



**FRANKLY**

**Growing the Game**  
**Survey Report**  
**November 2005**

**Index of Contents:**

<b>Introduction and Background</b>	<b>page 2</b>
<b>Summary of a Preliminary Analysis</b>	<b>page 3</b>
<b>Study Details:</b>	
<b>Methodology</b>	<b>page 5</b>
<b>Results:</b>	
<b>Demographics and Golfing Skills</b>	<b>page 6</b>
<b>Reasons why People Play Golf</b>	<b>page 9</b>
<b>Time to play</b>	<b>page 11</b>
<b>Estimated Distances for Various Clubs</b>	<b>page 12</b>
<b>Golf Course Preferences</b>	<b>page 14</b>
<b>Golf Course Configuration and Condition</b>	<b>page 19</b>
<b>Design for the Average Male Respondent</b>	<b>page 19</b>
<b>Design for the Average Female Respondent</b>	<b>page 20</b>
<b>Why People Quit Playing Golf</b>	<b>page 21</b>
<b>Conclusions &amp; Comment</b>	<b>page 21</b>
<b>Future Research</b>	<b>page 23</b>

## **Introduction and Background**

In September 2004, we prepared a questionnaire enlisting support to help Grow the Game. We received more than 18,400 responses from around the world.

Other studies have shown that the number of rounds is down, and golfers are not playing as much as they did in the past. Many people have opinions as to why the game is not living up to its potential from an enjoyment and participation standpoint, and most of these are sound with some evidence to support them.

This report details our preliminary results from the first part of an extensive and ongoing study designed to identify the reasons for the decline in participation. It examines course preferences and the reasons why people play and why they give up the game.

In 2001 the Little Family Foundation, with the support of the National Golf Course Owners Association Foundation, commissioned Frankly Consulting to conduct a study testing the validity of a concept of course design and setup, developed by Arthur D Little and Jann Leeming. Their design concept involved locating tee positions in a manner to enhance enjoyment of the game for players with a wide variety of golfing skills.

This research study is designed to quantify the actual performance of golfers in a variety of golfing skills, and also to develop through an interview process a better understanding of the golfer, his/her needs and preferences and opinions about the attractive and unattractive aspects of the game. From the findings, a set of recommendations are to be made and evaluated with an aim

toward increasing enjoyment and participation for current golfers, as well as making the introduction to the game less stressful and more pleasant for new golfers.

The pilot and initial phase of the study quantified the actual distance performance of various golfers using different clubs and compared these to their estimated performance. Another goal was to develop an extensive questionnaire to learn more about golfers' preferences about course design and setup, as well as what attracts them to the game in the first place. The questionnaire also sought information about why people might leave the game after having started.

The goal of the study is to make recommendations regarding course design and setup to address the needs and preferences of a wide range of golfers. This should result in improving enjoyment and participation as well as simplifying the process of introducing newcomers to the game. It is anticipated that the adoption of the recommendations will effect a change reversing the downward trend in participation.

## **Summary of a Preliminary Analysis**

There were 18,400+ responses to the on-line survey from 44 countries. As participation is more of a problem in the US (even though it is starting to be a concern in other parts of the world), The following summary examines the responses of 14,422 US golfers, both female and male.

- 7% of the responses came from women, which is fewer than expected.
- The responses are evenly distributed across country.
- The median age (in years) of the respondents is 51, with over 85% of males and 89% of females between the ages of 30 and 69.
- The handicaps of the male respondents are several strokes better than the national average, and the handicaps of the

females are about ten strokes better than the national average

- The respondents as a whole are considered avid golfers, playing more than 30 days a year.
- Most (70%) play at Daily fee, Municipal and Semi-private courses.
- Those who have spouses or significant others who play golf, would play more with them if the environment and course were more accommodating and the cost were more affordable.
- About 26% of the male respondents and 47% of the females do not have children.
- The reasons why people play golf are heavily tilted toward the enjoyment from hitting good shots; the personal challenge between the golfer and the course; enjoyment of outdoors; pleasure of meeting and playing with others; and the physical benefits from the exercise.
- Considerably less important for most respondents were relief from mental stress; competing against others; and social activities.
- Most golfers overestimate the distance they drive the ball by approximately 30 yards.
- The actual measured distance the male golfer scoring between 90-95 hits his drive is 192 yards on average. The actual measured distance the female golfer scoring between 95-100 hits her drive is 145 yards on average
- Most male golfers prefer to play courses between 5,800 and 6,600 yards long. Some (45%) of those with handicaps between 0-9 preferring to play courses longer than 6,600 yards long with the higher handicappers tending to prefer courses shorter and closer to the 6,000 yards long.
- 64% of the female respondents with handicaps between 0-9 prefer courses between 5,800 and 6,600 yards long. (17% of the female respondents have 0-9 handicaps ) However, most female golfers prefer to play courses between 5,000 and 5,800 yards long and 15% of those above 30 handicap would prefer to play courses less than 5,000 yards long.

