

Pace of Play Global Survey



Pace of Play – Global Survey

Executive summary

As part of a broader ongoing project a survey was conducted in the six months from September 2014 until the start of March 2015 to gauge golfers' attitudes to pace of play. The survey was offered in Japanese, Chinese, Spanish, French, German and English to facilitate a broad range of responses. In total there were 56248 responses identified as coming from 122 countries.

For the purpose of this report countries are grouped together to form regions: Africa; Asia; Australasia; Continental Europe; Great Britain and Ireland (GB&I); Latin America and the Caribbean; and North America. The number of rounds played each year by the respondents would indicate that they are keen and active golfers (averaging approximately 2 rounds per week) and their demographic is generally representative of golfers in terms of gender and age. The sample also demonstrated the longevity of golf as a sport with the median response for years playing golf of around 20; with the exception of Continental Europe where this dropped to 11 years.

Whilst there were differences between age groups and genders these were not as marked as one might be led to think. For this reason the answers are generally broken down by region rather than by gender and age ranges.

The results of the survey indicated that playing in groups of four was most prolific, except within Continental Europe, where playing in groups of three was more popular. Results on types of play varied between regions. In Australasia, the amount of Stableford played (63%) and the amount of competition play (81%) were particularly noteworthy.

Respondents were asked how long they took to play 18 holes and the most common response was between 4.0 and 4.5 hours; except within GB&I where this dropped to 3.5 to 4.0 hours. They were also asked how long they took when they started playing and in general the times reported were comparable to those taken today. Weighted averages indicate that the average round time within GB&I is around 3:44, whereas the averages within other regions range from 3:54 (Continental Europe) to 4:09 (Australasia; and Latin America and the Caribbean).

Frequency of play

Respondents were asked which factors prevented them from playing more golf. Globally the two options yielding the highest level of response were Work Commitments and Family Commitments; although there was some variation for responses within age groups and by region. The time taken to play was next in the list as a factor when viewed globally. The factor of cost of play was cited as a reason for not playing more golf by respondents from Asia (28.5%) in particular, but not within GB&I (2.2%). Cost of equipment and difficulty of play were not given as reasons very frequently, although within golfers over 75 years old the proportion citing difficulty of play increased to 7.4%. Females cited alternative hobbies (17.7%) slightly more frequently than males (11.4%) as a factor preventing them from playing more golf.

Attitudes to pace of play

Respondents were asked if they were generally happy with the amount of time taken to play golf. The majority responded positively saying that they were always happy (4.3%) or happy most of the time (64.6%). The remainder of respondents were either sometimes happy (27.1%) or never happy (4.0%). Unsurprisingly those who were never happy generally took over 4.5 hours to play their golf.

Despite this positive outcome the majority of respondents said that playing in less time would improve their enjoyment of the game (60.1%). They were also asked to quantify the reduction in round time which would increase their frequency of play. Just over half of the respondents said that it would not make a difference, but around a quarter of them said that the round time would need to improve by 21 to 39 minutes per round (i.e. approximately 2 minutes per hole) to increase their frequency of play. This increased to 40 to 59 minutes per round (i.e. around 3 minutes per hole) for those who said that their typical round time was 5.0-5.5 hours.

It is interesting to focus on those who were less satisfied or in the extreme never satisfied with the pace of play; as this unsurprisingly leads to a different picture. The group that were never satisfied identify improvements between 21 and 59 minutes as possibly impacting their frequency of play. This is further exacerbated in golfers from 25-44, some of whom felt that the time taken to play would need to improve by between 1 and 1 ½ hours to increase their frequency of play. Realistically, such reductions in round times would be very difficult to achieve by improvements to pace of play alone.

Causes of issues with pace of play

At this stage this report is intended to describe the results of the survey rather than proffer solutions. In general respondents blamed other golfers for issues with pace of play, citing poor etiquette, bad play and players' pre-shot routines most frequently. Within North America the most frequently cited cause was players using tees which are too difficult for them; which indicates that the USGA "Tee It Forward" campaign is of particular relevance within that region or, at least, that the campaign's message has filtered through to golfers in North America.

Next stages

There are questions which solicited open-ended responses and one of the next stages is to review these comments. There are around 30,000 suggestions for what might improve pace of play and numerous other comments. A summary of some of the key points is included in this report, but this requires further work.

A conference will be held in St Andrews in late 2015 to discuss:

- pace of play and the three factors that influence pace of play (players, management of play and the course);
- the contents of this report; and
- the publication of a guidance document on possible measures to mitigate for pace of play issues.

Key points

This section simply gives the key points in bullet point form:

- The pace of play survey was offered in six languages and received over 56,000 responses from a combination of 122 countries.

- The survey focussed on player perceptions rather than other aspects of pace of play, such as management practices and course set-up.
- The majority of survey respondents were golfers who play once or twice per week. Therefore, the survey results reflect the views of regular golfers rather than addressing pace of play as it relates to the recruitment of new or lapsed golfers.
- The majority of respondents were happy with the amount of time they take to play golf; however, an even larger majority stated that they would enjoy their golf more if it took less time.
- Considering the entire group one in four said that improvements of between 21 and 39 minutes per round might encourage them to play more frequently, but over half of the respondents said that reducing round times would not impact their frequency of play.
- Focussing on golfers who were not satisfied with the pace of play they identified improvements of between 21 and 59 minutes as influencing their frequency of play.
- One in five of the golfers who were never satisfied with the pace of play aged between 25 and 44 identified an improvement of between 1 and 1 ½ hours being necessary to increase their frequency of play.
- Work and family commitments were, respectively, the top two reasons for preventing respondents from playing more golf. Time taken to play was the third most cited reason.
- Respondents most commonly cited player behaviour (e.g. poor etiquette, lengthy pre-shot routines, bad play) as the reason for pace of play problems. Management issues (e.g. short starting intervals, four-balls from early in the day) and course issues (e.g. course difficulty, course length, severe rough) are perceived by respondents to be less significant.
- Most respondents play in groups of three or four players, with the latter being dominant in certain regions.
- The majority of respondents prefer to play in the morning, which suggests that courses are less busy in the afternoons and evenings.
- There does not appear to have been an increase in round times when comparing round times today with round times when respondents started to play golf.
- The vast majority of golfers prefer to play 18 holes but a significant proportion of respondents said that they would welcome more opportunities to play 9 holes.

Table of Contents

Pace of Play – Global Survey.....	1
Executive summary	1
Frequency of play	1
Attitudes to pace of play.....	2
Causes of issues with pace of play.....	2
Next stages	2
Key points	2
List of tables	4
Survey Background	5
Demographic breakdown of respondents.....	6

Forms of Play	11
Comments on time taken to play	16
Factors influencing frequency of play	19
Attitudes to pace of play	21
Focussing on those who were less satisfied	23
The effect of the pace of play	24
Those who take more than 4.5 hours to play	27
Additional comments made by respondents	28
List of questions	29
List of countries in regions	33

List of tables

Table 1 Overall breakdown of responses and percentage (%) breakdown by region (derived from Question 5).	6
Table 2 Countries with more than 400 responses (Question 5).	7
Table 3 Numbers of responses by gender and region, including percentage breakdown (Question 1).	7
Table 4 Numbers of respondents indicating that they have an official handicap (Question 2).	8
Table 5 Percentage divisions within self-reported handicap ranges (Question 3).	8
Table 6 Percentage of those in handicap ranges of each gender (Questions 1 and 3).	9
Table 7 Types of golf course (Question 6).	9
Table 8 Age ranges of respondents (Question 7).	10
Table 9 Number of years playing golf (Bands generated from Question 8).	10
Table 10 Median and modes for the number of years playing golf (Statistics from Question 8).	11
Table 11 Items used by respondents during their rounds (Question 9).	11
Table 12 Times at which respondents typically tee off (Question 10).	12
Table 13 Respondents normal form of play (Question 11).	12
Table 14 Respondents were asked if they played four-ball better ball and if so, whether they played Match Play or Stroke Play (Question 12).	13
Table 15 Number of players normally in respondents' groups (in favoured form of play) (Question 13).	13
Table 16 Statistics associated with the number of golfers in groups (Statistics from Question 13). ..	14
Table 17 Number of rounds played per year (Statistics from Question 14).	14
Table 18 Statistics for number of rounds by age category (Statistics from the combination of Question 7 and Question 14).	15
Table 19 Division in play in terms of types of play (Question 15).	15
Table 20 Preferred number of holes (Question 16).	15

