

Tracking Research



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Objectives

- To gauge the impact of their efforts, the USGA has embarked upon a multi-year study to evaluate how new programs and communications efforts are:
 - Impacting the amount of time required to play golf
 - Golfer satisfaction levels
 - Golfer and golf facility awareness of and participation in pace of play initiatives
 - Evolving and changing perceptions among both golfers and facility operators across the country.
- To accurately measure and assess awareness and adoption among a broad constituency of avid, core and casual golfers as well as across a diverse range of facility types.



Methodology

- 2nd Annual wave of study initiated in Fall of 2013
- Parallel online quantitative surveys with quoted samples of facilities and golfers:
 - Golfers:
 - National external sample of 1,000 golfers
 - Augmented sample of USGA members, weighted to provide statistical consistency with benchmark wave distribution
 - Stable bases/mix of golfers
 - Avid
 - Core
 - Casual
 - Across US Census Regions; skill levels and experience
 - Across mix of facility types and fee levels

Methodology (continued)

- First Tracking Wave
- Parallel online quantitative surveys with quoted samples of facilities and golfers:
 - Golf Facilities:
 - National sample of 231 golf facilities drawn from USGA database to include a mix and stable bases of:
 - US Census regions
 - Private Clubs
 - Daily Fee facilities
 - Municipal facilities
 - Semi-Private facilities
 - Further stratification by fee structures for both private and public access facilities
- Field period—Sept. 15-Oct. 17, 2014
- Average survey length of 17 minutes

Two Minute Take-Aways

Pace of Play remains a critical driver of overall golfer enjoyment

- More than $\frac{3}{4}$ of golfers strongly agree that pace of play is critical in contributing to one's enjoyment of a round of golf.
- Pace of play remains fourth most critical of 21 potential elements affecting golfers' enjoyment of a round of golf...more important than even cost.
- For the second consecutive year, more than 10% of those who played less golf than a year ago, attributed their decrease in rounds played to "The pace of play/time it took to play a round has become prohibitive."

The "typical" 18-hole round of golf is still longer than what golfers desire

- Golfers continue to cite that the ideal length of a round of golf should be under four hours, while the point at which a round is too long as to take away from its enjoyment has increased fifteen minutes, to five hours in 2014.
- On average the length of typical weekday rounds has remained constant at four hours, year over year. However, weekend rounds have increased to 4:30.

Two Minute Take-Aways

“Bottlenecks” continue to be a source of consternation

- Facility operators continue to underestimate the impact of bottlenecks, which continue to be perceived by golfers to be more bothersome than the overall length of a round of golf.
- On average, golfers report waiting more than five minutes for the group in front of them to move out of range on the second par four or five on the course. A similar pattern is reported on approach shots into the first par four or five on the back nine.

Implementation and awareness of industry initiatives move in a positive direction

- More golfers report “teeing it forward” in 2014 vs 2013 in lockstep with stronger agreement that doing so increased enjoyment, and greater support by facility operators. However there is still significant skepticism.

Two Minute Take-Aways

All still place responsibility for improving pace of play on golfers.

- Over three quarters of golfers and facilities strongly agree that it is the responsibility of golfers to monitor pace of play in their group and encourage others to play faster. However less frequent players are significantly less likely to share this sentiment.
- Less frequent golfers are also significantly less likely to implement a number of best practices for speeding up play.

Not at my facility!....Operators Less likely to buy into the issue or the prospects for improvement

- Facility operators are much less optimistic than golfers that pace of play can be significantly improved at their facility, and they overwhelmingly deny that slow play is a major problem at their facility

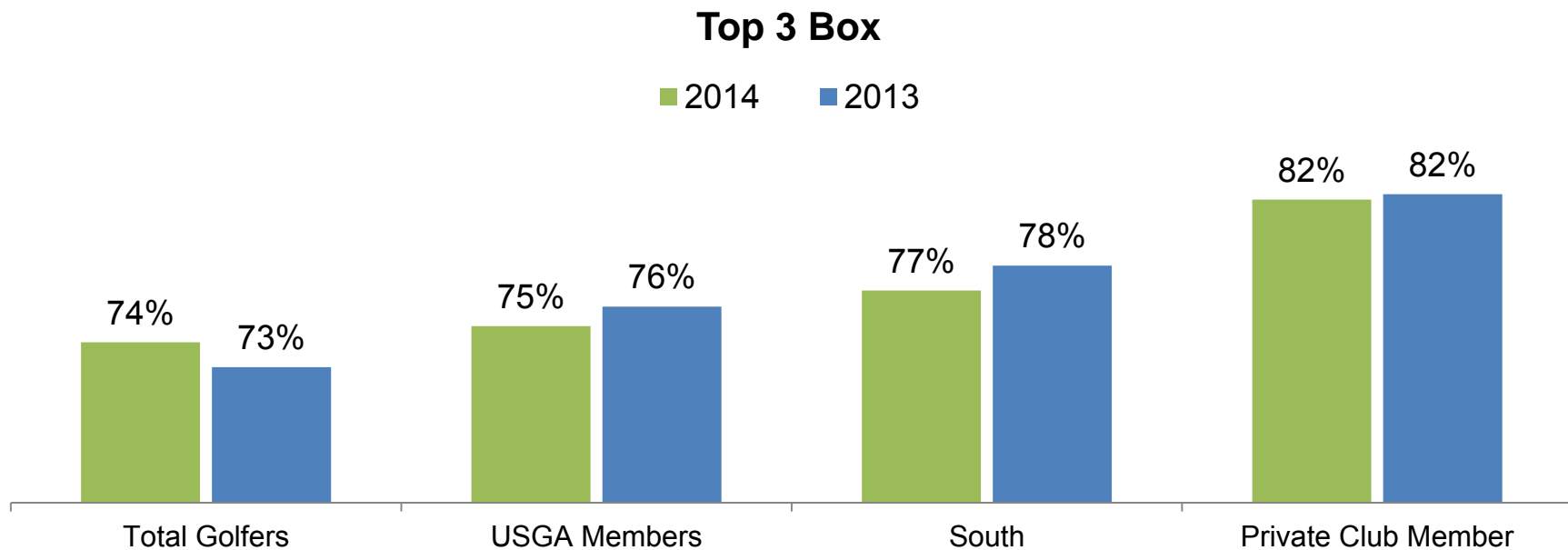
Summary Findings

PRESENTED BY THE **USGA** 

Consistent Overall Golfer Satisfaction Provides Initial Context

- Private Club members, Southerners continue to show stronger levels of enjoyment
- Significant year over year improvement among lowest fee public golfers

Q Thinking about your typical experience on the golf course that you play most often, please indicate how satisfied you are...



