

Establishing a Golf Course Classification System

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USGA

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CHALLENGE STATEMENT

To reduce golf's consumption of key resources by 25 percent, and improve golfer satisfaction by 20 percent, by 2025, as well as the organization's commitment to lead golf towards a more sustainable future.

This study establishes a comprehensive classification system based upon a golf course's operations, amenities, and golfer experiences. Through the findings, operators can make strategic decisions based on competitors, course playability, and golfer differences.

Executive Summary

Introduction. In response to the USGA's ongoing commitment to improving golfer satisfaction by 20 percent by 2025, this study helps meet this challenge by establishing distinct categories of golf courses, examining golfer differences between courses, and the potential application of a Playability Statistic in assisting courses in communicating their value proposition to players of all levels.

Categories. To understand the range of experiences that courses provide golfers, phase 1 focused on collecting and categorizing insights from 50 golf operators into the different types of courses that exist. This phase focused on differentiating properties based upon the customer experience's scope, primarily the revenue-generating services/features and expense generating departments, to establish the six categories of courses – focused, enhanced, comprehensive, lifestyle, resort, and destination. To determine which grouping a course belonged to, features including practice facilities, golfer support personal, the scope of the pro shop, food and beverage options both in the number of outlets and breadth of offerings, non-golf event space, and the presence of socialization options were examined. The balance between golf and non-golf activities, along with the presence of lodging or status as a globally recognized course, were also considerations for classification. A seventh, non-green grass group, was included to address entertainment facilities and their continued role in growing golf.

Differences. To explore the potential application of course typology, statistical analyses of the golfer satisfaction data collected during the 2018 Golfer Experience Study were conducted. Data from respondents who indicated a home course in their response were further analyzed to understand potential differences based on course type preferences. To efficiently use the initially identified on-course touchpoints, analyses found 28 touchpoints grouped into course design, course quality, play pace, player support, and employee interaction could effectively explain course satisfaction. With 2,920 responses, differences between touchpoint categories were found based upon golfer demographics, behavioral considerations, and opinions about the game. Results indicate significant differences between the golfers who play the various courses, with these differences influencing touchpoints and course operations.

Playability. During the interviewing process, operators indicated a need for secondary categories to clarify course differences further. These secondary categories included management structure, golfer access, number of holes, location, rates, length, perceived quality, and playability. During the analysis phase, USGA researchers determined that data collected during the USGA course rating process known as the Bogie Golf Obstacle Stroke Value could clarify courses' playability. After follow-up interviews, operators were unwaveringly supportive of exploring the playability value and the potential differences between courses. Using USGA data for home courses, the playability value was found to be significantly different between course types. The impact that this value had on a round of golf, and the corresponding satisfaction, was also significant.

Research Stages

Investigation Phases

Golf Operators

The first phase consisted of multiple rounds of interviews with 50 geographically dispersed golf operators from the USGA established geographic regions. These professionals represented different course access types, had a range of facility size and scope of amenities, offered a varied daily rate, and represented different types of ownership structure. Through this initial stage, six-course categories were established – focused, enhanced, comprehensive, lifestyle, resort, and destination – along with the non-green grass entertainment category. A group of secondary classifications - management structure, golfer access, number of holes, location, rates, length, perceived quality, service philosophy and playability – were established to identify potential differences between subsets of courses.

Golfer Experience Survey

The second stage leveraged data from the 2018 Golfer Experience Survey to examine differences between golfers whose home course could be classified into one of the six established categories. Due to the data, only the focused, enhanced, comprehensive and lifestyle courses were examined with differences between 28 representative touchpoints of the on-course experience assessed. The second stage also analyzed playability by reviewing the five categories of playability – casual, moderate, advanced, expert, and expert plus – to understand this value's relationship to course type and customer satisfaction.



Course Typology

Explanation and Outcomes

Phase 1 focused on interviewing golf experts and operators to understand the scope and range of various courses' differences. This phase focused on establishing primary course categories through an iterative interview process and clarifying secondary classification methods by reviewing and revising traditional course classification models. Additional emphasis focused on exploring current and potential playability metrics to communicate what a golfer might expect from a course.

This phase's outcomes included establishing primary course categories – focused, enhanced, comprehensive, lifestyle, resort, destination – while addressing the potential limitations brought on by outlier courses and the growth of non-green grass facilities. Secondary classifications – management structure, access, holes, location, rates, length, perceived quality, service levels, playability - were established, while special emphasis was placed on evaluating potential USGA metrics to represent course playability to golfers.

Methodology

Selection

Industry professionals were selected using a purposeful sampling technique to ensure a balanced group of participants representing five traditional classifications of golf courses – access, facility size, daily rate, ownership and region. Participants represented daily fee, semi-private, private and resort facilities while also including a number of holes ranging from executive/nine to 36 holes.

Courses ranged in the fees they charged from less than \$40, between \$41 and \$120 and more than \$120 per round with a variety of different ownership structures including university, municipal, individual, company, equity and managed. They were regionally diverse with three courses coming from the East Central region, five originating located in the North Atlantic, a total of 10 from the Pacific/Mountain region, seven were from the South Atlantic and 17 from the West Central region. Of the respondents, all had significant experience with eight either in executive positions, owning golf course related business after leaving operations or representing the Professional Golfers Association of America or the National Golf Course Owners Association.

Analysis

The Delphi Method was selected as the most appropriate for data analysis as it allows multiple rounds of interviews, whereas the interviewer interprets initial data and provides a follow-up summary of the results for further discussion. This allows experts to converge towards a “correct” or consensus based upon the insights from other experts. For this study, two rounds of interviews were needed to reach consensus on course classifications, with a final written communication to gather concluding feedback.

Methodology

Initial Interview

Interviews with 50 experts were conducted via telephone throughout the Spring/Summer and took an average of 30 minutes. During the initial interview, respondents were asked their opinions about the effectiveness of current course classification techniques, how they could be adjusted based upon the experience provided to golfers and nongolfers, the role that golf and related activities/experiences play, the role of golf as a secondary amenity, golfer typologies, and how they would handle outliers golf courses. In instances where time allowed, respondents were asked about potential application of this classification method, potential uses of the information and general thoughts about the types of courses that currently exist.

Second Interview

During the second interview, respondents were presented with an initial interpretation of findings in the form of primary and secondary classifications. Primary classifications were based upon the scope of revenue and expense generating services associated with providing customer experiences, while a secondary group of classifications were based upon traditional techniques. Specific focus was given to understanding how to handle outlier scenarios and the potential application of a Playability Metric that was presented by the USGA between the first and second phases. During this second interview, respondents agreed the schema was appropriate with comments refining the core of what was presented or providing further clarity between the various course categories. Given the overwhelming support, with 88% of initial respondents providing feedback, no further interview rounds were needed but an additional opportunity for feedback provided with responses only confirming the results, reminders of important considerations, or no further recommendations provided.

Understanding the Golf Course Universe

Primary Classifications

To establish a system that compares similar courses based upon the scope of customer experiences, the primary classifications allow courses to be compared to similar properties focused on revenue and expense generating services, and the wider scope of amenities presented in these categories. The following slides explain each of these course types in detail.

Focused	Enhanced	Comprehensive	Lifestyle	Resort	Destination
A facility driven by the essentials of providing a value-driven place for people to enjoy a round of golf.	A facility that provides an upgraded experience for golfers who want improved golf features and services, including non-golf customer-course interactions.	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.	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.	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.	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.

FOCUSED

Primary Course Classification

Definition

A facility driven by the essentials of providing a value-driven place for people to enjoy a round of golf.

Characteristics include:

- **Golf Course**

Golf course of varying length and size with minimal golf amenities, potentially a driving range or putting green

- **Golf Shop**

Minimal pro shop to include balls, tees and other on-course essentials supplies

- **Snack Bar**

Snack bar or pre-packaged food/beverage, limited options to include some hot options (i.e., hot dogs)

- **Amenities**

Minimal course amenities or non-golf entertainment offered

- **Events**

Events and activities held in the clubhouse or temporary structures on-site



Example

Antelope Greens Golf Course
Antelope, CA

ENHANCED

Primary Course Classification

Definition

A facility that provides an upgraded experience for golfers who want improved golf features and services, including non-golf customer-course interactions.

Characteristics include:

- **Golf Course - Practice**

Golf course of varying length with driving range and some practice facilities, year-round accessible simulator

- **On-Course Services**

Limited on-course services or amenities, such as a starter and/or marshal with beverage cart service

- **Expanded Golf Shop**

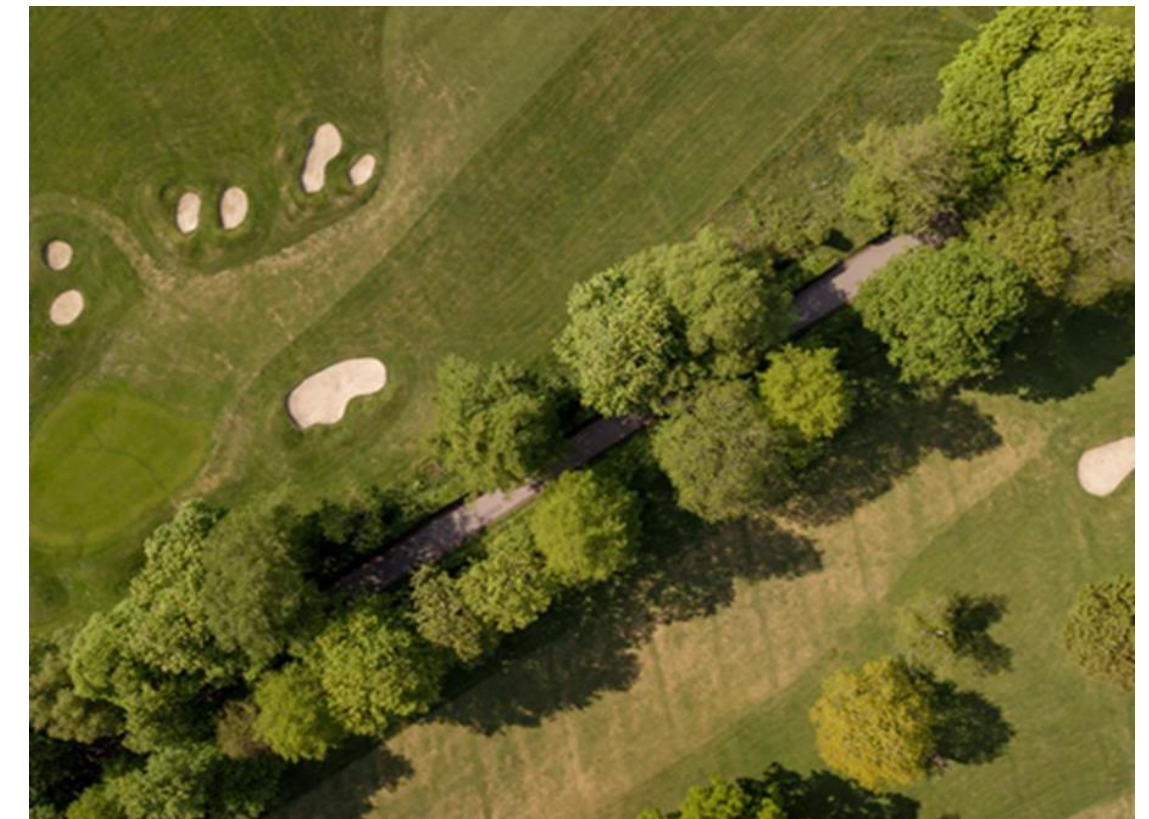
Expanded pro-shop with some non-essential branded offerings, availability of lessons

- **Expanded Food Service**

Restaurant with table service and made-to-order pub food or other expanded food options

- **Non-Golf Events**

Post-round socialization offerings including full bar with multi-purpose areas specifically for non-golf events



Example

The Golf Club at Moffett Field
Mountain View, CA

COMPREHENSIVE

Primary Course Classification

Definition

A facility that provides extensive services and amenities, often at a higher level of quality, that are driven by golf away from and on the course.

Characteristics include:

- **Golf Course – Learning Center**

Course, or courses that include extensive golf facilities and learning center

- **Multiple Food Outlets**

Multiple food outlets with various types and quality level of meals; on-course food and beverage provided

- **Extensive Player Services**

Services to support the golfer experience including player assistants, caddies, pre and/or post round equipment care, and other golf-driven interactions

- **Dedicated Non-Golf Events**

Planned socialization options and non-golf events at full-service facilities

- **Expanded Golf Shop – Extensive Player Development**

Expansive golf shop offerings, opportunities for player development, available golf professionals with extensive lesson offerings



Example

Indian Peaks Golf Course
Lafayette, CO

LIFESTYLE

Primary Course Classification

Definition

A facility that is characterized by providing a range of recreation, social and leisure options for non-golfers in addition to a range of golf-related services.

Characteristics include:

- **Golf Course - Practice**

Presence of course(s), golf amenities and player services (level and range of services may vary)

- **Revenue Streams**

Capacity to generate significant revenue through both golf and non-golf features and amenities

- **Extensive Socialization**

Substantial socialization options associated with and away from golf

- **Social and Recreation Amenities**

Substantial social and recreation amenities to include a combination of at least two of the following: pools, tennis courts, spa, dining, meeting and event space and family-oriented offerings



Example

High Point Country Club
High Point, NC

RESORT

Primary Course Classification

Definition

A facility that is characterized by offering owned or operated lodging options, and a complementary range of full-service amenities to meet the unique needs of non-residents/visitors who may or may not golf.

Characteristics include:

- **Golf Course – Player Services**
Course or multiple courses, golf facilities and player services are present at various levels and quality
- **Extensive Non-golf facilities**
Extensive non-golf facilities provided to support a range of consumer needs and expectations
- **Facility and Amenities**
Facilities and amenities that include price premiums due to the nature of the primary customer (typically a visitor who requires lodging)
- **Enhancements**
Some booking benefits, restrictions, or enhancements for transient guests at owned or operated facilities
- **Lodging**
Includes a range amenities and features associated with lodging-specific properties



Example

Legacy Courses at Cragun's Resort
Brainerd, MN

DESTINATION

Primary Course Classification

Definition

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 being known for hosting prominent tournaments.

