
2020 BACK-TO-NORMAL BAROMETER

BENCHMARK PREVIEW

The Golf Industry

April 2020





Every Company Has Three Questions



- Every sports and leisure executive is asking...
 - “When will things be back to normal?”
 - “How do we restore confidence so customers return?”
 - “What will the new normal look like?”
- We need to know what people are thinking, why they are thinking it, and how many are thinking it
- We just:
 - Surveyed 513 American adults who participate in sports and leisure activities on March 30-April 1
 - Conducted a series of qualitative depth interviews with a similarly diverse group of Americans engaged in sports and Leisure on April 8-9
 - Completed a social media meta-scan of some 6,852 unique, and topically relevant US-based social media conversations between the period of 3-18 to 3-22-20 based on the following social media coverage: Full Twitter Firehose, 50M Blogs, 15M Forums, 9M Daily Facebook, 4M Daily Reddit, and 865K Daily Customer Reviews



Key Macro-Level Headlines: Benchmark Survey Wave

- Comparing travel and leisure attitudes in September 2001 and July 2009 to today finds more consumer hesitancy now about returning to those activities. But the industry's silver lining is a majority of customers will be willing to return to airplanes, hotels, and event venues once multiple conditions have been met. And approximately one-third of respondents would jump back into these activities without hesitation right now.
- Fifty percent of respondents in late September 2001 said they "plan to spend just as much money on travel next year as I did in the past year;" 28% strongly agree now. And while 50% strongly agreed in 2001 that "Taking a vacation 500+ miles is a priority for me and my family in the next 12 months," just 35% say that now. Similarly, while 44% of respondents in July 2009 strongly agreed with the statement, "I'm planning to take a major vacation this year," only 32% strongly agree now.

Our benchmark wave of consumer tracking research was conducted March 30-April 1 with a nationally representative and projectable sample of sports fans, participants and active travelers/ resort and casino enthusiasts. Stable bases were recruited across each of several condition specific categories for all major sports.



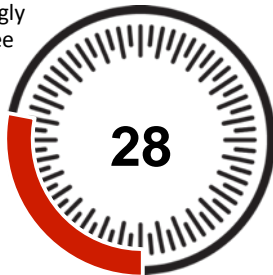
How much assurance is needed to resume sporting event attendance...and when?

Focus on Golf fans



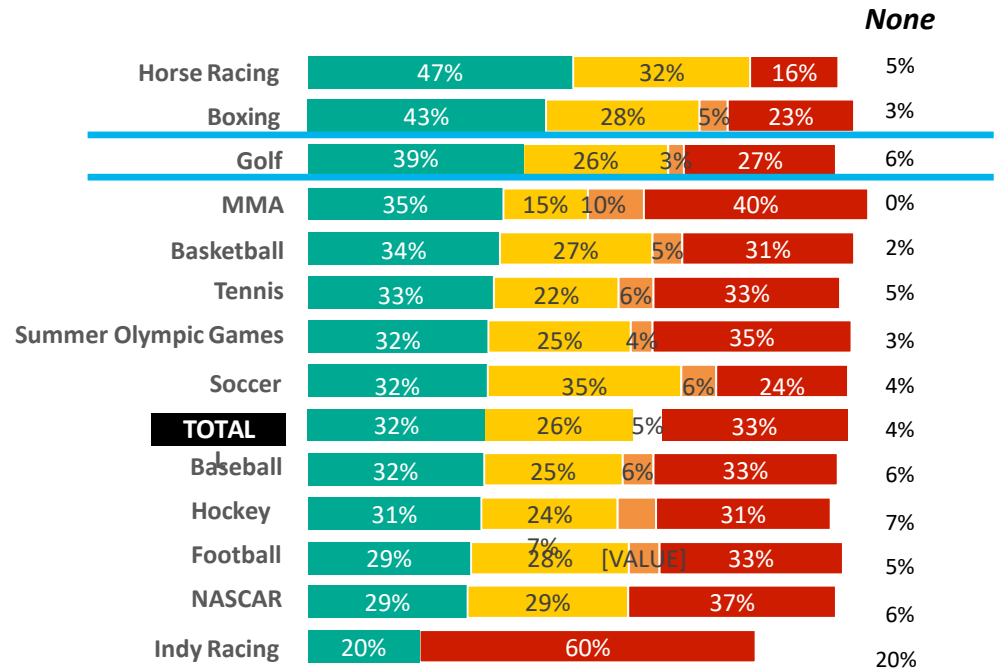
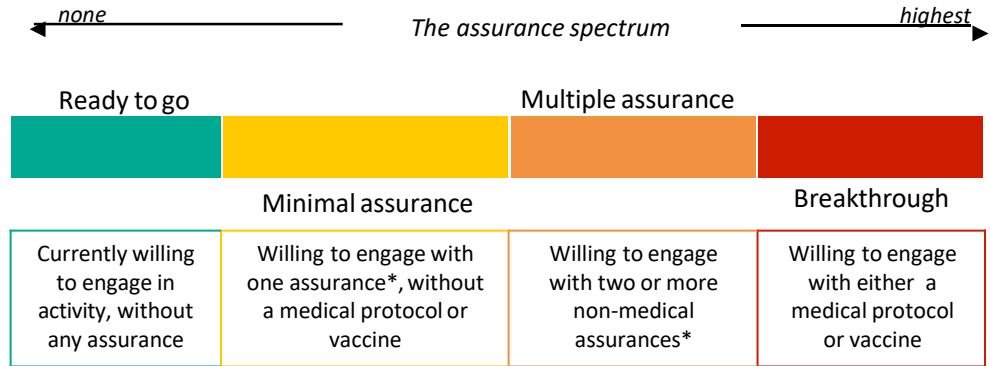
Likelihood to attend a live sporting event within the next 2 months

