

Golf Life Insights

Powered by: Golf Life Navigators

Unlocking Member Demand: A Data-Driven Trend Report Through Mid-2025

2025 Mid-Year Report

Market Shifts & Consumer Demand Insights

As we move through 2025, demand for private club memberships and the golf lifestyle remains strong. However, the real estate market is shifting. In many Sunbelt markets, golf home prices have declined 10–15%, driven by a 90% year-over-year increase in inventory.

What impact will this have on attrition rates and member behavior at your club? This report offers key insights into current demand trends, buyer motivations, and shifting expectations around amenities and social offerings.

Thank you for your continued support of Golf Life Navigators—we hope you find this report both timely and valuable.

Jason Becker, CEO
Golf Life Navigators



A Little About Golf Life Insights

Who we are

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Golf Life Insights - a division of Golf Life Navigators - was launched in 2021 as a data and analytics asset for club officials and golf centric organizations. With over 8 million data points and 55,000 private golf buyers to survey, Golf Life Insights is the first of its kind and a resource that can be quickly leveraged ahead of strategic planning for subscribers. Golf Life Navigators (GLN), efficiently eases the process of determining the precise golf and country club membership choices for golfers looking to retire, relocate or engage in the “snowbird” life. Created in 2014 by grass-root PGA Professionals, club managers and membership directors, GLN’s algorithmic technology guides discerning golfers, club seekers and property buyers through an in-depth questionnaire and provides instant matches of club communities that are befitting of their unique lifestyle desires and budgets. GLN’s industry facing program, provides private club communities an opportunity to virtually connect with the above-mentioned buyers and gain timely consumer buying trend reports to watch the market closely. In 2018, Golf Magazine hailed GLN as “eHarmony meets Zillow for golf.”

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Preparing for the Next Generation of Golfers

Golf Life Insights: Over the past five years, Golf Life Navigators has benefited from a remarkably consistent demographic: Baby Boomers retiring at a rate of over 13,000 individuals per day. This steady wave of retirees has provided a reliable pipeline of prospective club members who value golf as a core component of their post-career lifestyle.

However, we are now entering a pivotal transition. With approximately five years remaining in this retirement surge, it is imperative for private clubs to begin looking ahead. Generation X is next in line—and their expectations, preferences, and decision-making behaviors will differ from those of their predecessors.

Now is the time for clubs to think strategically:

- What matters most to Gen X golfers?
- How do their lifestyle patterns and financial priorities differ?
- What does an attractive membership experience look like to them?

Clubs that begin adapting now—by understanding and marketing to this next generation—will be best positioned to sustain membership growth and remain relevant in the evolving golf landscape.

Age

3

Average Age



Slight Uptick in Transition Time – But a Prime Window Remains

Golf Life Insights: So far in 2025, we've seen a slight uptick in the anticipated transition timeline for consumers moving into private club life. However, this extended timeframe still presents an ideal opportunity for clubs to engage early and shape the narrative.

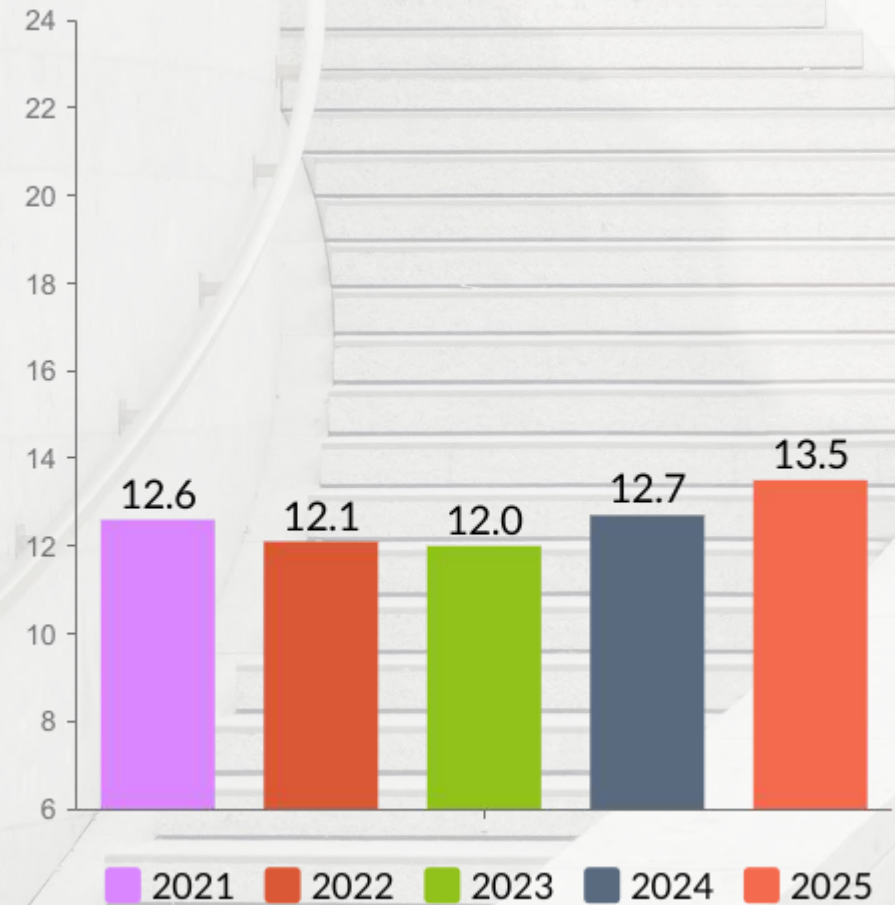
It's important to remember: nearly **80% of prospective members are searching for both a golf club and a home simultaneously**. With so much at stake in their decision-making process, the transition window typically spans **12 to 14 months**—a critical period during which effective messaging and strategic outreach can significantly influence the outcome.

For clubs, this means:

- Be proactive** in your outreach.
- Tailor messaging** to resonate with both lifestyle and real estate priorities.
- Establish trust early** to stay top-of-mind throughout the journey.

Engaging prospects at the front end of this timeline is no longer optional—it's a strategic imperative.

Average Transition Time -Months



Understanding the Golf Life Navigators Consumer Profile

Golf Life Insights: As illustrated in the accompanying graph, the typical Golf Life Navigators user is male. However, our insights suggest that while he may be the one completing the questionnaire, he is doing so with his **entire family's lifestyle in mind**—not solely his own preferences.

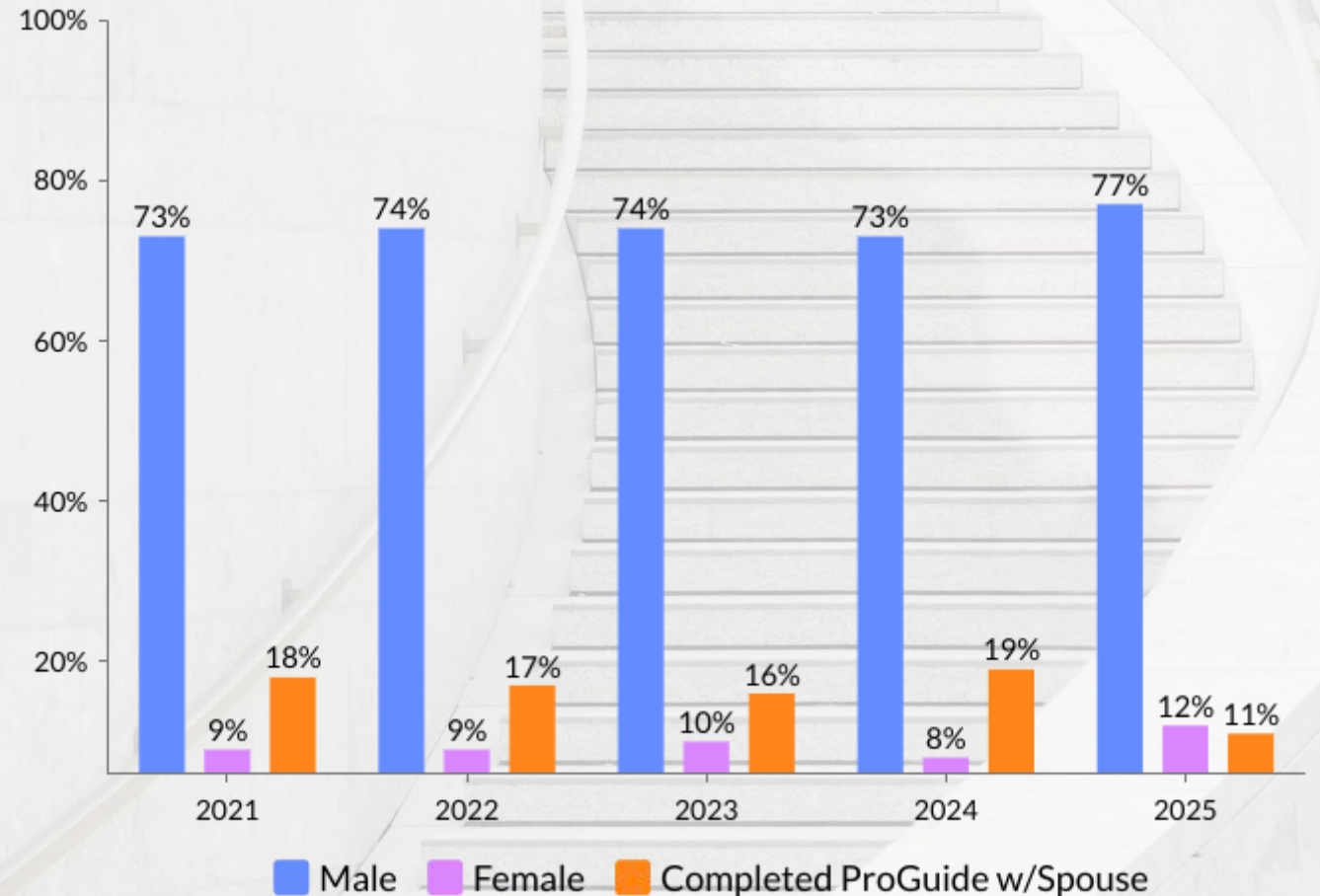
This assumption is reinforced by data presented throughout the remainder of this report. From amenity prioritization to location preferences and community values, the responses reflect a broader set of household considerations, particularly those influenced by a spouse or partner.

