



# 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 sand trap with several smaller mounds of sand. The surrounding area is covered in grass, some of which appears slightly brown or dry. 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

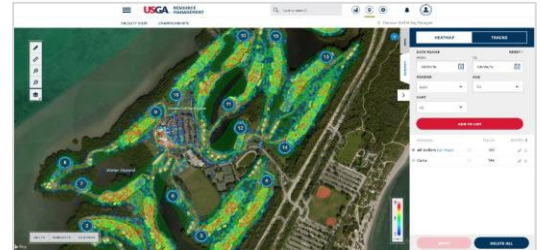


Our purpose is to **U**nify the golf community, to **S**howcase the golfers who inspire us, to **G**overn the sport to ensure a solid foundation and to **A**dvance the good of the game, for the next 100 years and beyond.

## 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





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 and rough areas in shades of brown and tan. The text is overlaid 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 other parts of the course or surrounding vegetation. 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. To its left is a complex sand trap with several interconnected holes and a narrow channel. The surrounding areas are 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%)**



An aerial photograph of a golf course, showing a large, irregularly shaped water hazard in the center. The surrounding greenery is lush and vibrant, with various shades of green and yellow. The water hazard is a prominent feature, surrounded by a grassy bank. The overall scene is a typical view of a golf course from an elevated perspective.

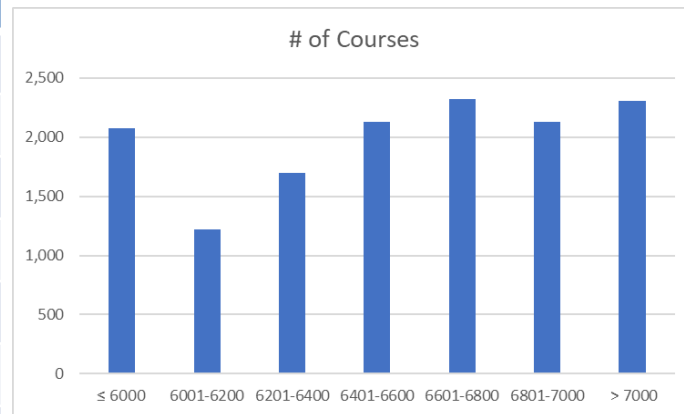
# Course Length Characterization

“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%

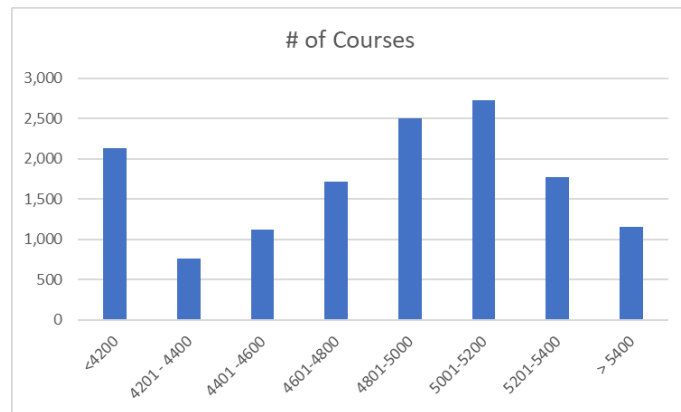




# Distribution of Courses by Front Tee Length

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 areas, possibly sand traps or dry grass. The text is overlaid on the image.

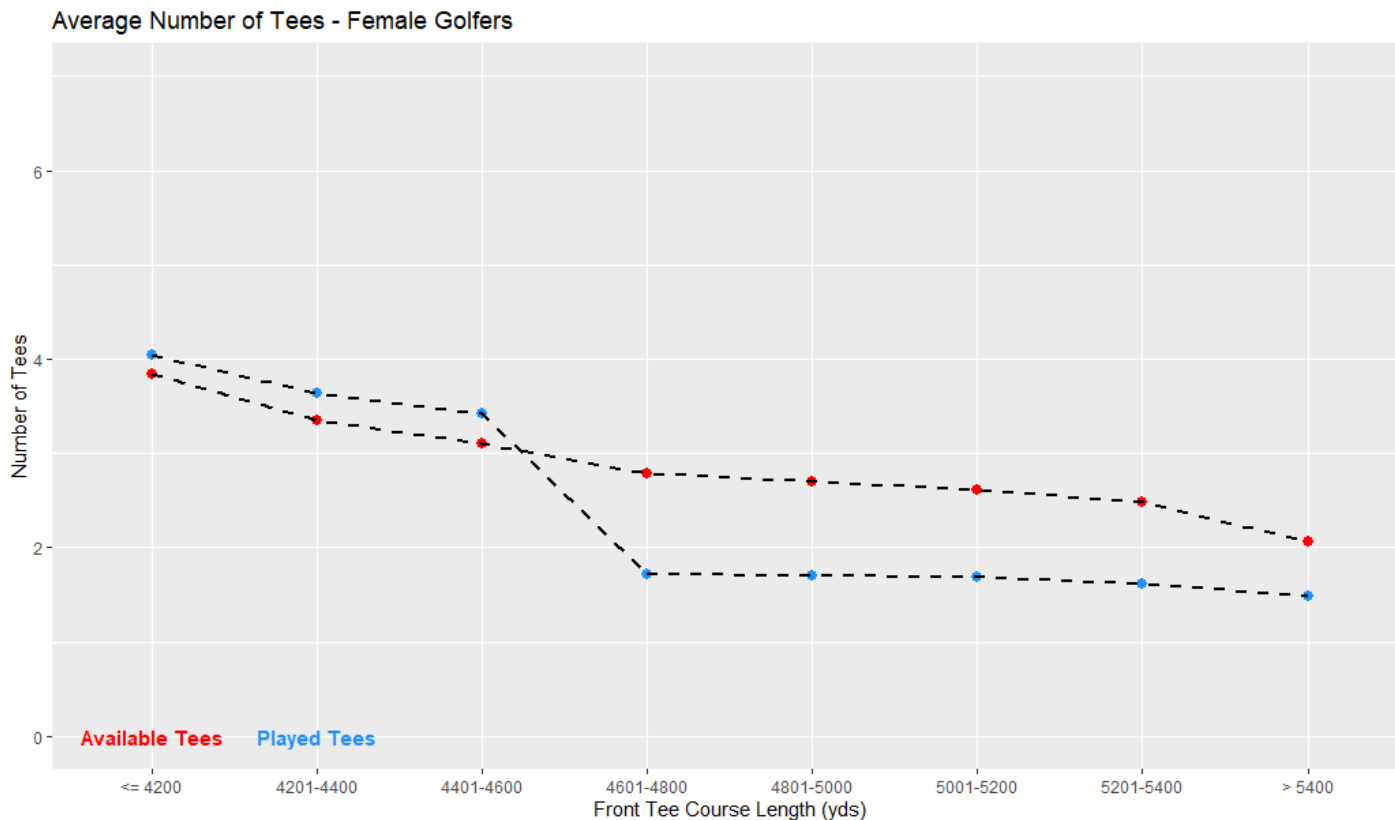
Tee Availability for Golfers to Use

“Supply - Tees”



