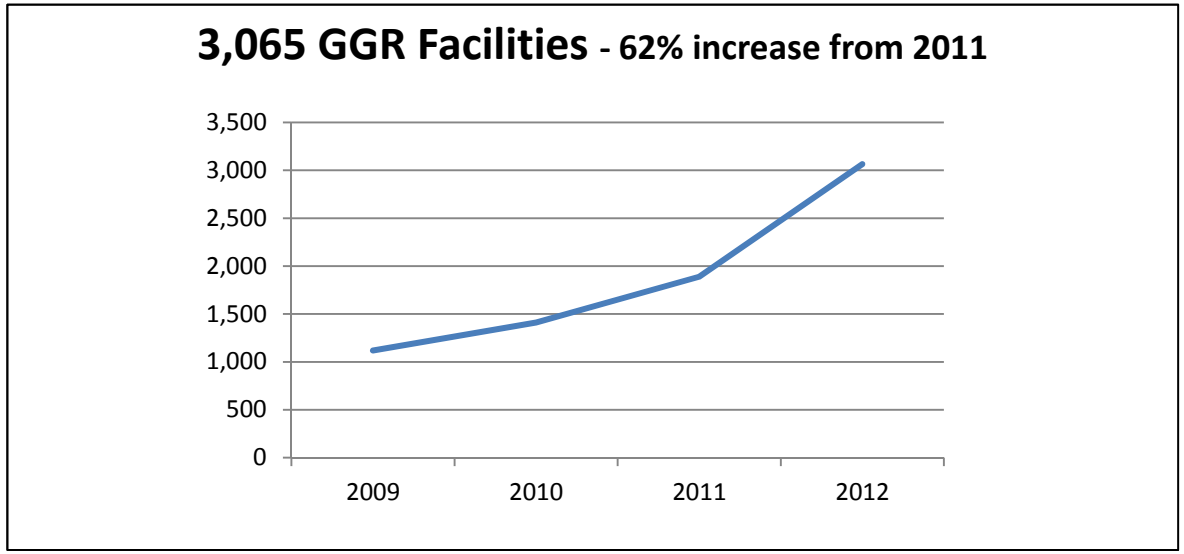
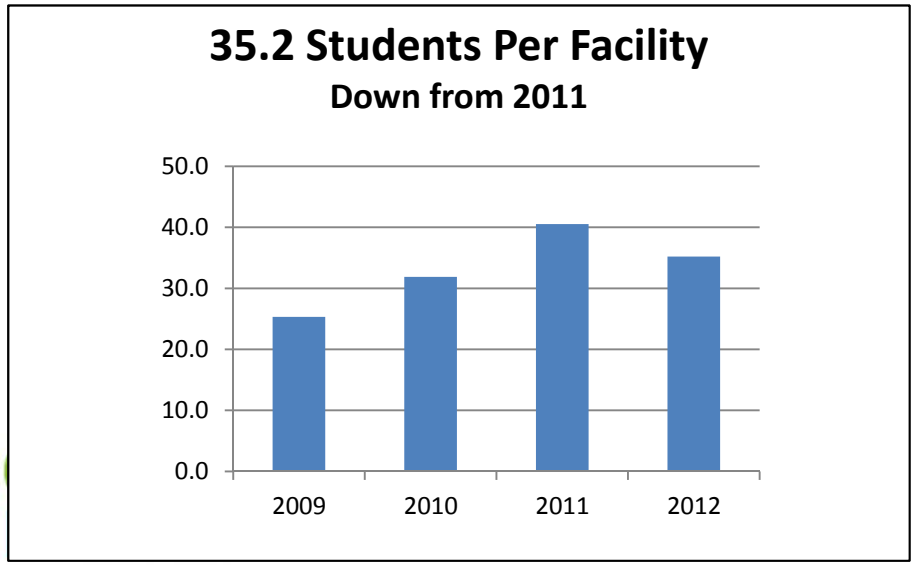
GET GOLF READY | 2012 Annual Report