Characteristics include:

- **Golf Course**

Represented by both private and public courses, their commonality is not location or size of the property, or even the scope of services, but rather they represent an aspirational golf experience that avid players seek

- **Facility and Amenities**

These internationally recognized, top tier facilities maintain an elevated status in all golfers’ minds, and they charge rates and provide services based upon their status on the need to meet these expectations



Example

Erin Hills
Erin, WI

Understanding the Golf Course Universe

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

Secondary Classifications

Traditional Methods

MANAGEMENT

Classification method updating the traditional ownership model to address the growth and importance of management structures and emphasis on the customer experience.

Traditional techniques categorized courses based upon their ownership structure, which typically includes equity owned (private club), individual owner, company or corporate ownership, and municipality or publicly owned facilities. While ownership is an important consideration, the management of these facilities was identified as a stronger classification methodology due to the impact this has on the customer experience.

All courses are classified in one of the following:

- Board Managed
 - Membership operated, group of owners or equity owned
 - *Milwaukee Country Club, River Hills, WI*
- Owner Operated
 - Traditional single-property owner
 - *Pine Ridge Golf Course, Paris, TX*
- Management Company
 - Owned by any traditional ownership category but reflects the influence that management companies and their wealth of experience and economies of scale have on the golfer experience
 - *Sand Valley, Rome, WI*
- Publicly Owned & Operated
 - Reflects the reality that publicly owned courses, which include municipal, county, Tribal, federal and state, maintain a unique position to implement a unique mission
 - *Kalispel Golf Club, Spokane, WA*

ACCESS

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.

Traditionally, courses have been classified based upon the access they provide to golfers, which includes daily fee, semi-private, private and resort. Given the challenge in defining semi-private and the blurring of access for resort courses, respondents indicated a refresh of categories to reflect the reality of how access impacts the experience.

All courses are classified in one of the following:

- Private
 - Private courses where access is not available to the general public, but rather through exchanges and member-guest programs
 - *White Bear Yacht Club, White Bear Lake, MN*
- Public
 - Daily fee, memberships or frequent/preferred player programs that are open to the public
 - *Torrey Pines Municipal Club, La Jolla, CA*
- Hybrid
 - Include some level of restricted access to the public, or provides enhancement to certain golfers based upon their resort-guest status, combines traditional categories for simplicity while allowing for appropriate segmentation through other qualifiers
 - *Oshkosh Country Club, Oshkosh, WI*

Secondary Classifications

Traditional Methods

HOLES

Classification method focusing 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 attractions.

This classification technique focuses on the number of holes, to include previously used executive and championship course designations. While these additional qualifiers have been used to describe courses, it introduces subjectivity unrelated to the number of holes (i.e., combining holes with the course's scope or nature), and respondents indicated this as an ongoing concern. An additional qualifier classification is also provided to assist courses with a number of holes unrelated to the traditional block nine identifier and offer trend-forward offerings. This allows for self-identification based upon where a course sees itself competing. For instance, if a course has nine holes but an additional practice area with three holes and mini-golf, a course can place itself into the correct category based upon the level of upkeep and work to maintain their various holes.

All courses are classified in one of the following:

- 9 holes
 - *Mill Valley Municipal Golf Course, Mill Valley, CA*
- 18 holes
 - *Chambers Bay, University Place, WA*
- 27 holes
 - *Kierland Golf Club, Scottsdale, AZ*
- 36+ holes
 - *Pinehurst Golf, Pinehurst, NC*
- Non-traditional Profile
 - This option is provided for courses who have a series of traditional holes, or multiple setups, but has such a unique offering that comparing themselves to other, more traditional courses, is not appropriate
 - *Toad Valley, Pleasant Valley, IA*

LOCATION

Classification of courses based upon zip code provides an understanding of geographically specific differentiators, such as region, cost of living metrics or population density.

Course location has always been an important consideration in understanding operations, customers, and ultimately determining an appropriate comparative set. Unlike other qualifiers where limited categories exist, zip code data allows for a substantial collection and application of data, especially as it relates to residents and their proximity to the course.

Eagle Valley Golf Club, Woodbury, MN

Classified by one of the following:

- | | |
|----------------------|-----------------------------------|
| • Region | West Northcentral |
| • State | Minnesota |
| • Population Density | Suburban |
| • Cost of Living | 81.15 (COLI) |
| • Resident Income | \$108,539 |
| • Demographics | 76.5% White, non-Hispanic |
| • Proximity miles | Eight golf courses within 6 miles |

Secondary Classifications

Traditional Methods

RATES & FEES

Classification of courses based upon the rate charged to play a round of golf, categories for both daily green fees and annual membership fees are established.

Rate charged can be an indicator from both a supply and demand perspective, including operational costs, scope of experience, course quality, and a representation of a club's perceived status. To ensure both types of courses, membership and daily fee, can be appropriately categorized, respondents indicated two-sets of classifications are needed. To ensure appropriate comparisons can be made, daily rates are listed for 18-hole equivalencies, and membership fees focus on the annual fee.

All courses are classified in one of the following:

DAILY FEE RATES

- **Less than \$40**
 - *Hartford Golf Club, Hartford, WI*
- **\$40 - \$70**
 - *Washington Country Golf Course, Hartford, WI*
- **\$71 - \$100**
 - *The Golf Courses of Lawsonia, Green Lake, WI*
- **\$101 - \$150**
 - *SentryWorld, Stevens Point, WI*
- **\$150+**
 - *Erin Hills, Erin, WI*

ANNUAL MEMBERSHIP FEE

- Less than \$1,000
- \$1,000 - \$2,499
- \$2,500 - \$4,999
- \$5,000 - \$9,999
- \$10,000 - \$15,000
- Over \$15,000

Secondary Classifications

Traditional Methods

PERCEIVED QUALITY

Classification of courses using objectively collected consumer review data of course quality from non-golf channel related reviews (i.e., Google quality rating on a scale of 1 - 5).

One of the most significant challenges to establishing the quality of courses is the source of information used to determine the level. Quality is not a static opinion, with consumer opinions and perceptions creating a substantial variance in the assessment. This variability makes it extremely challenging to determine quality, even for a particular course. While the USGA does collect data through their agronomy consulting services, there is no universal course rating system that addresses the role that non-golf touchpoints serve in quality evaluations. To address the need for rating inclusion, the quality rating is represented by a perceived number from publicly available reviews to allay respondent's concerns over data variability. While this data is based upon perceptions, and respondents indicated potential validity concerns, it is reliable, and using Google Reviews is seen as a viable option. Unlike booking engine reviews, where adversity may cause negative reviews due to the nature of the relationship between the three parties (booking engine, golfer, course), Google offers a relatively stable system for assessing perceived quality.

All courses are classified in one of the following (based upon a 5-point scale):

- Below 4.2
 - *Bent Creek Golf Course, Gatlinburg, TN*
- Between 4.2 and 4.6
 - *Brown County Municipal Golf Course, Green Bay, WI*
- Greater than 4.6
 - *New Richmond Golf Club, New Richmond, WI*

LENGTH

Classification of back-tee distance by placing courses into one of five categories, with distances established by placing approximately 20% of courses into each category.

Distance is an objective tool to measure differences between courses – both in how the customer sees a course (i.e., Championship-length course versus short course) and potential costs associated with operating a course (i.e., increased length would indicate increased costs associated with an expanded footprint). Current categories of size are varied and based upon traditional or casual delineations. Using data from this study, yardage categories were established to create five relatively equal groupings where each grouping represents 20% of the total sample. For simplicity of implementation, distances were rounded with original numbers presented in parentheses.

All courses are classified in one of the following (with all courses being classified as Comprehensive golf courses):

- Less than 6,300 (6,348)
 - *Country Club of Billerica, Billerica, MA* 5798
 - *Bucks County Country Club, Jamison PA* 6044
- 6,300 – 6,600 (6,626)
 - *Golf Course of Glen Mills, Glen Mills, PA* 6352
 - *Glendoveer Golf & Tennis, Portland, OR* 6570
- 6,601 – 6,800 (6,870)
 - *Pine Hills Golf Club, Plymouth, MA* 6748
 - *Shadow Hills Golf Club, Indio, CA* 6774
- 6,801 - 7,000 (7,048)
 - *St. Andrews Golf and CC, Chicago, IL* 6920
 - *Spencer T Olin Golf Course, Easts Alton, IL* 6963
- More than 7,000 yards
 - *Golden Eagle Golf Club, Brainerd, MN* 7014
 - *Oakland University Golf, Rochester, MI* 7234

Secondary Classifications

Traditional Methods

SERVICE PHILOSOPHY

Classification of service philosophy to indicate the type of service a course can be expected to provide, a self-identified selection of expected outcomes and not an evaluation of quality levels.

Much like the quality of courses, determining service levels at a course has unique challenges. Various tools, methods, and scales have been devised, along with a myriad of analysis techniques, to determine service quality. While these tools and methods have validity, determining service quality for categorization purposes presents unique challenges associated with cost and resource limitations. Additionally, much like overall quality, it would not be appropriate for the USGA to determine service quality levels for courses. To address the need to include service quality, respondents favorably viewed focusing on service philosophy based upon Maslow's Hierarchy of Needs to establish differences based between courses based upon how they viewed service delivery.

All courses are classified in one of the following :

- **Meets Expectations:**
 - Course answers inquiries and satisfactorily meets those requests; focus is on a friendly staff who takes care of the customers' needs
- **Meets Desires:**
 - Proactively addresses expectations of customers by recognizing needs before the customer knows they are there; some level of customer data collection (survey) and formal employee training to communicate changing customer expectations
- **Meets Unrecognized Needs:**
 - Anticipates what the customer wants through regular data collection, analysis and targeted interactions; extensively uses analytics and data to increase service levels while providing regular, formalized training

SERVICE LEVEL QUESTIONNAIRE

To ensure courses are appropriately identified, as respondents indicated an industry tendency to over assess the level of service provided to customers, a short survey tool should be established to correctly identify an appropriate category for each course. Below is a sample of questions that could be included:

- Do you hold, conduct a complete orientation program for each new hire?
Yes No
- Do you hold, conduct all staff training (annually) to empower all team members to be brand advocates? Yes No
- Do you specifically allocate dollars of your annual budget to be spend for all employee training and customer experience? *These include examples such as attending professional conference or seminars and paid instruction provided by outside agencies, as well as in-house training activities.* Yes No
- Does each department at your facility have a set of credos (beliefs, values) provided and implemented? *For example, Golf Shop "Provide an efficient and seamless guest experience ending with a smile and an invitation to return", Turfgrass "Provide consistent championship caliber playing conditions"* Yes No
- Do you have Customer Relationship Management (CRM) software to gather golfer data? *These include emails, address, tee time preferred, buying pattern, and food and beverage options.* Yes No
- Do you engage with customers after using your facility through survey feedback? Yes No
- Do you build customer profiles on each guest? Yes No
- On a scale of 1-5, how do you rate your brand (facility) in providing differentiating service? 1 2 3 4 5
- On a scale of 1-5, what is your level of providing an elevated experience? 1 2 3 4 5

Secondary Classifications

Traditional Methods

PLAYABILITY

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

Throughout the research process, respondents indicated a universal expectation that playability is part of the categorization schema. A golf course is set up and maintained impacts how it is played, and therefore impacts the customer's experience and course operations. After presenting both the Bogie Golf Obstacle Stroke Value ranges (playability metric) and Slope value ranges as an option to address this need, all research participants indicated a preference for the playability metric. The term metric could easily be interchanged with statistic, number, or value, but has is presented as a metric given what it represents – a metric to understand playability.

Classified by one of the following:

<u>Descriptive (Difficulty Level)</u>	<u>Playability Metric</u>
• Casual (Level 1)	Less than 1.0
• <i>Ironwood Golf Course, Cowlesville, NY</i>	.60
• Moderate (Level 2)	1.0 – 3.0
• <i>Lake Hills Golf Course, Billings, MT</i>	1.66
• Advanced (Level 3)	3.1 – 4.9
• <i>Golf Courses of Lawsonia, Green Lake, WI</i>	4.42
• Expert (Level 4)	5.0 – 7.0
• <i>Mirasol Country Club, Palm Beach, FL</i>	6.31
• Expert + (Level 5)	Greater than 7.0
• <i>Morongo Golf Club, Beaumont, CA</i>	7.70

Level	Metric
Casual (Level 1)	Less than 1.0
Moderate (Level 2)	1.0 – 3.0
Advanced (Level 3)	3.1 – 4.9
Expert (Level 4)	5.0 – 7.0
Expert + (Level 5)	Greater than 7.0

Playability

Respondent Support

Qualitative Support. Support for the development, and further use of the Playability Metric, was universal over Slope. Playability was seen "as the way to go because of its ease of use," "playability is probably the way to go all things considered," and this is how "we talk about golf at our course." While individual nuances existed as to specific reasoning, respondents fit into one of two categories: broad optimism for what this classification provides operators and golfers alike and caveat optimism. Respondents wanted to ensure that both industry and golfers' education be included if this information were to be widely used.

