



What every golfer wants

Understanding exactly what attracts players to a course is essential for greenkeepers and club managers to prioritise their efforts in enhancing the golfers' playing experience.

The Syngenta Golf Player Survey has sought to identify what players actually want, reports the Syngenta Turf Business Development Manager, Rod Burke

Golf players say focus on turf quality. Enhancing the playing experience is crucial to attracting and retaining payers at golf courses, thus ensuring the financial sustainability of the club. With golf clubs under intense economic pressure and the increasing trend for 'nomadic' golfers to move between clubs and courses, it's more important than ever to find out what they really want. Attracting membership, visitors and 'pay and play' golfers is critical to the economic success of any golf course.

Syngenta commissioned international independent market research specialist, Gfk Kynetec, to survey over 300 golfers from clubs across the UK, to find out what aspects of turf and club management are most important

to them and, importantly, how satisfied they are with existing practices on their clubs.

The results have clearly reinforced the essential need for clubs to focus on turf playing quality - and most specifically greens - as the most important factor for players, along with offering a fascinating insight into some of the areas where greenkeepers can focus their time and investment.

Without exception for course type or skill level of players - the survey separated out members clubs, municipal courses, private businesses and hotels, as well as high and low handicap players - the condition of greens, fairways and tees always appeared in the Top Five factors, and always in that order.

Other elements identified were the design of the course,

which was the second most important factor for players with a low handicap (<10), but less important for those of higher handicaps. Inevitably the price of membership or green fee was also high on the list, but rated of more importance among the high handicappers, compared to low handicap players. Price was most important for players who play most often at municipal or private clubs.

The survey also revealed that elements that could be grouped as 'clubhouse services' - elements such as food and beverage, shop facilities, practice areas and buggy availability - all scored of the lowest importance in the factors questioned.

For greenkeepers it is a powerful argument to ensure that clubs continue to invest in their turf, if they are to attract new players.



Out on the course, it will come as no surprise that the quality of the greens is clearly of paramount importance and most critically appraised by players. But, interestingly, there was generally better satisfaction with the condition of greens, compared to condition of fairways, tees and, to an even greater extent, rough.

With green performance, the players rated smooth ball roll as the most important factor, with 92% of players questioned scoring it 7/10 or more. Of the 12 questions asked which addressed playability, fast ball roll - which is frequently quoted as the Holy Grail for greenkeepers - actually scored lowest with players, including both high and low handicaps.

Some other aspects of greens management where players prioritise importance include (in order), freedom from weeds; free of scars or disease; a firm playing surface and consistent pace between greens. Turf density was seen as significantly more important at members, private and, especially, hotel, courses, compared to town or municipal clubs.

Greens free of brown dry patch areas was also highly desirable, with 50% of players rating it of the highest importance (>9/10). However, it was this issue that gave rise

to the greatest levels of dissatisfaction with current performance of greens management, with less than 30% very satisfied.

The lower levels of satisfaction among players in fairway condition indicates clubs that can provide higher quality stand to get the best results in attracting new players. The most important factor which players of all standards want is for the ball to sit proud on the turf, along with even and consistent grass height and cover. Again the presence of dry, or drought affected areas, gave rise to the highest levels of dissatisfaction, along with levels of divots, scars and bare patches.

Tackling thin or bare patches is also of the highest priority for players for management of tees; over a third of players were not satisfied with the level of divots and scars.

However, turf colour and having turf stripes and clearly defined on tees is of much lower importance.

In rough areas, the survey has shown that the ability to find a ball easily is highly important, which links to one of the players' major gripes around the speed of play. Rough that appears managed and even is of the highest importance - with the desire for fine wispy grass species and not thick and tangled, highlighted.

However, with around half of all

players reporting not being satisfied with current rough management, it highlighted that these desires are not typically being met.

Outside of the actual playing area, the survey showed that a course that looks natural is the most important environmental aspect. For over 70% of players, being able frequently to observe birds and wildlife is highly important, with a similar number supporting environmental initiatives at

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the course as highly important.

Indeed, the aesthetics and environment of the course is second only to its design as the prime factor most likely to attract new players.

This survey, the first of its kind identifying player desires and satisfaction in such detail, provides a wealth of information to enable greenkeepers and club managers find a way to enhance the playing experience, with the potential to attract more players to their clubs.