- Most golfers want average course conditions (lengths and conditions for par 3s, 4s, and 5s are listed below.)
- Most golfers take between 4 to 5 hours to play 18 holes with the lower handicap golfers playing faster than the higher handicappers. Also there is a tendency for longer hitters to play in less time than shorter hitters.
- In the opinion of the respondents, the major reasons why golfers quit playing are: that it takes too much time from the family; too expensive; too long to play 18 holes; they tried but didn't have fun; too difficult and takes too long to learn; and females especially don't want to be embarrassed.

Subsequent reports will cover course design and suggestions and recommendations to increase participation, which if implemented should have a very positive effect on the health and enjoyment of the game.

## **Study Details**

### **Methodology**

A pilot study at Pinehurst NC was conducted to determine how far golfers hit the ball with various clubs. This data was correlated with how far they estimate they hit each club. In conjunction with this practical evaluation, and a series of interviews about the golfer, his/her game, and preferences about the course and setup, we developed and posted an online 53-question survey, promoted by 23 industry and association websites.

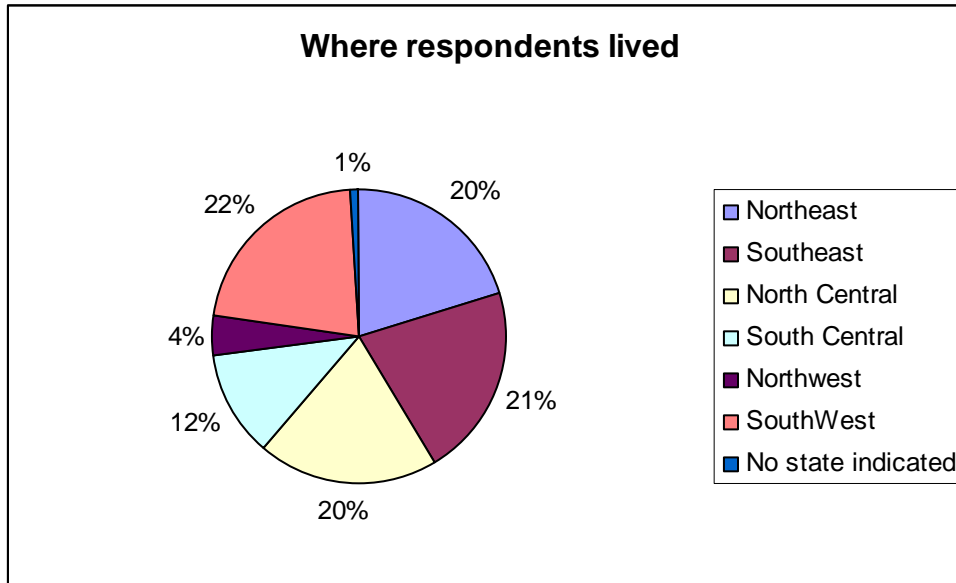
The questionnaire sought information about: a) the respondent, his/her game and activity, including an estimate as to how far they hit certain clubs, b) their family's participation in the game, c) their specific attraction to the game, d) the type of course, layout and length they prefer, and e) their opinions as to why they believe people discontinue playing golf.

# Results

## Demographics and Golfing skills

### Age and Residence

The mean average age (in years) of the respondents is 54 for males and 51 for females. Their residences are evenly distributed (approx. 20% each) across four regions in the USA (NE, SE, SW & N. Central), with 12 % from S. Central and 4% from NW.



### Handicaps

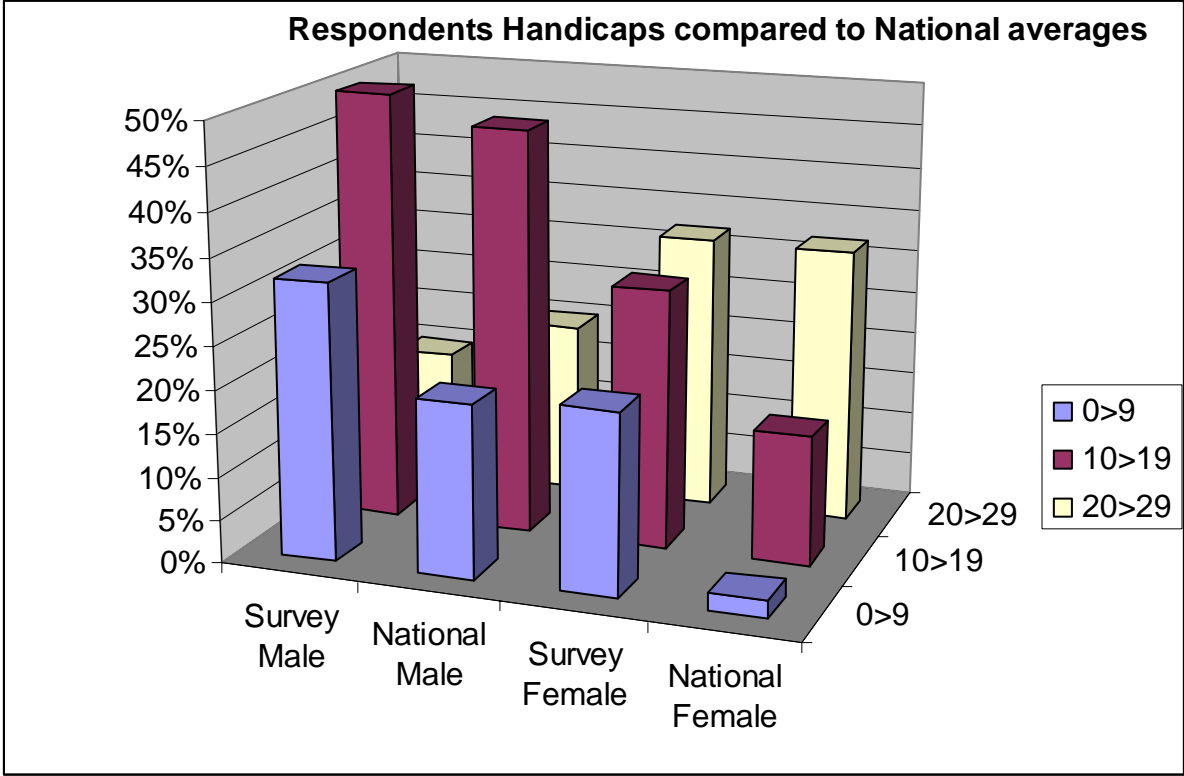
Of the 84% who have a handicap, 82% of the males have a handicap between 0-19, and 62% of females between 10 and 29. (Average “National” handicap for males is 15 and females is 28; Source: USGA GHIN system information of those with handicaps)