Table 21 Respondents were asked if they stopped for a snack during their round (for instance at a halfway house) (Question 17).....	16
Table 22 Respondents were asked if they used a distance measuring device (Question 18).....	16
Table 23 Breakdown of time typically taken to play a full round of golf (18 holes) (Question 20).....	17
Table 24 Breakdown for time taken to play a full round of golf (18 holes) when respondents started playing golf (Question 21).....	17
Table 25 Mean rounds time now and when respondents started playing (Statistics generated from Question 20 and Question 21).....	18
Table 26 Breakdown of round times by forms of play (Question 11 and Question 20).....	18
Table 27 Factors preventing respondents from playing more golf (Question 19).....	19
Table 28 Factors preventing respondents from playing more golf broken down by age ranges (Question 19 and Question 7).....	20
Table 29 Factors influencing frequency of play broken down by gender (Question 19 and Question 1).....	21
Table 30 Respondents were asked whether they were happy with the amount of time it takes to play (Question 22).....	21
Table 31 Breakdown of levels of happiness with the time taken to play by reported playing times (Question 22 and Question 20).....	22
Table 32 Comparison of levels of happiness with pace of play between respondents depending on whether they are club members or not (Question 22 and Question 6).....	22
Table 33 Cross tabulation for respondents' levels of satisfaction and the level of improvement in round time necessary to affect their frequency of play (Questions 22 and 24).....	23
Table 34 Cross tabulation for respondents' levels of satisfaction (aged 25-44) and level of improvement in round time necessary to affect their frequency of play (Questions 22 and 24).....	23
Table 35 Respondents were asked whether playing in less time would improve their enjoyment of the game (Question 23).....	24
Table 36 Respondents were asked how much shorter their rounds would have to be to increase their frequency of play (Question 24).....	24
Table 37 Cross tabulation of round times and potential for increase on frequency of play via a reduction in playing time (Question 20 and Question 24).....	25
Table 38 Respondents were asked which options they agreed with (Question 25).....	26
Table 39 Ranks for reasons cited for causing issues with pace of play during the round (Question 26).....	26

Survey Background

The survey was conducted on SurveyMonkey from September 2014 to March 2015, in English, German, Spanish, French, Japanese and Chinese. The survey has been promoted with help from The R&A's Affiliates. In some cases Affiliates had databases of email addresses for golfers which enhanced the take up within these individual countries. We would like to register our thanks to those who helped to translate the survey and also promote it.

Some of the questions sought open responses and some of these have been reviewed. An indicative summary is contained herein. The main focus of this report will be the closed responses (and

numerical data). There are 56248 responses but not all the questions required a response, as such the total numbers for individual questions will not necessarily match this figure.

In order to analyse potential differences between areas the results of the survey have been broken down into geographical areas, namely: Africa (323); Asia (3339); Australasia (11601); Continental Europe (10165); GB&I (19228); Latin America and the Caribbean (647) and North America (9097). Some additional analysis has been done within individual countries but that is not promoted herein. Those requiring more details or with questions should address these to Dr Steve Otto, steveotto@randa.org.

Demographic breakdown of respondents

This section covers the demographics of those having responded to the survey. In some cases the actual numbers are included, but in the majority of tables the percentages of those responding or of the total number of responses will be given.

It is worth reinforcing that whilst it is hoped that the sample is representative of the population of golfers no representation is made that these demographics reflect the current situation within any of these geographical areas. It is also noted that there is an imbalance between the numbers from different areas, but it was felt important to include the division into these areas. The majority of comments herein will be made within regions rather than looking at the overall global figure since it is conceded that this may be skewed to areas with larger responses.

Table 1 Overall breakdown of responses and percentage (%) breakdown by region (derived from Question 5).

Regions	Count	Percentages
AFRICA	323	0.6%
ASIA	3339	6.1%
AUSTRALASIA	11601	21.3%
CONTINENTAL EUROPE	10165	18.7%
GB&I	19228	35.3%
LATIN AMERICA AND CAR.	647	1.2%
NORTH AMERICA	9097	16.7%
Total	54400	

In Table 1 details of the numbers of responses received from each geographic region are reported. It is noted that there are vastly disparate numbers but it was felt to be important to group golfers from these regions rather than using artificial areas with comparable numbers. There were 1848 responses where the country/region was not determined. The division of regions selected herein are slightly different from those reported within the report "Golf around the World 2015"¹, but nevertheless this forms an interesting point for comparison. In the Golf around the World report the percentage division of golf facilities by region is given as Africa (3%); Asia (14%); Oceania (6%); Europe (22%); North America (including Central America and the Caribbean) (53%) and South America (2%). This would indicate that the respondents to this current survey over represent golfers within Oceania and Europe. Although when this is adjusted to reflect The R&A's jurisdiction,

¹ Golf around the world 2015: National Golf Foundation report concerning the construction of a database of all the world's golf facilities. Available from www.randa.org.

that is excluding the USA and Mexico, there is a closer match (although still over representation from Oceania and under representation from Asia).

As mentioned above, this report does not include results divided into countries, but it is worth noting that 16 countries had over 400 responses (listed in Table 2). In total, responses were received from golfers identifying themselves as residing in 122 countries; although 70 of these countries had less than 10 respondents

Table 2 Countries with more than 400 responses (Question 5).

Country	Count
ENGLAND	11388
AUSTRALIA	11294
CANADA	7561
SCOTLAND	3277
IRELAND	2840
FRANCE	2782
GERMANY	2469
JAPAN	2106
USA	1536
SPAIN	1222
SWEDEN	680
ITALY	614
NETHERLANDS	562
NORTHERN IRELAND	495
CZECH REPUBLIC	487
BELGIUM	444

In Table 3 we give details of the numbers of respondents broken down by gender. In these initial tables, values are included for responses which did not include the identification of the person's country and consequently it was not possible to determine their region. For instance, in Table 3 we have $296+1111+441 = 1848$ responses with no country and 735 responses who did not indicate their gender. The gender division in the global survey of 17.4% to 82.6% is not vastly disparate from other indications of the division of golfers in terms of gender. For instance, data on the European Golf Association website suggest a division of 15%/85% within England.²

There are 441 responses who failed to indicate their region/country and their gender. This information is included at the outset so that it can be appreciated that not all responses were completed. It is further noted that all responses contained some information and any fully blank responses have been discarded.

Table 3 Numbers of responses by gender and region, including percentage breakdown (Question 1).

	Female	Male	Blank	Total (Female /Male)	Female (%)	Male (%)

² Statistics for numbers of golfers 2015 (<http://www.ega-golf.ch/050000/050100.asp>)

AFRICA	42	278	3	320	13.1%	86.9%
ASIA	387	2941	11	3328	11.6%	88.4%
AUSTRALASIA	1933	9608	60	11541	16.7%	83.3%
CONTINENTAL EUROPE	1420	8692	53	10112	14.0%	86.0%
GB&I	4071	15047	110	19118	21.3%	78.7%
LATIN AMERICA AND CAR.	78	566	3	644	12.1%	87.9%
NORTH AMERICA	1466	7577	54	9043	16.2%	83.8%
Blank	296	1111	441			
All	9397	44709		54106	17.4%	82.6%

In Table 4 we give details of the number of respondents who indicated that they have an official handicap. This figure is perhaps higher than might be expected for the general golfing population indicating a bias in the sample towards regular golfers. It should be noted that the responses from Asia included proportionally more golfers without handicaps.

Table 4 Numbers of respondents indicating that they have an official handicap (Question 2).

	No	Yes	Total (No/Yes)	No(%)	Yes(%)
AFRICA	14	307	321	4.4%	95.6%
ASIA	977	2348	3325	29.4%	70.6%
AUSTRALASIA	187	11344	11531	1.6%	98.4%
CONTINENTAL EUROPE	268	9826	10094	2.7%	97.3%
GB&I	737	18339	19076	3.9%	96.1%
LATIN AMERICA AND CAR.	65	579	644	10.1%	89.9%
NORTH AMERICA	971	8066	9037	10.7%	89.3%
All	3219	50809	54028	6.0%	94.0%

Table 5 Percentage divisions within self-reported handicap ranges (Question 3).

	Better than scratch	0-5	6-12	13-20	21-28	29 and above
AFRICA	2.2%	8.2%	28.8%	40.1%	17.9%	2.8%
ASIA	2.3%	16.3%	32.4%	31.1%	12.3%	5.5%
AUSTRALASIA	0.5%	5.8%	25.3%	40.4%	21.5%	6.5%
CONTINENTAL EUROPE	2.7%	12.8%	27.3%	31.8%	15.2%	10.3%
GB&I	0.7%	7.6%	27.6%	40.2%	19.1%	4.7%
LATIN AMERICA AND CAR.	2.6%	15.0%	26.0%	31.8%	18.3%	6.2%
NORTH AMERICA	1.3%	9.5%	31.1%	38.3%	15.0%	4.8%
All	1.3%	9.1%	27.9%	37.7%	17.8%	6.2%

In Table 5 we give the percentage breakdown by handicap ranges within each region. As might be anticipated we find that the majority of respondents had handicaps between 6 and 20 (over 58% for all regions). There is a higher proportion of golfers reporting having a handicap above 29 in Continental Europe, perhaps reflecting the maximum allowable handicap within the European Golf Association's handicap system.

