



# GOLF

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# TRAVEL

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## IN THE U.S.

**NGF**  
*Helping Golf Businesses Succeed*

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**KEY FINDINGS**

- After experiencing a slump following 9/11, golf travel recovered somewhat as of 2007 in terms of both the percentage and number of golfers who play golf while traveling. Further research will be required to assess the impact of the current recession on golf travel.
- In 2007, 44% of adult golfers played golf while traveling on business or vacation. That equates to 11.4 million golfers.
- One in 10 golfers played golf while on a business trip in 2007 while four in 10 played golf on vacation.
- Golfers played 67.8 million rounds of golf while traveling for business or pleasure in 2007, which represents approximately 14% of total rounds played that year.
- The incidence of golf travel increases with age and income.
- Two-thirds of travel rounds are played by golfers ages 50 and above.
- The more avid the golfer in terms of play frequency, the more likely they are to be a golf traveler, and the more rounds they play while traveling.
- One-third of frequent golf travelers (those playing five or more rounds a year while traveling) are private club members.

**DEFINITIONS**

GOLF TRAVELER:	A golfer age 18 and above who traveled on business or vacation and played golf at least once while on a trip.
BUSINESS GOLF TRAVELER:	A golfer age 18 and above who traveled on business (primary purpose of trip was business-related) and played golf at least once while on a business trip.
VACATION GOLF TRAVELER:	A golfer age 18 and above who traveled on vacation (primary purpose of trip was for personal leisure) and played golf at least once while on a vacation trip.
TRIP:	A business or vacation trip (primary purpose was business-related or for personal leisure) that originated from an individual's permanent home and involved at least one overnight stay.

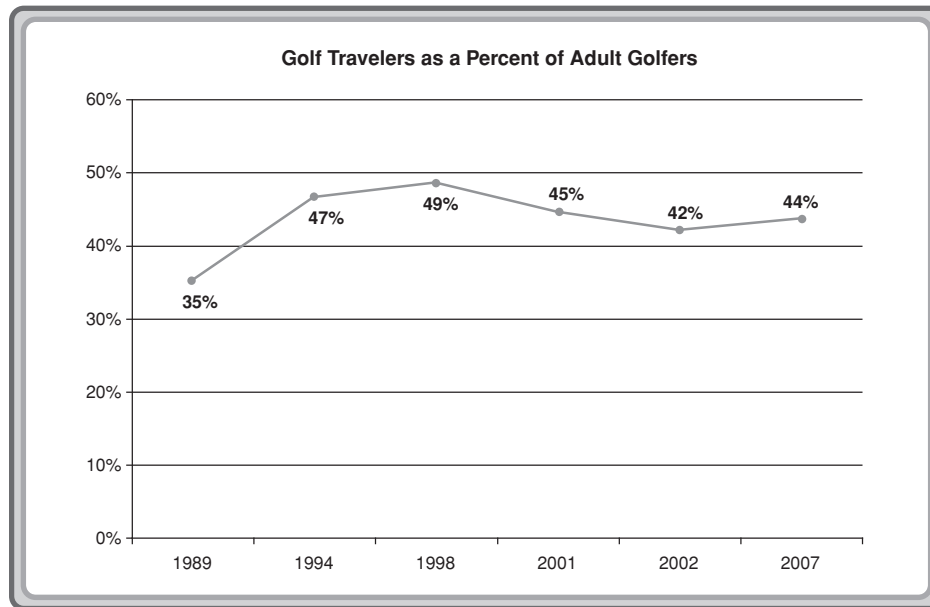
**METHODOLOGY**

Information in this report is based on an NGF survey of 1,993 golfers fielded by Synovate, a global market research company. Respondents were randomly chosen from Synovate's online panel of over two million Americans. Data was statistically weighted on key U.S. Census variables such as age and income to be nationally representative of all U.S. golfers.

