



Golfer Satisfaction and Retention Implications from Score Posting Data

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Agenda

- I. How the USGA is impacting the future of golf courses
- II. Golfer Retention – a critical industry priority
- III. Examining score posting data
- IV. Results and implications
- v. Questions

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 complex sand trap with several interconnected holes and a narrow channel. The surrounding areas are covered in grass, some appearing brownish and others greener. The lighting is bright, creating strong shadows and highlights on the terrain.

How the USGA is impacting the future of golf courses

OUR VISION:

A thriving, welcoming
and sustainable game



USGA stands for:

Unify



Govern

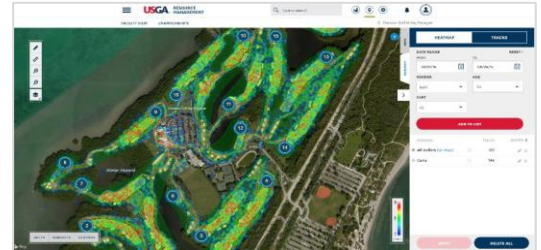


Our purpose is to **U**nify the golf community, to **S**howcase the golfers who inspire us, to **G**overn the sport to ensure a solid foundation and to **A**dvance the good of the game, for the next 100 years and beyond.

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



An aerial photograph of a golf course. The image shows a large, vibrant green putting green on the right side, surrounded by several sand traps (bunkers) with light-colored sand. The surrounding fairway and rough areas are a mix of green and brownish-yellow grass. The text "Golfer Retention – a Critical Industry Priority" is overlaid in white, bold, sans-serif font on the left side of the image.

Golfer Retention – a Critical Industry Priority

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.



An aerial photograph of a golf course. The image shows a large, vibrant green fairway on the right side, which is partially obscured by a semi-transparent dark green circle. To the left of the fairway is a sand trap with a light tan, textured surface. The background consists of a mix of green grass and brownish-yellow areas, possibly representing rough or other parts of the course. The overall lighting is bright, suggesting a sunny day.

While COVID has provided the industry a strong opportunity, we must strive to improve the golfer experience for the health of the game for future generations

The Opportunity

By monitoring and improving golfer satisfaction, we believe that the industry can build on 2022/2021 and continue to:

- Grow demand
- Increase revenue
- Improve profitability

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

An aerial photograph of a golf course. A large, vibrant green fairway or green is on the right side, surrounded by a darker green border. To the left of this green is a complex sand trap with several interconnected holes and a narrow channel. The surrounding area is covered in brownish-green grass. The text 'Examining Score Posting Data' is overlaid in white, bold font across the center of the image.

Examining Score Posting Data



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%)**



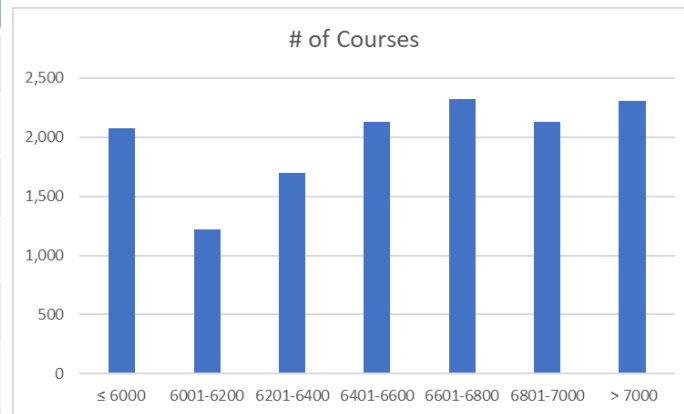
Course Length Characterization

“Supply - Courses”

Distribution of Courses by Overall Length

When using overall length to characterize golf courses, there is a generally even distribution across 200-yard bins

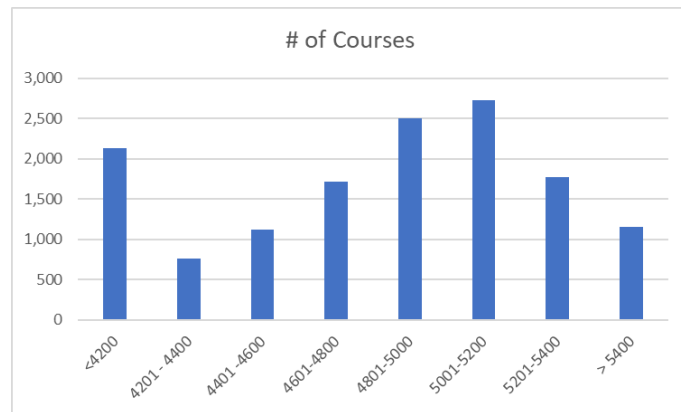
Overall Course Length (yds)	# of Courses	% of Courses
≤ 6000	2,075	15%
6001 - 6200	1,222	9%
6201 - 6400	1,697	12%
6401 - 6600	2,127	15%
6601 - 6800	2,319	17%
6801 - 7000	2,130	15%
> 7000	2,307	17%
Total	13,877	100%



Distribution of Courses by Front Tee Length

Using the forward tee length, the course inventory distribution peaks about 5000 yards

Front Tee Course Length (yds)	# of Courses	% of Courses
≤ 4200	2,126	15%
4201 - 4400	757	5%
4401 - 4600	1,126	8%
4601 - 4800	1,717	12%
4801 - 5000	2,503	18%
5001 - 5200	2,727	20%
5201 - 5400	1,768	13%
> 5400	1,153	8%
Total	13,877	100%



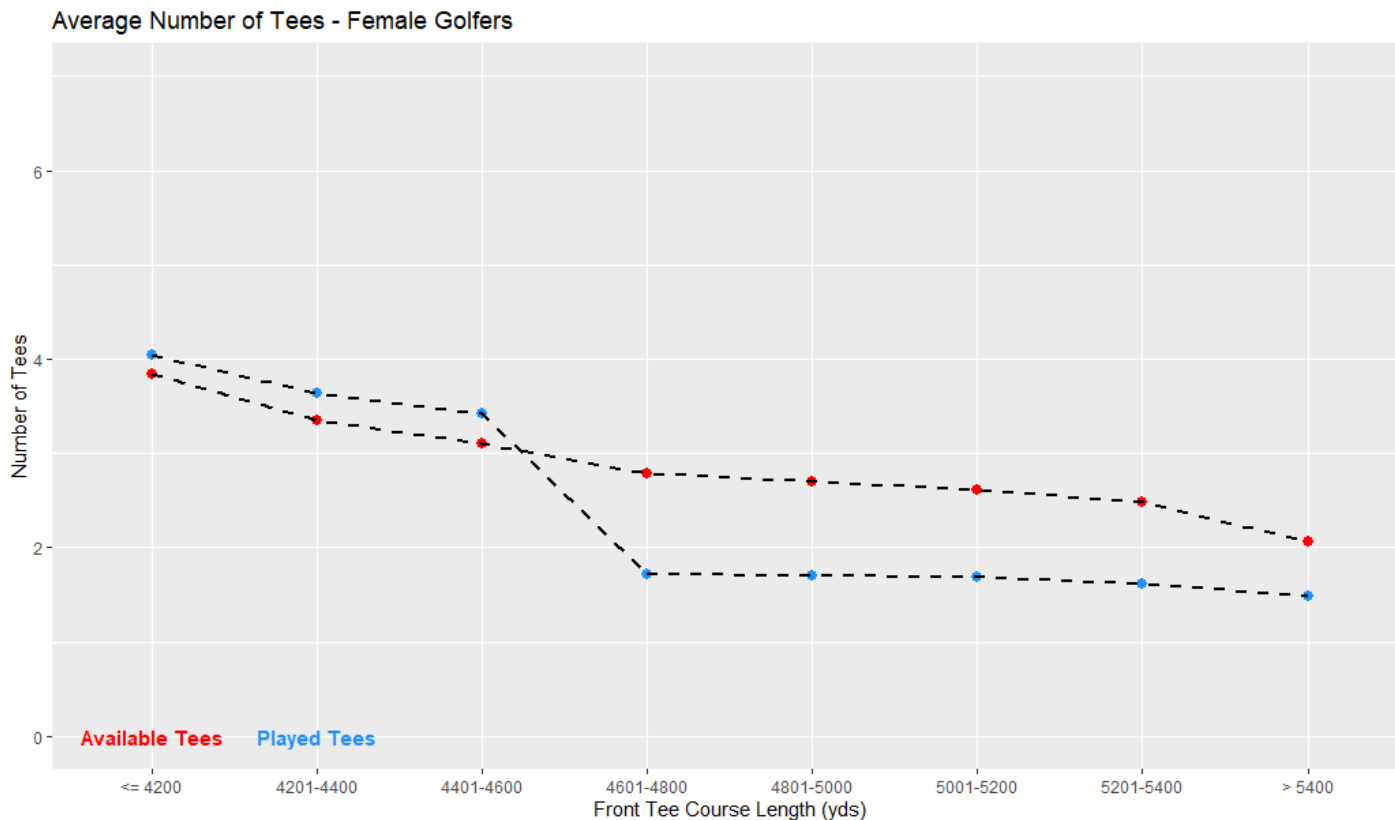
An aerial photograph of a golf course featuring a large, irregularly shaped water hazard in the center. The surrounding terrain is a mix of green grass and brownish-yellow earth, with several smaller water features and sand traps scattered throughout. The text "Tee Availability for Golfers to Use" is overlaid in a large, black, sans-serif font across the upper middle portion of the image.

