

PLAY GOLF AMERICA

2009 ANNUAL REPORT





PLAY GOLF AMERICA

Play Golf America, an innovative growth-of-the-game initiative that was launched in 2004, continues to play a vital role in helping the industry increase participation among new and existing golfers, and attract former golfers back to the game. The industry-wide comprehensive marketing campaign directs consumers to use PlayGolfAmerica.com, where golfers are linked with PGA and LPGA Professionals to find fun and affordable programs in their area.

Over the past six years, Play Golf America has exploded in terms of programs, resources and participation among host facilities and consumers. Millions of people nationwide continue to take advantage of free and low-cost Play Golf America programs as they gain a greater appreciation for golf as a fun sport to play with friends and the entire family.

In 2009, consumer and professional participation rates remained strong and there continue to be successful reports of facilities generating increased business and greater player retention by hosting programs.

2009 HIGHLIGHTS

- With more than 1,130 certified facilities, Get Golf Ready, a new, nationally branded learn-to-play initiative, exceeded expectations by more than 60 percent
- 7,415 golf facilities – a record number – hosted at least one Play Golf America program
- 648,000 golfers took part in group instruction taught by PGA and LPGA Professionals
- 6.7 million golfers participated in leagues and outings
- 260,000 consumers took part in Play Golf America national promotions
- More than 100,000 people were treated to complimentary golf experiences through a variety of consumer events

While these numbers are significant, the real measure of success is the impact to business at the facility level.

	Hosts	Ave. Consumers per Host*	Financial Impact per Host	New Customer
PGA FREE FITTING & TRADE-UP	3,031 Professionals	12 Fittings	\$3,210	36%
PGA FREE LESSON MONTH	5,241 Professionals	15 Lessons	\$1,670	57%
AMERICAN EXPRESS WOMEN'S GOLF MONTH	1,185 Sites	25 Golfers	\$1,480	52%
FAMILY GOLF MONTH	1,197 Sites	82 Golfers	\$4,310	35%
AMERICAN EXPRESS/PGA FRIEND OF A CARDMEMBER	1,721 Professionals	10 Lessons	\$896	48%
PGA FAMILY COURSE (AND SIMILAR PROGRAMS)	540 Sites	492 Rounds	\$6,400	-

GROWING THE GAME WITH PLAY GOLF AMERICA

“Play Golf America offers resources that I don’t think everyone knows are there. I’m reaching every aspect and segment of my membership through programs listed under Play Golf America.”

J.T. Crawford, PGA
Head Professional at New Orleans Country Club in Louisiana.

7,415

Record number of facilities hosting a Play Golf America Program

PLAYGOLFAMERICA.COM

PlayGolfAmerica.com continues to serve as the central resource for information for golfers of all abilities. Consumers are directed to PlayGolfAmerica.com to find fun and affordable programs being delivered by PGA and LPGA Professionals.

Each year since its inception, PlayGolfAmerica.com has seen increases in traffic as well as facility utilization. Overall unique visitors grew throughout 2009 to more than a half million – a 16 percent increase over the prior year. Meanwhile, total page views totaled 2.2 million – a spike of 22 percent from 2008.

