



THE NEW Consumer
Insights Study
January 2024

ERA OF GOLF

PUTTING MORE GOLFERS ON FAIRWAYS

Golf, the sport we all love, has never been more popular. **Total U.S. golf participation eclipsed 40 million for the first time in 2022**, while more than a third of the total U.S. population played, watched, read about, or engaged with golf content on social media*.

Golf participation has been riding a wave of momentum since the 2020 Covid boom, setting all-time records. It's not only enjoying a steady increase in the number of golfers, but also significant bumps in first-timers, people returning to the game, and across various demographics **from women and juniors to diverse populations**. No matter their skill level, people love the shared experience with friends and family that golf delivers.

In this new era of golf, golfers are adopting technology in record numbers. We're not only talking about advances in equipment and training tools, but also in the ways that golf courses are using technology to help more golfers connect with their passion. **Millions of rounds that would have been booked over the telephone or at the pro shop are now being booked online or via mobile apps** with providers like GolfNow – **a more than 40% increase since 2019**** and it is increasing every year.

With a desire to continue this momentum, we at GolfNow wanted to know more about today's golfer and share our learnings with the industry. Between October 19-30, 2023, we worked with an outside market research company and **surveyed more than 4,000 golfers across the country** to better understand:



Their attitudes and behaviors



What factors influence why they play golf



How much golf they plan to play in the future



What motivates them to play more

While the results we share come from a wide range of golfers from all corners of the country, we also discovered that nearly 20% of the respondents also are GolfNow users, which illustrates some interesting comparisons. **GolfNow is the largest online tee-time marketplace, serving 11,000+ golf courses and millions of golfers around the globe.**

*source: National Golf Foundation

**source: GolfNow

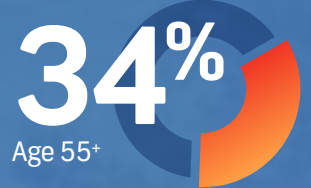
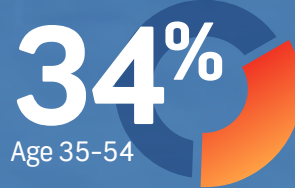
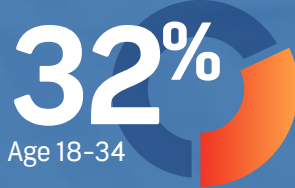
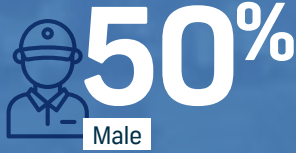


WHO WE TALKED TO

SURVEY PARTICIPANT DEMOGRAPHICS

4,000+

Golfers surveyed
20% are GolfNow users

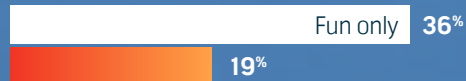


49% reported having a household income under \$60,000, **29%** between \$60,000-\$99,000, and **22%** \$100K+

38% live in the South; **23%** Midwest; **20%** West; **19%** Northeast

67% of all golfers surveyed have been playing golf for 4+ years, increasing to **74%** among GolfNow users