Cautious supporters' thoughts ranged from "playability has a learning curve" and "playability would be great if you educate enough" to "playability is better once it is defined and marketed" and "there needs to be a clear reason so to why it is being introduced." When introducing the playability metric, greater insights and reasoning into its application and logic were seen as necessary, even as some respondents indicated "change it tomorrow (from slope to playability)." The playability metric was seen more favorably for a variety of reasons, including:

- Slope has a considerable level of irrelevancy for many golfers and some operators; they know it as a benchmark
- Slope is tied to Handicap and tee boxes, and this is not something that the majority of average golfers maintain or use to determine which course to play
- Difficulty in not only understanding what Slope means but, more importantly, communicating this value to the average golfer
- Confusion was a theme concerning Slope, from all levels and types of courses, which is why playability was seen so favorably
- Slope has a comprehensiveness to it, and while that is an important consideration, the difficulty in applying it was a limiting factor

Respondents indicated that "slope is too much" and "slope is challenging because it is so variable" even though it might be "a good short-term solution" and that "traditionalists would prefer this metric." Furthermore, the playability metric provided substantial upside in the opinion of participants, including:

- Playability, and the presented categories, are new and straightforward and could be leveraged to renew interest in the work of the USGA
- By providing a specific value, courses could use this to communicate their value proposition to golfers while golfers would be able to understand this value better in selecting courses
- The titles of the difficulty levels are more important than the numbers for golfers; the number is more operationally critical (this was a meaningful conversation that continued through email with several respondents to ensure the titles reflected the extremes presented in the categories)
- Playability is more distance agnostic and focuses on communicating a more straight forward and understandable assessment of the course

Secondary Classifications

Traditional Methods

Management Structure	Access	Holes	Location	Perceived Quality
<i>Ownership model on management structures and emphasis on the customer experience.</i>	<i>Golfer access that hybrid properties have in providing both restrictions and enhancements, and the changing dynamics of course access.</i>	<i>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 attractions.</i>	<i>Based upon zip code allows us to understand geographically specific differentiators, such as region, cost of living metrics or populations density.</i>	<i>Using objectively collected consumer review data of course quality from non-golf channel related reviews (i.e., Google quality rating on a scale of 1 - 5).</i>
Board Managed	Private	9 Holes	Region State	Below 4.2 rating
Owner Operated	Public	18 Holes	Population Density Rural, Urban, Suburban	4.2 – 4.6
Management Company	Hybrid (some level of restricted access)	27 Holes	Cost of Living	Greater than 4.6
Publicly Owned & Operated		36+ Holes	Resident Income	
		Non-Traditional Profile (short, partial course)	Demographics	
			Proximity Distance to determine regional competitors	

Secondary Classifications

Traditional Methods

Rates - Daily 18 hole equivalencies	Rates – Annually Membership	Difficulty Levels	Playability Index	Length (yards)
<i>Rate charged to play a round of golf, categories for daily green fees.</i>	<i>Rate charged to play a round of golf, categories for annual membership fees.</i>	<i>Classification of courses based upon a Playability Metric that places courses into one of five difficulty categories, ranging from Casual to Expert Plus.</i>	<i>Classification of courses based upon a Playability Metric that places courses into one of five difficulty categories, ranging from 0 to greater than 7.</i>	<i>Longest tee distance into one of five categories, with distances established by placing 20% of courses into each category.</i>
Less than \$40	Less than \$1000	Casual (Level 1)	Less than 1.0	Less than 6,000 yards
\$40 - \$170	\$1000 - \$2,499	Moderate (Level 2)	1.0 – 3.0	6,000 – 6,299
\$71 - \$100	\$2,500 - \$4,999	Advanced (Level 3)	3.1 – 4.9	6,300 – 6,799
\$101 - \$150	\$5,000 - \$9,999	Expert (Level 4)	5.0 – 7.0	6,800 – 6,999
\$150+	\$10,000 - \$15,000	Expert Plus (Level 5)	Greater than 7.0	Over 7,000 yards
	Over \$15,000			

Sample Course Profile

ENHANCED

Primary Course Classification with Secondary Qualifier Differences



Brown County and New Richmond Golf Course are both categorized as **Enhanced** golf courses as both have a golf course with varying length, separate driving range and options in practices facilities. Both offer on-course services with expanded golf shop and lessons. Brown County Golf Course and New Richmond Golf Course have table service and made-to-order food in addition to specific golf activities and non-golf events.



Brown County Municipal Golf Course

Daily fee, owned and operated by Brown County, located 10 miles outside of Green Bay, WI. Established in 1958, 18-hole par 72 facility hosting both men's and women's state tournaments.

New Richmond Golf Course

Daily fee, owned and operated by single owner, located 30 miles northeast of St. Paul, MN. Old Course 18-hole par 72 with additional Links Course with reversible 9-hole par 36.

Secondary Qualifier Differences

Golf Course	Management	Access	Holes	Location	Rates	Playability	Length	Quality	Philosophy
Brown Country	Municipal	Public	18 holes	54155	\$50/riding Wkday	Advanced	6804	4.4	TBD
New Richmond	Single Owner	Hybrid	27 holes	54017	\$61/riding Wkday	Advanced	6688	4.7	TBD

Sample Course Profile

COMPREHENSIVE

Primary Course Classification with Secondary Qualifier Differences



Eagle Valley Golf Course and Golden Eagle Golf Club are categorized both as **Comprehensive** golf courses with extensive player assistance and dedicated PGA professional staff. Both offer on course services with expanded golf shop and lessons. Eagle Valley and Golden Eagle have multiple food outlets and various options in food and beverage, including meeting and banquet offerings. Both offer specific programming for juniors, men and women program for golf and non-golf events. Member discounts and advance reservation booking are awarded.



Eagle Valley Golf Course

Daily fee, owned and operated by City of Woodbury, MN located 30 miles east of Minneapolis. Course that will test all skills levels with 18-hole par 72 facility and with one of the state's largest practice area. Memberships are offered in city resident golf passes and range members.

Golden Eagle Golf Club

Daily fee, owned and operated by SVN Management Company in Brainerd, MN, located 125 miles north of Minneapolis. Old Course 18-hole par 72 with multiple combination of tees for 18-hole par 71. Membership is offered in seasonal, junior and range.

Secondary Qualifier Differences

Golf Course	Management	Access	Holes	Location	Rates	Playability	Length	Quality	Philosophy
Eagle Valley	Municipal	Public	18 holes	Suburban	\$52/riding Wkday	Moderate	6910	4.2	TBA
Golden Eagle	Management Company	Hybrid	18 holes	Rural	\$65/riding Wkday	Advanced	7014	4.7	TBA

Excluded Classification

Assumptions and Limitations

Entertainment Properties

Given the growth that non-green grass facilities continue to play in the world of golf, a final group of venues, entertainment, was also discussed as an increasingly important part of golf. These facilities do not have an operational golf course but still cater to golfers' needs by providing golf-themed entertainment, virtual experiences, or player development options away from a course. These are non-green grass facilities but have emerged as an essential type of facility to support the golfer's growing and diverse needs. As respondents of this research indicated, these venues do and will continue to play an essential role in golf. They are not necessarily classified as courses due to their unique nature and were not part of this analysis.

Unique Considerations

While every attempt has been made to objectively categorize courses based upon the scope of customer experience, underlying assumptions and different reasoning in developing these categories needs explanation. Based upon an increase in customer touchpoints as you move through the categories, there is an expectation of increased operational complexity, varying staffing levels to include managerial expertise within various departments, more expenses related to the physical structures and size, further employee specialization, increased support for both paid and volunteer positions, and elevated customer expectations given the increase in touchpoints and services. While rate or per round equivalency, quality of the facilities, levels of course maintenance, competition focus, range and scope of golf-related activities/events, technological adoption, increased tee time interval to support the speed of play, and the challenge of the course may also increase, these assumptions are excluded given the prevalence of courses and customers that do not subscribe to these set expectations. Family friendliness or family-driven amenities, which continues to grow in importance, are not included in the consideration as courses at all levels can be family-friendly. While every effort has been made to be inclusive in developing this classification, there will always be outliers that represent consequential course types within the ecosystem that cannot easily be classified (i.e., university courses, real estate development anchors) due to their unique nature.

Course Differences

Explanation and Outcomes

Phase 2 focused on **applying the established primary categories** to understand potential differences in the type of customer that each course attracts. Due to the secondary nature of the data used during the analysis, only focused, enhanced, comprehensive and lifestyle courses were available for analysis. To explore potential use of the Playability Metric, further analyses examined potential differences between courses as compared to the metric, and the impact that different categories of playability had on the golfer.

Outcomes of this phase includes application of the modified Course Satisfaction Scale that streamlines results of the 2018 Golfer Experience Study by reducing the number of touchpoints from **77 to 28**, to represent five categories: course design, course quality, pace of play, player support, and employee interaction. Using these touchpoints, differences and similarities were identified across course typologies. To support application of the Playability Metric and understand potential influence, differences between courses and general impacts playability has on golfers.

Methodology

Data for this phase of analysis came from the 2018 Golfer Experience Study supported and funded by the USGA. Information was collected by contacting a randomized sample of USGA members by distributing a link within a handicap revision email to ensure a breadth of members were approached from across the United States. There were 1,626 member responses. Data was also collected from a randomized sample of Billy Casper Golf members to increase the depth of golfer types and experiences included in the final sample. A survey link was distributed by Billy Casper Golf and collected 4,101 member responses.

Verification of data occurred in multiple phases and was finalized after the initial round of data collection. Statistical tests were run to verify item appropriateness and reduce the number of items to limit multicollinearity. Post survey verification mirrored previous statistical tests to ensure fit with adjustments made to the system's functionality.

Course data to understand differences between course types and explore the playability metric's potential use, responses from the initial survey were analyzed for a home course designation. Respondents were included when the course website could be identified to establish a course typology and the playability metric identified via the USGA. A coding key was established to ensure course identification validity, and courses that bordered multiple categories were assessed by the team, with any discrepancies discussed and finalized.

Analysis to examine potential differences between course types started with factor analysis applied to the initial 77 on-course touchpoints of the 2018 Golfer Experience Study. This allowed a substantial amount of golfer satisfaction to be explained by 28 representative variables. Correlation and analyses of variance were then conducted on these factors, along with demographic and other explanatory variables, to determine this sample's differences. Courses were then classified based upon their playability metric to explore potential similarities and differences between courses to understand impacts on overall satisfaction and how course designations impacted outcomes.

DATA

2018 Golfer Experience Study collected responses and home course information.

VERIFICATION

Multiple tests applied to verify appropriateness and limit multicollinearity.

COURSE DATA

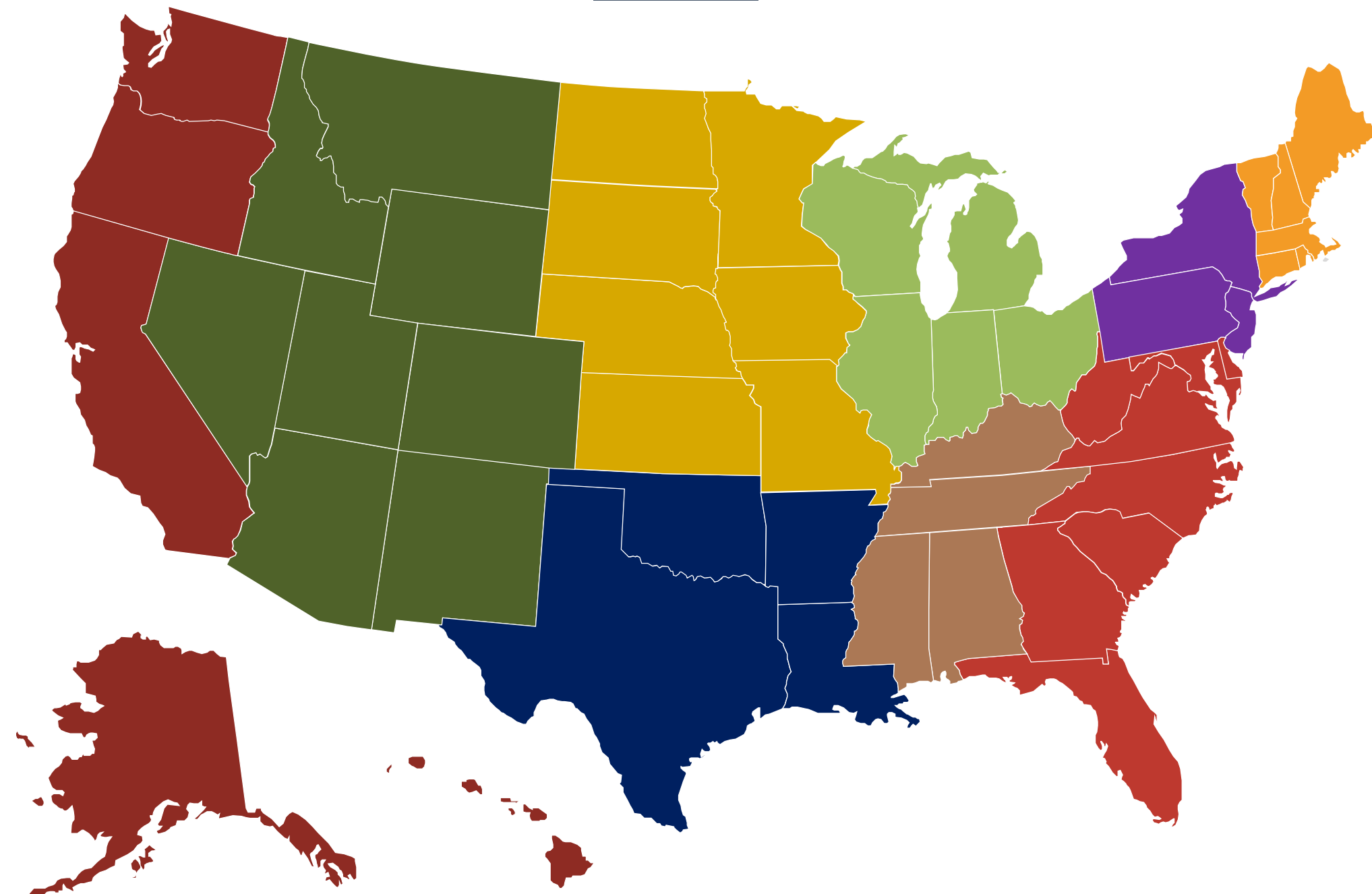
USGA playability metric with corresponding respondents course data.

ANALYSIS

Examined similarity and differences between courses and golfers.

