

PGA FREE LESSON MONTH

The roots of PGA Free Lesson Month go back to 1998, and this ground-breaking program has been a mainstay in helping grow the game ever since, by engaging PGA Professionals to provide free-10 minute lessons each May. Designed to introduce new players to golf and help existing golfers improve their game, PGA Free Lesson Month strongly influenced the ultimate development of Play Golf America. LPGA Professionals were added in 2007, thereby enhancing the program as an industry-wide initiative.

From the beginning, *Golf Digest* has been an active partner with PGA Free Lesson Month, by listing thousands of participating PGA Professionals annually and promoting the program on several May covers. Over the years, *Golf World* and Golf Channel also have been involved. Nike Golf has served as the Official Sweepstakes sponsor throughout the Play Golf America era, with a highlight coming in 2008 through a cause-marketing donation of \$15,000 to the Tiger Woods Foundation.

FIVE-YEAR HISTORICAL FACTS & FIGURES (2004 TO 2008)

After Play Golf America was launched, PGA Free Lesson Month saw significant jumps in participation:

- Averaged 6,467 PGA and LPGA Professionals participating from 2004-2008 (68% increase over the first six years of the program, pre-Play Golf America)
- Averaged 114,890 annual free lessons given from 2004-2008 (91% increase over the first six years of the program, pre-Play Golf America)
- Totaled 574,450 free lessons given from 2004-2008

PGA Free Lesson Month consumer profiles have consistently shown:

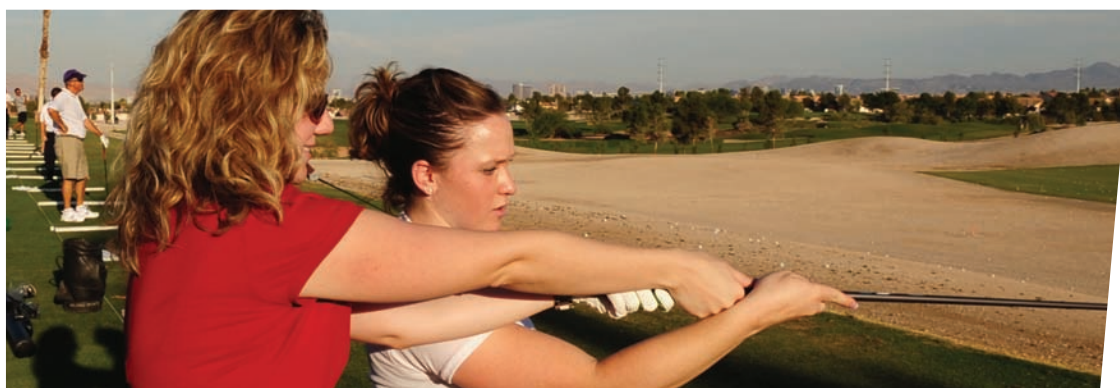
- 55% are New Customers
- 30% are Women
- 23% are New Golfers/Beginners

2008 BUSINESS GENERATORS

Professionals reported generating a combined median spend of \$2,560 from consumers following participation in PGA Free Lesson Month. While the retention rates remained consistent, the combined spend was a 4% increase over the previous year.

CONSUMER ACTIVITY FOLLOWING PGA FREE LESSON MONTH (MAY)	RETENTION RATES	MEDIAN SPEND PER CONSUMER
PURCHASED INSTRUCTION	32%	\$75
SIGNED UP FOR TEE TIMES	43%	\$50
PURCHASED EQUIPMENT/MERCHANDISE	22%	\$150
JOINED LEAGUE	6%	\$100
PURCHASED MEMBERSHIP	4%	\$900

Combined median spends are based on professionals promoting lessons, tee times, equipment, leagues and memberships.



FAMILY GOLF MONTH/ TAKE YOUR DAUGHTER TO THE COURSE WEEK

While Play Golf America was originally slated for adult player development, a cultural shift that placed a high demand on family time created an inherent evolution to expand the Play Golf America target audience to families.

The NGCOA developed Take Your Daughter to the Course Week in 2000 to support its members and encourage overall participation in golf, especially among girls and their families. This evolved into the first family-oriented National Promotion to fall under the Play Golf America umbrella. In addition to public relations support, Play Golf America PSAs that aired in June and July were often tagged with promotional graphics.

Combining the success of this promotion with new opportunities provided by the targeted audience, Family Golf Month was piloted in 2006 and has grown since. Each July, golf facilities host and promote their Play Golf America family activities. Popular programs designed to motivate families to play golf have included: Kids Play Free, Family Play Days, family tees, plus cross promotions with other family activities.

In 2007, the Golf Range Association of America teamed with *Golf Digest* for the Bring Your Kids to the Golf Range promotion, which provided another fun and affordable family activity to enjoy the game of golf. Other programs promoted under Family Golf Month included the Golf Course Builders Association of America and the National Recreation and Park Association's Sticks for Kids, LPGA/USGA Girls Golf and the PGA Family Course program.

