

USGA GOLFER EXPERIENCE RESEARCH AUGUST 2021



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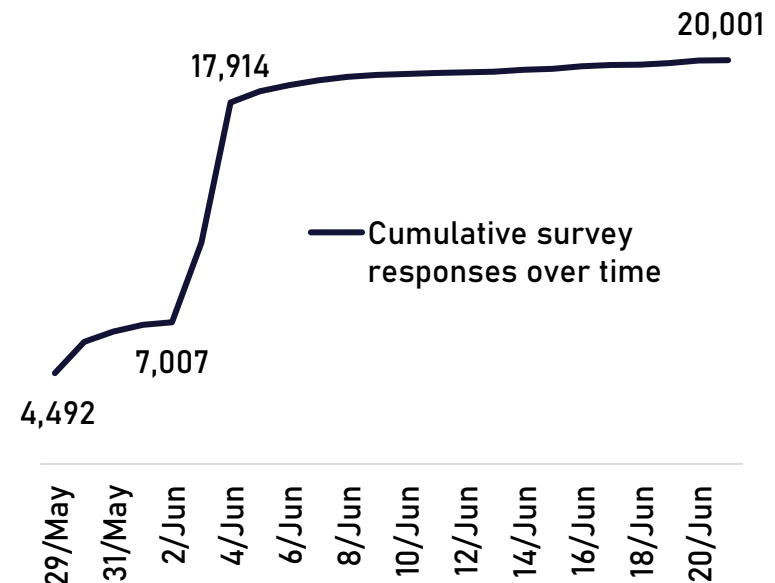
- EXPERIENCE OF FORWARD TEES
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CONTACT DETAILS

“The stated aim of the Golfer Experience program is to deliver research and output that will – over time – mature into industry-wide recommendations designed to best serve and benefit golf courses and golfers everywhere and contribute toward achieving the goals of Distance Insights.”

METHODOLOGY & SAMPLE

- The survey was designed following discussion between the USGA and Sports Marketing Surveys.
 - The survey included questions on a range of topics around the golf experience, opinions and behavior, and tee attitudes and selection.
 - Questions were also included to allow respondents to be allocated to one of the archetypes previously identified as part of the qualitative research. Unlike the qualitative research, gender was not used as a structural component of the segment definitions, and two new archetypes were identified: “Young Athlete” and “Golfertainment”.
 - The survey was limited to residents of the U.S. only.
- The survey was available to complete between May 29 and June 21 and was distributed through five different channels:
 - USGA Member database
 - GolfNow
 - GolfPass
 - Tee Off
 - Topgolf
- In total, 20,001 completed responses were achieved and opinion was gathered from a very broad spectrum of golfers across the U.S.



KEY FINDINGS (i)

FLEXIBILITY & ENJOYMENT

- Even for serious, low handicap golfers, enjoyment is a crucial component of the golf experience.
 - Looking at the most 'serious' of golfer archetypes – Traditionalists and All That / Young Stick – the element of enjoyment is always present alongside a love of golf and the challenge it represents.
- In terms of membership decisions – the convenience of being close to home, an offer of good value for money and having a personal connection with others who play at a venue were the main reasons why a particular club was chosen for membership.
- Conversely a main reason for not being a member of a golf club was not wanting to lose the flexibility of being able to play a range of courses, something that was seen as enjoyable for many non-members and was a strong reason for non-membership amongst younger golfers.

THE ROLE OF OTHERS

- As for enjoyment, the role of friends / playing companions in the golf experience is significant for all types of golfer, but especially for younger or less experienced golfers.
- Many golfers cited golfing with friends or family members as something that would enable a satisfying golf experience, and this factor was also a key theme in defining what a golfer's ideal golf experience would be.
 - The role of others does however have the potential to impact negatively on the golf experience. If less experienced / skilled golfers play with others who are more experienced / skilled, peer pressure or a lack of understanding could mean that they play tees or courses that are too long for them.
- Choosing inappropriate tees because of others in the golfing group could negatively affect pace of play.
 - Pace of play is one of the most important factors in defining a satisfying on-course experience
 - Because pace is so important in having a satisfying round, it's important for golfers to be educated & understand that they can choose different tees from others in their group, while still playing with them.

KEY FINDINGS (ii)

DISTANCE, ACCURACY & SATISFACTION

- Maintaining or minimizing loss of distance and accuracy is generally seen as more important than actively increasing these elements.
 - There was an understanding that hitting distance is linked to age, and that maintaining or minimizing loss of distance was more of a realistic goal than constantly striving to hit shots farther.
- Maintaining / minimizing loss of accuracy was seen as marginally more important than the equivalent for distance.
- The main reasons for not wanting to lose distance or accuracy revolved around golfers wanting to play their best possible game, which was in turn linked to enjoyment.
- The length of a hole in relation to a golfer's hitting distance is a far more important contributor to a satisfying round than the actual length of the course. Golfer satisfaction is strongly linked to factors that make playing the course appropriate to a particular golfer's ability.
 - There was little evidence to suggest that hitting a long shot in itself was a contributor to a satisfying round.
 - Shots would also need to be accurate and general performance would need to be conducive to a good score for the round to be fully satisfying.
- On-course performance is strongly linked to satisfaction, with high handicap and high scoring individuals or those with shorter distance or less accuracy less likely to be satisfied with their typical golf experience.

TEE CONSIDERATION & ATTITUDES

- The research suggests a mismatch between tee attitudes and actual behavior and consideration.
- Many respondents say that people should be able to choose and be able to post scores from the tees that best reflect their hitting distance, and that enjoyment of the game is the most important thing, but there appears still to be a degree of stigma surrounding the forward tees.
 - Many would be influenced by tees rated for gender in their selection, and only half said they would play tees with names that do not identify with.
 - Some mentioned directly that they would never consider 'women's' or 'junior' tees because they were adult men.
 - Two fifths of women who used the forward tees thought the condition of these was normally worse than that of other tees on the course.
- It's very important for all golfer groups to feel they are experiencing the designed strategies of the course from whichever tees they play, which may contribute to a reluctance to play from basic tees on the fairway.
 - Fairway tees could feel like an afterthought or something added to the course outside of what was originally intended, meaning the features of the course could not be fully experienced.
- Very few golfers had heard of tee selection programs. There is some reluctance to accept advice from course staff, so a technological solution such as a specific tee selection program may present an opportunity for golf facilities going forward.

KEY CONCLUSIONS

THE 'WHOLE PACKAGE'

For golfers the 'whole package' is needed for a golf experience to be satisfying and enjoyable. The technical features of a course such as fairway width and hole length could be ideal, but it's just as important for the other elements to be ideal as well - playing with family or friends, the presence of nature and wildlife and availability of food and drink

CHANGING PERCEPTIONS

Enjoyment and satisfaction for golfers is linked to their capacity to tailor their on-course choices appropriately for their level of golf ability and hitting distance. Education that a golfer can still enjoy a round with their group even from different tees, and that stigma around the forward tees can be self-defeating and result in a less positive experience could help golfers to think again about their choices. The potential for 'neutral' advice through a tee selection program or the potential to re-color tees (e.g. to orange, green and silver) or otherwise generically identify tees to break pre-conceived associations could be considered. Any changes should be communicated to all golfers, because tee color assumptions are consistently held across groups.

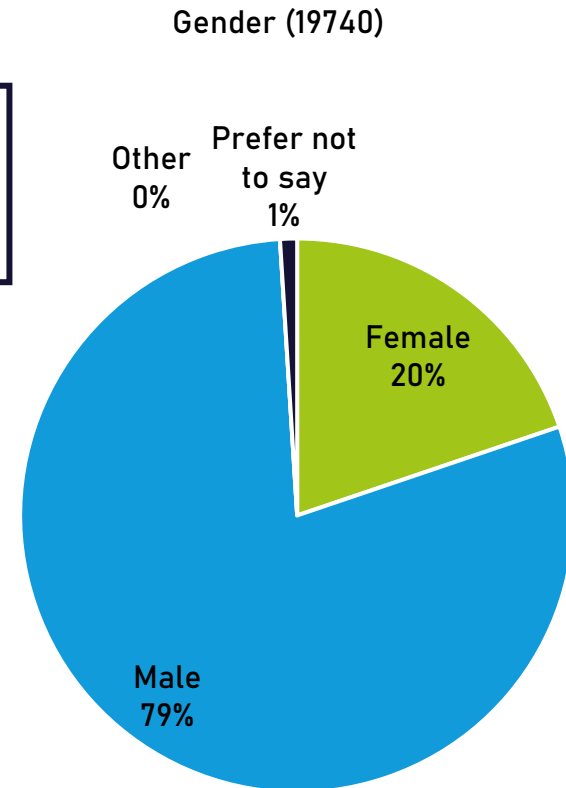
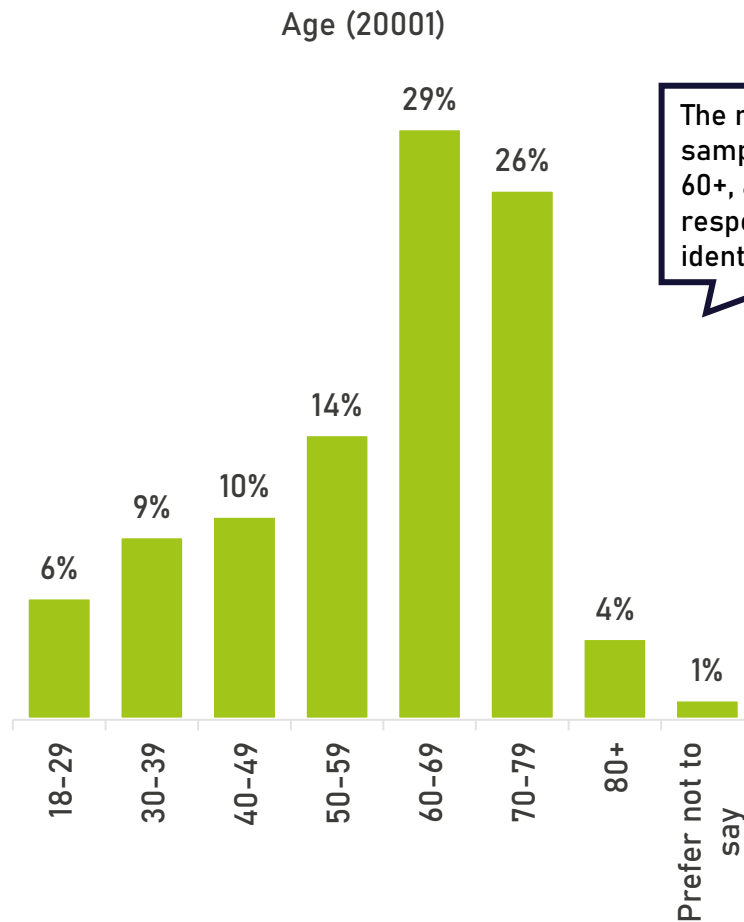
THE FLEXIBLE EXPERIENCE

The research shows that there is a broad spectrum of types of golfers, and a broad spectrum of preferences and behaviors. Flexibility of the golf experience, such as providing a range of structured teeing options, combo tees and flexible membership will help the experience of golf to be as satisfying and engaging as possible for the widest range of golfers.

SAMPLE PROFILE



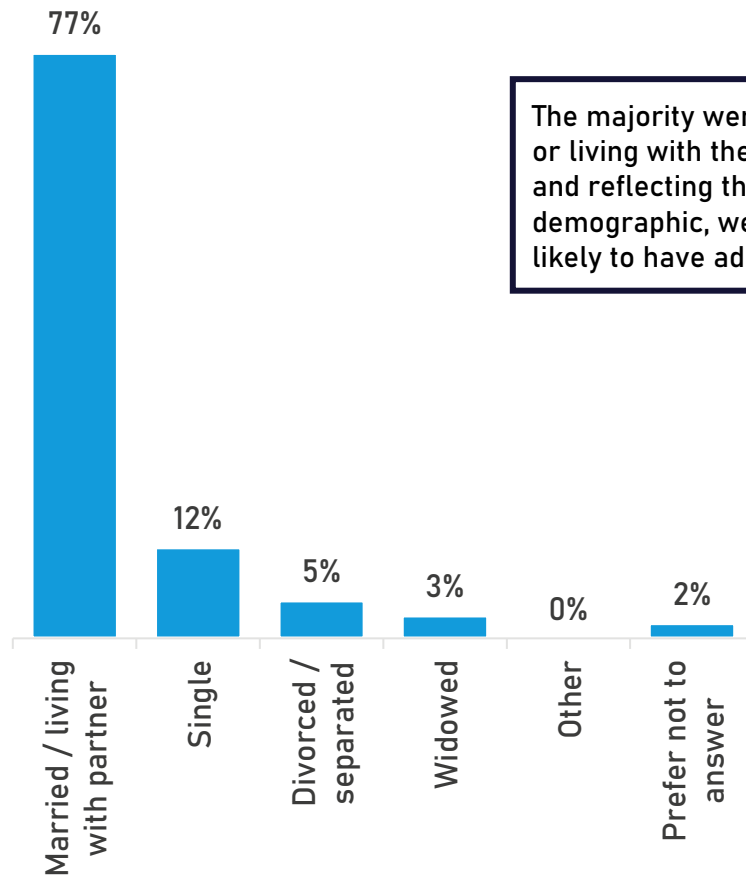
SAMPLE PROFILE | Demographics



Base numbers shown in brackets

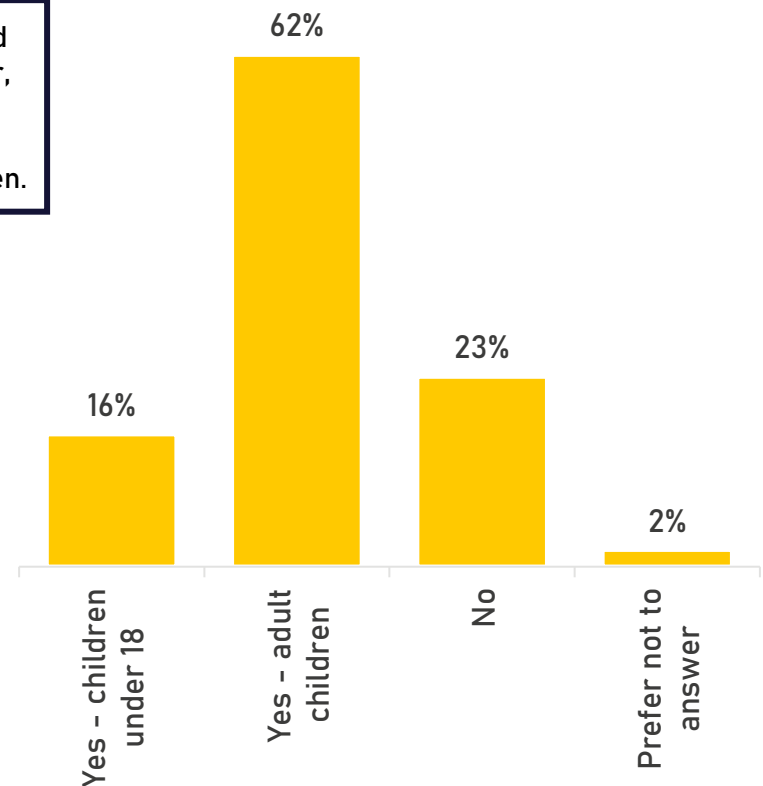
SAMPLE PROFILE | Family situation

Marital status (19941)



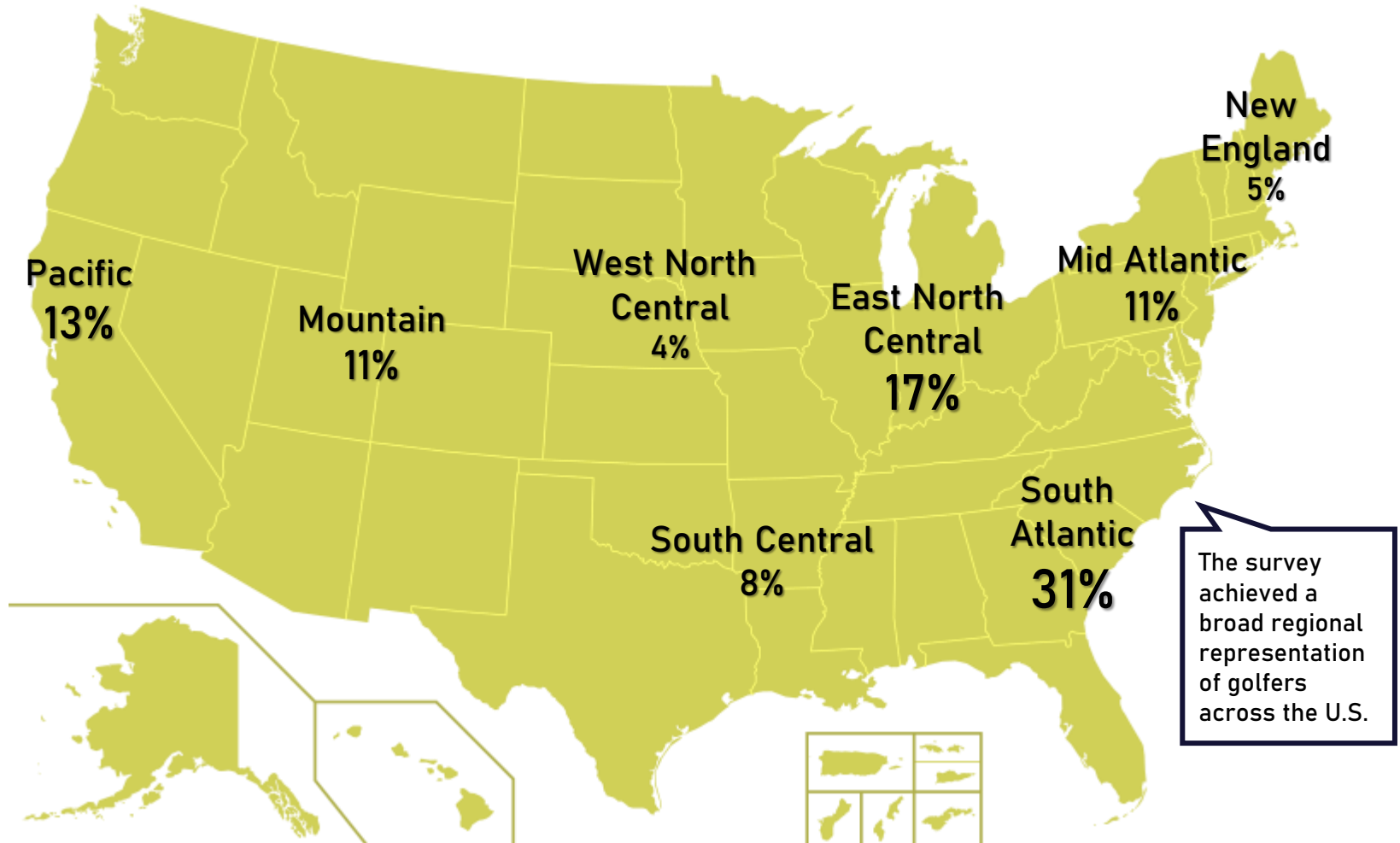
The majority were married or living with their partner, and reflecting the older demographic, were most likely to have adult children.

Do you have children? (19827)



Base numbers shown in brackets

SAMPLE PROFILE | Regional distribution



Base: 20001 – Regions reflect standard NGF regions for golf

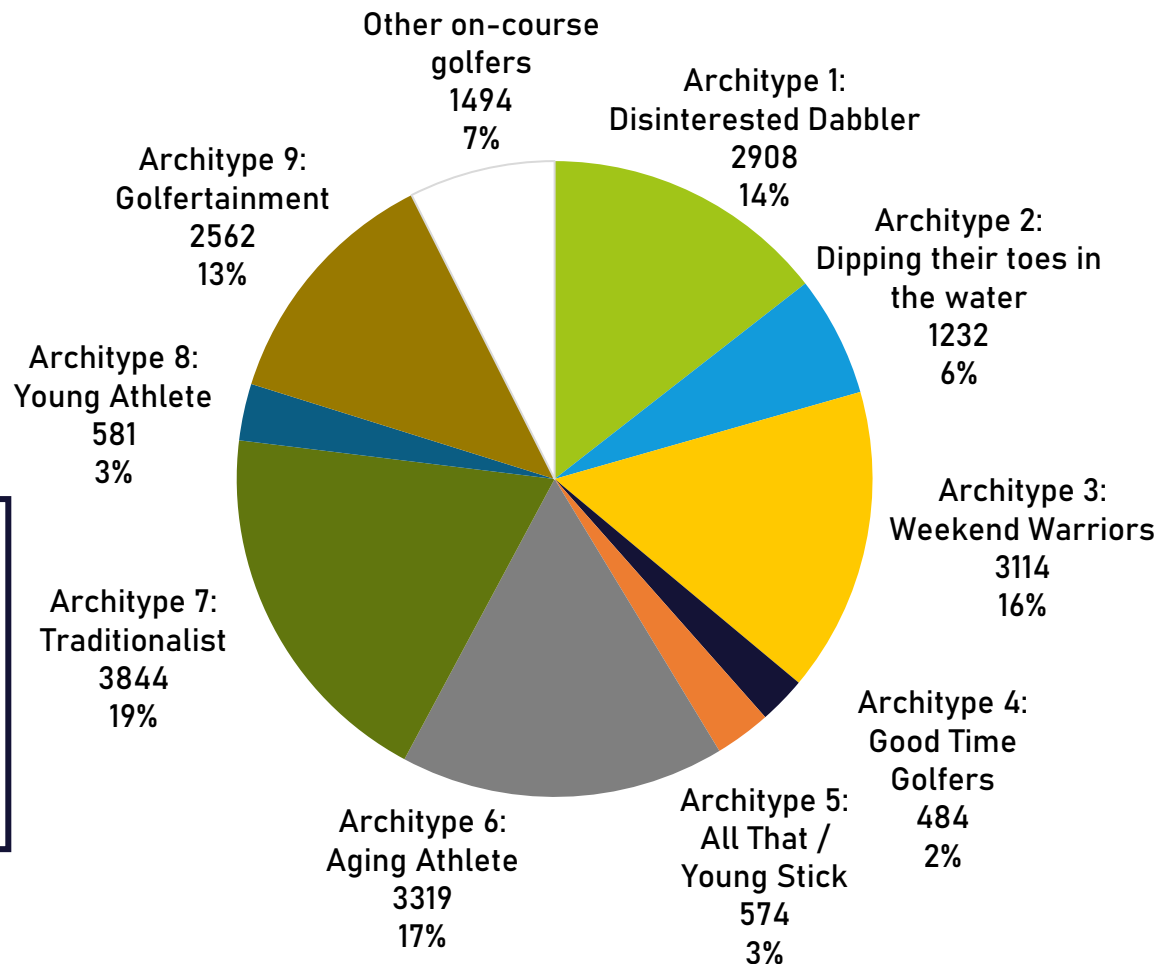
GOLFER EXPERIENCE ARCHITYPES



ARCHITYPES | Architype prevalence



A strong sample was achieved in each of the architype categories. The largest architype was the "Traditionalist", with 3,844 golfers belonging to this group, while the smallest was "Good Time Golfers", with 484 in the group.



ARCHITYPES | Quantitative vs Qualitative comparison

QUALITATIVE DESCRIPTORS (Stage 1)

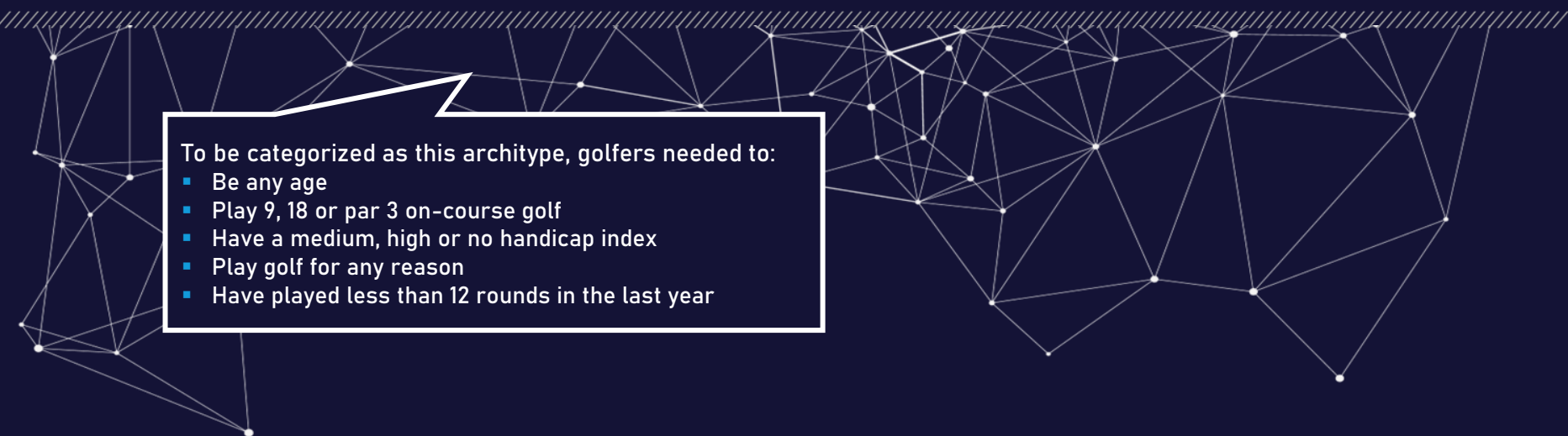
	The Disinterested Dabbler	Dipping Their Toes In the Water	Public Weekend Warriors	Good Time Golf 'Bros'	She's All That	The Aging Athlete	Country Club Traditionalist	Young Stick
Gender	Male or female	Male or female	Male	Male	Female	Male	Male	Male
Facility Type	Public <\$50	Public or golf association	Public—Mix of green fees, more apt to be \$50+	Public <\$50	Private—dues \$5k+ or Public	Public or Golf Association/Private <\$5k	Private—Dues \$5k+ or Public	Private—Dues \$5k+ or Public—Green Fee \$50+

QUANTITATIVE DESCRIPTORS (Stage 2)

	Sample overall	Archetype 1 - Disinterested Dabbler	Archetype 2 - Dipping their toes in the water	Archetype 3 - Weekend Warriors	Archetype 4 - Good Time Golfers	Archetype 5 - All That / Young Stick (u50)	Archetype 6 - Aging Athlete (50+)	Archetype 7 - Traditionalist	Archetype 8 - Young Athlete (u50)	Archetype 9 - Golfentainment
Base	19740	2908	1232	3114	484	574	3319	3844	581	2535
Male	80%	77%	81%	93%	85%	86%	93%	90%	96%	32%
Female	20%	23%	19%	7%	15%	14%	7%	10%	4%	67%
% played <u>most</u> at a private course	19%	8%	7%	27%	19%	15%	16%	31%	6%	-

GOLFER EXPERIENCE ARCHITYPES

DISINTERESTED DABBLER



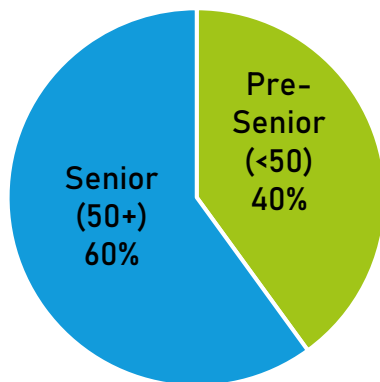
To be categorized as this archetype, golfers needed to:

- Be any age
- Play 9, 18 or par 3 on-course golf
- Have a medium, high or no handicap index
- Play golf for any reason
- Have played less than 12 rounds in the last year

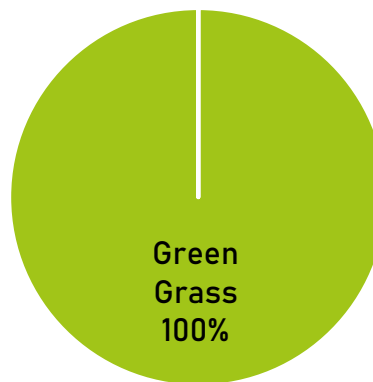
ARCHITYPE ATTRIBUTES | The Disinterested Dabbler

KEY DESCRIPTORS USED TO DEFINE GROUP

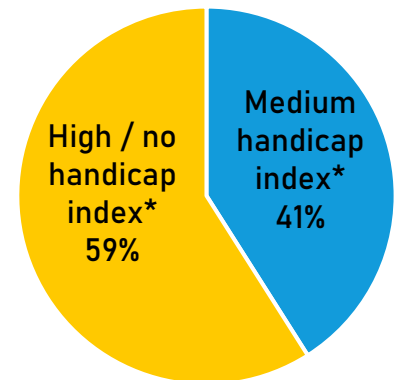
AGE



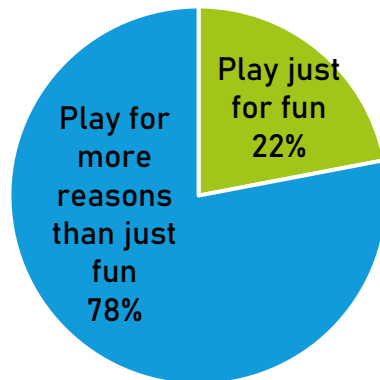
ON/ OFF COURSE



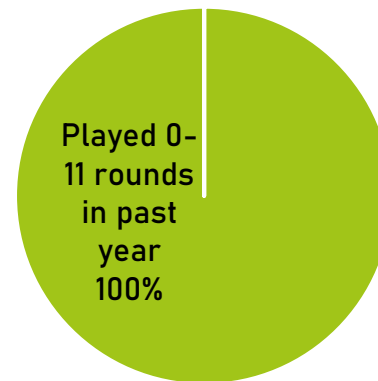
SKILL LEVEL



MOTIVATION



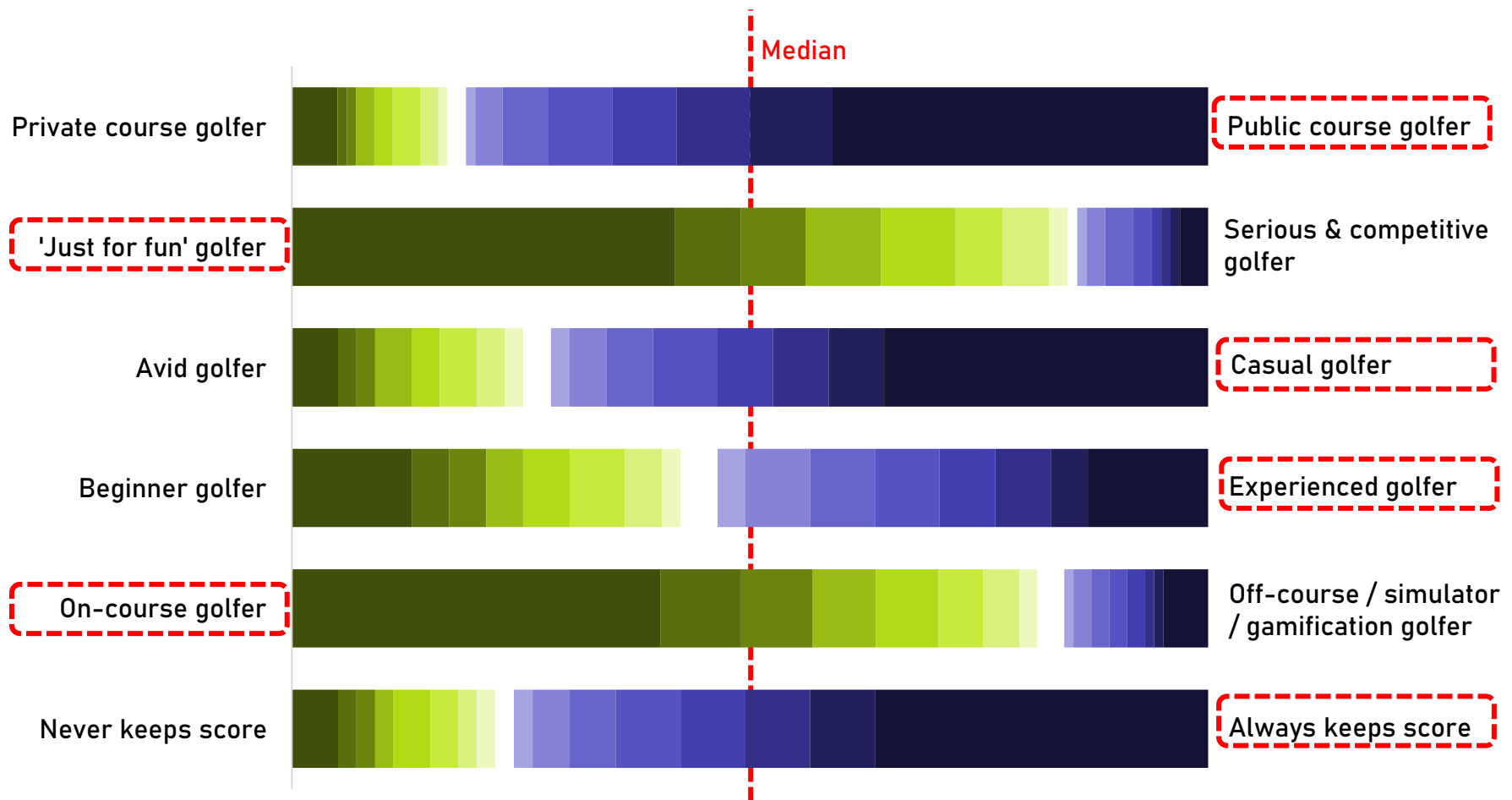
AVIDITY



* Low = Female 20 or better / Male 12 or better, Medium = Female 21-36 / Male 13-28, High = Female 37-54 or no handicap / Male 29-54 or no handicap

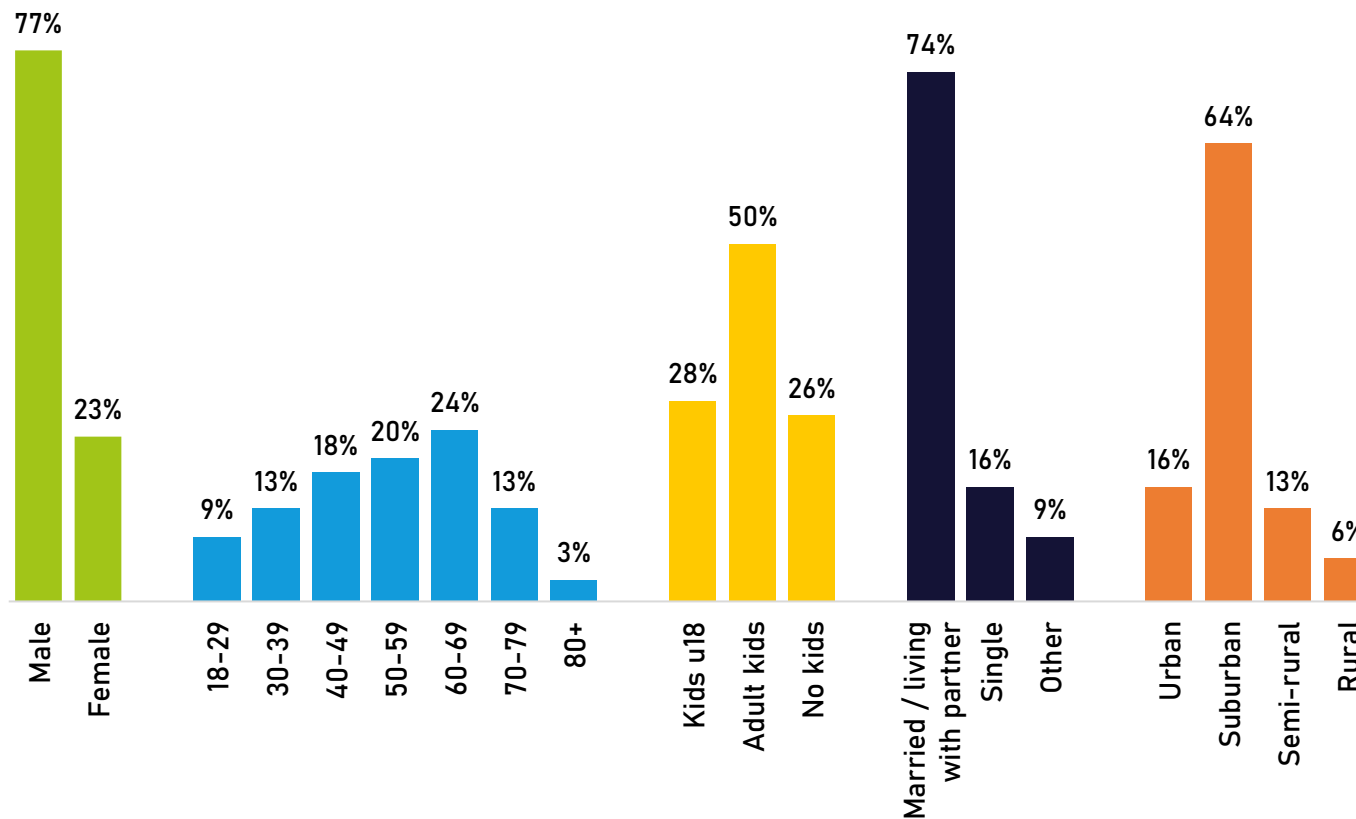
ARCHITYPE ATTRIBUTES | The Disinterested Dabbler

ARCHITYPE ATTITUDES



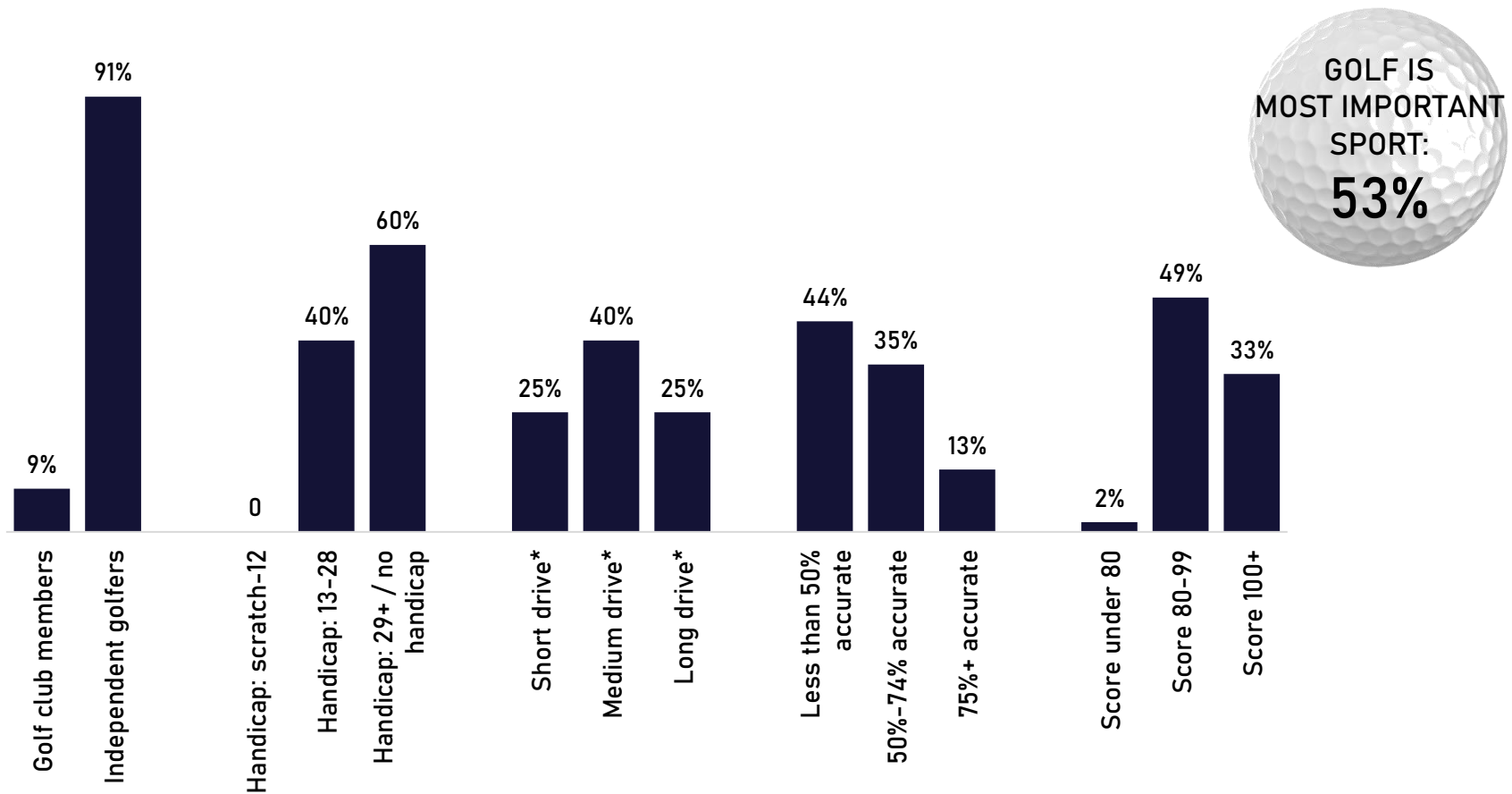
ARCHITYPE ATTRIBUTES | The Disinterested Dabbler

ARCHITYPE FEATURES: DEMOGRAPHICS



ARCHITYPE ATTRIBUTES | The Disinterested Dabbler

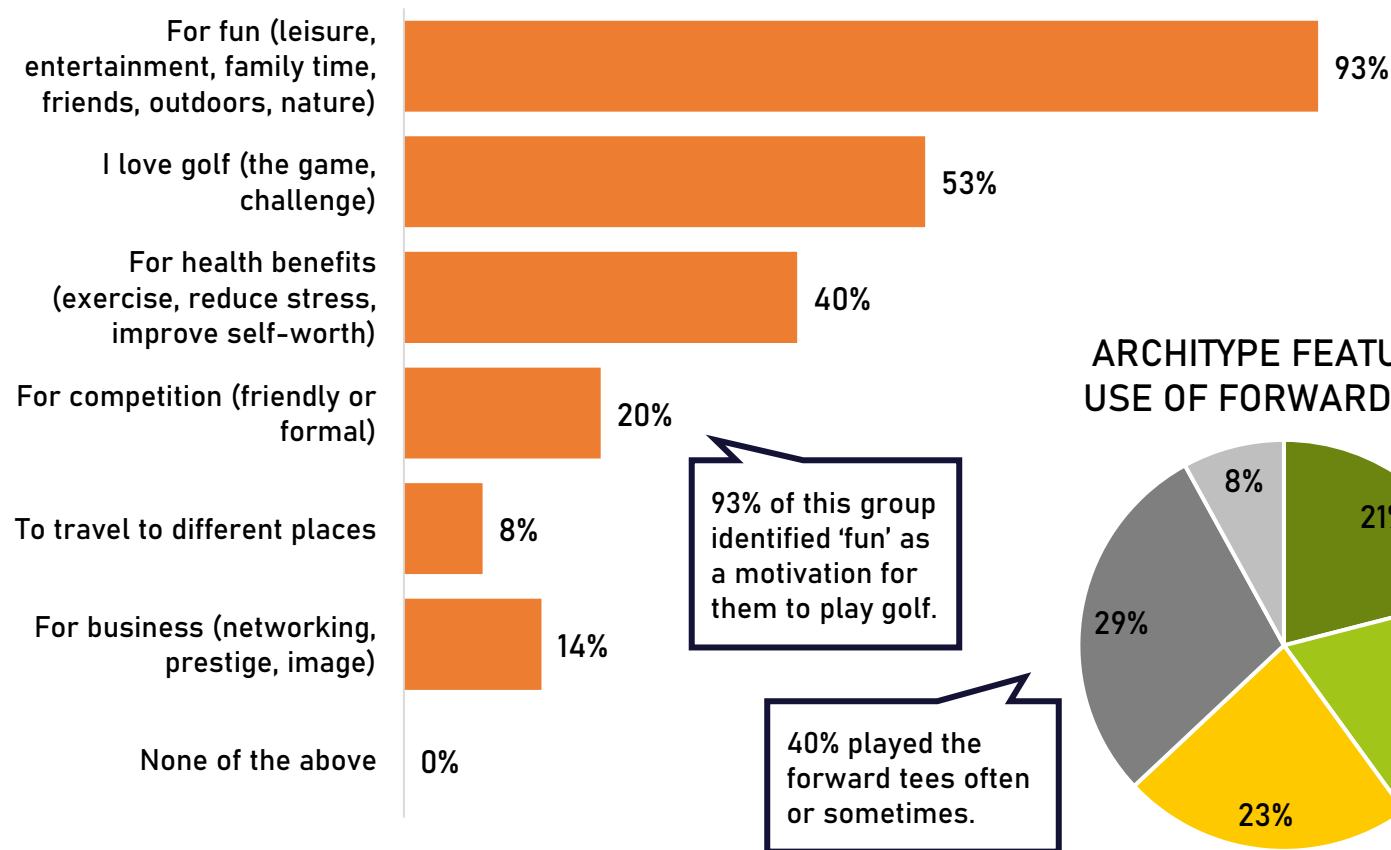
ARCHITYPE FEATURES: GOLF PROFILE



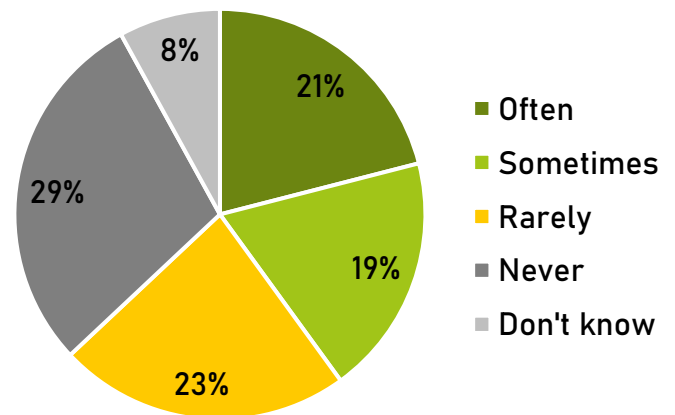
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ARCHITYPE ATTRIBUTES | The Disinterested Dabbler

ARCHITYPE FEATURES: GOLF MOTIVATION



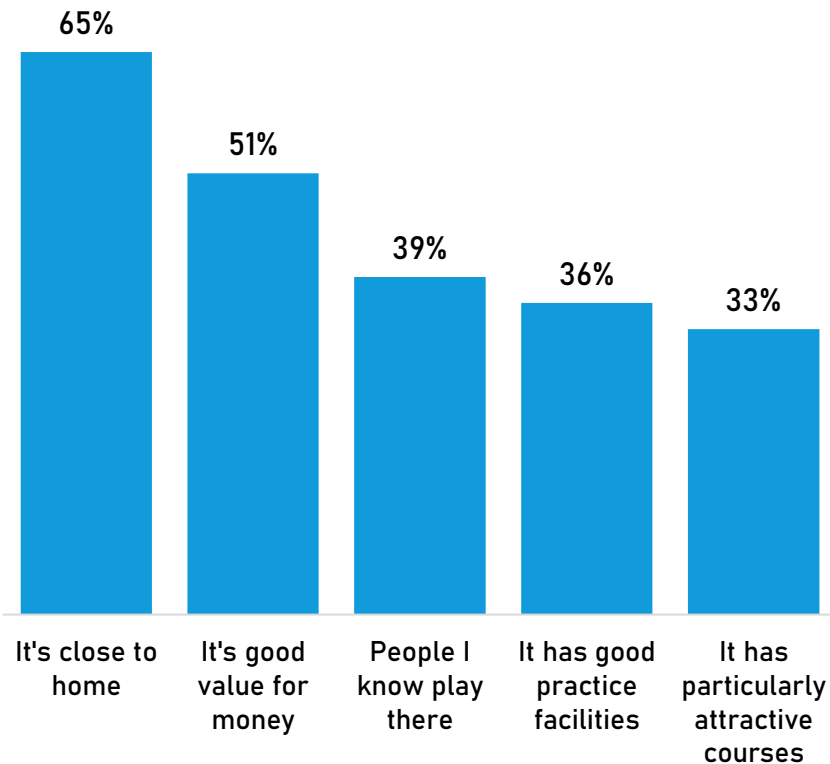
ARCHITYPE FEATURES: USE OF FORWARD TEES



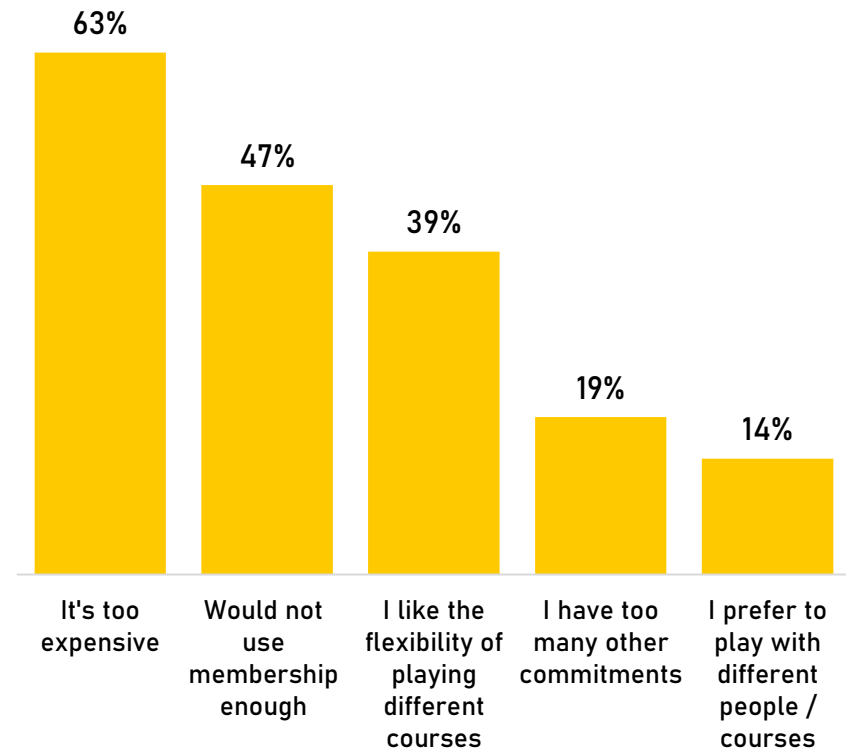
ARCHITYPE ATTRIBUTES | The Disinterested Dabbler

ARCHITYPE FEATURES: REASONS FOR CLUB MEMBERSHIP AND NON-MEMBERSHIP

■ REASONS FOR MEMBERSHIP - TOP 5
Archetype 1 - Disinterested Dabbler (147)



■ REASONS FOR NON-MEMBERSHIP - TOP 5
Archetype 1 - Disinterested Dabbler (1411)



Base numbers shown in brackets

GOLFER EXPERIENCE ARCHITYPES

DIPPING THEIR TOES IN THE WATER

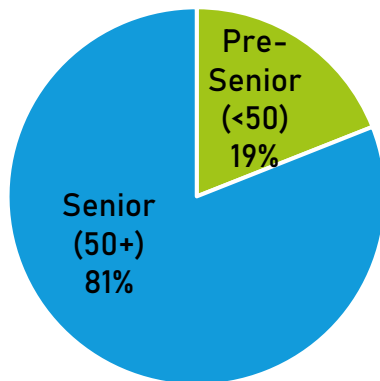
To be categorized as this archetype, golfers needed to:

- Be any age
- Play 9, 18 or par 3 on-course golf
- Have a high handicap or no handicap index
- Play golf for any reason
- Have played between 12 and 52 rounds in the last year

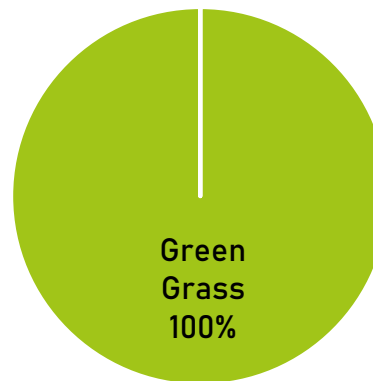
ARCHITYPE ATTRIBUTES | Dipping their toes in the water

KEY DESCRIPTORS USED TO DEFINE GROUP

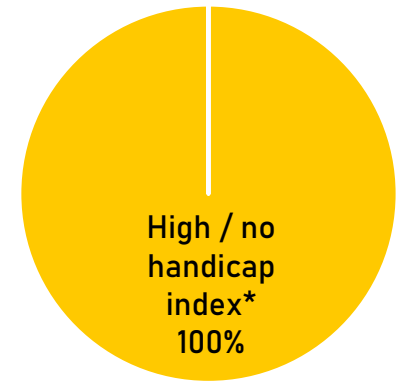
AGE



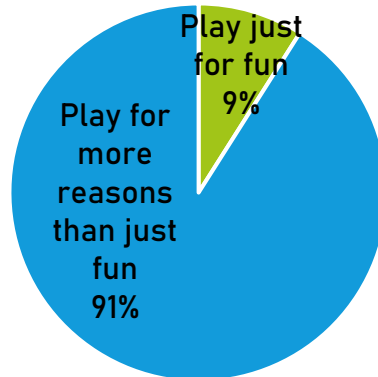
ON/ OFF COURSE



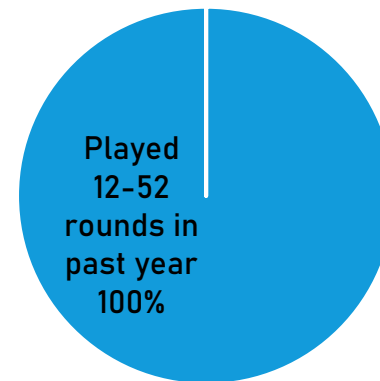
SKILL LEVEL



MOTIVATION



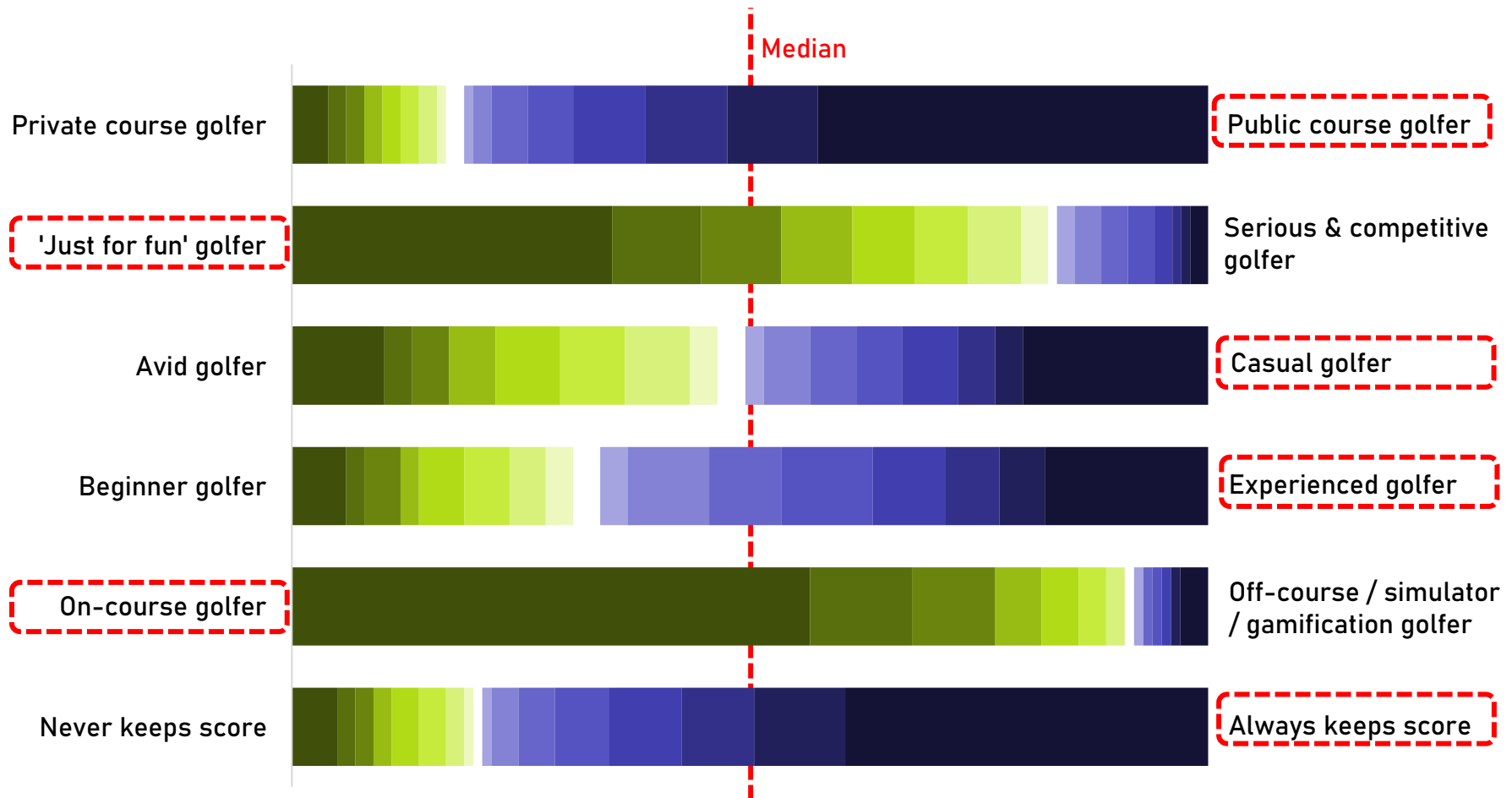
AVIDITY



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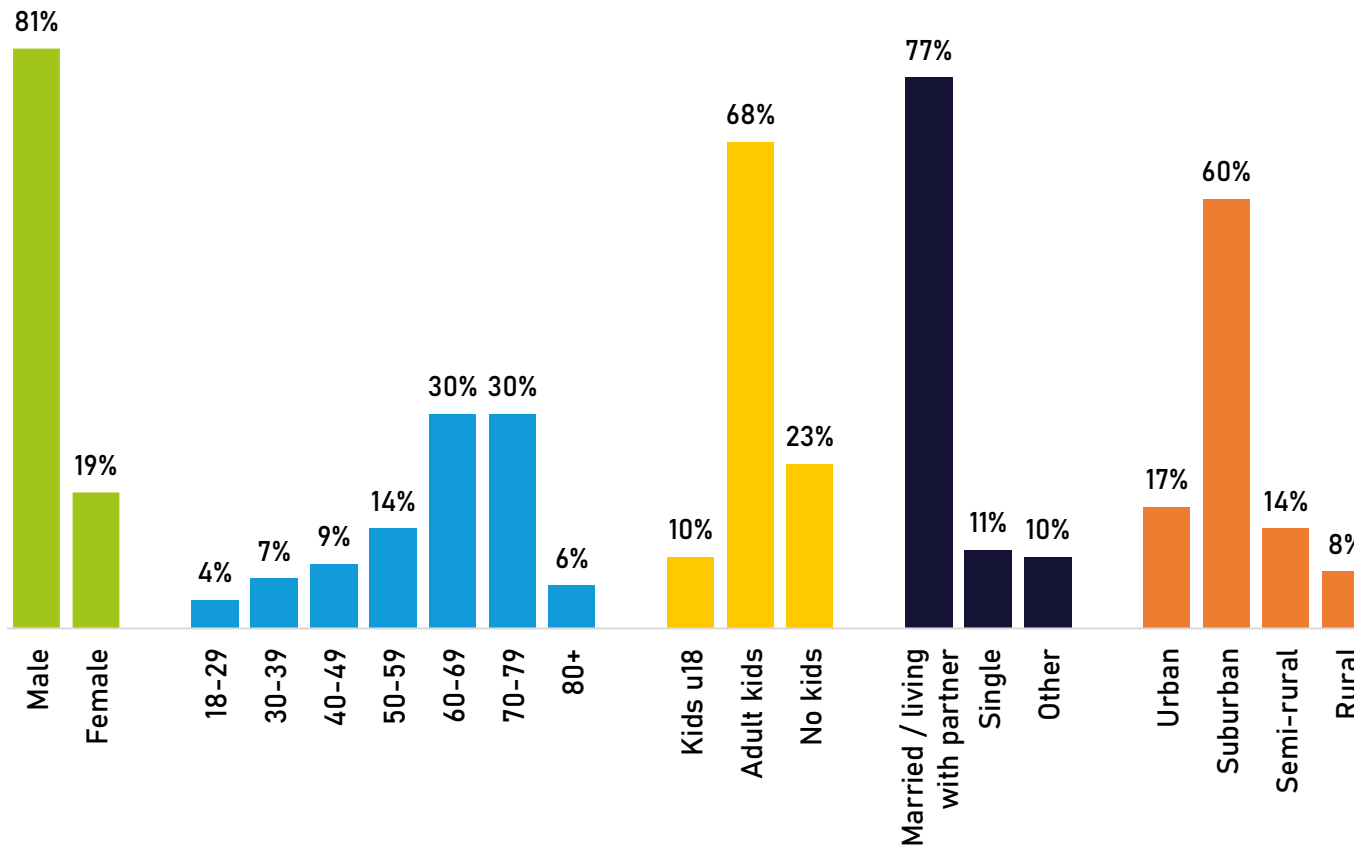
ARCHITYPE ATTRIBUTES | Dipping their toes in the water

ARCHITYPE ATTITUDES



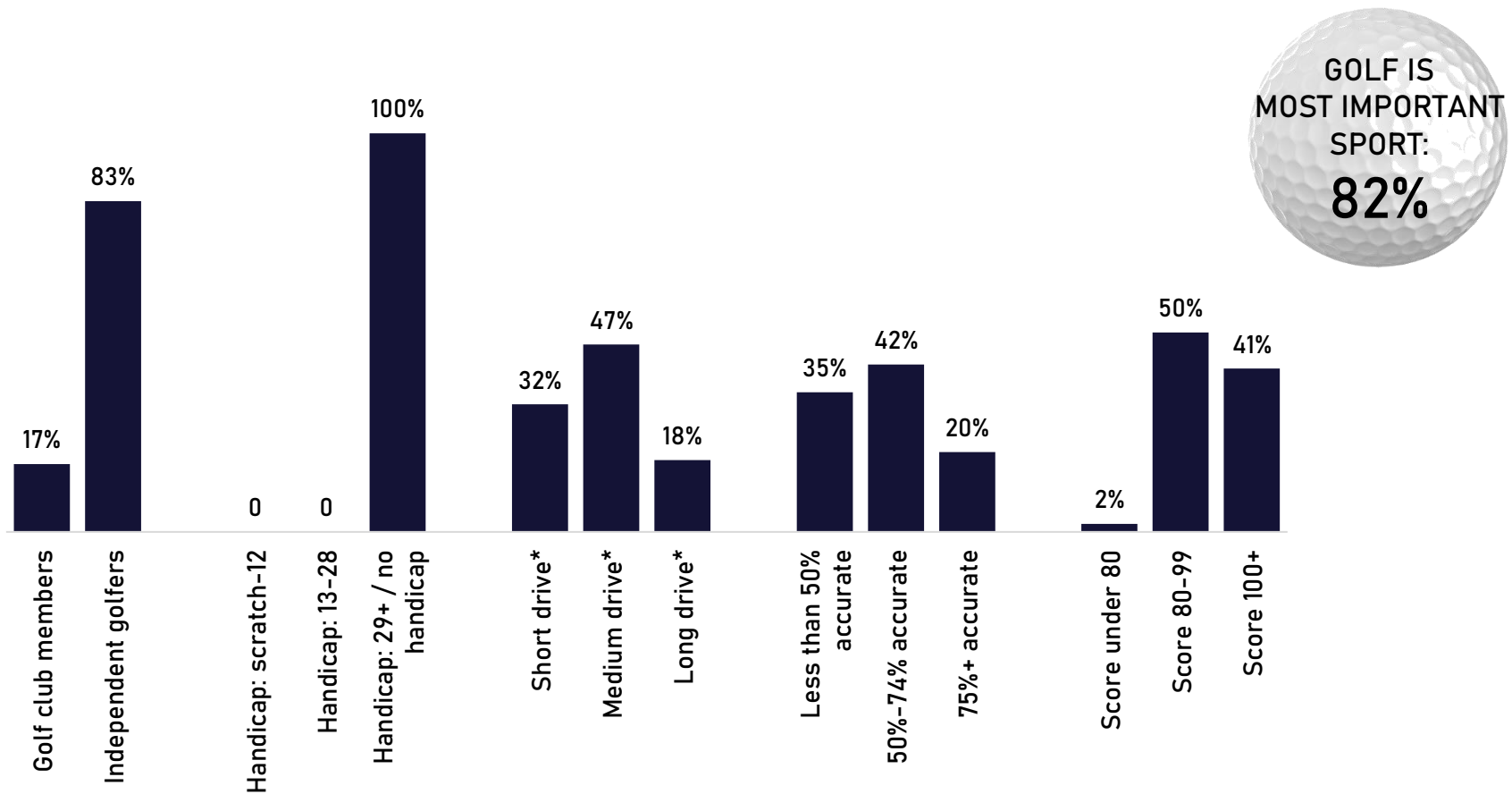
ARCHITYPE ATTRIBUTES | Dipping their toes in the water

ARCHITYPE FEATURES: DEMOGRAPHICS



ARCHITYPE ATTRIBUTES | Dipping their toes in the water

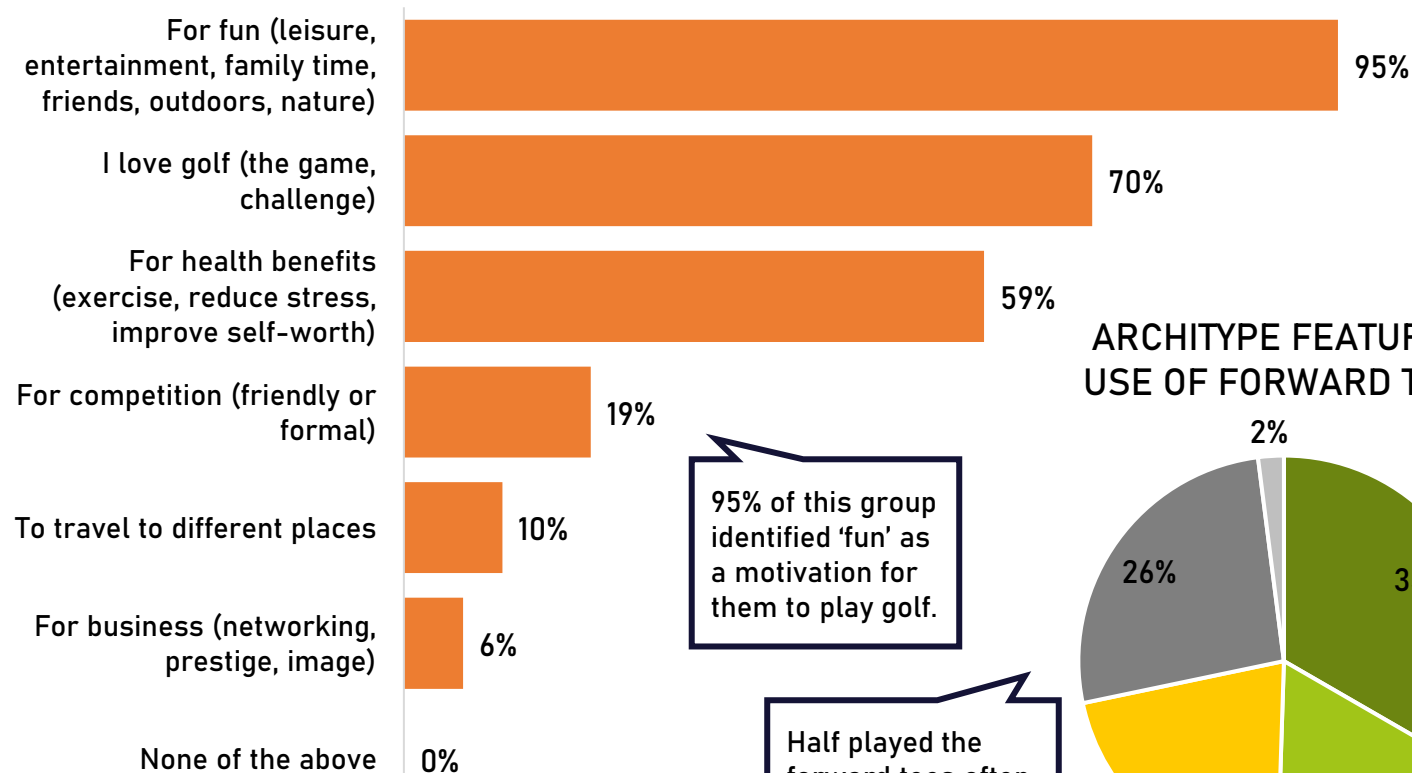
ARCHITYPE FEATURES: GOLF PROFILE



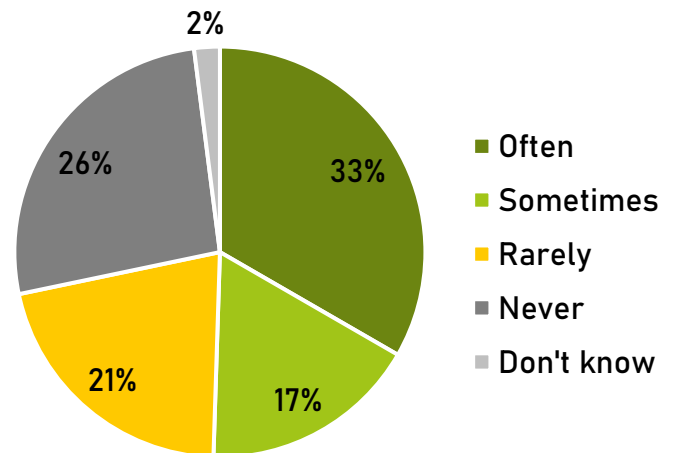
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ARCHITYPE ATTRIBUTES | Dipping their toes in the water

ARCHITYPE FEATURES: GOLF MOTIVATION



ARCHITYPE FEATURES: USE OF FORWARD TEES

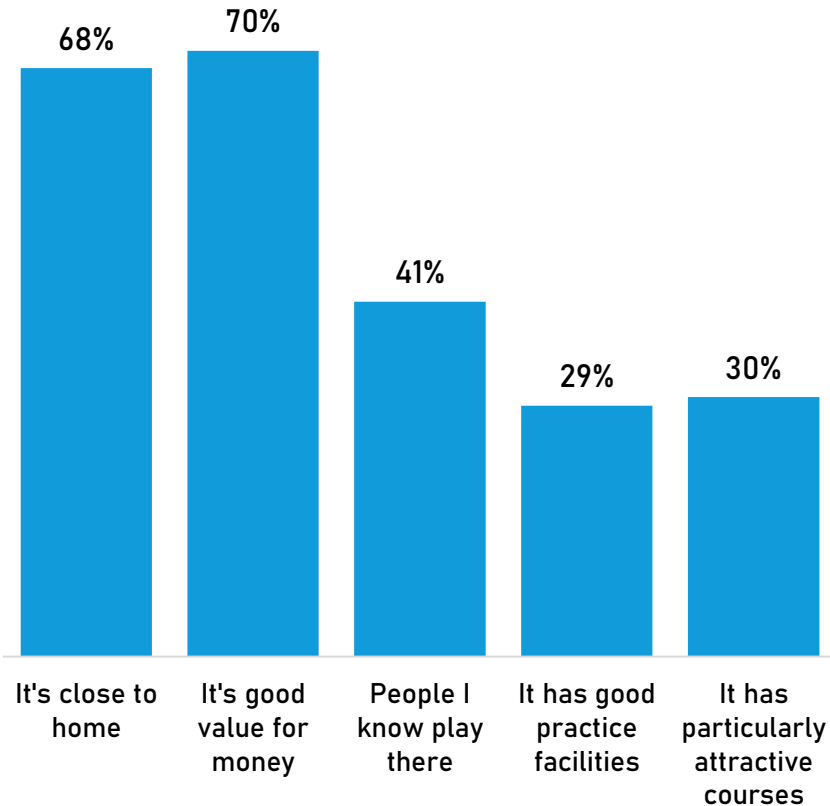


ARCHITYPE ATTRIBUTES | Dipping their toes in the water

ARCHITYPE FEATURES: REASONS FOR CLUB MEMBERSHIP AND NON-MEMBERSHIP

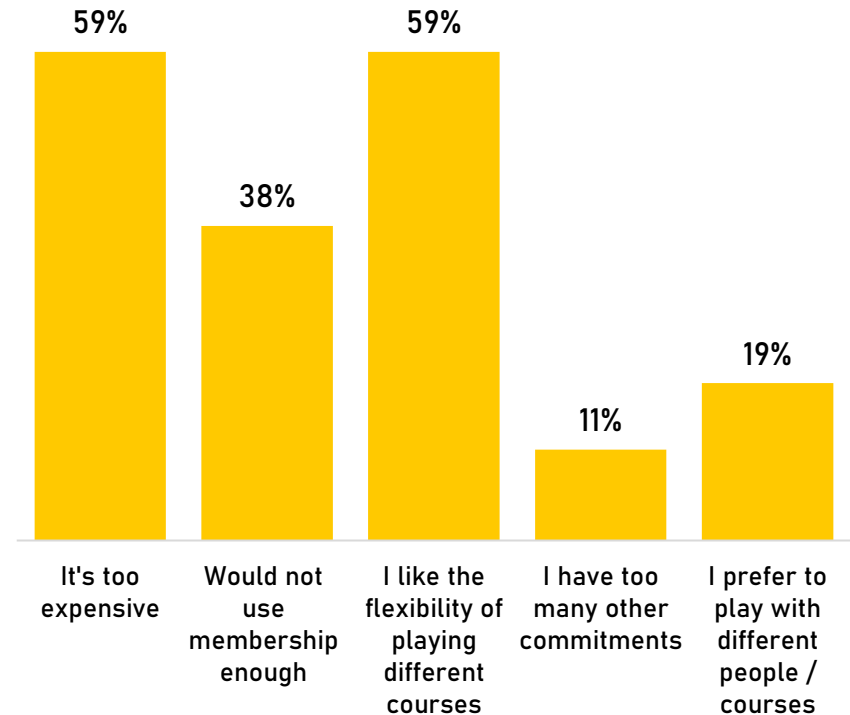
REASONS FOR MEMBERSHIP - TOP 5

Archetype 2 - Dipping their toes in the water (128)



