

Global View of Pace of Play

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Talk structure

- Pace of Play outside USA
- Review of Global Survey
- “Time for Golf” Conference
- R&A initiatives



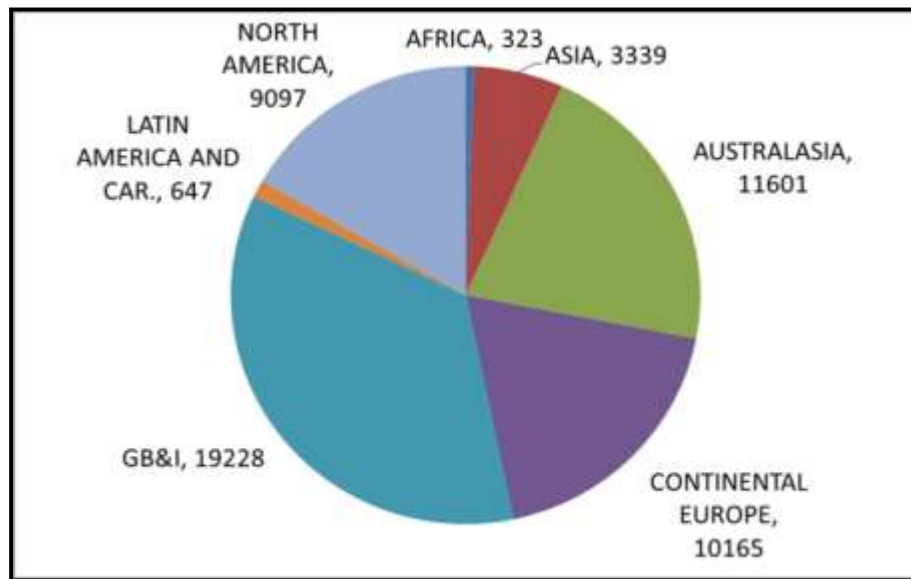
Global Survey

- To find out what golfers think
- Conducted from September 2014 to March 2015
- Forms of Play, Groups, Time, Satisfaction
- Translated into Japanese, Chinese, French, German, Spanish
- 56,248 responses from 127 countries



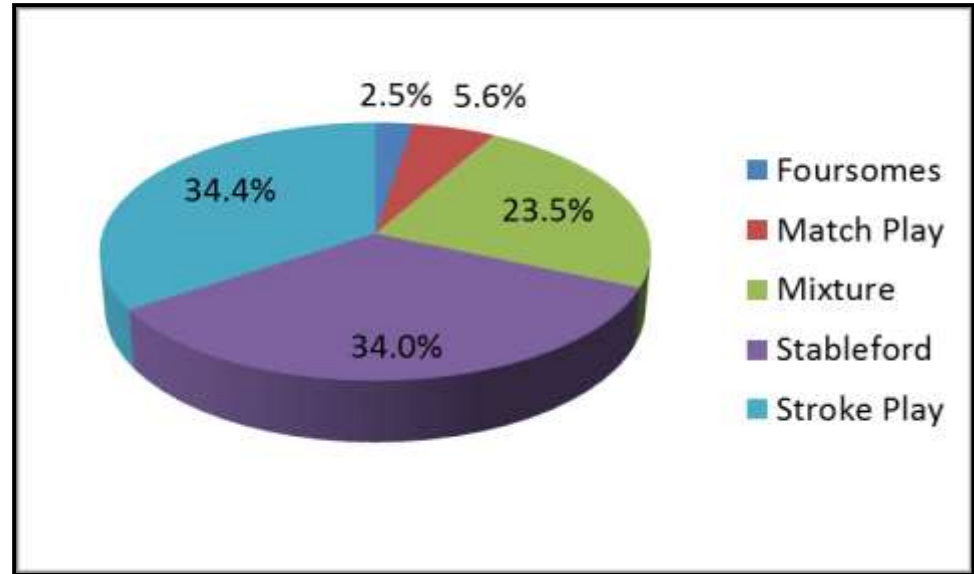
Demographics

- 17.5% female - 82.5% male
- Strong global participation
- Large Australasian and GB&I response
- USA respondents
- Core golfers
- Aged 45-74
- Averaging 2 rounds per week



Forms of play

- Significant cultural differences
- Stableford most common in:
 - Africa (47%)
 - Australia (63%)
 - GB&I (36%)
- Stroke play most common in:
 - Asia (81%)
 - Continental Europe (37%)
 - Latin America (62%)
 - North America (75%)
- GB&I showed greatest mixture



Number of players

	Mean	Median	Mode
AFRICA	3.8	4	4
ASIA	3.8	4	4
AUSTRALASIA	3.9	4	4
CONTINENTAL EUROPE	3.2	3	3
GB&I	3.4	4	4
LATIN AMERICA AND CAR.	3.7	4	4
NORTH AMERICA	3.7	4	4