FIVE-YEAR HISTORICAL FACTS & FIGURES (2004-2008)

After Play Golf America was launched, Take Your Daughter to the Course Week saw significant jumps in participation. The program:

- Averaged 1,150 facilities from 2004-2008
(155% increase over the first four years of the program, pre-Play Golf America)
- Averaged 68,800 annual golfers from 2004-2008
(675% increase over the first four years of the program, pre-Play Golf America)
- Had 344,000 total golfers participating from 2004-2008

Take Your Daughter to the Course Week consumer profiles have consistently shown:

- 37% are New Customers
- 28% are New Golfers/Beginners

2008 BUSINESS GENERATORS FOR ALL OF FAMILY GOLF MONTH

Program coordinators reported generating a combined median spend of \$4,740 per facility from consumers following participation in Family Golf Month.

CONSUMER ACTIVITY FOLLOWING FAMILY GOLF MONTH (JULY)	RETENTION RATES	MEDIAN SPEND PER CONSUMER
PURCHASED INSTRUCTION	23%	\$50
SIGNED UP FOR TEE TIMES	40%	\$35
PURCHASED EQUIPMENT/MERCHANDISE	16%	\$50
JOINED LEAGUE	12%	\$50
PURCHASED MEMBERSHIP	5%	\$400

Combined median spends are based on professionals promoting lessons, tee times, equipment, leagues and memberships.

AMERICAN EXPRESS WOMEN'S GOLF WEEK/MONTH

Finishing its fourth year, American Express® Women's Golf Month is aimed at increasing the participation of women in golf while making learning and playing golf fun in a women-friendly environment. Due to the overwhelming success of Women's Golf Week over the first three years, organizers extended the promotion to the entire month of June in 2008.

This has developed into a true industry collaboration as the EWGA, GCSAA, LPGA, NGCOA and The PGA of America co-manage this initiative with ongoing support from other leading organizations in golf, including the PGA TOUR, CMAA and the USGA.

As title sponsor since 2007, American Express has looked for creative ways to provide enhanced benefits for their cardmembers with added access to golf and golf programs. This past year the American Express Friend of a Cardmember program was cross promoted with Women's Golf Month.

FOUR-YEAR HISTORICAL FACTS & FIGURES (2005 TO 2008)

During this period, American Express Women's Golf Month has:

- Averaged 845 facilities, including more than 1,200 each of the past two years
- Averaged 26,400 annual participants
- Totaled 105,600 participants

American Express Women's Golf Month consumer profiles have consistently shown:

- 47% are New Customers
- 32% are New Golfers/Beginners

2008 BUSINESS GENERATORS

Program coordinators reported generating a combined median spend of \$3,320 from consumers following participation in American Express Women's Golf Month. Expanding to a month-long promotion helped grow this combined spend by 54% over the previous year.

CONSUMER ACTIVITY FOLLOWING AMERICAN EXPRESS WOMEN'S GOLF MONTH	RETENTION RATES	MEDIAN SPEND PER CONSUMER
PURCHASED INSTRUCTION	25%	\$60
SIGNED UP FOR TEE TIMES	36%	\$45
PURCHASED EQUIPMENT/MERCHANDISE	19%	\$100
JOINED LEAGUE	23%	\$100
PURCHASED MEMBERSHIP	6%	\$570

Combined median spends are based on professionals promoting lessons, tee times, equipment, leagues and memberships.



FREE FITTING & TRADE-UP MONTH

One of the newest Play Golf America National Promotions, PGA Free Fitting & Trade Month was established in 2006 to help educate consumers about properly fitted equipment and why it can make their golf experience more enjoyable. Over the past three Aprils, PGA Professionals have been providing free 15-minute club fitting sessions at golf facilities nationwide, with LPGA Professionals included in 2008.

The PGA of America partnered with *Golf Digest*, the PGA Trade-In Network and the PGA.com Value Guide in driving this initiative. In fact, the PGA Trade-In Network presents ongoing opportunities for golfers to trade in used clubs for credit and gain a cost saving towards the purchase of new equipment. Between 65% and 72% of participating Professionals offer this trade-in opportunity.

THREE-YEAR HISTORICAL FACTS & FIGURES (2006 TO 2008)

During this period, PGA Free Fitting & Trade-Up Month has:

- Averaged 3,106 PGA and LPGA Professionals participating, showing increases each year
- Averaged 33,750 annual free club fitting sessions
- Totaled 101,200 free club fitting sessions

PGA Free Fitting & Trade-Up Month consumer profiles have consistently shown:

- 38% are New Customers
- 16% are Women

2008 BUSINESS GENERATORS

Professionals reported generating a combined median spend of \$3,870 per facility from consumers following participation in PGA Free Fitting & Trade-Up Month. This includes \$2,382 in hard good sales, an 8% increase over the previous year.

CONSUMER ACTIVITY FOLLOWING PGA FREE FITTING & TRADE-UP MONTH	RETENTION RATES	MEDIAN SPEND PER CONSUMER
PURCHASED EQUIPMENT/GOLF CLUBS	45%	\$458
PURCHASED OTHER MERCHANDISE	33%	\$60
PURCHASED INSTRUCTION	25%	\$100
SIGNED UP FOR TEE TIMES	40%	\$60
JOINED LEAGUE	5%	\$55
PURCHASED MEMBERSHIP	5%	\$1,150

Combined median spends are based on professionals promoting lessons, tee times, equipment, leagues and memberships.