HOW SURVEY RESPONDENTS DESCRIBED THEIR GOLFING PERSONA



Golfers
 GolfNow users

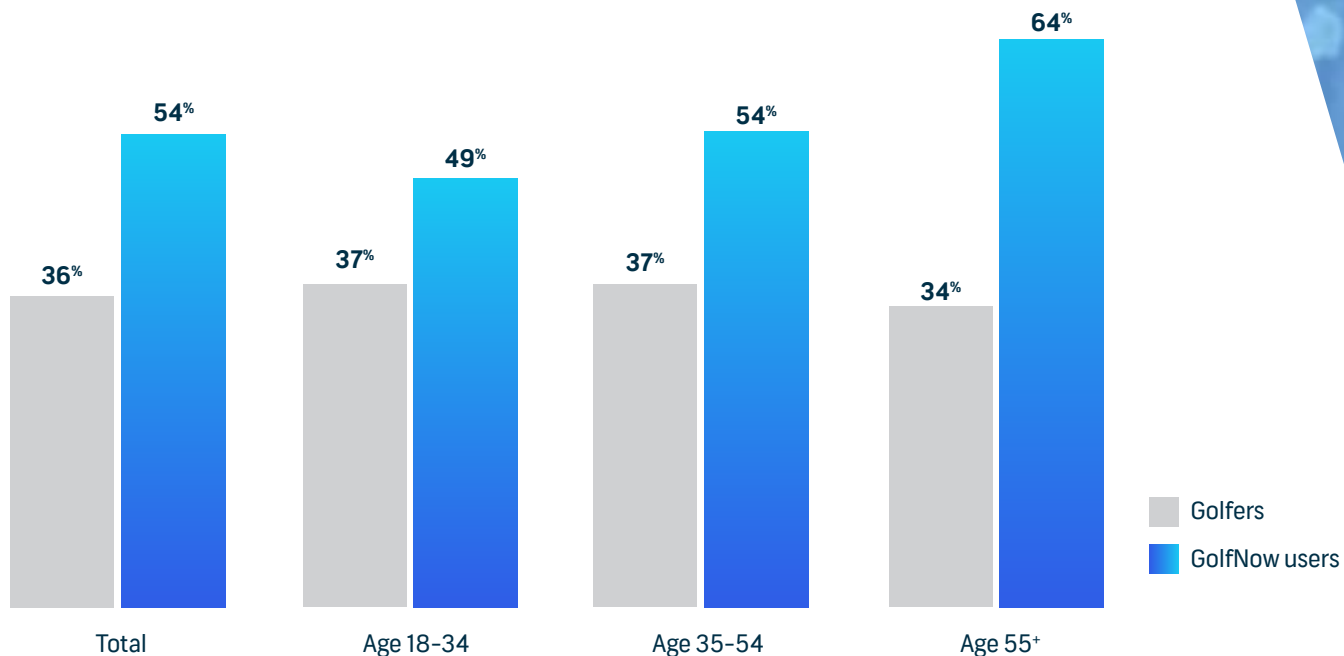


GOLFERS' BEHAVIORS ON AND OFF THE COURSE

HOW MUCH THEY PLAYED OVER THE PAST YEAR

Over a third of the 4,000+ golfers we surveyed said they played at least 5 rounds of golf during the past year. This number increases to over half among GolfNow users.

% WHO PLAYED 5+ ROUNDS OF GOLF IN THE PAST YEAR



5 ROUNDS

36% of golfers surveyed played at least 5 rounds of golf the past year, increasing to 54% for GolfNow users.



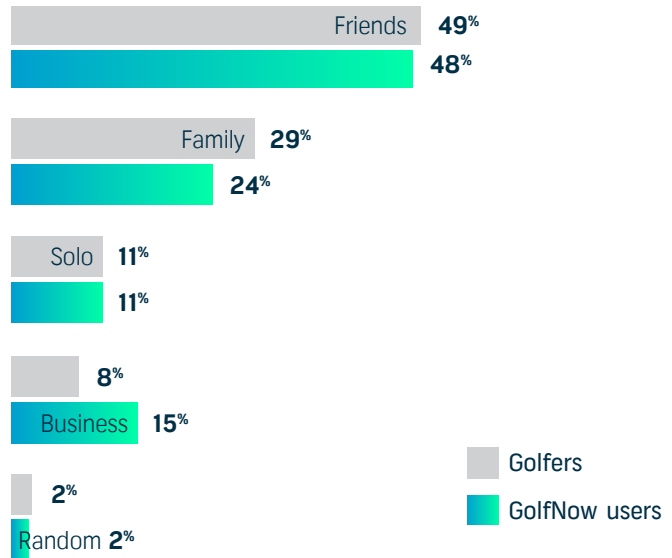
GOLFERS' BEHAVIORS ON AND OFF THE COURSE

WHO THEY PLAYED GOLF WITH

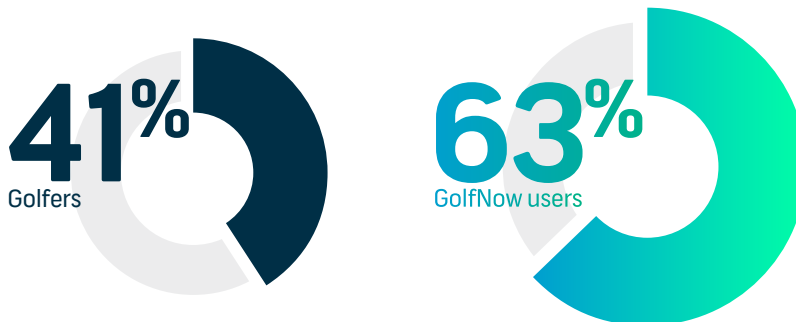
Golf is a shared experience and golfers primarily play with their **friends or family members**. GolfNow users are more likely than the general golfing public to play with business associates or business prospects.

49%

of the 4,000+ golfers surveyed played primarily with friends



Nearly half of golfers reported making money wagers when playing with golf companions. This number increases to nearly two-thirds among GolfNow users.



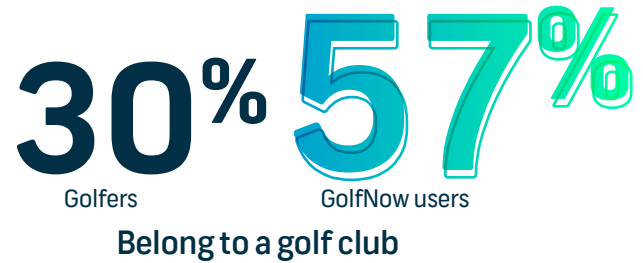
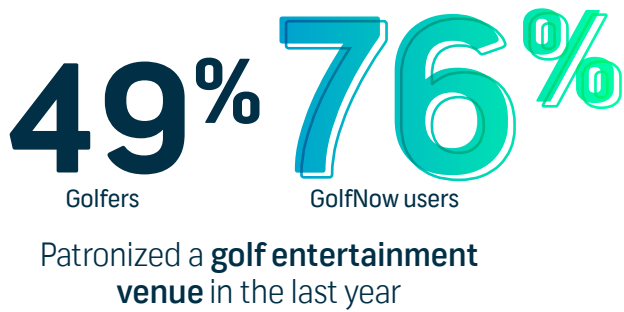
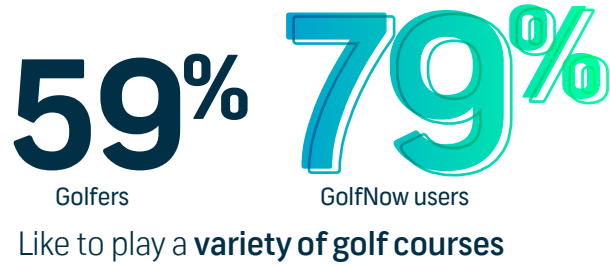
Percentage wagering on golf with friends



GOLFERS' BEHAVIORS ON AND OFF THE COURSE

WHERE THEY PLAYED AND IN WHAT CONDITIONS

Over half of the golfers surveyed said they like to play a variety of golf courses. This number increases to **over three-quarters among GolfNow users**. GolfNow users are also more likely to belong to a golf club and enjoy a golf entertainment venue.