We believe that after reviewing the data, you will agree.

Today's club decision-maker is thinking well beyond the fairway.

*ProGuide: GLN's online questionnaire that instantly matches buyers to clubs and communities across the Sunbelt - based upon the buyers specific criteria and budget

Gender & Spouse Breakdown



Post-COVID Trends: Budgets Are Rising with Market Demand

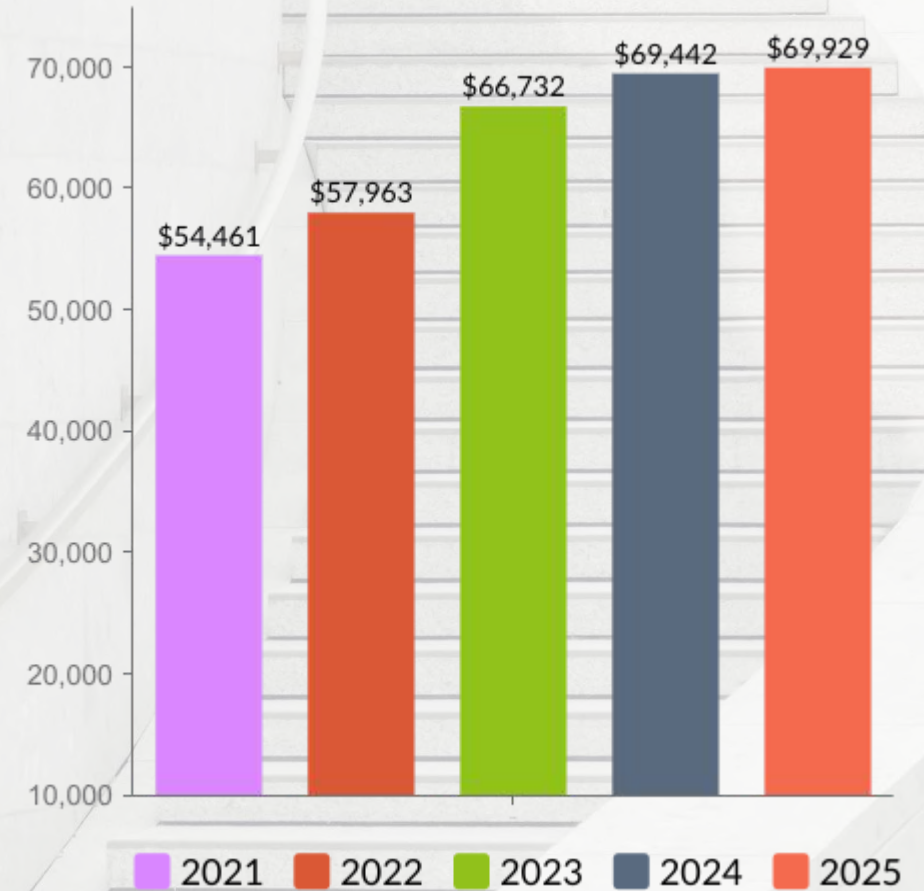
Golf Life Insights: Since the onset of COVID, we've observed a **steady increase in consumer budgets**—a trend that closely aligns with the heightened demand for private golf memberships nationwide.

The chart provided here represents the **average budget** of an active golfer in the marketplace. However, it's important to remember that this is just a midpoint. Consumers exist at both ends of the financial spectrum, with budgets ranging from **\$10,000 to well over \$100,000** annually.

Key takeaway:

Don't be discouraged if your club falls above or below the national average. What matters most is understanding **who your ideal member is** and how to effectively **position your value** within the broader market landscape.

Average Initiation Budget



Annual Dues Budget: A Curious Shift in Consumer Budgeting

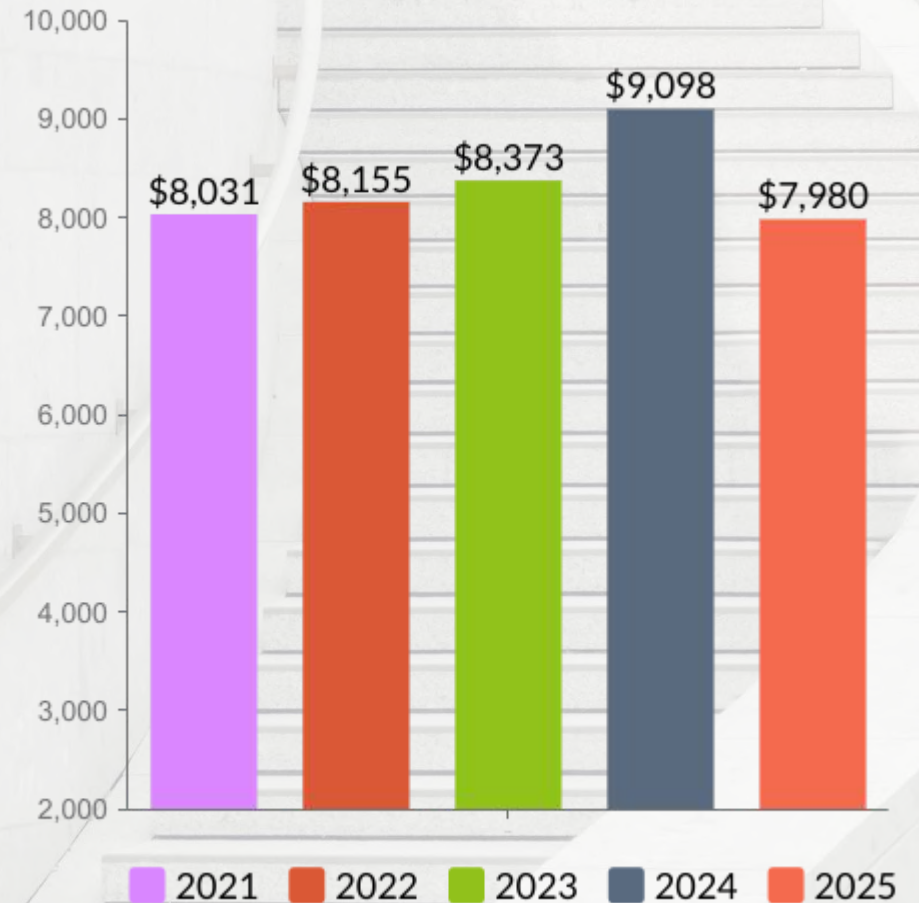
Golf Life Insights: As we reach the midpoint of 2025, we've encountered a bit of a head-scratcher. While average initiation fee budgets have remained steady, we're seeing a noticeable shift in how consumers are approaching their annual dues budgets.

What's behind the change? It's not entirely clear—yet. But we'll be monitoring this trend closely over the second half of the year and will report back with updated insights.

As with all national averages, it's important to note:

Consumers exist across a wide spectrum—with annual dues expectations ranging significantly. So, if your club falls outside of the current average, **don't worry**. The key is understanding your target audience and how to communicate your club's value effectively.

