

# PGA TOUR

## Integrated Marketing Plan



**Prepared for the National Sports Forum  
2018 Case Cup Competition**



## #PGATOUR!

### INTRODUCTION

Bryan Ahearn couldn't believe his good luck. His employer, ParFour Marketing, has relied on him to deliver insightful and successful marketing strategies for key clients as the "Voice of the Millennial." As the largest living generation, many brands and media companies knew that millennials, and the following generation, Gen Z, were critical to their success in the future. Now, Bryan was given an assignment to develop a media and marketing plan for the PGA TOUR for the upcoming season that would engage Millennials with the organization's social media, viewership, and events.

Bryan had been a golfer since high school, and played on his college team. His vacations and business trips often included finding a new golf course wherever he traveled. However, he knew mere enthusiasm for the sport would not satisfy the PGA TOUR. He knew that success for this client would center on delivering results on five key performance indicators (KPI's):

- Increase attendance of 18-34-year-old fans on-site (at tournaments)
  - The amount of time spent on-site
  - The amount of money spent on-site
- Convert casual fans who watch majors and other sports into PGA TOUR tournament attendees
- Provide excitement for fans looking for social and memorable experiences
- Increase the number of Millennials who watch PGA TOUR events on various social media platforms
- Increase the number of Millennial followers on PGA TOUR social media

### PGA TOUR

Bryan first reviewed the scope of his client. He learned that the PGA TOUR is headquartered in Ponte Vedra, FL, USA, and is the main organizer of the professional golf tournaments played primarily by male golfers in the United States and North America. Bryan knows the success of the organization depends on meeting PGA TOUR objectives: entertaining its fans; delivering substantial value to its partners; creating outlets for volunteers to give back; generating significant community charitable and economic impact in which it plays; and providing financial opportunities for TOUR players.

Bryan also discovered while golf professionals only began touring in the last century, the PGA TOUR's current tours came about in 1968. That date saw the creation of the PGA TOUR "Tournament Players Division", with a 10-member Tournament Policy Board, consisting of four tour players, three PGA of America executives, and three outside members.<sup>i</sup> The organization adopted 'PGA TOUR' as its name in 1975. It has run men's professional golf tournaments, including more than 100 events such as The Players Championship, the FedExCup, and the biennial Presidents Cup, under PGA TOUR.<sup>ii</sup>

PGA TOUR conducts business operations across six distinct tours:

- The flagship PGA TOUR
- PGA TOUR Champions for professional golfers age 50 and older
- Web.com tournament for players - developing to play in the PGA TOUR
- Professional Tours in Canada, Latin America, and China

The PGA TOUR season starts in October of the previous calendar year. The 2017-2018 PGA TOUR season began on October 5, 2017. The 2017-18 schedule includes 49 national and international events.

*Reference Appendix A “PGA TOUR Schedule 2017-2018” on pages 11-14 or on your team’s USB drive.*

## **PGA TOUR MEDIA AND CUSTOMER TOUCH POINTS**

Bryan knows that Millennials get their entertainment from a variety of media sources and event participation. He was pleased to learn usefully, the PGA TOUR goes beyond a professional sports organization and operates as a fully integrated media and entertainment company. It houses a full television production house as well as a full set of digital assets to deliver programming across all potential media platforms – the PGA TOUR desires to meet fans where they want to consume content.

Bryan then sought to find how the PGA TOUR currently utilized their media platforms to increase fan engagement. He learned fans can engage with PGA TOUR and the sport of golf in a variety of ways: digital and social media, viewership through television broadcasts, and attendance at tournaments and related events.

The TOUR attempts to meet the needs of the fans through, but not limited to:

- On-site experience
- TV Broadcast
- Digital Content and Engagement
- Fantasy Marketing Partner activations
- SKRATCH TV

### Digital and Social Media

On PGATOUR.com, Bryan saw the web page has a range of potential areas of fan engagement. The site includes the new articles, leaderboard, updated schedule, player information, FedExCup information, statistics, fantasy information, and trending golf news.<sup>iii</sup> PGATOUR.com and YouTube also foster player interest with numerous videos of interviews, tournament plays, and lifestyle activities such as charity events. He saw the site also has a list of upcoming events that includes ticketing options: opportunities to schedule special hospitality events; volunteer opportunities; charitable affiliations; and more. In addition, the newly redesigned player pages feature player achievements, live scorecards, social feeds, and deeper statistics. Fans can also find quick links to players’ social media accounts.

In his research, Bryan also learned about SkcratchTV.com, a digital media company focused on golf, and reaches over 500 million fans across all its platforms. It provides a variety of original programming and social, shareable content that prides itself as un-stuffy golf. Its taglines include “Golf. Untucked.” and

“We Make Golf Fun.” Often irreverent but consistently positive in messaging, SkratTV media taps into golf as a lifestyle, and attracts a younger age group than the PGA TOUR website.

Knowing the importance of having a presence on social media, Bryan was pleased to learn the PGA TOUR is connected to a range of social media channels including Facebook, Twitter, Instagram, YouTube, and Tumblr, with the youngest audience on Snapchat. In addition to increasing the PGA TOUR owned and operated social media channels, the PGA TOUR also focuses on increasing the players’ social media presence, which can increase awareness of the player, the sport, and the PGA TOUR.

Within social media, like other sports leagues, the TOUR’s focus has been on content. The PGA TOUR has prioritized the development of content that attracts fans/potential fans using targeted posts, often sponsored, on social media.

Bryan saw as of mid-2017, the TOUR has also utilized the emergence of podcasts for PGA TOUR product/brand awareness, specifically to target the new and improved PGA TOUR Mobile app, player pages on pgatour.com, PGA TOUR Live, Fantasy, and Social. The TOUR has placed 30-45 second podcast buys that rotate on a quarterly basis.

In addition to the above initiatives, the PGA TOUR also invests in Google Ads: SEM and Display buys. SEM is used to promote the PGA TOUR Leaderboard during the tournament window. This allows the fan to find the most up-to-date leaderboard by using identified keywords. The TOUR uses Google display to promote tournament awareness or other PGA TOUR special initiatives. The TOUR has the capability to suppress the “typical” golf fan, this way it can encourage new visitors to the website rather than the current fans.

### Broadcast Viewing

The Golf Channel is the exclusive cable partner of the TOUR. The golf channel provides pre-game coverage for the following:

- The major events such as the Master’s Tournament and U.S. Open
- World golf events that are co-sanctioned by the International Federation of PGA TOURS
- The Players’ Championship, which attracts the top golfers of the world
- Top playoff events, often sponsored by major corporations
- “Regular” tournaments that have a variety of events, many with enduring popularity such as the Arnold Palmer Invitational

In addition, CBS Sports broadcasts PGA TOUR events approximately 20 events per season. NBC broadcasts approximately 10 events per season.

Fans can also have exclusive coverage Thursday and Friday mornings on PGA TOUR LIVE. PGA TOUR LIVE is the only place to view live morning coverage of early rounds. PGATL is offered after over 30 PGA TOUR events. The PGA TOUR LIVE subscription is currently \$39.99 annually or \$5.99/month. PGATL is available on iOS, Android, and desktop.

## Tournament Attendance and the PGA TOUR App

Bryan knows the ultimate goal is to get Millennials to the PGA TOUR tournaments. Of course, there is the appeal of the tournament itself, but PGA TOUR tournaments continue to focus on a 360-degree view of total fan experience. This has resulted in tournament attendance that has returned to what it was 10 years ago, bouncing back from years affected by the recession. Many tournaments now include a variety of public viewing sites, multiple food options and relaxation, shopping, and related opportunities for fan engagement.

In recent years, the PGA TOUR has focused more on the fan journey, from the beginning of the consumer's awareness of PGA TOUR events. Ideally, the TOUR would track the consumer from their awareness phase all the way to the Superfan phase, and wherever they stop. The PGA TOUR wants to get more people on-site to experience the tournament for themselves. It's not just golf, it's entertainment!

The TOUR wanted to make it easy for fans to engage with the tournament, and moved with the times by relaxing the rules allowing portable devices and social media at these events. Following the number one rule of marketing ("Make it as easy as possible,") and leveraging forwarding-looking technology, it launched an app that became the nexus of the golf course and other amenities.<sup>iv</sup> Fans can now opt into breaking news, get player alerts, follow play, receive updates via push notification, and access customized on-site landing pages, making the tournament simpler and more manageable for attendees.