Pace of Play Still A critical Driver of Overall Enjoyment

- More than $\frac{3}{4}$ of golfers strongly agree that pace of play is critical in contributing to one's enjoyment of a round of golf.
- Pace of play remains fourth most critical of 21 potential elements affecting golfers' enjoyment of a round of golf...more important than even cost.

Q Please indicate how important each factor is in contributing to your overall enjoyment of the game

	2014	2013
The conditioning of the golf course	82%	82%
The people that you play with	76%	76%
Accessibility and tee time availability	75%	75%
Pace of play	74%	74%
Being able to play with people of my choosing	72%	70%
Cost/value	68%	68%
The physical beauty and aesthetics of the golf course	67%	69%
Appropriate directional signage on the golf course	54%	50%
Availability of drinking water at the tee boxes or on the golf cart	53%	49%
How well I play	53%	51%
The length of the holes on the golf course from tee to green	53%	52%

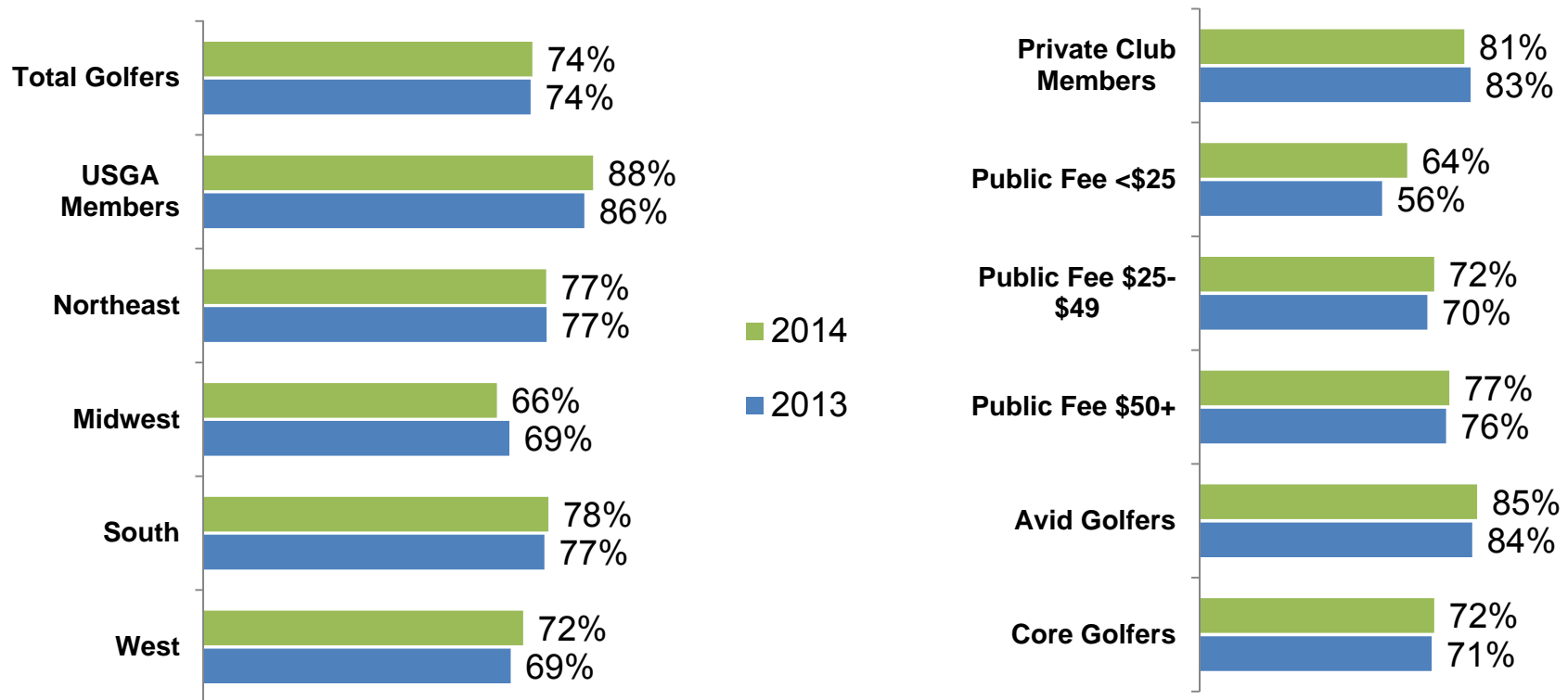
**Top 3 Box
Importance**

Pace of Play is More Critical for a Variety of Golfer Segments



Please indicate how important each factor is in contributing to your overall enjoyment of the game

Pace of Play Top 3 Box Importance



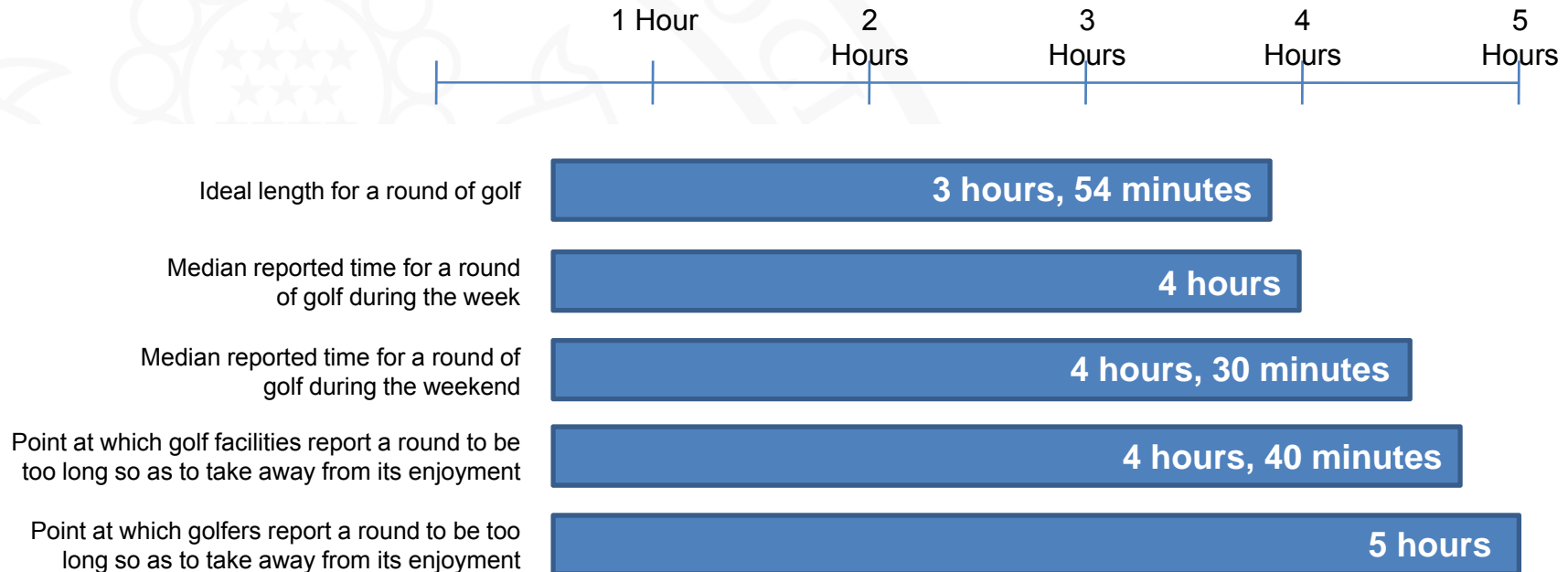
- For the second consecutive year, more than 10% of those who played less golf than a year ago, attributed their decrease in rounds played to "The pace of play/time it took to play a round has become prohibitive."