REASONS FOR NON-MEMBERSHIP - TOP 5

Archetype 2 - Dipping their toes in the water (664)



Base numbers shown in brackets

GOLFER EXPERIENCE ARCHITYPES

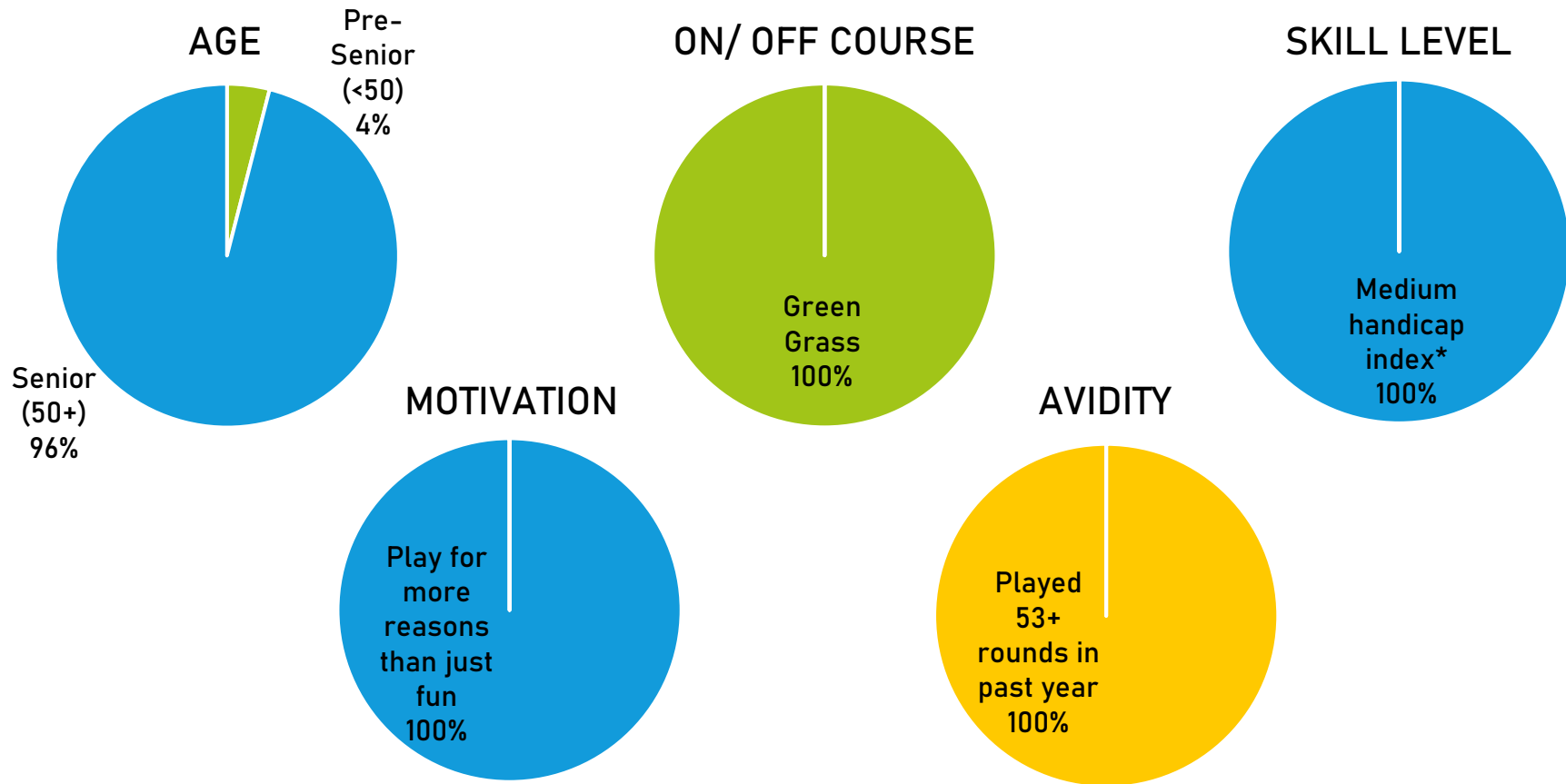
WEEKEND WARRIORS

To be categorized as this archetype, golfers needed to:

- Be any age
- Play 9, 18 or par 3 on-course golf
- Have a medium handicap index
- Play golf for more reasons than only “fun”
- Have played more than 52 rounds in the last year

ARCHITYPE ATTRIBUTES | Weekend Warriors

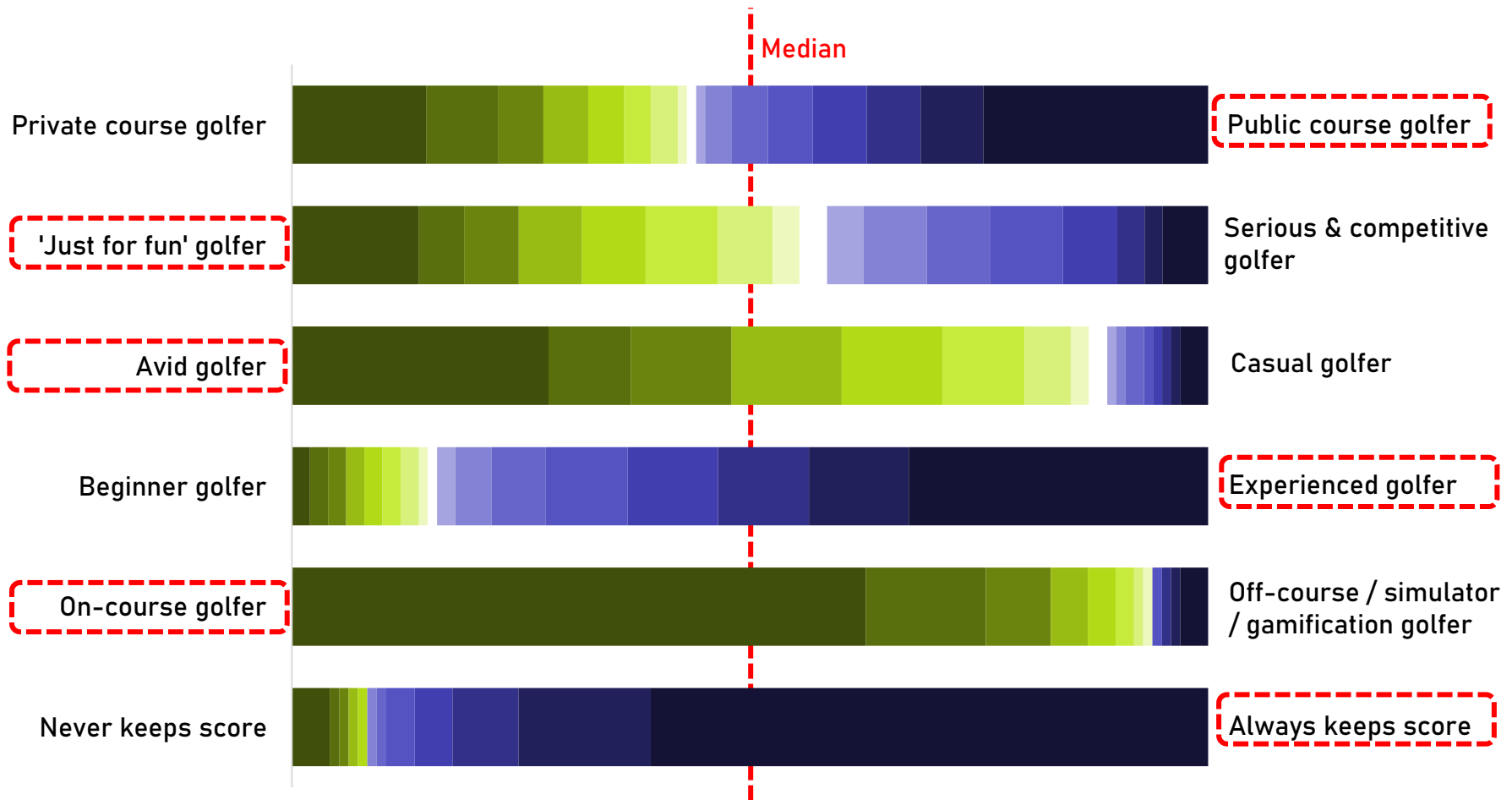
KEY DESCRIPTORS USED TO DEFINE GROUP



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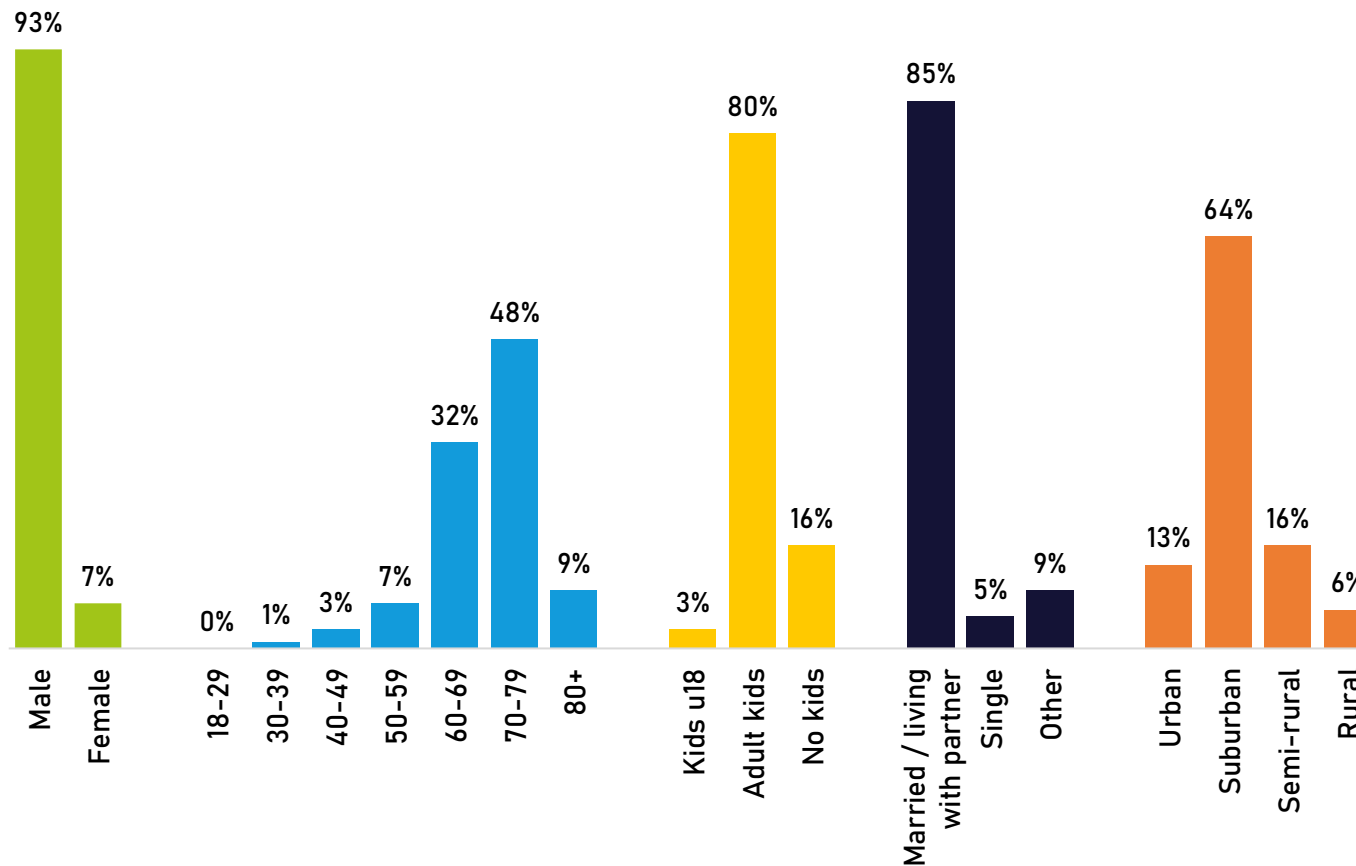
ARCHITYPE ATTRIBUTES | Weekend Warriors

ARCHITYPE ATTITUDES



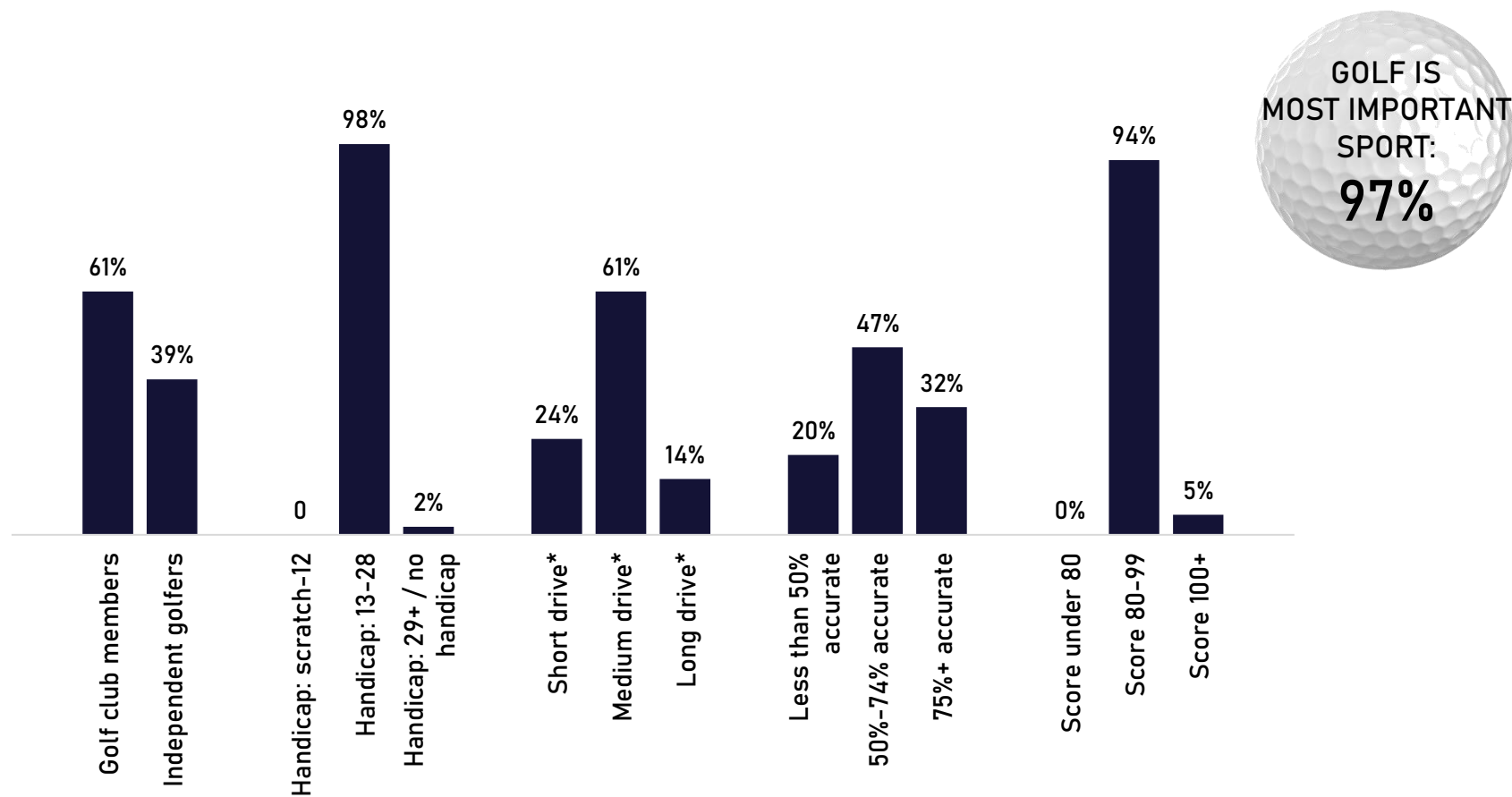
ARCHITYPE ATTRIBUTES | Weekend Warriors

ARCHITYPE FEATURES: DEMOGRAPHICS



ARCHITYPE ATTRIBUTES | Weekend Warriors

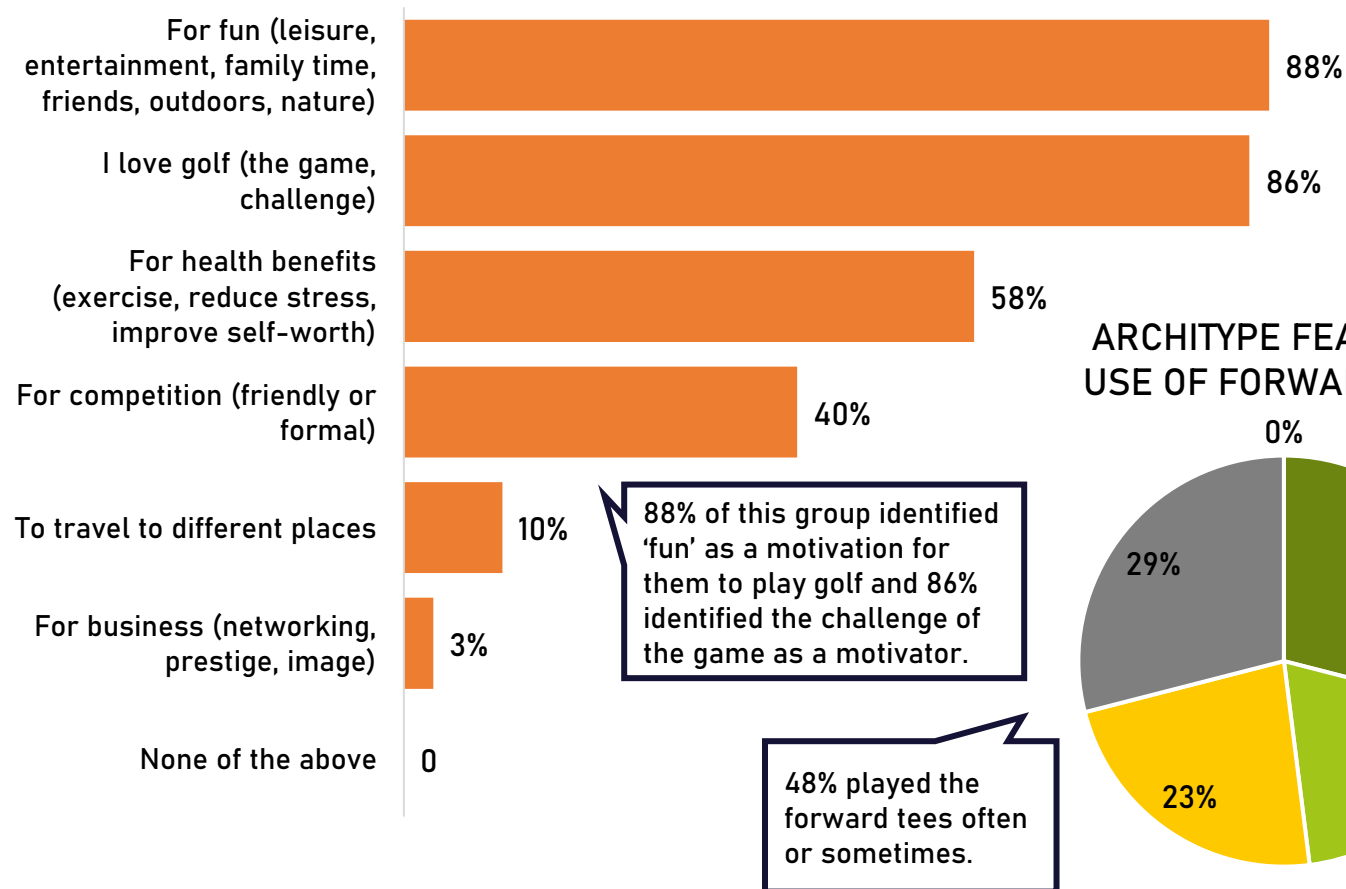
ARCHITYPE FEATURES: GOLF PROFILE



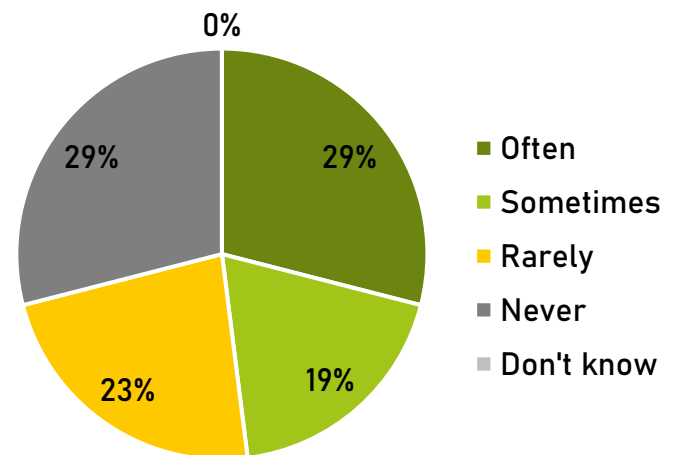
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ARCHITYPE ATTRIBUTES | Weekend Warriors

ARCHITYPE FEATURES: GOLF MOTIVATION

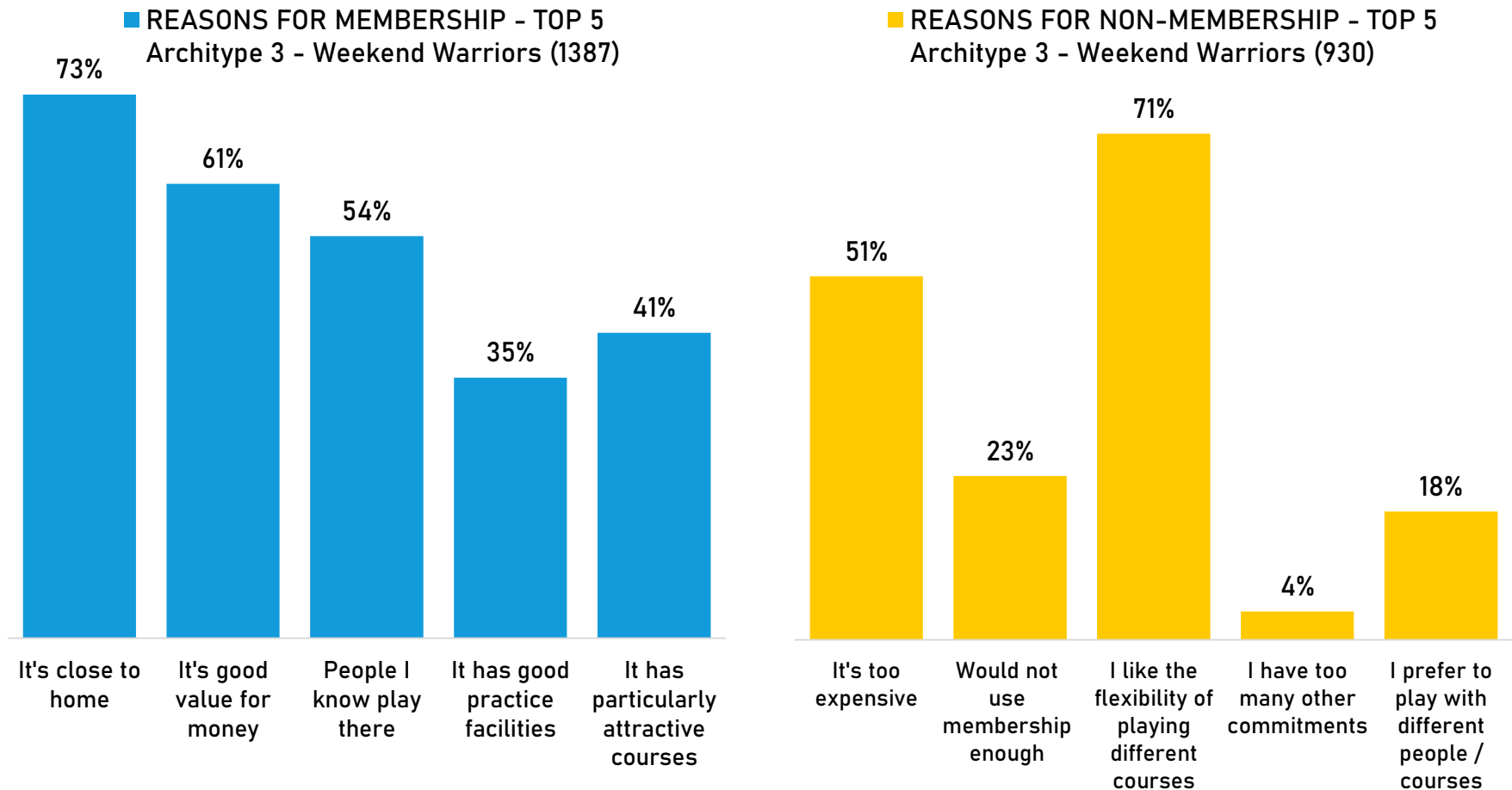


ARCHITYPE FEATURES: USE OF FORWARD TEES



ARCHITYPE ATTRIBUTES | Weekend Warriors

ARCHITYPE FEATURES: REASONS FOR CLUB MEMBERSHIP AND NON-MEMBERSHIP



Base numbers shown in brackets

GOLFER EXPERIENCE ARCHITYPES

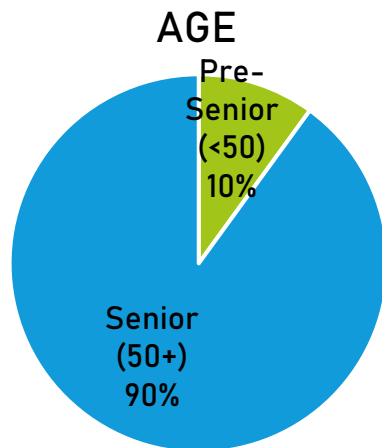
GOOD TIME GOLFERS

To be categorized as this archetype, golfers needed to:

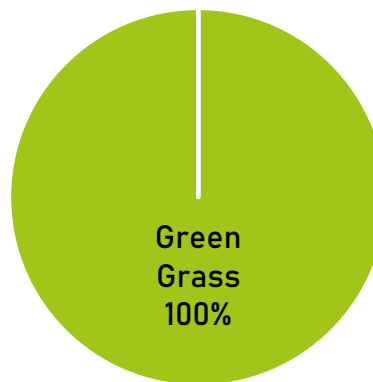
- Be any age
- Play 9, 18 or par 3 on-course golf
- Have a medium, high or no handicap index
- Play golf *only* for “fun”
- Have played 12 rounds or more in the last year

ARCHITYPE ATTRIBUTES | Good Time Golfers

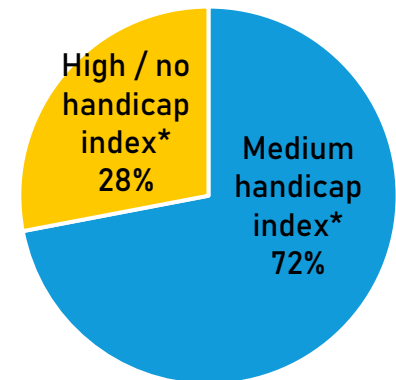
KEY DESCRIPTORS USED TO DEFINE GROUP



ON/ OFF COURSE



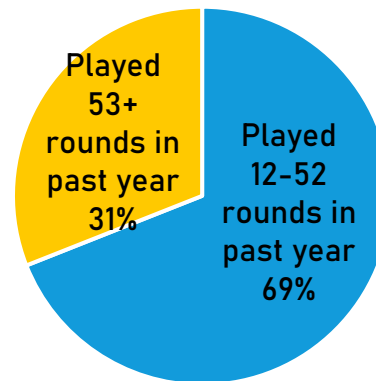
SKILL LEVEL



MOTIVATION



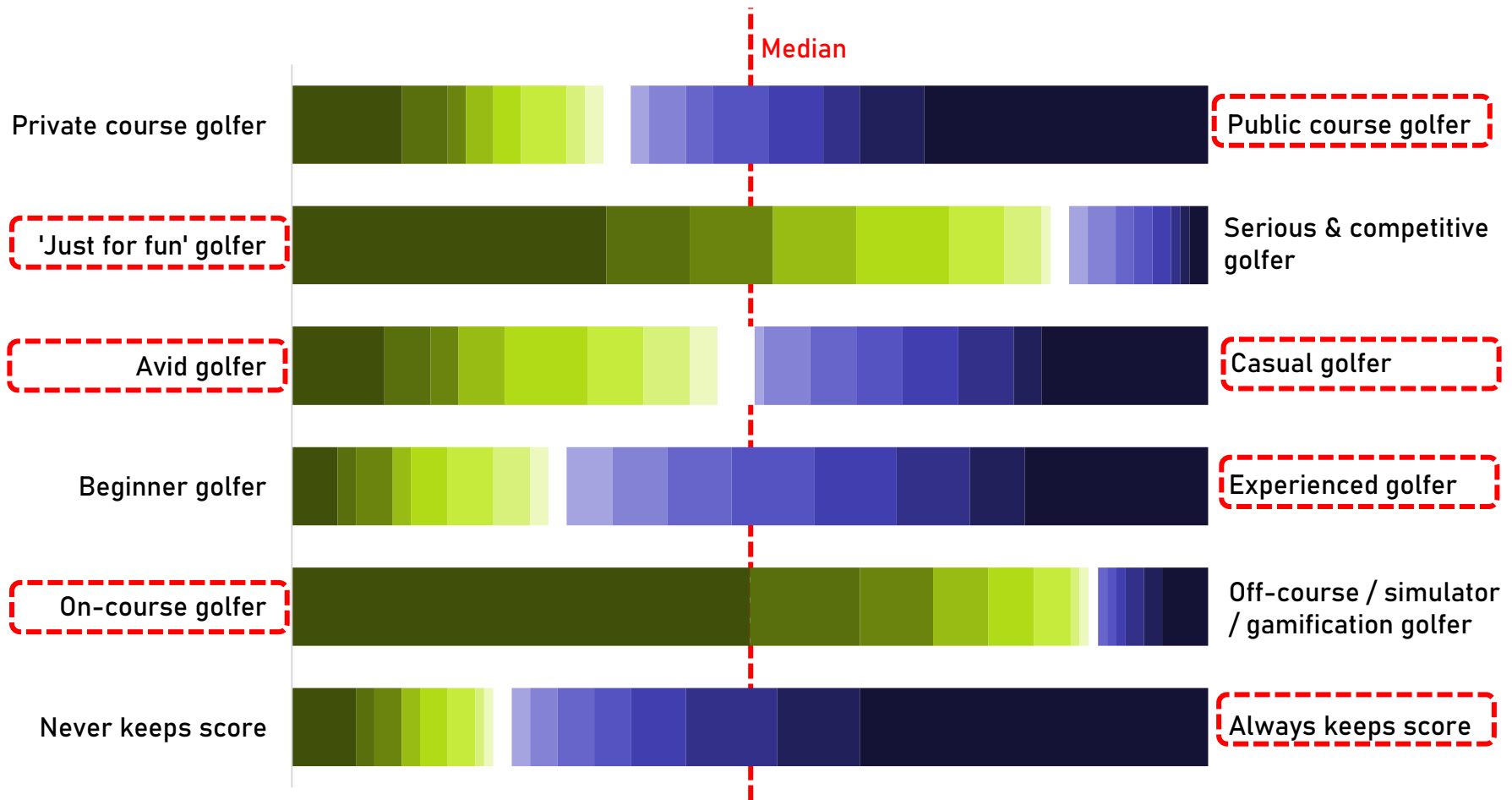
AVIDITY



* Low = Female 20 or better / Male 12 or better, Medium = Female 21-36 / Male 13-28, High = Female 37-54 or no handicap / Male 29-54 or no handicap

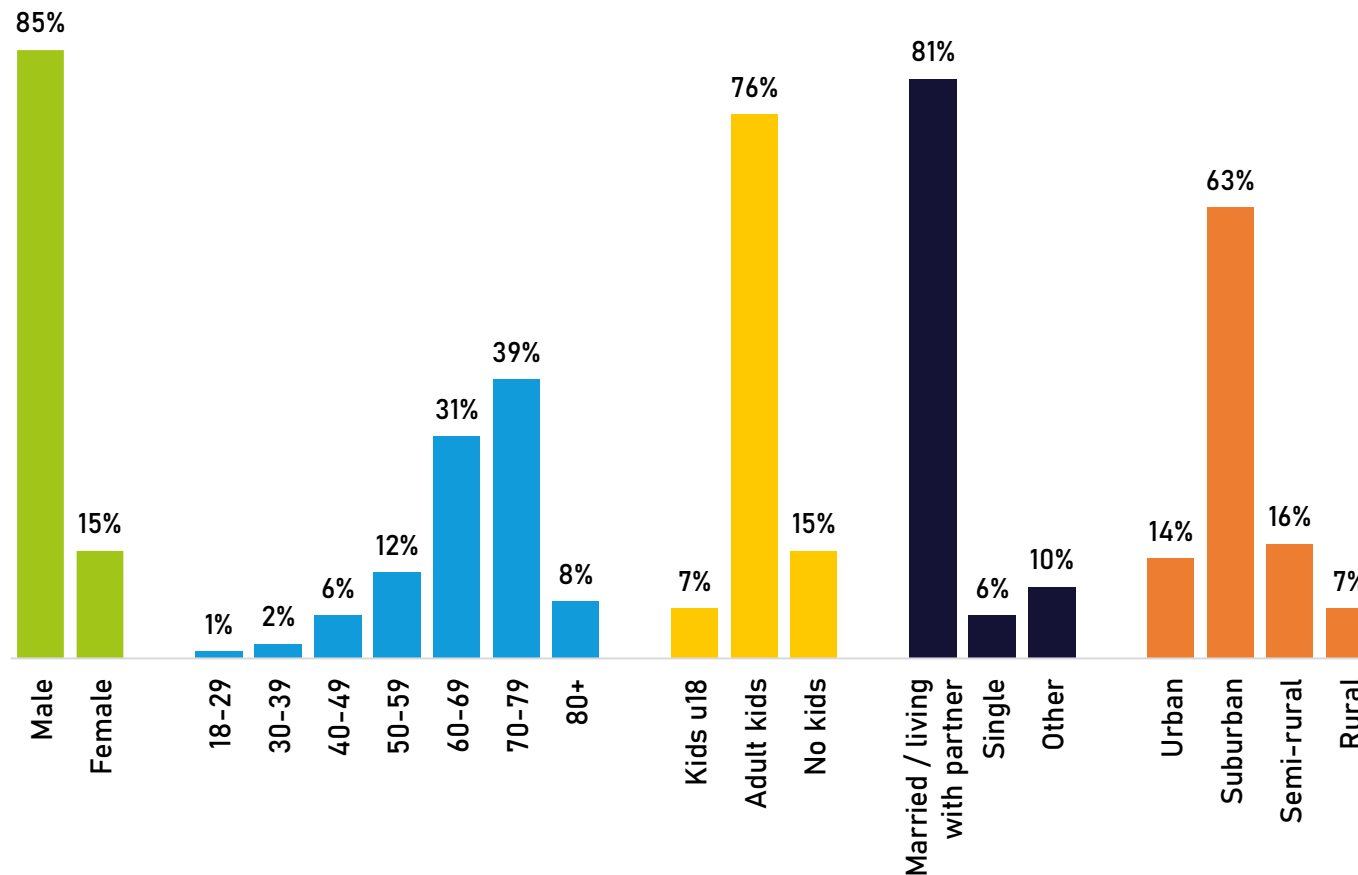
ARCHITYPE ATTRIBUTES | Good Time Golfers

ARCHITYPE ATTITUDES



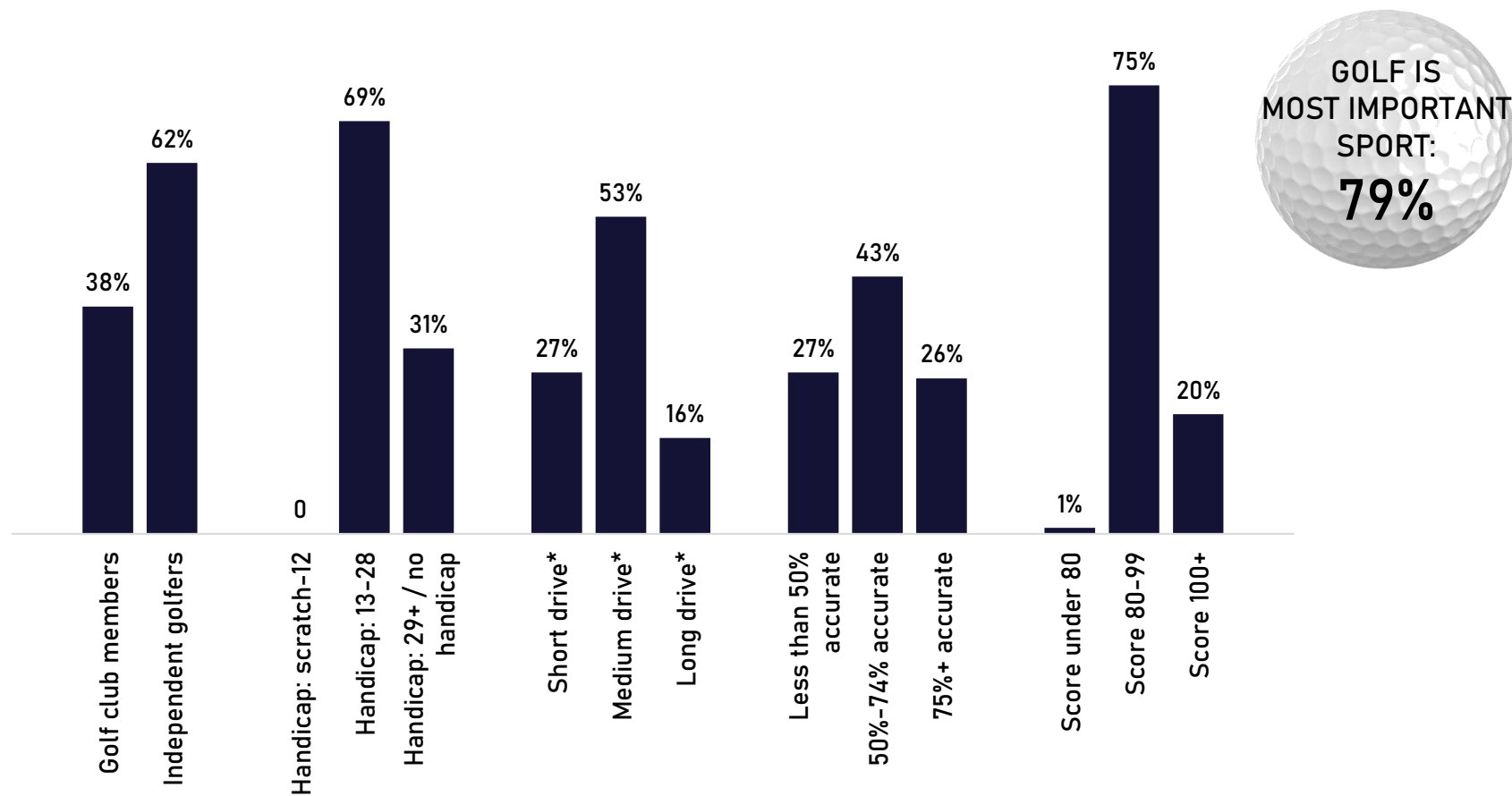
ARCHITYPE ATTRIBUTES | Good Time Golfers

ARCHITYPE FEATURES: DEMOGRAPHICS



ARCHITYPE ATTRIBUTES | Good Time Golfers

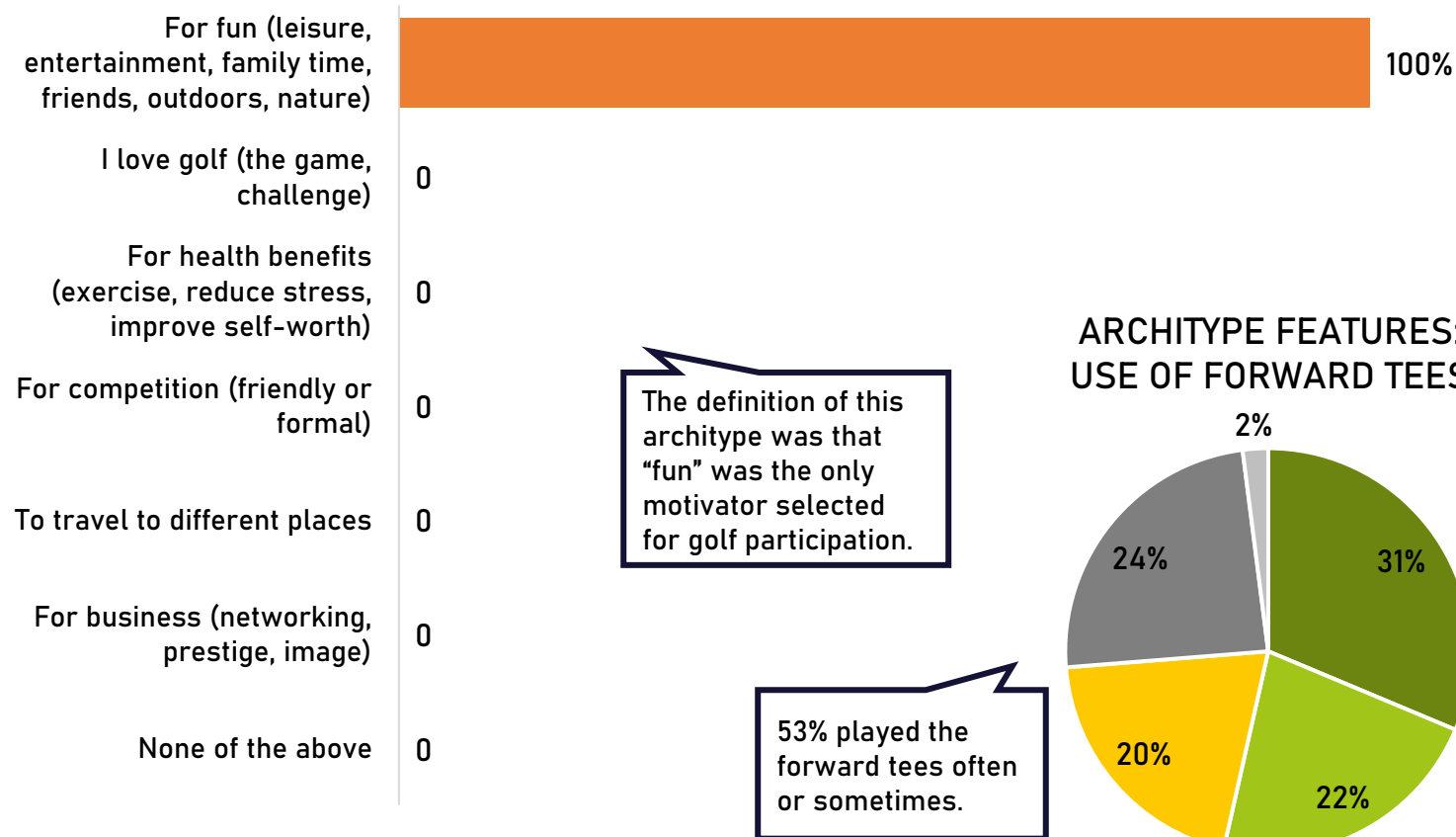
ARCHITYPE FEATURES: GOLF PROFILE



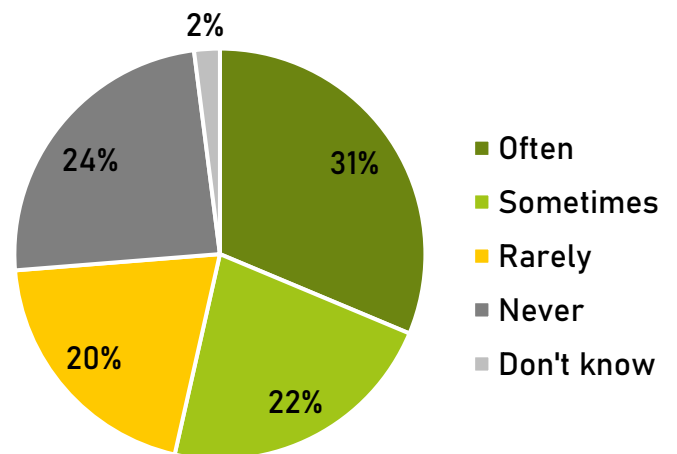
* Short drive = Female <135 yd. / Male <190 yd., Medium drive = Female 135-189 yd. / Male 190-230 yd., Long drive = Female 190+ yd. / Male 231+ yd.

ARCHITYPE ATTRIBUTES | Good Time Golfers

ARCHITYPE FEATURES: GOLF MOTIVATION



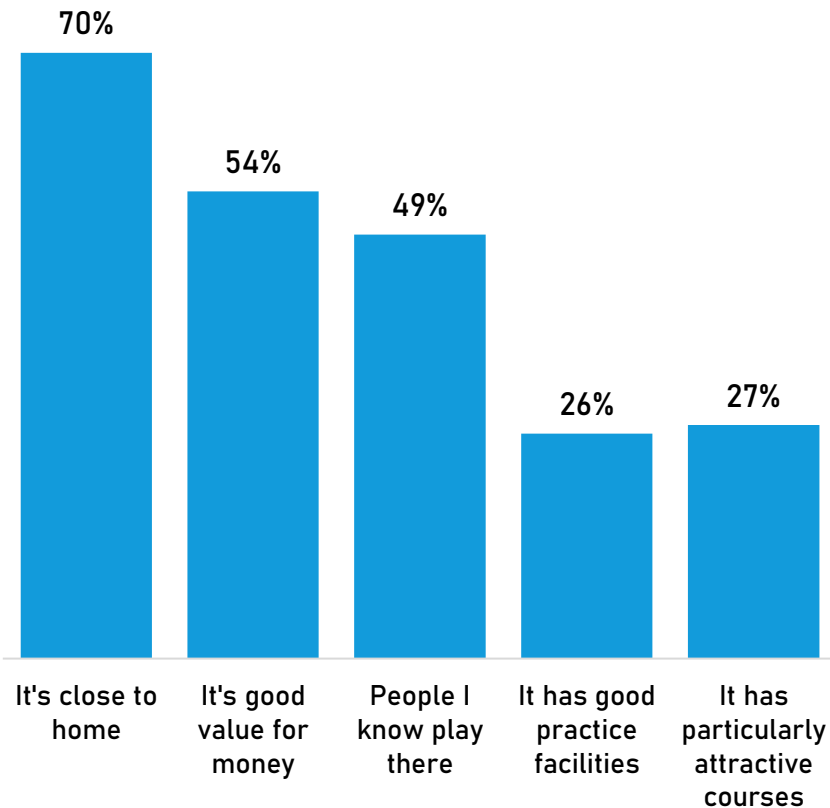
ARCHITYPE FEATURES: USE OF FORWARD TEES



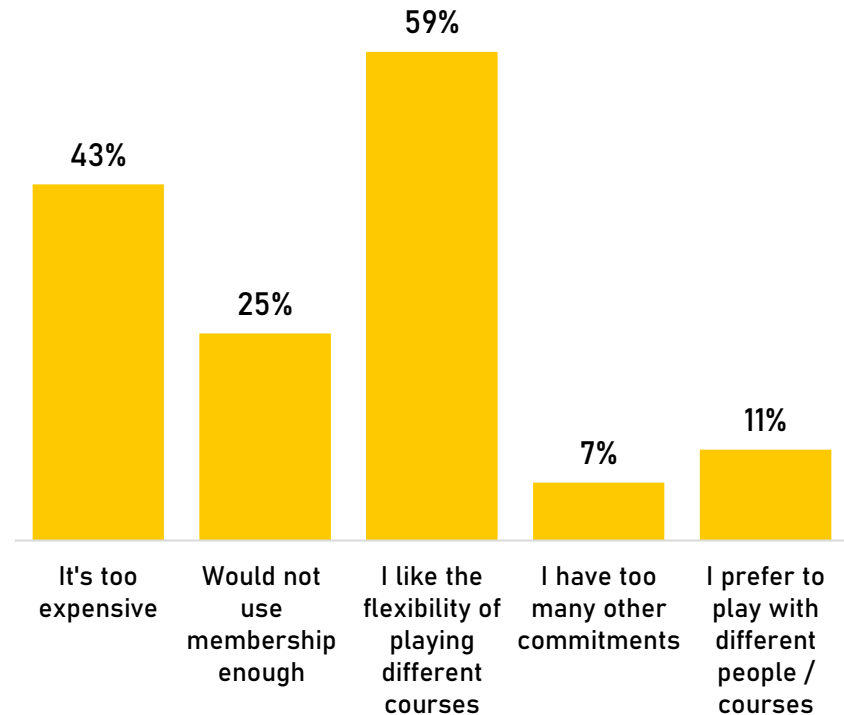
ARCHITYPE ATTRIBUTES | Good Time Golfers

ARCHITYPE FEATURES: REASONS FOR CLUB MEMBERSHIP AND NON-MEMBERSHIP

■ REASONS FOR MEMBERSHIP - TOP 5
Archetype 4 - Good Time Golfers (92)



■ REASONS FOR NON-MEMBERSHIP - TOP 5
Archetype 4 - Good Time Golfers (153)



Base numbers shown in brackets

GOLFER EXPERIENCE ARCHITYPES

ALL THAT / YOUNG STICK

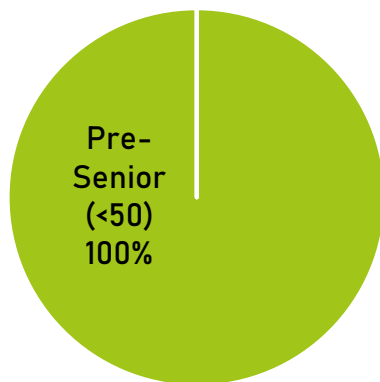
To be categorized as this archetype, golfers needed to:

- Be younger than 50
- Play 9, 18 or par 3 on-course golf
- Have a low handicap index
- Play golf for any reason
- Have played 12 rounds or more in the last year

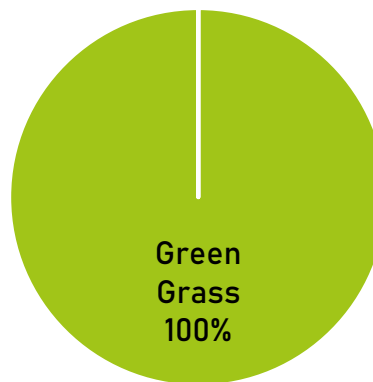
ARCHITYPE ATTRIBUTES | All That / Young Stick

KEY DESCRIPTORS USED TO DEFINE GROUP

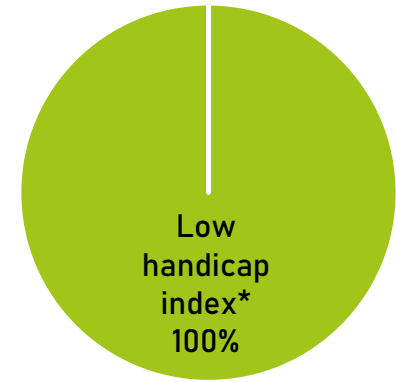
AGE



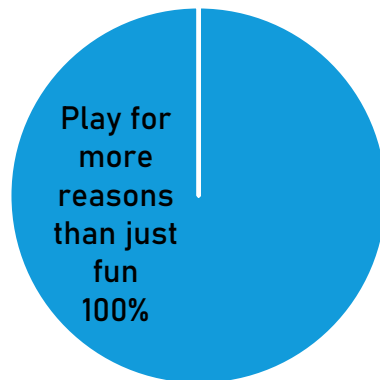
ON/ OFF COURSE



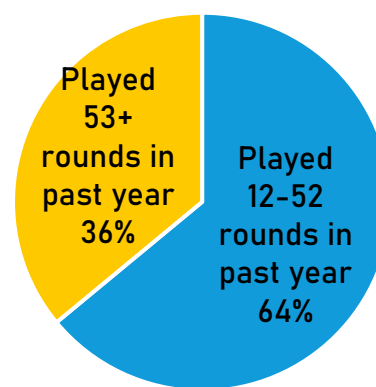
SKILL LEVEL



MOTIVATION



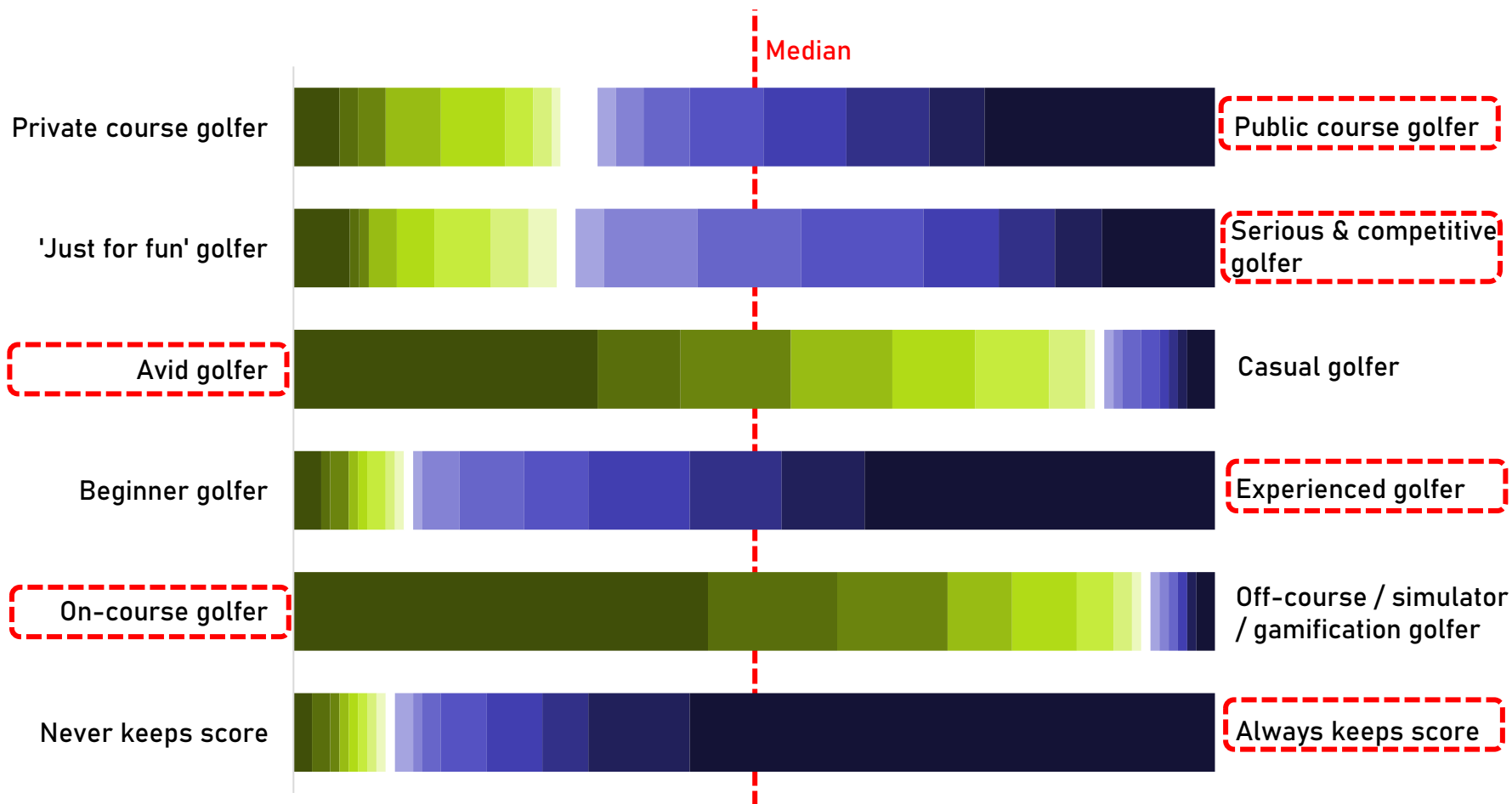
AVIDITY



* Low = Female 20 or better / Male 12 or better, Medium = Female 21-36 / Male 13-28, High Female 37-54 or no handicap / Male 29-54 or no handicap

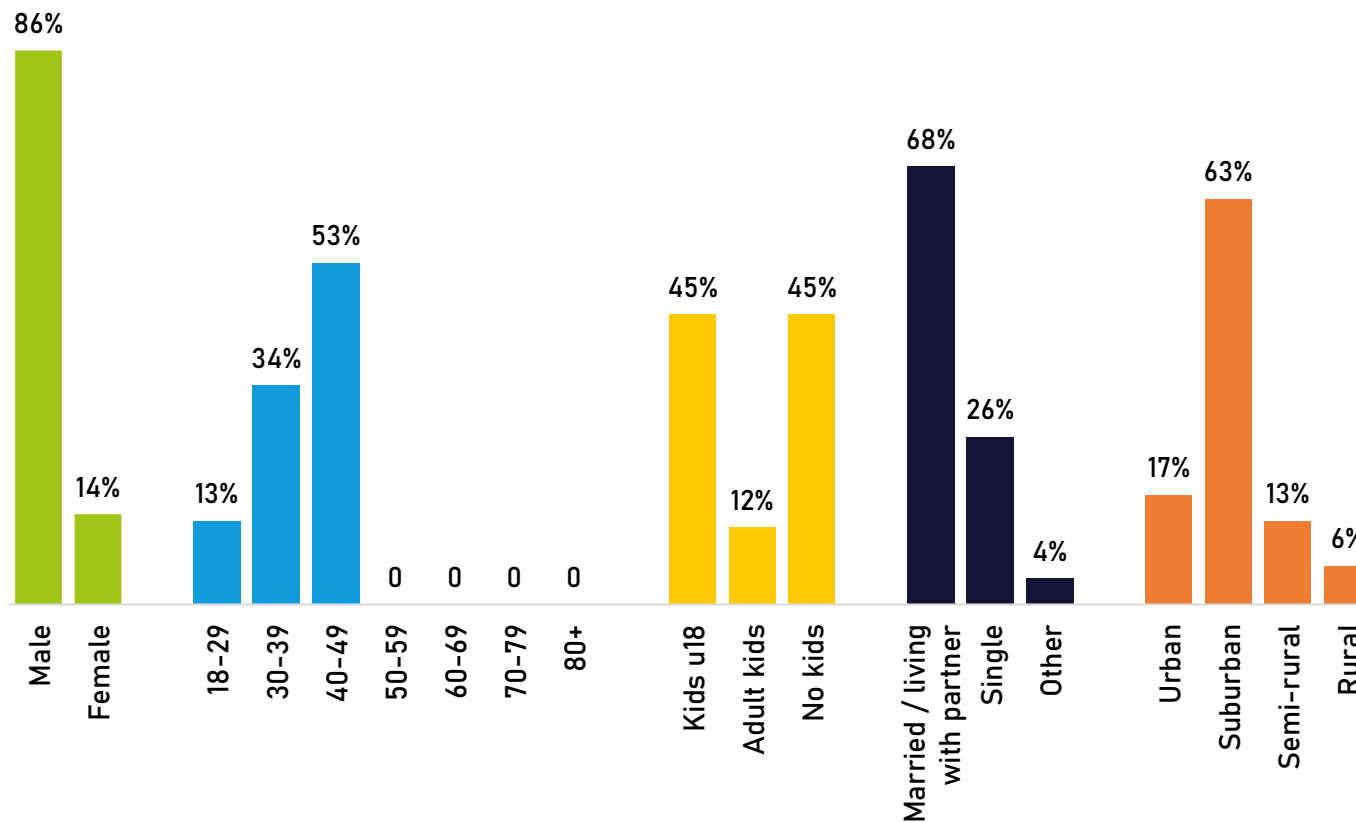
ARCHITYPE ATTRIBUTES | All That / Young Stick

ARCHITYPE ATTITUDES



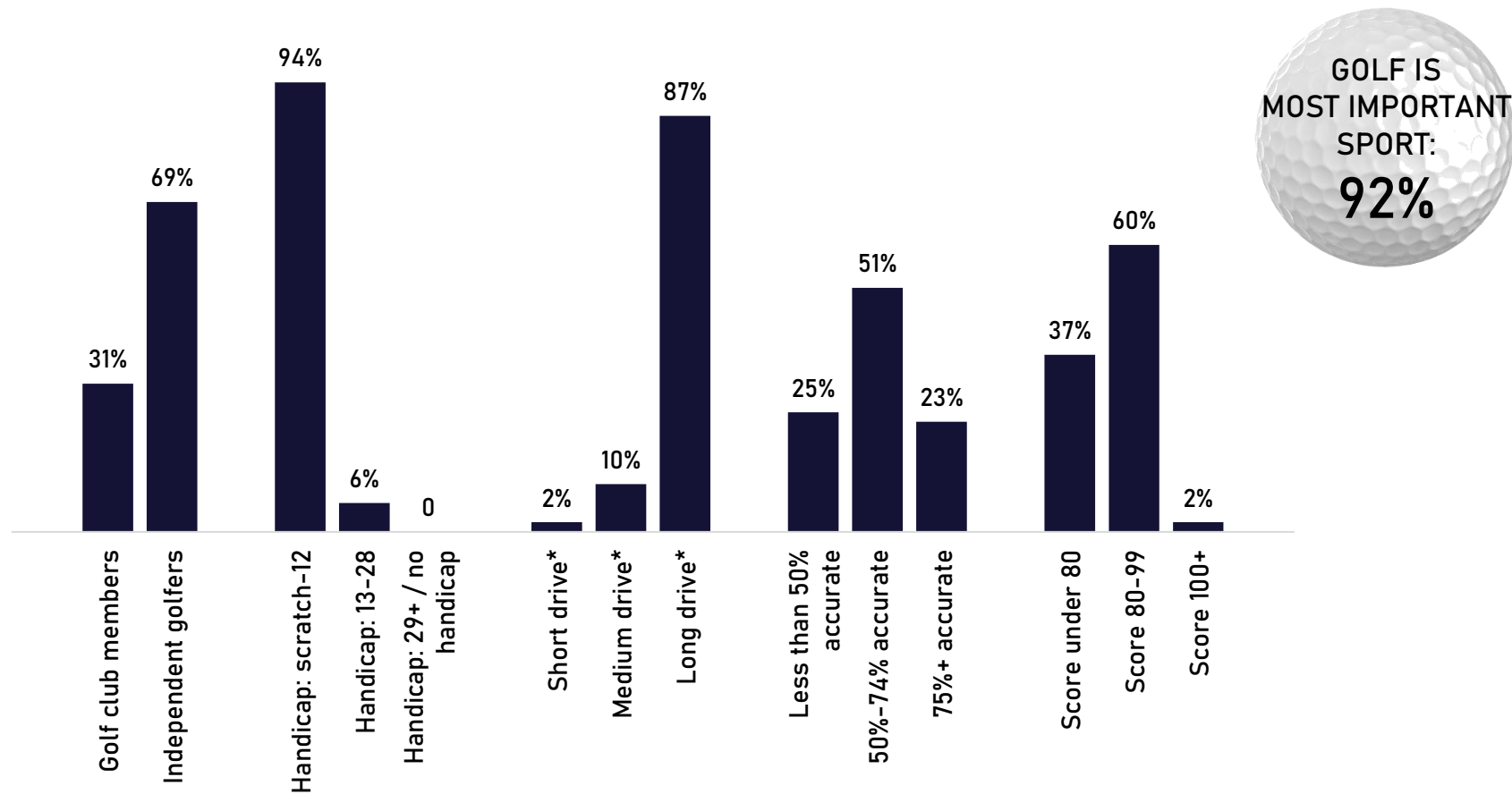
ARCHITYPE ATTRIBUTES | All That / Young Stick

ARCHITYPE FEATURES: DEMOGRAPHICS



ARCHITYPE ATTRIBUTES | All That / Young Stick

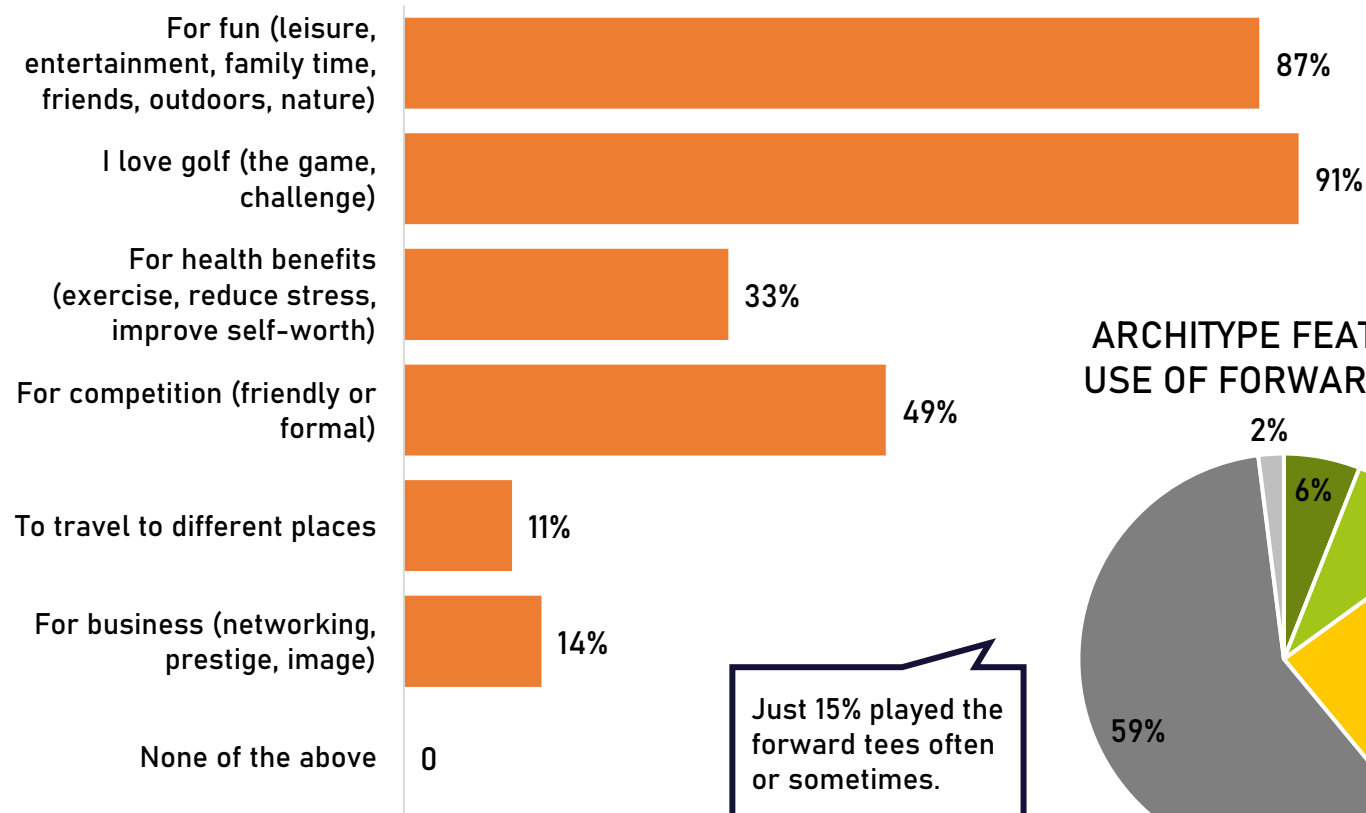
ARCHITYPE FEATURES: GOLF PROFILE



* Short drive = Female <135 yd. / Male <190 yd., Medium drive = Female 135-189 yd. / Male 190-230 yd., Long drive = Female 190+ yd. / Male 231+ yd.

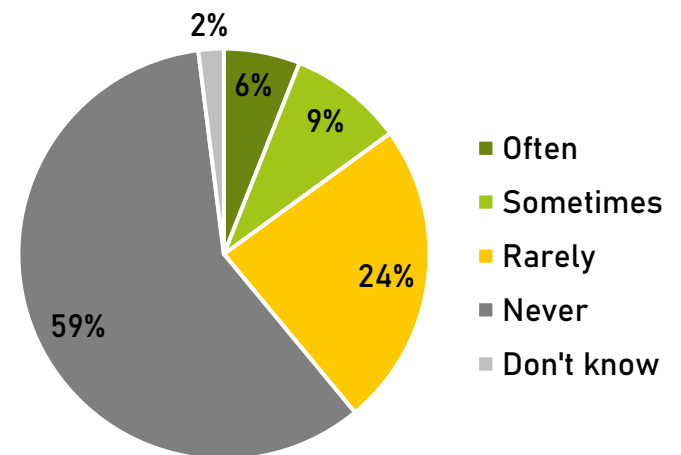
ARCHITYPE ATTRIBUTES | All That / Young Stick

ARCHITYPE FEATURES: GOLF MOTIVATION



91% of this group identified a love of golf / the challenge of the game as a motivation for them to play golf, although "fun" (87%), and the competitive aspect (49%) were also important.

