

December, 2021

Distance Insights Behavioral Research:

A COMPREHENSIVE LOOK AT TEE BOX SELECTION



Prepared by: **SPORTS&
LEISURE**
RESEARCH GROUP

Background & Objectives

A Deeper Dive into “The Why” Behind Improper Tee Selection

- Third phase to explore the behavioral and motivational side behind suboptimal decisions
 - Inhibitors and their prevalence among the eight archetype segments
 - Exploration of the Magnitude of previously surfaced attitudinal barriers
 - Ego
 - Pre-existing perceptions
 - Social Norms
 - Group Think
 - Assess the impact of other decision drivers
 - Knowledge gaps and overestimates surrounding hitting distance
 - Projections of self vs. actuality of self
 - Desire to keep all members of a foursome at the same set of tees
 - Perceptions of slow play impact
 - Perceptions of reduced social interaction



Background & Objectives

Assess Golfer Receptivity to Potential Behavioral Modifiers



Introduction of Decision Aids Driven by Ability and Course Conditions



Consideration of Revised Social Constructs



Incorporation of Supporting Points to Induce Change



Data and Empirically Driven Decision Drivers



Emotional Appeal

Methodological Overview

TWO INITIAL QUALITATIVE PHASES

1. ONSITE OBSERVATION AND INTERACTION—OCTOBER 2021

- Three Distinct Facility Scenarios
 - 54 Hole Resort Facility---Florida
 - Private Club---Texas
 - 36 Hole Municipal/Public Complex—Southern California
- Multiple Touchpoints
 - Behavioral Observation of 15-20 foursomes per market at the first tee
 - Pre and post round depth interviews
 - In depth and in the moment ethnography with starters



Methodological Overview

TWO INITIAL QUALITATIVE PHASES

2. ZOOM ENABLED NATIONAL DEPTH INTERVIEWS—OCTOBER TO NOVEMBER 2021

- 16 starters across facility types
- 22 Golfers distributed across each of the previously defined golfer archetypes:

DD Disinterested Dabblers

S Sticks/She's All That

DT Dipping their Toes

T Traditionalists

WW Weekend Warriors

YA Young Athletes

GT Good Timers

AA Aging Athletes

Methodological Overview

FOLLOW UP QUANTITATIVE RESEARCH

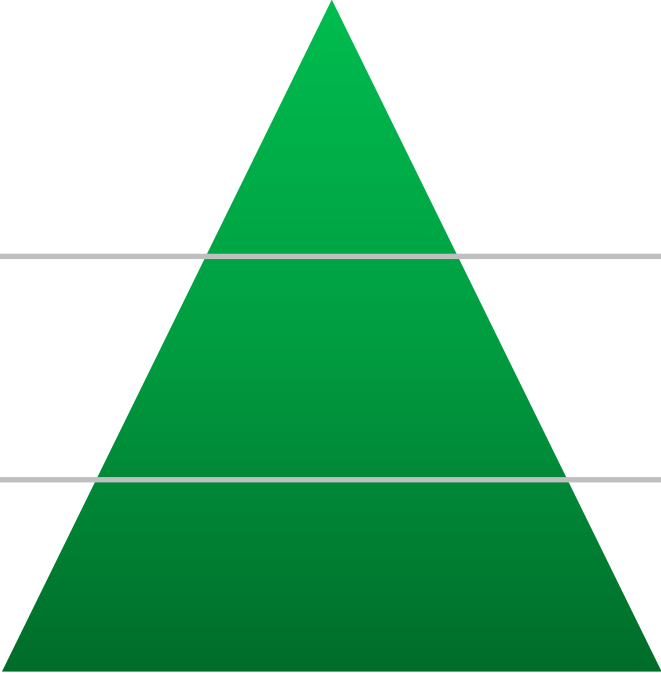
ONLINE 20 MINUTE SURVEY—NOVEMBER 2021

- N= 420 respondents
 - Minimum N=50 for each of the eight archetype segments
- Test Exposure to three concepts developed for initial qualitative phase
 - Resonance
 - Potential Adoption



Two Minute Take-Aways

Foundational Inhibitors to Ability Based Tee Selection are Ingrained and Instinctive

- 
- Ego
 - Peer pressure
 - Creatures of habit
-
- Gender/Age Stigmas
 - Overestimated Ability
-
- Lack of “Enlightenment”
 - Lack of Options

- Both Athlete archetypes and the more engaged Traditionalists and Sticks are reticent to deviate from norms and perceived “expectations”
- Less engaged/committed segments follow the crowd or don’t know better

Two Minute Take-Aways

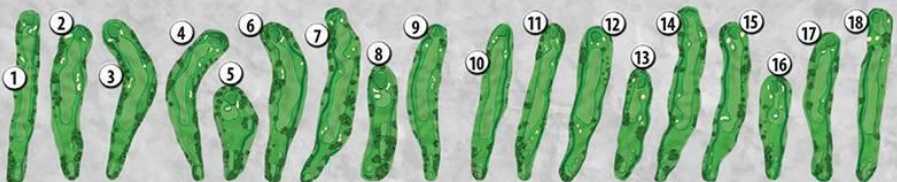
Starters are More Universal in their Observations and Acknowledgement of “The Problem”



- Ubiquitous recognition of rampant improper tee box selection
- Constrained to act:
 - Focused on maintaining tee time intervals/keeping things moving
 - Inhibited by a “Customer is always right” philosophy superseding all else

Two Minute Take-Aways

The Potential To Shift Behavior By Introducing Ability Into The Decision Mix



Hole	Men's	Women's	1	2	3	4	5	6	7	8	9	Out	10	11	12	13	14	15	16	17	18	In	Tot	Hcp	Net
Back	0-14	0-3	530	326	376	364	166	322	507	185	420	3196	451	424	348	213	519	387	220	349	448	3359	6555		
Middle	15-24	4-10	515	315	365	348	153	311	502	150	387	3046	442	418	333	204	511	369	215	299	431	3222	6268		
Silver	25-32	11-20	492	315	291	300	135	311	439	132	365	2780	415	353	333	181	473	346	180	299	414	2994	5774		
Handicap			3	11	9	7	15	13	6	17	5		2	8	16	10	12	14	4	18	1				
+/-																									
Par			5	4	4	4	3	4	5	3	4	36	4	4	4	3	5	4	3	4	4/5	35/36	71/72		
+/-																									
Forward	33+	21+	446	262	291	263	108	273	439	102	321	2505	368	353	319	163	449	319	144	282	414	2811	5316		
Handicap			3	11	7	5	15	13	1	17	9		2	4	16	10	6	12	8	18	14				
Course Ratings: Men's Blue = 71.6/129 • Men's White = 69.9/124 • Silver = Men's 67.9/118 Women's 74.5/132 • Women's Red = 71.4/126																									
Date:	Scorer:					Attest:																			

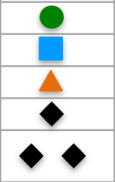
- Dichotomous Perspectives on the proper criteria suggests a combination of two measures:
 - Handicap/Average Score
 - Driving Distance
- Knowledge gaps and grandstanding for each criteria should be navigated around

Two Minute Take-Aways

Towards A Solution: A USGA Branded “No Name Lakes” Concept/ Launch Monitor Enabled “Recommendation”

- Objectivity and credibility meet the sizzle of technological innovation

“No-name Lakes” Golf Course



This Course is categorized as a Difficulty Level 3 / Moderate (Orange Triangle) by the USGA Course Rating System

A Level 3 / Moderate, Orange Triangle Course has an average number of obstacles with normal difficulty. It is characterized by standard fairways, rough, hazards and overall challenges with occasional forced carries. It is mostly enjoyed by golfers of at least intermediate skill level who normally score less than 30 over par.

Average Hitting Distance			Longest Forced Carry	Tee	Type	Effective Playing Length
Driver (yards)	7-iron (yards)	PW (yards)	(yards)			(yards)
125	80	55	60	5	Physical	4000
150	100	70	60	4.5	Blended	4400
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How to use this chart:

- 1) Measure (or estimate) your hitting distance for Driver, 7-iron and Pitching Wedge with a launch monitor or on a well calibrated driving range.
- 2) Locate the row most closely matching with your personal average hitting distances for all three clubs.
- 3) Make sure you are comfortable with the longest forced carry for that tee. If not, move up until comfortable.
- 4) Read across to find the recommended tee and type as well as the Effective Playing Length for that tee. Note that it will be different than the exact scorecard length for that tee because it accounts for doglegs, elevation change, forced layups and altitude.
- 5) Use the difficulty level of the course you play most often as a reference point. If you normally play a more difficult course, consider playing a longer course than you normally play. Conversely, if you normally play an easier course, consider playing a shorter course than recommended.



Two Minute Take-Aways

Social Concepts Towards Multiple Tee Box Selection Draw Mixed Reviews (Concept 2)



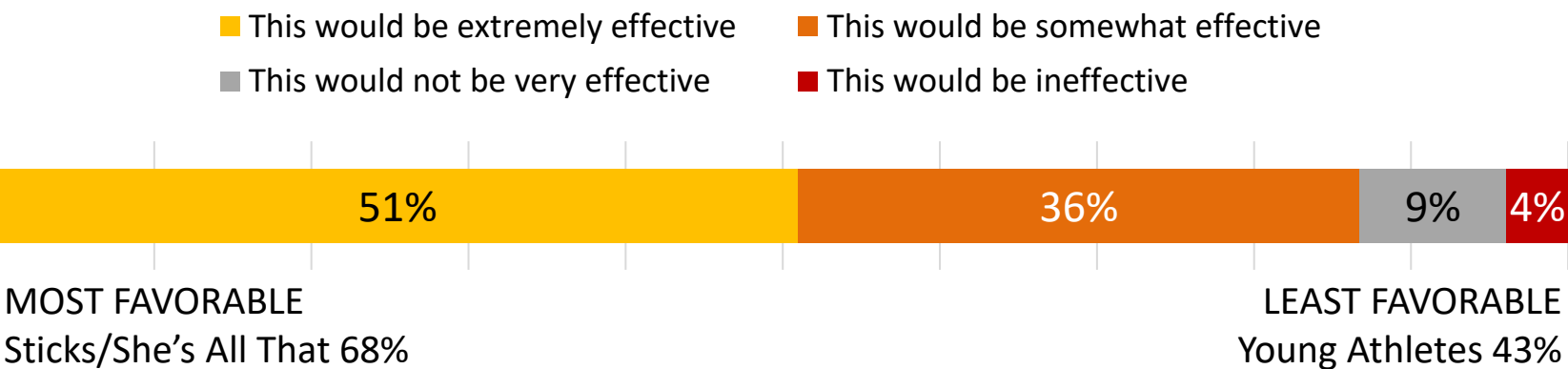
- Perceived barriers will be difficult to get past
 - Slow Play
 - Reduced Interaction
 - Inequity
 - Awkwardness

Two Minute Take-Aways

Potential Speaking Points Also Lack a “Breakthrough” Message (Concept 3)

- Empirical data on the impact of proper tee selection has greatest resonance

Sharing data that demonstrates how playing the right set of tees improves one's pace of play, improves scores and provides more fun/birdie opportunities



Distance Insights Behavioral Research:

A COMPREHENSIVE LOOK AT TEE BOX SELECTION

Findings



15 Par
5
• 547 • 532
• 492 • 449

Major Inhibitors of Proper Tee Selection Across Segments



- As seen before, Ego is primary, with peer pressure a related and close #2
- Ingrained stigmas remain behind gender and life stage based or color coded naming conventions:



- “Ladies tee=Red”
- “Senior tee” as a pejorative

Some may take it as a pride thing...and you don't want to be the one person playing from an up tee.—Ryan—Young athlete



