PGA Merchandise Show:

A GOLFDOM survey answers questions about the PGA Merchandise Show as a buying influence on the golf professional market

Along with the steady, year by year growth in the size and the importance of the PGA Merchandise Show, has burgeoned an equally steady increase in the number of questions regarding its efficacy as a merchandising event.

Members of the Golf Manufacturers & Distributors Assn. in particular have raised many questions. At their annual meetings traditionally held during the show, they have discussed the suitability of the show's location, timing, format and buying climate. Their concern is not surprising. Hundreds of thousands of dollars of their money are invested in this annual event; naturally, they want assurances that the show is worth the expense, that it is doing the best job for them and their customers, the golf professionals.

Until now, few of these vital questions could be answered with reliable statistics. In an effort to do so, GOLFDOM formally surveyed hundreds of professionals who attended the 1973 PGA Merchandise Show.

From this survey, GOLFDOM found that respondents have attended an average of 7.4 shows; the majority—58 per cent—have attended five or fewer. This fact is significant, because it indicates that new blood is coming into the golf market. Always a healthy sign. Secondly, it dispels a widely-held industry bugaboo: the notion that the show has in large part become a kind of "homecoming" for veteran professionals.

The questions GOLFDOM posed generally broke down into six major topics: 1) show format and physical setup; 2) show timing; 3) show location; 4) professionals' buying habits prior to and during the show; 5) professionals' methods of shopping and covering the show, and 6) professionals' attitudes toward golf car exhibits at the show.

FORMAT AND SETUP

Before getting entangled in detailed questions about the show's format, the professionals were first asked if, over all, the show, as presently set up, was serving them well? Almost 88 per cent replied "yes."

Why did they attend? Responses to two questions also indicated that the show can stand on its own as a lure to professionals, because only 37.1 per cent of the respondents felt that a tournament should be going on concurrently with the show. The remaining 62.9 per cent indicated that the show period should be confined to business. Supporting the majority opinion, almost 52 per cent of the respondents reported that their main purpose for being in Florida in late January, 1973 was to attend the PGA Merchandise Show. Only 13.5 per cent said "to play in a tournament" and another 23 per cent gave vacation as their purpose.

Who should exhibit? The professionals expressed liberal views toward the numbers of individual exhibitors. Almost 67 per cent felt that manufacturers *without* national distribution should be permitted to exhibit. Professionals were more conservative in their attitudes when questioned on the over-all size of the show: 56.4 per cent favored a PGA limit on the total number of exhibitors. More than half of the respondents—52.7 per cent—felt also that merchandise at the show should be exhibited only, not sold.

Who should attend? An overwhelming number of respondents felt that attendance at the show should be limited to golf professionals, pro shop employees and exhibitors, thereby eliminating all guests and the general public.

Two shows? Given the different natures of the apparel business and the playing equipment business, some industry spokesmen have suggested a separate show for each product group. Professionals were very clear in their opinion about this idea. More than 85 per cent replied "No." Eighty-five per cent did favor grouping similar goods in designated areas of the tents; that is, all apparel together, all golf equipment together, all golf cars together, and so on. The method by which professionals cover the show, to be discussed later, largely accounts for this preference.

TIMING

Several manufacturers believe that holding the show in late January is months too late to buy for the upcoming spring-summer season. Although these manufacturers can present a strong case to support their belief, most professionals do not agree. In fact, 73.3 per cent of the respondents felt that the timing of the show was correct for their business and merchandise needs. Some 24.6 per cent did think the show came too late, but only 2.1 per cent adjudged it too early. Of the latter two groups of respondents, almost 49 per cent preferred November for the show; the next largest group, 18 per cent, said October.

How many days? Professionals were definite also about the duration of the show. More than 83 per cent thought the traditional four days was just right.