## TRENDS IN GOLF TRAVEL PARTICIPATION

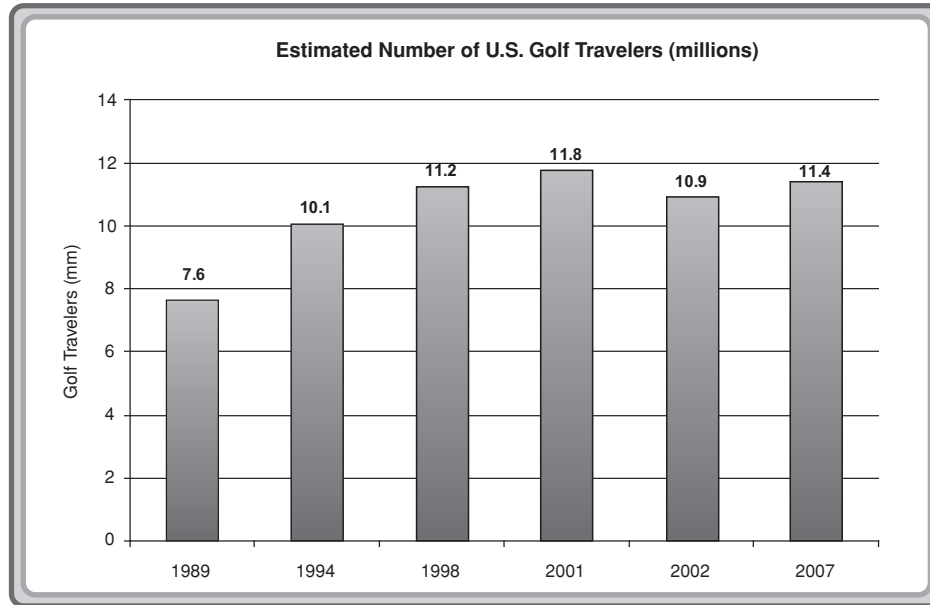
### TRENDS IN GOLF TRAVEL PARTICIPATION, 1989 - 2007

The percentage of American golfers who engage in golf-related travel peaked in 1998, fell during the recession of 2001 and the travel slump following 9/11, but has since recovered somewhat. In 2007, 44% of golfers played golf while traveling for business or pleasure.



## TRENDS IN GOLF TRAVEL PARTICIPATION, 1989 - 2007

The number of golf travelers peaked in 2001, dropped after 9/11 and rebounded somewhat in the ensuing five years.



## HISTORICAL SUMMARY

	1989	1994	1998	2001	2002	2007
Golf Travelers as a Percent of Adult Golfers	35.0%	46.6%	48.6%	44.6%	42.0%	43.6%
Estimated Number of Golf Travelers (mm)	7.6	10.1	11.2	11.8	10.9	11.4
% Male	82.6%	79.4%	77.1%	77.4%	77.3%	80.7%
% Female	17.4%	20.6%	22.9%	22.6%	22.7%	19.3%
Number of Non-traveling Golfers (mm)	14.2	11.5	11.9	14.6	15.1	14.7
Total Golfer Population (ages 18 and over) (mm)	21.8	21.6	23.1	26.4	26.0	26.1

## ALL GOLF TRAVELERS

### PROFILE OF ALL GOLF TRAVELERS - 2007

Incidence of golf travel increases with age and income.

	Percent of U.S. Golfers	Percent of U.S. Golf Travelers	Number of Golf Travelers	Incidence	Incidence Index <sup>(1)</sup>
Total	100.0%	100.0%	11,393	43.6%	100
Male	77.1%	80.7%	9,196	46.2%	106
Female	22.9%	19.3%	2,197	35.5%	81
<b>Age</b>					
18-29	19.9%	13.0%	1,479	28.4%	65
30-39	19.8%	19.3%	2,202	42.6%	98
40-49	21.1%	19.4%	2,212	40.2%	92
50-59	19.1%	21.7%	2,471	49.6%	114
60+	20.1%	26.6%	3,029	57.8%	132
<b>Household Income (000)</b>					
<\$25	6.3%	5.0%	566	35.3%	81
\$25-\$49	18.1%	10.4%	1,180	26.2%	60
\$50-\$74	19.9%	16.6%	1,886	37.5%	86
\$75-\$99	18.1%	17.1%	1,953	46.5%	107
\$100-\$149	24.1%	32.8%	3,734	50.1%	115
\$150+	13.4%	18.2%	2,074	62.7%	144

### AVERAGES

	All U.S. Golfers	U.S. Golf Travelers
Average Household Income	\$82,540	\$104,000
Average Age	44.7	48.5
Average # of Rounds/Year	17.7	25.7

<sup>(1)</sup> The index compares the given segment with the total (100 = average). For example, the male index of 106 is 6% higher than the total (46.2% is 6% higher than 43.6%).

## PROFILE OF ALL GOLF TRAVELERS

The 67.8 million rounds played while traveling in 2007 represent 13.6% of the total 498.1 million rounds played that year.

Not only are higher income golfers more likely to be golf travelers, they also average more trips, more days away and more rounds on the road.

The average number of golf trips decreases in the older age groups (50+) but the average number of rounds increases. In other words, age 50+ golfers play more rounds per trip as compared to younger ones.