ARCHITYPE FEATURES: USE OF FORWARD TEES

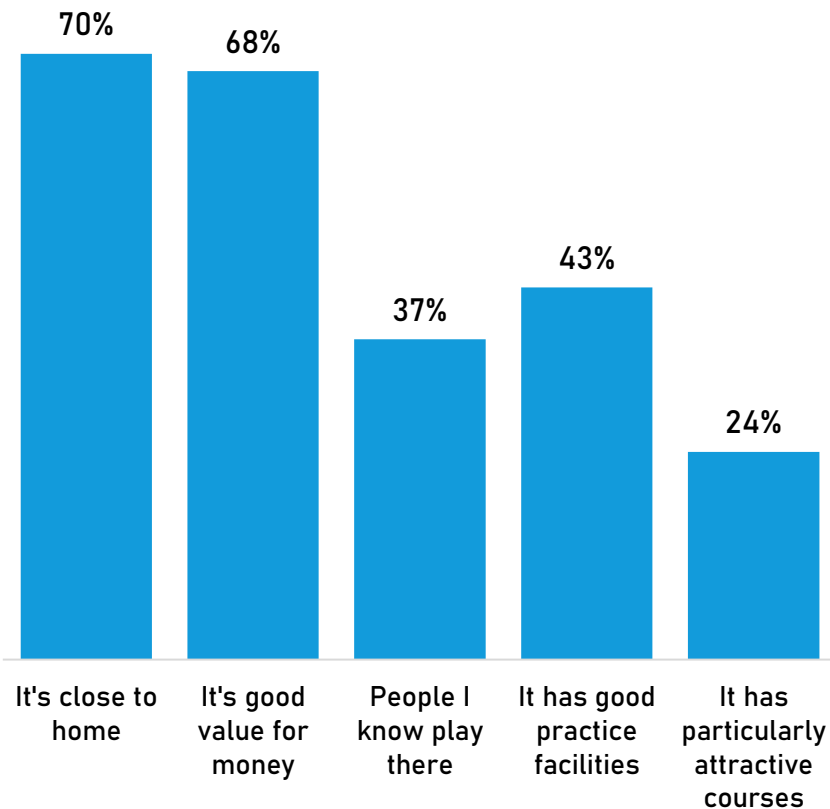


ARCHITYPE ATTRIBUTES | All That / Young Stick

ARCHITYPE FEATURES: REASONS FOR CLUB MEMBERSHIP AND NON-MEMBERSHIP

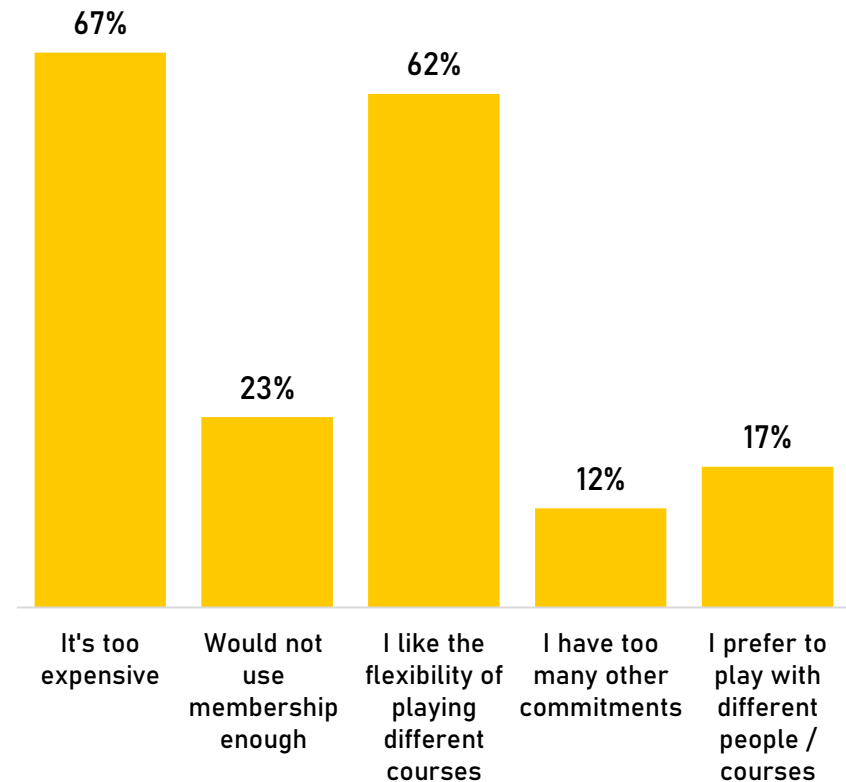
REASONS FOR MEMBERSHIP - TOP 5

Architype 5 - All That / Young Stick (u50) (134)



REASONS FOR NON-MEMBERSHIP - TOP 5

Architype 5 - All That / Young Stick (u50) (270)



Base numbers shown in brackets

GOLFER EXPERIENCE ARCHITYPES

AGING ATHLETE

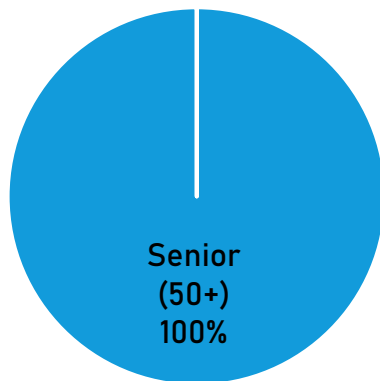
To be categorized as this archetype, golfers needed to:

- Be at least 50 years old
- Play 9, 18 or par 3 on-course golf
- Have a medium handicap index
- Play golf for any reason
- Have played between 12 and 52 rounds in the last year

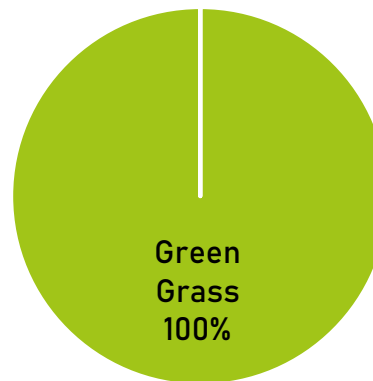
ARCHITYPE ATTRIBUTES | Aging Athlete

KEY DESCRIPTORS USED TO DEFINE GROUP

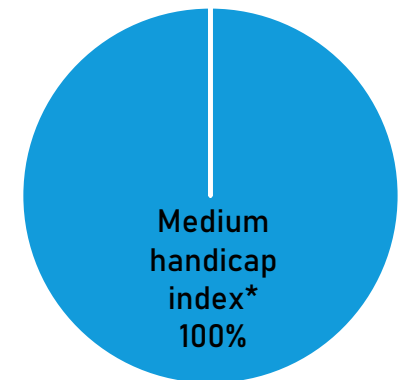
AGE



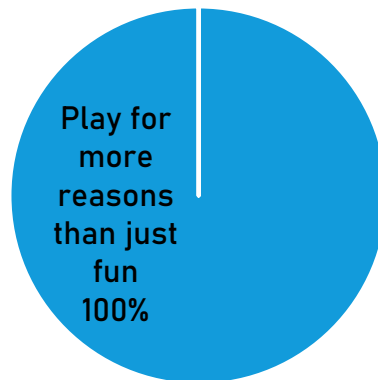
ON/ OFF COURSE



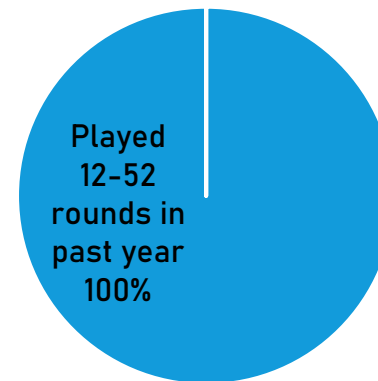
SKILL LEVEL



MOTIVATION



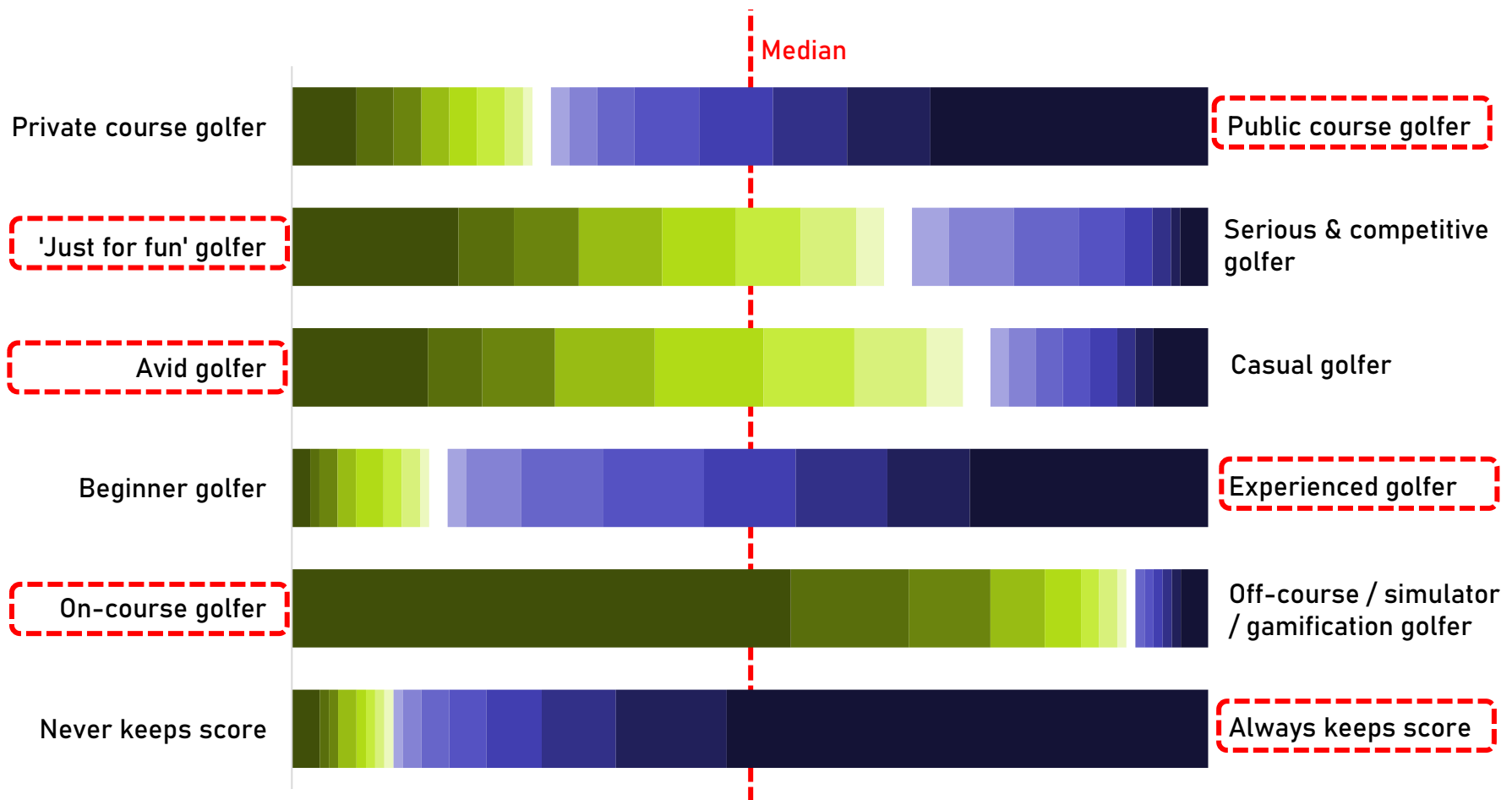
AVIDITY



* Low = Female 20 or better / Male 12 or better, Medium = Female 21-36 / Male 13-28, High = Female 37-54 or no handicap / Male 29-54 or no handicap

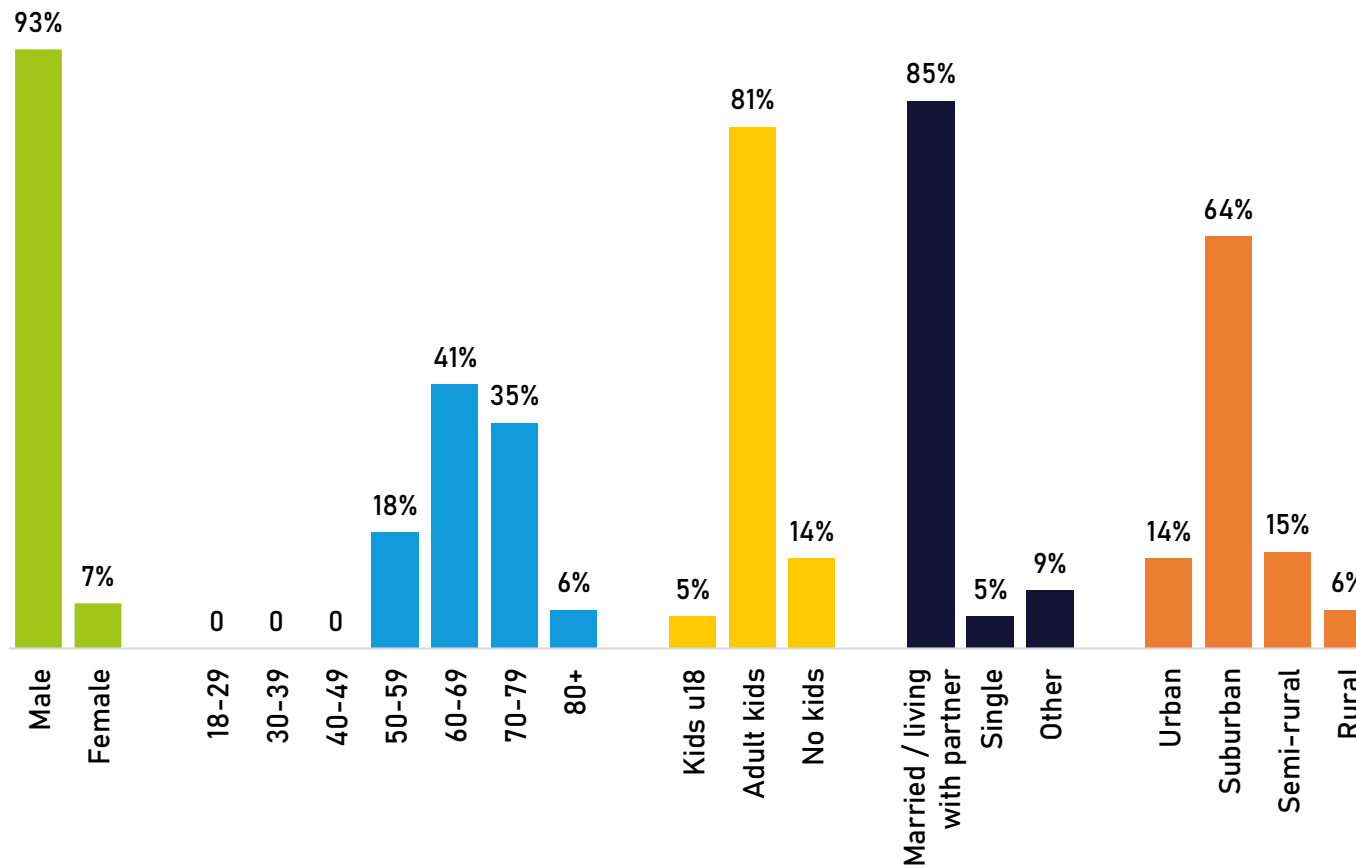
ARCHITYPE ATTRIBUTES | Aging Athlete

ARCHITYPE ATTITUDES



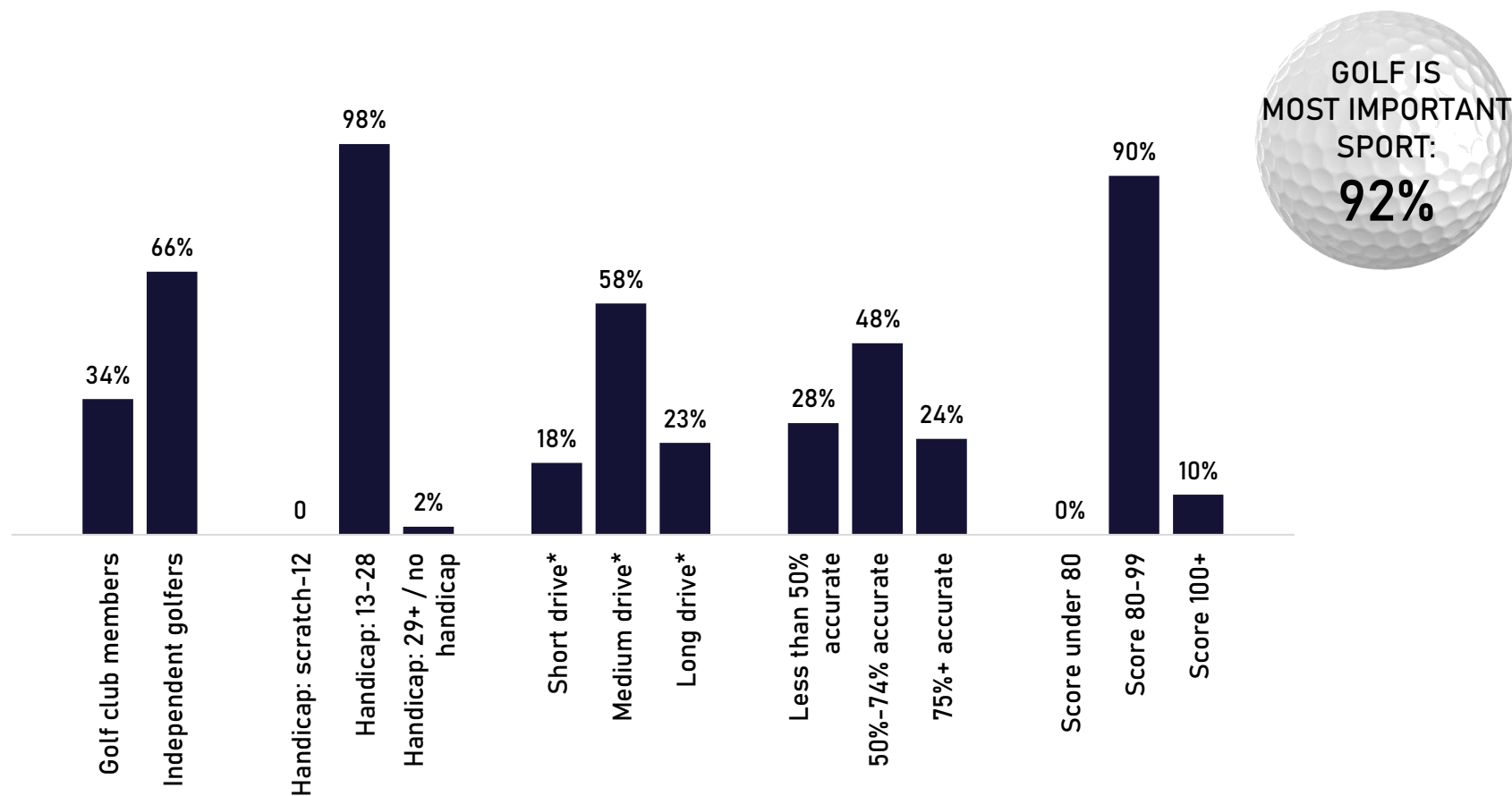
ARCHITYPE ATTRIBUTES | Aging Athlete

ARCHITYPE FEATURES: DEMOGRAPHICS



ARCHITYPE ATTRIBUTES | Aging Athlete

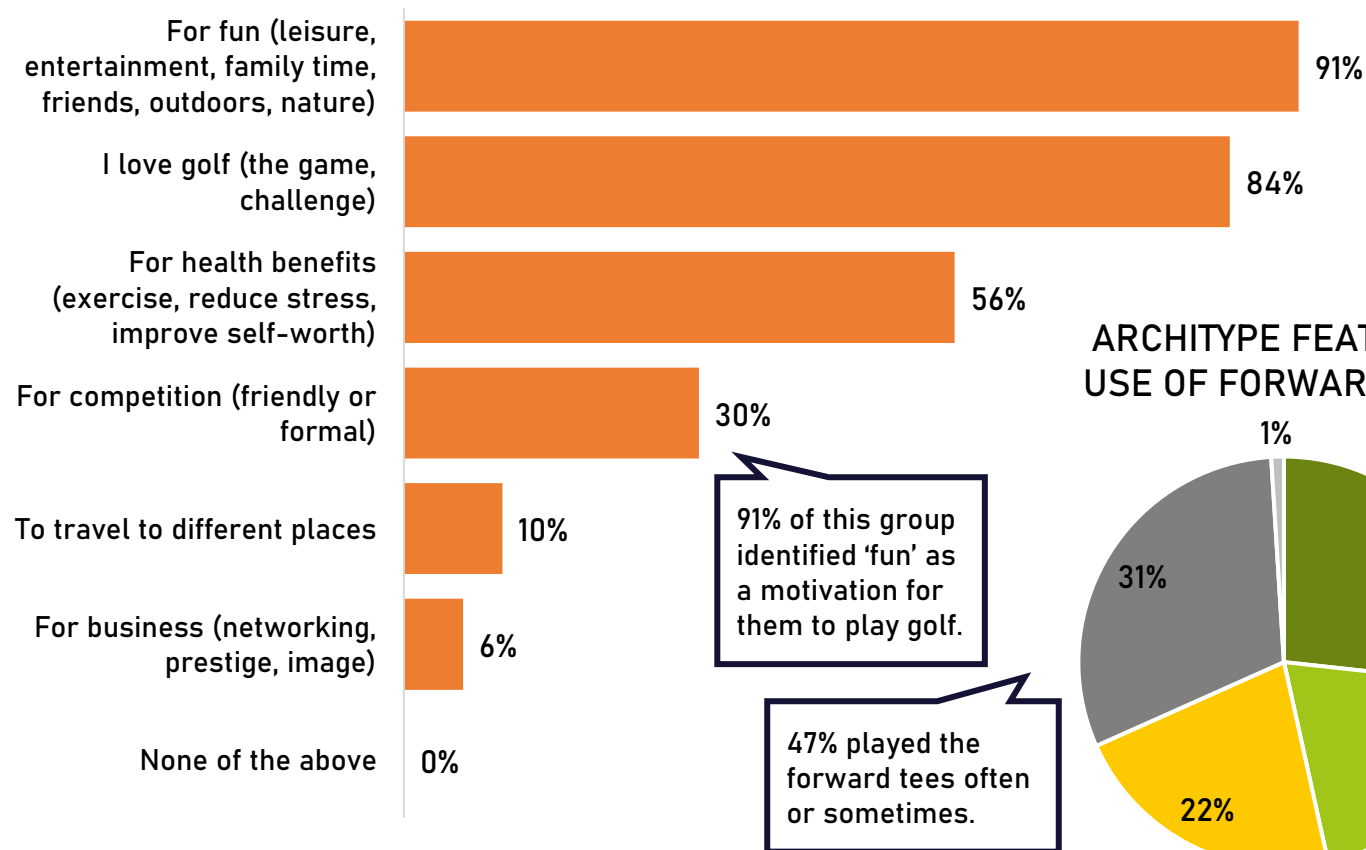
ARCHITYPE FEATURES: GOLF PROFILE



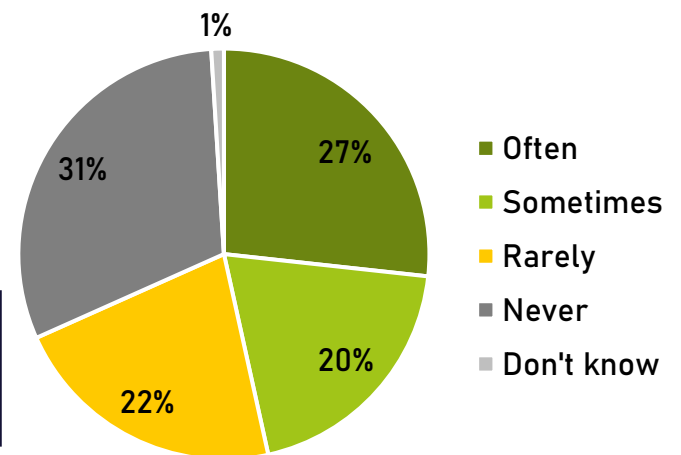
* Short drive = Female <135 yd. / Male <190 yd., Medium drive = Female 135-189 yd. / Male 190-230 yd., Long drive = Female 190+ yd. / Male 231+ yd.

ARCHITYPE ATTRIBUTES | Aging Athlete

ARCHITYPE FEATURES: GOLF MOTIVATION



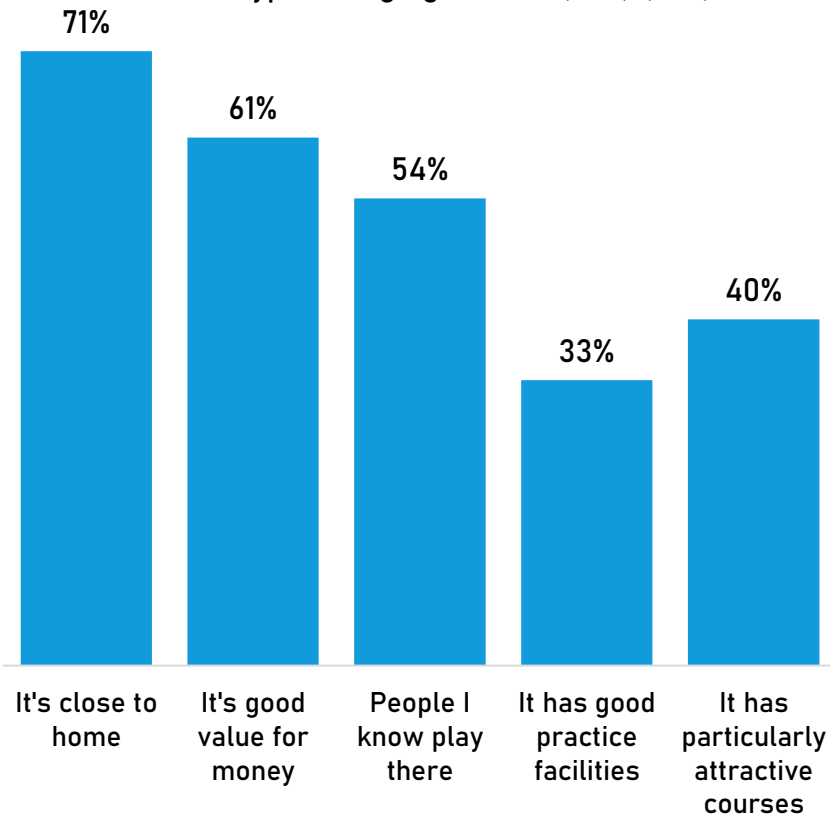
ARCHITYPE FEATURES: USE OF FORWARD TEES



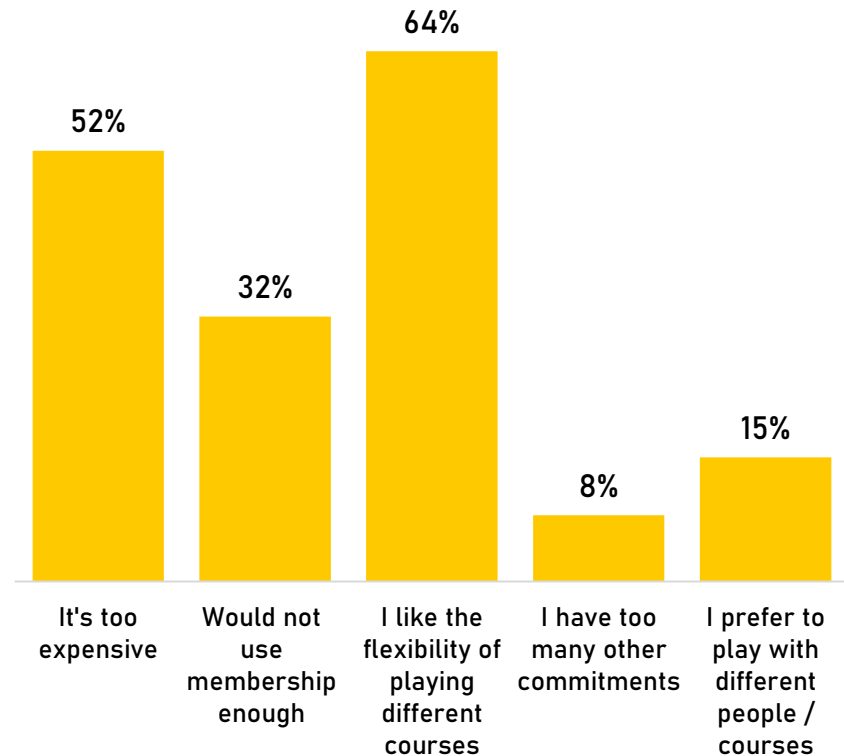
ARCHITYPE ATTRIBUTES | Aging Athlete

ARCHITYPE FEATURES: REASONS FOR CLUB MEMBERSHIP AND NON-MEMBERSHIP

■ REASONS FOR MEMBERSHIP - TOP 5
Architype 6 - Aging Athlete (50+) (774)



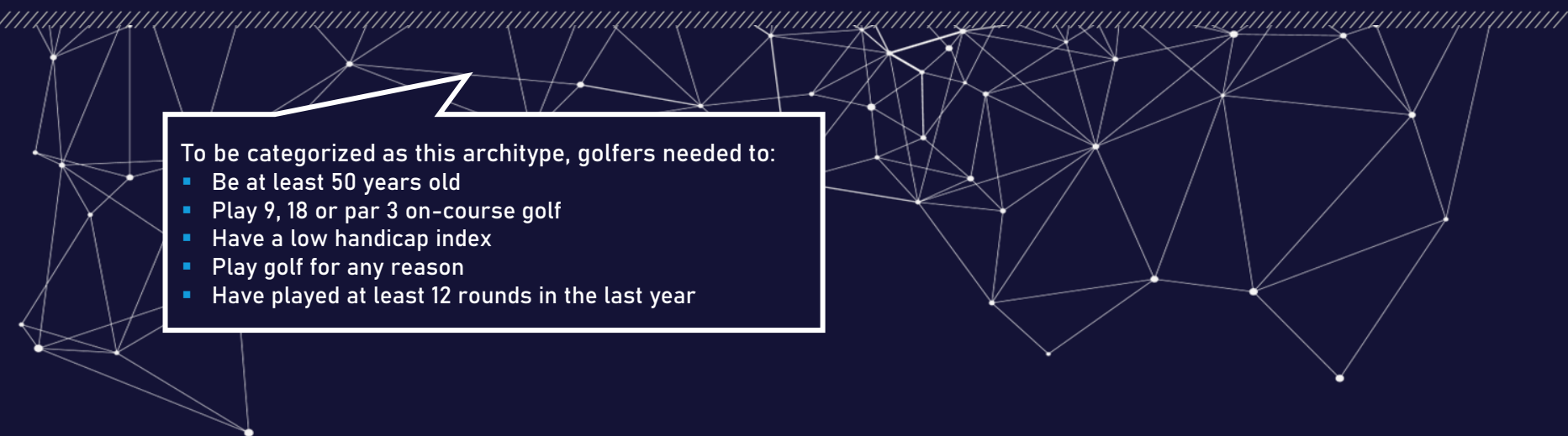
■ REASONS FOR NON-MEMBERSHIP - TOP 5
Architype 6 - Aging Athlete (50+) (1544)



Base numbers shown in brackets

GOLFER EXPERIENCE ARCHITYPES

TRADITIONALIST



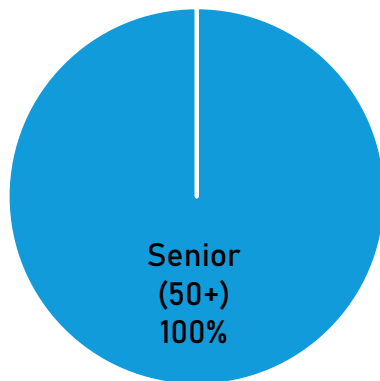
To be categorized as this archetype, golfers needed to:

- Be at least 50 years old
- Play 9, 18 or par 3 on-course golf
- Have a low handicap index
- Play golf for any reason
- Have played at least 12 rounds in the last year

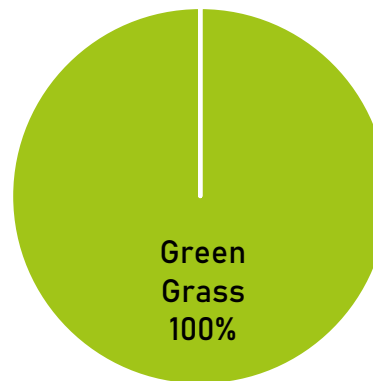
ARCHITYPE ATTRIBUTES | Traditionalist

KEY DESCRIPTORS USED TO DEFINE GROUP

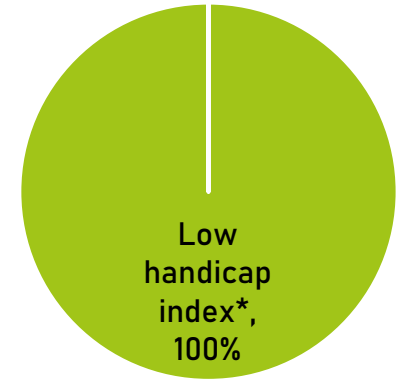
AGE



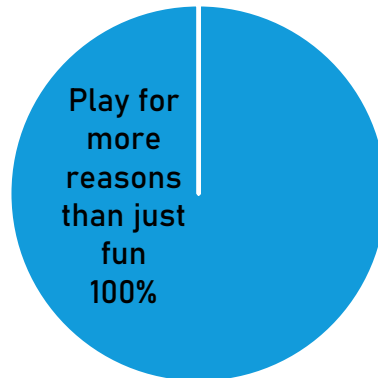
ON/ OFF COURSE



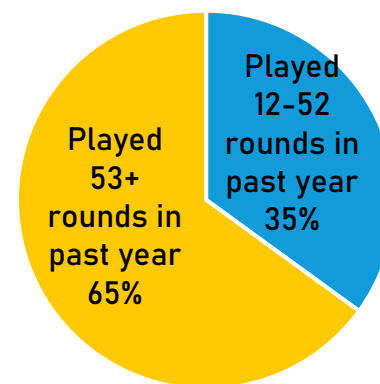
SKILL LEVEL



MOTIVATION



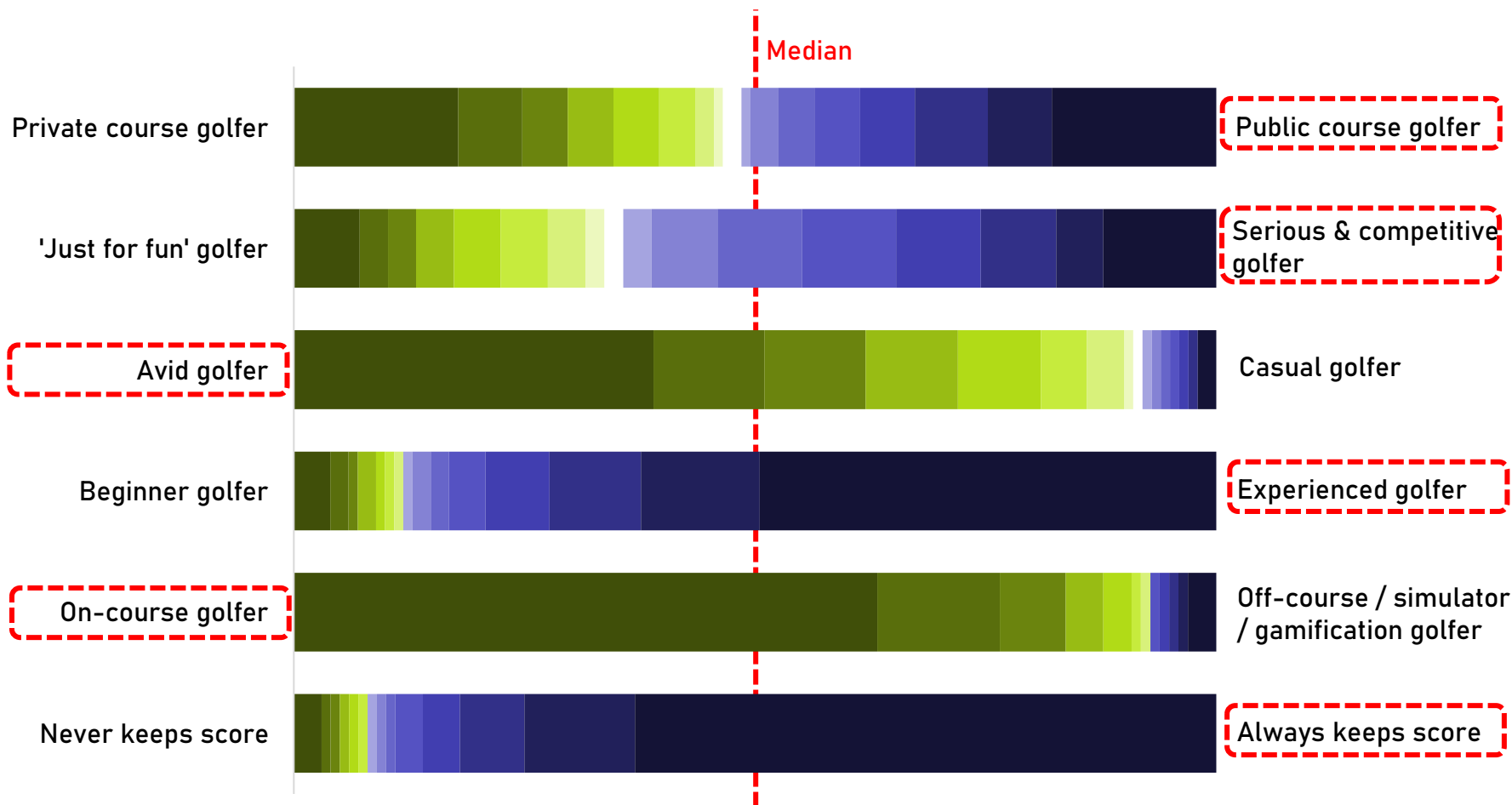
AVIDITY



* Low = Female 20 or better / Male 12 or better, Medium = Female 21-36 / Male 13-28, High Female 37-54 or no handicap / Male 29-54 or no handicap

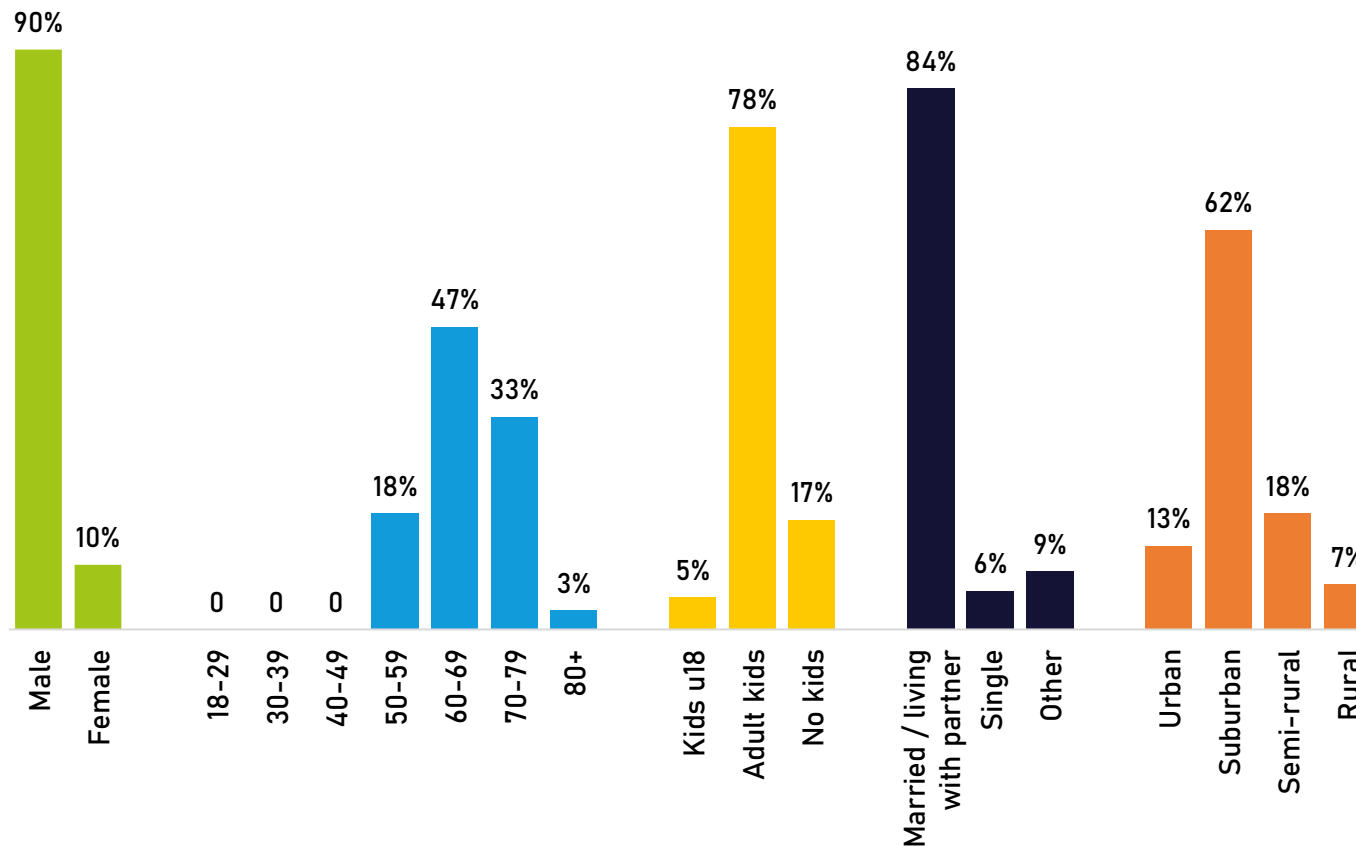
ARCHITYPE ATTRIBUTES | Traditionalist

ARCHITYPE ATTITUDES



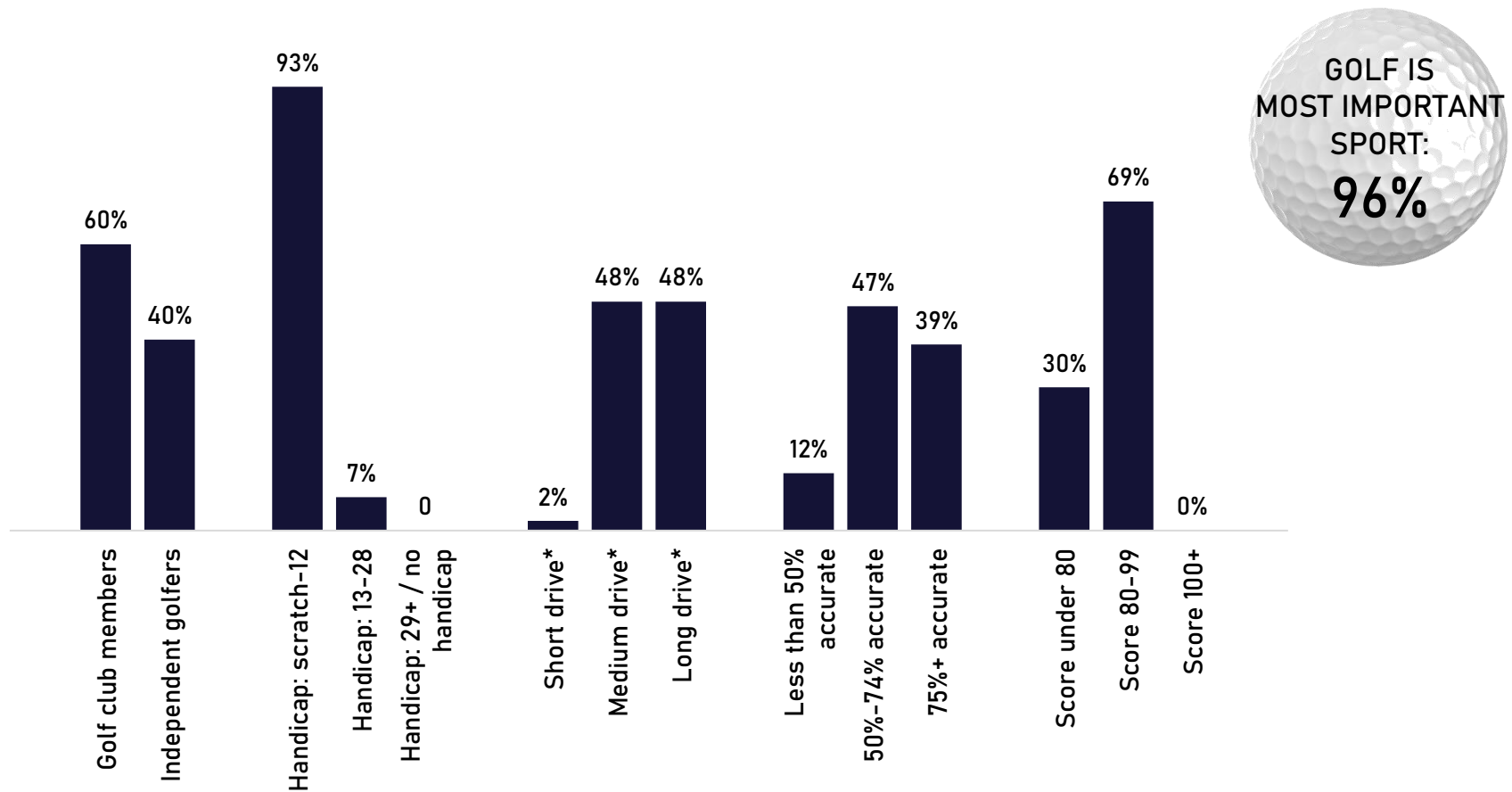
ARCHITYPE ATTRIBUTES | Traditionalist

ARCHITYPE FEATURES: DEMOGRAPHICS



ARCHITYPE ATTRIBUTES | Traditionalist

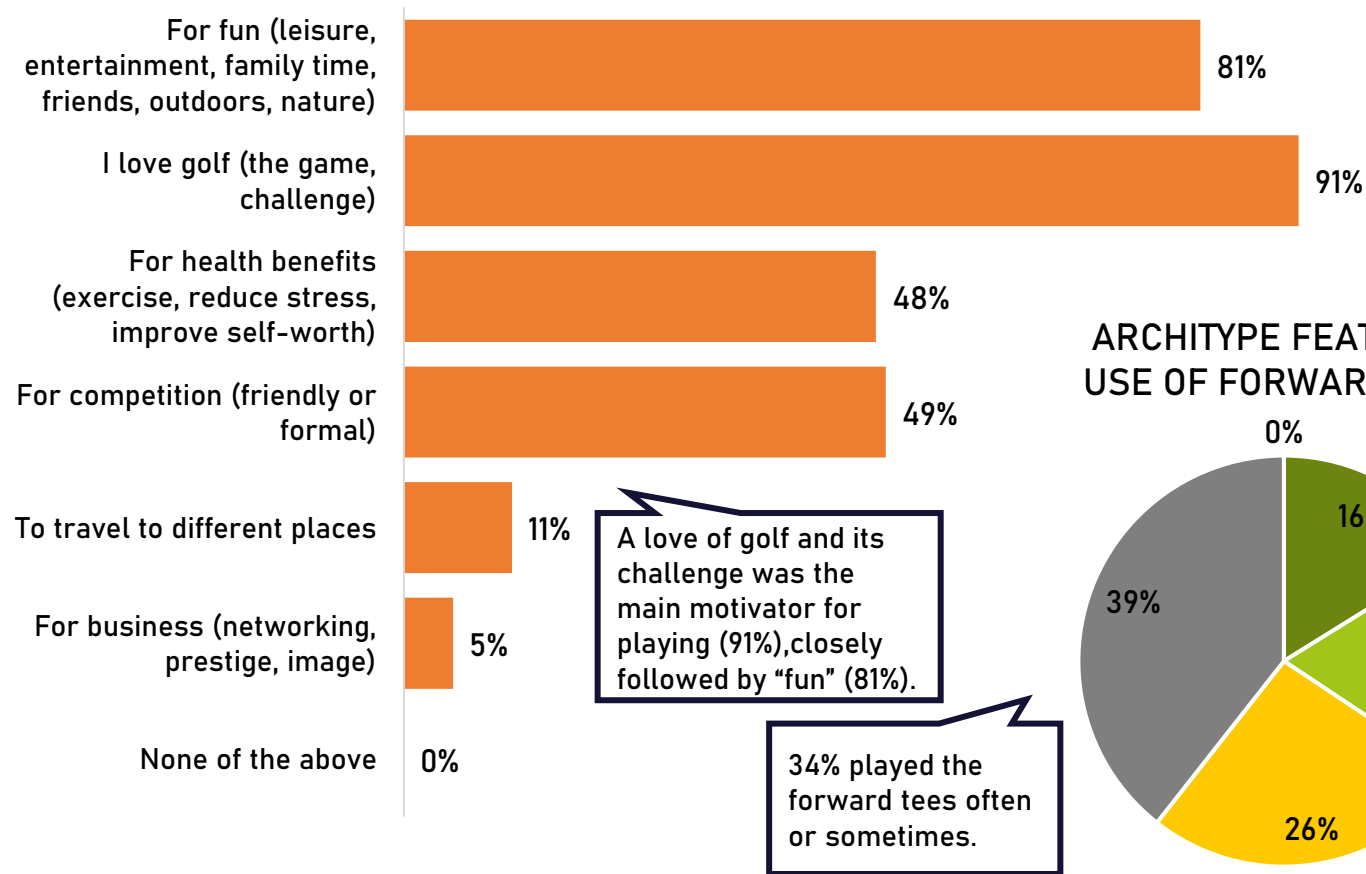
ARCHITYPE FEATURES: GOLF PROFILE



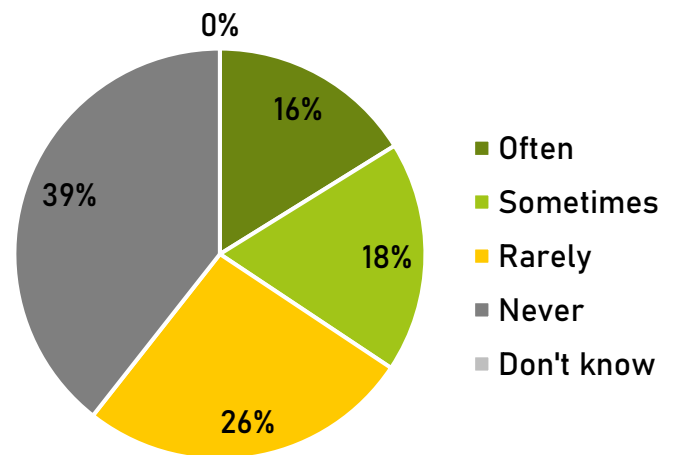
* Short drive = Female <135 yd. / Male <190 yd., Medium drive = Female 135-189 yd. / Male 190-230 yd., Long drive = Female 190+ yd. / Male 231+ yd.

ARCHITYPE ATTRIBUTES | Traditionalist

ARCHITYPE FEATURES: GOLF MOTIVATION

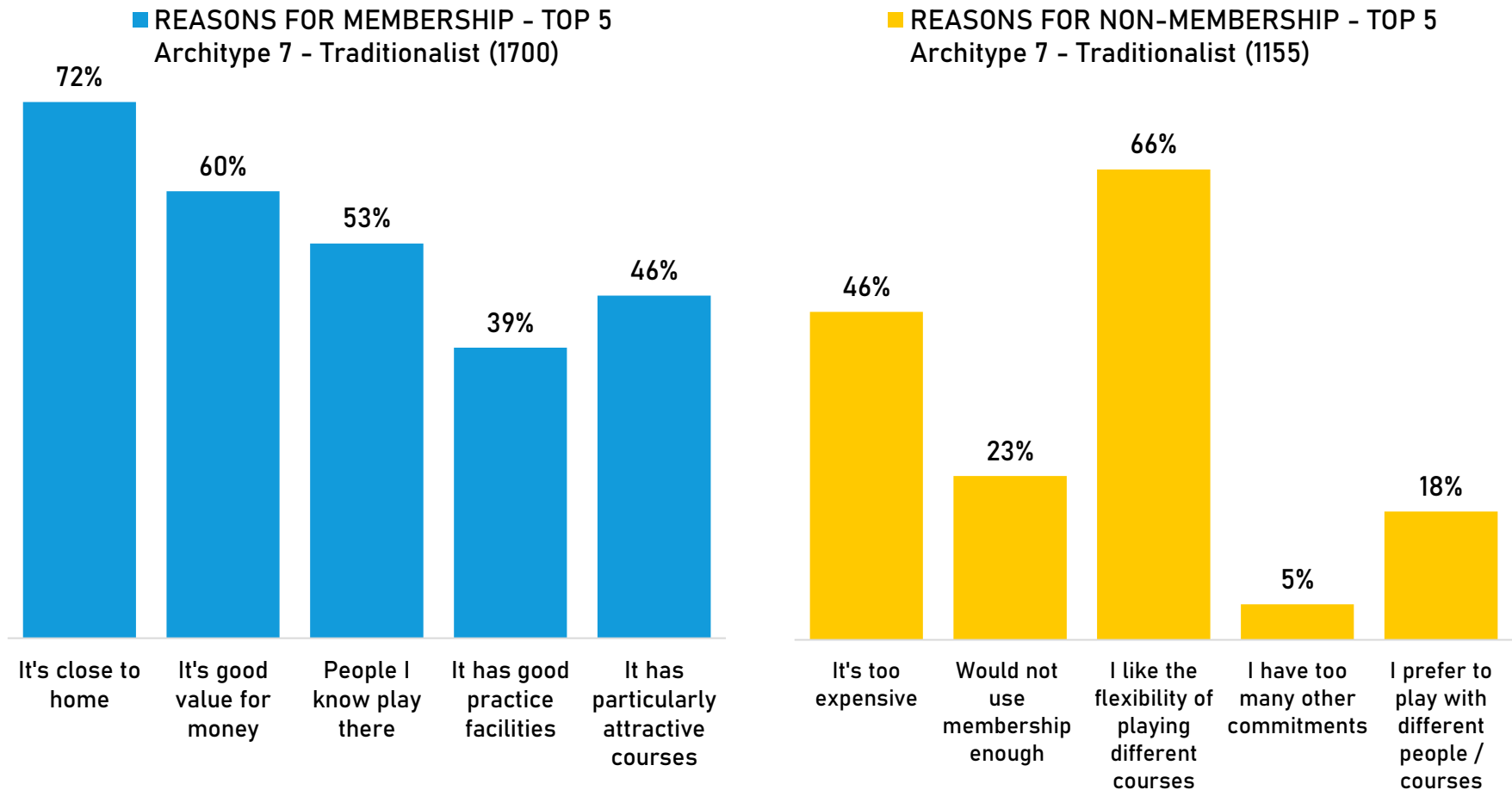


ARCHITYPE FEATURES: USE OF FORWARD TEES



ARCHITYPE ATTRIBUTES | Traditionalist

ARCHITYPE FEATURES: REASONS FOR CLUB MEMBERSHIP AND NON-MEMBERSHIP



Base numbers shown in brackets

GOLFER EXPERIENCE ARCHITYPES

YOUNG ATHLETE

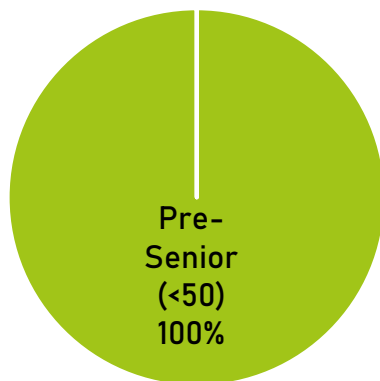
To be categorized as this archetype, golfers needed to:

- Be younger than 50
- Play 9, 18 or par 3 on-course golf
- Have a medium handicap index
- Play golf for any reason
- Have played between 12 and 52 rounds in the last year

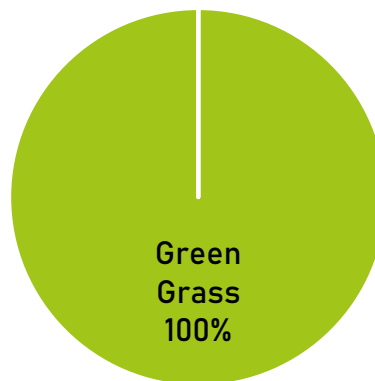
ARCHITYPE ATTRIBUTES | Young Athlete

KEY DESCRIPTORS USED TO DEFINE GROUP

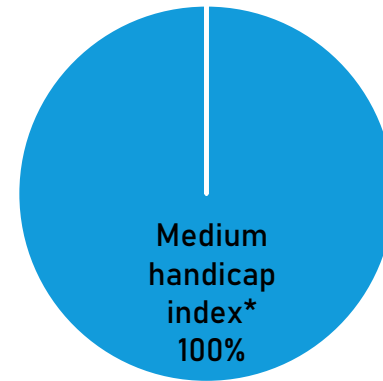
AGE



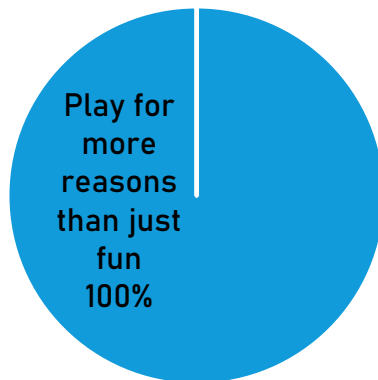
ON/ OFF COURSE



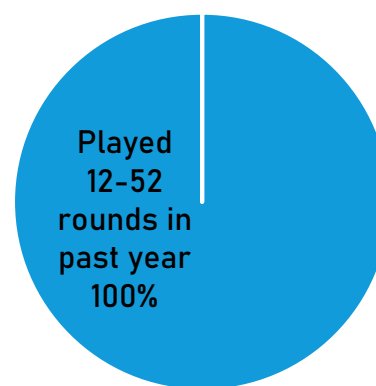
SKILL LEVEL



MOTIVATION



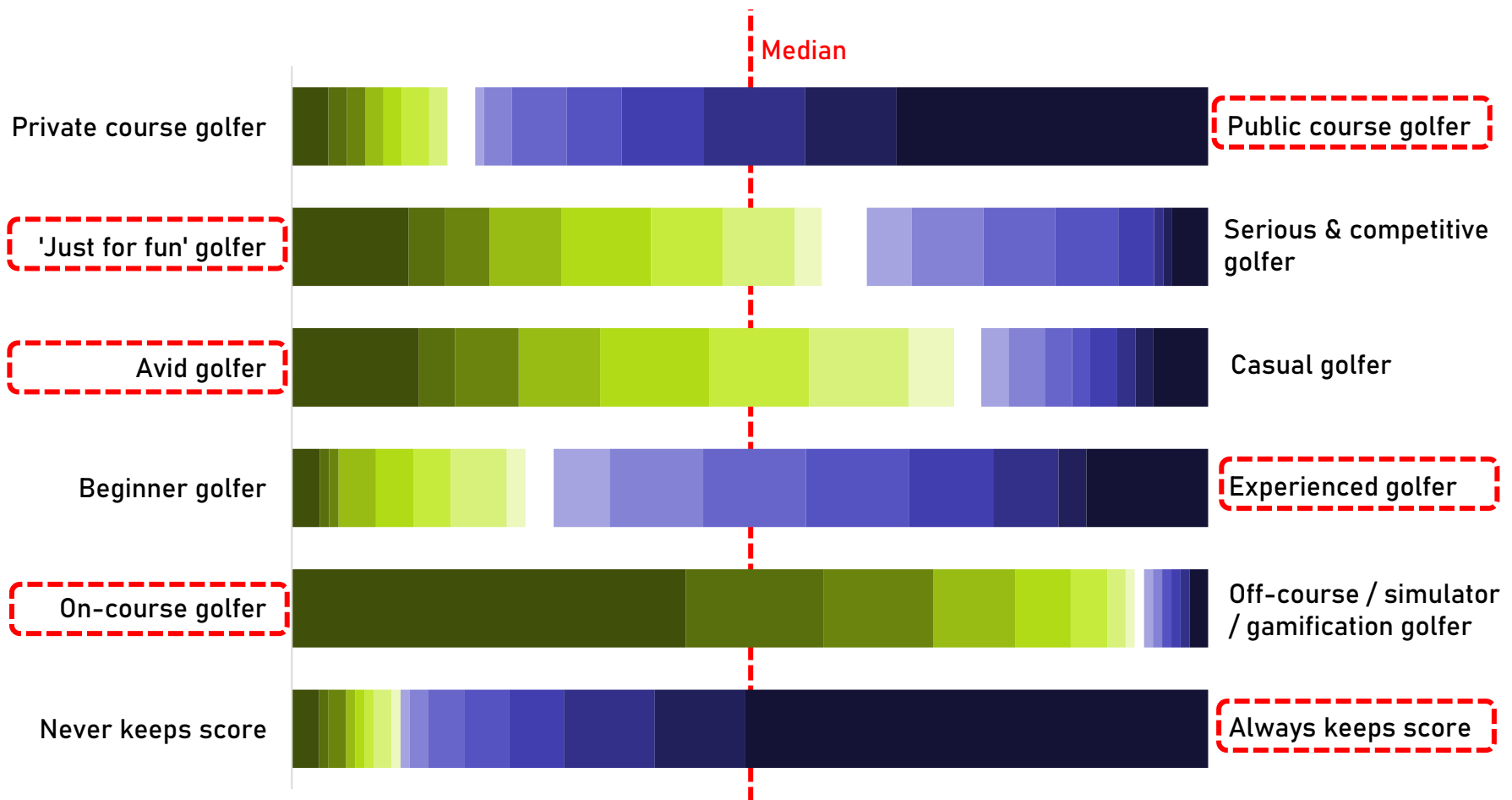
AVIDITY



* Low = Female 20 or better / Male 12 or better, Medium = Female 21-36 / Male 13-28, High Female 37-54 or no handicap / Male 29-54 or no handicap

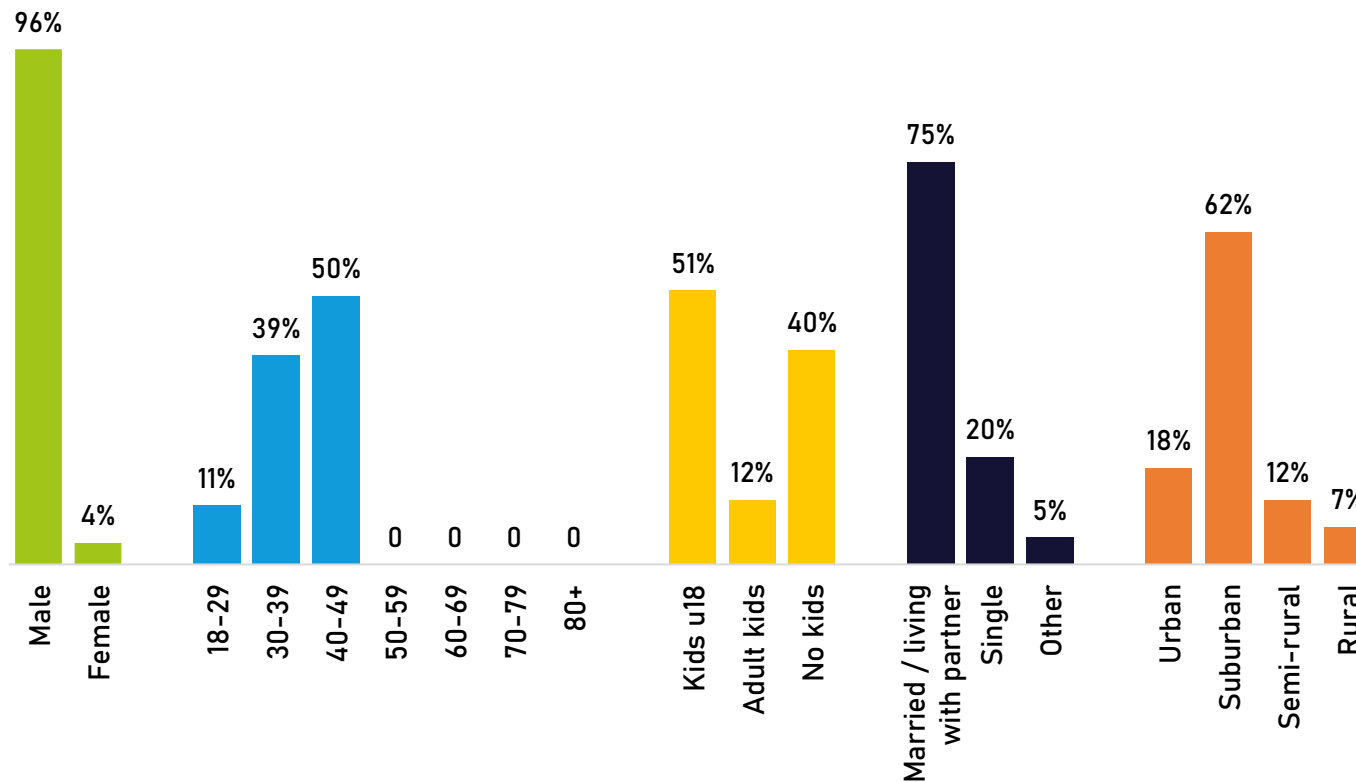
ARCHITYPE ATTRIBUTES | Young Athlete

ARCHITYPE ATTITUDES



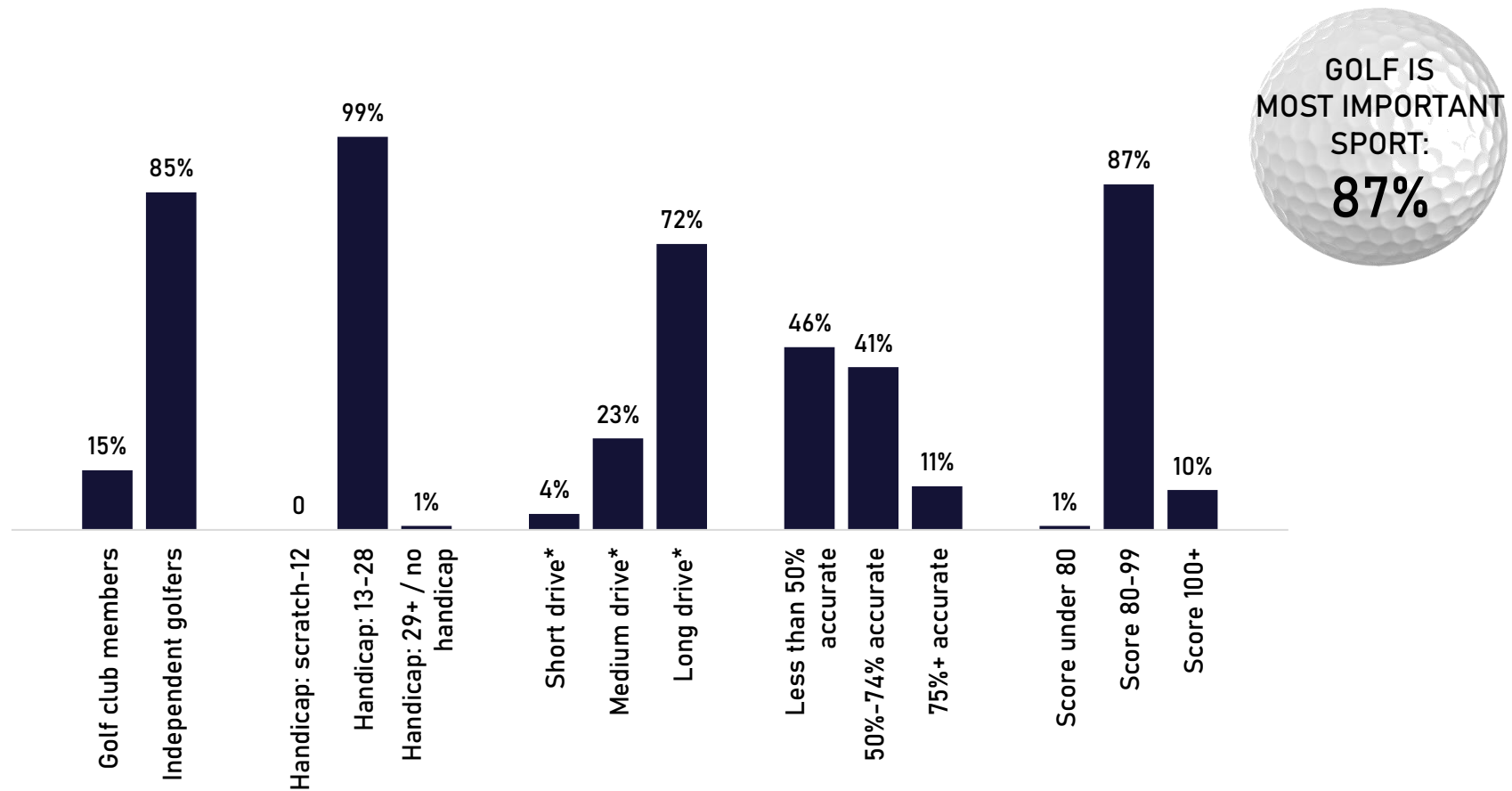
ARCHITYPE ATTRIBUTES | Young Athlete

ARCHITYPE FEATURES: DEMOGRAPHICS



ARCHITYPE ATTRIBUTES | Young Athlete

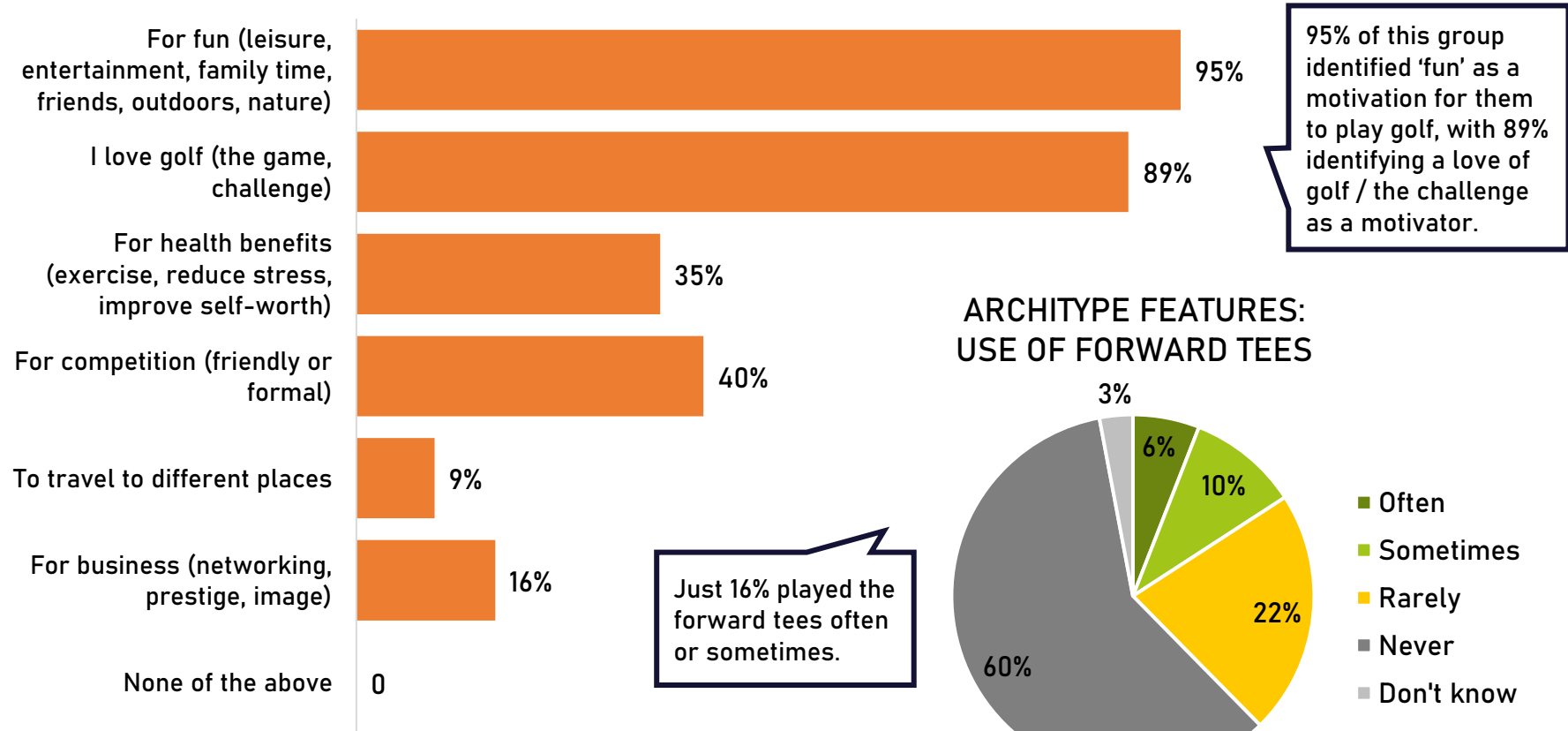
ARCHITYPE FEATURES: GOLF PROFILE



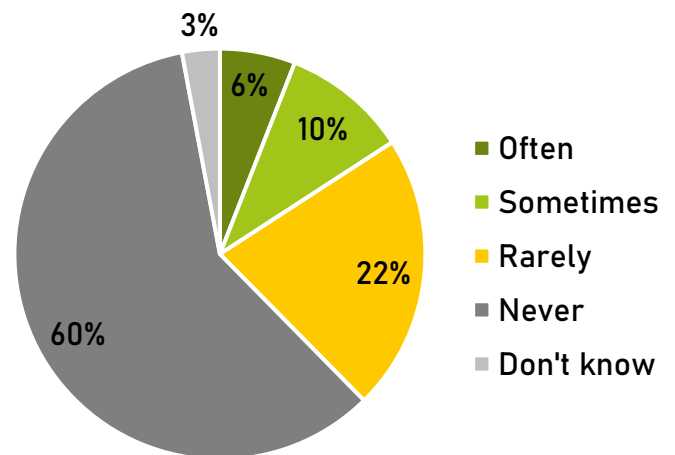
* Short drive = Female <135 yd. / Male <190 yd., Medium drive = Female 135-189 yd. / Male 190-230 yd., Long drive = Female 190+ yd. / Male 231+ yd.