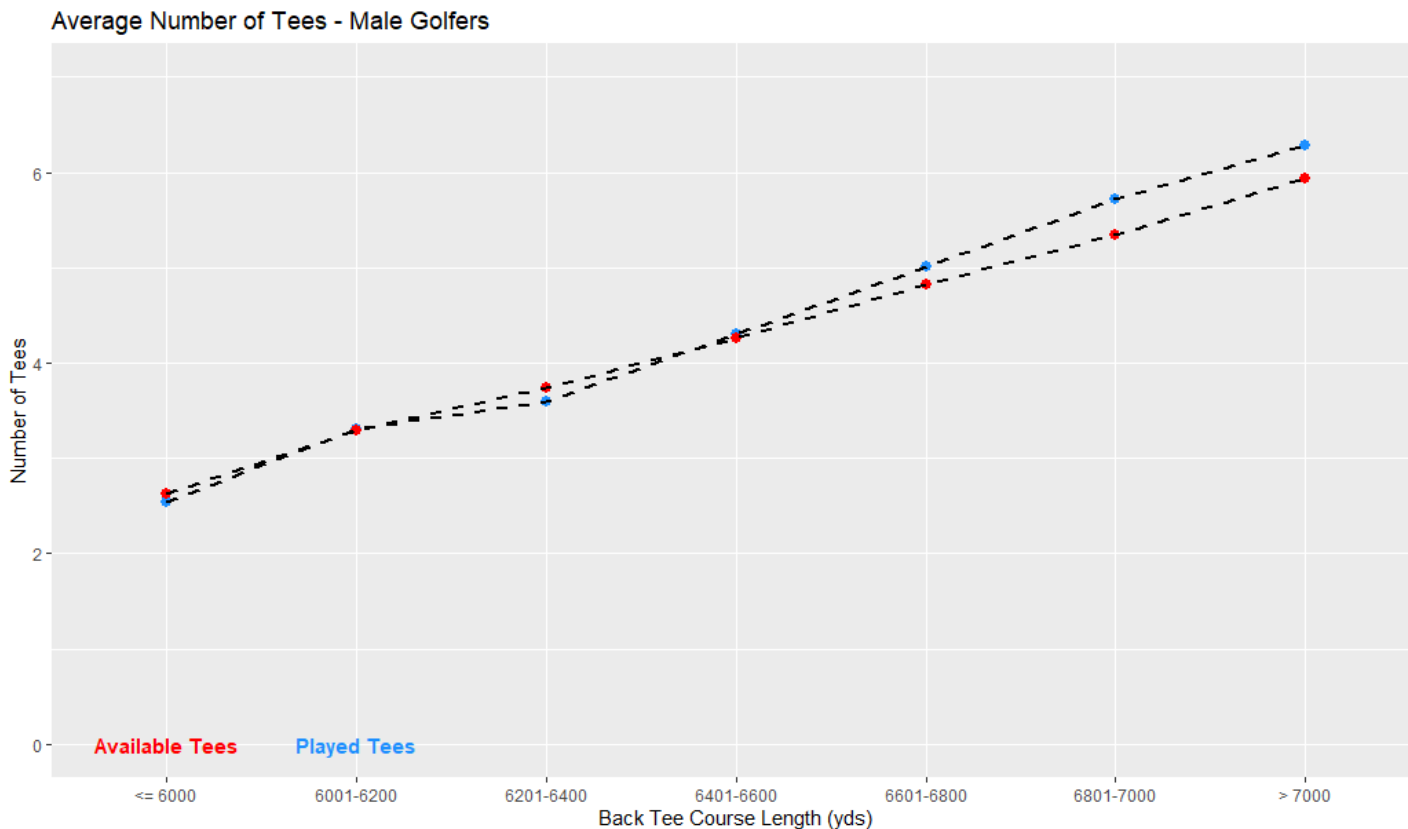
# Number of Rated Tees Available - Female

**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**







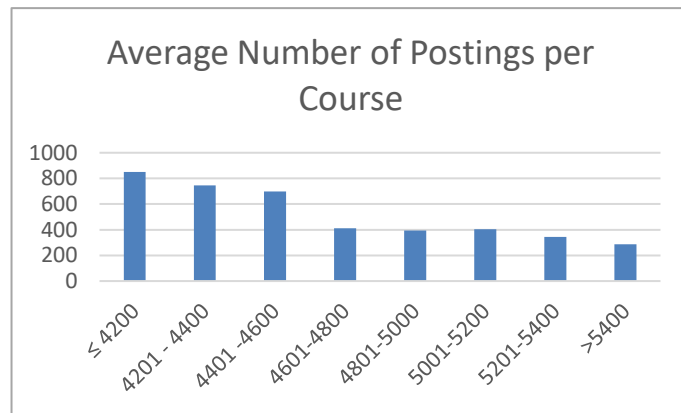
# Course Utilization by Golfers Utilizing Handicap Service

“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

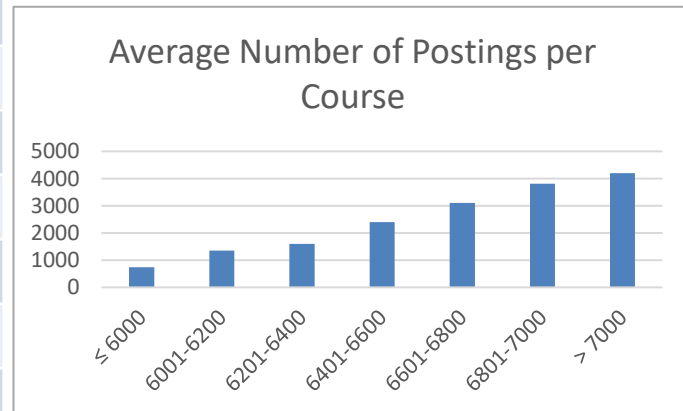




# Male Scores Posted by Overall Course Length

**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

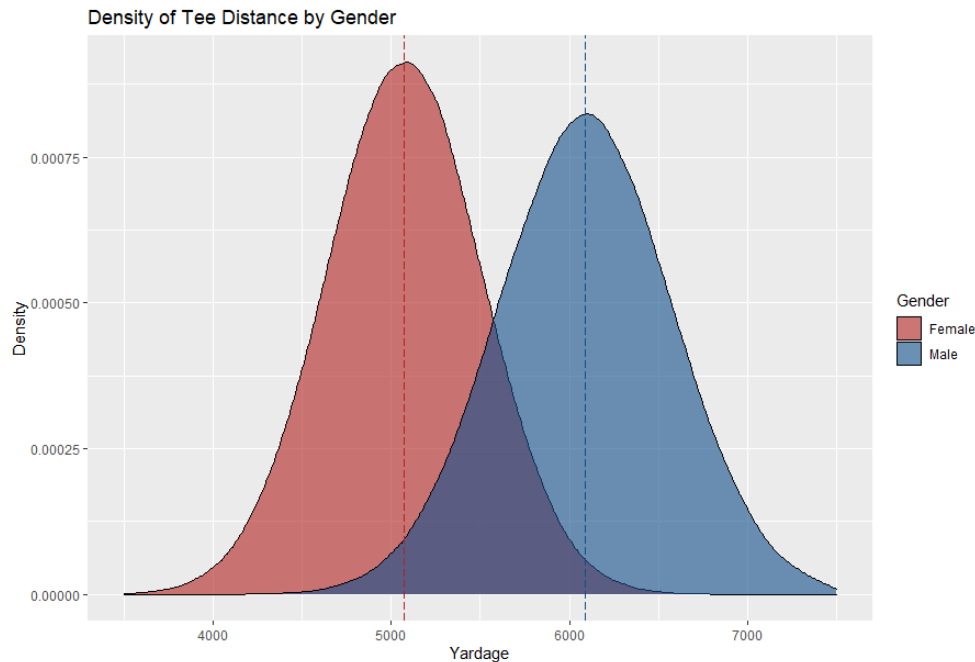
**The ratio of men/women decreases as playing options for courses get shorter (women post at an increasingly higher frequency relative to men)**