A priority of the PGA TOUR is to use the app for direct communications with tournament fans, triggered by location. At the PLAYERS Championship in 2017, the app served fans with many onsite fan journey features including:

- In-App ticketing (purchase and management)
- Wallet (point-of-purchase and in-app purchases)
- Mobile ordering (merchandise, food, and beverage)
- Transportation (Uber and Lyft)
- Live map integration
  - o Track Players, groups, and hole data
- Find-a-Friend (Facebook-related)
- Waypoint, which integrates different fan venues
- Location-based app messaging
- Special offers, information, and alerts

## On-Site Experience Examples

In the 2018-2019 PGA TOUR season, the TOUR would like to enhance the on-site experience and activation. Knowing this, Bryan researched examples of on-site events and activities at selected tournaments:

### THE PLAYERS Championship

- Utilized students from Ponte Vedra High School as Social Media Caddies during tournament week to capture images/quotes and assist tournament staff with social media content
- Established upgraded food areas across the course with local, recognized restaurants and food trucks

- Hosted social influencers and celebrities at the tournament to take photos and share with their followers to attend the tournament
- Collaborated with local universities and charities to have students volunteer as greeters and ticket scanners
- Connected with NHL to bring the Stanley Cup to the tournament
- Collaborated with Nickelodeon to enhance kids' area and family-friendly activities
- Hosted country music concert during practice rounds with singer-songwriter Sam Hunt
- Held ice cream social for children on-site during practice rounds

#### The Northern Trust

- Collaborated with Grey Goose to host an event for social influencers and media on a rooftop in New York City in advance of the tournament
- Held a workout class with Brooks Koepka and Michelob ULTRA on-site during tournament week
- Collaborated with SoulCycle, a premier indoor cycling and lifestyle brand, to hold a pop-up charity ride during tournament week with a PGA TOUR player
- Partnered with TRENDYGOLF to station concierge kiosks around the course with models/representatives from a variety of fashion houses including Ralph Lauren, LaCoste, J. Lindberg, Kjus and Dunning
- Hosted social influencers at the tournament to take photos and share with their followers to attend the tournament
- Established an upgraded fan area with recognized restaurants and brands such as Kendra Scott, Yeti, Momofuku, Lobster Press, junior's cheesecake, and more

#### TOUR Champ

- Developed Jordan Spieth bobble heads to be handed out on-site to the first 1,000 fans each day Thursday – Sunday
- Hosted a concert during practice rounds with hip-hop music artist and Atlanta local, Ludacris
- Hosted social influencers at the tournament to take photos and share their followers to attend the tournament
- Established an upgraded fan area with recognized restaurants and brands
- Collaborated with Uber to promote ride sharing and a venue on-course.

Bryan is also aware of PGA TOUR's collaborators and marketing partners, who could potentially share the costs of these promotions.

*Reference Appendix B "PGA TOUR 2017-2018 Sponsors" on pages 15-22 on your USB drive.*

*The list of official sponsors/partners is also available at:*

*<https://www.pgatour.com/company/omps.html> (scroll to the bottom for partners link on website.)*

## PGA TOUR FANS

Bryan turned his attention to the PGA TOUR fan profile.

*See Appendix C “PGA TOUR Audience Reach & Demographics” on page 23*

*Also review <https://www.pgatour.com/advertise/audience.html>*

Bryan noticed PGA TOUR fans tend to be more affluent than fans of other sports; compared to fans of major league football, baseball, and basketball, they are more likely to have advanced degrees, household income of \$200K+, top management positions, and a net worth greater than \$1 million.<sup>v</sup>

He also noticed PGA TOUR fans also have greater representation within C-Suite positions. They are more likely to give to charities than fans of other sports. Fans enjoy the fact that the PGA TOUR has a very positive overall image, and enjoys a reputation for enhancing local communities and encouraging volunteerism.

Fans follow PGA TOUR content on a variety of media, with over 9.5 million on the PGATOUR.com Digital Platform and 7.42 million on TOUR social media. In 2015, PGATOUR.com averaged 38 million monthly visitors, of which 9.5 million were unique visitors. On average, fans spent 6 minutes visiting the site, or 6 minutes per fan x 38 million fans = 228 million minutes in total. Compared to desktop and mobile web, fans exceedingly use mobile apps to visit PGA TOUR and spend the most number of minutes on the site. In 2015, fans averaged 3.8 million app downloads, 26 million visits, and 5 million unique visits from mobile, tablet, and desktop platforms.

The breakdown of the average age by platform:

- Web – 55 mobile / 56 desktop
- App – 50
- Social – 30
- Live – 48

### PGA TOUR Social Media Audience

Of 4.79 million PGA TOUR social media (Facebook, Twitter, Instagram, YouTube) audience reported as of November 2017, Bryan was surprised to learn 64% are men, of which 92% are in 18-34 age group. Instagram is the most popular social media platform among PGA TOUR audience followed by Twitter and YouTube.

*See more detail in Appendix D “PGA TOUR Social Media Audience” on page 24 or your team’s USB drive.*

## MILLENNIALS

Bryan clearly understood the PGA TOUR’s desire to attract Millennials, defined as persons aged 18-34. This age cohort now numbers 75.4 million, and is expected to peak in 2036 at 81.1 million, with immigration adding to this group.<sup>vi</sup> This group surpasses— in numbers, not wealth - Baby Boomers, 74.9 million, aged 51-69, which had dominated marketers’ consciousness for generations. He also noted how



millennials are also more ethnically diverse, and have lower incomes than the average PGA TOUR fan. The Great Recession of the late 2000s and early 2010s has had a major economic impact on millennials. It caused historically high levels of unemployment among this age group and has led to speculation about the lasting economic and social damages among millennials. Although more millennials are making serious money as of late, their finances are still fragile and constrain extraneous expenses. According to the US Department of Labor Bureau of Labor Statistics (<https://www.bls.gov/>), the household income headed by millennials lagged those of other generations in 2016.<sup>vii</sup>

*See more detail in Appendix E “Income of Selected Age Groups” on page 25 or on your team’s USB drive.*

### Millennials and Sports

Millennials’ apparent shift of consumption in sports is feared as the root cause of declining ratings in live sports. They watch sports on their laptops and mobile phones. According to Nielsen data, the National Football League (NFL) ratings for millennials declined 9 percent during the 2016–2017 regular season. The ratings decline was attributed to an 8 percent drop in the number of games watched by millennials and a 6 percent decline in the number of minutes watched per game.<sup>viii</sup> Compared to GenXers, Millennials are less committed sports fans (38% vs. 45%) according to McKinsey’s 2017 survey. However, they follow certain sports and leagues, such as Major League Soccer and college sports, over other sports.<sup>ix</sup>

*See more detail in Appendix F “Fan Interest in Sports by Generation” on Page 26 or on your team’s USB drive.*

### Millennials and Golf

Bryan knows that Millennials are very different from previous generations in their golf participation interest level. Bryan sees this in how fewer of his friends of similar age are not as interested in “all-golf, all-the-time” as their parents are. Many are interested in participating in golf-related activities, but are not as keen on watching the sport. A 2015 report funded by the National Golf Foundation titled “#Golf and the Millennial Generation” noted that golf is:<sup>x</sup>

- Perceived as an “old man’s sport”
- A wealthy person’s sport, making it difficult to relate compared to other sports they’ve played in school
- Slower-moving pace is not as engaging to watch as other sports
- Expensive to participate in
- Difficult to play as a beginner

*See Appendix G “Golf Participation Rate by Income and Generation” on page 27 or on your team’s USB drive*

Despite Millennials’ less-than favorable view toward golf viewership, Bryan was shocked to learn they still make up 26% of all golfers who play 90 million rounds of golf annually and generate over \$5 billion of revenue for the industry. Although the size and impact of millennial players are profound, they yet fall short of the industry participation expectations compared to the previous generation (Gen Xers). There are several factors accountable for the discrepancy:<sup>x</sup>



1. The Millennials' demographic makeup is different. There are more non-Caucasian 18-34-year-old millennials today than 20 years ago. The non-Caucasian population plays less golf than Caucasians -- 7% vs. 12%, respectively, and could be another growth segment. Increasing diversity should be part of the effort to attract Millennials.
2. Today's Millennial generation is more financially burdened compared to the 18- 34-year-old generation of 20 years ago. Between mounting credit card and student loan debt, they have less discretionary income to spend on relatively expensive pastime like golf.
3. They are busier than ever. They are overwhelmed by many activities, functions, events, and choices compared to the previous generation. Millennial golfers are significantly more active than their non-golfing brethren. They are active in other sports and recreational activities beside golf. They are also busy professionals who spend extra hours at work at the expense of their free time.

