

Golf Sim Voice Of The Customer

Marketing Intelligence and Deep Insights for Resellers

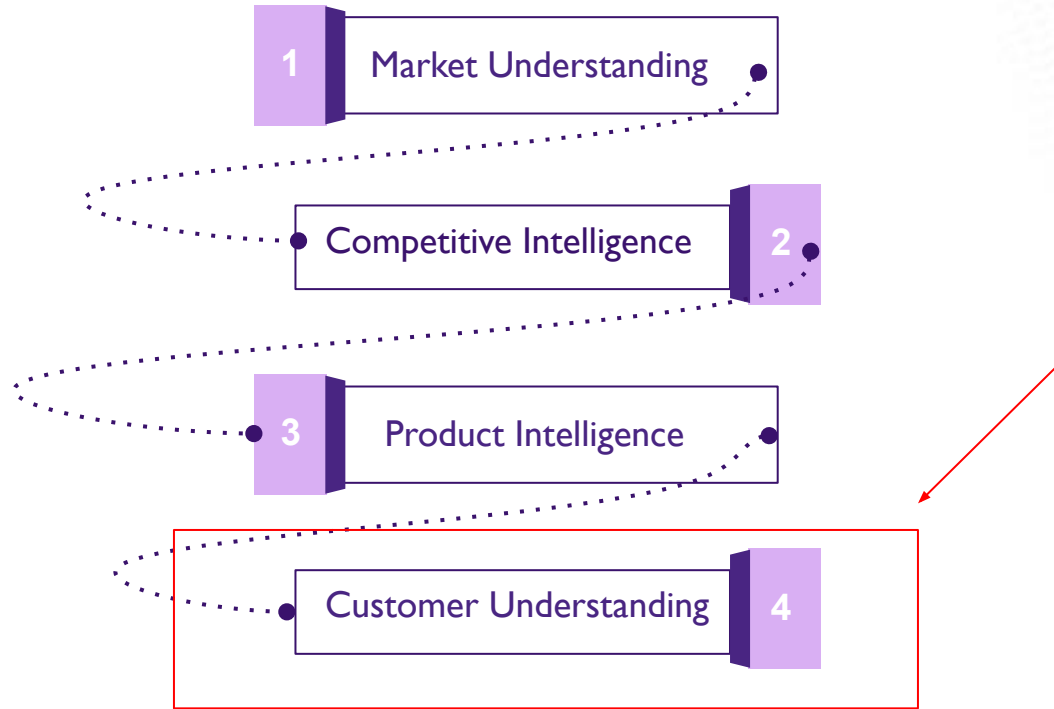
Added value for BenQ partners to drive more revenue

Presenter

Matt Van Alstyne

Sr. Marketing Manager

4 Pillars of Market Intelligence



Opportunity?

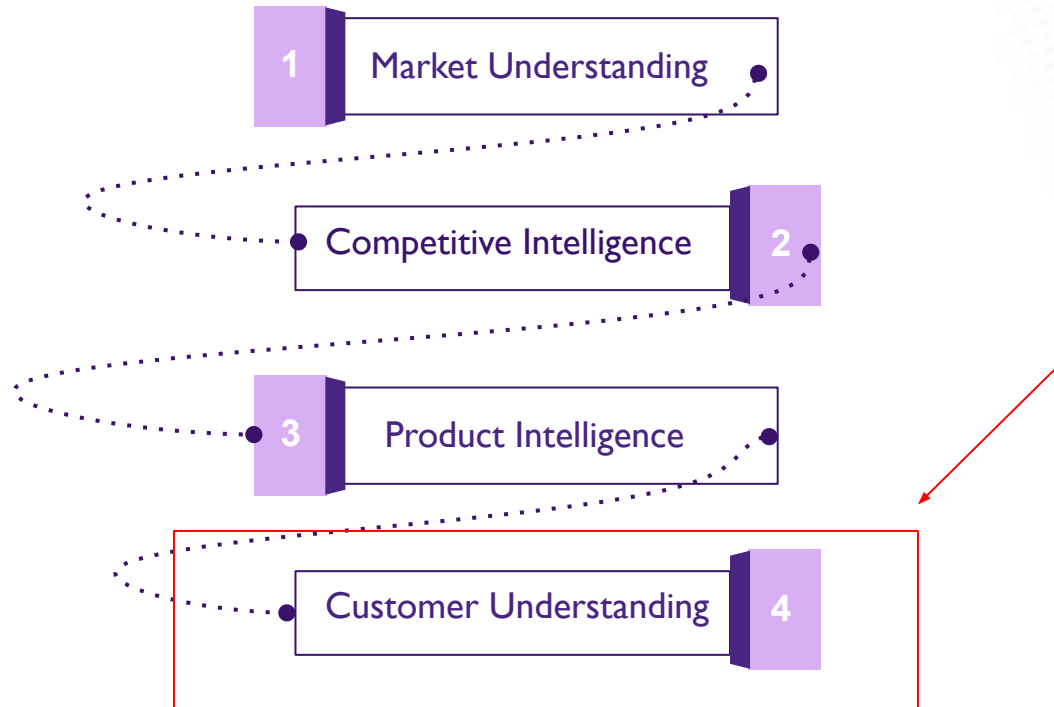
- 4K vs WUXGA?
- Qualitative data is helpful for learning, but not communicating demand
- Prove theories about Golf Sim Projectors