Golfer Geography

Regional breakdown of survey respondents



Pacific
319 respondents
10.8% of total sample

Mountain
53 respondents
1.8% of total sample

West South Central
28 respondents
1% of total sample

New England
190 respondents
6.5% of total sample

Middle Atlantic
525 respondents
17.8% of total sample

South Atlantic
844 respondents
28.7% of total sample

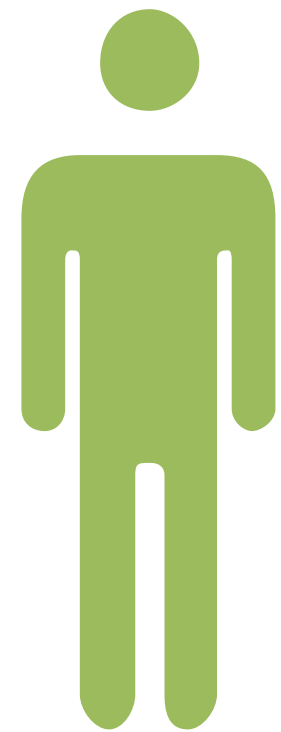
West North Central
68 respondents
2.3% of total sample

East South Central
70 respondents
2.4% of total sample

East North Central
823 respondents
27.9% of total sample

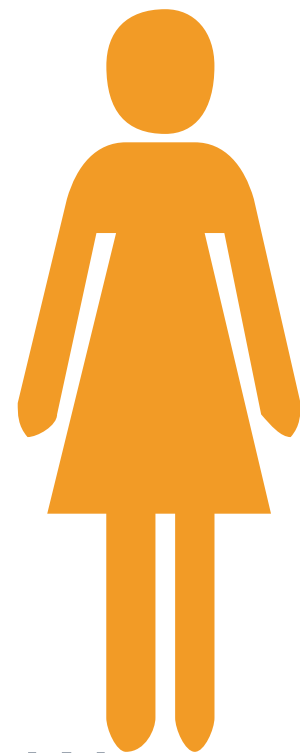
Golfer Demographics

What our sample looks like



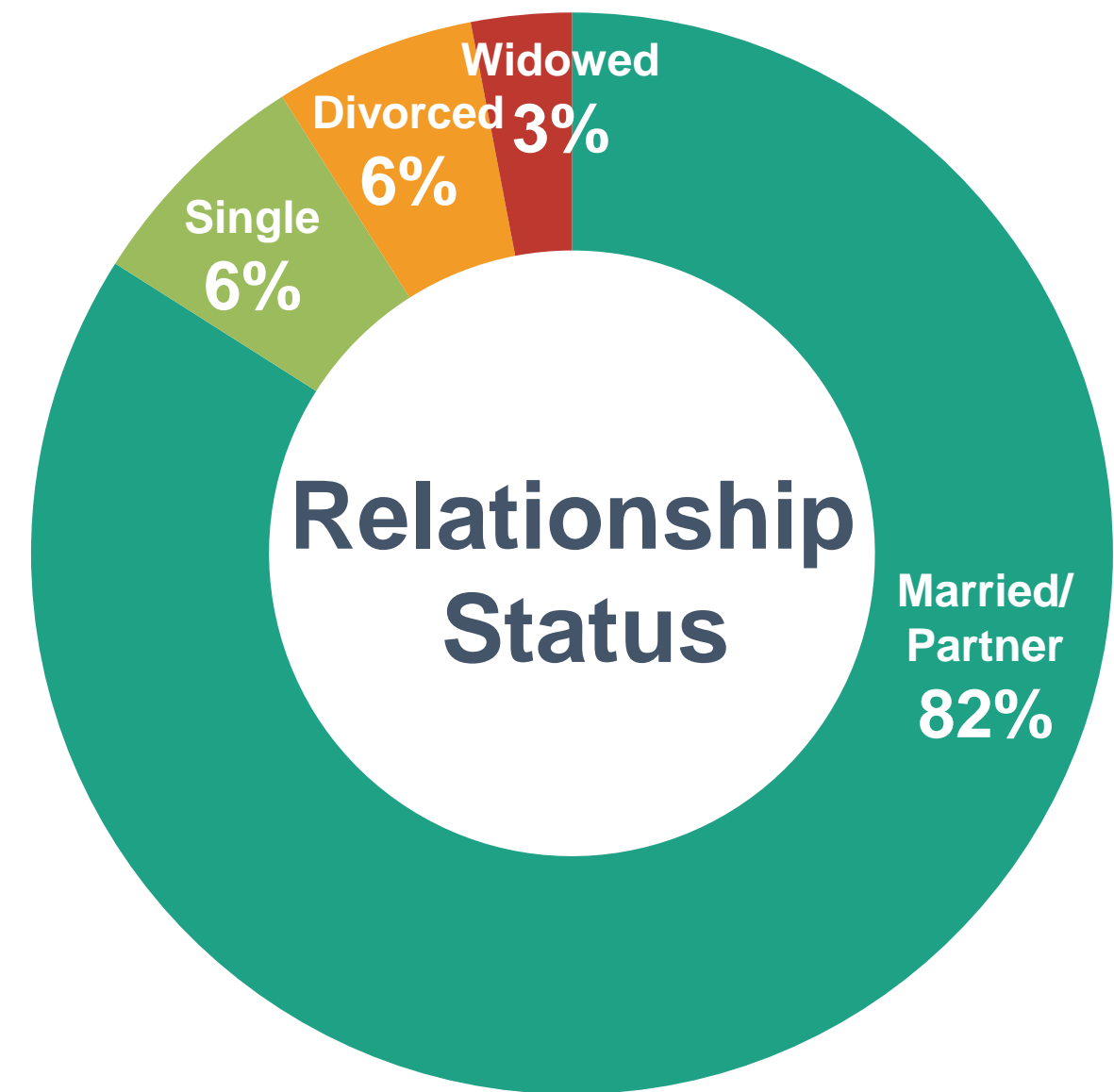
Men

91%



Women

9%



* Preferred not to answer represented 3%.

White or Caucasian

89%

Less than 7% represent brown and black communities of respondents; 4.6% reported not to self-select.

Children

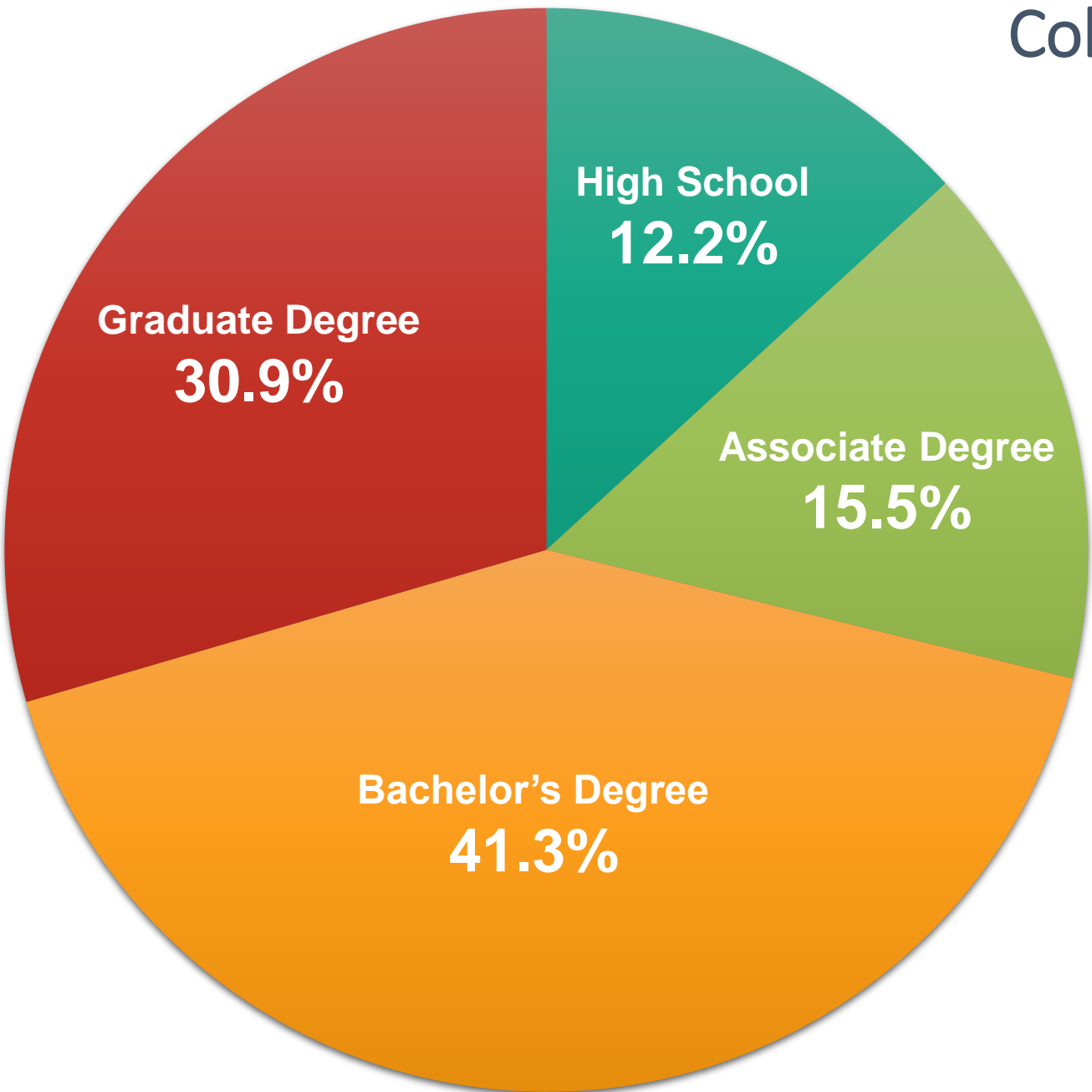
2

The average respondent had 2 children in their household, with as many as 5 children reported.

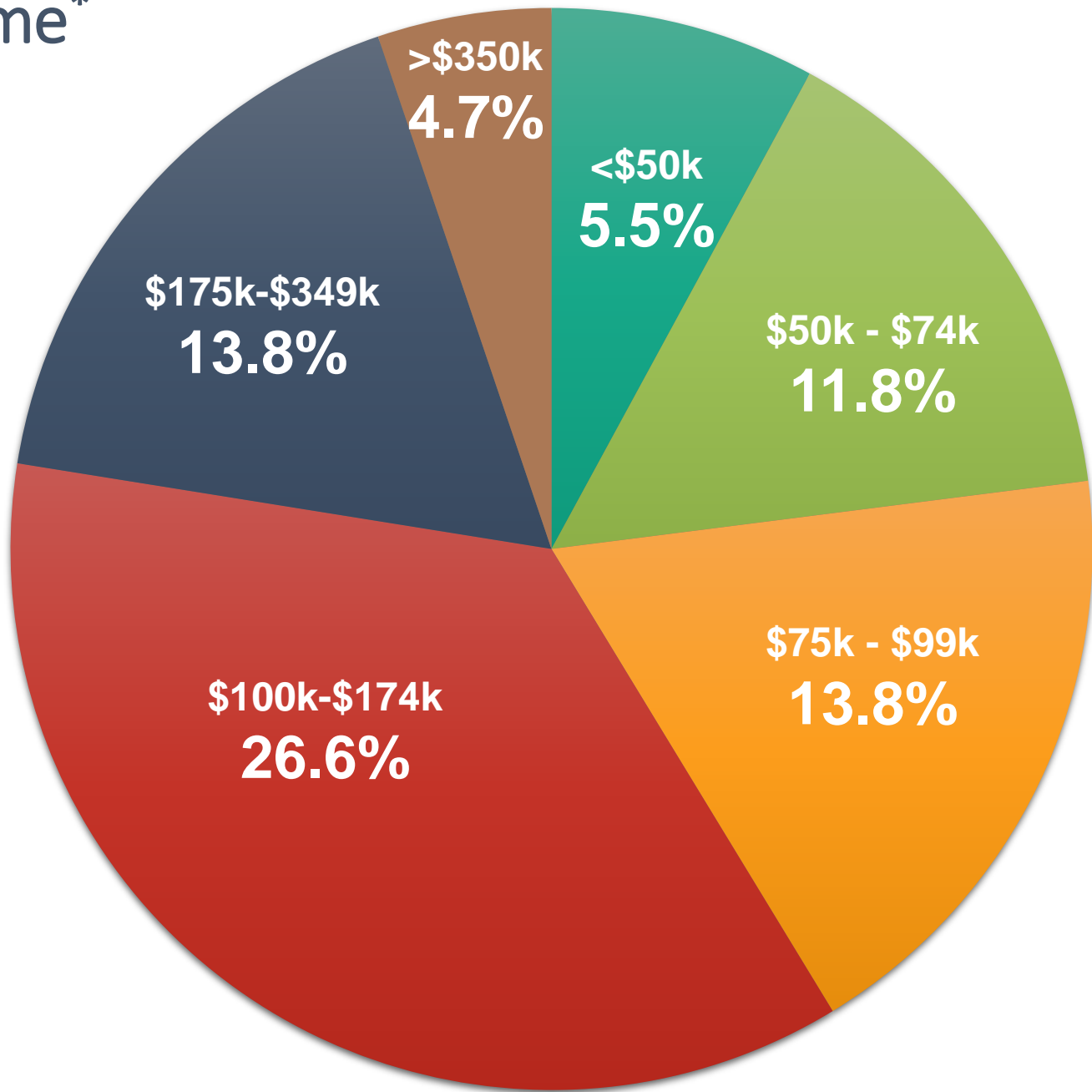
Golfer Demographics

What our sample looks like

College*



Income*



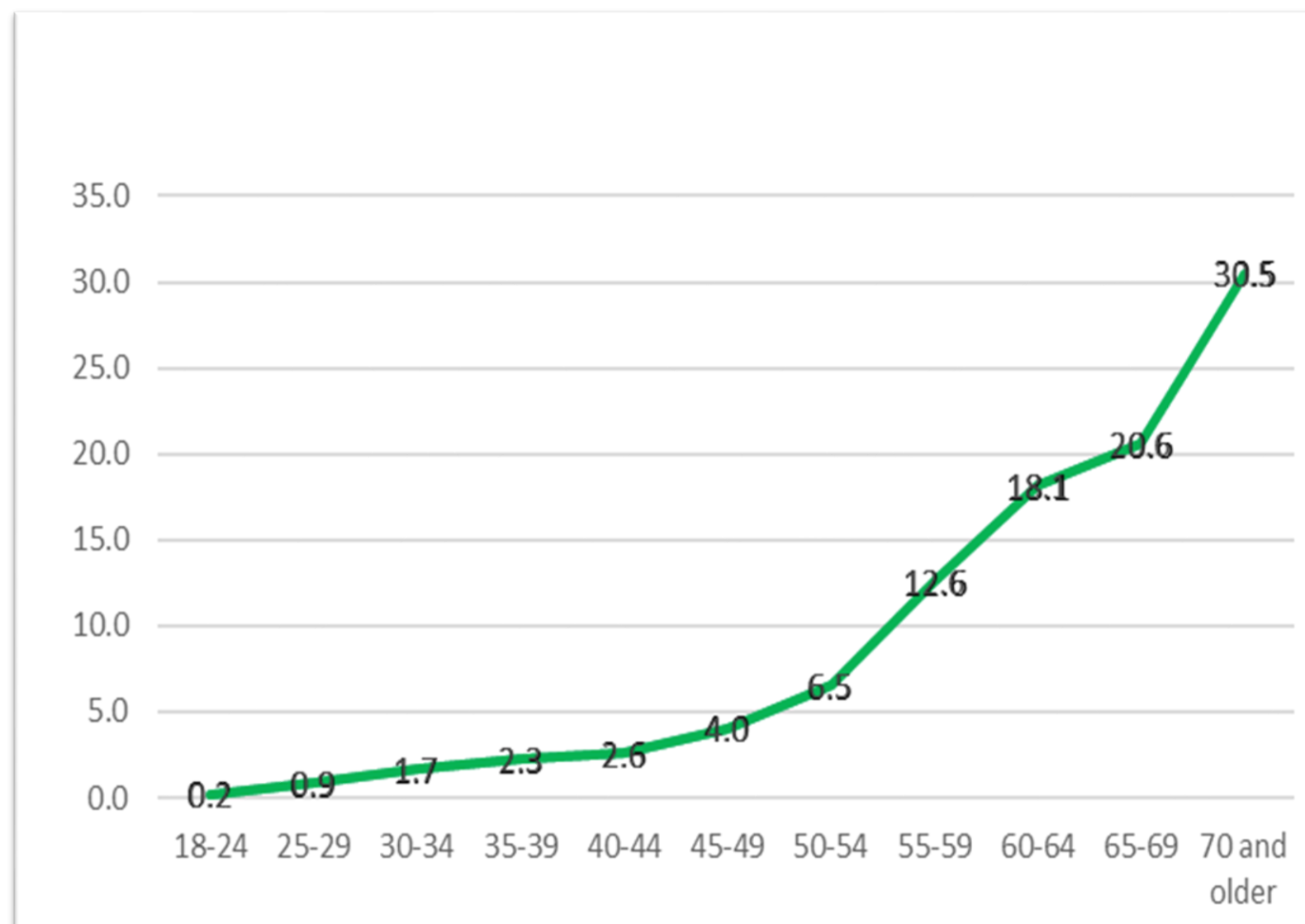
*Not shown in the charts above are the fact that less than 1% of respondents did not finish high school and with a minimal number of respondent households making less than \$30,000 annually, they were combined with the <\$50k group. Respondents did not self report income equaled 23.8%