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 or fairway 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**

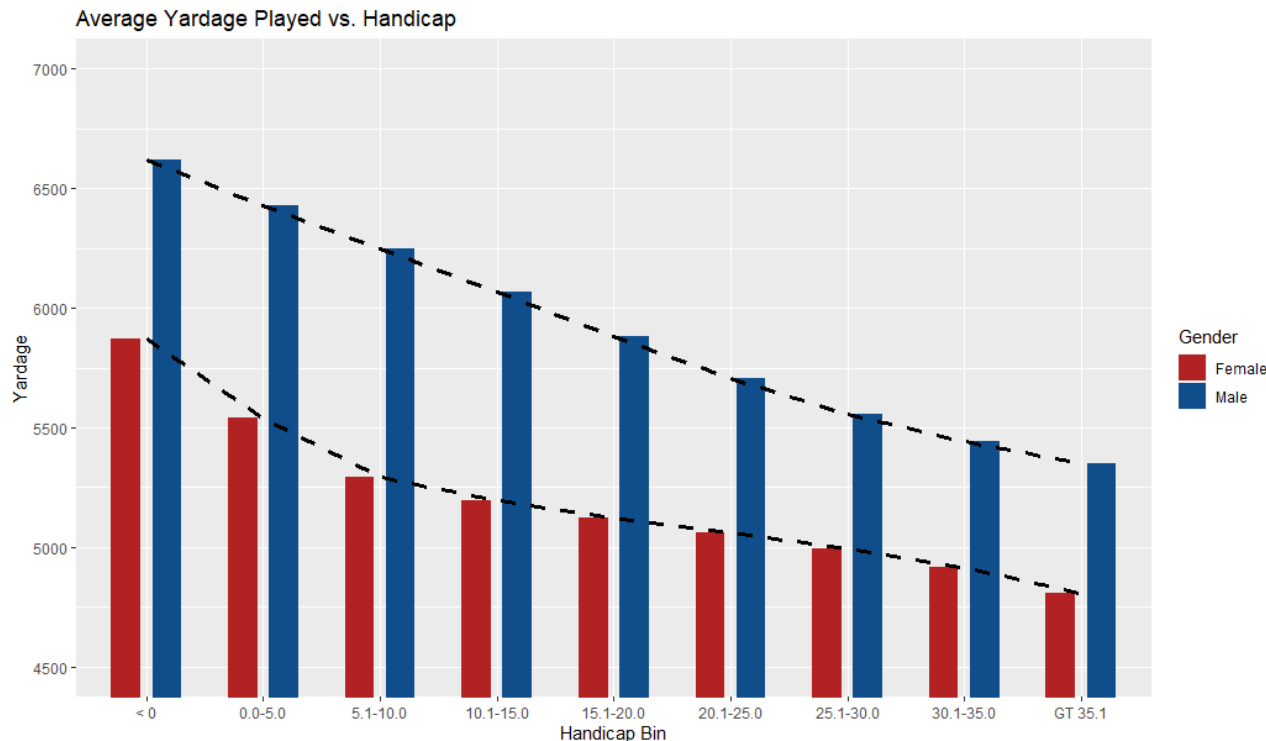
**The male distribution is wider, and the peak is shorter indicating that males use a larger range of playing distances**

