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SHOW CONNECTS

The Golfer in the COVID-19 Era

Insights from our
Back-to-Normal Barometer



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The Back-to-Normal Barometer

ORIGINS

- **2001 Golf Digest Companies Travel Confidence Index**
 - Measured golfer attitudes vs. the affluent general public
 - Willingness to travel
 - Willingness to spend on luxuries and discretionary purchases
 - Consumer attitudes on personal finance, the prospects for retirement and the U.S. economy
- **2009-Present Sports and Leisure Research Group Golfer Omnibus Work**
 - Presented annually at PGA Merchandise Show Wednesday Breakfast tracks forward looking golfer perceptions on the year ahead in:
 - Overall participation levels
 - Outlook on planned spending across hard goods, soft goods and travel categories
 - Golfer attitudes on personal finance, discretionary spending and the U.S. economy
 - Contemporary issues in golf





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The Back-to-Normal Barometer

AMERICA STANDS AT AN INFLECTION POINT

- We just completed the ninth wave of a twice-monthly tracking study that listens to the voice of the consumer
 - Survey research
 - In-depth interviews
 - Social media analyses
 - Online dial tests

**The
New York
Times**



**WASHINGTON
Examiner**

Forbes

Bloomberg



**The
Washington
Post**

**The
Salt Lake
Tribune**

What's it going to take to bring consumers back?

Where is the greatest pent-up demand?

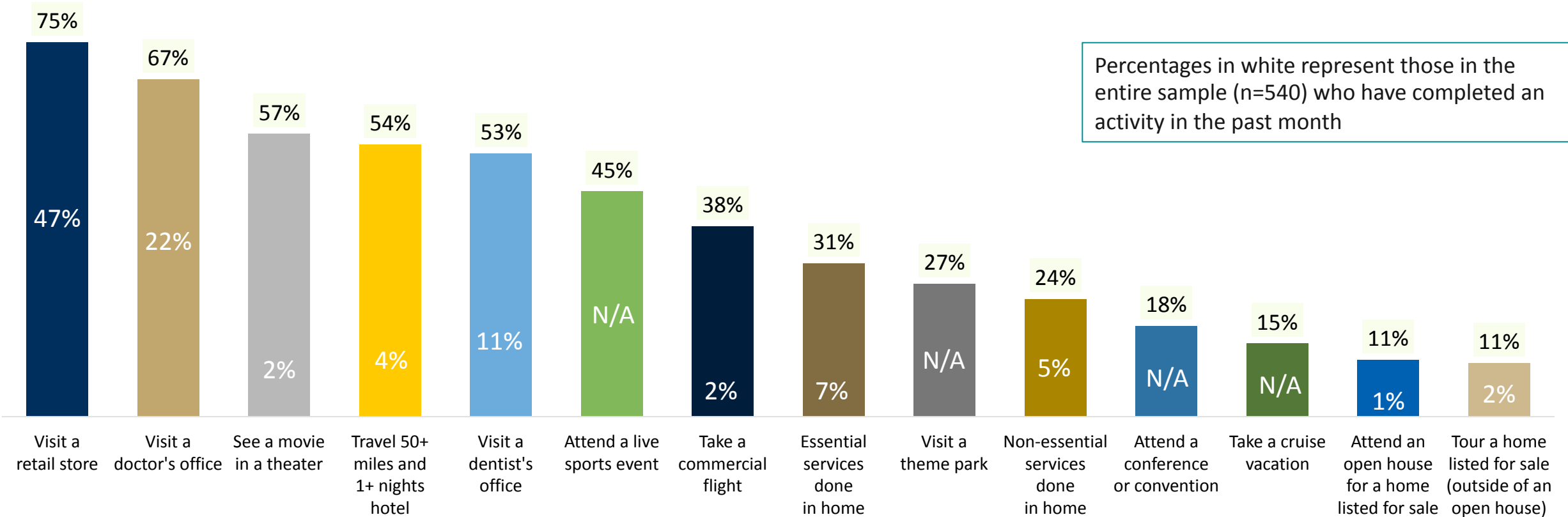
What will the new normal look like?