ACTIONABLE IDEA

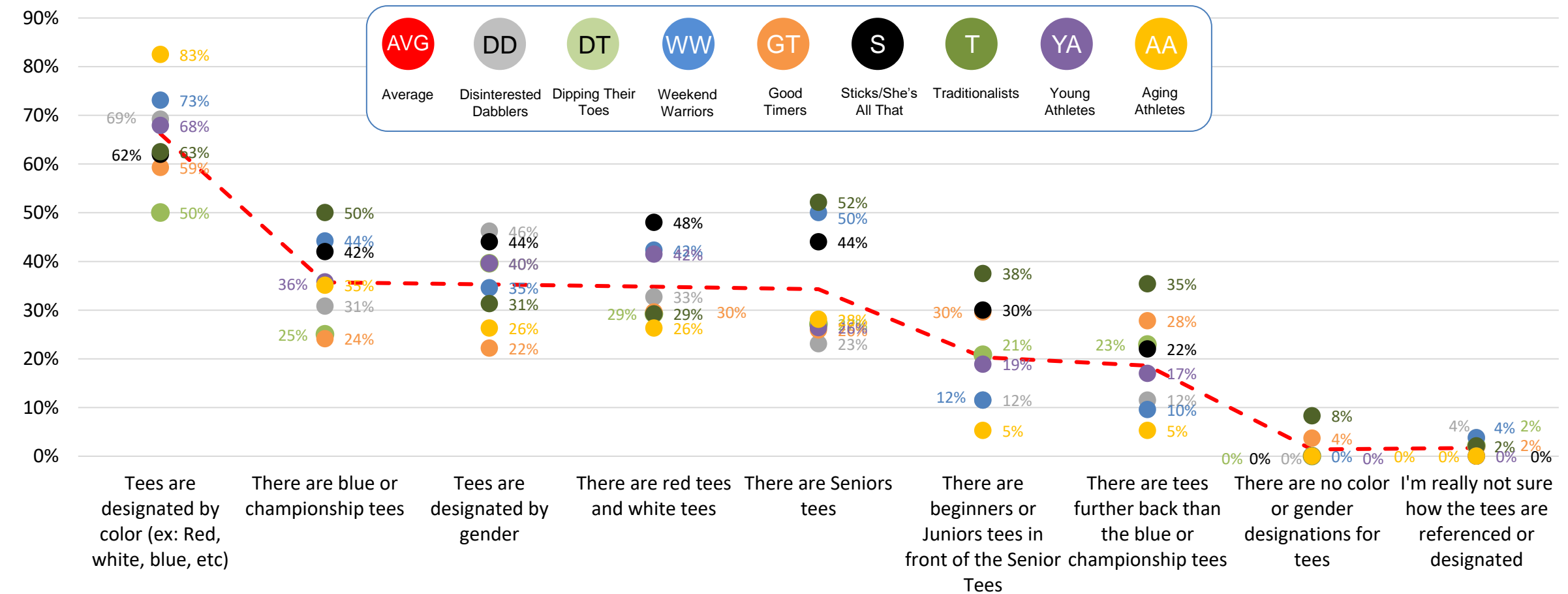
Eliminate these immovable conventions and evolve to a number system or course specific tee box names—“The Hogan tees” “The Nicklaus tees”



The Prevalence of Ingrained Naming Conventions Precludes Ability Based Tee Selection

- Less than 2% of golfers report neutral tee references

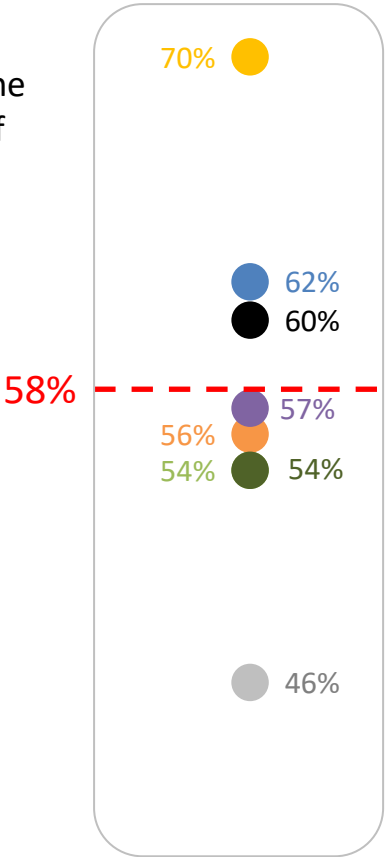
Q. Which of the following apply to the different sets of tees at the golf course where you play most often?



Golfer Attitudes Illustrate The Challenge

- A majority across segments buy into the “appropriateness” of white tees for “the average man”

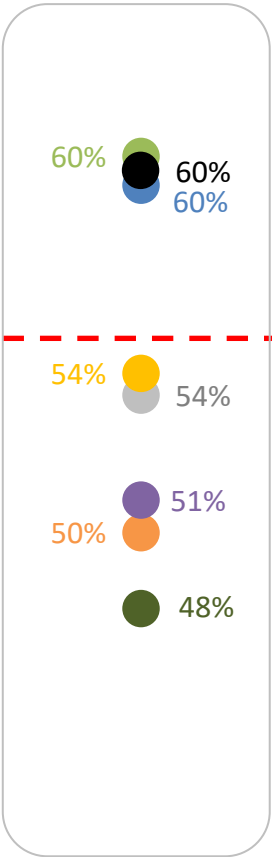
TOP 3 BOX



The “white tees” are placed in a way that enables the average man to play the golf course as it was designed to be played

- Similarly there’s a resistance to see other forward tees as age or gender

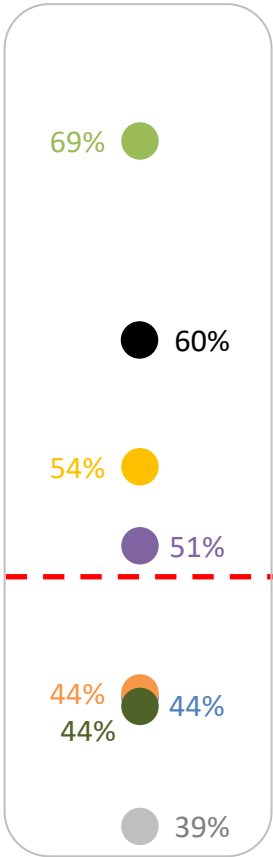
55%



I will play the senior tees when I am the proper age to play them, not before that.

TOP 3 BOX

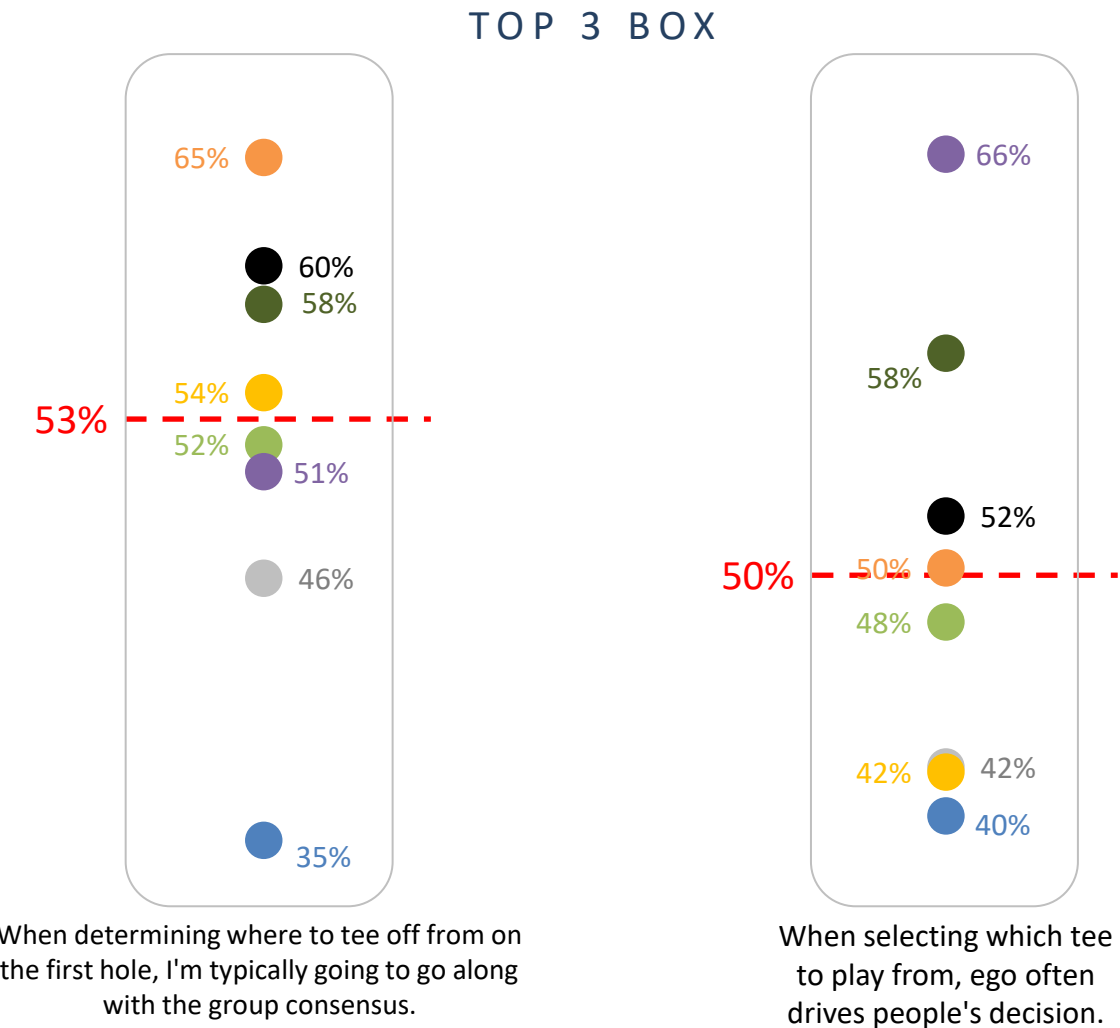
50%



The red tees are designed for women to use

Golfer Attitudes Illustrate The Challenge

- Herd mentality and reliance on conformity with others is a byproduct of both ego and expected social norms



Qualitative Illustrations Of The Challenge

When we turned 70 we moved up. It's right on without playing the ladies tee. We earned the geezer tees. It's a stigma, guys don't play from the reds.—Mike—Traditionalist



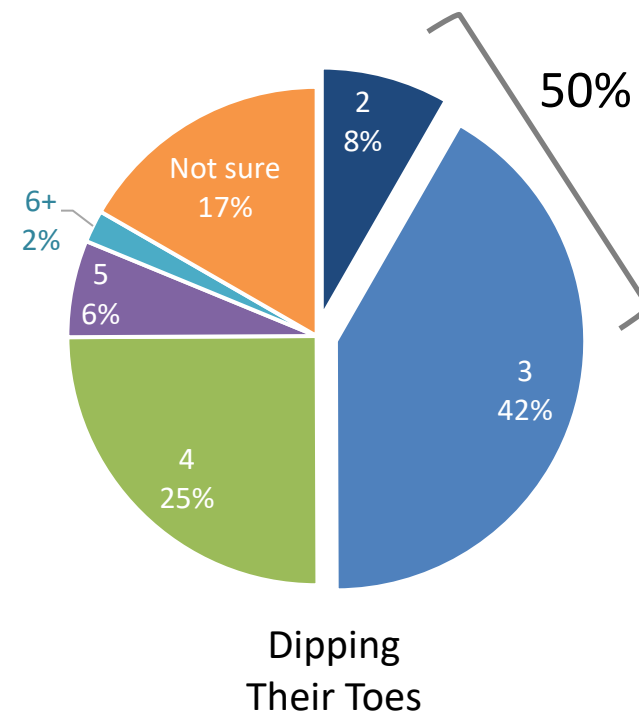
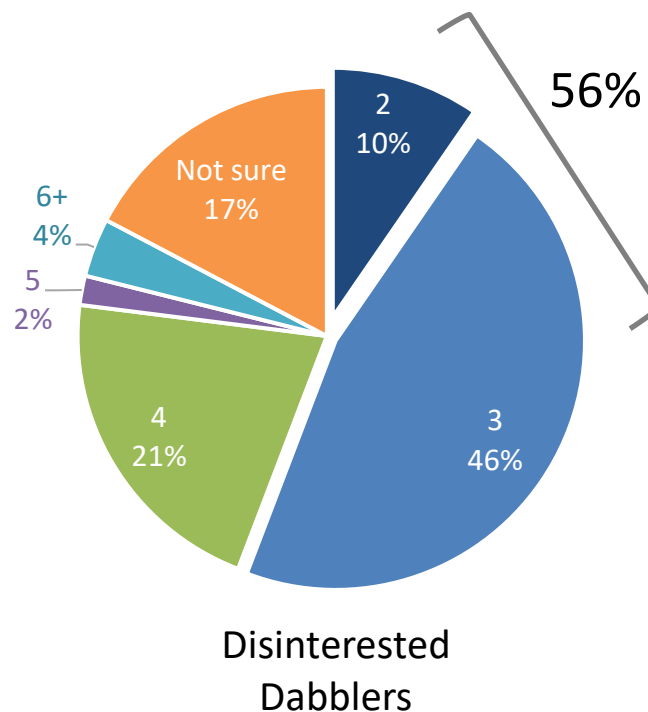
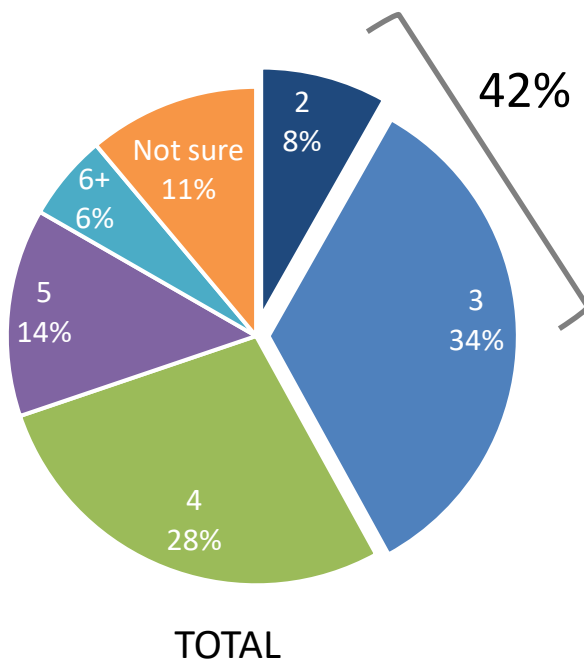
[Asked why his more experienced friends will not let him move up?] They are jerks...But I guess they think we should be the same and it does become very frustrating when you are lagging behind... Part of it is we're doing it just to hang out and have a fun day.—Oscar—Disinterested Dabbler

