|
| | Total | Northeast | Mid Atlantic | Southeast | Central/South Florida | Gulf Coast | South Central | Lower Midwest | Upper Midwest | Mountain | Southwest | Northwest |
| Weather | 35% | 34% | 26% | 44% | 18% | 29% | 29% | 46% | 54% | 22% | 10% | 25% |
| Course conditions | 33% | 20% | 34% | 38% | 48% | 33% | 27% | 31% | 34% | 29% | 32% | 31% |
| Advertising/marketing | 29% | 27% | 31% | 31% | 33% | 22% | 13% | 31% | 30% | 22% | 37% | 34% |
| Increase in membership | 21% | 20% | 11% | 27% | 25% | 16% | 22% | 23% | 18% | 15% | 32% | 3% |
| Discount rounds | 19% | 11% | 17% | 14% | 3% | 18% | 13% | 26% | 19% | 15% | 28% | 25% |
| Economy | 19% | 18% | 20% | 14% | 15% | 22% | 9% | 20% | 22% | 15% | 20% | 22% |
| Management | 17% | 5% | 11% | 31% | 28% | 20% | 16% | 15% | 16% | 15% | 14% | 9% |
| Area growth | 15% | 2% | 26% | 7% | 38% | 20% | 7% | 17% | 13% | 5% | 21% | 16% |
| Renovations | 11% | 7% | 11% | 15% | 15% | 9% | 7% | 10% | 10% | 5% | 18% | 16% |
| Competition | 7% | 0% | 3% | 10% | 5% | 5% | 2% | 10% | 6% | 5% | 11% | 6% |
| Tourism | 5% | 2% | 3% | 8% | 20% | 5% | 0% | 2% | 2% | 5% | 11% | 6% |
| Too many courses | 4% | 0% | 3% | 2% | 0% | 4% | 0% | 8% | 6% | 0% | 4% | 3% |
| Increased prices | 3% | 0% | 3% | 4% | 3% | 4% | 4% | 2% | 2% | 5% | 7% | 3% |
| Decrease in membership | 2% | 2% | 3% | 1% | 0% | 2% | 0% | 5% | 3% | 2% | 0% | 3% |

Reasons for Decreasing Rounds

| | Total | Region | | | | | | | | | | |
|------------------------|-------|-----------|--------------|-----------|-----------------------|------------|---------------|---------------|---------------|----------|-----------|-----------|
| | | Northeast | Mid Atlantic | Southeast | Central/South Florida | Gulf Coast | South Central | Lower Midwest | Upper Midwest | Mountain | Southwest | Northwest |
| Weather | 62% | 85% | 83% | 64% | 32% | 56% | 40% | 63% | 55% | 61% | 30% | 59% |
| Economy | 55% | 49% | 46% | 58% | 58% | 50% | 50% | 59% | 60% | 64% | 59% | 51% |
| Competition | 31% | 21% | 28% | 26% | 34% | 24% | 31% | 39% | 42% | 28% | 44% | 24% |
| Too many courses | 29% | 18% | 28% | 24% | 32% | 20% | 31% | 34% | 38% | 34% | 38% | 27% |
| Decrease in membership | 20% | 20% | 16% | 24% | 24% | 26% | 24% | 21% | 23% | 8% | 17% | 15% |
| Course conditions | 10% | 9% | 10% | 11% | 16% | 12% | 12% | 5% | 5% | 19% | 9% | 7% |
| Discount rounds | 6% | 2% | 3% | 4% | 8% | 4% | 10% | 8% | 3% | 8% | 15% | 7% |
| Tourism | 5% | 3% | 2% | 1% | 12% | 6% | 5% | 1% | 5% | 9% | 19% | 10% |
| Increased prices | 5% | 2% | 3% | 4% | 2% | 2% | 2% | 6% | 8% | 9% | 5% | 10% |
| Renovations | 5% | 4% | 3% | 6% | 10% | 4% | 7% | 4% | 5% | 5% | 5% | 0% |
| Area growth | 4% | 2% | 6% | 3% | 10% | 0% | 7% | 4% | 5% | 3% | 5% | 0% |
| Management | 3% | 1% | 2% | 2% | 4% | 8% | 5% | 3% | 3% | 3% | 3% | 7% |
| Advertising/marketing | 3% | 3% | 3% | 3% | 4% | 4% | 0% | 3% | 2% | 3% | 4% | 0% |
| Increase in membership | 1% | 0% | 0% | 1% | 0% | 0% | 0% | 3% | 5% | 2% | 1% | 2% |