How do various sports and leisure activities navigate through these times?



CONTEXT: Respondents Actively Engage

PERCENT WHO HAVE PARTICIPATED IN THIS ACTIVITY IN THE PAST 12 MONTHS



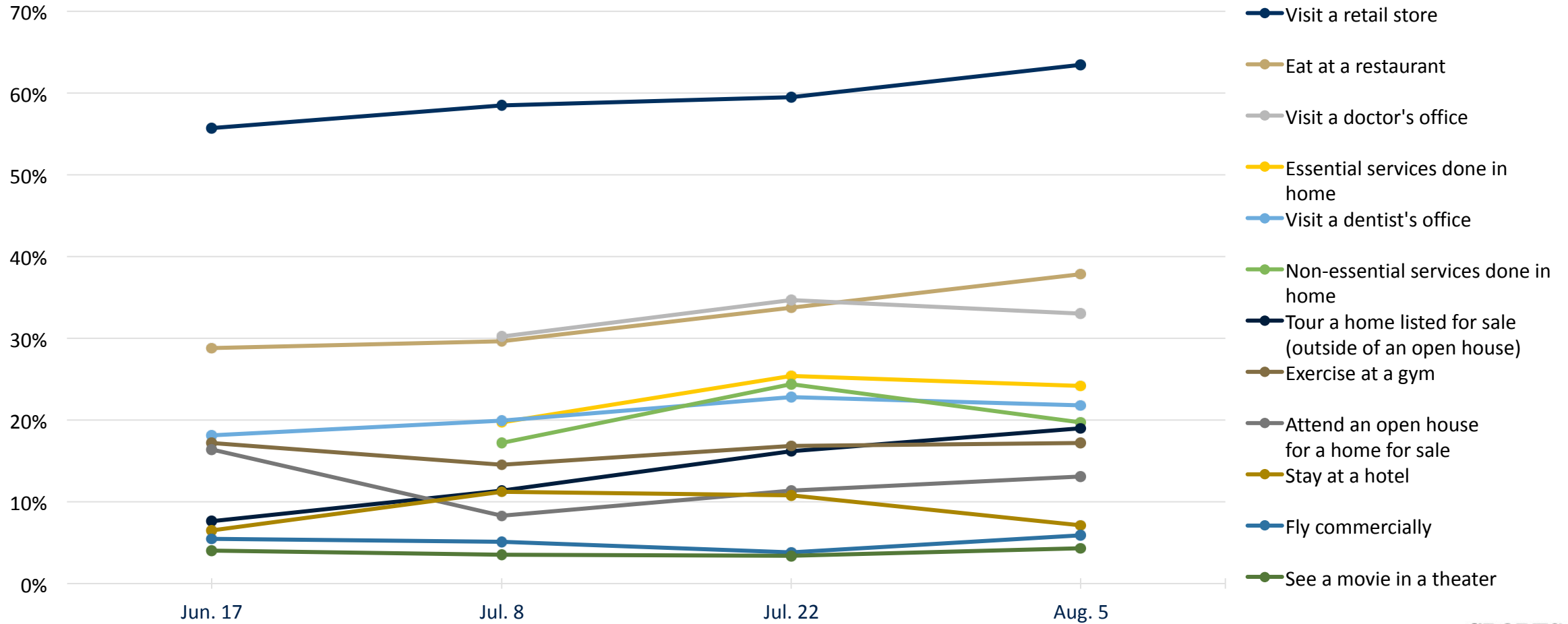


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What Past-Year-Doers Have Done In The Past Month

AMONG THOSE WHO HAVE PARTICIPATED IN THIS ACTIVITY IN THE PAST 12 MONTHS

Percent who had done this activity in the past year, and who have also done it in the past month