Annual Dues Budget



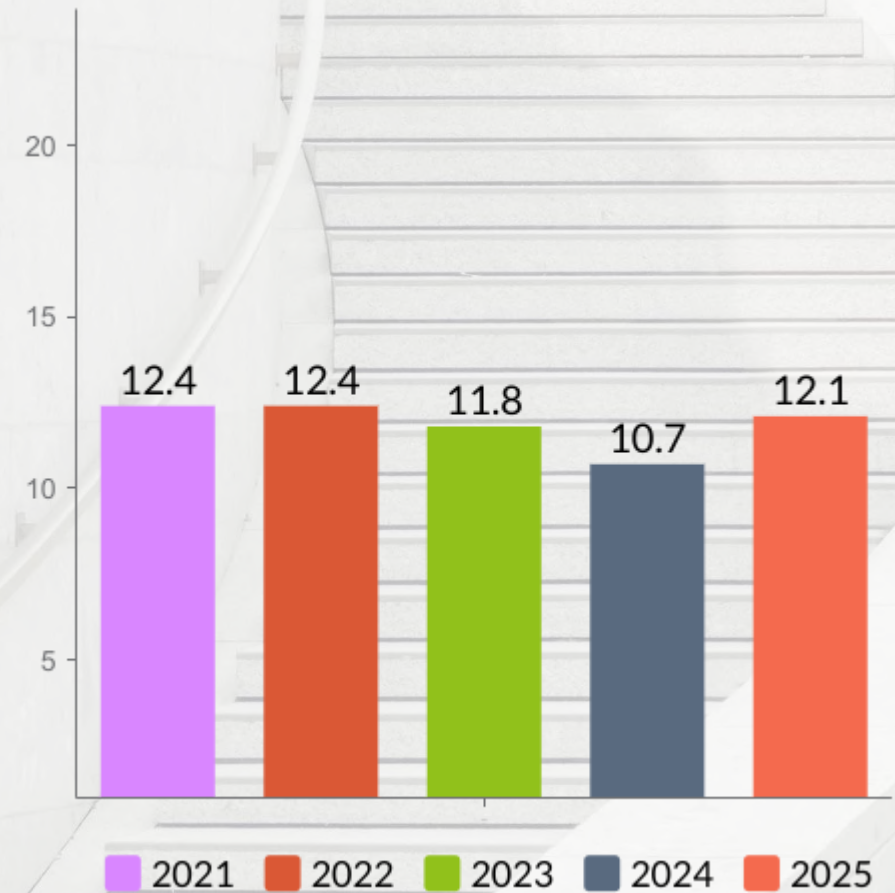
Five Years of Consistency: The Committed Golfer Profile

Golf Life Insights: Over the past five years, Golf Life Navigators has consistently attracted a specific type of golfer—one who is **highly committed** and ideally suited for a **full golf membership**.

These are the **die-hard players** who anticipate playing **3-4 days per week** and are often seen **grinding on the practice range**, chasing single-digit handicap status. Their passion for the game is evident not just in their frequency of play, but in their desire to fully immerse themselves in the club lifestyle.

For clubs seeking engaged, high-usage members, this profile represents a prime target for long-term retention and active participation.

Average Handicap



Speaking of Full Golf Memberships...

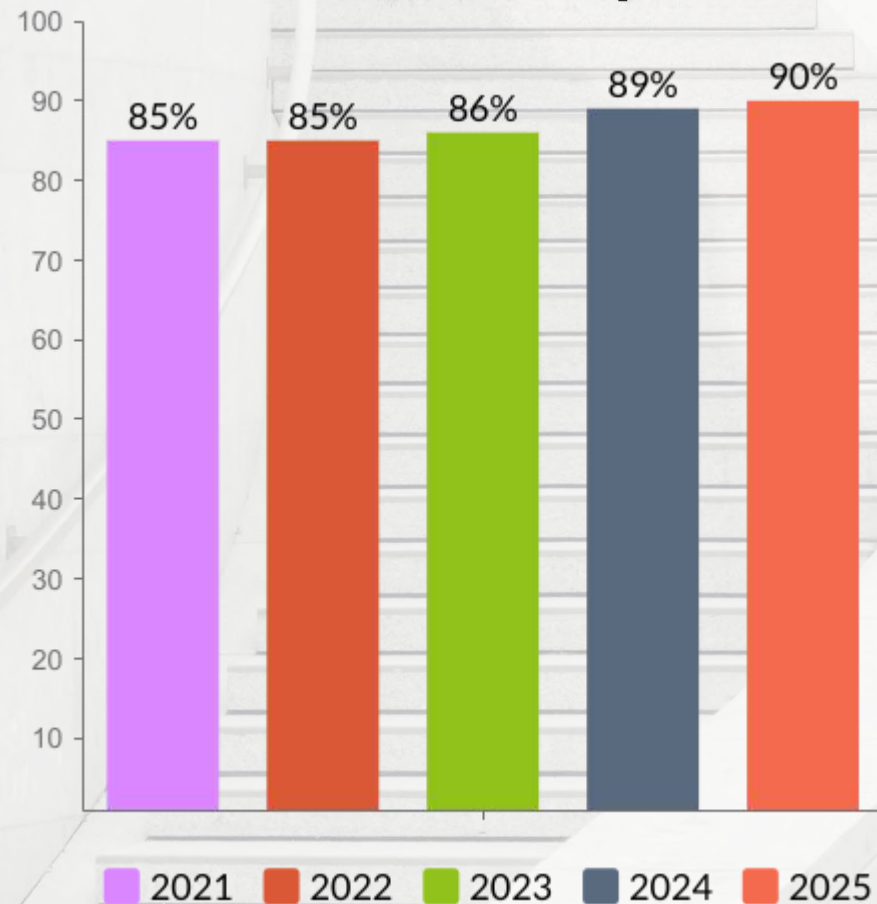
Golf Life Insights: As shown in the accompanying data, nearly 90% of Golf Life Navigators users are actively seeking a Full Golf Membership. This reinforces the platform's strength as a pipeline for highly qualified, committed golf consumers.

These individuals are not casual players—they're searching for a club where they can **play frequently, engage deeply, and become long-term contributors to the club community.**

For clubs looking to:

- Fill open full golf memberships, or
- Build and extend a waitlist of future dedicated members, GLN users represent a **highly valuable and targeted audience.**

Seeking a Full Golf Membership

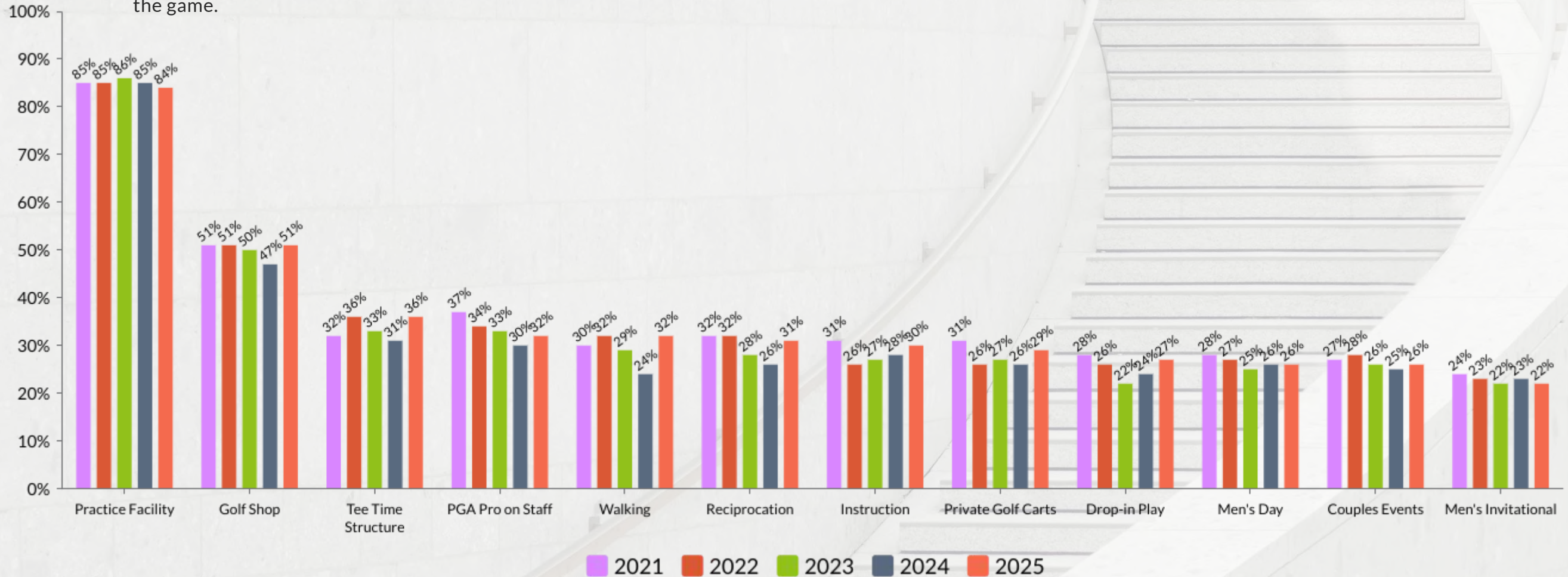


What Golf Amenities Matter Most in 2025?