LOCATION

Reinforcing their opinion that the show can stand on its own, only 37.4 per cent of the professionals felt the show should be held at a golf course location. Nearly 90 per cent said they still would attend the show even if it were held away from a course location. In line with the preceding responses, 78.3 per cent of the professionals would prefer an air-conditioned exhibition hall over the traditional tents.

The respondents were not as favorable toward a major change in geography. More than 92 per cent upheld Florida as the preferred location for the show.

Who will go to Port St. Lucie? The specific location in Florida apparently does not matter greatly. Some 71 per cent of the respondents said they still plan to attend the 1974 show, even though the site has been shifted from the former PGA headquarters at Palm Beach Gardens to Port St. Lucie. Another 22.1 per cent were uncertain about attending, and only 6.5 per cent planned not to attend. Of the latter two groups, however, only 34.7 per cent said the change in the show's location influenced their uncertainty about attending or their decision not to attend.

Although the majority of profes-

continued

WHO GOES AND WHY?

Average number of shows attended to date	7.4
Think the show, as presently set up, serves them well	88%
Like late January as the time for the show	73%
Favor the traditional four full days for the run of the show	83%
Would attend show even if *not* held at golf course location	90%
Plan to attend the '74 at the new Port St. Lucie, Fla., location (Those not planning to attend or uncertain were not greatly influenced in their decisions by switch in location)	71%+
Prefer Florida as show location	92%
Would prefer air-conditioned hall rather than traditional tents	78%
Prefer show to be held at same site each year	82%
Felt tournament should be held concurrently with show	37%
Felt show period should be strictly for show business only (no tournament)	63%
Favor limiting attendance at show to golf professionals, pro shop employees, and exhibitors only, eliminating all guests and the general public	78%
Unfavorable to the idea of two separate shows—one for apparel and one for playing equipment and golf cars	85%
Favor grouping similar products into distinct areas of the same show	85%
"To attend show," as primary purpose for being in Florida in late January 1973	52%
Feel manufacturers *without* national disbribution should be permitted to exhibit	67%
Should be a tight limit on total number of exhibitors	56%
Felt merchandise should be exhibited only at the show—not sold	53%
Percentage of hard and soft goods for 1973 already purchased prior to the 1973 show:	
Hard goods	48%
Soft goods	54%
Percentage of pros who placed orders:	
1) At the 1973 show	60%
2) Soon after returning home from the show	8%
3) Both at show and upon return	32%
For those who actually placed orders at the 1973 show:	
Average percentage of total purchases for 1973 season made at the 1973 show	34%
Average percentage of show purchases that were hard goods	31%
Average percentage of show purchases that were soft goods	40%
Average amount spent by each pro for show purchases	$6,400
Percentage of pros who made any unplanned purchases at 1973 show	84%
Percentage of professionals who purposely held back on prior fall orders for the coming season in anticipation of the 1973 show	54%
Percentages of professionals who held back on fall orders for:	
Men's golf apparel	76%
Women's golf apparel	70%
Irons	46%
Woods	43%
Professionals who bought "show specials"	63%
Professionals who bought:	
Close-out merchandise only	1%+
New merchandise only	52%
Both new and close-out	47%
Professionals who brought someone to show to help with buying	64%
Average number of hours per day spent in show tents	4½
Professionals who had purchase or leasing responsibility for golf cars	42%

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sionals were not concerned about the move to Port St. Lucie, 81.7 per cent said they would prefer the show to be held in the same location each year.

BUYING HABITS

How many bought prior to show? It is known that few professionals wait until the show to do all their buying for the coming season. Although professionals prefer late January for the show, the survey indicates that a goodly amount of merchandise is ordered months earlier, in September, October and November. In fact, respondents indicated that an average of 48.2 per cent of their soft goods purchases and 53.6 per cent of their hard goods purchases for 1973 were made prior to the 1973 show.

Buying at the show—what and how much? Every year the tents buzz with rumors about how much business is being done and who's getting it. Opinions about these matters seldom, if ever, agree.