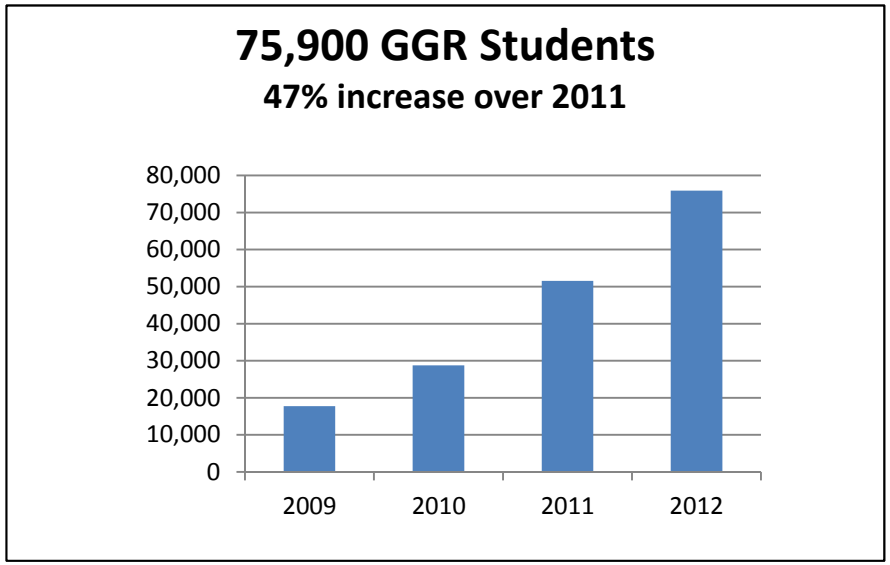
GOLF 20/20 VISION FOR THE FUTURE

PGA

2012: Growth in Facility Execution





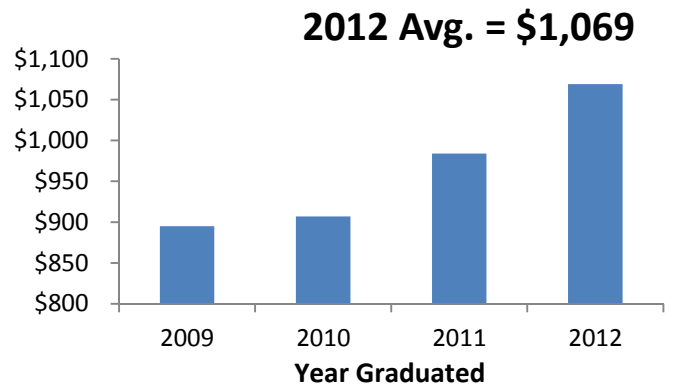


Participants Engagement

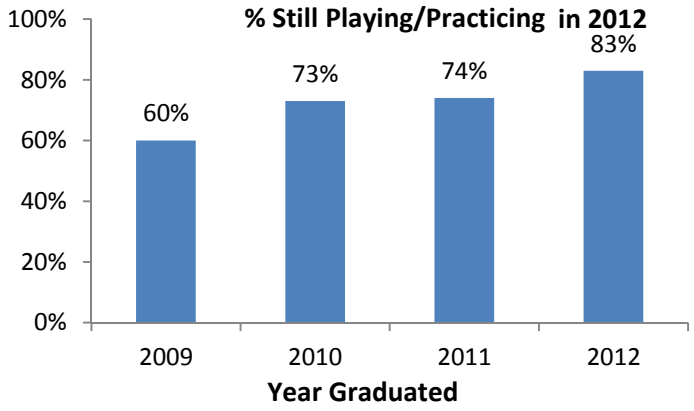
PARTICIPANT PROFILE

- 61% female
- 20% minority
- 42% never played before
- 96% say GGR met or exceeded expectations

PARTICIPANT SPENDING IN FIRST YEAR



RETENTION



Students Reported Spend on Golf

Projections Based on 35 Students

GGR Students	35
Retained Students (83%)	29
Average Spend on Golf*	$1,069
Total Spent On Golf	$31,000

Where are they spending?
Where are they playing?
Where are they practicing?

*GGR Student Survey did not capture data on where they spend on golf

GET GOLF READY

Driven by Promotions

- Supported through a fully integrated PSA campaign
  - National TV – 444 :30 units
  - Local TV (9 markets) - 1,240 :30 units
  - Print – 50 insertions
  - Radio – 1,575 :30 spots
  - Digital – Turner, Yahoo, Database

NBC Sports
GOLF CHANNEL
CBS
TURNER SPORTS
A TIME WARNER COMPANY

- National PR efforts generated 1,555 media placements valued at more than $209mm
  - Noted placements include GolfWeek.com, The Dallas Morning News, and HLN-TV

Breaking Through the "Grass" Ceiling: Learn How with "Get Golf Ready" program at TPC Southwind

ANNA COX

Aug 29, 2012 - 09:34 AM

Last week's announcement of Condoleezza Rice, former Secretary of State, and Darla Moore, South Carolina financier, as the first female members of Augusta National Golf Club, home of the Masters, did more than just recognize two talented golfers; it kept the momentum going for female athletes across the board.

Summer 2012 put a large spotlight on female athletes with tennis, track, beach volleyball, swimming, and gymnastics winning Olympic gold medals for the United States, and the announcement of female inclusion into the Augusta National "boys club" has only piqued the interest and participation of females in athletics, specifically golf.

Michaelyn Bradford, assistant golf pro at TPC Southwind

If you're inspired to pick up a club and give it a try, TPC Southwind is offering an opportunity for Mid-South women to "Get Golf Ready" beginning September 6th. For more information visit golfgetgolfreadymidsouth.com or call 748-0330 to inquire about non-membership lessons.

- Unique visitors to GetGolfReady.com up significantly over prior years
  - 136% lift over 2011, and 294% over 2010

GET GOLF READY

Industry Return on Investment (ROI)

	2012*	Cumulative Spending (Among participants who completed GGR and were retained)			
		2009	2010	2011	2012
Total Golfer Spend	$52.6 M	$8.2 M	$27.9 M	$85.2 M	$201.4 M
Golf	$27.0 M	$3.8 M	$15.8 M	$47.5 M	$114.4 M
Food/Beverage	$4.4 M	$0.8 M	$3.1 M	$10.9 M	$22.3 M
Equipment/Apparel	$21.2 M	$3.6 M	$9.0 M	$26.8 M	$64.7 M
GGR Investment	$900,000	$750,000	$1.4 M	$2.0 M	$2.9 M
Total GGR ROI	$58 : $1	$11 : $1	$20 : $1	$43 : $1	$70 : $1

NOTE(S):
* Among those who completed Get Golf Ready in 2012.
Cumulative spending (2009-2012) includes spending among legacy participants (*i.e.,* those who completed Get Golf Ready in prior years)

