

An aerial photograph of a golf course, showing a large green on the right and several sand traps on the left. The text is overlaid on the image.

“Best Tees” Discussion

Results from USGA Golfer Experience Research

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Objectives for Today's Discussion

1. Discuss how the USGA is impacting the future of golf courses
2. Share some USGA research results on “best tees” and playing lengths preferred by golfers
3. Demonstrate that forward tees benefit more than just short hitters

An aerial photograph of a golf course. On the right side, there is a large, circular green with a distinct mowed pattern. To the left of the green is a sand trap with several smaller, irregularly shaped sand areas. The surrounding grass is a mix of green and brown, suggesting some dry patches or different grass types. The overall scene is captured from a high angle, looking down on the course.

How the USGA is impacting the future of golf courses

OUR VISION:

A thriving, welcoming
and sustainable game



USGA stands for:

Unify



Govern



Our purpose is to **U**nify the golf community, to **S**howcase the golfers who inspire us, to **G**overn the sport to ensure a solid foundation and to **A**dvance the good of the game, for the next 100 years and beyond.

Showcase



Advance



USGA Core Pillar - Advance

What We Do:

Through the Green Section, we provide innovative products, services, tools and solutions to golf courses, clubs and golf associations that improve the quality of the on-course experience and reduce the consumption of critical resources by golf courses.

How We Do It:

- Research
- Education
- Tools
- Consulting



Some golfers want more...

In a study of customer satisfaction, only 69% of golfers reported being satisfied with their experience - this ranks similar to the customer satisfaction of the Federal Government, Airlines and Health Insurance companies.



The Opportunity

By monitoring and improving golfer satisfaction, we believe that the industry can build on 2020/2021 and continue to:

- Grow demand
- Increase revenue
- Improve profitability

Maximizing satisfaction is critically important to providing value for the golfer's time and money!

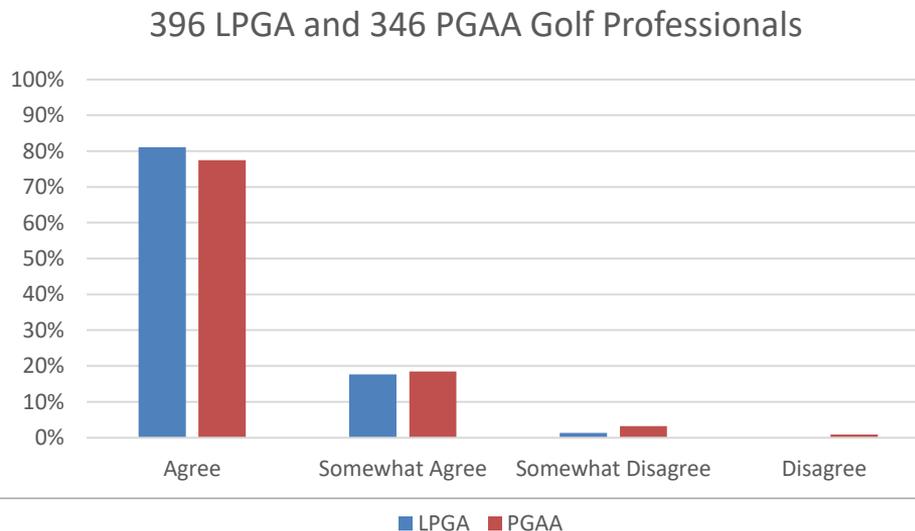
A wide-angle shot of a golfer in mid-swing on a lush green tee box. The golfer is wearing a light-colored shirt, dark pants, and a hat. To the right, a blue and white golf cart is parked. The background is filled with tall, dense evergreen trees under a bright sky. The overall scene is a serene and professional golf course setting.

Golfer Perspective on “Best Tees”

What is a “Best Tee” for a golfer?

LPGA and PGAoA Golf Professionals were asked:

How do you feel about this statement: “A set of tees is a good fit for a golfer’s ability when it allows them to comfortably reach the fairway on par 4s and par 5s, reach most greens in regulation, and allows them to hit a variety of clubs on their approach shots.”