Golfer Demographics

What our sample looks like

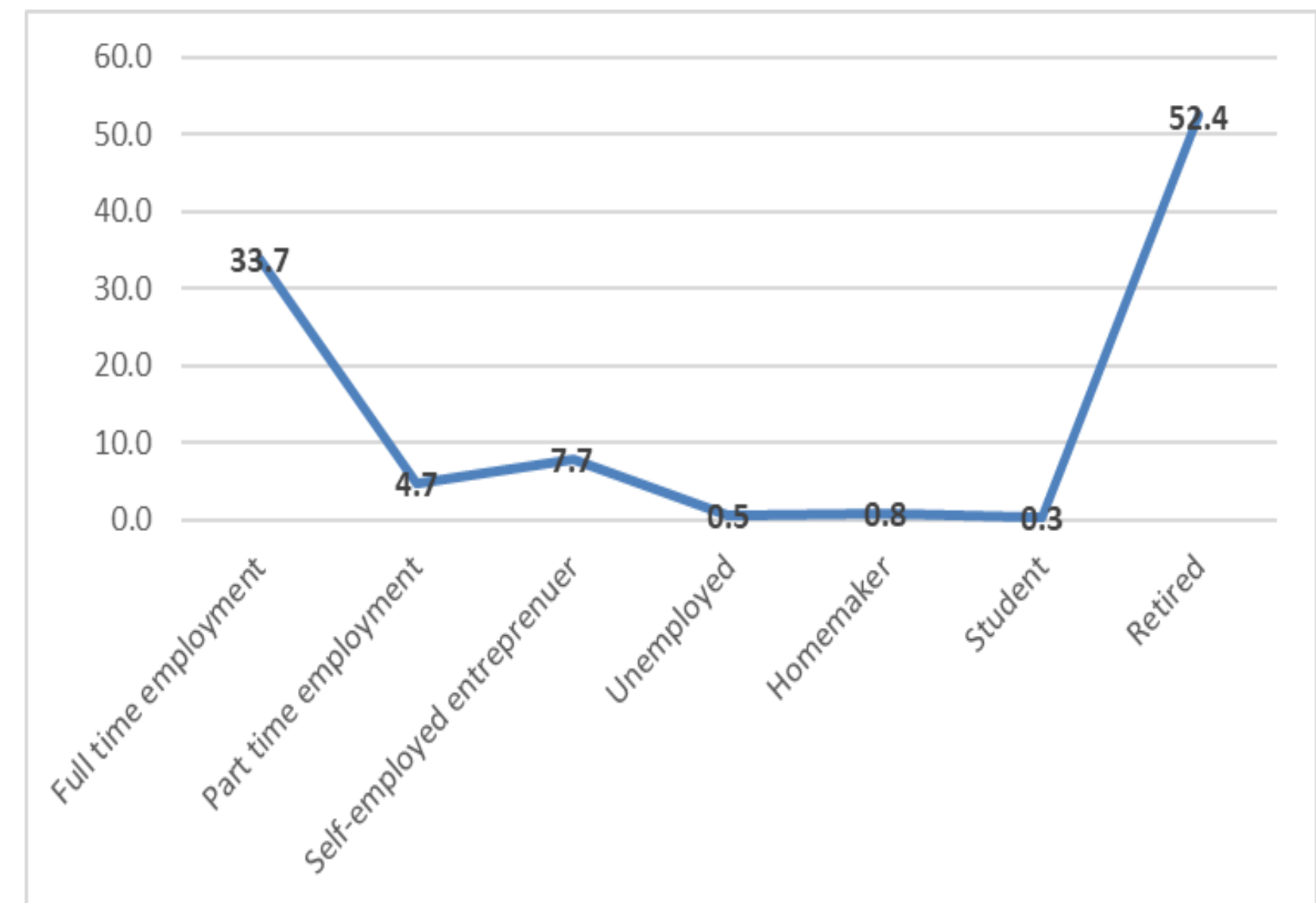
Age

Our sample was primarily older with more than 50% of respondents indicating an age of 60 or greater.



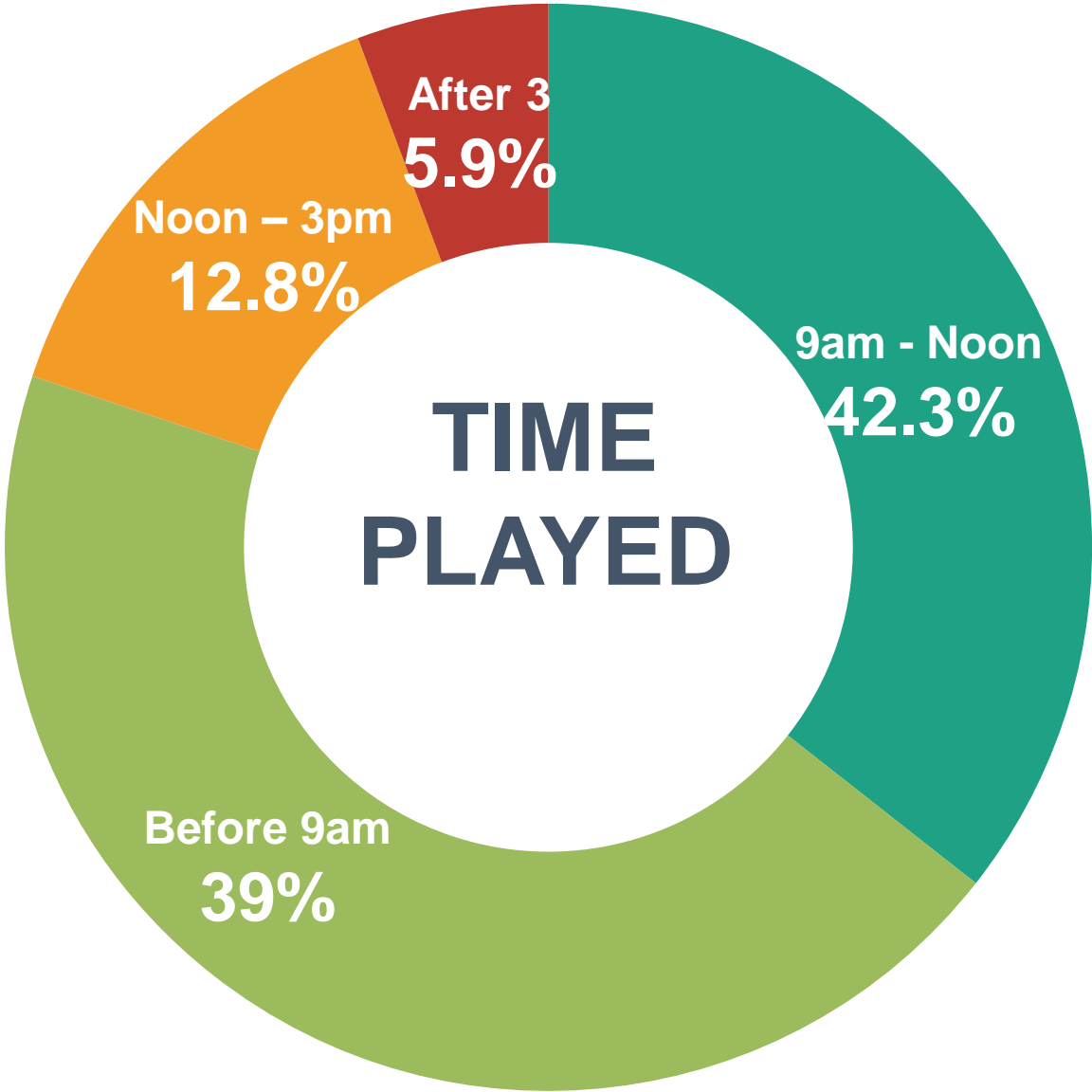
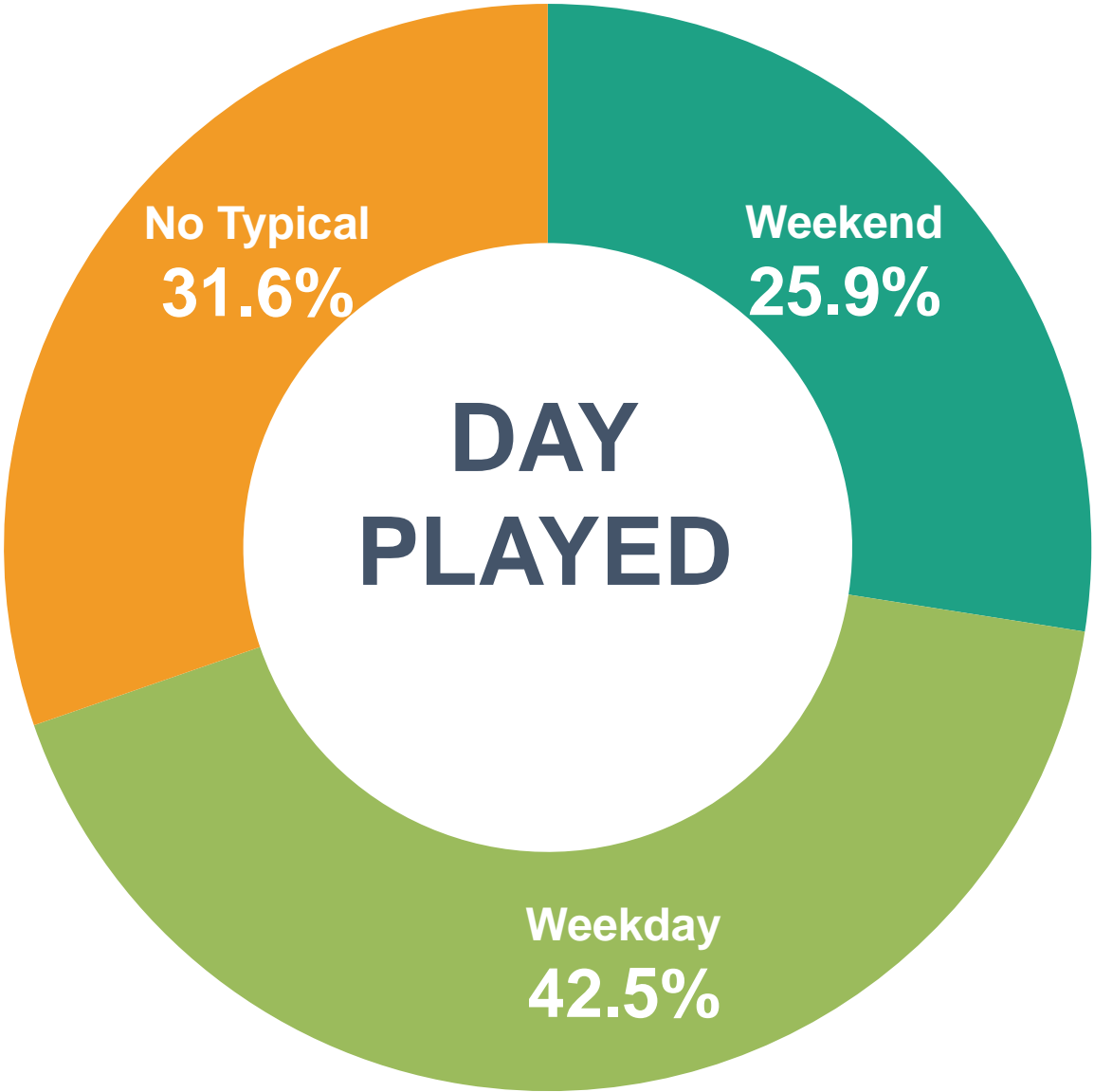
Employment

Our sample was nearly bifurcated with approximately 46% to 52% either being employed or retired and less than 2% identifying as unemployed, homemaker or student.