GET GOLF READY | Key Findings

GOLF 20/20 VISION FOR THE FUTURE

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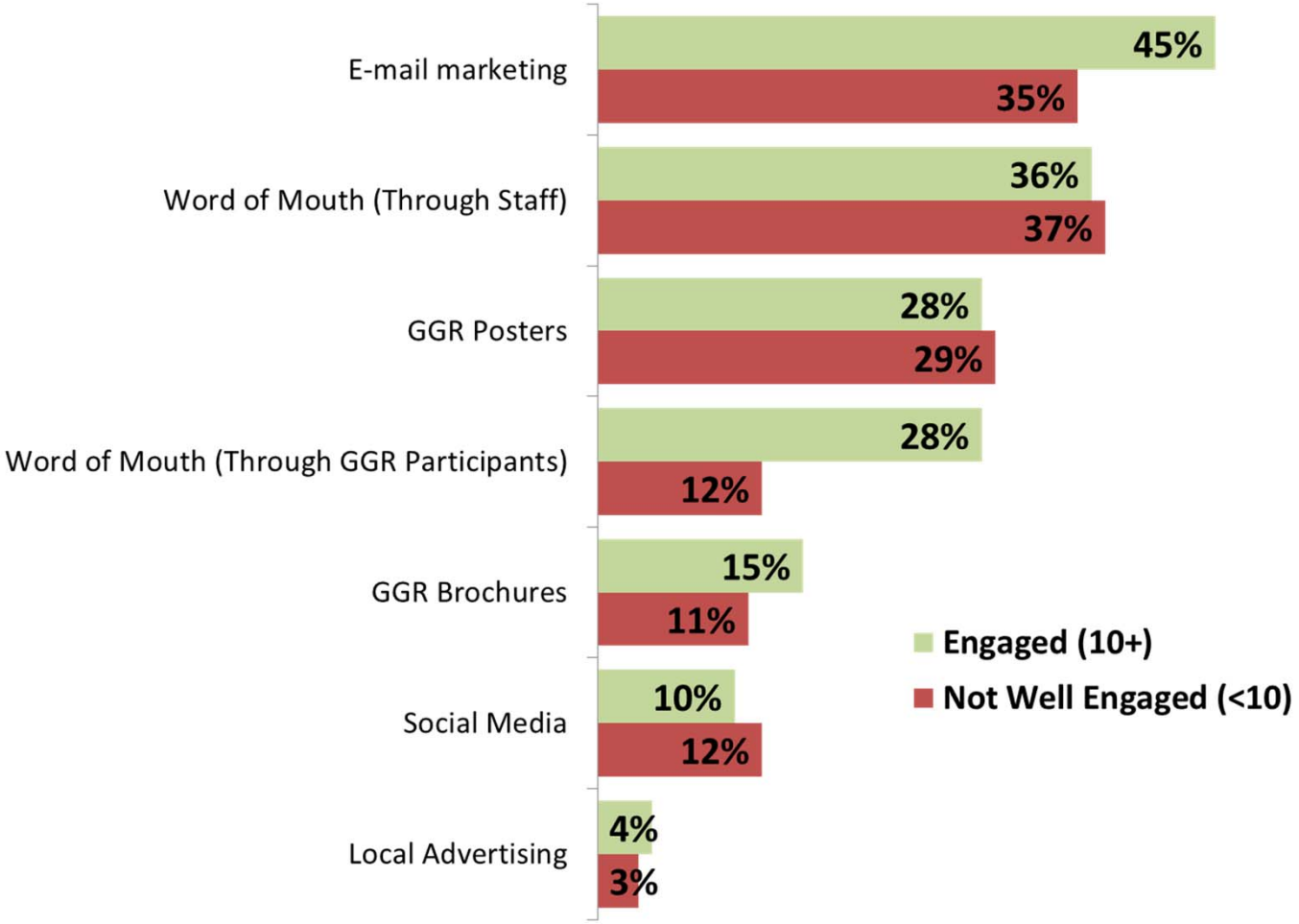
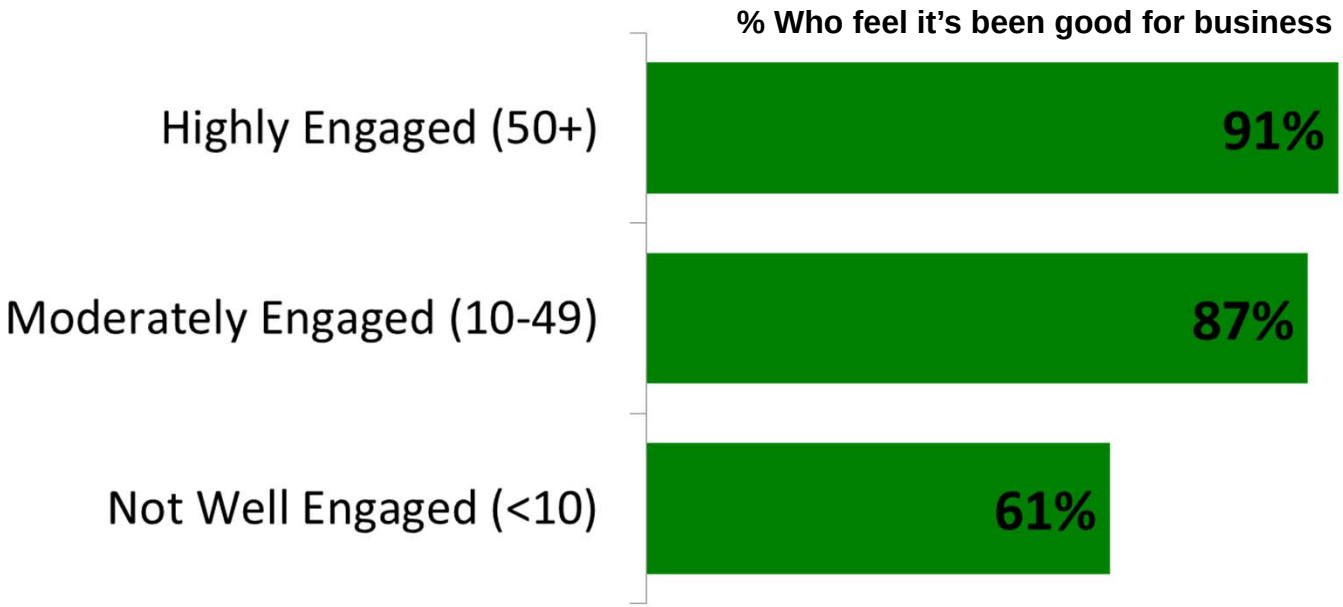
Facilities Report Effective GGR Marketing Efforts