The majority of respondents
play in four balls

Exception: Continental Europe

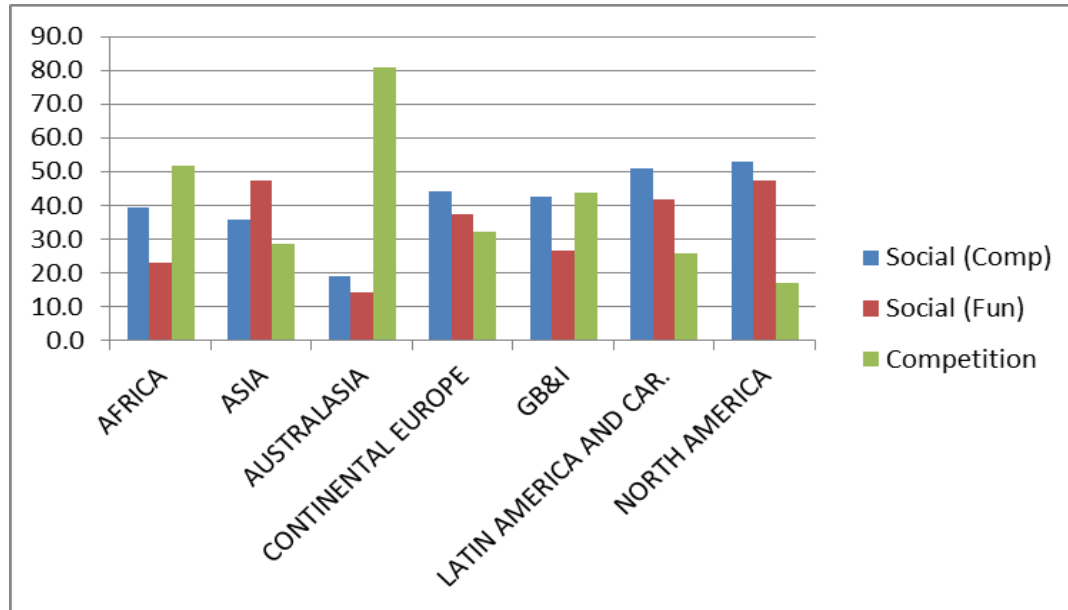
Mean = add them all up and divide by the number of responses

Median = the middle response

Mode = the most frequent response



Types of play - regions



Prominence of competitive golf in Australasia

Certain regions playing more golf under competition conditions – impact on time taken?

How many holes?

- More than 90% preferred to play 18 holes in all but one region
- Continental Europe 15% preferred to play 9
- USA response was 8% - much higher than GB&I and Canada

