

SPORTS MARKETING SURVEYS INC.

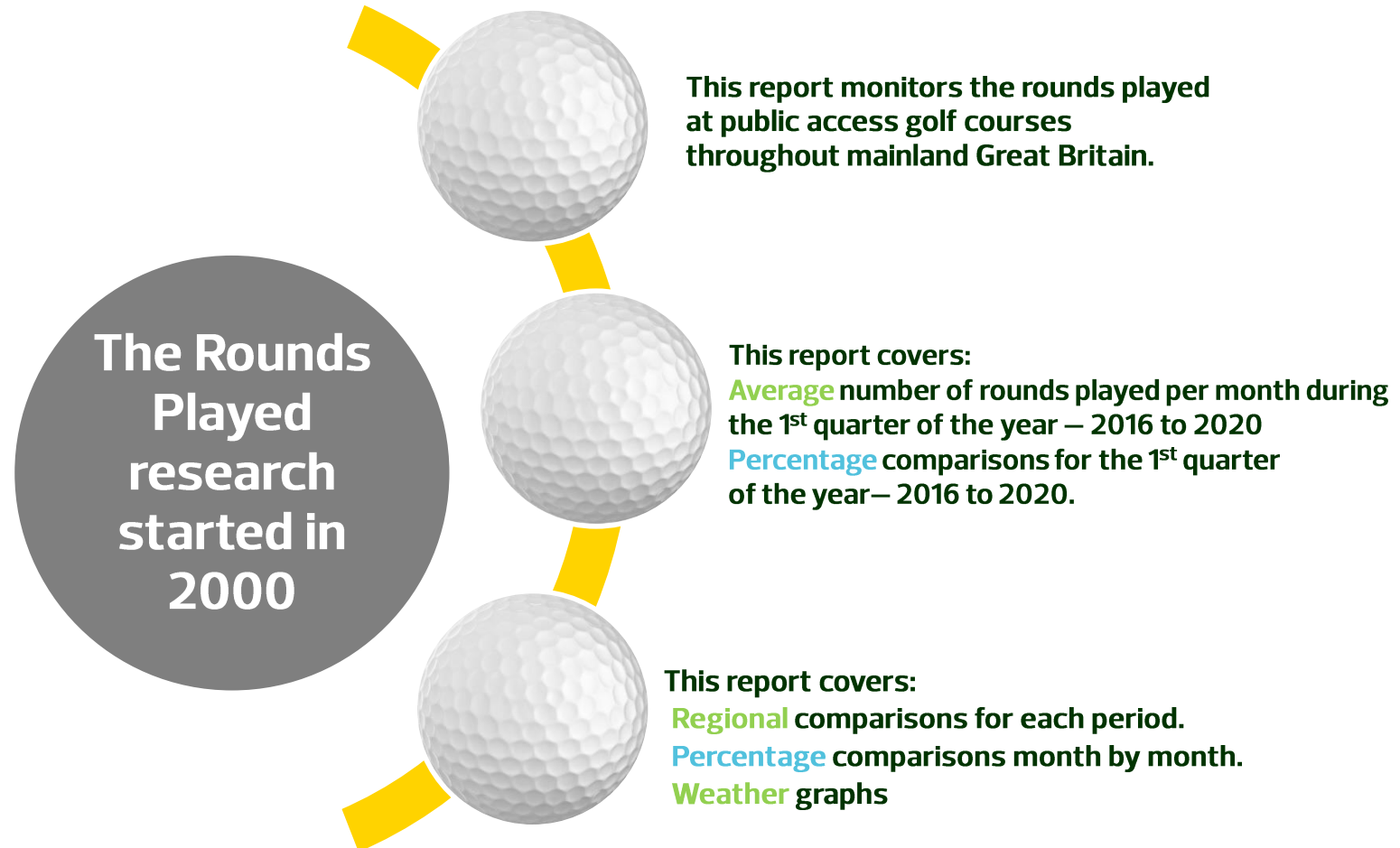
2020 BGIA Executive Dashboard...

SPORTS MARKETING SURVEYS INC. GB ROUNDS PLAYED TOPLINE

1st Quarter 2020



BACKGROUND and SCOPE OF THE REPORT



N.B: Although only 2016 to 2020 data is shown in this report, historic data is available. Please contact us for details.

METHODOLOGY

Emails were sent, and telephone calls made, to public access golf courses and local councils to gather their rounds played recorded performance.

The information contained in this report is collected from a sample of circa 200 courses throughout Great Britain.

Follow up calls and emails were made to those clubs and/or councils that had not responded, in order to collect all the data.

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.

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.