Tee Availability for Golfers to Use

“Supply - Tees”

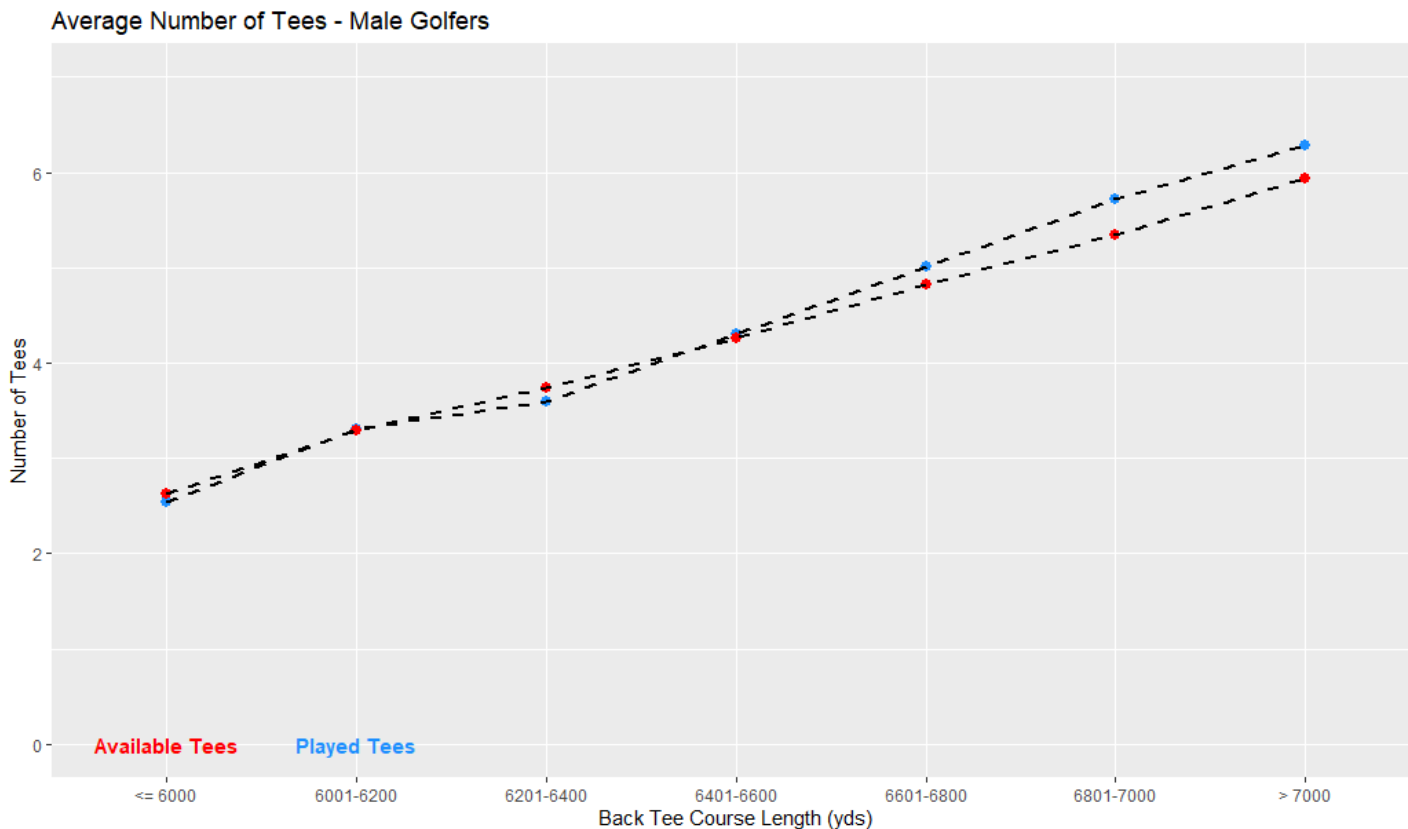
Number of Rated Tees Available - Female

As forward tee length decreases, the average number of rated tees for females nearly doubles. Tee utilization drops above 4600 yards



Number of Rated Tees Available - Male

As overall course length increases, the average number of rated tees for males increases and almost all tees are utilized





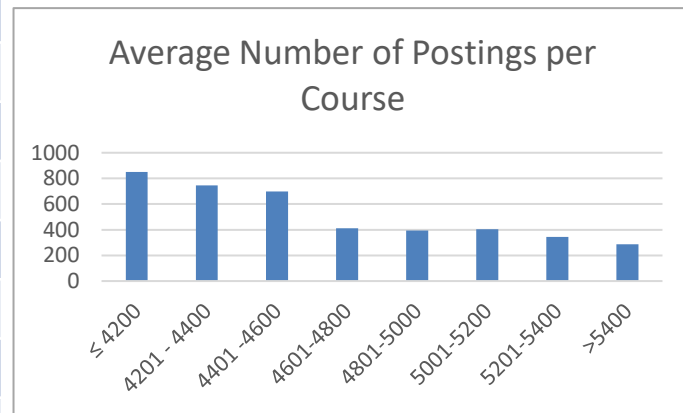
Course Utilization by Golfers Utilizing Handicap Service

“Demand - Courses”

Female Scores Posted by Front Tee Length

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

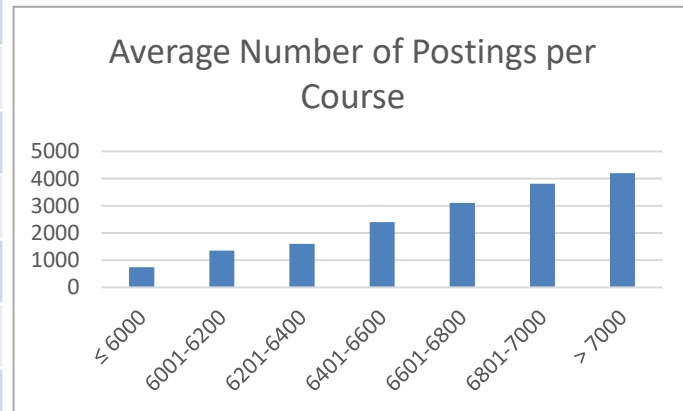
Front Tee Course Length (yds)	Scores Posted	Postings / Course
≤ 4200	1,799,884	850
4201 - 4400	587,395	746
4401 -4600	791,312	699
4601-4800	676,323	412
4801-5000	987,697	394
5001-5200	1,134,335	405
5201-5400	670,126	345
>5400	419,783	286
Total	7,066,855	Avg = 517



Male Scores Posted by Overall Course Length

As overall course length increases, the average number of postings by male golfers increases