We observed a Resort group where a twosome, paired with a third unfamiliar player, were talked into moving up by the starter, much to the relief of the third group member who didn't want to voice his desire to move up, initially.

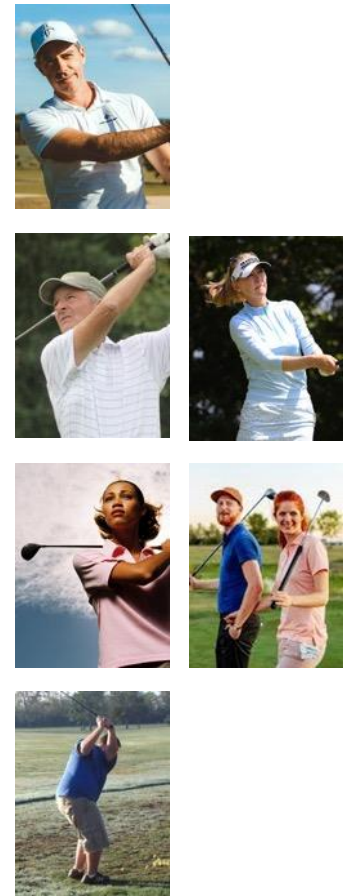
Other Inhibitors—A Lack of Options

- Some 42% typically play at courses with three or less tee boxes
 - The two least engaged/experienced segments significantly over index for three or less tee boxes

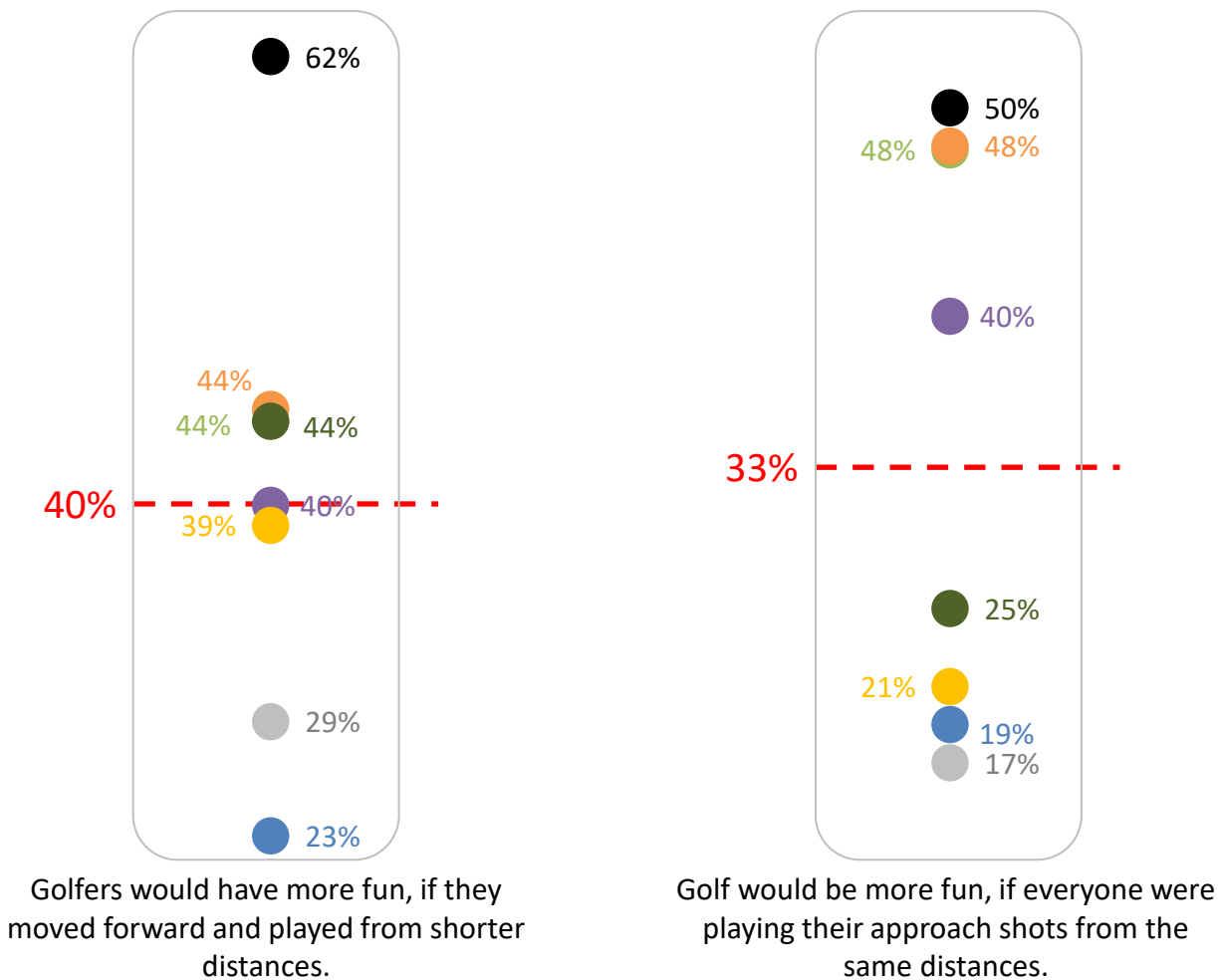
Q. How many different sets of tees are there at the golf course where you play most often?



Other Inhibitors: Perceptions That Shorter Distances Don't Lead To A More Enjoyable Experience

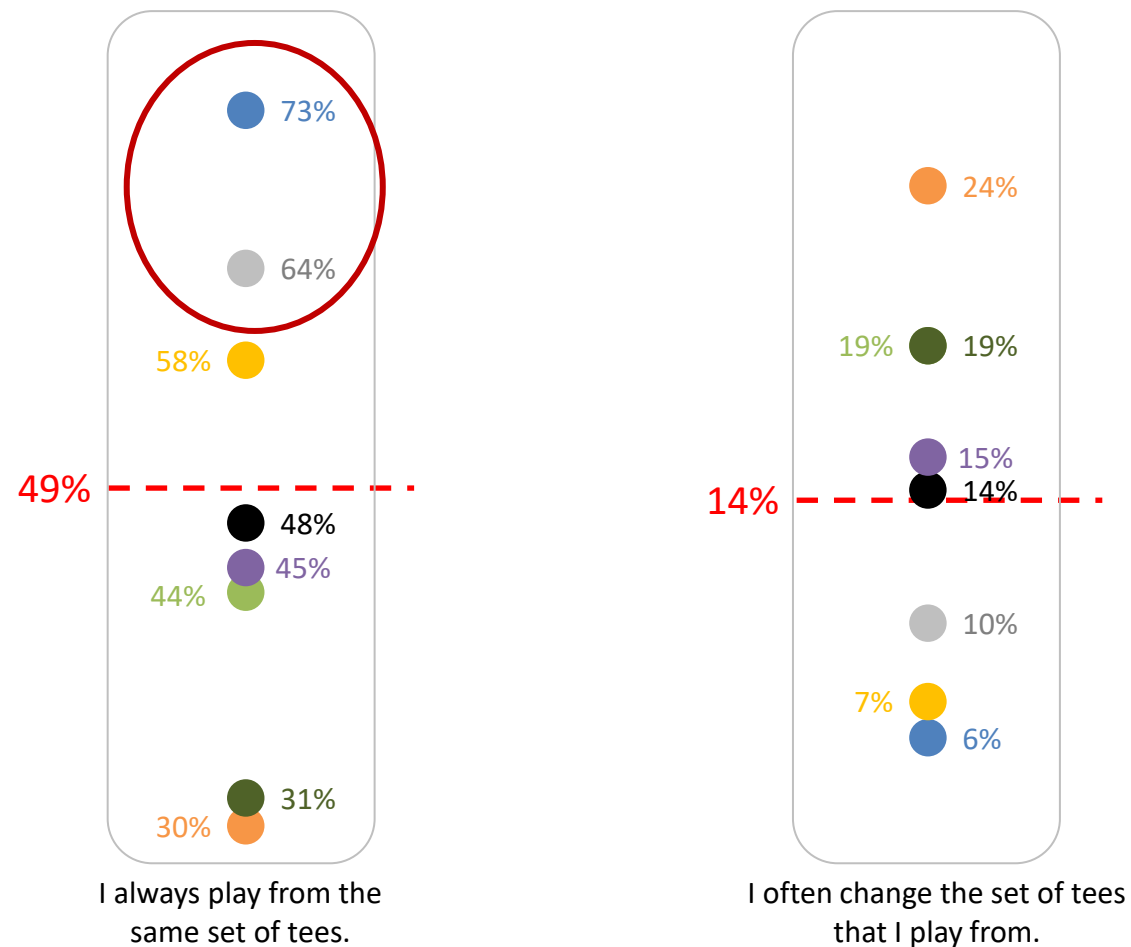


TOP 3 BOX



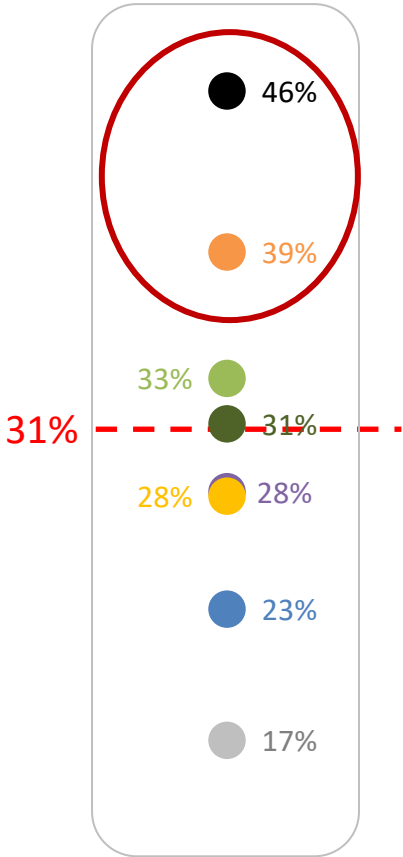
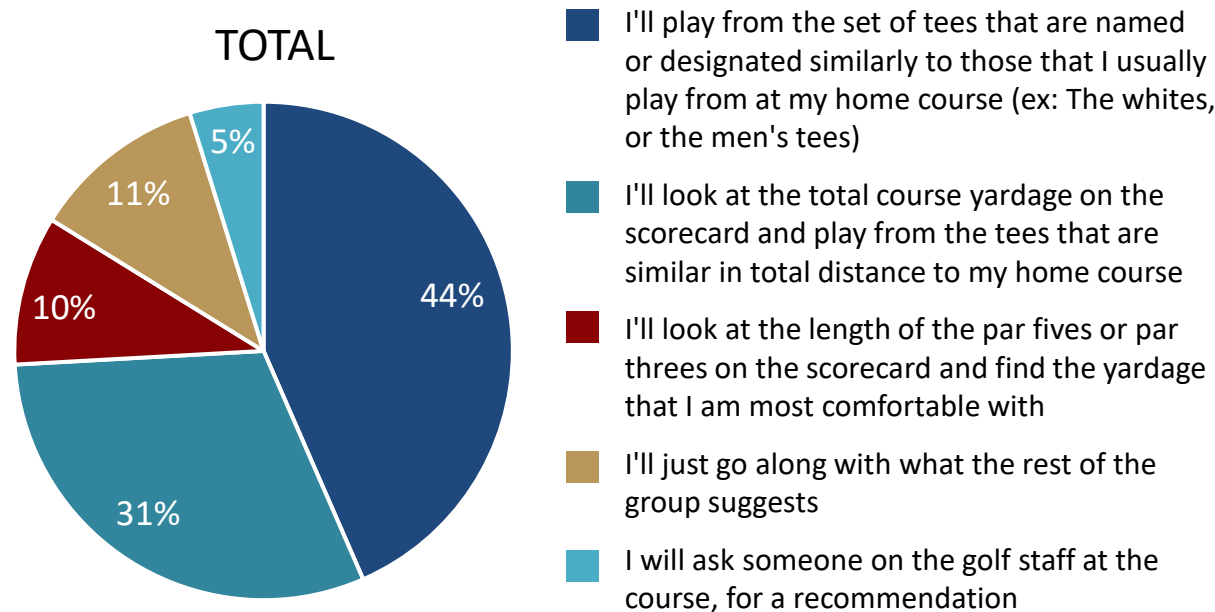
Obstinate Creatures of Habit

