

**SPORTS MARKETING SURVEYS INC.**

**2020 BGIA Executive Dashboard...**

**SPORTS MARKETING SURVEYS GB ROUNDS PLAYED TOPLINE**

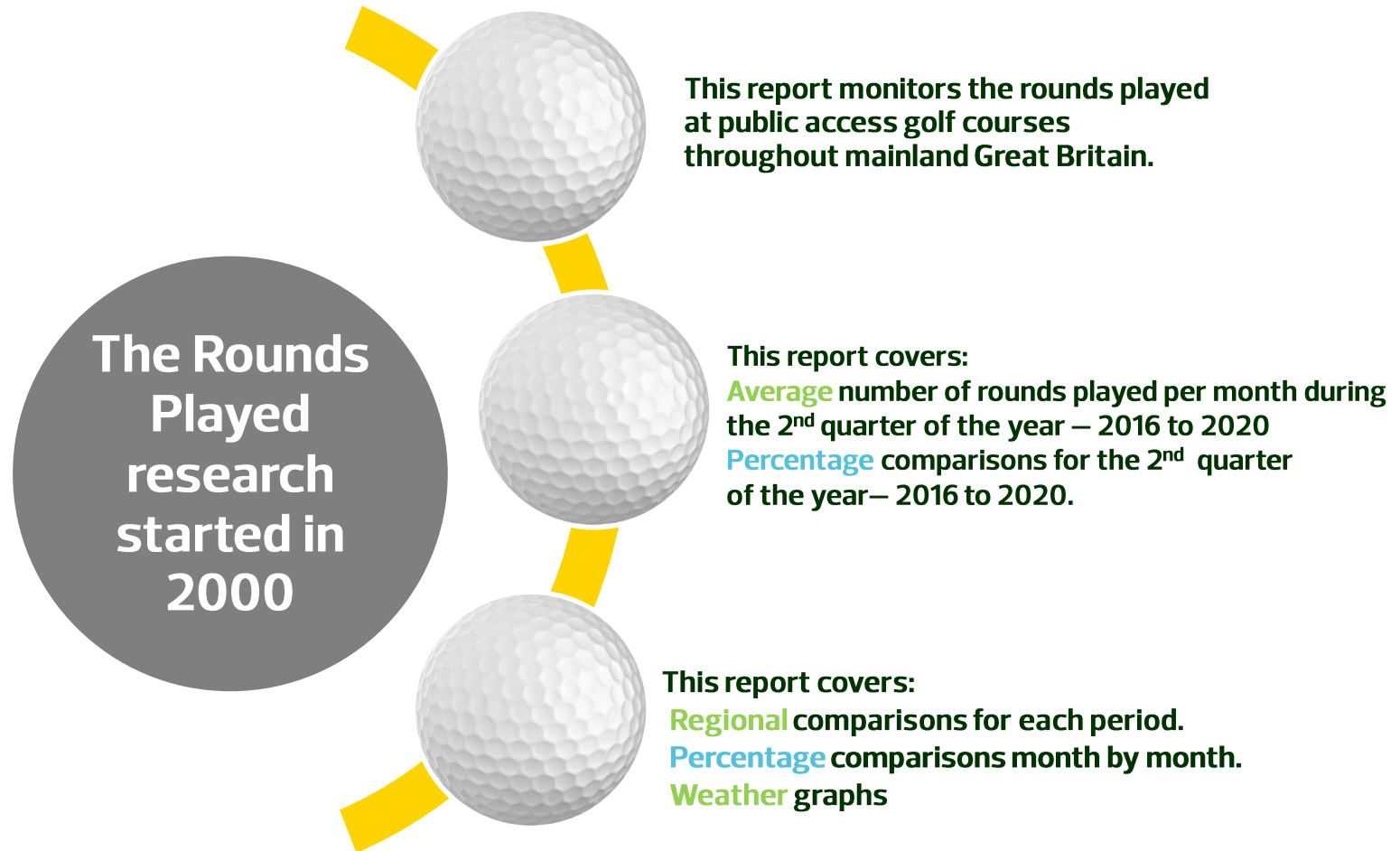
2<sup>nd</sup> Quarter 2020



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## 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

- Much of April was fine and settled. Plenty of sunshine generally allowed daytime temperatures to rise well above normal on numerous days. Rainfall was well below normal quite widely with only central southern counties of England having near average rainfall.
  - It was the sunniest April since 1929.
  - Overall rainfall was 40% of average.
  
- May began with cool showery weather which became more settled between 2<sup>nd</sup> and 4<sup>th</sup>. There was plenty of warm sunny weather between 5<sup>th</sup> and 9<sup>th</sup>, but showers broke out in places from 7<sup>th</sup> onwards. Northerly winds brought a cold snap from 10<sup>th</sup> – 15<sup>th</sup>. There was a more changeable spell from 16<sup>th</sup> – 23<sup>rd</sup> but with plenty of warm sunshine at times in the South. High pressure dominated from the 24<sup>th</sup> bringing generally dry, sunny and warm weather.
  - It was the sunniest May since 1929
  - Average rainfall was 47% of average.
  