Overall Course Length (yds)	Scores Posted	Postings / Course
≤ 6000	1,779,759	744
6001-6200	1,991,573	1,352
6201-6400	3,325,687	1,597
6401-6600	6,446,011	2,404
6601-6800	8,884,465	3,102
6801-7000	9,850,648	3,817
> 7000	14,320,464	4,195
Total	46,598,617	Avg = 2,459





Golfer Posting Frequency & Course Selection Behaviors

Postings by Handicap Index Bin & Gender

Handicap Index Bin	# Male Golfers	# Male Scores Posted	# Scores per Male Golfer	# Female Golfers	# Female Scores Posted	# Scores per Female Golfer
< 0	24,097	767,500	31.85	1,515	22,787	15.04
0.0 – 5.0	116,620	4,461,904	38.26	3,507	86,048	24.54
5.1 – 10.0	286,223	11,240,548	39.27	7,795	312,988	40.15
10.1 – 15.0	366,087	12,877,221	35.18	18,488	842,165	45.55
15.1 – 20.0	281,914	8,559,100	30.36	37,454	1,557,252	42.58
20.1 – 25.0	142,975	3,719,132	26.01	54,086	1,854,293	34.28
25.1 – 30.0	59,277	1,289,243	21.75	58,406	1,538,983	26.35
30.1 – 35.0	20,276	365,354	18.02	42,638	842,639	19.76
> 35.1	8,950	117,590	13.14	42,203	521,718	12.36
Totals	1,306,419	43,397,592	33.22	220,956	5,842,170	28.48

- Male golfers with Handicap Indexes between 0.0 – 10.0 post more frequently
- Female golfers with Handicap Indexes between 10.1 – 20.0 post *most* frequently
- Higher Handicap Index golfers post fewer scores!
- There are a lot of female golfers in higher Handicap Index bins.

Scores Posted by Forward Tee Length Bin

Forward Tee Length	Male Scores Posted	Female Scores Posted	Ratio of Male to Female
<4200	8,337,218	1,858,525	4.49
4201 - 4400	2,814,662	593,730	4.74
4401 -4600	3,668,363	790,953	4.64
4601-4800	4,853,037	860,026	5.64
4801-5000	7,727,261	1,208,332	6.39
5001-5200	9,266,623	1,337,988	6.93
5201-5400	6,188,915	787,726	7.86
>5400	3,487,572	407,459	8.56

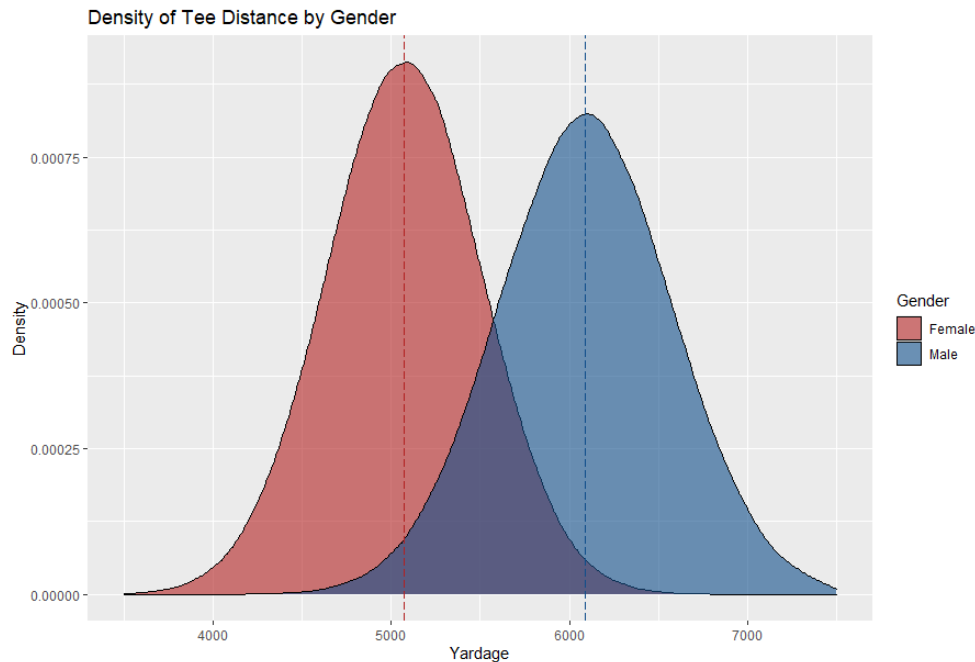
The ratio of men/women decreases as playing options for courses get shorter (women post at an increasingly higher frequency relative to men)

An aerial photograph of a golf course. The foreground is dominated by a large, irregularly shaped body of water, possibly a lake or a large pond, with several small islands or peninsulas. The water is a dark, muted green. Surrounding the water are various green spaces, including what appear to be fairways, roughs, and possibly a green. The terrain is uneven, with rolling hills and valleys. The lighting suggests a bright day, with some shadows cast across the landscape. The overall color palette is dominated by greens and blues, with some brownish tones in the rough areas.

Tee Utilization by Golfers

“Demand - Tees”

Playing Length by Gender (normalized)



Males play tees ~1000 yards longer on average than females

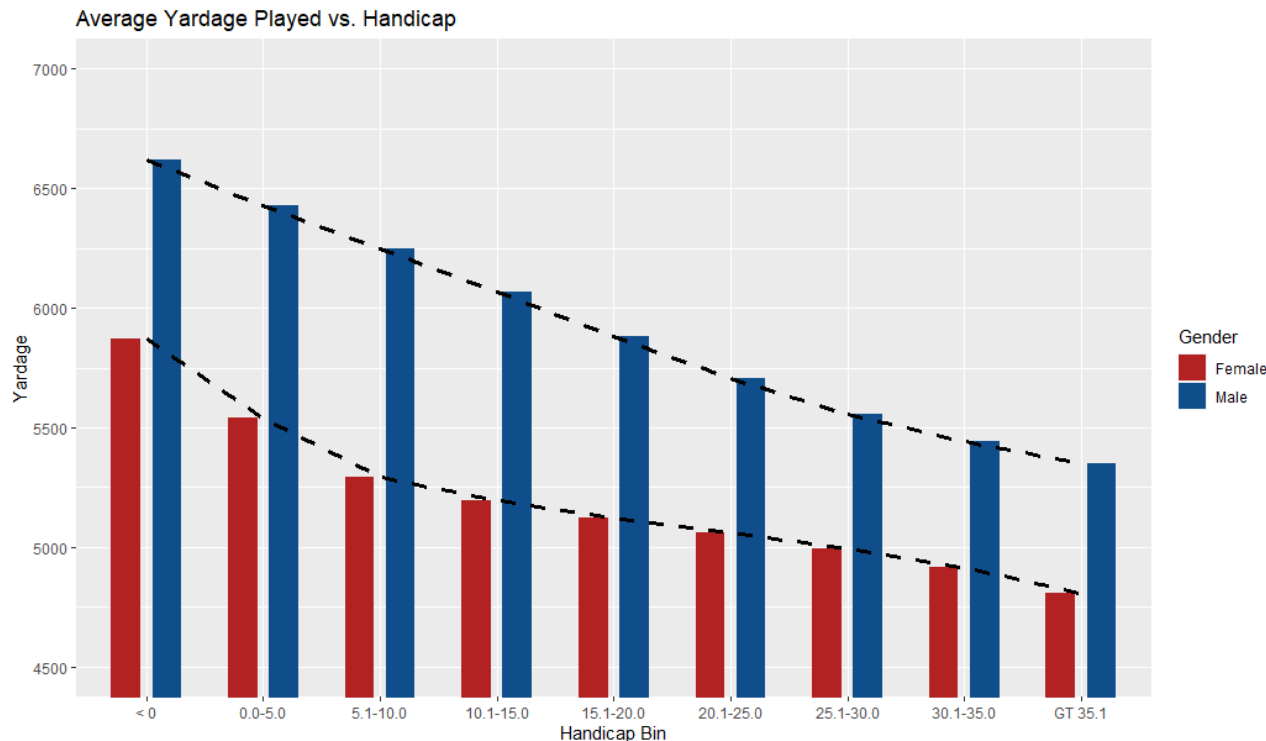
Dotted lines indicate the Mean

The male distribution is wider, and the peak is shorter indicating that males use a larger range of playing distances

Also shown by greater Std. Dev.

