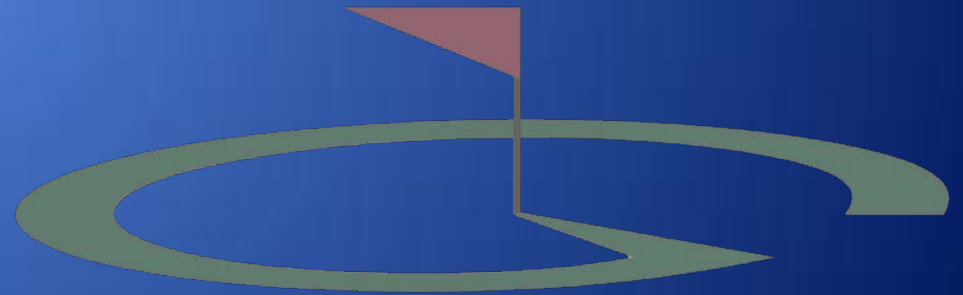


Primary Trends in Golf

...and What They Mean to You



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Change Everywhere

Typewriter

Payphone

Bubbler

Boom-box

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Current Trends Impacting Golf

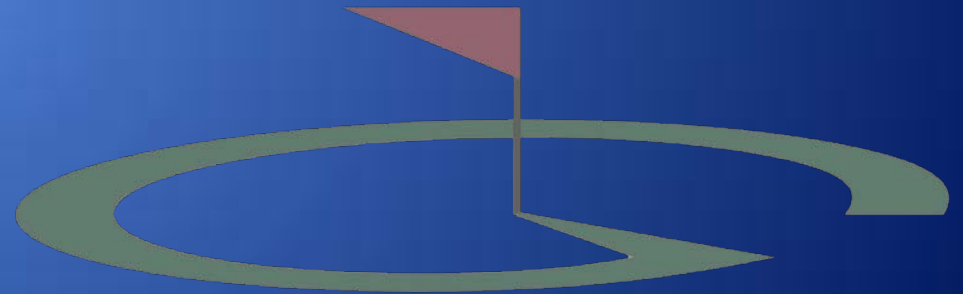
- Consumer Confidence
- Relevance
- Profitability
- Static/Stable Demand
- Supply Reductions



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Trend - Consumer Confidence

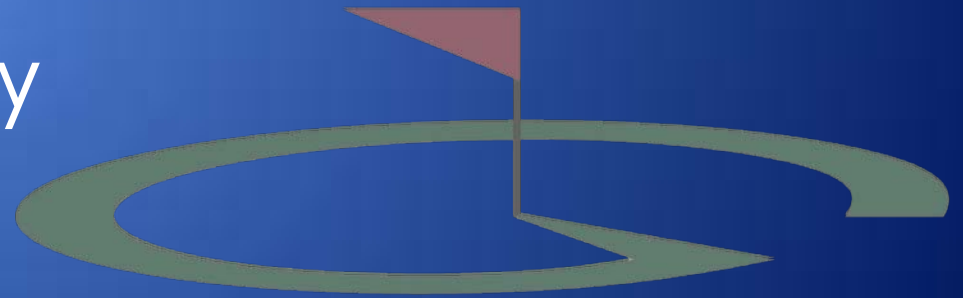
- Unemployment
- Debt Availability
- War and Peace



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Trend - Relevance

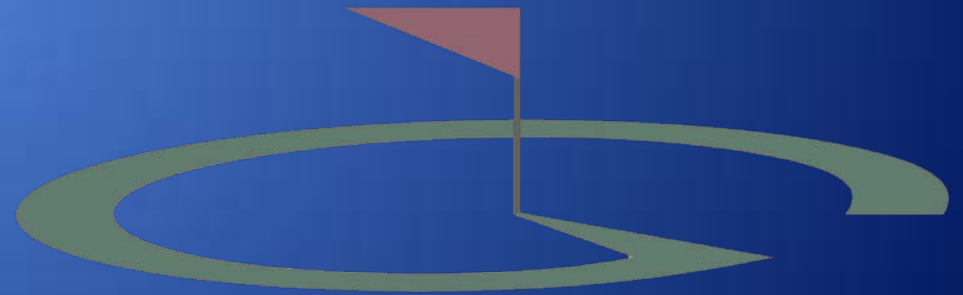
- Whether Golf *Matters*
- Four 'F' s
- Reference Points
- Time Priority



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Sense of Community

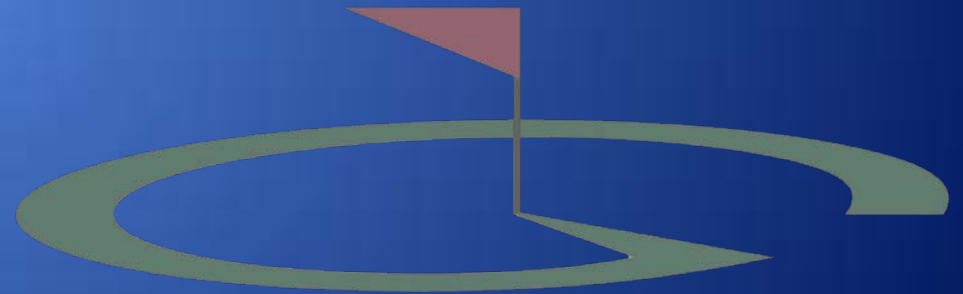
- Crowded/Various Choices
- Women Make the Choice
- Who YOU Are Is the Difference-Maker



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Popularity of the Game

- Stability
- Accessibility
- Aspirational Value
- Family-First



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Trend - Supply/Demand

- Supply in Steady Decline...Continuing
- Demand Stable...in Tough Economy
- Theoretical Growth Position