Objective

- Quantifiable data that provides marketing intelligence
- More evidence showing consumers want 4K vs WUXGA
- Build more trust in the golf sim community
- Start to establish the voice of the customer

4 Pillars of Market Intelligence



Voice of the Customer



The leading Conjoint analysis software & tool

 QuestionPro

If you were to buy a TV, select the most likely feature set you would go with:

Brand	Vizio	Sony
Price	USD 1200	USD 1500
Size	36"	36"
	<input checked="" type="radio"/>	<input type="radio"/>

USD 1200

✓



Golf Sim Owner Profile

Goals	Challenges	What motivates them?	Story	Frequency of Golf	HHI	Age	Value Proposition
get the best products for their golf simulation set up	Navigating what projector specs are the most important for a high-quality golf simulation experience.	Fear of not having the best product for their application, the need to show off their golf sim setup in forums, and desire to better their golf game.	Family oriented golfer that participates in golf at least once a month, owns home with a golf simulator setup in their Entertainment/media room. They either have or want swing analysis for their golf simulator. Simple and easy are very important when selecting a golf simulator setup as well as an immersive experience and accurate color. They want to see realistic grass and sand and feel like they are on the course. They prefer a 16:9 impact screen and value a full screen image for golf sim, movie watching and watching golf on tv.	At least once a month	\$80K+	25-44	Build the best immersive experience for your golf simulator with award winning 4K BenQ laser projector technology. Achieve course realism like you have never seen before and delight the family with a multi-purpose SimTheater experience.

*Source: QuestionPro Conjoint Analysis/Survey

Golf Sim Owner Insights



What we heard	What we validated
The customer profile for Golf Simulation is Male 45-65 with HHI \$150K	77% of Male Golf Sim Owners have a HHI \$80-\$199K and 68% of Female Golf Sim Owners have a HHI of \$80-\$199K
Females are not part of the home golf simulation decision	20% golf sim owners surveyed are female who upgraded to TRUE 4K projector since their initial golf sim purchase.
Golf Sim owners like quality and look to forums to get advice and build the best golf simulator for their space.	Golf sim owners with HHI \$100K+ see projector features as the most important component for a golf sim room build. 37% chose Projector Features / Function as their top attribute AND High 4K Resolution was the top projector feature valued for their ideal golf simulation set up.
Consumers believe 4K projectors are very expensive and use the Sony \$80K projector as their reference.	The majority (38%) of Golf Sim Owners surveyed expect a 4K projector to be included in a \$30-50K Sim-In-A-Box golf simulator. 32% say \$10-30K.

Are you missing out on revenue?

*Source: QuestionPro Conjoint Analysis/Survey



Avid Golfer Profile

Goals	Challenges	What motivates them?	Story	Frequency of Golf	HHI	Age	Value Proposition
Bettering their game	Weather, time commitment, simulating different scenarios that come up in a golf game	Lower golf scores, competition, best golf gear	The Avid Golfer is busy but always finds time for golf. They want to better their game and have not thought about golf simulation as an option to traditional course play. The majority of these golfers are between the ages of 25-44.	Once a week	\$80K+	25-44	Add the right tool to your bag. Save time and lower your score, bring purpose, and usefulness to your golf game with an immersive experience that gets your game on track and achieves course realism like you have never seen before.

*Source: QuestionPro Conjoint Analysis/Survey

Avid Golfer Insights



What we heard	What we validated
Avid Golfers are knowledgeable in tune with everything golf	76% of avid golfers with HHI \$100K+ have 0 golf simulator product knowledge
Golf Simulator resellers don't need to teach avid golfers about golf simulation, there is enough knowledge out there.	Only 24% of avid golfers with HHI \$100K+ have limited knowledge of golf launch monitors
Golfers interested in golf simulation are 45+ years old	45% of Avid Golfers with HHI \$100K+ fit into the 25-44 age group

Are you missing out on revenue from avid golfers and an opportunity to educate them?