In Table 6 the percentage breakdown of each handicap range into genders is given. It is noted that the breakdown is biased towards lower handicaps for males than females (percentages above the gender division for each group for handicaps less than 20).

Table 6 Percentage of those in handicap ranges of each gender (Questions 1 and 3).

	Better than scratch	0-5	6-12	13-20	21-28	29 and above	All
Female	12.3%	9.1%	9.3%	14.8%	28.5%	50.9%	17.4%
Male	87.7%	90.9%	90.7%	85.2%	71.5%	49.1%	82.6%

It was felt important to determine the type of golfer answering the questions to see whether this had an impact on the response. Responses to the survey were dominated by those identifying themselves as playing at members' clubs. It is recognised that this can include slightly different facilities in various countries. As far as possible the questions were kept the same in all languages however where the questions required further clarification there were slight modifications made. For instance, within the Japanese survey respondents denoted whether they played at a members' club as a member (63%) or as a visitor (27%). In most regions responses were dominated by those from members' clubs, although this dropped within Continental Europe (57.3%) and North America (65.5%).

Table 7 Types of golf course (Question 6).

	Members' club	Pay and play	Proprietary	Resort
AFRICA	90.7%	3.4%	3.4%	2.5%
ASIA	75.8%	16.7%	5.1%	2.4%
AUSTRALASIA	89.8%	5.3%	3.5%	1.4%
CONTINENTAL EUROPE	57.3%	16.2%	23.0%	3.5%
GB&I	83.6%	2.2%	12.6%	1.7%
LATIN AMERICA AND CAR.	82.0%	12.0%	3.7%	2.3%
NORTH AMERICA	65.5%	22.7%	10.3%	1.5%
All	76.5%	9.9%	11.6%	2.0%

In Table 8 the segmentation of respondents into age ranges are given. Again it should be noted that this is intended to report on the demographics of those responding rather than to make any representation of golfers within these regions. The range with the highest number of respondents from each region is denoted in red and in every case this is either 45-54 or 55-64. In all regions roughly 50% of the respondents identify themselves as being between 45 and 64.

Table 8 Age ranges of respondents (Question 7).

	Under 12	12 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 to 74	75 or older
AFRICA	0.0%	0.3%	1.2%	9.3%	18.6%	26.7%	26.1%	15.2%	2.5%
ASIA	0.2%	1.0%	4.8%	8.8%	19.3%	30.9%	22.8%	10.5%	1.7%
AUSTRALASIA	0.0%	0.4%	0.6%	3.5%	8.8%	18.4%	31.8%	30.3%	6.1%
CONTINENTAL EUROPE	0.1%	2.6%	5.0%	10.3%	19.3%	26.0%	21.2%	13.7%	1.7%
GB&I	0.0%	0.7%	1.5%	4.7%	9.8%	20.1%	29.6%	27.6%	6.1%
LATIN AMERICA AND CAR.	0.6%	3.4%	2.2%	9.7%	16.2%	22.4%	27.0%	14.8%	3.6%
NORTH AMERICA	0.0%	0.5%	1.0%	4.0%	6.7%	15.2%	34.5%	31.1%	6.9%
ALL	0.1%	1.0%	2.1%	5.7%	11.5%	20.8%	28.8%	24.9%	5.1%

In addition to players' ages they were also asked to comment on how many years they had been playing golf (Table 9 and Table 10). The respondents gave estimates of the number of years, but for the purpose of reporting the responses were broken into ranges. It should be noted that the longevity of golf is evident by noting that over 8000 of the respondents claimed to have been playing golf for more than 40 years, with just less than 3000 playing for over 50 years. In Table 10 values are given for the medians and modes for respondents from the regions.

Table 9 Number of years playing golf (Bands generated from Question 8).

	<=5	<=10	<=20	>20
AFRICA	13.4%	19.6%	23.4%	43.6%
ASIA	16.6%	13.8%	25.5%	44.2%
AUSTRALASIA	7.6%	10.7%	21.9%	59.8%
CONTINENTAL EUROPE	21.6%	25.0%	31.0%	22.5%
GB&I	7.5%	11.4%	24.9%	56.2%
LATIN AMERICA AND CAR.	13.6%	16.1%	26.4%	43.8%
NORTH AMERICA	2.9%	6.9%	20.2%	70.1%
ALL	9.9%	13.3%	24.6%	52.2%

It is worth noting that the proportion of those playing less than 5 years is higher within the respondents from Continental Europe (21.6%). Further evidence of this can be seen in Table 10 with a substantial reduction in both the median and mode. There are other individual countries with lower values, for instance in China the median was 8 years and the mode was only 2 years.

Table 10 Median and modes for the number of years playing golf (Statistics from Question 8)³.

	Median	Mode	N for mode
AFRICA	20	30	20
ASIA	19	20	157
AUSTRALASIA	26	30	1196
CONTINENTAL EUROPE	11	10	676
GB&I	25	20	1897
LATIN AMERICA AND CAR.	20	30	47
NORTH AMERICA	30	40	903

Forms of Play

At this stage of the report no comments are made on the impact of factors on the pace of play, however it was felt useful to gather information on how respondents generally play golf and how they transported themselves and their clubs around the course. In Table 11 information is given on the responses to this question. It is worth noting that additional options were added to the Japanese survey to match with general practice, however these responses were grouped back together for this global report. The most frequent answers (or modal responses) within each region are highlighted. It is interesting to note the propensity of use of power trolleys for the GB&I region respondents, especially when contrasted with other regions. It is noted that a higher proportion of respondents from Asia used golf carts than in any other region.

Table 11 Items used by respondents during their rounds (Question 9).

	Carry bag	Caddie	Golf cart	Power trolley	Pull trolley
AFRICA	7.4%	52.3%	9.6%	7.7%	22.9%
ASIA	1.9%	33.6%	57.0%	1.9%	5.7%
AUSTRALASIA	2.1%	0.1%	19.7%	24.7%	53.5%
CONTINENTAL EUROPE	16.1%	0.2%	6.5%	26.4%	50.7%
GB&I	13.1%	0.2%	2.2%	61.8%	22.7%
LATIN AMERICA AND CAR.	12.2%	40.8%	24.4%	7.6%	15.0%
NORTH AMERICA	11.4%	0.8%	33.8%	7.7%	46.3%
All	10.3%	3.1%	15.7%	33.5%	37.3%

³ As a reminder of the definitions of the averages used in this report. The mean is calculated as the sum of the results divided by the number of them. The median is the response in the half way through the results when they are arranged in ascending order. The mode is the most frequent response, this is usually accompanied with the number of respondents giving this answer.

In Table 12 percentage breakdowns for when respondents generally tee off are given. Additional comments made by Japanese respondents indicated that the tendency towards teeing off mid-morning could be associated with the time taken to travel to the golf course; however this was considered to be beyond the remit of this study. Otherwise, in general, early morning tee times seem to be the preference, although within the responses from Continental Europe there was a more even split. It is particularly interesting to note the apparent reduction in usage for facilities later in the day. This would seem to indicate that courses are less busy in the afternoons and evenings.

Table 12 Times at which respondents typically tee off (Question 10).

	Early Morning	Mid Morning	Midday	Mid Afternoon	Evening	No preference
AFRICA	36.4%	9.6%	30.7%	10.7%	1.4%	11.1%
ASIA	24.3%	55.0%	7.0%	4.1%	0.8%	8.8%
AUSTRALASIA	46.4%	23.0%	22.2%	1.1%	0.1%	7.1%
CONTINENTAL EUROPE	20.9%	24.0%	11.0%	13.4%	3.5%	27.2%
GB&I	39.5%	29.1%	10.3%	4.7%	0.9%	15.5%
LATIN AMERICA AND CAR.	57.8%	14.3%	9.1%	4.6%	1.3%	12.8%
NORTH AMERICA	34.0%	30.6%	10.1%	7.8%	1.4%	16.1%
All	36.0%	28.2%	13.0%	6.1%	1.3%	15.5%

The favoured form of play for respondents is reported on in Table 13. It is worth pausing at this stage and highlighting the favoured form of play within each region:

- Africa (Stableford 47.0%)
- Asia (Stroke Play 81%)
- Australasia (Stableford 63.3%)
- Continental Europe (Stableford 36.8%, Stroke Play 37.7%)
- Latin America and the Caribbean (Stroke Play 62%) and
- North America (Stroke Play 74.5%).

The picture within GB&I is less clear with Stableford highest but with a third of respondents answering “Mixture”. It is also interesting to note the low level of play for respondents using Stableford in North America (0.9%) and Asia (1.8%). A slight caveat should be raised on the apparent propensity within North America for Foursomes play; it has been mooted that there has been some misunderstanding of what was meant by Foursomes. In addition respondents were asked if they played four-ball better ball and, if they did, whether they tended to play Match Play or Stroke Play (see Table 14).

Table 13 Respondents normal form of play (Question 11).