Bryan senses golf needs a re-branding and re-positioning (pertaining to viewership/consumption) with Millennials, supported by messaging that made the sport more engaging to this group. Usefully, the recent FedExCup winners of the PGA TOUR are young and relatable. Justin Thomas (2017) is 24. Dustin Johnson (2016) is 33. Jordan Speith (2015) is 24. Patton Kizzire (31) and Rickey Fowler (28) are also young leaders with great social media presence.

Additionally, Bryan noticed golfers of his age were likely to spend time on [www.SkratchTV.com](http://www.SkratchTV.com) and/or listen to their favorite golf related podcasts; i.e. No Laying Up, Clubhouse with Shane Bacon, Golf Digest Podcast, Shack House, and Golf.com Podcast.

No doubt, there are a lot of people fighting for the millennial attention span when it comes to golf, but the PGA TOUR has one thing everyone doesn't – the PGA TOUR on-site experience! The question is, how can the PGA TOUR make the tournaments unforgettable and F.O.M.O. (Fear Of Missing Out) worthy?

### Millennials and Social Media

Bryan knows that Millennials are very different from previous generations in their media consumption. His friends are very active on many forms of social media. Even his non-golfing friends seem to enjoy some of the photos and re-tweets he shares from such golf-oriented sites as GolfStats.com and SkratchTV.com. Bryan reviewed the participation statistics on various social media platforms, with an eye on using this as the main communications platform to engage this group and bring them to PGA TOUR events.

*See Appendix H "Millennials' Engagement on Social Media" on page 28 or on your team's USB drive*

## **DELIVERABLE TO THE PGA TOUR:**

Bryan has been given a \$5 Million budget to develop an integrated marketing communications plan that is to be spread across the PGA TOUR events. PGA TOUR wants the plan to focus on attracting Millennials to their tournaments with a tour-wide execution. The plan should specifically target and attract Millennials to purchase PGA TOUR tournament tickets and related on-site experiences at PGA TOUR tournaments. The plan should encourage strategies that result in attracting first-time tournament attendees and repeat attendees to spend more time and money at PGA TOUR tournaments as well as converting viewers to attend PGA TOUR tournaments. Specific KPI's:

1. Increase attendance of 18-34 year old fans on-site (at tournaments)
  - a. The amount of time spent on-site
  - b. The amount of money spent on-site
2. Convert casual fans who watch majors and other sports into PGA TOUR tournament attendees
3. Provide excitement for fans looking for social and memorable entertainment experiences
4. Increase the number of Millennials who watch PGA TOUR events on various social media platforms
5. Increase the number of Millennial followers on PGA TOUR social media.

Please highlight how the PGATOUR will measure return on investment.

Include a detailed budget and calendar for specific media, campaigns, PR events, etc.

## **GUIDING QUESTIONS:**

Use these questions to guide your thinking about the marketing plan that will be proposed to the PGA TOUR.

1. Perform a competitive analysis or environmental business scan to look how other professional sports and entertainment organizations generate Millennial engagement and enhance fan experience at events? How could these be adapted to attract Millennials to PGA TOUR events?
2. Describe "the customer journey" for the PGA TOUR fan? That is, how does the fan become interested in PGA TOUR events? How does that interest evolve? What converts a fan who views the events through various media, to a desire to attend a PGA TOUR tournament?

3. Identify the major forms of social media popular with Millennials, and describe the advantages and disadvantages of using each platform.
  - a. How would each be best used for engaging Millennials with the PGA TOUR?
  - b. How could the PGA TOUR increase the number of followers on Twitter and the PGATOUR app?
  - c. Should there be different content targeted to fans following tournaments on-site vs. off-site? How should that be managed?
4. Review the various PGA TOUR platforms and affiliations, i.e. the PGATOUR.com page, its social media accounts, and related sites such as SkratchTV.com. How can the various digital platforms be integrated into seamless marketing communication that embraces the diversity of their millennial fans while not alienating the core fan?

Can this plan be integrated with an execution plan for on-site activations throughout the tournaments?

5. Design and explain one or more on-site activities for pre-tournament, during-the-tournament, and post-tournament events that would attract Millennials and enhance their tournament experience.
  - a. Be specific about targeted fan profiles, e.g. golf fans, non-golfers/those who enjoy the social aspect, those new-to-the-game, and various lifestyles and/or demographics.
  - b. How can the PGATOUR facilitate the development of brand communities, consumers who have high level of brand engagement, around TOUR events?

*Suggestion: in addition to social media advertising, consider sourcing a direct marketing contact list from Nextmark.com, or other list providers, to target specific customer groups and lifestyles to PGA TOUR events. NextMark.com has many lists that include cost information based on the level of precision and type of list.*

6. Develop and explain how current and potential sponsors could be involved in the on-site experience for fans. Be clear about the events and tactics that would attract specific brands or other sponsorships.

How could some of these sponsored events be attractive to both on-site fans and viewers on various media platforms? How could they be used to attract the home audience to attend a PGATOUR event?

## Appendix A

### PGA TOUR Schedule 2017-2018

| Date   | Tournament                           | Location    |
|--------|--------------------------------------|-------------|
| Oct 8  | Safeway Open                         | California  |
| Oct 15 | CIMB Classic                         | Malaysia    |
| Oct 22 | CJ Cup                               | South Korea |
| Oct 29 | WGC-HSBC Champions                   | China       |
| Oct 29 | Sanderson Farms Championship         | Mississippi |
| Nov 5  | Shriners Hospitals for Children Open | Nevada      |
| Nov 12 | OHL Classic at Mayakoba              | Mexico      |
| Nov 19 | RSM Classic                          | Georgia     |
| Jan 7  | Sentry Tournament of Champions       | Hawaii      |
| Jan 14 | Sony Open in Hawaii                  | Hawaii      |
| Jan 21 | CareerBuilder Challenge              | California  |
| Jan 28 | Farmers Insurance Open               | California  |
| Feb 4  | Waste Management Phoenix Open        | Arizona     |

| Date   | Tournament                                     | Location           |
|--------|--|--------------------|
| Feb 11 | AT&T Pebble Beach Pro-Am                       | California         |
| Feb 18 | Genesis Open                                   | California         |
| Feb 25 | The Honda Classic                              | Florida            |
| Mar 4  | WGC-Mexico Championship                        | Mexico             |
| Mar 4  | Puerto Rico Open                               | Puerto Rico        |
| Mar 11 | Valspar Championship                           | Florida            |
| Mar 18 | Arnold Palmer Invitational                     | Florida            |
| Mar 25 | WGC-Dell Technologies Match Play               | Texas              |
| Mar 25 | Corales Puntacana Resort and Club Championship | Dominican Republic |
| Apr 1  | Houston Open                                   | Texas              |
| Apr 8  | <b>Masters Tournament</b>                      | Georgia            |
| Apr 15 | RBC Heritage                                   | South Carolina     |
| Apr 22 | Valero Texas Open                              | Texas              |
| Apr 29 | Zurich Classic of New Orleans                  | Louisiana          |

| Date   | Tournament                                  | Location       |
|--------|---|----------------|
| May 6  | Wells Fargo Championship                    | North Carolina |
| May 13 | The Players Championship                    | Florida        |
| May 20 | AT&T Byron Nelson                           | Texas          |
| May 27 | Dean & DeLuca Invitational                  | Texas          |
| Jun 3  | The Memorial Tournament                     | Ohio           |
| Jun 10 | FedEx St. Jude Classic                      | Tennessee      |
| Jun 17 | <b>U.S. Open</b>                            | New York       |
| Jun 24 | Travelers Championship                      | Connecticut    |
| Jul 1  | The National                                | TBA            |
| Jul 8  | Greenbrier Classic                          | West Virginia  |
| Jul 15 | John Deere Classic                          | Illinois       |
| Jul 22 | <b>The Open Championship</b> (British Open) | Scotland       |
| Jul 22 | Barbasol Championship                       | Kentucky       |
| Jul 29 | RBC Canadian Open                           | Ontario        |
| Aug 5  | WGC-Bridgestone Invitational                | Ohio           |

| Date   | Tournament                     | Location       |
|--------|--------------------------------|----------------|
| Aug 5  | Barracuda Championship         | Nevada         |
| Aug 12 | <b>PGA Championship</b>        | Missouri       |
| Aug 19 | Wyndham Championship           | North Carolina |
| Aug 26 | The Northern Trust             | New Jersey     |
| Sep 3  | Dell Technologies Championship | Massachusetts  |
| Sep 9  | BMW Championship               | Pennsylvania   |
| Sep 23 | Tour Championship              | Georgia        |



## Appendix B

### PGA TOUR 2017-2018 Sponsors

*\*\*\*Full Descriptions can be found on <https://www.pgatour.com/company/omps.html>*

#### **ACE HARDWARE**

Ace Hardware is proud to be the Official Hardware Store of the PGA TOUR and PGA TOUR Champions. With more than 90 years of helpful service and locally-owned retailers in all 50 states and approximately 60 countries, Ace works closely with the PGA TOUR on a program whereby tournaments on the PGA TOUR, PGA TOUR Champions, Web.com Tour, PGA TOUR Latinoamérica, PGA TOUR Canada and PGA TOUR China, as well as the PGA TOUR's TPC Network, have the opportunity to purchase products efficiently, cost-effectively and conveniently through Ace. Just as Ace does with its customers that shop their 4,800 neighborhood stores across the globe, the company is honored to help the PGA TOUR take care of their 'homes' - the golf courses and facilities in which they operate.