On the question of orders, the professionals' responses broke down this way: 60.1 per cent placed orders at the 1973 show, 8.1 per cent placed orders upon returning home, 31.8 per cent combined both.

Those placing orders at the show were asked what percentage of their total annual purchases for the 1973 season were made at the 1973 show. Responses averaged to 33.5 per cent of total annual purchases.

Of the show purchases, an average of 31.4 per cent were hard goods and an average of 40.1 per cent were soft goods.

Wholesale dollar volume? For the merchandise indicated above, each professional spent on the average $6,395. Checking where these dollars went, the following are the average percentages of the total expenditure spent on the various products:

1)	Women's golf apparel	21.7%
2)	Men's golf apparel	18.1%
3)	Irons	10.9%
4)	Woods	8.5%
5)	Novelties & accessories	6.0%
6)	Golf balls	5.2%
7)	Golf bags	5.1%
8)	Men's golf shoes	3.9%
9)	Putters	3.7%
10)	Golf gloves	3.6%
11)	Utility clubs	2.9%
12)	Women's golf shoes	2.0%
13)	Other	1.7%
14)	Men's and women's tennis apparel	1.5%
15)	Headcovers	1.1%

Impulse buying? From the survey responses, it is apparent that the show stimulates buying. Asked whether they bought items that they had not planned on buying prior to the show, more than 84 percent of the professionals said yes. Of this group of respondents, 15.4 per cent indicated that their unplanned purchases consisted of soft goods only, 5.4 per cent said hard goods only, and 79.2 per cent reported unplanned purchases in both categories.

Does the show affect prior fall orders? Some professionals apparently will not commit all their dollars for the coming season before looking around the show tents in January. In fact, 53.5 per cent purposely held back on fall orders for the coming season in anticipation of the 1973 show. The largest percentages of professionals indicated that they held back on apparel orders. This practice is not surprising. Many professionals attending the show regard it as their best opportunity to pin down fashion trends and to do some comparison shopping. Here are the percentages of respondents indicating fall order holdbacks for the various product categories:

1)	Men's golf apparel	76.1%
2)	Women's golf apparel	70.3%
3)	Irons	45.9%
4)	Woods	42.6%
5)	Novelties	42.6%
6)	Golf shoes	40.2%
7)	Putters	34.0%
8)	Golf bags	32.5%
9)	Utility clubs	28.7%
10)	Golf gloves	28.2%
11)	Headcovers	19.6%
12)	Golf balls	18.2%
13)	Men's and women's tennis apparel	13.4%
14)	Other	8.1%

Delivery on show orders? How the professional finally views individual exhibitors at the PGA Merchandise Show jells months later when he needs his stock for the season. More than 53 per cent of the respondents said they received delivery on some of the merchandise they ordered at the 1973 show; almost 44 per cent said they received all of the merchandise ordered, and almost 3 per cent indicated they received none.

Of the merchandise that was back ordered or marked not available, professionals most frequently noted men's and women's apparel.

Show specials, close-outs, new merchandise? Professionals attending the show apparently are continually looking for a good deal. More than 63 per cent noted that they took advantage of "show specials." "Close-outs," apparently are not a popular lure for most professionals. Almost 52 per cent indicated that they purchased only new merchandise at the show, whereas 47 per cent bought both new and "close-outs." The few remaining bought "close-outs" only.

Show budget? Only 26.2 per cent of the respondents create a special buying budget for the 1973 show. Of this group, 65.6 per cent stayed within it. Only 10.3 of those who over-spent their budget canceled any orders upon their return from the show.

SHOW SHOPPING TECHNIQUES

If few professionals had special show buying budgets, even fewer brought budget sheets with them to the show. Many professionals (45.3 per cent) attended the 1973 show armed with inventory records. And 63.6 per cent brought someone to the show to help with the buying chores. More than 22.4 per cent brought along their assistants, 18.3 per cent brought their shop managers and 59.3 brought someone other than a person in the aforementioned positions. About 45.2 per cent said that their wives were acting in one of the three categories noted.

