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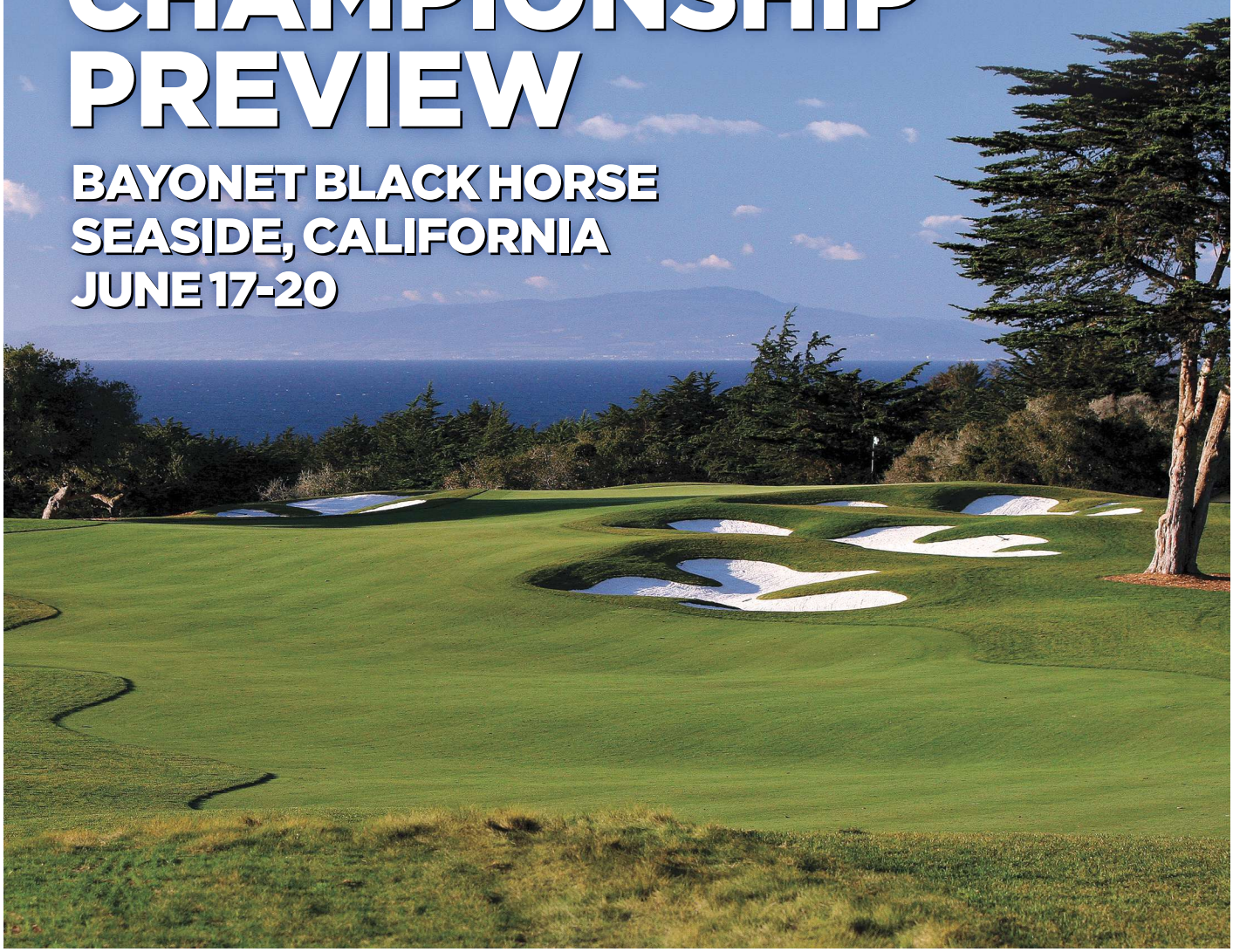
PGA PROFESSIONAL CHAMPIONSHIP PREVIEW

BAYONET BLACK HORSE SEASIDE, CALIFORNIA JUNE 17-20



Hot Trend

By Scott Kramer,
Contributing Equipment Editor

Survey Spotlights Equipment Trends

2018 Golf Market Outlook shows the importance of PGA Professionals in the equipment purchasing process for avid golfers

For the past 10 years, Sports and Leisure Research Group has been surveying avid golfers about their attitudes toward the present and future of the game. For the firm's new 2018 Golf Market Outlook – conducted in partnership with *Golf Magazine* – more than 1,000 active golfers shared their views via an online survey. The results show multiple positive trends for the golf equipment business, and the PGA Professional's importance to equipment sales and the overall enjoyment of the game.

