

SPORTS MARKETING SURVEYS INC.

2020 BGIA Executive Dashboard...

SPORTS MARKETING SURVEYS GB ROUNDS PLAYED TOPLINE

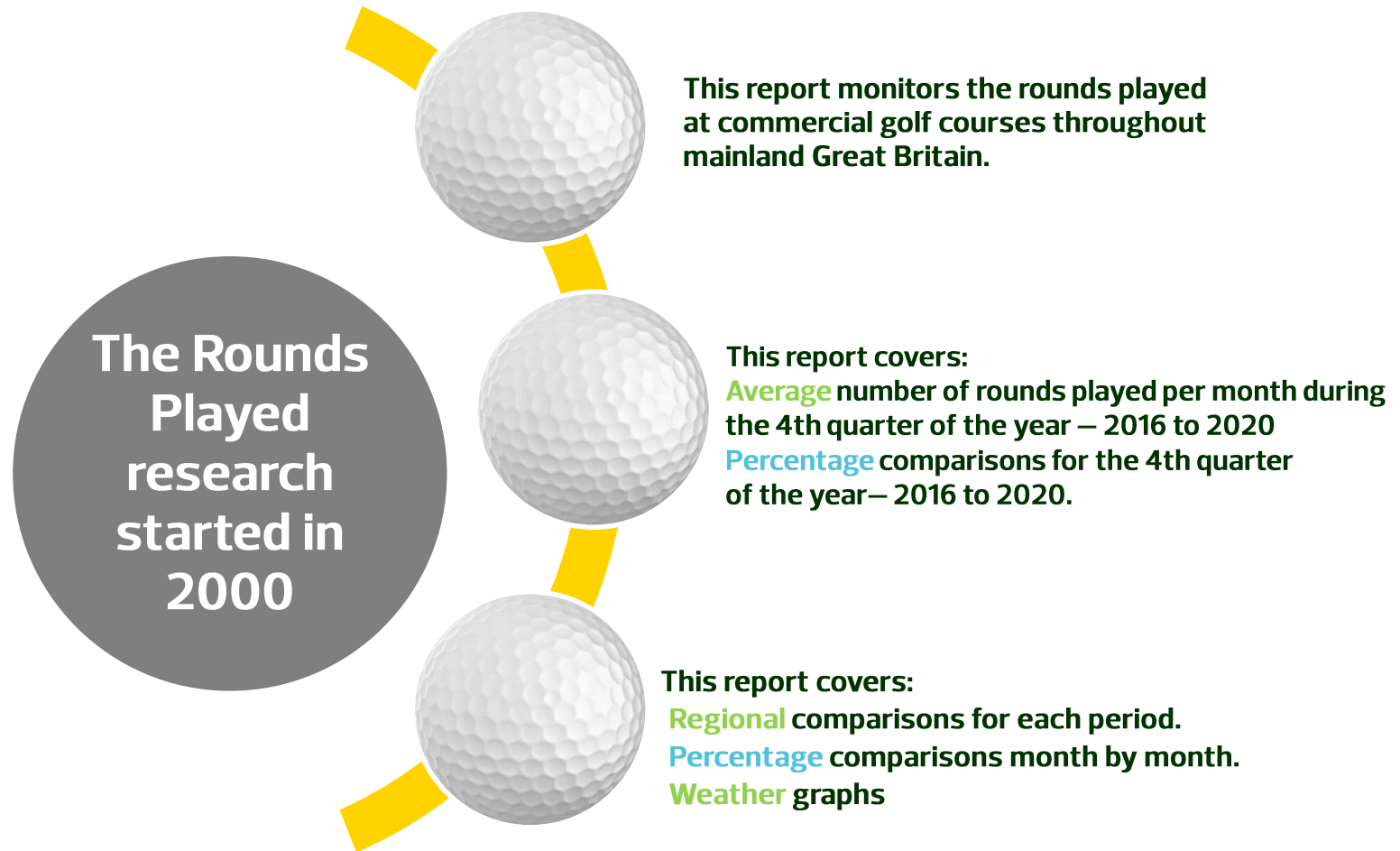
4th Quarter 2020



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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 commercial 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

