

**\$66,500,000**

# Defining the Golfer Experience

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5th Golf Innovation Symposium

USGA®

**Experience Touchpoints**

**01**

**Time Influence**

**02**

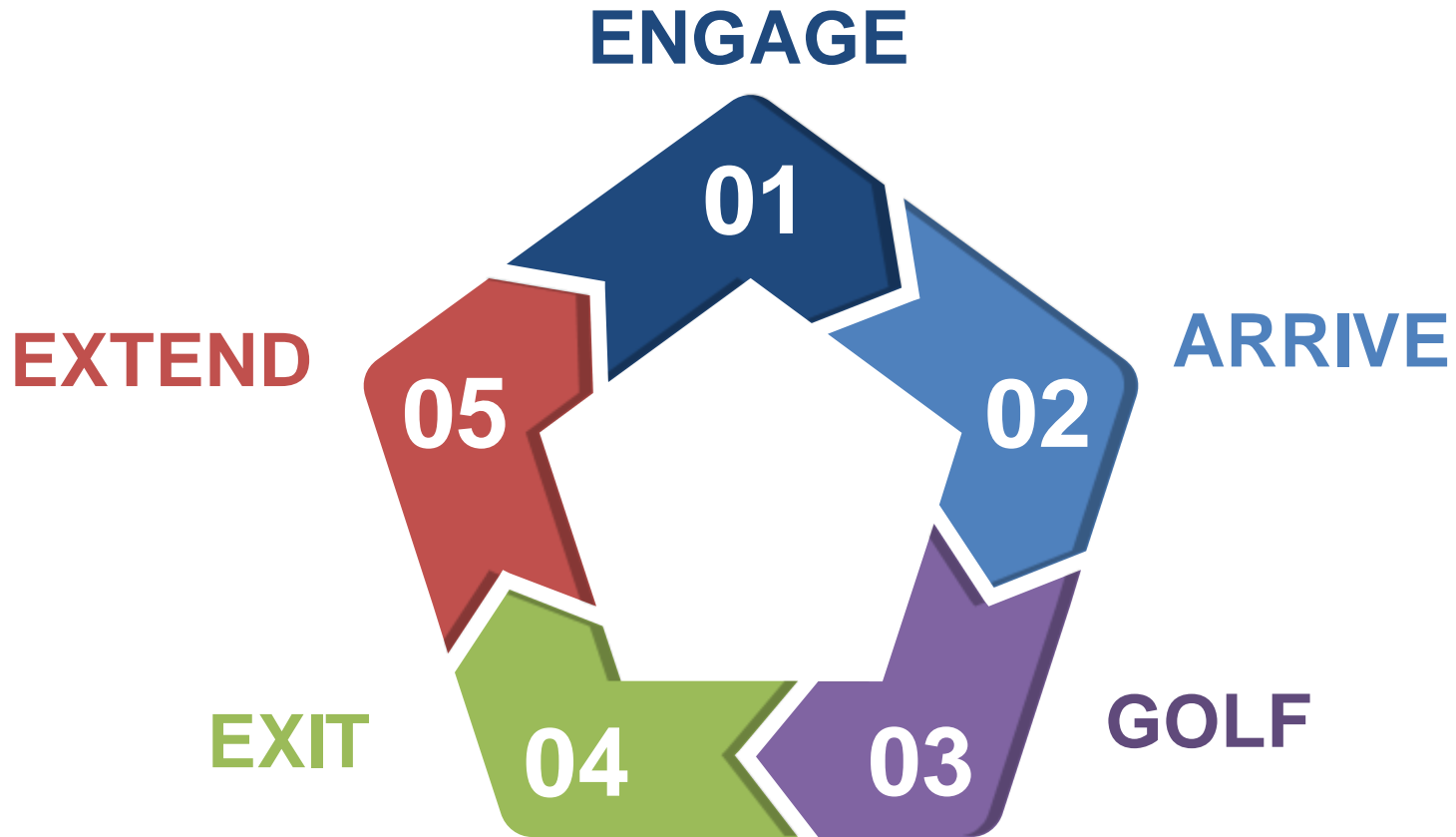
**Golfer Satisfaction**

**03**

# Why do you play golf?

- 1 /** Love of the game
- 2 /** Spending time with friends/family
- 3 /** Challenge of the game/improvement
- 4 /** Exercise/physical activity
- 5 /** Visual beauty/spending time outside

# Journey Touchpoints



# Engage

- Advertisements
- Programming
- Flexibility
- Digital footprint
- Barriers
- Course persona
- Pricing
- Inquiries





# Arrive

- Facilities
- Amenities
- Technology
- Staff interactions
- Process and flow
- Fees and rates
- Course information





# Golf

- Course design
- Fairway, rough, bunkers
- Tees and greens
- Pace of play
- Services features
- Employee interaction
- General course characteristics



# Exit

- Amenities
- Interactions
- Guest Services
- Signage
- Facilities
- Incentives
- Interaction




# Extend

- Personal engagement
- Digital contact
- Incentives
- Value creation



# Motivations

- 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



# Expectations

- Appropriate behavior
- Course quality
- Employee interaction
- Quality service
- Personal interaction
- Time considerations
- Value proposition



# Desires

- Golfer Etiquette
- Rules
- Flexibility
- Welcoming
- Technology Escapism
- Course Responsiveness





# Strategic Implications

- More than 1,000 touchpoints
- Unmet opportunities exist as the golfer is leaving the course
- Underlying desires and expectations for golf



# Time Influence

# Time Measurements

- Pace of play
- Total time
- Time waiting
- Time intervals
- Course time
- Travel time
- Playing partner's time
- Other player's time
- Time remediation
- Timely departure
- Time expectations
- Time pressures



