

SPORTS MARKETING SURVEYS INC.

2019 BGIA Executive Dashboard...

SPORTS MARKETING SURVEYS INC. GB ROUNDS PLAYED TOPLINE

1st Quarter 2019



INTRODUCTION

BACKGROUND & OBJECTIVES

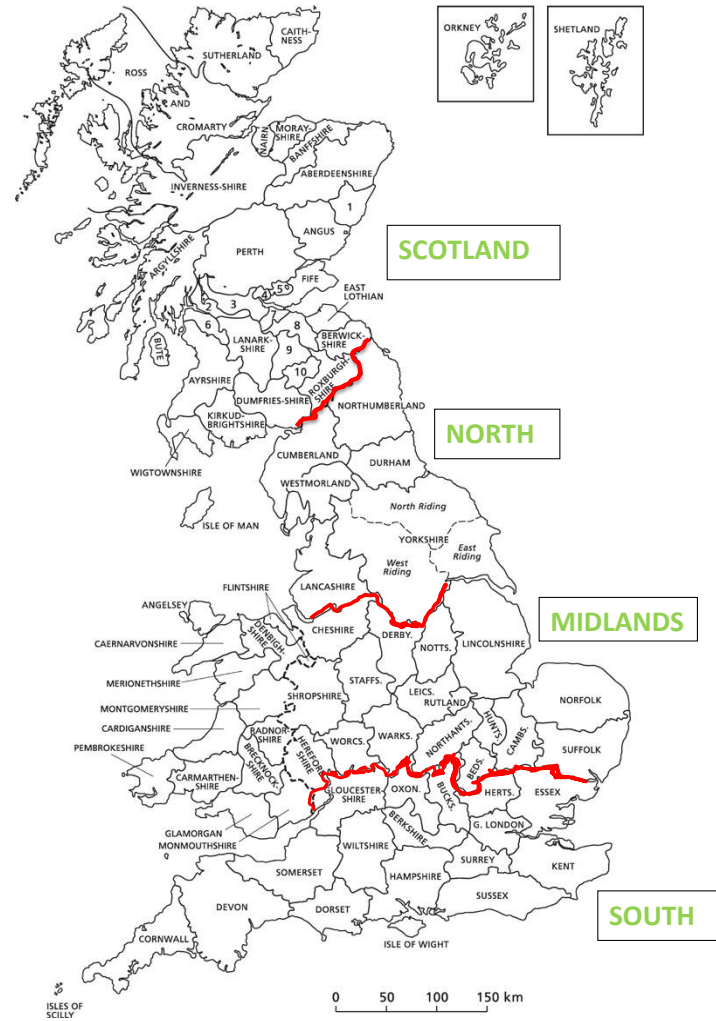
- The Rounds Played research started in 2000 and has monitored the number of rounds of golf played in Great Britain on a quarterly basis ever since.
- This report monitors the rounds played at public access golf courses throughout mainland Great Britain.
- This report covers:
 - Average number of rounds played per month during the 1st quarter of the year – 2015 to 2019.
 - Percentage comparisons for the 1st quarter of the year – 2015 to 2019.
 - Regional comparisons for each period.
 - Percentage comparisons month by month.
 - Weather graphs
- N.B: Although only 2015 to 2019 data is shown in this report, historic data is available. Please contact us for details.

INTRODUCTION

METHODOLOGY

- Emails were sent, and telephone calls made, to public access golf courses and local councils to gather their rounds played recorded performance.
- Follow up calls and emails were made to those clubs and/or councils that had not responded, in order to collect all the data.
- The information contained in this report is collected from a sample of circa 200 courses throughout Great Britain.
- Comparisons can be made between the percentage change and the average number of rounds per month. The actual number of rounds played cannot be directly compared between the different quarters due to the different sample number of golf courses used in each quarter.
- When calculating the overall national figures, the regional figures have been weighted to reflect the total number of courses in each region in order to more accurately reflect the pattern in the whole of Great Britain.

