**Golf Industry 2022**

**Spring 2021 Surge Increased Rounds Played for the Year**

Golf continued to be considered a safe outdoor activity during 2021 for many people. The National Golf Foundation (NGF) reports YOY double-digit increases for rounds played during March (+45.3%), April (+81.5%) and May (+18.1%).

As the COVID-19 Omicron variant surged during the fall, October’s rounds played decreased by 1.8% and November’s by 17.6%, but December’s increased by 1.1%. For the entire year, rounds played increased by 5.5%.

Rounds played on public courses during 2021 increased 6.7%; however, rounds played at private clubs/courses increased just 1.1% after increasing 19.9% during 2020. Public golfers, on average, play almost four times as many rounds as private club players.

**Change in 2021 National Golf Rounds Played, by Regions**

|  |  |  |  |
| --- | --- | --- | --- |
| Region | Change\* | Region | Change\* |
| New England | * +2.3% | * West North Central | * +3.5% |
| Mid-Atlantic | * +6.7% | * Mountain | * +2.5% |
| South Atlantic | * +5.8% | * Pacific | * +13.9% |
| South Central | * +1.3% | * Year-to-Date | * +5.5% |
| East North Central | * +5.7% |  |  |

National Golf Foundation, February 2022 \*from 2020

**Golfers Are Ready to Play During 2022**

For the first three months of 2022, rounds played during January decreased by 12.1% YOY, probably because the Omicron variant was still strong. February’s rounds played increased by 13.0% YOY, but March’s decreased by 14.3%, possibly affected by inflation.

According to Sports & Leisure Research Group’s Golf Market Trends 2022 report, 33% of all surveyed golfers said they expect to play more during 2022 than 2021, with “casual” golfers at 28%, “core” golfers at 25% and “avid” golfers at 44%.

77% of surveyed golfers agreed “golf has become a more welcoming sport” while 73% said, “nine-hole rounds of golf have become more attractive to me of late” and 69% said, “more people working from home has increased the amount of golf being played.”

**Why Golfer Say More People Are Playing Golf, January 2022**

|  |  |
| --- | --- |
| Reason | Percent |
| Golf is a safe activity during the pandemic | * 64% |
| Golf fills a void of available social activities | * 54% |
| Golf courses have done a great job of promoting the game | * 54% |
| The most passionate players are valuing the sport even more than during trying times | * 50% |
| People have more time on their hands in general | * 48% |
| People who don’t normally play golf are seeking it as a form of exercise | * 36% |

Sports & Leisure Research Group, March 2022

**Keeping the Beginners on the Course**

The industry is certainly pleased the total number of beginner golfers increased by 3.2 million during 2021 after increasing by 3.0 million during 2020; however, for many years, the challenge has been how to keep more of those golfers on the course.

According to the NGF, there have been 13.9 million new golfers during the 2017–2021 period, but the total of on-course golfers has remained relatively the same from 23.8 million during 2017 to 25.1 million during 2021. Approximately 27% only continue to play.

Private clubs have been making more of an effort to grow the game, according to the Sports & Leisure Research Group report. It found 62% of private clubs have emphasized women’s programs during 2022, compared to 49% during 2021.

**Total Beginner Golfers and Men and Women, 2017–2021**

|  |  |  |  |
| --- | --- | --- | --- |
| Year | Total | Men | Women |
| 2017 | * 2.6 M | * 65% | * 35% |
| 2018 | * 2.6 M | * 69% | * 31% |
| 2019 | * 2.5 M | * 60% | * 31% |
| 2020 | * 3.0 M | * 64% | * 36% |
| 2021 | * 3.2 M | * 63% | * 37% |

National Golf Foundation, March 2022 (color represents change from the previous year)

**Summer 2022 Travel Outlook Should Be Good for Golf**

According to multiple sources, Americans are eager to travel during summer 2022, which should have a positive effect on golf trips. A February 2022 Morning Consult survey found 60% of all US adults were “somewhat” or “very” comfortable taking a vacation.

The results of a 2022 NGF survey of 75 US golf resorts indicate 2022 advanced bookings for golf trips have increased 12% YOY and almost 20%, compared to 2019.

Maybe, a more important result of the survey is 82% of core golfers (play eight more rounds per year) told NGF they were planning at least one golf-related trip during 2022, a 67% increase from 2021 and the equivalent of more than 10 million golfers.

**Americans’ Plans for a Summer 2022 Road Trip, March 2022**

|  |  |
| --- | --- |
| Road Trip Plans | * Percent |
| Yes, within 100 miles of my home | * 18.70% |
| Yes, within 250 miles of my home | * 21.35% |
| Yes, within 500 miles of my home | * 21.53% |
| Yes, within 1,000 miles of my home | * 11.59% |
| Yes, more than 1,000 miles from my home | * 6.75% |
| No | * 20.07% |

The Vacationer (Survey Monkey), April 2022

**Golf Equipment & Apparel Purchases Remain Strong**

According to the Sports & Leisure Research Group report, the demand for seven of 10 golf equipment and apparel categories remains similar to 2021, which was one of the best years for equipment/apparel sales. Demand has increased for drivers, putters and apparel.