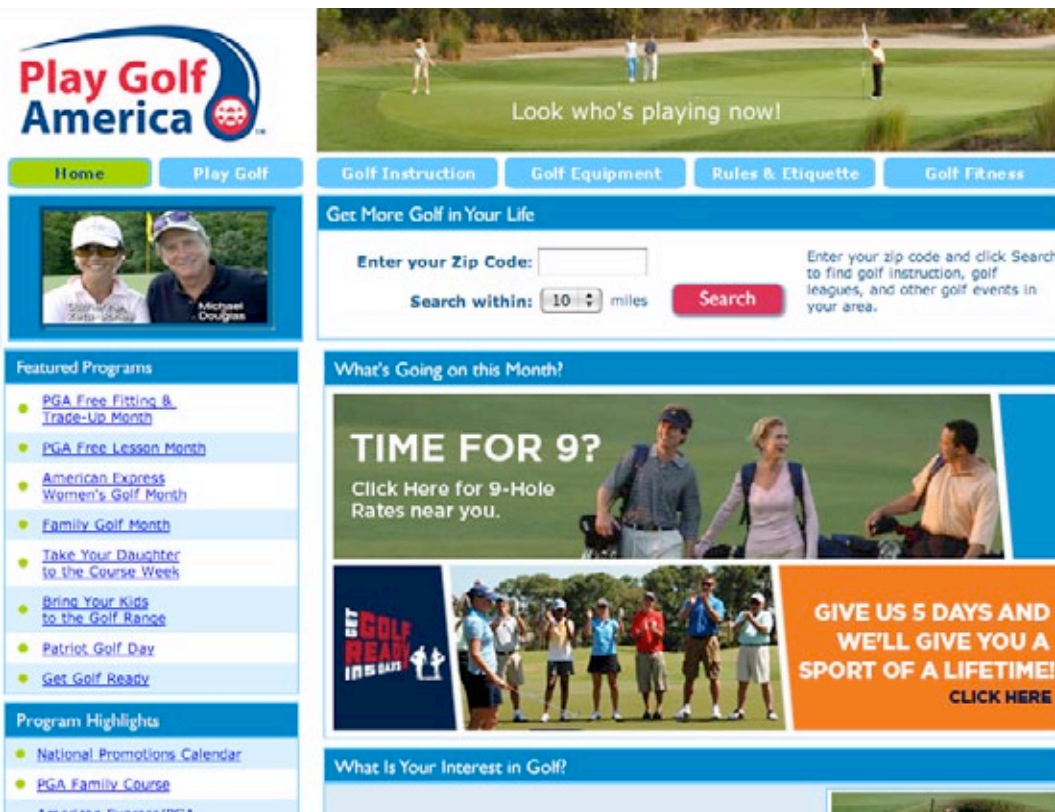
2009 RECORD HIGHLIGHTS:

- Nearly 5,300 facilities actively promoted their player development programs on the site
- More than 15,000 unique events were scheduled and posted
- Number of consumer online registrations increased by 160 percent, to 33,500

In addition to providing prominent placement to traditional initiatives such as PGA Free Lesson Month and Family Golf Month, several new programs were added including Get Golf Ready, Time For Nine and Junior Rates. The average time spent on the site and pages viewed by visitors were both about 5 percent greater than the record figures from 2008.

2009 PLAYGOLFAMERICA.COM TOP PAGE VIEWS

1. Play Golf America Home Page
2. Get Golf Ready
3. Facility Searches
4. PGA Free Lesson Month
5. Patriot Golf Day®
6. Family Golf Month
7. Instruction
8. American Express/PGA Friend of a Cardmember
9. American Express Women's Golf Month
10. PGA Free Fitting & Trade-Up





WIDESPREAD MEDIA ATTENTION

Ongoing public relations, advertising and promotions have played a significant role in the success of Play Golf America. By focusing on messages that promote golf as a fun, affordable and healthy sport that provides a meaningful way to spend time with friends and family, these efforts drive consumers to PlayGolfAmerica.com.

In 2009, Play Golf America Public Service Announcements (PSAs) and media placements accounted for 1.17 billion impressions, valued at \$45.7 million. Continued inventory of PSA spots provided by The PGA of America, USGA and LPGA as part of tournament telecast packages on CBS, NBC, TNT, ESPN and Golf Channel, were among the primary drivers.

2009 HIGHLIGHTS:

- Get Golf Ready was the focal point of The PGA's one-hour show that aired on CBS Sports in May and re-aired again in October. The program utilized a "reality TV" format with six new and former golfers receiving instruction from leading PGA/LPGA Professionals.
- The new "Pack Your Bags" PSA launched in May 2009, using a family getaway theme to show how fun and affordable the game can be.
- The Play Golf America Facebook page was created in the spring.
- Alday Communications was able to garner placements in highly respected media, including ***USA Today, The New York Times, Sports Illustrated, Wall Street Journal, Golf Channel, Golf Digest*** and ***Golf World***.
- PGA of America officials and PGA Professionals promoted Play Golf America on more than 2,250 local, regional and national radio outlets, including Sirius XM, ESPN, Sports Byline and Armed Forces network radio.
- The Play Golf America logo was updated to more clearly project "golf" and better convey the sport as fun and lively.

1.17 BILLION Media Impressions
in 2009



NATIONAL PROMOTIONS

An expanding series of Play Golf America retail promotions continued to serve as an effective strategy to generate media exposure, drive people to PlayGolfAmerica.com and, most importantly, connect them with fun and affordable programs in their local area. Host facilities report these promotions are attracting golfers and generating incremental sales.