<u>Gender</u>	<u>Mean</u>	<u>Std. Dev.</u>
Female	5071	435
Male	6089	488

Average Playing Length by Handicap Index

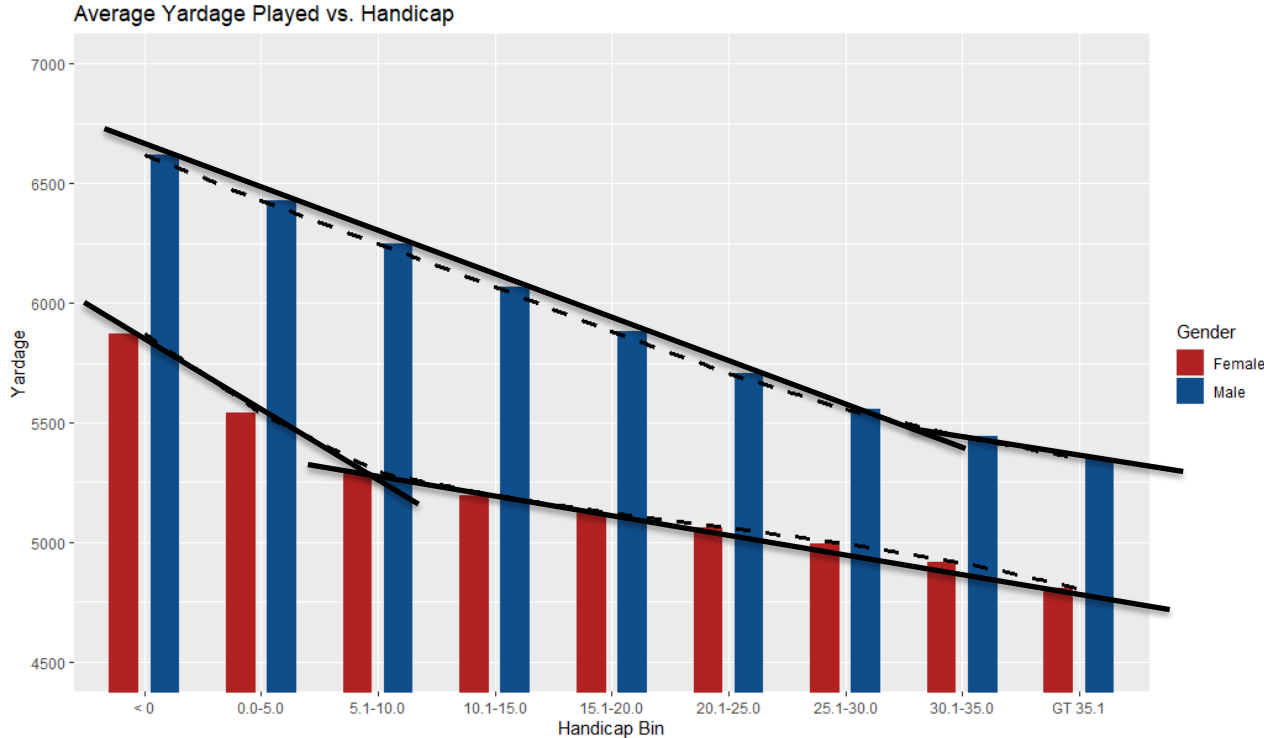


Better golfers play longer tees for both genders

Male slope = -163 yds/H.I. bin

Female slope = -115 yds/H.I. bin

Average Playing Length by Handicap Index



Break in the curve?

- Male data doesn't start to flatten out until handicaps >30 (less yardage conceded as skill decreases)
- Slope for women is initially greater and flattens out above handicaps >10
- First indication of available course lengths not matching the capability of females.

Two Ways to Look at Golfer Tee Selection

Because from course to course there are not equal numbers of rated tees for men and women, the analysis is not straightforward

Option 1: When there are three or more rated tees, the shortest rated tee is the front tee, the longest rated tee is the back tee and the other(s) are middle tees, regardless if there is only one, or if there are several, middle tees

Option 2:

For women: Start with the front tee and count back with the third and all longer tees group as “other”

For men: Start with the back tee and count forward

Middle Tees Grouped

Option 1: If there are three or more rated tees, the shortest rated tee is the front tee, the longest rated tee is the back tee and the other(s) are middle tees, whether there is only one or if there are several middle tees.

Middle Tees Grouped - Overall Utilization

Gender	Front Tee Usage	Middle Tee Usage	Back Tee Usage
Male	5%	85%	10%
Female	48%	47%	5%

- **85% of male golfers have tee selection flexibility – there is an available tee in front and behind the tee they elected to use**
- **47% of female golfers have tee selection flexibility – there is an available tee in front and behind the tee they elected to use**

Breakdown of Female Tee Utilization

Front Tee Course Length	Front Tee Usage	All Middle Tees Usage	Back Tee Usage
<4200	12%	86%	3%
4201 - 4400	23%	74%	3%
4401 - 4600	37%	58%	5%
4601-4800	50%	45%	5%
4801-5000	61%	33%	5%
5001-5200	70%	24%	6%
5201-5400	75%	19%	7%
> 5400	84%	8%	8%

- **As front tees get shorter, more female golfers have flexibility to play from desired distance.**
- **86% of female golfers have flexibility – there is an available tee in front and behind the tee they elected to use when the front tee is less than 4200 yards.**
- **8% of female golfers have flexibility – there is an available tee in front and behind the tee they elected to use when the front tee is greater than 5400 yards.**

Breakdown of Male Tee Utilization

Overall Course Length (yds)	Front Tee Usage	All Middle Tees Usage	Back Tee Usage
≤ 6000	12%	43%	45%
6001-6200	8%	62%	30%
6201-6400	7%	68%	25%
6401-6600	5%	80%	14%
6601-6800	5%	87%	8%
6801-7000	4%	91%	5%
> 7000	3%	94%	3%

- **As courses get longer, more male golfers have flexibility to play from the distance they desire.**
- **91% of male golfers have flexibility – there is an available tee in front and behind the tee they elected to use when the overall course length from the back tee is at least 6800 yards.**
 - **Usage of the back tee drops to 5% or less once the course exceeds 6800 yards.**

Count back for Women, forward for Men

Option 2:

For women: Start with the front tee and count back with the third and all longer tees group as “other”

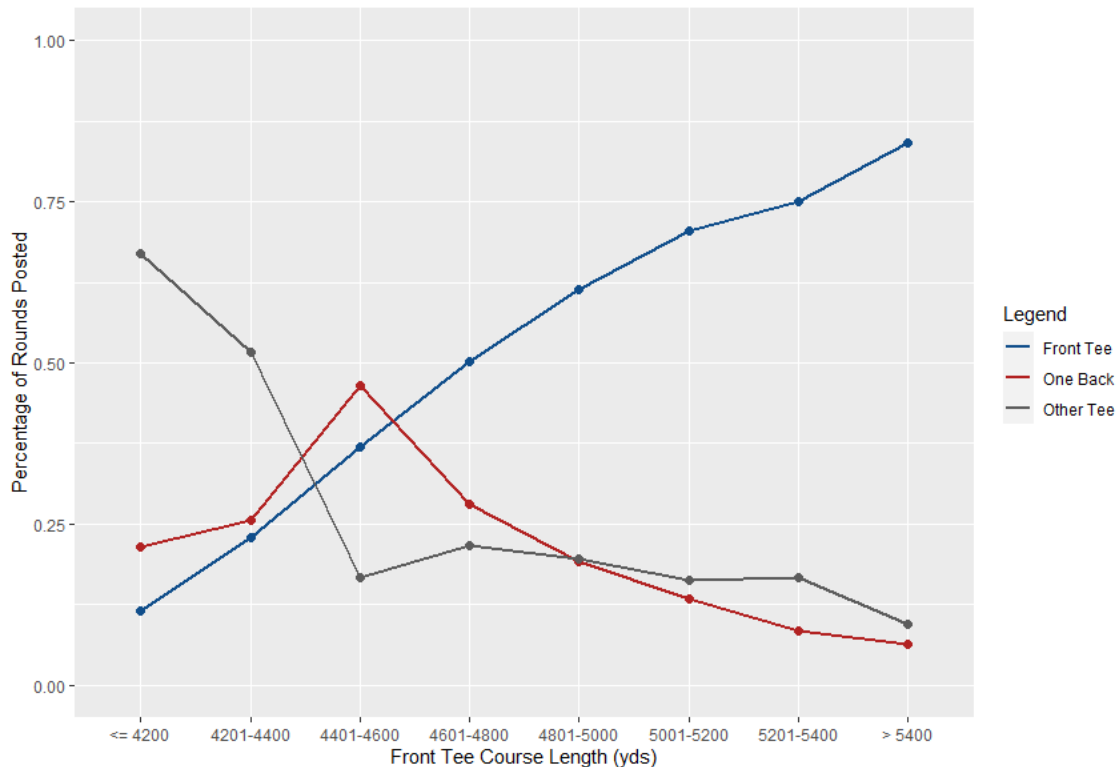
For men: Start with the back tee and count forward