- June began dry & sunny but by 10<sup>th</sup> it turned wet almost everywhere. Around mid-month there was a spell of warm, humid, showery weather with thunderstorms especially in central, western and southern areas. There was a hot sunny spell from 23<sup>rd</sup> – 25<sup>th</sup> which triggered a thundery breakdown in places. The last few days were cloudy and windy with showers and longer periods of rain.
  - Sunshine was 97% of average
  - Rainfall was 144% of average.

## INTRODUCTION

### CONTRIBUTING FACTORS continued

- All courses were closed throughout April, Due to the covid-19 virus.
  
- In May golf resumed :
  - 13<sup>th</sup> England.
  - 18<sup>th</sup> Wales.
  - 28<sup>th</sup> Scotland.
    - Members had to book tee times.
    - Only two balls were allowed.
    - The gap between tee times was increased.
    - Most Private members clubs did not allow guests or visitors.
  
- In June 4 balls were allowed again but tee times still had to be booked by members to ensure social distancing requirements were met.
  - Members guests and visitors were accepted but not at all clubs.
  - Hotels and resorts opened from
    - 4<sup>th</sup> July in England
    - 6<sup>th</sup> July in Wales.
    - 15<sup>th</sup> July in Scotland

## AVERAGE PERCENTAGE CHANGE PER REGION

### 2<sup>nd</sup> Quarter 2020 vs. 2019

■ Scotland:	Down 67.1%
■ North:	Down 24.5%
■ Midlands:	Down 19.0%
■ South:	Down 6.9%
<hr/>	
■ National:	Down 22.9%



