



## Content Overview

### State of the Industry

A staple at every Symposium, NGF will share its independent perspective and data on the vital signs of the golf business. We'll look at trends that are affecting the business, as well as the overall dynamics of the market. This session will address participation rates, interest in playing among non-golfers and when a new equilibrium between demand (rounds played) and supply (golf course inventory) might be reached.

### Executive Sentiment

Based on feedback from attendees at previous meetings, this year's "SOI" will include a session on executive sentiment. In the weeks prior to the Symposium, NGF conducted dozens of interviews with golf executives to ask for their outlook on the game and business. Attendees will be briefed on what NGF learned, and will have the opportunity to hear firsthand from Callaway's Chip Brewer, Peter Hill from Billy Casper Golf, PGA TOUR Superstore's Dick Sullivan and Bill Brown from The TORO Company who will take the stage to share their views on the business and take questions from the audience.

### The Affluent Market – Trends That May Impact Golf's Heaviest Spenders

NGF recently noticed a change in the golf behavior of the \$150K+ income cohort. To shed some light on this market, Chandler Mount from YouGov will deliver a thought-provoking presentation on the affluent Americans that golf and other industries rely upon for a meaningful component of revenues. YouGov is a leader domestically and internationally in studying the trends in spending, recreation and habits of wealthy families.

### The Intersection of Junior Golf & the Centennial Generation

Last year in Carlsbad, the Symposium featured a comprehensive study and segmentation of the Millennial generation and their relationship with golf. This year the NGF begins a journey to better understand the next generation of golfers: the Centennials. Sometimes referred to as Gen-Z, this is the generation of juniors born after 1997. Symposium attendees will hear from Chicago-based Erik Medina, Vice President of The Futures Company and the leader of their TRU Youth MONITOR Study which is relied upon by more than 100 of the world's leading youth-oriented brands.

### Winning the Numbers Game - Retaining and Engaging New Golfers

The unique "closed door" environment of the Symposium provides an opportunity to candidly discuss our business's greatest challenges and opportunities. NGF research shows that golf remains attractive to a staggering number of Americans and our industry has a significant upside if we can only accelerate changes to the way we invite and on-board willing beginners and increase our ability to convert them into passionate golfers. This session will take a close look at golfer engagement and retention, and suggest what we can and should do about improving our results.