- Across segments, most stay with the tried and true, gender or age driven tee box conventions, seldom altering their approach.



The Plurality Will Play A New Course from The Same Tee That They Use At Home, Without Regard for Other Variables

Q. When playing a golf course for the first time, which best describes the way in which you decide which tees to play from?



I'll look at the total course yardage on the scorecard and play from the tees that are similar in total distance to my home course

Less than Half have Ever Switched Tees for any Particular Reason

Q. For which, if any, of the following situations have you played from a different set of tees than those that you would be most apt to associate with?

	Total	Disinterested Dabblers	Dipping Their Toes	Weekend Warriors	Good Timers	Sticks/She's All That	Traditional-ists	Young Athletes	Aging Athletes
For a social round of golf	45%	40%	44%	29%	50%	46%	54%	55%	44%
When playing with other golfers of different abilities than me	38%	25%	33%	27%	52%	36%	52%	47%	33%
For a competitive round of golf	31%	17%	19%	10%	28%	46%	42%	47%	42%
To practice specific aspects of my game	26%	21%	42%	10%	30%	34%	29%	28%	16%
To play faster	22%	12%	17%	12%	32%	22%	29%	36%	19%
Under atypical weather conditions	21%	21%	27%	14%	24%	24%	15%	23%	18%
When playing a new course	18%	17%	15%	15%	20%	20%	19%	19%	19%
To adjust for different playing conditions such as time of day or seasonality	13%	12%	15%	10%	19%	20%	4%	13%	12%
If injured or out of practice	9%	6%	13%	6%	13%	24%	2%	6%	4%
None of the above	11%	25%	10%	27%	2%	4%	10%	4%	7%

In Their Own Words: Golfers Are Hesitant to Move Forward from What's "Expected"

- Moving up is seen by some as “cheating” or “not legitimate”
 - Learning to play the course “as it was designed”
 - Shooting low scores from forward tees doesn't help you legitimately improve

It is kind of in a way cheating...OK you have a better score, but it's not the real score. I'd rather try to play the course the way that it was intended.—Patrick—Disinterested Dabbler

That's cheating for me if 103 became 83.—Eric—Dipping their Toes

That's [Defaulting to norms] a behavior learned early on in your golf life and hard to break that without some outside influence or reminder that its OK, or a data set that says, for you let's try it this time to push back to the other three in your group and say I'm doing this new behavior from an outside company or golf pro that suggests I'm doing it.—Wade E—Good Timer

Good luck!! You can't change behavior and you don't want to be the guy playing from the reds. Maybe you need to relocate the white tees to shorten the course and get past the ego.—Dave—Good Timer

By Definition and Observation, the Aging and Young Athletes Want to be Challenged and Hold Themselves to the Standard of the Best Players.

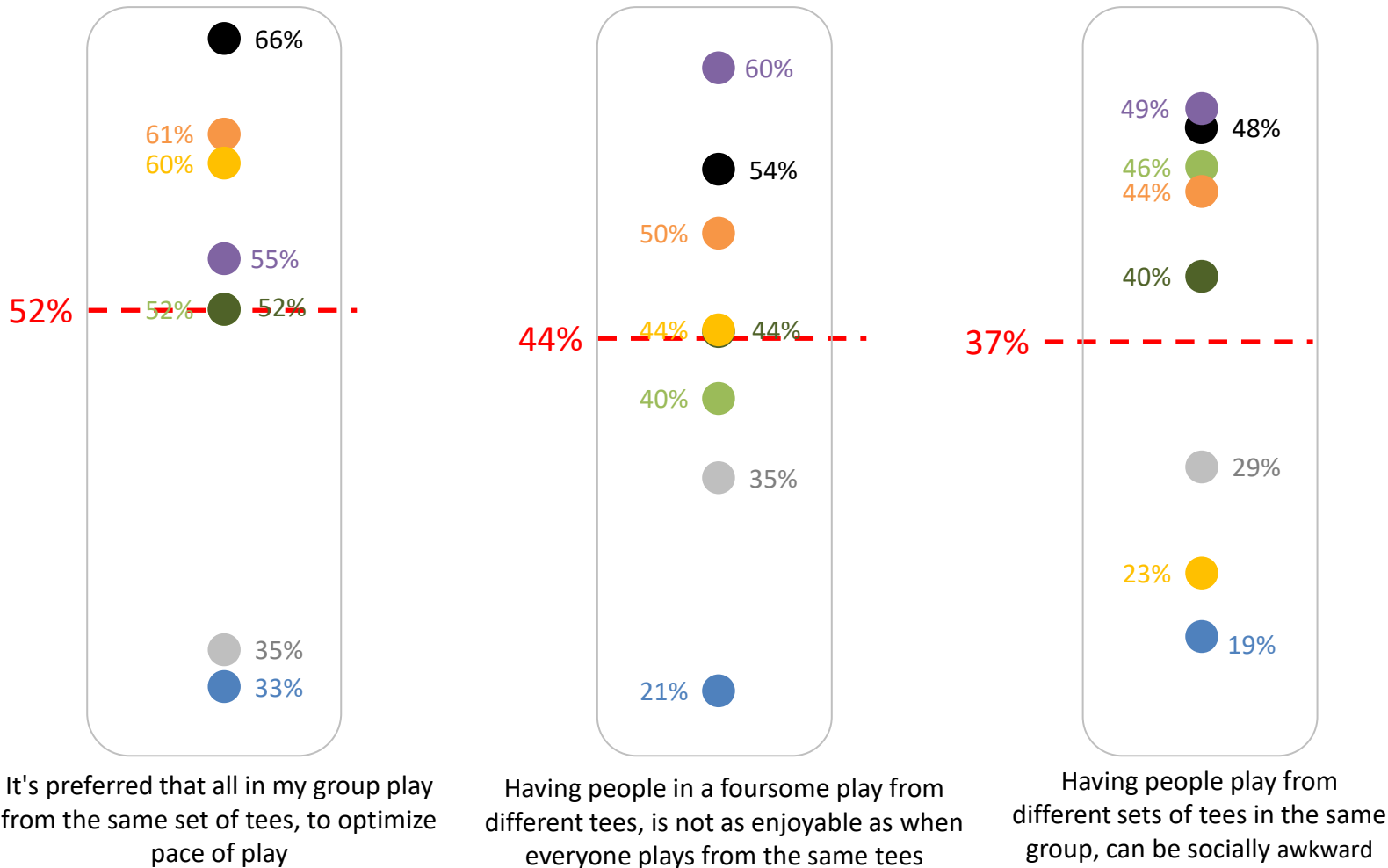
- Ego
- Self perception
- Conformity to perceived rules or norms
- Refusal to acknowledge the effects of aging or diminishing skills
- The nostalgic aspiration of putting it all together again
- Gauging yourself against the best in the sport



Similarly—There Is Pushback Towards Varying Boxes Within A Foursome, Unless It Is Driven By Gender Or Significant Age Differences

- Lack of strong consensus on enjoyment, awkwardness
- Pace of play impact was a big qualitative concern

TOP 3 BOX



Qualitatively, Starters are Much More Likely to Agree That People Don't Choose the Right Tee Boxes

- Wrong selection much more prevalent at public and resort courses
 - Typical to see players overestimate their distances
 - Several resort course starters lament that guests don't recognize that their home courses are shorter than the equivalent tee color at their course

Northern guests come down and because they play blue tees in NY or MI they want to play our blue tees and they haven't played in two to four months and they'll play these tees and come up much shorter because our course plays long and the ball doesn't carry as much..—Wayde, Resort Course Starter

I'd say probably 80% of the time [People choose the wrong tees]. We've advised some older golfers to move up....The biggest reason is pride. They don't want to feel like they have lesser skills.----Richard, Starter at TPC Facility

...But There is Hesitancy for Starters to Play Too Much of an 'Activist Role'

- There is a real hesitancy to seek to influence the decision at private clubs where “the member” is always right
 - Fear of “Rocking the boat”
 - Money games present a perceived obstacle



- Starters feel that they could help solve the issue, but many want to stay out of it
 - Resort course starters often incorporate recommendations and course introductions into their first tee interactions
 - Compliance is spotty and most prevalent among women and seniors
 - Younger golfers more apt to overestimate themselves or want to “take on the golf course.”

...But There is Hesitancy for Starters to Play Too Much of an 'Activist Role'



Your starter is probably your most important staff person. You aren't slinging bags for tips. You aren't setting up tee times. You are the person that sets the mood for the round.—Howard, Starter at Municipal Course

I think that they don't want people telling them what to do. They don't know or trust [us]. You can suggest but not force them—Howard, Starter at Municipal Course

I think most of the people at our club know that the starters have interactions with a lot of people including touring pros who come through and most respect our opinions and they often elicit our advice. They accept things that we say and may evaluate it...But I think suggestions are relatively well received...—Richard, Starter at TPC Facility

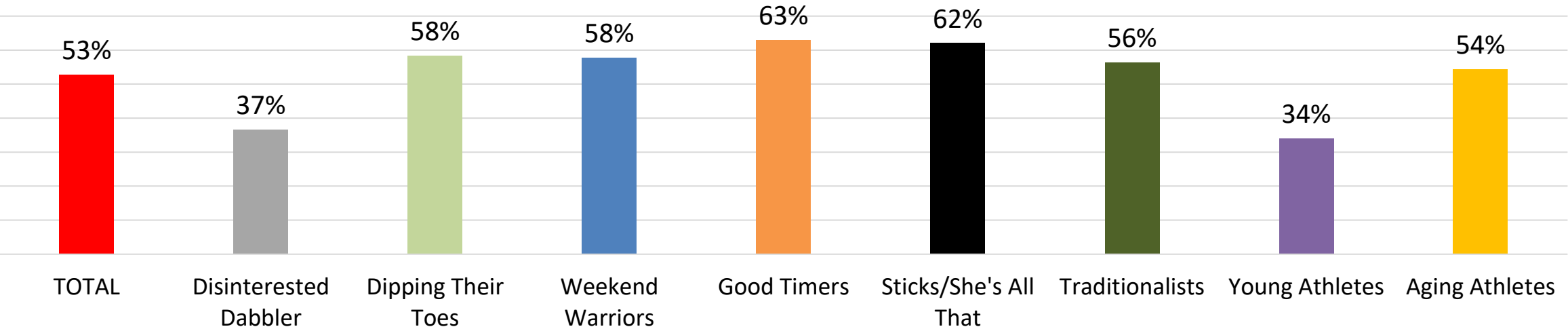
The starter or the person behind the counter is a conduit. He doesn't make the decision, and nobody wants to be told what to do. But he can frame a suggestion.—Chris—Stick