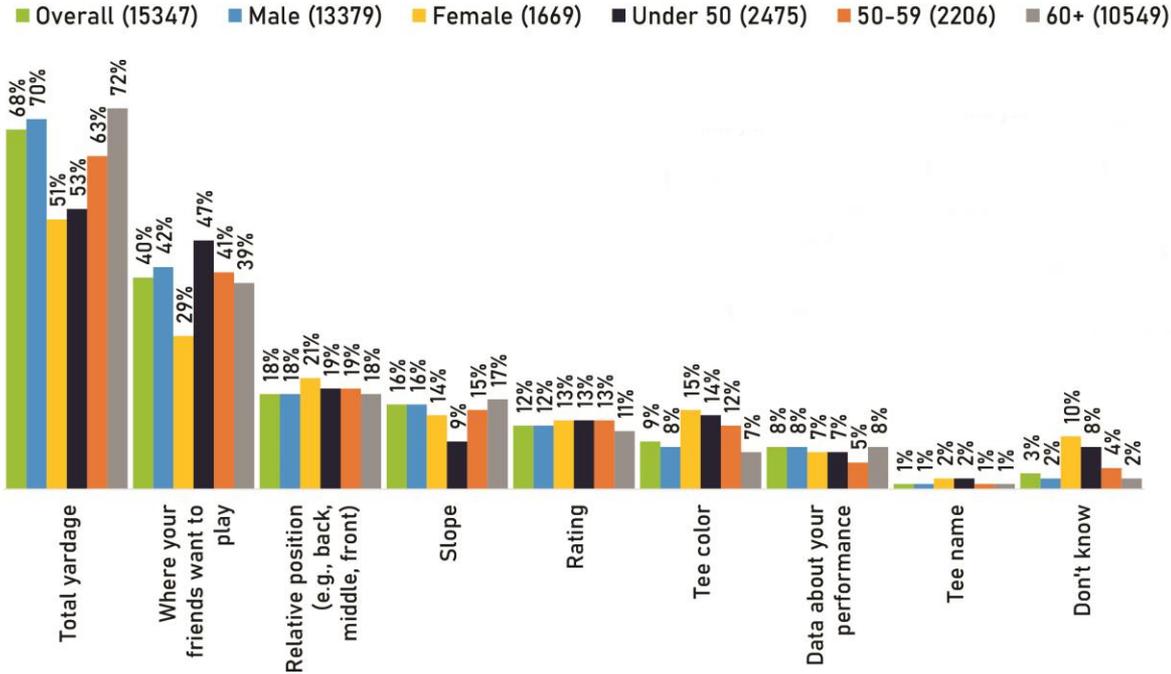
In other words, if a golfer plays a “Best Tee”

With *good* shots on *most* holes, *all* golfers should be able to make a 2-putt par and have *birdie chances* without constantly using the longest clubs in their bag!!

How do golfers select a tee to play?

TEE SELECTION | Tee selection criteria

Q. When playing golf, what are the two most important criteria when you choose a set of tees?



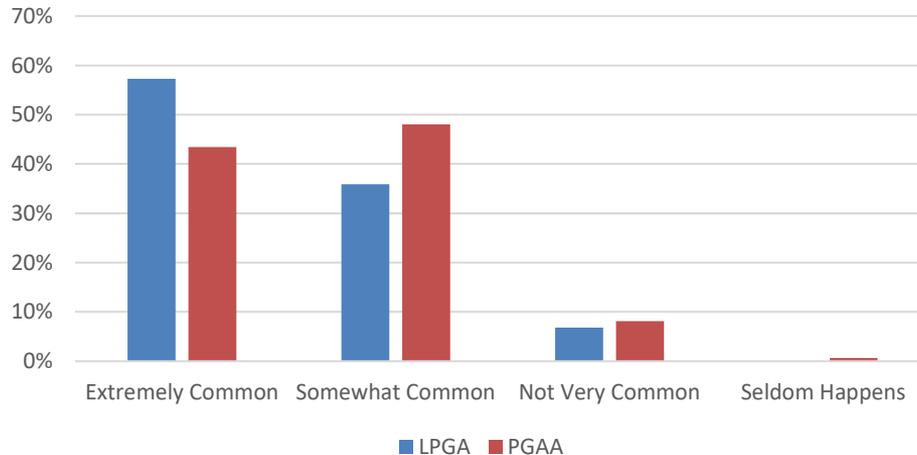
Key Finding:
Most golfers do not choose tees based on data regarding their actual ability.

Do golfers play “Best Tees”?

>99% LPGA and PGAoA Golf Professionals believe golfers have a better experience when they play from tees that fit their ability.

When asked: In your experience, how common is it for golfers to choose a set of tees that is too long for their ability?