*Source: QuestionPro Conjoint Analysis/Survey

Projector Upgrade Insights



What we heard	What we validated
Golf sim owners don't really see a need for 4K	Over 84% of golf simulator owners prefer 4K resolution for 16:9/16:10 impact screens.
Golf sim owners are not happy with the image quality of their projectors	More than 68% of golf sim owners have upgraded or considered upgrading their projector after their initial golf sim purchase.
Golfers without golf simulator product knowledge can't tell the difference between 1080p vs 4K	In a blind comparison test, 72% of Avid Golfers surveyed preferred BenQ's TK700STI 4K golf sim images vs Optoma's GT1080 Darbee 1080p.

Are you reaching out to Canadian Tire to pitch them on 4K Golf-In-A-Box?

*Source: QuestionPro Conjoint Analysis/Survey

Product Opportunity Targeting Golf Sim Owner with HHI \$100K+



Concept	Golf Simulator Preference	Total Investment (all components including projector)	Brightness (lumens)	Projector Resolution	Swing Analysis Camera	Projector Features / Function	Space Usage	Market Share
1	Sim-In-A-Box	\$10-30K	>4000	WUXGA	Yes	Maintenance Free	Movies + Golf Sim	23.81%
2	DIY	\$10-30K	4000-6000	TRUE 4K	No	Maintenance Free	Movies + Golf Sim	17.06%
3	Sim-In-A-Box	\$10-30K	4000-6000	TRUE 4K	No	Maintenance Free	Movies + Golf Sim	8.33%
4	Integrator	\$50K+	4000-6000	TRUE 4K	Yes	Brightness	golf simulator, family gaming, watch movies, watch tv	42.86%
5	Integrator	\$30-50K	4000-6000	TRUE 4K	Yes	High Resolution	golf simulator, family gaming, watch movies, watch tv	7.94%

*Source: QuestionPro Market Simulation Tool

Product Opportunity Targeting Avid Golfer Interested In Golf Sim



Concept	Golf Simulator Preference	Total Investment (all components including projector)	Brightness (lumens)	Projector Resolution	Swing Analysis Camera	Projector Features / Function	Space Usage	Market Share
1	Sim-In-A-Box	\$10-30K	>4000	TRUE 4K 16:9/16:10	Yes	Maintenance Free	Movies + Golf Sim	60%
2	DIY	\$10-30K	4000-6000	TRUE 4K 16:9/16:10	Yes	High Resolution	Movies + Golf Sim	0%
3	Sim-In-A-Box	\$10-30K	>4000	XGA 4:3	Yes	Brightness	Movies + Golf Sim	16%
4	Sim-In-A-Box	\$10-30K	<6000	TRUE 4K 16:9/16:10	Yes	High Resolution	golf simulator, family gaming, watch movies, watch tv	4%
5	Integrator	\$30-50K	4000-6000	TRUE 4K 16:9/16:10	Yes	Brightness	golf simulation only	20%

*Source: QuestionPro Market Simulation Tool

Product Opportunity Targeting Female Golf Sim Owners



Concept	Golf Simulator Preference	Total Investment (all components including projector)	Brightness (lumens)	Projector Resolution	Swing Analysis Camera	Projector Features / Function	Space Usage	Market Share
1	Sim-In-A-Box	\$10-30K	>4000	WUXGA	Yes	Maintenance Free	Movies + Golf Sim	14.58%
2	DIY	\$10-30K	4000-6000	TRUE 4K	No	Maintenance Free	Movies + Golf Sim	10.42%
3	Sim-In-A-Box	\$10-30K	4000-6000	TRUE 4K	No	Maintenance Free	Movies + Golf Sim	14.58%
4	Sim-In-A-Box	\$10-30K	4000-6000	TRUE 4K	Yes	High Resolution	golf simulator, family gaming, watch movies, watch tv	1.04%
5	Integrator	\$10-30K	< 6000	TRUE 4K	Yes	Brightness	golf simulator, family gaming, watch movies, watch tv	59.38%

*Source: QuestionPro Market Simulation Tool



How can we help

- Give you the tools to win more customers and unlock new revenue streams
- Provide Avid Golfers and Golf Sim Owner market intelligence
- Increase knowledge of Avid Golfers and Golf Sim Owners with subject matter expert articles
- Drive traffic and knowledgeable customers to your site through online branded content



Because it matters