	Foursomes	Match Play	Mixture	Stableford	Stroke Play
AFRICA	1.1%	5.4%	21.5%	47.0%	25.1%
ASIA	3.3%	7.6%	6.3%	1.8%	81.0%
AUSTRALASIA	0.2%	0.3%	27.9%	63.3%	8.3%

CONTINENTAL EUROPE	0.2%	6.6%	18.6%	36.8%	37.7%
GB&I	0.9%	8.3%	33.2%	36.0%	21.6%
LATIN AMERICA AND CAR.	10.9%	12.4%	10.7%	4.1%	62.0%
NORTH AMERICA	10.5%	4.7%	9.4%	0.9%	74.5%
All	2.5%	5.6%	23.5%	34.0%	34.4%

Table 14 Respondents were asked if they played four-ball better ball and if so, whether they played Match Play or Stroke Play (Question 12).

	I don't play four-ball better ball	Yes - Match Play	Yes - Stroke Play
AFRICA	17.3%	43.0%	39.7%
ASIA	47.1%	18.0%	34.9%
AUSTRALASIA	29.5%	12.7%	57.7%
CONTINENTAL EUROPE	36.8%	37.1%	26.1%
GB&I	23.4%	50.6%	26.0%
LATIN AMERICA AND CAR.	49.7%	28.7%	21.6%
NORTH AMERICA	58.3%	20.6%	21.1%
ALL	34.7%	32.7%	32.6%

There was a question asking for respondents to say how many golfers were generally in their group in their favoured form of play. In Table 15 the percentage breakdown for each group size from 1 to 4 is given. It is noted that there was also a small number of respondents (201) who came back with responses of 5 or 6 (in roughly equal numbers). In Table 16 statistics are given for the number of golfers within each group. The mean, median and modes are given, together with the number of respondents for the mode.

Table 15 Number of players normally in respondents' groups (in favoured form of play) (Question 13).

	1	2	3	4
AFRICA	0.4%	4.5%	9.5%	85.6%
ASIA	1.4%	4.2%	11.9%	82.4%
AUSTRALASIA	0.1%	1.3%	8.0%	90.6%
CONTINENTAL EUROPE	1.6%	17.1%	41.4%	39.9%
GB&I	0.3%	10.7%	39.0%	50.0%
LATIN AMERICA AND CAR.	0.4%	7.8%	18.2%	73.5%
NORTH AMERICA	0.9%	8.4%	8.7%	82.1%

All	0.7%	9.0%	25.4%	64.9%
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It is noted that the lowest mean value occurs for respondents from Continental Europe and in fact this is the only region which has a median and mode of 3. The final column gives the number of respondents who answered with the mode. It is worth noting respondents within Australasia responded with the mode of 4, 81.6% of the time. The propensity for playing in a group of four is further evidenced by noting that the mean number of players in a group in this region is 3.89.

Table 16 Statistics associated with the number of golfers in groups (Statistics from Question 13).

	Total responses	Mean	Median	Mode	N for Mode
AFRICA	323	3.80	4	4	208
ASIA	3339	3.76	4	4	1999
AUSTRALASIA	11601	3.89	4	4	9461
CONTINENTAL EUROPE	10165	3.20	3	3	3653
GB&I	19228	3.40	4	4	7800
LATIN AMERICA AND CAR.	647	3.70	4	4	339
NORTH AMERICA	9097	3.73	4	4	6440
ALL	56248	3.55	4	4	30144

Respondents were asked to indicate the number of rounds they played per year. The statistics associated with these responses are summarised in Table 17. The modal response within Africa; Australasia; GB&I; and Latin America and the Caribbean equated to roughly two rounds per week, whilst in Continental Europe and North America the modal response equated to roughly playing once per week. The lowest level of play was indicated by respondents from Asia (roughly once every two weeks).

Table 17 Number of rounds played per year (Statistics from Question 14).

	Total responses	Mean	Median	Mode	N for Mode
AFRICA	323	71.8	60	100	35
ASIA	3339	46.8	40	30	304
AUSTRALASIA	11601	79.2	75	100	1789
CONTINENTAL EUROPE	10165	64.0	50	50	1098
GB&I	19228	84.8	80	100	2992
LATIN AMERICA AND CAR.	647	73.1	60	100	77
NORTH AMERICA	9097	66.2	60	50	989
ALL	56248	74.2	60	100	7016

Data is also included for number of rounds played broken down by age category. As might be expected the lowest means and medians are in the age range 25 to 45 years.

Table 18 Statistics for number of rounds by age category (Statistics from the combination of Question 7 and Question 14).

Age	Mean	Median	Mode	N for mode
Under 12	77.9	60	100	3
12 to 17	83.2	70	100	75
18 to 24	68.6	50	50	111
25 to 34	51.4	40	50	343
35 to 44	51.6	44	50	709
45 to 54	62.4	50	50	1390
55 to 64	79.3	70	100	2276
65 to 74	92.9	100	100	2317
75 or older	87.7	90	100	413

In addition to the numbers of rounds, the survey also included a question which asked respondents to estimate the percentage division between Social (but competitive), Social (fun) and Competition (club or similar). The data in Table 19 are the mean percentages for each type of play. It should be noted that they are the means of the percentage divisions and as such they will not necessarily add up to 100%. The most interesting observations are the amount of competition play identified in Australasia (80.8%) and the contrasting figure in North America (16.9%).

Table 19 Division in play in terms of types of play (Question 15)

	Social (but competitive)	Social (Fun)	Competition (club or similar)
AFRICA	39.4%	22.8%	51.9%
ASIA	35.7%	47.3%	28.4%
AUSTRALASIA	18.9%	14.0%	80.8%
CONTINENTAL EUROPE	44.0%	37.3%	32.0%
GB&I	42.6%	26.6%	43.7%
LATIN AMERICA AND CAR.	51.0%	41.9%	25.6%
NORTH AMERICA	53.0%	47.5%	16.9%

Respondents were asked for their preferred number of holes when playing, see Table 20. The overwhelming preference was to play 18 holes. The only region in which this dropped below 90% was Continental Europe, where over 1 in 7 of the respondents said that they preferred to play 9 holes.

Table 20 Preferred number of holes (Question 16).

	4 holes	6 holes	9 holes	12 holes	18 holes
AFRICA	0.7%	0.0%	2.5%	0.4%	96.4%
ASIA	1.3%	0.7%	5.1%	1.3%	91.7%
AUSTRALASIA	0.9%	0.9%	2.3%	0.7%	95.2%

CONTINENTAL EUROPE	0.9%	0.7%	15.2%	3.0%	80.2%
GB&I	0.9%	0.6%	3.1%	1.6%	93.7%
LATIN AMERICA AND CAR.	1.1%	0.4%	5.3%	0.4%	92.8%
NORTH AMERICA	0.7%	0.5%	5.5%	0.6%	92.7%
ALL	0.9%	0.7%	5.7%	1.5%	91.3%

It was felt that it would be useful to explore whether respondents tended to stop for refreshment during their rounds (Table 21). Within Africa (78.9%); Asia (58.0%); and Latin America and the Caribbean (57.5%) this was more prevalent than within the other regions.

Table 21 Respondents were asked if they stopped for a snack during their round (for instance at a halfway house) (Question 17).

	No	Sometimes	Yes
AFRICA	9.8%	11.3%	78.9%
ASIA	21.8%	20.2%	58.0%
AUSTRALASIA	57.9%	22.0%	20.1%
CONTINENTAL EUROPE	71.7%	19.2%	9.1%
GB&I	75.6%	17.1%	7.3%
LATIN AMERICA AND CAR.	23.0%	19.5%	57.5%
NORTH AMERICA	50.9%	29.5%	19.6%
ALL	62.8%	20.9%	16.3%

Respondents were also asked if they used a distance measurement device (Table 22). There is clearly a difference in usage in different regions with Africa; Asia; and Latin America and the Caribbean answering No (in the majority) and respondents from the other regions answering in the affirmative. There may be an association here with the enhanced usage of caddies and golf carts within Africa; Asia; and Latin America and the Caribbean (see Table 11).

Table 22 Respondents were asked if they used a distance measuring device (Question 18).

	No	Sometimes	Yes
AFRICA	70.3%	5.7%	24.0%
ASIA	64.4%	16.7%	18.8%
AUSTRALASIA	30.1%	10.5%	59.4%
CONTINENTAL EUROPE	32.3%	9.6%	58.1%
GB&I	38.3%	8.2%	53.5%
LATIN AMERICA AND CAR.	54.9%	13.5%	31.7%
NORTH AMERICA	27.2%	12.1%	60.7%
ALL	35.2%	10.1%	54.7%

Comments on time taken to play

Respondents were asked how long they took to play 18 holes in their favoured form of play. This breakdown is given in Table 23. The most frequent answer is highlighted in red for each region. As

can be seen it is only within GB&I that respondents suggested that the modal response was 3.5-4.0 hours.