Length of the Ideal Round vs Length of the Typical Round

- Golfers continue to cite that the ideal length of a round of golf should be under four hours, while the point at which a round is too long as to take away from its enjoyment has increased fifteen minutes, to five hours in 2014.
- On average the length of typical weekday rounds has remained constant at four hours, year over year. However, weekend rounds have increased.



Length of the Ideal Round vs Length of the Typical Round

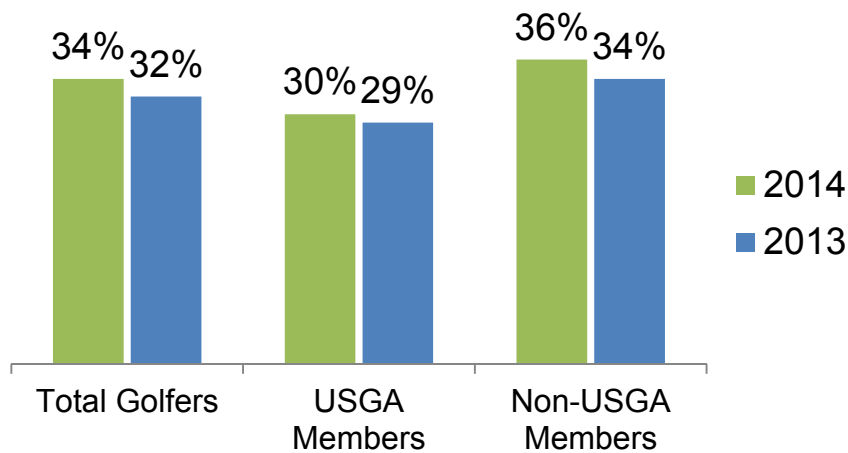


Base: USGA Members

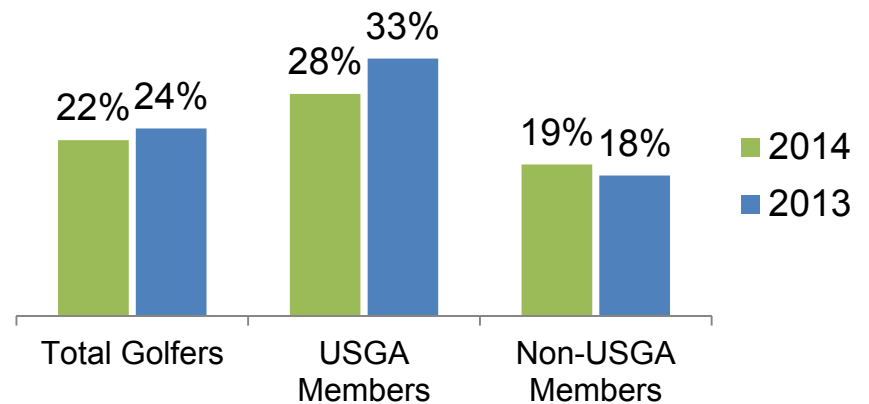
- Younger golfer (under age 40) tolerance for the length of a round of golf remains significantly lower than that of older golfers
- Average length of a round remains longest in the North East
- Public course players now report rounds 25 minutes longer on average than Private club members. This is up from a 16 minute differential in 2013.

On-Course Bottlenecks Grow More Bothersome than the Total Time Needed to Complete a Round of Golf

Q Which do you find more bothersome during a typical round of golf?



Waiting for groups ahead of me to clear out of range on particular holes



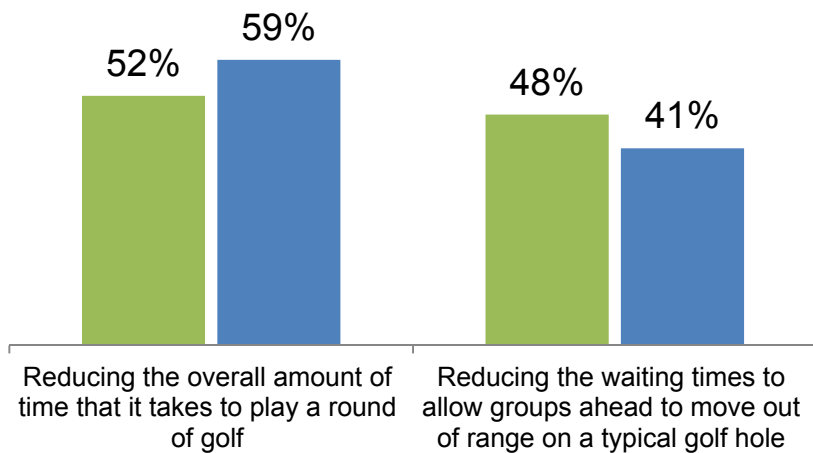
Taking more time than I'd like to play a round of golf

Golfers Now in Alignment with Facility Operators

- Continue to see reducing the total time to complete a round as significantly more critical than reducing bottlenecks

Q Which of the following would be more enjoyable for you?