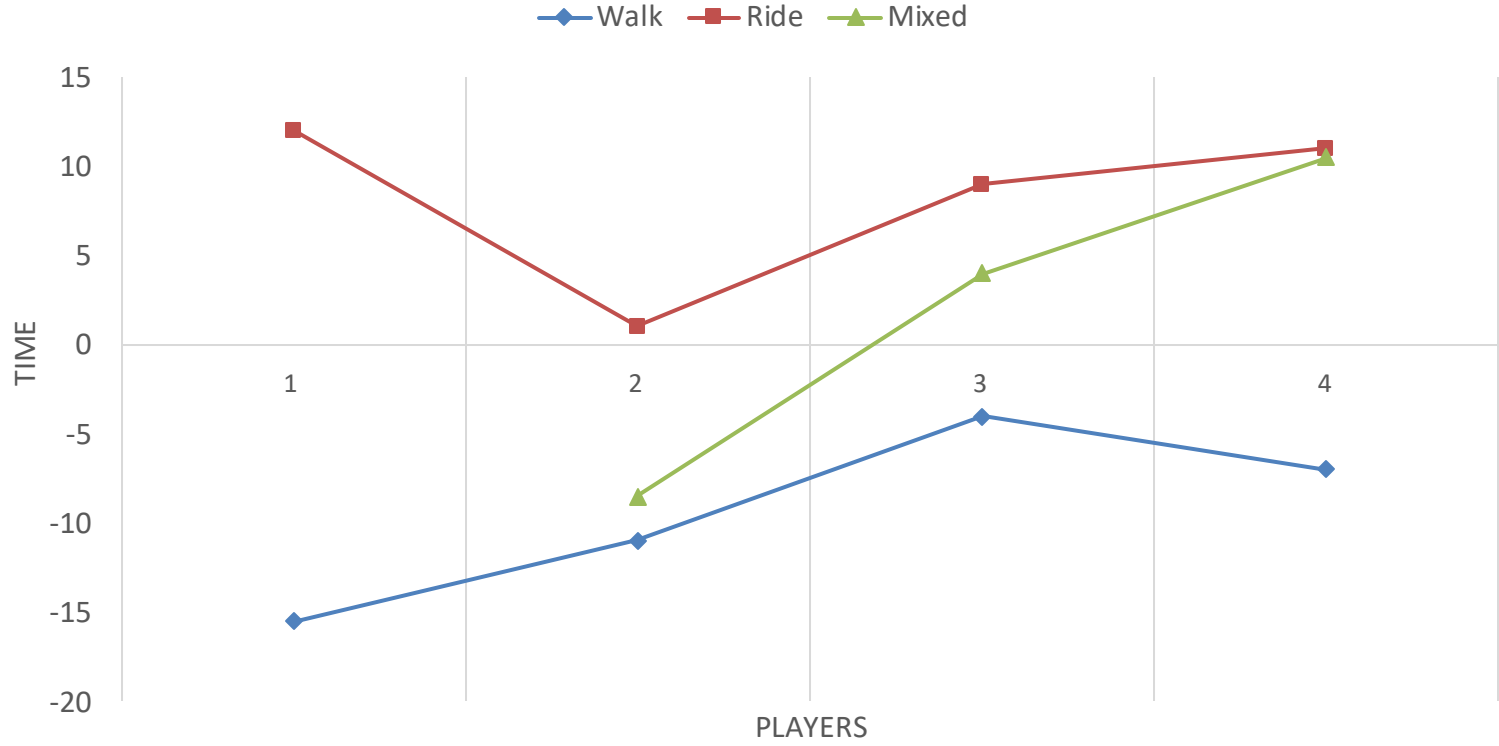
# Pace Comparison

## PACE

Walk	-10.48 <sup>a</sup>
Ride	6.37 <sup>b</sup>
Mixed	6.50 <sup>b</sup>
Morning	-4.71 <sup>a</sup>
Afternoon	8.67 <sup>b</sup>



\*\*Letters indicate significant differences between groupings at the .01 level



# Atypical Differences

- No difference in their average score
- No difference in the amount they spend
- No difference in miles traveled
- No difference in gender
- No difference in presence of children
- No difference in overall assessment of pace of play



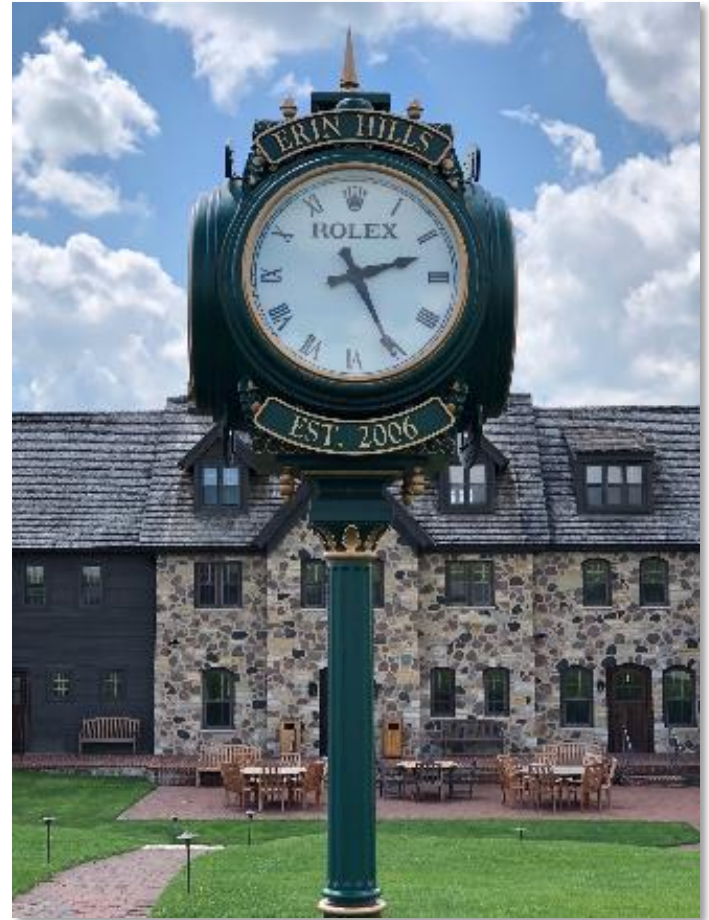
# Operational Insights

- Superintendent interviews
- General manager interviews
- Golfer interviews
- Golfer observations



# Strategic Implications

- Significant differences in overall satisfaction
- No significant time differences between gender
- Trending towards more significant pace differences



# Golfer Satisfaction

# Opinions: Facilities vs. Customers



Golfers

PLEASE INDICATE HOW IMPORTANT EACH FACTOR IS IN CONTRIBUTING TO YOUR OVERALL ENJOYMENT OF THE GAME



Facilities

80%	Conditioning of the golf course	88%
79%	People that you play with	68%
73%	Ease of booking a tee time	56%
71%	Pace of play	73%
71%	Physical beauty/aesthetics of the course	66%
67%	Availability of restroom facilities	37%
66%	Appropriate directional signage	20%

# Opinions: Facilities vs. Customers



Golfers

PLEASE INDICATE HOW IMPORTANT EACH FACTOR IS IN CONTRIBUTING TO YOUR OVERALL ENJOYMENT OF THE GAME



Facilities

65%	Availability of drinking water	32%
62%	Length of holes	31%
60%	How well I play	36%
58%	Being able to walk the course	34%
56%	Golf shop staff available to greet and direct you	72%
43%	Availability of golf carts with GPS	7%
43%	Flexible pricing (pay by hole or time)	6%