Golf Life Insights: The data below highlights which **golf amenities and services are most important** to today's prospective members—and it's filled with valuable insights for clubs looking to align their offerings with current consumer preferences. A few notable shifts in 2025 include:

- A 5% increase in demand for a structured tee time system, signaling a growing preference for predictability and efficiency in play.
- An 8% increase in interest in walking the golf course, reflecting broader lifestyle trends around health, wellness, and a more traditional style of play.

These insights reinforce the importance of not just offering exceptional golf experiences—but tailoring them to how today's golfer wants to engage with the game.



Exploring Flexibility Beyond Full Golf Memberships

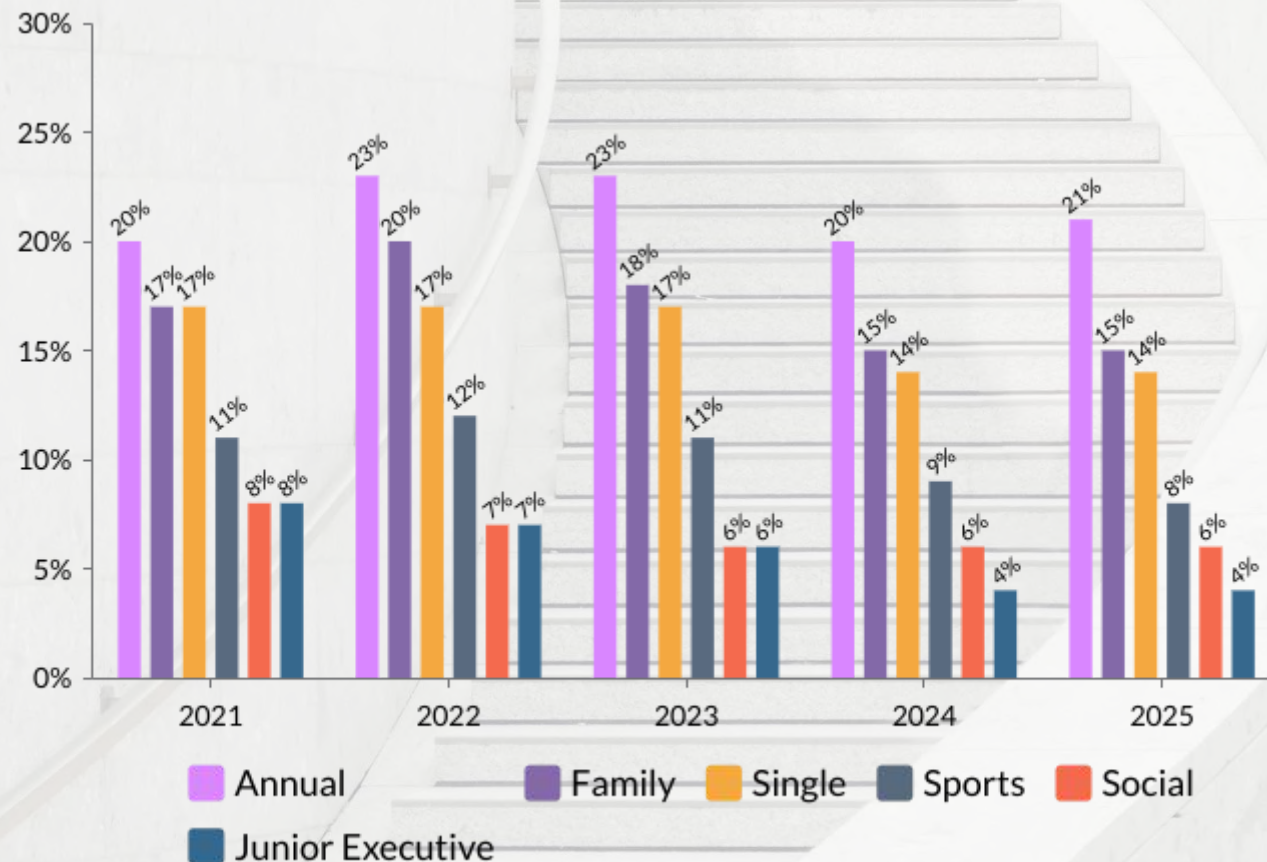
Golf Life Insights: While the majority of Golf Life Navigators users are seeking full golf memberships, many are also **open to alternative membership options**—especially in cases where a club is currently **waitlisted**.

Although this group doesn't represent the majority of the market, the interest is strong enough to warrant consideration. Offering **ancillary or transitional membership tiers**—such as limited golf, social with golf access, or weekday play—can be a smart strategy to:

- Keep prospective members engaged,
- Introduce them to the club culture, and
- Create a pipeline for future full golf conversions.

Getting more people on property—even in a limited capacity—can help build long-term loyalty and broaden the club's member base.

Ancillary Membership Desires



The Club-Home Connection: Why Real Estate Matters More Than Ever

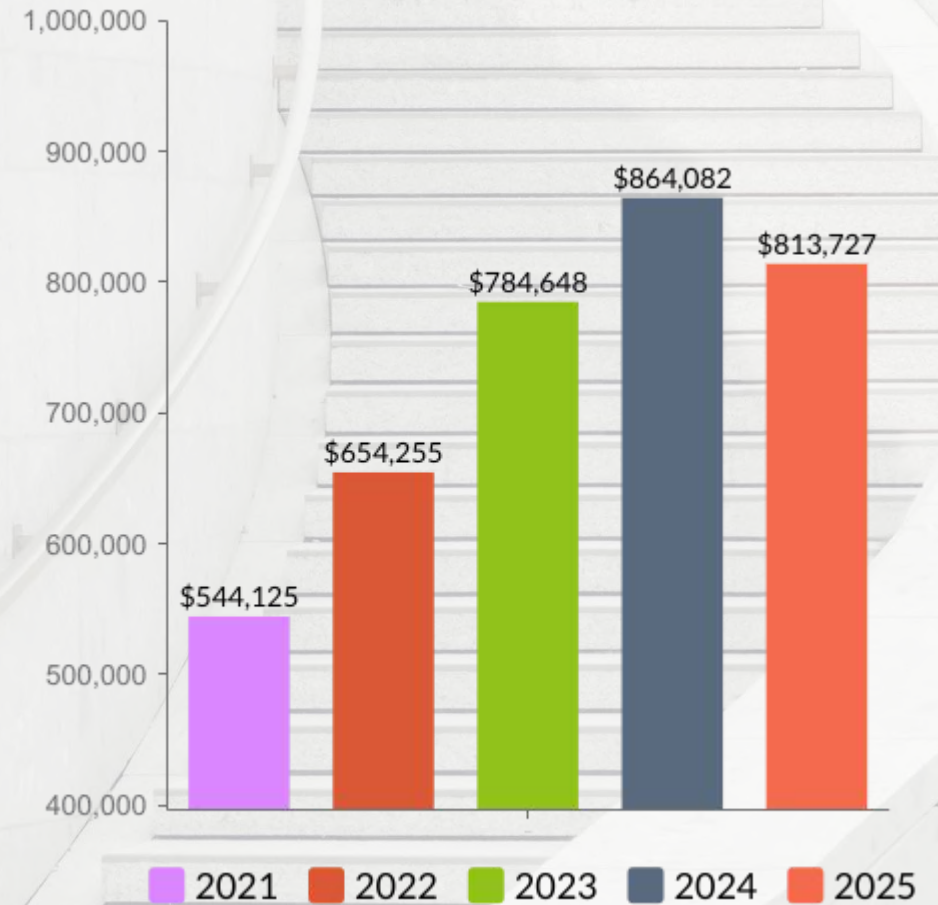
Golf Life Insights: Studies show that **8 out of 10 prospective golf members** are actively **combining their club search with a home search**. For today's buyer, club life is no longer just about the course—it's about the full lifestyle package.

This trend makes it imperative for clubs to **embrace real estate awareness** in and around their community. By doing so, clubs can:

- Stay informed on local housing inventory and pricing trends,
- Provide valuable guidance to prospective members during their visit,
- And **build strategic relationships** with real estate professionals to enhance the membership sales process. (*contact your local Golf Certified Real Estate Agent!*)

Bottom line: Real estate is now a **critical touchpoint** in the membership journey. Clubs that stay close to this part of the conversation will be better positioned to attract and convert the modern golf lifestyle buyer.

Average Real Estate Budget



Trend Alert: Shift Away from Gated Golf Communities

Golf Life Insights: We're seeing the return of a pre-COVID trend—and it may present challenges for traditional gated golf communities.