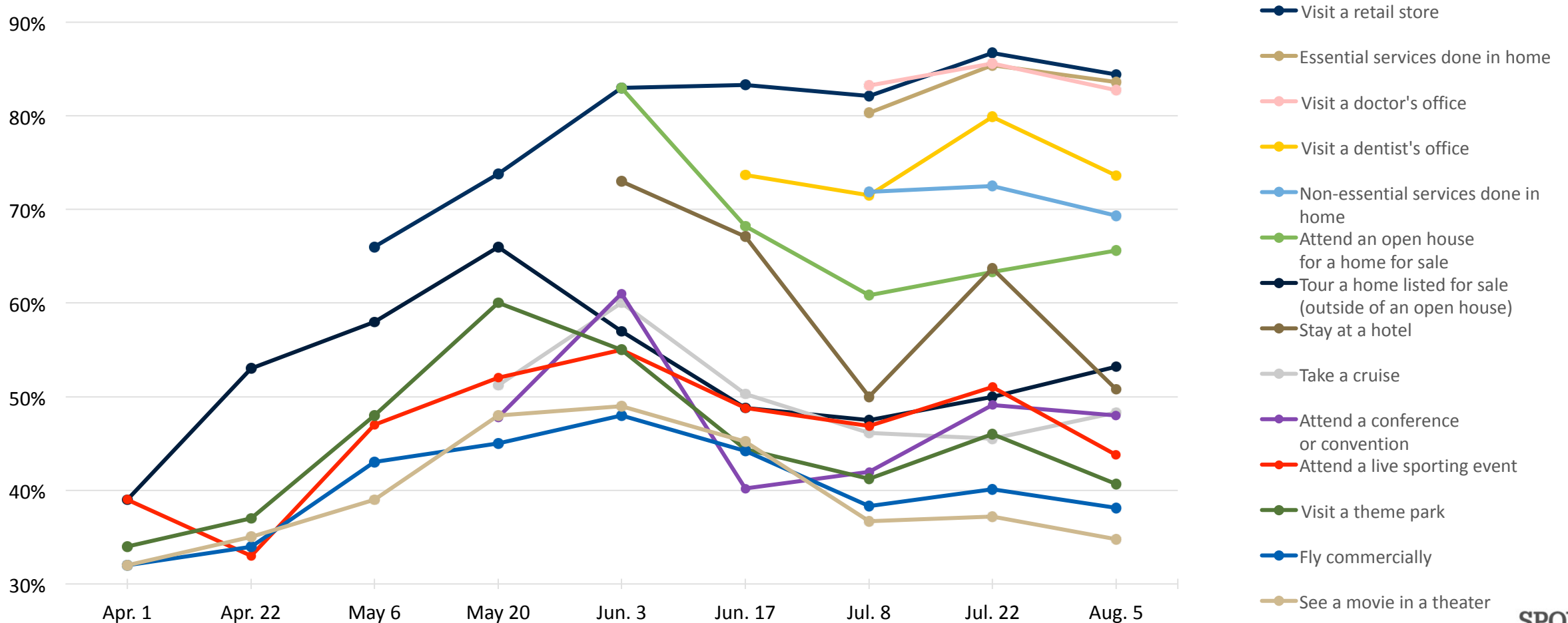




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A Sizable % Would Return Tomorrow

ARE YOU CURRENTLY WILLING TO ENGAGE IN THE FOLLOWING ACTIVITIES, WITHOUT HESITATION?