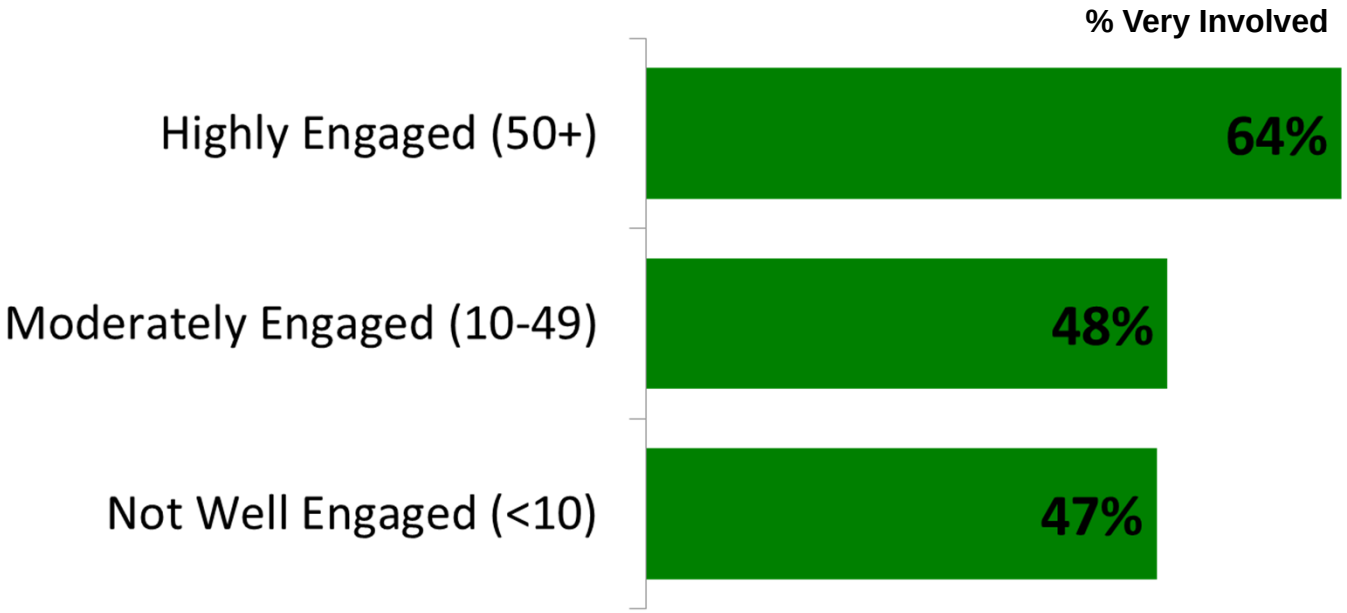
Q. What marketing materials/efforts were MOST EFFECTIVE in promoting GGR?