ARCHITYPE ATTRIBUTES | Young Athlete

ARCHITYPE FEATURES: GOLF MOTIVATION

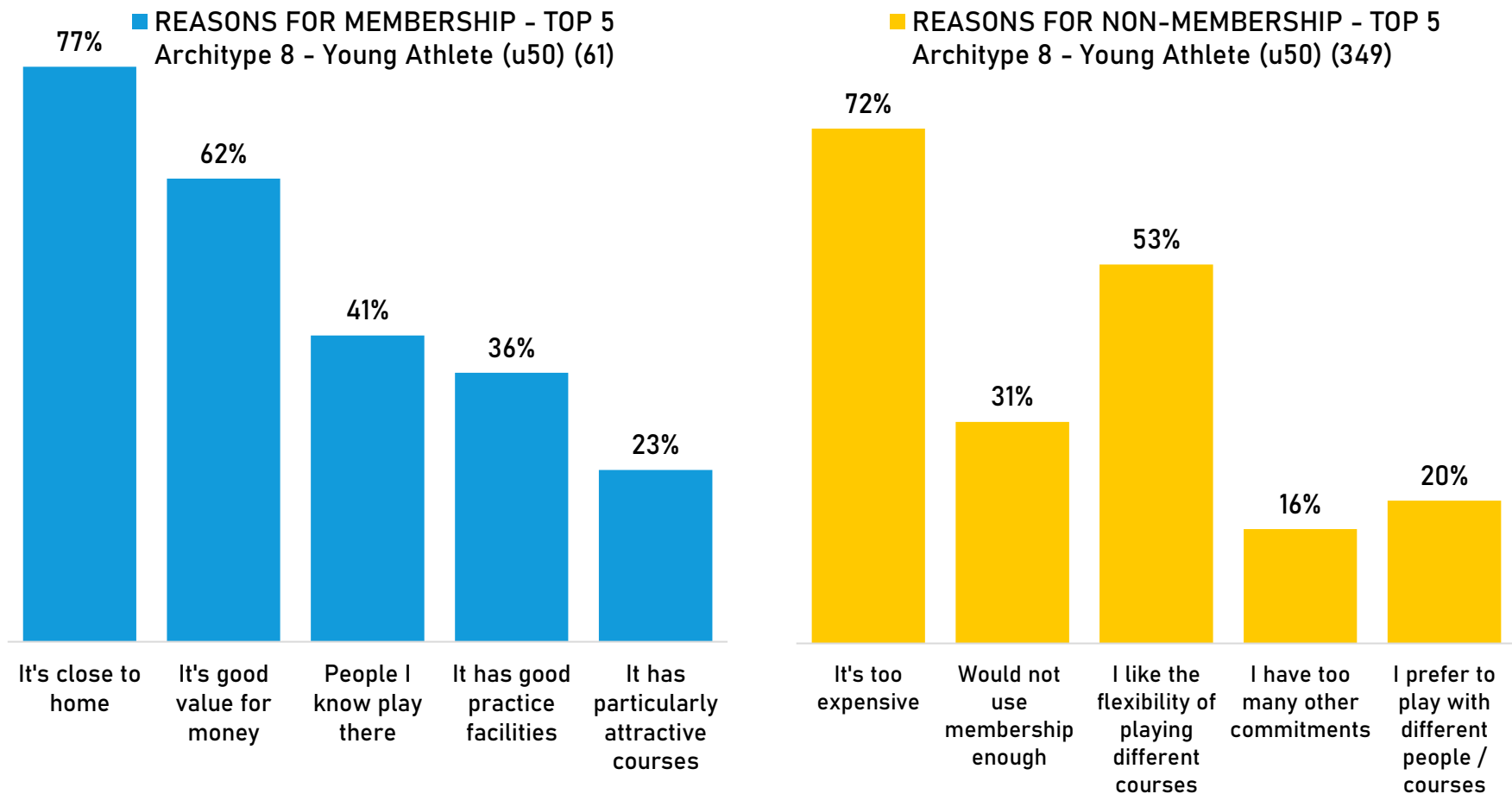


ARCHITYPE FEATURES: USE OF FORWARD TEES



ARCHITYPE ATTRIBUTES | Young Athlete

ARCHITYPE FEATURES: REASONS FOR CLUB MEMBERSHIP AND NON-MEMBERSHIP



Base numbers shown in brackets

GOLFER EXPERIENCE ARCHITYPES

GOLFERTAINMENT

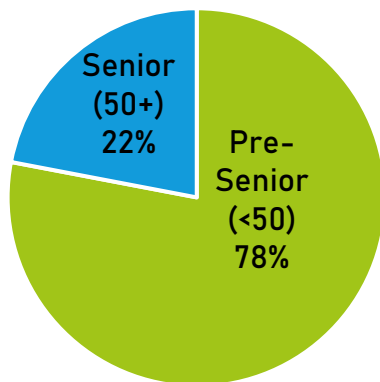
To be categorized as this archetype, golfers needed to:

- Be any age
- Play off-course golf only
- Have no handicap index
- Play golf for any reason
- Have played zero rounds in the last year

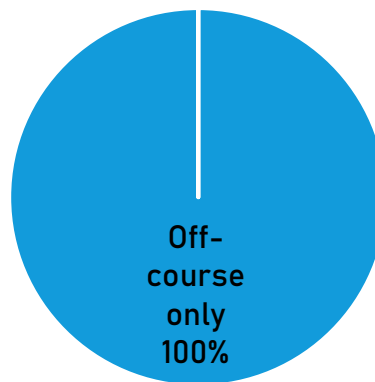
ARCHITYPE ATTRIBUTES | Golfertainment

KEY DESCRIPTORS USED TO DEFINE GROUP

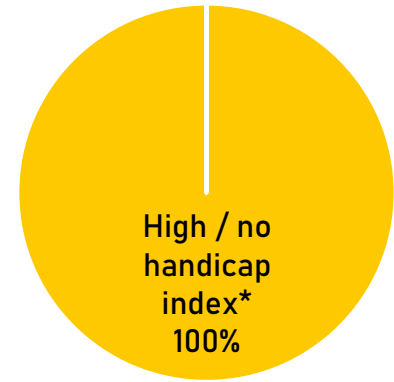
AGE



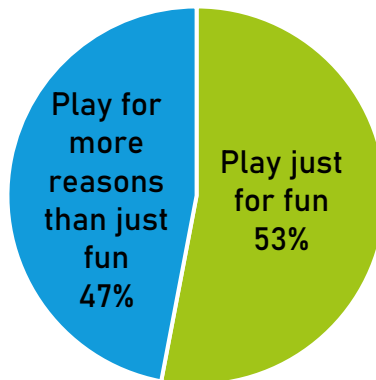
ON/ OFF COURSE



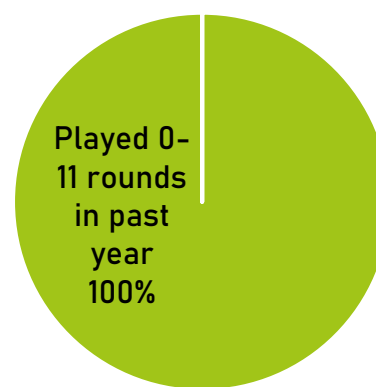
SKILL LEVEL



MOTIVATION



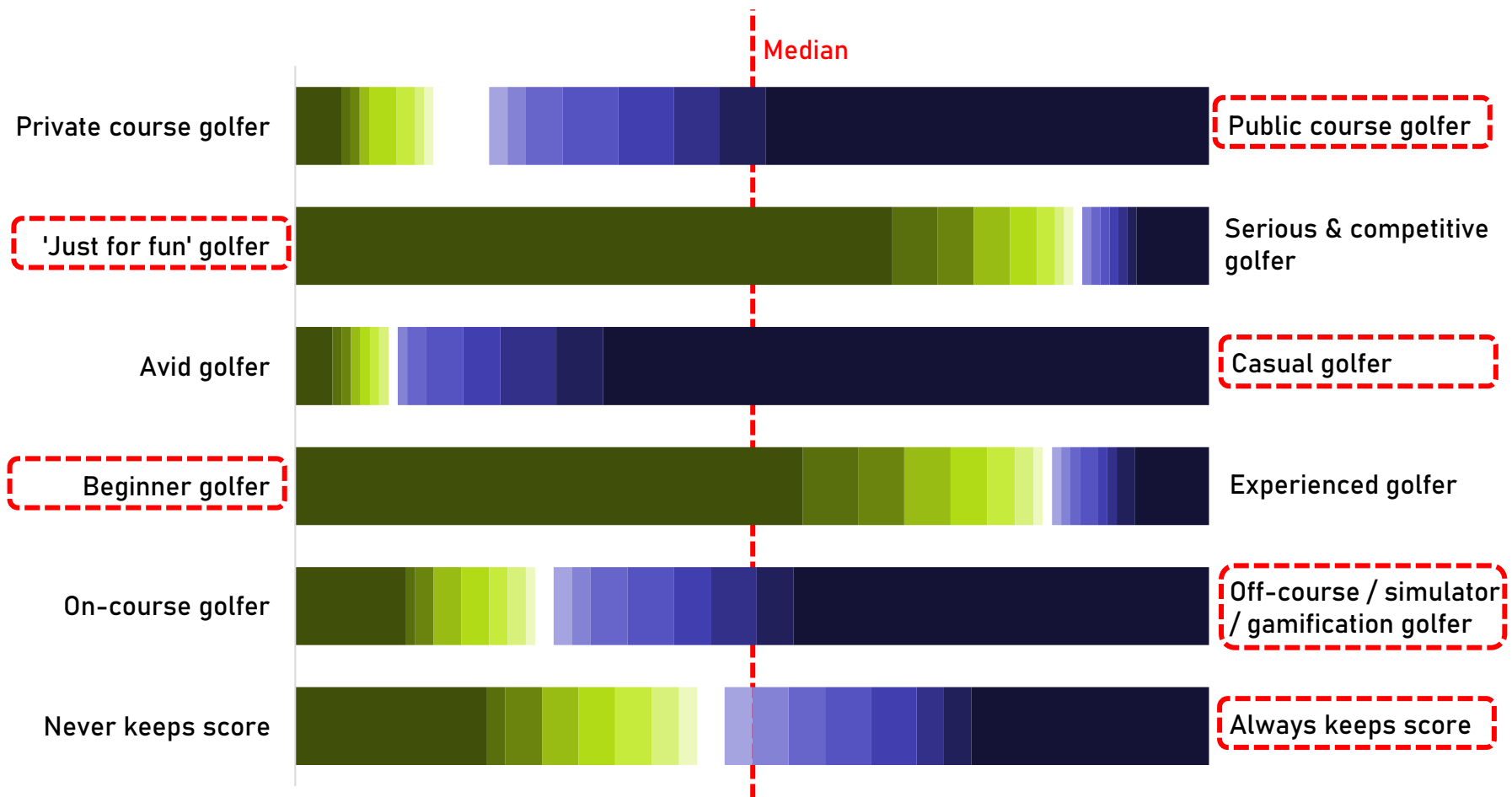
AVIDITY



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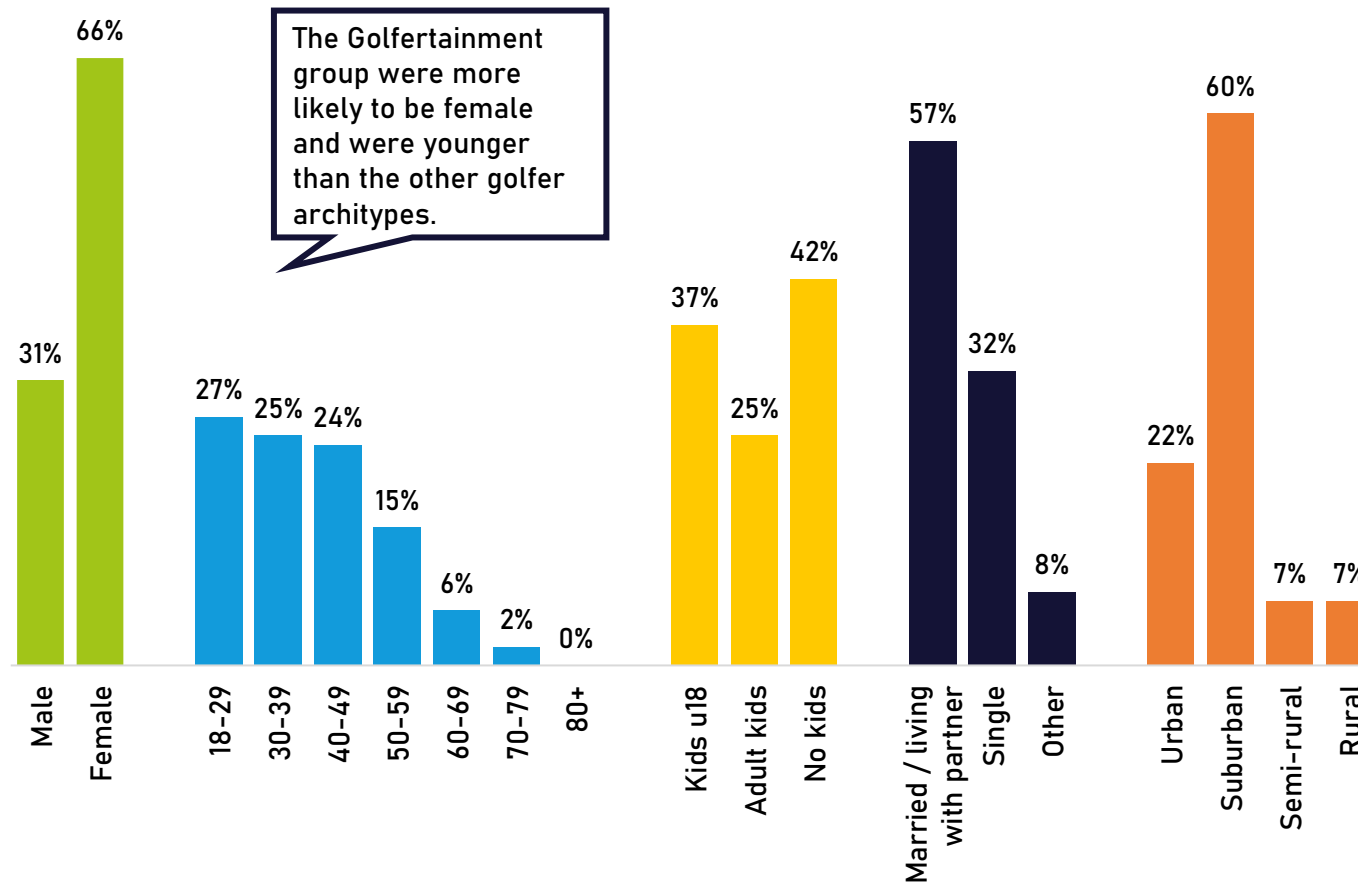
ARCHITYPE ATTRIBUTES | Golfertainment

ARCHITYPE ATTITUDES



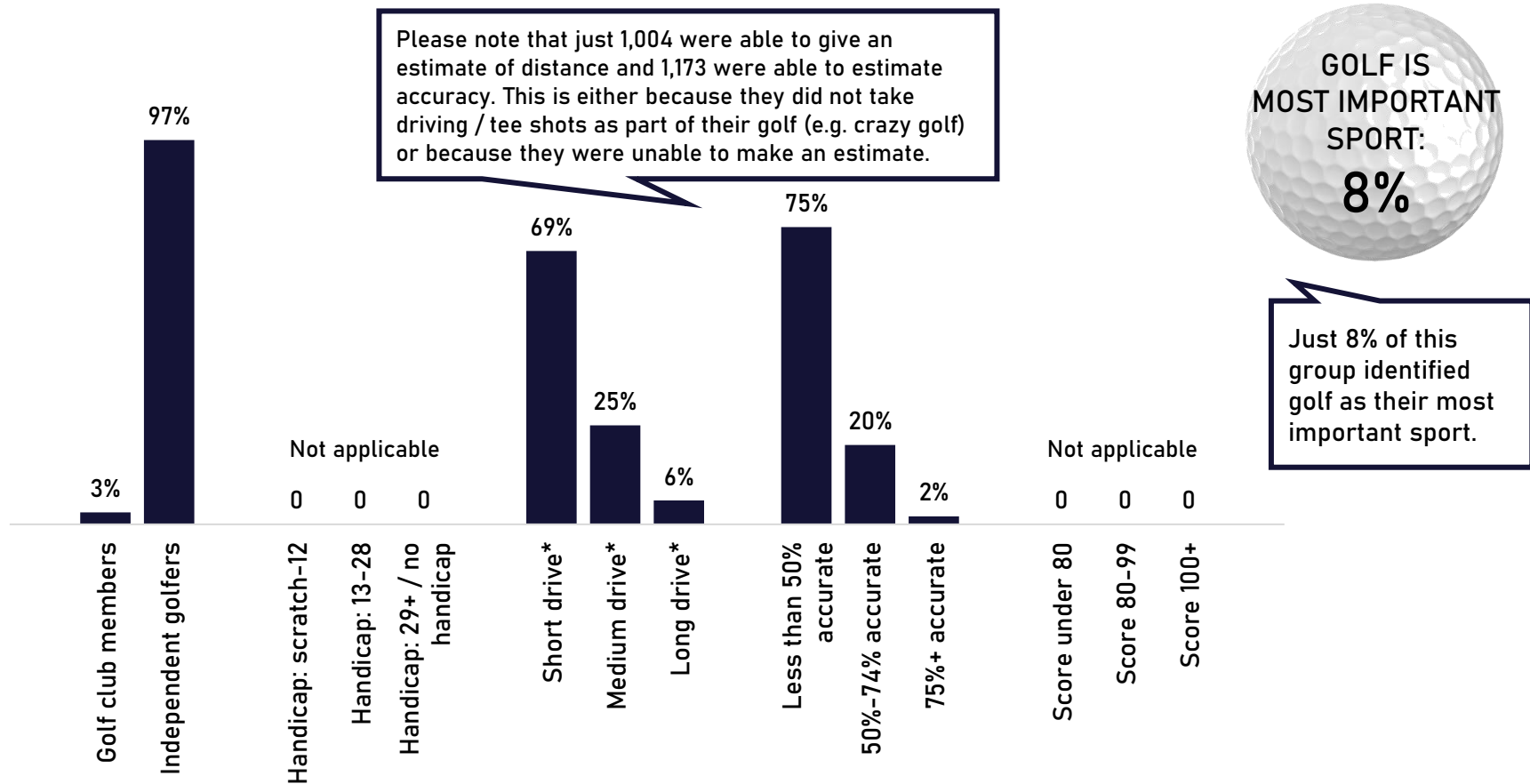
ARCHITYPE ATTRIBUTES | Golfertainment

ARCHITYPE FEATURES: DEMOGRAPHICS



ARCHITYPE ATTRIBUTES | Golfertainment

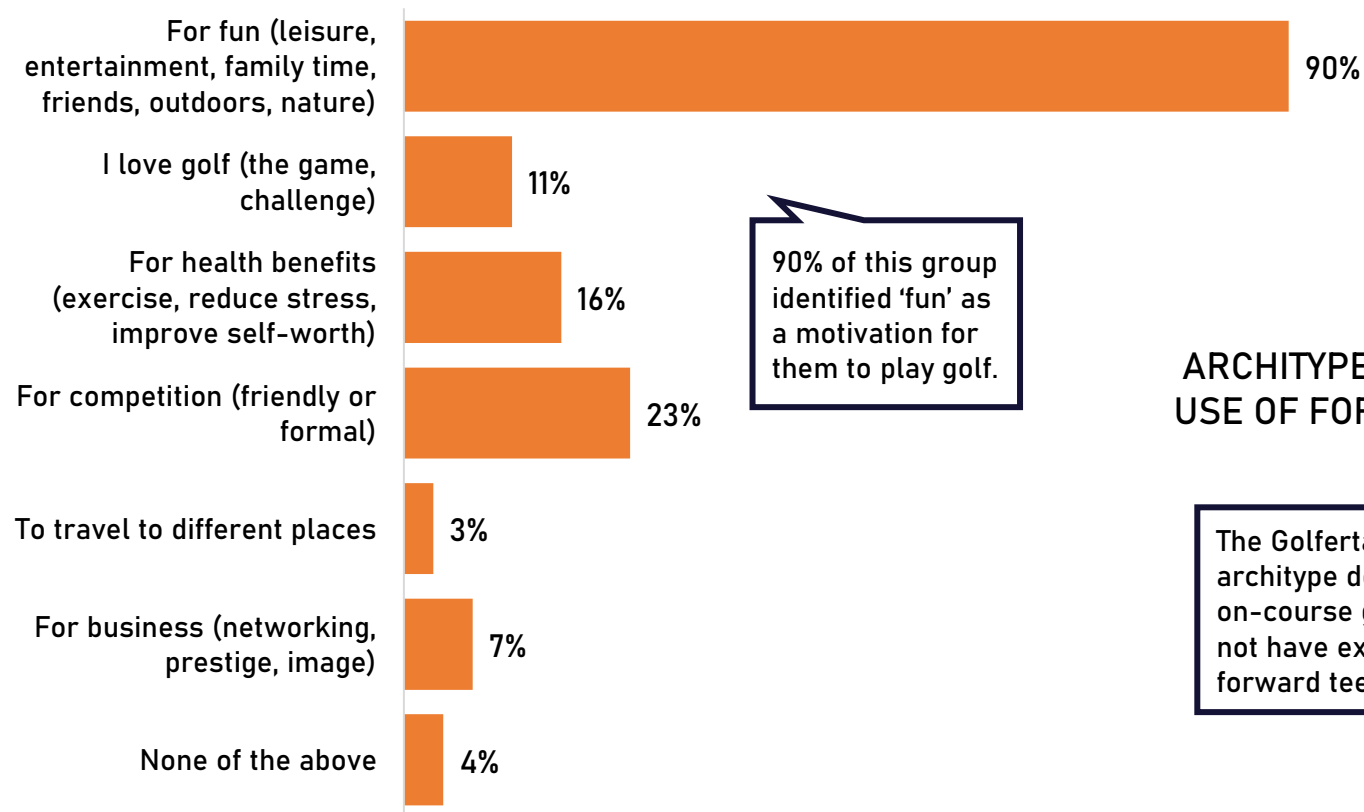
ARCHITYPE FEATURES: GOLF PROFILE



* Short drive = Female <135 yd. / Male <190 yd., Medium drive = Female 135-189 yd. / Male 190-230 yd., Long drive = Female 190+ yd. / Male 231+ yd.

ARCHITYPE ATTRIBUTES | Golfertainment

ARCHITYPE FEATURES: GOLF MOTIVATION



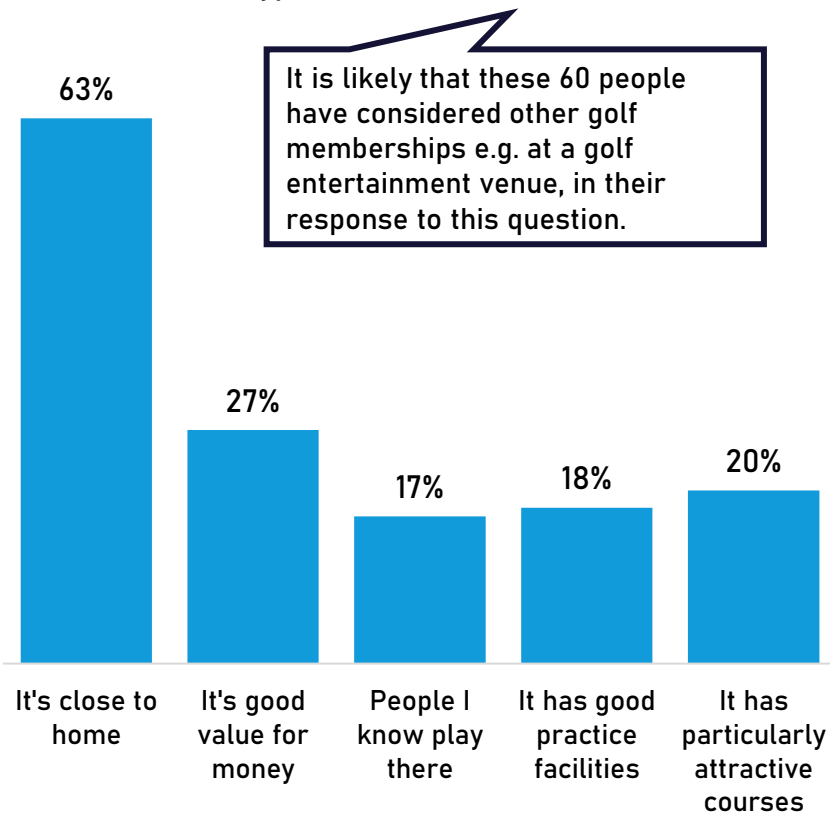
ARCHITYPE FEATURES: USE OF FORWARD TEES

The Golfertainment archetype does not play on-course golf, so will not have experience of forward tees.

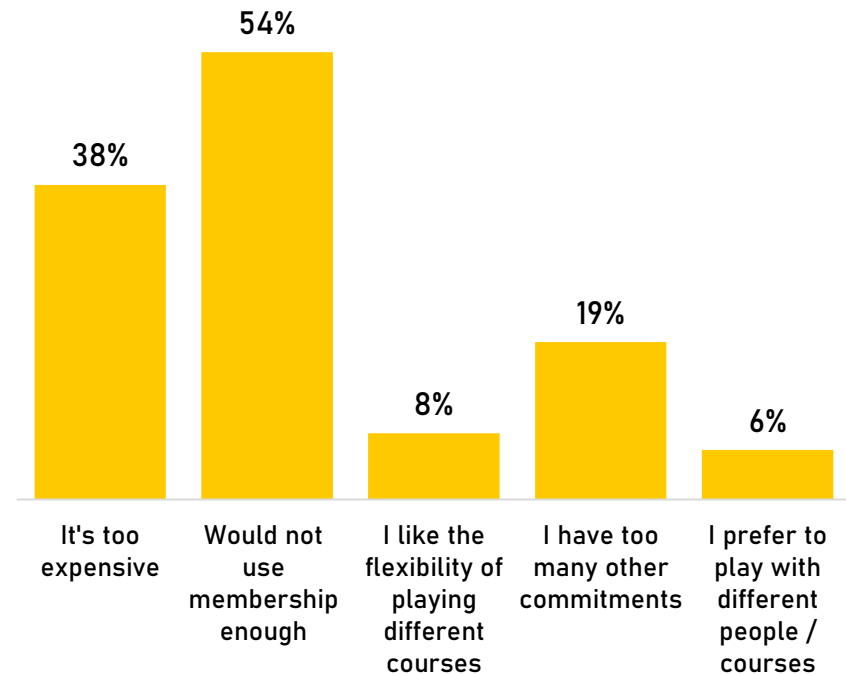
ARCHITYPE ATTRIBUTES | Golfertainment

ARCHITYPE FEATURES: REASONS FOR CLUB MEMBERSHIP AND NON-MEMBERSHIP

■ REASONS FOR MEMBERSHIP - TOP 5
Archetype 9 - Golfertainment (60)



■ REASONS FOR NON-MEMBERSHIP - TOP 5
Archetype 9 - Golfertainment (1735)



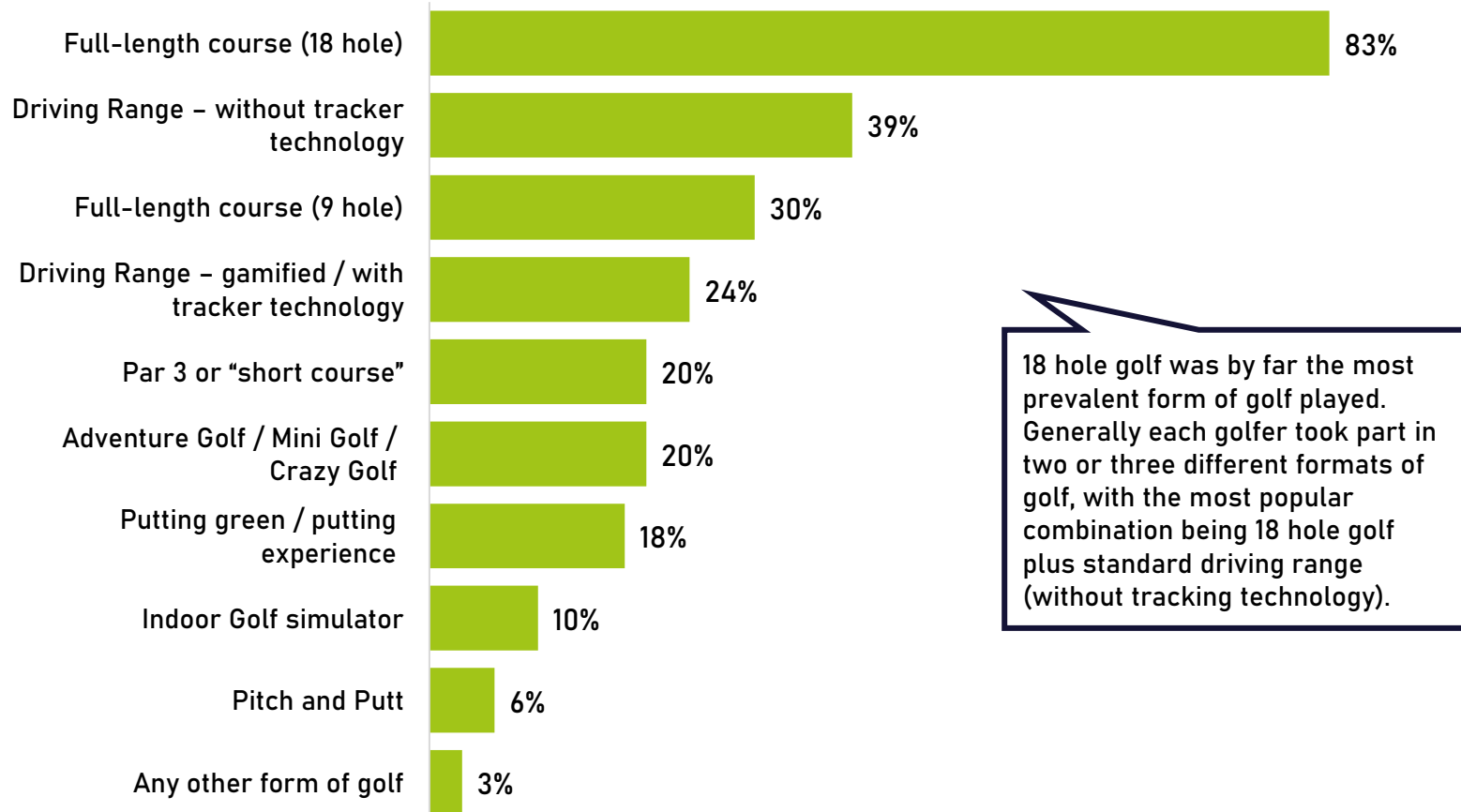
Base numbers shown in brackets

GOLF ENGAGEMENT



GOLF ENGAGEMENT | Types of golf

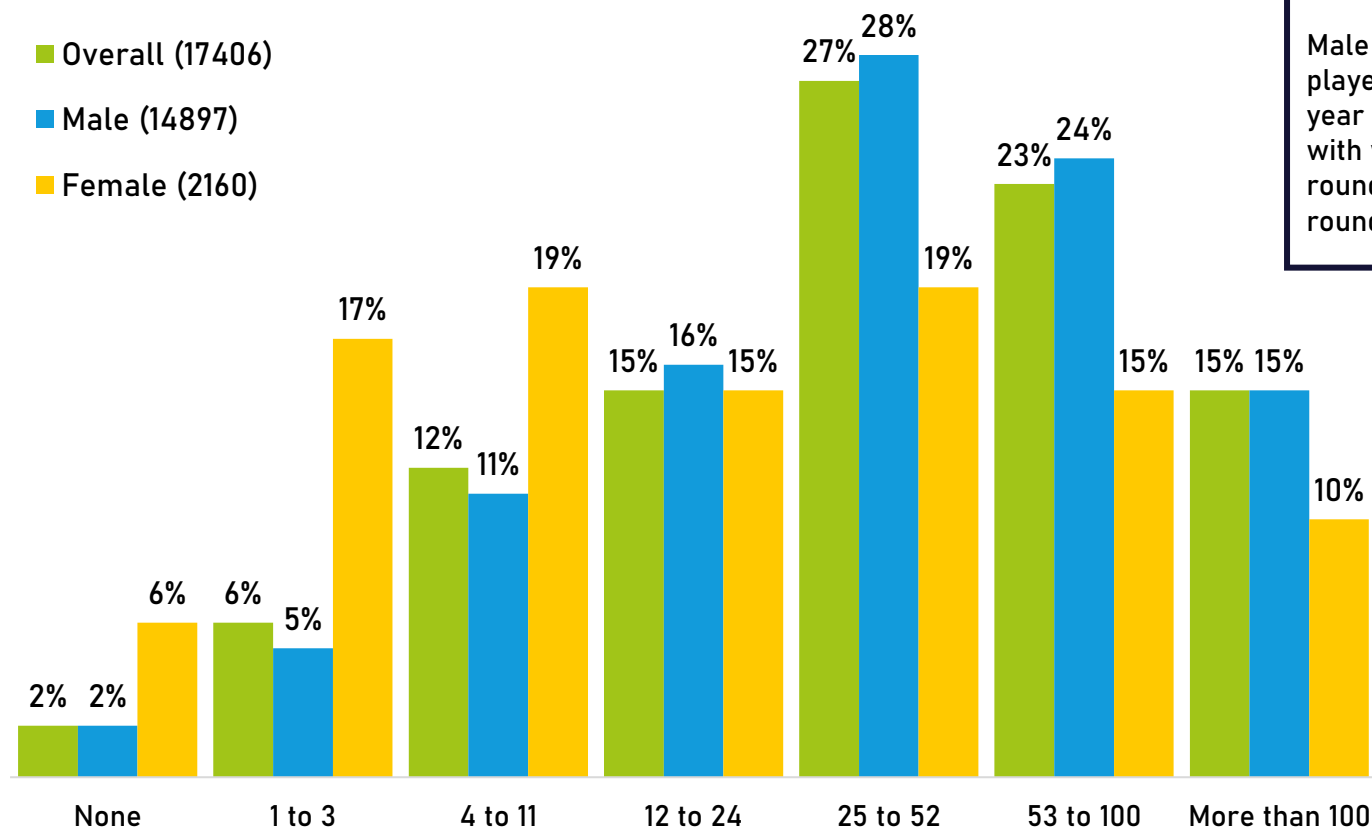
Q. What types of golf do you play?



Base: 20001

GOLF ENGAGEMENT | Number of rounds

Q. Approximately how many rounds of golf have you played in the last 12 months?

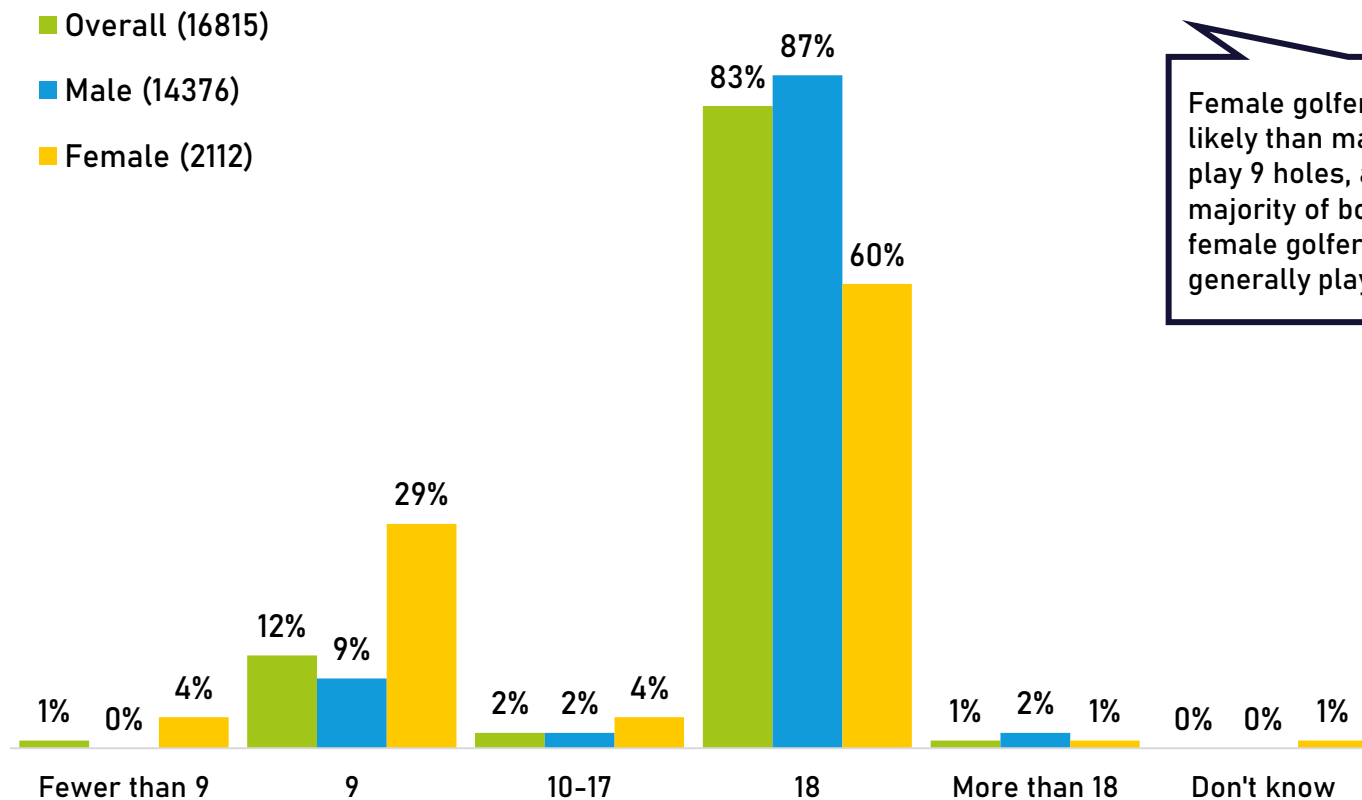


Male golfers generally had played more golf in the last year than female golfers, with women averaging 36 rounds, compared to 51 rounds on average for men.

Base numbers shown in brackets

GOLF ENGAGEMENT | Number of holes

Q. How many holes do you typically play?



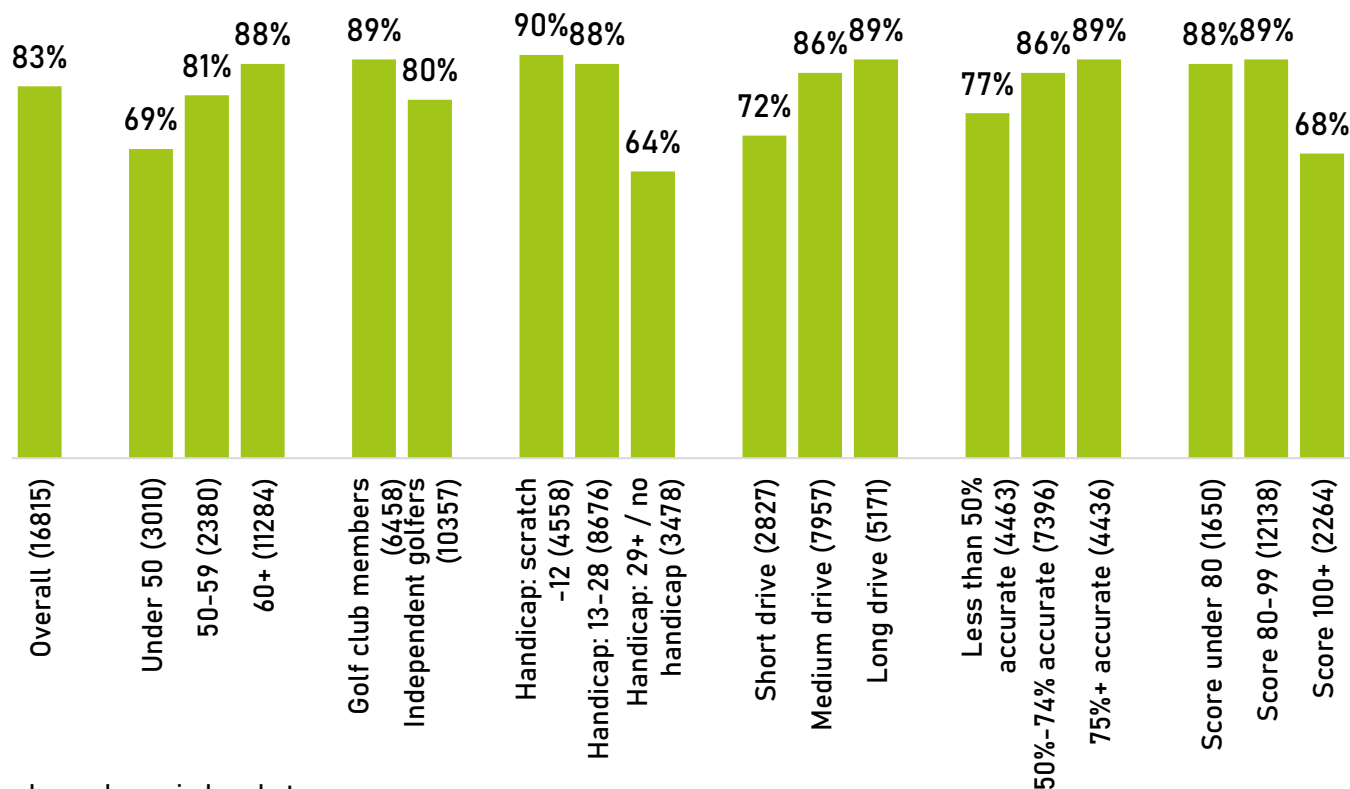
Female golfers were more likely than male golfers to play 9 holes, although the majority of both male and female golfer groups did generally play 18 holes.

Base numbers shown in brackets

GOLF ENGAGEMENT | Proportion playing 18 holes

Q. How many holes do you typically play?

■ Typically play 18 holes

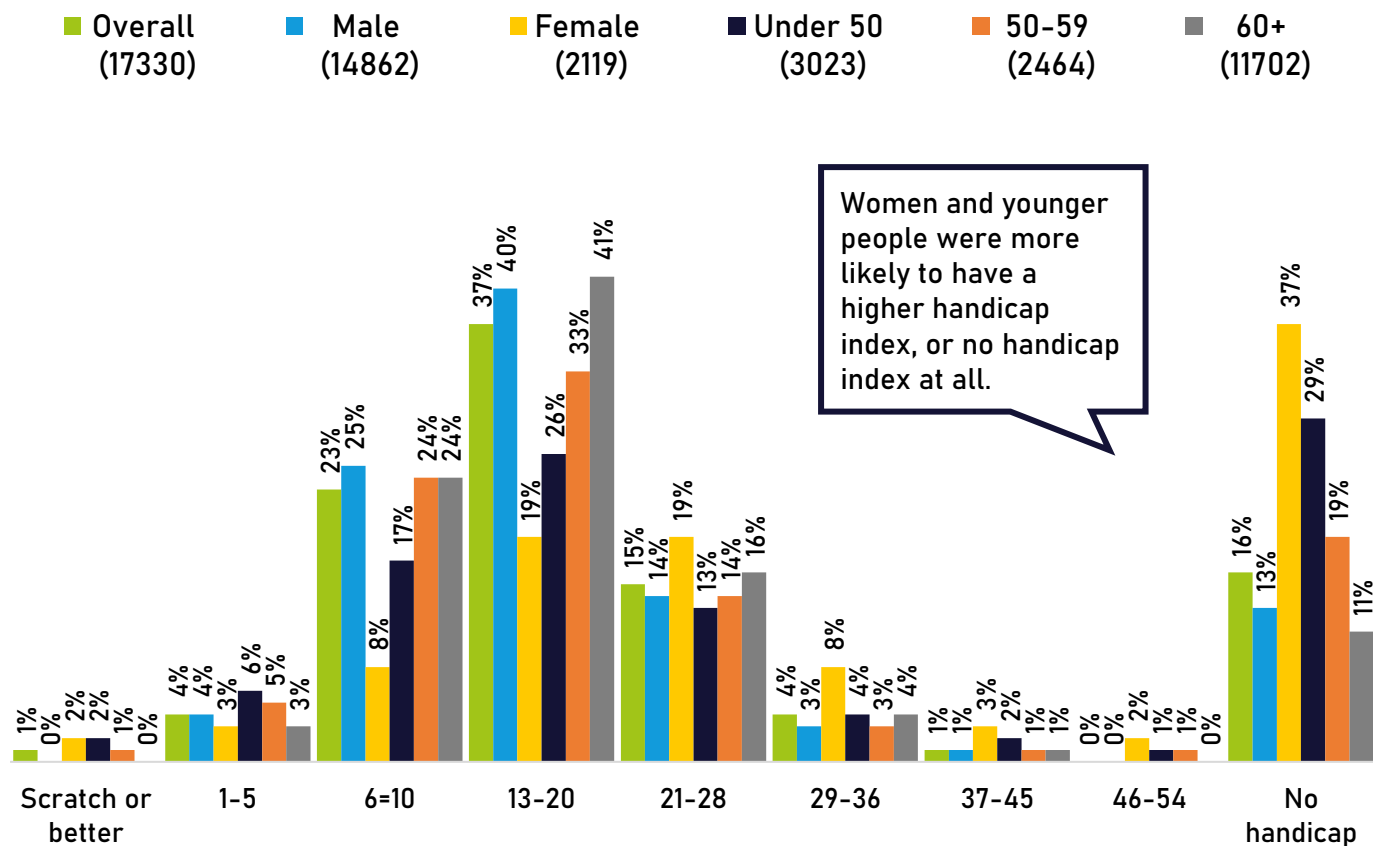


Although 18 hole golf was played by the majority, older golfers, better golfers, golfers with longer drives and more accurate golfers were more likely to typically play 18 holes.

Base numbers shown in brackets

GOLF ENGAGEMENT | Handicap index

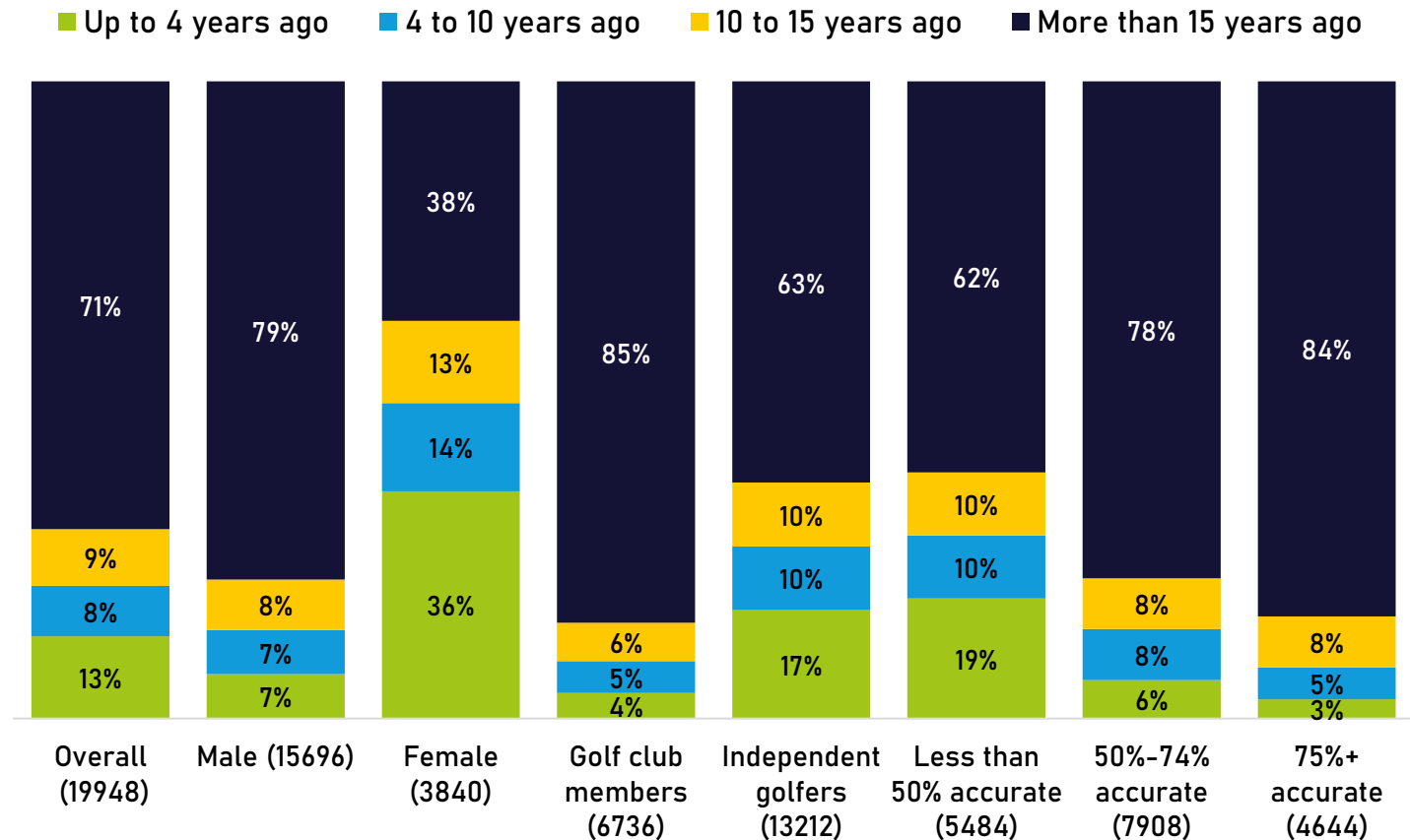
Q. What is your Handicap Index, if you have one?



Base numbers shown in brackets

GOLF ENGAGEMENT | Golf experience level

Q. When did you start playing golf?

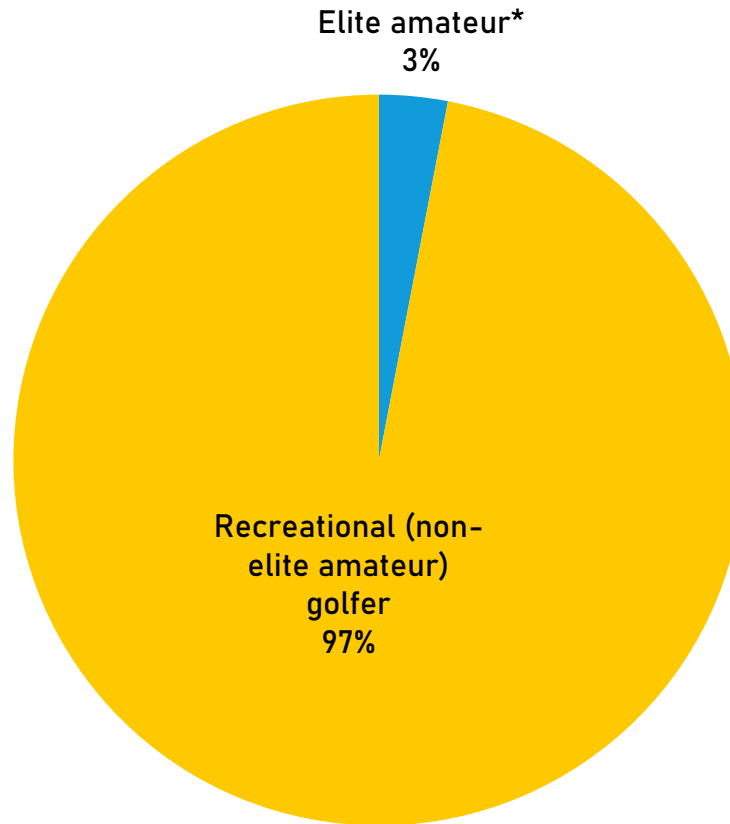


Golfers were very personally invested in golf, with 71% having started to play more than 15 years ago. There is however a substantial group of female golfers coming through who have played for less than four years – 36% of female golfers in the sample fell into this group.

Base numbers shown in brackets

GOLF ENGAGEMENT | Level of play

Q. How would you describe your level of golf play?



The vast majority identified themselves as recreational golfers.

Base: 17378

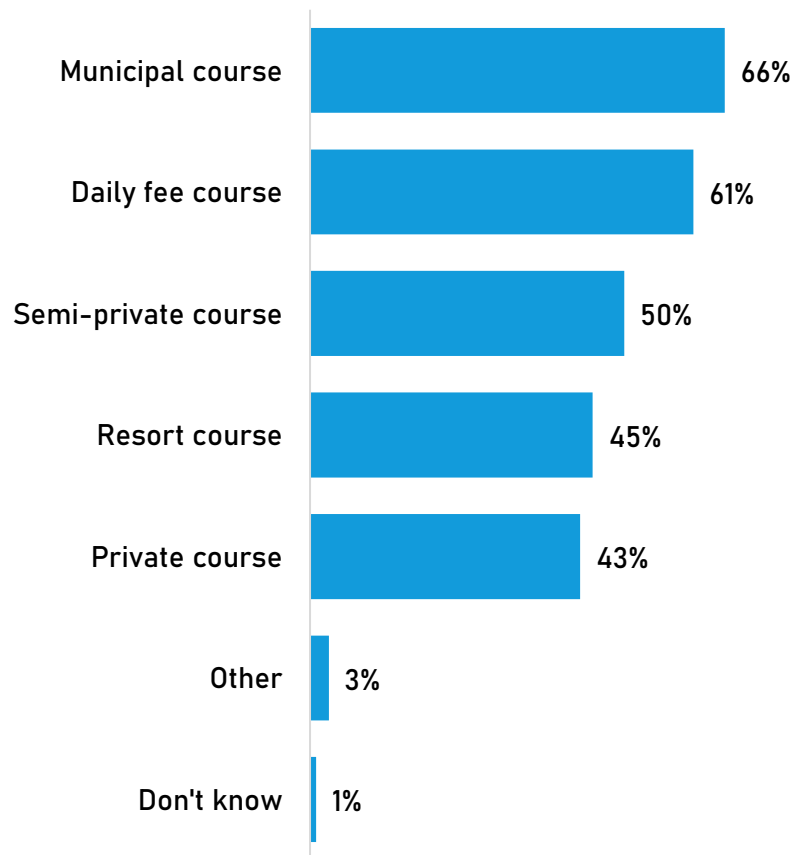
* A golfer who plays in regional, state or national gross score championships

GOLF ENGAGEMENT | Golf facilities

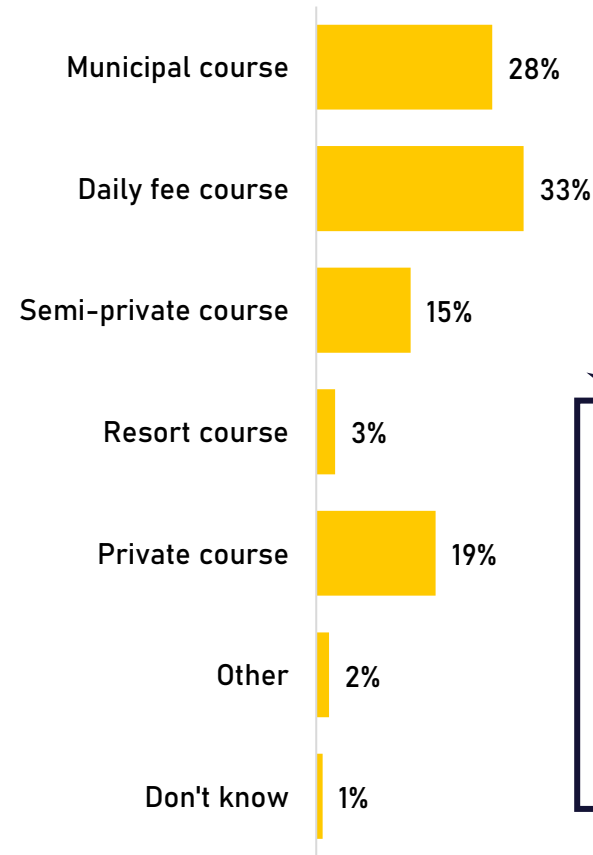
Q. What types of golf facilities have you played at in the last 12 months?

Q. And what type of golf facility have you played at the most in the last 12 months?

All facilities in last 12 months (17374)



Most-used facility in last 12 months (17314)

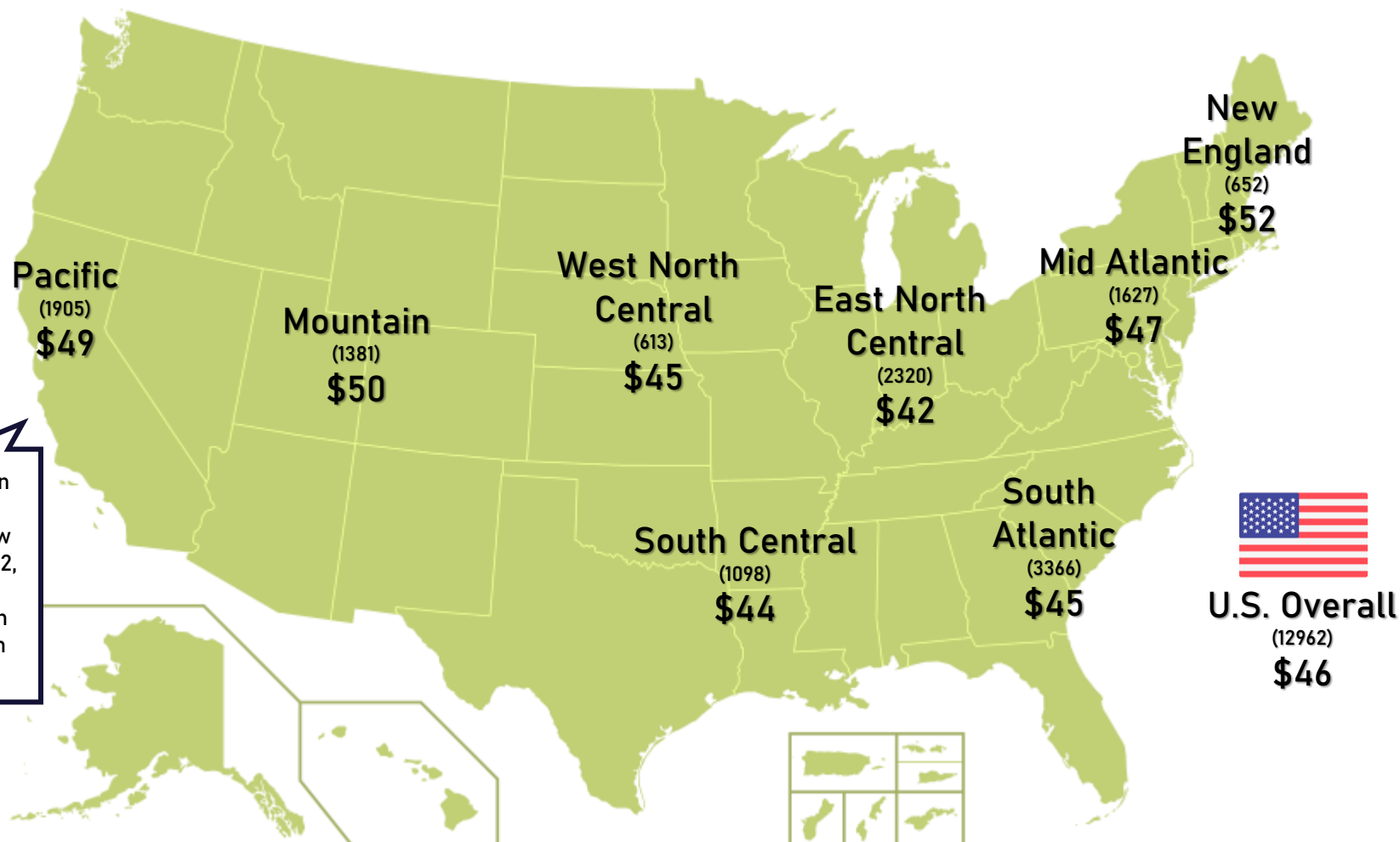


The majority had played at municipal courses and daily fee courses over the last 12 months. Of the 43% who had played at a private course, 43% of these had played *most* at a private course.

Base numbers shown in brackets

GOLF ENGAGEMENT | Typical green fee

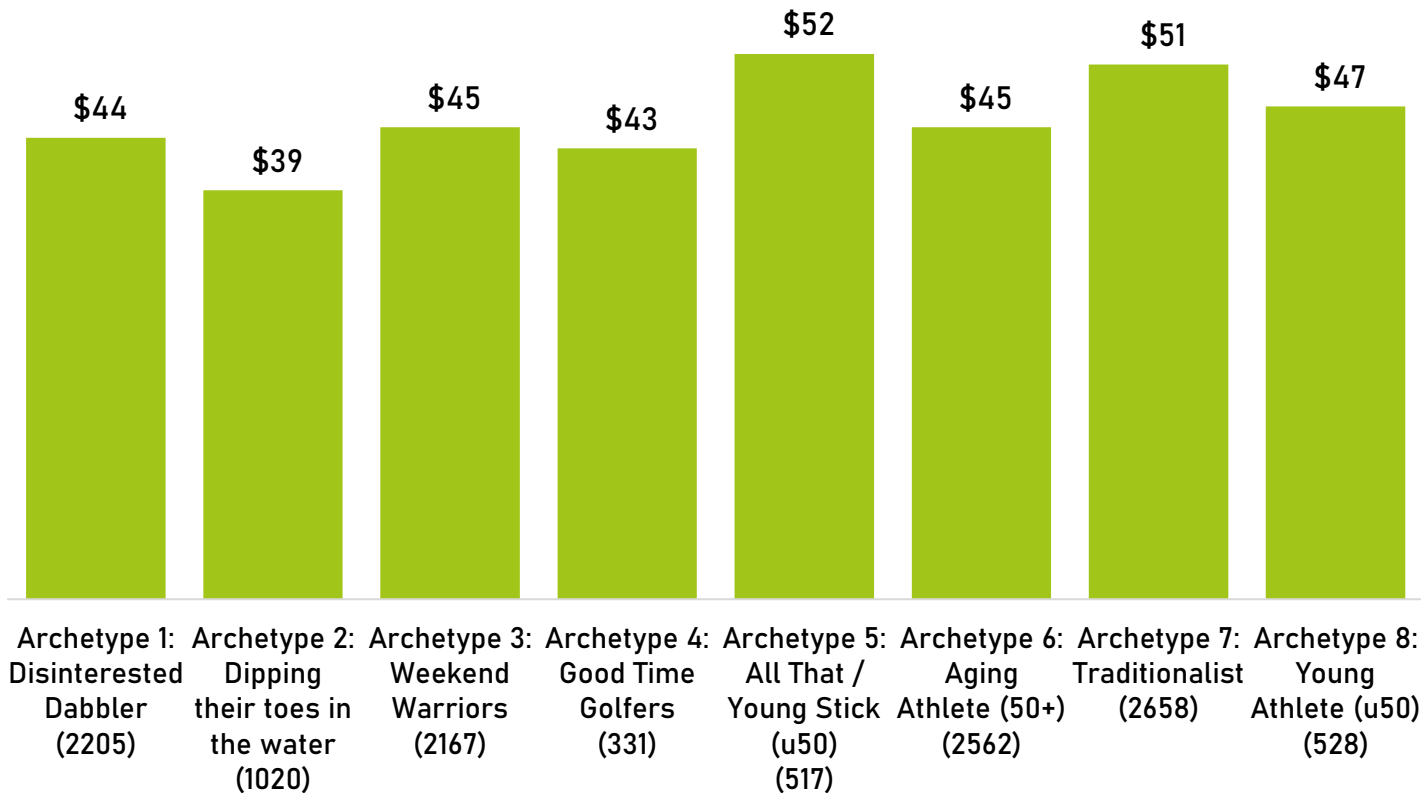
Q. What would be the typical green fee that you pay for one round of golf?



Base numbers shown in brackets – Regions reflect standard NGF regions for golf

GOLF ENGAGEMENT | Typical green fee

Q. What would be the typical green fee that you pay for one round of golf?

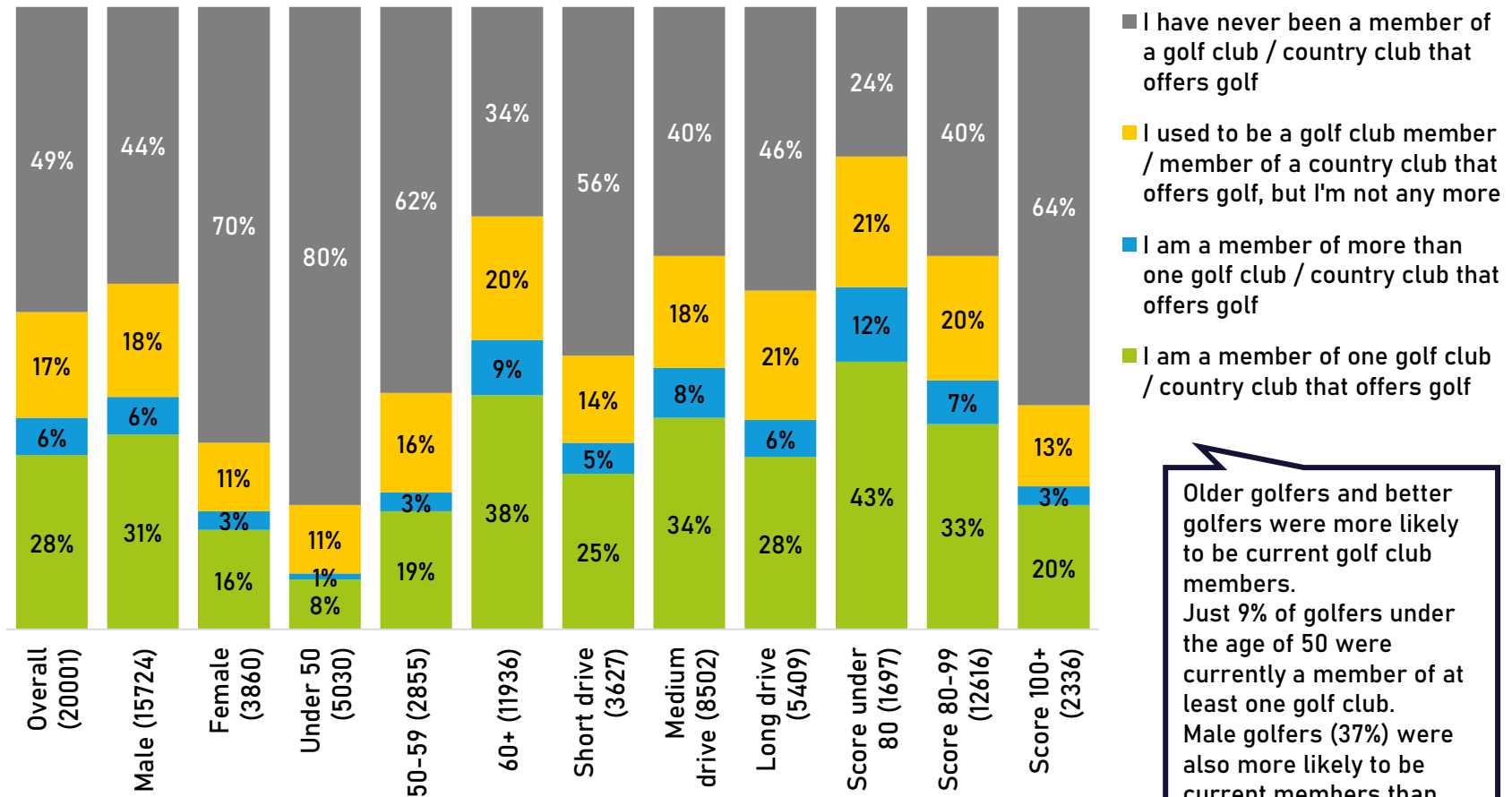


Golfers in the more 'serious' golfer archetypes were likely to spend more on green fees, with All That / Young Stick and Traditionalist golfers paying more than \$50 on average.

Base numbers shown in brackets Base: 20001 – Regions reflect standard NGF regions for golf

GOLF ENGAGEMENT | Club membership

Q. Are you a member of a golf club?



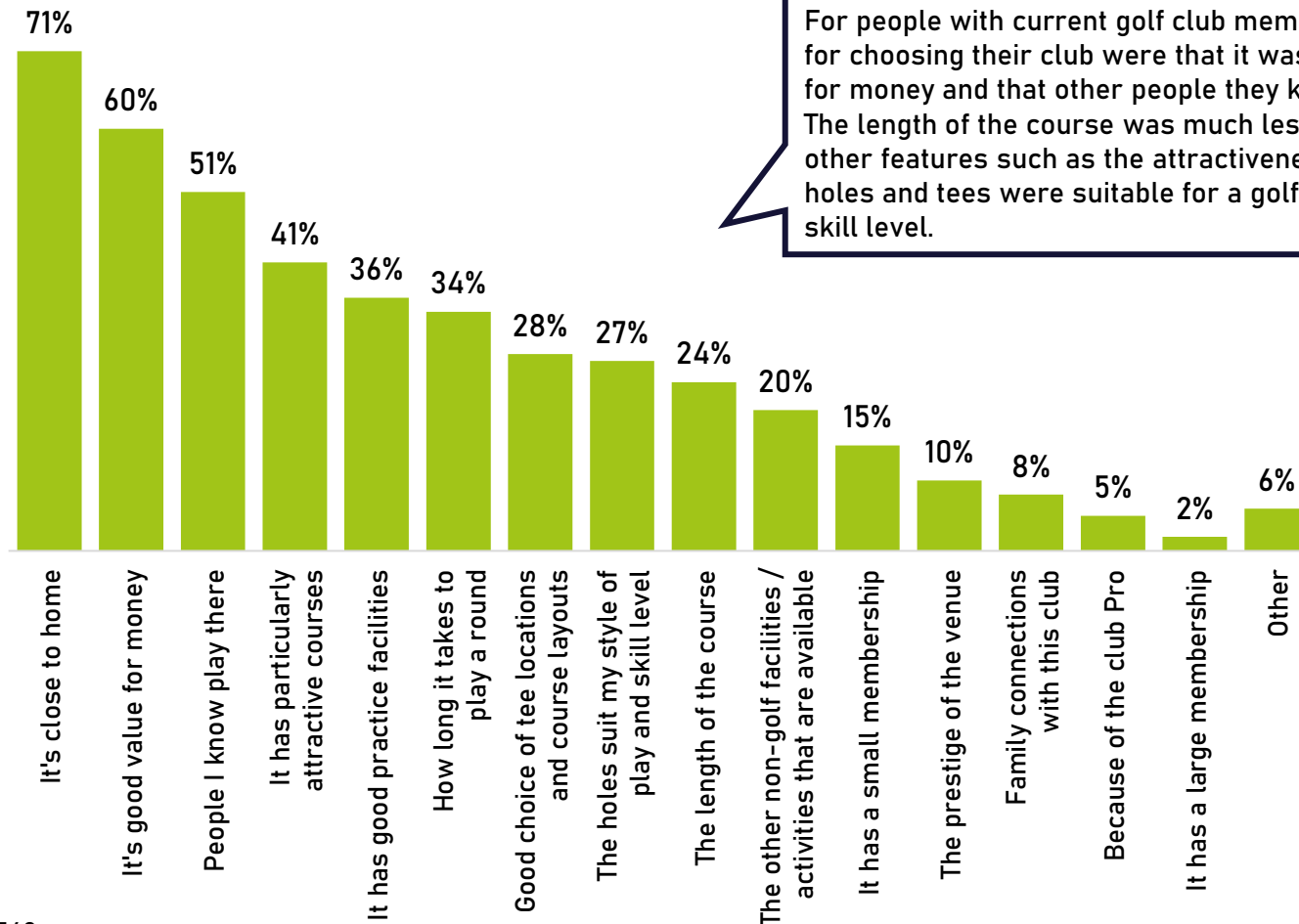
- I have never been a member of a golf club / country club that offers golf
- I used to be a golf club member / member of a country club that offers golf, but I'm not any more
- I am a member of more than one golf club / country club that offers golf
- I am a member of one golf club / country club that offers golf

Older golfers and better golfers were more likely to be current golf club members. Just 9% of golfers under the age of 50 were currently a member of at least one golf club. Male golfers (37%) were also more likely to be current members than female golfers (19%).