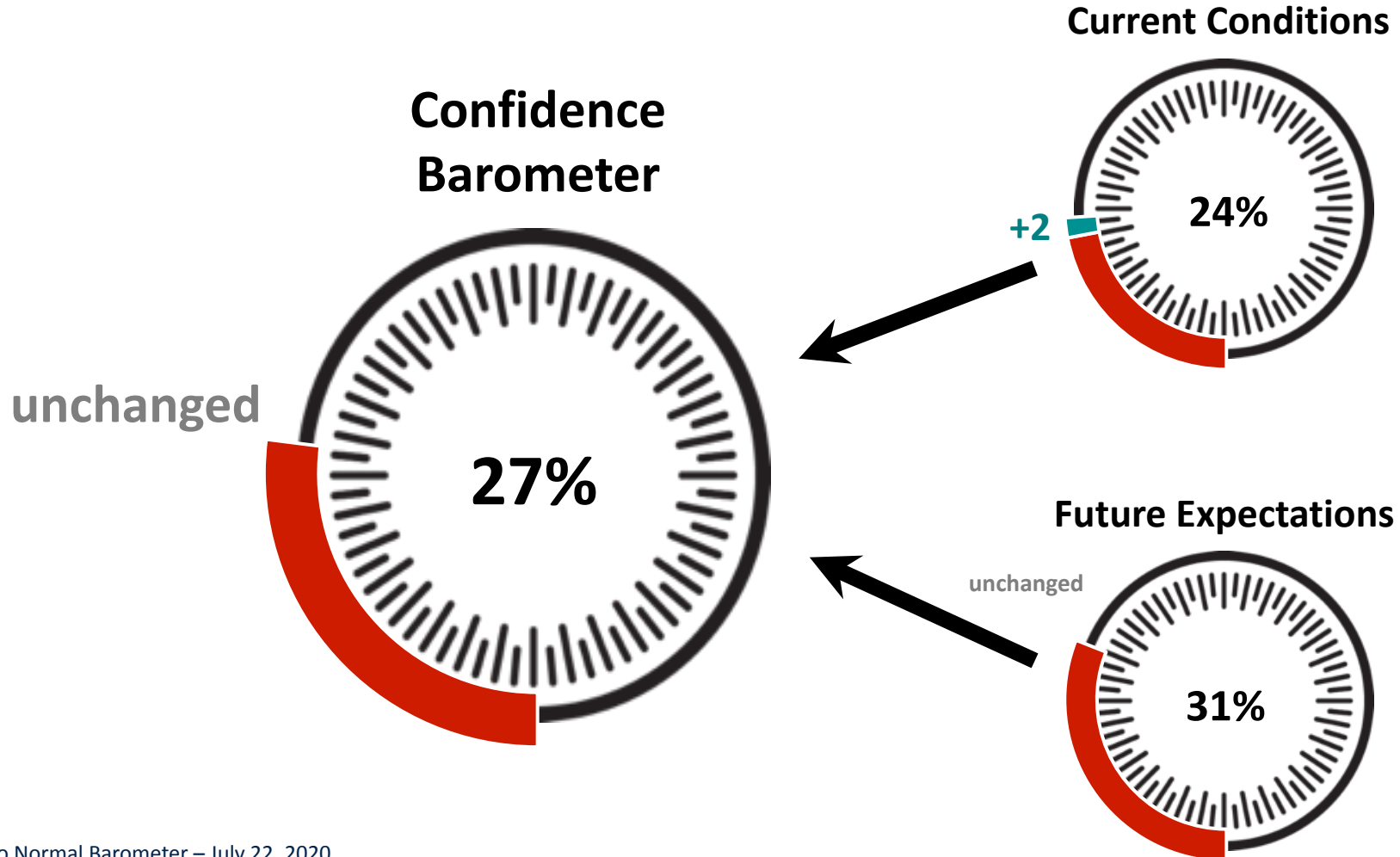


n=540, Back to Normal Barometer, Aug. 5, 2020



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Confidence: Where We Were Is Where We Are