Facilities Report GGR Good for Business



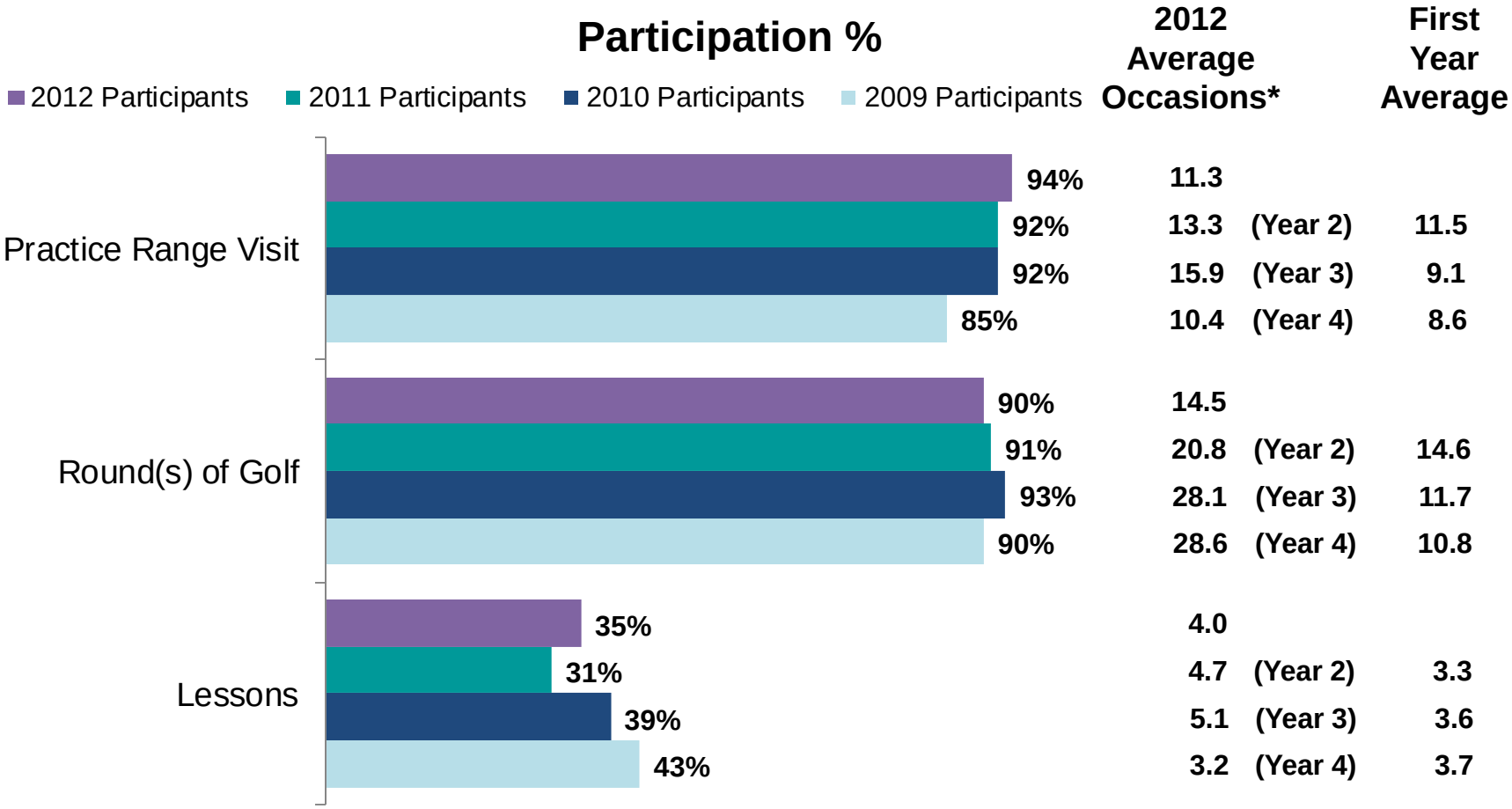
Q. Generally, would you say Get Golf Ready has been good for business at your facility?

Owner/Employer Involvement



Q. How involved would you say your owner/employer is regarding your facility's new player