



The future of golf footwear and gloves could depend upon the weather getting better. For months, rain and floods and excessive temperatures in the USA and Britain have severely disrupted playing patterns, coming at a time when the average number of rounds being played in the USA was already falling. The Tiger Woods phenomenon may be boosting TV audience figures but the game needs even more new players to maintain the double digit industry growth of the 1990s.

The handicap of high expectation

The new century has been uncomfortable for the golf industry in the world. In the eighties and nineties this was a sport that could do no wrong. Its popularity grew in leaps and bounds. It was the recreational activity for soccer and football stars around the world. Pop stars and TV celebrities in the UK were enthusiasts and promoters of the sport. To succeed in business it was a prerequisite and the passion with which business executives took to the sport was quite beyond the imagination.

There was an unprecedented wave of course building and, although some of the more ostentatious crashed spectacularly with the recession in the early 1990s, nothing seemed likely to stop the continued double digit annual growth in the sport world wide.

The golfers demand for innovation and novelty was pandered to by an endless rush of new offerings as space age technologies - carbon fibres, graphite and titanium - spread through clubs, balls, even into shoes and gloves.

The big sports brands joined and fuelled this enthusiasm as they saw their white trainer footwear market offer decreasing opportunities for growth. Nike, Reebok and Adidas had all flirted with golf with limited success. As the nineties progressed they began to get serious.

Having noted all this, the casual observer will then add the dramatic arrival, at the eleventh hour of the 20th century, of a name that carried golf into every sitting room in the world - Tiger Woods. As seemingly the whole world watched him win his first US Masters on TV, no one could doubt that involvement in golf would be profitable and successful for all, for many years to come.

More new viewers but...

But the reality that began to emerge in 1999 and 2000 was not so rosy. Tiger Woods did boost tournament attendances and TV audiences but not new players. The real story of the nineties was the sport's failure to attract new players. The game of golf remained too expensive, too

difficult, and too time consuming. The young, the female, and the less well off were not encouraged to get involved in a serious way. The numbers of golfers remained stubbornly stagnant. It was as if the game couldn't get out of the sand trap.

As 2000 began, growth was down to nearer 2% per annum, if there was measurable growth at all. The market was abruptly demonstrating its maturity and with it the loss of weaker brands and the consolidation of the brand leaders. Golf is a game which is known to weather recessions well, as redundant employees take to the course to fill time. Consumables such as balls, shoes and gloves continue to do well and, although sets of clubs suffer, individual items - a special putter, wedge or driver - is still an obvious "small indulgence" for a special occasion.

What golf cannot respond to is the weather itself and 2000 and the first quarter of 2001 has had such bad weather that golf rounds world wide have plummeted the sport into negative territory. Snow, rain, floods and dangerously high temperatures have all scuppered the game's desperate attempt to regain momentum.

In such a competitive market where the big brands Nike, Acushnet (owner of Cobra, Titleist and FootJoy), Callaway, Spalding/Etonic and Mizuno are desperately fighting for market share margins have narrowed and volumes declined.

Money for sponsorship but less for innovation

This is not the only pressure on the sport. In the autumn of 2000, Nike re-signed Tiger Woods for the next five years for \$100m, and shortly after agreed to pay David Duval \$28 million over the four years.

These are unprecedented numbers for a sport where in 1980 many players were happy just to accept being given free equipment. With 150 players lining up in each of the Tours tournaments each weekend there is a limit to what can be afforded. Although a giant in golf,



Spalding/Etonic shoe

Acushnet only has annual sales just under a \$1 billion, and Callaway a little behind. So there have been three consequences. Sponsorship money has quickly concentrated into the hands of the prominent few on the Tour and the rest have been left to survive on comparatively small pickings and prize money. Non-golf sponsors like Buick automobiles and the big accountancy and business consultancy houses have entered the arena, and the golf companies have chosen to find the money by making cuts elsewhere. Nike is smiling here as they can amortise Tiger Wood's costs across their whole business. He is one of few sportsmen whose halo can transcend the sport, and who demonstrably can sell product.