#### **ARBY'S**

Arby's, the first nationally-franchised sandwich restaurant brand with more than 3,300 restaurants worldwide, is the Official Restaurant of the PGA TOUR. Arby's restaurants feature Fast Crafted® service, a unique blend of quick-serve speed and value combined with the quality and made-for-you care of fast casual. Arby's and the PGA TOUR have partnered on digital media campaigns, tournament activations and more. This expands upon Arby's initial foray into professional golf through a sponsorship of PGA TOUR player Andrew "Beef" Johnston.

#### **ASTELLAS**

Astellas is a pharmaceutical company dedicated to improving the health of people around the world through the provision of innovative and reliable pharmaceutical products. As the manufacturer of Myrbetriq® (mirabegron), the Official Overactive Bladder Medication of the PGA TOUR®, we are thrilled to sponsor the PGA TOUR Volunteer Appreciation Program and the PGA TOUR Must-See Moments Sweepstakes.

#### **AVIS**

Avis Car Rental is proud to be the official rental car of the PGA TOUR, PGA TOUR Champions and Web.com Tour. Avis Car Rental and its subsidiaries operate one of the world's best-known car rental brands, providing business and leisure customers with a wide range of services at approximately 5,100 locations in more than 165 countries.

#### **BH SPORTS**

BHSports is proud to produce on behalf of the PGA TOUR, the bi-annual two-part official PGA TOUR Essential Guide to Golf. The publications contain extensive tournament event coverage, analysis, statistics and insights, along with the world's top player profiles. Additionally, there are feature articles in each of the publications by leading golf writers and commentator, giving a unique perspective on the season's greatest players and tournaments.

#### **BRIDGESTONE TIRE**

Bridgestone, a world leader in tire innovation and technology, is the Official Tire of the PGA TOUR and PGA TOUR Champions. Just as Bridgestone helps drivers all over the world get the most out of their cars, a large part of its TOUR sponsorship is aimed at helping golfers get the most out of their games. Bridgestone's integrated, multi-media marketing program includes a series of short, instructional "Improve Your Drive" videos that appear on PGATOUR.com and feature Bridgestone PGA TOUR players Matt Kuchar, Will MacKenzie, Brandt Snedeker and Kevin Stadler providing helpful golf tips.

Bridgestone also has an exciting on-site component at select PGA TOUR events. The "Improve Your Drive" expo features the Bridgestone Golf Ball Fitting Challenge. Golf fans can actually demo several golf ball brands and find out which ball is best for their own game. And, of course, Bridgestone continues to be the title sponsor for the Bridgestone Invitational, one of four prestigious World Golf Championships. The First Tee, an initiative of the World Golf Foundation, is the primary beneficiary of the World Golf Championships and the Bridgestone Invitational.

**CAREERBUILDER**

As the global leader in human capital solutions, CareerBuilder specializes in HR software as a service to help companies with every step of the recruitment process from acquire to hire. Its online career site, CareerBuilder.com®, is the largest in the United States with more than 24 million unique visitors and 1 million jobs. CareerBuilder works with the world's top employers, providing job distribution, sourcing, workflow, CRM, data and analytics in one pre-hire platform. Owned by TEGNA Inc. (NYSE:TGNA), Tribune Media (NYSE:TRCO) and The McClatchy Company (NYSE:MNI), CareerBuilder and its subsidiaries operate in the United States, Europe, South America, Canada and Asia.

**CAREY INTERNATIONAL**

Carey is the Official Transportation Company of the PGA TOUR and PGA TOUR Champions. The Carey partnership is a valuable benefit for TOUR professionals who are among the most highly traveled in sports. Carey provides complimentary services to TOUR professionals and develops custom transportation programs including on-site management and coordination for tournament events, title sponsors and corporate hospitality.

**CDW**

CDW is the Official Technology Partner of the PGA TOUR and PGA TOUR Champions. The PGA TOUR and CDW announced a five-year extension of their business and marketing relationship that extends through 2021. As a leading provider of technology solutions, CDW works with the TOUR to enhance its technological capabilities in a variety of areas. These include the continued advancement of the TOUR's ShotLink scoring system, expansion of technology-based solutions that improve the fan experience and advancement of the TOUR's operation for players and staff, plus the introduction of digital asset management at PGA TOUR Productions. In addition, the TOUR looks to CDW to improve on-site data communications between ShotLink, the media center, the broadcast compound and other locations.

**CHARLES SCHWAB**

Charles Schwab is the Official Investment Firm of the PGA TOUR and PGA TOUR Champions. In the nineteenth year of this successful partnership, Schwab continues its support of the tournaments, players, administrators and fans of golf. Charles Schwab provides investment education services, one-on-one consultations with Schwab financial consultants and a variety of investment tools to PGA TOUR and PGA TOUR Champions players, as well as to TOUR administrators and employees.

Through this sponsorship, Schwab supports many of the individual tournaments that comprise the PGA TOUR. On the PGA TOUR Champions, the Charles Schwab Cup returns for its fifteenth season. The Charles Schwab Cup program includes not only the sponsorship of the season-long, points-based competition culminating in the Charles Schwab Cup Championship, the PGA TOUR Champions's season-ending event, but also marketing and advertising support of local tournament telecasts.

**CITI**

Citi is proud to be the first-ever Global Partner of The Presidents Cup, an event that builds bridges among countries, embraces the spirit of teamwork, and benefits many of the communities Citi serves around the world. A sponsor of The Presidents Cup since 2009, Citi is proud to maintain a strong partnership with the PGA TOUR and to support a tournament whose winners donate their winnings to a charity of their choice, extending the impact of this event outside the ropes and into communities around the world.

**COCA-COLA**

Coca-Cola is an Official Sponsor of the PGA TOUR, PGA TOUR Champions and the Web.com Tour with a series of official categories and designations, including soft drinks, juice, isotonic beverages, sports drinks, energy drinks and water. In addition to the official marketing relationship, Coca-Cola is the Presenting Sponsor of the TOUR Championship at historic East Lake Golf Club in Atlanta. The charitable beneficiaries of the TOUR Championship by Coca-Cola include the East Lake Foundation and The First Tee.

**EZLINKS GOLF LLC**

EZLinks Golf LLC, a PGA TOUR affiliated company, produces industry-leading software and services to power the operations and marketing needs of the golf industry. Founded in 2015 by the PGA TOUR and EZLinks Golf, Inc., EZLinks Golf LLC software and service suite is tailored for golf and includes: tee sheet, point of sale, 24/7 reservation center, online booking engines, marketing services, 24/7 support and TeeOff.com by PGA TOUR – an online tee time marketplace connecting millions of golfers with tee times at golf courses worldwide.

**FedEx**

FedEx is proud to deliver the FedExCup competition to golf fans. Now in its 12th season, the FedExCup is an exciting season-long points competition that has set a new standard for excellence and ushered in a thrilling new era for professional golf. Over the span of 49 events, players vie to become the FedExCup Champion, which distinguishes one player who not only performs well during the PGA TOUR Season, but also excels through the pressure of the four-event FedExCup Playoffs.

**FORTUNE**

FORTUNE is the Official Business Knowledge Sponsor of the PGA TOUR and PGA TOUR Champions. FORTUNE is the premiere global, digital, mobile and social brand for premium business news and insights. FORTUNE covers bold innovators, smart companies, new ideas and innovative strategies that inspire the FORTUNE audience to accelerate their business success. FORTUNE is a global leader in business journalism with a combined audience of more than 9 million readers in print and online.