Golfers Fail to See Improper Tee Selection as a Pervasive Issue—Especially for Themselves

- The majority of golfers believe they are playing from the correct tees

In general, people play from the right set of tees for their ability and driving distance

TOP 3 BOX



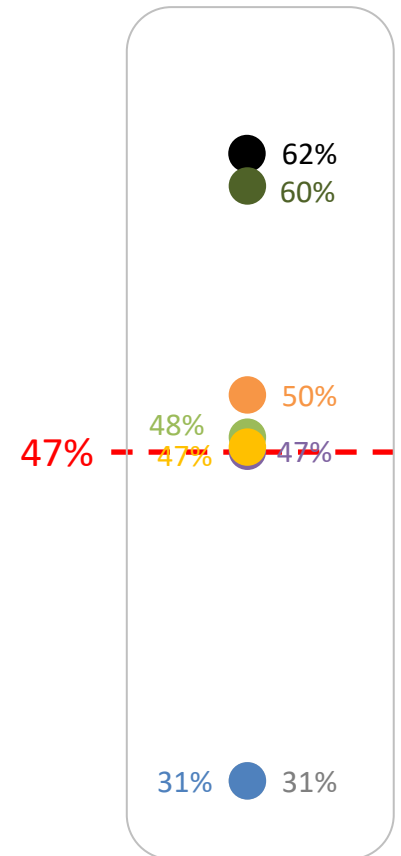
A Step Forward and a Dilemma—Letting Ability Guide Tee Selection

- There was some resonance behind the notion of using handicap or average distance as a guide towards tee selection or recommendations
 - Golfers were fairly split between which of the two measurement options (HCP/Avg Score vs. Driving Distance) was more appropriate
 - A plurality supported score or handicap as the better measure, compared to driving distance

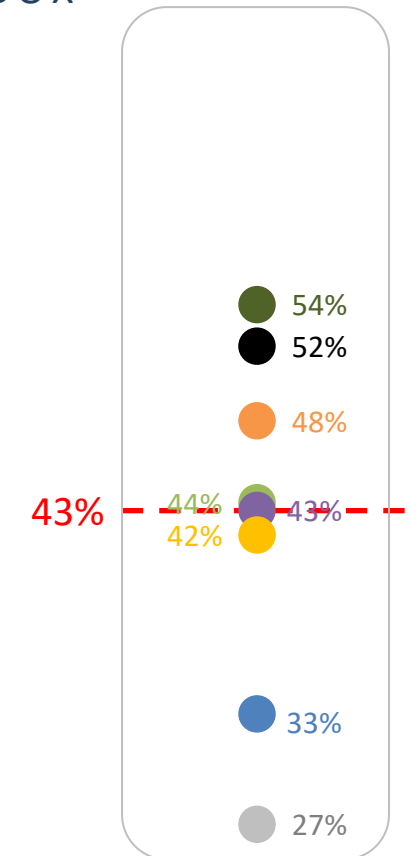
CASE FOR EACH

Handicap/Avg Score	Driving Distance
✓ Well understood	✓ With most players not having a handicap, there is a lack of practicality here
✓ Objective	✓ Driving distance makes sense for those seeking equity of approach shot requirements
✓ Plays into those seeking to see the golf experience catered to overall ability	✓ Some circle the wagons on the Longleaf system
✓ Some long hitters are still not good players	

TOP 3 BOX



Golfers should be assigned a set of tees based on their average score or handicap



Golfers should be assigned a set of tees based on how far they can hit the ball

In Their Own Words: Golfers Assess the Appropriateness and Practicality of Tee Assignment by Ability (Distance or Handicap)

"I guess I could find it [being assigned a tee based on either criteria] a bit offensive....like you aren't good enough to be over here." —Patrick—Disinterested Dabbler

"I don't think you can go by distance. Some old guys hit the green in three and sink a putt and walk off with pars. Other guys bomb it and can be just off the green and take four strokes to get up and down. Drive for show...putt for dough is true. Distance isn't always that important" —Andrew—Aging Athlete

"I'd love to say driving distance is the right criteria...but people will think of their longest rather than their typical drive." —Wayde—Resort Course starter

If I see somewhere on a chart, somewhere...even if it says recommendations...High handicap, mid handicap, low handicap it would at least help me because most people know what they score. If they shoot 120 and see 120 plays from here, they might move up to improve that 120. I think that would help...a recommendation.—Howard—Starter at Municipal Course

Judging off my scores I should be hitting off the first tee.. I don't think it should be based off your score...You can hit really far and still not score —Eric—Dipping their Toes

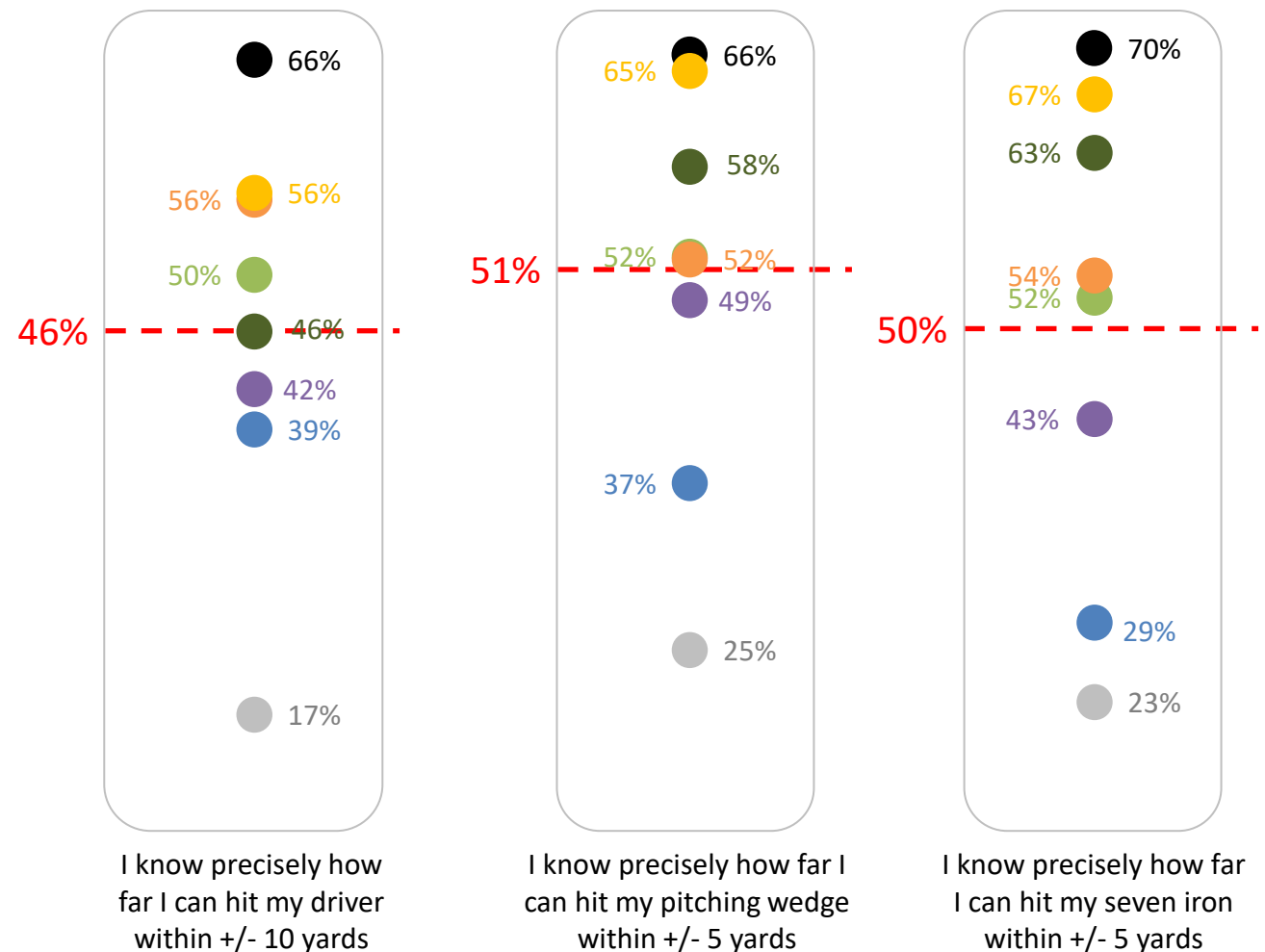
A Step Back: Knowledge of Hitting Distances are Overestimated/Correlate with Engagement

- Starters see the younger players as particularly apt to exaggeration and subsequently less receptive to their suggestions or influence
- Highly variant data across segments in the survey affirms this qualitative and observational finding
 - A majority of only three of the eight segments strongly agree that they know their driving distance within +/-10 yards
 - The Arccos effect—wearable personal technology can mitigate the situation with more widespread adoption

“Club guys know their games.”—David—Traditionalist

“The younger guys have inflated egos. They just want to play back and try to bang it.”—George—Aging Athlete

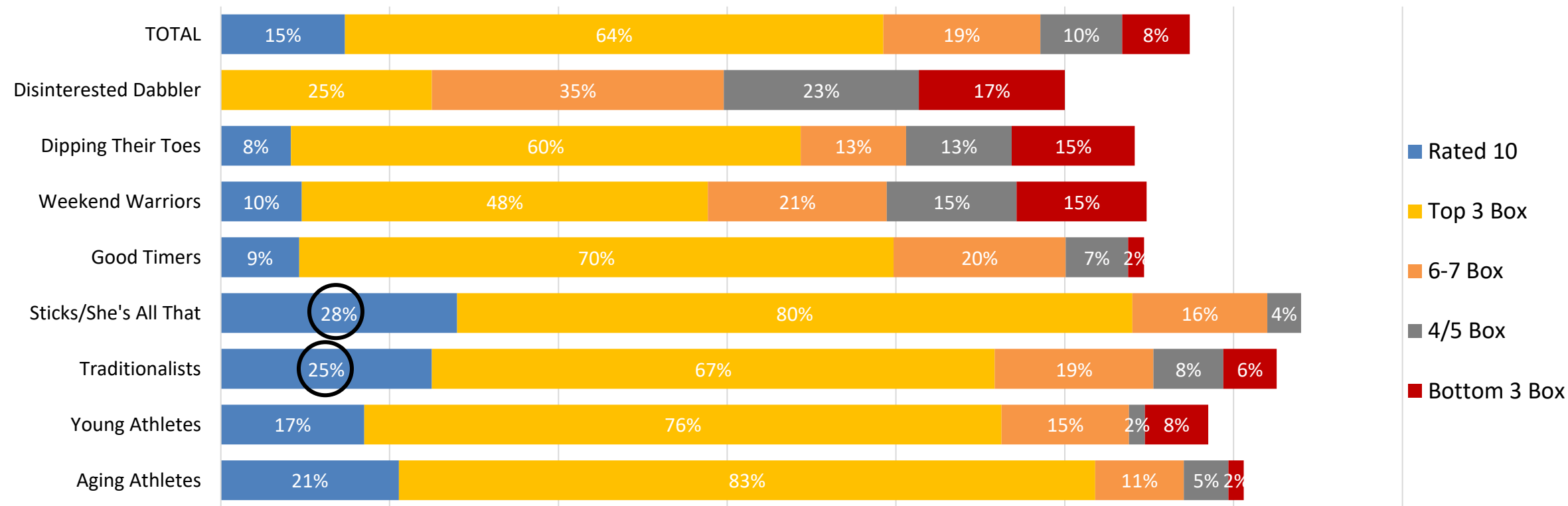
TOP 3 BOX



Similarly, More Than A Third Of Golfers Do Not Confidently Even Know the Course Yardage Where They Typically Play

- Only 15% are top box sure
- Big variations among segments
- Correlates with affinity and avidity

Q. Thinking about the regulation length golf course that you play most, off the top of your head, do you know how many yards it measures from the tees that you play most often?



Distance Insights Behavioral Research:

A COMPREHENSIVE LOOK AT TEE BOX SELECTION

Steering the Decision—A Detailed Look at the Test Concepts



15 Par
5
• 547 • 532
• 492 • 449

A large, light-colored stone marker is positioned on a grassy area. The stone has engraved text indicating the hole number (15), the par (5), and four yardage markers. The yardage markers are arranged in two columns: 547 and 492 on the left, and 532 and 449 on the right. Each yardage marker is preceded by a small colored dot (black, blue, white, and red respectively).