Strongly Agree



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Golf fans are more likely to attend a live sporting event within the next two months and are more willing to attend without and assurance.



*Non-medical assurances include assurances from either the U.S. Government, companies, multiple media outlets or a reputed medical authority.

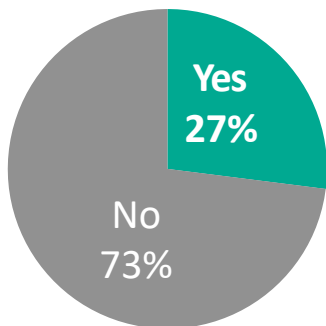


Focus on Golf fans



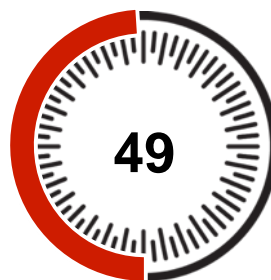
About one-third of fans reported playing golf within the past two weeks but only one-fifth are planning to play within the week. Half of golf fans strongly agree that courses should remain open with precautions.

Have you played golf within the past two weeks?



Males	29%
Age: 35 to 44	49%
Northeast	40%

Golf courses should remain open for play, as long as social distancing and other precautions are encouraged

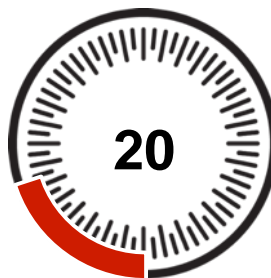


Strongly Agree

Golf today, can be an oasis for me from the stresses of life



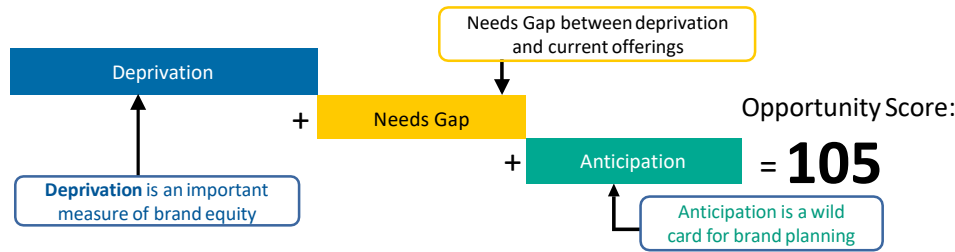
I am planning to play golf within the next week