Among all golfers surveyed for the 2022 report, 49% said they expected to spend more for equipment and apparel than they did during 2021. Of three golfer profiles, 59% of avid golfers, 47% of core golfers and 41% of casual golfers said they would spend more.

Golfers’ sentiments about the equipment market in the 2022 survey remain strong, with two percent more (59%) than last year’s survey (57%) saying “new golf equipment continues to become more technologically innovative every year.”

**Golfers’ Equipment Purchasing Intent for 2022, by Golfer Profilers, January 2022**

|  |  |  |  |
| --- | --- | --- | --- |
| Purchase Intent | Core Golfers | Casual Golfers | Avid Golfers |
| 2022 purchases will be approximately the same as 2021 | * 45% | * 39% | * 33% |
| More 2022 purchases than 2021 | * 22% | * 15% | * 38% |
| No 2021 purchases, but plan 2022 purchases | * 16% | * 7% | * 9% |
| Fewer 2022 purchases than 2021 | * 10% | * 7% | * 13% |
| No 2021 purchases and no 2022 purchases anticipated | * 6% | * 33% | * 7% |

Sports & Leisure Research Group, March 2022 (color represents change from the previous year)

**Golfer Insights**

Data from The Media Audit’s 2021 Aggregate Report of 49 consumer/market surveys indicates golf is still an activity for older adults (average age 48.8 years) and affluent adults (average household income of $90,100) who played 3+ times during the past year.

The affluence of golfers who played 3+ times during the past year is even more evident as the data shows those with household incomes of $100,000 to $149,999 over-indexed at 129 and those with household incomes of $150,000 or more over-indexed at 215.

Although private clubs have made positive efforts to welcome more women to the game, The Media Audit report shows those adults 18+ who played 3+ times during the past year were predominately men at 75.5%, with women the other 24.5%.

**Indices of US Adults and Their Participation in**

**Golf as a Player and a Fan, by Generation, 2021**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Participation/Fan | Gen Z | Millennials | Gen X | Baby Boomers | Silent Generation |
| Played golf 3+ times\* | * 85 | * 88 | * 103 | * 109 | 108 |
| Sports fan of golf | * 31 | * 65 | * 102 | * 141 | * 183 |
| Attended golf event\* | * 55 | * 106 | * 131 | * 94 | * 52 |
| Watched golf on TV\* | * 24 | * 53 | * 102 | * 152 | * 202 |
| Listened to golf on radio\* | * 75 | * 148 | * 129 | * 50 | * 22 |
| Watched/Listened to golf via live stream\* | * 61 | * 123 | * 122 | * 76 | * 45 |

Based on The Media Audit’s 49-Market 2021 Aggregate Survey \*during the past 12 months

**More Valuable Insights**

The Media Audit’s 2021 Aggregate Report of 49 consumer/market surveys also provides some interesting insights and contrasts in terms of adults 18+ who played golf 3+ times during the past 12 months and their heavy exposure to media.

As it has been for decades, these golfers who are Baby Boomers and members of the Silent Generation, over-indexed for heavy exposure to TV while younger adults, Gen Zers, Millennials and Gen Xers, unsurprisingly, under-indexed. Somewhat unexpected, however, these younger adult golfers over-indexed for heavy exposure to radio while older golfers under-indexed.

More surprising results from the data are younger golfers over-indexed for newspaper more than older adults and generally had larger indices for outdoor and direct mail. Young adult golfers, as expected, over-indexed for heavy exposure to the Internet and social media while older golfers under-indexed significantly.

**Indices of US Adults Who Played Golf 3+Time During the Past 12**

**Months and Their Heavy Exposure to Media, by Generation, 2021**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Media | Gen Z | Millennials | Gen X | Baby Boomers | Silent Generation |
| Radio (180+ minutes during average day) | * 100 | * 148 | * 118 | * 64 | 24 |
| TV (300+ minutes during average day) | * 62 | * 85 | * 94 | * 112 | * 171 |
| Newspapers (60+ minutes during average day) | * 111 | * 130 | * 100 | * 75 | * 89 |
| Outdoor (200+ miles during average week) | * 83 | * 96 | * 117 | * 104 | * 72 |
| Internet (180+ minutes during average day) | * 114 | * 129 | * 107 | * 75 | * 47 |
| Social media (180+ minutes during average day) | * 225 | * 171 | * 88 | * 24 | * 28 |

Based on The Media Audit’s 49-Market 2021 Aggregate Survey

*Sources:* National Golf Foundation Website, 5/22; Sports & Leisure Research Group Website, 5/22; Morning Consult Website, 5/22; The Vacationer Website, 5/22; The Media Audit Website, 5/22.

*Updated*: May 2022

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**Local Market and Station Information**