Table 23 Breakdown of time typically taken to play a full round of golf (18 holes) (Question 20).

	2.0-2.5	2.5-3.0	3.0-3.5	3.5-4.0	4.0-4.5	4.5-5.0	5.0-5.5	>5.5
AFRICA	1.8%	3.6%	5.4%	18.1%	48.6%	19.9%	1.8%	0.7%
ASIA	9.6%	2.5%	4.6%	18.0%	36.0%	20.0%	6.5%	2.8%
AUSTRALASIA	0.3%	0.7%	4.0%	21.3%	60.3%	12.7%	0.8%	0.1%
CONTINENTAL EUROPE	1.5%	3.6%	14.1%	34.1%	36.1%	9.2%	1.4%	0.1%
GB&I	0.3%	3.0%	22.5%	47.8%	24.4%	1.9%	0.1%	0.0%
LATIN AMERICA AND CAR.	1.3%	2.4%	7.4%	24.9%	38.3%	21.1%	3.6%	1.1%
NORTH AMERICA	0.4%	1.8%	9.7%	34.6%	46.7%	6.1%	0.6%	0.1%
ALL	1.0%	2.3%	13.5%	35.2%	39.2%	7.6%	1.0%	0.2%

It is often conjectured that golf used to take less time. For this reason, respondents were asked whether they thought they played in less time when they started playing golf. This question received the most criticism from respondents due to the lack of the option for “do not remember”. The breakdowns are given in Table 24. Again the most frequent response is highlighted in red and the modal responses remain the same in all regions compared with Table 23. It should be noted that there are many additional comments concerning the additional time taken to play as a beginner and this question may have been interpreted in that way rather than merely when they were younger. Nevertheless it is interesting that, in the main, respondents do not perceive that the time taken to play golf has increased dramatically since they first played.

Table 24 Breakdown for time taken to play a full round of golf (18 holes) when respondents started playing golf (Question 21).

	2.0-2.5	2.5-3.0	3.0-3.5	3.5-4.0	4.0-4.5	4.5-5.0	5.0-5.5	>5.5
AFRICA	0.4%	5.8%	6.5%	27.9%	29.0%	21.7%	7.2%	1.4%
ASIA	6.2%	6.0%	5.1%	11.5%	31.1%	22.6%	12.0%	5.5%
AUSTRALASIA	0.2%	0.9%	7.0%	31.2%	44.1%	13.8%	2.4%	0.4%
CONTINENTAL EUROPE	0.5%	1.5%	7.4%	20.6%	35.8%	23.2%	9.3%	1.7%
GB&I	0.5%	7.5%	25.8%	33.1%	25.4%	6.2%	1.2%	0.2%
LATIN AMERICA AND CAR.	0.7%	2.0%	8.0%	22.0%	34.8%	19.6%	10.0%	2.9%
NORTH AMERICA	0.2%	1.5%	8.8%	28.0%	40.8%	15.7%	4.3%	0.6%
ALL	0.7%	3.8%	14.0%	28.2%	34.5%	13.8%	4.2%	0.9%

In an attempt to quantify average round times, means were calculated based on the mid-times of the intervals and using 6 hours for the greater than 5.5 hours category (although it is noted that this choice does not significantly impact the outcome). In Table 25 these averages are presented and, in general, golfers perceive that their average round time is slightly less now than when they started

playing golf. In the case of GB&I, the average round time was calculated as 3 hours and 44 minutes in both cases. It is interesting to note that within Continental Europe golfers perceive that they play on average in 24 minutes less now than they used to when they started playing.

Table 25 Mean rounds time now and when respondents started playing (Statistics generated from Question 20 and Question 21).

	Mean time (now)	Mean time (when starting play)
AFRICA	4:08	4:09
ASIA	4:05	4:15
AUSTRALASIA	4:09	4:06
CONTINENTAL EUROPE	3:54	4:16
GB&I	3:44	3:44
LATIN AMERICA AND CAR.	4:09	4:15
NORTH AMERICA	3:59	4:07
ALL	3:56	4:01

In Table 26 details are given of the cross tabulation of round times against forms of play. At this point it is worth emphasising the caveats that this data includes all regions and as such is weighted to those with higher numbers of responses (Table 1). We have not included Foursomes in this calculation due to its relatively low representation (see Table 13, with only 2.6% of respondents).

The modal response for Stableford and Stroke Play was 4.0-4.5 hours, whereas for Match Play this was 3.5-4.0 hours. Mean round times were also calculated for each form of play, indicating a fairly modest reduction in time for Match Play compared to Stableford (13 minutes). It is worth noting that these figures are calculated for the global sample rather than further subdivided into regions. As an example, the mean times for play within GB&I are included in the final row. The average time for Foursomes was calculated as 3:27. It should be noted that the mean time for Stableford play still came out as higher than for Stroke Play.

Analysis was also performed by age group of mean round times the lowest value was given by 18-24 year olds at 3:45 followed by 3:52 for respondents between 25 and 34. For all other groups the mean was within 3 minutes of 4 hours.

The mean times were also calculated by gender including all forms of play and these were 3:53 for females and 3:56 for males.

Table 26 Breakdown of round times by forms of play (Question 11 and Question 20).

	Match Play	Mixture	Stableford	Stroke Play	All
2.0-2.5 hours	0.9%	0.4%	0.5%	2.1%	1.1%
2.5-3.0 hours	3.9%	2.2%	1.3%	3.2%	2.4%
3.0-3.5 hours	20.9%	15.9%	9.7%	14.3%	13.4%
3.5-4.0 hours	39.8%	39.6%	32.6%	34.3%	35.2%
4.0-4.5 hours	28.1%	35.8%	45.8%	36.2%	39.1%
4.5-5.0 hours	5.7%	5.4%	9.3%	7.9%	7.6%
5.0-5.5 hours	0.6%	0.5%	0.9%	1.4%	1.0%

More than 5.5 hours	0.1%	0.1%	0.0%	0.5%	0.2%
Mean time	3:48	3:53	4:01	3:54	3:56
Mean time (GB&I)	3:38	3:43	3:49	3:41	3:44

Factors influencing frequency of play

Respondents were asked which factors prevented them playing more golf. They were given options of work commitments, family commitments, alternative hobbies, cost of play, cost of equipment, difficulty of play and the time to play. They were also given the chance to add their own category. The most frequent additional factor was fitness (namely the impact of age and the ability to get around a golf course) and beyond this many respondents stated that they already played enough golf; which is perhaps evident within the modal response of 100 rounds (see Table 17). The percentages given in Table 27 are based on the total number of responses within that region rather than the total number of respondents. For instance, in Africa 41.4% of the responses to the question were “Work Commitments”.

At this stage a comparison with the Syngenta study “Growing Golf in the UK”⁴ is merited. This survey included lapsed golfers within their sample. The top eight reasons given for why lapsed golfers had left the game were:

1. Overall cost of the game (36%)
2. The time it takes to play (31%)
3. Took up another sport or hobby I enjoy more than golf (30%)
4. Family responsibilities (29%)
5. Work commitments have not allowed me to play (23%)
6. I did not improve early enough to justify continuing (19%)
7. The game is too frustrating or difficult (14%)
8. My friends stopped playing (9%)

The remit of the current survey and the Syngenta survey are different but nevertheless it is interesting to note the parallels for those who gave up golf and the reasons cited herein preventing golfers from playing more golf.

Table 27 Factors preventing respondents from playing more golf (Question 19).

	Work commitments	Family commitments	Alternative hobbies	Cost of play	Cost of equipment	Difficulty	Time to play
AFRICA	41.4%	26.2%	9.0%	9.5%	0.7%	0.5%	12.7%
ASIA	35.5%	14.9%	5.9%	28.5%	2.7%	2.0%	10.5%

⁴ <http://www.greencast.co.uk/uk/news/general/news-2014/growing-golf-in-the-uk-download-your-free-report.aspx>

AUSTRALASIA	33.9%	32.1%	13.2%	5.6%	0.5%	1.4%	13.4%
CONTINENTAL EUROPE	37.7%	26.1%	9.8%	7.4%	0.4%	0.6%	18.0%
GB&I	33.5%	32.5%	14.5%	2.2%	0.4%	1.5%	15.6%
LATIN AMERICA AND CAR.	37.7%	26.6%	7.9%	9.8%	0.6%	0.7%	16.6%
NORTH AMERICA	28.8%	26.2%	12.7%	11.5%	0.8%	1.1%	19.0%
ALL	33.9%	28.8%	12.3%	7.2%	0.6%	1.2%	15.9%

The most prevalent factor which inhibited golfers playing more golf was work commitments, followed in most regions by family commitments; both of which are cited as reasons for lapsed golfers to stop playing (within the United Kingdom). The difficulty of play and cost of equipment were only raised as a reason by 1-2% of the respondents. It is noted that the highest level of response on cost of equipment came from Asia (and even higher in Japan at 3.5%) and this region also identified the cost of play as a factor (exceeding family commitments). It is also worth noting that the cost of play was identified in Asia in 28.5% of the responses as a factor preventing more play, this proportion increased still further in Japan to 34.3% (only 0.9% behind work commitments). The highest proportional response for time to play came from Continental Europe.