	Golf Travelers (000)	Business and Vacation Golf Trips (Avg)	Total Business & Vacation Golf Trips (000)	Annual Travel Rounds Played (Avg)	Total Annual Rounds Played (000)	Days Away on All Business and Vacation Golf Travel (Avg)
Total	11,393	6.9	78,395	6.0	67,809	30.9
Male	9,196	7.4	67,743	6.1	56,536	32.9
Female	2,197	4.9	10,656	5.1	11,273	22.3
<b>Age</b>						
18-29	1,479	4.4	6,566	4.1	6,048	18.6
30-39	2,202	4.8	10,653	2.8	6,232	16.3
40-49	2,212	10.4	22,910	4.9	10,735	46.3
50-59	2,471	9.8	24,118	7.0	17,210	38.8
60+	3,029	4.7	14,182	9.1	27,583	29.9
<b>HH income (000)</b>						
<\$25	566	4.8	2,720	5.0	2,850	19.7
\$25-\$49	1,180	4.8	5,700	4.0	4,736	21.3
\$50-\$74	1,886	4.7	8,938	4.8	9,050	21.7
\$75-\$99	1,953	5.6	11,008	4.9	9,539	25.5
\$100-\$149	3,734	7.0	26,162	5.1	19,116	30.1
\$150+	2,074	11.5	23,855	10.9	22,519	54.4

**ALL GOLF TRAVELERS BY PLAY FREQUENCY SEGMENT**

The more avid the golfer in terms of play frequency, the more likely they are to be a golf traveler, and the more rounds they play while traveling.

	Percent of all Adult U.S. Golfers	Number of Adult U.S. Golfers (000)	Percent of all Golf Travelers	Total Number of Golf Travelers (000)	Index to Total Golfers
Occasional (1-7 rounds/yr)	39.7%	10,377	26.4%	3,013	67
Moderate (8-24 rounds/yr)	29.6%	7,734	27.7%	3,159	94
Avid (25+ rounds/yr)	30.6%	7,999	45.8%	5,220	150

	Business and Vacation Trips (Avg)	Days Away on All Business and Vacation Golf Travel (Avg)	Travel Rounds Played (Avg)
Occasional (1-7 rounds/yr)	5.7	26.9	2.7
Moderate (8-24 rounds/yr)	9.4	36.3	4.4
Avid (25+ rounds/yr)	6.4	29.9	8.8
All Golf Travelers	6.9	30.9	6.0



## BUSINESS GOLF TRAVELERS

### PROFILE OF BUSINESS TRAVELERS WHO PLAY GOLF WHILE ON BUSINESS

Business golf travel is less common than vacation golf travel. One in 10 golfers engages in business golf travel while four in 10 play golf on vacation. (Forty-four percent play golf either on business or vacation, counting the overlap.)

Business golfers skew more male, ages 50-59 and higher income.

	Percent of U.S. Golfers	Percent of Business Golf Travelers	Number of Business Golf Travelers	Incidence	Incidence Index
Total	100.0%	100.0%	2,726	10.4%	100
Male	77.1%	95.4%	2,600	13.0%	125
Female	22.9%	4.6%	126	2.0%	20
<b>Age</b>					
18-29	19.9%	5.4%	147	2.8%	27
30-39	19.8%	17.7%	482	9.3%	89
40-49	21.1%	25.6%	697	12.7%	121
50-59	19.1%	38.3%	1,044	20.9%	201
60+	20.1%	13.1%	356	6.8%	65
<b>Household Income (000)</b>					
<\$25	6.3%	1.7%	48	3.0%	28
\$25-\$49	18.1%	5.9%	160	3.5%	34
\$50-\$74	19.9%	8.8%	240	4.8%	46
\$75-\$99	18.1%	13.4%	366	8.7%	83
\$100-\$149	24.1%	31.8%	866	11.6%	111
\$150+	13.4%	38.4%	1,047	31.7%	303

### AVERAGES FOR BUSINESS GOLF TRAVELERS

	All U.S. Golfers	All Golf Travelers	Business Golf Travelers
Average Household Income	\$82,540	\$104,000	\$130,430
Average Age	44.7	48.5	49.0
Average # of Rounds/Year	17.7	25.7	22.0

**BUSINESS TRAVEL AND ROUNDS PLAYED WHILE ON BUSINESS**

	Number of Business Golf Trips (Avg)	Days Away on Business Golf Trips (Avg)	Business Travel Rounds Played (Avg)
All Business Golf Travelers	9.5	38.2	4.4
Male	9.7	39.5	4.6
Female	5.4	11.6	2.0