**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

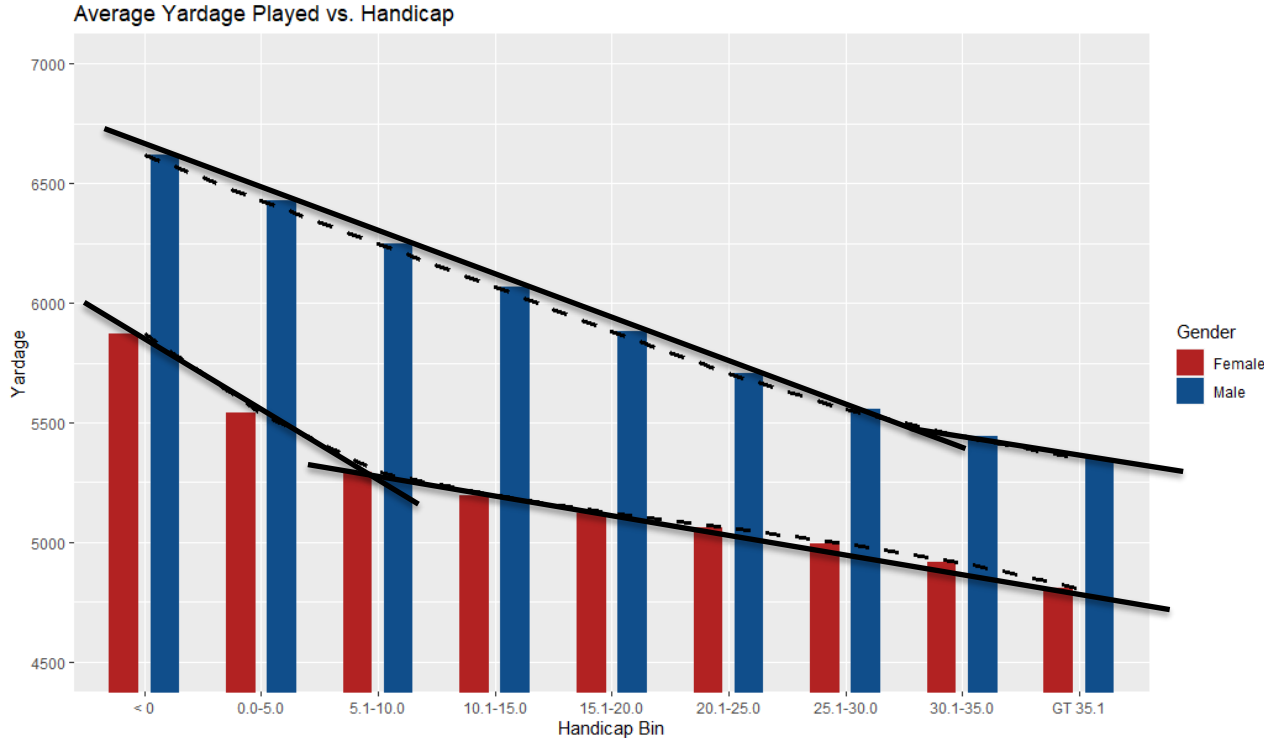


**Better golfers play longer tees for both genders**

**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”

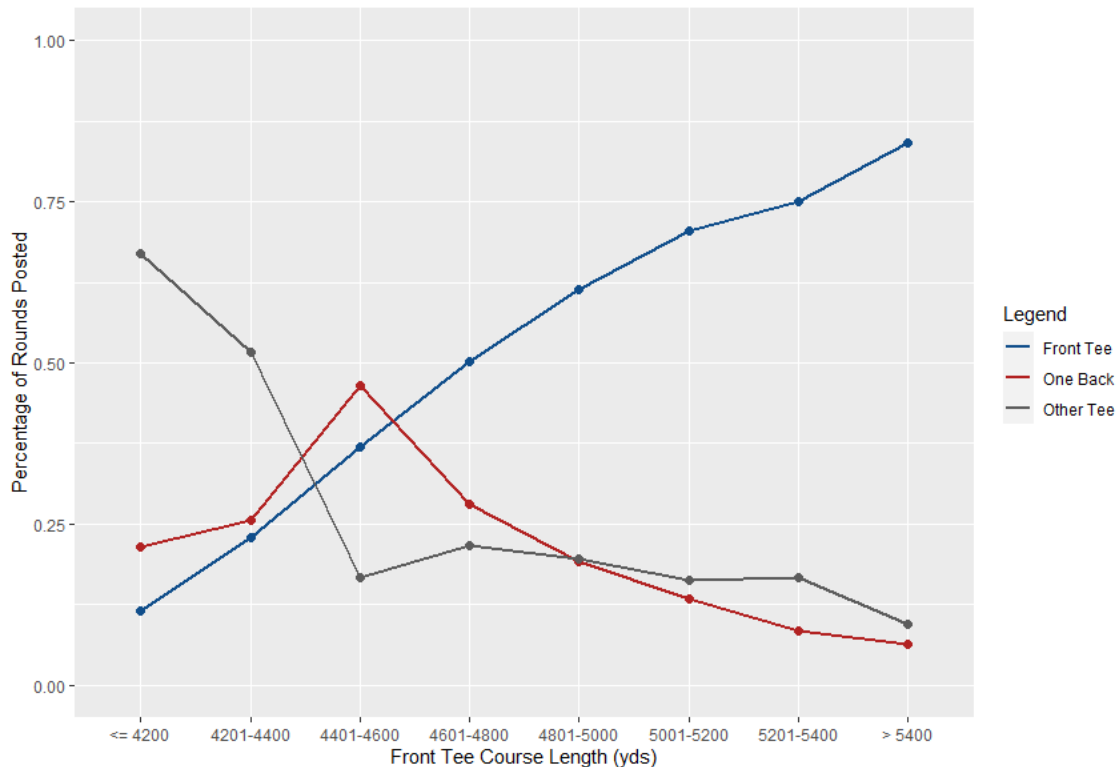
**For men:** Start with the back tee and count forward

# 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

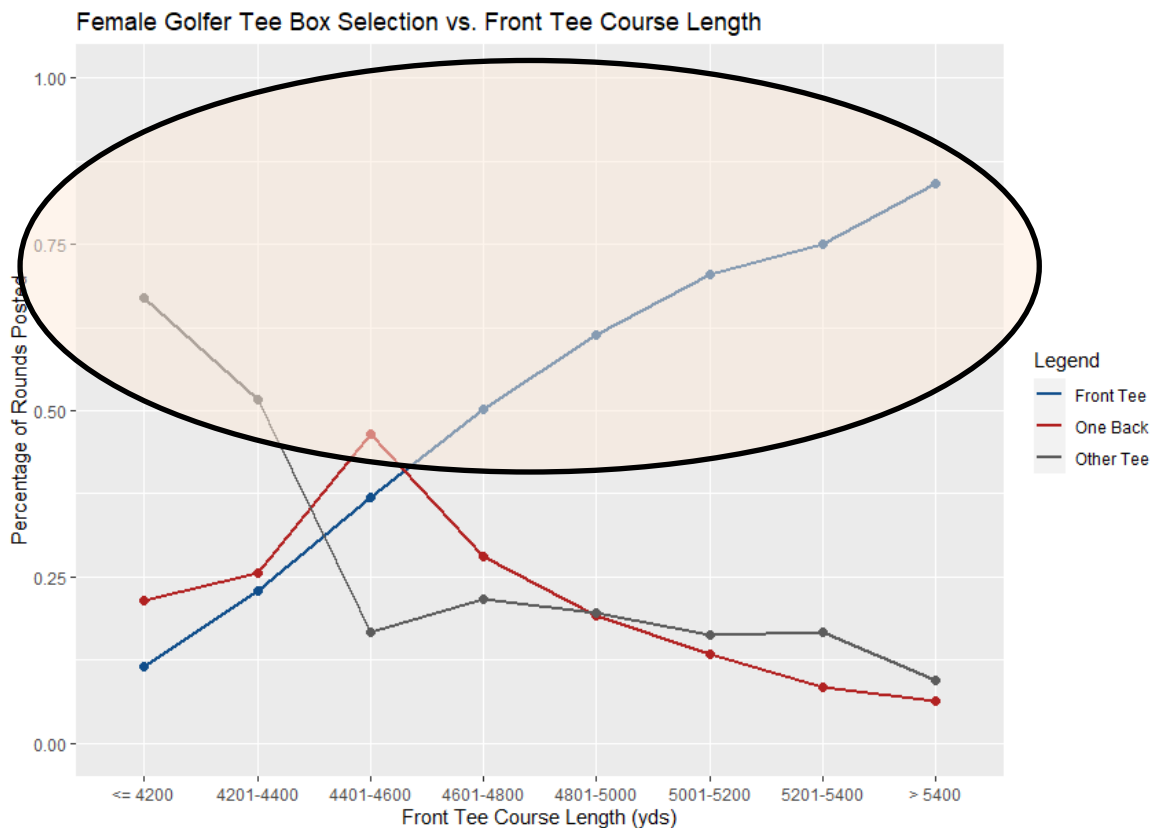


# Most Utilized Playing Length - Female

(Counting back from forward tee)