Base numbers shown in brackets

GOLF ENGAGEMENT | Reasons for club membership

Q. Thinking about your main golf club, why did you choose to be a member of that particular club?

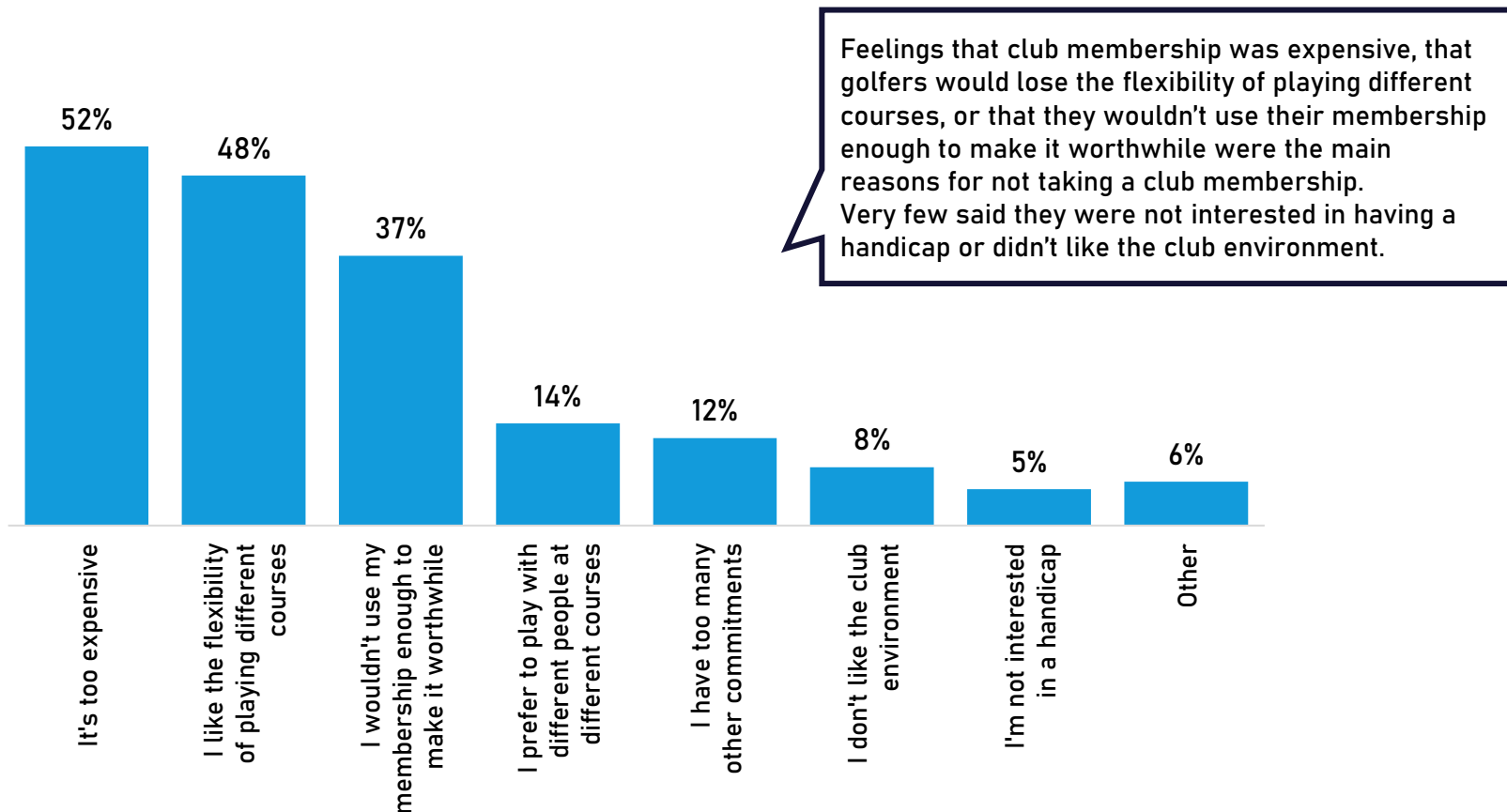


For people with current golf club memberships, the main reasons for choosing their club were that it was close to home, good value for money and that other people they knew played there. The length of the course was much less of a motivator to join than other features such as the attractiveness of the course or that the holes and tees were suitable for a golfer's own style of play and skill level.

Base: 4742

GOLF ENGAGEMENT | Reasons for club non-membership

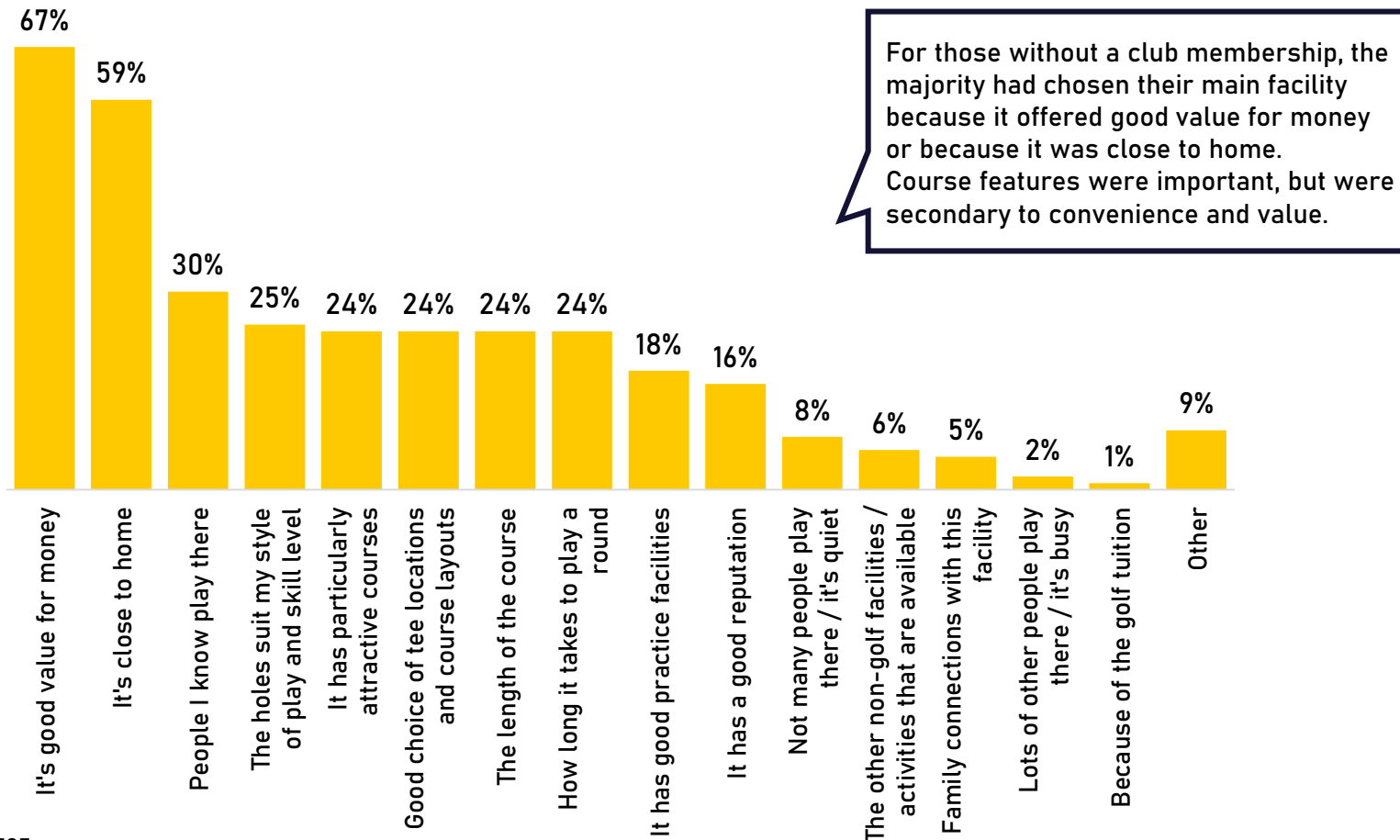
Q. Why do you choose not to be a member of a golf club?



Base: 8751

GOLF ENGAGEMENT | Reasons for main facility choice

Q. Thinking about the golf facility you play at most often, why do you choose to play there? ASKED TO NON-MEMBERS ONLY



Base: 8725

GOLF ENGAGEMENT | Annual golf spend

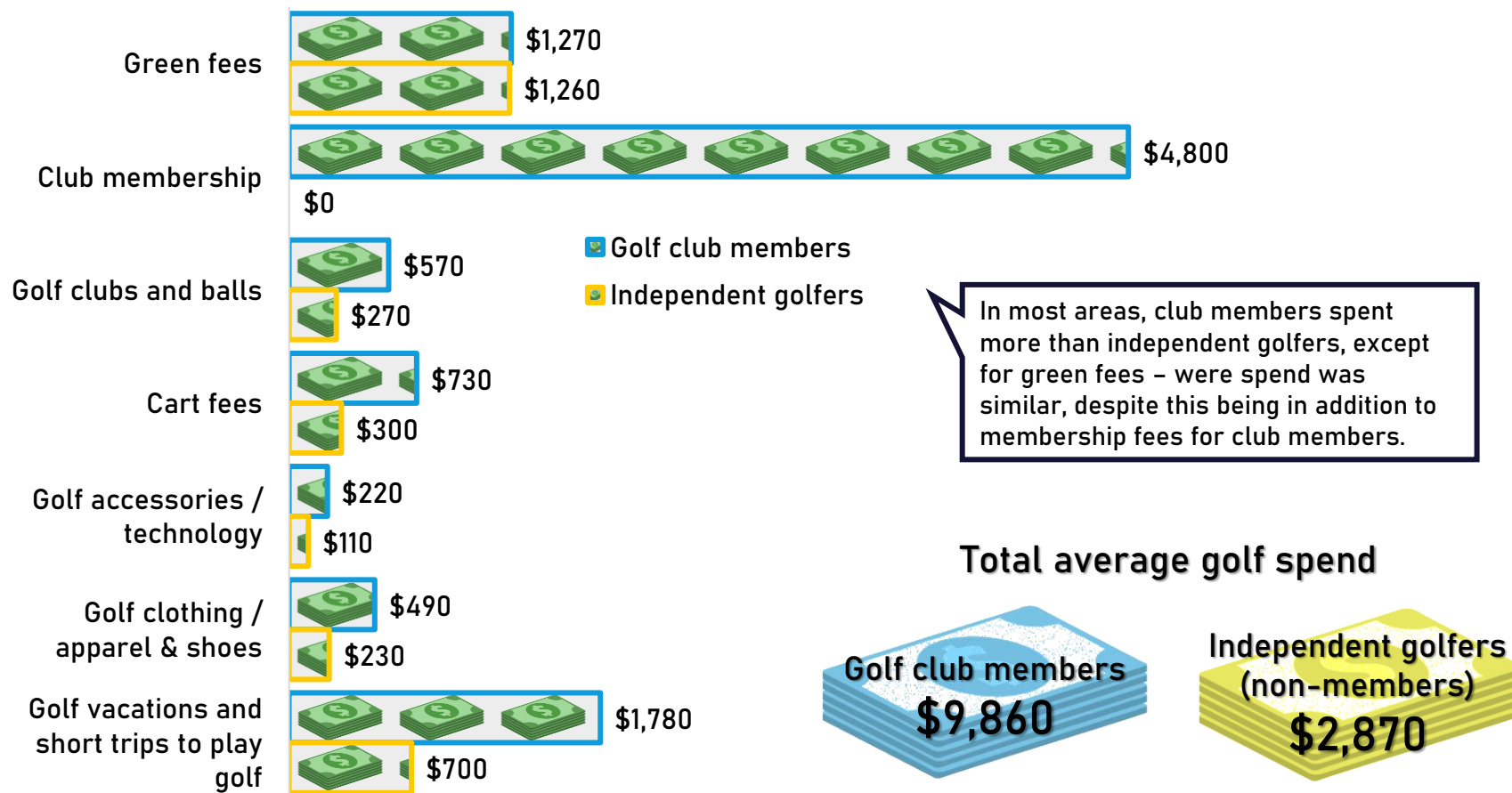
Q. On average over the course of a normal year, how much do you spend on the following...



Base: 867

GOLF ENGAGEMENT | Annual golf spend – by membership

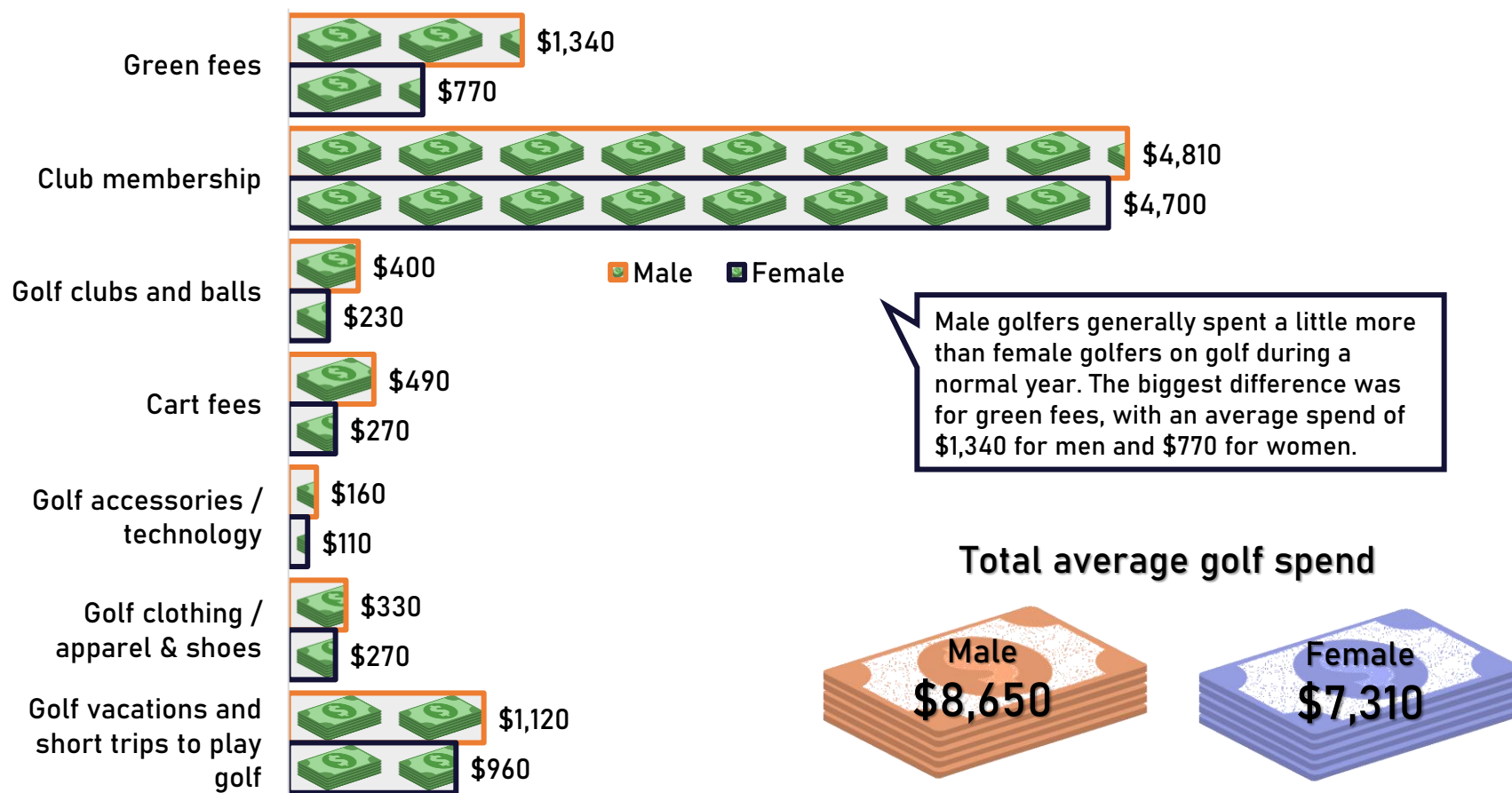
Q. On average over the course of a normal year, how much do you spend on the following...



Base: 867

GOLF ENGAGEMENT | Annual golf spend – by gender

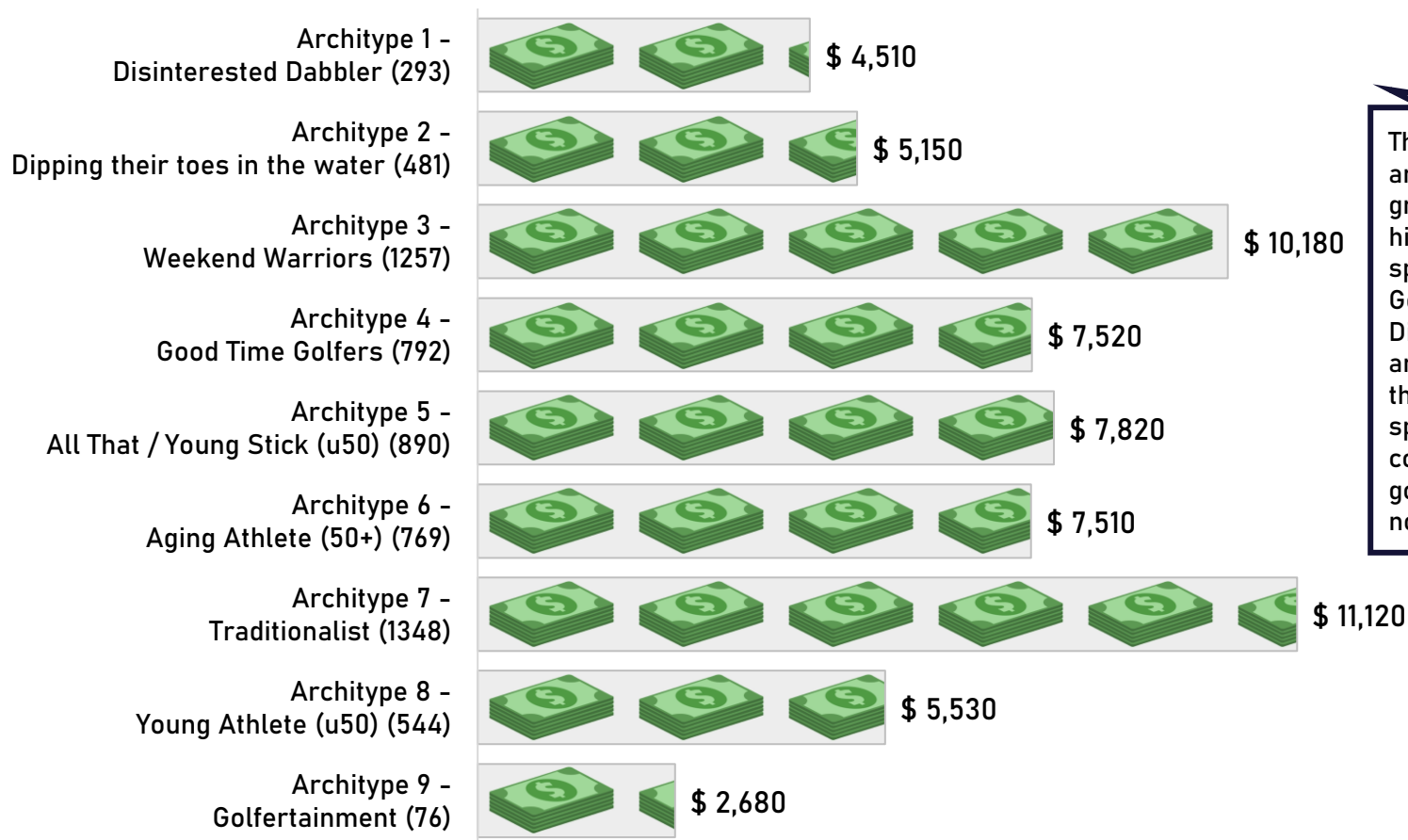
Q. On average over the course of a normal year, how much do you spend on the following...



Base: 867

GOLF ENGAGEMENT | Annual golf spend – by archetype

Q. On average over the course of a normal year, how much do you spend on the following...



The Weekend Warrior and Traditionalist groups indicated the highest level of average spend, with the Golfertainment, Disinterested Dabbler and Dipping their toes in the water golfer groups spending a more conservative amount on golf in the course of a normal year.

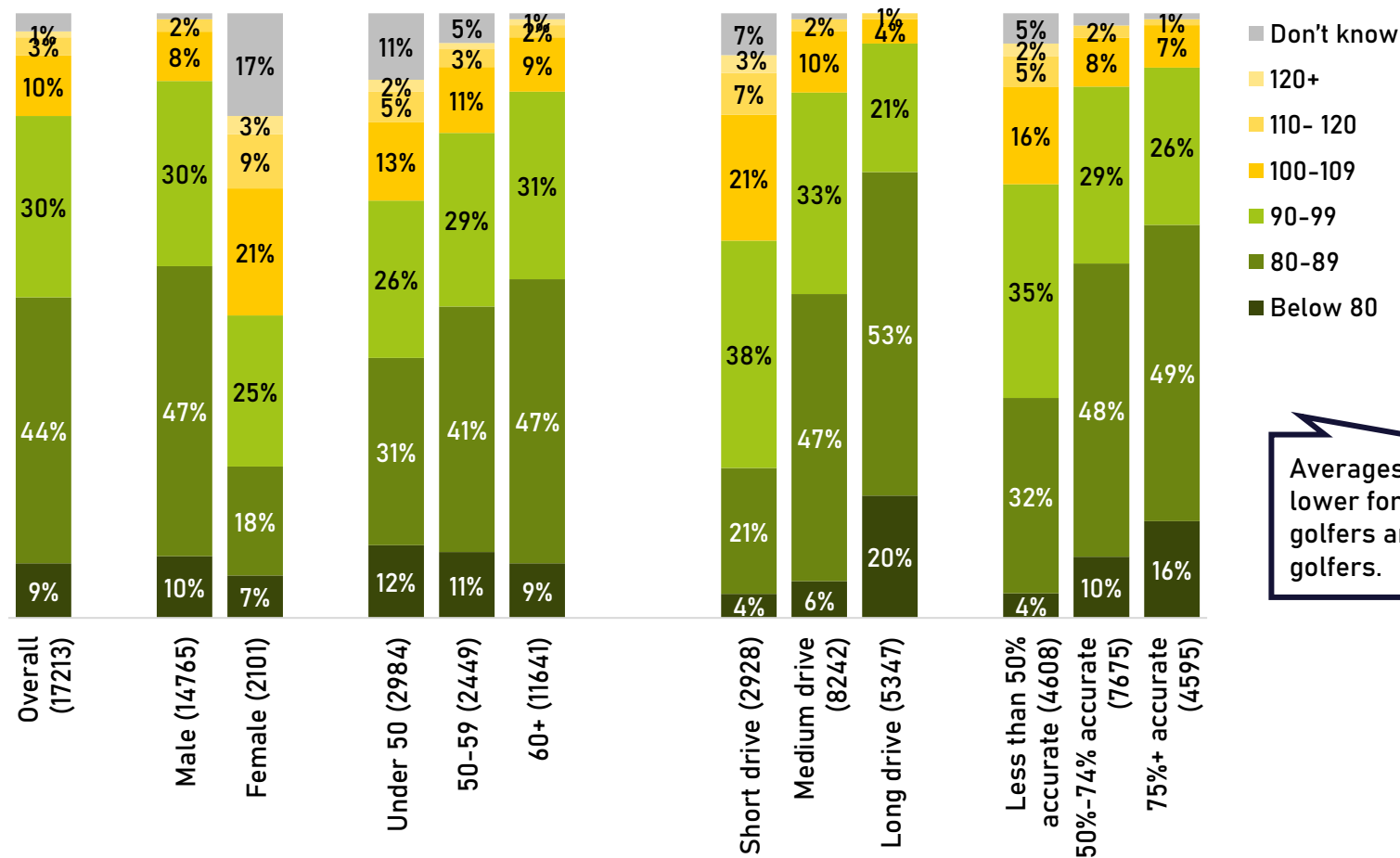
Base numbers shown in brackets

DISTANCE & ACCURACY



DISTANCE & ACCURACY | Typical score

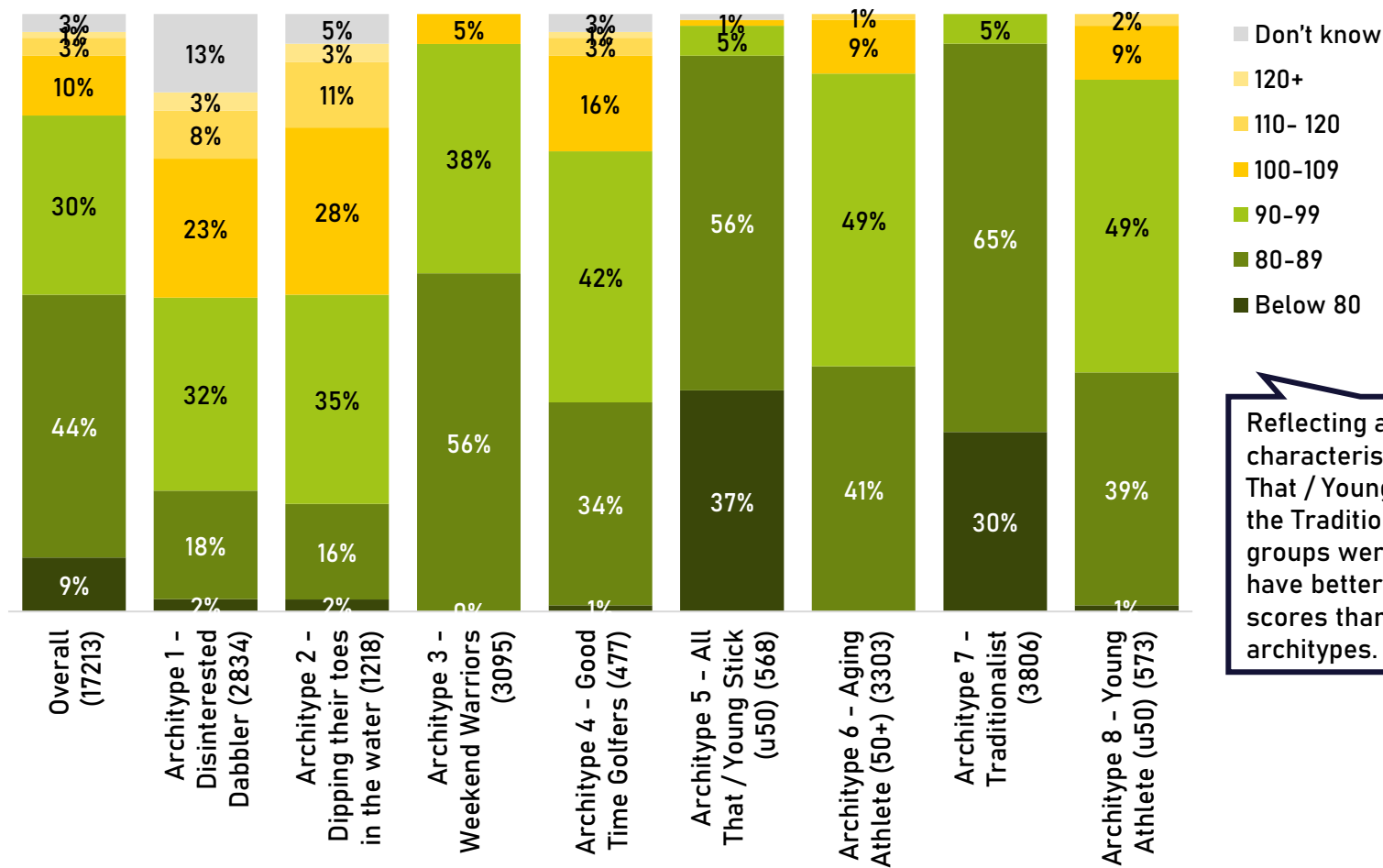
Q. What score do you typically shoot on a par-72 golf course?



Base numbers shown in brackets

DISTANCE & ACCURACY | Typical score – by archetype

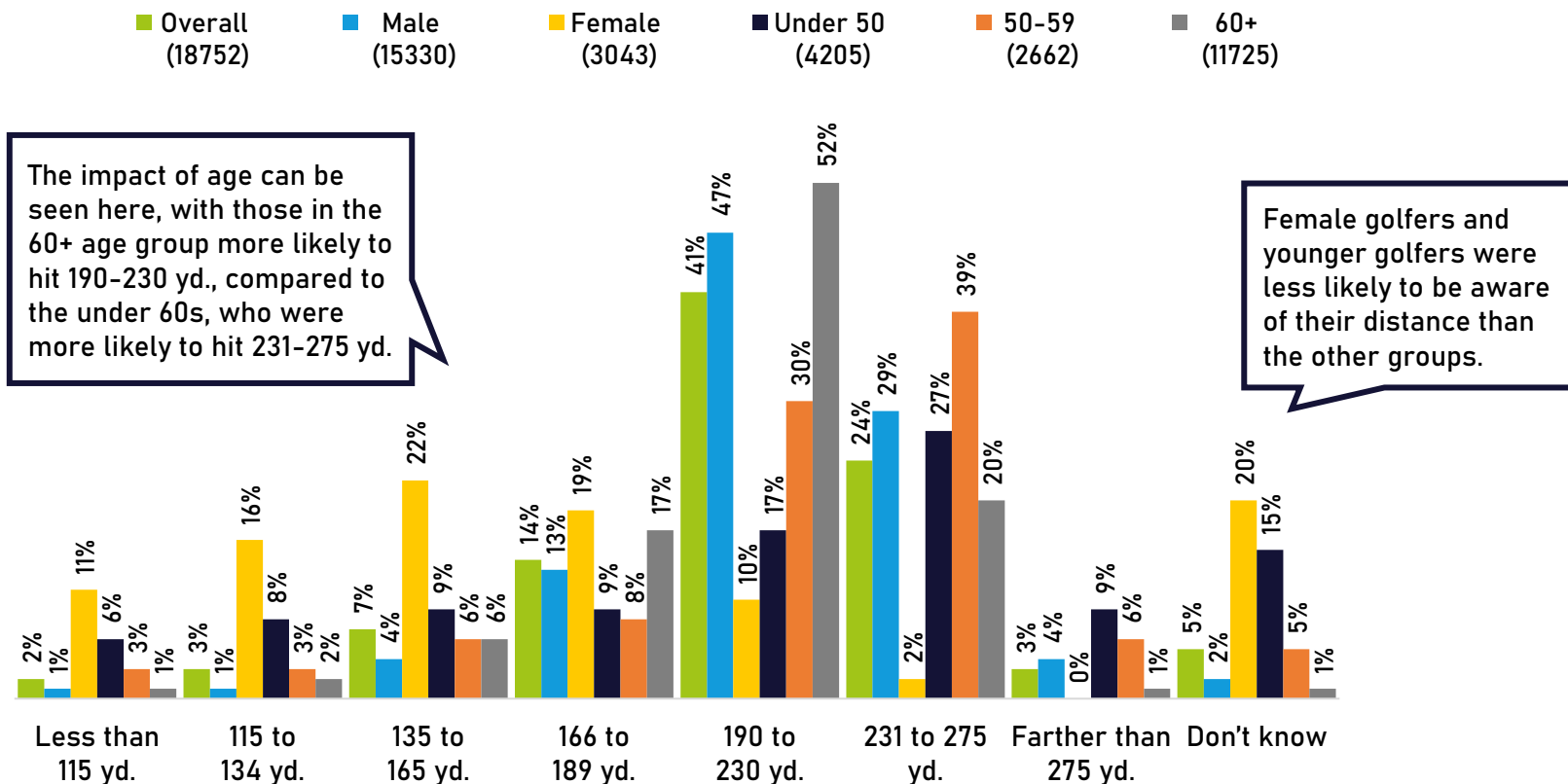
Q. What score do you typically shoot on a par-72 golf course?



Base numbers shown in brackets

DISTANCE & ACCURACY | Driver / tee shot distance

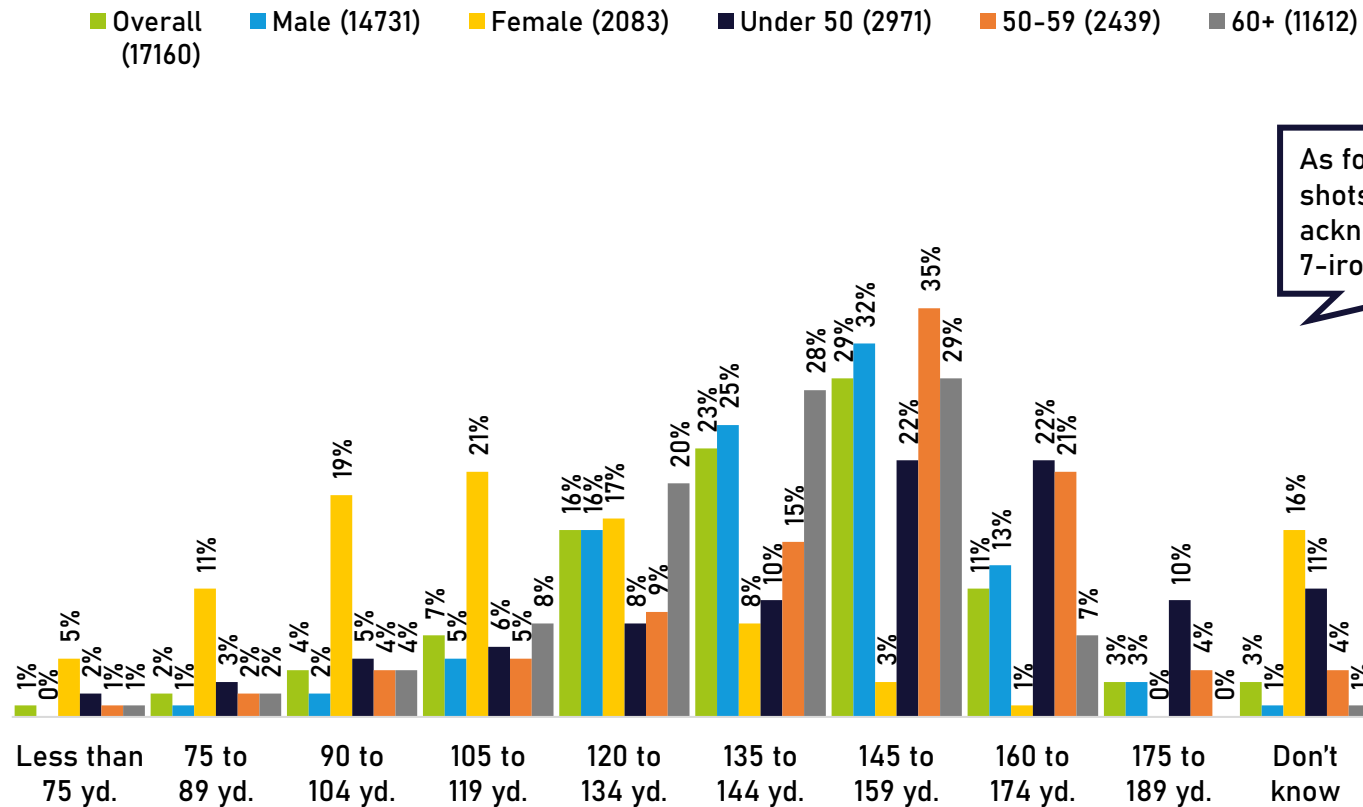
Q. How far do your driver / tee shots typically travel (carry plus roll)?



Base numbers shown in brackets

DISTANCE & ACCURACY | 7-iron distance

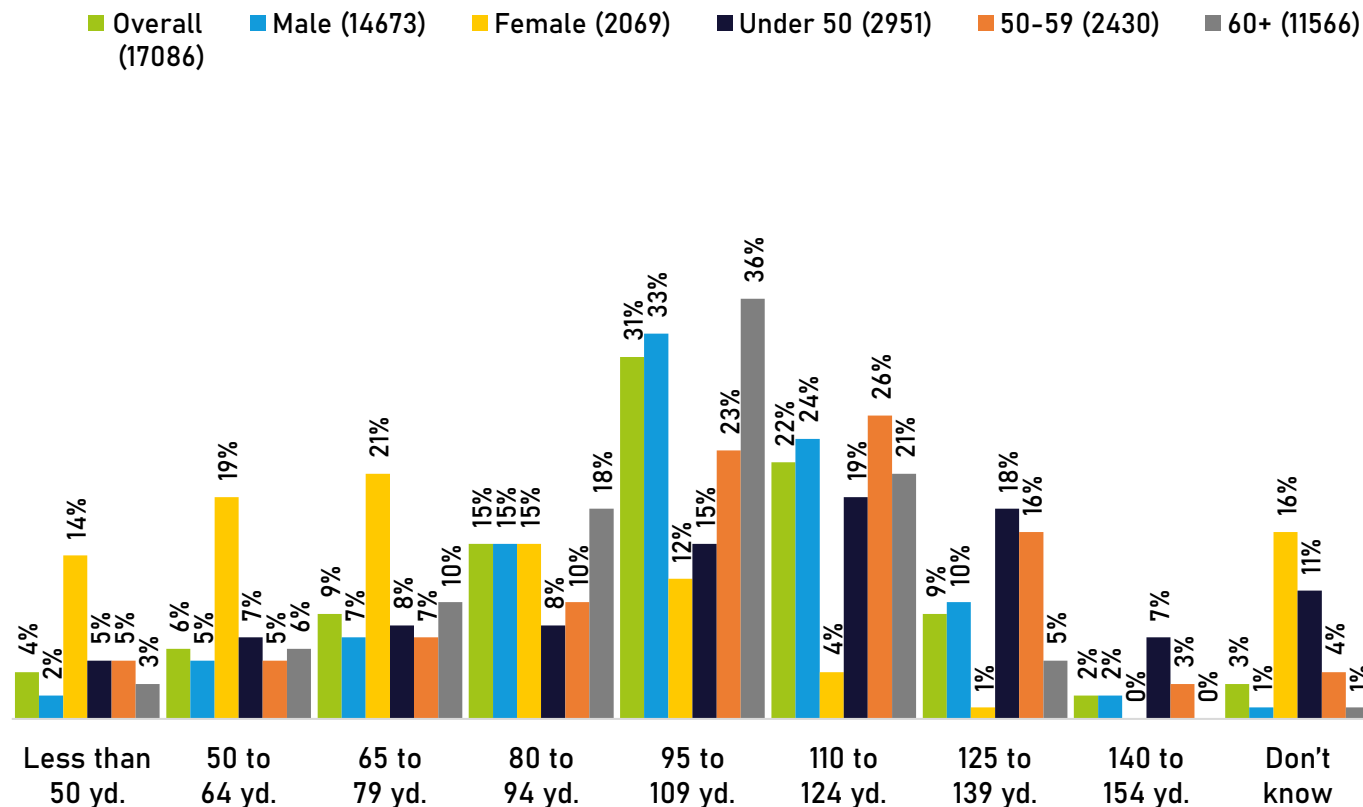
Q. How far on average do your 7-iron shots travel (carry plus roll)?



Base numbers shown in brackets

DISTANCE & ACCURACY | Pitching wedge distance

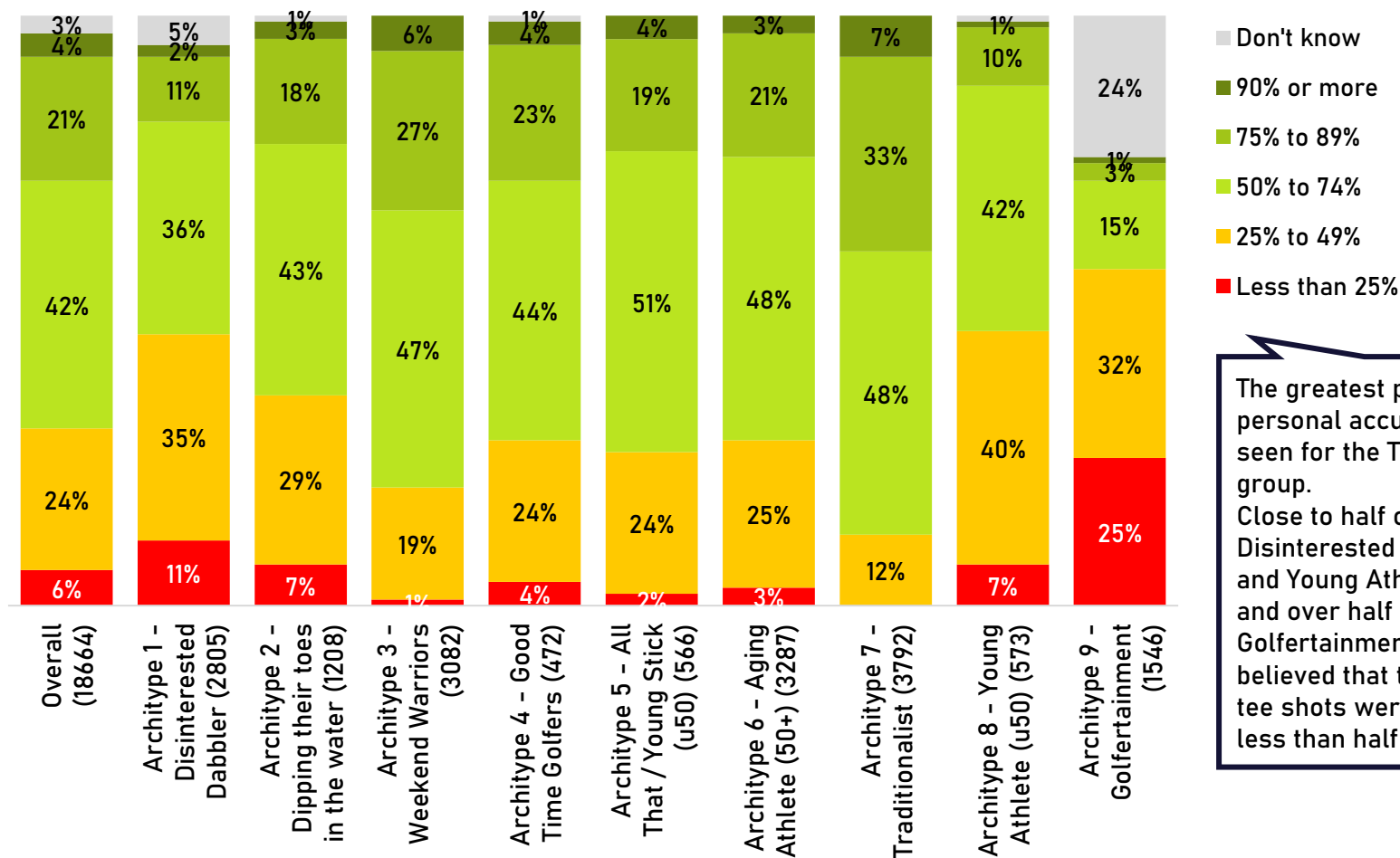
Q. How far on average do your pitching wedge (approx. 48 degree) shots travel (carry plus roll)?



Base numbers shown in brackets

DISTANCE & ACCURACY | Tee shot accuracy

Q. How accurate would you say your driver / tee shots are on average i.e. roughly how much of the time do they land in the area you wanted them to?



The greatest perception of personal accuracy was seen for the Traditionalist group. Close to half of the Disinterested Dabblers and Young Athlete groups and over half of the Golfertainment group believed that their driver / tee shots were accurate less than half of the time.

Base numbers shown in brackets

DISTANCE & ACCURACY | What's important?

Q. As you continue playing golf over the next year or two, how important is it to you that you...

■ 1 - Not at all important ■ 2 ■ 3 ■ 4 ■ 5 - Very important ■ Don't know

Maintain or minimize the loss of distance of your driver / tee shots (18402)



Actively increase the distance of your driver / tee shots (18357)



Maintain or minimize the loss of accuracy of your driver / tee shots (18357)



Actively increase the accuracy of your driver / tee shots (18318)



Generally, maintaining or minimizing loss of distance was much more important than actively increasing distance. For accuracy the difference was less pronounced, although maintaining or minimizing loss of accuracy was still slightly more important than actively increasing it.

Base numbers shown in brackets

DISTANCE & ACCURACY | What's important?

Q. As you continue playing golf over the next year or two, how important is it to you that you... MEAN SCORES

TABLE SHOWS MEAN SCORE
AVERAGES VARYING BETWEEN 1 =
"NOT AT ALL IMPORTANT" AND 5=
"VERY IMPORTANT"

	<i>Base</i>	Maintain or minimize the loss of distance of driver / tee	Actively increase the distance of driver / tee shots	Maintain or minimize the loss of accuracy of driver / tee	Actively increase the accuracy of driver / tee shots
Overall	17196	4.2	3.6	4.4	4.2
Architype 1: Disinterested Dabbler	2730	3.8	3.6	4.1	4.1
Architype 2: Dipping their toes in the water	1193	4.2	3.7	4.3	4.2
Architype 3: Weekend Warriors	3065	4.5	3.7	4.6	4.2
Architype 4: Good Time Golfers	456	4.0	3.5	4.2	4.1
Architype 5: All That / Young Stick (u50)	561	4.2	3.7	4.5	4.6
Architype 6: Aging Athlete (50+)	3269	4.4	3.7	4.5	4.3
Architype 7: Traditionalist	3768	4.6	3.7	4.6	4.2
Architype 8: Young Athlete (u50)	671	4.2	3.8	4.6	4.7
Architype 9: Golfertainment	1483	2.9	3.3	3.2	3.4

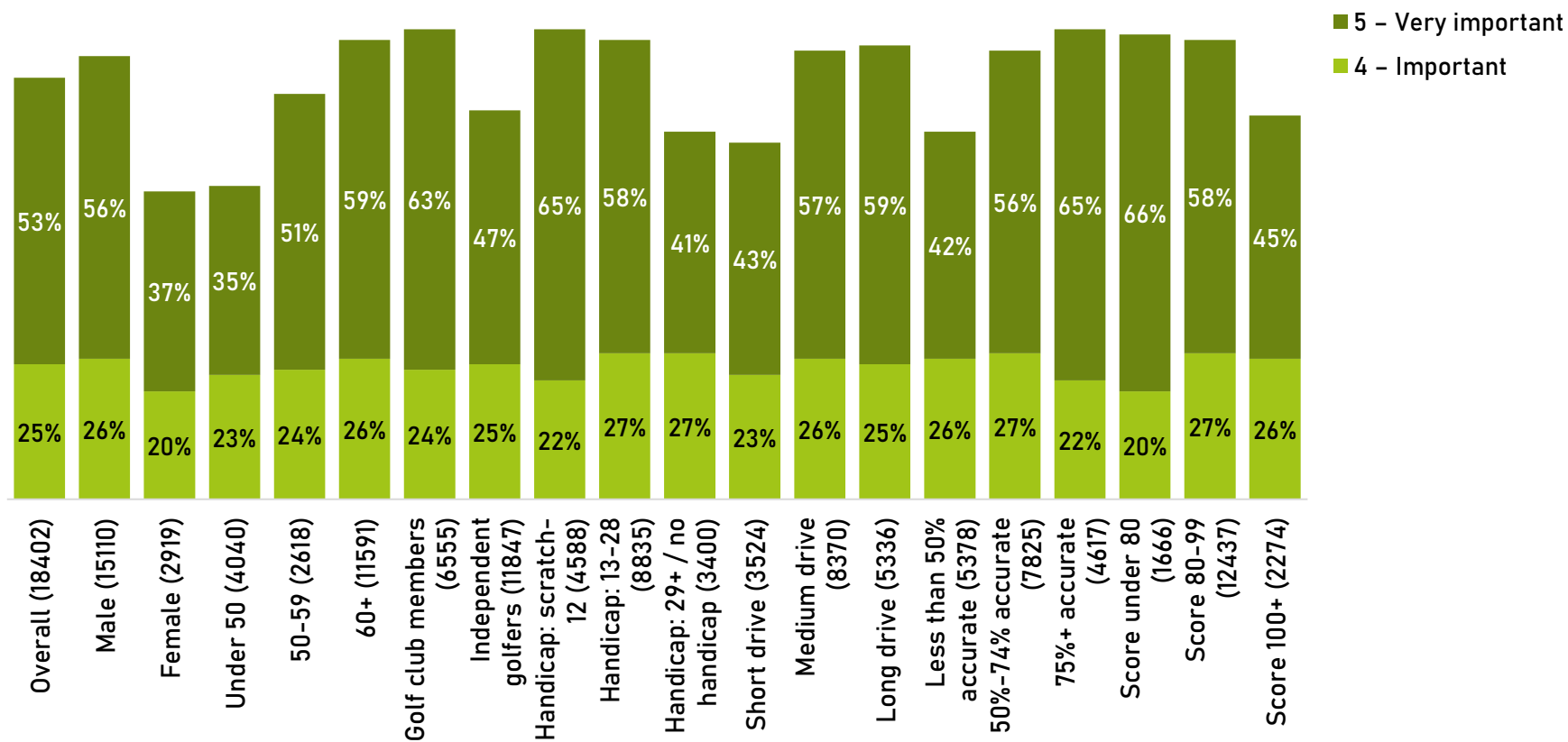
Maintaining or minimizing loss of distance was most important for the more established golfer groups – Weekend Warriors, Aging Athletes and Traditionalists. Actively increasing accuracy was most important for the younger groups – All That / Young Stick and Young Athletes.

Base numbers shown in brackets

DISTANCE & ACCURACY | Maintain / minimize loss of distance

Q. As you continue playing golf over the next year or two, how important is it to you that you... Maintain or minimize the loss of distance of your driver / tee shots?

SHOWING TOP-2-BOX ONLY

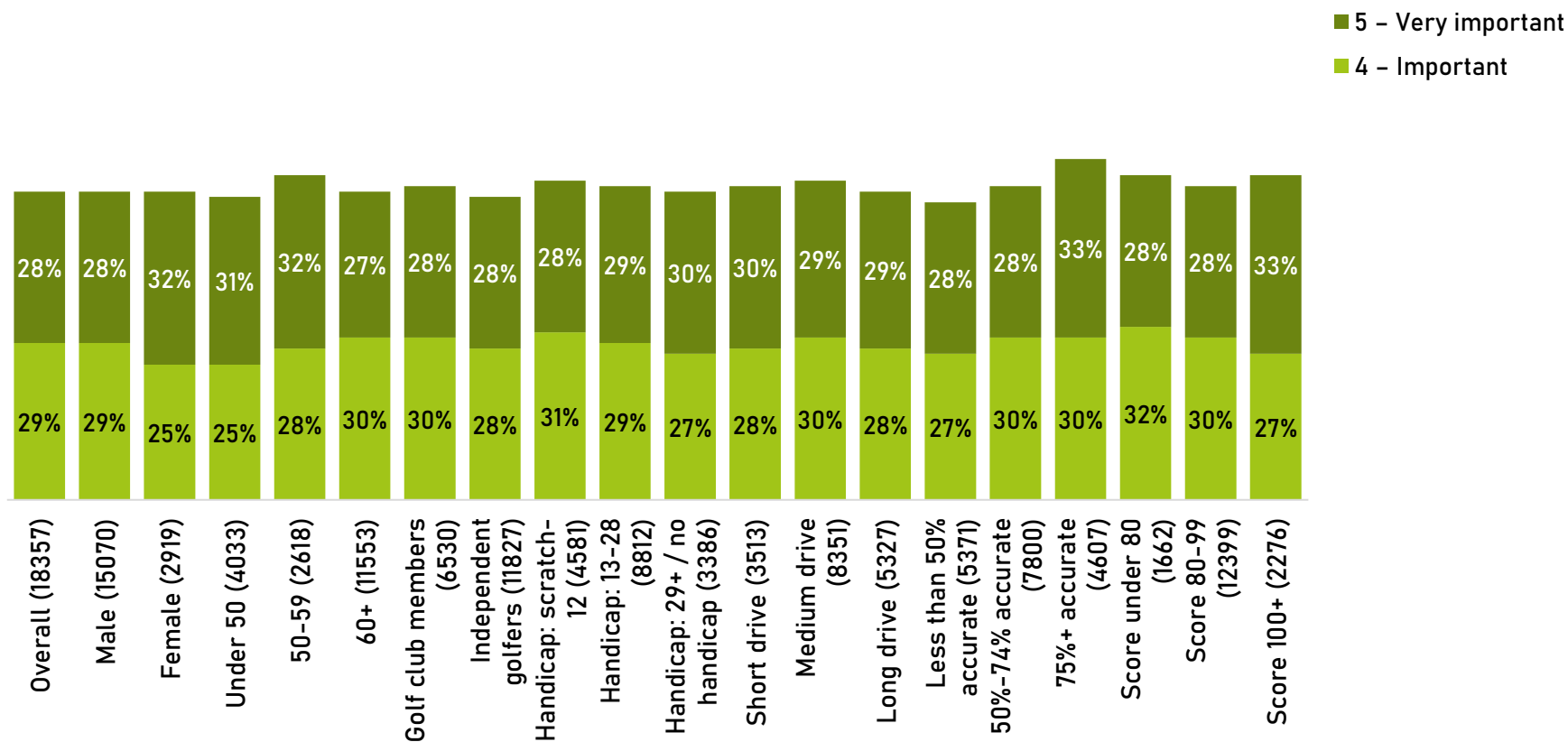


Base numbers shown in brackets

DISTANCE & ACCURACY | Actively increase distance

Q. As you continue playing golf over the next year or two, how important is it to you that you... Actively increase the distance of your driver / tee shots?

SHOWING TOP-2-BOX ONLY



Base numbers shown in brackets

DISTANCE & ACCURACY | Why is distance important?

Q. Why do you feel that it is very important to maintain, minimize loss or increase the distance of your driver / tee shots?

OPEN ENDED RESPONSE – ASKED TO ALL WHO SAID ‘VERY IMPORTANT’

KEY THEMES

- Getting shots to the green
- Club selection for the next shot
- Maximizing score
- Offsetting the impact of age on distance
- Keeping ball in play

The main reasons for wanting to maintain, minimize loss or increase distance centered around wanting to play the best golf possible, and that by avoiding loss of distance golfers would be able to play better golf.

The aging process was referenced by many, with a strong feeling that effort was needed to combat the natural effects of age.

Strong distance off the tee was also seen as beneficial to allow for more flexibility in club selection for approach shots.



DISTANCE & ACCURACY | Why is distance important?

Q. Why do you feel that it is very important to maintain, minimize loss or increase the distance of your driver / tee shots?

OPEN ENDED RESPONSE – ASKED TO ALL WHO SAID 'VERY IMPORTANT'

It's certainly easier to hit second shots to the green I prefer not to play shorter tees at least at this point

I'm 65 and don't expect to be able to increase distance much but hope to maintain as I get older.

Allows for reasonable approach shots to the green, hitting GIR is key to scoring well

If you can't get off the tee in position to make a good second shot, it's very hard to make up for it. Then it is difficult to have any chance for par so you are working to get a bogey

As this is the first shot off the tee I feel it is very important to get the distance and best location for the next shot to get the best score possible on each hole

Makes my next shot easier as I'm better with mid irons and wedges.

Suck at chipping

A mid iron shot is much easier than a long iron or fairway wood shot

I am confident with my short irons and it would be great for me to have it on my 2nd shots or approach to the green.

I need to maintain or increase driver distance to give myself a chance at par.

I'm getting older, so I want to make sure I'm not making the game any harder than it is with longer approach shots.

Distance is essential to scoring--if it takes you 3-4 shots to get to a par four you are looking at double bogey golf

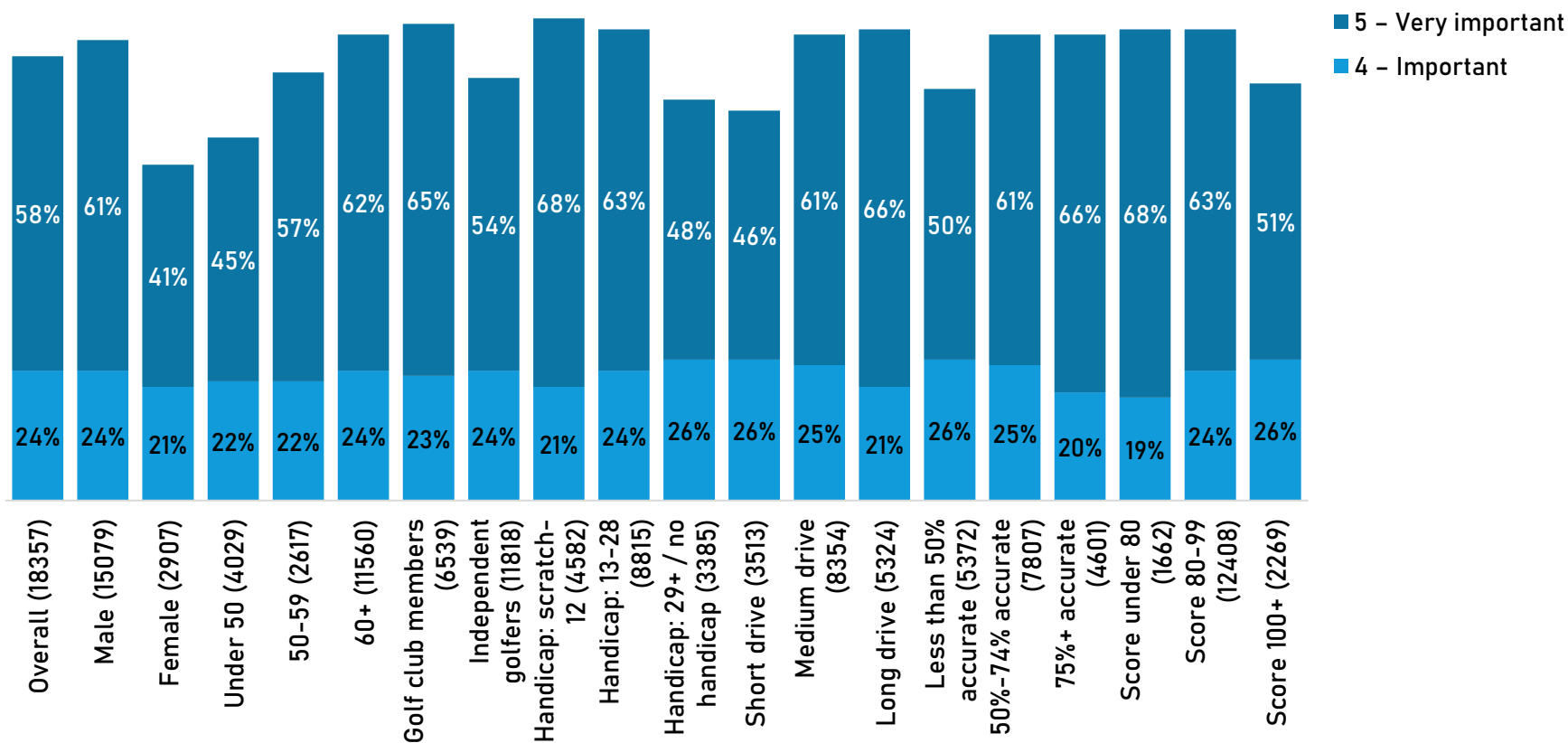
Improves my score to be long in the fairway.

I do not like the idea of losing distance with my driver thus making my second shot more difficult.

DISTANCE & ACCURACY | Maintain / minimize loss of accuracy

Q. As you continue playing golf over the next year or two, how important is it to you that you... Maintain or minimize the loss of accuracy of your driver / tee shots?

SHOWING TOP-2-BOX ONLY

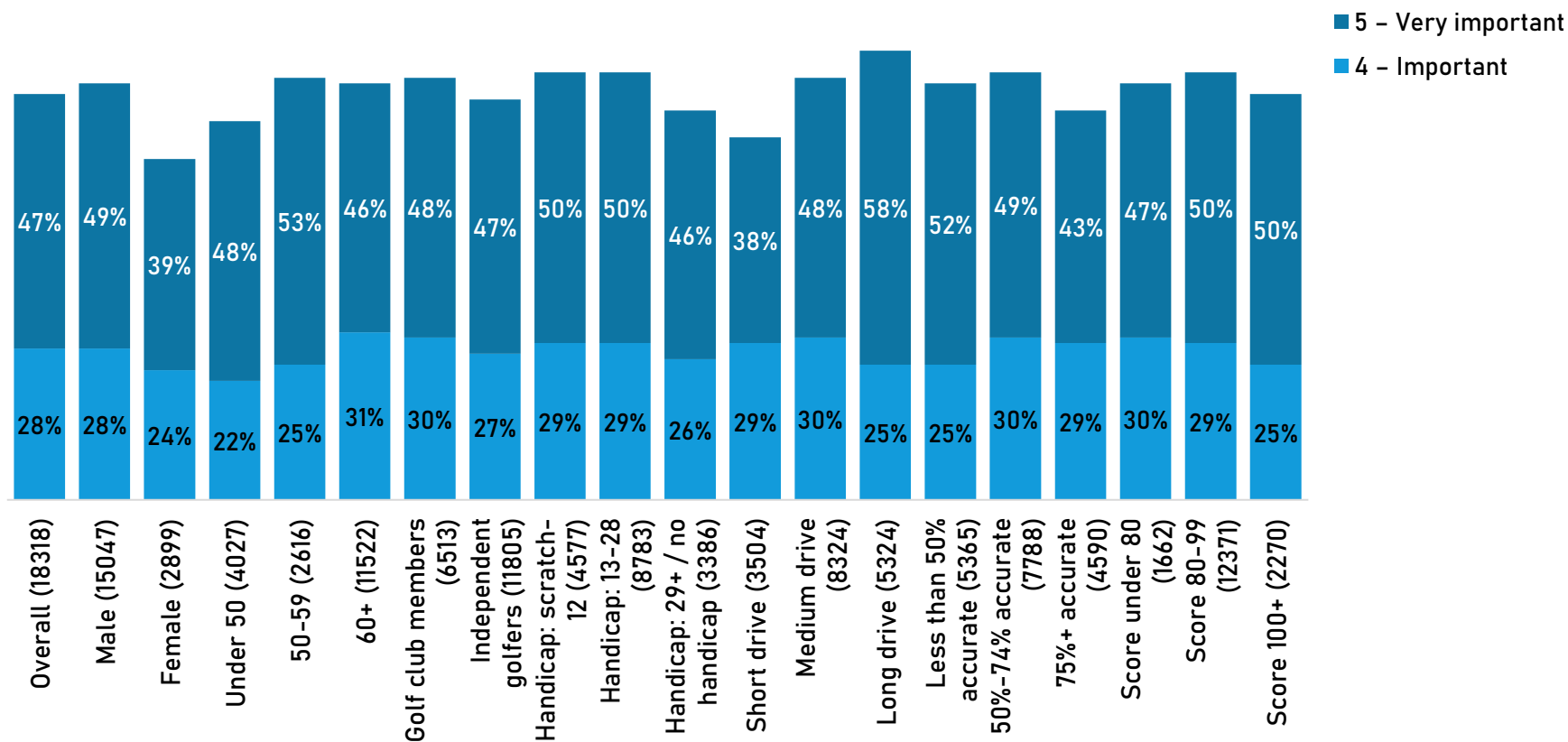


Base numbers shown in brackets

DISTANCE & ACCURACY | Actively increase accuracy

Q. As you continue playing golf over the next year or two, how important is it to you that you... Actively increase the accuracy of your driver / tee shots?

SHOWING TOP-2-BOX ONLY



Base numbers shown in brackets

DISTANCE & ACCURACY | Why is accuracy important?

Q. Why do you feel that it is very important to maintain, minimize loss or increase the accuracy of your driver / tee shots?

OPEN ENDED RESPONSE – ASKED TO ALL WHO SAID ‘VERY IMPORTANT’

KEY THEMES

- Being able to hit the fairways
- Maximizing scoring opportunities
- To stay out of trouble - rough, bunkers, water hazards
- To stay in play or hit GIR
- To have a better second shot

Reasons for wanting to maintain, minimize loss or increase accuracy were similar to those for distance, with golfers wanting to be as accurate as possible to have as successful a game as possible.



DISTANCE & ACCURACY | Why is accuracy important?

Q. Why do you feel that it is very important to maintain, minimize loss or increase the accuracy of your driver / tee shots?

OPEN ENDED RESPONSE – ASKED TO ALL WHO SAID ‘VERY IMPORTANT’

*Accuracy beats
inaccurate length*

*The tee shot is where it all begins. If
it is misdirected or where you want it
to land, that dictates how you will
have to play the hole.*

*As I lose distance,
accuracy will help me
continue to score my best.*

*Playing from the short
grass is much more fun
than not. LOL.*

*That is the shot that can set up
you mentally for the hole. If you
don't hit an accurate drive you
have to scramble to hit par or
better.*

*I don't score well when my tee
shot is not on or near the
fairway. I want to be the best
golfer in my club.*

Compete with family

*My philosophy: if you're going to
be short, you better be straight.
Normally hit 10-12 fairways per
round which is decent.*

Not fun to play in the trees!

*I want to continue to enjoy
the game and keep my
handicap down.*

Optimize my score.

*It's important because loss
of accuracy increases score
on a hole by 1+ depending on
how far off my intended
target by ball ends.*

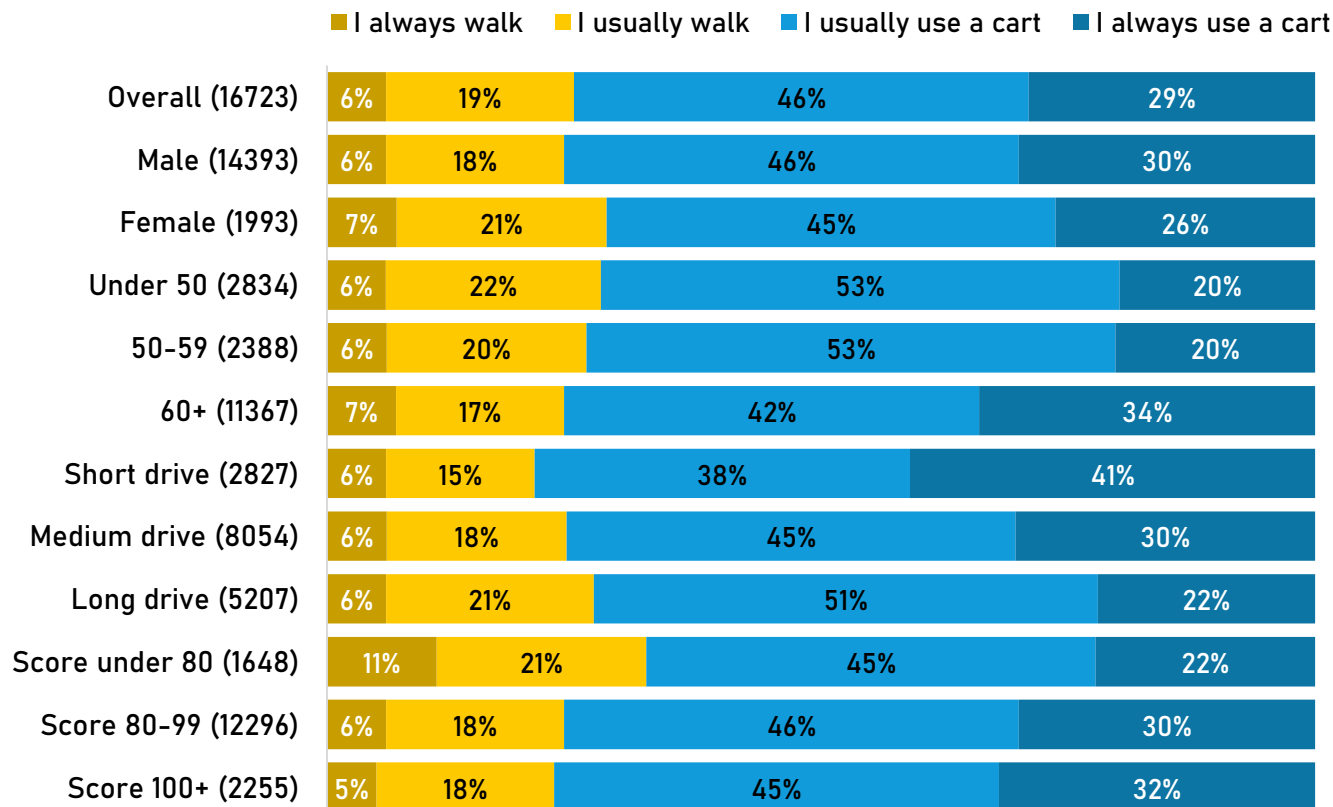
*To continue to enjoy the game, it is
very important to keep your skill
levels. Otherwise, the game
becomes frustrating and not fun to
play. That is why I have moved
forward on the tee boxes as I have
aged, and when playing with
groups, have used a Captains
Choice format for drives only. This
keeps the game fun and much more
enjoyable.*

ON-COURSE EXPERIENCE



ON-COURSE EXPERIENCE | Navigating the course

Q. Do you typically navigate the course on foot or with a cart?

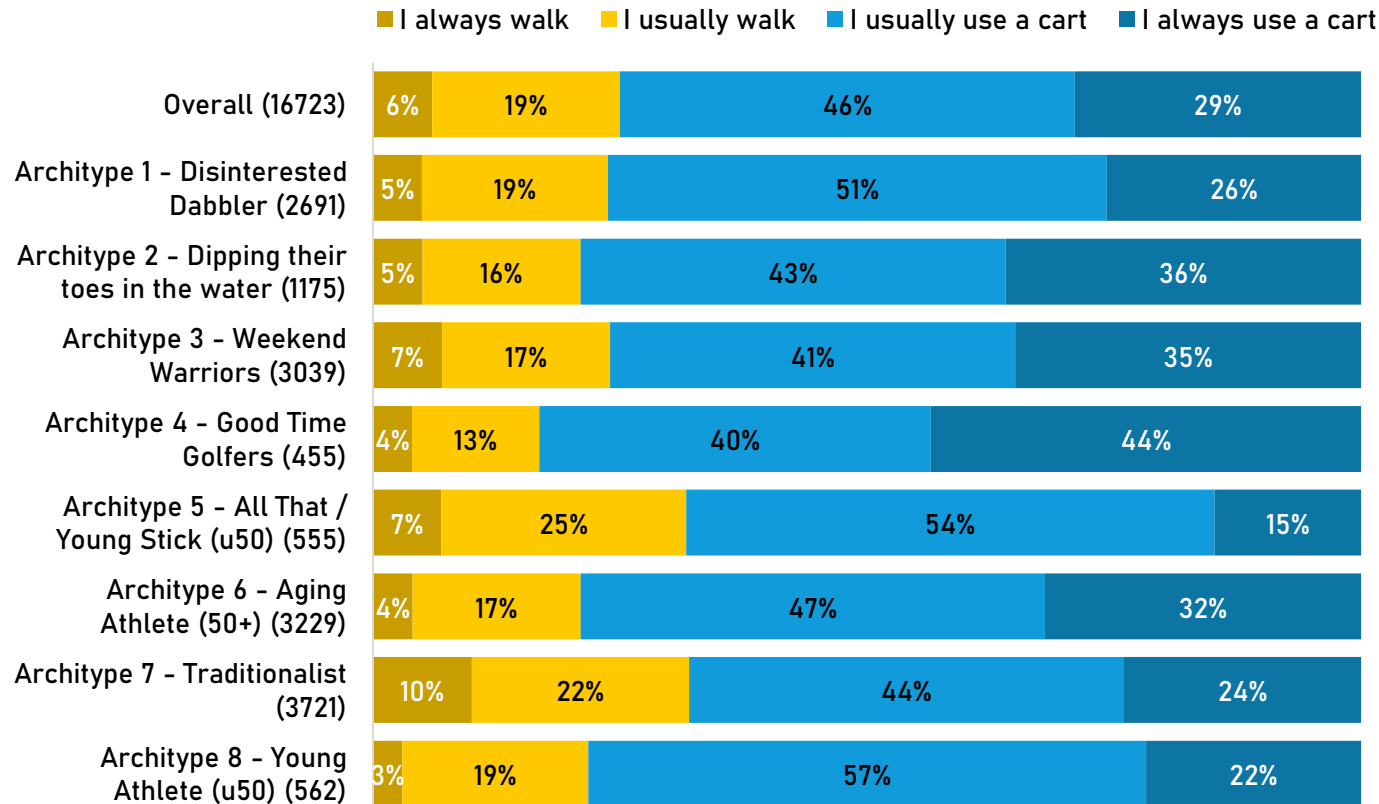


In general, golfers preferred to use a cart to navigate the course. Older golfers were more likely to use a cart, as were those with a shorter drive, while low scorers (<80) were more likely to prefer to navigate the course on foot.