396 LPGA and 346 PGAA Golf Pros



Summary of Golfer Behaviors Assessment: Comparing Three Systems Using Two Methods

Method

Longleaf System

Tee It Forward

Setting up for Success

1

	Population		
	Too Short	Appropriate	Too Long
Male	5.09%	18.86%	76.05%
Female	1.88%	5.11%	93.02%

	Population		
	Too Short	Appropriate	Too Long
Male	3.82%	16.23%	79.95%
Female	1.56%	3.75%	94.82%

	Population		
	Too Short	Appropriate	Too Long
Male	45.35%	38.56%	16.09%
Female	13.38%	32.25%	54.37%

2

	Population		
	Too Short	Appropriate	Too Long
Male	19.91%	18.28%	61.79%
Female	7.53%	11.96%	80.49%

	Population		
	Too Short	Appropriate	Too Long
Male	12.28%	20.02%	67.69%
Female	2.36%	8.06%	89.56%

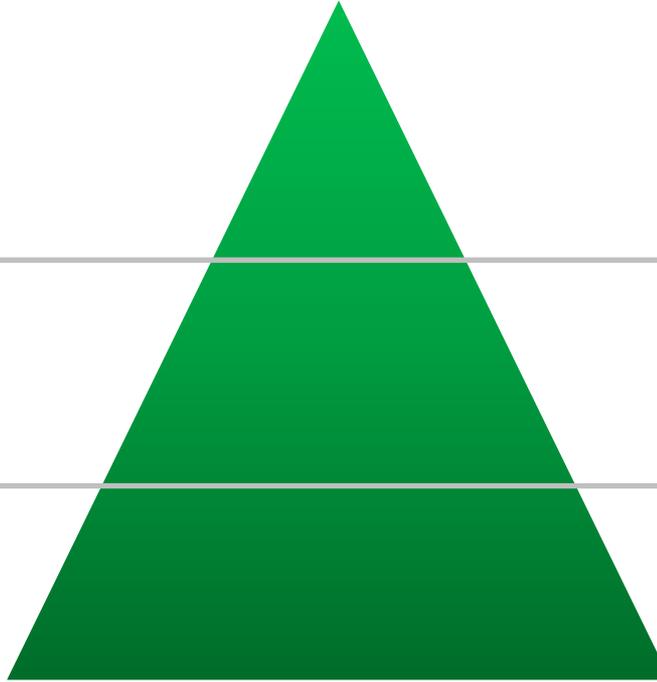
	Population		
	Too Short	Appropriate	Too Long
Male	31.36%	20.59%	48.04%
Female	12.02%	15.53%	72.44%

Key Finding: USGA Score Posting Analysis estimates about half of men and three-quarters of women play too long a course.

- Higher handicap golfers are more prone to playing too long a course compared to lower handicap golfers.
- Low handicap golfers have the skill to play longer courses, but typically don't. They like birdie opportunities!

Why don't golfers play “Best Tees”?

- Ego
 - Peer pressure
 - Creatures of habit
-
- Gender/Age Stigmas
 - Overestimated Ability
-
- Lack of “Enlightenment”
 - Lack of Options