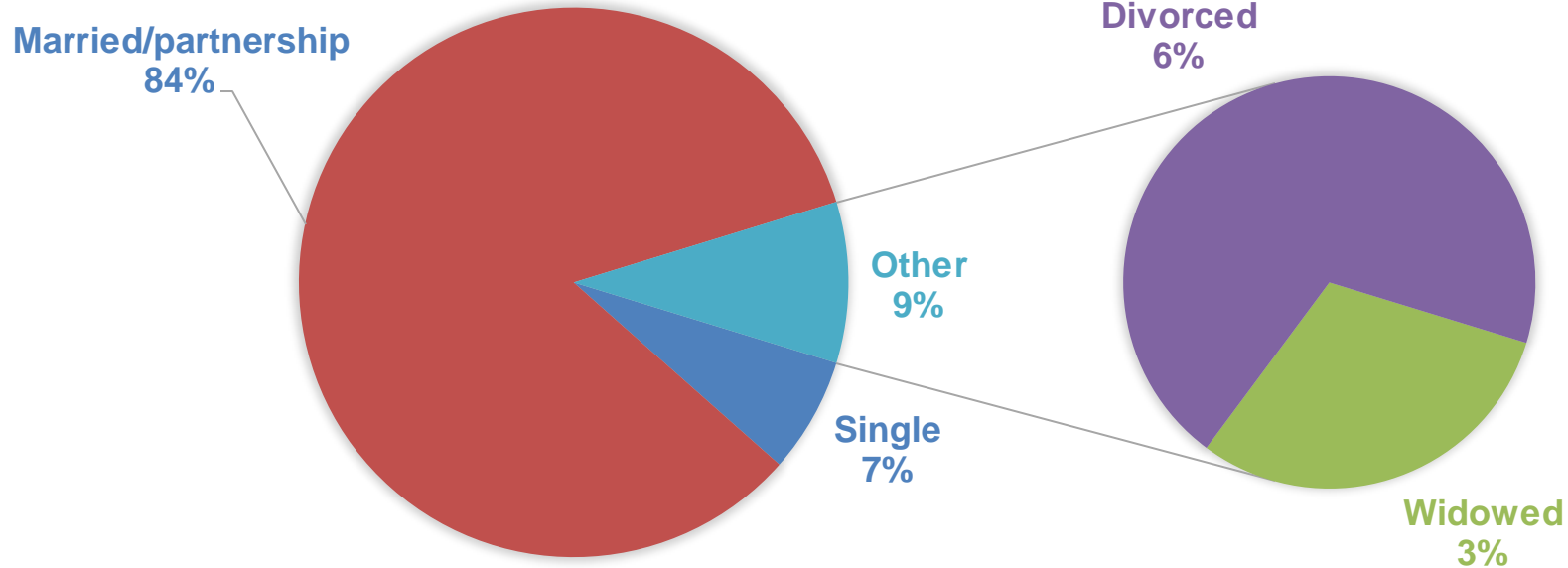




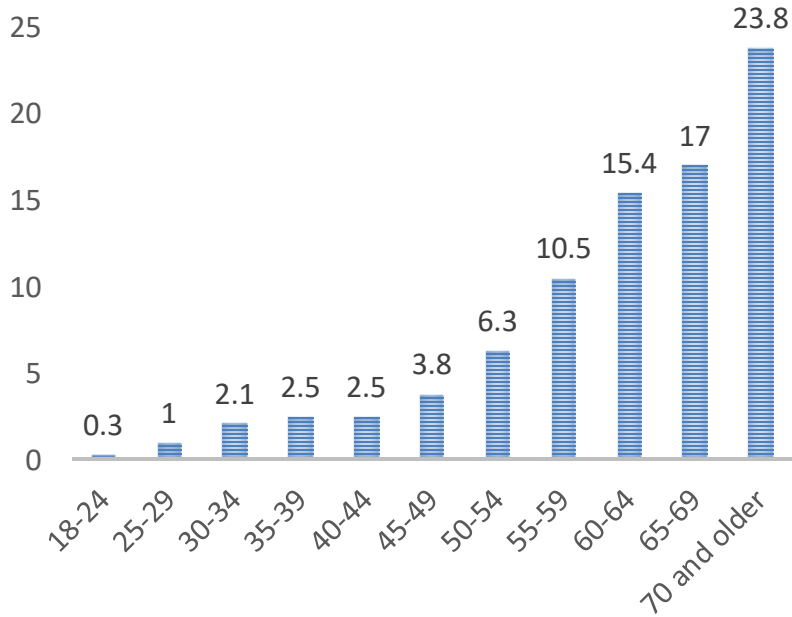


# Demographics

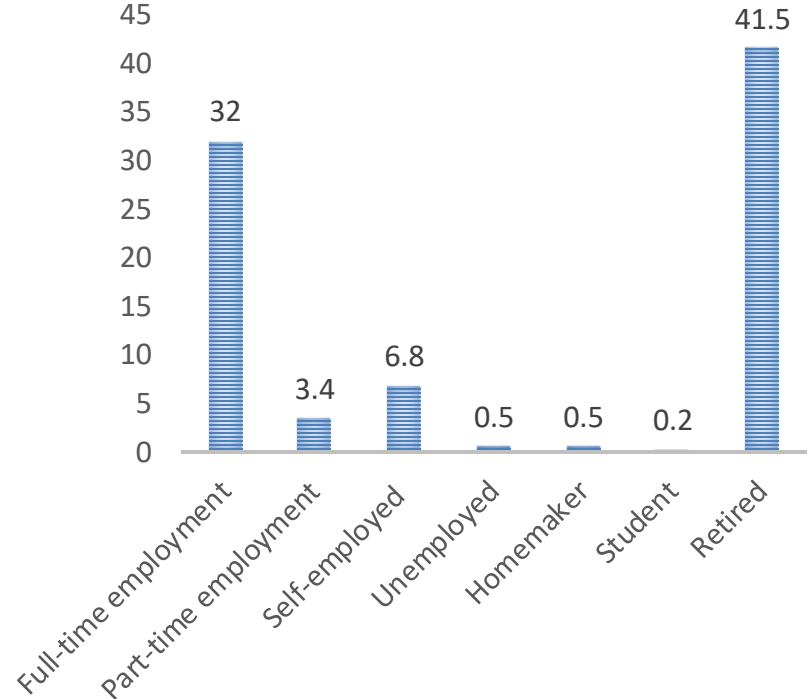
## STATUS



# AGE

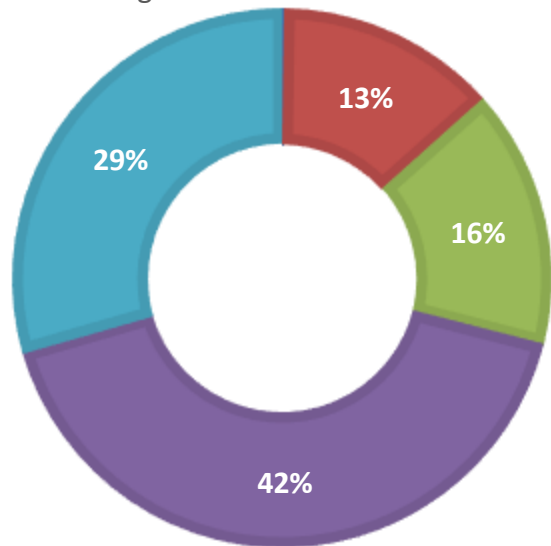


# EMPLOYMENT



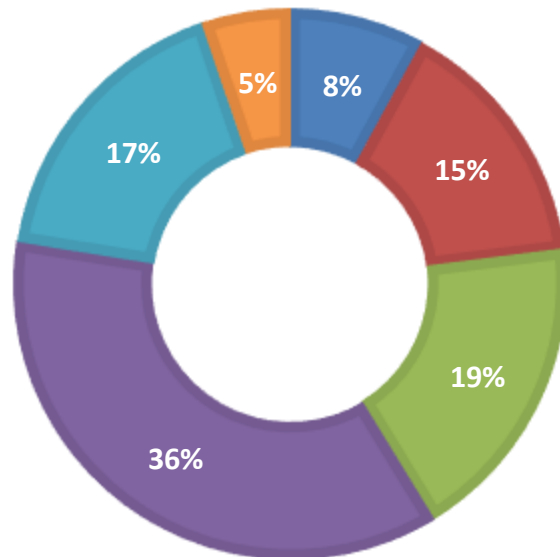
# COLLEGE

- No High School
- Associate's degree
- Graduate degree
- High School
- Bachelor's degree



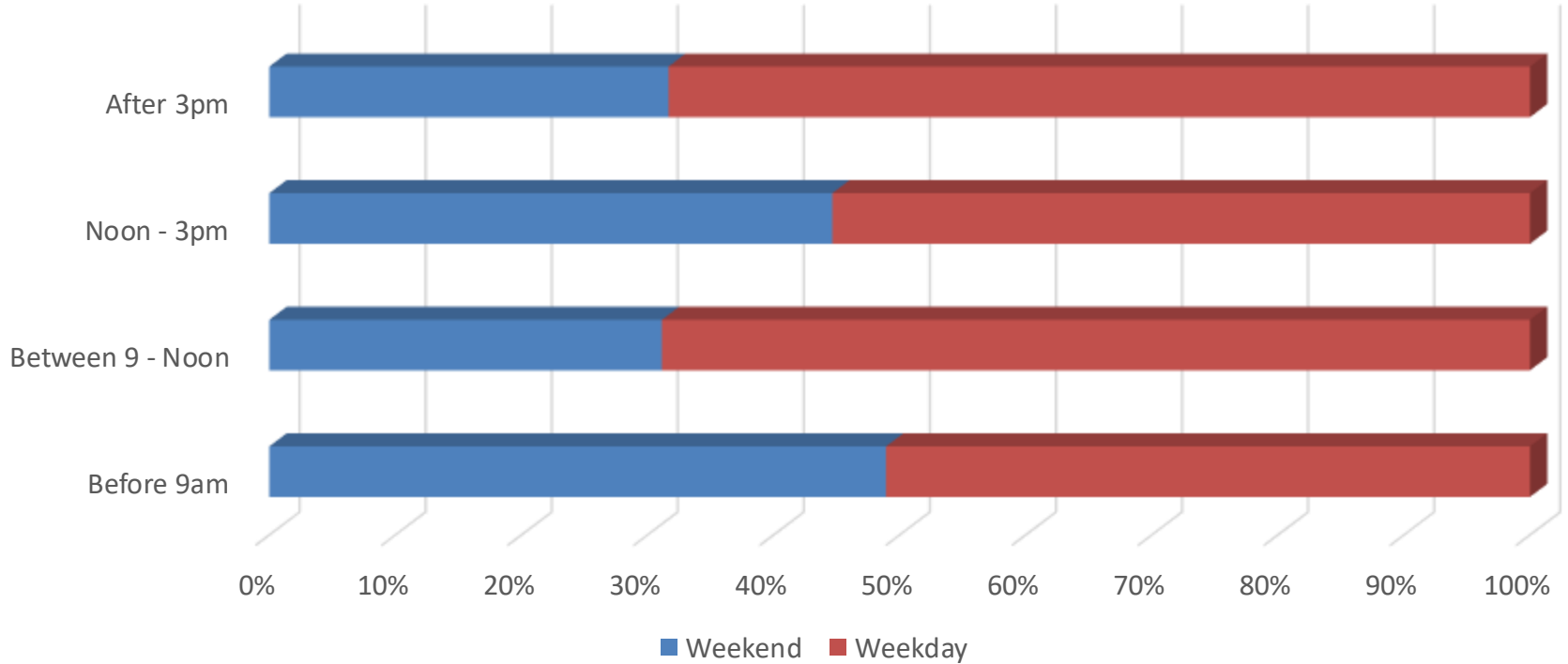
# INCOME

- Less than \$50,000
- \$75,000 to \$99,999
- \$175,000 to \$349,999
- \$50,000 to \$74,999
- \$100,000 to \$174,999
- \$350,000+