development initiatives – from providing support to helping ensure the success of your program(s)

Retained Students Frequency of Play & Practice in 2012



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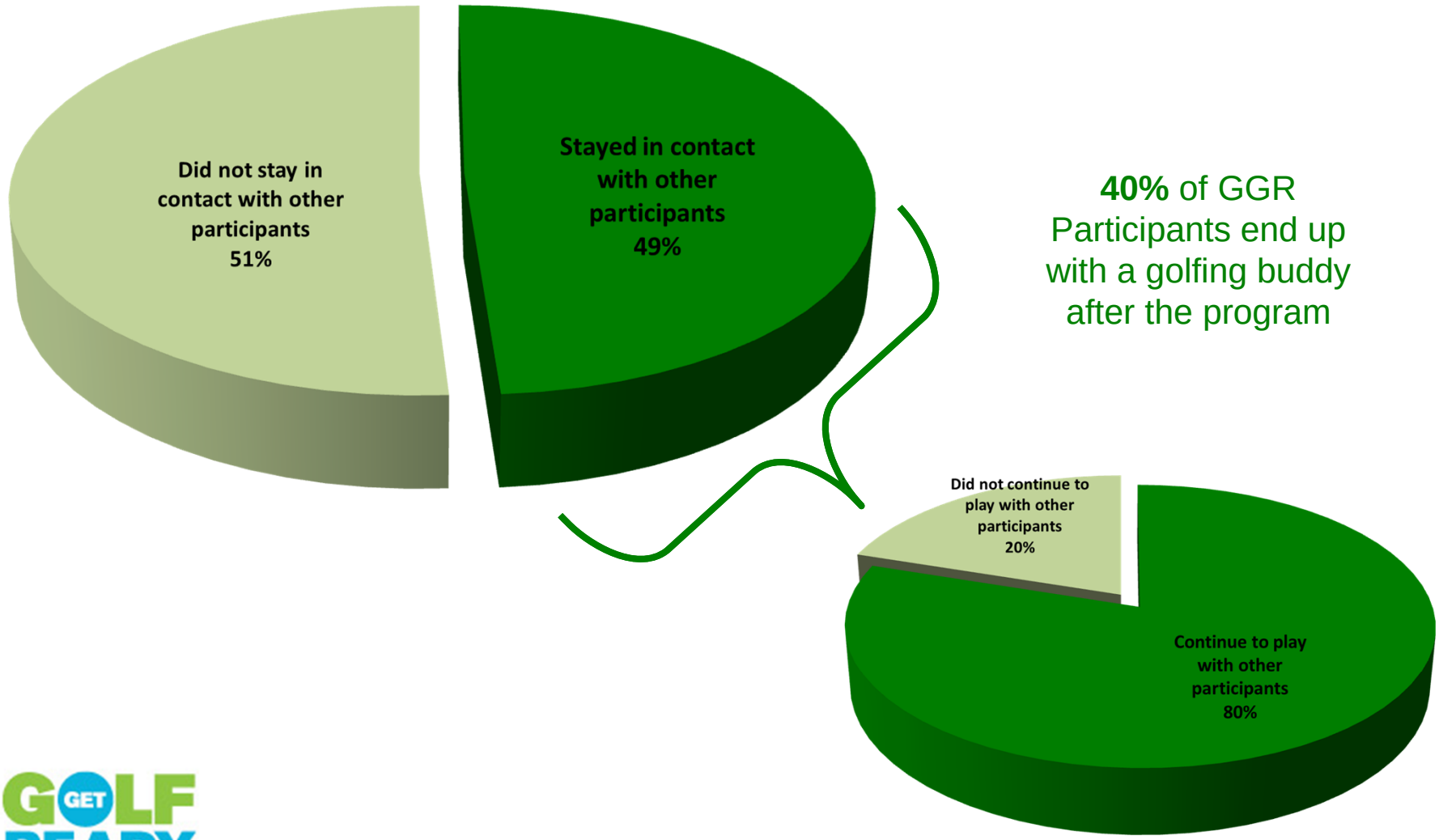
* Average occasions among those engaged in activity.

