

The Reality of Simulators: How indoor golf facilities are introducing newcomers to the game

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5th Golf Innovation Symposium



USGA[®]

Today's Panelists



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GOLFZON

What can golf learn from the e-sports phenomenon?



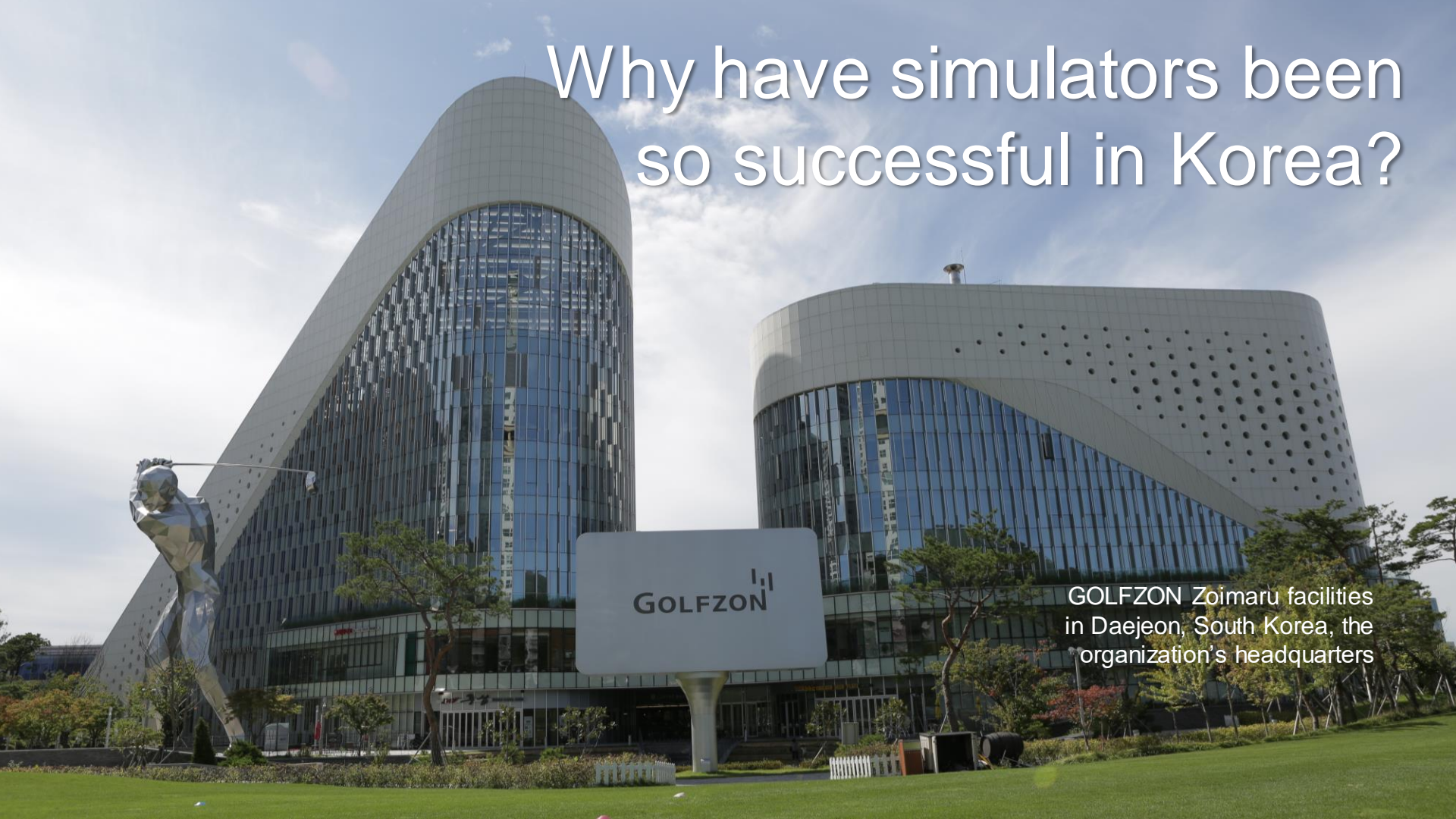
What is the history of golf simulators?