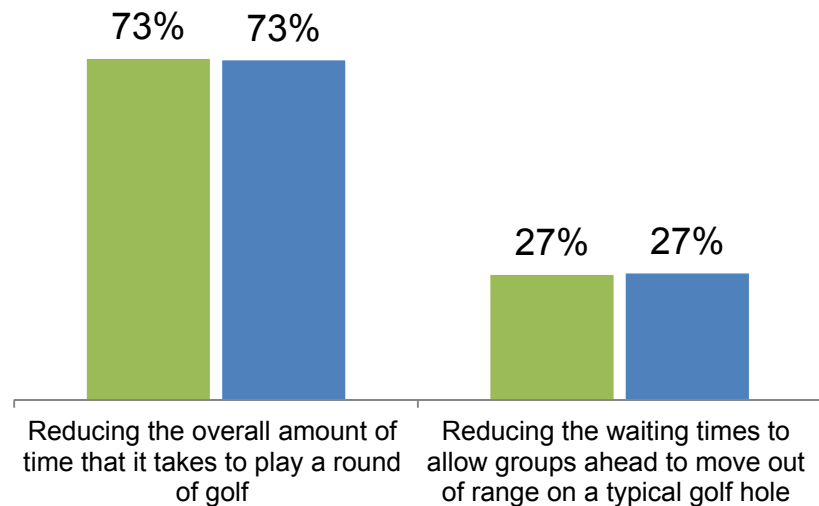
■ 2014 ■ 2013



USGA Members

Q Which of the following do you feel would be more enjoyable for golfers at your facility?

■ 2014 ■ 2013



Total Facilities

Still Big Gaps in Facility Operator vs Golfer Perceptions of Typical Bottlenecks

Q During a typical 18 hole round...how much time did **you/the average golfer** wait for the group in front of **you/them** to move out of range before....

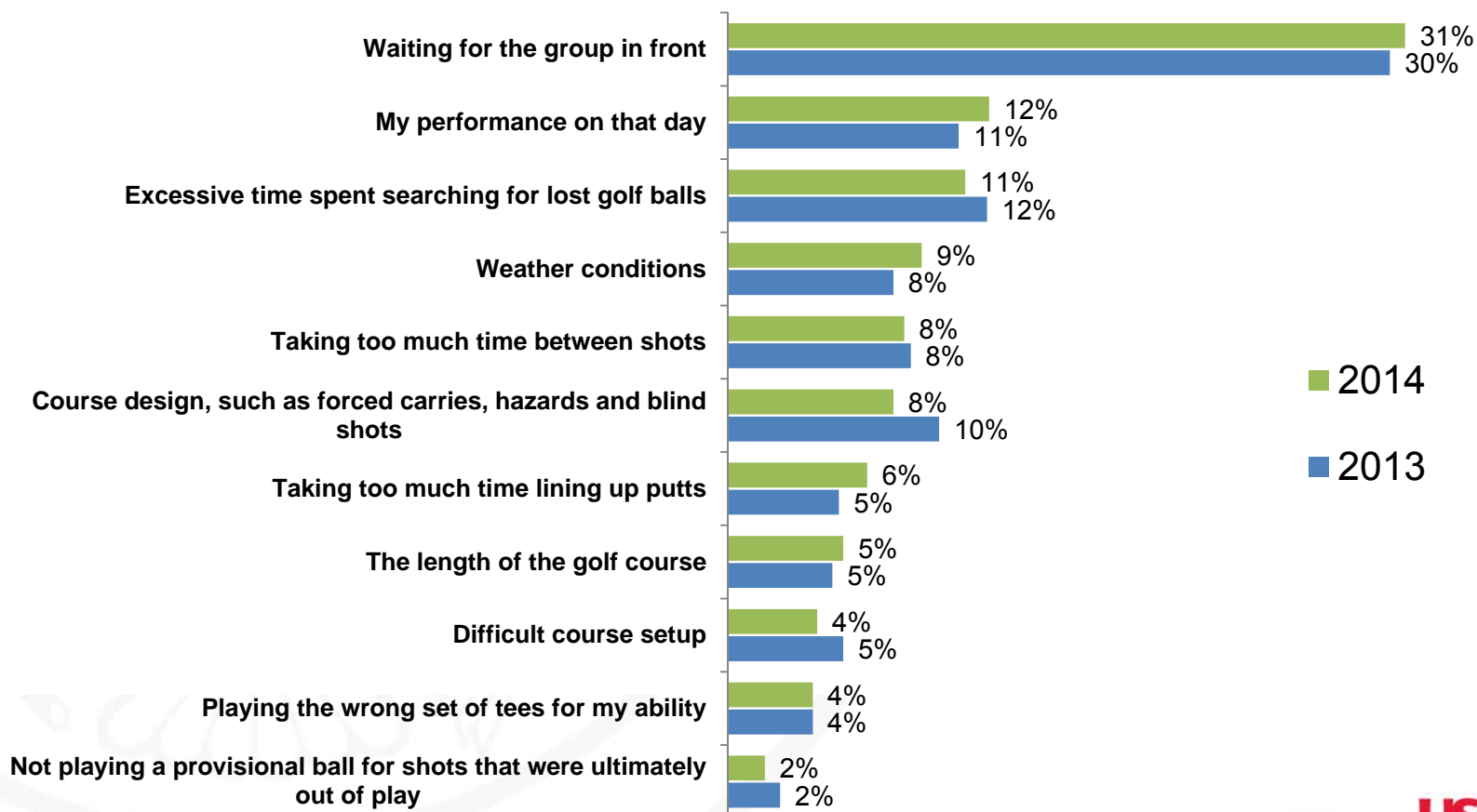
Mean # of Minutes	2014		2013	
	Total Golfers	Total Facility Operators	Total Golfers	Total Facility Operators
Teeing off at the second par-4 or par-5 hole on the course	5.5	2.1	5.3	1.8
Hitting your/their approach into the green at the first par-4 or par-5 hole on the back nine	5.5	2.1	5.3	1.9
Hitting your/their approach into the green at the second par-4 or par-5 hole on the course	5.4	1.9	5.4	1.8
Teeing off on the first par-3 hole on the course	6.1	2.9	5.8	2.9
Teeing off on the 10th hole on the course	6.2	2.9	6.1	2.7
Hitting a shot following a stop by the beverage cart	5.9	1.9	5.6	2.0

Factors Influencing Pace of Play

- Bottlenecks continue to be most frequently cited as having the most significant impact