The No Name Lakes Concept Shows Promise!

- Most well received of all concepts, both qualitatively and quantitatively
 - Quant support from majority of respondents

If the golf course suggested a particular set of tees for me to use, based on my skill level, and it was different than where I typically play, I would follow that advice.

"No-name Lakes" Golf Course

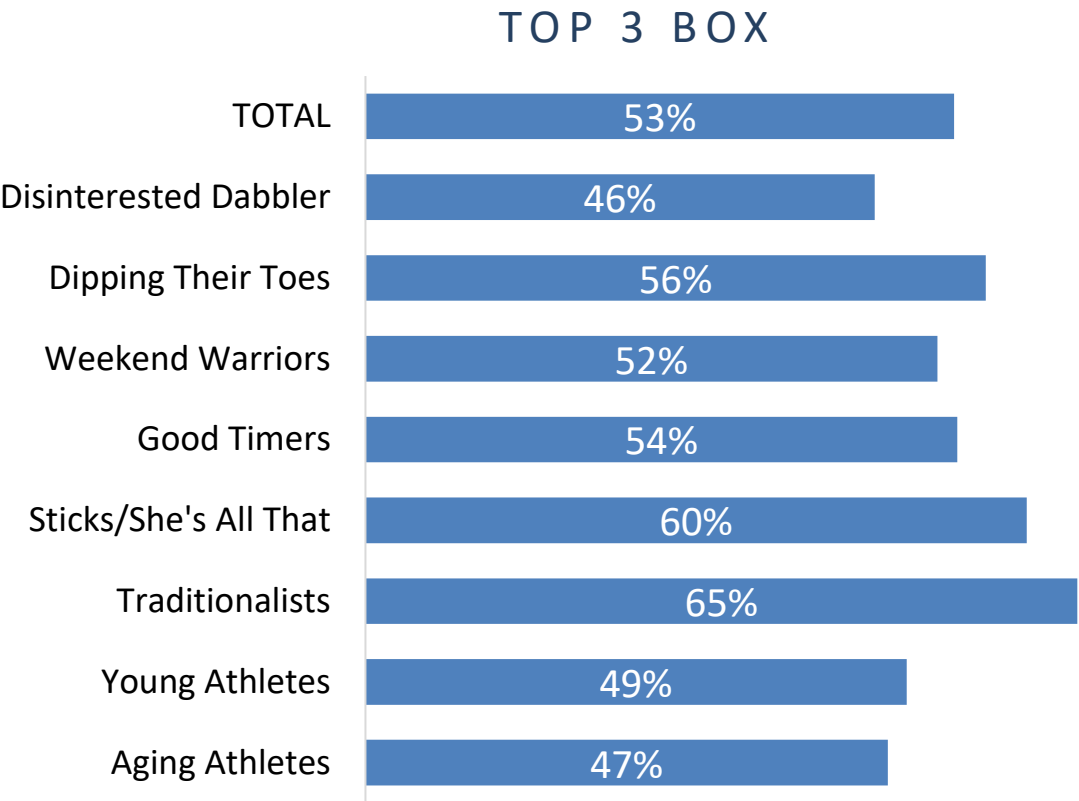
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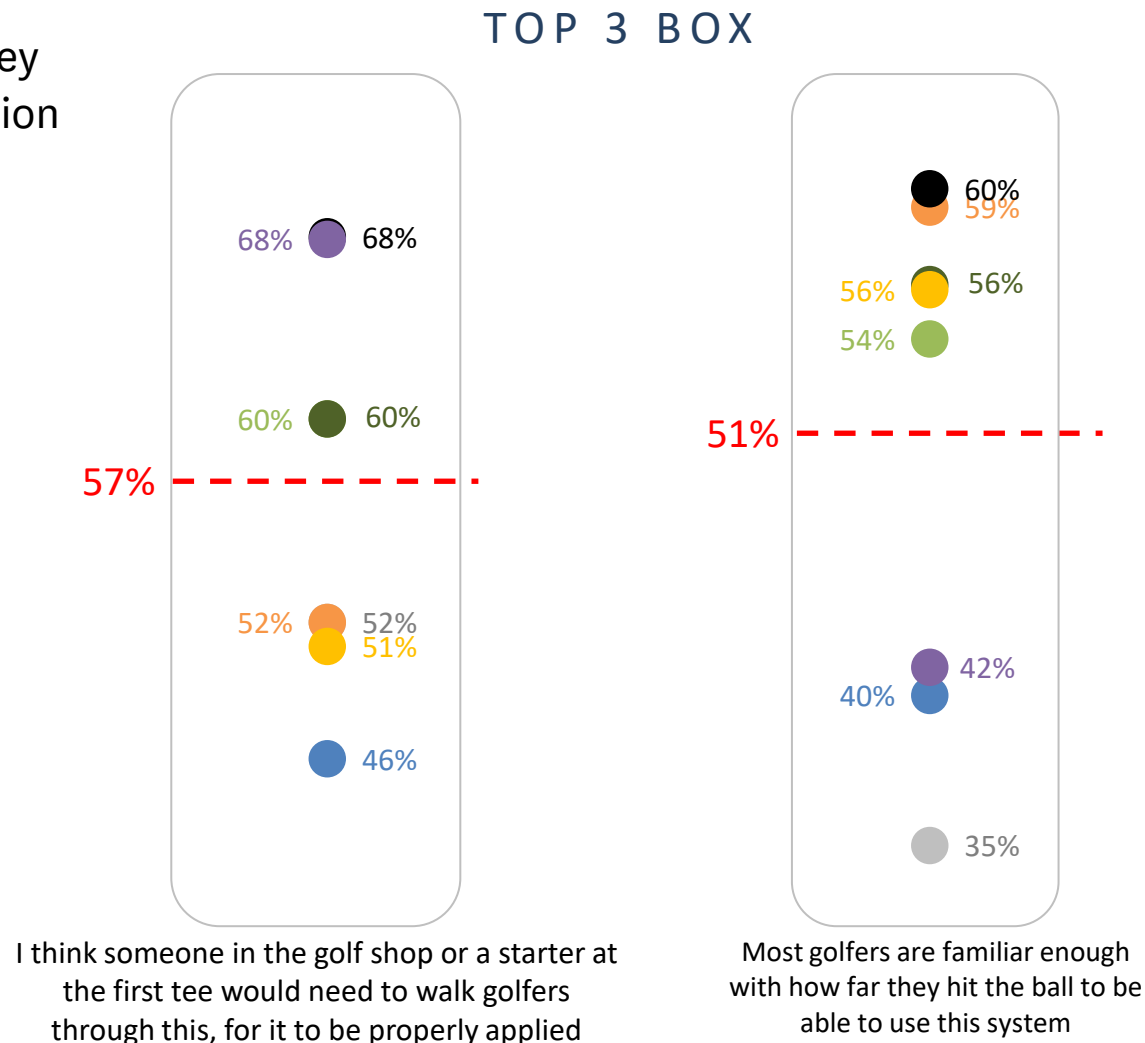
The No Name Lakes Concept Shows Promise!

- Direct willingness to accept the recommendations by nearly 60% when exposed to the concept —Majority of 7/8 segments
- However, projectively, less than half believe “golfers” would embrace this system

TOP 3 BOX	Total	Disinterested Dabblers	Dipping Their Toes	Weekend Warriors	Good Timers	Sticks/She's All That	Traditional-ists	Young Athletes	Aging Athletes
I would be willing to accept these recommendations when choosing where to play from.	59%	48%	63%	52%	63%	66%	67%	60%	58%
This would be a great way to enable golfers to choose the right tee to play from	58%	42%	69%	54%	57%	68%	67%	49%	58%
I think this would be very effective in helping golfers to choose the right tees	55%	44%	54%	50%	56%	70%	52%	64%	53%
This system is easy to understand	52%	35%	58%	40%	48%	58%	65%	57%	56%
I believe that golfers would embrace this system	47%	29%	60%	31%	54%	62%	52%	51%	39%

A Closer Look at Challenges and Impact of No Name Lakes Implementation Elements

- Some of the less engaged players acknowledge that they don't know their distances, so this could create confusion
- Likely needs onsite or pre-round guidance for implementation
 - From a starter
 - Upon tee time booking
 - On the scorecard



A Closer Look at Challenges and Impact of No Name Lakes Implementation Elements

- Fragmented lack of consensus on how to best implement the No Names Lake Concept:
 - Though scorecard captures plurality response

Q. If such a system were implemented, how would you prefer to see it distributed or delivered?

	Total	Disinterested Dabblers	Dipping Their Toes	Weekend Warriors	Good Timers	Sticks/She's All That	Traditional-ists	Young Athletes	Aging Athletes
Incorporated as part of the scorecard	23%	29%	17%	31%	13%	24%	21%	19%	30%
Reviewed by the starter or golf shop personnel	16%	21%	19%	15%	17%	14%	21%	9%	9%
As part of a digital app	15%	4%	23%	15%	24%	12%	13%	23%	7%
A sign or placard at the first tee	14%	17%	8%	8%	20%	12%	10%	11%	23%
A hardcopy sheet or card	13%	14%	10%	25%	6%	4%	15%	13%	16%
A sign or placard in the golf shop	11%	8%	19%	2%	7%	24%	4%	9%	12%
Within the GHIN or handicap system	5%	-	2%	2%	9%	6%	8%	9%	4%
On the practice tee	4%	8%	2%	2%	4%	4%	8%	6%	-

Other Salient Observations on the No Name Lakes Concept

- USGA branding will provide greater credibility
- Combination of data points is a plus, though some would rather see the recommendation come out transparently—digital application/algorithm
 - Some starters question whether concepts like forced carries or effective playing distance may be too complex or time consuming for the average player to think about
 - Should there also be an accuracy component?
 - The skiing metaphors are rampant, and intuitive for those familiar
 - Course specific factors seen as a logical and necessary component into guiding the recommendation

“No-name Lakes” Golf Course



This Course is categorized as a Difficulty Level 3 / Moderate (Orange Triangle) by the USGA Course Rating System

A Level 3 / Moderate, Orange Triangle Course has an average number of obstacles with normal difficulty. It is characterized by standard fairways, rough, hazards and overall challenges with occasional forced carries. It is mostly enjoyed by golfers of at least intermediate skill level who normally score less than 30 over par.

Average Hitting Distance			Longest Forced Carry	Tee	Type	Effective Playing Length
Driver (yards)	7-iron (yards)	PW (yards)	(yards)			(yards)
125	80	55	60	5	Physical	4000
150	100	70	60	4.5	Blended	4400
165	110	80	75	4	Physical	4800
180	125	95	95	3.5	Blended	5200
200	135	105	95	3	Physical	5600
210	140	110	110	2.5	Blended	5800
220	145	115	120	2	Physical	6000
235	155	125	120	1.5	Blended	6300
>250	>165	>135	160	1	Physical	6600

How to use this chart:

- 1) Measure (or estimate) your hitting distance for Driver, 7-iron and Pitching Wedge with a launch monitor or on a well calibrated driving range.
- 2) Locate the row most closely matching with your personal average hitting distances for all three clubs.
- 3) Make sure you are comfortable with the longest forced carry for that tee. If not, move up until comfortable.
- 4) Read across to find the recommended tee and type as well as the Effective Playing Length for that tee. Note that it will be different than the exact scorecard length for that tee because it accounts for doglegs, elevation change, forced layups and altitude.
- 5) Use the difficulty level of the course you play most often as a reference point. If you normally play a more difficult course, consider playing a longer course than you normally play. Conversely, if you normally play an easier course, consider playing a shorter course than recommended.