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

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



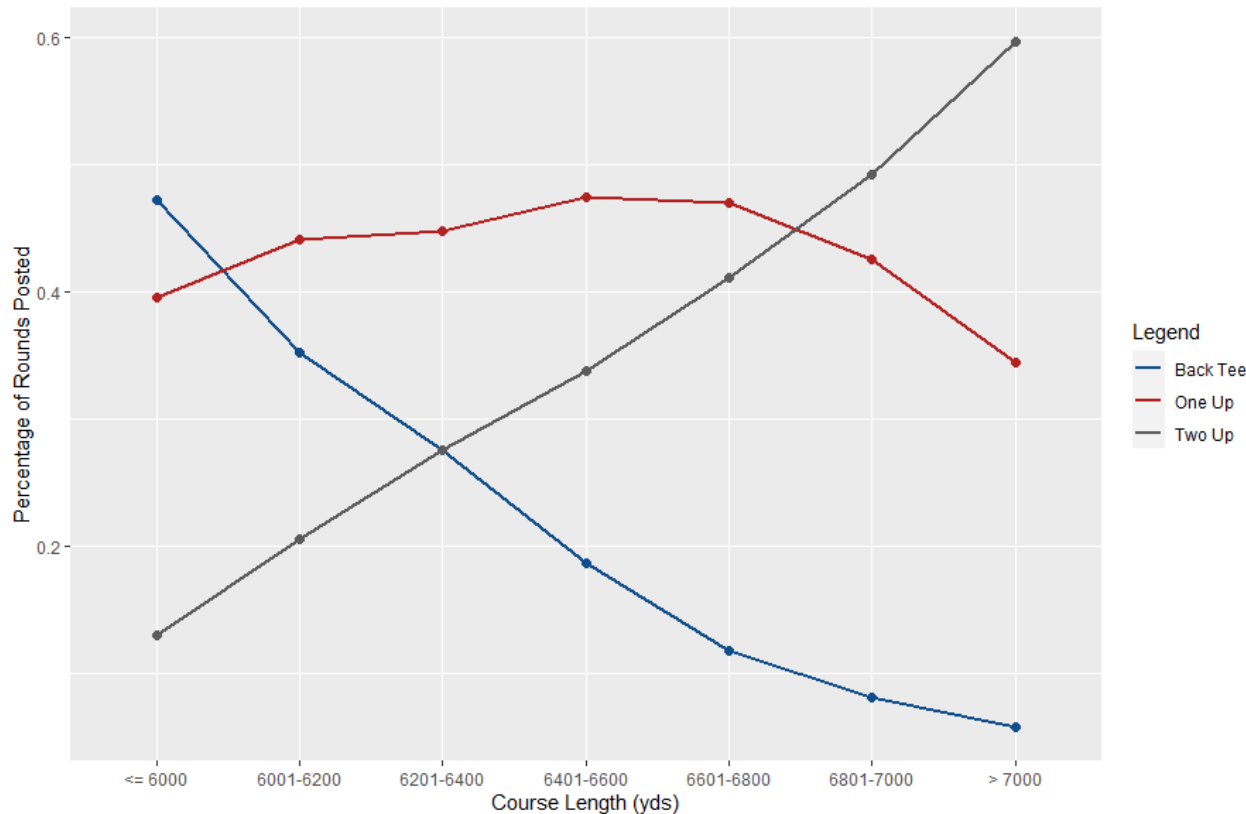


# Breakdown of Male Tee Utilization

(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

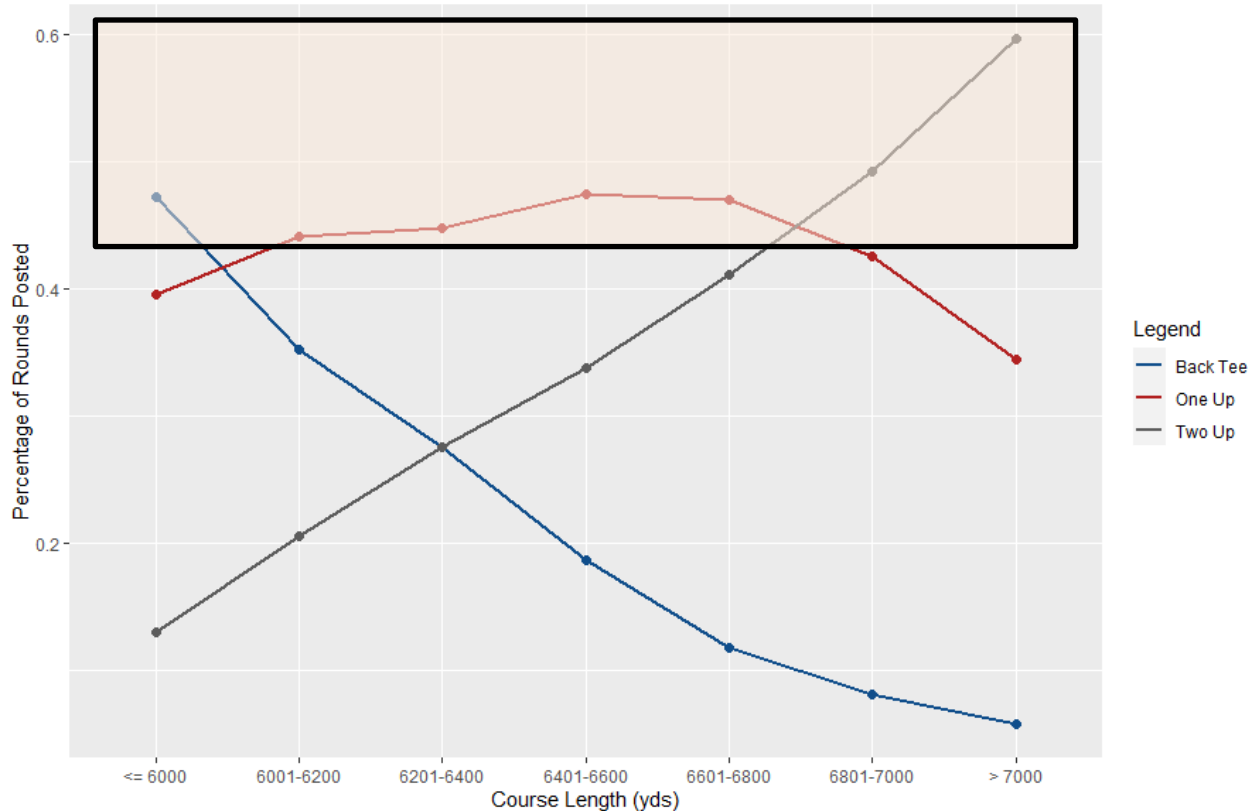


# Most Utilized Playing Length - Male

(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

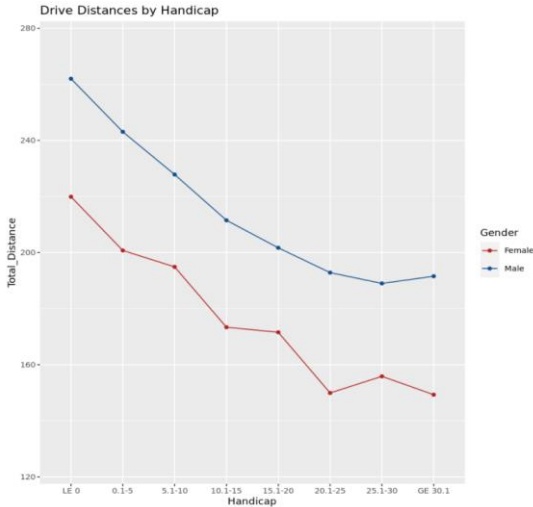


An aerial photograph of a golf course. The foreground is dominated by a large, irregularly shaped water hazard with several small islands. The surrounding greenery is lush and vibrant, with various shades of green and yellow. The background shows more of the golf course's layout, including fairways and additional water features. The overall scene is captured from a high angle, providing a comprehensive view of the terrain.

