

USGA Green Section Golfer Experience Research Program Review

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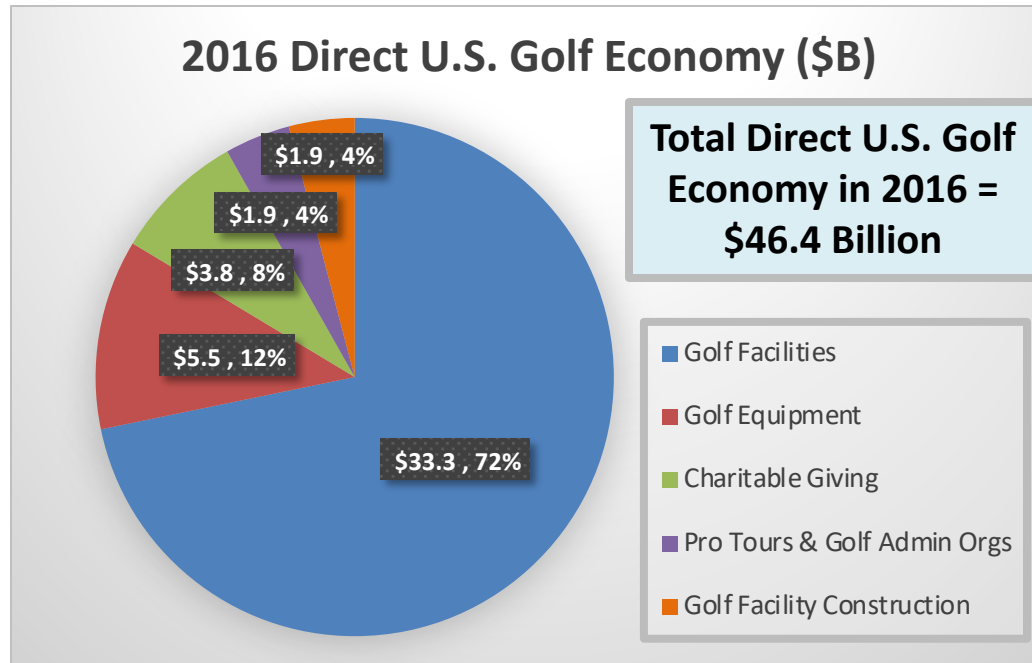
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Outline

- I. Genesis of the GX Research Program
- II. What is the overall roadmap for the program?
- III. What has been completed?
- IV. What have we learned?

Why is this research needed?

Golf facility operations are the largest U.S. golf industry segment accounting for \$33.3 B of revenue in 2016, compared to \$27.0 B in 2006 (2.1% CAGR vs. 1.8% Inflation CAGR).¹