Breakdown of Female Tee Utilization

(Counting back from forward tee)

- **As the most forward tee gets longer, it is used increasingly more by women and utilization of longer tees decreases**
 - **Once the forward tee is more than 4800 yards, it is predominately used (>62%)**

Female Golfer Tee Box Selection vs. Front Tee Course Length

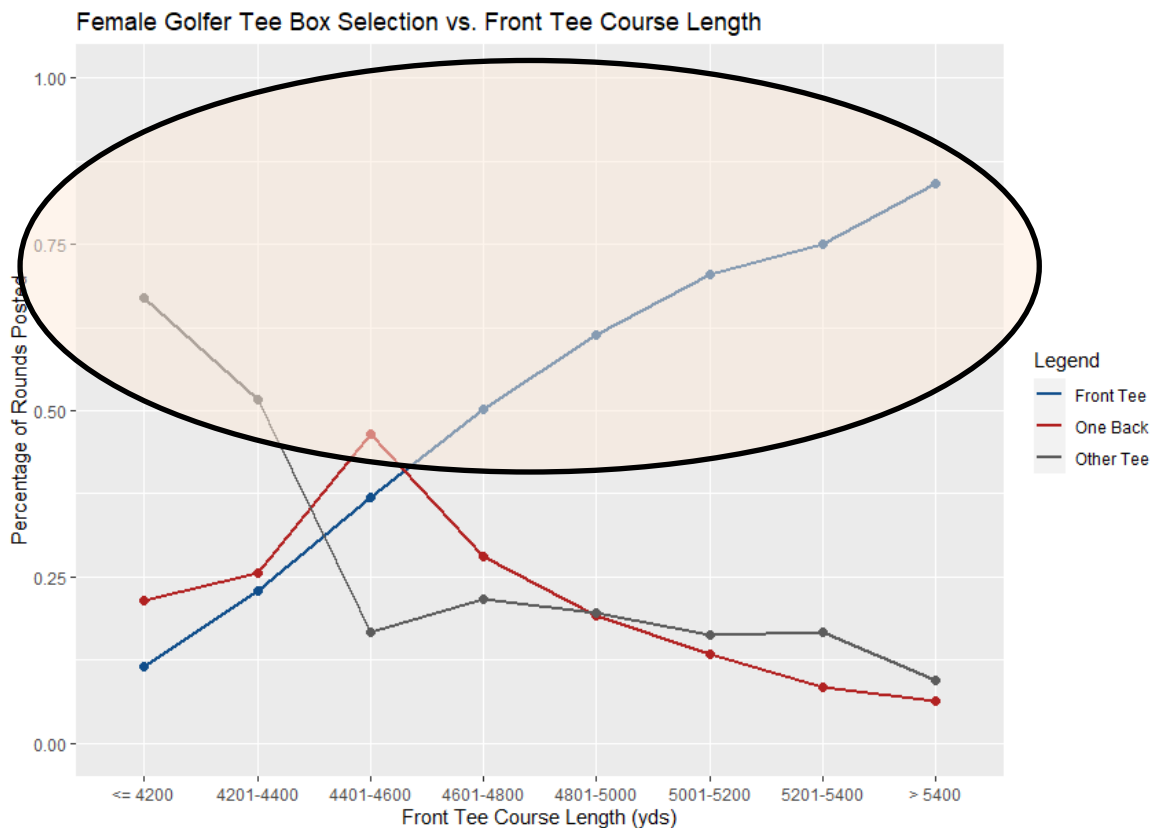


Most Utilized Playing Length - Female

(Counting back from forward tee)

This chart also shows that for female golfers who post scores, the most popular tee selected is:

- **3rd (or more) longest for courses with a forward tee shorter than 4400 yds**
- **2nd longest option for 4400 - 4600**
- **Front tee once courses most forward option is longer than 4600 yds.**

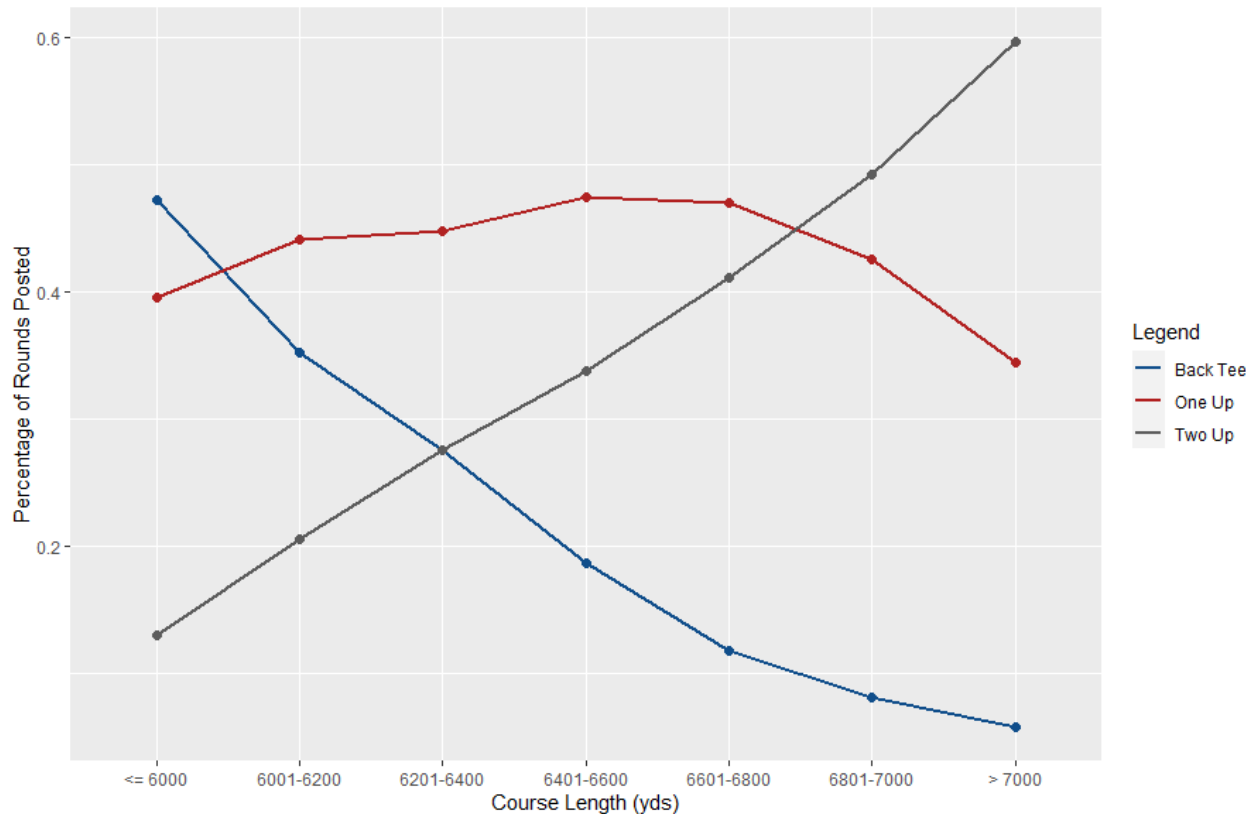


Breakdown of Male Tee Utilization

(Counting back from forward tee)