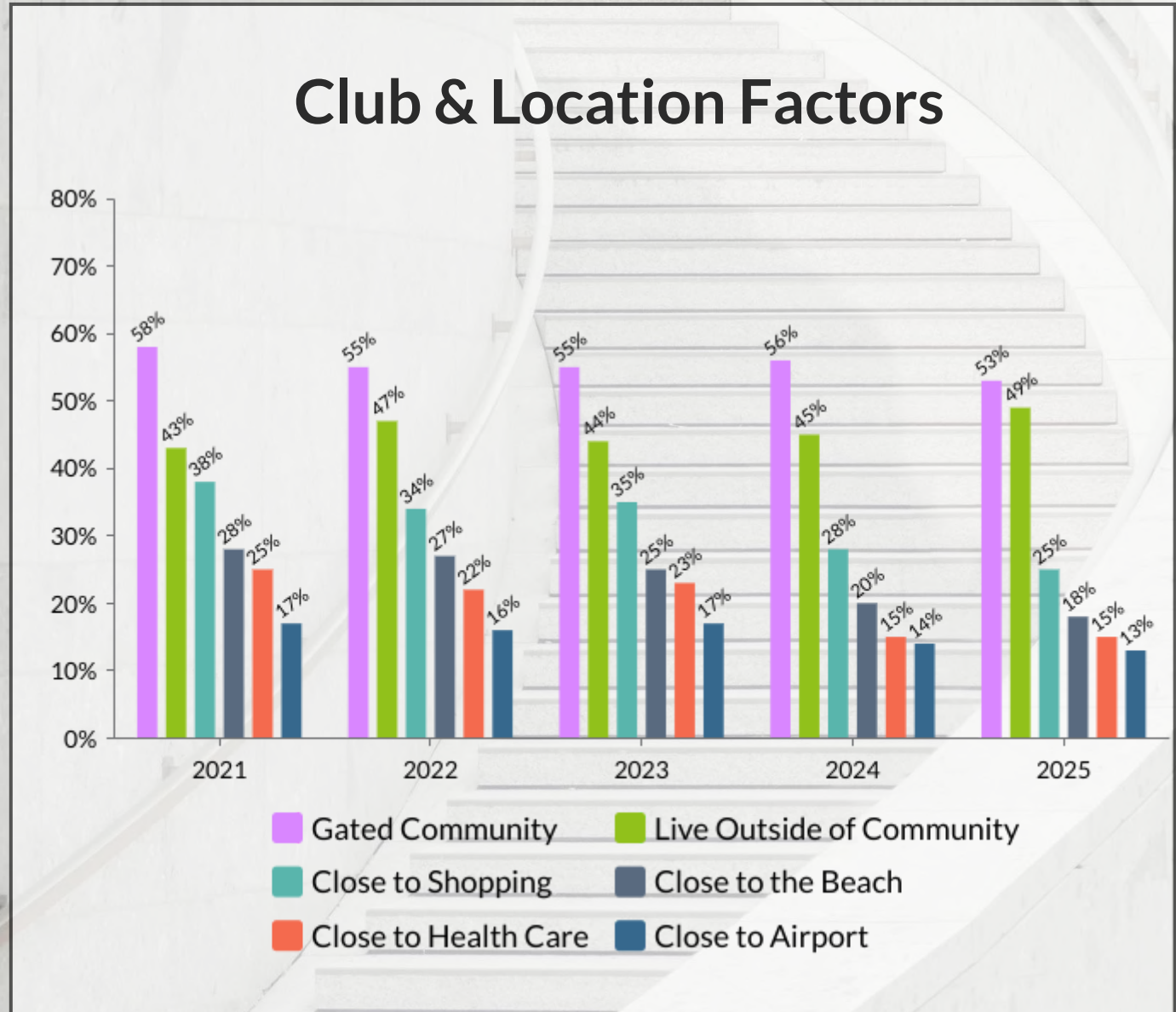
As of mid-2025, 49% of prospective members prefer to live outside the gates of their club community, opting for non-resident membership instead. This marks a significant shift and reflects growing consumer interest in more flexible living arrangements beyond HOA-restricted environments.

What does this mean for clubs?

- It's critical to monitor and adapt to this trend.
- Clubs should proactively address misconceptions about life within gated communities and clearly communicate the value and benefits of residency.

At the same time, offering compelling non-resident membership options may help attract a broader audience.

This evolving preference underscores the need for clubs to remain agile and meet consumers where they are—not just on the course, but in their lifestyle choices.



Health & Wellness: A Driving Force Behind Club Membership

Golf Life Insights: One of the **top motivating factors** for joining a private club continues to be the pursuit of a **healthier lifestyle**—and the data backs it up.

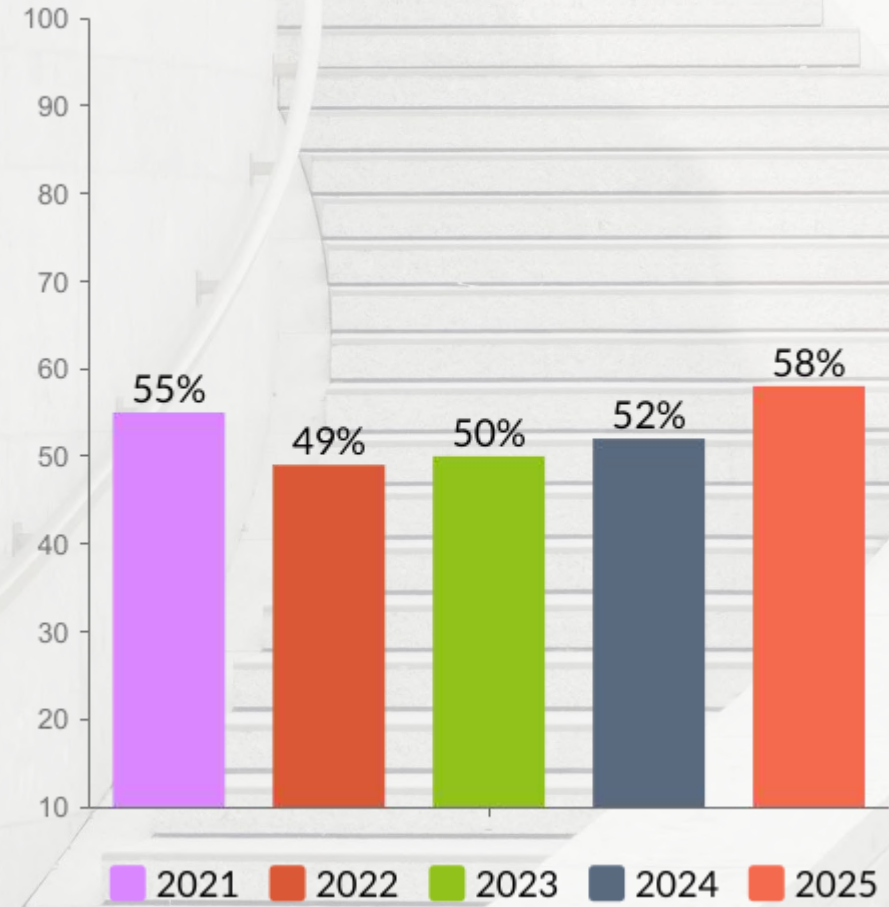
So far in 2025, we've seen a **6% increase in demand for health and wellness programming and equipment** at clubs. This reflects a growing expectation among prospective members that their club will support not only their social and recreational lives, but also their overall **physical and mental well-being**.

What this means for clubs:

- Invest in **modern fitness facilities and equipment**
- Expand **wellness programming** (yoga, nutrition, recovery services)
- Promote your club as a **hub for healthy living**, not just golf

Meeting this demand isn't just a nice-to-have—it's becoming a **core part of the value proposition** for today's club member.