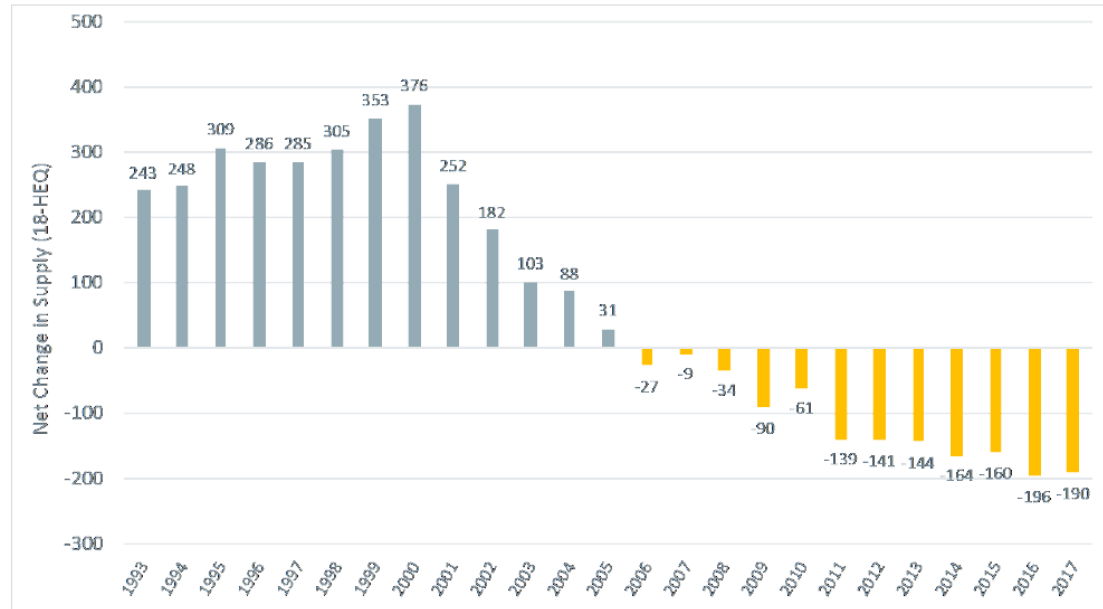


Why is this research needed?

Golf courses have been under pressure since the early 2000's.

- Number of Golfers has been dropping
- Rounds played has been dropping
- More courses have been closing than opening

Net Facility Supply (18+HEQ Closures - Openings), 1993-2017



Golfers are Dissatisfied



Thinking about the typical experience on the golf course you play most often, how satisfied are you with the overall experience?

69/100



Hypothesis

Golfer Satisfaction is the Key to Golfer Retention!!

Regardless of the COVID-19 bounce, the golf industry desperately needs to monitor and improve golfer satisfaction in order to grow demand and improve profitability of facilities.

USGA Response

- In 2017, Dr. Rand Jerris of the USGA issued a challenge to the industry at the 4th North American Golf Innovation Symposium in Vancouver British Columbia

"We will improve golfer satisfaction by 20% while reducing critical resource consumption by 25% by 2025"

<https://www.usga.org/content/usga/home-page/videos/2017/03/07/170307-rsi-symposium-challenge-statement-5350782558001.html>

- Later in 2017, Deloitte proposed a golfer satisfaction study
 - It was expensive and not pursued
- In early 2018, the USGA invited a wide variety of industry experts to a brainstorming workshop at Galloping Hill Golf Course
- Then the work with Professors Eric Brey and Kris Schoonover from University of Wisconsin-Stout began

University of Wisconsin – Stout Program

Research Stage Visualization



What had been completed prior to 2020?

Research Stage Visualization

Completed in 2019



What we learned

While the full program is long-term and detailed, we can begin to roll out useful results

- **Motivators – why do golfers play golf?**

11 Primary Reasons People Play Golf

- Business/professional networking
- Challenge of the game
- Spending time with friends/family
- Competition against other golfers
- Entertainment value/fun experience
- Exercise/physical activity
- Escapism/getting away
- Love of the game
- Prestige/recognition
- Stress reduction
- Visual beauty/spending time outside

What we learned

While the full program is long-term and detailed, we can begin to roll out useful results

- Motivators – why do golfers play golf?
- ***Expectations & Desires – what do golfers want?***

Expectations & Desires of Golfers

- Appropriate behavior
- Course quality
- Employee interaction
- Quality service
- Personal interaction
- Time considerations
- Value proposition
- Golfer Etiquette
- Rules
- Flexibility
- Welcoming
- Technology Escapism
- Course Responsiveness

What we learned

While the full program is long-term and detailed, we can begin to roll out useful results

- Motivators – why do golfers play golf?
- Expectations & Desires – what do golfers want?
- **5 Stages of the Golfer Experience**
 - **Engage:** Touchpoints that occur before a round of golf – encourages golfers to choose a course
 - **Arrive:** Touchpoints that occur when golfers arrive at the course – before they reach the first tee
 - **Golf:** Touchpoints that occur on the course during a round of golf – includes both features and the process of playing
 - **Exit:** Touchpoints that occur when golfers have completed the final hole and are leaving the course
 - **Extend:** Touchpoints that occur when golfers have left the course – meant to engage with the course post-round