**GETTY IMAGES**

Getty Images is the Official Photographic Services Provider of the PGA TOUR and PGA TOUR Champions. As the exclusive provider of all PGA TOUR and PGA TOUR Champions competition photography, Getty Images holds the exclusive commercial rights for the licensing and digital distribution of PGA TOUR photography and photo archives to consumer and corporate clients. Their network of professional photographers, working alongside PGA TOUR photographers, provides extensive coverage of the PGA TOUR, PGA TOUR Champions and Web.com Tour to the worldwide editorial marketplace.

Getty Images operates the PGA TOUR Images website ([www.pgatourimages.com](http://www.pgatourimages.com)), a comprehensive source of official PGA TOUR images designed for licensing purposes. Those images are also made available to an audience of 4 million unique users every month on [www.gettyimages.com](http://www.gettyimages.com). Through Getty Images commending technology and Web site, the PGA TOUR is able to directly reach significantly more outlets than ever before, bringing even greater levels of exposure for players, tournaments and business partners.

**GOLD DIGEST**

Golf Digest is proud to be the Official Golf Publication of the PGA TOUR and PGA TOUR Champions.

Golf Digest is the No. 1, most widely-read golf publication in the world and the authority on how to play, what to play and where to play. Golf Digest's aim is to enhance the enjoyment of all facets of the game, making its readers better players, smarter consumers and more discerning travelers while offering the kind of informative and provocative stories that fuel the unending conversation that is golf. Golf Digest's mantra is THINK YOUNG/PLAY HARD, a philosophy that defines both its reader and editorial alike, and is what differentiates Golf Digest from the competition. It's not just about swing speed—it's a way of life.

**GREY GOOSE**

GREY GOOSE is the Official Spirit of the PGA TOUR. Today, GREY GOOSE raises a glass to the PGA TOUR®. As a leader on and off the course, it's a soaring example of the success that comes from passionately pursuing the extraordinary.

**HAWAII TOURISM AUTHORITY**

In January 2001, the Hawaii Tourism Authority entered into an Official Marketing Relationship with the PGA TOUR as the Official Sponsor of the Aloha Season. The relationship combines individual TOUR-related golf tournaments held annually in Hawaii into a marketing package that serves as the cornerstone for the state's \$1-billion golf industry.

**JOHN DEERE**

John Deere is the Official Golf Course Equipment Supplier, Landscape Product Supplier and Golf Course Equipment Leasing Company of the PGA TOUR. John Deere provides equipment to the PGA TOUR network of Tournament Players Clubs and Courses (TPCs) and is title sponsor of the John Deere Classic. Deere provides a full range of golf and turf equipment, along with utility vehicles and selected construction equipment, on an exclusive basis to each of the TOUR's owned and operated TPC courses. As courses are added to the TPC network around the world, each new course will be groomed with John Deere equipment.

**KONICA MINOLTA**

Konica Minolta Business Solutions U.S.A., Inc. is proud to be the Official Multifunction Printer of the PGA TOUR. Konica Minolta has been recognized as the #1 Brand for Customer Loyalty in the MFP Office Copier Market by Brand Keys for eight consecutive years.

**MACKENZIE INVESTMENTS**

Mackenzie Investments is umbrella sponsor of PGA TOUR Canada - Mackenzie Tour

Mackenzie Investments was founded in 1967 and is a leading investment management firm providing investment advisory and related services to retail and institutional clients. The company has \$71 billion in assets under management, and as part of IGM (a subsidiary of the Power Financial Group of Companies), is the largest independent asset manager in Canada, with \$142 billion.

**MASSAGE ENVY**

Massage Envy is the Official Total Body Care Sponsor of the Player Performance Centers. Massage Envy, based in Scottsdale, Arizona, is a national franchisor and, through its franchise locations, is the leading provider of therapeutic massage and skincare services.

**MASTERCARD**

Mastercard is proud to be the Preferred Payment of the PGA TOUR, PGA TOUR Champions and presenting sponsor of the Arnold Palmer Invitational. Mastercard implements the newest payment technologies at golf programs and events across the United States to enhance the PGA TOUR fan experience. Mastercard is committed to delivering exclusive access, experiences and benefits on and off the course through the company's Priceless Golf, Priceless Cities and Priceless Surprises programs.

**MD ANDERSON**

The University of Texas MD Anderson Cancer Center is the official cancer center of the PGA TOUR. Established in 2015, MD Anderson will use the relationship to educate the golf community and general public on how to reduce cancer risk.

**METLIFE**

MetLife is the Official Life Insurance Sponsor, Official Life/Dental/Vision Benefits Sponsor and an Official Worksite Benefits Sponsor of the PGA TOUR and PGA TOUR Champions.

MetLife, Inc. (NYSE: MET), through its subsidiaries and affiliates ("MetLife"), is one of the largest life insurance companies in the world. Founded in 1868, MetLife is a global provider of life insurance, annuities, employee benefits and asset management.

**MICHELOB ULTRA**

Michelob ULTRA is the Official Beer of the PGA TOUR and PGA TOUR Champions. Anheuser-Busch has participated in the TOUR's Official Marketing Partner program since 1994, celebrating over 20 years with the PGA TOUR. Michelob ULTRA is a smooth, refreshing light lager brewed using the finest pale two-row and six-row barley, select grains, all-imported hops and a pure cultured yeast strain. With only 95 calories and 2.6 carbs per 12-ounce serving, Michelob ULTRA encourages adult beer drinkers to "Live Life to the ULTRA" by leading active lifestyles. The Michelob ULTRA Family of Beers also includes Michelob ULTRA Amber, three Michelob ULTRA Fruit flavors - Lime Cactus, Dragon Fruit Peach and Pomegranate Raspberry and ULTRA 19th Hole, a refreshing mix of tea and lemonade.

## **MICROSOFT**

Microsoft is proud to be an Official Sponsor of the PGA TOUR and PGA TOUR Champions as well as the:

- Official Operating System of the PGA TOUR and PGA TOUR Champions,
- Official Analytics Partner of the PGA TOUR and PGA TOUR Champions and
- Official Office Personal Productivity Software of the PGA TOUR and PGA TOUR Champions.

Microsoft works with the TOUR to deliver innovative technology solutions -- built on Windows 10, the Microsoft Cloud and Microsoft Office -- that instantaneously mine the TOUR's vast video library and statistical information to make data analysis easier to interpret and understand. For golf fans everywhere, this means instant insight about players, courses, conditions and competition. Microsoft and the PGA TOUR are producing deeper, richer and more immersive content for fans to consume across all devices.

The PGA TOUR is also enhancing its employee productivity and infrastructure with the addition of Microsoft's newest products as a part of its back-end business operations and loyal volunteer community. This includes Windows 10, Office 365, the Microsoft Cloud, Microsoft Surface and Lumia devices.

## **MITSUBISHI ELECTRIC**

Mitsubishi Electric is the Official Large Outdoor Video Display Provider and the Official HVAC Products of the PGA TOUR and PGA TOUR Champions.

The Diamond Vision LED Scoreboards are featured at over 40 PGA TOUR tournaments, bringing a new level of interaction and excitement. Mitsubishi Electric recently increased its involvement with the PGA TOUR by building 12 new Diamond Vision boards for the PGA TOUR Champions. The Diamond Vision boards have significantly upgraded the on-site fan experience through a variety of videos as well as an array of player and course information and graphics generated by the TOUR's real-time scoring system.

## **MORGAN STANLEY**

Morgan Stanley is a Proud Partner of THE PLAYERS Championship. In addition to this exclusive designation, Morgan Stanley will continue to sponsor breakfast and lunch for Executive Women's Day at 10 PGA TOUR events for the third year, including THE PLAYERS. Executive Women's Day, a part of the PGA TOUR's Women's Initiative, engages women in PGA TOUR tournament markets through a forum that brings together hundreds of local business leaders and innovators for a day to discuss personal and career development, share ideas and expand their networks.

## **NETJETS**

Since 2014, NetJets has been proud to be The Official Private Jet Sponsor for the PGA TOUR. We understand that life is a never-ending balancing act for the players. And we're dedicated to offering the fastest, easiest means of travel that simultaneously helps the PGA TOUR Members maximize their time. As the worldwide leader in private aviation with the largest, most diverse fleet in the world -- nearly 700 aircraft worldwide -- NetJets guarantees ultimate accessibility and flexibility with a flight in as little as 10 hours. Our pilots and crews are the most experienced and best-trained in the industry. This commitment to safety offers PGA TOUR Members incomparable peace of mind, allowing them to focus less on the stress of travel and more on their upcoming game and obligations. And ultimately, this leads to greater success inside the ropes.