#### *Respondents' Handicaps compared to National Handicaps*

<i>Hcp. Range</i>	<u>Male</u>		<u>Female</u>	
	<i>Survey</i>	<i>National</i>	<i>Survey</i>	<i>National</i>
0 ----- 9	32 %	20%	21%	2%
10 --- 19	50%	47%	30%	15%
20 --- 29	15%	20%	32%	32%

**Note:**

**The percentage of female respondents have a higher percentage than the national in the 0 – 19 handicap range, but the same in the 20 – 29 range. The percentage of male respondents was slightly higher than the national average in the 0 – 19 handicap range, but slightly lower in the 20 – 29 range. This will lead to preferences regarding course and hole length and forced carries etc. being tilted toward the lower handicap golfer.**



**How long they have played and how often they play**

They are avid golfers, with 69% having played for more than ten years and 70% playing more than 30 days a year. Males in this group of survey respondents play more than females, and lower handicap golfers (0-19) play more than the higher handicap golfers.

## **Where they play**

77% play at Public courses (Daily fee, Municipal, and Semi private), 19% play at Private courses, and 2% each play at Resort and Military courses.

Low handicap (0-19) females play at private courses more than other courses. About the same percentage (25% to 30%) of males with handicaps 0-9 play at private, semi-private and public courses. But about 46% of males with handicaps above 9 play at public (daily fee) courses.

## **Their Family**

Of the respondents 46% of the males and only 10% of females have spouses or significant others (SOs) who don't play golf. Some (11%) don't have spouses or SOs.

30% of the males play with their spouses or SOs (either frequently, occasionally or seldom) and 6% never play with them.

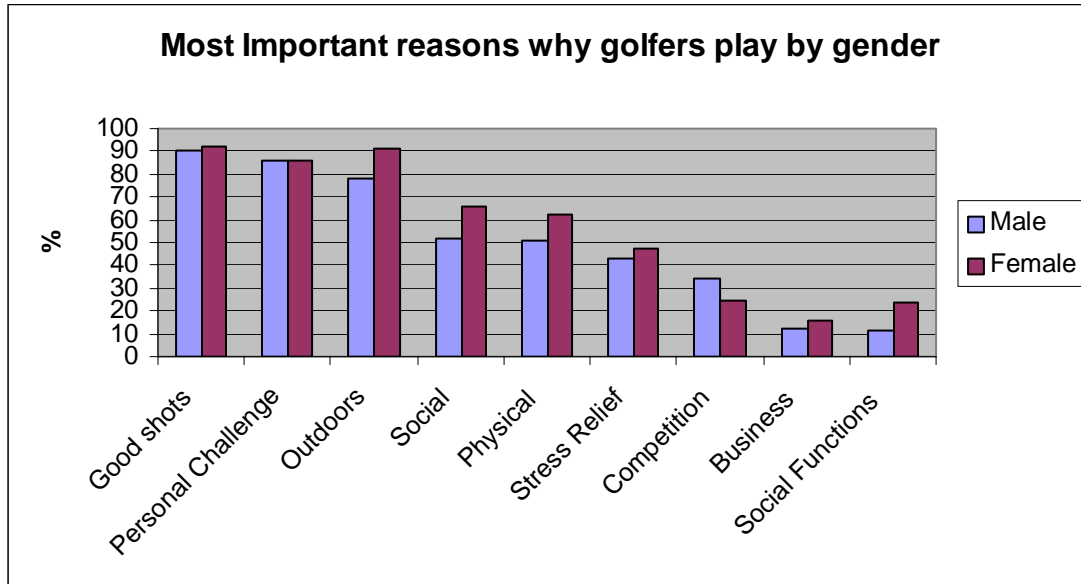
About 34% of males and 42% of females would play more often with their spouse if the golf environment/course were more accommodating and affordable.

45% of the males and 35% of the females have children who play golf. 26% of the males and 47% of the females do not have children.