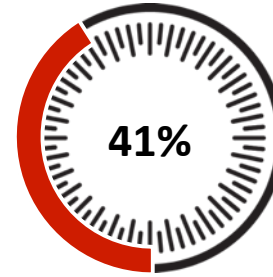
Strongly Agree

Golf is less important to me today than it was last year

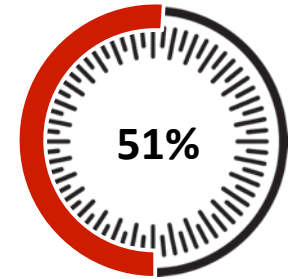




During this time, I am actively seeking sports to watch

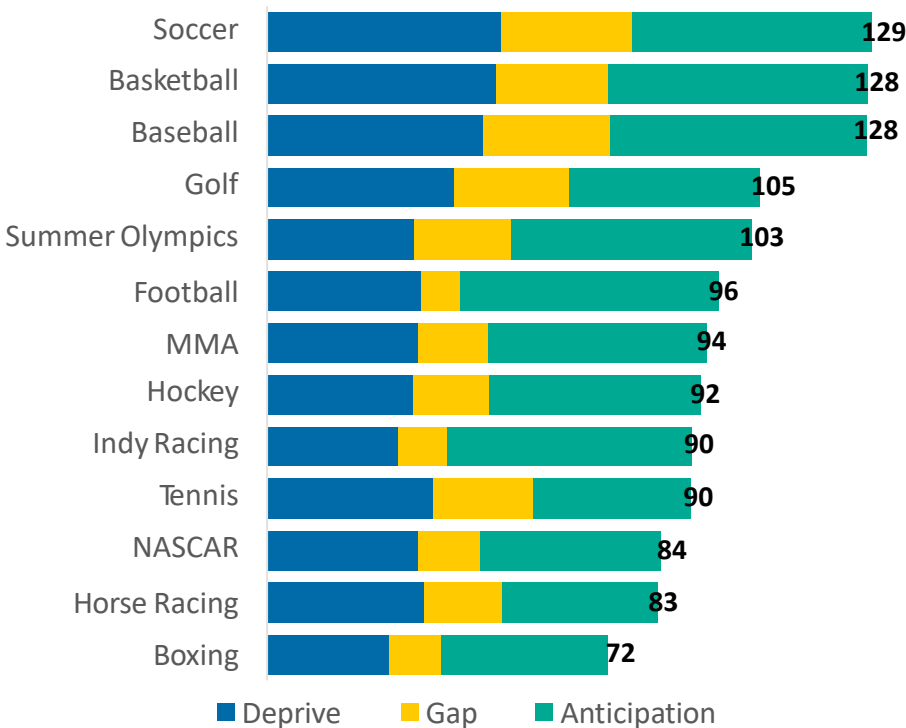


The interruption of live sports has created a significant void in my life



Strongly Agree

Opportunity Score by sport...



Sports Scorecard reveals which sports continue to entice fans during pandemic

Soccer, Basketball and Baseball achieve the highest opportunity scores with their fans feeling highest levels of deprivation during the COVID-19 pandemic. Golf and the Summer Olympic games follow closely behind.

As expected, Football fans have experienced relatively low levels of deprivation as the current content offerings both maintain high engagement levels as well as build anticipation.

The NFL is most frequently named (on an unaided basis) as the "sports organization doing the best job of keeping fans engaged during this time of disruption," followed by the NBA and MLB.

Football and Baseball fans are most likely to indicate that upon the return of these sports they will likely follow them more closely. It is well worth noting that neither of these sports have played a single regular season game in 2020.

-David Klein

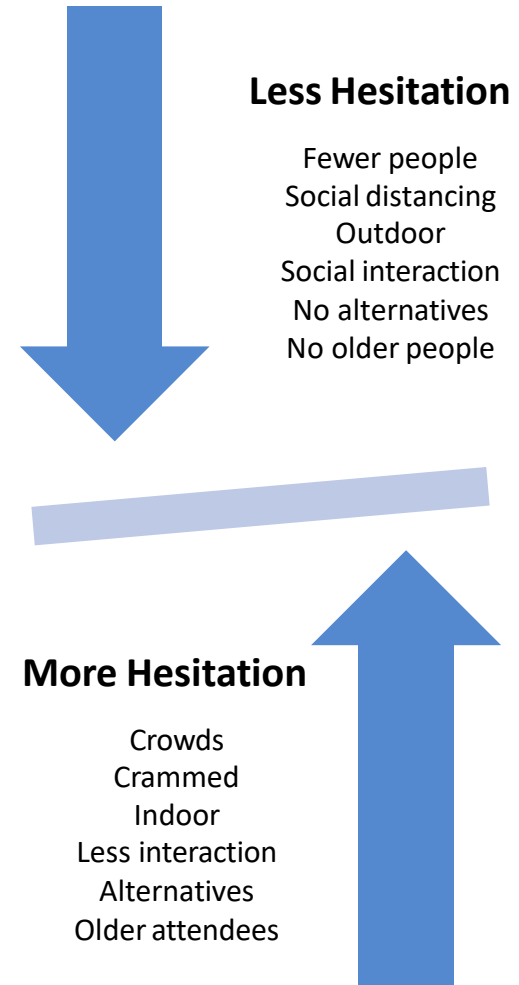


The Things Consumers Say They Will Want

CONTINUED SOCIAL DISTANCING



- Several factors play into consumers' willingness to return to normal activities
- With these in mind, they are more likely to go to the gym, play golf, or go camping/hiking early on--vs. go to a movie theater, bar, or professional sporting event





The Things Consumers Say They Will Want

DESIRE TO BE SOCIAL

- People have really missed social interactions
- As a result, some suggest they will look for opportunities to be social while avoiding the more significant risks of some activities
 - Ex: host a baseball-watching party at their home with friends vs. going to the stadium, or take a road trip with family vs. flying abroad



DISTANCE FROM FOREIGNERS



- Consumers are sensitive to the risks foreigners bring to leisure activities, both in the U.S. and abroad
- They're less trustful of how other countries handled or communicated their virus status
- These concerns play out at U.S. destinations that attract international guests, such as amusement parks
- Also concerns about international flights, and willingness to stay in other countries