# 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

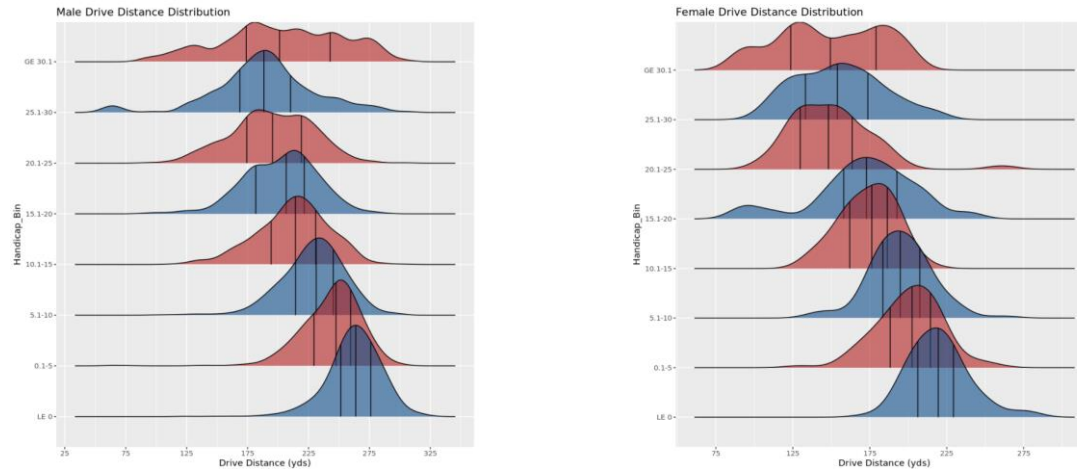
The basis for determining the recommended driving distance for golfers is based on the Longleaf System

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 coastal wetland. The image shows a complex network of water channels and mudflats in shades of brown and tan, interspersed with patches of green vegetation. A prominent feature is a large, smooth, circular area of bright green, which appears to be a well-maintained lawn or a specific type of wetland vegetation. The overall scene is captured from a high angle, showing the intricate patterns of the landscape.

# 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

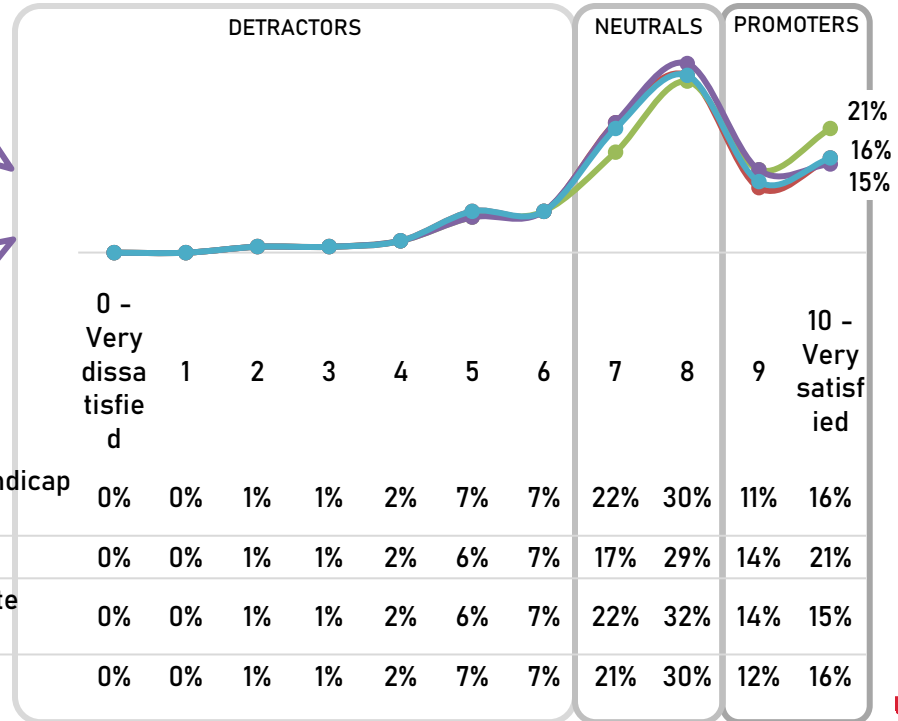
- The back tee is only the most utilized tee by men for courses shorter than 6000 yards and is used less than 10% of the time on courses more than 6600 yards (only 3% on 7000-yard courses)
- **The most forward rated tee for females is utilized the most for courses 4600 yards or longer**
- It is not until 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)

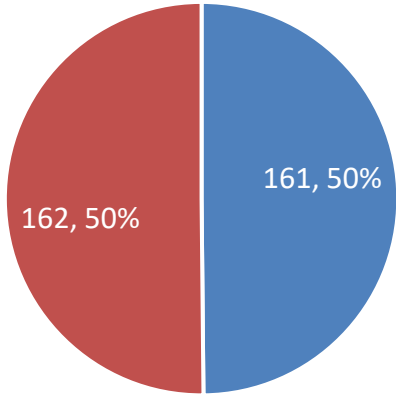


Base numbers shown in brackets



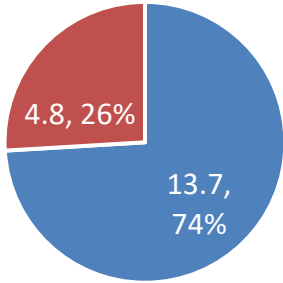
# U.S. versus Golfing Populations in 2016

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!**

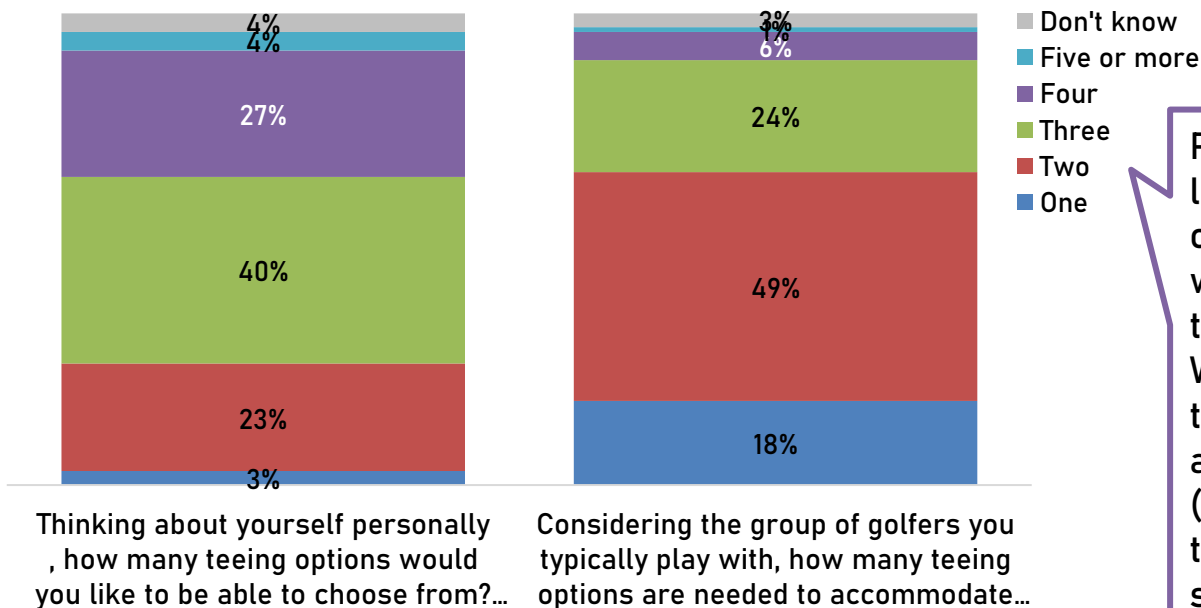
An aerial photograph of a golf course featuring a large, irregularly shaped water hazard in the center. The water is a dark, still blue-grey color, surrounded by green grass and some brownish-yellow patches. The surrounding landscape is a mix of green and yellowish-green, with rolling hills and a winding path or road visible on the right side. The lighting suggests a bright, sunny day.