The majority of professionals—74.4 per cent—had no difficulty buying at the show from salesmen other than those who call at their shops, and more than 93 per cent gave exhibitors high grades for helpfulness in answering questions about their products.

Most professionals want to maintain the "human" quality of the show. Almost 64 per cent would be unwilling to tape their orders and receive by mail a written verification of the order, regardless of any time saving. However, 57.6 per cent of the professionals would like representatives of each manufacturer to wear a uniform style of dress that quickly identifies them with their respective companies.

Strategy for covering show? More than 57 per cent of the professionals

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had pre-determined the exhibits they wanted to visit at the 1973 show, but fewer—49.4 per cent—budgeted their time. On the average, they spent a little more than 4½ hours a day in the exhibit tents during the run of the show.

More than half of the professionals had some kind of plan for covering the exhibits at the show. Most of these (75.3 per cent) covered a single product classification at a time—apparel, golf equipment, golf cars—which accounts for their favorable attitude toward grouping major product categories in distinct areas of the tents.

During their coverage of the show, 36.3 per cent of the professionals placed orders at more than 10 exhibits, about 46 per cent ordered at five to 10 exhibits, and 12 per cent placed orders at less than five exhibits.

GOLF CAR EXHIBITS

Golf cars at the PGA Merchandise Show are a category unto themselves in terms of the investment they represent and the degree of the professional's authority to purchase them.

Although more than 74 per cent of the professionals visited the golf car exhibits, less than 42 per cent of the professionals were invested with purchase or leasing authority. Of that latter group, only 6.8 per cent placed orders for golf cars at the show.

Golf cars, obviously, are not items about which someone makes quick, on-the-spot decisions. Only 9.1 per cent of the professionals said they have attended a show without a particular brand of golf car in mind, then made their decision and placed an order at the show.

November, October, January, April and March, in that order, were most frequently mentioned by professionals as the months in which their clubs or courses normally make purchase or lease decisions on golf cars.

However, almost 52 per cent of the professionals felt that golf car exhibits were an important part of the show. The reason for this majority opinion is that, although few have purchase responsibility, almost 78 per cent of the professionals surveyed are consulted on brand selection before any purchase or lease is made. The car exhibits, apparently, are excellent sources of information on the various brands and give the professional greater knowledge with which to advise his club. □

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ganizations are good sources of bag room personnel.

Employment inducements. Generally, the only inducements a golf professional needs to attract good people are a moderate salary and a clean, friendly place in which to work. Merchandising skills are up to the professional to manifest in his workers, and the intimacy and leisurely atmosphere of the pro shop makes this training even less difficult. □

WHERE TO FIND CHEFS

The Chef's Referral Assn. is an employment referral service for chefs. Any golf club in need of a chef should provide the association with a job description. CRA then prints the position, along with others, in its weekly job opening list, which is mailed to chef subscribers looking for new jobs. A fee is involved. Contact: Don Jackson, Chef's Referral Assn., Box 1133, Los Altos Calif. 94022 or phone (415) 941-5075.

—from the CMAA *"Outlook"*

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sphere in which no preference system exists and in which there is now an approximate two-year wait for immigrations for aliens for any category.

The effect of HR 981 on clubs would be a divided one. Because many clubs probably employ aliens from what will be low-preference categories, including those with no skills, it seems probable that passage of HR 981 would have some adverse effects. However, clubs also look to aliens to fill many jobs, such as executive chefs and food service managers. These clubs will find themselves in a favorable position should this bill pass.

CONCLUSION

The foregoing constitutes a brief overview of the entire Federal legislative picture in the areas that may have some effect on private clubs. It is obvious that the field is an ever-changing and rapidly shifting one. The National Club Assn.'s principal effort is directed at keeping abreast of the activities and reporting the latest developments to its members and to the industry. □