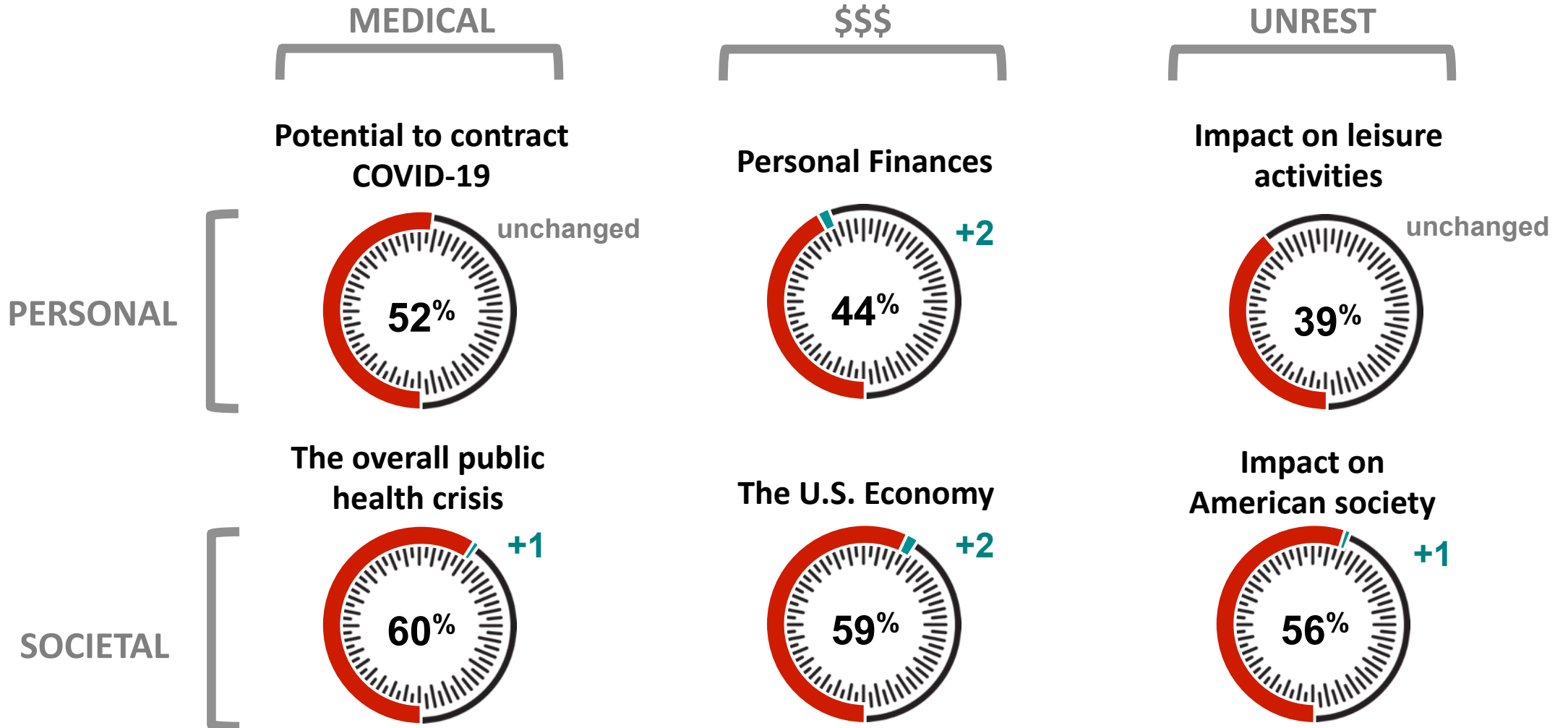


Wave 8: n=576, Back to Normal Barometer – July 22, 2020
Wave 9: n=526, Back to Normal Barometer – August 5, 2020



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Societal Concerns Continue To Dominate