Our Original Launch Monitor Idea Resonates Both Organically and When Prompted



THE CONCEPT

- Integrate the use of a vector launch monitor, pre-round to inform the No Names Lake recommendations or “Suggestions” to “Choose Your own Fun”

RESPONDENT PROVIDED RATIONALE

- Adjunct to No Name Lakes
- Provides further objectivity
- Presents options in a non dictatorial way
- The interplay of data and emotion allows the individual to come to the right conclusion as if it is their own

In Their Own Words: Golfers Show Enthusiasm for “No Name Lakes” and the Integration of Launch Monitors

You need the psychology to give people permission [to move up]...the math that tells you and points to something that says it for you.—Chris—Stick

[The Chart] It's absolutely marvelous. I would love to condense it and put it on the back of the scorecard or posted on the cart, and I think it would help. I don't think people would take it wrong that way. They say this is who I am and what I do, and I don't have to figure it out. At least the course is trying to help people have a better time...and keep pace of play and let people have a better time. It's a suggestion of the best way to play this course.—Howard—Starter at Municipal Course

[The chart] is interesting in that it's driver, 7-iron and PW. The 5-iron is the standard of measurement in a bay.—Harry—Traditionalist

If I had that chart posted at our course, I think a lot of people would be able to pick out [Their tees]. I did it and I did 7 iron and drive was about right. So I thought that was also a good way to maybe help people and give them a guideline—John—Public Course Starter

[Before Concept Exposure] Radrick Farms (Ann Arbor, MI) has a chart that says if your handicap is this and you hit a driver X yards, you should play X set of tees.—Mark—Weekend Warrior

I like it. It takes the guessing game away from where a player should be hitting. I like the methodology. It may make players think differently about the game, if they have this published chart at each of the tee boxes...I see very low handicappers who don't hit it far...Maybe a combo of handicap, age and how far you hit it...Maybe there is a formula there.—Eddie—Weekend Warrior

(continued)

In Their Own Words: Golfers Show Enthusiasm for “No Name Lakes” and the Integration of Launch Monitors

(continued)

A Thought that just came to my head....maybe today, before you step on to the first hole, let's hit three shots on a simulator and it tells you where to hit that day. A Third party.. neutral guidance...maybe you hit it a blue distance and go to the blue tees and not even tie it to a specific yardage. It removes some of the stigma that I have to be better than my buddy or my father in law. That neutral third party making the recommendation would need to have a recognized authority that it is legitimate. It's not a marketing company or local golf pro who doesn't know you, but data that suggests...here's where you go—Wade E—Good Timer

Maybe you don't explain why you are doing it. Everyone wants to try Trackman...Just hit some golf balls and see what it says their average drive is and then once they see it, then introduce the tees. Would be very effective.—Richard—Starter at TPC Facility

A launch monitor has credibility.—Wayde—Starter

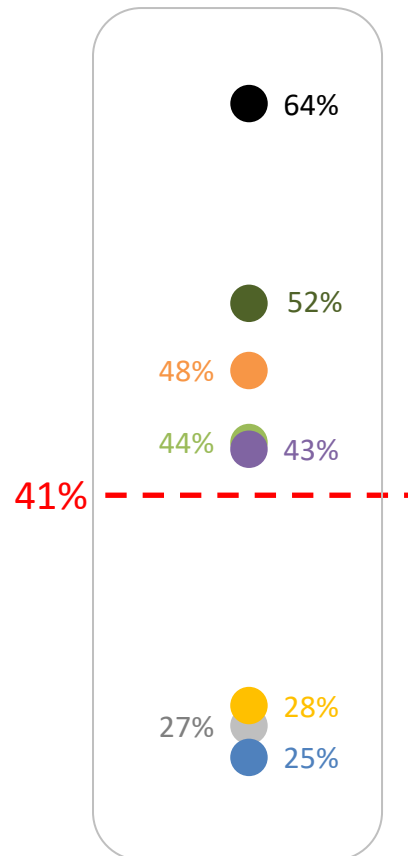
“If the USGA would back it, it would carry more weight.—Ryan—Young Athlete

I think that's about right. It checked with my distances. The chart was spot on. How do you gauge other's distance....Unless you used a launch monitor...Hit your balls and based on that you get your tee assignment..... I think something like that could catch on. The thing about golf is everyone relies on the USGA and what USGA outlines is what they outline and people seem to accept it. If USGA wanted to go on tee assignment based on ability, people would adapt to it.—Thomas—Traditionalist

Survey Support for the Use of Launch Monitors

- 41% have been on a launch monitor with Sticks, traditionalists and good timers most likely, as would be expected

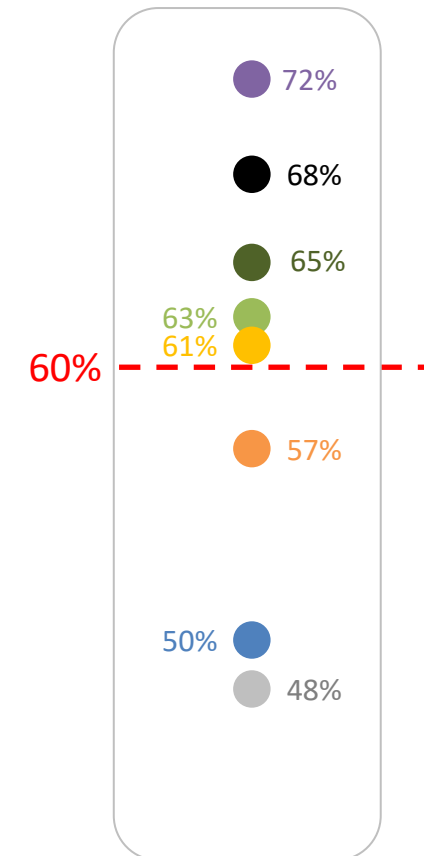
ANSWERED
"YES"



Have you ever had your driving distance measured by a Trackman device or similar vector" launch monitor... ?

- More than 86% agree that they are accurate and a majority of all segments except disinterested dabblers show top 3 box agreement
 - 60% overall and the majority of all but one segment, strongly agree that they would be interested in seeing their distance stats via launch monitor

TOP 3 BOX



If given the opportunity, I'd be interested to see my hitting distances and other statistics as measured by a vector launch monitor, like Trackman

Objections/Obstacles to Launch Monitor Usage in Tee Assignment

- Cost
- Human resources
- Time—Players arriving late or just moments before a tee time
- Private Club politics



This is good for a public course baseline... I guess at a private club, people are paying to belong and you don't want to discourage them and maybe their friends don't play those tees. It's more for guidelines for pace of play at a public course. I don't see it as something I'd put up in my club...It's a potential disservice that would stick numbers in people's face.—Jeremy—Starter

It's interesting but a tad overkill. First you have to go somewhere to get your yardages down. I find from those who don't use Arccos that they think they hit further than usual. For some it's an ego thing or people shoot the wrong distance with a range finder. I like an easier approach. You go and pick your tees and just play.—Andrew—Aging Athlete

Social Concepts Generally Lukewarm in Receptivity

- Resisting the urge to comment or joke and selecting tee boxes to place approach shots in the same vicinity are the only concepts that resonate with majorities
- Having the whole group walk is impractical for many interviewed (and backed up in the quant)

TOP 3 BOX COMPELLING	Total	Disinterested Dabblers	Dipping Their Toes	Weekend Warriors	Good Timers	Sticks/She's All That	Traditional-ists	Young Athletes	Aging Athletes
Resisting the urge to comment or joke about a golfer playing a shorter course and having an advantage.	56%	56%	50%	44%	59%	66%	54%	64%	54%
By playing tees that match each golfer's driving distance ability, approach shots are more likely to be in a similar vicinity and greens in regulation will increase which helps pace of play and provides more time for social interaction	55%	42%	56%	48%	63%	60%	56%	57%	58%
Safely move an empty cart to the next tee being used when both its golfers are at the longer tee and it's an easy walk for them.	44%	42%	52%	23%	39%	58%	52%	43%	44%
The whole group walks instead of riding in carts	43%	27%	56%	27%	50%	60%	54%	47%	23%
Having at least two golfers visit each tee, even if only one golfer is teeing off	42%	33%	46%	27%	44%	62%	40%	53%	32%

In Their Own Words: Golfers React to the Social Concepts

I like the option of being with the others at their tee boxes rather than just sitting in a cart, because it's a social game, and that's what I try to tell people—John—Public Course Starter

Walking is out of the question. My guys don't want to walk and I'm too heavy. Second one is most realistic with two guys at every tee...Never have one person by themselves hitting. If it is a busy Saturday afternoon and the course is packed, you don't want a guy up there by himself and when the guy hits, you slowly go down while one guy is hitting and the other guy is getting ready and it slows it down.”—Andrew—Aging Athlete

We all play different tees in our group and our social interaction has changed zero. It's not an issue for us. —Gary—Weekend Warrior

I don't like moving the golf cart...Membership would look at that as weird and I don't think it works operationally. Other people coming down with them....I don't mind, but I have guys who are always talking when they aren't swinging. I'm concerned about it slowing things down to an extreme. It kind of goes against Ready Golf. Walking and caddies are the best point.—Jeremy—Starter

It's etiquette. Someone should always be with each golfer teeing off at their tee box.—David—Traditionalist

[Moving up] was a choice I made. Before that, we were teeing off from different spots. In some cases, the team behind us made fun of the other guys and I didn't like the fact that sometimes people were calling them names....'the old guys are teeing off now from the whites' when they saw me teeing off from the blues. Lots of joking and screaming and I wanted to change that...and eliminate that.—Eddie—Weekend Warrior

Potential Speaking Points Don't Necessarily Favor Empirical Evidence over Emotional Appeal

- Both quantitatively and qualitatively, presenting data to support how proper tee box selection improves pace of play, scores and provides more fun/birdie opportunities is the only speaking point to garner majority top three box
 - An emotional vision of the same is second, but only captivates a majority of two segments
- Playing the course as architect intended resonates for some...but creates confusion and contrasting opinions for others—does it mean playing from the tips or everyone having the same approach shots
- Quantifying the positive impact on pace of play could be compelling across all segments

[The first time] I played Bethpage Black and played it from tips with no business doing it and shot 121..but I wanted to see how it plays from a PGA level. — Ryan—Young Athlete

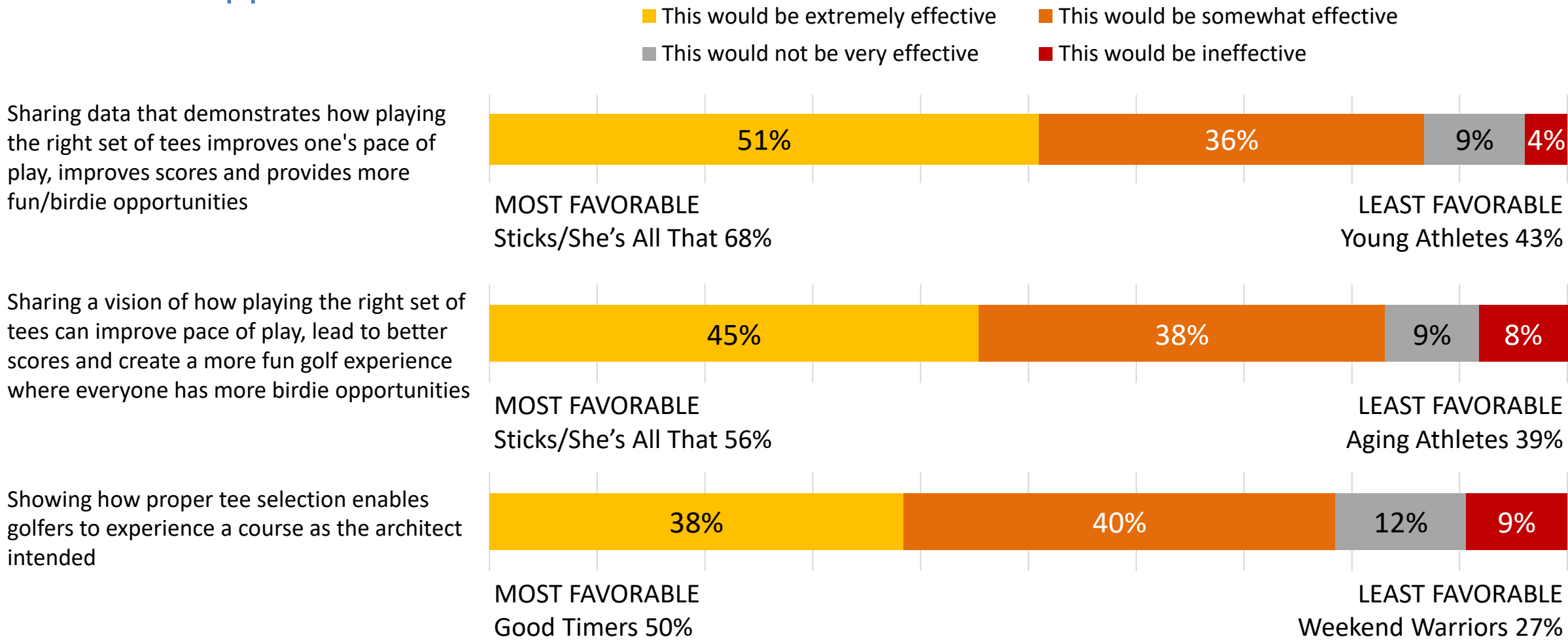
I think showing hard numbers but hoping you also appeal to their sensibilities. —Richard—Starter at TPC Facility