## **O'DOUL'S**

O'Doul's is enjoying its 18th year as the Official Non-Alcohol Brew of the PGA TOUR and PGA TOUR Champions. The best-selling non-alcohol brew in the United States, O'Doul's also features the PGA Tour logo on a variety of its primary and secondary packaging. O'Doul's and O'Doul's Amber are ideal alternative malt beverages for those consumers who enjoy the great taste of beer but prefer not to have the alcohol.

## **QUICKEN LOANS**

Quicken Loans® is the "Official Mortgage Sponsor of the PGA TOUR and PGA TOUR Champions" and title sponsor of the Quicken Loans National. As an eleven-time J.D. Power Award winner for client satisfaction, Quicken Loans leverages the sponsorship through consumer promotions and fan engagement, and gives golf fans a simple, easy process and amazing mortgage experience. Quicken Loans has a strong tradition of honoring and supporting military personnel and will continue that tradition in conjunction with the Quicken Loans National in Washington, D.C.

## **ROLEX**

Internationally recognized as the premier luxury timepiece, Rolex has been leading the watch industry since the company was founded in the early 1900's. With an unrivaled reputation for superb craftsmanship and quality, Rolex is best known for its many innovations including the Oyster case, self-winding Perpetual rotor and Day-Date feature. Today, Rolex supports premier events throughout the world with a presence in equestrian events, golf, motorsports, tennis, yachting, culture and arts, as well as philanthropic programs. The Rolex association with golf began in 1967 when Arnold Palmer was presented with a gold Oyster Perpetual watch to honor his many achievements. Since that time Rolex has forged relationships with many of the game's greatest players and its major organizations. Integrity, precision and the skillful pursuit of excellence have made Rolex and golf perfect partners.

## **SERVPRO**

SERVPRO® is proud to be the Official Cleanup and Restoration Company of the PGA TOUR.

SERVPRO® will initiate marketing efforts across multiple PGA TOUR platforms; including tournament activation, national media, access to national TPC courses and business networking opportunities. In the upcoming year, SERVPRO® will partner with the PGA TOUR and TPC Clubhouses to develop emergency 'Ready' plans to insure business preparedness in case of weather related or other disasters.

## **SOUTHERN COMPANY**

With more than 9 million customers, 44,000 megawatts of generating capacity and 1,500 billion cubic feet of combined natural gas consumption and throughput, Atlanta-based Southern Company (NYSE: SO) is America's premier energy company serving the Southeast through its subsidiaries.

A leading U.S. producer of clean, safe, reliable and affordable energy, Southern Company owns electric utilities in four states, natural gas distribution utilities in seven states, a competitive generation company serving wholesale customers across America and a nationally recognized provider of customized energy solutions, as well as fiber optics and wireless communications.

## **STRYKER**

Stryker provides the "Official Joint Replacement Products of the PGA TOUR and PGA TOUR Champions." The sponsorship advances Stryker's commitment to the health and well-being of joint pain sufferers, and will feature opportunities for golf fans to learn about Stryker products at PGA TOUR and PGA TOUR Champions events. Information about Stryker's joint pain solutions and sponsorship of PGA TOUR Champions Professional's Fred Funk and Hal Sutton can be found by visiting [www.movewithstryker.com](http://www.movewithstryker.com)

## **TEE OFF.COM BY PGA TOUR**

TeeOff.com ([www.teeoff.com](http://www.teeoff.com)) is the Official Tee Time Booking Engine of the PGA TOUR. Offering more than 500,000 tee times at 3,000+ courses worldwide, TeeOff.com offers golfers the chance to "Golf More" with exclusive deals not found anywhere else at some of the world's best courses. TeeOff.com by PGA TOUR also serves as a powerful advertising platform for brands looking to connect with the millions of golfers in its database or that book tee times through the site.

## **TIFFANY & CO.**

Tiffany & Co. is an Official Award and Gift Provider of the PGA TOUR, PGA TOUR Champions and Web.com Tour. Tiffany & Co. creates awards for many of the world's greatest sporting events including the Vince Lombardi Trophy for the National Football League, the National Basketball Association Larry O'Brien Championship Trophy, Major League Baseball World Series Trophy and the U.S. Open Tennis Championship Trophies. In 2007, Tiffany & Co., joined forces with the PGA TOUR to create the FedExCup Trophy - a sterling silver spun cup designed for the PGA TOUR's season-long points competition. Tiffany & Co. also produces trophies for several other PGA TOUR and PGA TOUR Champions events such as The Presidents Cup, Northern Trust Open, and Dick's Sporting Goods Open to name a few.

## **TMC USA**

TMC USA is the publisher of TPC Signature, the official magazine of the PGA TOUR® TPC Network. The magazine offers a comprehensive look at the best golf has to offer, including candid interviews with top PGA TOUR pros and golfing celebrities, in-depth coverage of elite destinations, fine dining, spirits and vehicles, and lush, bold photography of the finest courses in the world. With contributions from some of the game's top writers and photographers and luxury content that covers the full spectrum of the golfing lifestyle, each issue of TPC Signature is a keepsake edition sure to impress anyone who loves the game of golf. TMC USA is a boutique publisher with offices in London and New York that creates a range of titles for such clients as the PGA TOUR, Arnold Palmer and others.

## **TRAVELERS**

Travelers is one of the largest commercial property and casualty insurers in the United States. Travelers is the title sponsor to the PGA TOUR's Travelers Championship as well as the Official Property Casualty Insurance Provider of the PGA TOUR and PGA TOUR Champions. In addition, Travelers is an industry leader in providing property/liability coverage for golf facilities through its Eagle 3 program. Since 1988, Eagle 3 has insured PGA TOUR tournaments and the TOUR's Tournament Players Clubs across the country under its Tournament Liability Insurance Program.

## **UNITED AIRLINES**

As the Official Airline of the PGA TOUR®, PGA TOUR Champions and the Web.com Tour, United Airlines is proud to fly golfers and golf fans to over 330 destinations worldwide. United offers the most rewarding loyalty program with MileagePlus® where members have the unique opportunity to use their miles to bid on exclusive PGA TOUR experiences at [exclusives.mileageplus.com/golf](http://exclusives.mileageplus.com/golf). MileagePlus members can also access discounts on tee times and equipment rentals at select TPC® Network properties by visiting [united.com/tpc](http://united.com/tpc). Look for a strong United presence on the PGA TOUR this year in San Francisco (AT&T Pebble Beach Pro-Am), Los Angeles (Genesis Open), Houston (Houston Open), Austin (WGC-Dell Technologies Match Play), Washington D.C. (The National) and New York/New Jersey (THE NORTHERN TRUST).

## **UNITED RENTALS**

United Rentals provides the world's largest fleet of rental equipment to event operations and commercial contractors, as well as public and private works. We offer our customers 830+ locations throughout North America and true 24/7 support, including on-site maintenance day or night, to keep their rental equipment and events/jobsites up and running.

## **USA TODAY SPORTS**

USA TODAY is an Official Marketing Partner of the PGA TOUR and PGA TOUR Champions. USA TODAY Sports brings the most comprehensive digital and print coverage of the PGA TOUR throughout the season highlighting weekly news, tournaments, standings and results across the PGA TOUR, Champions and Web.com Tours. As part of this multi-year marketing relationship, the PGA TOUR and USA TODAY Sports will collaborate on several digital content initiatives in 2014 and beyond, including stats/scoring, news/editorial, and PGA TOUR video. On the print side of the marketing relationship, USA TODAY Sports continues to be the Official Newspaper Partner of the PGA TOUR and PGA TOUR Champions, offering dedicated coverage on Thursdays and Fridays.

## **VALSPAR**

Valspar® is proud to be Official Paint of the PGA TOUR and Title Sponsor of the Valspar Championship, the Most Colorful PGA TOUR Tournament in the World.

Headquartered in Minneapolis, Valspar is a 208-year-old global leader in paint and coatings, best known for its colorful paints and reassuring color guarantee. Valspar consumer paints are widely available at home centers, hardware stores and locally owned paint stores, but Valspar also makes colorful and protective coatings for some of the world's most-recognized brands, including the red of Coca-Cola cans, the yellow of Case construction equipment and the iconic green of John Deere equipment.



**WILLIAM HILL ESTATE WINERY**

William Hill Estate Winery is the official wine of the PGA TOUR. With roots deeply anchored in the Napa Valley, William Hill Estate crafts luxury wines from the undiscovered vineyards of California's most celebrated regions. Beginning with William Hill Estate's 140-acre benchland vineyard near the Silverado Trail, Winemaker Mark Williams turns to the hidden corners of southern Napa, the North Coast and the Central Coast to create a unique collection of rich, expressive wines.