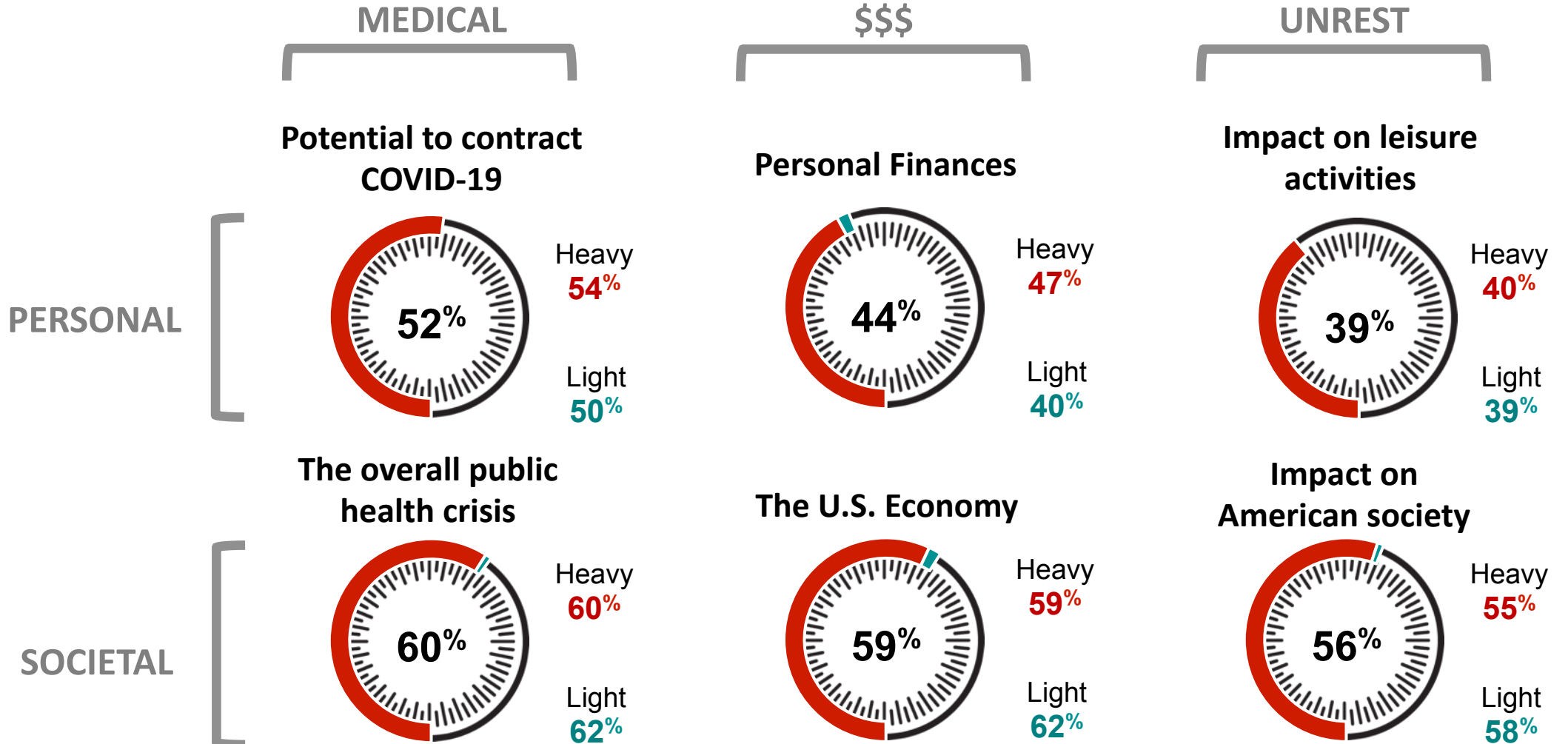


*Percentage who said they are extremely concerned (top three box).
Wave 8: n=576, Back to Normal Barometer – July 22, 2020
Wave 9: n=526, Back to Normal Barometer – August 5, 2020



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Societal Concerns Continue To Dominate