Base numbers shown in brackets

ON-COURSE EXPERIENCE | Navigating the course – by archetype

Q. Do you typically navigate the course on foot or with a cart?



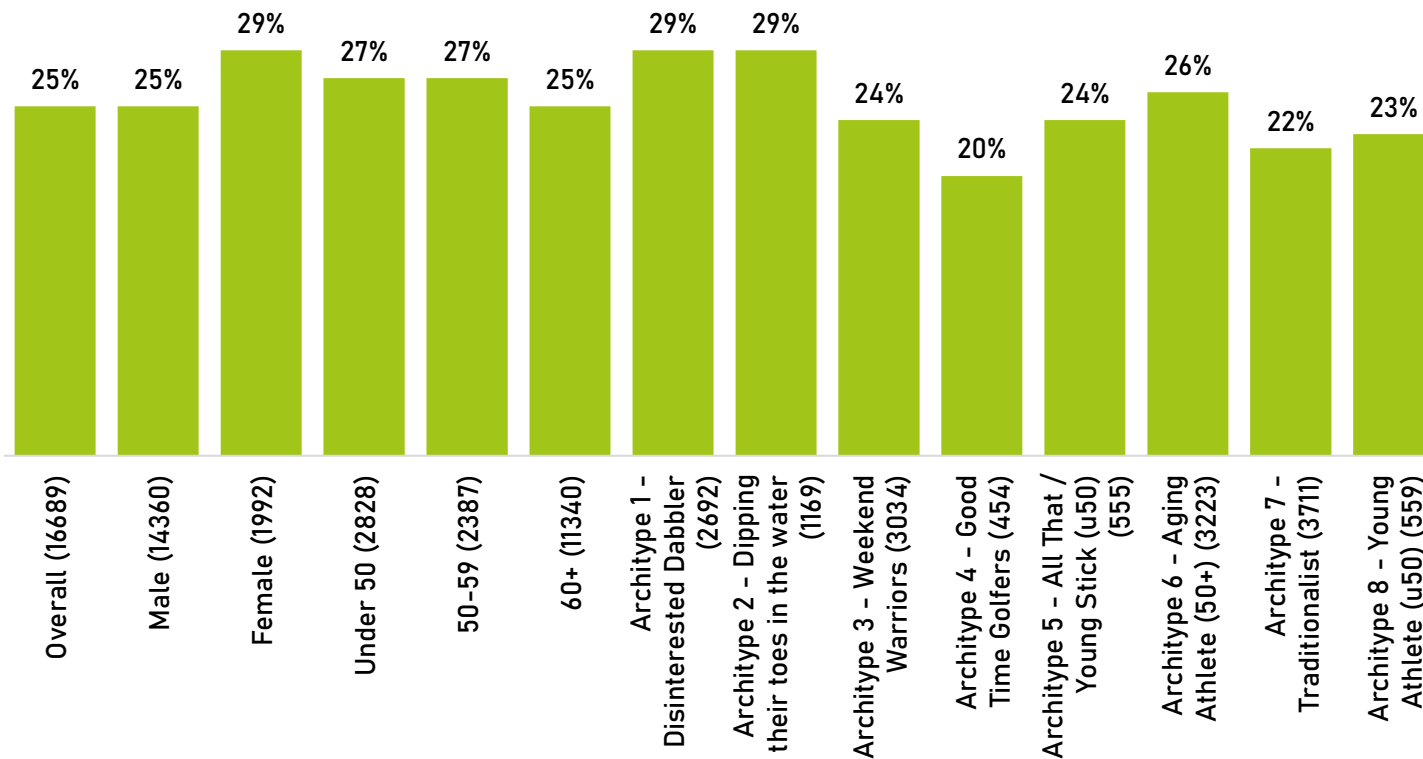
Those in the All That / Young Stick and Traditionalist groups were most likely to say that they always or usually navigate the course on foot. Just 15% of All That / Young Stick golfers said they always use a cart.

Base numbers shown in brackets

ON-COURSE EXPERIENCE | Course selection

Q. Would you specifically choose a shorter or better designed course to make it easier to walk during your round?

SHOWING 'YES' RESPONSES ONLY



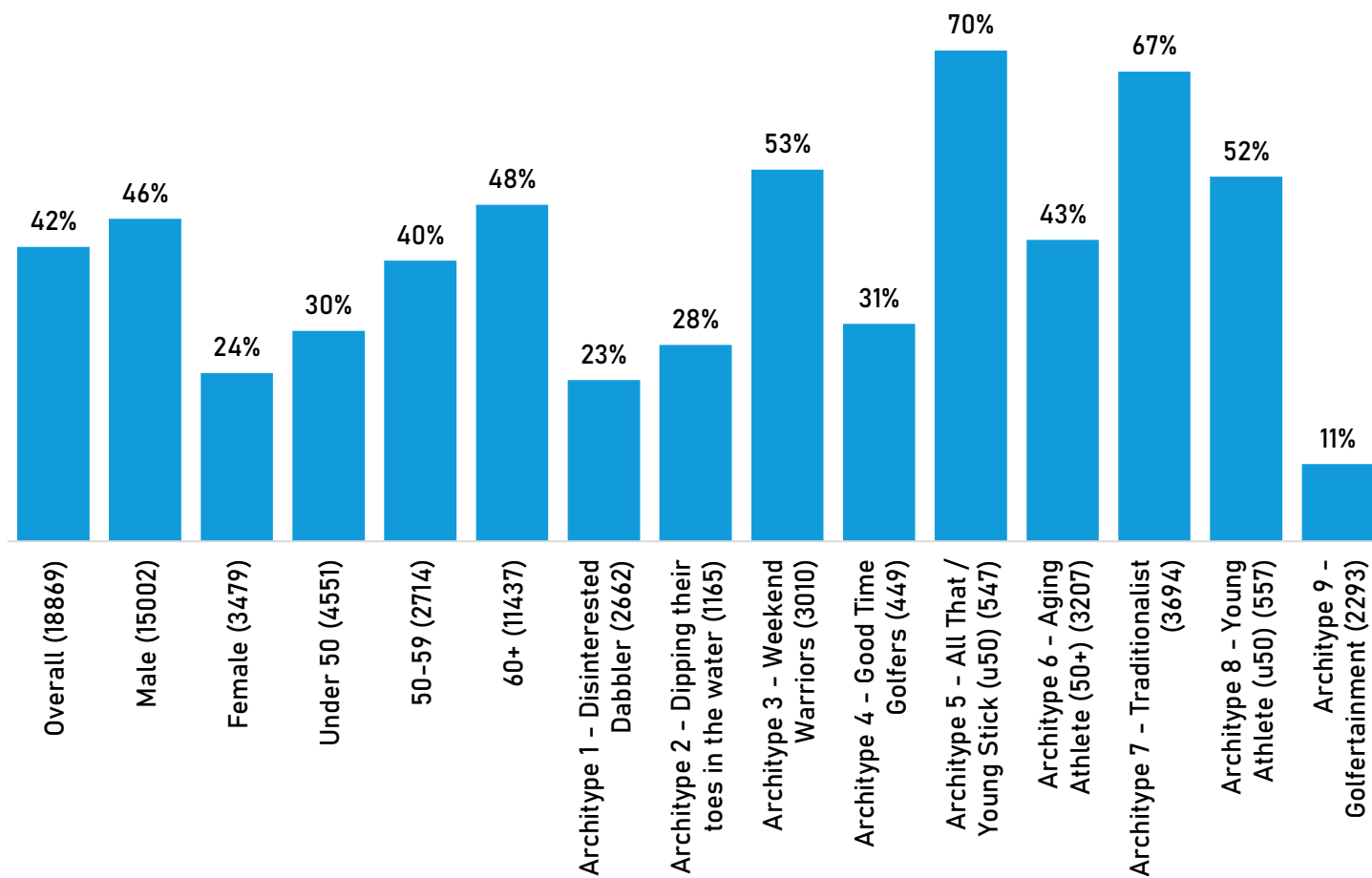
As the group who were also most likely to always use a cart, Good Time Golfers' choice of course would be least affected by that course's potential to be navigated by foot. Female golfers, the Disinterested Dabblers and Dipping their toes in the water groups were most likely to say that they would choose a shorter or better designed course to make it easier to walk.

Base numbers shown in brackets

ON-COURSE EXPERIENCE | Performance data

Q. Have you ever collected performance data about your game, like swing speed, or measured carry distance with certain clubs?

SHOWING 'YES' RESPONSES ONLY



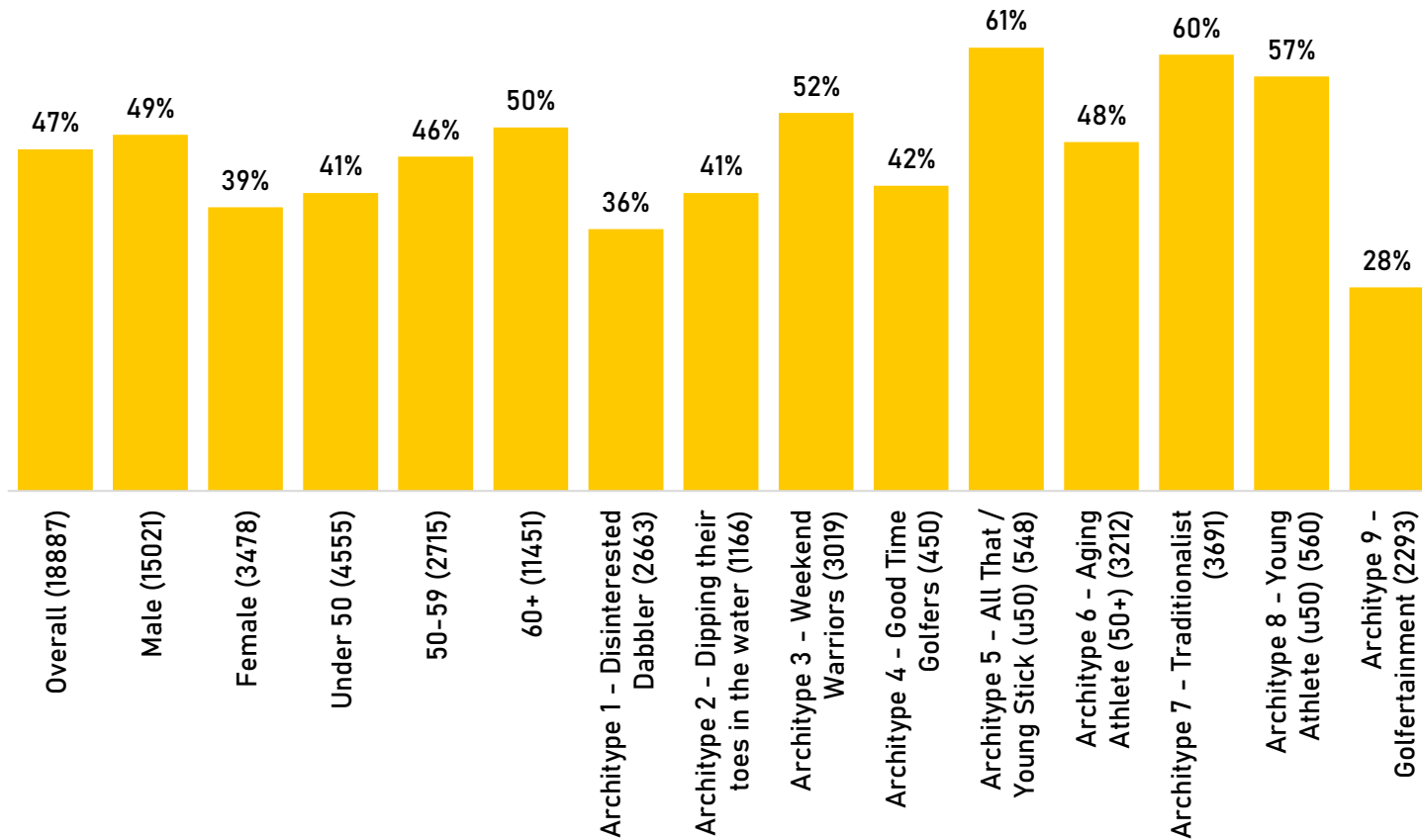
Just under half of golfers overall had previously collected performance data about their game. This was highest amongst golfers from the All that / Young Stick and Traditionalist architype groups

Base numbers shown in brackets

ON-COURSE EXPERIENCE | Access to performance technology

Q. Can you easily access technology that allows you to measure your swing speed and other performance data - either at a golf facility, simulator, or golf store?

SHOWING 'YES' RESPONSES ONLY

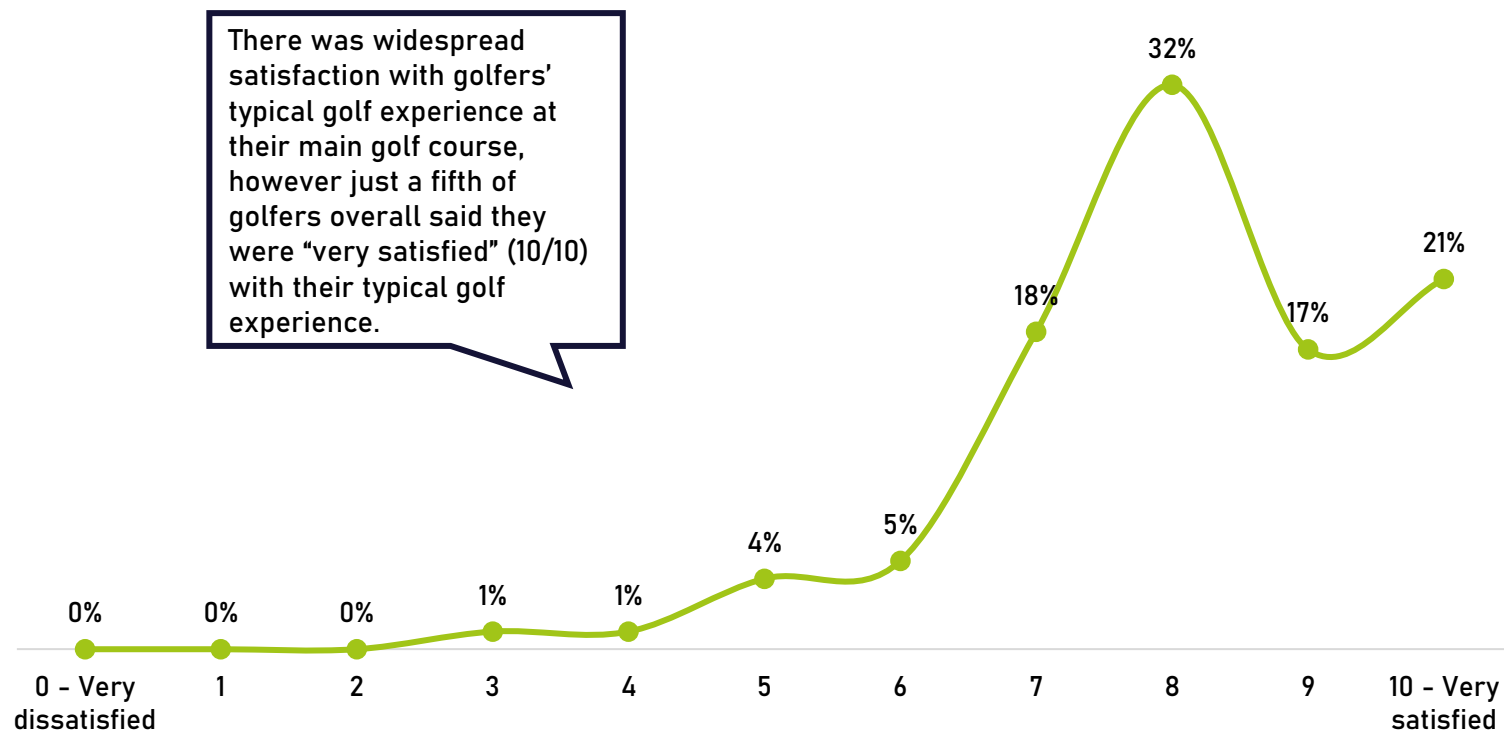


Those who were generally less engaged with golf were less likely to agree that they had access to performance technology.

Base numbers shown in brackets

ON-COURSE EXPERIENCE | Course satisfaction

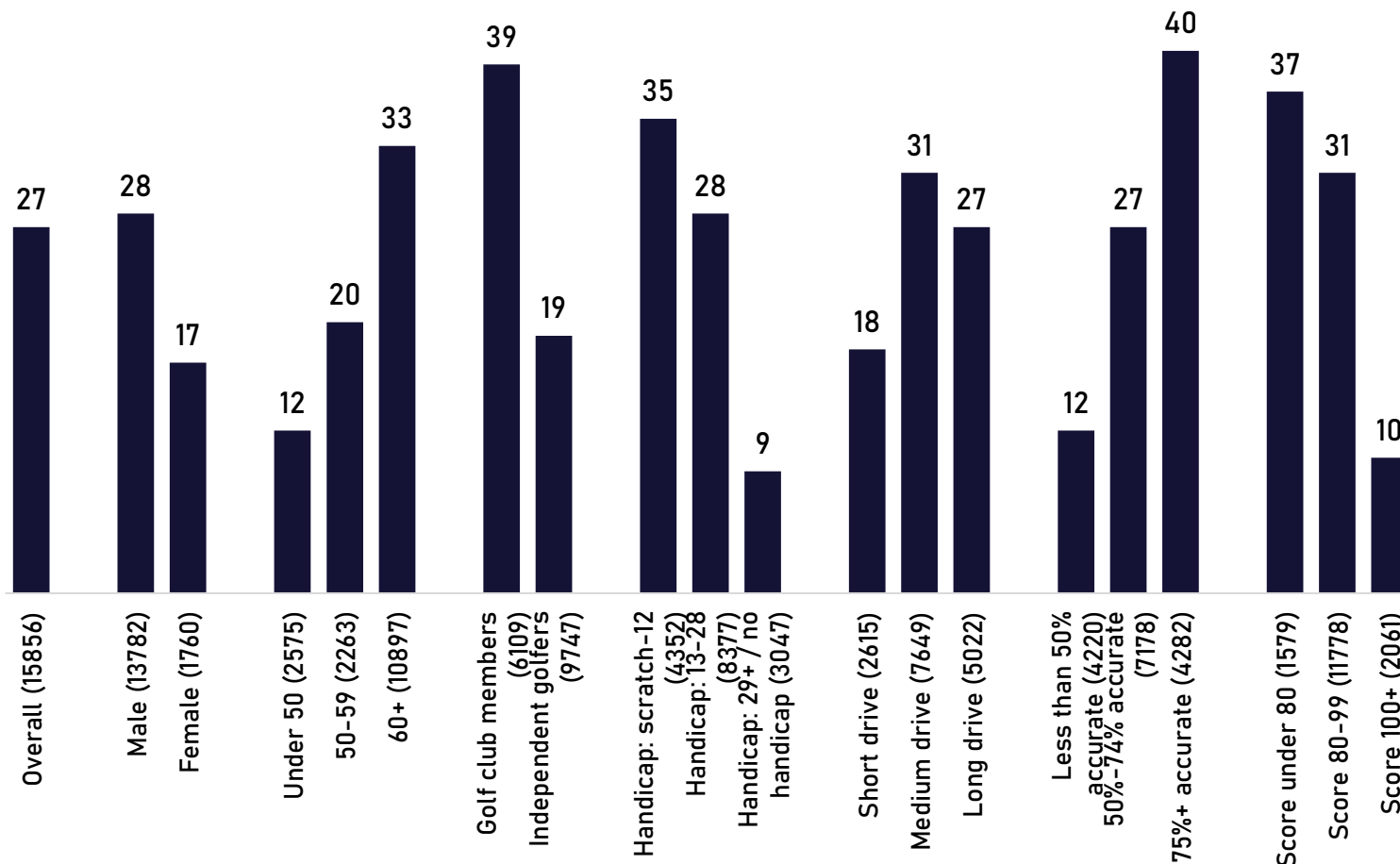
Q. Thinking about the golf course that you play most often, how satisfied are you with your typical golf experience? Please use a scale where 0 = 'very dissatisfied' and 10 = 'very satisfied'



Base: 15856

ON-COURSE EXPERIENCE | Course net satisfaction score*

Q. Thinking about the golf course that you play most often, how satisfied are you with your typical golf experience? Please use a scale where 0 = 'very dissatisfied' and 10 = 'very satisfied'



Better golfers and club members were generally more satisfied with their golf experience at their main course. Female golfers and younger golfers were generally less satisfied.

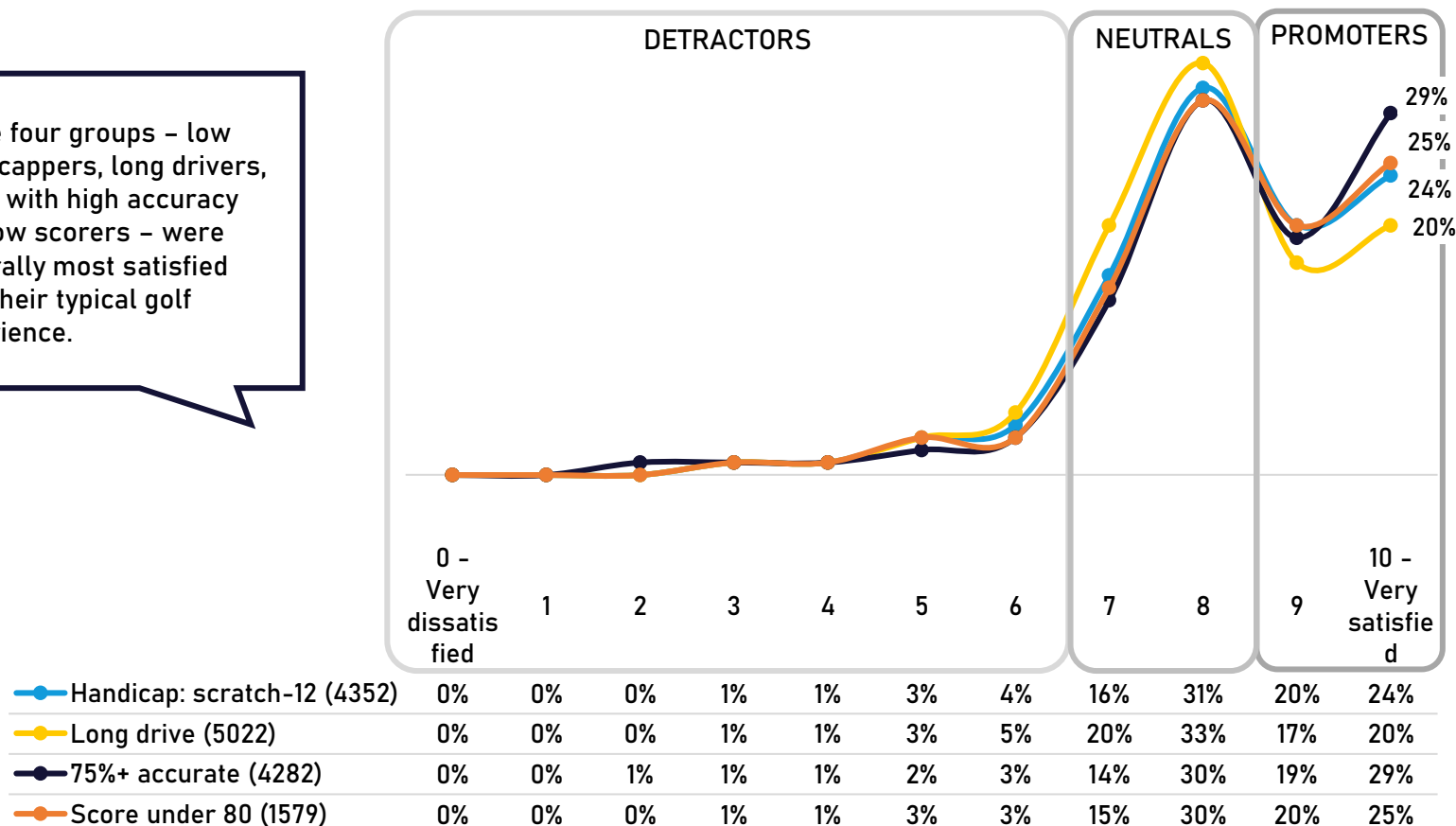
* The net satisfaction score reflects the 'net promoter score' which is commonly used to assess recommendation. The score is calculated by subtracting the sum of 0-6 ratings (dissatisfied) from the sum of 9-10 ratings (satisfied). Scores of 7-8 are considered neutral and are not included.

Base: 15856

ON-COURSE EXPERIENCE | The most satisfied groups

Q. Thinking about the golf course that you play most often, how satisfied are you with your typical golf experience? Please use a scale where 0 = 'very dissatisfied' and 10 = 'very satisfied'

These four groups – low handicappers, long drivers, those with high accuracy and low scorers – were generally most satisfied with their typical golf experience.



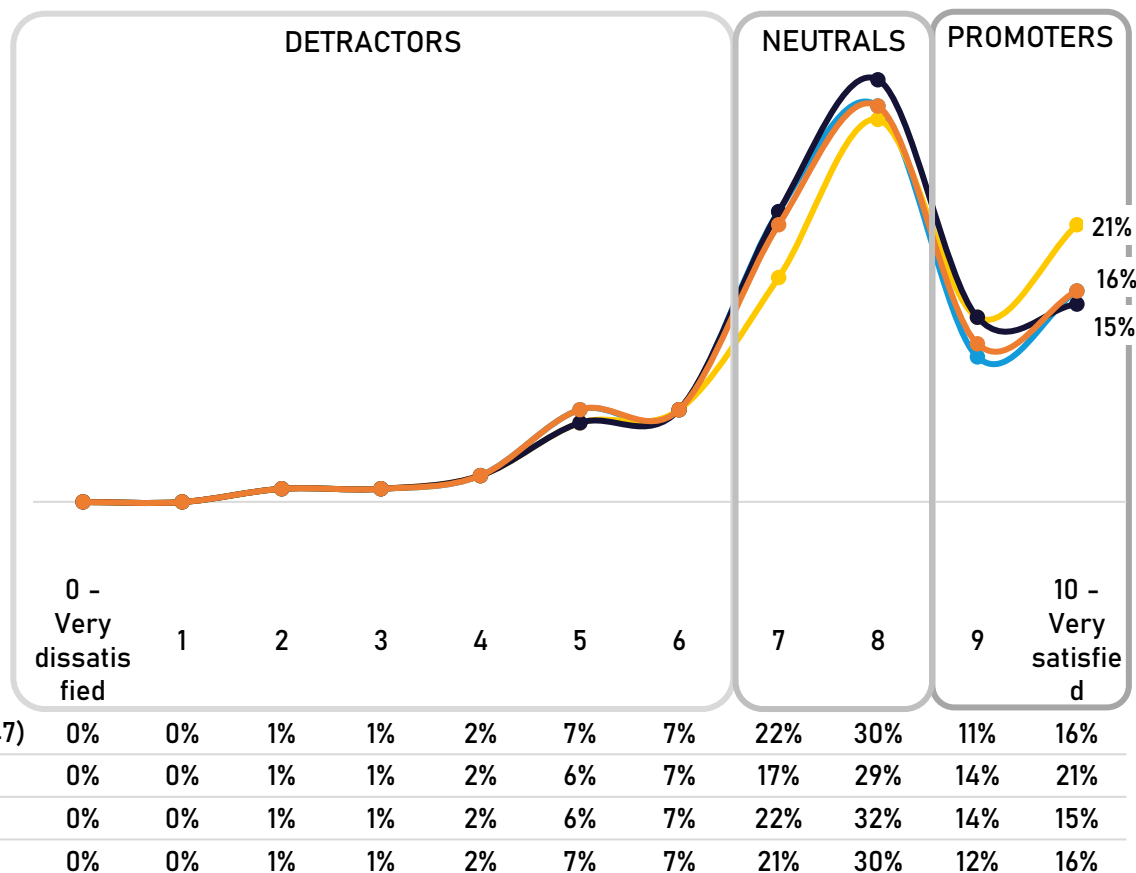
Base numbers shown in brackets

ON-COURSE EXPERIENCE | The least satisfied groups

Q. Thinking about the golf course that you play most often, how satisfied are you with your typical golf experience? Please use a scale where 0 = 'very dissatisfied' and 10 = 'very satisfied'

These four groups – high / no handicappers, short drivers, those with low accuracy and high scorers – were generally least satisfied with their typical golf experience.

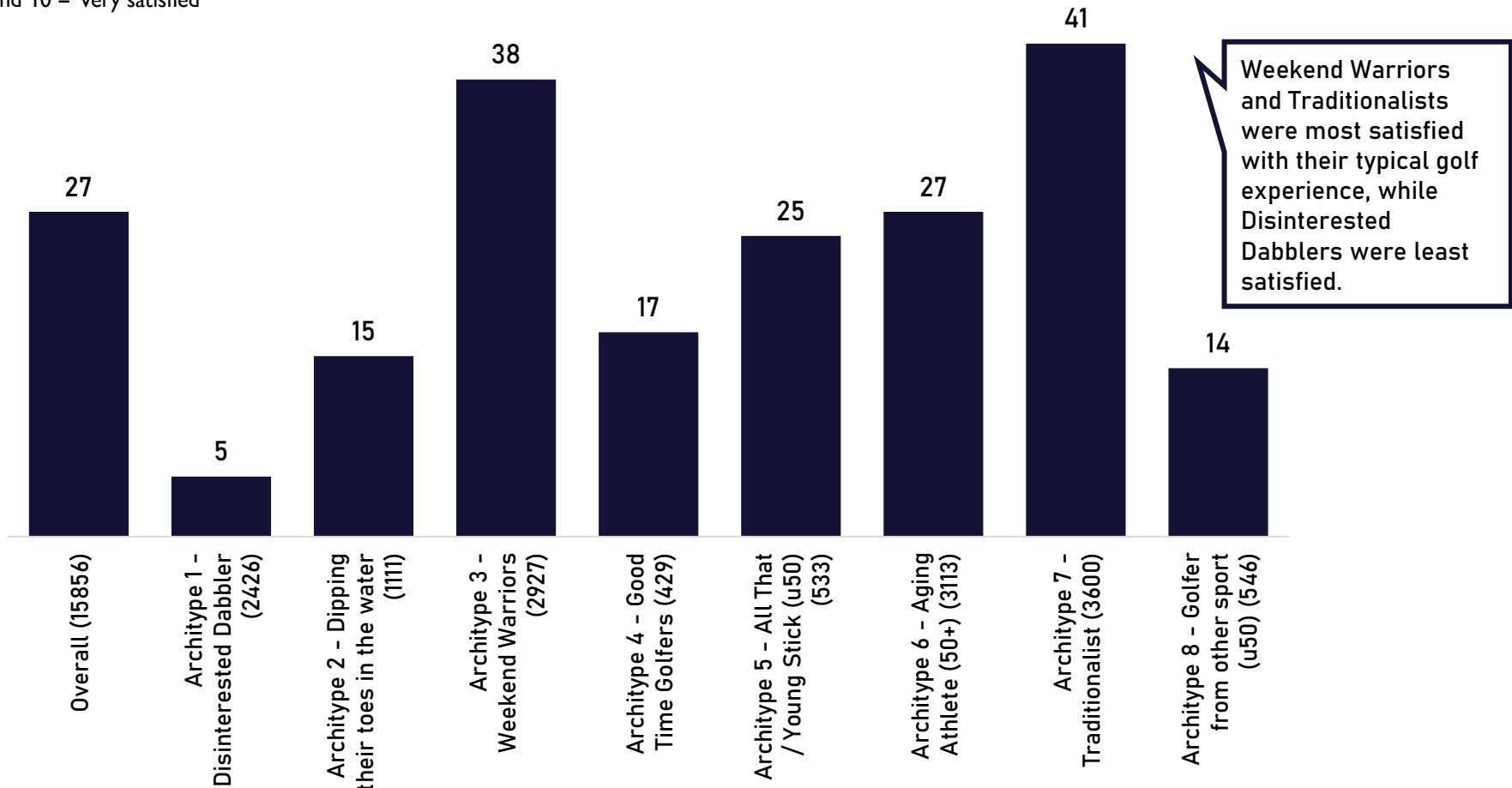
The least satisfied groups were more likely to be neutral (rating 7 or 8) or middling in their opinion (rating 5 or 6) than the most satisfied groups.



Base numbers shown in brackets

ON-COURSE EXPERIENCE | Course net satisfaction score*

Q. Thinking about the golf course that you play most often, how satisfied are you with your typical golf experience? Please use a scale where 0 = 'very dissatisfied' and 10 = 'very satisfied'

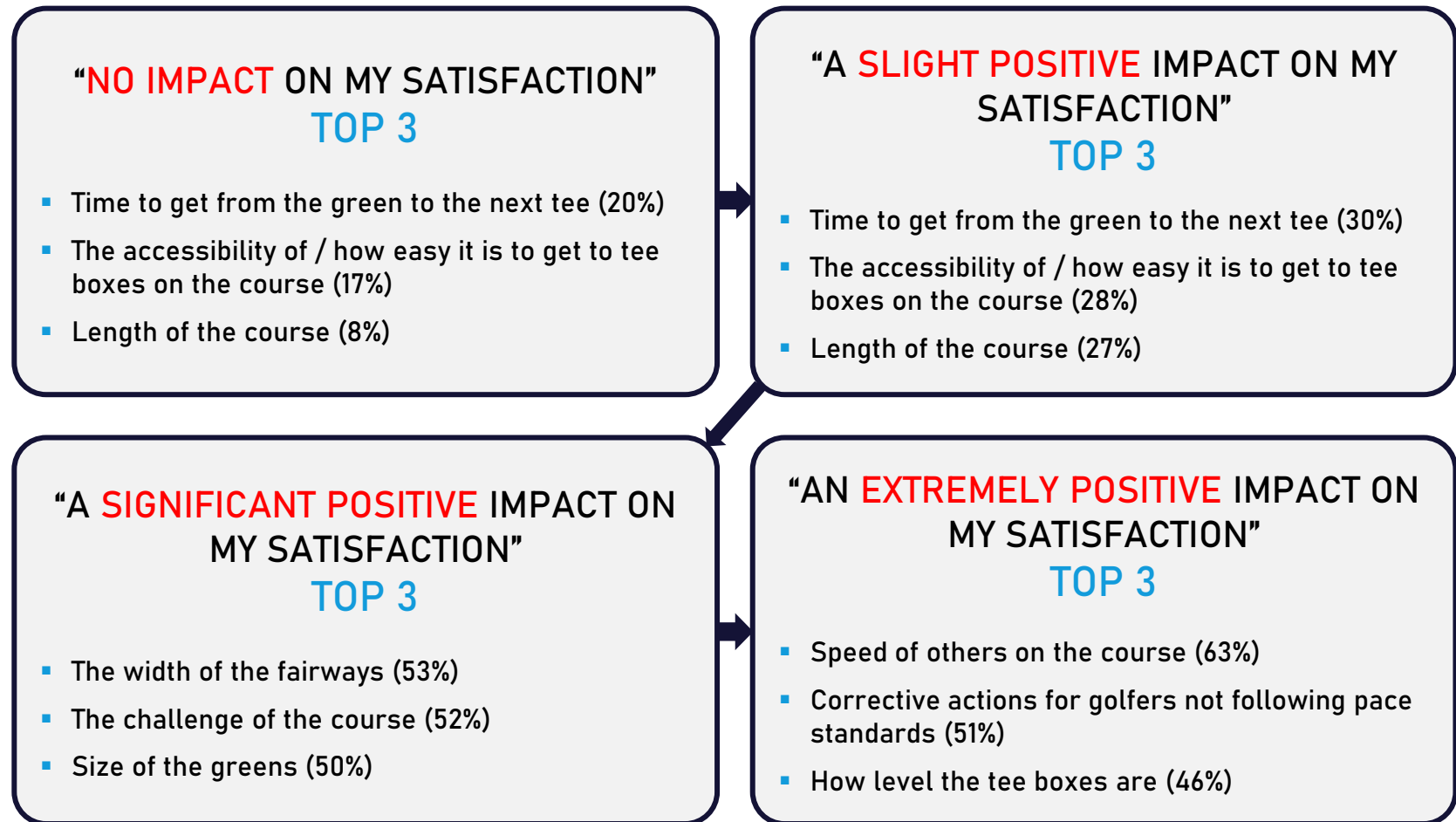


* The net satisfaction score reflects the 'net promoter score' which is commonly used to assess recommendation. The score is calculated by subtracting the sum of 0-6 ratings (dissatisfied) from the sum of 9-10 ratings (satisfied). Scores of 7-8 are considered neutral and are not included.

Base numbers shown in brackets

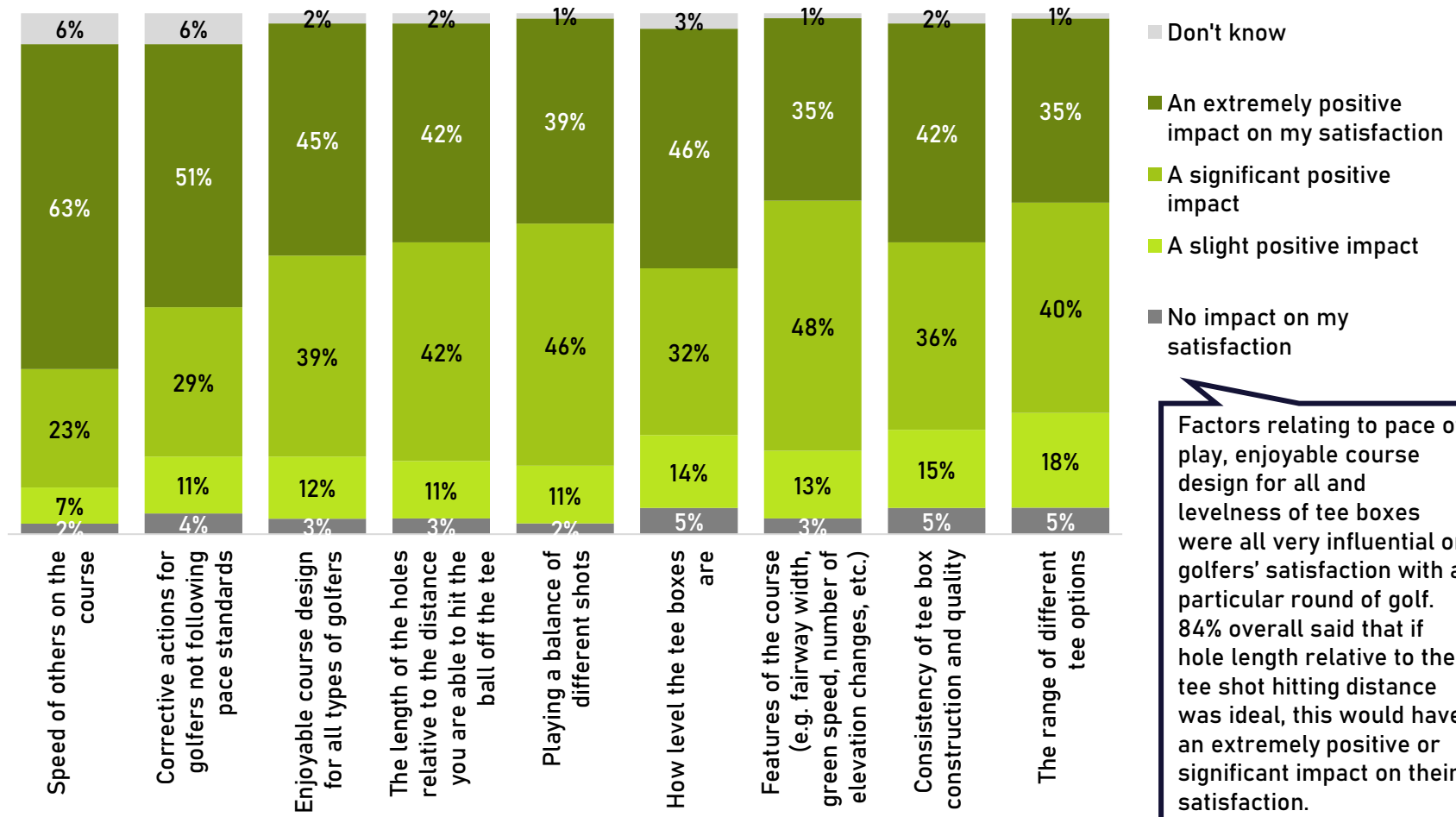
ON-COURSE EXPERIENCE | Key factors – Touchpoint Top 3s

Q. We're about to show you a series of factors, which may or may not have an impact on how enjoyable you and the people you play with find the experience of golf on a golf course. Please imagine that each one of these factors is "ideal" for you for a particular round. How much would each factor being ideal actually impact on your satisfaction with playing that round?



ON-COURSE EXPERIENCE | Overall impact of touchpoints (i)

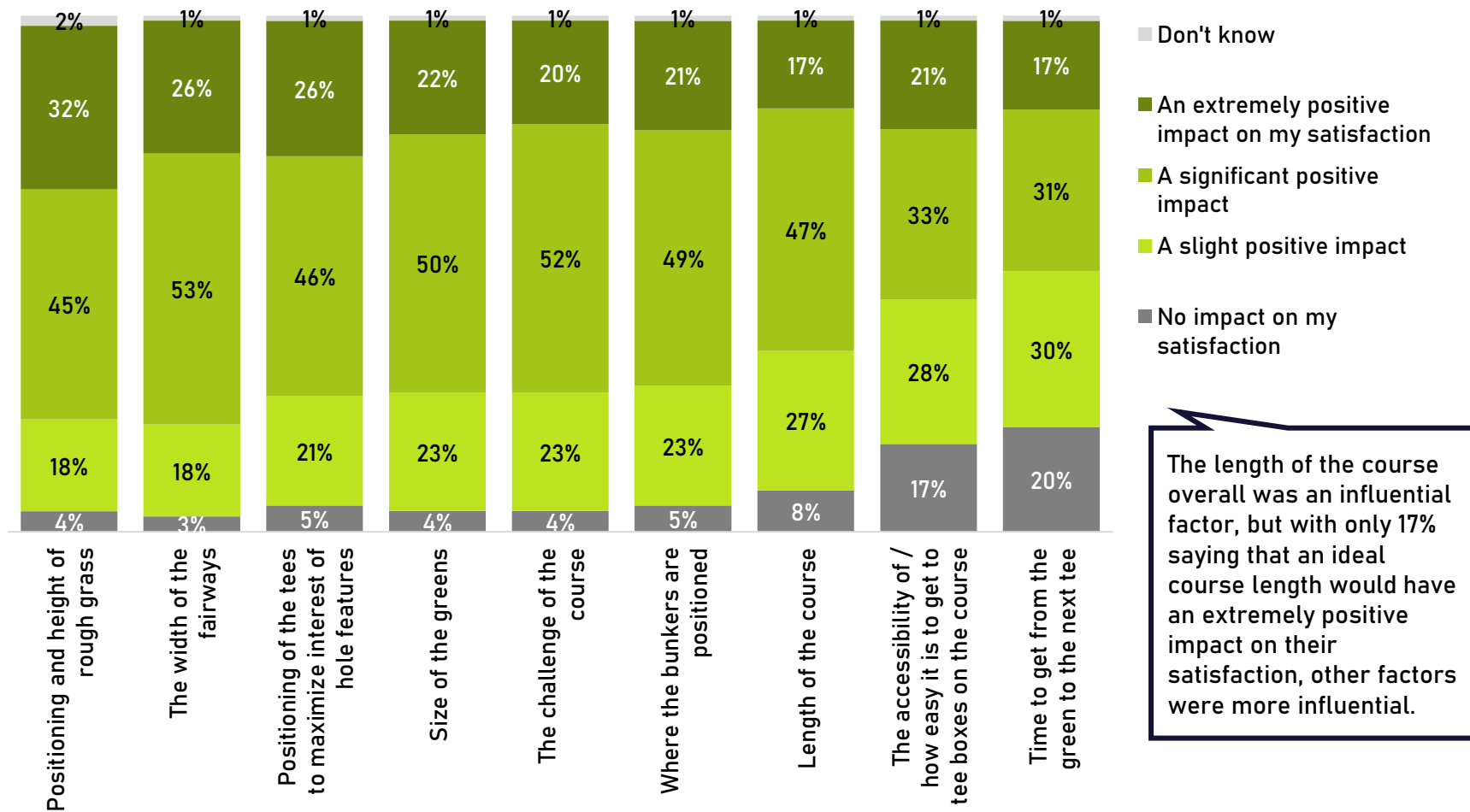
Q. We're about to show you a series of factors, which may or may not have an impact on how enjoyable you and the people you play with find the experience of golf on a golf course. Please imagine that each one of these factors is "ideal" for you for a particular round. How much would each factor being ideal actually impact on your satisfaction with playing that round?



Base numbers shown in brackets

ON-COURSE EXPERIENCE | Overall impact of touchpoints (ii)

Q. We're about to show you a series of factors, which may or may not have an impact on how enjoyable you and the people you play with find the experience of golf on a golf course. Please imagine that each one of these factors is "ideal" for you for a particular round. How much would each factor being ideal actually impact on your satisfaction with playing that round?



Base numbers shown in brackets

ON-COURSE EXPERIENCE | Key touchpoints by archetype (i)

Q. We're about to show you a series of factors, which may or may not have an impact on how enjoyable you and the people you play with find the experience of golf on a golf course. Please imagine that each one of these factors is "ideal" for you for a particular round. How much would each factor being ideal actually impact on your satisfaction with playing that round?

ARCHETYPE 1: DISINTERESTED DABBLER

"NO IMPACT ON MY SATISFACTION" TOP 3

- Time to get from the green to the next tee (20%)
- The accessibility of / how easy it is to get to tee boxes on the course (17%)
- Length of the course (14%)

"AN EXTREMELY POSITIVE IMPACT ON MY SATISFACTION" TOP 3

- Speed of others on the course (48%)
- Enjoyable course design for all types of golfers (45%)
- Corrective actions for golfers not following pace standards (35%)

ARCHETYPE 2: DIPPING THEIR TOES IN THE WATER

"NO IMPACT ON MY SATISFACTION" TOP 3

- Time to get from the green to the next tee (22%)
- The accessibility of / how easy it is to get to tee boxes on the course (17%)
- Length of the course (12%)

"AN EXTREMELY POSITIVE IMPACT ON MY SATISFACTION" TOP 3

- Speed of others on the course (55%)
- Enjoyable course design for all types of golfers (44%)
- The length of the holes relative to the distance you are able to hit the ball off the tee (39%)

ON-COURSE EXPERIENCE | Key touchpoints by archetype (ii)

Q. We're about to show you a series of factors, which may or may not have an impact on how enjoyable you and the people you play with find the experience of golf on a golf course. Please imagine that each one of these factors is "ideal" for you for a particular round. How much would each factor being ideal actually impact on your satisfaction with playing that round?

ARCHETYPE 3: WEEKEND WARRIORS

"NO IMPACT ON MY SATISFACTION" TOP 3

- Time to get from the green to the next tee (21%)
- The accessibility of / how easy it is to get to tee boxes on the course (17%)
- Length of the course (8%)

"AN EXTREMELY POSITIVE IMPACT ON MY SATISFACTION" TOP 3

- Speed of others on the course (69%)
- Corrective actions for golfers not following pace standards (58%)
- How level the tee boxes are (51%)

ARCHETYPE 4: GOOD TIME GOLFERS

"NO IMPACT ON MY SATISFACTION" TOP 3

- Time to get from the green to the next tee (19%)
- The accessibility of / how easy it is to get to tee boxes on the course (14%)
- Length of the course (13%)

"AN EXTREMELY POSITIVE IMPACT ON MY SATISFACTION" TOP 3

- Speed of others on the course (53%)
- Corrective actions for golfers not following pace standards (47%)
- How level the tee boxes are (45%)

ON-COURSE EXPERIENCE | Key touchpoints by archetype (iii)

Q. We're about to show you a series of factors, which may or may not have an impact on how enjoyable you and the people you play with find the experience of golf on a golf course. Please imagine that each one of these factors is "ideal" for you for a particular round. How much would each factor being ideal actually impact on your satisfaction with playing that round?

ARCHETYPE 5: ALL THAT / YOUNG STICK (u50)

"NO IMPACT ON MY SATISFACTION" TOP 3

- Time to get from the green to the next tee (27%)
- The accessibility of / how easy it is to get to tee boxes on the course (24%)
- The range of different tee options (9%)

"AN EXTREMELY POSITIVE IMPACT ON MY SATISFACTION" TOP 3

- Speed of others on the course (67%)
- How level the tee boxes are (57%)
- Corrective actions for golfers not following pace standards (55%)

ARCHETYPE 6: AGING ATHLETE (50+)

"NO IMPACT ON MY SATISFACTION" TOP 3

- Time to get from the green to the next tee (21%)
- The accessibility of / how easy it is to get to tee boxes on the course (15%)
- Length of the course (7%)

"AN EXTREMELY POSITIVE IMPACT ON MY SATISFACTION" TOP 3

- Speed of others on the course (65%)
- Corrective actions for golfers not following pace standards (52%)
- Enjoyable course design for all types of golfers (49%)

ON-COURSE EXPERIENCE | Key touchpoints by archetype (iv)

Q. We're about to show you a series of factors, which may or may not have an impact on how enjoyable you and the people you play with find the experience of golf on a golf course. Please imagine that each one of these factors is "ideal" for you for a particular round. How much would each factor being ideal actually impact on your satisfaction with playing that round?

ARCHETYPE 5: TRADITIONALIST

"NO IMPACT ON MY SATISFACTION" TOP 3

- Time to get from the green to the next tee (18%)
- The accessibility of / how easy it is to get to tee boxes on the course (17%)
- Length of the course (6%)

"AN EXTREMELY POSITIVE IMPACT ON MY SATISFACTION" TOP 3

- Speed of others on the course (71%)
- Corrective actions for golfers not following pace standards (61%)
- How level the tee boxes are (53%)

ARCHETYPE 6: YOUNG ATHLETE (u50)

"NO IMPACT ON MY SATISFACTION" TOP 3

- The accessibility of / how easy it is to get to tee boxes on the course (25%)
- Time to get from the green to the next tee (25%)
- The range of different tee options (8%)

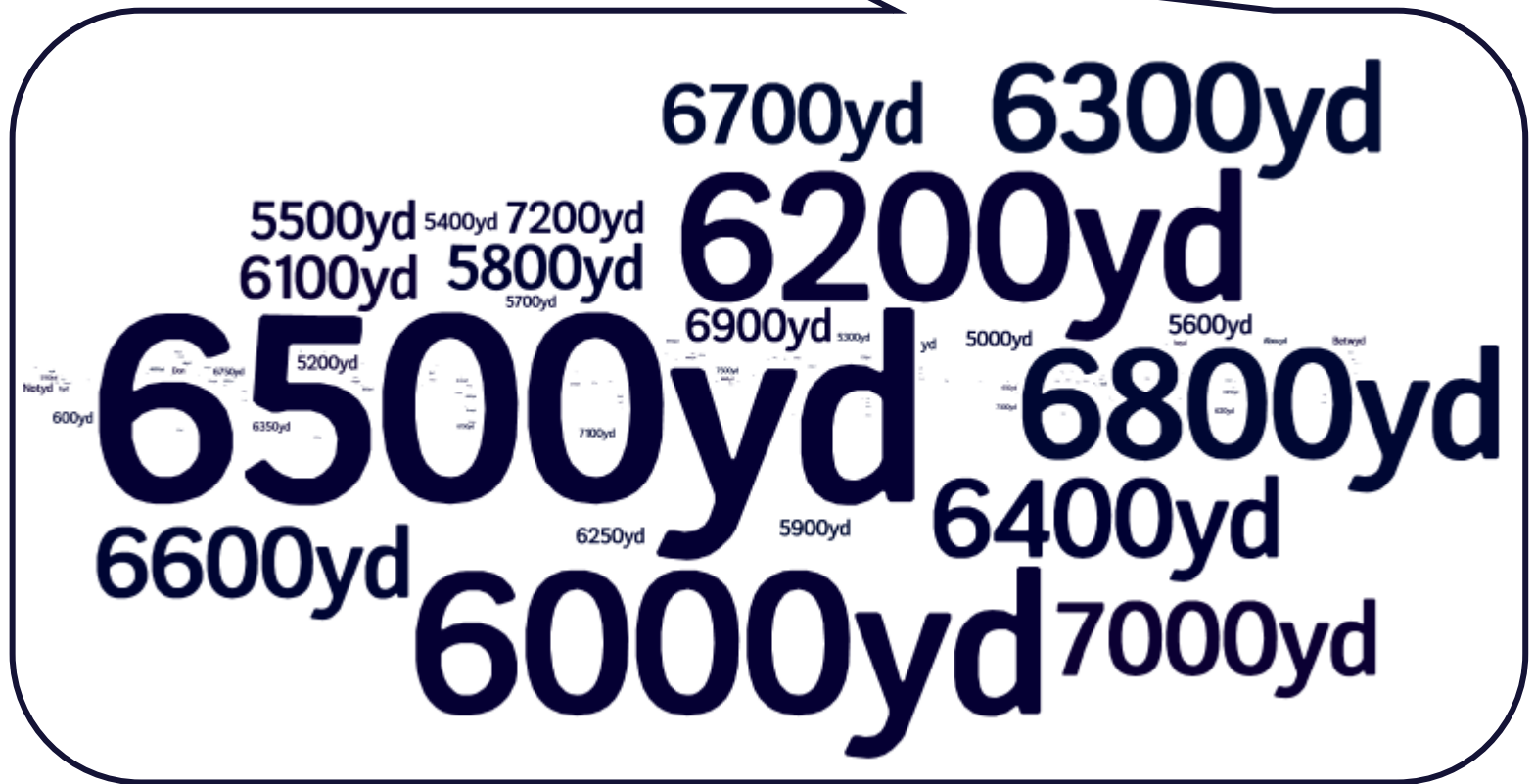
"AN EXTREMELY POSITIVE IMPACT ON MY SATISFACTION" TOP 3

- Speed of others on the course (65%)
- Corrective actions for golfers not following pace standards (45%)
- Enjoyable course design for all types of golfers (44%)

ON-COURSE EXPERIENCE | Ideal course length

Q. What would be a ideal course length for you? OPEN ENDED RESPONSE

Asked to those who said that if the length of the course was “ideal”, it would have an extremely positive impact on their satisfaction...



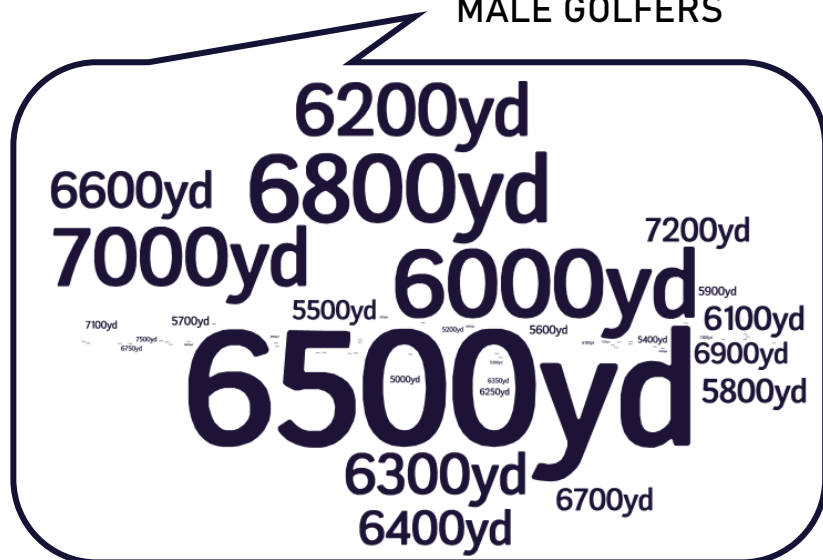
Base: 973

ON-COURSE EXPERIENCE | Ideal course length – by gender

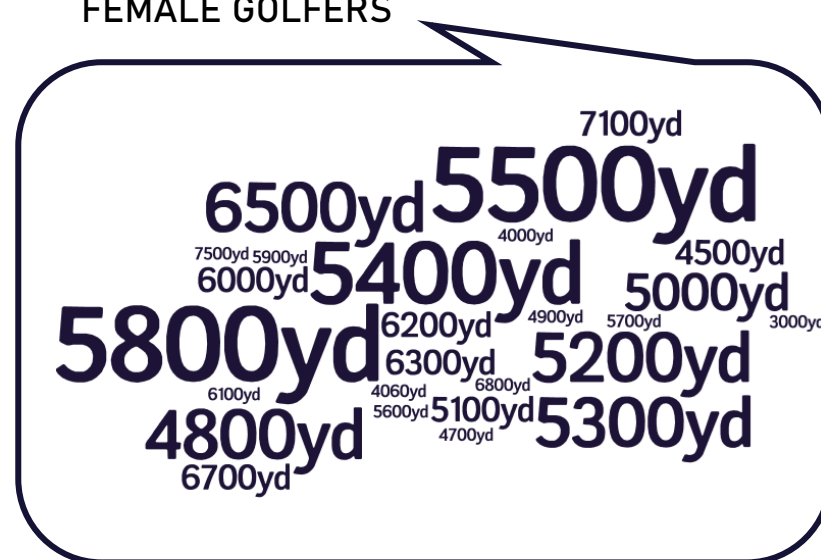
Q. What would be a ideal course length for you? OPEN ENDED RESPONSE

Asked to those who said that if the length of the course was “ideal”, it would have an extremely positive impact on their satisfaction...

MALE GOLFERS



FEMALE GOLFERS



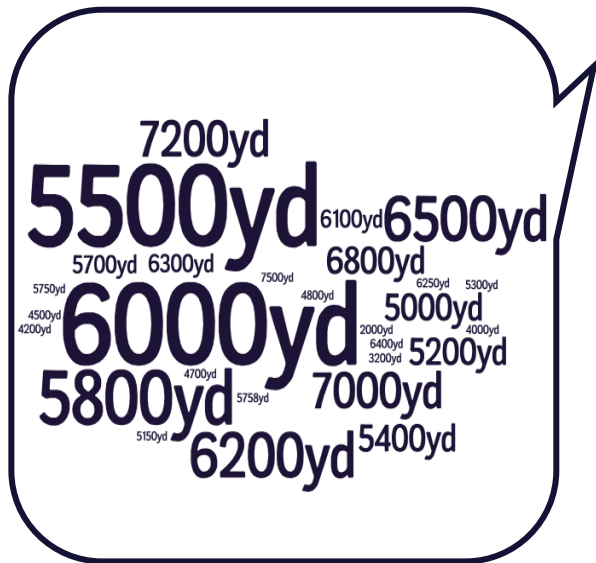
Base: Male – 766, Female – 61

ON-COURSE EXPERIENCE | Ideal course length – by driving distance*

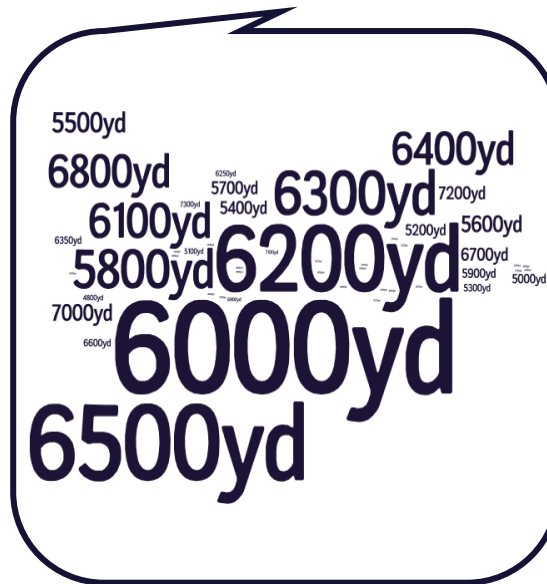
Q. What would be a ideal course length for you? OPEN ENDED RESPONSE

Asked to those who said that if the length of the course was “ideal”, it would have an extremely positive impact on their satisfaction...

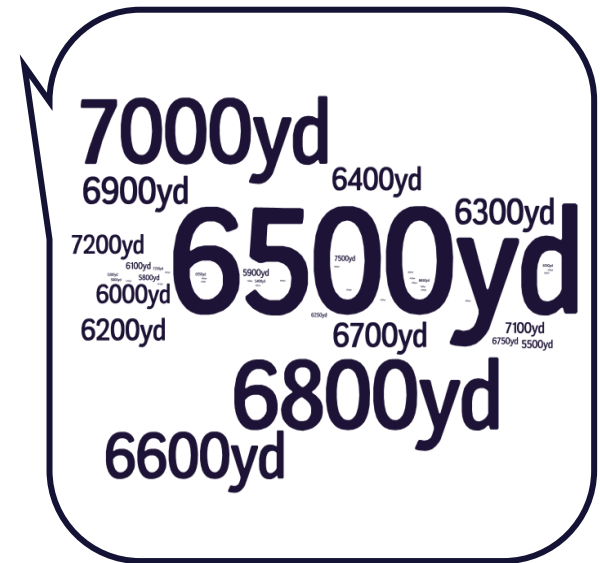
SHORT DRIVE



MEDIUM DRIVE



LONG DRIVE



Base: Short drive - 74, Medium drive - 351, Long drive - 402

* Short drive = Female <135 yd. / Male <190 yd., Medium drive = Female 135-189 yd. / Male 190-230 yd., Long drive = Female 190+ yd. / Male 231+ yd.

ON-COURSE EXPERIENCE | Ideal course features

Q. What would be ideal course features for you? OPEN ENDED RESPONSE

Asked to those who said that if the features of the course were “ideal”, it would have an extremely positive impact on their satisfaction



Base: 3748

ON-COURSE EXPERIENCE | Ideal course features

Q. What would be ideal course features for you? OPEN ENDED RESPONSE

Country club with fewer than 300 members, easy to obtain prime tee times, excellent maintenance practices, especially smooth and fast greens (9 - 12 stimp). Interesting green complexes. soft, smooth greens that putt true without grassy bounces

Fair lengths. Wide fairways. Level fairways in superb condition. Large greens in superb condition.. Interesting greens.

Pace of play, well kept greens that are fast but not hard as a rock. Well manicured fairways and tee boxes. The presence of a starter and marshals to ensure pace of play is enforced. Golf should not take longer than 4 hours

Nice wide fairways on 1/2 of the holes... designed for all types of golfers...well designed greens... 1/3 water holes...some elevation changes...i.e. from fairway to greens.

Well-maintained landscaping

Dog legs, some water holes, elevated greens, good rough, good sand in the bunkers, fairways well maintained and an interesting layout.

Level tee boxes with wide fairways and less undulated greens.

If I have learned anything during this time of COVID-19, it's that giving each golfer their own cart considerably speeds up play. I think it's time for golf courses to invest in single seat golf carts, golf bikes, or golf boards. I realize this may be expensive initially but they could be phased in over time. My foursome has actually finished rounds of golf in 3.5 hours with our own carts, where it may take 4.5 before.

Slightly hilly. Good sand. Receptive greens. Great green mowers (humans). Fairly level tees. Greens all equal in roll speed. Occasional ranger on course. No trash and cigarette butts or sunflower seeds.

Reasonable length, no "tricked up" holes, no blind shots, consistent speed of greens, well maintained.

Lots of challenging and fast, undulating greens. Lots of sand and water, elevation changes.

Wide fairways. Rough not too long. No areas of deep weeds or dense trees. My drives get to 150-130 yds. from the green.

Great condition of surface areas, beautiful environment, lake/water views, friendly and helpful staff.

ON-COURSE EXPERIENCE | Ideal golf experience

Q. Thinking about all types of factors (personal, social and environmental), please describe what your 'ideal' golf experience would be like.
OPEN ENDED RESPONSE

KEY THEMES

- The course itself
- Playing conditions / greens
- Playing with friends
- The weather
- The challenge of the game
- The pace of play
- Playing partners
- Time to play
- Food and drink
- Playing well
- Customer service
- Design and layout of the course
- Friendly members
- Being with family
- Having fun
- Attractive scenery
- Cost
- Banter and laughs
- Tee options
- Practice facilities



ON-COURSE EXPERIENCE | Ideal golf experience

Q. Thinking about all types of factors (personal, social and environmental), please describe what your 'ideal' golf experience would be like.
OPEN ENDED RESPONSE



Well maintained course conditions throughout and distances that allow GIR for a mid teens handicap index. Well stocked pro shop and snack bar area. Hydration and restroom facilities on the course.

Enjoying the weather, playing with friends, on a course we're familiar with.

Friends, 4 hr casual round without rushing or feeling pressed, challenging but fair holes

Welcoming club host; great golf history in the clubhouse; friendly members; excellent showers and good personal care amenities. Bar staff always friendly and gracious.

Great day, good pals, good swing day, great putting

Playing to ability with golf friends on a nice day with low humidity.

A well manicured, scenic and cared for course. 2 friends of equal talent and 1 better than me. A round in the 70's. A good 19th Hole.

Mid morning tee time, warm with minimal wind and friends usually play with. Shooting my age or less.

Playing with friends and relatives.

Four friends, scenic course, interesting layout, greens in good condition

Nicely maintained course at a reasonable price, that moves along at a good pace. Nice people

Well maintained grass and greens. That's it.

i like courses with lots of natural areas, and to see wildlife while playing

Playing a mildly challenging course, with fair roughs and bunkers, with equal playing partners.

Some undulation and character to the course. Add in some hazards. I am most comfortable playing courses with little to no houses on the course.



ON-COURSE EXPERIENCE | What would make it more satisfying?

What would make the golf course experience more satisfying for you?
OPEN ENDED RESPONSE

KEY THEMES

- Course conditions
- Pace of play – the majority wanting a faster pace, but some wanting a slower pace
- Better personal performance
- Condition of greens
- Availability of tee times
- Tee options and condition of tees
- Good company

Many people mentioned pace of play as something that could improve satisfaction. Generally this involved speeding up the pace and moving slow golfers through more quickly, although some people would like the pace to be slowed, or to be able to play at less busy times so they didn't hold others up. Good and consistent condition of the course and tees was another main area for increasing satisfaction, as was a desire for good company and pleasant behavior from other golfers.



ON-COURSE EXPERIENCE | What would make it more satisfying?

What would make the golf course experience more satisfying for you?

OPEN ENDED RESPONSE

Fast paced play

Lower cost, more natural areas - courses do not need 100% of the grounds groomed. Let's look at natural areas to reduce carbon footprint, sustainability, natural beauty, faster speed of play, (this survey was probably too long for most people to want to complete)

Night golf. I used to teach at Mission Hills in China and half of their 18-hole courses were lit. We'd play from 10pm-1am, zip around the course and it was a lot of fun.

Courses need to put water fountains or jugs back on the course.

To have the forward tees not be just an afterthought. I would like to see several options tee options for women. Our club is a very male dominated club and women are not taken seriously on the course. Most courses are all about men's enjoyment what ever their ability. Not so much for women.

It may sound crazy, but I would like to play 12 holes. It would shorten the day. After 12 holes I start to think about things I have to do and I begin to lose concentration.

Mostly when I play well - it's typically not the course's fault if I don't enjoy my round. Pace of play or rude golfers can take the enjoyment out of a round.

Slow Pace of play is the only thing that makes a round unsatisfactory for me.

Respect for female golfers. There are still too many courses that treat us like 2nd class citizens which is short-sighted given where the grow of the game is right now (women and girls).

Do away with slow play!

When I play well, with good mates, at the right pace (3:45 to 4:15 for 18 walking).

Course that is well conditioned, has sweeping views, good fellowship.

Nice day and good company is all I'm really interested in

The ability to play better!!!! Also, the capability to know when the course was not crowded so I could get on and not bother anybody and not be bothered by anybody. I worry a lot that my game is embarrassing to watch and to play with, so I would rather not bother good golfers or to embarrass myself.

The beauty and serenity of the course, and the people I play with not taking the game too seriously.

Having a golf course to myself where I don't have to worry about other people trying to rush me.