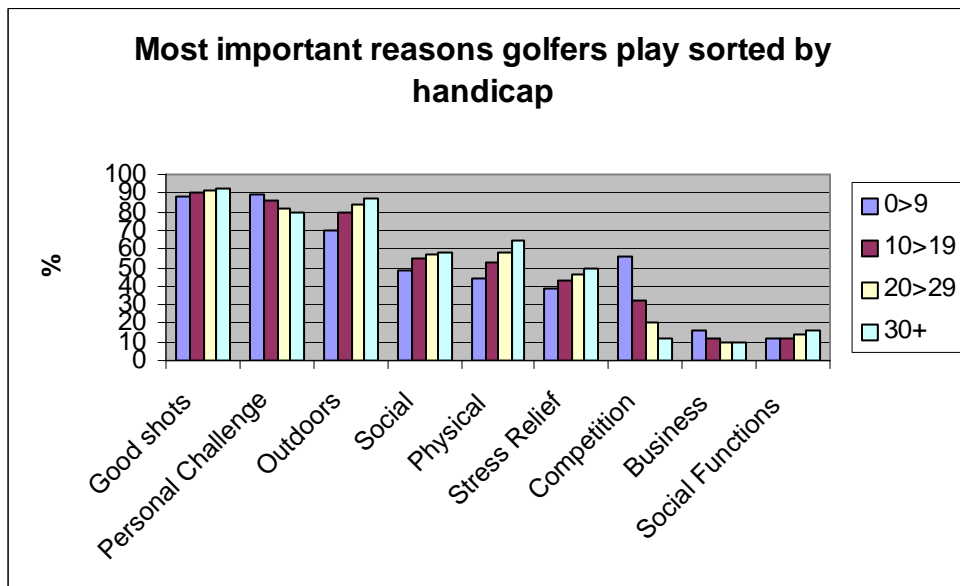


# **Reasons Why People Play Golf**

*Respondents were asked to indicate the importance to them (most, less or least) for each 'reason' presented. The percentages below are those reported in the "Most" column.*



Males and females both indicate that hitting good shots, the personal challenge the game presents, and an enjoyment of the outdoors are the most important reasons why they play golf.



When we examine reasons for playing by handicap level we find that golfers of all handicap levels play because they enjoy hitting good shots, facing the personal challenge and being outdoors.

However when we look more closely there are more subtle reasons why golfers play. For example, for the 0>9 handicap level we find that competition is much more important than it is for the other handicap levels.

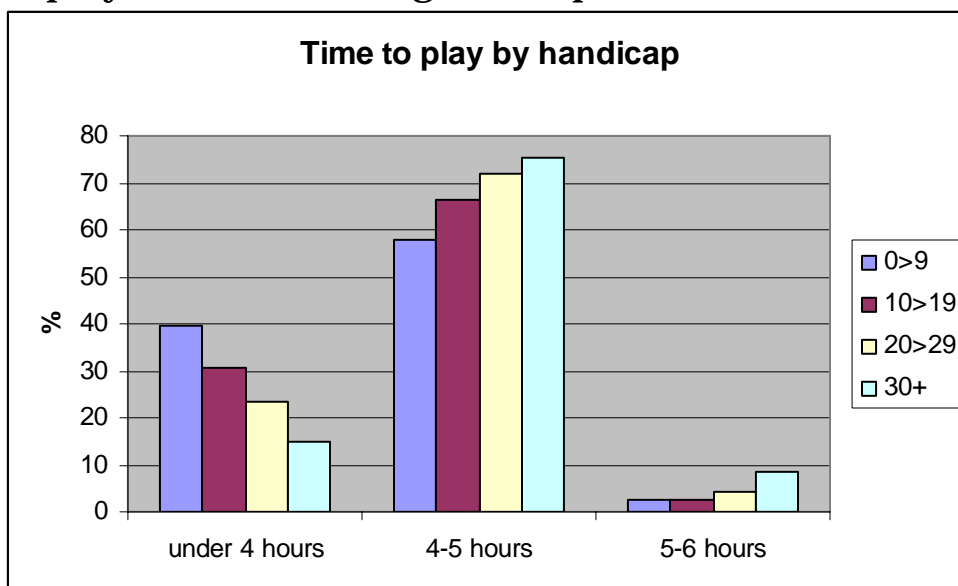
This information is very valuable because it gives us greater insight into why golfers play, and allows us to find out what is most important to those who participate.

## Time to play



Over 60% of our entire population of golfers tells us that it takes between 4-5 hours to play a round of golf.

When we break down the time to play, by handicap, we see that as golfers' handicaps increase, the distance they hit the ball decreases and the length of time to play 18 holes increases. Time to play 18 holes is not gender specific.



## **Estimated distances for various clubs.**

The male golfer who scores between 90 - 95 has been measured to hit his driver on average **192 yards** and the female (scoring between 95 - 100) hits her driver on average **145 yards**. (This information is based on actual test data from the study confirmed by data from a manufacturer's test site.)

However, our studies indicate that most golfers **overestimate** the distance they drive the ball by 30+ yards, with the lower handicap golfers overestimating distance by half the amount of the higher handicappers. Six irons and wedges are also overestimated but by about 12 and 6 yards respectively.

## **Estimated Driving Distance**

59% of males **estimate** they drive the ball between **180 yards and 249 yards**. And 41% **estimate they drive 250+ yards**.