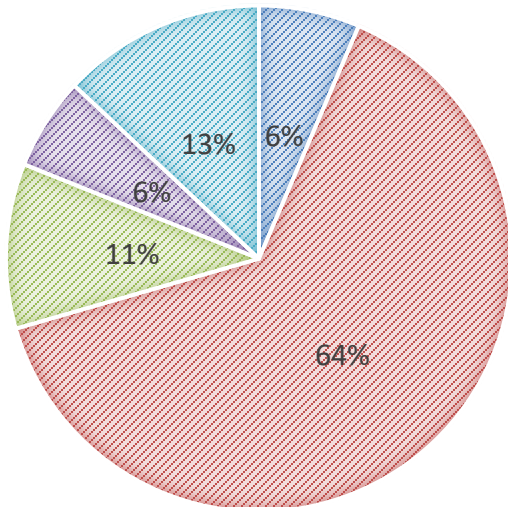
# Behaviors

## DAYS & TIMES



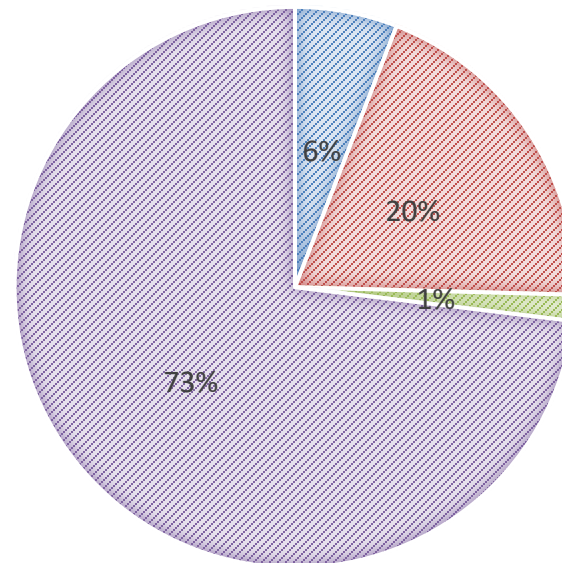
## PLAYING PARTNERS

- By myself
- With family
- With fellow club members
- With friends
- With league members