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Time for New Paradigm

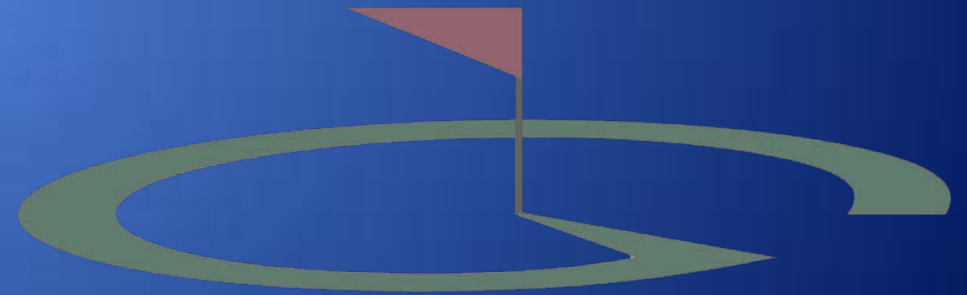
- Think like a customer.
- Customer Relationship Driven
- Changed Service Expectations
- New Ideas of 'Belonging'
- Accountability of Golf Resources



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Future Trends for Which to Prepare

1. Clanning
2. Safe Haven
3. Cocooning
4. Memberships
5. Aspiration
6. Little Things



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Clanning

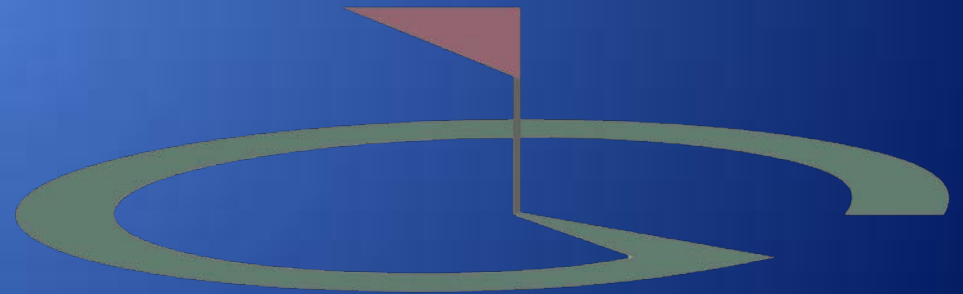
- Faith Popcorn – Futurist
- People Want to Be Around People Like Them
- Times/Events/Locations to Enable
- Create Linkage



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Safe Haven

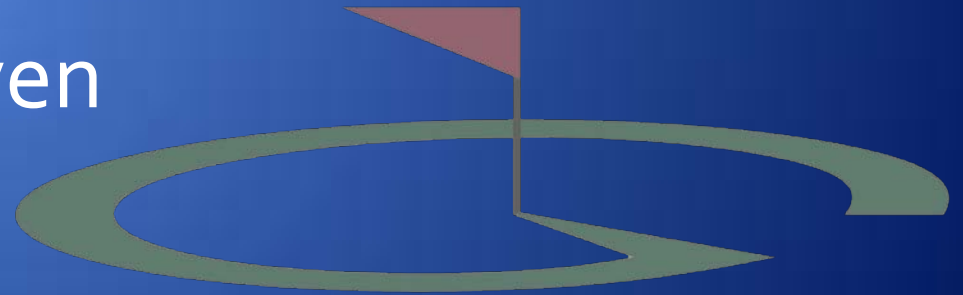
- Jon Last – Market Researcher
- Belonging Is Very Important
- Help in Troubled Times
- Families
- Friends
- Resources



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Cocooning

- Faith Popcorn
- Familiarity
- Freedom from Worry
- Sense of Safe Haven



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Memberships

- 'Full Golf' Is Slipping in Popularity
- Members Seek Packaged Sports/Fitness
- Driven by Women
- Creates Opportunities for All



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Aspiration

- NGF Statistics Indicate Desire to Play More Rounds
- Social Data Indicate Parental Hopes
- Teens/20's Surveys Show High Lifestyle Expectations
- Junior Programs Attract Growing Numbers



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The Next Little Thing

- Personal Service/Attention
- Togetherness
- Variable Memberships
- Consolidated Recreation
- Combined Technology
- Intrinsic Value



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Change You Can Manage

- Still playing with wooden clubs?
- Still hitting a 1, 2 or 3 iron?
- Still carry Calamity Jane?
- Still using cart-mounted GPS?



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Primary Trends

- Customer Relationships
- Service Expectations
- Changes in Supply
- Changes in Memberships
- Owner/Operator Accountability

Q & A

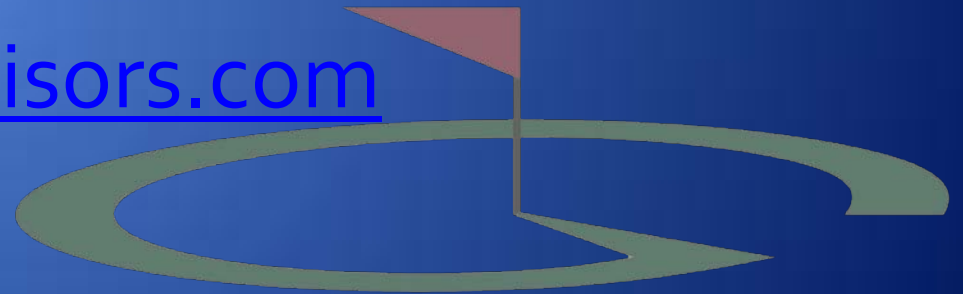
Henry DeLozier

Principal

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