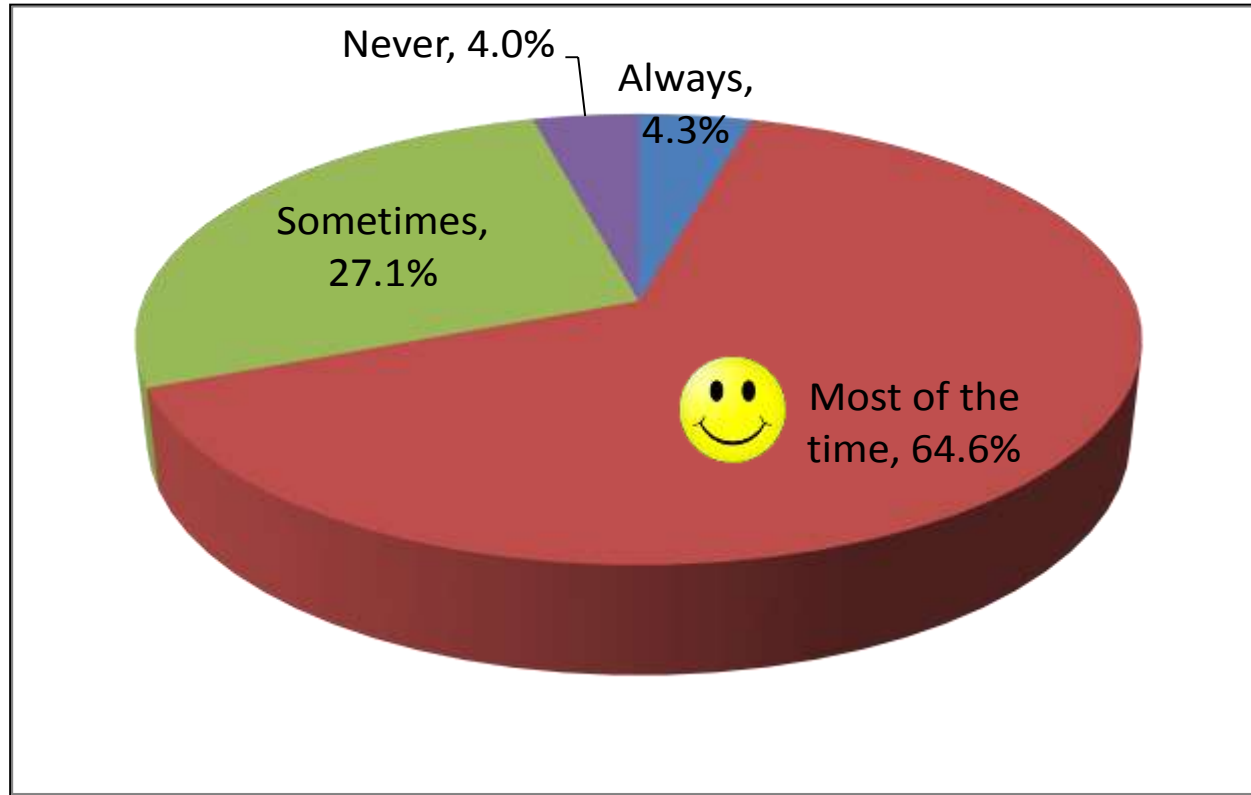


Time taken to play 18 holes





	Mean time
AFRICA	4:08
ASIA	4:05
AUSTRALASIA	4:09
CONTINENTAL EUROPE	3:54
GB&I	3:44
LATIN AMERICA AND CAR.	4:09
NORTH AMERICA	3:59
All	3:56

- Mainly groups of 4
- Competitions
- Self-determined
- 25 minute range
- Aus v GB&I comparison

Are you generally happy with the time it takes to play?



Happiness in relation to round times

Time	Always 	Most of the time 	Sometimes 	Never 
2.0-2.5 hours	17.3%	55.6%	23.3%	3.9%
2.5-3.0 hours	9.7%	65.3%	21.7%	3.2%
3.0-3.5 hours	5.5%	73.1%	19.9%	1.5%
3.5-4.0 hours	4.3%	72.1%	21.6%	2.0%
4.0-4.5 hours	3.7%	62.1%	29.9%	4.3%
4.5-5.0 hours	2.9%	34.8%	49.4%	12.9%
5.0-5.5 hours	2.8%	22.9%	47.3%	27.0%
More than 5.5 hours	5.0%	26.7%	33.3%	35.0%

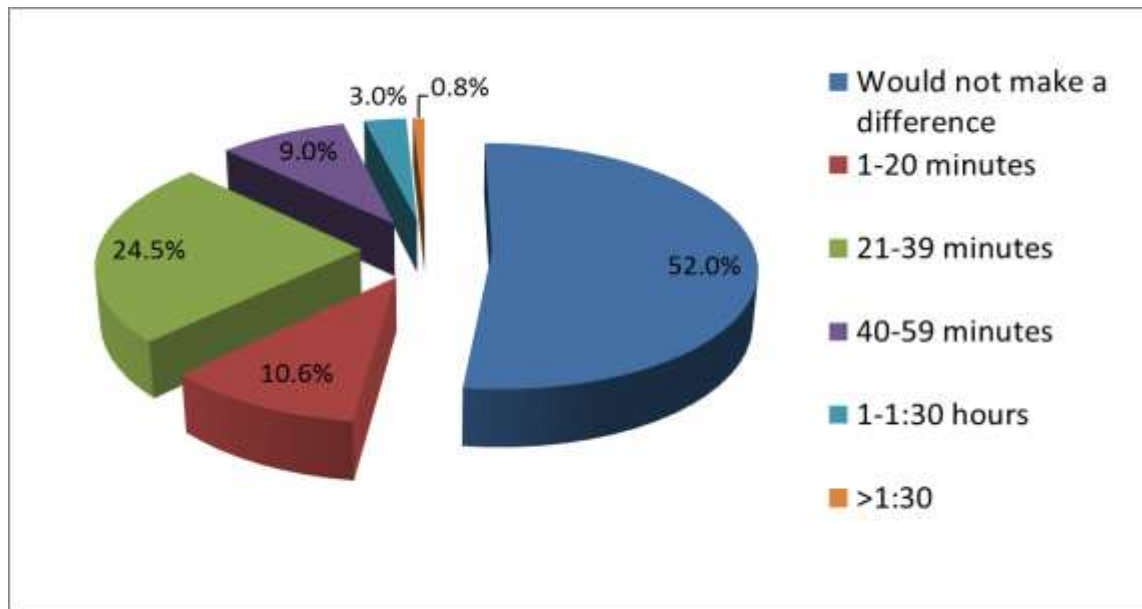
- Dissatisfaction increases significantly over 4½ hours
- Findings have caused some concern
- Global variances – can't apply one standard