This leaves the big companies in a dilemma. In a sport driven by innovation, and where that innovation drives differentiation and so avoids commoditisation, the money for development is drying up. The retail price of sporting goods has been falling over the last three years and, given the slowdown in the US economy, the chances of persuading the consumer to pay more are slim.

Shoes and gloves and leather

A key component in this equation is leather which provides the most costly component in the majority of shoes and gloves. Raw material has been on a steady rise over the last year and the recent issues of BSE and Foot and Mouth disease have created something like a panic in the industry. Industry buyers who were resisting price increases from tanners are now panicking about supply. The outcome is likely to be that innovation will take a back seat in the fight for margin and security of supply for at least the next two years.

For golf footwear there were two major developments in the nineties. The one the industry was working steadily towards was the waterproof shoe. This became a standard during the decade and is now a threshold requirement of any reasonable golf shoe. Membranes from Gore-Tex and Sympatex led the introduction of the guaranteed waterproof shoe, and Gore-Tex still features in the big brands like Nike. FootJoy found a way to make an all leather upper waterproof with seam sealing for some of their top shoes and uses a simple membrane in their lower priced footwear. The non-membrane systems offer the shoemaker significant cost savings and should be more comfortable for the wearer.

Soft spikes, the unexpected change

The unexpected change of the nineties was a rapid move away from the traditional metal spike. The arrival of "soft spikes" or cleats was viewed very skeptically and few industry insiders thought that a conservative sport would accept such a radical change but, very quickly, course after course around the world has banned conventional spikes preferring to have their greens (and club house floors) less damaged and more fun to play on at the end of the day. Even if their home course allows spikes, vacationing golfers who come back have rarely replaced their metal spikes. This had led to a battle of plastic spike design and locking

systems for the spikes - which wear out much faster than conventional spikes. MacNeill Engineering and Trisport are the main makers with such products as Q-Lok and Black Widows. This change has also led to a revolution in outsole design, so that almost every golf advertisement now includes a picture of the sole. This has also meant the demise of the leather sole, which is rarely to be found in golf footwear nowadays.

Since then, footwear has been involved in the search for the next big thing. FootJoy has pushed the comfort aspect with its Intellishield temperature responsive membranes and with the Drylce shoe, with Comfortemp and Hydrocool to manage temperature and humidity. Their new category of Fit Dogs offers a

simple way of making the fit; Hi-Tec has followed the same path with its Regulator using Outlast technology. This has only had limited success with consumers who felt that they have always been paying for comfort and it should not be an added extra. Nike moved towards athletic styling crossing over from its trainer knowledge and experience. This approach also had limited success, perhaps because Nike was not yet an accepted golf footwear brand. Now that the company is established, especially through its Tiger Woods' sponsorship, and has wide distribution it can be expected to reinvigorate this approach.

Gloves have been short of fundamental innovation since the adoption of the Velcro® closure in the 1970s. Development is restricted by Golf Rule 14-3 which bans the use of "artificial devices or unusual equipment". As a concession "plain gloves may be worn", but anything that smacks of attaching to the club, being padded, or restricting the wrist movement is likely to be promptly banned. The nineties have highlighted some costly contraventions by Japanese makers.

FootJoy has transformed the industry in the last two decades with the introduction of its two workhorses, the Sta-Sof and the Weather-Sof, but these have now been largely matched by competitors and are looking old. The Sta-Sof Alliance which mixed synthetic with leather and became a market leader in Europe looked likely to take over from Sta-Sof but appears to have been withdrawn. The synthetic element on the back helped with fit and allowed some distinctive colouring options.

During the nineties, this 'combination' category had become one of real focus and can be expected to increase considerably if leather prices keep moving up. The Etonic Difference, although again now showing its age, made big strides in the market and on Tour. While leather remains the preferred material for the better golfer, the PU coated synthetics offer better characteristics of colourfastness, and consistent stretch.

For the rest of the 1990s, the market was characterised by fragmentation, new leathers and new constructions. Most obvious have been the new constructions with offerings from Mizuno



FootJoy's new Fit Dogs with interchangeable heel cradles, a TPU outsole and Black Widow spikes (cleats) from Softspikes.