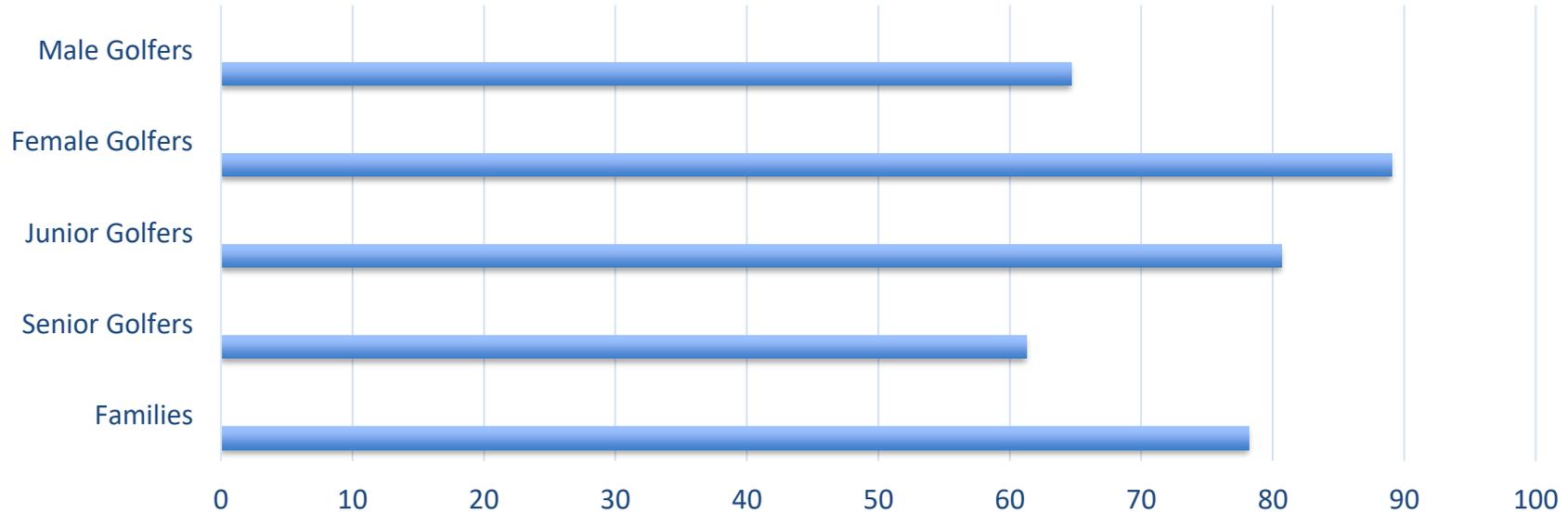


A wide-angle photograph of a golf course. In the center, a golfer wearing a grey shirt and a hat is captured mid-swing on a green tee box. To the right, a blue and white golf cart is parked. The foreground is a well-maintained green lawn with a few scattered golf balls. The background is filled with tall, dense evergreen trees under a bright sky. The overall scene is peaceful and scenic.

Facility Perspective on “Best Tees”

Golf Facility Goals

Question: Do you plan to focus on attracting more golfers from any of the following groups?

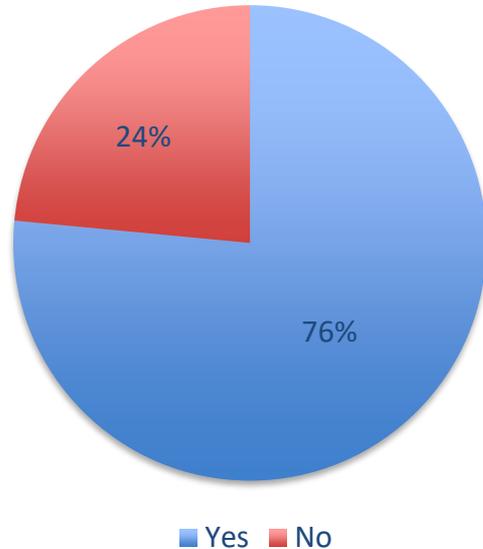


Percentage of 119 NGCOA members surveyed who hope to attract more golfers from these groups.

Results – Golf Facility Goals

Question: Would you like to improve pace of play at your course?

NGCOA Members



GOLFER EXPERIENCE and “BEST TEES”

Golf Facility Goals

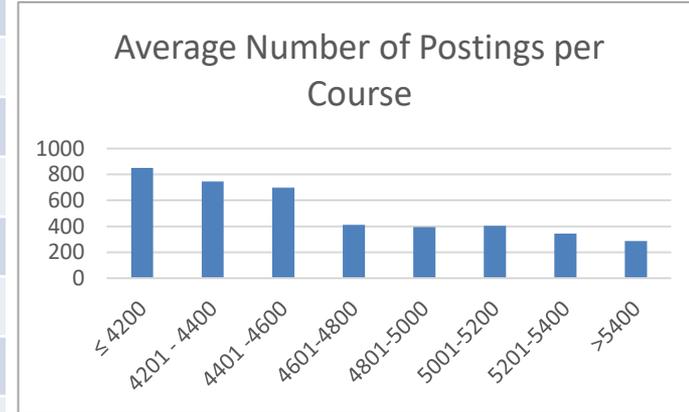


Key Finding:
Golf facilities want to improve pace of play and attract more players, including those with shorter hitting distances. Additional teeing options could help them achieve these goals.

Female Scores Posted by Front Tee Length

As overall front tee length decreases, the average number of postings by female golfers increases

Front Tee Course Length (yds)	Scores Posted	Postings / Course
≤ 4200	1,799,884	850
4201 - 4400	587,395	746
4401 -4600	791,312	699
4601-4800	676,323	412
4801-5000	987,697	394
5001-5200	1,134,335	405
5201-5400	670,126	345
>5400	419,783	286
Total	7,066,855	Avg = 517



What Teeing Options Do Golfers Use?