GOLFERS' BEHAVIORS ON AND OFF THE COURSE

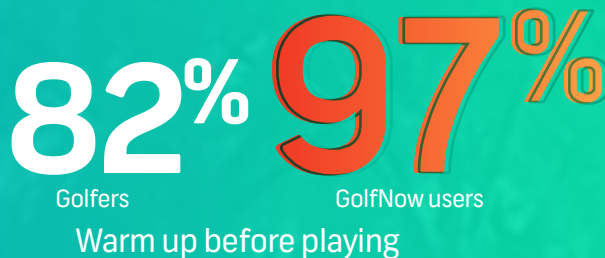
This past year, the golf industry faced a number of weather-related challenges from extreme heat to punishing rains, which kept many golfers at home and off the course. When the golfers surveyed were asked about the likelihood of playing in extreme conditions, **nearly half said they would play golf in temps over 90 degrees Fahrenheit or below 50 degrees Fahrenheit**, with over a third saying they would play in the rain. GolfNow golfers were a little more daring with over half saying they would play under those trying temperatures and in the rain.



GOLFERS' BEHAVIORS ON AND OFF THE COURSE

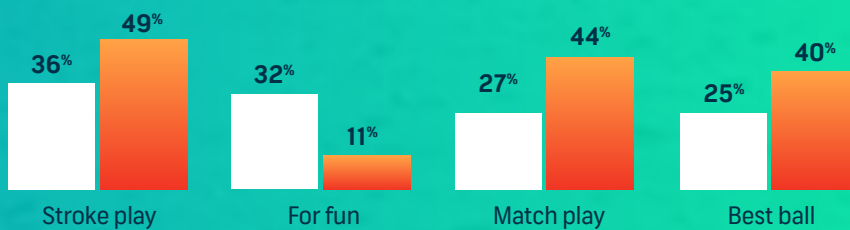
COMMON BEHAVIORS AT THE GOLF COURSE

Most golfers surveyed warm up at both the driving range and putting green before a round, especially the GolfNow golfers. Some also used golf simulators at the course, if available.



While golfers said they play a variety of formats, stroke play is still the most popular. GolfNow golfers tend to be **more serious golfers and are more likely to keep score, rather than playing just for fun.**

TOP FORMATS THAT GOLFERS PLAY

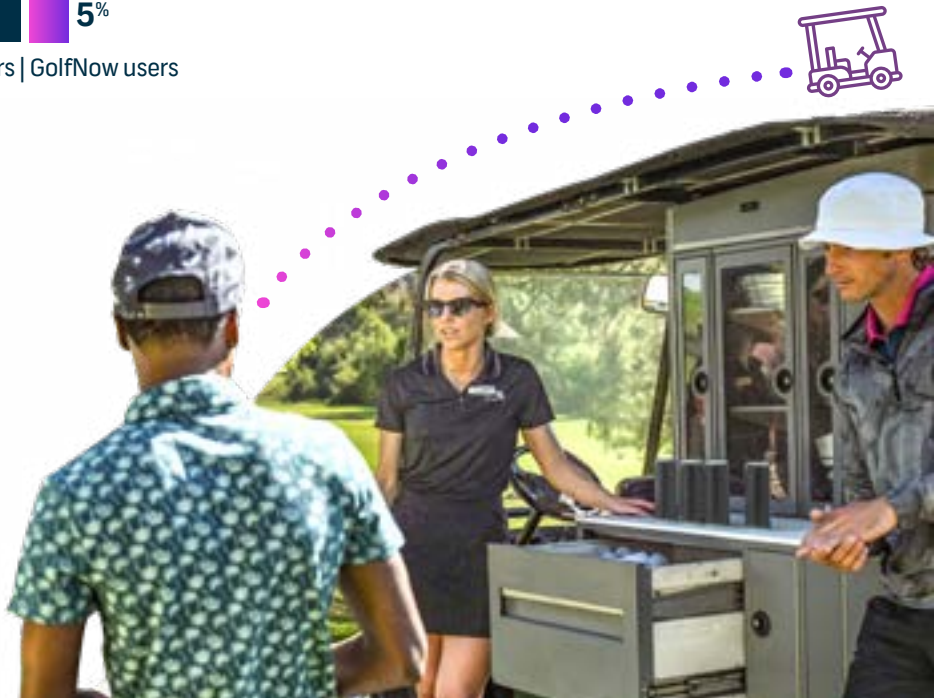
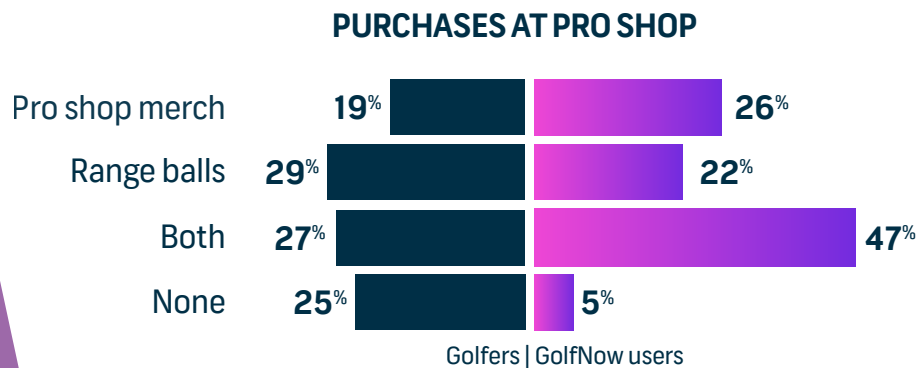
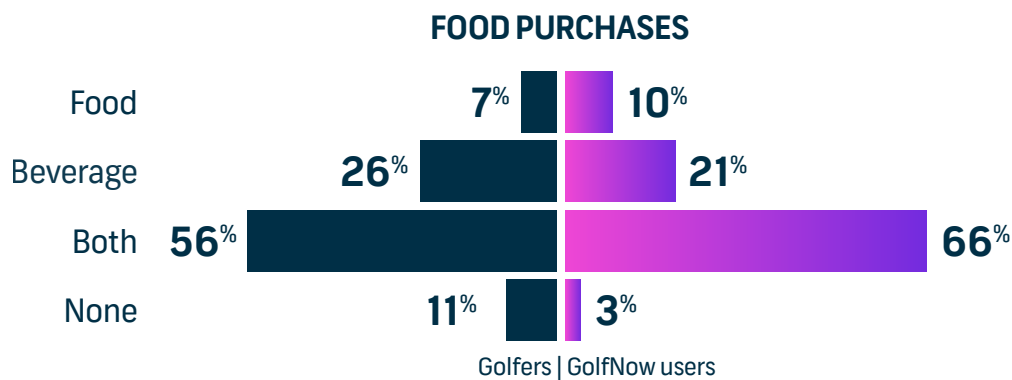


