

SPORTS MARKETING SURVEYS INC.

2019 BGIA Executive Dashboard...

SPORTS MARKETING SURVEYS INC. GB ROUNDS PLAYED TOPLINE

2nd 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 2nd quarter of the year – 2015 to 2019.
 - Percentage comparisons for the 2nd 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.

INTRODUCTION

CONTRIBUTING FACTORS

- April started off cool with showers and longer spells of rain, bringing sleet and snow to some places. Between the 5th and 9th it turned generally warmer. It turned colder with widespread overnight frosts between the 10th and 16th, though often dry and sunny. The weather turned settled and very warm with plenty of sunshine for most areas between the 17th and 23rd, producing a new record high temperature for Easter Sunday. It turned more unsettled during the last week with strong winds on the 26th and 27th associated with Storm Hannah.
 - Sunshine was mostly above normal, except in south-western England, with 114% of average.
- May began rather cloudy and showery in most areas. On the 3rd/4th there were widespread frosts, and wintry showers in some northern and eastern regions. Cloudy and unsettled weather persisted until the 9th, but then it became generally warm, dry and sunny. The weather remained fairly quiet until the 24th, but generally cooler, with some rain or showers. It turned changeable from the 25th onwards but the last two days were very warm in the south and east.
 - Rainfall was 93% of average overall, and it was a dry month in Wales and southern England, but there was more than twice the normal rainfall in parts of north-east Scotland.
- June started warm, dry & sunny in much of the south, but rainy further north. It turned unseasonably cool, and wet in places, e.g. Lincolnshire, between the 10th and 13th. Thunderstorms affected the south-east on 18th/19th. The last third of the month was often warm and humid, with further rain at times and some thundery outbreaks especially in the north. The 29th was a very hot day in many areas with temperatures as high as 34 ° C in the London area.
 - Rainfall was 152% of average.
 - Mean temperatures and sunshine were close to the average
- Other influencing factors:
 - Easter was 22nd April. In 2018 it was April 1st.
 - USPGA was moved from September to May

NATIONAL SUMMARY



AVERAGE PERCENTAGE CHANGE PER REGION

2nd Quarter 2019 vs. 2018

■ Scotland:	Up	4.1%
■ North:	Down	7.3%
■ Midlands:	Up	2.1%
■ South:	Up	3.7%
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■ National:	Up	1.6%