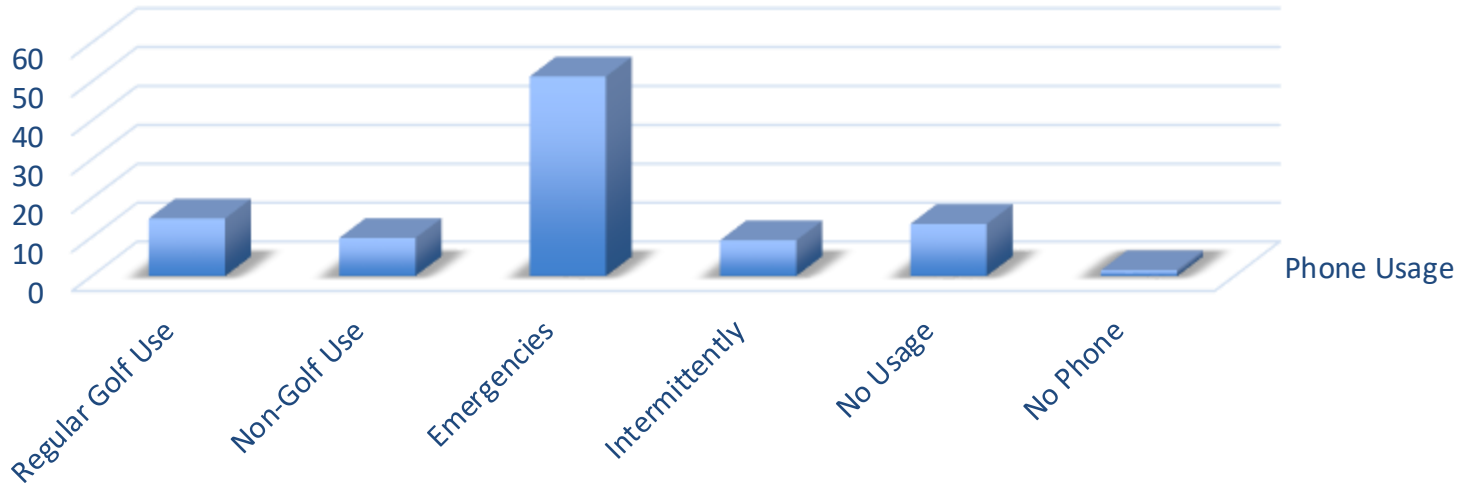
## COURSE TRANSPORT

- Walk and carry
- Walk and caddie
- Walk and push
- Ride a cart



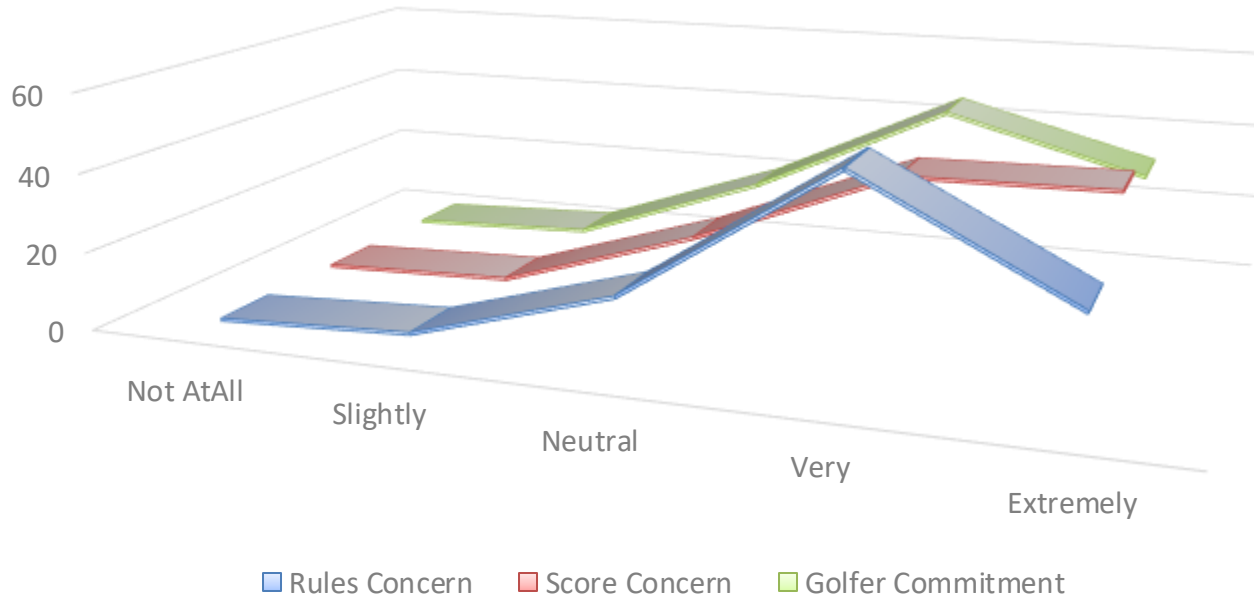
# Psychological

## PHONE USAGE

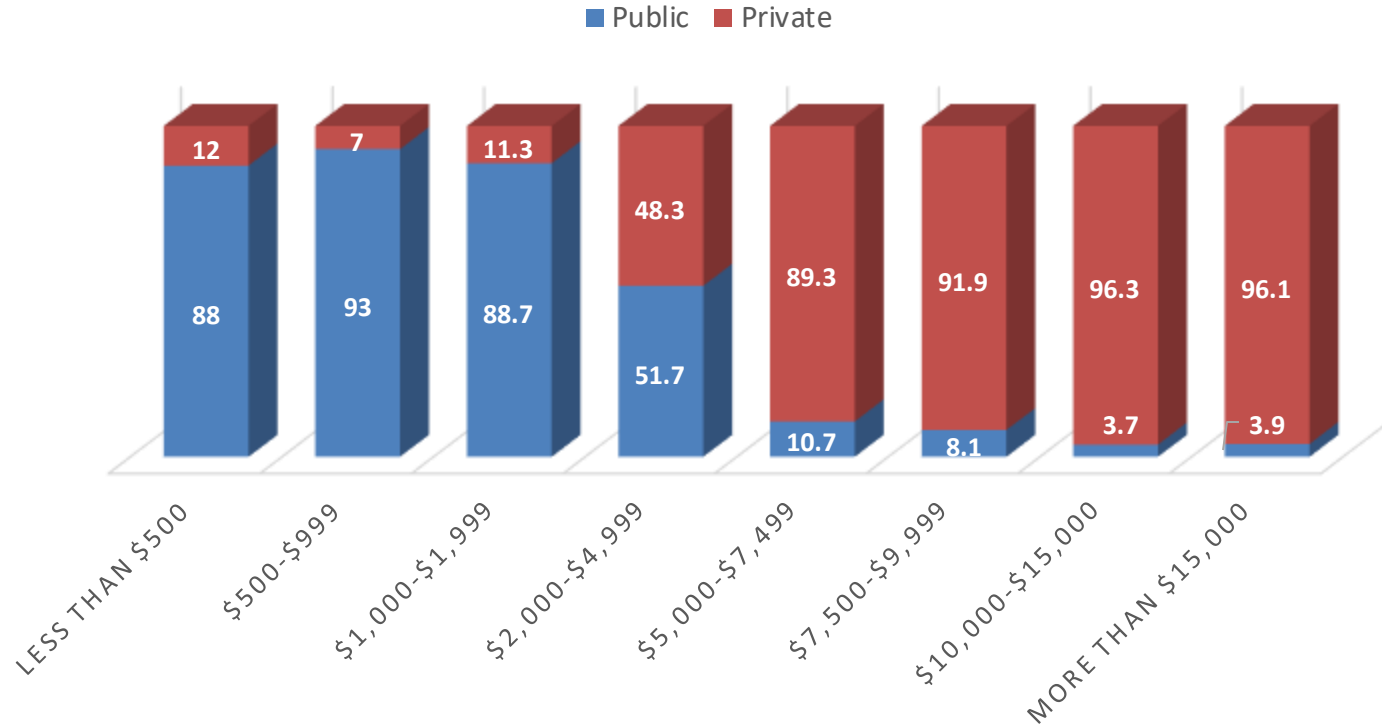




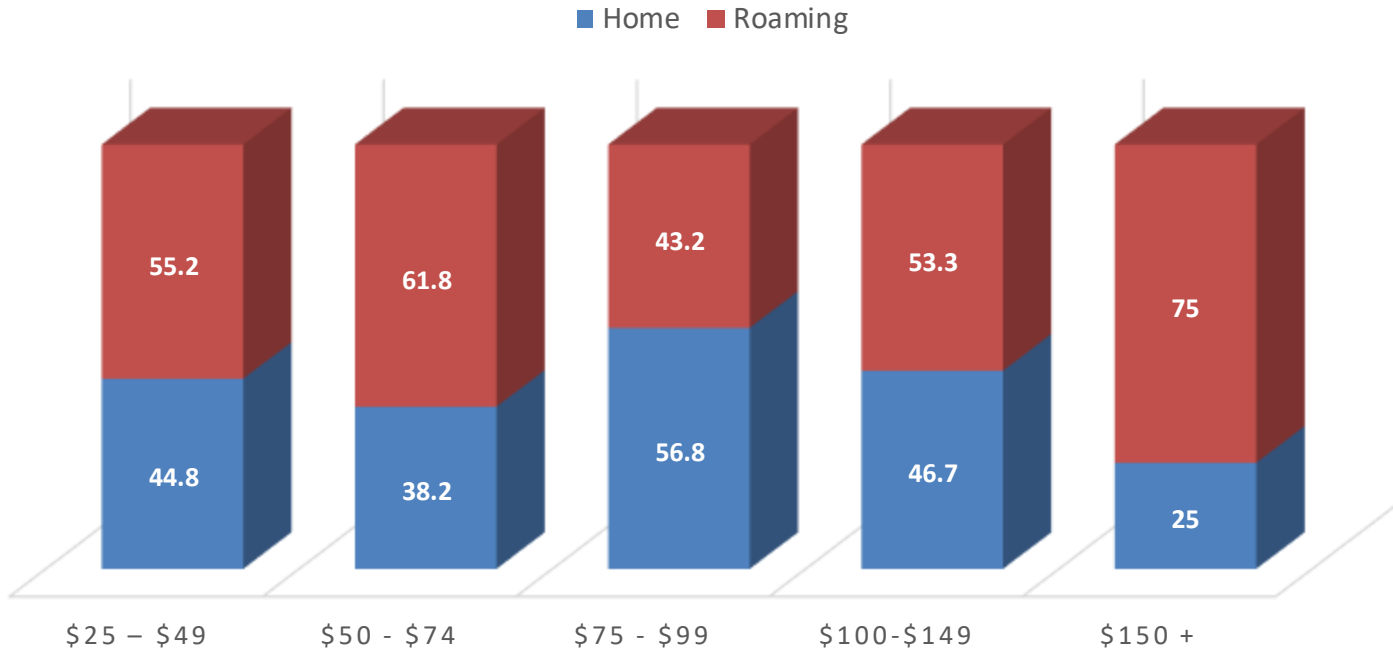
# VIEW OF GOLF



# ANNUAL FEES & MEMBERSHIP



# HOME COURSE & COST COMPARISON

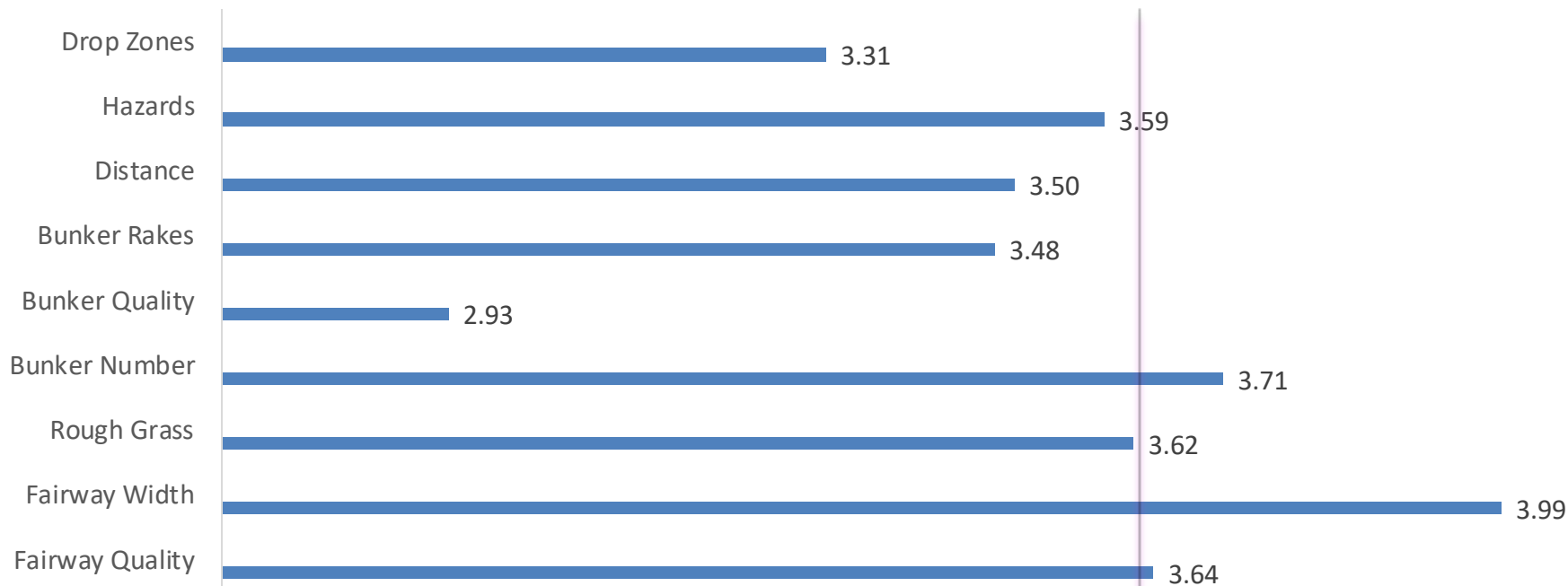


TOUCHPOINT	TOP CHOICE	TOTAL SCORE
Business/professional networking	2.2%	1897
Challenge of the game/improvement	<b>19.4%</b>	<b>9654</b>
Spending time with friends/family	<b>23.9%</b>	8801
Competition against other golfers	3.5%	6744
Entertainment value/fun experience	3.2%	4446
Exercise/physical activity	7.3%	<b>10,246</b>
Escapism/getting away	2.3%	4540
Love of the game	<b>30.8%</b>	9552
Prestige/recognition of association with golf	<b>&lt;1%</b>	<b>1098</b>
Stress reduction	1.8%	4646
Visual beauty/spending time outside	4.8%	<b>10,605</b>