INTRODUCTION

CONTRIBUTING FACTORS

- At the start of January southern parts of the UK, had settled but generally cloudy weather. From the 7th to 17th the weather was mild, unsettled and also very windy at times. From the 18th to 25th, there was plenty of sunshine but by the 22nd most places were overcast. Wet and windy weather returned from the 26th, and there was snow in some areas on the 27th and 28th. Very mild air returned on the last three days of the month.
 - It was the 6th warmest January in a series from 1884.
 - Overall rainfall was average.
- February opened with four days of changeable weather, then between the 5th and 7th settled weather with sunshine and frosty nights came to many central and southern counties. The rest of the month was windy and exceptionally wet. Storm Ciara on the 9th and Dennis on the 15th brought exceptional rainfall totals to much of the country, and it was also very wet on the 28th with Storm Jorge. In between the rain belts, there were brighter spells and blustery showers which were wintry at times, especially in the north.
 - It was the wettest February in a series from 1862, with 237% of average, and some locations had over 400% of the long-term average rainfall.
- March began with sunshine and showers and occasional longer spells of rain, with sleet and snow on high ground. It was generally milder and more unsettled from the 7th to 15th, with belts of rain crossing the country at regular intervals, interspersed with brighter showery weather. A spell of dry sunny weather followed for most of the country, with much of England, Wales and southern Scotland having plenty of sunshine from the 22nd to 27th inclusive, with warm days and cold nights.
 - It was a generally dry sunny month overall, with 82% of average rainfall and 134% of average sunshine.
- Due to the corona virus all courses were closed by 23rd March 2020.