**BUSINESS GOLF TRAVELERS BY PLAY FREQUENCY SEGMENT**

	Percent of all Adult U.S. Golfers	Number of Adult U.S. Golfers	Percent of all Business Golf Travelers	Total Number of Business Golfers (000)	Index to Total Golfers
Occasional (1-7 rounds/yr)	39.7%	10,377	22.1%	1,381	56
Moderate (8-24 rounds/yr)	29.6%	7,734	23.8%	1,487	80
Avid (25+ rounds/yr)	30.6%	7,999	54.1%	3,378	177

	Number of Business Golf Trips (Avg)	Days Away on Business Golf Trips (Avg)	Business Travel Rounds Played (Avg)
Occasional (1-7 rounds/yr)	6.7	48.1	1.3
Moderate (8-24 rounds/yr)	11.9	45.8	2.9
Avid (25+ rounds/yr)	9.5	30.8	6.4
All Business Golf Travelers	9.5	38.2	4.4

## VACATION GOLF TRAVELERS

### PROFILE OF VACATION TRAVELERS WHO PLAY GOLF WHILE ON VACATION

Vacation golfers skew older and higher income.

	Percent of U.S. Golfers	Percent of Vacation Golf Travelers	Number of Vacation Golf Travelers (000)	Incidence	Incidence Index
Total	100.0%	100.0%	10,469	40.1%	100
Male	77.1%	80.7%	8,450	41.7%	104
Female	22.9%	19.3%	2,019	35.1%	87
<b>Age</b>					
18-29	19.9%	13.0%	1,359	28.1%	70
30-39	19.8%	19.3%	2,023	39.3%	98
40-49	21.1%	19.4%	2,033	35.5%	89
50-59	19.1%	21.7%	2,271	40.1%	100
60+	20.1%	26.6%	2,783	57.6%	144
<b>Household Income (000)</b>					
<\$25	6.3%	5.0%	520	34.7%	87
\$25-\$49	18.1%	10.4%	1,084	24.0%	60
\$50-\$74	19.9%	16.6%	1,733	34.9%	87
\$75-\$99	18.1%	17.1%	1,795	43.8%	109
\$100-\$149	24.1%	32.8%	3,431	48.2%	120
\$150+	13.4%	18.2%	1,906	49.5%	124

### AVERAGES FOR VACATION GOLF TRAVELERS

	All U.S. Golfers	All Golf Travelers	Vacation Golf Travelers
Average Household Income	\$82,540	\$104,000	\$102,150
Average Age	44.7	48.5	48.6
Average # of Rounds/Year	17.7	25.7	26.7

## VACATION TRAVEL AND ROUNDS PLAYED WHILE ON VACATION

	Number of Vacation Golf Trips (Avg)	Days Away on Vacation Golf Trips (Avg)	Vacation Travel Rounds Played (Avg)
All Vacation Golf Travelers	3.3	17.8	5.3
Male	3.3	17.7	5.4
Female	3.2	18.3	5.1

## VACATION GOLF TRAVELERS BY PLAY FREQUENCY SEGMENT

	Percent of all Adult U.S. Golfers	Number of Adult U.S. Golfers	Percent of all Vacation Golf Travelers	Total Number of Vacation Golfers (000)	Index to Total Golfers
Occasional (1-7 rounds/yr)	39.7%	10,377	25.2%	2,641	63
Moderate (8-24 rounds/yr)	29.6%	7,734	27.4%	2,870	93
Avid (25+ rounds/yr)	30.6%	7,999	47.4%	4,958	155

	Number of Vacation Golf Trips (Avg)	Days Away on Vacation Golf Trips (Avg)	Vacation Travel Rounds Played (Avg)
Occasional (1-7 rounds/yr)	3.0	14.7	2.7
Moderate (8-24 rounds/yr)	4.1	16.6	4.2
Avid (25+ rounds/yr)	3.0	20.1	7.3
All Vacation Golf Travelers	3.3	17.8	5.3

## MEDIA HABITS OF FREQUENT GOLF TRAVELERS

(played five or more rounds while traveling in 2007)

How often watch golf on TV	
Daily	12%
Weekly	61%
Monthly	7%
Less than monthly	19%
Never	1%
Total	100%

How often visit golf-related Web sites	
Daily	6%
Weekly	28%
Monthly	11%
Less than monthly	44%
Never	11%
Total	100%

Golf-related Magazines	
Subscribe to a golf-related magazine	58%
Read but don't subscribe	23%
Don't read	19%
Total	100%

Note: 41% of frequent golf travelers indicated they researched golf travel online in the past 12 months.