

ALTERNATIVE GOLF EXPERIENCES

Executive Summary

*December
2015*



BACKGROUND

There are a wide variety of golf-related experiences that are off-shoots of the traditional game. Their one common thread is that their inception was inspired by traditional golf.

Golf 20/20's Alternative Golf Experiences (A.G.E.) Task Force was formed to evaluate these various activities with the intention of identifying those which have the largest potential for growing the traditional game.

The A.G.E. Task Force identified a “short list” of four alternative golf experiences that warranted further investigation.

A.G.E. Researched

Video Game Golf | Topgolf | FootGolf | Simulator Golf

Surveys completed: n=3,700

n=1,400

n= 351

n=127

The National Golf Foundation was commissioned to delve into each of the individual A.G.E. to evaluate their characteristics including their health, unique attributes, participant profiles, and relationship with the traditional game of golf. Online surveys were conducted with participants in each of the four A.G.E.



WORLD GOLF
FOUNDATION

NGF
NATIONAL GOLF FOUNDATION

KEY FINDINGS

- Although many A.G.E. participants are golfers, these experiences also bring in a significant audience of non-golfers (with diverse demographics) and expose them to the concept of traditional golf
 - A.G.E. exposes golf in a comfortable, fun, non-threatening environment, yet highlights many of the most appealing aspects of traditional golf, e.g., friendly competition, social camaraderie, etc. Importantly, all A.G.E. average 2 hours or less
- Compared to the general population of non-golfers, a much higher proportion of A.G.E. non-golfer participants have an interest in playing traditional golf (30-50% vs.11%)
- A third or more of A.G.E. participants indicate their experience with A.G.E. increased their interest in playing traditional golf
- Many A.G.E. participants interested in playing the traditional game aren't aware of beginner programs to get started
- A.G.E. are not hurting the traditional game of golf. They increase engagement and frequency of play among current golfers
- A.G.E. increase interest in golf fandom

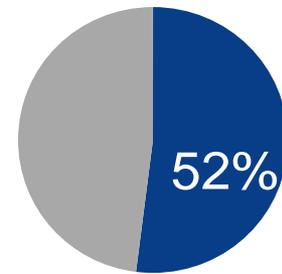
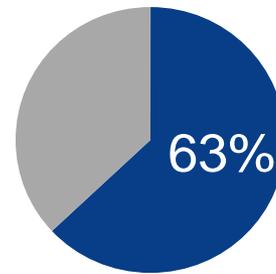
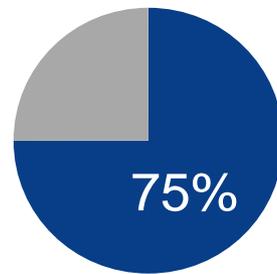
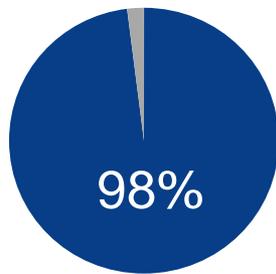
Net: There is an opportunity to leverage A.G.E. as a pathway to traditional golf

A.G.E. PARTICIPANTS

While many who participate in A.G.E. are golfers, these off-shoots of the traditional game also attract a large number of non-golfers with diverse demographics.

- Among non-golfers, exposure to A.G.E. have resulted in an increased interest in both playing traditional golf and watching golf on television.

