



GOLF 2.0

“Friends, Family, Fun!”

What is Golf 2.0?

- Strategic plan to reach our potential as an industry and increase the number of golfers from 27 million to 40 million by 2020
 - Transformational shift to make the game of golf even more relevant, friendly, fun, and welcoming to all
 - A movement to embrace the millions of individuals who want to play. 90 million with an interest to play or play more.
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What is Golf 2.0?

- Reshape the perception, image and environment of the game
Game has an image problem; expensive, time consuming, cost, rules
 - Core Golf 2.0 messages: Golf is a fun family activity, golf is affordable, golf does not have to be 18 holes, golf is good for women, golf is healthy.
 - Promote value of the game both monetarily and socially
 - Adapt to changing consumer profiles and preferences
 - Generation X (born 1960's-1970's)
 - Generation Y (born 1980's-1990's)
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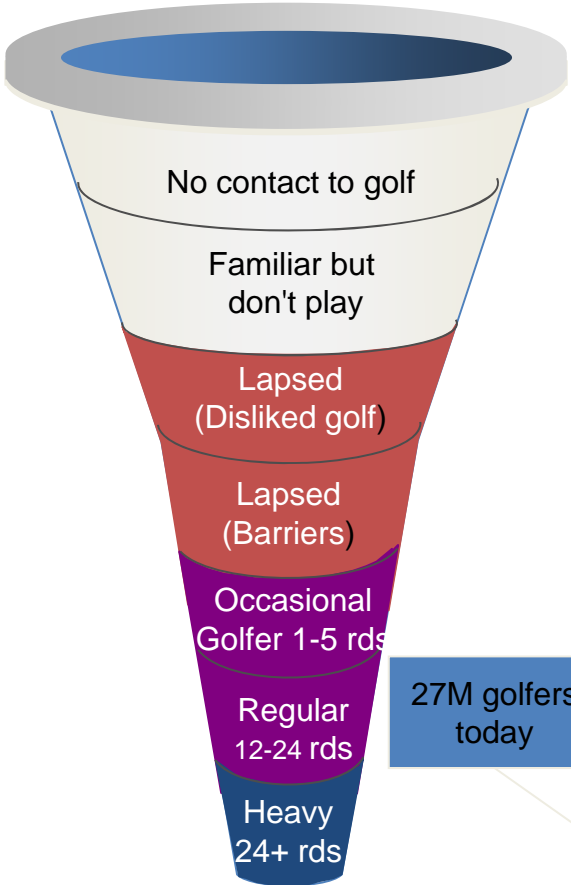
What is Golf 2.0?

- PGA of America engaged the Boston Consulting Group to conduct a thorough investigation of golf's prospects- thousands surveyed within the industry
 - In response to the recent economic downturn-
 - ✓ 1-year slide in participation- loss of 1 million golfers
 - ✓ 5-year slide in participation- loss of 4 million golfers since 2006
 - No action means continued downturn
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Golf 2.0 Research

- Lapsed golfers- 90 million Americans have played golf in the past and enjoyed the experience
 - 70% of those 90 million have expressed some interest in playing again
 - Beyond the lapsed golfers, there are 20 million who aspire to play but have never tried
 - Among current golfers, there are many who would like to play more.
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Opportunity for growth