Playing in less time and enjoyment

- 60% said playing in less time would increase enjoyment
- Note that is 60% of core golfers
- Other 40% did not say they would enjoy the game less if they played in less time



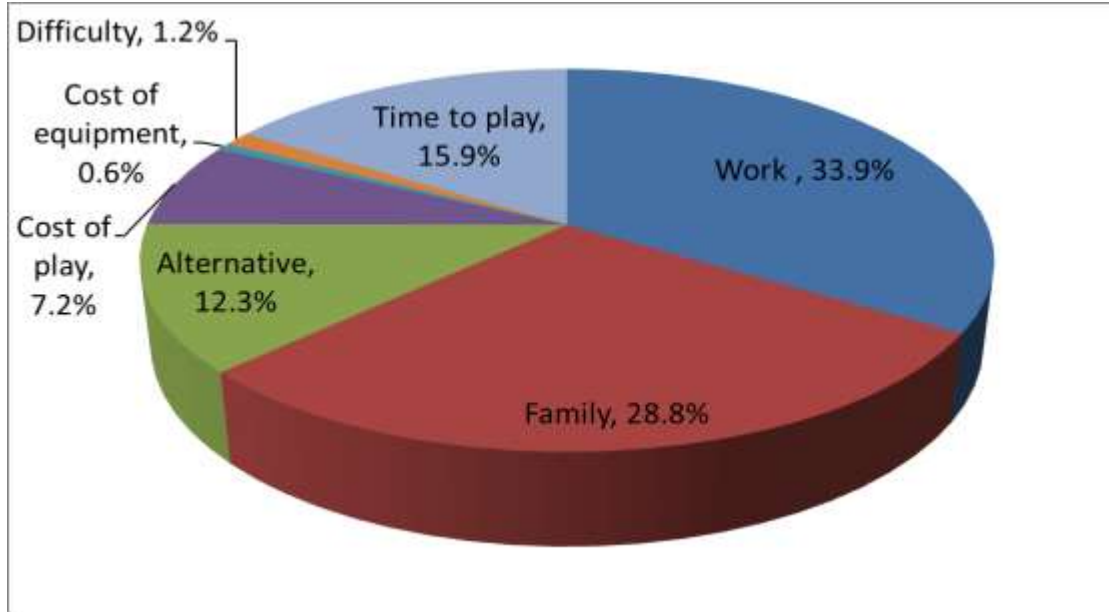
Would playing in less time increase your frequency of play?



- Link to participation
- 52% no difference
- 21-39 minutes reduction
- But already avid golfers
- Note 25-44 years response

A much larger proportion of golfers aged between 25-44 expressed a desire to play in 1:00-1:30 hours less time – market for shorter forms

Factors preventing golfers playing more golf



- Time to play only 16%
- Family and work more significant
- 21-39 minutes reduction
- But already avid golfers
- Note Syngenta UK study

Syngenta study, which included lapsed golfers, had 31% figure for time to play

Respondent Opinion on Factors Impacting Pace of Play

1	Poor etiquette	Player
2	Player pre-shot routines	Player
3	Bad play	Player
4	Players mimicking Championship Golf	Player
5	Players thinking they can reach the green	Player
6	Players marking their card when it is their turn to play	Player
7	Lack of knowledge of the Rules	Player
8	Congested Course	Management
9	Length of rough	Course
10	Unnecessary marking and lifting on the putting green	Player

- Top 7 all player related
- Misunderstanding
- Note USA responses had courses that are too difficult much higher in chart

Major Takeaways from the Survey

1. Interest
2. Regional variations in forms, nature and time
3. Majority happy most of time
4. Majority would enjoy more if took less time
5. Customer satisfaction can be improved
6. Market for shorter forms



What now for The R&A and Pace of Play?

1. Time for Golf Conference

- November 2015
- Wide-ranging participation
- Focus on 3 principal issues
- Much good thought but lacking co-ordination
- Misconceptions on causes
- Emphasised need for information and education



2. The Manual

- Offer a single source suite of solutions
- Select solutions to best tackle problems
- Emphasis on management and golf course issues
- Simple and easy read
- Book form and web based



3. Engagement with the Tours

- Official and player attendance at conference
- Shop window
- Explained measures being taken
- Strengthening of policies
- R&A to follow
- Much greater collaboration going forward



Engagement with Tours

“Stephen Gallacher wants golf chiefs to call time on slow-play cheating”



4. Endorsement of Shorter Forms of Golf

- Golf in significantly less time is needed
- Not variations on golf
- International Pitch & Putt
- 9 Hole Competitions



Conclusion

- Huge increase in focus
- Co-ordinated effort with our affiliates and stakeholders
- Offer solutions for lasting improvements



2016 USGA Pace and Innovation Symposium