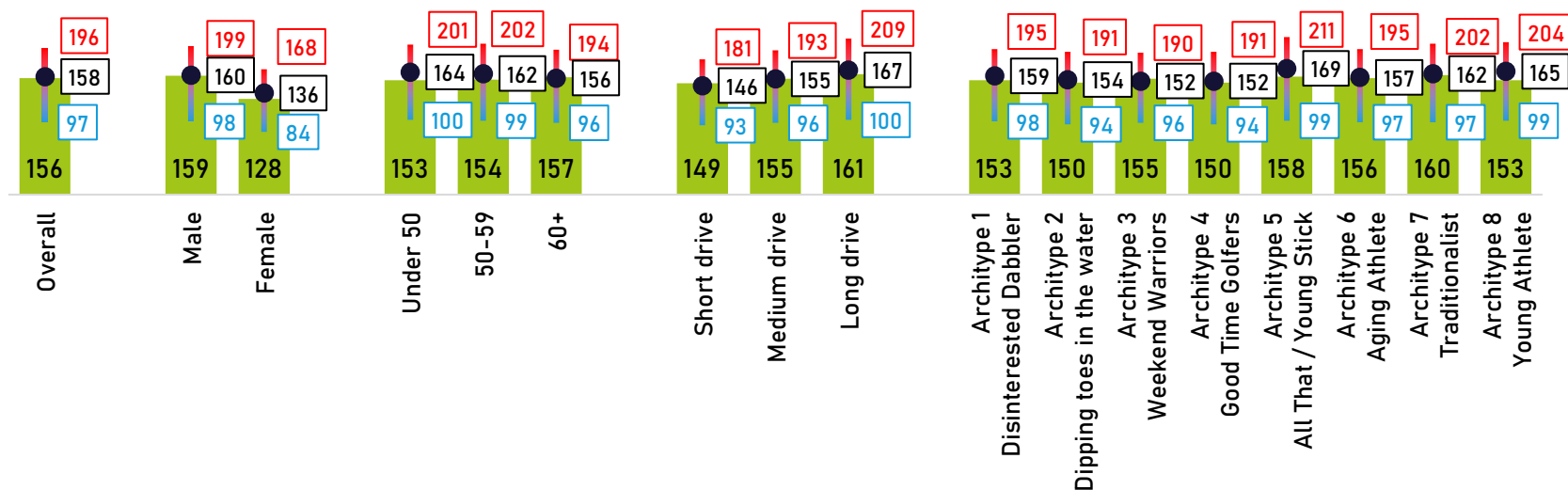
ON-COURSE EXPERIENCE | Ideal hole length – Par 3

Q. Thinking specifically about par 3 holes...

- Length of most memorable par 3
- Par 3 too long that it's no longer satisfying
- Par 3 too short to be satisfying
- Reasonable length of a par 3

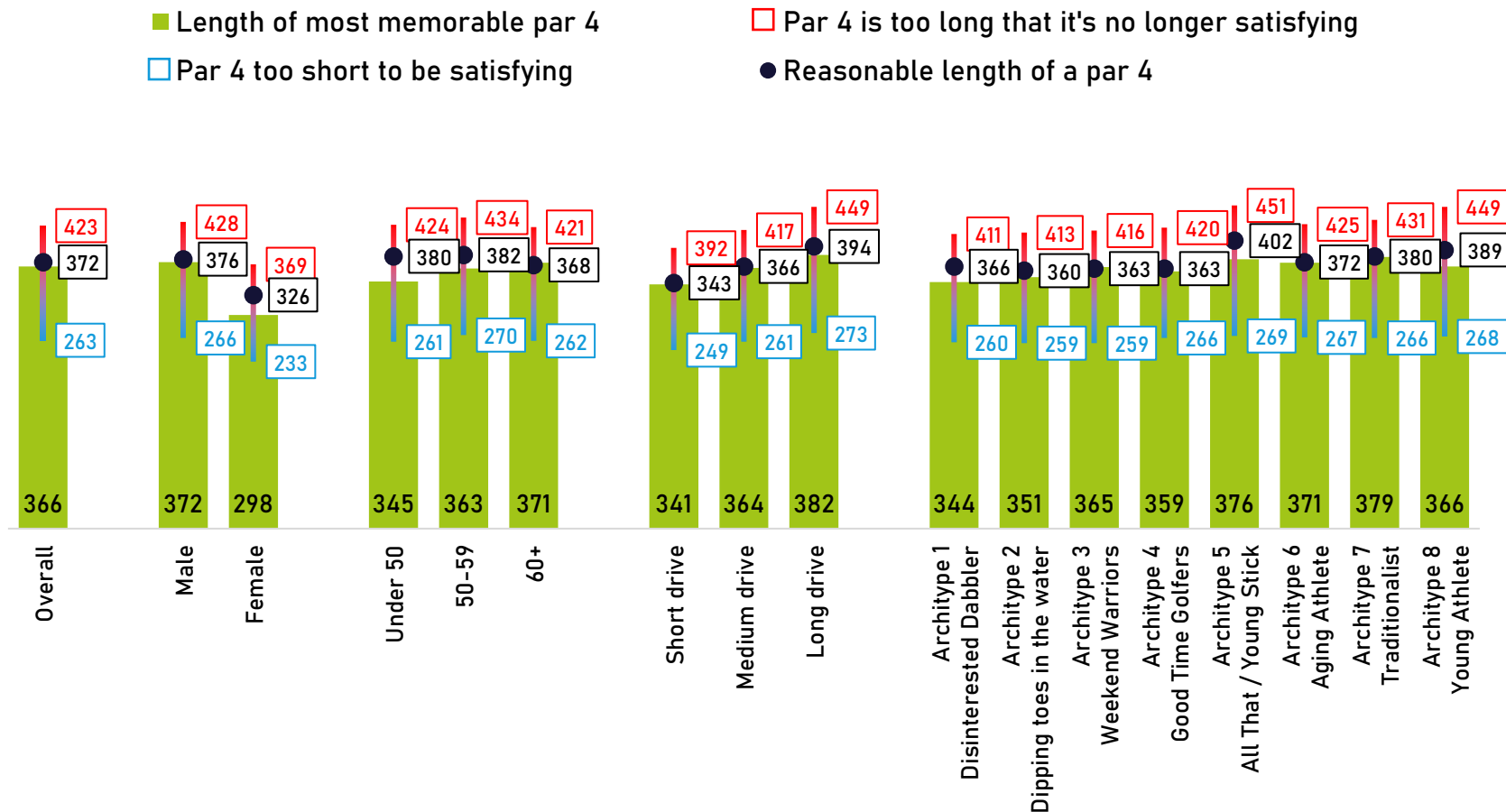
This and the following two charts show the range of lengths seen as acceptable to golfers:

- Figures in **red** show the average length where a hole is considered too long to be satisfying.
- Figures in **blue** show the average length where a hole is considered too short to be satisfying.
- The black markers show the average reasonable length.
- The **green** bars show the length of the most memorable hole.



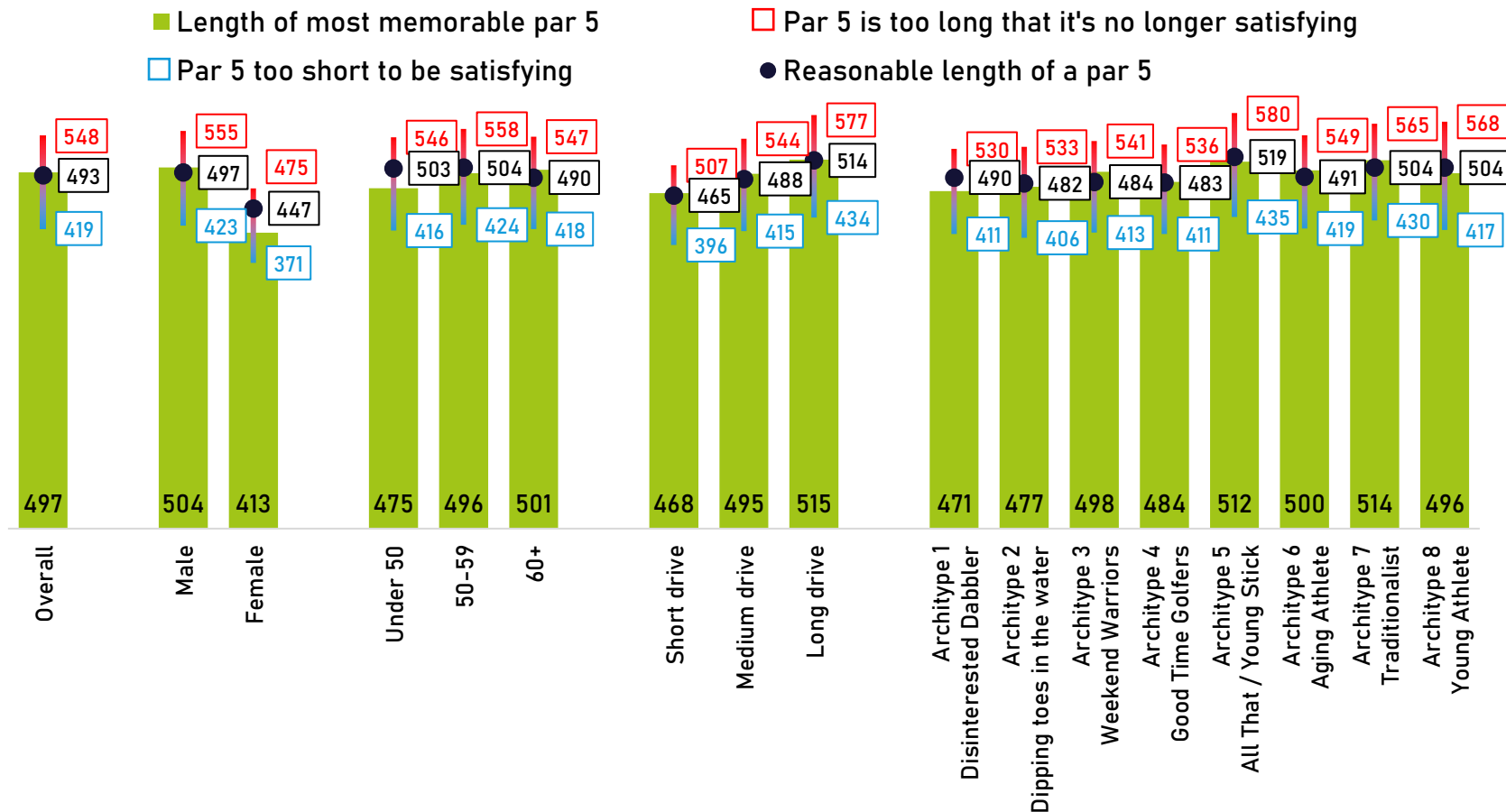
ON-COURSE EXPERIENCE | Ideal hole length – Par 4

Q. Thinking specifically about par 4 holes...



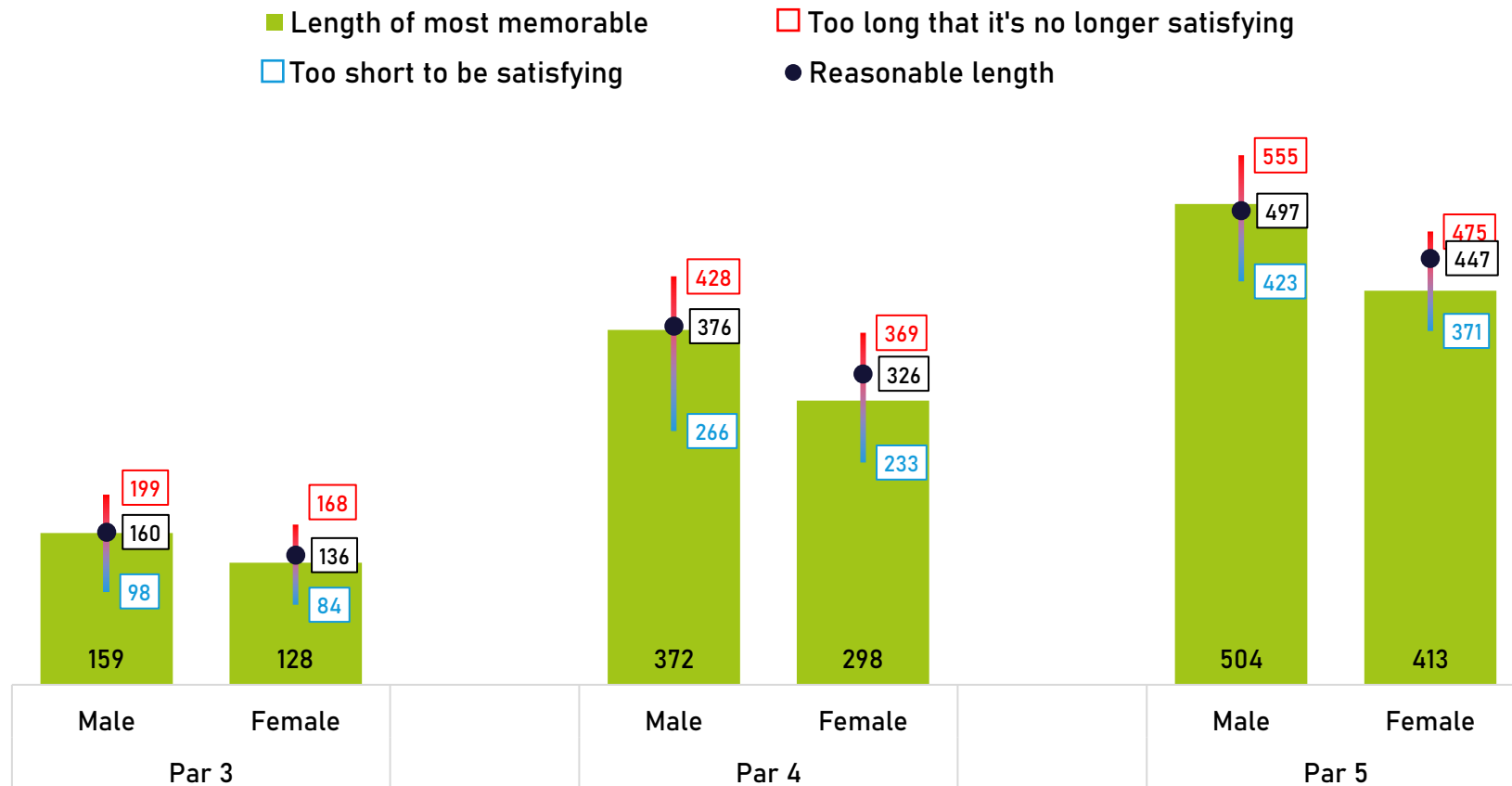
ON-COURSE EXPERIENCE | Ideal hole length – Par 5

Q. Thinking specifically about par 5 holes...



ON-COURSE EXPERIENCE | Ideal hole length – By gender

Q. Thinking specifically about par 3 / par 4 / par 5 holes...

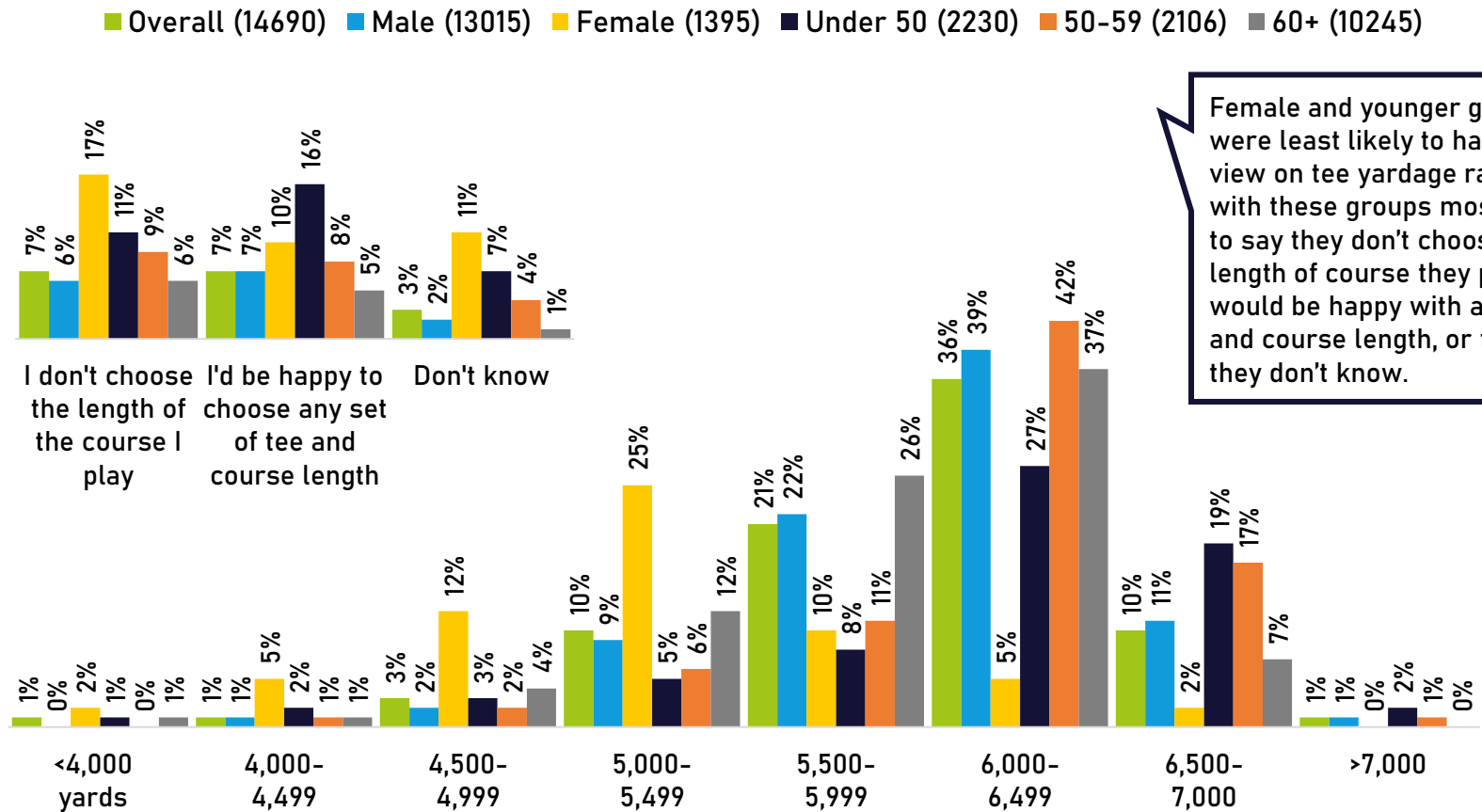


TEE SELECTION



TEE SELECTION | Tee preference

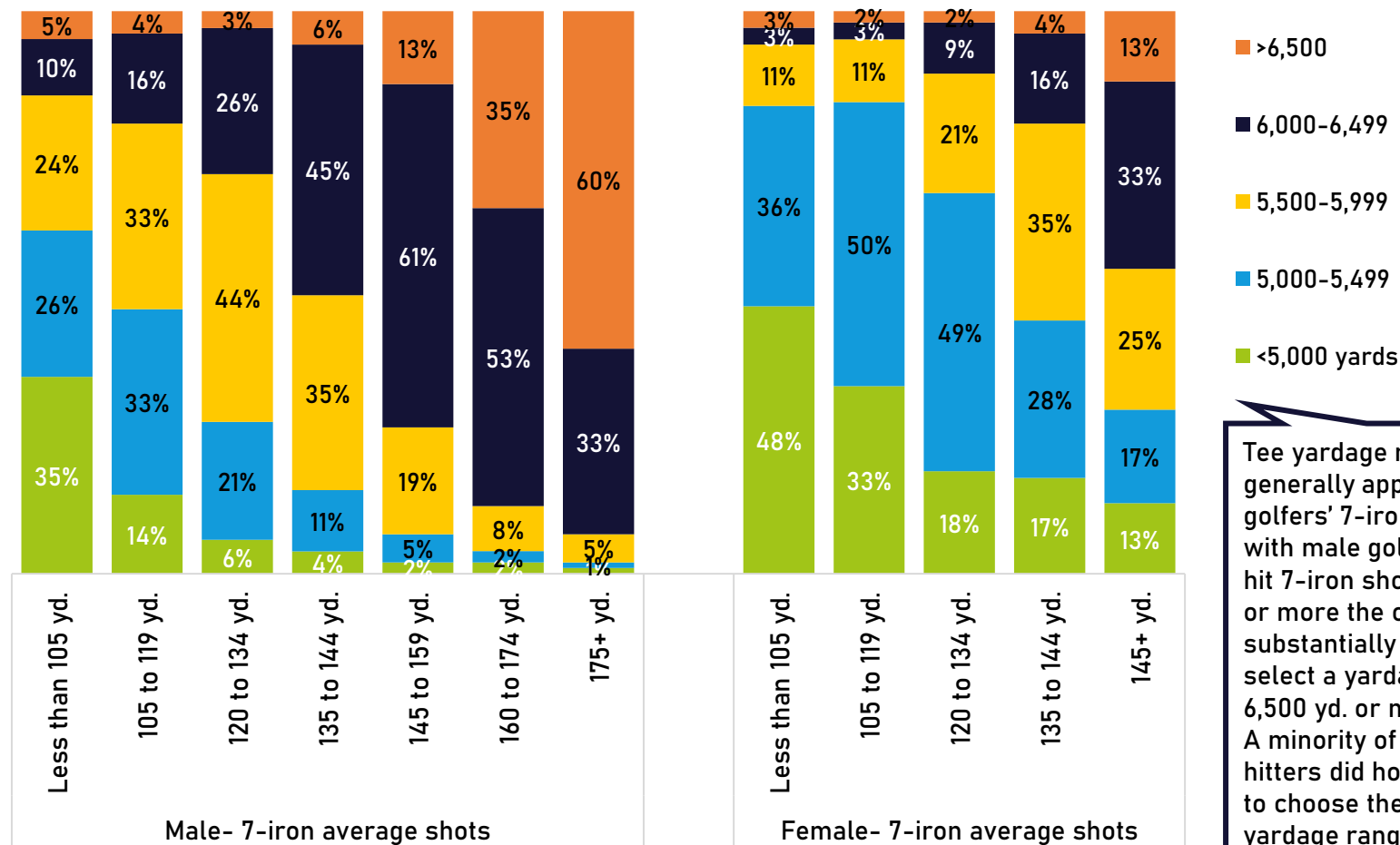
Q. On a typical 18-hole golf course, what yardage range most closely match the set of tees you choose?



Base numbers shown in brackets

TEE SELECTION | Tee preference – By 7-iron distance

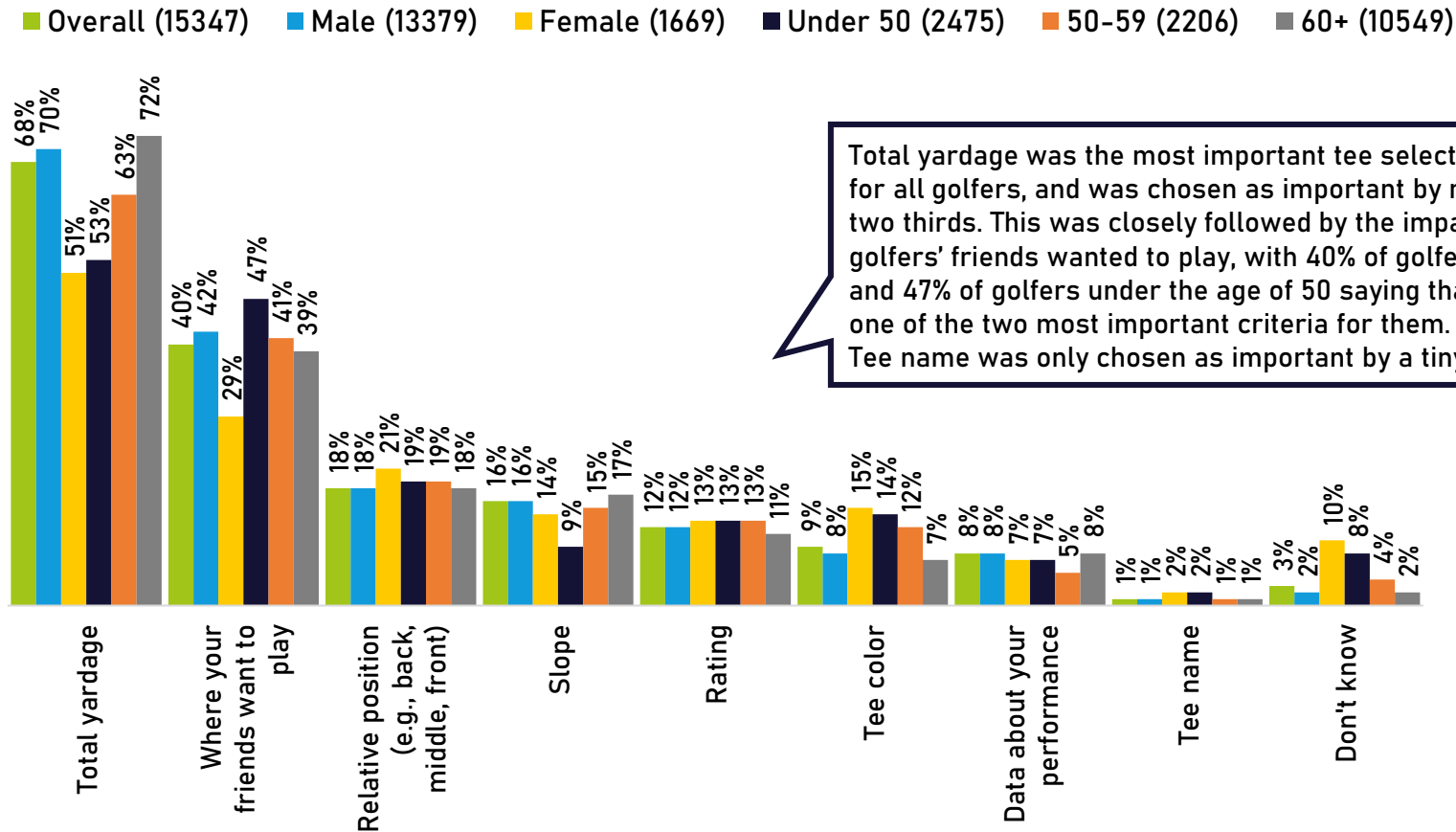
Q. On a typical 18-hole golf course, what yardage range most closely match the set of tees you choose?



Base numbers shown in brackets

TEE SELECTION | Tee selection criteria

Q. When playing golf, what are the two most important criteria when you choose a set of tees?

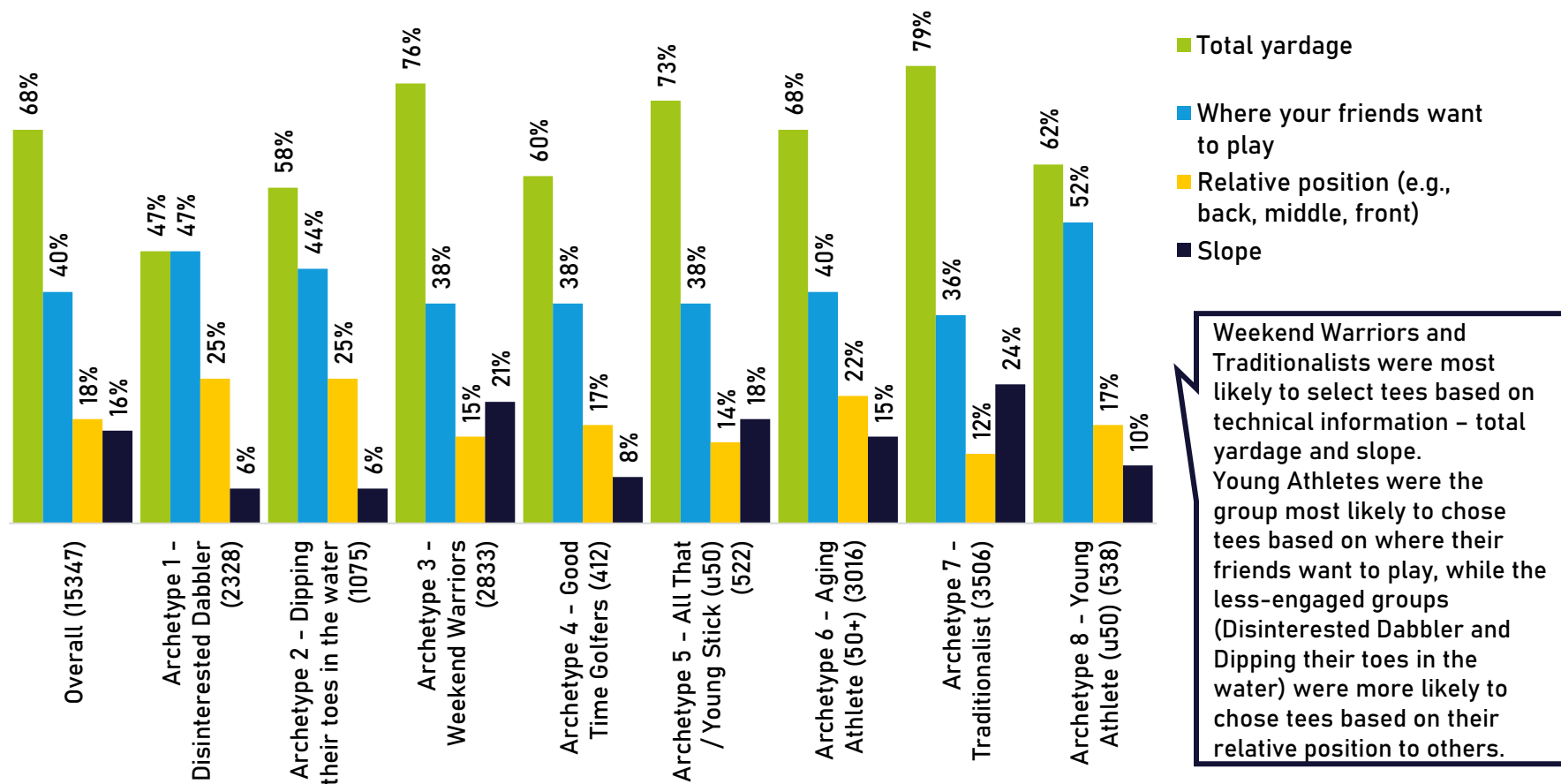


Base numbers shown in brackets

TEE SELECTION | Tee selection criteria – by archetype

Q. When playing golf, what are the two most important criteria when you choose a set of tees?

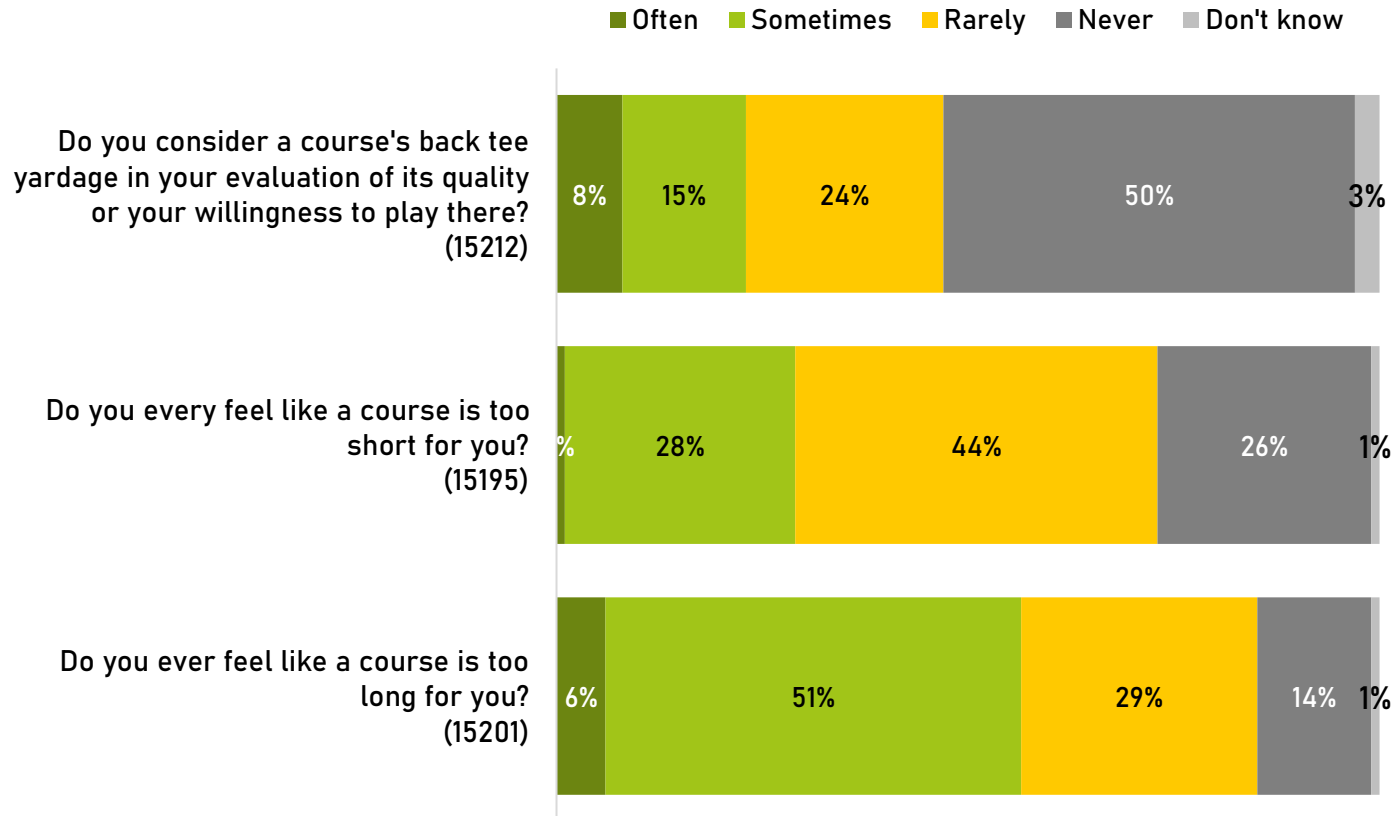
OVERALL TOP 4 SHOWN ONLY



Base numbers shown in brackets

TEE SELECTION | Impact of course yardage

Q. Below are some questions about yardage on the course. Please let us know how regularly, if at all, these issues affect you:

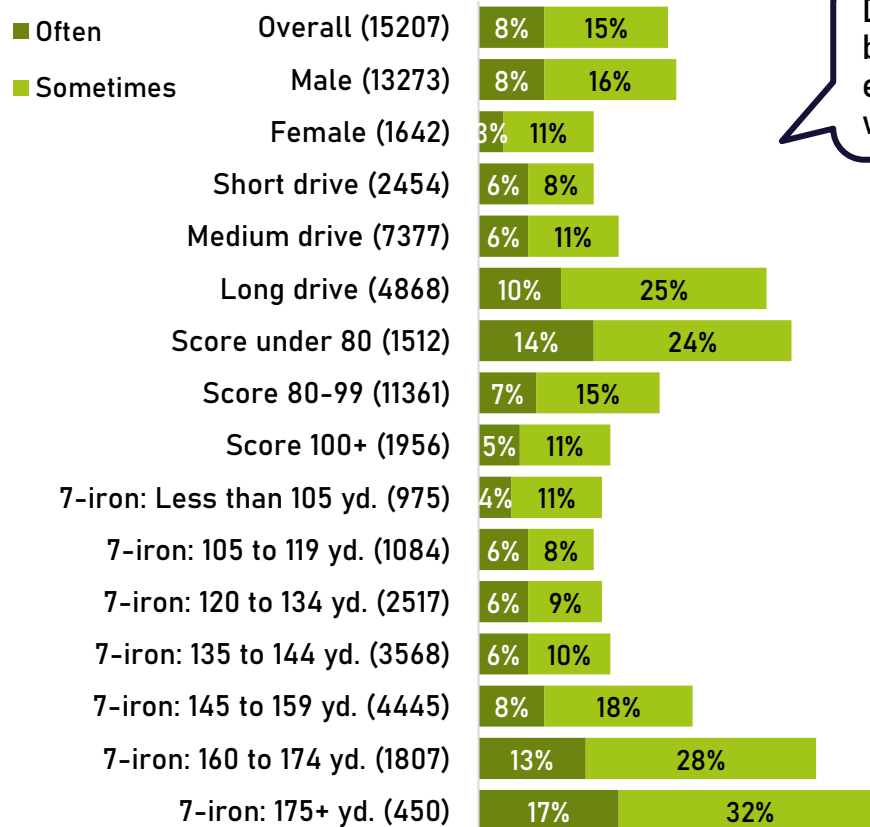


Generally golfers did not consider a course's back tee yardage in their evaluation. Most golfers did feel the sometimes a course was too long for them, but rarely or never did they feel that a course was too short for them.

Base numbers shown in brackets

TEE SELECTION | Consideration of back tee yardage

Q. Below are some questions about yardage on the course. Please let us know how regularly, if at all, these issues affect you:



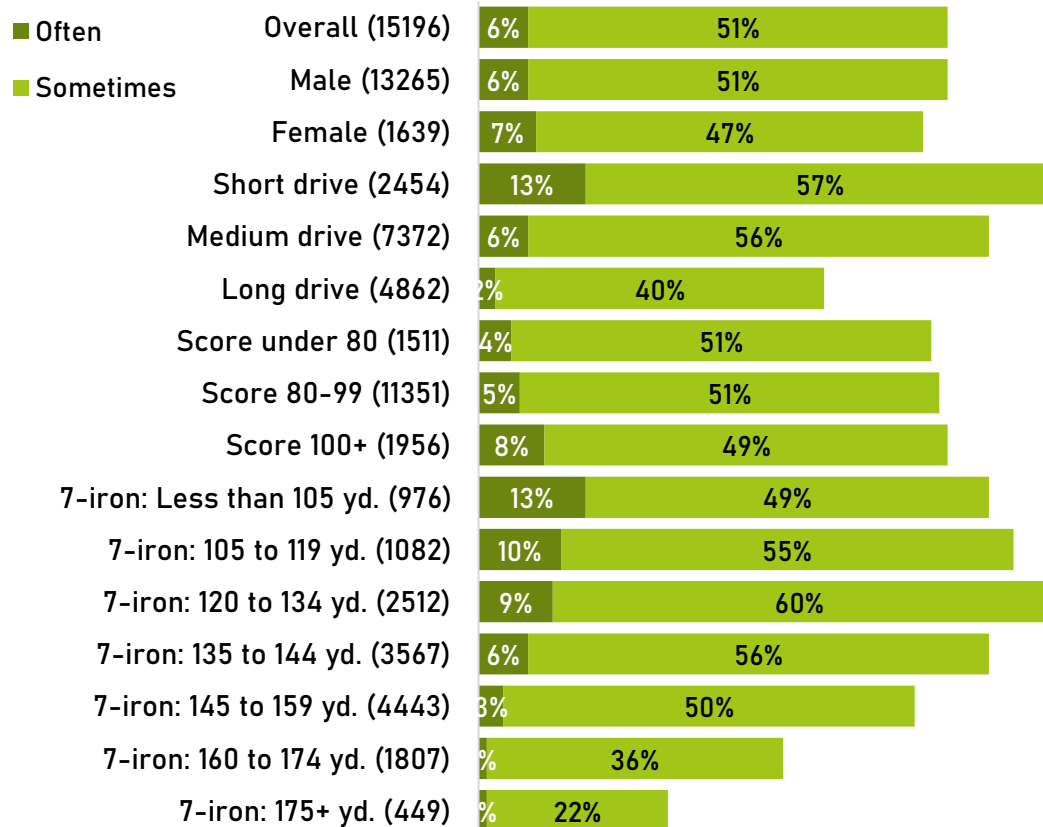
Do you consider a course's back tee yardage in your evaluation of its quality or your willingness to play there?

Understandably, longer hitters and better golfers with a typical score under 80, were more likely to consider back tee yardage as part of their course evaluation process.

Base numbers shown in brackets

TEE SELECTION | Course feels too long

Q. Below are some questions about yardage on the course. Please let us know how regularly, if at all, these issues affect you:



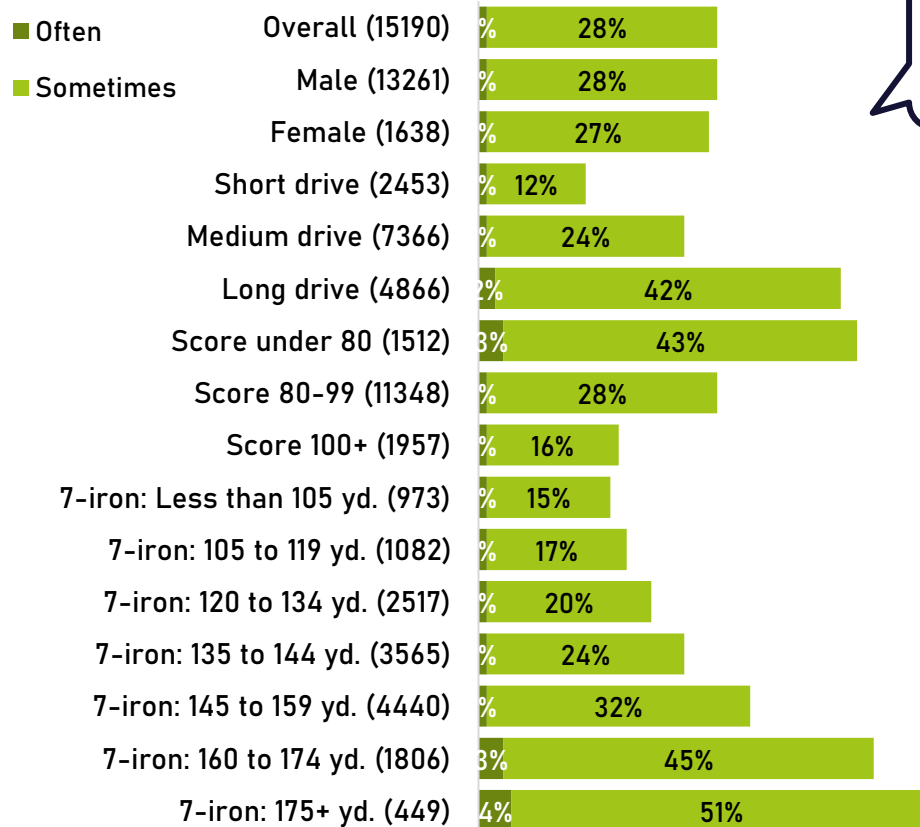
Do you ever feel like a course is too long for you?

Even big hitters did sometimes feel that a course was too long for them. This was felt 'often' by shorter hitters though.

Base numbers shown in brackets

TEE SELECTION | Course feels too short

Q. Below are some questions about yardage on the course. Please let us know how regularly, if at all, these issues affect you:



Do you ever feel like a course is too short for you?

Feelings of a course being too short for a golfer were only really experienced by the longest hitters and better golfers with a typical score under 80.

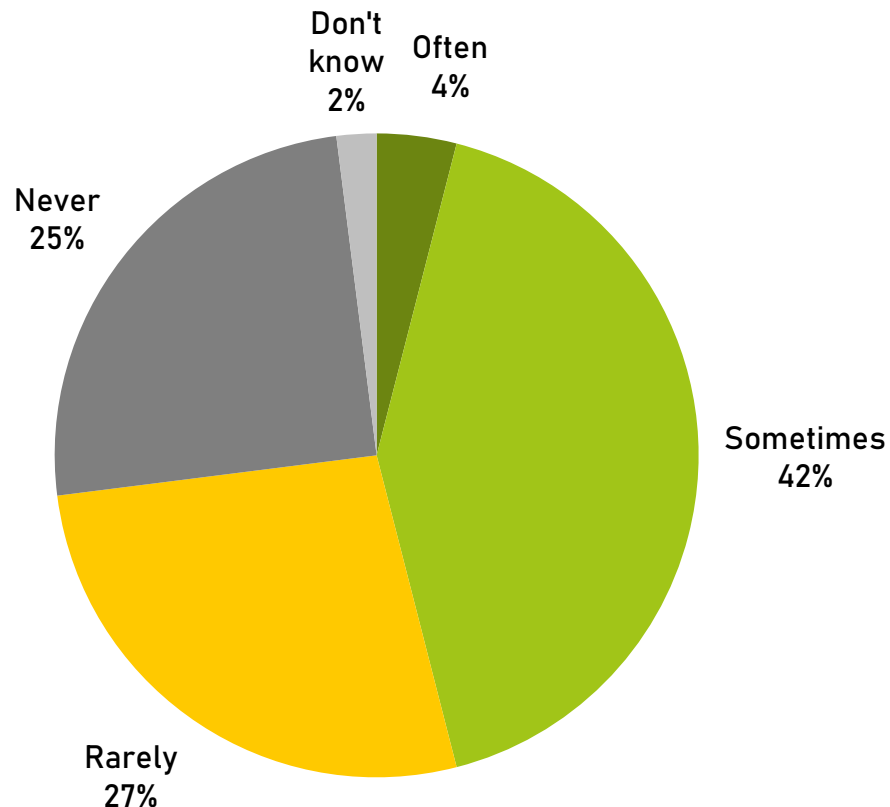
Base numbers shown in brackets

TEE SELECTION | Group influence on tee selection

Q. Below are some questions about yardage on the course. Please let us know how regularly, if at all, these issues affect you:

Do you ever play a longer tee because others in your group are playing a different tee than your preference?

Only a quarter overall said they never played a longer tee because of others in their group. The majority said they 'sometimes' play a longer tee than they otherwise would because of the tee selection of others.

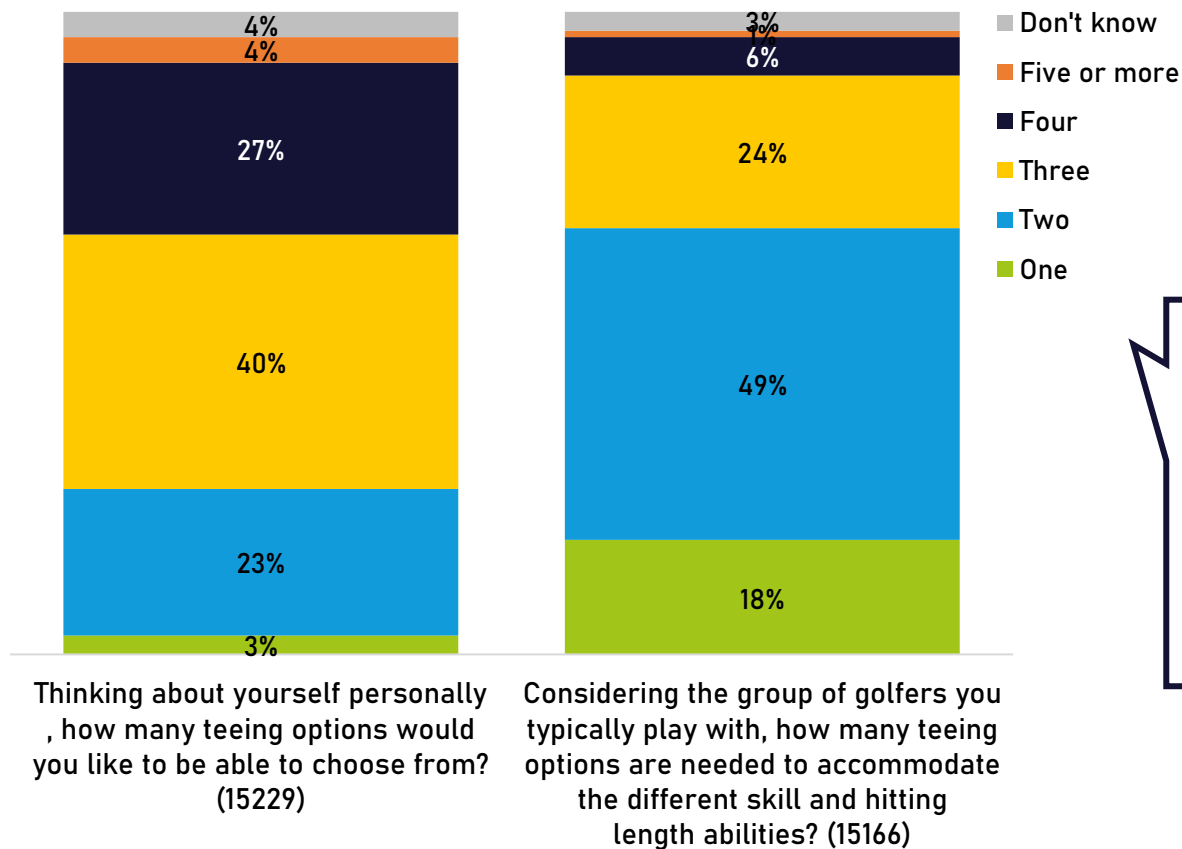


Base numbers shown in brackets

TEE SELECTION | Personal vs group tee options

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

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



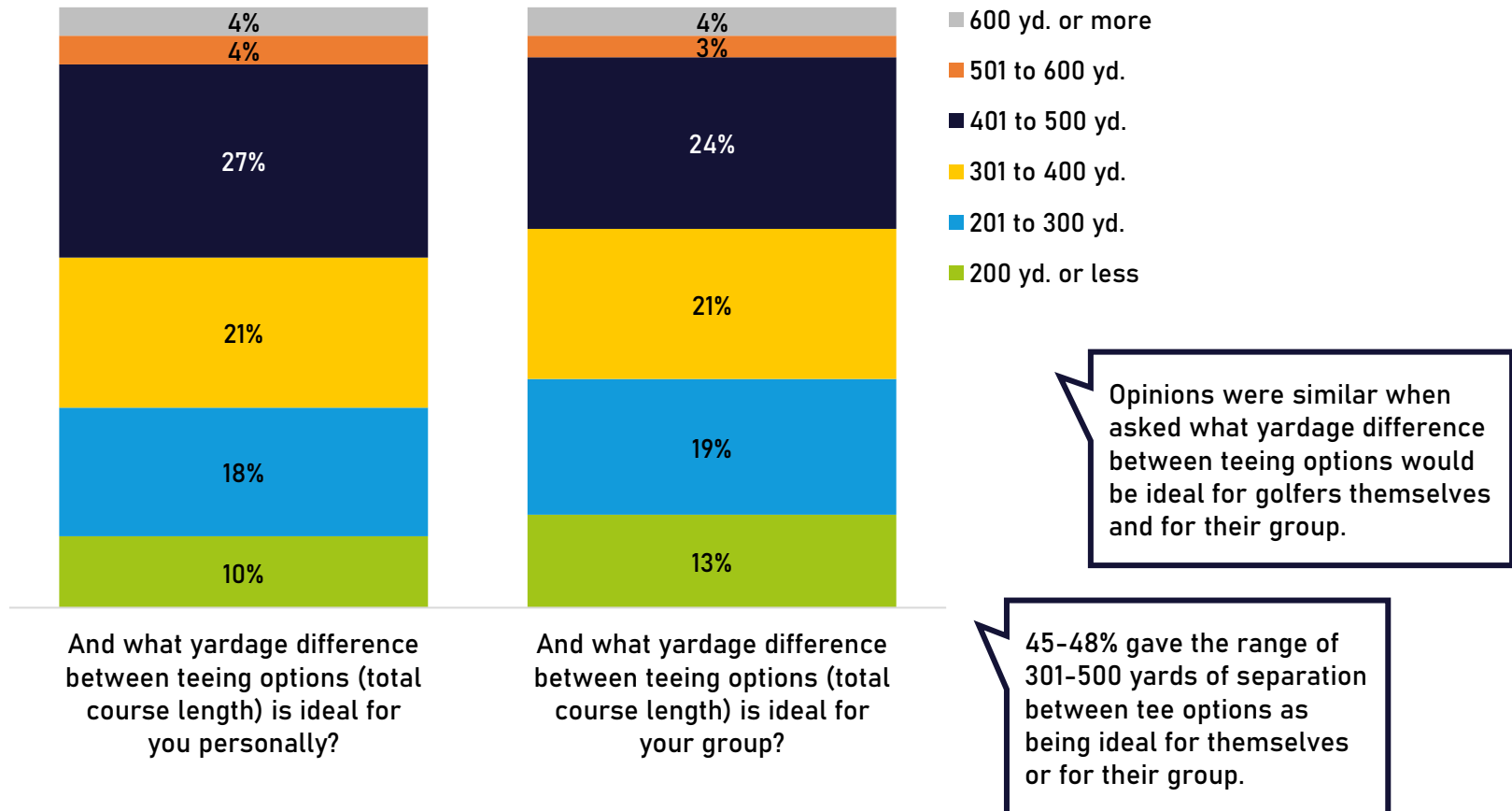
Personally, golfers would like to have a range of teeing options, with 71% saying they would like three or more tees to choose from. When asked about their typical playing group, an almost equal proportion (67%) said that just one or two teeing options would be sufficient.

Base: 15102-15229

TEE SELECTION | Personal vs group tee yardage requirements

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

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



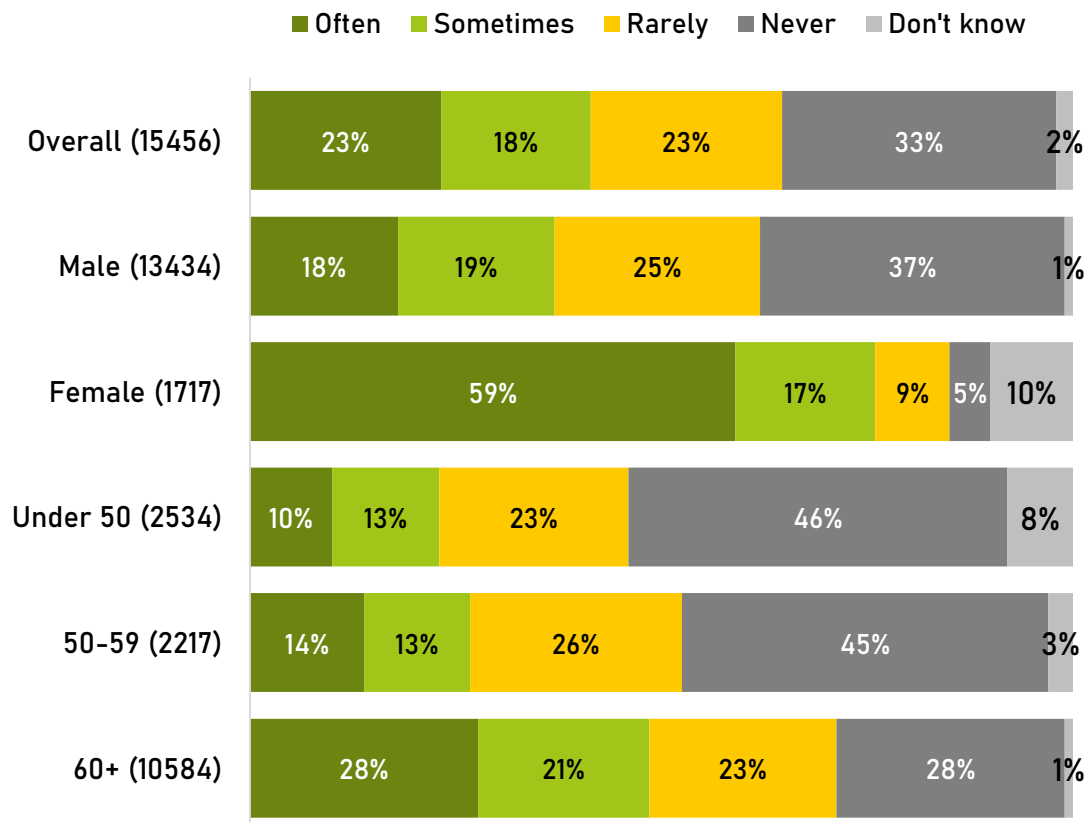
Base: 15102-15229

TEE ATTITUDES



TEE ATTITUDES | Playing the forward tees

Q. How often do you play the forward tees?

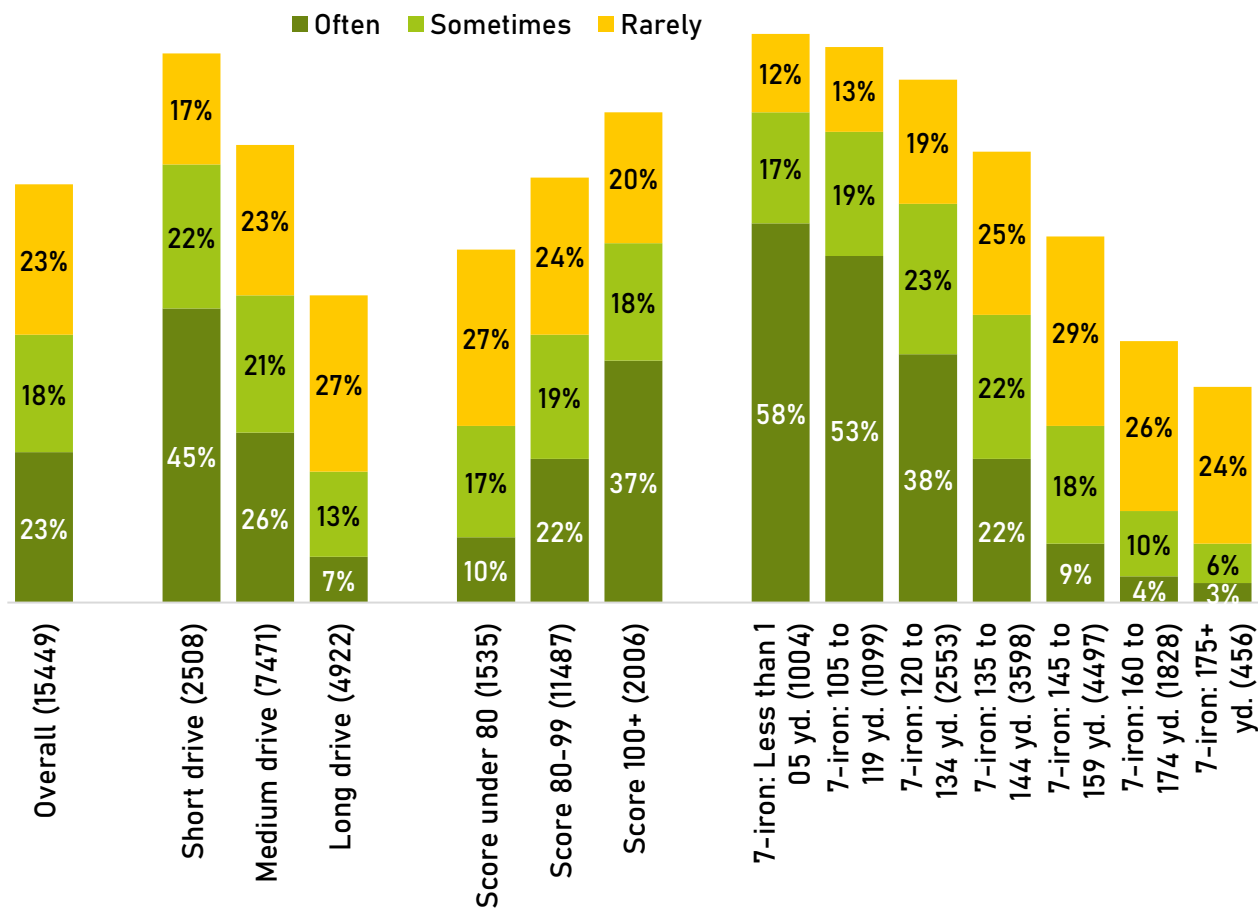


Around a fifth of male golfers said they often play the forward tees, compared to nearly three fifths of female golfers. Older golfers (60+) were also three times more likely to play the forward tees often than younger (u50) golfers.

Base numbers shown in brackets

TEE ATTITUDES | Playing the forward tees

Q. How often do you play the forward tees?

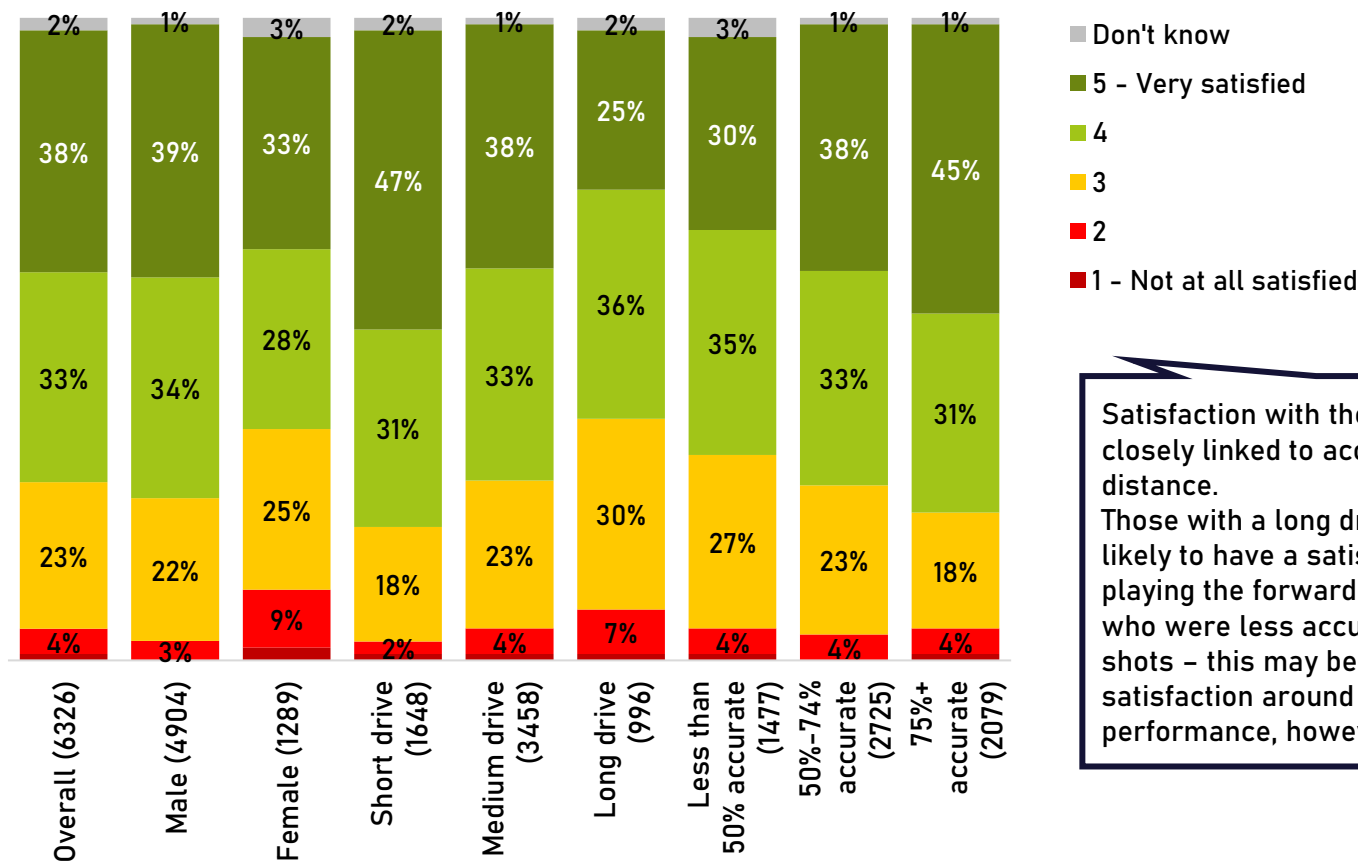


Hitting distance and score were well aligned with forward tee usage, although there was a proportion of short hitters who rarely or never played the forward tees, and a proportion of long hitters who did play the forward tees sometimes or often.

Base numbers shown in brackets

TEE ATTITUDES | Satisfaction with forward tees

Q. How satisfied are you in general with the condition, presentation and overall experience of playing the forward tees?
 ASKED ONLY TO THOSE WHO PLAY THE FORWARD TEES OFTEN OR SOMETIMES



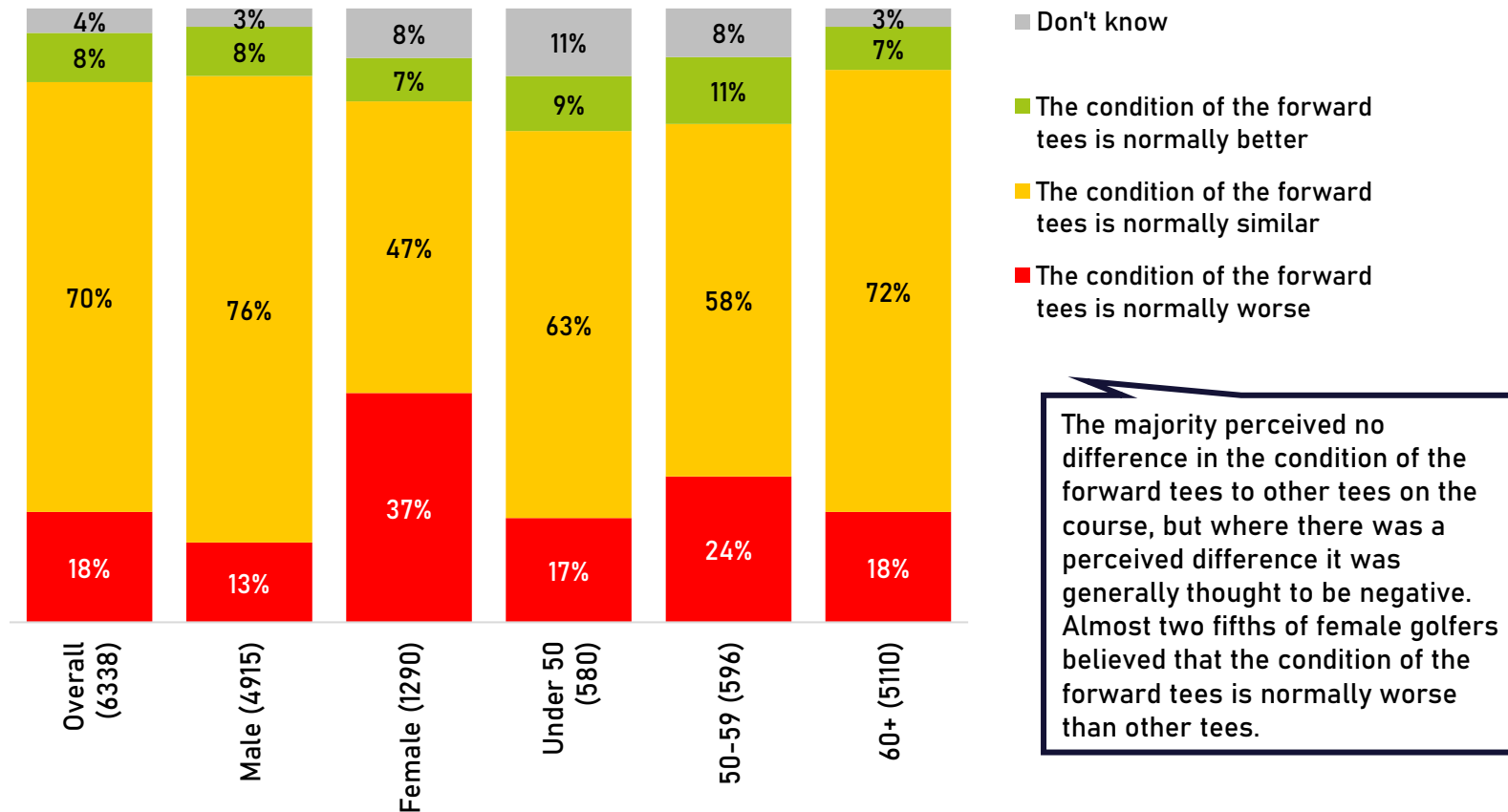
Satisfaction with the forward tees was closely linked to accuracy and driving distance. Those with a long drive were much less likely to have a satisfying experience of playing the forward tees, as were those who were less accurate with their shots – this may be more to do with satisfaction around their own performance, however.

Base numbers shown in brackets

TEE ATTITUDES | Comparison of forward tees to others

Q. Do you normally find the condition and quality of the forward tees to be similar to the rest of the tees on the course?

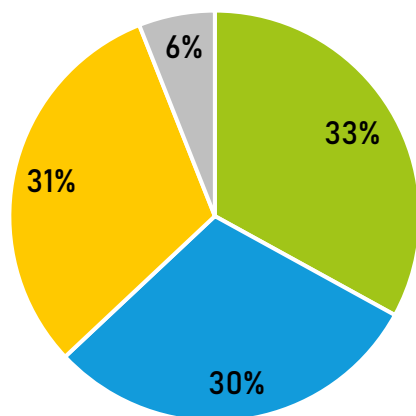
ASKED ONLY TO THOSE WHO PLAY THE FORWARD TEES OFTEN OR SOMETIMES



Base numbers shown in brackets

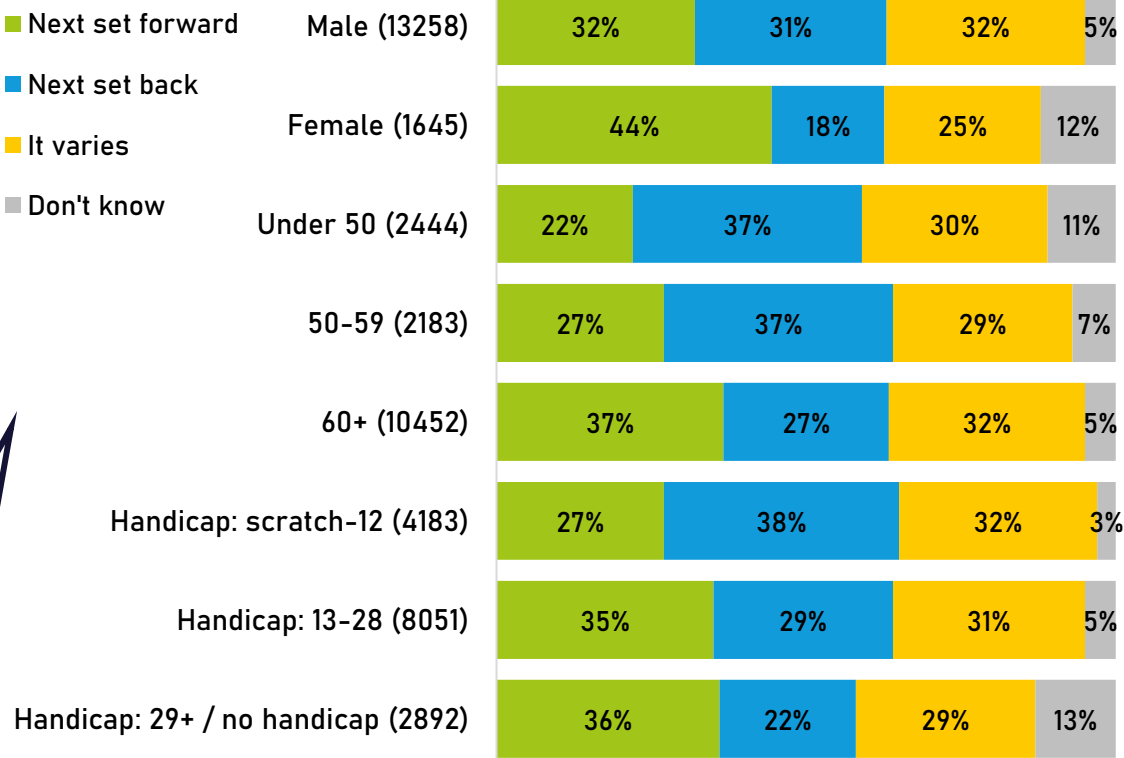
TEE ATTITUDES | Move forward or move back?

Q. If you did not find a set of tees that matched your typical yardage, would you typically choose the next set forward or back?



■ Next set forward
 ■ Next set back
 ■ It varies
 ■ Don't know

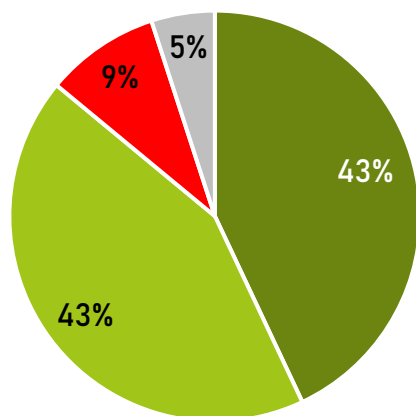
There was a fairly even split overall when we asked if golfers would move forward or back if there was not a set of tees at their typical yardage. Better golfers and younger golfers were the most reluctant to move forward, with around two fifths of each of these groups saying they would tend to move back. Female golfers were more likely to move forward (44%) rather than back (25%) if their typical yardage was not available.



Base numbers shown in brackets

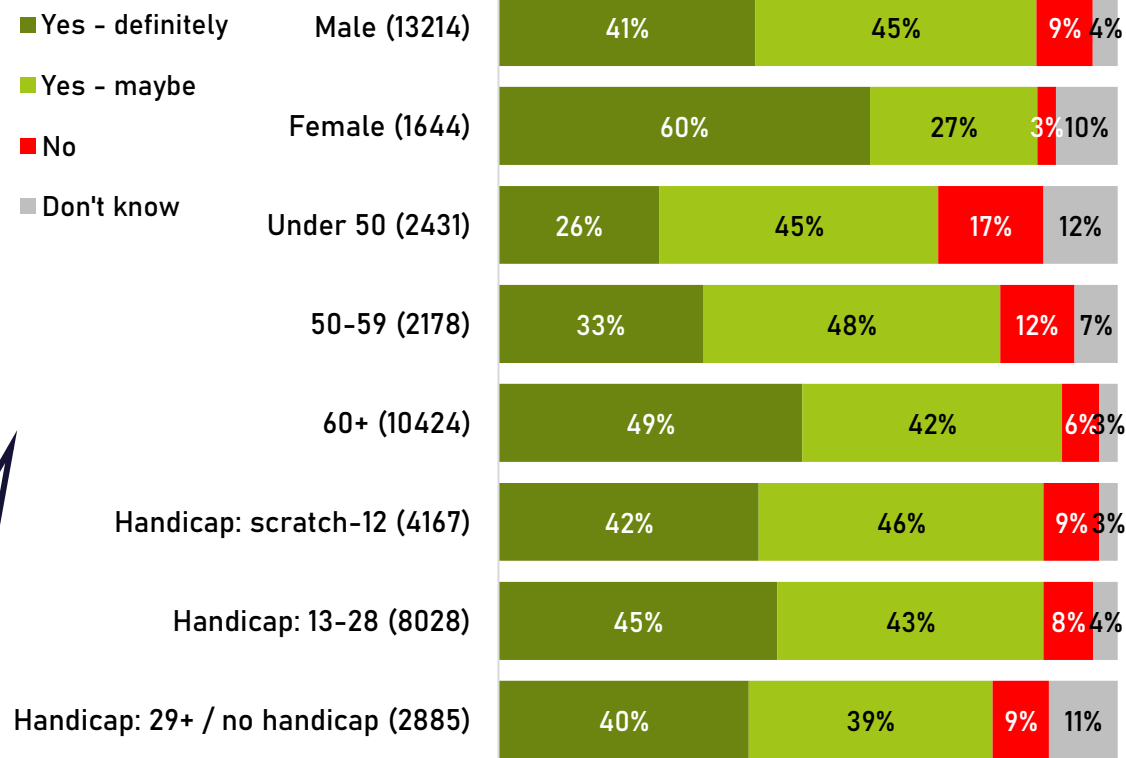
TEE ATTITUDES | Playing the forward tee

Q. Would you play the forward tee if it offered a total yardage in the range you preferred?



The majority said they would play the forward tee if it offered their preferred total yardage, although there was some reluctance, especially amongst younger golfers. Only female golfers showed a strong conviction that they would indeed use the forward tees if they were more suitable.