AVERAGE PERCENTAGE CHANGE PER REGION

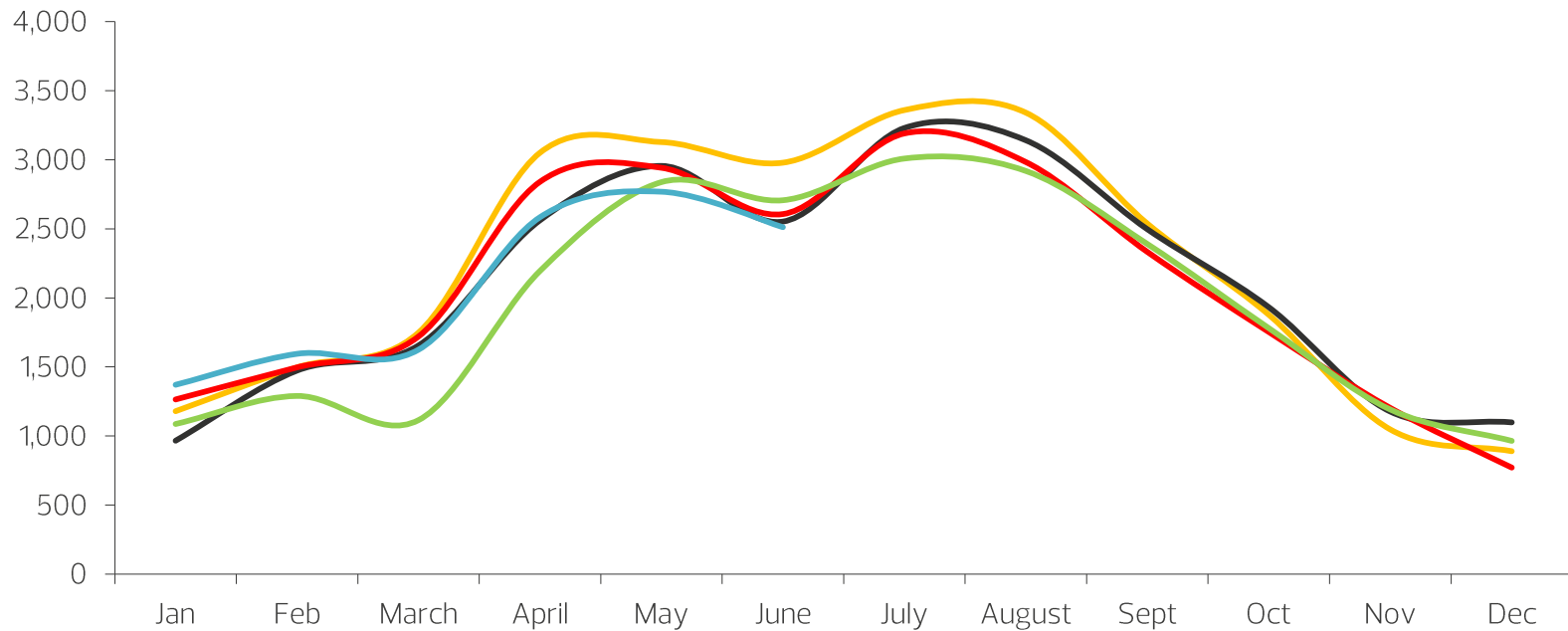
Half year 2019 vs. 2018

■ Scotland:	Up	13.5%
■ North:	Up	5.8%
■ Midlands:	Up	9.8%
■ South:	Up	12.5%
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■ National:	Up	10.9%

ROUNDS PLAYED YEAR TO DATE – NATIONAL

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

— 2015 — 2016 — 2017 — 2018 — 2019

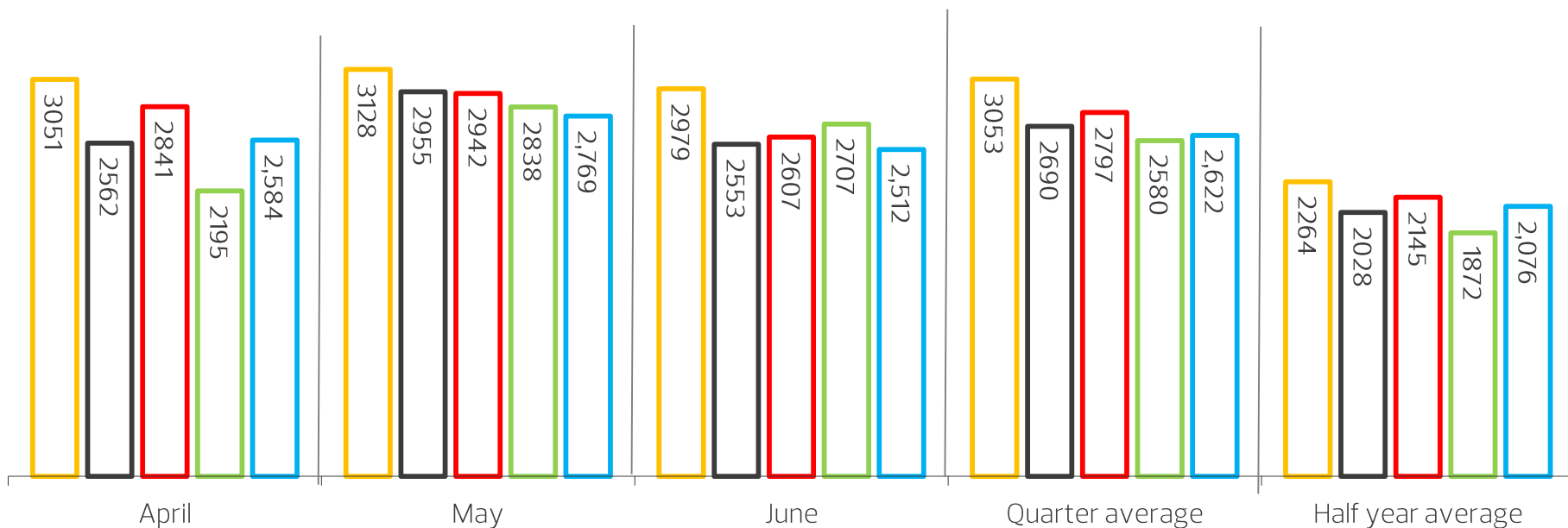


April saw a strong year on year growth of 18%.
 However, May was 3% down year on year and June 7% down.
 The quarter ended with a small growth of 2% when compared to 2nd quarter 2018.
 The half year average rounds of golf played is 11% up on half year 2018.

ROUNDS PLAYED 2019 – National

Average number of Rounds Played per course
in 2nd Quarter ~ 2015 – 2019

2015 2016 2017 2018 2019



Movement vs. 2018

April	Up	17.9%
May	Down	2.8%
June	Down	7.4%

Quarter average	Up	1.6%
Half year average	Up	10.9%

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 - The time period and measure should be clearly indicated
 - SPORTS MARKETING SURVEYS INC. should be credited as the source of the information.
- If you have any questions regarding these guidelines, or the appropriate uses of our data, please feel free to call.

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INVESTIGATION

INSIGHT

ACTION

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