6 December 2023

TO: Golf Industry Stakeholders
RE: Distance Insights Project Update

Today we are communicating three important updates regarding the Distance Insights Project which commenced in 2018. The Distance Insights Report, published by The R&A and USGA in March 2020, represents the most comprehensive analysis of hitting distance and its impact on the sport ever undertaken.

Through our Distance Insights Project, we have been focused on using data to understand the impact of innovation – including in equipment, golf course maintenance, launch monitors and fitness - while looking to ensure a healthy and sustainable future for golf. Through our research and review, as well as our discussions with industry stakeholders and partners, we have sought to embrace and respect the current momentum and growth of the game, while also taking a broader, unbiased and long-term view on how continuing increases in hitting distances could impact our sport.

The data, which we have worked alongside the industry to collect and analyze, unequivocally shows that hitting distances, specifically at the elite level, have increased substantially and continually over the long term (and in fact, have continued to increase since we released the Distance Insights Report). There is nothing to suggest that this trend will stop and based on recent data, we believe distance will continue to increase in the future.

Protecting the integrity of golf courses, including their overall length, and ensuring that a variety of skills are needed to play them, preserves the fundamental elements of the sport. Both of these aspects have been impacted by increases in hitting distance and will continue to be impacted if nothing is done to address these trends now. In addition, our sport must be cognisant of the environmental impacts and what this means for golf courses, their operators and ultimately golfers and the communities around them. Longer golf courses require additional resources, including water and nutrients, all of which come with an environmental and economic cost.

In 2022 and 2023, we put forward proposals related to the ball and driver and encouraged an industry dialogue on whether an across-the-game solution or one targeted at elite golf through a Model Local Rule would be more effective and appropriate. We have consulted widely and listened carefully, while clearly expressing our strong view that doing nothing would be irresponsible. The change being communicated today reflects that interactive process. While we previously proposed a targeted change to only elite golf, we have incorporated feedback from a broad range of stakeholders/players who stressed the importance of unification in the game of golf, mainly the importance of maintaining a single set of playing rules and a single set of equipment standards. This feedback clearly indicated that an across-the-game solution with deferred implementation is the preferred

solution.

This change will begin to address the long-term cycle of consistent increases in hitting distances in golf and will help protect and benefit the sport for future generations. We remain committed to doing what is best for the long-term health of golf and, to be clear, going forward we will engage with and work even more closely with the leading tours and industry partners to monitor hitting distances and other playing aspects of the game in a timely manner. This proactive approach will ensure that the equipment rules are reflective of the prevailing technology and playing environment.

Today, we are communicating the following updates:

1. We will **implement an across-the-game change to the speed used to test golf balls under the Overall Distance Standard (ODS), beginning January 2028.** While all golf balls submitted for conformance as of 2028 will need to adhere to the new standards, these changes will not impact the recreational golfer until 2030, and then only minimally.

2. We plan to **expand our testing approach to better detect "Driver Creep", which can result in drivers exceeding the limits set out in the Equipment Rules.**

3. We will **continue to monitor drivers and explore possible additional options related to distance. Specifically, we will research the forgiveness of drivers and how they perform with off-centre hits.** This is an on-going review and we will seek input from and continue to work with the industry, including manufacturers, to identify driver design features that potentially could be regulated as a means to reward centre impact position hits versus mis-hits.

A more detailed explanation of the above points is set out below:

1. GOLF BALL – AMENDED CLUBHEAD/BALL SPEED WITHIN THE ODS

We will update the test conditions by increasing the clubhead speed to 125mph from the current 120mph (equivalent of increasing ball testing speed to 183mph from the current 176mph) and amending launch conditions in the Overall Distance Standard (ODS) for conforming golf balls.

This will be the first time the standard has been updated for more than 20 years. The updated standard, which is intended to more accurately reflect the modern game, will take effect beginning in January 2028. This date was selected to give manufacturers the time needed to design, test, produce and distribute balls.

In addition, with respect to the recreational game, all existing conforming balls as of 31 December 2027 may continue to be used until 1 January 2030. This phased implementation is designed to lessen the impact on recreational golfers and retailers.

The change to the ODS test will have the most impact on golfers who generate the fastest ball speeds, which for driving clubs is expected to be 13-15 yards for the

longest hitters (with the estimated impact on the average PGA TOUR or DP World Tour player being 9-11 yards and the average LPGA or LET player being 5-7 yards). At the new testing speeds, the distance reductions should be minimal for most recreational golfers, estimated to be 1-5 yards.

The Overall Distance Standard was first introduced in 1976 and was always intended to replicate the effectiveness of equipment when used by the fastest swinging golfers. The ODS test speed was originally set at 109mph clubhead speed and was updated in 2004 to 120mph clubhead speed which is the testing equivalent of 176mph ball speed. For reference, when the PGA TOUR first introduced tracking of clubhead and ball speed in 2007, the season-long average of the top 25 players as ranked for ball speed was 176.6mph, which was the same speed as the testing standard introduced three years before. In reviewing the same data for the 2023 season, the average ball speed of the top 25 is 183.4mph, which is consistent with the revised testing standard (183mph) that will be used in 2028. This analysis confirms that we are increasing the testing speeds in a manner that is consistent with previous changes.

The official notice of decision regarding the ODS changes and planned implementation can be found via [this link].

2. CT TESTING – ADDRESSING "CREEP" MORE EFFECTIVELY

Regarding Characteristic Time (CT) testing, we have received significant feedback and/or concern, that many of the designs and materials used to manufacture today's drivers can undergo significant changes during use. These changes can result in the club's CT value (spring-like effect) increasing beyond the conforming limit, known in the industry as "CT creep".

Importantly, today's announcement does NOT alter the current standard that is in place for CT of golf clubs. However, it has become evident that many clubs are being manufactured close to the upper limit of the tolerance and as those clubs change through use over time, they may consequently exceed the CT limit.

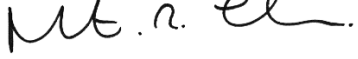
Therefore, The R&A and USGA will introduce additional testing on submitted drivers to identify and proactively address driver models that are close to the tolerance levels and have CT values that are more likely to exceed the CT limit through regular use. These proactive measures will have little impact on driving distance but are being proposed to ensure that the standards expected by stakeholders are maintained with future innovation.

[The official notice to manufacturers regarding this proposal can be found via [this link]].

3. CONTINUE TO RESEARCH FORGIVENESS OF DRIVERS AMONG ELITE PLAYERS

We are increasingly aware of stakeholder concerns around the level of forgiveness of drivers when used by elite golfers. Specifically, with off-centre hits resulting in minimal impact on accuracy and hitting distance, some stakeholders have voiced concerns that there is limited risk to the elite player in continuing to pursue greater clubhead speed, thus diminishing an important risk/reward aspect of the game. At this point we have not identified an effective solution to reward centre hit driver performance at the expense of off-centre hits. Previous research into a Model Local Rule for drivers used in elite golf found that all likely proposals would impact multiple clubs (and not just the driver). We will continue to work closely with our industry partners as we research this topic further.

In summary, we have conducted the most thorough and comprehensive review of distance ever undertaken in golf and worked with stakeholders across the sport collaboratively and constructively. We have acted throughout this lengthy process with the best interests of golf at heart and with a clear objective to do what is best for its long-term future and sustainability. Through our extensive consultation with stakeholders we have heard a wide range of views expressed and have listened, considered and responded. We greatly appreciate the contributions we have received from throughout the industry. This has helped us to arrive at an effective and appropriate across-the-game solution, with deferred implementation to give the sport time to adjust. We look forward to working with the industry to implement this solution in the years ahead.



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