"When you do a study like this for as long as we have, you're always looking for what's fresh and what stands out in the data," says Jon Last, Founder and President of Sports and Leisure Research Group. "It's great to see consumers confirming the role of PGA Professionals in purchasing golf equipment – it's something we knew intuitively, but it's borne out by our research. And it stands out to see how important the PGA Professional is in helping golfers make decisions on equipment purchases."

For example, the 2018 Golf Market Outlook shows that 62 percent of respondents said quality service can make the ultimate difference in what they buy, which is up from 57 percent last year. Among the top 10 factors respondents consider in determining equip-

Top 10 Factors in Determining Equipment to Buy

- When purchasing golf equipment, half of golfers find demoing clubs extremely important; those with a Handicap Under 10 are significantly more likely to agree with these statements than any other segment

Top 3 Box Summary	Total	Super Avid	Private Club Members	Handicap Under 10
Demoing clubs at a golf store, golf club, pro shop, driving range	50%	57%	61%	72%
Demoing/trying clubs on the golf course	44%	53%	64%	70%
Talking to friends or other golfers	35%	36%	37%	40%
Talking to teaching or club pros	31%	40%	54%	44%
Going to an off course golf store	29%	28%	17%	24%
Going to a pro shop on a golf course,	28%	39%	55%	50%
Going to a sporting goods store	27%	22%	16%	19%
Researching/read articles in golf magazines	24%	27%	23%	29%
Accessing, reading or researching online golf publications or independent web sites	23%	23%	20%	30%
Visiting golf retailer websites online	21%	22%	17%	29%

Source: SLRG Omnibus 2018

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The survey results show golfers find demoing golf clubs and getting feedback from peers and golf professionals very important to the purchasing process, with resources such as web searches and looking at catalogs having much less of an impact in the purchase process.

Other Top Factors in Determining Equipment to Buy

- One fifth of golfers and more than one third of those with a handicap under 10 visit the equipment company websites online before making a purchase decision

Top 3 Box Summary	Total	Super Avid	Private Club Members	Handicap Under 10
Visiting equipment company websites online	20%	22%	19%	36%
Using/trying other golfer's clubs	20%	20%	18%	31%
Google Search	16%	14%	12%	13%
Talking to salespeople	15%	14%	14%	11%
Looking at catalogs with golf equipment	11%	12%	6%	12%

Source: SLRG Omnibus 2018

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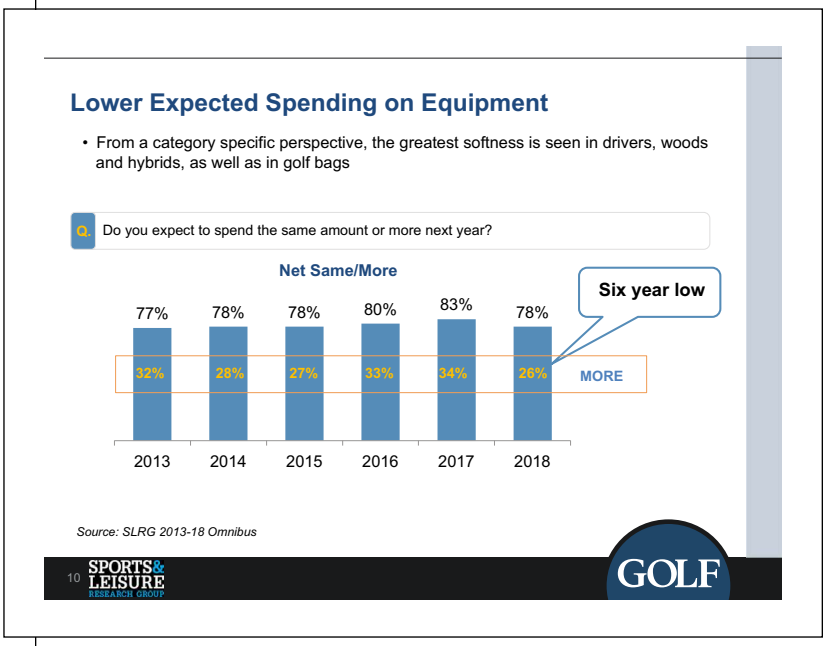
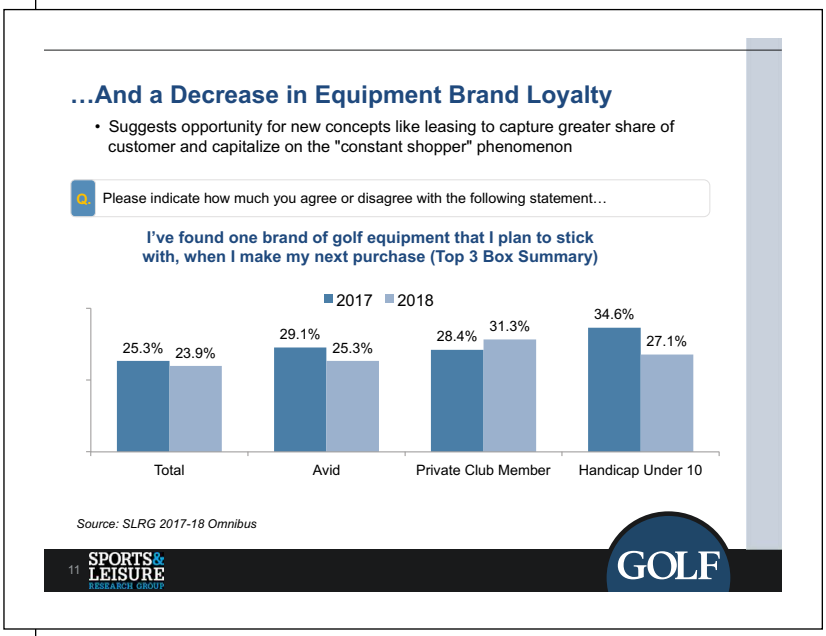