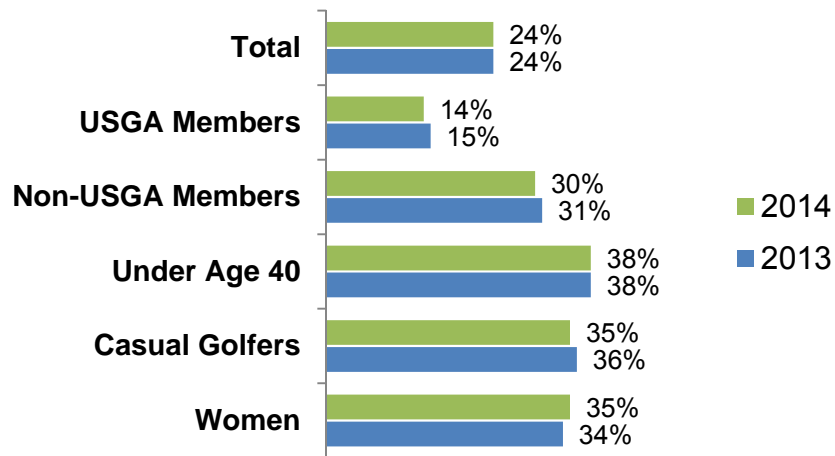
Which of these factors had the greatest impact on your pace of play during your last round?



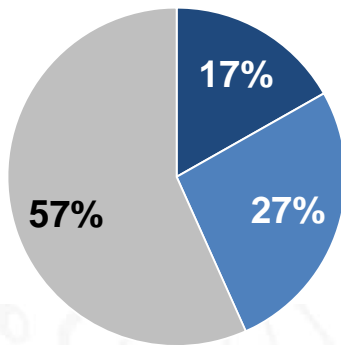
Nine Hole Rounds: Most Pervasive Among "Emerging Golfer segments"



What percentage of your total rounds of golf played in the past 12 months were nine holes in total?



- In 2014, an identical 36% of golfers strongly agreed that they would be just as happy playing nine hole rounds as playing 18 holes.
- The percentage of golfers who indicated that they would play more nine hole rounds if they were more strongly encouraged at the course where they usually played, increased to 27% from 25% a year ago.
- The percentage of Private club golfers who indicated that they would play more nine hole rounds if they were more strongly encouraged at the course where they usually played, increased significantly to 37% from 30% a year ago



- I participated in "Play 9 Day"
- I was aware of "Play 9 Day" but did not participate
- I was not aware of "Play 9 Day" and did not participate

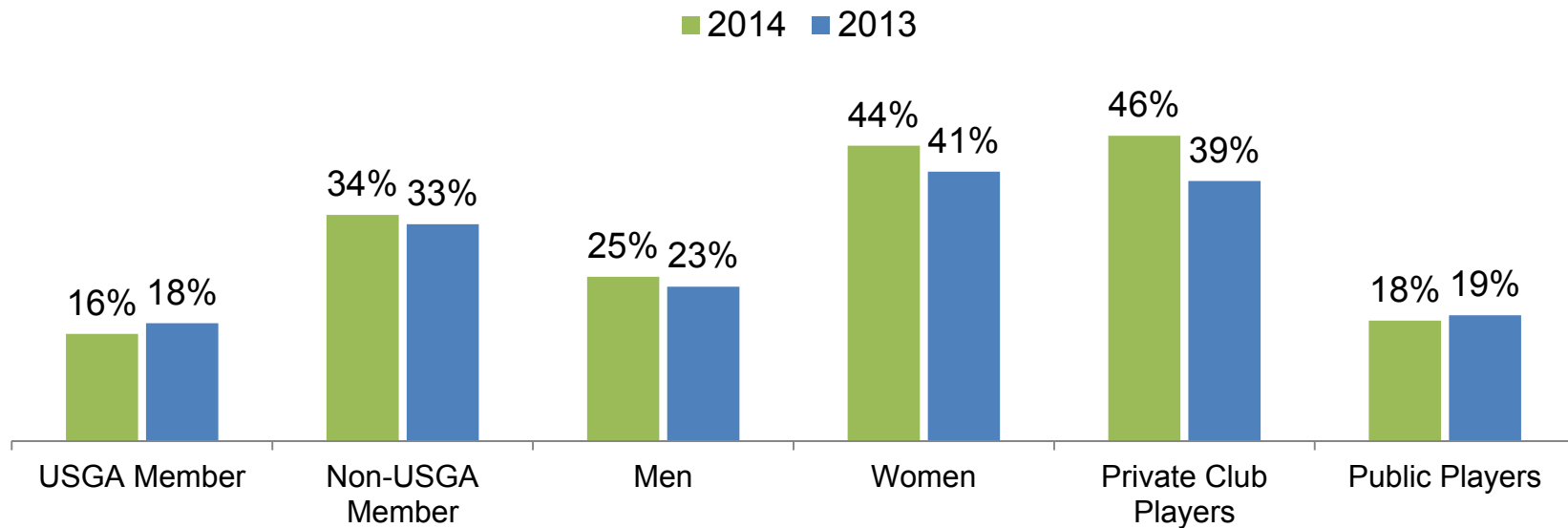
2014
Total Golfers

The Overwhelming Majority of Golfers Have still Not Had Exposure to Formal Pace of Play Initiatives

Q How much do you agree with each of the following statements?

“The golf course that I play most frequently has a formal program in place to promote faster play”

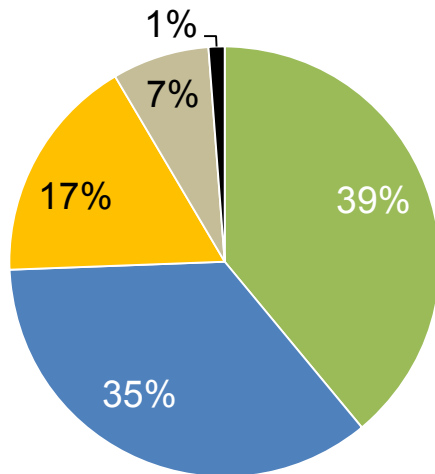
TOP 3 BOX SUMMARY



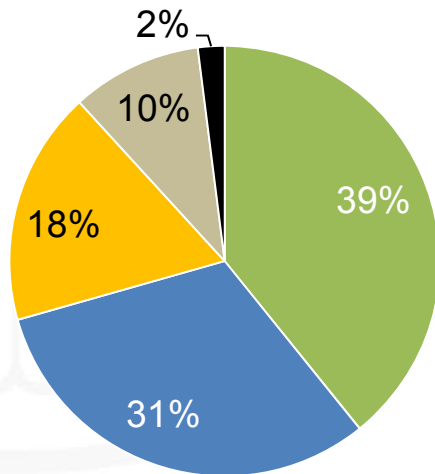
Why Golfers Have Not “Teed It Forward”

- Among those who have not teed it forward, 40% have not done so because they do not believe that doing so will have a meaningful impact on their enjoyment of the game. Additionally, nearly a third feel that teeing it forward will not challenge them as much as they would like during a round of golf.