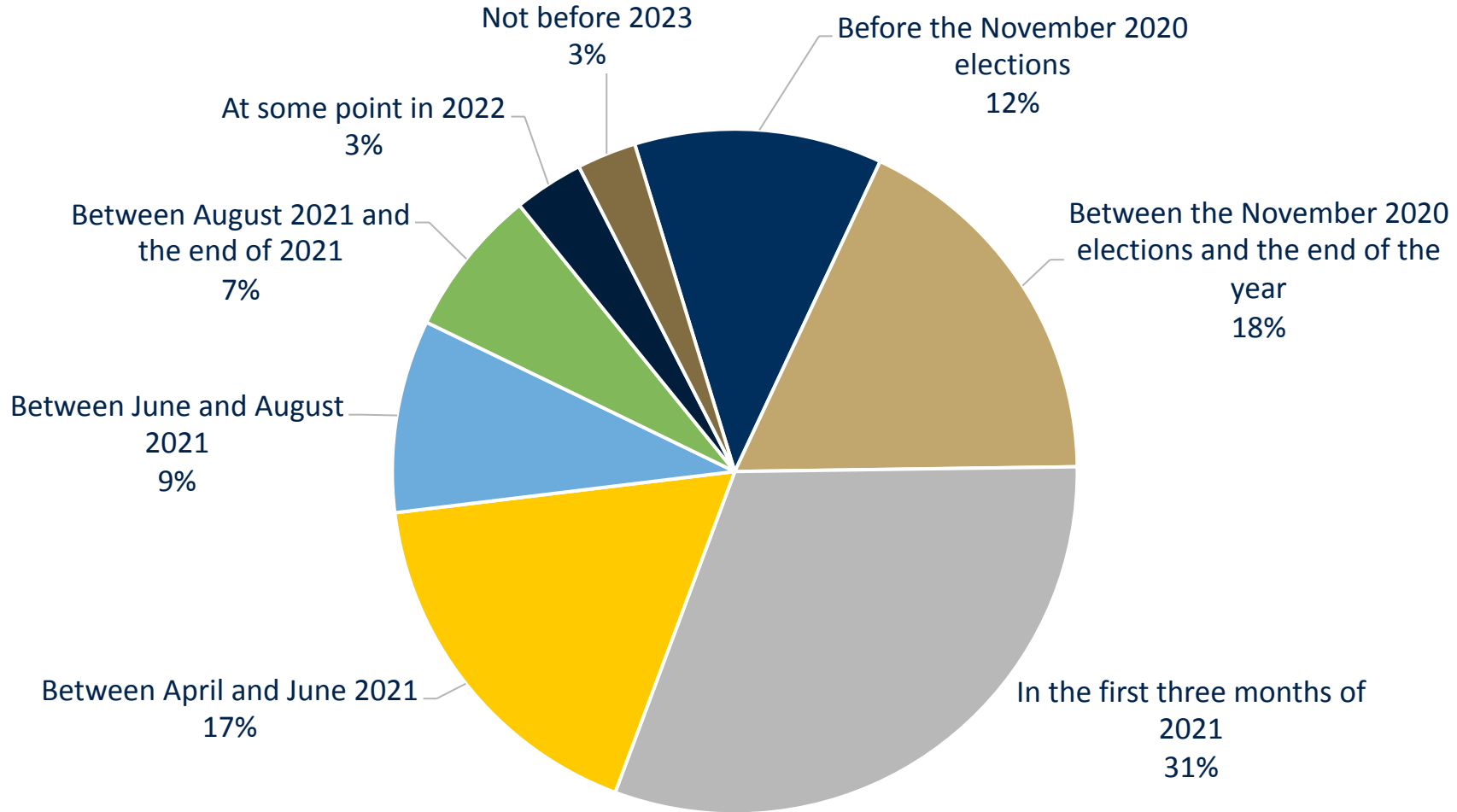


*Percentage who said they are extremely concerned (top three box).
 Wave 8: n=576, Back to Normal Barometer – July 22, 2020
 Wave 9: n=526, Back to Normal Barometer – August 5, 2020



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When Will A Vaccine be Widely Available?