GGR Creates Golfing Buddies



40% of GGR Participants end up with a golfing buddy after the program

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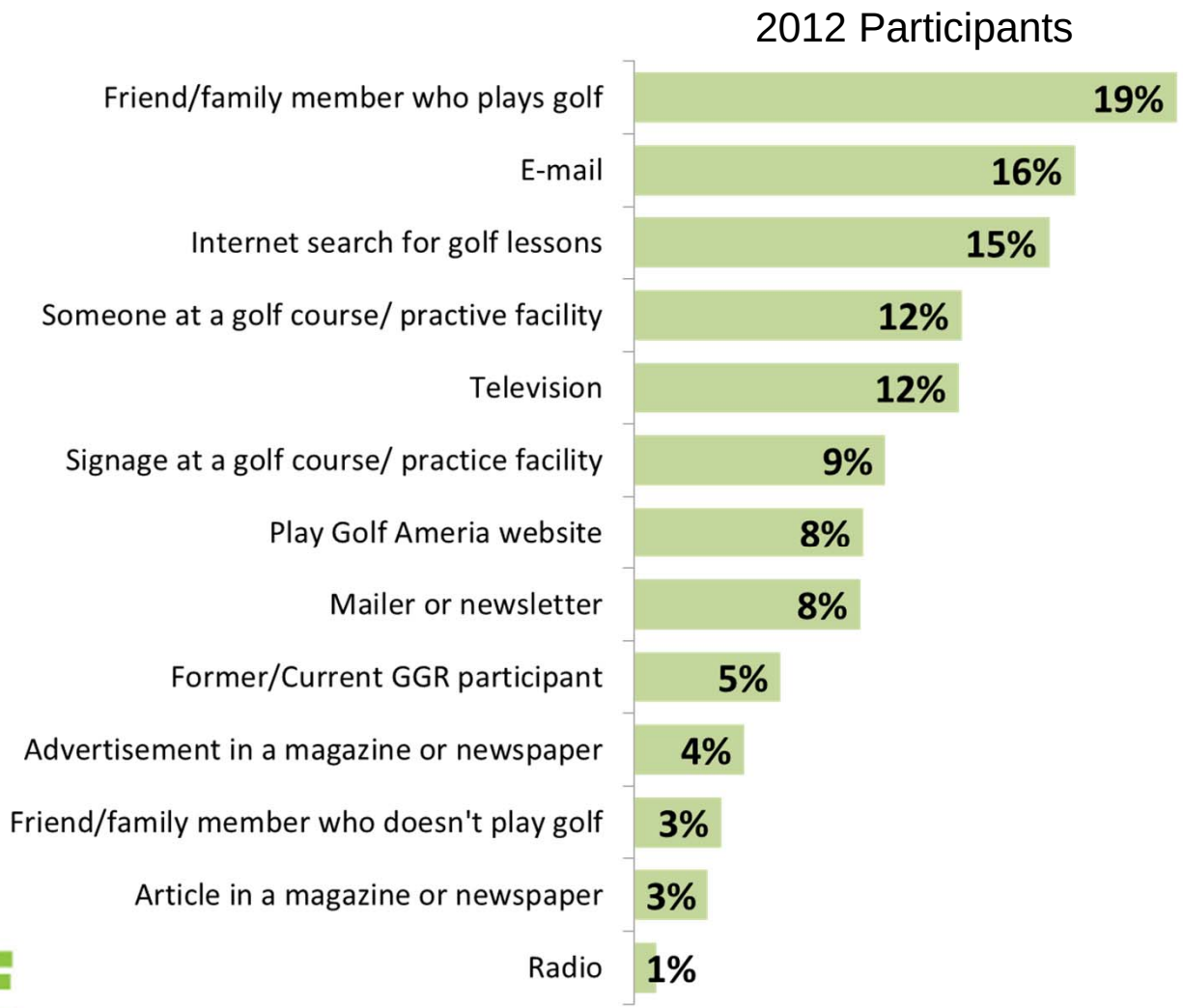
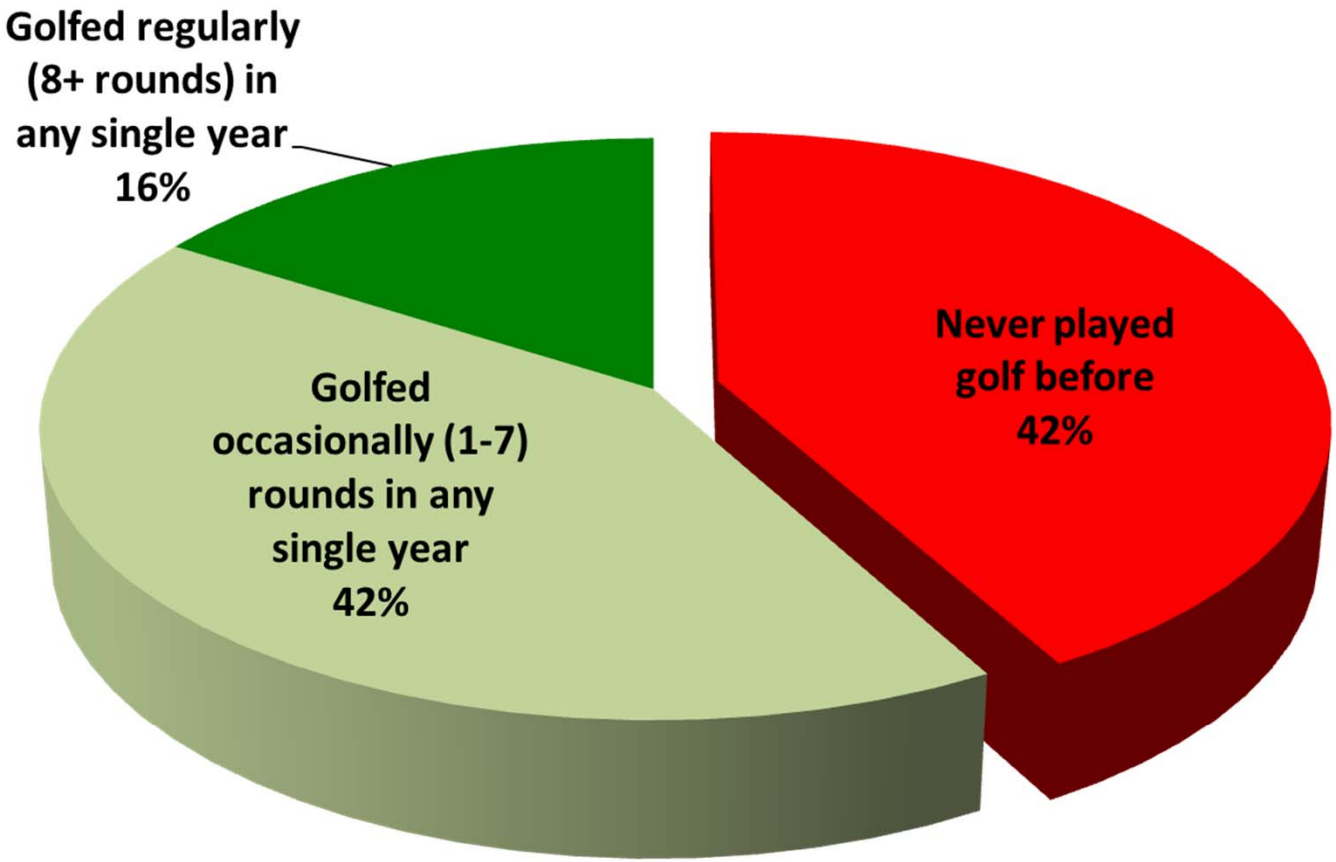
Student Source of GGR Awareness