Table 28 Factors preventing respondents from playing more golf broken down by age ranges (Question 19 and Question 7).

Ages	Work commitments	Family commitments	Alternative hobbies	Cost of play	Cost of equipment	Difficulty	Time to play
12 to 17	26.8%	16.3%	18.6%	7.4%	2.9%	1.9%	26.0%
18 to 24	40.4%	11.4%	14.6%	10.0%	2.4%	1.8%	19.4%
25 to 34	37.8%	24.0%	9.4%	8.9%	1.1%	0.7%	18.1%
35 to 44	38.1%	31.0%	6.1%	7.3%	0.7%	0.4%	16.4%
45 to 54	43.0%	28.0%	6.9%	6.3%	0.5%	0.6%	14.7%
55 to 64	36.3%	27.0%	13.1%	6.9%	0.4%	1.0%	15.2%
65 to 74	12.3%	35.1%	24.9%	7.8%	0.6%	2.6%	16.8%
75 or older	7.0%	35.9%	25.5%	8.2%	0.7%	7.4%	15.3%

In Table 28 the data is broken down by age range. Unsurprisingly there is less concern about work commitments for those who typically would have retired (over 65) but the highest level of response for this cohort was associated with family commitments. There was also a marked increase for respondents over 75 citing difficulty of play; although this was still only ranked as the fifth factor even within this cohort. It should also be noted that in the 12 to 17 age range the most common responses were work commitments (several respondents in this age range added comments that this included educational commitments) and time taken to play.

Table 29 Factors influencing frequency of play broken down by gender (Question 19 and Question 1).

Gender	Work commitments	Family commitments	Alternative hobbies	Cost of play	Cost of equipment	Difficulty	Time to play
Female	29.2%	26.8%	17.7%	6.6%	0.4%	1.8%	17.6%
Male	34.6%	29.1%	11.4%	7.4%	0.7%	1.1%	15.6%
All	33.9%	28.8%	12.3%	7.3%	0.6%	1.2%	15.9%

In Table 30 this data is broken down by gender and the greatest disparity comes in the proportion of those who gave a reason citing “Alternative Hobbies” (17.7% for females compared to 11.4% for males) as the reason that they did not play more golf.

Attitudes to pace of play

The survey included a question to gauge the level of satisfaction of golfers with their current pace of play. The breakdown within each region is given in Table 30. The majority of respondents were either always happy or happy most of the time (ranging from 57.2% within Asia to 74.0% within North America).

Table 30 Respondents were asked whether they were happy with the amount of time it takes to play (Question 22).

	Always	Most of the time	Sometimes	Never
AFRICA	3.6%	58.3%	31.9%	6.2%
ASIA	7.5%	49.7%	36.7%	6.1%
AUSTRALASIA	4.2%	66.0%	25.9%	3.9%
CONTINENTAL EUROPE	5.1%	61.4%	29.4%	4.0%
GB&I	3.1%	65.7%	26.9%	4.2%
LATIN AMERICA AND CAR.	12.7%	51.9%	28.3%	7.1%
NORTH AMERICA	4.3%	69.7%	23.2%	2.8%
ALL	4.3%	64.6%	27.1%	4.0%

There is some evidence that some respondents would not respond positively in any event. In Table 31 data is given where all the regions have been amalgamated and a cross tabulation is presented showing the levels of satisfaction broken down into round times. There were 19 respondents who were not satisfied by round times of 2.0-2.5 hours, half of whom were from Japan. It has been suggested that some of these respondents may have thought that the question on round times (Question 20) referred to 9 holes (even though the question referred at the outset to 18 holes). The number of respondents from Japan identifying themselves as playing in 2.0-2.5 hours perhaps gives further evidence of this possible misunderstanding.

It is worth noting an enhancement in the level of dissatisfaction for respondents associated with round times in excess of 4.5 hours. However, this is not particularly evident for round times of 4.0-4.5 hours. This cohort will be discussed further on Page 27 of this report. The level of happiness was also analysed by gender but there were no clear differences in attitudes between these groups.

Table 31 Breakdown of levels of happiness with the time taken to play by reported playing times (Question 22 and Question 20).

	Always	Most of the time	Sometimes	Never
2.0-2.5 hours	17.3%	55.6%	23.3%	3.9%
2.5-3.0 hours	9.7%	65.3%	21.7%	3.2%
3.0-3.5 hours	5.5%	73.1%	19.9%	1.5%
3.5-4.0 hours	4.3%	72.1%	21.6%	2.0%
4.0-4.5 hours	3.7%	62.1%	29.9%	4.3%
4.5-5.0 hours	2.9%	34.8%	49.4%	12.9%
5.0-5.5 hours	2.8%	22.9%	47.3%	27.0%
More than 5.5 hours	5.0%	26.7%	33.3%	35.0%
All	4.4%	64.5%	27.1%	4.0%

Table 32 Comparison of levels of happiness with pace of play between respondents depending on whether they are club members or not (Question 22 and Question 6).

	Member club	Pay and Play	Proprietary (owned by a company)	Resort (hotel)	Non-members
Always	4%	5%	4%	5%	5%
Most of the time	65%	58%	66%	62%	62%
Sometimes	26%	32%	26%	29%	29%
Never	4%	5%	4%	4%	4%
Numbers	37790	4922	5787	926	11635

Although the majority of respondents were members of clubs (76.5% see Table 7), combining the data globally allows us to review the level of happiness comparing those who are members of golf clubs and those who are not. In Table 31 we show the percentage breakdown within each category and the final column is the total of the non-member columns. It can be seen that the level of happiness is not markedly different between members and non-members when considered globally. There was a shift towards “Sometimes happy” rather than “Most of the time” for those identifying themselves as playing at “Pay and Play” facilities.

Focussing on those who were less satisfied

This section considers a cross tabulation between the responses to “Are you generally happy with the amount of time it takes you to play?” (Question 22) and “How much shorter would your round need to be to increase your frequency of play?” (Question 24).

Table 33 Cross tabulation for respondents' levels of satisfaction and the level of improvement in round time necessary to affect their frequency of play (Questions 22 and 24).

	Most of the time				
	Always		Sometimes	Never	All
Would not make a difference	83.8%	64.1%	24.1%	11.1%	52.0%
1-20 minutes	6.2%	11.7%	9.9%	4.5%	10.7%
21-39 minutes	5.6%	18.0%	41.8%	31.0%	24.5%
40-59 minutes	2.5%	4.0%	18.3%	34.2%	9.1%
1 hour - 1 hour 30 minutes	1.2%	1.5%	4.8%	15.2%	3.0%
More than 1 hour 30 minutes	0.7%	0.6%	1.0%	4.1%	0.8%
Numbers	2072	31273	13121	1964	48430
Proportion	4%	65%	27%	4%	

There were 48430 who responded to both questions. Of these 4% (1964) said that they were never happy with their pace of play (Table 33). Roughly one third of this group would see 21-39 minutes as affecting their frequency of play and a further third citing a reduction of 40-59 minutes having a similar impact. This is in direct contrast to the group who respondents that they are always happy. There is likely to be some cross over between the “pace of play” and “time taken to play” in terms of the responses. The intermediate levels of satisfaction demonstrate a gradual transition between the two extremes.

Table 34 Cross tabulation for respondents' levels of satisfaction (aged 25-44) and level of improvement in round time necessary to affect their frequency of play (Questions 22 and 24).

	Most of the time				
	Always		Sometimes	Never	All
Would not make a difference	74.7%	56.0%	19.5%	6.1%	42.1%
1-20 minutes	7.4%	10.5%	7.0%	2.7%	8.8%
21-39 minutes	9.7%	21.0%	38.4%	24.8%	26.3%
40-59 minutes	5.2%	7.9%	25.5%	39.9%	15.3%
1 hour - 1 hour 30 minutes	2.3%	3.6%	8.3%	21.0%	6.0%
More than 1 hour 30 minutes	0.7%	1.1%	1.2%	5.5%	1.4%
Numbers	443	4761	2788	476	8468
Proportion	5%	56%	33%	6%	

This is further exacerbated for golfers aged 25-44 (see Table 34). For example there are now 21% of respondents who say that they are never happy with the pace of play and would need the pace of

play/time to play to improve by between 1 and 1 ½ hours to increase their frequency of play. This kind of improvement probably points to a more substantial change rather than merely speeding up play. Of the 8468 golfers in this age range, 19% (1586 respondents) said that they would welcome the chance to play 9 holes.