What was Kim Young Chan's vision?



Why have simulators been so successful in Korea?



GOLFZON

GOLFZON Zoimaru facilities in Daejeon, South Korea, the organization's headquarters

What is the impact of simulators in Korea?

35% of **30-year-olds** who are involved in the growth of golf – a much younger demographic than elsewhere – according to the Korea Golf Association, mostly due to screen golf's popularity

60% of all golf is played **indoors** on simulators

80% of new golfers converted to **green-grass golfers**, based on GOLFZON research, including many Korean PGA Tour and LPGA players

5,756 GOLFZON sites in **Korea**, out of 6,202 around the world

57 million **rounds** played on GOLFZON simulators annually

\$2.6 million given out in **prize money (USD)** for professional simulation tournaments in Korea

What does a customer need to use a simulator? What is next for simulator technology?



Golf equipment



Engineers at work



**New sensors and
new putting surface
to be launched soon**

What data is available on a simulator?



2 high-speed cameras, equipped with the T1 Sensor, accurately trace the club movement, the impact and the ball movement

Ball and clubhead speed, angle of attack and ball spin to determine accurate distance and direction



Swing replay allows users to watch their swing after the actual swing

Collects data on all golf clubs from driver to wedges



Provides analysis and saves data to enhance on-course performance

Records scores in simulated rounds for practice or in competition against others in real time globally



What impact has golf simulator technology had on millennials?



How do simulators increase participation?



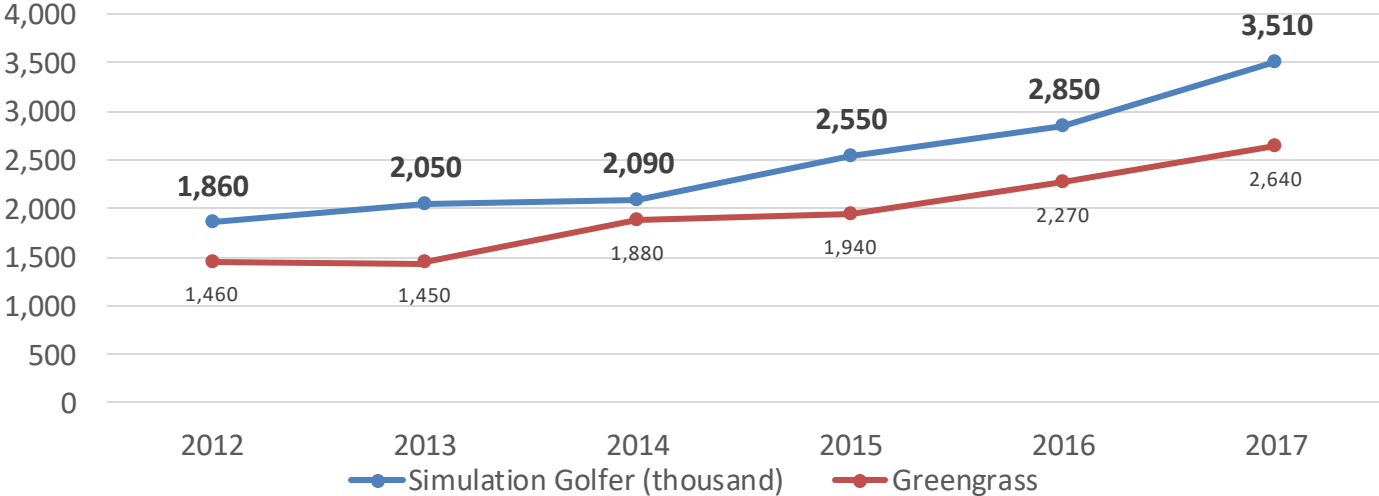
- Break from weather: cold or heat
- Social connectivity with food & beverage
- Ability to practice at all hours with data feedback
- Play rounds in half the time
- Connect globally in real time for competition
- Games improve score, attract latent golfers
- Younger generation and families are more open to simulator golf

How popular are simulator competitions?