Prior Golf Experience (2012)



Never Played:
2009 – 44%
2010 – 42%
2011 – 42%

Student Suggested Changes/ Improvements

- Add more on-course/playing time (top mention)
- More group lessons/follow-up group lessons - many don't feel ready to play on their own yet or ready to invest in private lessons.
- Additional on-course instruction - since they don't feel ready to go out on the course on their own (or with other beginners).
- Foster more post-lesson interaction among participants - organize groups/golfing buddies or share contact info – with attention to skill level
- Discounts for the range and course so they can practice during and after the GGR program.
- Offer hand-outs/take-away material of the things covered in each lesson or a video of the lesson.
- Split the class/smaller classes according to skill level (beginners versus those that are getting back into the game).

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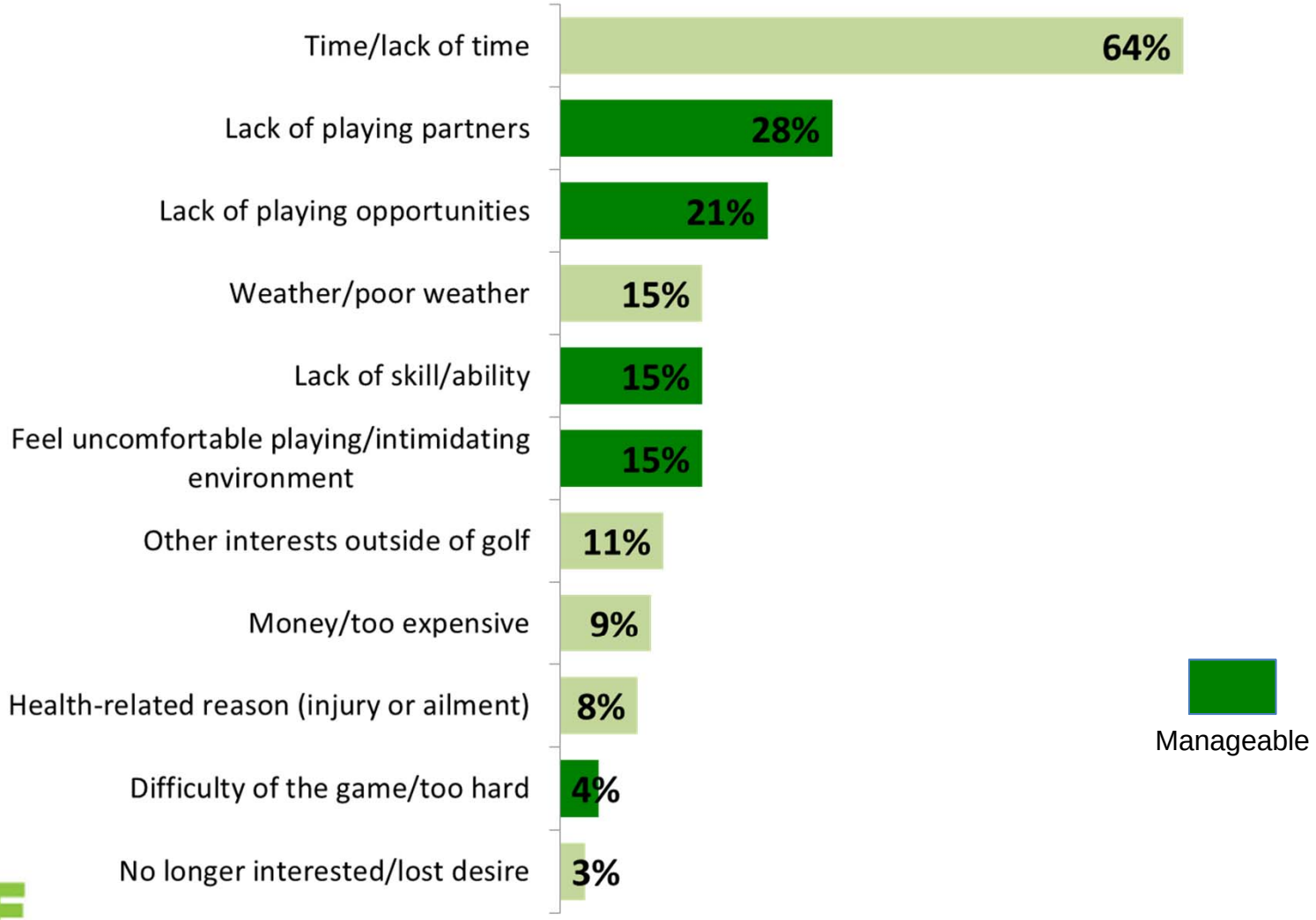
Q. What changes would you make to improve the program?

GGR Facility Follow-up – *most mentioned*

- E-mail contact
- Newsletter/Flyer distribution
- Offer incentives, discounts and special offers
- Offering additional playing opportunities (beginner leagues, gatherings, tournaments)
- Personal contact, interaction, or encouragement from instructors *(i.e., phone calls, interaction when seen at the course)*
- Lesson hand-outs/ tips or written instructions
- Offering additional lessons

Q. What kinds of things has the facility done to stay in touch with you, that you really appreciate?

Reasons for Not Continuing to Play



Q. What is the main reason(s) that you haven't continued to play golf? *(Multi-response)*

GET GOLF READY | Industry Support

GOLF 20/20 VISION FOR THE FUTURE

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Get Golf Ready Supporters

3balls.com
Adams Golf
American Golf Corporation
American Society of Golf Course Architects
Anonymous
Billy Casper Golf
Century Golf Partners
Chicago District Golf Association
Club Car Inc.
Club Managers Association of America
ClubCorp
Connecticut State Golf Association, Inc.
Dallas Golf
EAGLE Golf
Eaton Coro., Golf Pride Grips
EWGA
E-Z-GO
Golf Association of Philadelphia
Golf Course Builders Assoc. of America
Golf Course Specialists
Golf Course Superintendents Assoc ,of Amer.
Golf Datatech, LLC
Golf Digest (Conde Nast)
Golf Property Analysts (Hirsh Valuation Group, Inc.)
Golfsmith Golf & Tennis
GolfTEC Enterprises, LLC
Hampton Golf, Inc.
Harrell's Fertilizer
Honours Golf
Hunter Industries
Jacobsen, A Textron Company
John Deere Golf
Kemper Sports
Landscapes Unlimited (Kubly Family Foundation)
LPGA
Maryland State Golf Assoc.
Massachusetts Golf Association
Metropolitan GCSA
Metropolitan Golf Association
National Club Association
National Golf Course Owners Association
National Golf Foundation

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Get Golf Ready Supporters

New Hampshire Golf Association
Northern California Golf Association
Oregon Golf Association
Par Aide Products Co.
Pennsylvania Golf Association
PGA of America
PGA TOUR
PGA TOUR Superstore
Pinehurst Resort
PING
Rain Bird Corp.
Sequoia Golf, LLC
SI Golf Group
Syngenta

TaylorMade-Adidas Golf
Texas Golf Association
The Golf Channel, Inc.
Toledo District Golf Association
Toro Company
Trojan Battery
Troon Golf, Inc.
True Temper Sports, Inc.
United States Golf Association
Wilson Golf
Winn Incorporated
Women's Metropolitan Golf Association

Mr. Jerry Tarde
Mr. Jim Singerling
Mr. and Mrs. Joe L. Barrow, Jr.
Mr. Joe Steranka
Mr. Kevin Holleran
Mr. Leigh Bader
Mr. Mark Steinberg (Excel Sports Management, LLC)
Mr. Mike Hughes
Mr. Peter Bevacqua
Mr. Richard Raskopf
Mr. Stephen F. Mona
Mr. Ty Votaw
Ms. Cathy Harbin

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