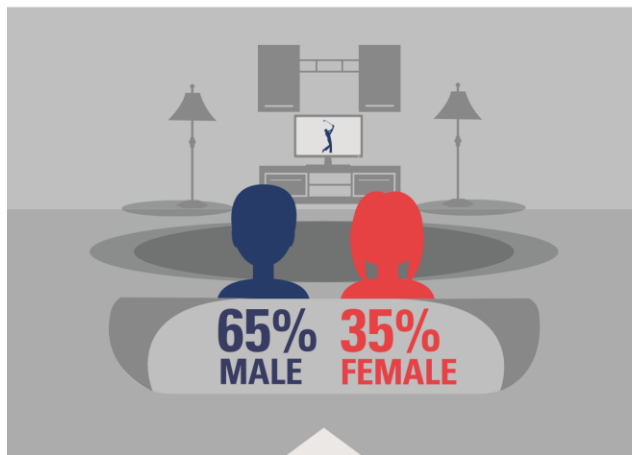
**WEB.COM**

Web.com is dedicated to helping small businesses succeed online, and sees its umbrella sponsorship of the Web.com Tour as an extension of that mission. As part of its official marketing partnership, Web.com will provide website design and online marketing services for all TOUR players, tournaments and charities associated with the Web.com Tour, the PGA TOUR and the PGA TOUR Champions. Additionally, Web.com will be bringing its expertise in helping small businesses to the various Tour markets through a series of Web.com Small Business Forums in conjunction with tournament events.



# AUDIENCE REACH & DEMOGRAPHICS

The **PGA TOUR** consistently attracts an audience of affluent, influential & educated individuals. The following is a top line demographic review of **PGA TOUR** television viewers.



## BROADCAST REACH:



Distributed globally, **PGA TOUR** broadcasts > one Billion households.



**PGA TOUR** competition television broadcasts reached > 22 Million viewers per week on average.



More than 161 Million people tuned in to watch **PGA TOUR** broadcasts during the 2015-2016 **PGA TOUR** season.

## DIGITAL FOOTPRINT:



**PGA TOUR** Digital (web + mobile) has seen 7.9 Million average monthly unique users during the 2014-2015 season (October 2014-September 2015).



Television simulcasts & exclusive **PGA TOUR LIVE** streaming combined for nearly 7.4 Million live video streams during the 2014-2015 FedExCup Season.



**PGA TOUR** social media universe has reached 47 Million followers.

## PGA TOUR VIEWERS ARE BUSINESS DECISION MAKERS



**101%**

more likely than average to have the job title of Vice President.

68% more likely than average to be a member of Top Management.

58% more likely than average to have the job title of President.



**70%**

more likely than average to be a decision maker for purchases of \$500,000 or more.

61% more likely than average to be a decision maker for purchases of \$1 Million or more.



**116%**

more likely than average to be a Business Influential.

64% more likely than average to have a C-Suite job title.

Source: Nielsen Media Research, GFK MRI Doublebase 2016

## PGA TOUR VIEWERS ARE AFFLUENT AND EDUCATED



**135%**

more likely than average to personally own \$250,000 or more in investments.

67% more likely than average to have a household net worth of \$1 Million or more.

69% more likely than average to have a household income of \$250,000 or more.



**86%**

more likely than average to have a vacation or weekend home.

33% more likely than average to have a home valued at or more than \$750,000.



**38%**

more likely than average to have a Masters degree.

40% more likely than average to have a Post-Grad degree.

Appendix D

**PGA TOUR Social Media Audience**

**PGA TOUR Social Media Audience - November 2017**

| Age %     |          |         |           |         |       |            |
|-----------|----------|---------|-----------|---------|-------|------------|
| Age Range | Facebook | Twitter | Instagram | YouTube | Total | Age Groups |
| 13-17     | 2.3%     | 7%      | 4%        | 6%      | 5%    | 64%        |
| 18-24     | 17.0%    | 33%     | 23%       | 24%     | 25%   |            |
| 25-34     | 28.0%    | 35%     | 38%       | 35%     | 34%   |            |
| 35-44     | 21.0%    | 12%     | 18%       | 17%     | 16%   | 36%        |
| 45-54     | 16.0%    | 10%     | 11%       | 11%     | 12%   |            |
| 55-64     | 8.0%     | 3%      | 4%        | 5%      | 5%    |            |
| 65+       | 6.0%     | 1%      | 2%        | 3%      | 3%    |            |

| Age Total |           |           |           |         |           |            |
|-----------|-----------|-----------|-----------|---------|-----------|------------|
| Age Range | Facebook  | Twitter   | Instagram | YouTube | Total     | Age Groups |
| 13-17     | 32,170    | 135,397   | 45,668    | 16,755  | 229,990   | 3,054,977  |
| 18-24     | 242,843   | 638,301   | 262,593   | 69,331  | 1,213,068 |            |
| 25-34     | 399,976   | 676,986   | 433,849   | 101,108 | 1,611,919 |            |
| 35-44     | 299,982   | 232,110   | 205,507   | 49,110  | 786,709   | 1,735,315  |
| 45-54     | 228,558   | 193,425   | 125,588   | 31,777  | 579,347   |            |
| 55-64     | 114,279   | 58,027    | 45,668    | 15,022  | 232,996   |            |
| 65+       | 85,709    | 19,342    | 22,834    | 8,378   | 136,263   |            |
| Total     | 1,428,486 | 1,934,246 | 1,141,708 | 288,880 | 4,793,320 |            |
| Median    | 35        | 27        | 31        | 30      | 30        |            |

| Gender % and Total |          |         |           |         |       |
|--------------------|----------|---------|-----------|---------|-------|
| Gender             | Facebook | Twitter | Instagram | YouTube | Total |
| Female             | 16.0%    | 21.0%   | 17.0%     | 5.0%    | 17.6% |
| Male               | 83.0%    | 79.0%   | 83.0%     | 95.0%   | 82.1% |

| Gender Total |           |           |           |         |           |
|--------------|-----------|-----------|-----------|---------|-----------|
| Gender       | Facebook  | Twitter   | Instagram | YouTube | Total     |
| Female       | 228,558   | 406,192   | 194,090   | 14,444  | 843,284   |
| Male         | 1,185,643 | 1,528,054 | 947,618   | 274,436 | 3,935,751 |
| Total        | 1,414,201 | 1,934,246 | 1,141,708 | 288,880 | 4,779,035 |

## Income of Selected Age Groups

### Average Annual Income and Size of US Households, by Generation, 2016

|                     | Income before taxes | Average age of reference person* | Number of people in household |
|---------------------|---------------------|----------------------------------|-------------------------------|
| Millennials         | \$65,373            | 27.9                             | 2.6                           |
| Gen X               | \$95,168            | 43.3                             | 3.2                           |
| Baby boomers        | \$79,736            | 60.2                             | 2.1                           |
| Silent generation   | \$40,230            | 77.1                             | 1.7                           |
| Greatest generation | \$31,272            | 91.0                             | 1.3                           |
| <b>Total</b>        | <b>\$74,664</b>     | <b>50.9</b>                      | <b>2.5</b>                    |

*Note: millennials born 1981 or later; Gen X born 1965-1980; baby boomers born 1946-1964; silent generation born 1928-1945; greatest generation born 1927 or earlier; \*who owns or rents the home*

*Source: US Department of Labor Bureau of Labor Statistics, "Consumer Expenditure Survey: 2016," Aug 29, 2017*