The number of golfers who plan to spend the same amount or more on equipment this year is at a six-year low, and equipment brand loyalty is decreasing, two trends that may show golfers balking at higher prices and looking for value over brand affinity.



ment purchases, demoing clubs at a shop or range, demoing clubs on course, and talking to teaching or club professionals were three of the top four responses. Among better players – those with a handicap under 10 – 50 percent said going to an on-course shop was important in their equipment purchases, while 44 percent said talking to teaching or club professionals influenced their decisions.

"The importance of demoing clubs has gotten even more critical to consumers as price points have gone up and as technology has improved to increase equipment's impact on the game," Last says. "The consumer doesn't really understand all of the technology and how it impacts their game, but a PGA Professional can explain it. Those who can speak to the sophistication of equipment design and technology really shine in helping golfers make these decisions."

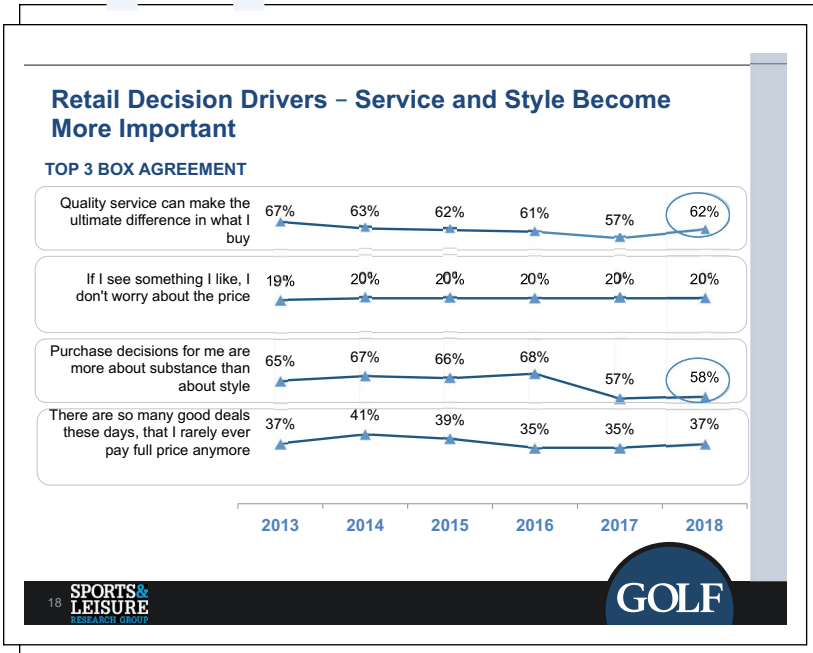
The 2018 Golf Market Outlook also found that just one in five respondents visit equipment company websites for online research, and only 11 percent look at golf equipment catalogs. Last says this shows that consumers are looking for authentic, personalized recommendations that can come from PGA Professionals.

"People are looking for objectivity when they're making an equipment purchase. Company websites and catalogs are great for showing what's new and different, but consumers view them with a certain level of skepticism," Last says. "They want to have someone provide an objective perspective about what will help their game – not what helps tour professionals, engineers and designers think. The average golfer is still not breaking 100, and they want someone with experience and knowledge of their abilities to interpret what new equipment means to their game.