Show people WHY they should be playing these tees...Here's your handicap, age, distance. Then there's no stigma....Facts and reason are easier to swallow. —George—Aging Athlete

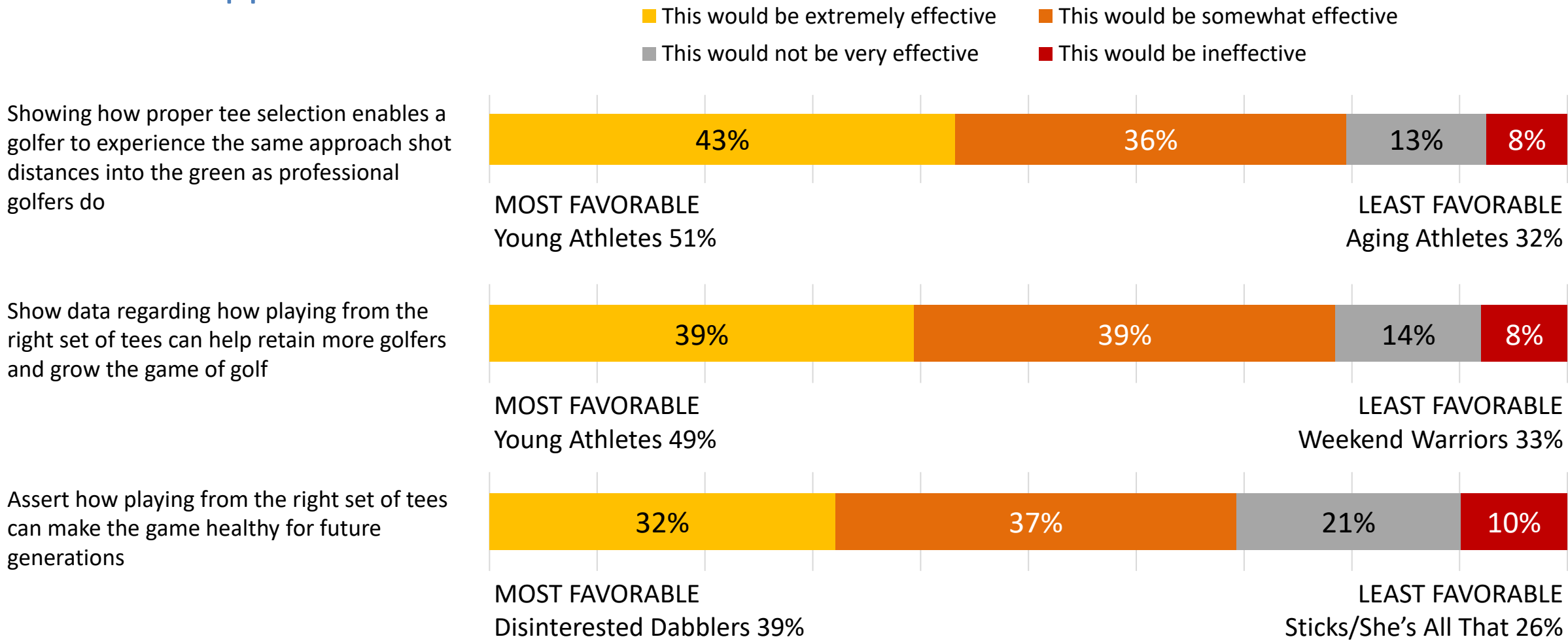
To think that this will actually allow me to play the course as it was intended, is a refreshing point of view and a huge mind shift...to feel the connection to the history of the course...not necessarily to compare myself to others... The data only takes you so far. Do I base my decision off of logic or emotion. Facts tie into the logic part, but the emotion driver is I can play it how Bobby Jones envisioned me to play this course. —Wade E—Good Timer

Reversing golf's decline is less compelling. Data and analysis isn't an imposition but it provides the means for people to come to the right conclusion. —PD—Traditionalist

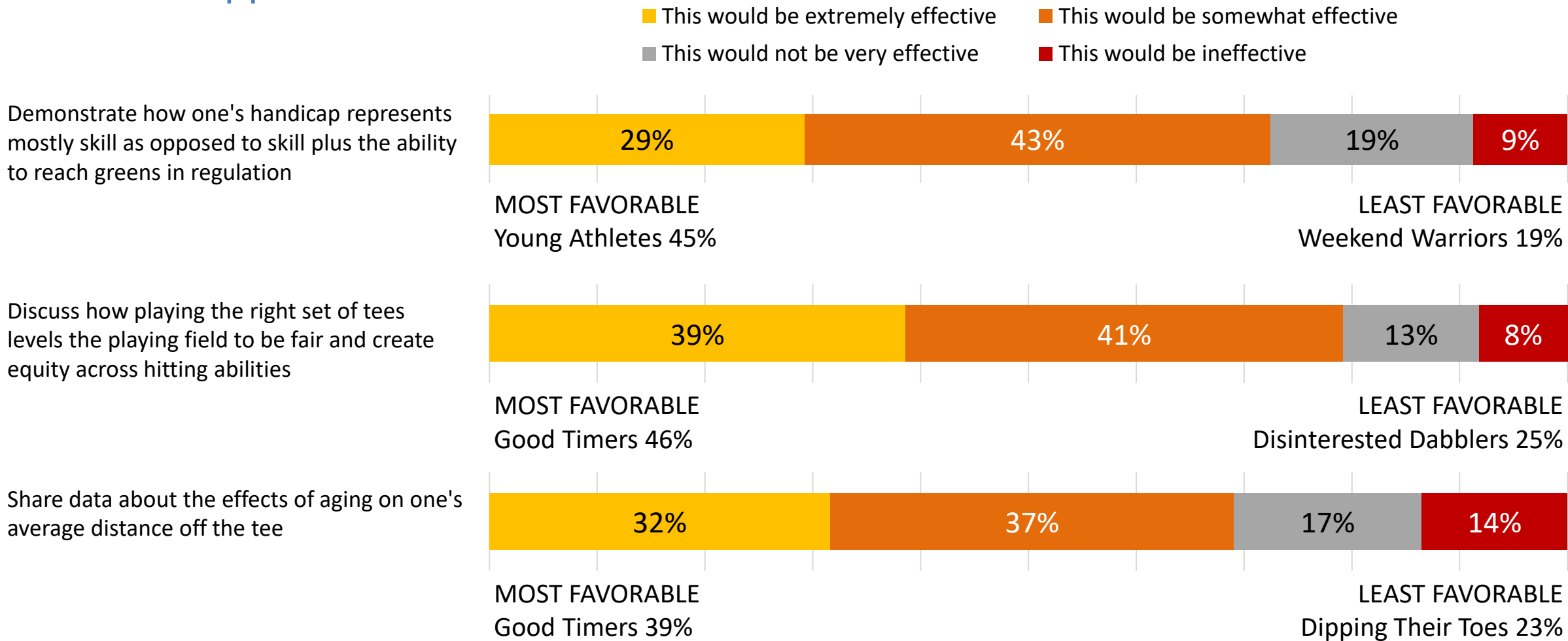
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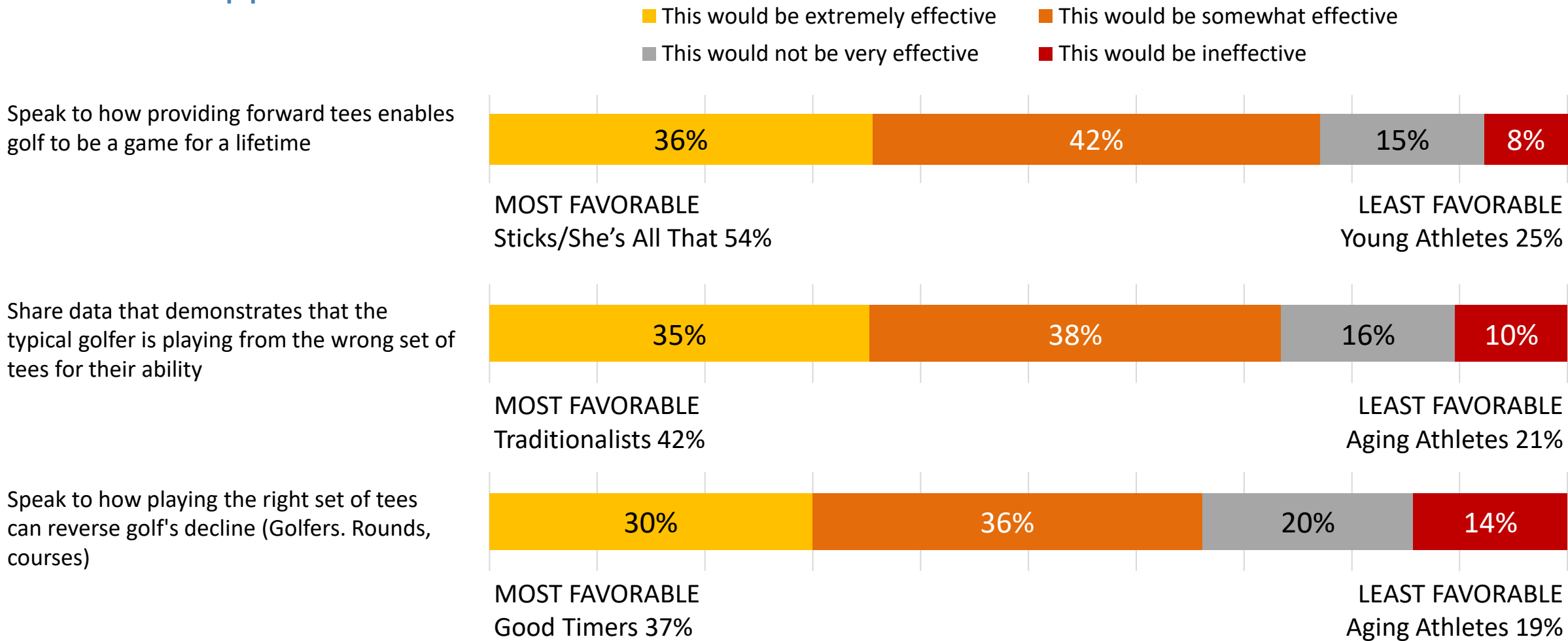
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Potential Speaking Points Don't Necessarily Favor Empirical Evidence over Emotional Appeal



Two Other Organically Surfaced Ideas for “Objective” Tee Box Selection

- The Rule of 36
 - Play the course yardage that is 36 X how far you hit your five iron
- Start forward and don't move back until you make a par



Distance Insights Behavioral Research:

A COMPREHENSIVE LOOK AT TEE BOX SELECTION

IMPLICATIONS AND RECOMMENDATIONS:
Where Do We Go From Here?



15 Par
5
• 547 • 532
• 492 • 449

Implications and Recommendations: Where Do We Go From Here?

1.

PURSUE THE DEVELOPMENT AND IMPLEMENTATION OF “NO NAME LAKES”

- Refine and Evolve the Inputs
 - Handicap/Average Score to further inform and augment hitting distances
 - Incorporate the use of launch monitors
 - Develop and potentially monetize communications/implementation vehicles by leaning into USGA brand equity
 - Scorecards/signage
 - Kiosks
 - Digital/Mobile Application
 - Leveraging Starters

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Implications and Recommendations: Where Do We Go From Here?

2.

BUILD OUT AND DIFFUSE THE PROOF POINTS (CONCEPT 3)

- Build the Empirical Data Set
 - Sharing data that demonstrates how playing the right set of tees improves one's pace of play, improves scores and provides more fun/birdie opportunities
- Develop Requisite Messaging
 - Share the vision of improved pace of play, better score and more fun
- Consumer Test Both to Optimize Effectiveness



Implications and Recommendations: Where Do We Go From Here?

3.

Provide Facility Tools to Remove the Stigma and Break Down ‘Sacred Walls’

- Pivot Away from Traditional Color, Age and Gender Naming Conventions
- Offer Industry Recommendations and Best Practices to Guide Member Facilities