What we learned

While the full program is long-term and detailed, we can begin to roll out useful results

- Motivators – why do golfers play golf?
- Expectations & Desires – what do golfers want?
- **5 Stages of the Golfer Experience**
 - >1000 Touchpoints of the Golfer Experience



What we learned

While the full program is long-term and detailed, we can begin to roll out useful results

- Motivators – why do golfers play golf?
- Expectations & Desires – what do golfers want?
- 5 Stages of the Golfer Experience
- ***Focusing on the 77 “Golf” on-course touchpoints***
 - ***11 delighters***

Delighters

- Course challenge
- Fairway width
- Number of bunkers
- Hazard markings
- Hole location
- Green to tee box
- Information concerning pace
- Ranger etiquette
- Customer service quality
- Practice/course consistency
- Wildlife presence

What we learned

While the full program is long-term and detailed, we can begin to roll out useful results

- Motivators – why do golfers play golf?
- Expectations & Desires – what do golfers want?
- 5 Stages of the Golfer Experience
- ***Focusing on the 77 “Golf” on-course touchpoints***
 - ***11 delighters / 12 satisfiers***

Satisfiers

- Balance of shots
- Tee box location
- Green condition
- Starter’s ability to be on time
- Partner’s playing speed
- At-the-turn options
- Location of garbage receptacles
- Cart path quality
- Beverage cart etiquette
- Maintenance etiquette
- Other golfer etiquette
- Course cleanliness

What we learned

While the full program is long-term and detailed, we can begin to roll out useful results

- Motivators – why do golfers play golf?
- Expectations & Desires – what do golfers want?
- 5 Stages of the Golfer Experience
- **Focusing on the 77 “Golf” on-course touchpoints**
 - 11 delighters / 12 satisfiers
 - **7 dissatisfiers**

Dissatisfiers

- Bunker quality
- Ranger placement
- Local rules for playability/speed
- Cart features
- Course Features
- Tee box quality
- Tee box levelness

What we learned

While the full program is long-term and detailed, we can begin to roll out useful results

- Motivators – why do golfers play golf?
- Expectations & Desires – what do golfers want?
- 5 Stages of the Golfer Experience
- **Focusing on the 77 “Golf” on-course touchpoints**
 - 11 delighters / 12 satisfiers
 - 7 dissatisfiers / 8 frustraters
 - **5 Perfect Frustraters**

Frustraters

- **Other’s speed**
- **Corrective actions**
- **Water stations**
- **Emergency facilities/communication**
- **Disability accommodations**
- Balance of shot challenge
- Drop zone identification
- Role of the ranger

What we learned

While the full program is long-term and detailed, we can begin to roll out useful results

- Motivators – why do golfers play golf?
- Expectations & Desires – what do golfers want?
- 5 Stages of the Golfer Experience
- ***Focusing on the 77 “Golf” on-course touchpoints***
 - *11 delighters / 12 satisfiers*
 - *7 dissatisfiers / 8 frustraters*
 - ***13 hybrid touchpoints***

Hybrid Touchpoints

- Walking friendly
- Fairway quality
- Length of course
- Tee options
- Green roll
- Green undulations
- Pace restrictions
- Equitable design
- Rough grass
- Distance
- Green size
- Hole information
- Tee time interval

What we learned

While the full program is long-term and detailed, we can begin to roll out useful results

- Motivators – why do golfers play golf?
- Expectations & Desires – what do golfers want?
- 5 Stages of the Golfer Experience
- ***Focusing on the 77 “Golf” on-course touchpoints***
 - *11 delighters / 12 satisfiers*
 - 7 dissatisfiers / 8 frustraters
 - 13 hybrid touchpoints
 - ***26 on-course touchpoints were not statistically significant***