Golfer Behaviors

Choices at the golf course

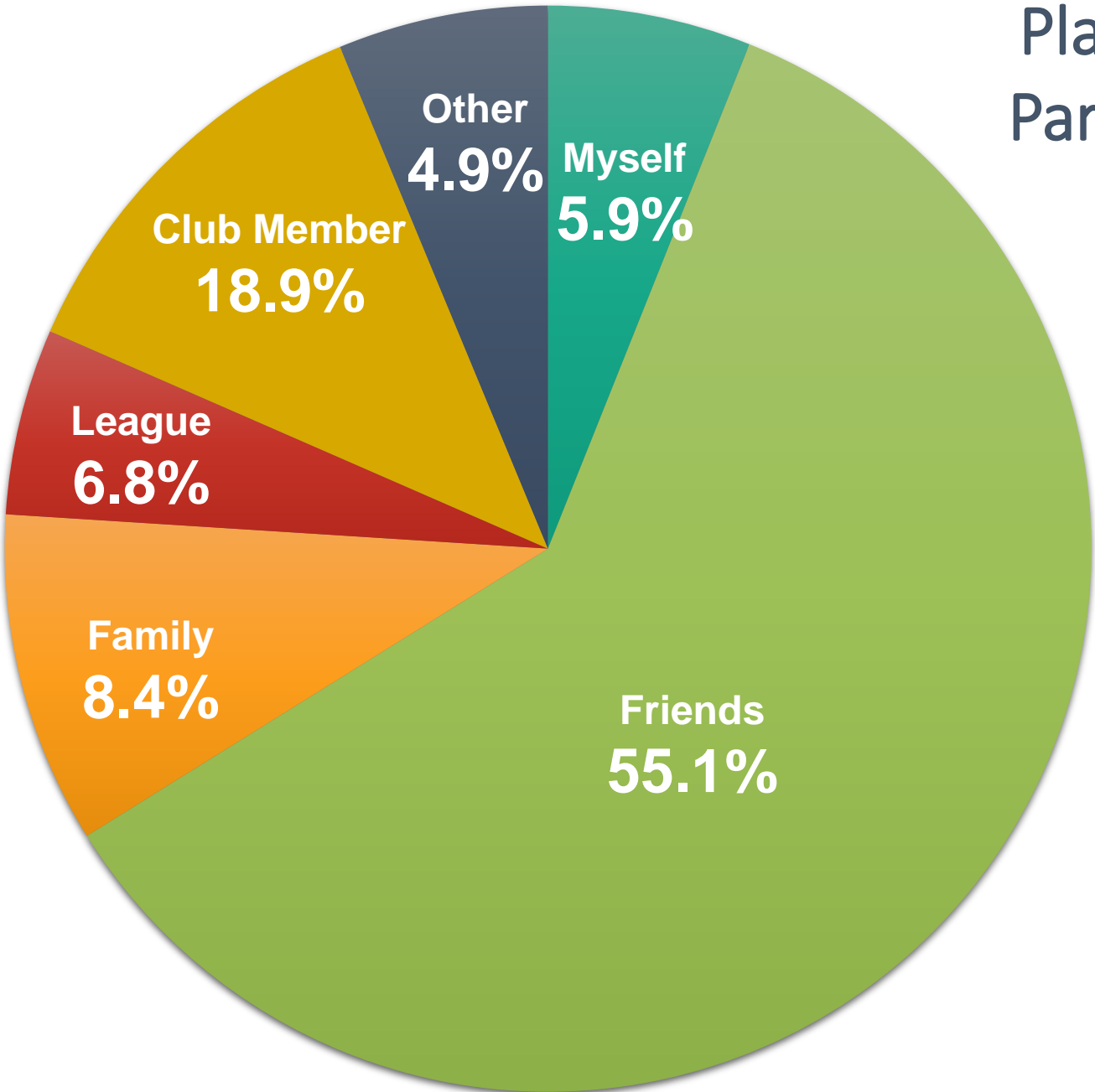


For the purposes of this research, weekends are considered Friday, Saturday and Sunday with weekdays constituting the remaining days of the week.

Early morning was considered before 9am, mid morning as between 9am and noon, early afternoon anytime between noon and 3pm and afternoon considered anytime after 3pm. Early morning to noon constituted the largest number of players indicating their preferred time to play of 81.3%.

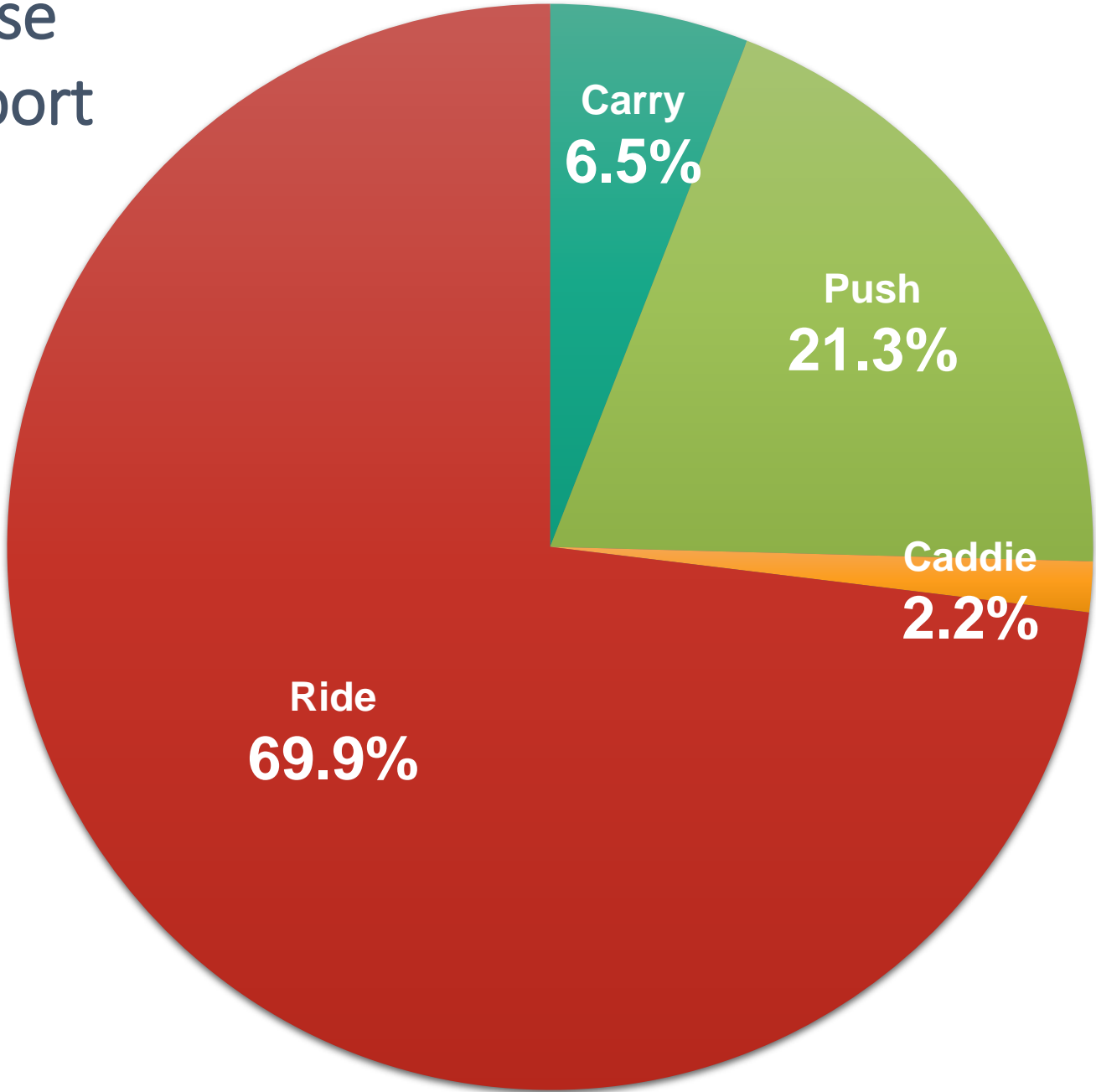
Golfer Behaviors

Choices at the golf course



Playing Partners

Course Transport

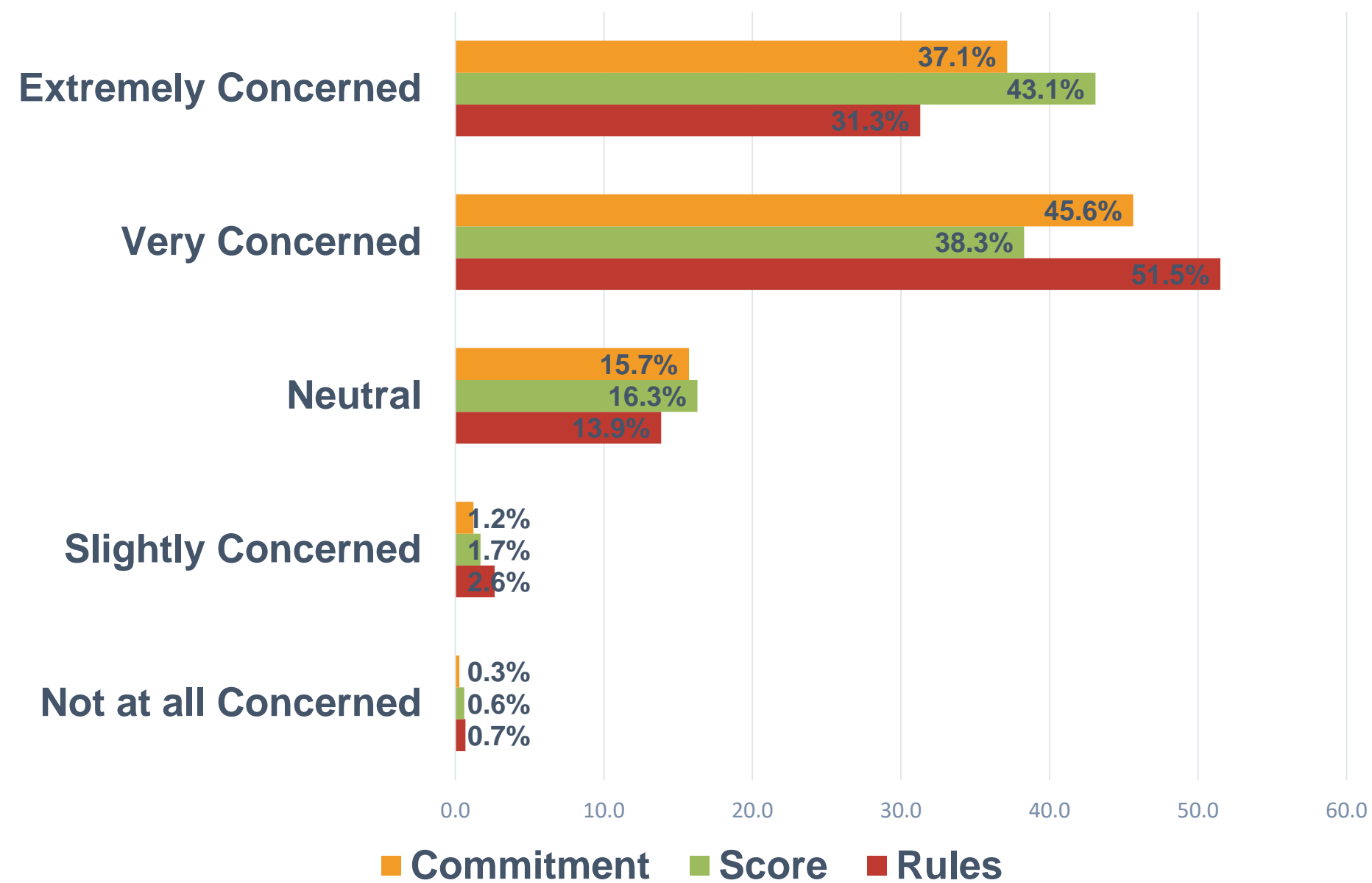


This indicates that while golf allows for many different playing partners, respondents first choice for golf companions lie outside of the family. Club members as each facility is second in selection of players to fill their foursome.

The preferred mode of transportation on the golf course was represented in riding a golf cart. Walking during the round is second in selection.

Golfer Psychographics

Understanding personal view of the game



COMMITMENT

Respondents were asked to identify their overall commitment to the game to help identify loyal players who may minimize the rules or overall score, with an average rating of 4.18.



RULES

Respondents were asked to identify their overall concern for rules of the game, this addresses the spirit, honor and etiquette of the game, with an average rating of 4.10.



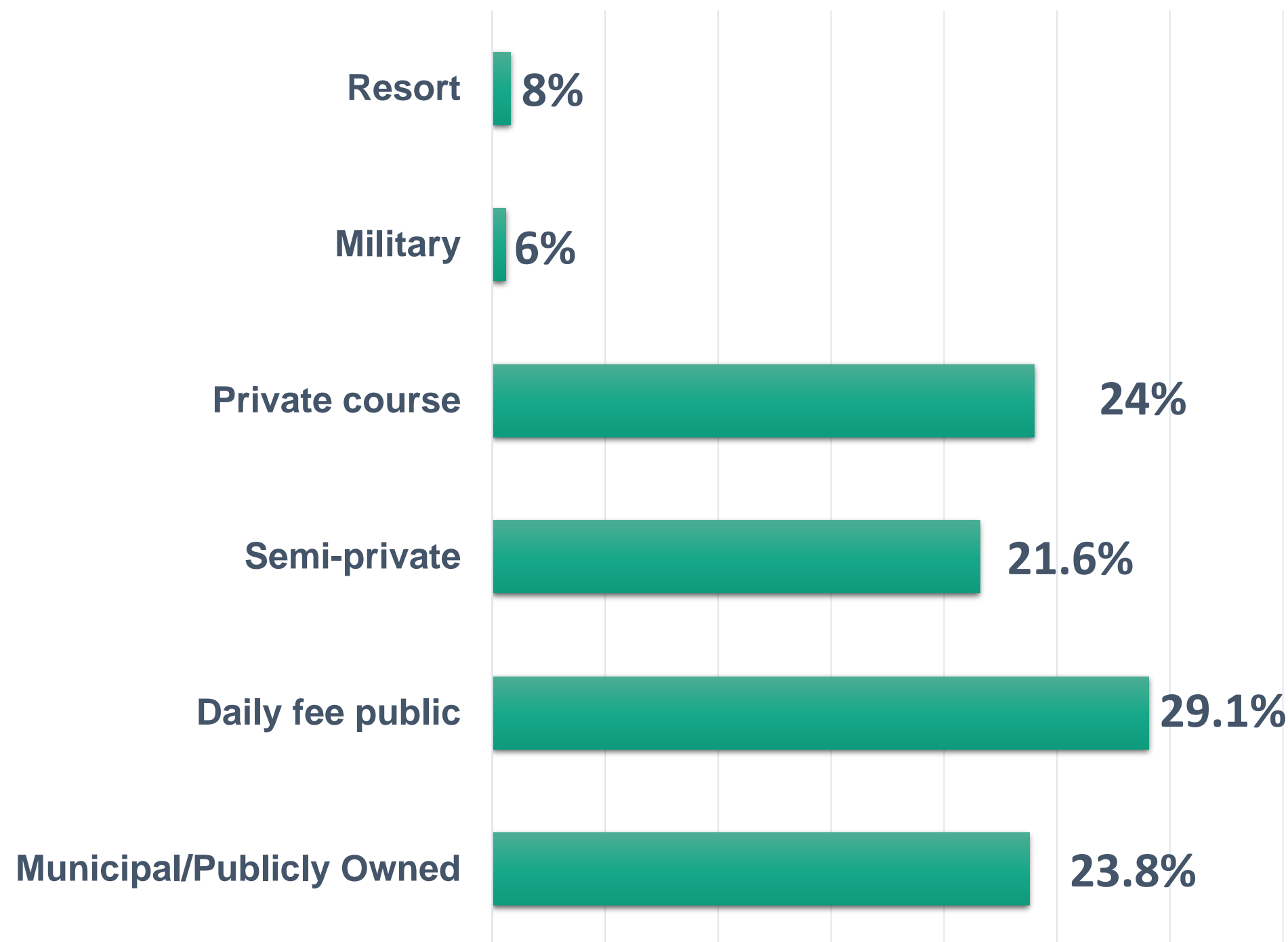
SCORE

Respondents were asked to identify their overall passion for and drive to personally get better at the game, with an average rating of 4.22.