## AVERAGE PERCENTAGE CHANGE PER REGION

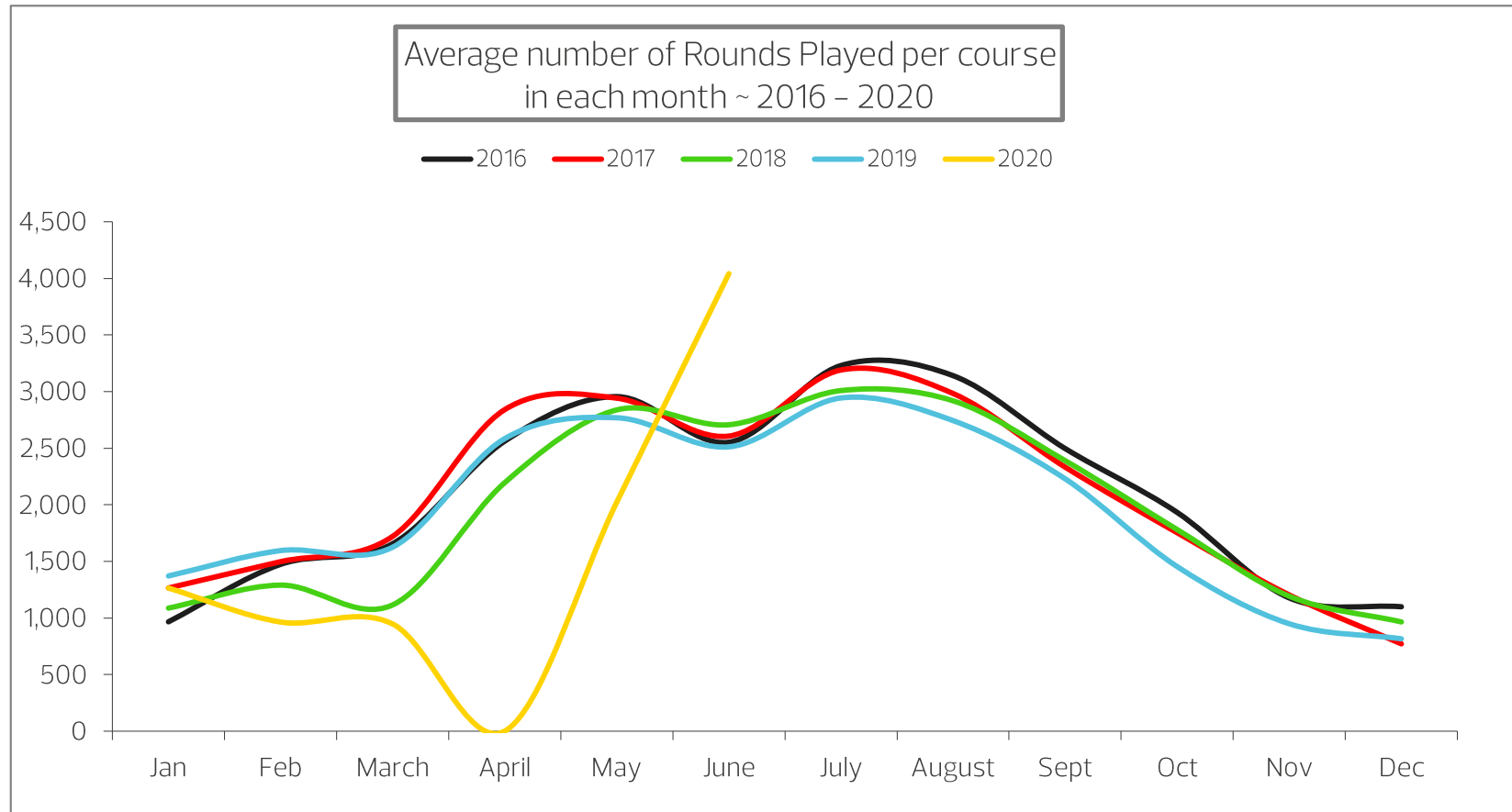
### Half year 2020 vs. 2019

■ Scotland:	Down 48.6%
■ North:	Down 28.0%
■ Midlands:	Down 23.7%
■ South:	Down 16.1%
<hr/>	
■ National:	Down 25.8%

# NATIONAL SUMMARY



## ROUNDS PLAYED YEAR TO DATE – NATIONAL



All courses were closed in April.

May was 27% down on May 2019 with the vast majority of courses not reopening until the end of the month.

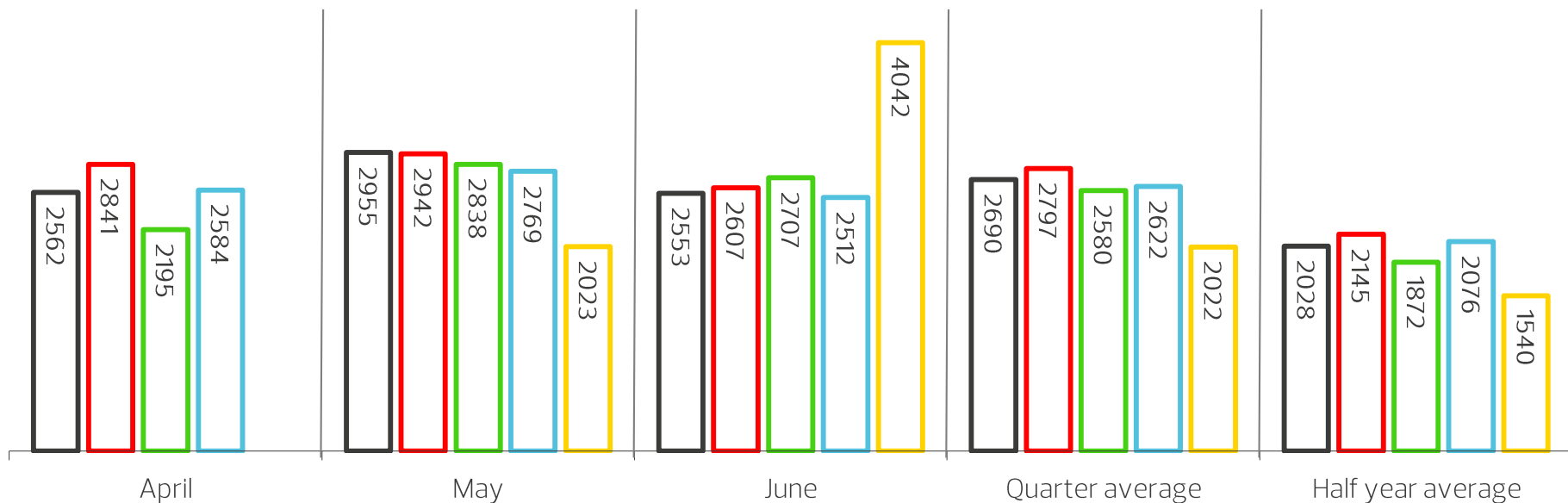
In June there was a 61% increase over June 2019 which helped to reduce the quarter deficit to only 23%.

The half year position is 26% down on half year 2019.

## ROUNDS PLAYED 2020 – National

Average number of Rounds Played per course  
in 2<sup>nd</sup> Quarter ~ 2016 – 2020

■ 2016 ■ 2017 ■ 2018 ■ 2019 ■ 2020



Movement vs. 2019

April	Down 100.0%
May	Down 27.0%
June	Up 60.9%
Quarter average	Down 22.9%
Half year average	Down 25.8%

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# **USING SPORTS MARKETING SURVEYS INC. DATA**



## USING SPORTS MARKETING SURVEYS INC. DATA

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  - The information should be a clear, fair and accurate representation of what our research indicates
  - 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.

# **CONTACT DETAILS**



## CONTACT DETAILS

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INVESTIGATION

INSIGHT

ACTION

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