Golfers | Non-golfers



N/A due to prevalence of golfers

Middle Income

Younger, Female, Minority

Younger, Hispanic, Middle Income

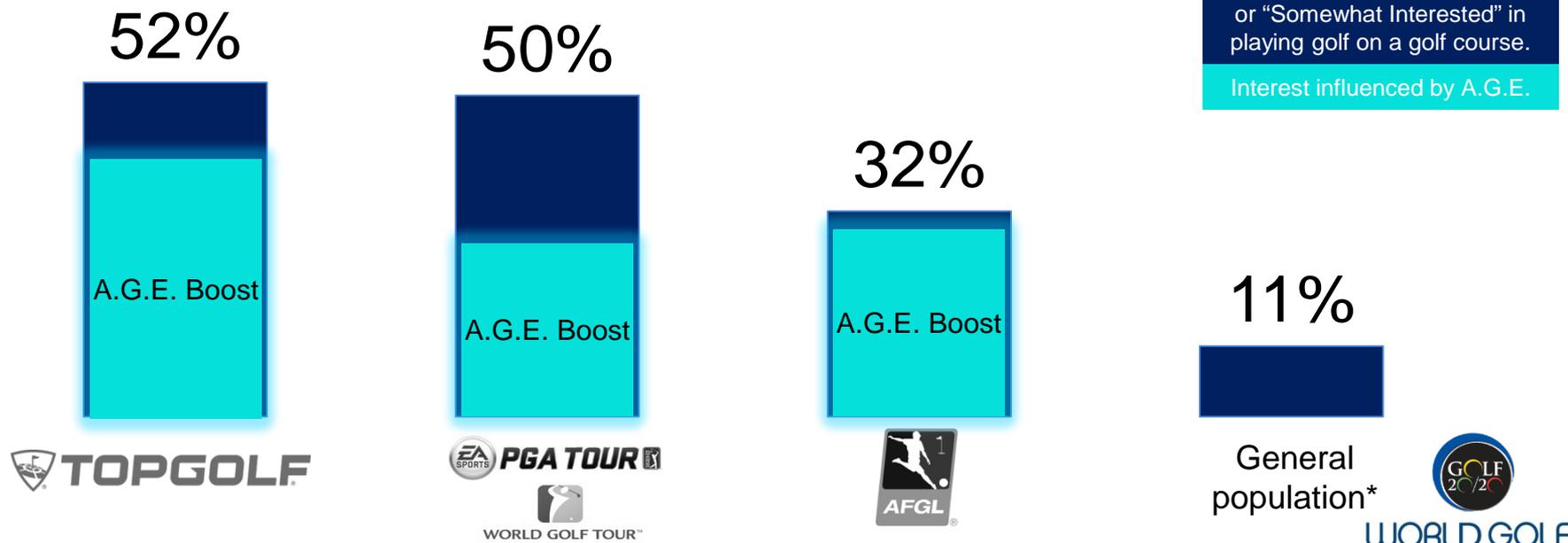
Key demographic skews vs. traditional golf

NON-GOLFER IMPACT : INTEREST IN PLAYING TRADITIONAL GOLF

Compared to the general population of non-golfers, non-golfing A.G.E. participants are much more likely to have an interest in playing the traditional game (30-50% vs.11%).

Many A.G.E. participants indicated that their experience with A.G.E. has increased their interest in playing (“A.G.E Boost” below). All impacts are significant, but Topgolf is especially effective.

A.G.E. Latent Demand (and A.G.E. influence)



Simulator Golf N/A
due to prevalence of golfers

*Data from Physical Activity Council



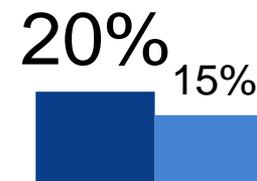
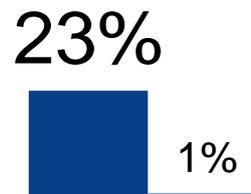
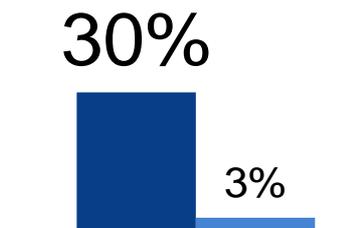
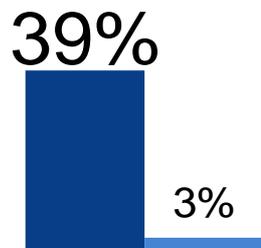
GOLFER IMPACT : TRADITIONAL GOLF ROUNDS PLAYED

Contrary to speculation by some in the traditional golf industry, participation in A.G.E. does not negatively impact golfers' consumption of the traditional game of golf.

- In fact, A.G.E. generally increases golfers' engagement with the traditional game, including the frequency that they play.

The most evident of these relationships is Simulator Golf, where many turn to refine their game and then take it to the traditional course.