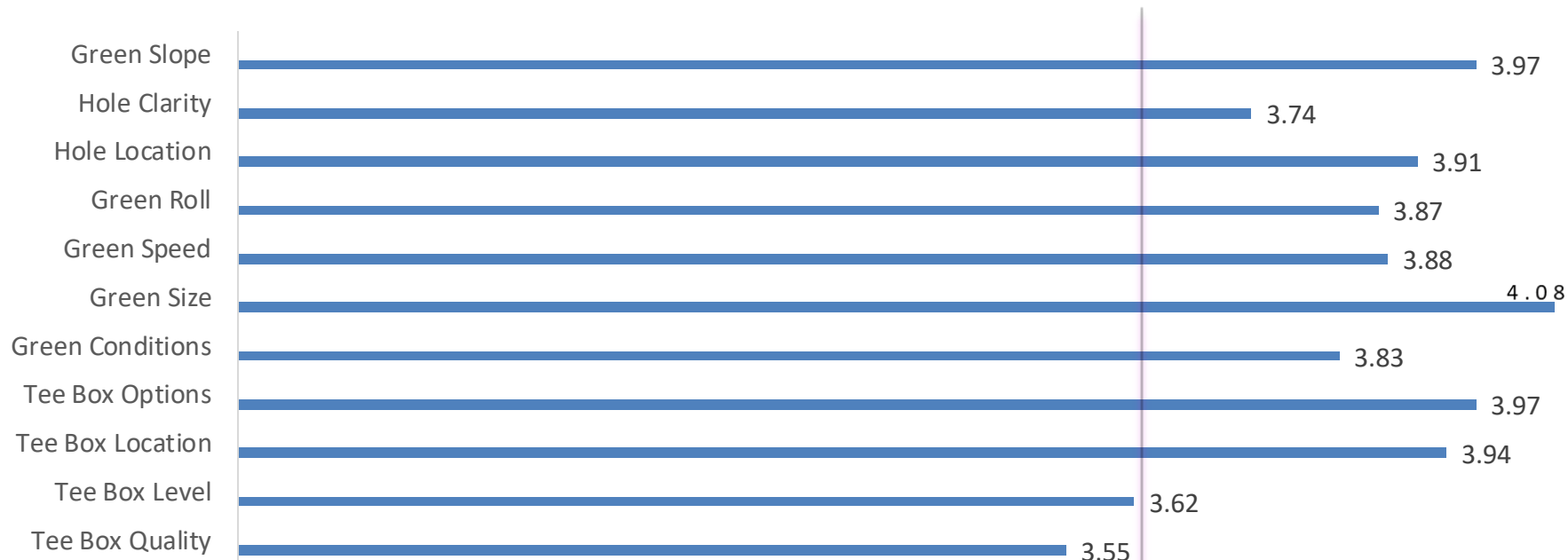
# Course Design



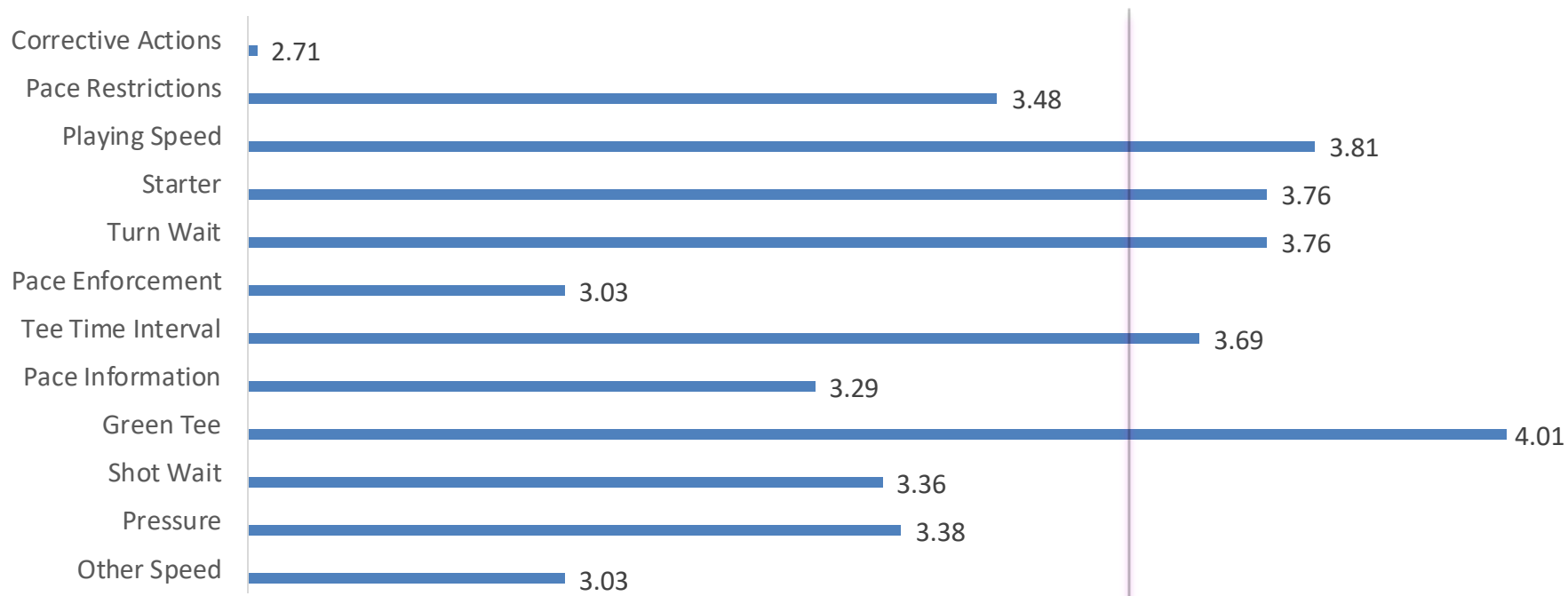
# Fairways, Roughs and Bunkers



# Tees and Greens

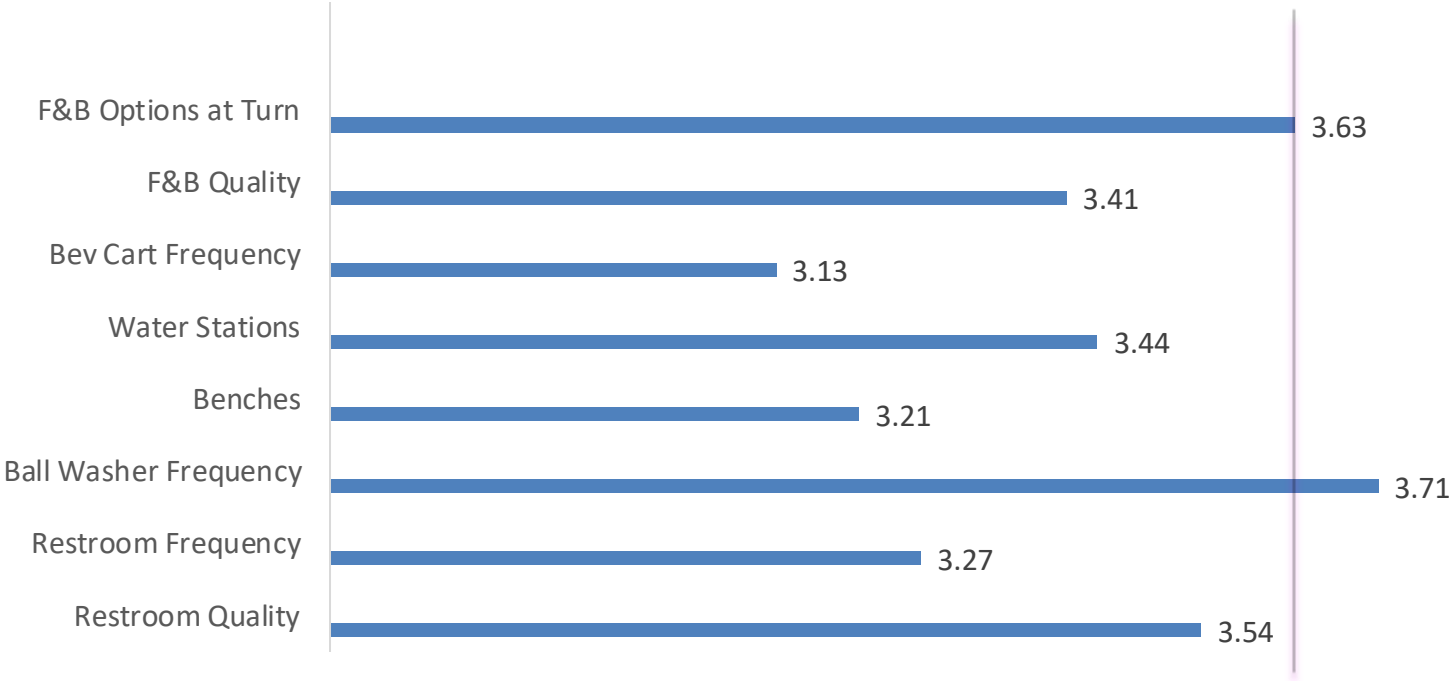


# Pace of Play

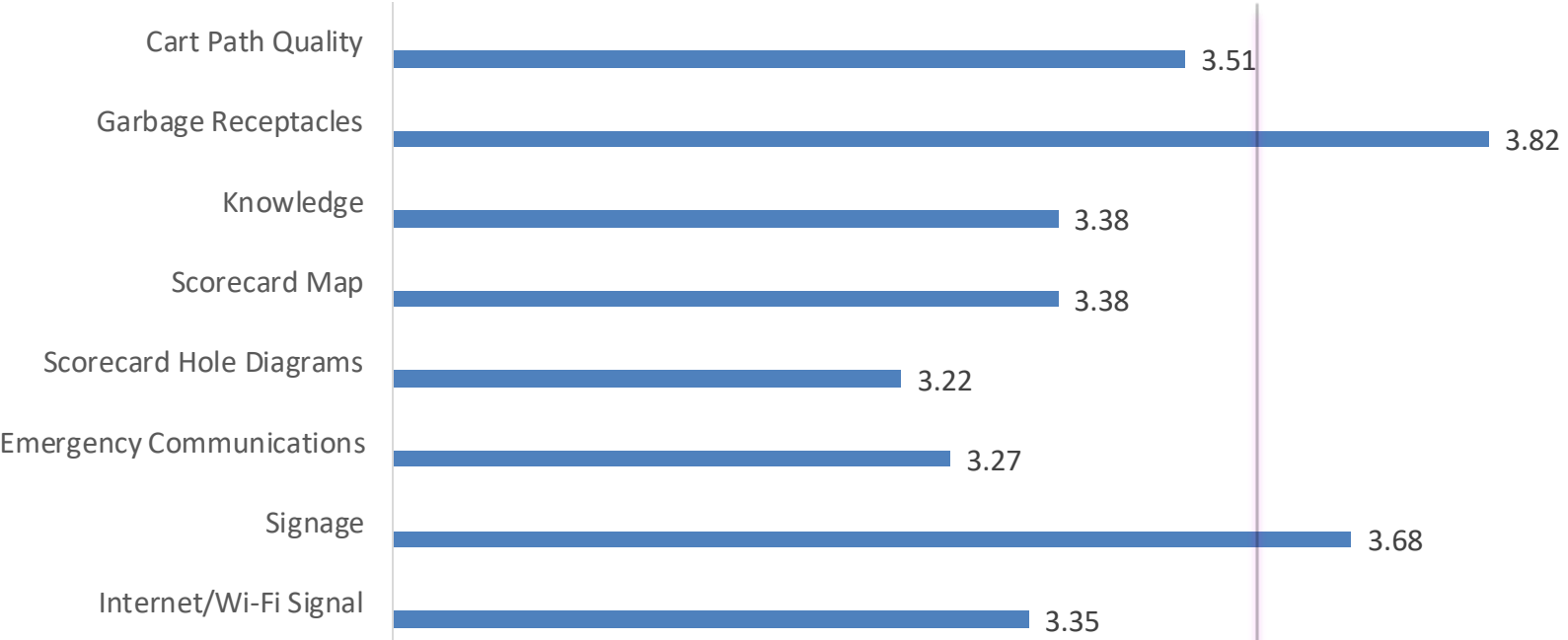




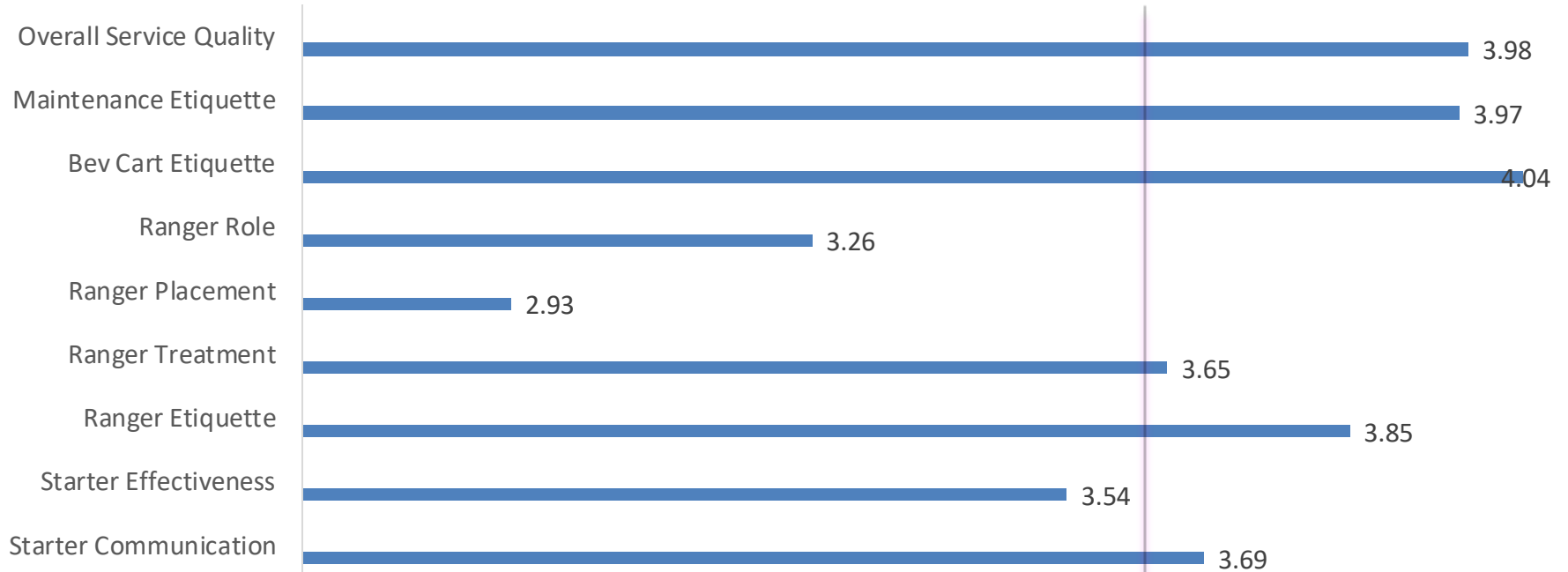
# Services & Features



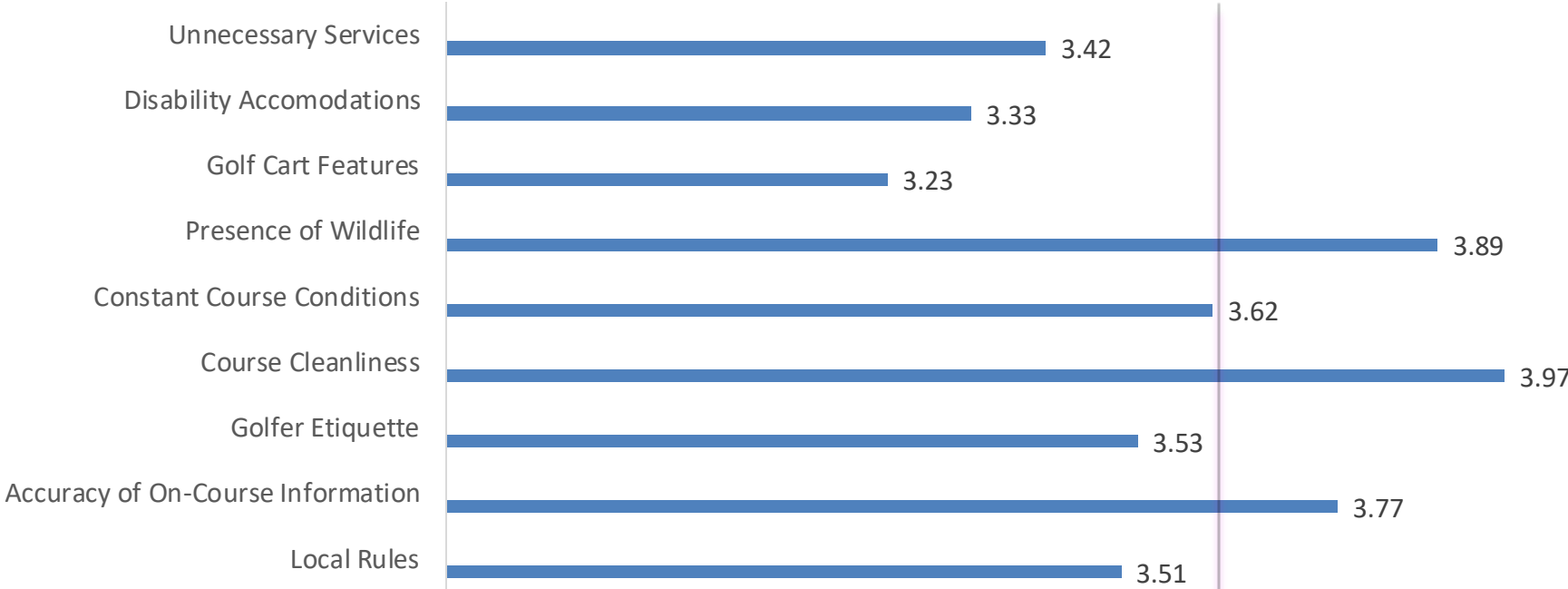
# Services & Features



# Employee Interaction



# General Course Characteristics



# Asymmetry Methodology

- Establishes satisfiers, dissatisfiers, and hybrid
- Regression creates reward index and penalty index
- Calculate satisfaction potential and dissatisfaction potential
- Impact asymmetry statistic for classification

# Satisfiers

TOUCHPOINT	ASYMMETRY SCORE*	FACTOR CATEGORY
Course challenge	0.730	Delighter
Balance of shots	0.380	Satisfier
Fairway width	0.605	Delighter
Number of bunkers	0.627	Delighter
Hazard markings	0.608	Delighter
Tee box location	0.594	Satisfier
Green condition**	0.300	Satisfier

*\*Asymmetry Score is between -1 and 1; only touchpoints with significant standardized coefficients above |.2| are presented*

# Satisfiers

TOUCHPOINT	ASYMMETRY SCORE*	FACTOR CATEGORY
Hole location	0.745	Delighter
Green to tee box	0.965	Delighter
Information concerning pace	0.900	Delighter
Starter's ability to be on time**	0.388	Satisfier
Partner's playing speed	0.304	Satisfier
At-the-turn options	0.434	Satisfier
Location of garbage receptacles	0.358	Satisfier
Cart path quality	0.500	Satisfier

*\*Asymmetry Score is between -1 and 1; only touchpoints with significant standardized coefficients above |.2| are presented*

# Satisfiers

TOUCHPOINT	ASYMMETRY SCORE*	FACTOR CATEGORY
Ranger etiquette	0.966	Delighter
Beverage cart etiquette	0.521	Satisfier
Maintenance etiquette**	0.384	Satisfier
Customer service quality	0.803	Delighter
Other golfer etiquette	0.343	Satisfier
Course cleanliness**	0.482	Satisfier
Practice/course consistency	0.871	Delighter