Golfers
 GolfNow users

GOLFERS' BEHAVIORS ON AND OFF THE COURSE

MOST GOLFERS SPEND MONEY AT THE COURSE, OUTSIDE OF THE ROUND

Three-quarters of golfers surveyed said they spend money at the course, in addition to the cost of their rounds. While about one-third said they make purchases of both range balls and pro shop merchandise, nearly half of the GolfNow golfers said they do both. **Over half (56%) of all golfers said they purchased both food and beverages at the course, and that increased to 66% for GolfNow golfers.**



GOLFERS' BEHAVIORS ON AND OFF THE COURSE

GOLFERS ARE EAGER TO IMPROVE

A third of all golfers surveyed said they took a golf lesson in the past year. This number **increases to over two-thirds among GolfNow users**. The average golfer mainly takes lessons at the golf course whereas GolfNow users take lessons at both golf courses and non-golf course training facilities.



Over three-quarters of all golfers surveyed said they **watch instructional videos to help improve their golf game** and that number increases to a whopping 96% among GolfNow users. **The primary instructional video destination for all golfers surveyed is YouTube**, however both the general golfing public and GolfNow users said they watched instructional videos on social media, GOLF Channel, golf magazine websites, and online destinations, like GolfPass.

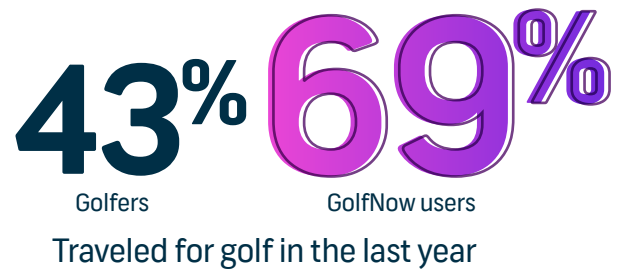
WHERE THEY TAKE LESSONS



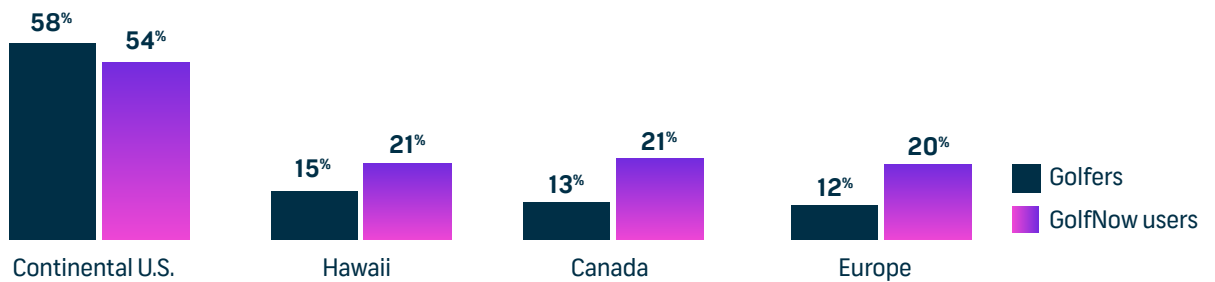
GOLFERS' BEHAVIORS ON AND OFF THE COURSE

GOLFERS LOVE TO PLAY AT HOME AND ON VACATION

While golfers love their hometown courses, they also love to play on vacation and take golf-related trips. **Nearly half of all golfers surveyed traveled to play golf in the last year, and that increases to over two-thirds among GolfNow users.** Golfers said they primarily travel within the continental U.S. to play golf, however GolfNow users also are more likely to extend their travel to various other locations, such as Hawaii, Canada, and Europe.