- October began very unsettled, with Storm Alex bringing rain and strong winds to much of the UK. From the 4th to 13th it remained unsettled with rain or showers. It was more settled from the 14th to 18th with easterly winds, though many places were rather cloudy at times. The weather turned very wet and windy from the 19th onwards. For most of the UK it was a wet and dull month.
 - Rainfall was 142% and sunshine 72% of average.
- November began mild, wet and windy, but briefly turned colder and more settled around the 4th–7th. Southerly and south–westerly winds blew frequently from the 7th to 18th, bringing mild weather with wet and windy spells. It continued mostly unsettled and mild until the 25th when it became settled and colder (26th to 29th)with high pressure and variable amounts of cloud with widespread fog.
 - Rainfall was 84% and sunshine was 93% of average. It was much drier than average near north–east coasts. Sunshine was above normal over northern Scotland and in East Anglia.
- The first week of December was unsettled and cold, with sleet and snow over high ground. It turned milder from the 8th, while remaining generally wet. A south to south–westerly type dominated from the 13th to 23rd bringing bands of rain interspersed with brighter showery weather. It became colder during the last week, with widespread wet and windy weather from Storm Bella on the 26th .Cold and unsettled weather continued during the last few days with lying snow reaching low levels in some counties.
 - Rainfall was 135% and sunshine was 93% of average. Parts of eastern Scotland, East Anglia and Gloucestershire had more than twice the normal rainfall

INTRODUCTION

CONTRIBUTING FACTORS continued – COVID 19 Situation

- All courses were closed throughout April
- In May golf resumed :
 - 13th England.
 - 18th Wales.
 - 28th 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
 - 4th July in England
 - 6th July in Wales.
 - 15th July in Scotland
- England – Courses closed 5th November – 2nd December
- Wales – Courses closed from:
 - 28th October – 8th November
 - 19th November to date
- Scotland – Courses remained open for two balls only

AVERAGE PERCENTAGE CHANGE PER REGION

4th Quarter 2020 vs. 2019

■ Scotland:	Up	43.4%
■ North:	Up	65.9%
■ Midlands:	Up	42.3%
■ South:	Up	29.6%
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■ National:	Up	41.2%

AVERAGE PERCENTAGE CHANGE PER REGION

Year end 2020 vs. 2019

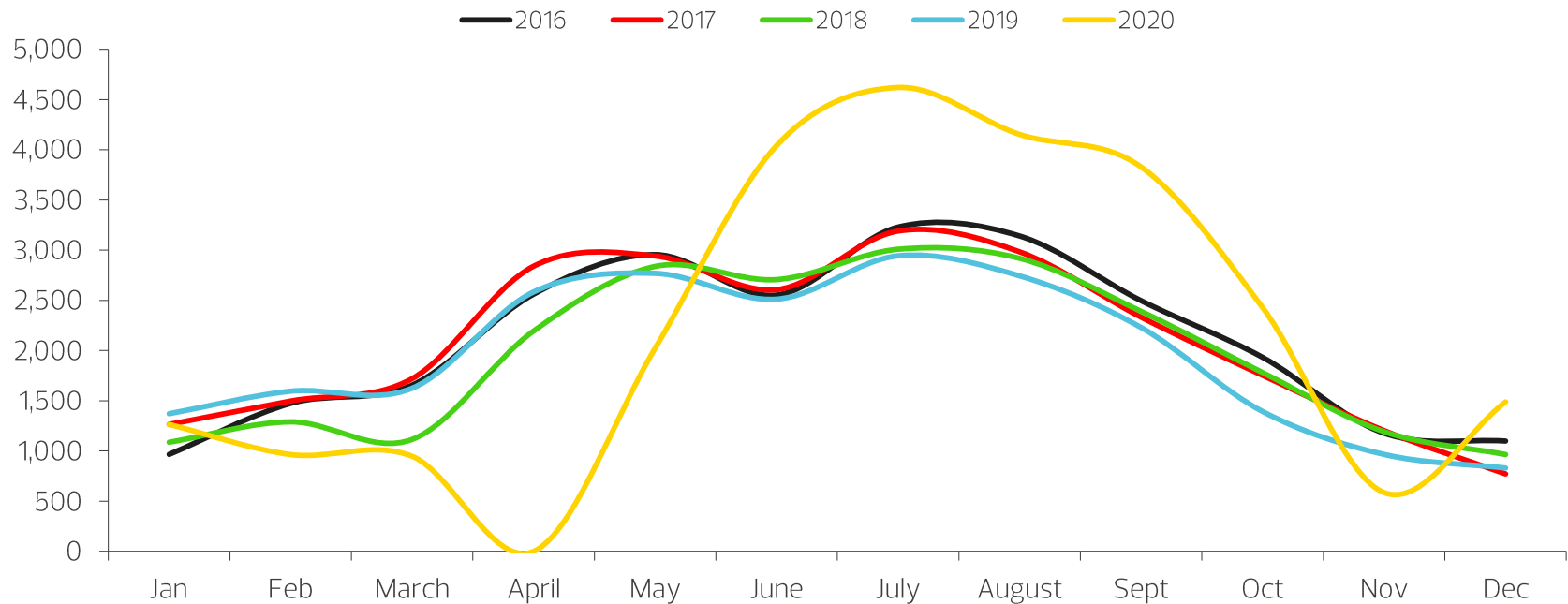
■ Scotland:	Down	14.1%
■ North:	Up	13.3%
■ Midlands:	Up	11.9%
■ South:	Up	23.1%
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■ National:	Up	11.8%

