

LOOKING TO THE FUTURE
OF THE GOLF BUSINESS



HOW WILL GOLF DEFINE ITS FUTURE?



WHEN WILL YOU "HIRE" BB-8?

Speaks multiple languages, retains enormous volumes of information, always on time.



7 EARTHSHAKING IMPACTS FOR GOLF

- 1. Fear
- 2. Women
- 3. Labor / Jobs
- 4. Environmentalism
- 5. 99 Lives
- 6. Roots
- 7. Global Economy



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FEAR

HOW WILL ONE KEEP ONE'S FAMILY SAFE AND SECURE?



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FEAR CONNECTS AMERICANS



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74% OF AMERICANS FEAR "CATASTROPHIC TERRORIST ATTACK" BY ISLAMIC MILITANTS

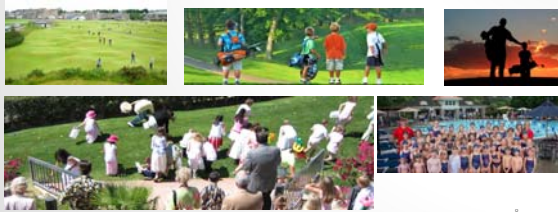
PAUL BEDARD
JANUARY 2015
WASHINGTON EXAMINER,

Americans seek safe havens or "cocoon" for their loved ones.



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SAFE HAVENS AND COCOONS



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"The hand that rocks the cradle rules the world."

William Ross Wallace (1865)

WOMEN



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WOMEN CHANGING EVERYTHING

- Future Growth for Golf and Businesses Touching Golf
- Re-orienting Golf and How It is Played
- Family-Focused Programs and Events
- Self-Fulfillment and Actualization



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"40% of workers will be replaced by robots."
 Alan Murray, Fortune, magazine editor

LABOR AND LABOR POLICY



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WILLIAM FREY, DEMOGRAPHER



- Specializes in issues involving urban populations, migration, immigration, race, aging, political demographics, and the U.S. Census.
- Research Professor, Population Studies Center, Institute for Social Research, University of Michigan

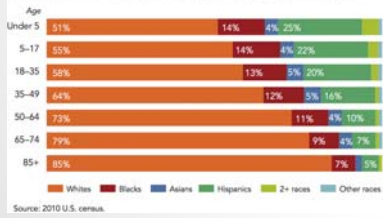


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AMERICA IS GRAYING AND BROWNING

WILLIAM FREY, DEMOGRAPHER, BROOKING INSTITUTION

FIGURE 2.4
Cultural Generation Gap: Population Composition, by Age and Race, 2010

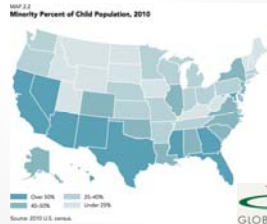


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AMERICA IS GRAYING AND BROWNING

WILLIAM FREY, DEMOGRAPHER, BROOKING INSTITUTION

By 2027 minorities will outnumber whites nationally by those under age 30 and ditto for those under 40 by 2033.



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THE SUNBELT AND INTERIOR WEST CONTAIN MANY OF THE 145 FASTEST GROWING NEW HISPANIC DESTINATIONS.

William Frey
Demographer,
Brookings Institution
Source: 2010 US Census

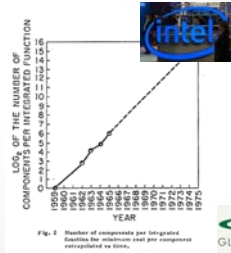


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MOORE'S LAW

GORDON E. MOORE
CO-FOUNDER OF INTEL AND FAIRCHILD SEMICONDUCTOR

- Analysis that technological advancement creates a doubling effect every 18 to 24 months.
- Moore's law describes a driving force of technological and social change, productivity and economic growth.



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Applying Moore's Law indicates accelerated changes golf increases its technical adaption.



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"DO MORE WITH LESS"



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"The holy land is everywhere."
Hehaka Sapa (Black Elk - Lakota Sioux)

ENVIRONMENTALISM



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WOMEN WANT TO KNOW THAT YOUR COURSE IS SAFE AND CARED-FOR



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WATER AND WATER-TAKING

Golf's use of water will define its future.



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"Too fast a pace, too little time, causes societal schizophrenia, and forces us to assume multiple roles." Faith Popcorn 2016

99 LIVES



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**FAITH POPCORN'S
BRAINRESERVE**



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Golf is a peaceful refuge for busy people...to socialize and regenerate.



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CLUBS CAN CENTRALIZE SOLUTIONS



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HOPE,
ESCAPE,
SERENITY,
FULFILLMENT,
ENGAGEMENT.



Golf's future is a soulful
balance for a rapidly
evolving world.



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ROOTS



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ROOTS ANCHOR US TO OUR VALUES

- *Spiritual*
- *Emotional*
- *National*
- *Cultural*



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VALUES LEARNED FROM GOLF



"Your beliefs become your thoughts,
 Your thoughts become your words,
 Your words become your actions,
 Your actions become your habits,
 Your habits become your values,
 Your values become your destiny."

Mahatma Gandhi



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VALUES LEARNED FROM GOLF



- Accountability
- Self-reliance
- Honesty
- Socialization

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GLOBAL ECONOMY



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GLOBAL ECONOMIC IMPACTS ON GOLF

- Sovereign Debt
- Inter-dependent Economies
- Globalized Cross-Collateralization
- Economic Elasticity



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GLOBAL SUSTAINABLE NATIONAL DEBT TO GDP RATIO = MODERATE



Countries Scaled to the Unsustainability of their Debt
Debt-to-GDP Ratio (%)

Legend: GDP Growth Rate

- Red: <math>< -0.5\%</math>
- Orange: $0.0\% - 0.5\%$
- Yellow: $0.5\% - 1.0\%$
- Green: > 1.0%

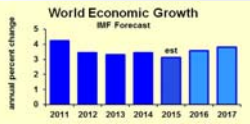
howmuch™

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WORLDWIDE 2016 GDP GROWTH FORECAST REGION = MODEST GROWTH



VOLATILITY IN GLOBAL ECONOMY



Golf will weather change with key golf-economy influences.



WHAT DOES ALL THIS MEAN FOR GOLF?

1. Greater pressure on growth and retention of participants.
2. Increased attrition of supply.
3. Changing labor structures and practices.
4. Increased volatility for supply chain.
5. Unabated economic pressure for facility managers.
6. Expanded opportunity for worldwide growth of golf.
7. Emerging competitive influences.



DISCUSSION | QUESTIONS



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