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?

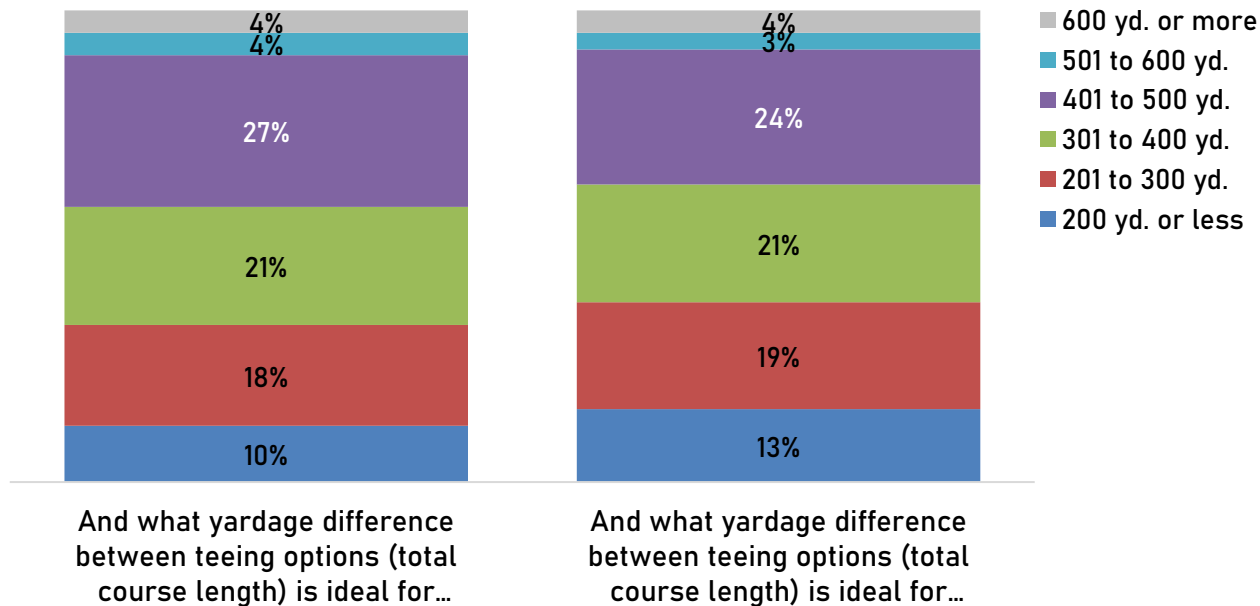


Personally, golfers would like to have a range of teeing options, with 71% saying they would like three or more tees to choose from. When asked about their typical playing group, an almost equal proportion (67%) said that just one or two teeing options would be sufficient.

# 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?



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.



# 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**

# 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?

## Contact:

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**USGA**<sup>®</sup>

**For all golf is and all it can be.**



An aerial photograph of a golf course. On the right side, there is a large, circular green with a vibrant green color. To its left is a complex sand trap system consisting of several interconnected, irregularly shaped sand areas. The surrounding areas are covered in grass, appearing in shades of brown and green. The text "Extra Slides" is overlaid on the left side of the image.

Extra Slides



OUR MISSION:

To **champion** and  
**advance** the game  
of golf







## WHERE WE SERVE:

We are a non-profit organization dedicated to leading and defining the game **globally**.

We serve millions of golfers and thousands of golf courses both within the **United States** and around the world through programs and services that deepen their connection to the game.



# Scores Posted by Course Length Bin

Back Tee Course Length	Male Scores Posted	Female Scores Posted	Ratio of Male to Female
≤ 6000	1,920,192	444,191	4.32
6001-6200	2,132,170	370,871	5.75
6201-6400	3,668,857	620,278	5.92
6401-6600	6,757,182	1,185,758	5.70
6601-6800	9,227,870	1,572,064	5.87
6801-7000	10,144,224	1,693,738	5.99
> 7000	12,493,056	1,957,839	6.38

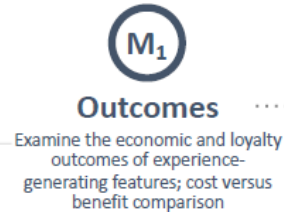
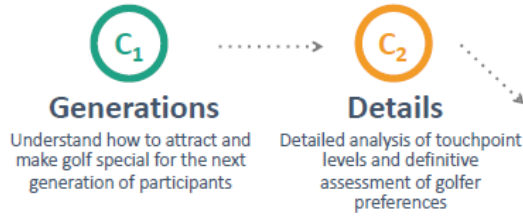
**Longer courses have more scores posted by both men and women; however, the ratio of men/women increases as courses get longer (men post at an increasingly higher frequency than women)**

# The GX Program Roadmap

## Research Stage Visualization

Golfers

Consumers



Facilities

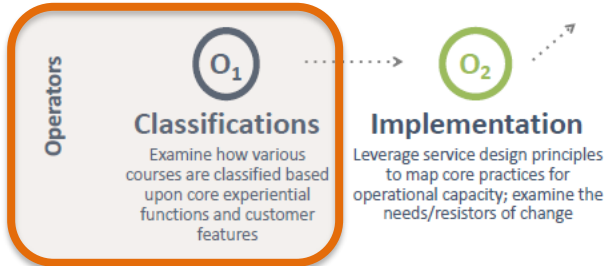
Operators



# Progress to Date

## Research Stage Visualization

Completed in 2019



Finished in 2021



# USGA GX Research Results

- 1) New Framework – GX Based Categories of Courses
- 2) New Secondary Characteristic – Playability Index
- 3) Golfer Satisfaction – Opportunities for improvement

# 1) New Framework: GX Facility Types

- 1) Prestige of facility
- 2) Level of player services
- 3) Level of practice / instruction available
- 4) Golf retail purchase options
- 5) Level of Food & Beverage options / amenities
- 6) Public lodging
- 7) Non-golf activities
- 8) Cost to play



# Golf Course Segmentation

Focused	Enhanced	Comprehensive	Lifestyle	Resort	Destination
<p>A facility driven by the essentials of providing a value-driven place for people to enjoy a round of golf.</p>	<p>A facility that provides an upgraded experience for golfers who want improved golf features and services, including non-golf customer-course interactions.</p>	<p>A facility that provides extensive services and amenities, often at a higher level of quality, that are driven by supporting golf on and away from the course.</p>	<p>A facility that is characterized by providing a range or recreation, social and leisure options for non-golfers in addition to a range of golf-related services.</p>	<p>A facility that is characterized by offering owned or operated lodging options, and a complimentary range of full-service amenities to meet the unique needs of non-residents /visitors who may or may not golf.</p>	<p>An internationally recognized facility that offers a quality golf experience with rates or exclusivity driven by its status, defined as a “bucket list” golf experience by its unique/storied history or known for hosting prominent tournaments.</p>

# Tool to Categorize Golf Courses

## Categorization Tool

1) Do golfers consider you a Top 100 or Bucket List golf course?

a) Yes ==> **Destination**

2) Do you offer lodging to the public?

a) Yes ==> **Resort**

3) Is your facility for golfers only or do you offer non-golf amenities (pool, tennis)

a) Pool / Tennis ==> **Lifestyle**

4) Does your facility offer extensive player services and have multiple F&B options?

a) Yes ==> **Comprehensive**

5) Do players mostly play golf and depart, or do they mostly stay and socialize / eat or drink after playing?

a) Stay ==> **Enhanced**

b) Depart ==> **Focused**

## 2) Further Defining Golf Facilities

### Secondary Classifications

These represent classification options that allow courses to identify an appropriate comparison set based upon important and more traditional methods. These have been updated based upon feedback, with detail explanations provided on the following pages along with exemplar courses within each category.