AVERAGE PERCENTAGE CHANGE PER REGION

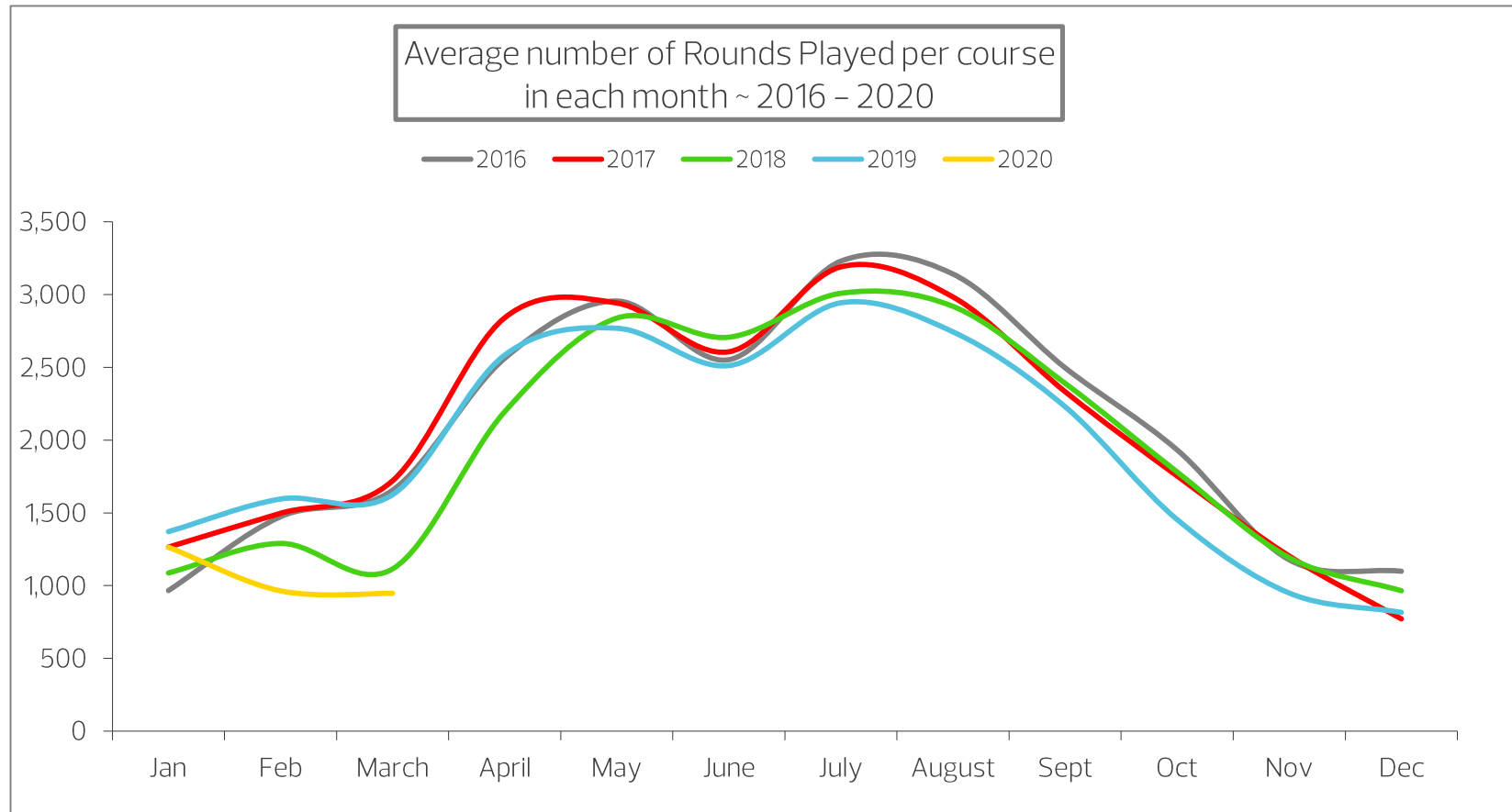
1st Quarter 2020 vs. 2019

■ Scotland:	Down	23.9%
■ North:	Down	34.5%
■ Midlands:	Down	32.7%
■ South:	Down	32.0%
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■ National:	Down	30.8%

NATIONAL SUMMARY



ROUNDS PLAYED YEAR TO DATE – NATIONAL

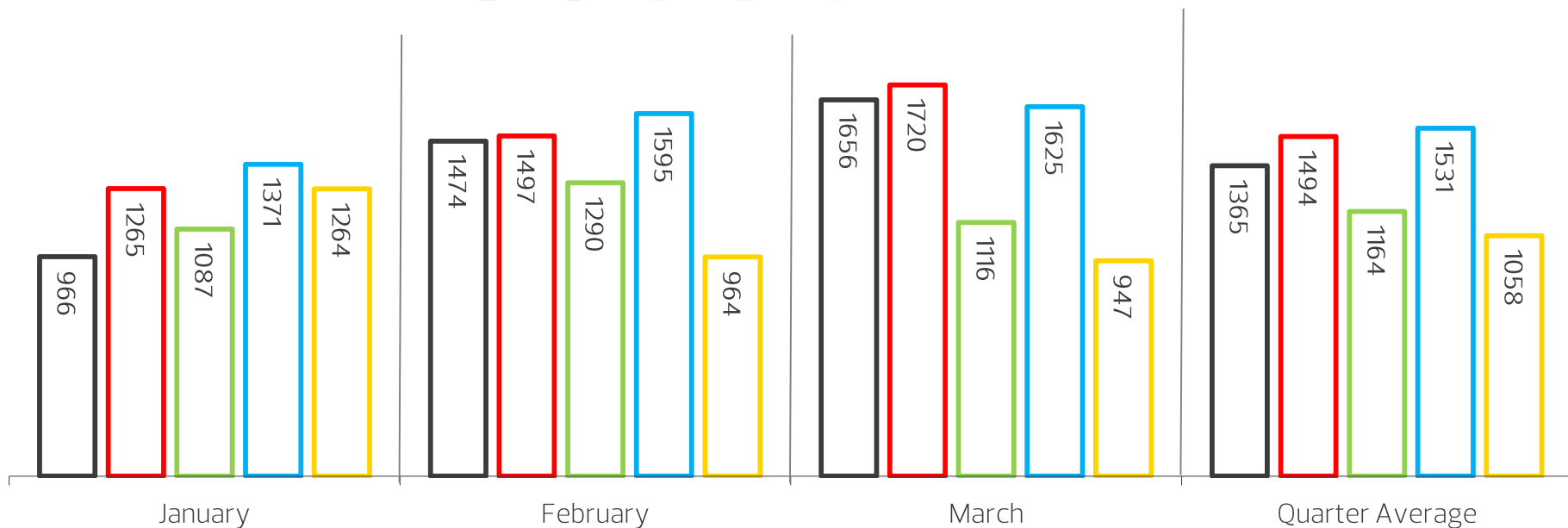


January saw a small year on year decrease of 8%.
 February suffered a decrease of 40% when compared to 1st quarter 2019.
 In March golf courses were closed on or around 23rd March resulting in a 42% year on year decrease.
 The quarter ended 31% down when compared with the same period in 2019.

ROUNDS PLAYED 2020 – National

Average number of Rounds Played per course
in 1st Quarter ~ 2016 – 2020

2016 2017 2018 2019 2020



Movement vs. 2019

January	Down 7.8%
February	Down 39.6%
March	Down 41.7%
Quarter average	Down 30.8%

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INVESTIGATION

INSIGHT

ACTION

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