Wildlife presence	0.794	Delighter

*\*Asymmetry Score is between -1 and 1; only touchpoints with significant standardized coefficients above |.2| are presented*



# Dissatisfiers

TOUCHPOINT	ASYMMETRY SCORE*	FACTOR CATEGORY
Course features	-0.325	Dissatisfier
Balance of shot challenge	-0.756	Frustrater
Bunker quality**	-0.558	Dissatisfier
Drop zone identification	-0.830	Frustrater
Tee box quality	-0.431	Dissatisfier
Tee box levelness	-0.439	Dissatisfier
Other's speed	-1.000	Perfect Frustrater
Corrective actions	-1.000	Perfect Frustrater

*\*Asymmetry Score is between -1 and 1; only touchpoints with significant standardized coefficients above |.2| are presented*

# Dissatisfiers

<b>TOUCHPOINT</b>	<b>ASYMMETRY SCORE*</b>	<b>FACTOR CATEGORY</b>
Water stations	-1.000	Perfect Frustrater
Emergency facilities/communication	-1.000	Perfect Frustrater
Ranger placement	-0.361	Dissatisfier
Role of the ranger	-0.636	Frustrater
Local rules for playability/speed	-0.320	Dissatisfier
Cart features	-0.372	Dissatisfier
Disability accommodations	-1.000	Perfect Frustrater

*\*Asymmetry Score is between -1 and 1; only touchpoints with significant standardized coefficients above |.2| are presented*

# Hybrid Touchpoints

<b>TOUCHPOINT</b>	<b>ASYMMETRY SCORE</b>	<b>TOUCHPOINT</b>	<b>ASYMMETRY SCORE</b>
Walking friendly	0.116	Equitable design	0.055
Fairway quality	0.165	Rough grass	0.183
Length of course	-0.159	Distance	0.286
Tee options	-0.027	Green size	-0.269
Green roll	-0.043	Hole information	0.206
Green undulations	-0.221	Tee time interval	0.169
Pace restrictions	0.163		

# Strategic Implications

- Overall satisfaction
- Satisfaction touchpoints
- Dissatisfaction touchpoints



# Applications









WHAT DO GOLFERS REALLY LOOK LIKE?

# Profile Development

# Thank you!

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5th Golf Innovation Symposium

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