TOP TRAVEL LOCATIONS FOR GOLF



GolfNow users are nearly

20%

more likely than average golfers to tee it up during vacations



GOLFERS' BEHAVIORS ON AND OFF THE COURSE

GOLFERS LOVE ALL THINGS GOLF

Not only do golfers love to play golf, but they like to watch it on TV. Nearly three-quarters of all golfers surveyed said they watch the PGA Tour on TV, while over half watch the PGA Tour Champions and a third watch the LPGA Tour. While only about 20% of all golfers surveyed said they watch LIV Golf, that number increases to over a third for GolfNow users. Nearly all GolfNow golfers seek out golf news, compared to three-quarters of the average golfer, and they are much more likely to seek out content on GOLF Channel, as well as golf magazines and sports sites of all kinds.



Watch golf on TV



Search for golf news and info



GOLFERS AND TECHNOLOGY

GOLFERS TURN TO ONLINE TEE TIME BOOKING FOR CONVENIENCE

GolfNow has seen significant growth in the number of unique online bookers since 2019, prior to the pandemic to the present. In fact, we've seen a **52% increase in unique bookers who made a tee time on either the GolfNow website or app, or a golf course website or app for which GolfNow provides the booking technology.**

52%

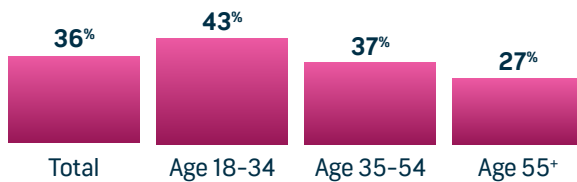
Increase in unique GolfNow bookers from pre-pandemic 2019 to 2023*

*across GolfNow's entire ecosystem

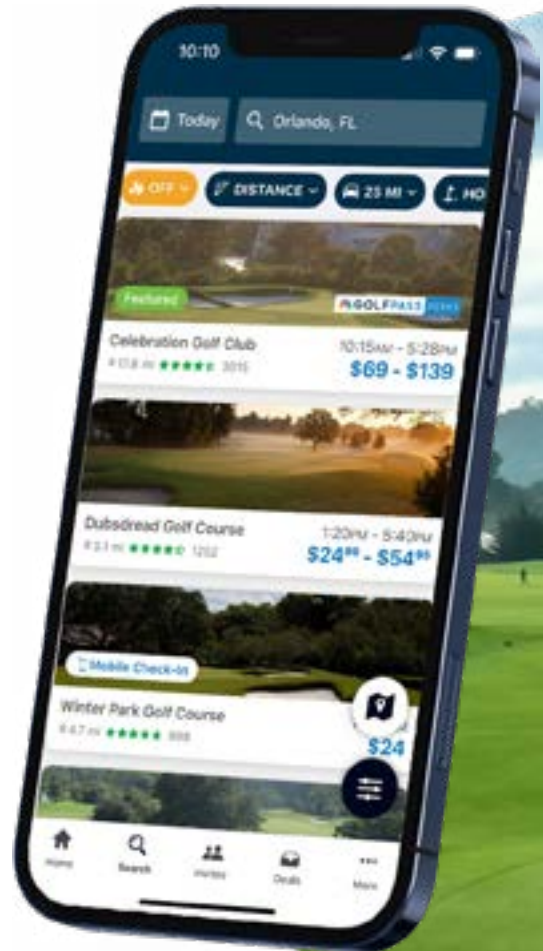


When asked about their online booking behavior, **over a third of all the golfers surveyed said they booked at least one round of golf online or through an app in the past year.** Younger golfers, ages 18 to 34, led the way with 43% saying they booked a round online, followed by 37% of golfers ages 35 to 54, and 27% of golfers ages 55 and older.

WHO BOOKED A ROUND OF GOLF ONLINE IN THE PAST YEAR



Golfers who booked a round of golf online or through an app find it the quickest way to book tee times and like the ability to book tee times 24/7 from anywhere.



GOLFERS AND TECHNOLOGY

REASONS FOR BOOKING ONLINE

Quickest way to book



Can book tee time 24/7 from anywhere



Easy to search and book course that fits my taste and budget



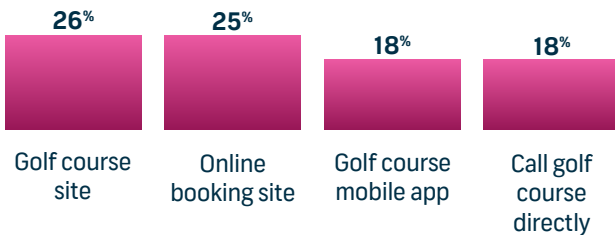
Like to see all the the golf courses options available to me



■ Golfers
■ GolfNow users

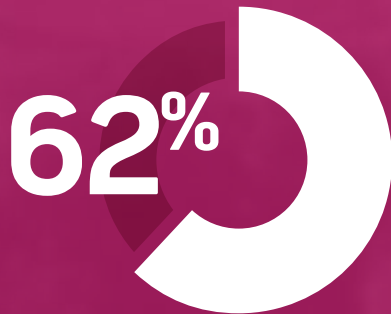
Golfers surveyed who said they **booked at least one round of golf online in the past year were evenly split in their preference to either book via a golf course website or on an online booking site.** Their preference is the same when it comes to booking on an app versus calling the golf course directly.