Golfer Demographics

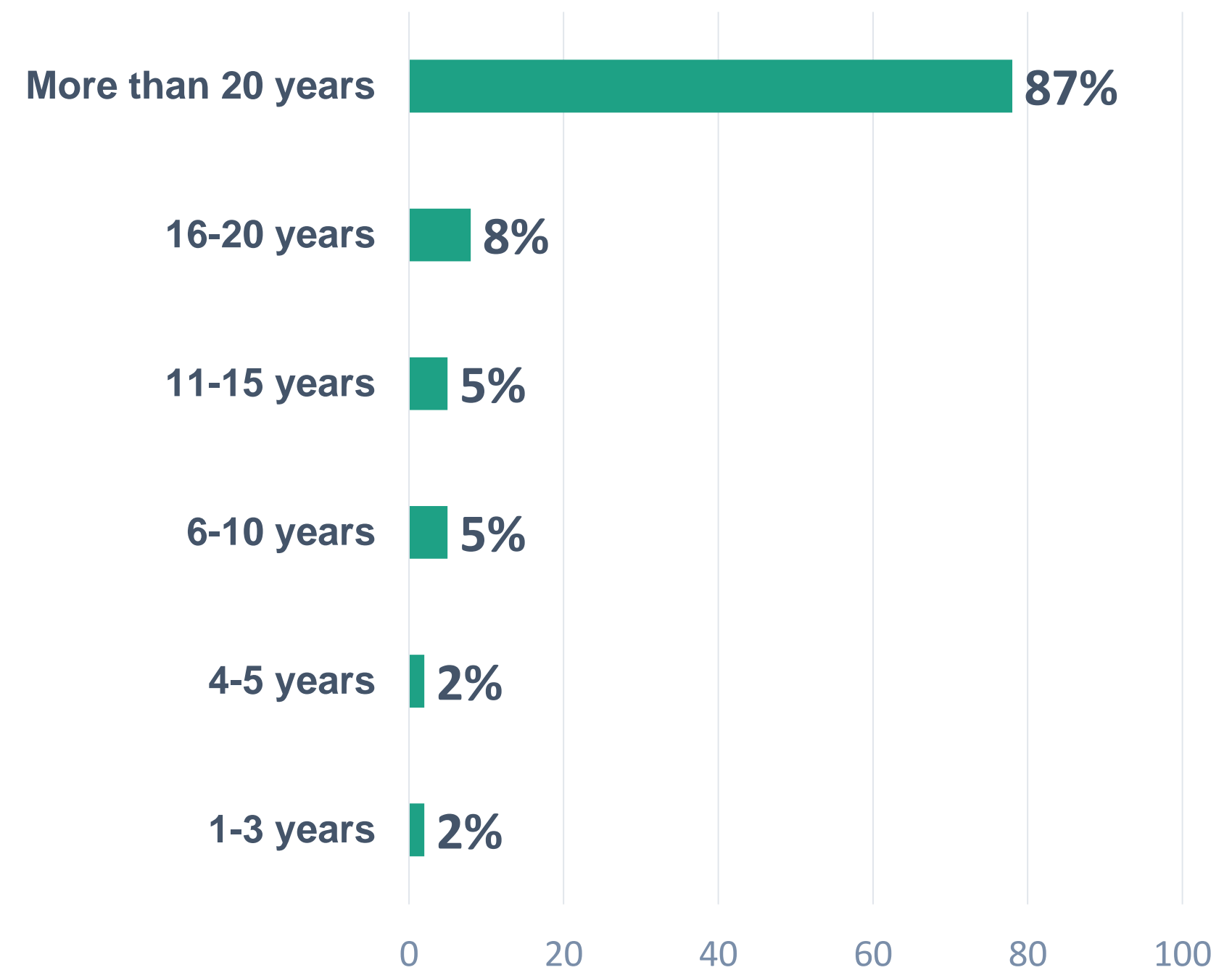
Understanding Courses Played and Years Playing

Course Played



The breakdown of respondents indicated they played a variety of golf courses as they home course. Daily free access, private club restrictions, and municipal/publicly owned were the largest selected.

Years Played



Seventy-eight percent of the respondents have been playing the game of golf more than 20 years.

Golfer Touchpoints

Summarized Touchpoints

To efficiently leverage the 77 on-course touchpoints established and analyzed in the initial study, factor analysis found 28 touchpoints grouped into course design, course quality, play pace, player support, and employee interaction could effectively explain a significant amount (65%) of overall course satisfaction. This falls well into statistically significant parameters as an effective way to summarize the number of variables needed to understand golfer satisfaction.

The following slides outlines which touchpoints fall into the five representative categories, along with factor loadings that demonstrate the appropriate fit and explanatory power of each touchpoint.

	Course Design	Course Quality	Pace of Play	Player Support	Employee Interaction
Overall challenge of the course	.66				
Balance between aesthetics and playability	.66				
Topographical features of the course	.77				
Planned integration/design with naturally occurring features	.72				
Style of the course	.78				
Memorability of holes	.71				
Effective use of trees/water/hills as a design feature	.72				

Golfer Touchpoints

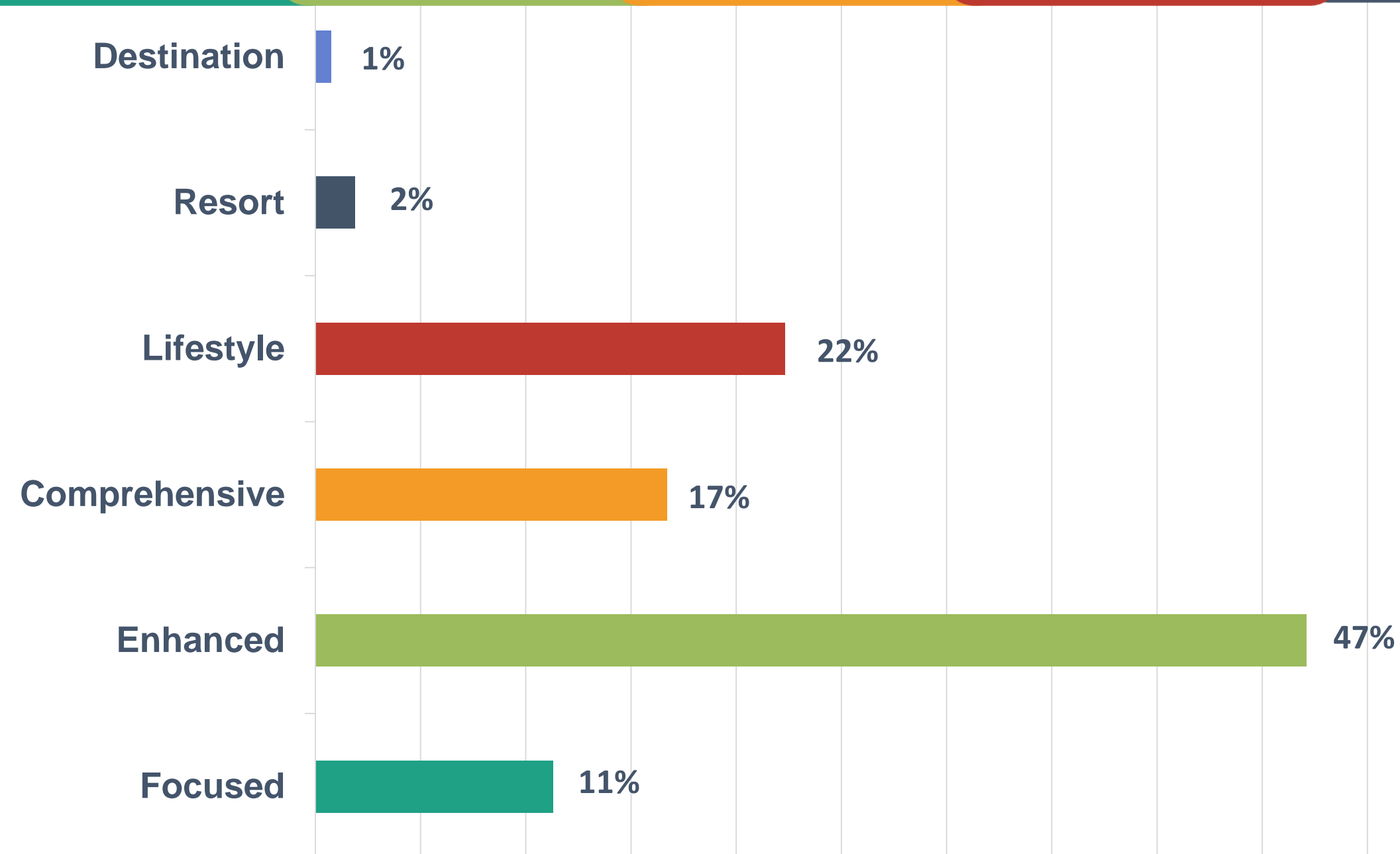
Summarized Touchpoints

	Course Design	Course Quality	Pace of Play	Player Support	Employee Interaction
Quality and condition of the fairway (bare spots, damage, etc.)		.76			
Quality of tee boxes		.55			
Quality and condition of greens (bare spots, ball marks, damage, etc.)		.78			
General course cleanliness/upkeep		.67			
Speed of other players on the course (non-playing partners)			.90		
Pressure to go faster/slow down			.56		
Length of wait on the course between shots			.80		
Pace of play expectations followed/enforced			.79		
Length of wait at the turn			.54		
Corrective actions for golfers not following pace standards			.68		
Emergency facilities and communications				.57	
Golf hints and hole diagram provided by the scorecard				.68	
General course and location information of features on scorecard (i.e., bathrooms)				.75	
Yardage book information/caddie knowledge				.56	
Signage/directions				.50	
Starter's communication of course information and unique insights					.84
Starter's effectiveness in informing pace expectations and etiquette basics					.70
Etiquette and friendliness demonstrated by the ranger/marshal					.78
Fair treatment of all groups by the ranger/marshal					.63
Role of ranger/marshal beyond enforcement of pace					.64
Overall quality of customer service interactions					.56

Course Categories Overview

What our sample looks like

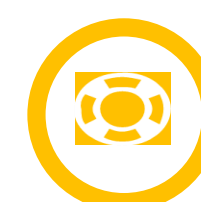
Focused	Enhanced	Comprehensive	Lifestyle	Resort	Destination
A facility driven by the bare essentials of providing a value-driven place for people to enjoy a round of golf.	A facility that provides an upgraded experience for golfers who want improved golf features and services, including non-golf customer-course interactions.	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.	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.	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.	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.



*This bar chart indicates the number of courses that classified themselves in the sample respondents. Two classifications were not analyzed since the sample size for Resorts and Destination were not enough to statistically continue for analysis.

Differences

Various differences between category of player at each course



Age

Golfers at **Focused** and **Enhanced** courses are significantly **younger** than those at **Lifestyle** properties.

Income

Golfers at **Focused, Enhanced** make **less** money than those at **Lifestyle** properties.
This would make sense as private clubs are more expensive compared to other courses.

Education

Golfers at **Lifestyle** golf courses have a significantly **higher** level of **education** as compared to those who play at **Enhanced** courses.

Years Play

Lifestyle golfer have played golf **longer** with no significant differences with players at **Focused, Enhanced, Comprehensive.**

Rounds

Golfers at **Lifestyle** properties take full advantage of their facilities as on average they **play** significantly more rounds than at **Comprehensive, Enhanced, and Focused**, courses.

Differences

Various differences between category of player at each course



Score

Interestingly enough, there was no significant differences in **score** except for those who play at **Lifestyle** courses, as their average score (88.43) was significantly **lower** than players who frequent the other courses.



Scoring

There were no significant differences when it came to the level of **concern** for **overall score**, even though **Comprehensive** course players registered the **highest** level of concern for their score at 4.28 out of 5.



Rules

When it comes to how golfers see the game of golf and **rules**, golfers at **Lifestyle** courses are **significantly more concerned** about the rules of golf as compared to the other types of course players.



Commitment

Golfer **commitment** also showed some unique considerations as players at **Lifestyle** courses were **significantly more loyal** to the game than Focused or Enhanced player, with no differences found between the three other groups.



Expenditures

From a golf **expenditure** perspective, course expenditure was similar with no significant differences presented once adjusted for outlier expenditures. While the data did show a much **higher average spend** for **Lifestyle** players, this was mitigated once adjusted for those unique situations.

Course Satisfaction

Course Type Understanding

To further examine potential differences between course types, overall satisfaction of seven course attributes from the 2018 Golfer Experience Survey was conducted. Significant differences in overall course attribute satisfaction exist between golfers at the four types of courses assessed. When reading the table below/above, it is important to remember that courses with superscript letters that are different indicate a significant difference between them and course with other letters. For an illustrative example, let's examine overall satisfaction. When it comes to differences in this first column, lifestyle golfers are significantly more satisfied than other types of course golfers (c), whereas comprehensive golfers are significantly more satisfied than focused course golfers (b as compared to a) but are similarly satisfied as enhanced players (both b). Enhanced course players are similarly satisfied as both focused and comprehensive players (both a and b).