**2014
Total Golfers**



**2013
Total Golfers**



- I don't believe that "teeing it forward" will have a meaningful impact on my enjoyment of the game
- I want to be challenged as much as possible during a round of golf
- I want to play from the same set of tees as my playing partners and they do not choose to tee it forward
- This is not encouraged at the golf course where I play most often
- I'm not familiar with "Tee it Forward"

Golfer Attitudes About Pace of Play and Awareness of National Initiatives

TOP 3 BOX	Total Golfers		Men		Women	
	2014	2013	2014	2013	2014	2013
It is the responsibility of golfers to monitor the pace of play in their group and encourage others to play faster	73%	72%	74%	73%	72%	70%
From club selection to executing the shot, I typically complete my pre-shot routine in 20 seconds or less	66%	64%	67%	64%	60%	63%
My regular golf group typically uses the "ready golf" principle	64%	59%	64%	59%	64%	61%
At the course I typically play, I usually hit the ball far enough to reach the par-4 and par-5 holes in regulation	57%	58%	58%	60%	50%	51%
I always take a golf cart when one is available	54%	50%	53%	48%	60%	58%
Pace of play exhibited by Tour players has a strong impact on overall pace of play	50%	49%	49%	48%	53%	54%
I'd be supportive of my course implementing a system that gives preferential tee times to those who play faster	49%	49%	46%	47%	61%	57%
I believe that pace of play can be significantly improved at the golf course where I play most frequently	43%	41%	41%	39%	53%	49%
Pace of play has improved over the past 12 months at the facility where I play most often	31%	29%	28%	26%	47%	43%

Golfer Attitudes About Pace of Play and Awareness of National Initiatives

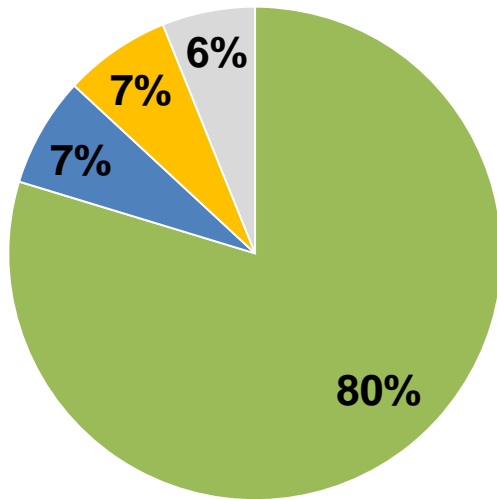
TOP 3 BOX	Avids		Core		Casual	
	2014	2013	2014	2013	2014	2013
It is the responsibility of golfers to monitor the pace of play in their group and encourage others to play faster	84%	82%	70%	69%	54%	57%
From club selection to executing the shot, I typically complete my pre-shot routine in 20 seconds or less.	80%	77%	60%	57%	44%	46%
My regular golf group typically uses the "ready golf" principle	78%	74%	59%	53%	40%	39%
At the course I typically play, I usually hit the ball far enough to reach the par-4 and par-5 holes in regulation	64%	67%	58%	57%	39%	43%
Pace of play exhibited by Tour players has a strong impact on overall pace of play	56%	55%	50%	49%	36%	38%
I always take a golf cart when one is available	54%	48%	57%	53%	50%	51%
I'd be supportive of my course implementing a system that gives preferential tee times to those who play faster	49%	52%	52%	50%	42%	42%
I believe that pace of play can be significantly improved at the golf course where I play most frequently	44%	41%	47%	43%	37%	38%
Pace of play has improved over the past 12 months at the facility where I play most often	25%	22%	41%	36%	30%	35%

Facility Operator Attitudes About Pace of Play vs Golfer Attitudes

TOP 3 BOX	2014		2013	
	Golfers	Facilities	Golfers	Facilities
I understand and can explain Equitable stroke Control	46%	82%	48%	78%
The golf industry has been making a concerted effort to improve pace of play	44%	55%	46%	49%
I believe that pace of play can be significantly improved at the golf course where I play most frequently (at our facility)	43%	12%	41%	18%
The golf staff at the course where I play most frequently (our facility) has promoted (frequently promotes) faster play	40%	53%	39%	54%
I'm (golfers are) just as happy playing nine holes as I (golfers are) am playing 18 holes	37%	20%	36%	16%
I believe that golfers should be assigned a particular tee box by a ranger at the first tee based on their handicap, average score or driving distance.	35%	20%	33%	18%
I believe that slow play is a major problem at the golf course where I play most frequently (our facility)	35%	7%	30%	12%
Pace of play has improved over the past 12 months at the facility where I play most often (at our facility)	31%	19%	29%	23%

Both Golfers and Facility Operators Agree: The Onus is on Golfers to Take Responsibility for Improving Pace of Play

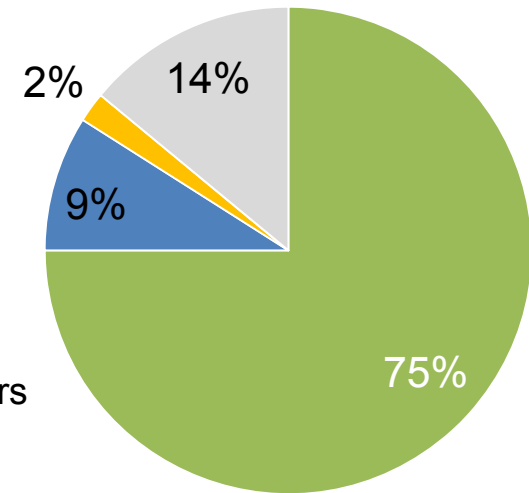
MOST RESPONSIBLE SUMMARY



Total Golfers

2013 "Golfers"
77%

- Golfers
- Starters/rangers
- Course superintendent
- Pro shop staff/facility managers