PREFERRED BOOKING METHOD

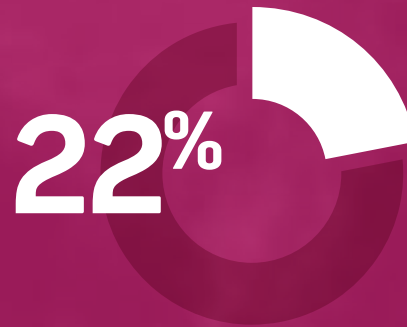


GOLFERS AND TECHNOLOGY

For the golfers surveyed who didn't book a round of golf online or through an app over the past year, when asked why, their top reasons included:



Would rather deal with a person to book their tee times



Want to avoid convenience fees

40%

Increase in GolfNow rounds booked from pre-pandemic 2019 to 2023*

*across GolfNow's entire ecosystem

GOLFNOW TOTAL ONLINE ROUNDS BOOKED UP 40% SINCE PRE-PANDEMIC

Since pre-pandemic (2019) to the present, GolfNow has seen a 40% increase in rounds booked across its ecosystem. After a huge spike in rounds booked in 2020 (46% increase from 2019), GolfNow has seen demand normalize over the past couple years to new, post-pandemic booking levels.

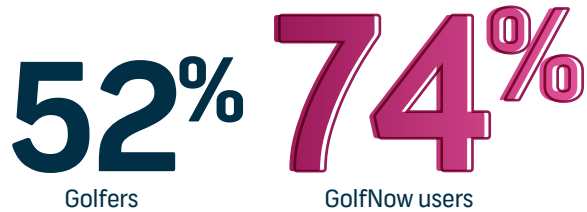
After a few fluctuations in 2021 and 2022, primarily due to extreme weather events, GolfNow's online booking volume has not only retained the growth it experienced during the pandemic, but it is seeing further increases with rounds booked up 3% in 2023, year-over-year.