The effect of the pace of play

Respondents were asked whether playing in less time would improve their enjoyment of the game. Table 35 gives the breakdown by region of the response to this question. In general the responses were broadly homogeneous, namely around 60% said Yes and the remaining 40% felt that reducing the time to play would not improve their enjoyment or that it did not matter. It is worth mentioning that several of the additional responses in the survey referred to being happy with the pace of play and not wanting to be rushed.

Table 35 Respondents were asked whether playing in less time would improve their enjoyment of the game (Question 23).

	Yes	No	Does not matter
AFRICA	66.1%	22.5%	11.4%
ASIA	63.3%	13.3%	23.4%
AUSTRALASIA	56.3%	27.9%	15.8%
CONTINENTAL EUROPE	64.9%	23.4%	11.7%
GB&I	57.6%	29.2%	13.2%
LATIN AMERICA AND CAR.	59.6%	29.0%	11.4%
NORTH AMERICA	64.1%	25.7%	10.1%
ALL	60.1%	26.4%	13.5%

The next question asked respondents how much shorter their rounds would need to be to influence their frequency of play. The distinction between enjoyment and frequency of play is important here. Data is given in Table 36 on the breakdown in responses to this question. The modal response (in red) in all regions was that this would not impact their frequency of play. In all regions the next most popular answer was 21-39 minutes (in green). This might be seen as a target for any innovations in pace of play in terms of increasing the number of rounds played. This obviously equates to an average improvement of around 2 minutes per hole. It is worth noting that approximately 1 in 8 respondents from Continental Europe; and Latin America and the Caribbean stated that an improvement of 40-59 minutes (3 minutes per hole) might increase their frequency of play.

Table 36 Respondents were asked how much shorter their rounds would have to be to increase their frequency of play (Question 24).

	Would not make a difference	1-20 minutes	21-39 minutes	40-59 minutes	1-1:30 hours	>1:30
AFRICA	46.9%	10.7%	29.9%	8.5%	3.3%	0.7%
ASIA	40.4%	14.9%	25.1%	10.4%	2.5%	6.7%
AUSTRALASIA	55.5%	10.5%	22.9%	7.9%	2.6%	0.5%
CONTINENTAL EUROPE	46.6%	10.1%	24.9%	12.9%	4.7%	0.8%

GB&I	56.6%	10.0%	23.7%	7.2%	2.2%	0.3%
LATIN AMERICA AND CAR.	45.5%	7.9%	25.3%	12.7%	6.6%	2.1%
NORTH AMERICA	48.0%	11.5%	27.4%	9.7%	3.1%	0.4%
Missing	49.0%	11.8%	22.6%	10.8%	3.6%	2.2%
ALL	52.0%	10.6%	24.5%	9.0%	3.0%	0.8%

In order to try to understand further implications of this question, data is presented for a cross tabulation in Table 37. It is worth pausing here to note that 23 respondents who identified themselves as playing 18 holes in 2.0-2.5 hours would see an improvement of more than 1 hour as necessary to influence their frequency of play. This is likely to indicate a misunderstanding on the part of the respondents.

Focussing on respondents who identified themselves as taking 4.0-4.5 hours to play, whilst half (49.3%) of them stated that their frequency of play would not be influenced, there were 26.7% (5075 respondents) who felt that an improvement of 21-29 minutes per round (approximately 2 minutes per hole) might influence their frequency of play. Moving to those who indicated a round time of between 4.5-5.0 hours, 30.3% gave 21-39 minutes and 22.3% gave 40-59 minutes as improvements which might influence their frequency of play. For those identifying themselves as playing in 5.0-5.5 hours the modal response became 40-59 minutes (for 29.2% of respondents).

In summary, for those taking 4.5-5.0 hours over half of the respondents felt that playing in 21-39 minutes less per round would influence their frequency of play and for those taking 5.0-5.5 hours this moved 40-49 minutes per round (that is closer to 3 minutes per hole).

Table 37 Cross tabulation of round times and potential for increase on frequency of play via a reduction in playing time (Question 20 and Question 24).

	2.0-2.5	2.5-3.0	3.0-3.5	3.5-4.0	4.0-4.5	4.5-5.0	5.0-5.5	>5.5
Would not make a difference	272	638	3821	9737	9364	1192	115	41
1-20 minutes	121	153	831	1891	1929	208	20	8
21-39 minutes	80	203	1346	3944	5075	1121	73	13
40-59 minutes	20	82	360	1042	1909	826	136	13
1 hour - 1 hour 30 minutes	15	40	114	326	580	278	78	6
More than 1 hour 30 minutes	9	10	29	84	129	75	44	29
All	517	1126	6501	17024	18986	3700	466	110

Respondents were asked which option they agreed with. It should be noted that they were able to choose more than one option.

- I would enjoy golf more if it took less time
- I would enjoy golf more if it took more time
- I would enjoy golf more if there were more opportunities to play 9 holes

The percentage breakdowns are shown in Table 38. The most popular answer was that respondents felt that they would enjoy golf more if it took less time. There were also a range of respondents who indicated that they would enjoy golf more if there was more opportunity to play 9 holes, with the highest proportional response being within Continental Europe at 23.1% and in fact the highest proportion of golfers from this region said that they preferred to play 9 holes (see Table 20).

It is worth pausing here to note that there were 2.1%-5.5% (depending on region) who said that they would enjoy golf more if it took more time. This was reflected in many of the additional comments from respondents who generally expressed concerned over being rushed or their physical ability to move faster.

Table 38 Respondents were asked which options they agreed with (Question 25).

	Less time	More time	Play 9
AFRICA	78.5%	2.1%	19.4%
ASIA	73.5%	5.5%	21.0%
AUSTRALASIA	82.3%	4.0%	13.6%
CONTINENTAL EUROPE	73.0%	3.8%	23.1%
GB&I	82.4%	3.0%	14.6%
LATIN AMERICA AND CAR.	79.5%	4.8%	15.7%
NORTH AMERICA	83.5%	2.1%	14.4%
ALL	80.3%	3.4%	16.3%

Respondents were asked to identify the causes for issues with pace of play in their view. They were able to give multiple responses. The data was analysed by region by looking at the number of responses compared to the total number of responses rather than the number of respondents. These percentages were then analysed and the rankings within the 20 categories are displayed in Table 39. It is noted that “Poor etiquette”, “Player pre-shot routines” and “Bad Play” usually make up the top three reasons cited. It is noteworthy that within North America the top reason is “Players using tees which are too difficult for them” and this comes 4th within Asia.

Some of these factors are associated with player behaviour and others are within the category of management strategies. Congested courses are ranked higher than starting gaps being too small, although it would seem reasonable to think that these two are related. Course difficulty, green speed and hole locations are not ranked particularly highly as perceived causes of pace of play issues. Similarly the factor “Four balls” is not ranked highly as a perceived cause of pace of play issues (being ranked lowest of the factors in Australasia and North America and the penultimate factor in two other regions).

Table 39 Ranks for reasons cited for causing issues with pace of play during the round (Question 26).

	AFRICA	ASIA	AUSTRALASIA	CONTINENTAL EUROPE	GB&I	LATIN AMERICA AND CAR.	NORTH AMERICA	ALL

Needing to repair old plug marks	19	17	17	18	17	20	19	18
Players marking their card when it is their turn	7	6	4	5	6	9	14	6
Congested Course	5	2	10	6	9	4	7	8
Starting gaps too small	14	15	14	15	13	15	11	15
Length of rough	10	14	9	9	7	11	10	9
Course difficulty	11	12	11	13	14	12	12	13
Green speed	18	16	16	20	19	17	18	19
Hole location	19	18	19	19	20	18	17	20
Course length	15	20	18	16	18	16	15	17
Four balls	16	19	20	14	15	19	20	16
Poor etiquette	1	1	1	2	1	3	3	1
Weather conditions	13	11	13	8	12	14	16	12
Player pre-shot routines	2	3	2	1	2	1	2	2
Visitors	11	13	12	17	11	13	13	14
Players using tees that are too difficult	17	4	15	10	16	7	1	11
Unnecessary marking and lifting on the putting green	9	10	5	12	10	10	8	10
Players thinking they can reach the green	8	9	3	11	5	7	6	5
Lack of knowledge of the Rules	4	8	8	4	8	5	9	7
Bad play	3	7	6	3	3	2	4	3
Players mimicking Championship Golf	6	5	7	7	4	6	5	4

Those who take more than 4.5 hours to play

As presented in Table 31 the group of respondents who perceive that they take longer than 4.5 hours to play 18 holes demonstrates a higher proportion of those who are never happy with the pace of play, although they are still a minority. There were 4460 respondents who perceive that they generally take longer than 4.5 hours to play, of which 13.9% are females (slightly lower than the proportion for the entire survey, 17.4%). This group also includes a slightly higher proportion of respondents without official handicaps 10.9% against 6.0% and also includes a lower percentage of club members and a higher proportion of golfers who play “pay and play” facilities (18% rather than 9.9% for the entire survey).