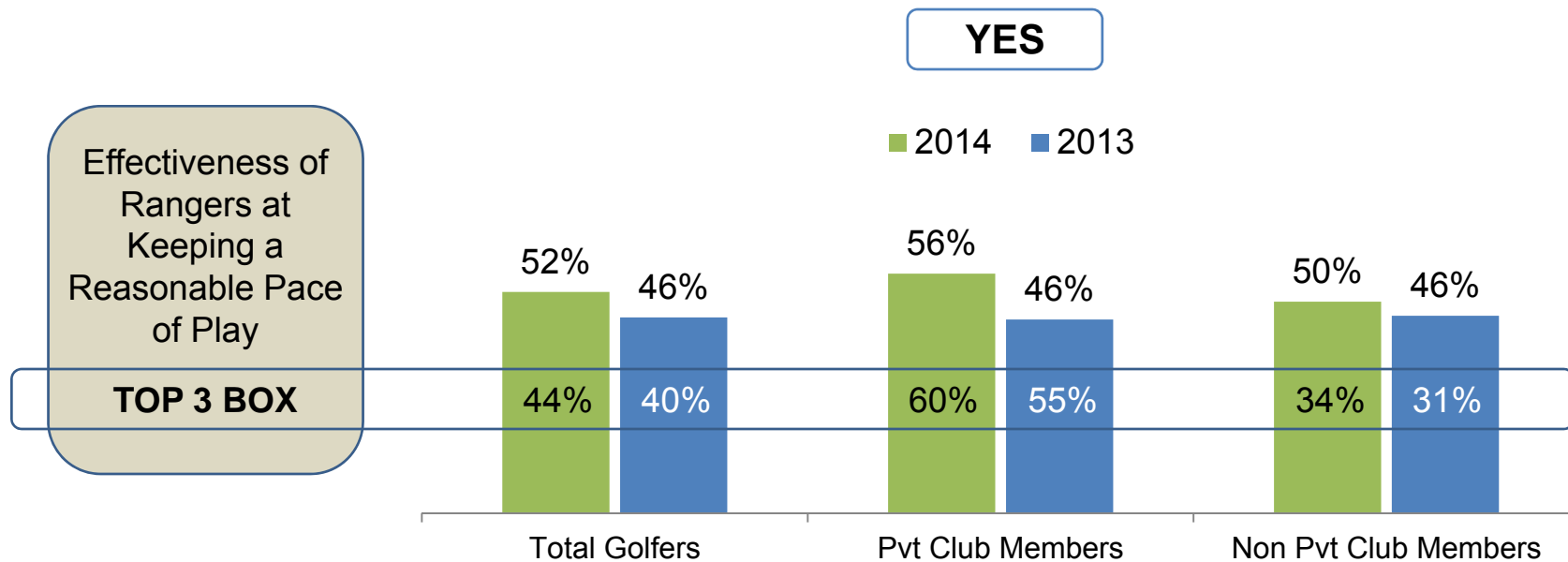
Total Facilities

2013 "Golfers"
74%

Presence and Effectiveness of Rangers in Maintaining a Reasonable Pace of Play

- More than half of golfers now play at facilities with rangers, but less than half of them are very effective at maintaining a reasonable pace of play

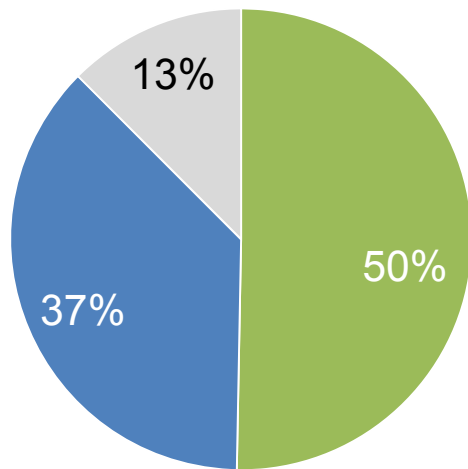
Q Are there rangers in place to monitor pace of play at the course where you played the most number of rounds during the past 12 months?



Less than Half of Rangers Remain Knowledgeable about Pace of Play

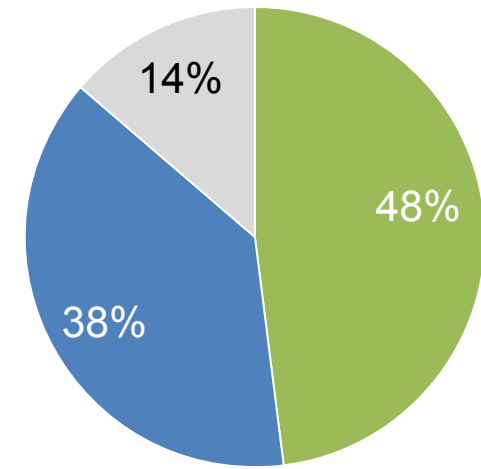
Q Which of the following best describes the rangers at the course where you've played most often during the past 12 months?

Total Golfers



2014

- They are extremely knowledgeable about pace of play and help speed up the typical round
- They are not particularly knowledgeable about pace of play, but they try to speed up a typical round
- They have no impact on pace of play whatsoever



2013

Facility Owners Perspectives on Major Drivers of Facility Sustainability

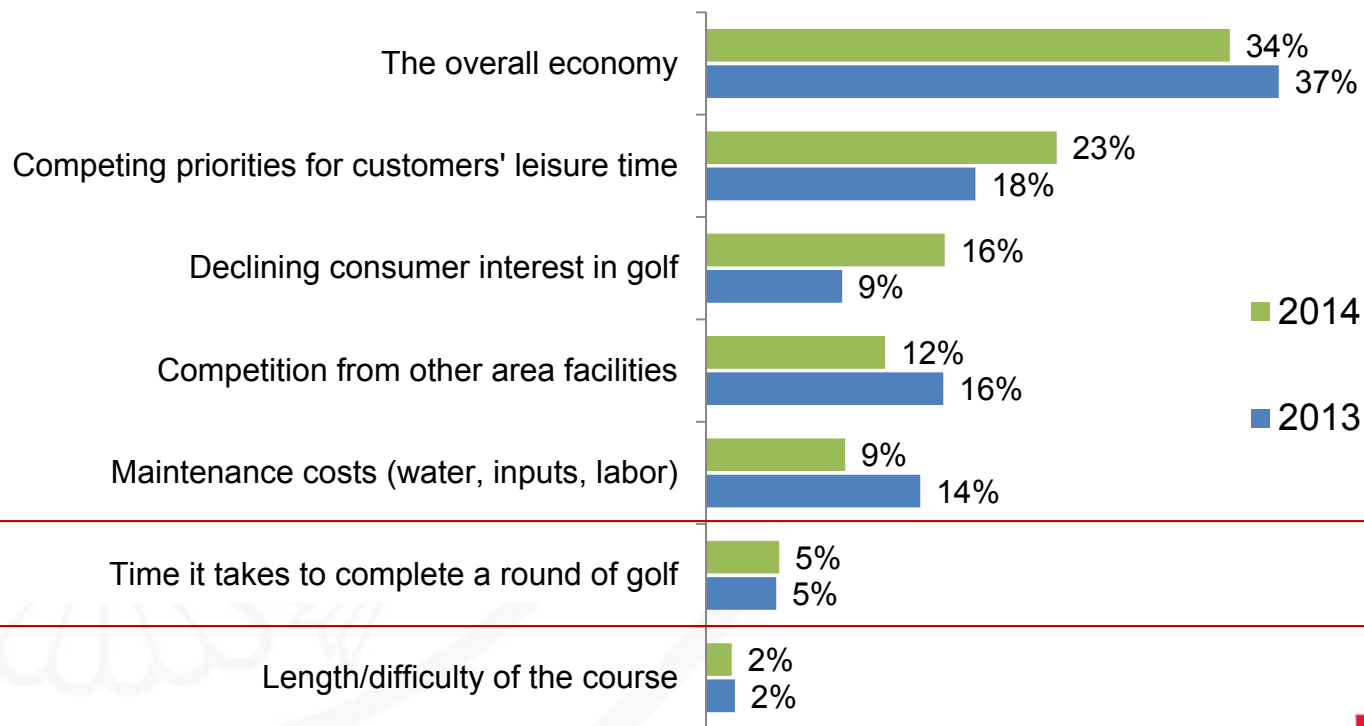
- Pace of Play Continues to pale behind other factors, with perceived declining consumer interest in golf, showing year over year growth