The equipment-based **PGA Free Fitting & Trade-Up Month**, instruction-based **PGA Free Lesson Month**, **American Express Women's Golf Month** and **Family Golf Month** remained the primary national promotions.

2009 HIGHLIGHTS:

HOST PARTICIPATION

- PGA Free Lesson Month continued to garner the highest level of participation, with 5,241 PGA and LPGA Professionals
- Family Golf Month host facilities have increased each year, growing to 1,197 facilities in 2009
- The number of facilities hosting at least one promotion has continued to increase each year, with a record high of 7,415 facilities in 2009

CONSUMER PARTICIPATION

- The average number of participants at the facility level for each promotion has remained steady since Play Golf America was started in 2004. The top program in 2009 was Family Golf Month, averaging 82.3 participants per facility.
- Women's Golf Month (34 percent) and Family Golf Month (30 percent) have the highest percentage of new golfers
- PGA Free Lesson Month (57 percent) has been the best national promotion to attract customers new to the facility
- PGA Free Fitting & Trade-Up Month participants tend to be adult males and existing golfers

FINANCIAL IMPACT

PGA and LPGA Professionals also report success in using these promotions to generate follow-up business in instruction, tee times, merchandise, leagues and memberships.

The median revenue generated by host facilities:

- Family Golf Month \$4,310
- PGA Free Fitting & Trade Up Month \$3,210
- PGA Free Lesson Month \$1,670
- American Express Women's Golf Month \$1,480

Considering the success of these promotions, Play Golf America National Promotions have expanded to include:

Get Golf Ready: Nationally branded learn-to-play program and the most significant new initiative since Play Golf America was launched - more than 1,130 certified facilities.

American Express/PGA Friend of a Cardmember: Allows American Express® Cardmembers who book and pay for a lesson using their American Express Card to bring a friend at no additional cost. In 2009, those actively involved averaged 9.6 lessons and generated \$896 through this program.

Time for Nine/9-Hole Rates: By promoting 9-hole rounds as an affordable way to play golf, a search for 1,400 facilities offering 9-hole rates was added to PlayGolfAmerica.com.

NATIONAL PROMOTION SUCCESS

“National Promotions have led to happy consumers, generated lesson revenue and new students that I may not have had the opportunity to recruit”

Tom Speicher, PGA
Director of instruction at Butternut Golf Course
and Driving Range in Jamesville, N.Y.

\$4,310

Median Revenue generated from
Family Golf Month

GET GOLF READY

Play Golf America's newest National Promotion, "Get Golf Ready in 5 Days," was the biggest and most exciting addition of the year.

Based on traditional programs such as Link Up 2 Golf and PGA First Swing, combined with direction from consumer focus groups, Get Golf Ready is designed as an approach to teach new golfers in five short lessons and prepare them to get onto the golf course with confidence.



Response from the golf community was tremendous as more than 1,130 facilities were certified to offer Get Golf Ready by the end of the fiscal year, exceeding expectations by 60 percent. Of the certified facilities, 69 percent were public, and 19 percent were private (see chart for complete details).

The PGA of America produced a one-hour TV show dedicated to Get Golf Ready, which aired on CBS Sports in May and then again in October. The show utilized a "reality TV" format, with six new and former golfers going through the Get Golf Ready steps while receiving instruction from leading PGA/LPGA Professionals. A follow-up story in *PGA Magazine* reported all six were still engaged and enjoying golf!

These targeted efforts helped produce significant results. Based on 699 facilities reporting in September:

- More than 17,000 students have gone through Get Golf Ready Group Lesson programs
- An average of 25 students per facility
- 86 percent of the students were new or former golfers
- 61 percent were women
- 25 percent were minorities