- **Back tee is least used for courses over 6400 yards and drops below 10% when the course is longer than 6800 yards**
- **One-up tee gets consistent usage, regardless of course length**
- **Two-up tee usage increases as course length increases**

Male Golfer Tee Box Selection vs. Course Length

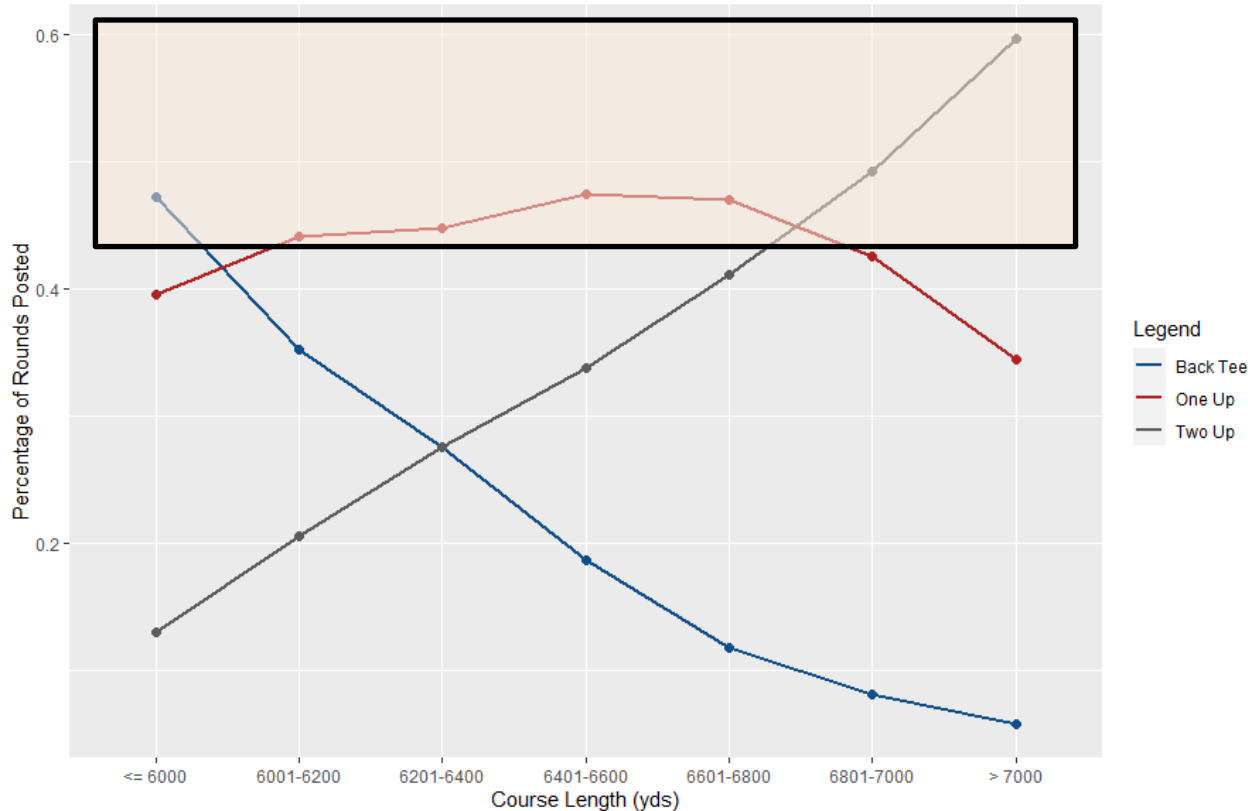


Most Utilized Playing Length - Male

(Counting back from forward tee)

- **Back tee is the most used tee for courses less than 6000 yards and drops below 10%**
- **One-up tee is most used for courses 6000 – 6800 yards long**
- **Two-up tee becomes the most used above 6800 yards in overall course length**

Male Golfer Tee Box Selection vs. Course Length

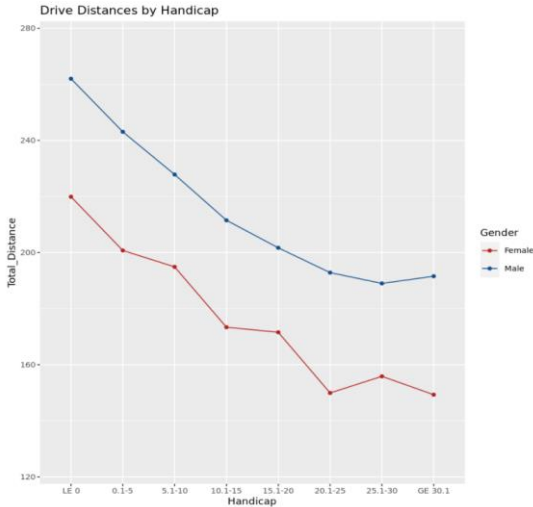


An aerial photograph of a golf course. The foreground is dominated by a large, irregularly shaped water hazard with several small islands of land. The surrounding golf course terrain is green and hilly, with various fairways and greens visible. The lighting suggests a bright, sunny day, casting soft shadows across the landscape.

Assessment of Golfers Playing Length Decisions

Methodology to Assess Golfer Behaviors

Option 1: Use the mean driving distance for each handicap bin



Handicap Bin	Male Driving Distance (yds)	Female Driving Distance (yds)
<= 0	262	219
0.1 - 5	243	201
5.1 - 10	228	195
10.1 - 15	212	173
15.1 - 20	202	172
20.1 - 25	193	150
25.1 - 30	190	156
>= 30.1	192	149

Both male and female hitting distances decrease with increasing handicap until they plateau above handicap of approximately 20

Assessment of Female Golfer Behaviors

Option 1: Use the mean driving distance for each handicap bin

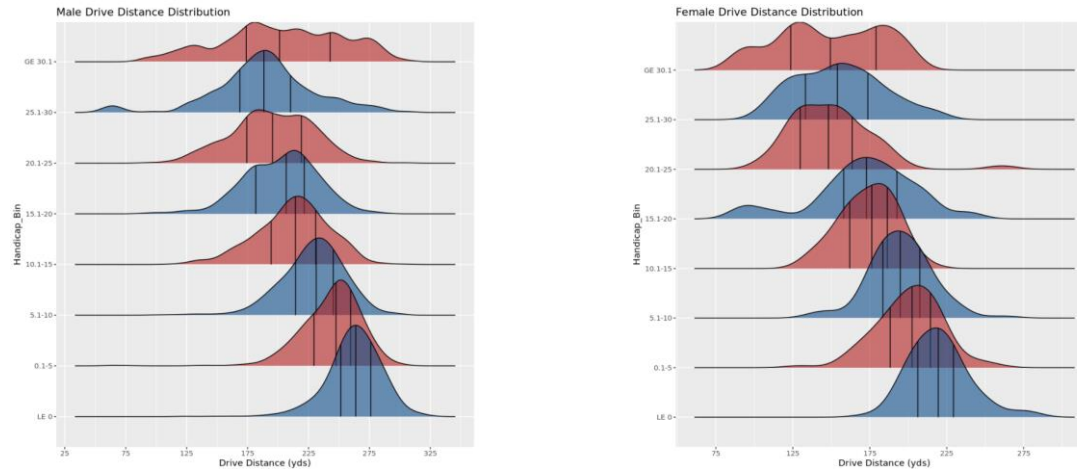
The basis for determining the recommended driving distance for golfers is based on the Longleaf System

Female Table					
	Appropriate Tee				
Handicap Range	Lower Bound	Upper Bound	Too Short %	Approp. Tee %	Too Long %
< 0	5,355	5,855	12.9%	31.4%	55.7%
0.0-5.0	4,880	5,380	5.2%	34.1%	60.7%
5.1-10.0	4,722	5,222	4.0%	40.8%	55.2%
10.1-15.0	4,141	4,641	0.9%	4.2%	95.0%
15.1-20.0	4,114	4,614	1.3%	5.8%	92.9%
20.1-25.0	3,534	4,034	1.0%	1.0%	98.1%
25.1-30.0	3,692	4,192	1.9%	2.4%	95.8%
GT 30	3,507	4,007	3.4%	2.9%	93.7%

- The table shows that scratch or better female golfers should play courses from 5355 yards to 5855 yards. This range is defined as a 500-yard window around the midpoint. Of the golfers in this skill level range, about 31% are estimated to play tees in this range. 56% play longer courses and 13% play shorter courses.
- The table also shows that as skill level decreases, the number of golfers playing “too long” a course quickly increases to at least 90% above 10 handicap.