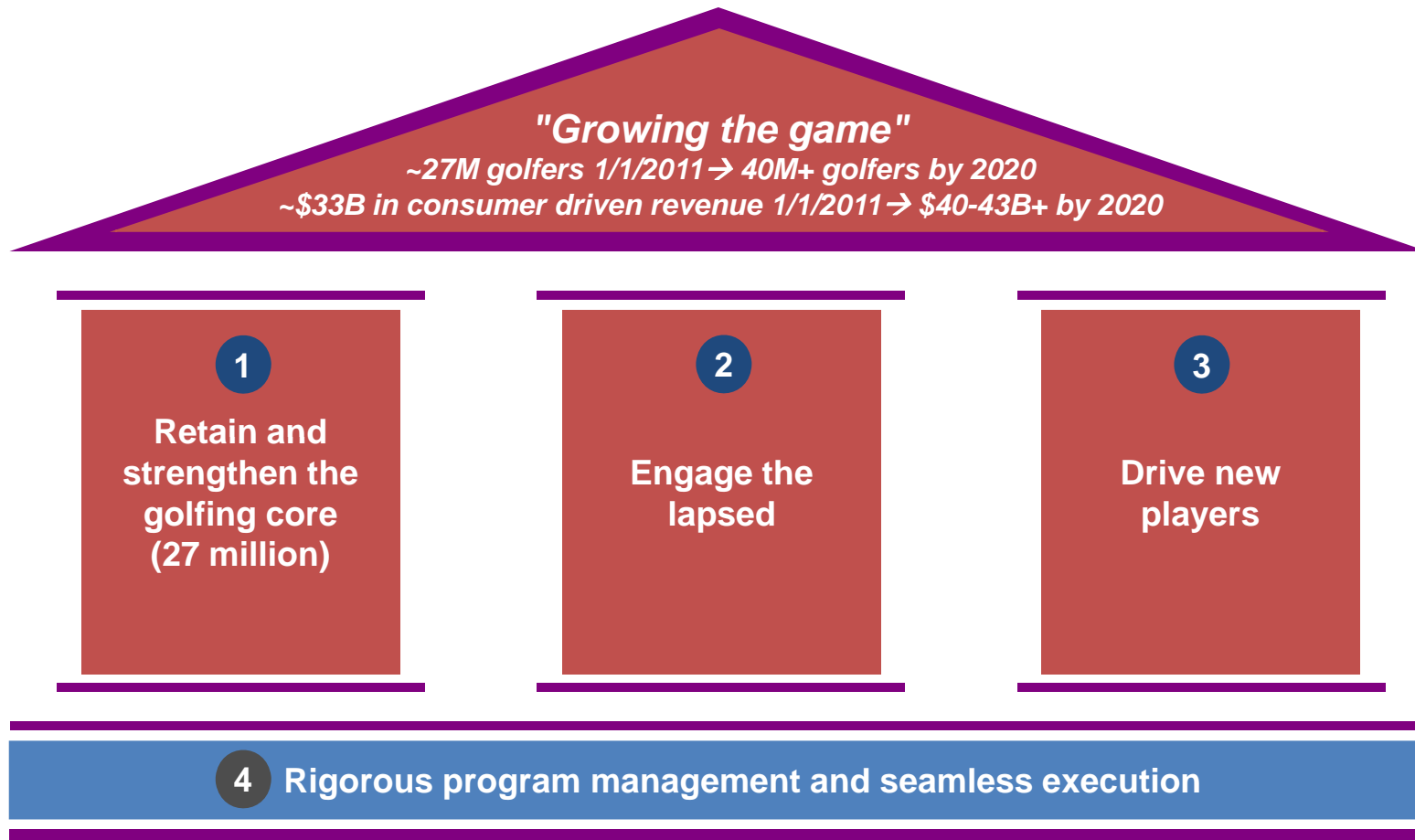


**Total Population
(over 13 yrs of age)**

US Population	X	% Interested in golfing (or more if golfing)	=	Number interested in golfing (more)
59 M		14%		8 M
56 M		21%		12 M
20 M		0%		0
90 M		68%		61 M
14 M (52%) 17%		43%		6 M
7 M (26%) 23%		36%		2 M
6 M (22%) 60%		17%		1 M
253 M ¹		36%		90 M

27M golfers today

Three core strategies for growing golf



Strategic initiatives to drive growth

Retain & Strengthen the Golfing Core

- 1a** Know your customer
 - Learn & use the details
 - (True North Research)
- 1b** Deepen engagement in current golfers
 - Utilize customer information for loyalty, leagues, etc.
 - Components to meet time, expense, not-welcoming barriers
 - Improve facilities

Engage the Lapsed

- 2a** Connecting with her
 - Specific efforts towards women
 - Hiring of WNBA commissioner Donna Orender
- 2b**
- 2c** Welcome back to golf
 - How to welcome novices
- 2d** Family focus
 - Specific hooks for families
 - Family Golf Month
- 2e** Platinum players
 - Engaging lapsed seniors
 - 50 million Baby Boomers

Drive New Players

- 3a** Off-course options
 - Alternative formats to traditional green-grass courses
- 3b** Drive for Diversity
 - Programming and marketing appealing to minority community
 - SD County Population
 - 32% Hispanic 32% Growth Rate- decade
 - 11% Asian 34% GR
 - 5% African American

- 4a** Member education --- Oversight of member (and industry) education aligned with all other initiatives
- 4b** Manage affordability perception --- Efforts aimed at messaging to correct consumer misperceptions
- 4c** "I'm ready to play" --- Appeal to new golfers (spillover to others) by highlighting PGA pro role in teaching beginners & improved welcoming environment; create catch phrase to signify "I'm a novice / beginner"

What is The PGA of America doing?

- Uniting the golf industry behind Golf 2.0
- Building a team to execute strategic initiatives, including adding Sr. Director of Golf 2.0, expert Regional Field Player Development Managers, 2.0 Women's consultant.
- Determining metrics and using research to measure progress
- Piloting initiatives and developing programs ie: Get Golf Ready Tee It Forward, Women's Golf Day/Month
- Educating PGA Professionals and providing them with best practices, tools and resources to help their owners and employers succeed.

What can you do right now?

- Make sure there is facility-wide knowledge and awareness of your golf operation
 - Train all staff members on new golfer programs.
 - Ensure staff understand the benefits of your special events and core programs (i.e., tournaments, club fitting, instruction).
 - Train staff to promote these offerings and provide incentives to do so.
 - Re-commit to your personal development and education, and share this knowledge with your golf operation staff
 - Take full advantage of PGA education opportunities.
 - Send key staff to the PGA Merchandise Show?
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What can you do right now?

- Conduct a customer service review to ensure that your staff is delivering the high level service you expect (True North Research)
 - Have you conducted a “secret shopper” exercise to gain feedback on your facilities service?
 - Have you surveyed your customers to ask about service levels?
 - Share Best Practices within each facility. The PGA of America has hundreds available to PGA professionals on PGALinks.com
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What can you do right now?

- Take full advantage of existing programs
 - Get Golf Ready (84% retention, 61% women, 25% minority)
 - PGA Family Course Program
 - Tee it Forward
 - Golf for Women
 - Be aware of the keys to success at your facility
 - Accessibility to courses
 - Well trained PGA Professionals
 - Supportive owner and facility-wide awareness
 - Physical plant for new players – i.e., bunny slopes
 - Marketing strategy
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What you can do now?

- Maintain and improve course conditions and amenities and communicate improvements to the public
 - Ease of access for residents
 - Flexibility in business plan
 - Preserve your History
 - Provide affordable rates
 - Protect PGA events and increase market value
 - Protect and market facility identity- each is different
 - Customize your service and programs to each core group
 - Promote consumer messages:
 - Golf is affordable, accessible and ageless
 - Golf is about friends, family and fun
 - Golf is healthy, green and charitable
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