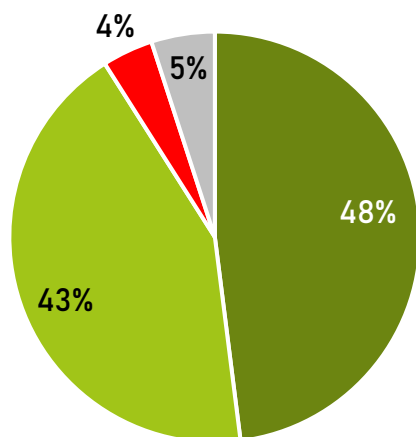
■ Yes - definitely
 ■ Yes - maybe
 ■ No
 ■ Don't know



Base numbers shown in brackets

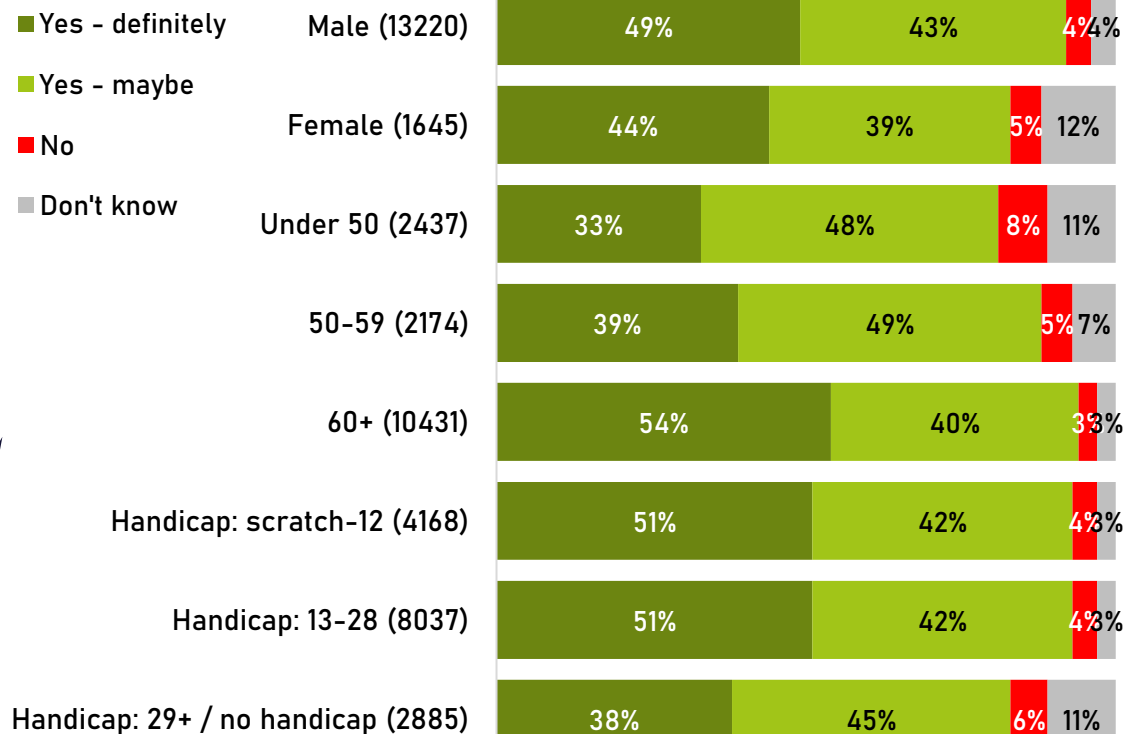
TEE ATTITUDES | Playing the second tee from the front

Q. Would you play the second tee from the front if it offered a total yardage in the range you preferred?



Generally there was agreement that golfers would play the second tee from the front if it offered a total yardage they preferred. The greatest reluctance was again from the youngest golfers.

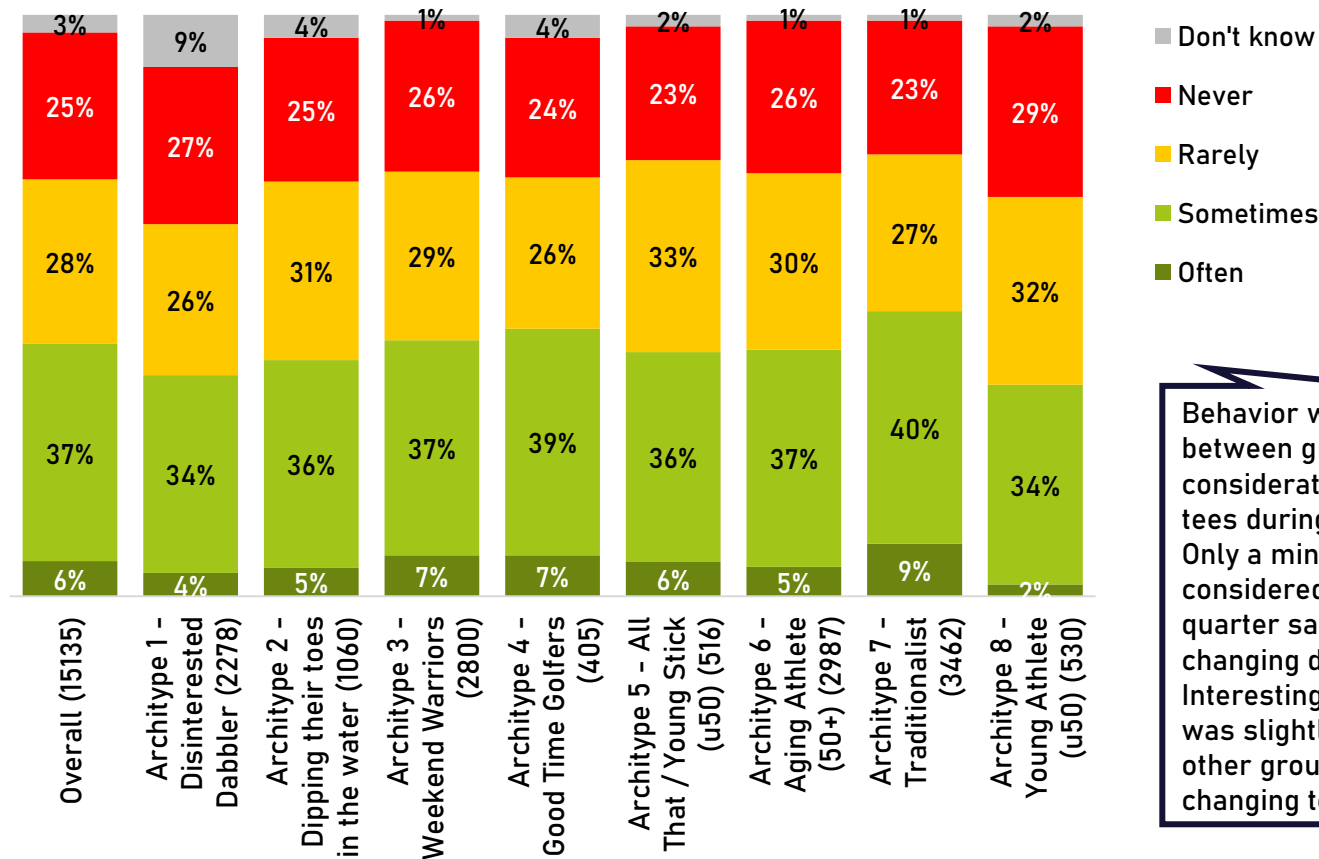
■ Yes - definitely
 ■ Yes - maybe
 ■ No
 ■ Don't know



Base numbers shown in brackets

TEE ATTITUDES | Playing different tees during a round

Q. Have you ever considered playing tees from different sets of markers during your round (e.g., moving forward or back on a particular hole) based on your preference, playing ability or weather conditions (not including playing a specified combination tee course)?



Behavior was fairly consistent between groups when asked about consideration of playing different tees during a round. Only a minority said they often considered doing this, while around a quarter said they never considered changing during a round. Interestingly, the Traditionalist group was slightly more likely than the other groups to have considered changing tees during a round.

Base numbers shown in brackets

TEE ATTITUDES | Why have never considered changing tees?

Q. Why have you never considered playing tees from different sets of markers during your round?

ASKED ONLY TO THOSE WHO HAVE NEVER CONSIDERED PLAYING FROM DIFFERENT SETS OF MARKETS DURING THEIR ROUND

KEY THEMES

- Concerns around handicap and posting scores
- A preference to “stick with what was chosen”
- Maintaining consistency throughout the round
- Considerations around slope and rating
- It had just never been considered
- That’s “not how you play”
- It feels unfair or like cheating
- It’s not in the Rules
- Not a long hitter or play the forward tees anyway

Concerns around posting scores and a desire for consistency across the entire round were important reasons for never considering changing tees.

Several mentioned that changing tees during a round was an affront to the Rules of Golf!



TEE ATTITUDES | Why have not considered changing tees?

Q. Why have you never considered playing tees from different sets of markers during your round?

ASKED ONLY TO THOSE WHO HAVE NEVER CONSIDERED PLAYING FROM DIFFERENT SETS OF MARKERS DURING THEIR ROUND

That's not how we play.

Because it defies everything about the game of golf. From rules to cheating only yourself...

No, as it changes the course rating/slope and your handicap score is not accurate. I feel if you start on a particular set of tees, you should use that set for the entire round.

Have always finished a round from the tees I started - never considered another option.

I usually play in tournaments and playing from different tees during the round can cost you penalty strokes. When I play not in tournaments I adjust which club I use, and not the tees.

I would invalidate my score for entering for handicap.

Once I decide what tees to play from I finish the round playing from those tees. If necessary I would chose a different set of tees on my next round at that course.

Probably just thinking inside the box. Also for posting the score for handicap purposes.

Never crossed my mind

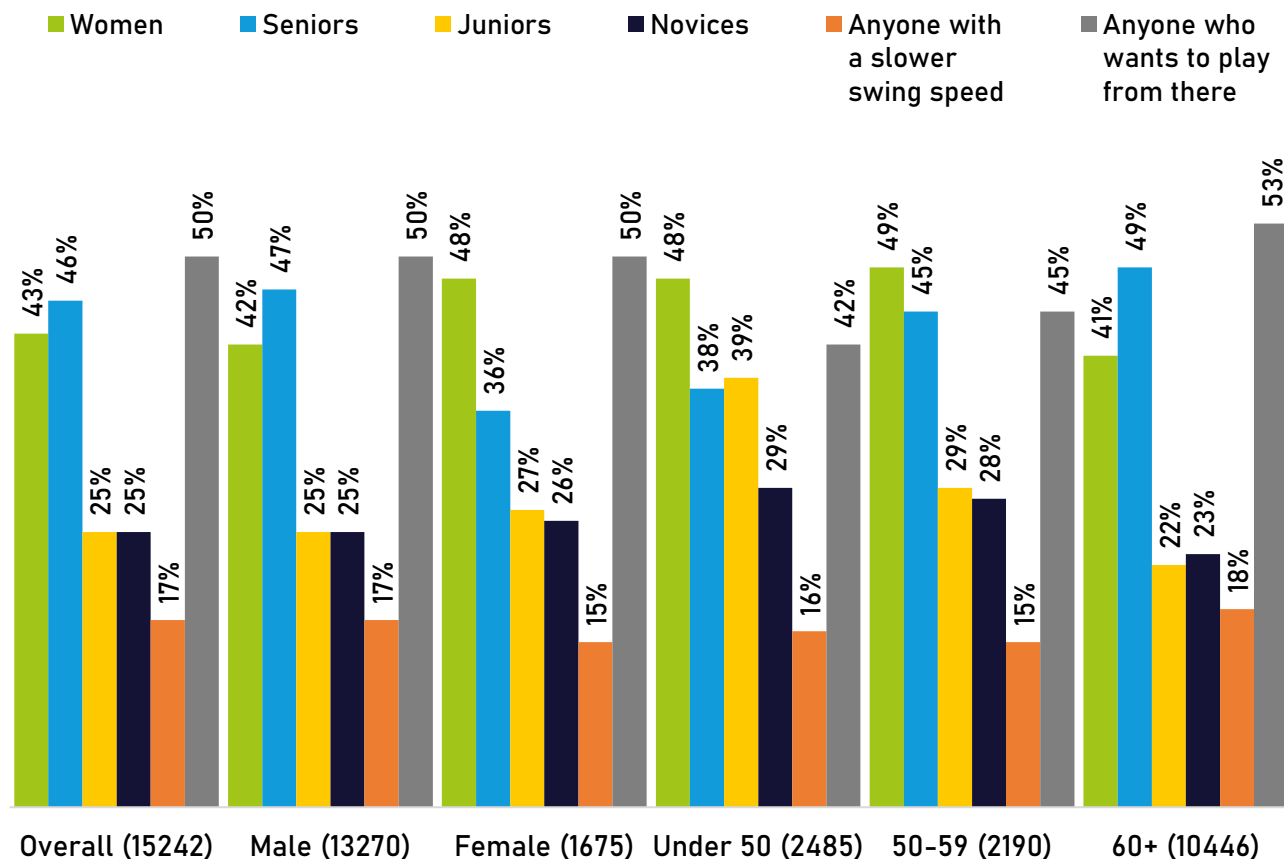
The tee indicators at the majority of courses I've played are labeled as men's, women's, and seniors.

I feel once you choose your color or set you need to stick to it because of the handicap

I prefer to keep my shot managed per the same tee boxes for each round. I do change per round depending on my hitting ability.

TEE ATTITUDES | Who are the forward tees meant for?

Q. What kind of golfer do you believe the forward tees are meant for?



The general view was that the forward tees are meant for anyone who wants to play there, for seniors and for women. Women and senior golfers shared the same view.

Base numbers shown in brackets

TEE ATTITUDES | Why?

Q. Please explain a bit about the reasons for your opinion:

Too much reliance on traditional "women's" tees as a stigma for male golfers.

I believe people should play the tee that is equal to their playing ability. Too many people try to play from a tee they don't belong which usually slows down play.

Could be novices, women, or seniors. Depends on the course.

I'm a man so I don't consider the women's and juniors tees. Usually the next set back are for seniors and the 3rd set back are also for lower handicap seniors.

Tees are typically named something like champions, standard, seniors, and women, which is unfortunate. I'd prefer golfers to think about tee positions more according to their abilities than an arbitrary category they feel placed into. I would also like to see handicaps accommodate golfers' scoring by playing from different tee lengths on different holes, according to the individual golfer's preference. I think this would enhance enjoyment of the game and speed up play. Varying tee selection also provides a learning opportunity by changing a player's perspective on any given hole. I'd also like to see another set of tees that convert every hole to a par 3 for golfers who prefer a shorter course or faster play.

The "names" are meaningless. Golfers should play whatever tee they are comfortable with, but never the longest if they are novices, poor drivers, etc.

Old school guy. Ladies' tees in front.

That is what I was taught as a kid.

Other than the women's tees forward tees are meant for seniors due to limits on distance abilities.

To classify a set of tees as 'women', 'seniors' is to stigmatize that set of tees. It is a very common occurrence amongst older male golfers who would benefit from playing more forward tees improving their scores who have to be macho and play the tees they always have while their game is leaving them. I don't like the stigmatizing.

Doesn't matter where you play from. Enjoy the game.

I am a believer in "ready" golf. Players should play from the appropriate tee matched to their skill level. Forget ego-men!!!

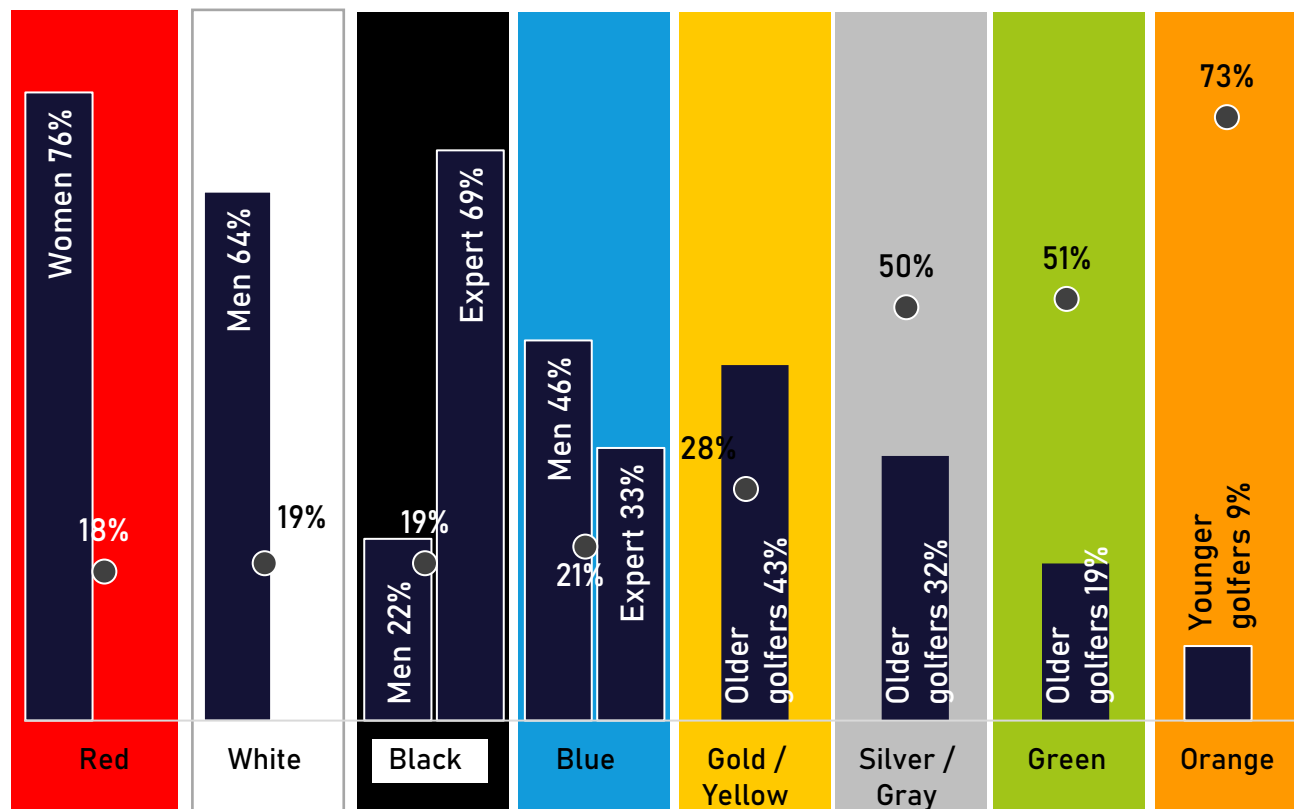
That's where women play from and most men won't tee from them, for whatever reason.

TEE ATTITUDES | Tee color association

Q. Do you associate certain tee colors with particular groups of golfers?

MOST PROMINENT ASSOCIATION(S) AND 'DON'T ASSOCIATE' ARE SHOWN

● None of these / Don't associate



There were some strong associations between tee color and golfer type – especially that the red tees were for women, the white tees for men and the black tees for expert golfers. Orange, green and silver / gray tee markers were not associated with any particular groups by over half of golfers.

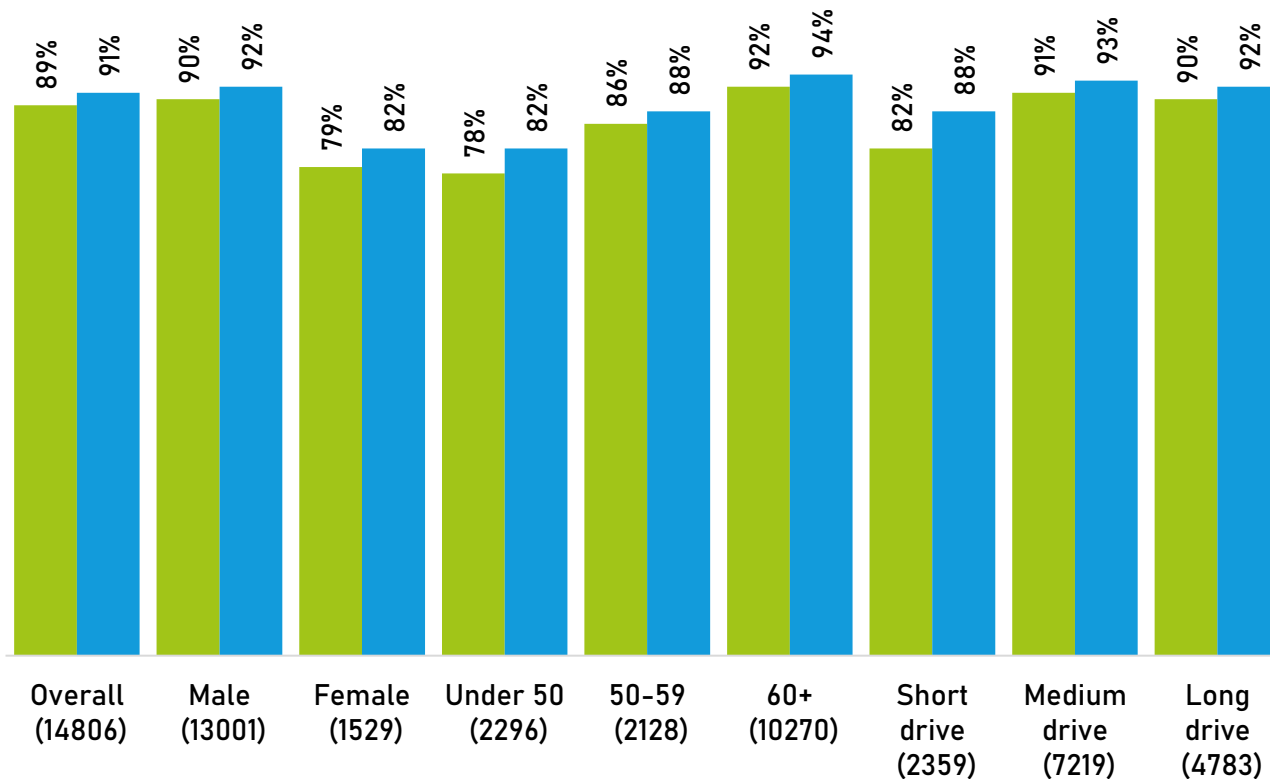
Base: 12763 - 14466

TEE ATTITUDES | Key metrics – impact on shots

Q. Below follows a series of short questions about tee selection, please choose 'yes' or 'no' for each one.

'YES'
RESPONSES
ARE SHOWN

- Tee choice typically allows shots to reach the vicinity of the green
- Tee choice allows a variety of clubs on approach shots



For the majority, the opinion was that their selection of tees allowed them to reach the vicinity of the green and allowed a variety of clubs to be used on approach shots.

Base numbers shown in brackets

TEE ATTITUDES | Key metrics – role of course staff

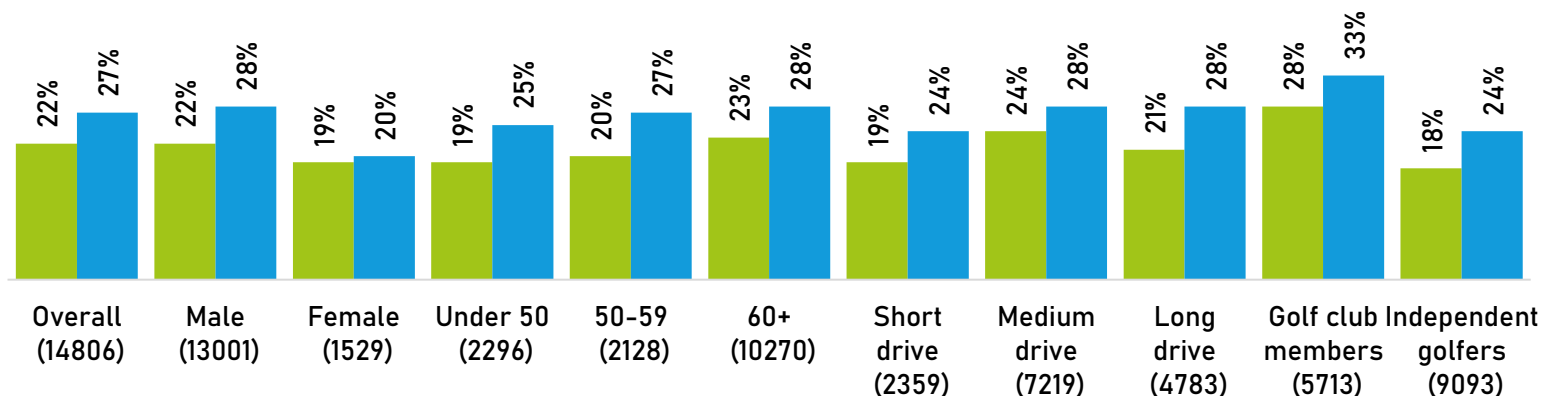
Q. Below follows a series of short questions about tee selection, please choose 'yes' or 'no' for each one.

'YES'
RESPONSES
ARE SHOWN

■ Ask golf course staff for teeing recommendations

■ Golf course staff offer teeing recommendations

The majority did not ask for or receive recommendations on tee selection from golf course staff. Possibly because of a higher level of familiarity and trust of their main facility, golf club members were most likely to receive recommendations, probably although they were still less likely to ask for than to be offered by course staff.



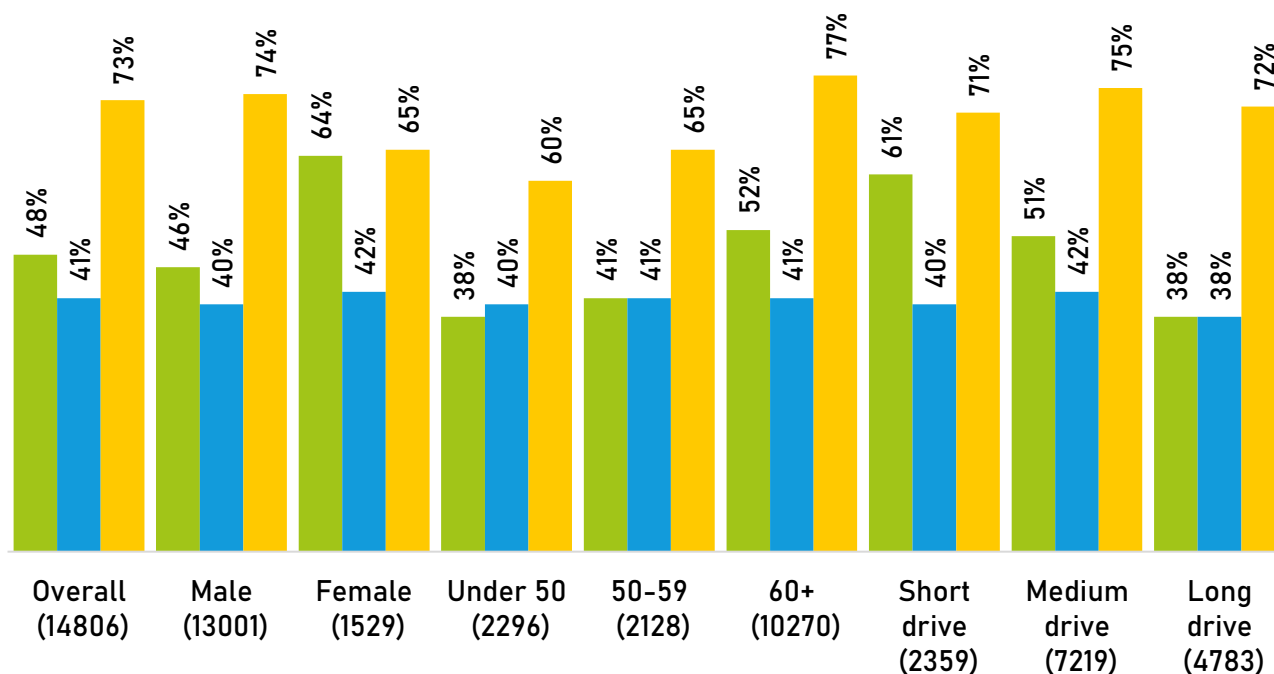
Base numbers shown in brackets

TEE ATTITUDES | Key metrics – tee naming

Q. Below follows a series of short questions about tee selection, please choose 'yes' or 'no' for each one.

'YES'
RESPONSES
ARE SHOWN

- Would play tees with names they do not identify with
- Tee selection would be influenced by rating for gender
- Golfers should be able to post scores from any tee



Interestingly, nearly three quarters of golfers said they should be able to post scores from any tee, but just under half said they would actually play tees with names they didn't identify with.

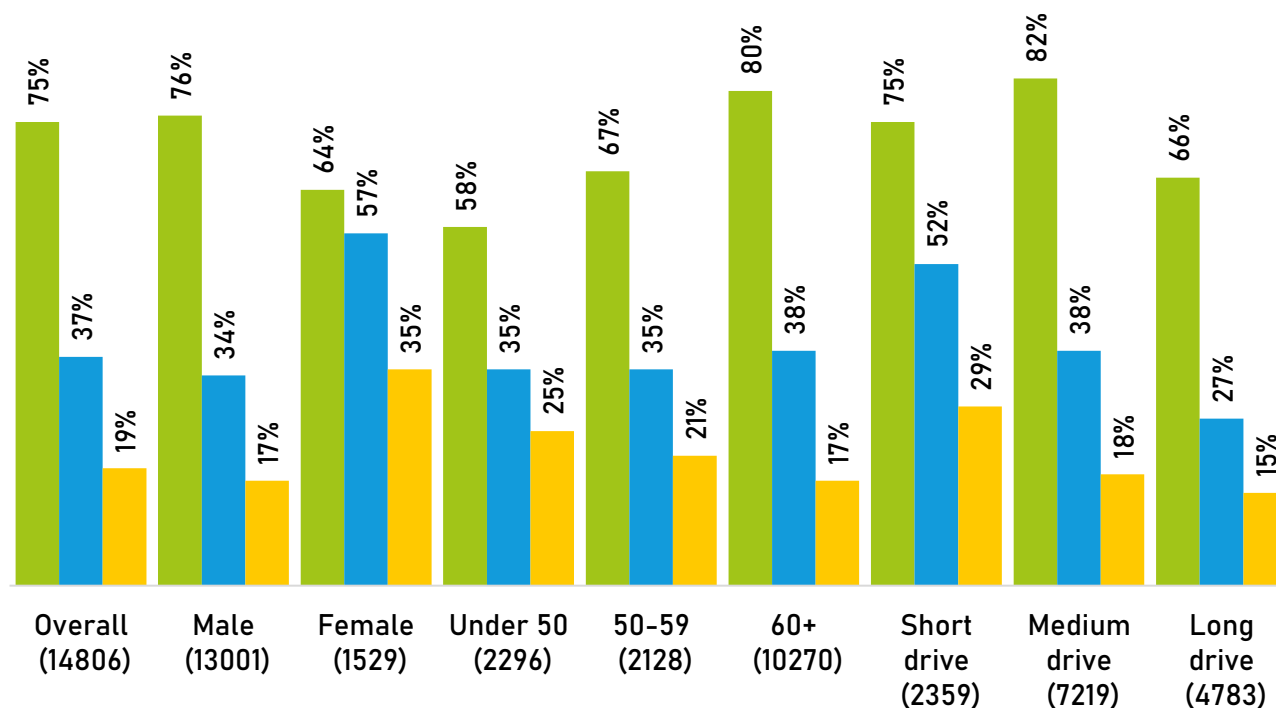
Base numbers shown in brackets

TEE ATTITUDES | Key metrics – course length preference (i)

Q. Below follows a series of short questions about tee selection, please choose 'yes' or 'no' for each one.

'YES'
RESPONSES
ARE SHOWN

- Would play a set of tees less than 6,000 yards
- Would play a set of tees less than 5,000 yards
- Would play a set of tees less than 4,000 yards



Just 17% of male golfers and 35% of female golfers said they would play a set of tees less than 4,000 yd.

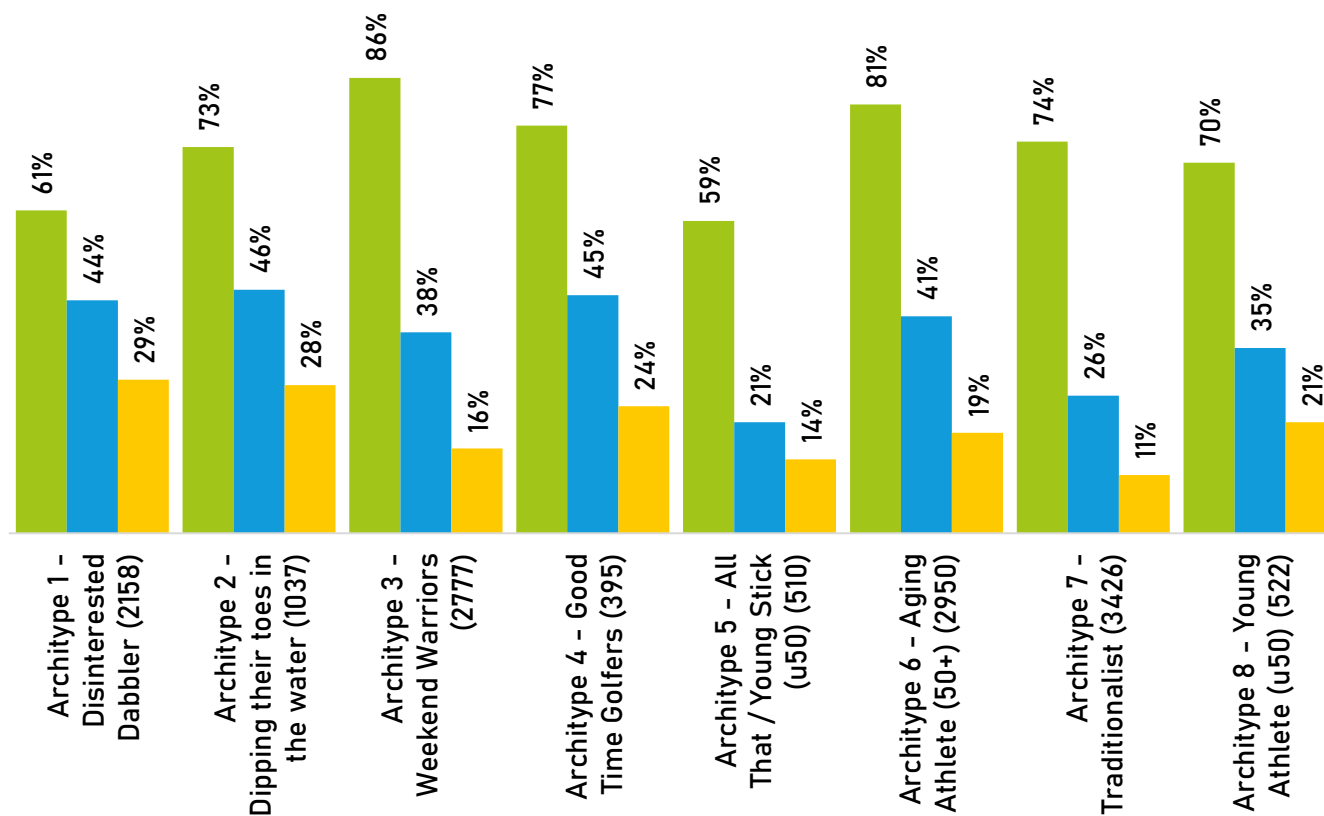
Base numbers shown in brackets

TEE ATTITUDES | Key metrics – course length preference (ii)

Q. Below follows a series of short questions about tee selection, please choose 'yes' or 'no' for each one.

'YES'
RESPONSES
ARE SHOWN

- Would play a set of tees less than 6,000 yards
- Would play a set of tees less than 5,000 yards
- Would play a set of tees less than 4,000 yards

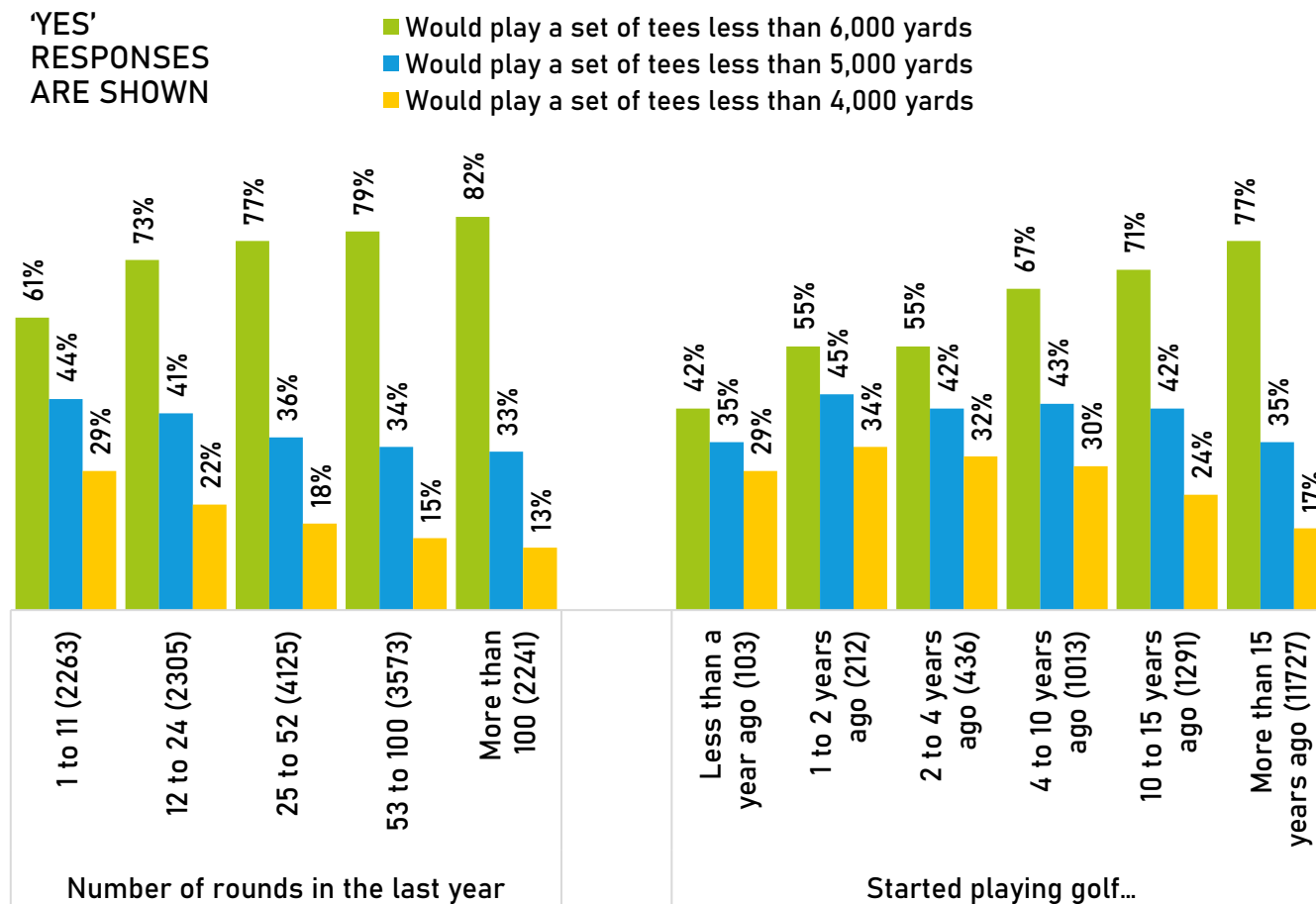


The young, low handicappers in the All That / Young Stick were least likely to say that they would play a set of tees at 6,000 yd., 5,000 yd., or 4,000 yd.

Base numbers shown in brackets

TEE ATTITUDES | Key metrics – course length preference (iii)

Q. Below follows a series of short questions about tee selection, please choose 'yes' or 'no' for each one.

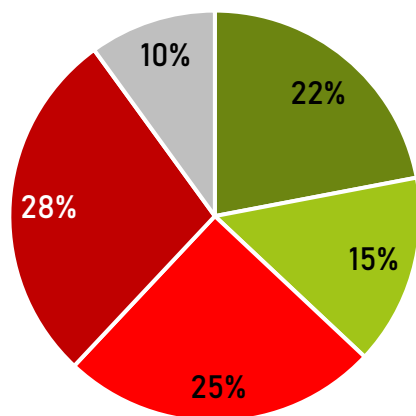


Better-established and more regular golfers were more likely to say that they would play a set of tees less than 6,000 yd. Newer and less regular golfers were happier to play shorter length tee sets.

Base numbers shown in brackets

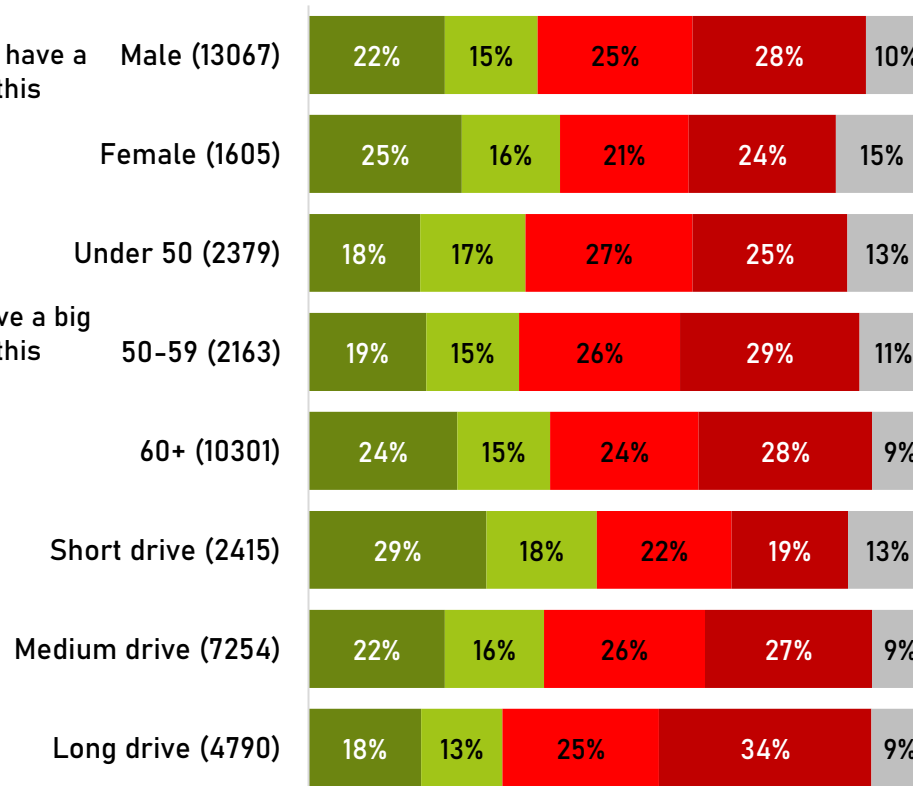
TEE ATTITUDES | Playing from a tee in the fairway

Q. How would you feel about playing from a tee that was located in the fairway, with tee markers at ground level and no additional definition of the tee area?



Generally golfers did not want to play from basic tees in the fairway, women and shorter hitters were slightly happier to do so though.

■ 1 - I would not have a problem with this Male (13067)
 ■ 2 Female (1605)
 ■ 3 Under 50 (2379)
 ■ 4 - I would have a big problem with this 50-59 (2163)
 ■ Don't know 60+ (10301)



Base numbers shown in brackets

TEE SELECTION | Impact of a more formal teeing ground structure

Q. Would your opinion change if the teeing ground was elevated above the surrounding fairway into a more formal teeing ground structure?

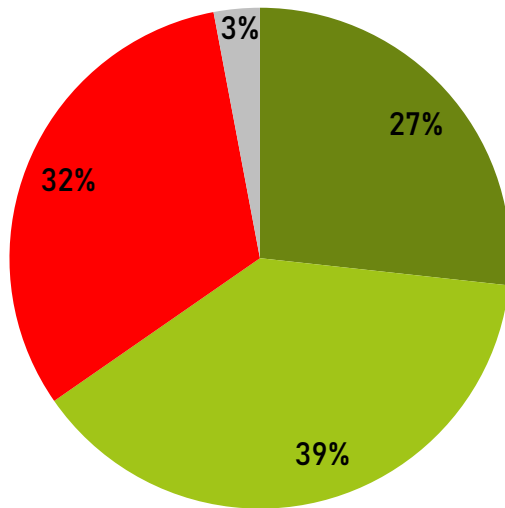
■ Yes - this would improve my opinion a lot

■ Yes - this would improve my opinion a little

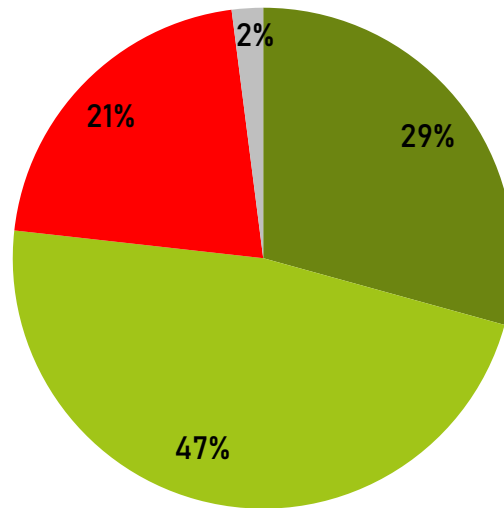
■ No - my opinion wouldn't change

■ Don't know

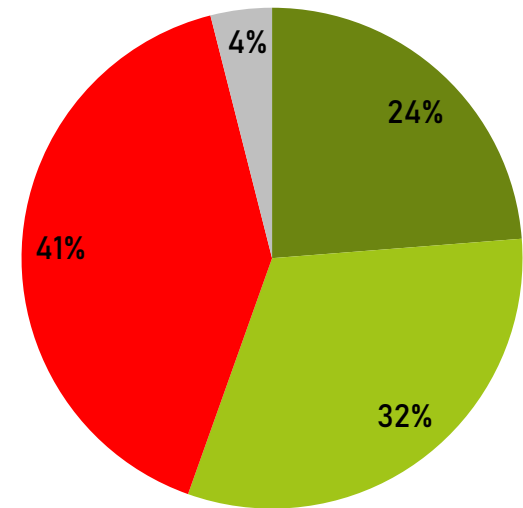
OVERALL (7800)



PREVIOUSLY HAD A PROBLEM WITH FAIRWAY TEES (3683)



PREVIOUSLY HAD A BIG PROBLEM WITH FAIRWAY TEES (4117)



For those who originally were against the idea of basic fairway tees, it would make a difference if the fairway tees were elevated and more formalized. Nearly half of those who originally had a big problem with this idea would remain negative towards it even with a more formal structure however.

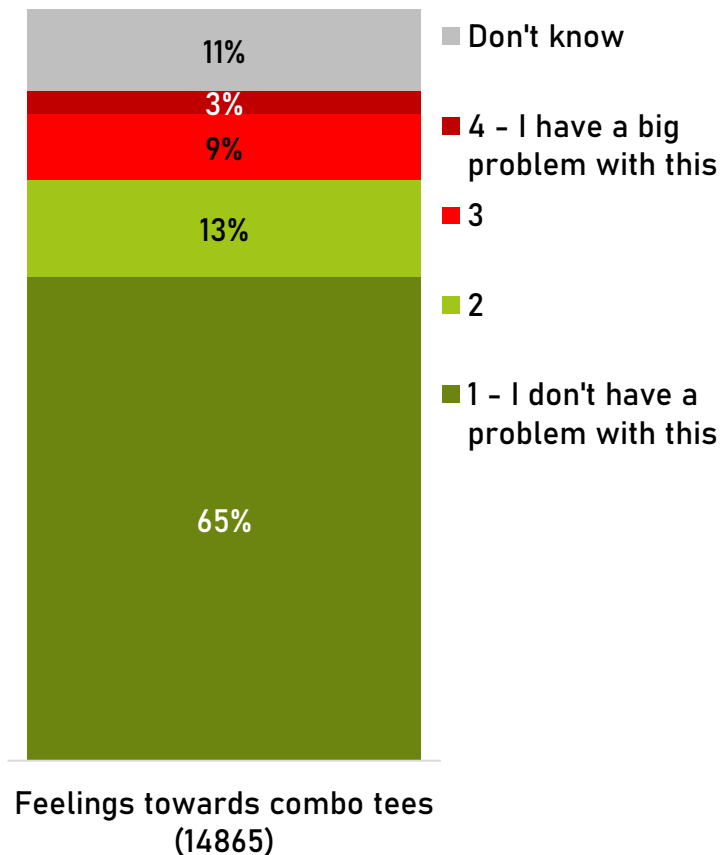
Base numbers shown in brackets

TEE ATTITUDES | Combo tees

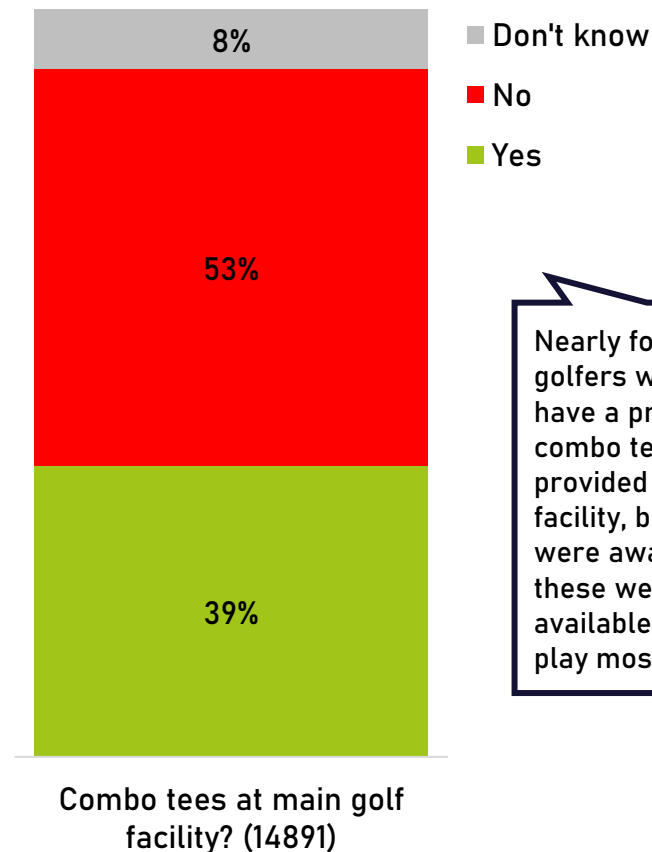
Q. How do you feel about playing a rated set of tees that is a combination of two or more sets – i.e., a “combo tee”?

Q. Does the course you play most often offer “combo tees”?

ATTITUDES TO COMBO TEES



COMBO TEES AT MAIN FACILITY?



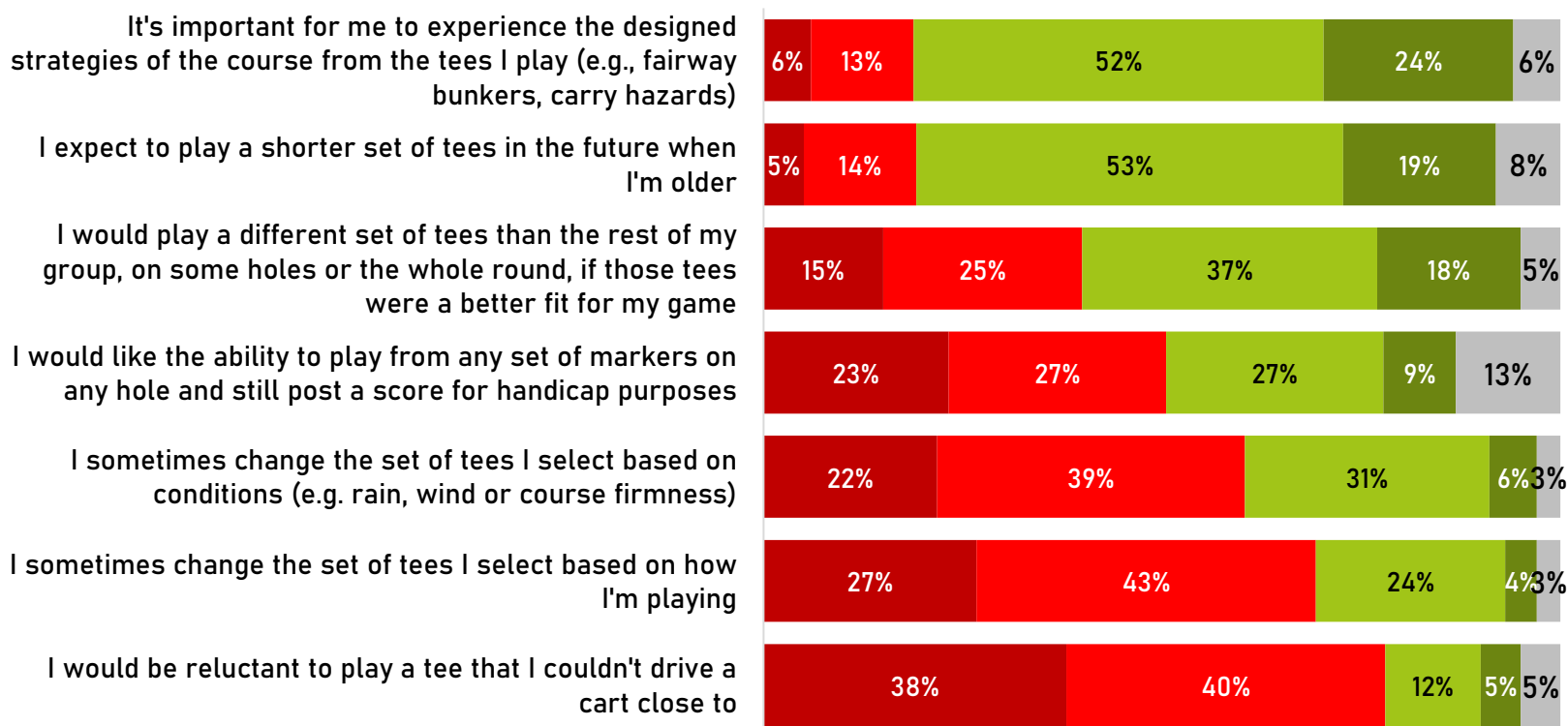
Nearly four fifths of golfers would not have a problem with combo tees being provided at their facility, but only 39% were aware that these were already available where they play most often.

Base numbers shown in brackets

TEE ATTITUDES | Tee selection behavior

Q. How much do you agree or disagree with each of these statements about tee selection?

■ Strongly disagree
 ■ Disagree
 ■ Agree
 ■ Strongly agree
 ■ Don't know

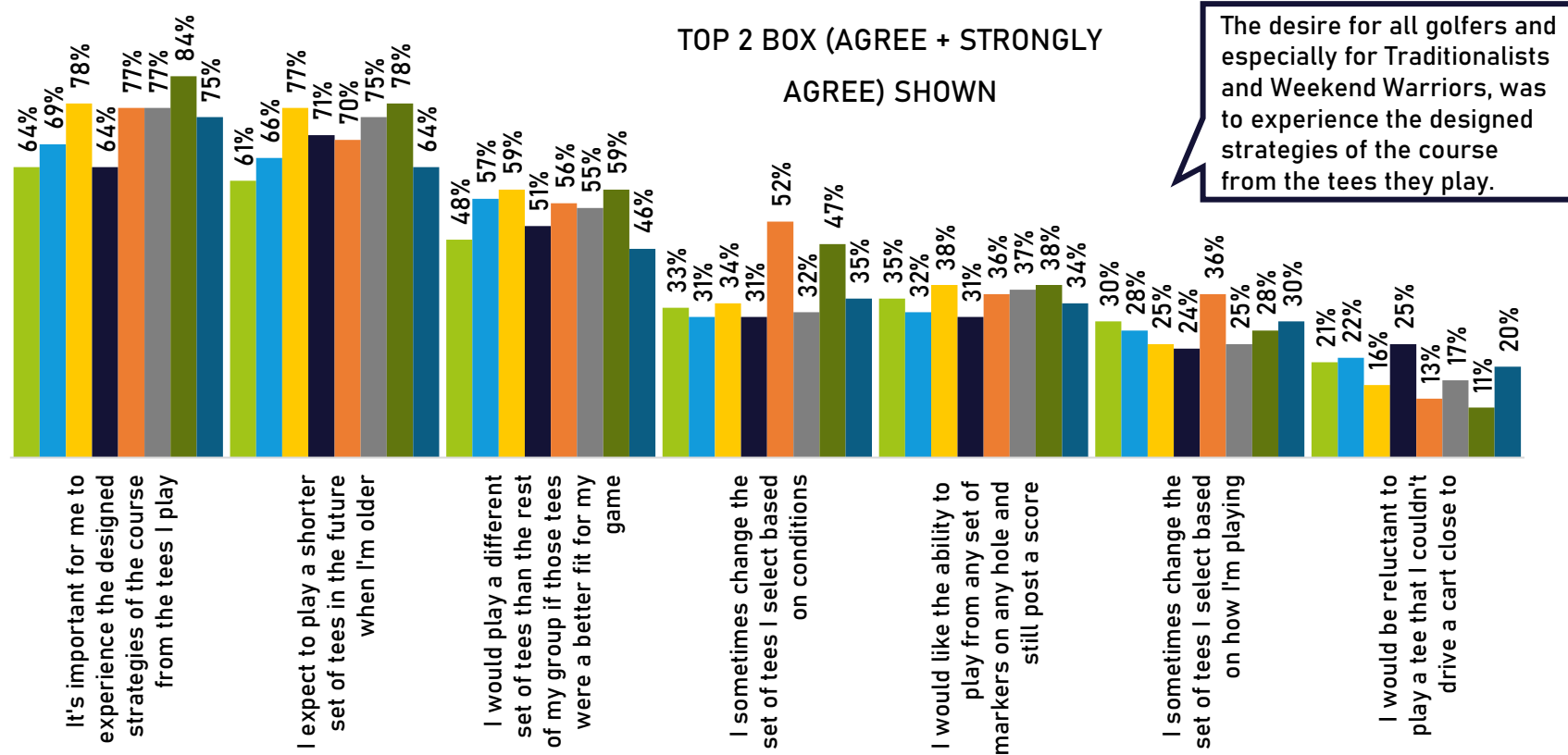


Bases from 14775-14821

TEE ATTITUDES | Tee selection behavior – by archetype

Q. How much do you agree or disagree with each of these statements about tee selection?

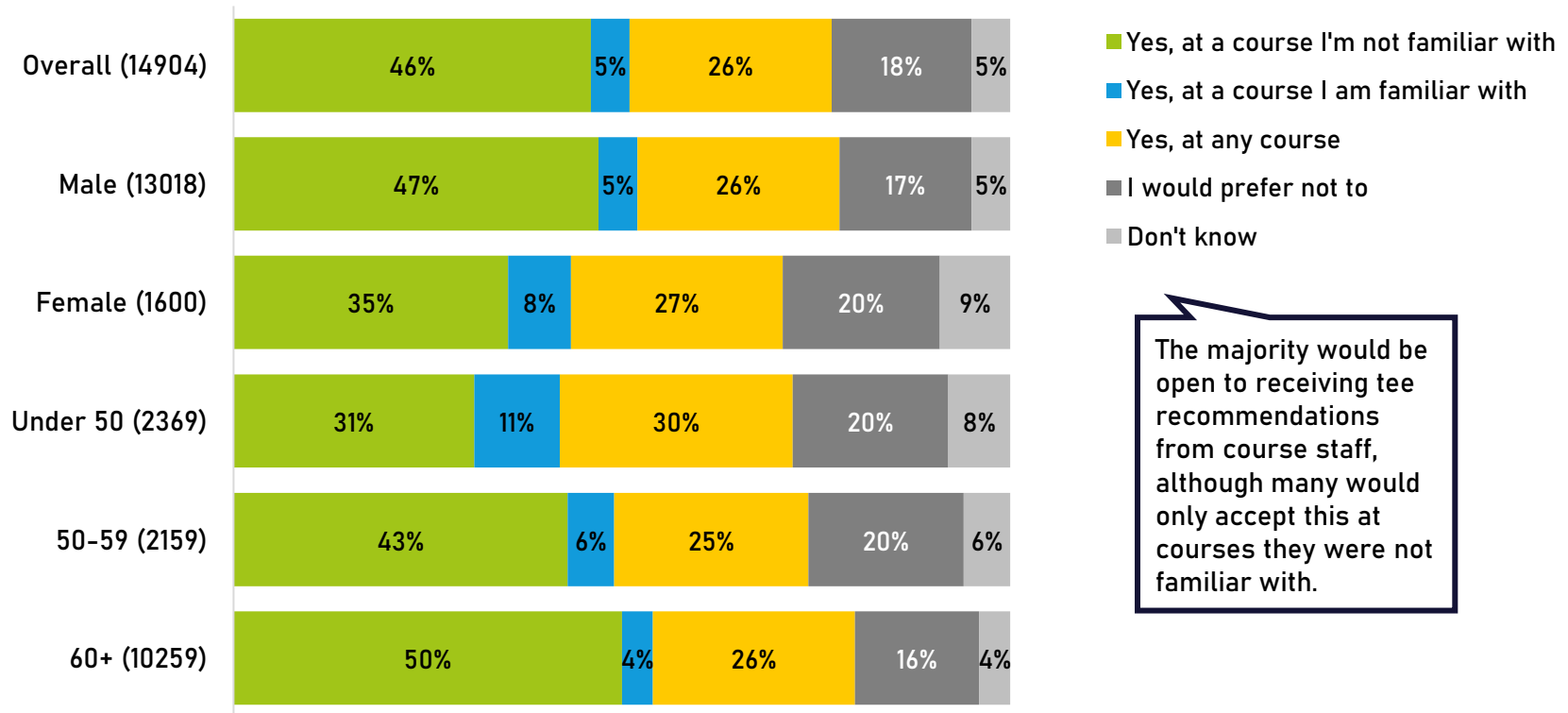
Archetype 1 - Disinterested Dabbler (2194)
 Archetype 2 - Dipping toes in the water (1033)
 Archetype 3 - Weekend Warriors (2765)
 Archetype 4 - Good Time Golfers (395)
 Archetype 5 - All That / Young Stick (504)
 Archetype 6 - Aging Athlete (2942)
 Archetype 7 - Traditionalist (3414)
 Archetype 8 - Young Athlete (521)



Base numbers shown in brackets

TEE ATTITUDES | Advice from course staff

Q. Would you be open to receiving recommendations from knowledgeable course staff for which tee to play based on your skill level or performance characteristics like driving distance?



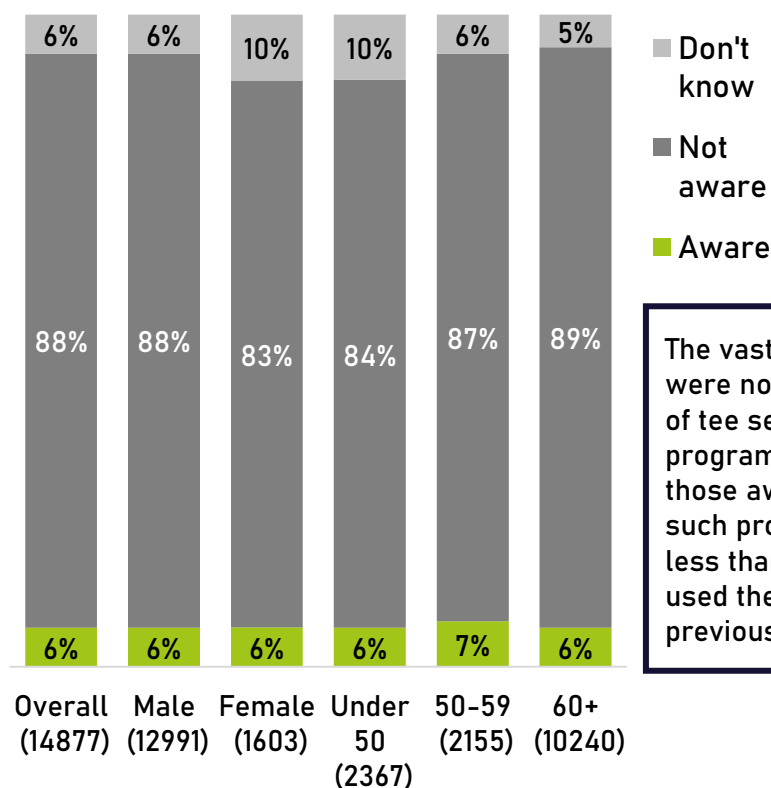
Base numbers shown in brackets

TEE ATTITUDES | Tee selection programs

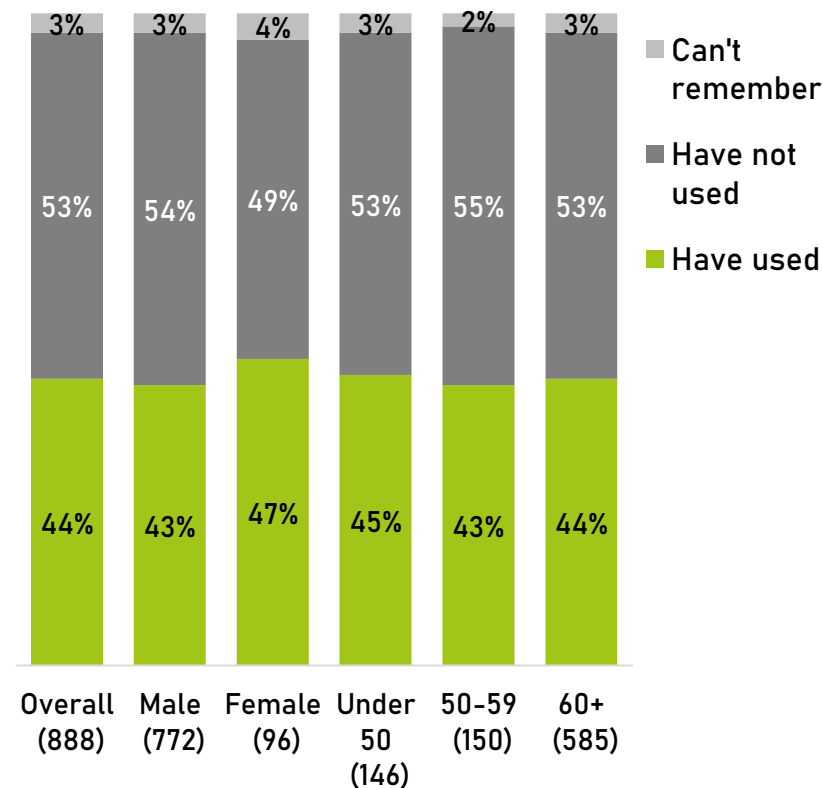
Q. Are you familiar with any tee selection programs, such as Longleaf Tee System, that connect performance information like driving distance with a recommended yardage range to suggest appropriate tees?

Q. Have you ever used one of these systems to make your teeing choice?

AWARENESS OF TEE SELECTION PROGRAMS



USE OF TEE SELECTION PROGRAMS (ONLY ASKED TO THOSE AWARE OF PROGRAMS)



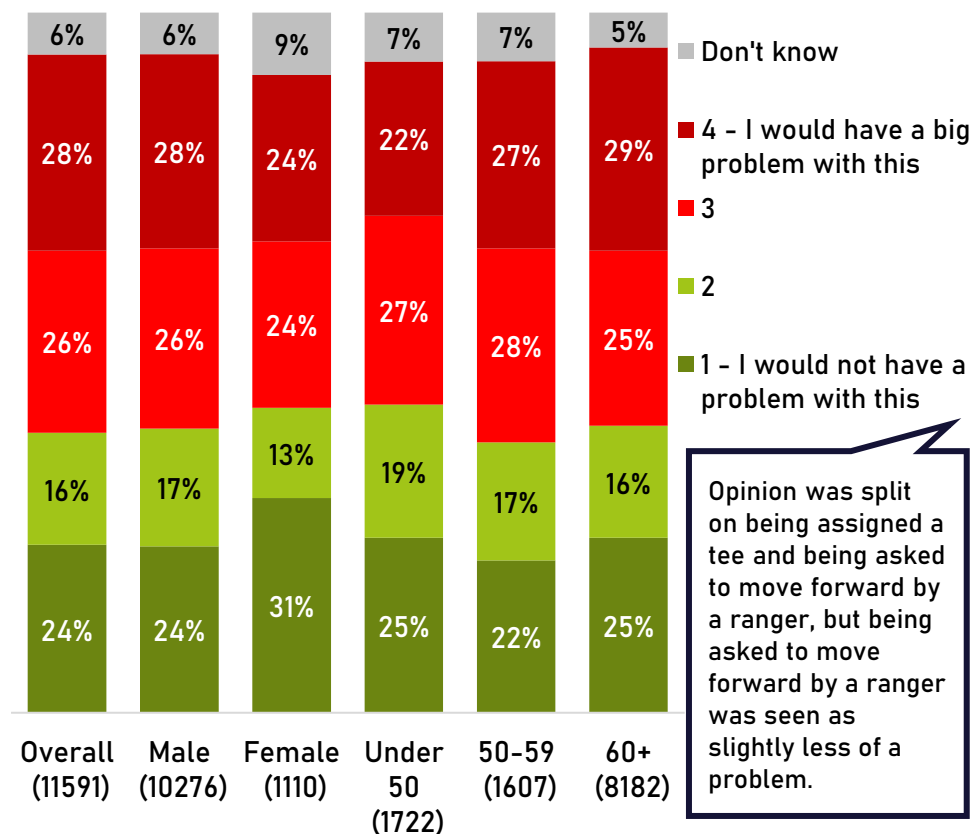
Base numbers shown in brackets

TEE ATTITUDES | Tee assignment

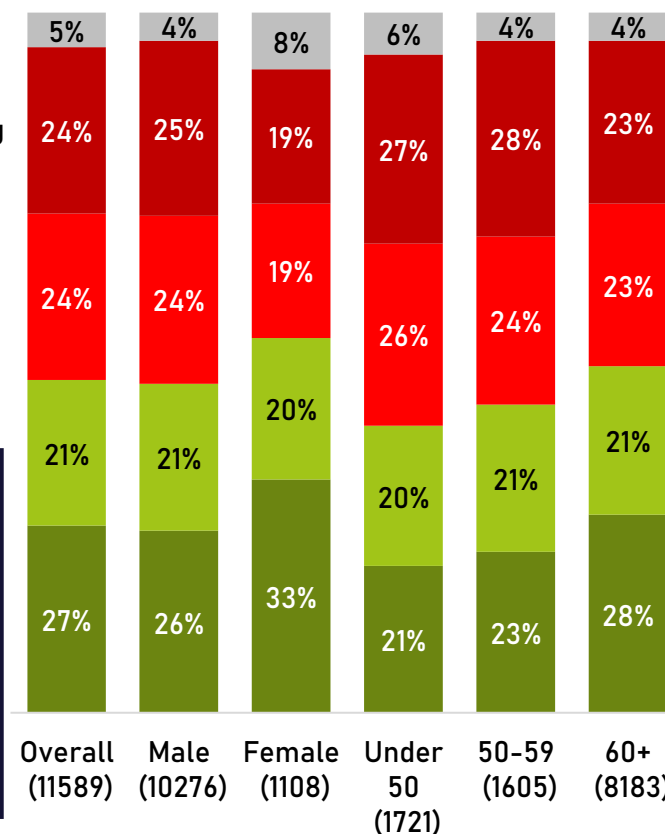
Q. How would you feel about being assigned a tee based on your skill level regardless of your preference?

Q. How would you feel about being asked by a course ranger to move forward a set of tees based on your demonstrated play or pace?

BEING ASSIGNED A TEE BASED ON SKILL LEVEL



BEING ASKED TO MOVE FORWARD BY A RANGER



Base numbers shown in brackets

CONTACT DETAILS



Sports Marketing Surveys



The Courtyard, Wisley, Surrey, GU23 6QL

www.sportsmarketingsurveys.com

+44 (0)1932 345539

JOHN BUSHELL | MANAGING DIRECTOR

john.bushell@sportsmarketingsurveysinc.com

ERICA HEALY | HEAD OF RESEARCH

erica.healy@sportsmarketingsurveys.com

VIKKI ZEILA | SENIOR SPORTS RESEARCH MANAGER

vikki.zeila@sportsmarketingsurveys.com



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