Management	Access	Holes	Location	Rates	Playability	Length	Quality	Philosophy
Classification method updating the traditional ownership model to address the growth and importance of management structures and emphasis on the customer experience.	Classification method that builds upon golfer access to address the role that hybrid properties have in providing both restrictions and enhancements, and the changing dynamics of course access.	Classification method that focuses on the number of holes as a key differentiator in course operations, while allowing for placement of partial or trend-forward facilities with a range of golf and non-golf operations.	Classification of courses based upon zip code to understand geographic specific options, such as region, cost of living metrics or population density.	Classification of courses based upon the rate charged to play a round of golf, categories for both daily green fees and annual membership fees.	<b>Classification of courses based upon a Playability Metric that places courses into one of five difficulty categories.</b>	Classification of courses by longest tee distance into one of five categories, with distances established by placing 20% of courses into each category.	Classification of courses using objectively collected review data of course quality from non-golf channel related reviews (i.e. Google quality rating on a scale of 1-5).	Classification of service philosophy to indicate the type of service operators provide, a self-identified selection of expected outcomes (not an evaluation of quality levels).

# Facilities want to Provide Difficulty Information to Golfers

After presenting both the **Playability metric** and **Slope value** ranges as an option to address this need, **all** research participants (~80) indicated a **preference for the Playability metric**.

# Potential Playability Characteristic

## Playability

- Classification of courses based upon a Playability Metric that places courses into one of five difficulty categories, ranging from Casual to Expert Plus.





<u>Proposed Category</u>	<u>Bin*</u>
Introductory (Level 1)	Less than 1.0
Straightforward (Level 2)	1.0 – 3.0
Moderate (Level 3)	3.1 – 4.9
Demanding (Level 4)	5.0 – 7.0
Formidable (Level 5)	Greater than 7.0

\* Based on data from the USGA's Course Rating Database



# Potential Recommendation

Below is an outline of potential playability descriptors and symbols to help guide golfers in understanding how difficult a golf course is

<a href="#">Symbol</a>	<a href="#">Course Challenge</a>	<a href="#">Golfer Skill Level</a>	<a href="#">Typical Score</a>	<a href="#">Course Category Label</a>	<a href="#">Brief General Description</a>
	Easiest	Beginner	N/A	Introductory	Wide fairways, few hazards, forgiving
	Easier	Developing	>30 over par	Straightforward	Wide fairways, easy rough, less frequent and challenging hazards
	Average / Typical	Intermediate	20 - 30 over par	Moderate	Standard fairways, rough, hazards and challenge, occasional forced carries
	Harder	Advanced	10 - 20 over par	Demanding	More difficult rough, frequent & challenging hazards, forced carries
	Hardest	Expert	<10 over par	Formidable	Narrow fairways, difficult rough, frequent and long forced carries, penal hazards, unforgiving

# 3) Measuring Golfer Satisfaction

Additional analysis of Phase 1 and 2 research yielded 5 additional areas of focus that drive the golfer's experience at a given facility



# Course Satisfaction: Categories

	Overall	Design	Fairway	Greens/Tees	Pace	Service	Employees	General
Focused	3.98 <sup>a</sup>	3.89 <sup>a</sup>	3.43 <sup>a</sup>	3.75 <sup>a</sup>	3.51 <sup>a</sup>	3.25 <sup>a</sup>	4.07 <sup>a</sup>	3.88 <sup>a</sup>
Enhanced	4.07 <sup>a,b</sup>	4.10 <sup>a</sup>	3.60 <sup>a</sup>	3.93 <sup>a</sup>	3.47 <sup>a</sup>	3.46 <sup>b</sup>	4.09 <sup>a</sup>	3.98 <sup>a</sup>
Comprehensive	4.14 <sup>b</sup>	4.21 <sup>b</sup>	3.85 <sup>b</sup>	4.14 <sup>b</sup>	3.48 <sup>a</sup>	3.68 <sup>c</sup>	4.17 <sup>a</sup>	4.12 <sup>b</sup>
Lifestyle	4.30 <sup>c</sup>	4.21 <sup>b</sup>	3.87 <sup>b</sup>	4.19 <sup>b</sup>	3.66 <sup>b</sup>	3.62 <sup>c</sup>	4.09 <sup>a</sup>	4.17 <sup>b</sup>
<i>Average</i>	<i>4.12</i>	<i>4.12</i>	<i>3.69</i>	<i>4.00</i>	<i>3.52</i>	<i>3.51</i>	<i>4.10</i>	<i>4.04</i>

\*Comparisons are only to be made within columns, and not across entire rows. Numbers reported within each cell represent average score out of 5.

# Course Satisfaction: Specifics

<i>Course Quality Touchpoints</i>	Focused	Enhanced	Comprehensive	Lifestyle
Quality and condition of the fairway (bare spots, damage, etc.)	A*	B*	C*	D*
Quality of tee boxes	A*	B*	C*	D*
Quality and condition of greens (bare spots, ball marks, damage, etc.)	A*	B*	C*	D*
General course cleanliness/upkeep	A*	B*	C*	D*

<i>Pace of Play Touchpoints</i>	Focused	Enhanced	Comprehensive	Lifestyle
Speed of other players on the course (non-playing partners)	A	A	A	B
Pressure to go faster/slow down	A	A	A	B
Length of wait on the course between shots	A*	A	A	B*
Pace of play expectations followed/enforced	A	A	B*	B
Length of wait at the turn	A*	A	A	B
Corrective actions for golfers not following pace standards	A,B,C	B	A,C	A,C

\*Comparisons are only be made within rows, and not across columns.

# GX Solutions

## COURSE UTILIZATION

- How are your golfers utilizing your core product?
- Especially the least satisfied groups: high handicappers, low swing speeds, low accuracy
- What are your golfers' expectations?



## PLAYING CONDITIONS

- Are you using your resources most effectively to improve the areas that have the greatest impact on golfer experience?
- Are you tracking labor, applications, cultural practices, playing performance?



## GOLFER SATISFACTION

- How are you measuring golfer satisfaction?
- How does it compare to your peer group?
- How are the playing conditions impacting satisfaction?





# GHIN GX Survey