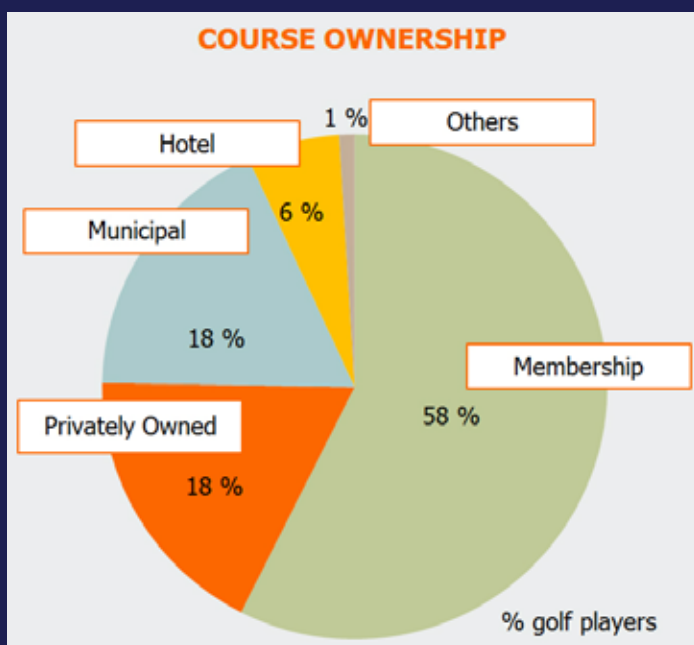
Syngenta Golf Player Survey – who and what was asked?

- Broad section of golf players, course types and handicaps
- Assessing factors that influence the playing experience: turf quality; environment and club facilities
- All areas of the course
- Satisfaction levels with current course performance?
- What attracts golfers to new courses?
- 305 golfers
- Nationwide survey:

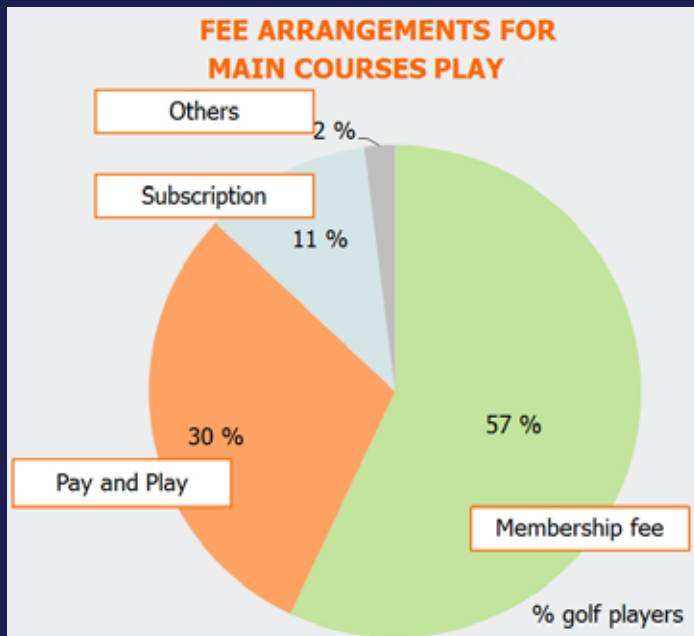
Scotland 17%.....North of England18%
 Midlands 18%.....Easter counties.....15%
 South East . 14%.....South West7%
 Wales 6%.....Northern Ireland.....4%

- All ages: < 35 - 13%; 36-50 - 32%; >50 - 54%
- Main course holes: 18 holes - 81%; 27 holes - 7%; 36 holes - 5%; others - 7%

COURSE OWNERSHIP



FEE ARRANGEMENTS FOR MAIN COURSES PLAY



Survey source: GfK Kynetec: Study of golf player perceptions, satisfaction and desires for golf course management; 305 golfers; January 2012

Syngenta Golf Player Summary – Fairways

- Ball lie is the most important factor for fairway performance
- Players are significantly less satisfied with fairway condition, compared to greens
- Even and consistent turf height a highly important factor; but only 64% satisfaction rating
- Over 40% not satisfied with levels of scars, bare patches and divots
- Brown and drought stressed areas give the highest levels of dissatisfaction

Syngenta Golf Player Summary – Greens

- Greens condition is players' Number 1 factor in judging a course
- Smooth ball roll is the most important factor
- Fast ball roll is the least important factor surveyed
- Only one third of players are 'very satisfied' with the condition of greens; 40% 'quite satisfied'
- Greens free of weeds and disease or scars is the second most important factor for players
- Dry brown patches give the highest levels of dissatisfaction in greens condition

Syngenta Golf Player Summary – Out-of-play rough

- A natural looking course is most important to players
- Aesthetics and environment of the course is second only to its design to attract visiting players – more important than quality of greens and turf
- Three quarters of players rate viewing birds and wildlife as high importance
- 70% of players want to see environmental initiatives on the course
- Turf quality and condition on the playing part of the course far exceeds importance of other factors

Syngenta Golf Player Summary – Tees

- Tee condition is the turf area of greatest dissatisfaction among players
- Avoiding thin or bare patches is of the greatest importance for players
- 40% of players are not satisfied with levels of bare patches, divots and scars
- Half of players are not satisfied with dry patch and areas affected by drought on tees
- Turf stripes and definition is of least importance on tees

Syngenta Golf Player Summary – In-play rough

- Over half of players are not satisfied with most aspects of rough management
- Managed and even rough is the most important factor
- Ball location and playability is the second factor – Speed of play is a major issue
- Players want fine wispy grass species, not thick tangled rough