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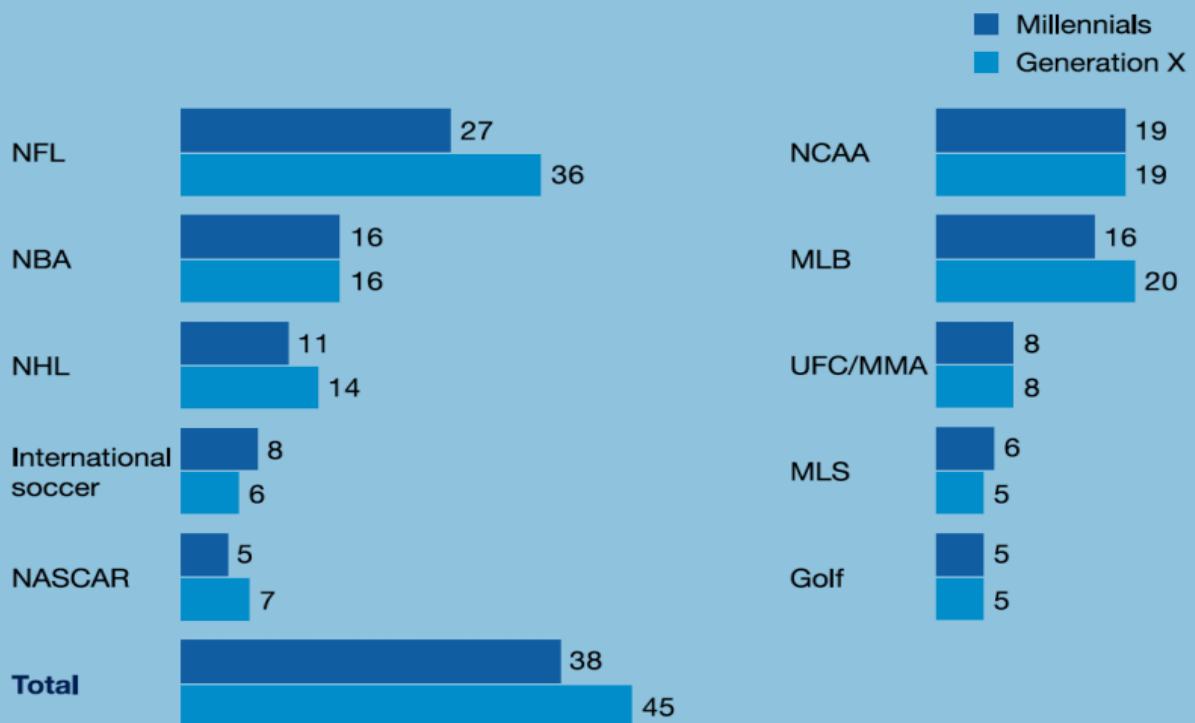
www.eMarketer.com

## Fan Interest in Sports By Generation

### Exhibit 1

**Forty-five percent of Generation X are committed sports fans vs thirty-eight percent of millennials.**

Overview of committed<sup>1</sup> fans by generation and sport  
%<sup>2</sup>

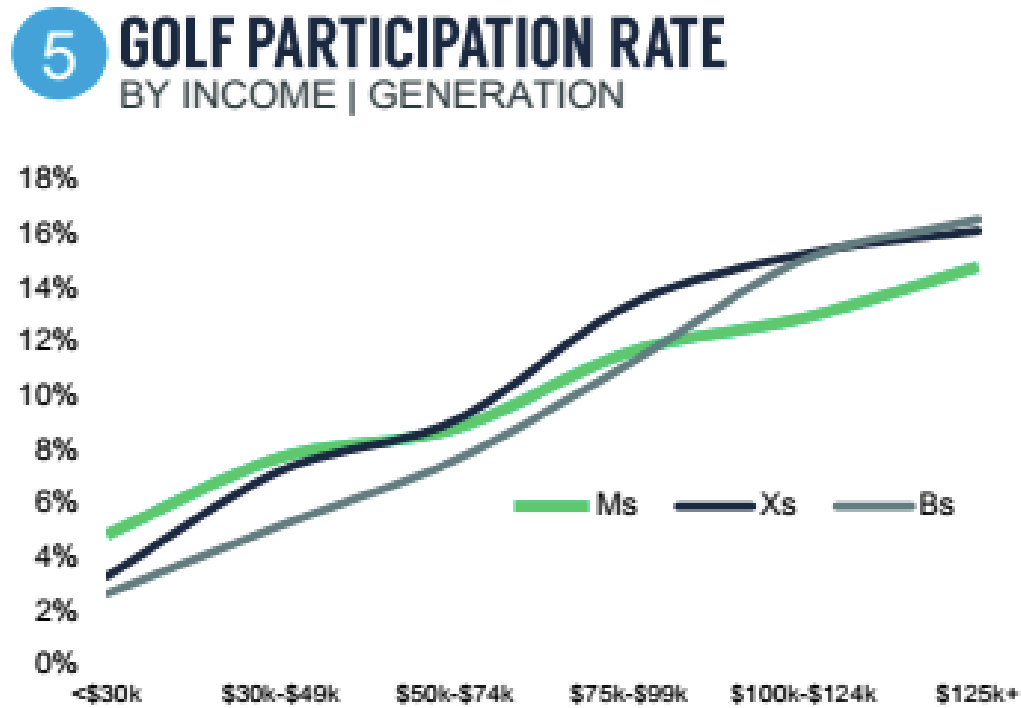


<sup>1</sup>Committed fan refers to fan who identified as average, committed, or avid; excludes non-fan, casual, and very casual.

<sup>2</sup>% of that generation population (eg, 27% of millennials were committed NFL fans).

McKinsey&Company | Source: McKinsey online survey, n=465, June 2017

## Golf Participation Rate by Income and Generation



Source: National Golf Foundation, #Golf and the Millennial Generation, 2015.

Ms = Millennials

Xs = Generation Xers

Bs = Baby Boomers

## Appendix H

### Millennials' Engagement on Social Media

#### **Social Media Sites on Which US Millennial Internet Users Have an Account, by Demographic, Nov 2015**

% of respondents in each group

|                              | Facebook   | Instagram  | Twitter    | Snapchat   | Pinterest  | Tumblr     |
|------------------------------|------------|------------|------------|------------|------------|------------|
| <b>Gender</b>                |            |            |            |            |            |            |
| Female                       | 83%        | 56%        | 40%        | 42%        | 55%        | 19%        |
| Male                         | 79%        | 35%        | 37%        | 31%        | 12%        | 9%         |
| <b>Age</b>                   |            |            |            |            |            |            |
| 18-24                        | 82%        | 50%        | 42%        | 46%        | 34%        | 19%        |
| 25-29                        | 81%        | 39%        | 34%        | 24%        | 33%        | 8%         |
| <b>Race/ethnicity</b>        |            |            |            |            |            |            |
| White                        | 83%        | 41%        | 38%        | 40%        | 38%        | 14%        |
| Black                        | 78%        | 55%        | 45%        | 25%        | 27%        | 11%        |
| Hispanic                     | 77%        | 49%        | 32%        | 34%        | 28%        | 15%        |
| <b>Political affiliation</b> |            |            |            |            |            |            |
| Independent                  | 84%        | 41%        | 35%        | 35%        | 33%        | 12%        |
| Republican                   | 82%        | 43%        | 37%        | 37%        | 38%        | 7%         |
| Democrat                     | 81%        | 53%        | 44%        | 39%        | 34%        | 22%        |
| <b>Total</b>                 | <b>81%</b> | <b>46%</b> | <b>38%</b> | <b>36%</b> | <b>34%</b> | <b>14%</b> |

Note: n=2,011

Source: Harvard University Institute of Politics, "Survey of Young Americans' Attitudes Toward Politics and Public Service: 28th Edition" conducted by GfK, Dec 10, 2015

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## ENDNOTES

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<sup>i</sup> "Tour golfers, PGA settle fuss over tourney control," Spokesman-Review. Spokane, Washington. Associated Press. December 14, 1968. p. 15.

(<https://news.google.com/newspapers?id=dbVWAAAAIAAJ&sjid=cekDAAAAI-BAJ&pg=7296%2C5214308>).

<sup>ii</sup> "Pro Golf Tour Changes Name," The New York Times. August 31, 1981.

<http://www.nytimes.com/1981/08/31/sports/pro-golf-tour-changes-name.html>

<sup>iii</sup> Quinn, Ali, "The Fan Journey – Part 1." PGA TOUR Labs7 Innovation, October 15, 2016.

<http://labs.pgatour.com/2016/10/25/the-fan-journey-part-1/>

<sup>iv</sup> For details about the PGA TOUR app, see <https://itunes.apple.com/us/app/pgatour-mobile/id489689106?mt=8>

<sup>v</sup> PGA TOUR. "The Most Valuable Audience in Sports." PGA TOUR 2015 Research Report.

<https://www.pgatour.com/advertise/audience.html>

<sup>vi</sup> Pew Research Center. Millennials Overtake Baby Boomers as America's Largest Generation. April 25, 2016. <http://prereseach.org/fact-tank/2016/04/25/millennials-overtake-baby-boomers/>

<sup>vii</sup> U.S. Department of Labor Bureau of Labor Statistics, "Consumer Expenditure Survey: 2016, Aug. 29, 2017. <https://www.bls.gov>

<sup>viii</sup> Dan Singer, "We are Wrong about Millennial Sports Fans," *Media and Entertainment*, McKinsey & Company, October 2017.

<sup>ix</sup> *ibid.*

<sup>x</sup> National Golf Foundation. *#Golf and the Millennial Generation*, 2015.