Those Interested in Health & Wellness

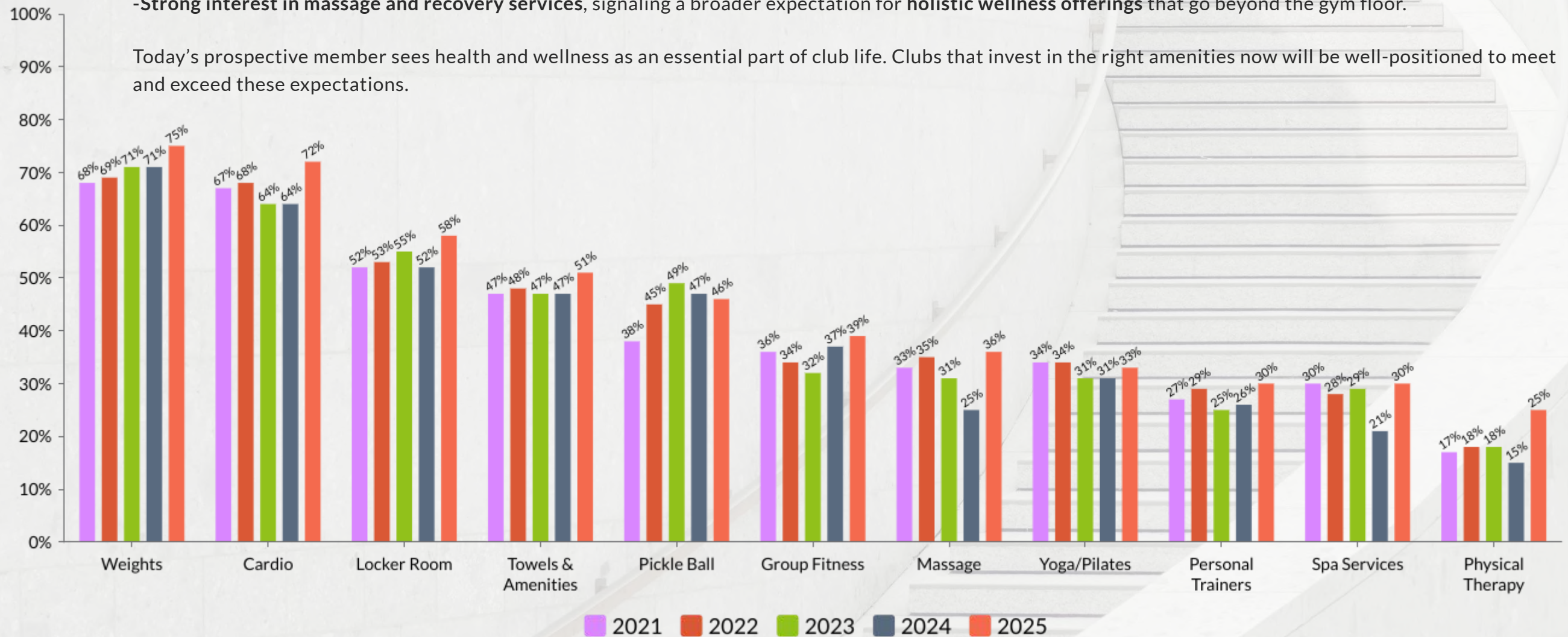


Rethinking Wellness: What Tomorrow's Member Values Most

Golf Life Insights: As you evaluate your club's fitness amenities and wellness programming, take a close look at the chart below. It highlights the most important aspects of health and wellness—as seen through the eyes of tomorrow's member. Two standout insights from 2025 data:

- High demand for state-of-the-art cardio equipment, reflecting the importance of modern, functional fitness spaces.
- Strong interest in massage and recovery services, signaling a broader expectation for holistic wellness offerings that go beyond the gym floor.

Today's prospective member sees health and wellness as an essential part of club life. Clubs that invest in the right amenities now will be well-positioned to meet and exceed these expectations.



Food & Beverage: A Key Ingredient in the Decision-Making Process

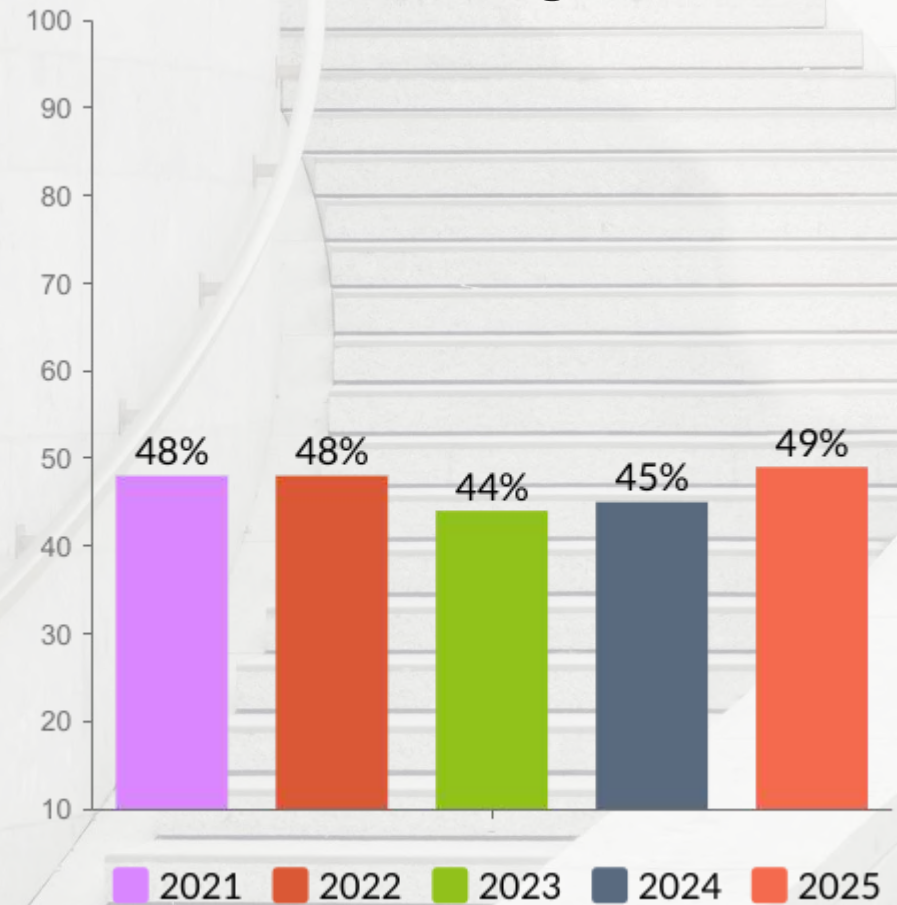
Golf Life Insights: A strong food and beverage operation plays a significant role in a prospect's impression of your club. In fact, roughly 1 in 2 buyers report that the quality and variety of F&B services are top of mind during their club visit.

This means clubs must go beyond just offering a good meal—they should:

- Showcase F&B prominently during tours
- Feature menus and dining experiences online
- Offer flexible, lifestyle-driven dining options that appeal to both traditional and modern tastes

Tomorrow's club buyer is looking for more than golf—they're looking for a vibrant, full-service experience. Make sure your F&B offering is part of the story you're telling.

Those Interested in Food & Beverage

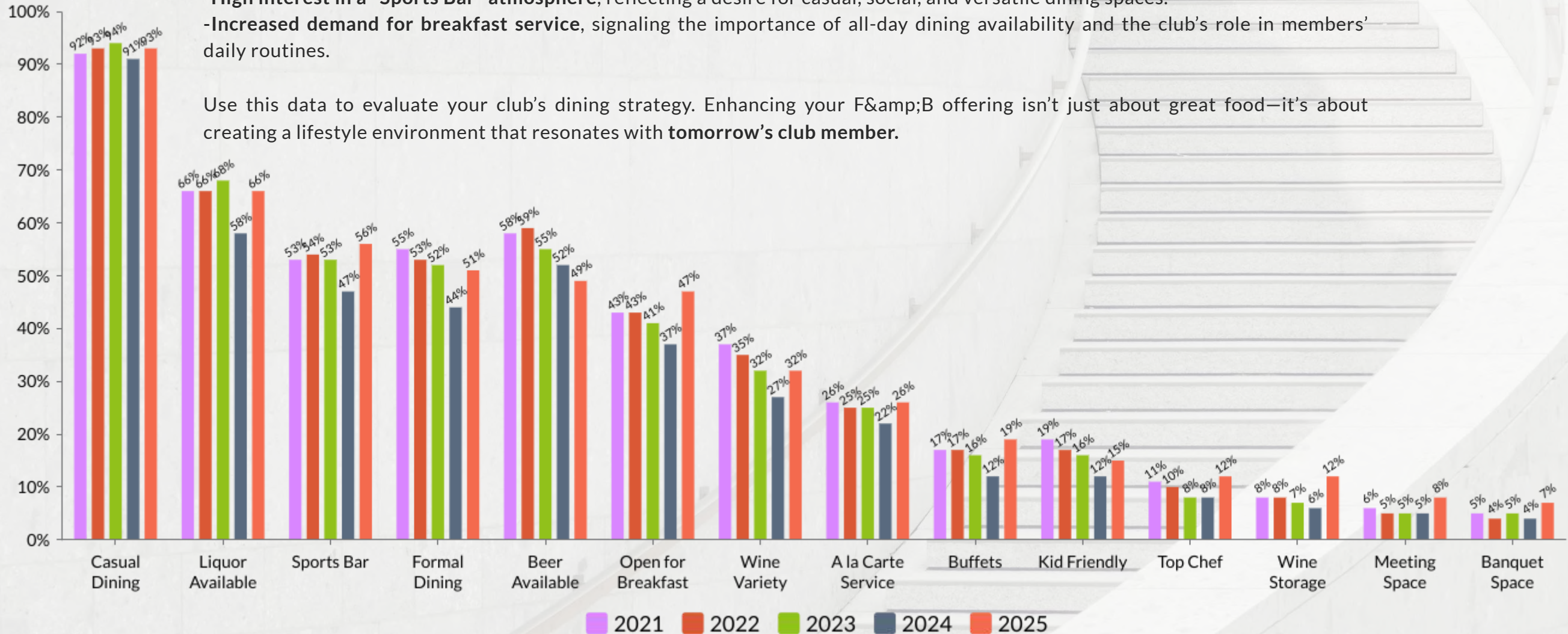


What Prospects Want from Club Dining: Key Trends for 2025

Golf Life Insights: The data below reveals **strong demand for a superb food & beverage operation** as part of the ideal club experience. As you review the figures, consider how your club's F&B offerings align with current consumer expectations. Two standout trends to note:

- High interest in a "Sports Bar" atmosphere**, reflecting a desire for casual, social, and versatile dining spaces.
- Increased demand for breakfast service**, signaling the importance of all-day dining availability and the club's role in members' daily routines.