71% of females estimate they drive the ball **less than 200 yards**.

**The Estimated Distances golfers claim to hit various clubs, sorted by Handicap, is as follows:**

*Note: The percentage in parentheses is the number of respondents estimating this distance range.*

**DRIVER**

<b><u>Handicap</u></b>	<b><u>Females</u></b>	<b><u>Males</u></b>
<b>0-9</b>	<b>200-240 (81.7%)</b>	<b>250 plus (70.2%)</b>
<b>10-19</b>	<b>170-230 (89.8%)</b>	<b>210-250 (86.3%)</b>
<b>20-29</b>	<b>140-220 (91.0%)</b>	<b>190-250 (89.4%)</b>
<b>30 plus</b>	<b>&lt;140-180 (86.9%)</b>	<b>180-250 plus (82.4%)</b>

**3-WOOD**

<b><u>Handicap</u></b>	<b><u>Females</u></b>	<b><u>Males</u></b>
<b>0-9</b>	<b>180-220 (85.7%)</b>	<b>210-230 plus (91.5%)</b>
<b>10-19</b>	<b>150-210 (87.4%)</b>	<b>190-230 plus (89.9%)</b>
<b>20-29</b>	<b>&lt;110-140 (87.6%)</b>	<b>170-230 plus (89.2%)</b>
<b>30 plus</b>	<b>&lt;110-140 (84.5%)</b>	<b>150-230 plus (86.0%)</b>

**6-IRON**

<b><u>Handicap</u></b>	<b><u>Females</u></b>	<b><u>Males</u></b>
<b>0-9</b>	<b>130-160 (90.5%)</b>	<b>150-180 plus (96.0%)</b>
<b>10-19</b>	<b>110-150 (88.7%)</b>	<b>140-180 plus (94.1%)</b>
<b>20-29</b>	<b>&lt;110-140 (87.6%)</b>	<b>130-170 (87.8%)</b>
<b>30 plus</b>	<b>&lt;110-140 (84.5%)</b>	<b>120-170 (83.1%)</b>

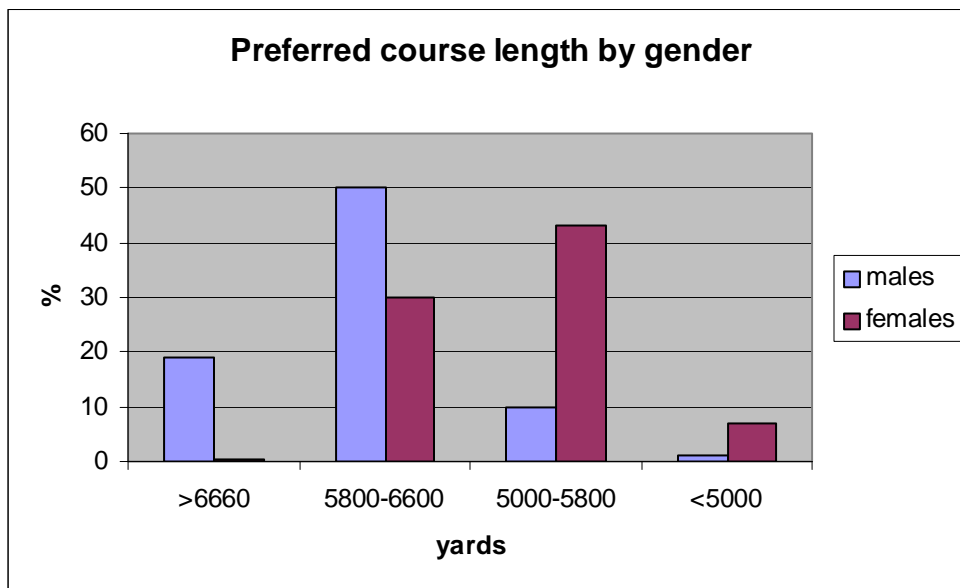
**WEDGE**

<b><u>Handicap</u></b>	<b><u>Females</u></b>	<b><u>Males</u></b>
<b>0-9</b>	<b>85-115 (87.0%)</b>	<b>105-125 plus (89%)</b>
<b>10-19</b>	<b>&lt;75-105 (93.8%)</b>	<b>85-125 (84.8%)</b>
<b>20-29</b>	<b>&lt;75-95 (90.0%)</b>	<b>&lt;75-115 (87.4%)</b>
<b>30 plus</b>	<b>&lt;75-85 (87.6%)</b>	<b>&lt;75-115 (87.5%)</b>