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

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

Course Satisfaction

Touchpoint Understanding

To further examine potential differences between course types, satisfaction 28 course touchpoints from the 2018 Golfer Experience Survey was conducted. Significant differences in overall course attribute satisfaction exist between golfers at the four types of courses assessed. When reading the table below, it is important to remember that courses with superscript letters that are different indicate a significant difference between them and course with other letters. For an illustrative example, the horizontal course design feature of overall challenge found that focused was significantly different than the other three courses (A), enhanced and comprehensive were similar with enhanced being significantly different than lifestyle. While comprehensive courses were similarly to both enhanced and lifestyle courses, it was significantly different than the focused courses.

To further examine differences, zero order correlations were calculated to determine the importance of touchpoints in contributing to overall satisfaction. These values ranged between .214 and .553, and top-half touchpoints were identified for each type of course and are identified with asterisks. These top-half touchpoints were values above .411 for Focused, .346 for Enhanced, .324 for Comprehensive, and .298 for Lifestyle courses. There were some common areas of importance across all types of courses, but there were differences as well. For instance, golfers at all four courses indicated that challenge was an important contributor (top half touchpoint) to overall satisfaction while only comprehensive course players didn't find topographical features to hold the same level of importance as golfers at other courses.

The following pages presents the results of these analyses and follow the same methodology to present results.

Course Design Touchpoints

	Focused	Enhanced	Comprehensive	Lifestyle
Overall challenge of the course	A*	B*	B,C*	C*
Balance between aesthetics and playability	A*	B*	B,C*	C*
Topographical features of the course	A*	B*	B	C*
Planned integration/design with naturally occurring features	A*	B*	C*	C*
Style of the course	A*	B*	B*	C*
Memorability of holes	A*	A	B*	B*
Effective use of trees/water/hills as a design feature	A	A*	B*	B*

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

Course Satisfaction

Touchpoint Understanding

Course Quality Touchpoints

	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*

Pace of Play Touchpoints

	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.*

Course Satisfaction

Touchpoint Understanding

Player Support Touchpoints

	Focused	Enhanced	Comprehensive	Lifestyle
Emergency facilities and communications	A*	A	B	C
Golf hints and hole diagram provided by the scorecard	A*	A	B	A
General course and location information of features on scorecard (i.e., bathrooms)	A*	A	B	B*
Yardage book information/caddie knowledge	A	A	B	B
Signage/directions	A,B,C*	B	A,C	A,C

Employee Interaction Touchpoints

	Focused	Enhanced	Comprehensive	Lifestyle
Starter's communication of course information and unique insights	A	A	A	A
Starter's effectiveness in informing pace expectations and etiquette basics	A	A	A*	A
Etiquette and friendliness demonstrated by the ranger/marshal	A	B	C*	D
Fair treatment of all groups by the ranger/marshal	A,C	A,C	A,C	B,C
Role of ranger/marshal beyond enforcement of pace	A,C	C*	B,C*	C
Overall quality of customer service interactions	A	A	A,B	B

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

Playability Differences

Course Challenge Understanding

	Composite Playability – Difficulty Comparison	Male Playability – Difficulty Breakdown	Female Playability – Difficulty Breakdown
Level 1 – Casual	105	100	115
Level 2 – Moderate	670	778	639
Level 3 – Advanced	1203	1224	1117
Level 4 – Expert	671	564	728
Level 5 – Expert +	34	27	86

When examining course playability, one of the challenges was attempting to make this number as simple to apply as possible. While both male and female playability statistics were supplied, an unadjusted composite playability score for each course was calculated (column 1). Using the same parameters for all three groups, a similar pattern in number of courses being classified based upon challenge was identified with no distinctive indicators predicting course classification based upon playability. The table to the left provides a breakdown of the number of courses and how they were classified.

Analyses was conducted to understand significant differences between playability metrics and course type. The table to the right lists the playability score for each type of course. Looking at each playability score you can see that there are significant differences (at the .05 level) between course types where the letter associated with each number is different. For illustrative purposes, examine the composite and female playability metric scores across the various types of courses. Since each number has a different letter, scores for each type of course are significantly different. This is in comparison to the Male Playability score where the playability statistic is statistically similar between comprehensive and lifestyle courses. These results indicate that while a composite score could be applicable, there are concerns since no statistical difference for male players at these two types of courses was present in the sample.

	Composite Playability – Metric Mean	Male Playability – Metric Mean	Female Playability – Metric Mean
Focused	2.50 ^a	2.40 ^a	2.54 ^a
Enhanced	2.80 ^b	2.73 ^b	2.86 ^b
Comprehensive	3.13 ^c	3.07 ^c	3.15 ^c
Lifestyle	3.28 ^d	3.17 ^c	3.39 ^d

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

Playability Satisfaction

Course Challenge Understanding

To further examine potential application of the playability metric, overall satisfaction of seven course attributes from the 2018 Golfer Experience Survey was analyzed. From this analysis, significant differences were found between golfers who chose to play at courses with different playability metrics. For instance, when reading the table below, it is important to remember that courses with superscript letters that are different, indicate a significant difference between them and different levels of playability. For an illustrative example, let's examine overall satisfaction (first column). When it comes to differences, advanced, expert and expert+ golfers are significantly more satisfied than other types of course golfers (b), whereas casual and moderate course golfers are less satisfied (a as compared to b) but advanced course golfers are similarly satisfied as all other course players (both a and b).

	Overall	Design	Fairway	Greens/Tees	Pace	Service	Employees	General
Level 1 – Casual	3.97 ^a	3.88 ^a	3.55 ^{a,c}	3.80 ^a	3.47 ^a	3.32 ^a	4.17 ^a	3.86 ^a
Level 2 – Moderate	4.07 ^a	4.02 ^a	3.55 ^a	3.93 ^a	3.46 ^a	3.51 ^{a,b}	4.09 ^a	3.95 ^a
Level 3 – Advanced	4.13 ^{a,b}	4.14 ^b	3.73 ^{a,b,c}	4.03 ^{a,c,d}	3.51 ^a	3.52 ^a	4.09 ^a	4.06 ^a
Level 4 – Expert	4.24 ^b	4.27 ^b	3.82 ^{b,c}	4.14 ^{b,d}	3.59 ^a	3.58 ^b	4.12 ^a	4.17 ^a
Level 5 – Expert +	4.45 ^b	4.45 ^b	3.91 ^{b,c}	4.39 ^{b,c,d}	3.58 ^a	3.61 ^a	4.09 ^a	4.24 ^a
Average	4.14	4.13	3.70	4.03	3.52	3.52	4.10	4.05

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

Operational Implementation

Insights from a management perspective

Golf course operators have several considerations to consider as they open their doors to players of different abilities, demographics, and motivations in selecting their facility to play. Those carefully planned operational decisions can impact the overall satisfaction of the player's round.

When an operator better understands their facility concerning access, rates, difficulty, and playability, it allows operators an opportunity to understand what is truly offered and provided at their facility. Understanding what a golf course provides its players can better align operational decisions, leading to returning customers. As operators understand more about the perceived experience quality, the facilities' perceived quality, the difficulty of the golf course design, length, and playability, adjustments can be made to serve the customer better.

Operational efficiency occurs by making appropriate comparisons to similar facilities based upon the scope of customer experiences, revenues, expenses, and the array of amenities presented to players. Contemporary classifications, such as focused, enhanced, comprehensive,

lifestyle, resort, and destination, provide operators with a new look at their facility and potential competitors.

By recognizing a facility's unique characteristics and offerings, they can build upon current tactics to amplify the services, amenities, and features they offer. This can lead to considerations in how they create an experience specific to their strengths and, in turn, prepare a unique experience for the customers they serve.

As operators examine their facility based upon their revenue-generating services/features, course playability, length, and a balance between golf and non-golf activities, objective reflections can be made with an eye to strategies that meet and exceed the expectations of their customers.

For example, regardless of a course's typology and player's demographics and abilities, the findings showed pace of play, employee interactions, and general course services are viewed and graded as equally important in their overall satisfaction regardless of course classification. As an operator, the immediate takeaway will be to

review course operations to allow for the best outcomes with the greatest overall satisfaction. This is one example of how operators can learn and apply their best practices to the ever-changing landscape of players and their expectations.

As operators better understand their course's typology, they can differentiate themselves and build upon their competitive advantage through specific marketing and social media messaging to attract the players with the expectations matching their facility. Operators can establish comparative strategies, build perceptual maps of how customers see their course (i.e., pace and employee interaction) and build back an experience that is better but different from potential competitor courses. If operators' goal is to acquire and retain golfers by maximizing loyalty, leveraging these new classifications will allow courses to understand customer's preferences and anticipate their needs.

About Us

The Research Team



Eric T. Brey, Ph.D., is a Professor at the University of Wisconsin-Stout where his work focuses on the implementation of customer-centric strategy and service design influences on organizational success. He has been recognized for innovation as an AT&T Technology Fellow and an extraordinary marketing mind by HSMAI while being quoted in international media outlets including Forbes, Business Week, China Post, USA Today, New York Post, Washington Post, and CBS News. He has consulted internationally for fortune 50 companies, industry associations and government organizations on wide-ranging customer strategy issues. Eric received his Ph.D. from Purdue University.



Kristine Schoonover, Ph.D., is a Professor at the University of Wisconsin-Stout where she teaches and conducts research in the areas of customer experience management, human capital development, and training practices for the golf industry. She is particularly focused on helping small courses in the development of best practices to maximize revenues, retain great staff and stay current with best practices. Kris has served more than 25 years in the golf industry through coaching, teaching, and working in operations. In 2007 Kris started working at Erin Hills Golf Course, where she is Director of Operations/Assistant Competition Director. She has worked closely with the USGA in hosting three championships at Erin Hills: the 2008 U.S. Women's Amateur Public Links, the 2011 U.S. Amateur and the 2017 U.S. Open.

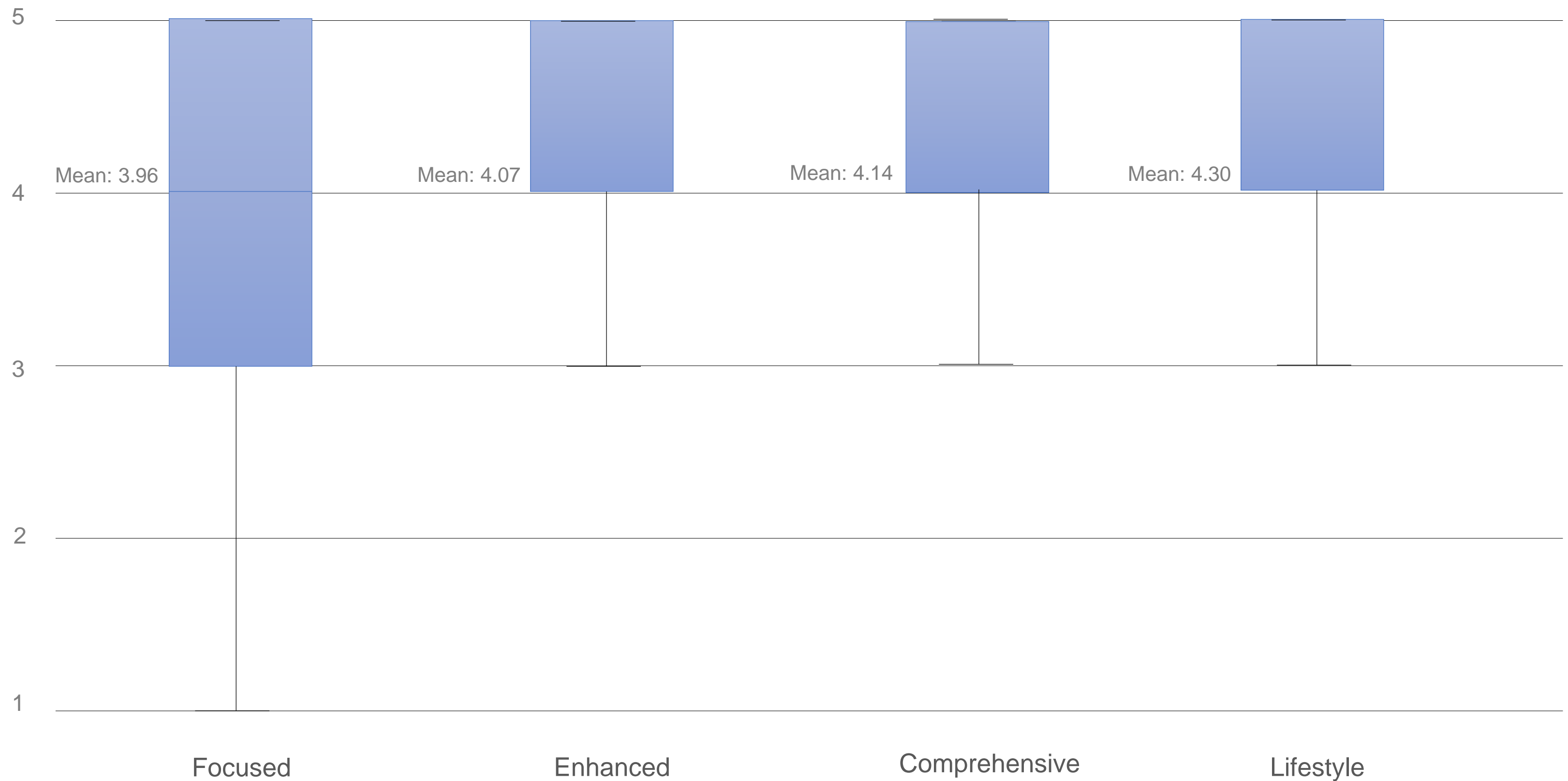
“*Research is to see what everybody has seen, and to think what nobody else has thought*
– A. Szent-Gyorgyi

Disclaimer

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Appendix A: Course Types Comparison

Overall Satisfaction



*All course categories had evaluations ranging from 1 to 5, however, only the Focused course had values that were not considered outliers below 3. Due to the nature of the data, Enhanced, Comprehensive and Lifestyle courses have their 25th and 50th percentiles listed as 4 out of five with the 75th percentile and upper range listed as 5 out of five.