Methodology to Assess Golfer Behaviors

Option 2: Use a driving distance distribution for each handicap bin



The two charts show the shape of the driving distribution for both male and female are normally distributed for lower handicaps and are not normally distributed (bell shaped curve) at higher handicaps.

Assessment of Female Golfer Behaviors

Option 2: Use the driving distance distribution for each handicap bin

The basis for determining the recommended driving distance for golfers is based on [Setting up for Success](#)

Female Table					
	Appropriate Tee				
Handicap Range	Lower Bound	Upper Bound	Too Short %	Approp. Tee %	Too Long %
< 0	6,168	6,668	38.3%	34.8%	26.9%
0.0-5.0	5,661	6,161	28.9%	29.4%	41.7%
5.1-10.0	5,491	5,991	31.9%	31.6%	36.5%
10.1-15.0	4,871	5,371	8.4%	21.5%	70.2%
15.1-20.0	4,843	5,343	19.1%	18.2%	62.7%
20.1-25.0	4,222	4,722	4.8%	9.9%	85.2%
25.1-30.0	4,392	4,892	10.9%	14.4%	74.7%
GT 30	4,194	4,694	11.1%	12.6%	76.3%

- The table shows that scratch or better female golfers should play courses from 6168 yards to 6668 yards. This range is defined as a 500-yard window around the midpoint. Of the golfers in this skill level range, about 35% are estimated to play tees in this range. 27% play longer courses and 38% play shorter courses.
- The table also shows that as skill level decreases, the number of golfers above 10 handicap playing “too long a course” quickly increases to 63% – 85% and the “within the range” drops to 10 – 22%.

Summary of Golfer Behaviors Assessment: Comparing All Three Systems Using Both 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%

- **The results show that regardless of the system used, male golfers play too long a course using the analysis Method 2 (more conservative) 48% - 68% of the time and female golfers play too long a course 72% - 90% of the time.**
- **From the previous slides, we know that:**
 - **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!**

An aerial photograph of a wetland landscape. The image is dominated by a large, circular area of vibrant green vegetation on the right side. To the left and in the center, there is a complex network of light-colored, sandy or silty water channels and mudflats, interspersed with patches of brownish-green vegetation. The overall scene suggests a coastal or estuarine environment. The text "Results and Implications" is overlaid in white, bold font on the left side of the image.

Results and Implications

Key Takeaways – Part 1

- Overall course lengths in the United States are fairly evenly distributed from less than 6000 yards to over 7000 yards while front tee playing lengths are most frequently 4800 – 5200 yards.
- The number of rated tees per course increases from 2 ½ to 6 for male golfers as courses get longer and from 2 to 4 for female golfers as front tee lengths get shorter.
- Male golfers play from 6100-yard tees on average and female golfers play from 5100-yard tees on average with playing distance strongly correlated to Handicap Index; on average, better golfers play longer tees.
- The overall number and average number of postings by female golfers increase as front tee length decreases.

Key Takeaways – Part 2

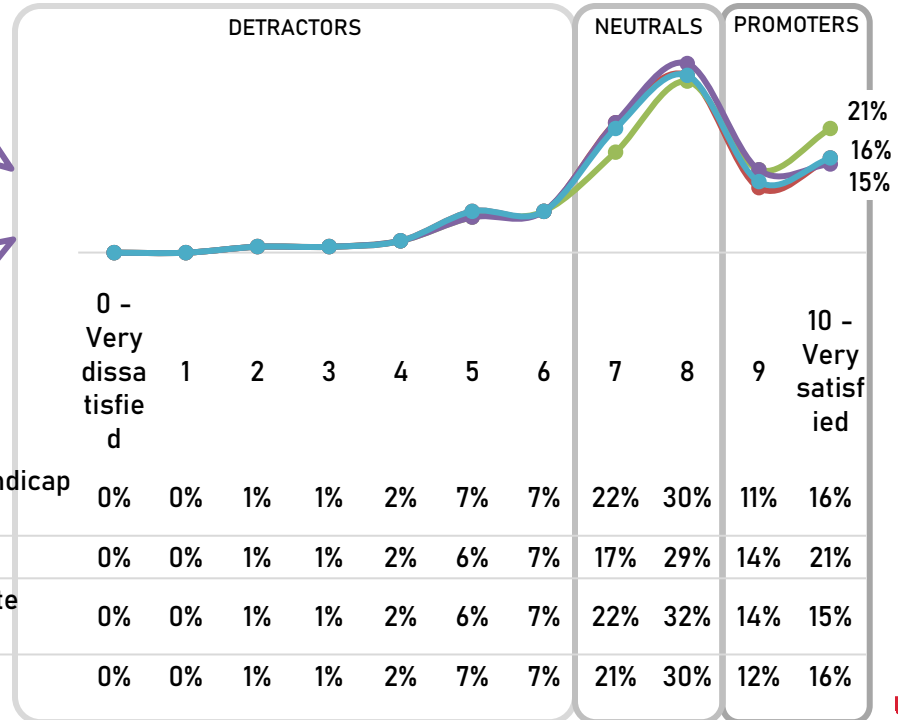
- The back tee is only the most utilized tee by men for courses shorter than 6000 yards and is used less than 10% of the time on courses more than 6600 yards (only 3% on 7000-yard courses)
- **The most forward rated tee for females is utilized the most for courses 4600 yards or longer**
- It is not until forward tees are offered shorter than 4200 yards that female golfers appear to have the same flexibility of choice that male golfers enjoy on average (>85% of golfers have a tee shorter and longer than they choose to play)
- **When using the Longleaf system to determine recommended playing lengths for golfers, at least 62% of male golfers and at least 80% of female golfers *play too long a course* on a daily basis!**

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.

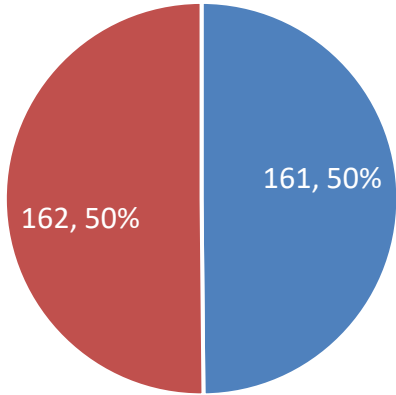
- Handicap: 29+ / no handicap (3047)
- Short drive (2615)
- Less than 50% accurate (4220)
- Score 100+ (2061)



Base numbers shown in brackets

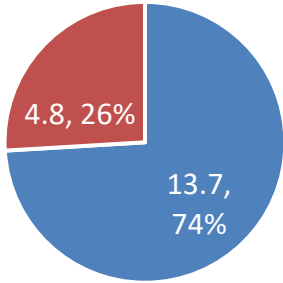
U.S. versus Golfing Populations in 2016

United States
(millions)



■ Male ■ Female

Golf
(millions)