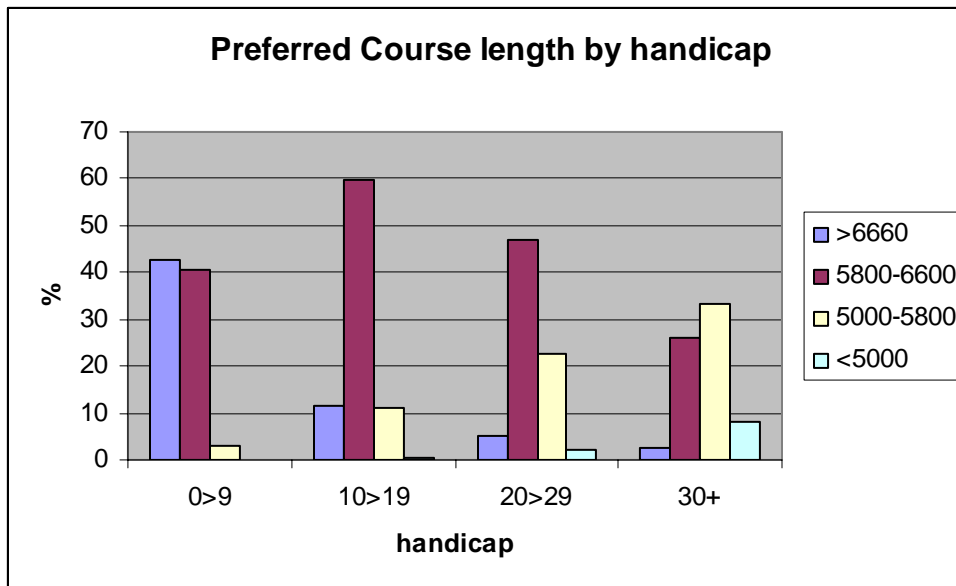
## Golf Course Preferences

*Note: In every answer to questions about the course the “No Preference” response has been from 9% to 25% ( e.g. 20% males and 19% females have no preference when it comes to course length and 0.2% didn’t answer). This trend of ‘no preference’ may be because they have not considered it or just don’t know*

### **Overall course length preference:**



Males prefer to play longer courses than females. When we examined course length preferences by handicap, we found that the preferred course length increases as the handicap decreases.



It is worth noting that even among the 0-9 handicap males, only 45% prefer to play 6,600+ yard courses. Also, 10% of females and 2% of males with 20+ handicaps prefer to play < 5,000-yard courses.

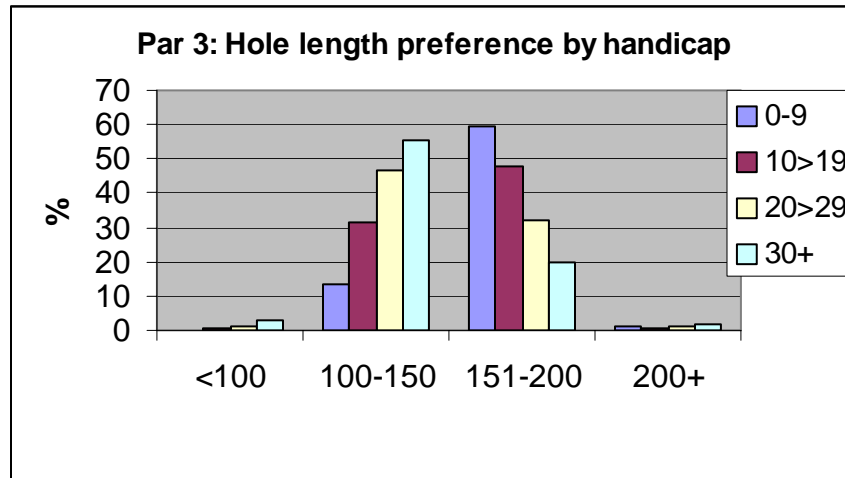
Those golfers who **estimate** they drive the ball <140 yards prefer to play courses less than 5,000 yards long. Of those who **estimate** they drive the ball 200 to 240 yards, 60% prefer to play 5,800 to 6,600 yard courses, and 14% of this 200-240 group prefer to play 5,000 to 5,800 yard courses.

It is worth noting that the female with an average handicap drives the ball approximately 145 yards. This would indicate that a large percentage of these golfers would prefer to play courses less than 5,000 yards long.

## Hole Lengths

The distance golfers hit the ball is related directly to the distance they prefer on Par 3s, 4s and 5s

### Par Threes

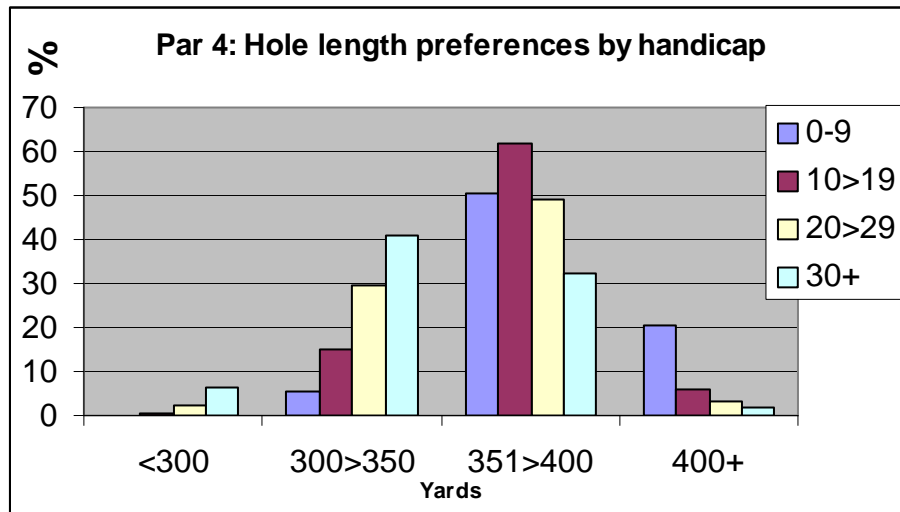


#### Interesting findings:

- Approximately 30% of males with an average national handicap (approx. 15) prefer par 3's less than 150 yards.
- Approximately 70% of females with an average national handicap (approx 28) prefer par 3s less than 150 yards.



