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The Last Word

The humble Darrell Survey is gospel to the golf industry

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Considering the role that cars have played in the 61-year history of the **Darrell Survey**, the Motor City would seem a more appropriate place for company headquarters than a spartan office next to a **Los Angeles** graveyard.

After all, when Eddie Darrell, the founder, was following the ragged ancestor of the **PGA Tour** to give **Titleist** the number of pros playing its ball, he worked out of the back of a 1940 Buick Estate Wagon. And when Darrell's widow, **Virginia**, took over the company, she filled out the weekly reports on which players were playing what equipment by the golden glow of the dome light in a 1974 Cadillac.

It wasn't until 1980, when the children of a **Titleist** sales representative, Susan Naylor and her brother, John Minkley, bought the **Darrell Survey** that the company had a firm foundation—one that couldn't be towed when the parking meter expired. Naylor opened the **L.A.** base, while Minkley manned a satellite office in **Atlanta**.

Still, on a recent day Naylor encountered a problem to which even Eddie Darrell could have related. Returning to the office from an **L.A.** bindery, she tried to stuff 24 boxes of the \$1.4 billion golf industry's most comprehensive consumer research into the backseat and half-full trunk of her husband's 1989 Cadillac, known eponymously as the Biffmobile.

"I just bought shocks for this thing six months ago," said Biff Naylor, shaking his head in resignation. After a 15-minute jam session, the Biffmobile, hindquarters sagging, scraped out of the parking lot. Susan, surrounded by cardboard boxes, had a wide grin on her face. "I knew we'd get it all in," she said.

Getting it all in—condensing reams of information—is what the **Darrell Survey** has been doing since 1934. The only company of its kind in golf, Darrell this season will post sentries on the 1st tees of 162 **PGA Tour**, Senior tour, **LPGA**, **Nike** tour and major amateur events. In the three minutes a threesome spends on the tee before the first shots are sent down the fairway, Susan Naylor, Minkley or one of a dozen other Darrell representatives will record in a loose-leaf notebook the brand of woods, irons, putter, ball, shafts, grips, shoes, bag and visor used by each player. By the end of the day every player in the field will have been so surveyed.

After being compiled in **Los Angeles**, the final count is sent to the survey's clients every Monday morning. All of the major equipment manufacturers subscribe to what Taylor Made president Chuck Yash calls "the J.D. Power of the golf business," and they pay between \$50 and \$400 per category for the service, depending on the categories they desire.

"The Darrell Survey is the authority," says **Gary Adams**, who popularized the metal wood and created the equipment manufacturing companies Taylor Made and Founders Club. "It really is the industry scoreboard. I believe that what the best players play is what everybody else wants to play. I think the pyramid approach has become the standard way to market golf. The Tour is at the top of the pyramid, and winning the Tour count is the way to the top of this business."

What is remarkable about the **Darrell Survey**, given its influence in the golf industry, is that it relies almost entirely on part-time help.

"We really don't do this any differently than Eddie did way back then," says Naylor as she rummages through an old file cabinet full of surveys—and the carbon paper used to copy them—from the 1970s. Naylor unfolds a piece of legal-sized paper that has a weekly calendar for 1996 on it.

In black ink she has written in tiny letters the names of the tournaments the **Darrell Survey** will staff, along with the number of surveyors required to do each event. Minkley worked close to 50 of those tournaments last year. Naylor went to about 20. Part-timers—Tour wives such as Patti Inman, Carol Rymer and others—fill in most of the gaps.

At every tournament except the Masters, a Darrell representative has access to the 1st tee during the first round. As each player gets ready to start, a surveyor looks into his or her bag and quickly writes down the brands of the various pieces of equipment. Crucial to the entire deal is the confidentiality agreement all **Darrell Survey** customers must sign. Manufacturers can use Darrell's numbers (for example, 18 players used a particular driver) but are strictly forbidden from releasing the names of players and the equipment they use (i.e., **Paul Azinger** used a certain driver).

On that same day an early, unofficial draft of the report is faxed to clients. The loose-leaf pages are then sent back to **Los Angeles**, where the data are tabulated. Over the weekend the totals are confirmed and put into official report form. "We're almost archaic in our method, but it is simplicity in motion," Minkley says. At the Masters, where no one, not even the **Darrell Survey**, is allowed inside the ropes, Naylor and Minkley use a calorie-burning system of relays between the practice range, putting green and 1st hole, as well as powerful binoculars, to complete the survey. The goal is to be as unobtrusive as possible.

Virginia Darrell handled the books for her husband until his death in 1972, then took his place on the road. In 1974 Naylor, freshly armed with a degree in philosophy, art and religion from **San Diego State**, joined the traveling circus, which by then included three dogs. " **Virginia** was the Tour grandmother," recalls Naylor. "Starling with the **California** swing in January, we stayed on the road for nine months straight. **Virginia** didn't drink much, but she kept this little bar in the backseat for consoling rabbits who had missed another cut." Naylor says that **Virginia** was privy to every secret on Tour but went to her grave in 1989 without ever talking out of school.

Virginia sold the company only when she grew tired of the travel. Naylor and Minkley have kept alive the spirit of what was and still is a mom-and-pop operation, and they have prospered as golf has blossomed.

Adams has used Naylor's numbers to build both of his companies. In 1978 he had a good idea, the metal wood, but no cash. A year later, with \$30,000 in seed money, he formed Taylor Made and produced a few hundred clubs. What he needed was representation on Tour. In the early '80s more professionals began using individual woods instead of sets, and **Adams** started to get his clubs into the hands of Tour players. Copies of the weekly **Darrell Survey**, which identified this trend, were the basis of Taylor Made's first national advertising campaigns.

By the time **Adams** sold his company to ski conglomerate Salomon in 1984, Taylor Made had established a toehold with the players, and by 1987 it could cite survey numbers to prove that 37% of Tour pros were using Taylor Made drivers.

But perhaps the most far-reaching—and most subtle—influence of the survey is felt at the end of each season. The Tour is understandably picky about which equipment companies are allowed to freely roam the practice ranges, putting greens and locker rooms at tournament sites. Only manufacturers that are mentioned at least once in a particular season's **Darrell Survey** are given access to the players the following year.

You can't win if you aren't in the game.

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