MAP OF REGIONS



The above map provides a definition of the regions used in this report

INTRODUCTION

CONTRIBUTING FACTORS

- The UK weather pattern for 1st Quarter enabled golf to be played frequently.
- January started dry and settled but mostly cloudy, and it remained generally dry and often mild during the first half of the month. It became progressively less settled as the high pressure moved further away to the south-west. The second half was mostly cold and changeable with frequent north-westerly winds and some sleet and snow at times, but rainfall amounts in many areas were small.
 - Overall it was the driest January since 2006.
- February began cold with some persistent snow in the south and snow showers in the north-east, but from the 5th onwards it was generally mild. It was unsettled until the 10th and to a lesser extent between the 16th and 20th, but very mild and sunny weather developed widely between the 13th and 15th and again between the 21st and 27th, with record-breaking daytime temperatures. Overnight frost & fog was also quite widely present at times.
 - The mean maximum temperature for the UK was the highest for February in a series from 1910
 - It was the UK's second sunniest February in a series from 1929, and the sunniest in the series for England. In contrast sunshine was below normal in north-west Scotland.
- Until the 17th, March's weather was dominated by westerly and north-westerly winds and frequent rain belts, interspersed with brighter showery weather. Storms Freya and Gareth brought spells of particularly wet and windy weather for much of the country. It was mostly mild in the south but from the Midlands northwards it was occasionally cold enough for sleet and snow. From the 18th onwards it turned generally mild and settled. The last week was much sunnier for most parts of the country, and especially sunny over much of England.
- Other sporting events that may have affected rounds played include:
 - 6 nations Rugby