Ranking of issues that can impact the sustainability and financial health of your golf facility

RANKED #1 SUMMARY

**Total
Facilities**



Facility Characteristics Impacting Pace of Play

Q Facilities: Which of the following are characteristics of your golf facility?

	Private		Municipal	
	2014	2013	2014	2013
We allow golf carts to be driven off cart paths	96%	95%	96%	99%
We allow golfers to play from different sets of tees because of handicap or age in net competitions	91%	84%	91%	86%
We alter course setup (tee placement, rough height, green speed, hole location, etc.) to speed up play during periods of peak activity	52%	43%	45%	49%
We deploy one or more beverage carts throughout the facility	36%	40%	62%	61%
We have established guidelines for a maximum duration for a round (guidelines for the length of time that a round should not exceed)	50%	63%	43%	51%
We communicate the expected time that a round should not exceed to each player prior to their teeing off	43%	50%	43%	41%
We employ paid starters	32%	33%	49%	52%
We have specific programs for nine-hole play	38%	46%	43%	32%
We employ paid course rangers	27%	27%	42%	48%

Facility Characteristics Impacting Pace of Play

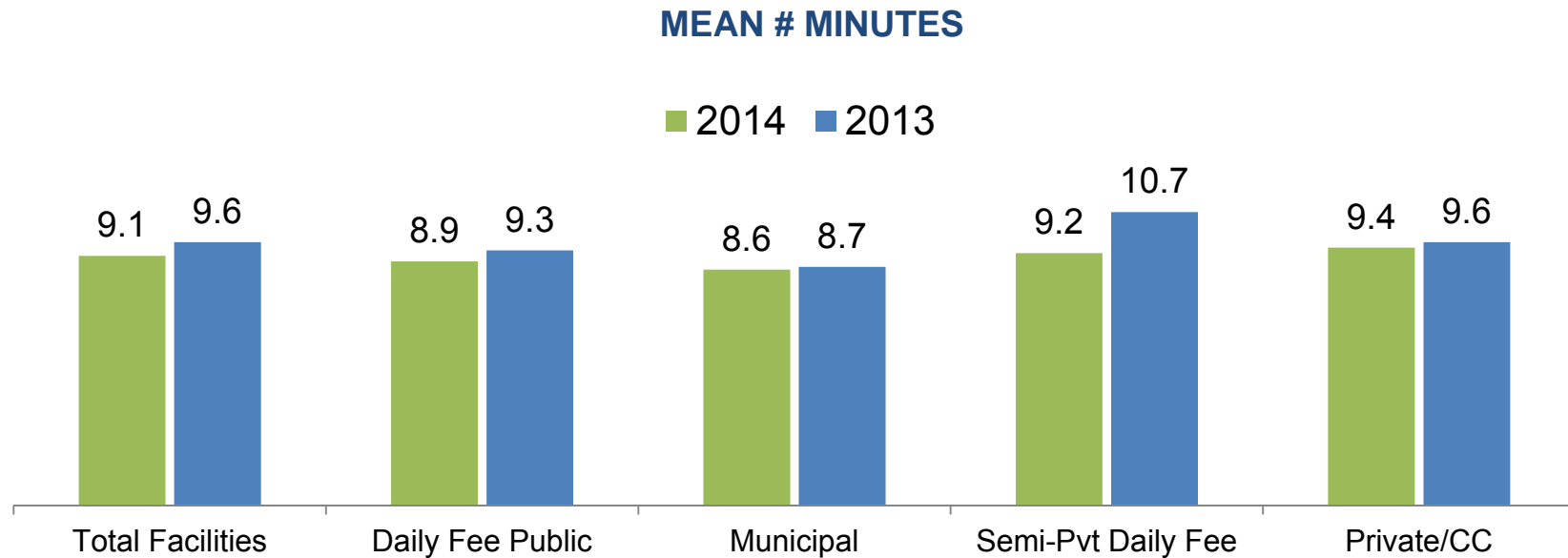
Q Facilities: Which of the following are characteristics of your golf facility?

(continued)	Private		Municipal	
	2014	2013	2014	2013
We have specific signage communicating awareness of pace of play	25%	27%	45%	35%
We have a formal program in place at our facility to promote faster play	25%	31%	19%	21%
We increase the intervals between tee times to improve pace of play during peak periods of play	24%	22%	21%	25%
We employ volunteer course rangers	4%	3%	32%	28%
We employ volunteer starters	1%	1%	17%	17%
We have GPS devices installed on our golf carts	2%	1%	11%	13%
We require golf carts for all play	7%	6%	-	5%
We set aside tee times for two-ball play (such as match play or alternate shot formats)	7%	7%	2%	7%

Tee Time Intervals

- The average facility continues to report scheduling around a nine minute interval between assigned tee times

Q Facilities: How many minutes do you schedule between tee times?



The Plurality of Golf Facilities Still Have Not Conducted Golfer Education Programs

Q Facilities: To the best of your knowledge, which of the following statements is most applicable to your golf facility?