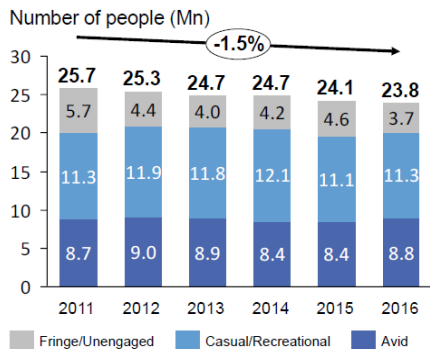
What has been the effect on green-grass golf participation in Korea?

Simulation vs green-grass golf user



What are the key learnings from the first 3 years of GOLFZON being in the U.S. market?

The number of golfers has declined every year for the last 5 years



Total rounds played has not fully recovered from post-recession decline



~60M people who are not playing golf actually want to play – e-golf will provide the pathway from them to ‘play’



US Population	X % Interested in golfing (or more if golfing)	= Number interested in golfing (more)
59 M	14%	8 M
56 M	21%	12 M
20 M	0%	0
90 M	68%	61 M
14 M	43%	6 M
7 M	36%	2 M
6 M	17%	1 M
253 M¹	36%	90 M

Total Population

Source: NGF 2017 Golf Industry Overview

How can simulators help the Japanese golf industry?

- Eliminate intimidation factor
- Teach fundamentals more easily and provide understandable data
- Develop recognition and authenticity of simulator golf
- Overcome perception that simulation golf doesn't improve green-grass skill
- Build simulator-based businesses which drive transition to green-grass golf



How have simulators been used in Japan?

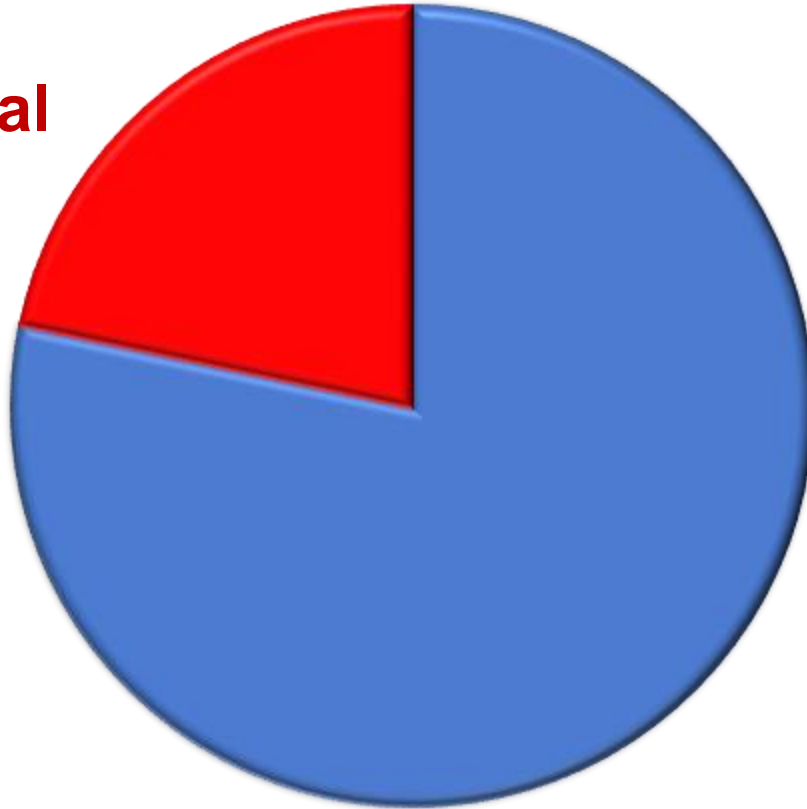
- Practice Center: Driving Range Hibiya (pictured)
- Driving Range at Club: Chiyoda C.C.
- Medical Fitness: Kenmochi Orthopedics



**3,000 Japanese
simulation customers
have transitioned to
green-grass golf**

What are the target markets for simulators in Japan?

23% Residential



77% Commercial

Do you believe players in Japan and the United States would enjoy playing Kasumigaseki C.C. on a golf simulator?

Tokyo 2020 Olympics Golf Competition

Dates

July 28 – August 8, 2020

Site

Kasumigaseki C.C.
Tokyo, Japan



Alison Lee: simulators to grass



Alison Lee video 1

Alison Lee video 2

GOLFZON Questions?



Thank you!

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