■ Male ■ Female

Proportion of Golfers in U.S. by Gender

Females	Males
3.0%	8.5%

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!**

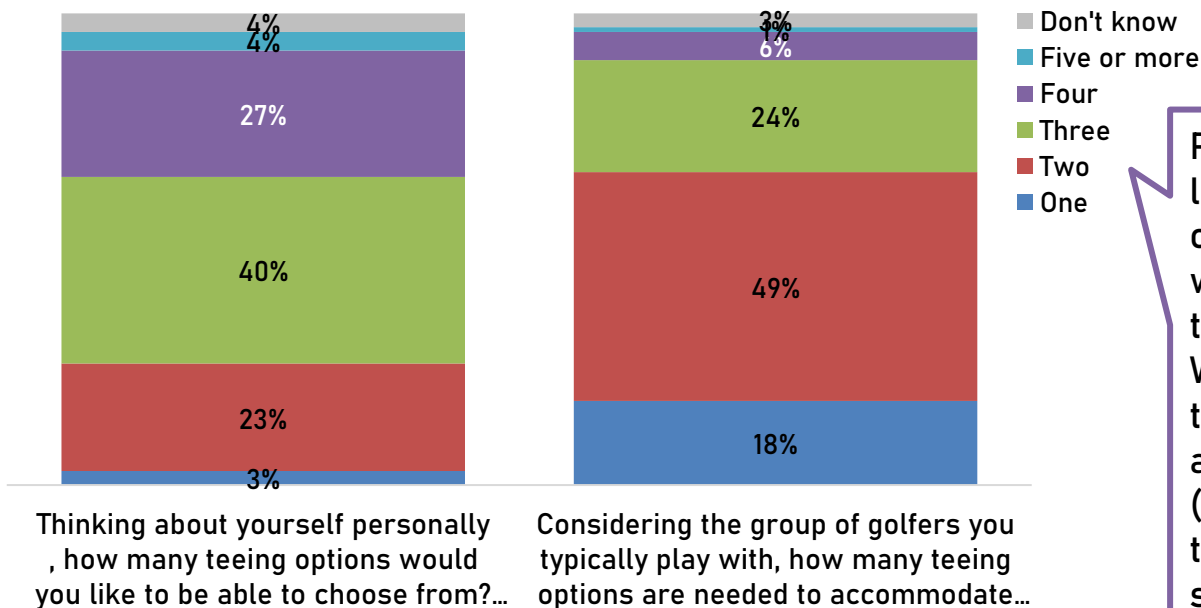
An aerial photograph of a golf course featuring a large, irregularly shaped water hazard in the center. The water is a dark, still blue-grey color, surrounded by green grass and some brownish, vegetated islands. The surrounding golf course terrain is a mix of vibrant green and yellowish-green, with various mounds and depressions. A winding path or road is visible on the right side of the image. The overall scene is captured from a high angle, providing a comprehensive view of the course's layout.

What do golfers want?

Tee Selection: Personal vs Group Options

Q. Thinking about yourself personally, how many teeing options would you like to be able to choose from?

Q. Considering the group of golfers you typically play with, how many teeing options are needed to accommodate the different skill and hitting length abilities?

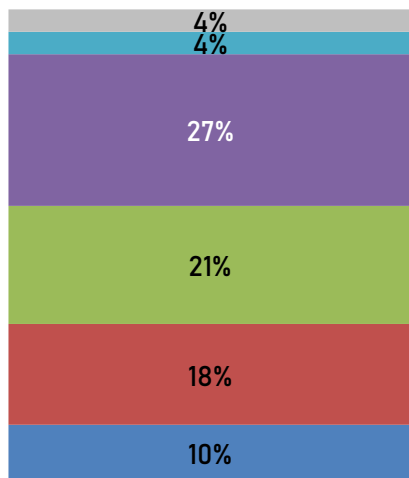


Personally, golfers would like to have a range of teeing options, with 71% saying they would like three or more tees to choose from. When asked about their typical playing group, an almost equal proportion (67%) said that just one or two teeing options would be sufficient.

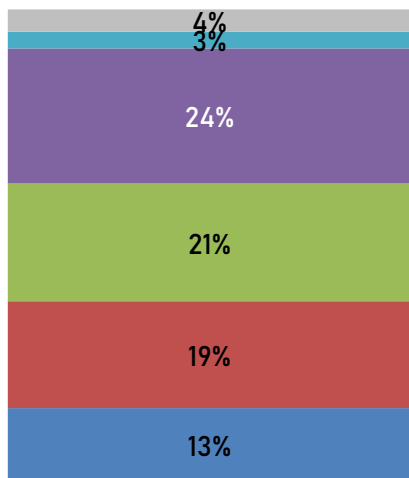
Tee Selection: Personal vs Group Tee Length

Q. And what yardage difference between teeing options (total course length) is ideal for you personally?

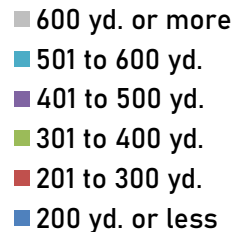
Q. And what yardage difference between teeing options (total course length) is ideal for your group?



And what yardage difference between teeing options (total course length) is ideal for...



And what yardage difference between teeing options (total course length) is ideal for...



Opinions were similar when asked what yardage difference between teeing options would be ideal for golfers themselves and for their group.

45-48% gave the range of 301-500 yards of separation between tee options as being ideal for themselves or for their group.

Course Presentation Recommendation - Draft

Facilities should determine what portion of the golfer population they intend to serve and then provide playing length options based on golfers' preferred hole lengths by par.

- Playing Lengths of Par 3 holes should range from +/- 30% of a golfer's 6-iron distance
- Playing Lengths of Par 4 holes should range from +/- 15% of a golfer's Driver + 7-iron distance
- Playing Lengths of Par 5 holes should range from +/- 10% of a golfer's Driver + Fairway Wood + PW distance
- Overall recommended course lengths are built up from a variety of short, medium and long holes and easily adapted for courses of par other than 72.

Alternative Recommendation - Draft

Facilities should determine what portion of the golfer population they intend to serve and then provide playing length options based on golfers' preferred hole lengths by par.

- Playing Lengths of Par 3 holes should average 110% of a golfer's 7-iron distance and range from 66% to 138% (2/3rds to 1.4x)
- Playing Lengths of Par 4 holes should average 260% of a golfer's 7-iron distance and range from 184% to 296% (1.85x to 3x)
- Playing Lengths of Par 5 holes should average 345% of a golfer's 7-iron distance and range from 296% to 394% (3x to 4x)
- Notice that the Par 4 & 5 holes have a smooth transition but there is a gap between the longest par3 and shortest par 4 – does this mean that golfers don't enjoy a “drivable par 4”?

Full-service Golf Facility (>90% of golfers)

- Range of playing length options from 3600 to 6800 yards
 - **Ideally this is effective playing length**
- Physical or Combo / Blended Tees every 400 yards
 - 9 playing length options
 - **For example: Physical Tees (qty = 5) at: 3600, 4400 [ave. female = 4350], 5200, 6000 [ave. male = 6100], 6800 yards**
 - Average distance between physical tee boxes on holes
 - Par 3 = 20 yards
 - Par 4 = 40 yards
 - Par 5 = 60 yards
 - **Combo or Blended Tees (qty = 4) at: 4000 4800, 5600, 6400 yards**

Additional Course Presentation Recommendations - Draft

- Golf courses should use easily identifiable tee names or colors that do not carry gender or age-related associations which could discourage use.
- **Golf courses should offer comparable presentation and conditioning on all sets of tees – including those on the forward end of the spectrum.**
- Forced carries present an interesting, but unequal challenge for golfers with differing hitting distances. The maximum forced carry encountered anywhere on the course for each playing length option should be communicated to golfers prior to their tee selection decision.
- **Course ratings should be provided for all players from all sets of tees.**

Industry Challenge

- Even though this is what golfers say they want (and enjoy it when they try), score posting data shows it is not what they do.

Why?

- Ego
- Not giving into aging
- Pride
- Lack of knowledge – following the leader

We all need to provide leadership and tools to drive change

- 1. Tees need to be provided**
- 2. Barriers to use best tee by golfers need to be reduced or eliminated**
 - a) Gender or age labels including standard color schema**
- 3. Golfers need objective options to measure their hitting distance**
- 4. We need to provide effective tools and support for golfers to determine their ideal playing length based on the abilities**

Future

If we do this, satisfaction, retention, participation and industry revenue will increase!

Acknowledgement

Thanks for the excellent work by USGA staff, especially **Lexi McCormick-Smith (GHIN)** for running the database queries and **Stephen States (Green Section)** for analysis and presentation through tables and graphs!!

Questions?

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