Male Golfer Tee Usage

Overall Course Length (yards)	Back Tee Usage	All Middle Tees Usage	Front Tee Usage
≤ 6,000	45%	43%	12%
6,001-6,200	30%	62%	8%
6,201-6,400	25%	68%	7%
6,401-6,600	14%	80%	5%
6,601-6,800	8%	87%	5%
6,801-7,000	5%	91%	4%
≥ 7,000	3%	94%	3%

Female Golfer Tee Usage

Forward Tee Course Length (yards)	Back Tee Usage	All Middle Tees Usage	Front Tee Usage
≤ 4,200	3%	86%	12%
4,201-4,400	3%	74%	23%
4,401-4,600	5%	58%	37%
4,601-4,800	5%	45%	50%
4,801-5,000	5%	33%	61%
5,001-5,200	6%	24%	70%
5,201-5,400	7%	19%	75%
≥ 5,400	8%	8%	84%

Key Finding: For gender equity of tee selection options, forward tees need to be less than 4200 yards

Teeing Options Key Findings



A golfer that hits tee shots an average of 150 yards would need a course length of ~4,400 yards to have 7-iron as the average approach club after a good tee shot.

28% of 18-hole U.S. courses offer a forward tee less than 4,600 yards. (Only 15% less than 4,200 yards)

Back tees longer than 6,600 yards are used by <8% of players.

A wide-angle photograph of a golf course. In the center, a golfer wearing a grey shirt and a hat is captured mid-swing on a green tee box. To the right, a blue and white golf cart is parked. The background is filled with tall, dense evergreen trees under a bright sky. The foreground shows a well-maintained green lawn with a few scattered golf balls.

Recommendations on “Best Tees”

Guiding Principle

- **Golf courses should have – and golfers should be encouraged and empowered to use – tees that are a good fit for individual hitting distances**

Caveats

- **Every golf course is different, so recommendations about improving golfer experience or teeing options are necessarily general and must be tailored to fit the unique needs and circumstances of an individual course**
- **All changes to golf course setup, presentation or design should be planned with input from relevant experts – e.g., golf course superintendent, golf course architect, golf professional**

How far do golfers hit shots?



Distribution of male and female total driving distance from a 2021 USGA golfer performance study of 300 players (234 male and 66 female) conducted in the field at several different golf facilities.

Distance Insights reported male average driving distance = 208 yards and female = 150 yards

What hole lengths do golfers prefer?

Hole Par	Shortest	Middle	Longest
3	Gap Wedge	6-iron	3-wood
4	Driver / Gap Wedge	Driver / 6-iron	Driver / 3-wood
5	Driver / 3-wood / Pitch shot	Driver / 3-wood / Pitching Wedge	Driver / 3-wood / 6-iron

- To accommodate over 90% of all golfers, available tees should range from about 3600 to 6800 yards for a standard 18-hole, par 72 course.

Tee option example

Playing length options can be a mix of physical or combination (blended) tees with 300 – 500 yards separating them. Here is an example for a standard 18-hole, par 72 course covering ~90% of golfers:

Tee	Tee Type	Playing Length (yds)		Comment
1	Physical	3600		
2	Blended / Combo		4000	
3	Physical	4400		Ave. Female
4	Blended / Combo		4800	
5	Physical	5200		
6	Blended / Combo		5600	
7	Physical	6000		Ave. Male
8	Blended / Combo		6400	
9	Physical	6800		

5 options for females

5 options for males

Short Enough Forward Tees Reduce Barriers

For the short hitting golfer

- They can reach greens in regulation

For longer, but not long hitting golfers

- They are more apt to move to a best tee when even shorter tees are available

Minimize excuses to use best tees

- Comparable quality of construction – “real tees”
- Use tee names or colors that do not carry gender- or age-related associations that could discourage use

Positive impacts of playing Best Tees

For the individual golfer

- Scoring improves
- Time need to play a hole is reduced (pace increases)
- Golfer satisfaction improves – they have more fun shooting lower scores!