NATIONAL SUMMARY



ROUNDS PLAYED YEAR TO DATE – NATIONAL

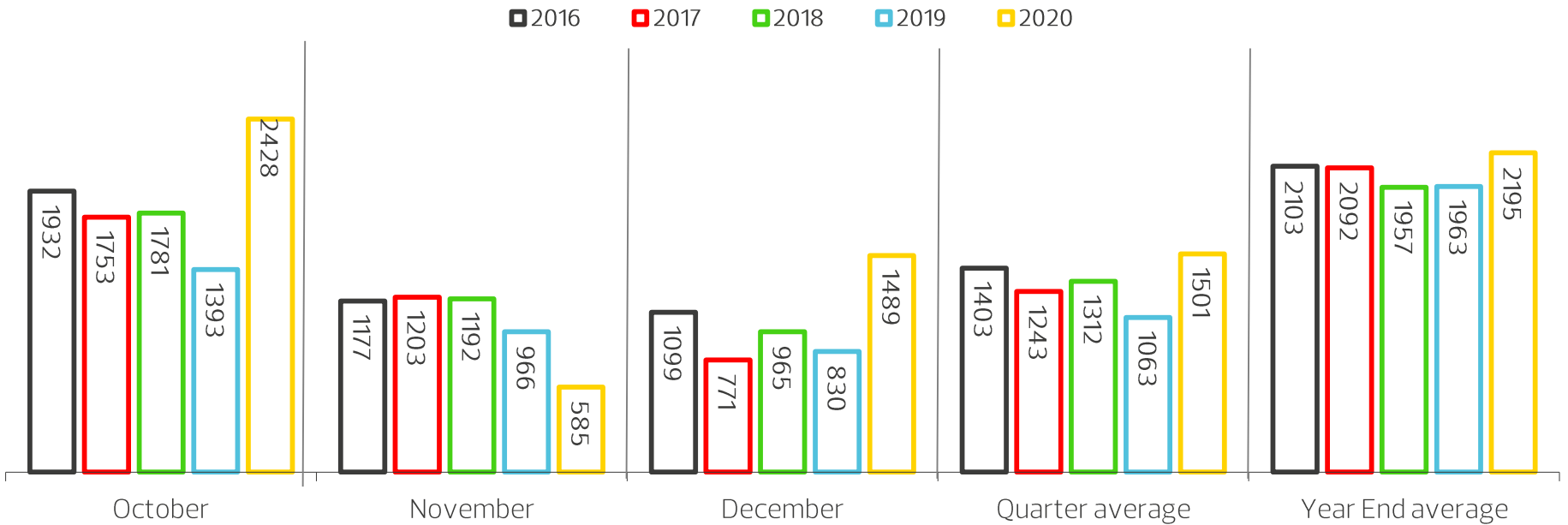
Average number of Rounds Played per course
in each month ~ 2016 – 2020



Both October and December saw an increase of over 70% when compared to October & November 2019. The deficit in November due to the closure of all golf clubs in England and Wales has been made up completely resulting a quarter growth of 41% on 4th Quarter 2019. The year end position shows a 12% gain over 2019.

ROUNDS PLAYED 2020 – National

Average number of Rounds Played per course
in 4th Quarter – 2016 ~ 2020



Movement vs. 2019	
October	Up 74.3%
November	Down 39.4%
December	Up 79.4%

Quarter average	Up 41.2%
Year end average	Up 11.8%

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USING SPORTS MARKETING SURVEYS INC. DATA



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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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