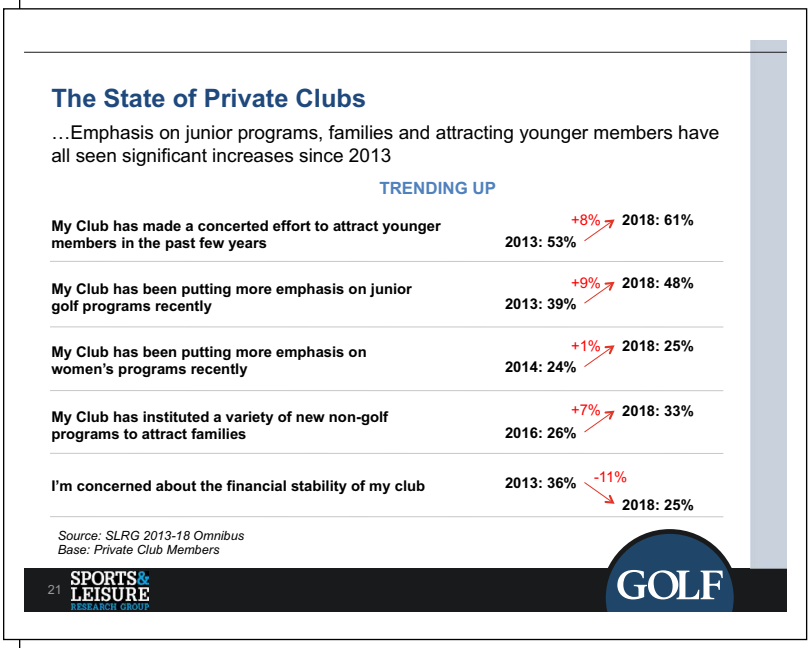
"Tour acceptance might put a brand into the mix of what a golfer is considering, but of much higher value is the opinion of someone who's got a relationship with them, like a peer or a PGA Professional."

The survey points out a number of other implications for the golf equipment market this year and in the near future. For example, while golfers are optimistic about the economy and expecting to play the same amount or more, the number of respondents who said they were planning to spend more money on golf equipment hit a six-year low. Last believes this is a reaction to the increase in equipment prices over the past two years, in particular the return of the $499 price point for some premium drivers. The higher price points were accepted last year, but sentiment may have shifted going forward.

Changing consumer behaviors – such as



After years of decline, quality service and substance are on the rise as important factors in equipment purchase. Meanwhile, private golf club members are feeling positive about new programming and approaches, as well as the financial stability of their clubs.



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being conditioned to paying for items such as smartphones on a subscription-like lease – may open the door for new concepts such as equipment leasing, which some OEMs are already testing.

Responses to the survey also showed a decrease in brand loyalty toward equipment companies. This is a result of consumers seeking greater value from their purchases, regardless of brand loyalty. Last says this is an area where PGA Professionals can also show their influence.

"I think the great opportunity for the PGA Professional in terms of a decrease in brand loyalty is that your golf professional gives great guidance on what's best for a golfer," Last says. "If someone's looking for a driver, there's a fairly finite set of brands that are under consideration. The decision is going to come down to the numbers on the launch monitor or the ball flight you see when demoing clubs, and the PGA Professional is the trusted expert with the authenticity to help make that decision."

The 2018 Golf Market Outlook also delves into attitudes toward private golf clubs, and the news there is encouraging. The data suggests that membership losses were down compared with 2016, with memberships remaining flat to consistent. Concern among private club respondents to the survey about the financial stability of their clubs was down 11 percent from 2013.

There was also a rise in the number of respondents who believe their private clubs are making a concerted effort to attract young members, emphasize junior golf and institute a variety of new non-golf programs for families since 2013.

"There's clearly a recognition that the evolution of private clubs has broadened to be well beyond just what happens between the first tee and the 18th green," Last says. "The private club is becoming a pillar of leisure time for the family – it's less about the golf course than facilitating a welcoming experience for the whole family.

"Clubs that have made the investment in terms of infrastructure, focus and marketing are seeing the benefits, and a lot of the responsibility for those areas fall on the PGA Professional. Providing enhanced food & beverage options, social opportunities and keeping golfers connected with the club – these are table stakes now for private clubs."

To see highlights of the 2018 Golf Market Outlook from Sports and Leisure Research Group and *Golf Magazine*, along with additional surveys and resources, PGA Professionals can log on to sportsandleisureresearch.com. More in-depth results are also available on a custom basis. ■