Tech Flex, Taylor Made React and FootJoy Spider and Weather-Sof GTX. These have all borrowed looks from other categories, such as baseball, and incorporated Lycra and other elasticated textiles to offer greater comfort - and visibility - at the knuckles.

Leather looked set for a good start to the new century in gloves as new ideas accelerated. Both Mizuno and FootJoy tested leather with graphite. Success was limited but this looked to have more to do with over-pricing rather unconventional gloves and failing to connect with the potentially interested consumer segment. Mizuno then went forward with a titanium leather, but again without great success.

PCMs in gloves and shoes

In their new DryIce gloves FootJoy has linked into its DryIce shoe technology with phase change materials (PCM) from Frisby. It is not clear how committed to this technology it is but with Pittards making PCM glove leather and Sadesa marketing a footwear leather it is likely to be more visible over the next few years. The basis is that the leather is impregnated with inert capsules that change from solid to liquid and vice versa at predetermined temperatures, absorbing heat or chill when doing so. Properly applied the net result should be that the hand or foot stays within a tighter and more comfortable temperature band. It is very difficult to get this material into leather, so as with footwear we should expect to see the competition using the fabrics and elastics containing Outlast.

Recent years have seen regular attempts to introduce kangaroo skins into the golf glove business. Up until this year some of the leather offered has tended to be poorly tanned and inconsistent but, at the January PGA Merchandise Show in Orlando, TaylorMade (now part of Adidas) introduced its Tour Preferred glove apparently made in kangaroo (the company calls it long fibre). Kangaroo is stronger than the hairsheep leather traditionally used in golf gloves and so can be offered at a naturally thinner thickness without fear of tearing.

Kangaroo set to jump in

If hairsheep supplies continue to get scarcer and prices rise, then we can expect further development of the kangaroo glove leather and should expect it to take a significant share of the leather used in golf gloves. The nature of the animal and the large number of skin defects means that only the better skins will work and this will push kangaroo towards the better end products.

Synthetic materials for golf gloves have not developed as much over the last decade as was promised and less innovation appears to be going on here than with leather. It is likely that leather supply issues will change this, especially if these also affect the larger synthetic markets of clothing and upholstery. There is also evidence that the larger Japanese companies have lost some of their flexibility and speed in innovation, and that the Taiwanese and Korean suppliers are more nimble, as well as much better priced.

Two types of synthetic are used in golf gloves -

a non-woven suede type popular in Japan and the PU coated knit material most used in the US and Europe. The non woven looks to be easier to modify and introduce smart materials, as the manufacturer does not need to worry about any bonding within the structure which is a major concern with the PU coated type. The non-woven is very durable, absorbs humidity and remains quite grippy in humid or rainy conditions and can normally be machine-washed. It carries the big disadvantage of having very little stretch and is difficult to make to fit correctly. Consequently its current popularity is limited to Asian markets and to niche gloves such as those used in the rain.

The synthetic material most commonly used is a PU coated knit normally nylon or polyester. The stretch characteristics are defined and repeatable, allowing the gloves to be easily made to fit in a way not possible with leather. The surface coatings now have a very natural touch but are not yet durable enough to withstand the abrasion from the club grip. Consequently a small leather patch is still to be found in the palm area. This is likely to be an early focus for improvement. The need to maintain a very strong bond between the PU and the fabric below has restricted the maker's enthusiasm for the risks involved in innovation, but the signs are already there, even before the current worries of leather supply, that these makers are ready to move forward.

We can expect all the smart applications of moisture and temperature management that we are seeing in the textile industry to start to come through strongly, and a lot of work being done on surface coating to get the PU to grip better in damp conditions.

While both gloves and shoes are in a holding pattern of incremental change while the sport decides where to go, and the big brands fight it out for market share, there can be no doubt that golfers remain crazy for every technological boost to a highly mental game. Shoes and gloves will remain high activity categories where innovation will be the key to success.

But let's have some decent golfing weather in the mean time. 🌍



The Champ® Kangaroo Tour glove

Photo above and on opening page courtesy of Champ®

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