Proportionally more of this group said that they stopped for a snack during their round (57.2% against 37.2%). The mean time for 18 holes came out as 4:50 for this group and even their times when they started playing golf were longer than average (4:26). It should be noted that the majority of the group (86.2%) perceived that they played between 4.5 and 5.0 hours rather than greater than 5 hours.

The reasons given for preventing them from playing more golf were very similar to the rest of the respondents, although the factor time to play increased from 15.9% to 19.7%. The most marked increase was associated with the cost of play from 7.2% to 13.5%.

As mentioned above the level of those who were never happy went up from 4.0% to 15.1%. The modal response also shifted to sometimes happy at 48.8% compared to the rest of respondents, whose modal response was “most of the time” at 64.6%. Again unsurprisingly, the proportional of this cohort who said that playing in less time would improve their enjoyment of the game increased to 75.1%. The level of reduction in time necessary to increase their frequency if play now included 23% of them feeling that this would need to be 40-59 minutes; although the modal response was still “would not make a difference” (31.5%) and the second most popular choice was 21-39 minutes (28.2%).

The ranking of factors seen as causing pace of play issues was very similar for this cohort when compared to the rest of the respondents. In summary there did not seem to be a clear indication from the survey as to what might be causing the longer round times for these players.

Additional comments made by respondents

In response to Questions 27 and 28 respondents took the chance to provide more extensive comments on the topic. Some of these are summarised below, although more detailed analysis will need to be undertaken on these responses in due course.

General practices

- Keep up with the group in front
- Mark your card whilst others are teeing off not on the green
- Be ready to play
- Play when ready rather than furthest from the hole or even on the tee (no mention of Match Play here)
- Pick up when out of the hole, consider extending this beyond Stableford.
- Play 9 (or 12)

Rules

- Change the Rules to leave the flagstick in
- Reduce ball search time
- Allow ball searching devices
- Penalise with stroke but not distance (more likely location!)
- Penalties for slow play

Calling groups through

- If you are more than a hole behind let the group behind through
- Let the group behind through whilst searching (some disagreement on this one)
- Let 2 balls and 3 balls pass through 4 balls

Management

- Extend starting gaps

- Measure at interim positions on the course
- Marshal – improve training. Give them authority even with older golfers, ex-captains etc
- Encourage senior golfers to show beginners how to play and keep pace (would need to choose these players carefully)
- Shorter courses
- Shorter rough
- Easier courses – the courses and management structures are dominated by low handicap golfers
- Keep groups of games together. For instance, 2 balls only before 10am.
- Repeat offenders sent out at the end of the field/day (or punished in some way).

Education

- Include Rule education within lessons
- Include pace of play within lessons
- Include Etiquette within lessons
- Video to show bad practice on pace of play

Professional golf

- This is probably the most prevalent comment
 - More penalties
 - Lead by example
 - Penalise high profile players rather than lower profile ones.

Negative comments

- Leave us alone
- Golf is not a race
- If you want to run play another sport

List of questions

Some brief questions to find out about you

1. What is your gender?

- Female
- Male

2. Do you have a current official handicap?

- Yes
- No

3. What is your (usual playing) handicap?

- better than scratch
- 0-5
- 6-12

- 13-20
- 21-28
- 29 and above

4. What is the name of your home club?

5. In what country do you currently reside?

6. What type of golf course do you typically play at?

- Member club
- Proprietary (owned by a company)
- Pay and Play (turn up and pay to play)
- Resort (attached to a hotel or similar)

7. What is your age?

- Under 12
- 12 to 17
- 18 to 24
- 25 to 34
- 35 to 44
- 45 to 54
- 55 to 64
- 65 to 74
- 75 or older

8. How many years have you been playing golf?

9. Please indicate if you use the following during a round (please mark the item you use most frequently)

- Power trolley
- Golf cart (ride on transport)
- Trolley/Pull cart
- Carry bag only
- Employ a caddy

10. What time do you typically tee off?

- Early Morning
- Mid Morning
- Midday
- Mid Afternoon
- Evening
- No preference/variety of the above

11. What is your normal form of play?

- Match Play
- Stroke Play

- Stableford
 - Foursomes
 - Mixture
 - Other (please specify)
12. If you play four ball better ball, which format do you tend to play?
- I don't play four ball better ball
 - Yes - Match Play
 - Yes - Stroke Play
13. How many players are normally in your group (in your favoured form of play)?
- Number of players
14. Approximately many rounds of golf do you usually play in a 12 month period?
- Typical number of rounds
15. Roughly how are your rounds divided between different types of play (percentages)?
- Social (but competitive)
 - Social (fun)
 - Competition (club or similar)
16. Do you generally play 18 holes or do you prefer other options?
- 4 holes
 - 6 holes
 - 9 holes
 - 12 holes
 - 18 holes
 - Other (please specify)
17. Would you normally stop during a round of golf for snacks etc, ie stop at a halfway house?
- Yes
 - No
 - Sometimes
18. Do you use a Distance Measuring Device (DMD)?
- Yes
 - No
 - Sometimes
19. What factors, if any, prevent you from playing more golf?
- Work commitments
 - Family commitments
 - Alternative hobbies
 - Cost of play
 - Cost of equipment
 - Difficulty of play

- Time to play a round
- Other (please specify)

20. How long would you typically take to play a full round of golf (18 holes)?

- 2.0-2.5 hours
- 2.5-3.0 hours
- 3-3.5 hours
- 3.5-4.0 hours
- 4.0-4.5 hours
- 4.5-5.0 hours
- 5.0-5.5 hours
- More than 5.5 hours

21. How long did you typically take to play 18 holes of golf when you started playing golf?

- 2.0-2.5 hours
- 2.5-3.0 hours
- 3-3.5 hours
- 3.5-4.0 hours
- 4.0-4.5 hours
- 4.5-5.0 hours
- 5.0-5.5 hours
- More than 5.5 hours

22. Are you generally happy with the amount of time it takes you to play?

- Always
- Most of the time
- Sometimes
- Never

23. Do you think playing in less time would improve your enjoyment of your game?

- Yes
- No
- The length of time does not matter to me

24. How much shorter would your round time need to be to increase your frequency of play?

- Would not make a difference
- 1-20 minutes
- 21-39 minutes
- 40-59 minutes
- 1 hour - 1 hour 30 minutes
- More than 1 hour 30 minutes

25. Which of the following options would you agree with (you may tick more than one)?

- I would enjoy golf more if it took less time
- I would enjoy golf more if it took longer

- I would enjoy golf more if there were more opportunities to play 9 holes
- Other (please specify)

26. Please check the box(es) which in your opinion cause pace of play issues during your round:

- Players thinking they can reach the green
- Players using tees that are too difficult
- Lack of knowledge of the Rules
- Players mimicking televised Championship play
- Course difficulty
- Green speed
- Player pre-shot routines
- Visitors
- Starting gaps too small
- Unnecessary marking and lifting on the putting green
- Poor etiquette
- Congested Course
- Needing to repair old plug marks on the green
- Weather conditions
- Players marking their card when it is their turn
- Hole locations
- Course length
- Bad Play
- Length of rough
- Four balls
- Please add any further comments

27. In your opinion what might improve the pace of play?

28. Please feel free to add any further comments on this topic

List of countries in regions

Africa: Botswana, French Giana, Gambia, Ghana, Guadeloupe, Ivory Coast, Kenya, Kuwait, Madagascar, Malta, Mauritius, Morocco, Nigeria, South Africa, Tunisia, Uganda, Zambia, Zimbabwe

Asia: Afghanistan, Bahrain, Bangladesh, Bengal, Brunei Darussalam, Cambodia, China, Dubai, Hong Kong, India, Indonesia, Israel, Japan, Laos, Malaysia, Mongolia, Nepal, North Korea, Pakistan, Philippines, Qatar, Saudi Arabia, Singapore, South Korea, Sri Lanka, Taiwan, Thailand, United Arab Emirates

Australasia: Australia, French Polynesia, New Calendonias, New Zealand, Papua New Guinea, Samoa

Continental Europe: Austria, Azerbaijan, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Georgia, Germany, Gibraltar, Holland, Hungary, Iceland, Italy, Kazakhstan, Latvia, Liechtenstein, Lithuania, Luxembourg, Monaco, Netherlands, Norway, Poland, Portugal, Romania, Russia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, Ukraine

GB&I: England, Scotland, Ireland, Northern Ireland, Wales, Channel Islands, Isle of Man

Latin America and the Caribbean: Argentina, Bahamas, Barbados, Belize, Bermuda, Bolivia, Brazil, Cayman Islands, Chile, Colombia, Costa Rica, Dominican Republic, Ecuador, Falkland Islands, Guatemala, Jamaica, Mexico, Nicaragua, Panama, Peru, Puerto Rico, Trinidad & Tobago, Uruguay, Venezuela

North America: Canada, USA

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