*Play traditional golf more often because of A.G.E. participation
(among A.G.E. traditional golfers)*

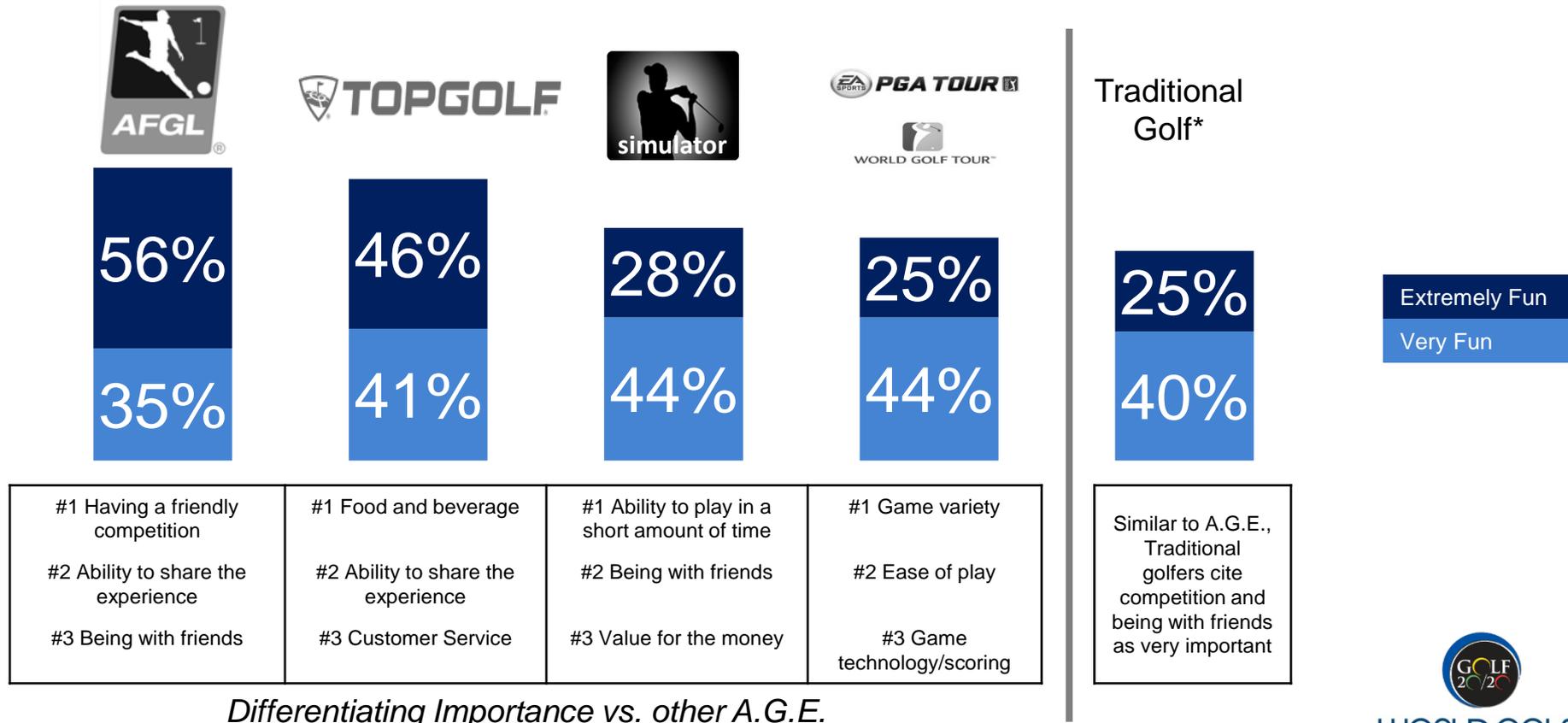


Play more
Play less



DELIVERING ON FUN

Having FUN is the number one desire of all A.G.E. participants. Traditional golf is comparable to simulator golf and video game golf, but lags behind the relatively newer activities of Topgolf and FootGolf



*Data from Physical Activity Council and Project M



OVERALL EVALUATION: EACH A.G.E. BRINGS SOMETHING TO THE TABLE FOR TRADITIONAL GOLF



Topgolf has the strongest potential for attracting non-golfers and converting them to traditional golf

Exposes many younger and demographically diverse (Young, Women, Minorities) non-golfers to the game



Video game golf is played by golf enthusiasts...if they don't play golf, many happen to be lapsed golfers who remain fans of the game

This A.G.E. acts as an additional source of engagement for this group; keeping them interested in watching the game on TV



FootGolf brings a new demographic to the golf course (Young, Hispanic, Middle Income)

Generates the most "buzz"...It's the most shareworthy on social media, and is the most recommended by participants



Simulator players consist of mostly traditional golfers seeking game improvement.

The activity has a positive influence on golfers' engagement with the traditional game, including an increase in rounds played