Use this data to evaluate your club's dining strategy. Enhancing your F&B offering isn't just about great food—it's about creating a lifestyle environment that resonates with **tomorrow's club member**.



The Pool Matters: A Lifestyle Amenity Gaining Attention

Golf Life Insights: An interesting trend is emerging—44% of prospective club members are placing meaningful value on the **pool operation** when evaluating a club. For clubs currently considering whether to invest in or upgrade this amenity, this data could be the tipping point.

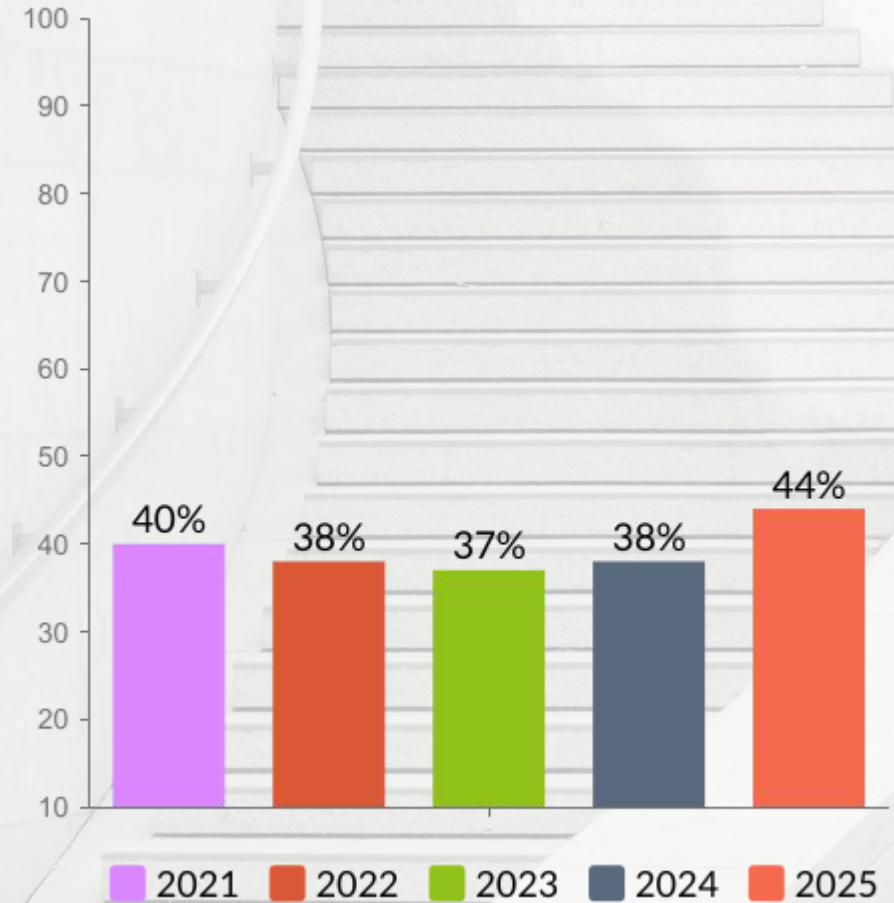
Even more compelling:

-55% of golfers indicate they would value **food and beverage service at the pool**, reinforcing the importance of integrating lifestyle and hospitality into recreational spaces.

Takeaway:

The pool is no longer just a family feature—it's becoming a key component of the **modern club experience**. Clubs that embrace this trend can broaden their appeal and enhance year-round member satisfaction.

Those Interested in a Clubhouse Pool



“Clubs Within the Club”: The Hidden Catalyst Behind Membership Decisions

Golf Life Insights: One of the most powerful—but often overlooked—drivers of membership commitment is the presence of “clubs within the club”: member-led groups centered around shared interests such as wine, travel, pickleball, book clubs, or wellness.

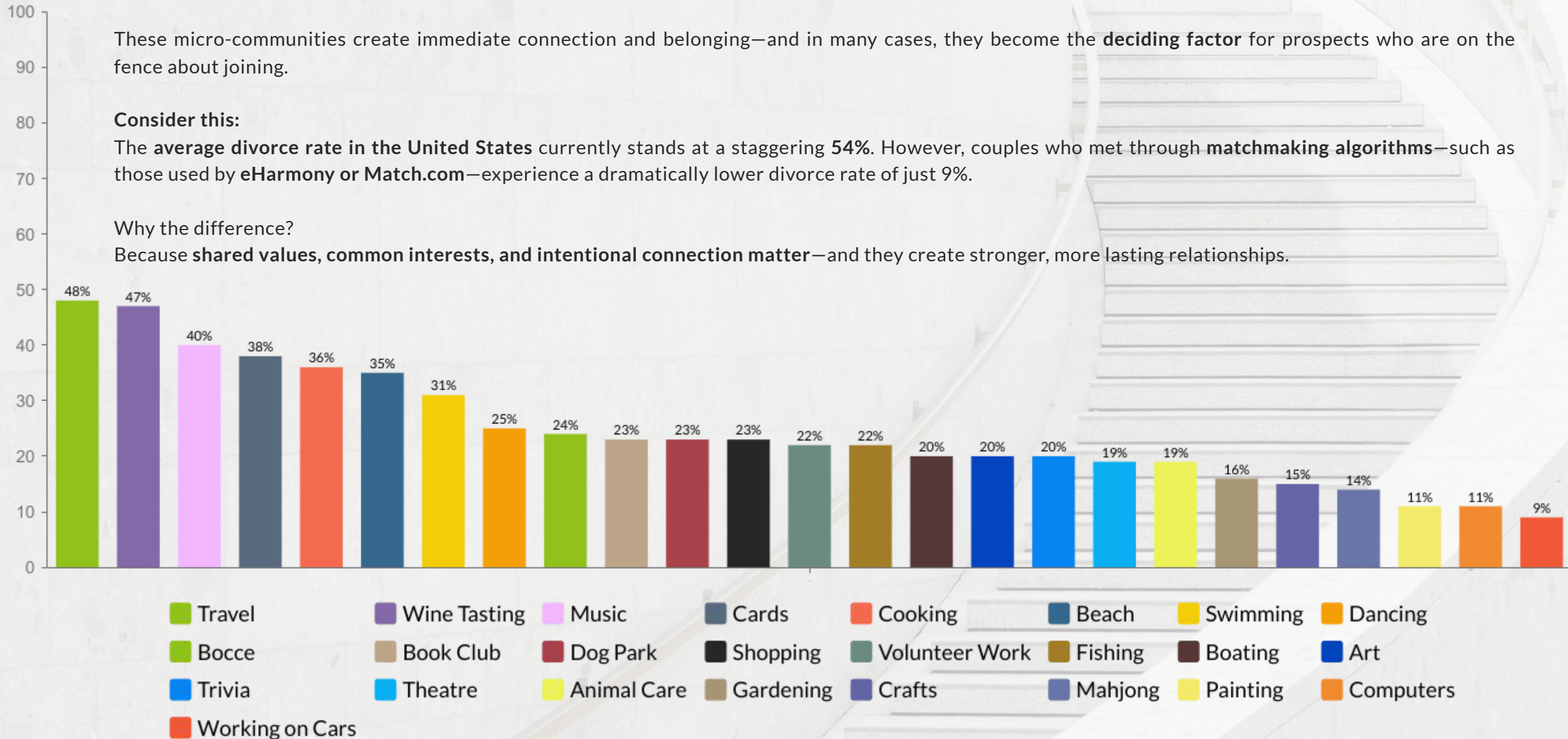
These micro-communities create immediate connection and belonging—and in many cases, they become the **deciding factor** for prospects who are on the fence about joining.

Consider this:

The **average divorce rate in the United States** currently stands at a staggering **54%**. However, couples who met through **matchmaking algorithms**—such as those used by **eHarmony** or **Match.com**—experience a dramatically lower divorce rate of just **9%**.

Why the difference?

Because **shared values, common interests, and intentional connection matter**—and they create stronger, more lasting relationships.