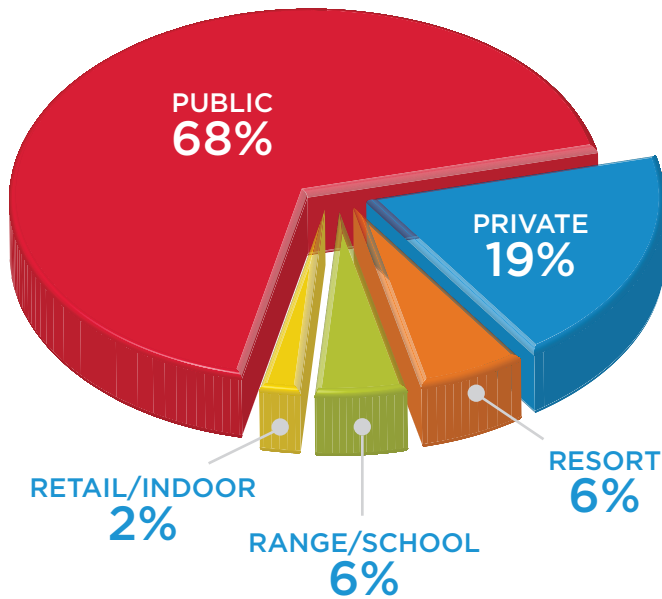
These targeted efforts helped produce significant results. Based on 699 facilities reporting in September:

- 82 percent came back to the range
- 76 percent had played at least one round by September



GET GOLF READY FACILITIES

The number of registered Get Golf Ready Facilities has exceeded expectations by nearly 60% with more than 1,130 certified facilities.



ATTRACT NEW GOLFERS WITH GET GOLF READY

“After hearing about Get Golf Ready, I just knew it was a perfect fit for our facility. We typically have a pretty diverse population at our facility and Get Golf Ready is attracting a good mix of people from across the board to the game. I think this is exactly what they had in mind when developing the program.”

Tim Krebs, PGA
General Manager at East Potomac Golf Course in Washington, DC.

1,130

Get Golf Ready Facilities,
60% more than projected



DIVERSITY

An important strategic direction for Play Golf America is promoting golf to everyone across the country, by utilizing proactive initiatives to foster diversification of the game. A variety of efforts were used to successfully target specialize audiences throughout 2009.

WOMEN

Dedicated to promoting diversity, The PGA of America and allied associations have further welcomed women to the game by providing programs and activities designed to attract new female golfers and re-energize occasional women golfers. While American Express Women's Golf Month is the most visible promotion, other efforts included:

- Women's Play Golf America Days being expanded to five sites in 2009
- National Promotions continuing to attract women, especially the new Get Golf Ready, with women accounting for 61 percent of the students
- Executive Women's Golf Association remaining a significant industry advocate for women's golf - network of nearly 20,000 members with more than 125 chapters across the United States, Canada and France

MINORITIES

In 2009, minorities accounted for a significant portion of participation in various programs, including:

- Get Golf Ready, 25 percent
- Consumer Events, 31 percent
- PlayGolfAmerica.com online registrations (26 percent)

Cooperative programs with organizations such as the National Society of Black Engineers, Pan American Golf Association and North Carolina A&T University have helped account for these figures, as well as hosting Play Golf America events in targeted markets.

The launch of the USGA-PGA junior golf initiatives also included strategies for diversity. In its pilot year, PGA Sections that were involved were directed to bring the After School Program to communities with higher rates of minority population. As a result, 47 percent of the students were minority.

GOLF FOR INDIVIDUALS WITH DISABILITIES

Promoting golf to individuals with disabilities continues to be a focus for Play Golf America:

- PlayGolfAmerica.com hosted a search of more than 1,000 PGA Professionals experienced in instructing individuals with disabilities
- As part of PGA Free Lesson Month, these professionals were cross-promoted, and they reported giving nearly 800 10-minute lessons to individuals with disabilities
- The PGA also expanded its relationship with trick-shot artist Dennis Walters to bring his inspirational show to 10 special events where special interest groups were attending

COLLEGE STUDENTS

The Play Golf America University initiative continued as a PGA of America college and university golf program that is designed to teach and engage students in the game through PGA Professional instruction and other golf programs.

2009 HIGHLIGHTS:

- Play Golf America University was offered at 42 colleges with more than 2,500 students taking part in “Learn to Play” classes
- Of the 2,500
 - 60 percent were new to the game
 - 30 percent were women
 - 29 percent were minority
 - 99 percent said they plan to continue playing golf





FAMILIES AND JUNIOR GOLF

With traditional programs such as Take Your Daughter to the Course Week and Kids Play Free, families have always been a target for Play Golf America. Especially with the shift in American culture over the past decade towards a more family-centric lifestyle, Play Golf America positions golf as a perfect recreation for families to play and enjoy together.