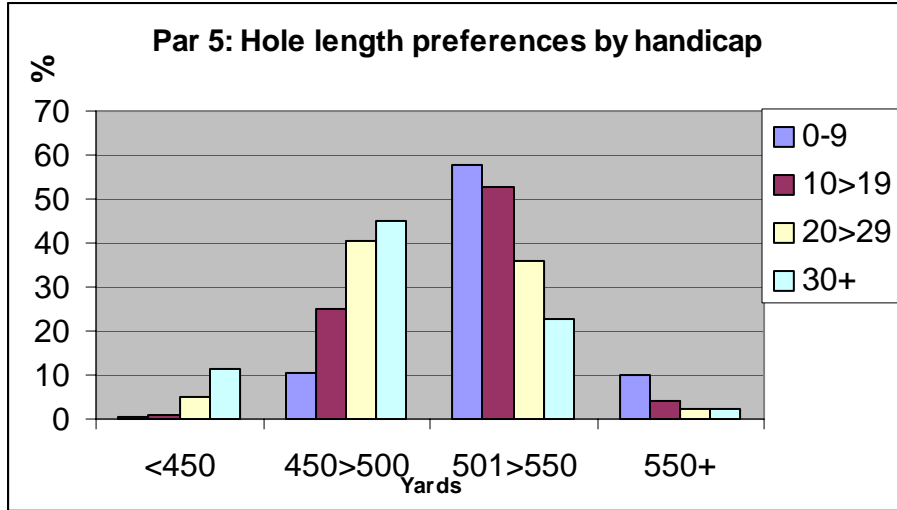
## Par Fours



### Interesting Findings:

- Approximately 76% of the average handicapped male prefers 300 to 400 yards on Par 4s with 21% of these males preferring 300-350 yard Par 4s.
- Approximately 50% of the national average handicap female prefers 300 to 350 yard par 4's

## Par Fives



### Interesting Findings:

- 78% of the average handicap males prefer to play par 5s between 450 and 550 with 44% of these preferring to par 5s between 450 and 500
- Approximately 68% of the average handicap females prefer to play par 5s less than 500 yards with about 43% of these preferring to play less than 450 yards.

## **Golf Course Configuration and Condition**

The survey asked questions about hazards (sand, water, waste bunkers, etc.) and on how many holes the respondents would like to have these. We also asked about preferred green speeds and undulations and size as well as fairway widths and undulations.

Respondents were asked about their preferred height of rough and the frequency of forced carries over hazards, marshes, or severe rough. The final question in this series was whether they preferred holes that are difficult, moderately difficult, or easy to par.

From these answers, course designs for the average **female respondent** and for the average **male respondent** have been composed.

It should be clearly noted that the female respondents have a larger percentage representation in the 0-19 handicap range than the national average and thus the preferences may be biased on the side of the better female golfer. The proposed course design reflects this.

*Note: In each case where information was requested regarding course configuration the No Preference response varied between 9% and 24%*

## **Course Design for the Average Male Respondent**

- The course should be approx. 6,490 yards long.
- The Par threes should average 160, Par fours 375, and the Par fives 525 yards long.
- The fairways should have gentle undulations and be medium in width.

- There should be Hazards (water, sand, grass bunkers and/or waste bunkers etc.) and trees on about 12 holes.
- The rough should be about 2.5 inches deep.
- Hazards (as above) should be in close proximity to 11 greens
- The greens should be medium in size and medium-to-fast, and gently undulating.

**For the average male golfer (approx handicap 15) the course length would be better set at 6,100 yards, but the other conditions would remain the same, except for a half-inch lower rough.**