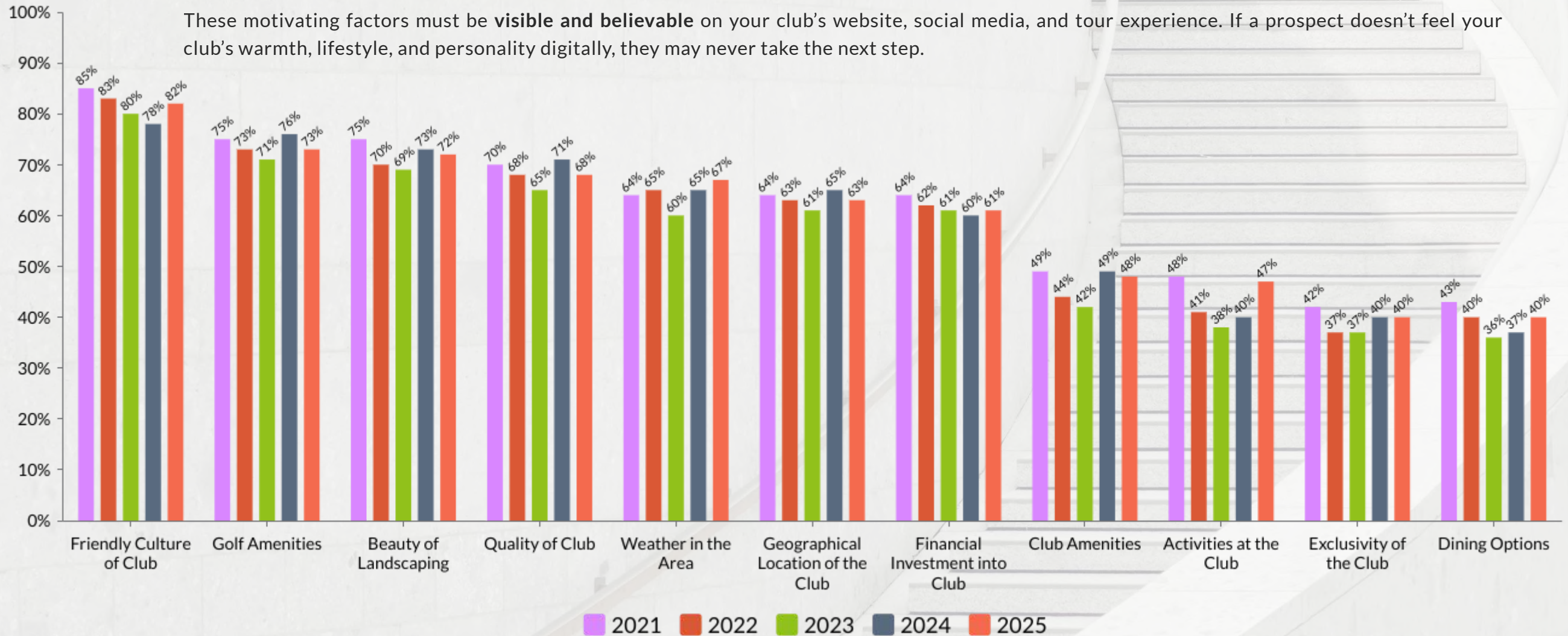


External Motivation: What Really Motivates Someone to Join a Club

Golf Life Insights: Want to know what's driving people to seek out private clubs in 2025? The data below lays it out clearly—and every single motivator is a marketing opportunity.

From the “friendly culture of the club” to the “weather in the area”, these are the emotional and practical triggers that influence the decision to engage, visit, and ultimately join. Here's the key insight:

These motivating factors must be **visible and believable** on your club's website, social media, and tour experience. If a prospect doesn't feel your club's warmth, lifestyle, and personality digitally, they may never take the next step.



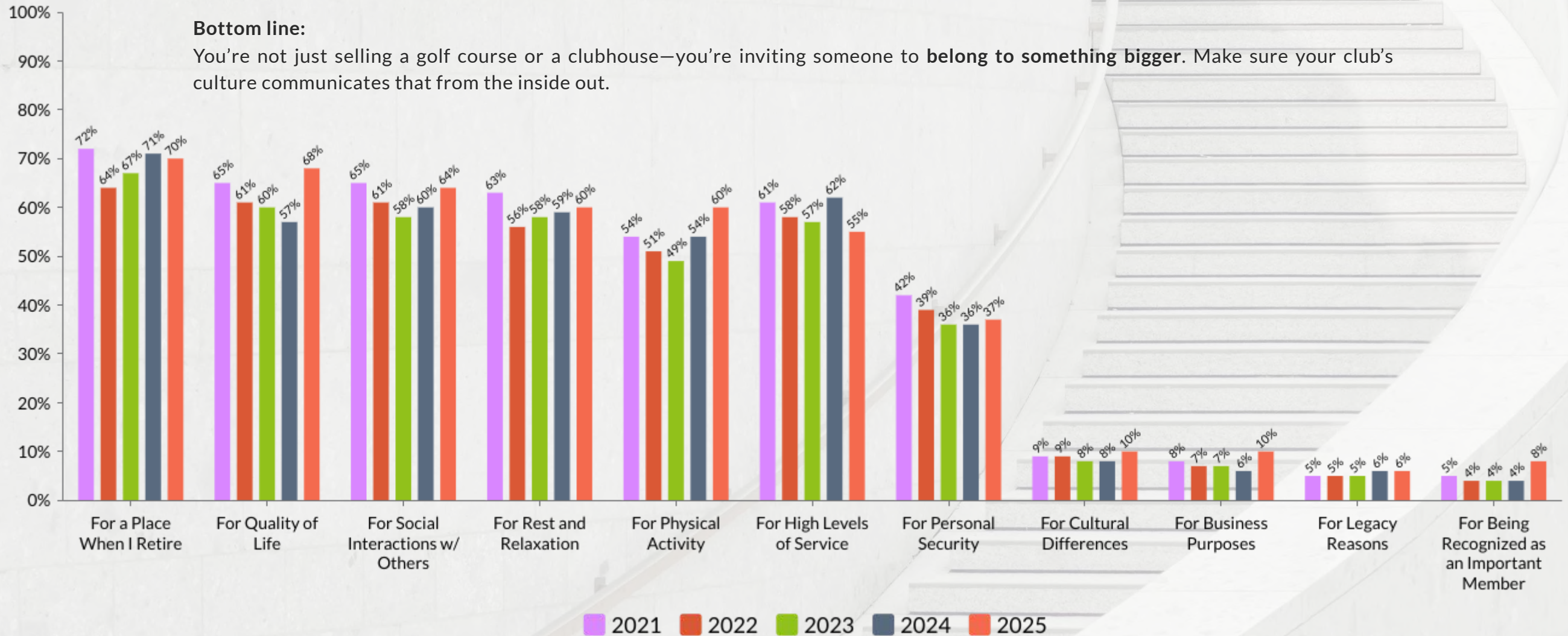
Internal Motivating Factors That Drive Membership Decisions

Golf Life Insights: While external motivators (like amenities, weather, and location) influence a prospect's first impression, it's the internal motivating factors that often seal the deal—and keep members engaged for the long term.

These deeper drivers—things like **belonging, purpose, connection, and values alignment**—must be woven into the fabric of your club's identity.

Bottom line:

You're not just selling a golf course or a clubhouse—you're inviting someone to **belong to something bigger**. Make sure your club's culture communicates that from the inside out.



Jason's Top Five Trends to Watch Closely

1. Full Golf Membership Demand Remains Strong

Nearly **90%** of **Golf Life Navigators** users are seeking full golf memberships.

These golfers are **highly engaged**, playing 3–4 days per week and striving toward single-digit handicaps.

Takeaway: Clubs should continue prioritizing full golf membership offerings and tailor marketing to serious golfers.

2. Real Estate and Club Search Are Deeply Linked

8 out of 10 prospects are combining their club and home search.

The **12–14 month decision window** requires clubs to stay top-of-mind and involved early in the journey.

Takeaway: Clubs must embrace real estate partnerships, offer local market insights, and highlight community integration.

3. Growing Interest in Non-Resident Memberships

49% of prospects now prefer to live outside the gates of the club, signaling a shift away from traditional gated community expectations.

Takeaway: Clubs should offer flexible membership models and address common misconceptions about HOA living.

4. Lifestyle Amenities Are Gaining Traction

Strong interest in **wellness programming**, **modern fitness**, **poolside F&B**, and **diverse dining options** (e.g., sports bars, breakfast service).

Takeaway: To attract tomorrow's members, clubs must evolve beyond golf and invest in lifestyle-forward amenities.

5. Belonging & Culture Drive Long-Term Engagement

“Clubs within the club” (interest groups) and **internal motivating factors** like community, culture, and shared values are key to member satisfaction and retention.

Takeaway: Leadership and staff should reinforce these themes in the mission, messaging, and member experience.

Thank you!

For questions on the data presented,
feel free to call or email at anytime.

Be well.

Jason Becker, CEO
Golf Life Navigators
jason@golflifenavigators.com
(239) 292-9929

www.golflifenavigators.com