2009 HIGHLIGHTS

Family Golf Month was the most successful of all the national promotions in terms of:

- Average participants (82.3)
- Total consumer reach (98,550)
- Financial impact per facility (\$4,310)

Additional successful family initiatives included:

- The NGCOA's Take Your Daughter to the Course Week
 - 1,200 host golf courses
 - Average of 32 golfers
- 540 facilities reported offering the PGA Family Course or similar short course programs.
 - Averaged 492 rounds at \$13
 - Facilities realized \$6,400 in golf fees

JUNIOR GOLF

As part of a strategic effort for a more formalized approach to developing junior golfers, several steps for more prominent and aggressive initiatives were initiated. A first step was expanding junior golf content on PlayGolfAmerica.com and adding junior activities as a program type.

The United States Golf Association and The PGA of America announced a partnership for a Junior Golf Program in 2009 that focuses on expanding the number of junior golfers while fostering life-long participation in the game. The USGA-PGA partnership began with two initiatives:

- **After Schools Program:** Piloted in eight PGA Sections (Dixie, Illinois, Indiana, New Jersey, Northern Texas, South Florida, Southern California and Wisconsin) the six-week development activity was offered as a next step to support in schools programs.
 - Conducted at 44 schools with 48 PGA Professionals providing instruction to more than 1,000 students
- **Course Access Pass:** Promoting special and discounted greens fees for juniors, with some 1,400 golf facilities already offering junior rates. In 2010, this will expand to a more formalized program to include online rules, etiquette and skills tutorials.

Other industry-based junior golf programs promoted under the Play Golf America umbrella included:

- **Sticks for Kids:** Delivered by the NRPA and GCBA, this program grew to more than 400 host facilities in 2009. By providing hosts with 10 sets of US Kids junior golf clubs, facilities report an average of 170 kids taking advantage of these resources.
- **LPGA-USGA Girls Golf:** Offered at 182 different chapters, with LPGA and PGA Professionals providing all the instructions for comprehensive golf experiences that reached an average of 32 girls each in 2009.

Over and above these branded programs, PGA and LPGA Professionals continue to offer junior programs at the grass roots level as a mainstay for player development. According to 2009 reports, 72 percent of PGA Professional-managed facilities offered some type of a junior camp with an average of 74 juniors.



PLAY GOLF AMERICA DAYS AND CONSUMER EVENTS

In 2009, for the first time, the combined reach from all consumer events exceeded 100,000 people.

2009 RECORD HIGHLIGHTS:

Through the traditional Play Golf America Days, PGA Sections and their Professionals:

- Reached nearly 22,000 golf enthusiasts in 60 Play Golf America Days
- Expanded the use of inflatable nets to more than 80 pre-existing consumer events, giving golf exposure to a diverse audience of some 37,000 people

In 2009, these Play Golf America experiences were brought to eight WNBA games, Major League Baseball, NCAA Hockey, NHL Hockey, NCAA Football, NSL Soccer, NASCAR races, as well as at shopping malls and business conferences.

Another highlight was the PGA Learning Center presented by American Express at the 91st PGA Championship at Hazeltine National Golf Club. This on-site 6,000-square-foot tent included hitting bays, putting greens, chipping greens and simulators designed to give spectators a free, fun and interactive golf experience. More than 75 PGA Professionals from the Minnesota Section welcomed a record 42,000 visitors plus provided instruction directly to 4,035 spectators throughout the week.

The LPGA coordinated similar initiatives as they hosted “Front Row Experiences” at seven LPGA Tour and Duramed Futures Tour events. Space was sectioned off on actual tournament practice ranges as LPGA Teaching & Coaching Division Professionals volunteered to provide more than 1,500 spectators with free 10-minute lessons.

The real impact is using these events to drive activity follow-up golf programs. The PGA used a series of on-site promotional templates and post-event e-mails to link attendees with Play Golf America programs, especially Get Golf Ready.



PLAY GOLF AMERICA SUPPORTERS

Coming out of the 2003 GOLF 20/20 Conference, The PGA of America developed Play Golf America with the support of Allied Associations including the LPGA, NGCOA, PGA TOUR, USGA and others. Within a few short years, Play Golf America has firmly established itself as a highly respected, industry-wide initiative for impacting the growth and business of the game.

It is important to recognize the following organizations, companies and friends providing continued support of Play Golf America. The success and progression of Play Golf America is directly attributed to this industry-wide support and commitment.

TITLE AND PRESENTING SPONSORS:



GOLF ORGANIZATIONS:



PARTNER SPONSORS:





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