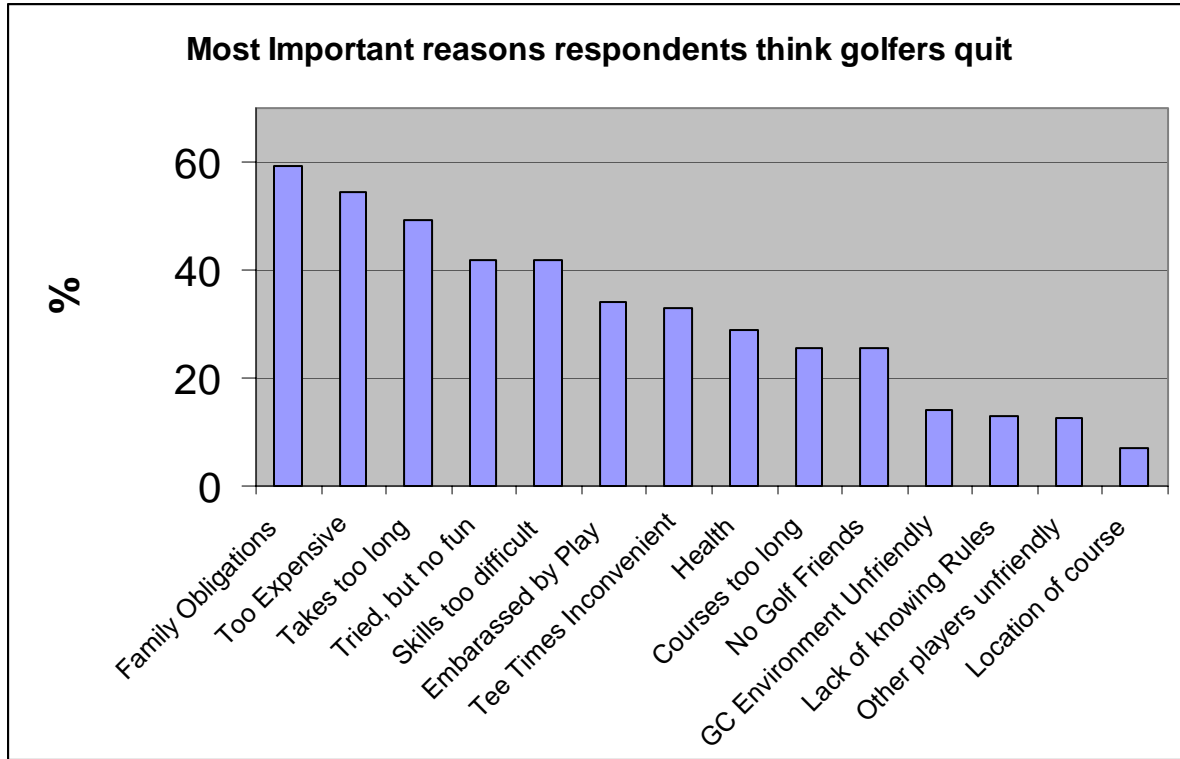
### **Course Design for the Average Female Respondent**

- The course should be 5,550 yards long.
- The Par threes should average 125, Par fours 325 and the Par fives 450 yards long.
- The fairways should have gentle undulations and be medium in width.
- There should be Hazards (water, sand, grass bunkers and/or waste bunkers etc.) and trees on about 10 holes.
- The rough should be about 2.0 inches deep.
- Hazards (as above) should be in close proximity to 9 greens.
- The greens should be of medium size and on the slow side of medium in speed with gentle undulations.

**The above generic designs describe the average female respondent with a lower than average handicap. For the average female golfer (approx handicap 28) the length should be reduced by about 550 yards to approx. 5,000. The Par 3s should be 100 yards; Par 4s 300 yards; and Par 5s approx. 400 yards. All the other conditions should remain about the same.**

# Why People Quit Playing Golf

*These are the “opinions” of the respondents, of whom 64% personally know someone who has quit playing golf.*



*The following reasons were identified as the “most,” “less” or “least” in importance as the reason for the decision to quit playing golf. The percentages below are from the “most” column and ranked accordingly.*

## Conclusions & Comment

From an analysis of these responses, this study confirms that the time and cost to play are major reasons why people quit playing golf.

The hitting of good shots and the “Personal Challenge” golf presents is fundamental to why people play. This combines with by-products such as being outdoors, exercise, and enjoying the

company of others to create the enjoyment of the overall experience.

This is reinforced when we ask respondents why they think people quit playing. Out of the top 6 reasons, 3 of these are directly related to lack of playing abilities and skill. This probably stems from the fact that golfers overestimate their abilities and are playing golf courses that are inappropriate for their skill level.

Most male golfers prefer to play courses between 5,800 and 6,600 yards long and most female golfers prefer to play courses between 5,000 to 5,800 yards long or shorter.

Most golf courses have been designed primarily for the scratch golfer, who represents only 0.55% of the golfing population; these designs have been compromised for the rest (99.45%) of the golfing population by merely shortening the length of the holes by moving the tees forward. This does work in some cases, but is a compromise and may not be sufficient to cater to the average golfer who is faced with greens with hazards designed to challenge the scratch golfer.

Golfers want to be challenged, but the challenge must be an appropriate one. **The ability to shoot par must be achievable**. Having a facility that caters to and is defined by what a golfer 'aspires to be', or once was, only leads to frustration and disappointment. It reduces the potential satisfaction and enjoyment that golfers should realize from participating in the game.

Establishing what will make the game more enjoyable for all skill levels and why golfers quit playing the game are among the primary objects of the study. We believe that some very basic and fundamental issues have been identified, and if addressed will set a new course for the game, allowing it to exhibit its potential.

The next phase of the study is to evaluate proposals by implementing them and researching where similar procedures

have been adopted. We will report the results as they develop, and the information will be available through an on-line clearinghouse at GrowingTheGame.org for all interested course operators, owners and others to use.

### **Future Research**

Phase II of the research will propose, test, and seek input on recommendations and distribute the results on an ongoing basis. Summaries and updates of reports will be made available on the Growing the Game website;

[www.growingthegame.org](http://www.growingthegame.org)

Frankly Consulting will alert those who sign up as a Frankly Friend whenever these updates are posted.

**Frankly Consulting LLC  
November 2005**

© Frankly Consulting LLC 2005



**FRANKLY**