



# Speed of Play

The recently completed *Australian Golfer Survey – 2005* has thrown light on a number of interesting issues and found a number of interesting statistical patterns. (Did you know that you are more likely to have had a hole in one if you are male, are aged over 65, hit your driver more than 240 metres, predominantly hit a draw or a straight ball, and use Cleveland clubs?).

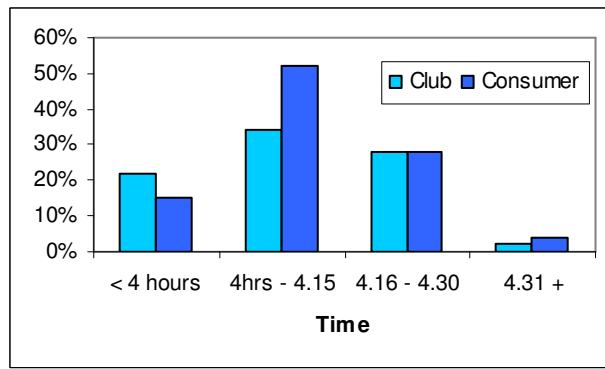
One of the areas specifically included in the research at the request of the AGU was speed of play. It is a burning topic and is constantly being discussed in club board rooms, and on tees and fairways around the country. To date there have been no complete cure, with the issue being addressed in many different ways by different clubs. We have seen the “Fast Zone” concept successfully introduced at Moonah Links, where the players are agreeing to abide by some speed of play principles, to more typical methods including marshals, time recording on cards, and the extreme measure of Bundy clocks (isn't this leisure time?).

Is the speed of play issue actually as bad as some make it out to be? Recent consumer research appears to support this view. The Australian Golf Industry Report – 2004, (a great read, assume you have bought one) sought information from clubs on this issue. It was found that the average time taken per competition round was 4 hours 15 minutes. (yes, differences existed when measured by annual fee levels, member numbers, course length etc but this was the average.) This was supported by the number of clubs being concerned about slow play increasing to over 70% when round time exceeded 4 hours 30 minutes.

In this market, where clubs are the seller of a product and the golfer is the buyer, who's right is it to actually set the slow play rules? If the seller of the product can afford to say “you must complete your round in 4.15 or we'd rather you not buy it”, then fine, however with current demand levels as they are, not many facilities are in this position.

So what does the buyer of the product think? The Australian Golfer Survey – 2005 included two questions that addressed slow play. The first was “what do you like least about your club?” and the second “how long should a 4-ball round reasonably take to play?” In answer to the first, slow play was the clear winner with near half of all respondents stating it was their biggest issue, followed by busy tee sheets and course etiquette. In answer to the second, the survey found that the consumer actually has a time expectation that is a slight bit longer though reasonably consistent with the product seller as illustrated below.

## 18-hole round time expectation comparison



Source: 2004 Industry Report & 2005 Golfer Survey

How can slow play be the number one complaint yet both the product seller and buyer's expectations be nearly the same? Again, glad you asked. Averages can hide the answer. Our research has found that there are different expectations when measured by three of the key variables in the golf industry – age, gender and handicap. Let's go to the stats.

When measured by age, the research found that the slow play complaint is consistent across age groups, though is less of a concern for women generally (45% vs. 35%). The level of complaint increases however when measured by handicap. Those complaining more? It is typically the better male golfers on handicaps of 12 or less. Slow play doesn't appear to be as big an issue for women across the handicap spectrum, suggesting more patience being given to all playing the game.

The application of this information sees a number of issues raising their heads. Should golfers be split up so like pace players play with one another? Do slower groups go out in threes or at the back of the field? Does playing “ready golf” need to be regularly encouraged? (yes) Does the fast zone concept need to be widely adopted? (yes) What message does the big stick, Bundy clock approach give?

In answering how you manage expectations re pace of play, it comes down to who your golfers are and which of your customers you are going to try to keep happy most of the time. Given that national handicap data from GolfLink shows that just on 18% of golfers (22% of males) play to handicaps of 12 or less, it would therefore appear that, unless specific pace of play systems are adopted, the time expectations that the 12 + handicap golfer has will be what is generally achieved, this being closer to 4.30 than 4 hours.