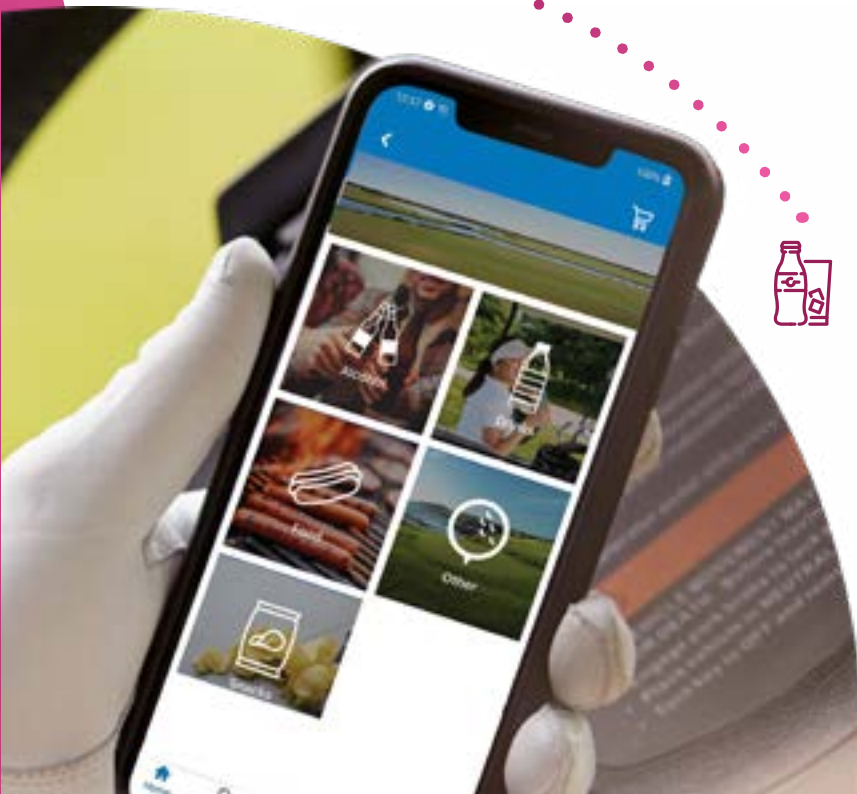
GOLFERS AND TECHNOLOGY

OTHER ONLINE BOOKER BEHAVIORS

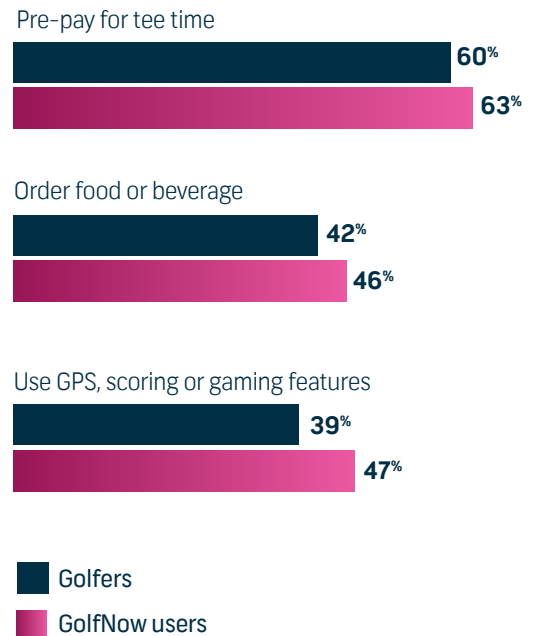
Prior to making their tee time decisions, half of the online bookers checked out golf course reviews online. This number increases to three-quarters among GolfNow users. Outside of pre-paying for tee times online, golfers have also ordered food or beverages and used GPS, scoring, or gaming features online.



Check golf course reviews before booking a tee time



MOBILE GOLF ACTIVITIES

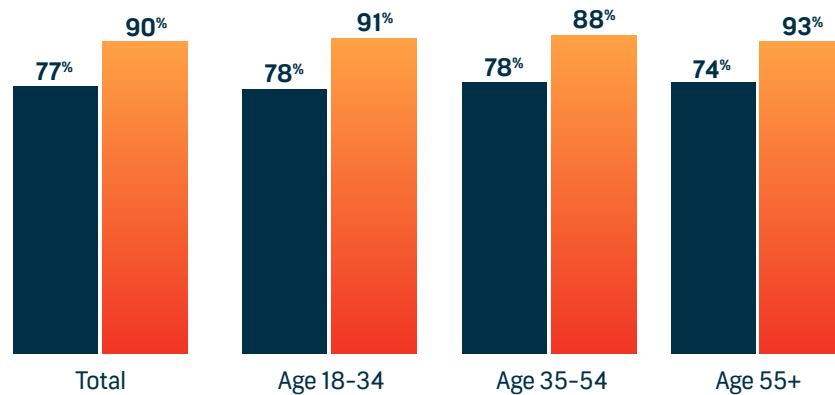


MOTIVATING GOLFERS TO PLAY MORE

MAJORITY OF GOLFERS WANT TO PLAY MORE GOLF

Looking at the upcoming year, **over three-quarters of golfers surveyed said they plan to play at least 5 rounds** and this number increases to **90% among GolfNow users**. Another encouraging note for the future of the sport, these percentages are **slightly higher among golfers ages 18-34**.

GOLFERS WHO PLAN TO PLAY 5+ ROUNDS OF GOLF THIS UPCOMING YEAR

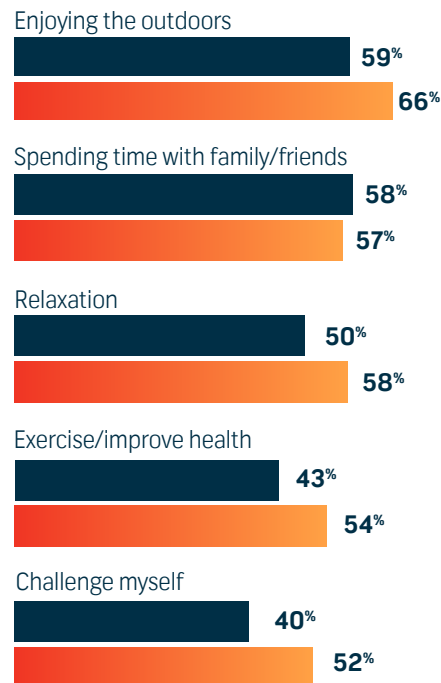


■ Golfers
■ GolfNow users

Golfers love being outdoors, enjoying time with friends and family, and relaxing

When asked what golfers love most about the sport, survey participants expressed multiple motivations, including the **joy of being outdoors and spending quality time with family and friends**, as well as the pure relaxation of being on a golf course. Golfers also like that the sport is a pleasurable form of **exercise with great health benefits**, while others love it for the spirit of competition and pure joy of whacking around that little white ball.

MOTIVATIONS FOR PLAYING GOLF



MOTIVATING GOLFERS TO PLAY MORE

WHAT DO YOU LIKE ABOUT GOLF?



Outdoor experience: Golf is typically played in beautiful outdoor settings, allowing players to enjoy nature, fresh air, and green landscapes.

-Male, 35-44



Being outdoors and socializing with friends, building business relationships.

-Female, 35-44



It relaxes me when I play, all my concentration and attention is with the ball and club