For a more detailed analysis of the weather please see Appendices

Note: Weather information taken from <http://www.metoffice.gov.uk/>

NATIONAL SUMMARY



AVERAGE PERCENTAGE CHANGE PER REGION

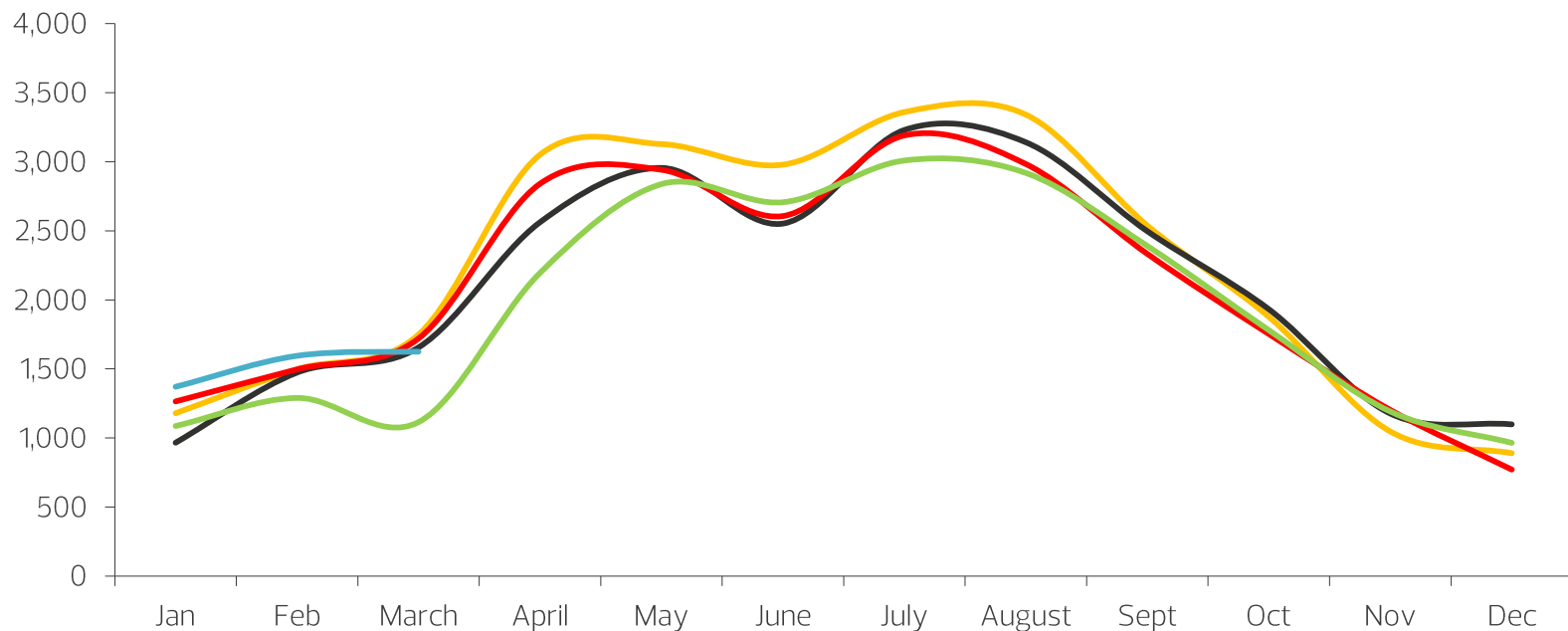
1st Quarter 2019 vs. 2018

■ Scotland:	Up	29.0%
■ North:	Up	43.0%
■ Midlands:	Up	28.5%
■ South:	Up	31.7%
<hr/>		
■ National:	Up	31.5%

ROUNDS PLAYED YEAR TO DATE – NATIONAL

Average number of Rounds Played per course
in each month ~ 2015- 2019

— 2015 — 2016 — 2017 — 2018 — 2019

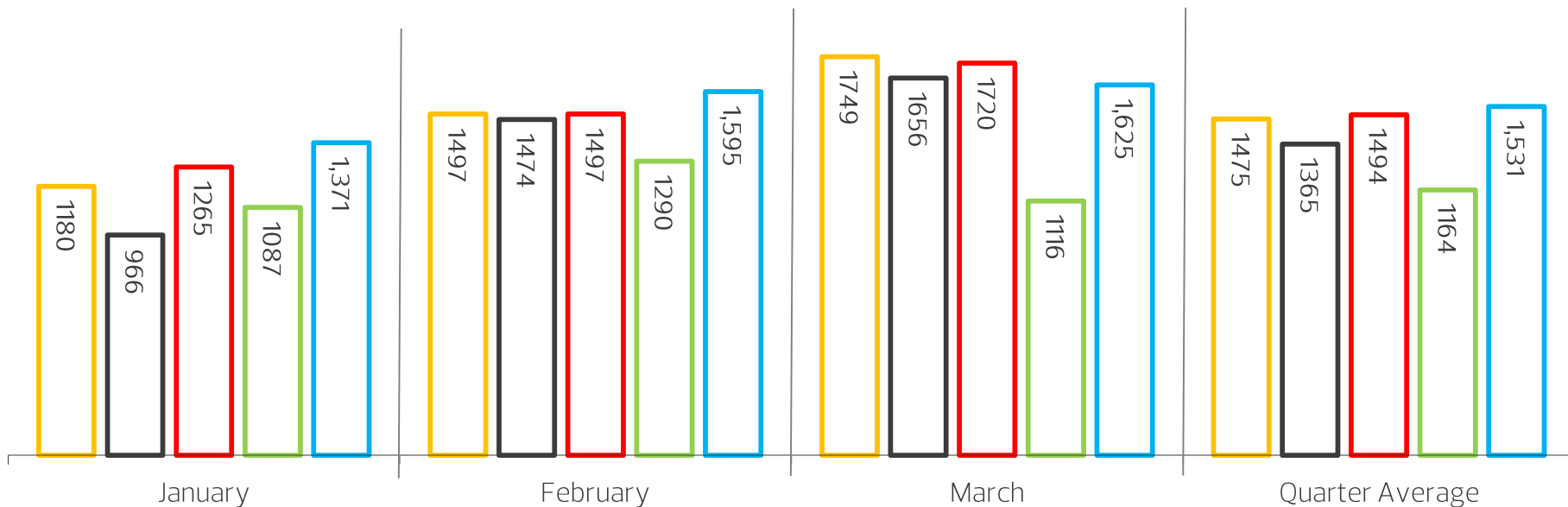


January saw a healthy year on year growth of 26% and February 24% .
 March enjoyed a 46% growth.
 The quarter ended 32% up when compared to 1st quarter 2018.

ROUNDS PLAYED 2019 – National

Average number of Rounds Played per course
in 1st Quarter ~ 2015 – 2019

2015 2016 2017 2018 2019



Movement vs. 2018

January	Up	26.1%
February	Up	23.6%
March	Up	45.6%
Quarter Average	Up	31.5%

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INVESTIGATION

INSIGHT

ACTION

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