For other golfers on the course

- Less waiting
- Golfer satisfaction improves

For the facility

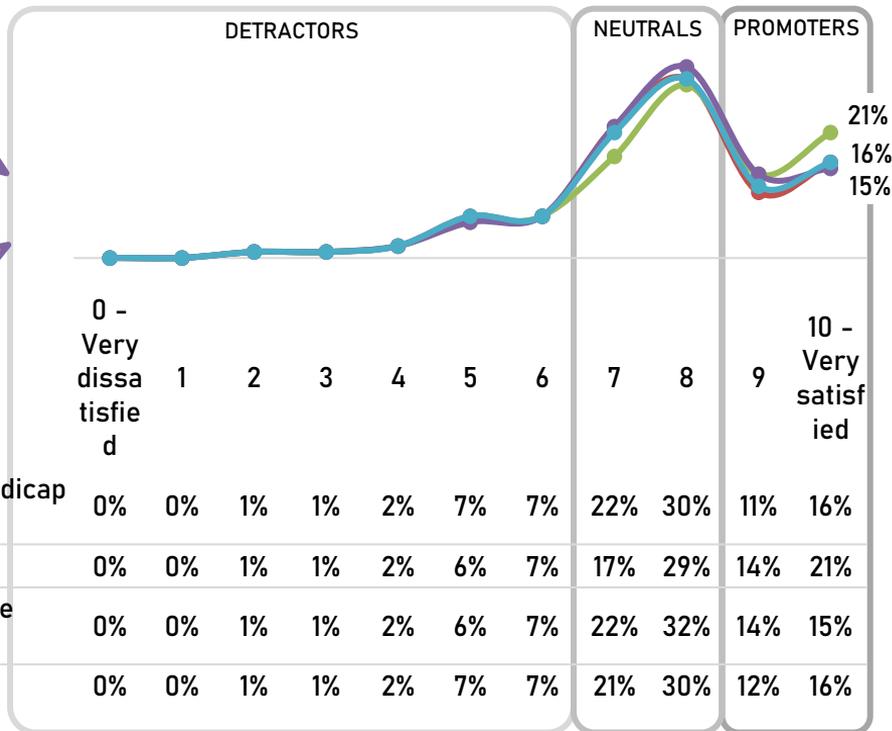
- More satisfied golfers – retention improved
- More rounds and more revenue

On-course Satisfaction

These four groups: 1) high / no handicappers, 2) short drivers, 3) those with low accuracy and 4) high scorers – were generally least satisfied with their typical golf experience.

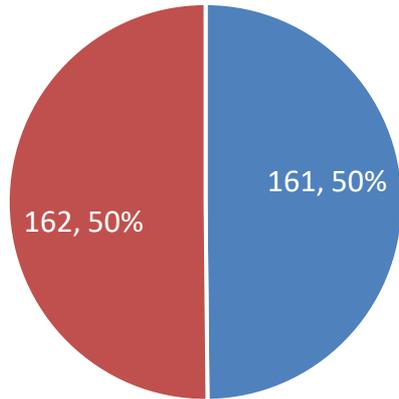
The least satisfied groups were more likely to be neutral (rating 7 or 8) or middling in their opinion (rating 5 or 6) than the most satisfied groups.

- Handicap: 29+ / no handicap (3047)
- Short drive (2615)
- Less than 50% accurate (4220)
- Score 100+ (2061)



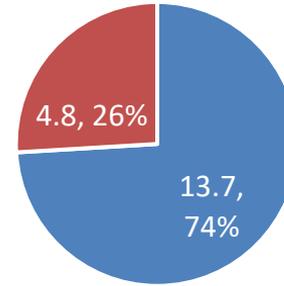
U.S. versus Golfing Populations in 2016

United States
(millions)



■ Male ■ Female

Golf
(millions)



■ Male ■ Female

Proportion of Golfers in U.S. by Gender	
Females	Males
3.0%	8.5%

What if golf was half female?

There would be 12.7 new golfers

- playing an additional 268 million rounds
- buying equipment or consumables
- and filling tee sheets!

At an average green fee of \$38/round, that is over \$10 billion of annual revenue for facilities not including food & beverage, clothing, equipment or consumables.

Why not?

Opportunities

Providing short enough tees for shorter hitting and less skilled golfers is a substantial opportunity.

Encouraging all golfers to play tees that match their hitting distance capability is a larger opportunity!

Questions?

Contact:

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THANK YOU!

USGA

FOR THE GOOD OF THE GAME.®



About the Data

- **Two USGA Databases Utilized**
 - **Central Computation Score Posting Data**
 - **Course Rating Service Data**
- **Scope of Data**
 - **Full Year – USA Only**
 - **18-hole postings only (no manual postings)**
 - **Active & Published Tee Sets**
- **Year = January 1 to December 31, 2020**
- **Timing of Data Access = February 2021**
- **13,877 U.S. CRS Courses with 100,762 Tee Sets**
- **Total number of data points ~55 million by ~2 million golfers in the United States**
 - **Male ~ 47 million scores posted (85%)**
 - **Female ~ 8 million scores posted (15%)**