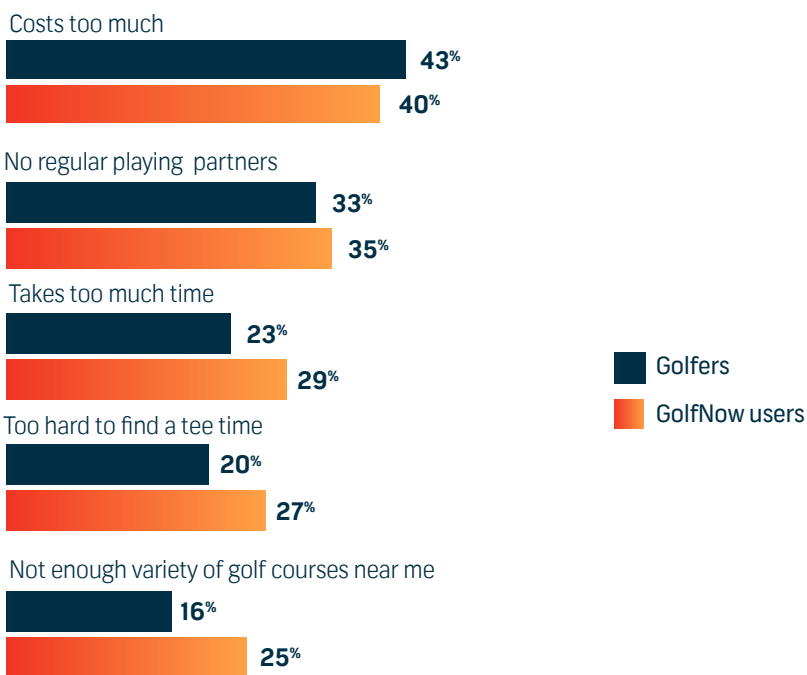
-Male, 25-34

MOTIVATING GOLFERS TO PLAY MORE

WHAT'S PREVENTING GOLFERS FROM PLAYING MORE

In general, golfers across the country agree that they would be motivated to play more golf if it was more affordable, they had more friends who play golf, and had more time to play. Others would be motivated to play more golf if they had more places to play, and it was easier to find a tee time.

DETERRENTS FROM PLAYING GOLF



MOTIVATING GOLFERS TO PLAY MORE

WHAT GOLF COURSES CAN DO TO ATTRACT MORE GOLFERS

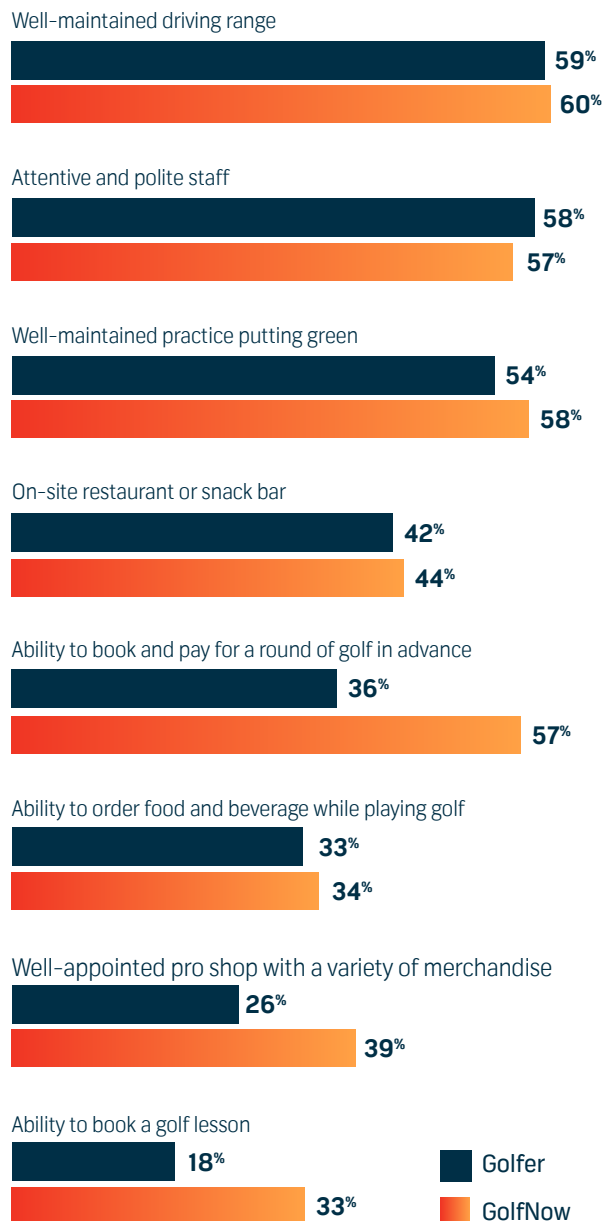
As far as the overall experience at the golf course, the golfers who were surveyed provided helpful feedback on what services are important to them. **More than half of golfers said that a well-maintained driving range and putting green are important**, as well as an attentive and polite staff. An on-site restaurant or snack bar is also key.

GolfNow users cited the ability to pay for a golf round in advance, a well-appointed pro shop with a wide variety of merchandise and the ability to book a golf lesson were all important features. Offering golf carts was also important, as more than half said they prefer golf carts over walking during their golf rounds.

59% Golfers
67% GolfNow users
 Use a golf cart more than walking



IMPORTANT GOLF COURSE SERVICES



SUMMARY

We're confident you'll take away from this study that the **popularity of golf is very much alive and well!**

And even better is that the gains in participation that golf has made over the past several years not only have been maintained, but also have been achieved in a variety of ways and with a more diverse consumer base than ever before. **Our respondents love playing golf and want to play more in the coming year**, using the sport to spend quality time outdoors with their friends and family.

They're embracing technology as well to enhance their playing experience, whether it's using their smartphone to book and pay for a tee time in advance or even ordering food and beverages at the course. We also saw how all these great stats were bolstered even more by those respondents who also are GolfNow users.

It all adds up to what seems like a new era for golf, with new characteristics that those who manage golf courses around the world are recognizing and shifting their strategies accordingly to connect more people to the sport.

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