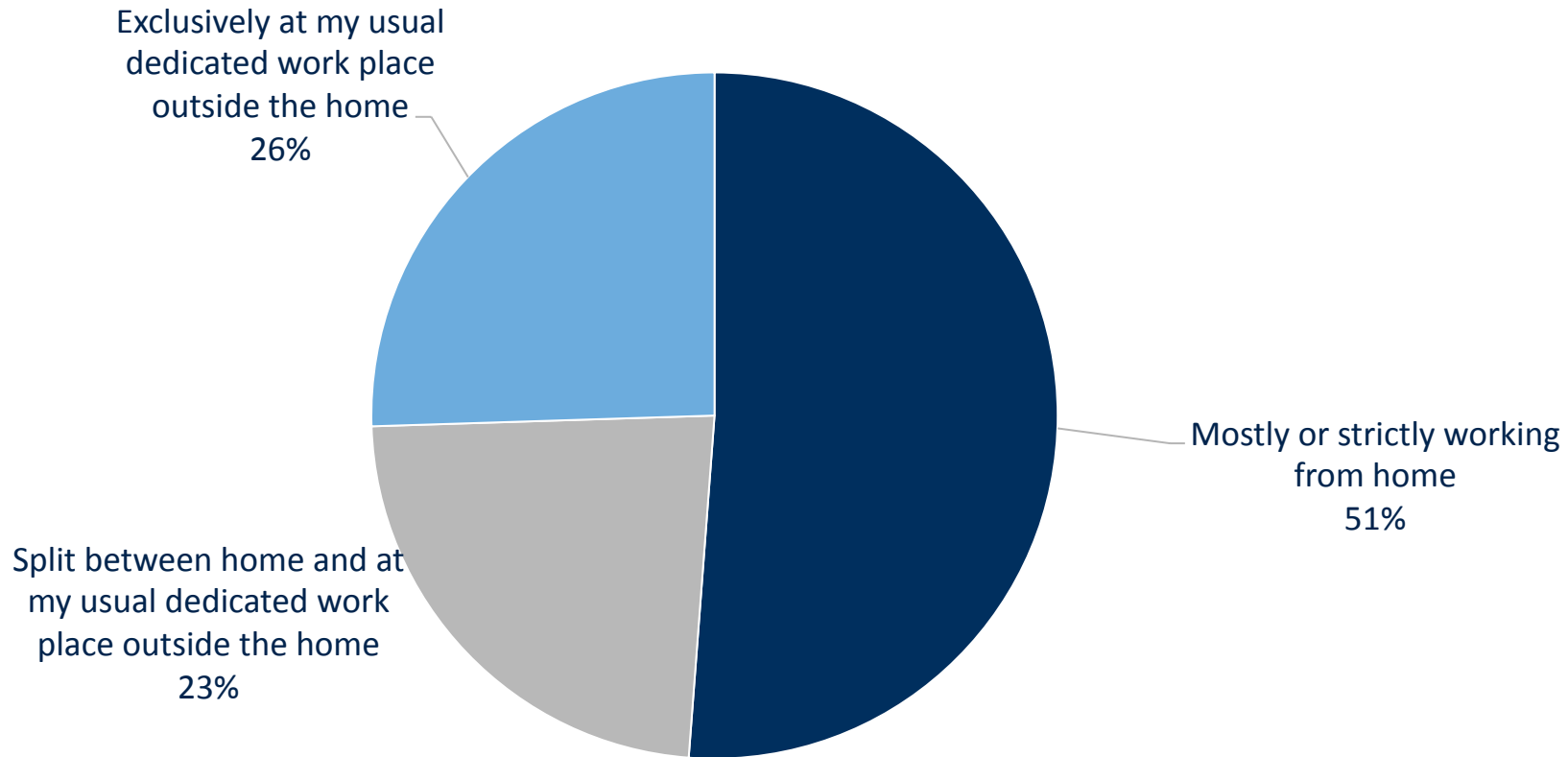




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More Than Half of Workers are Working from Home

ARE YOU PRESENTLY WORKING FROM HOME OR IN A DEDICATED WORKPLACE?



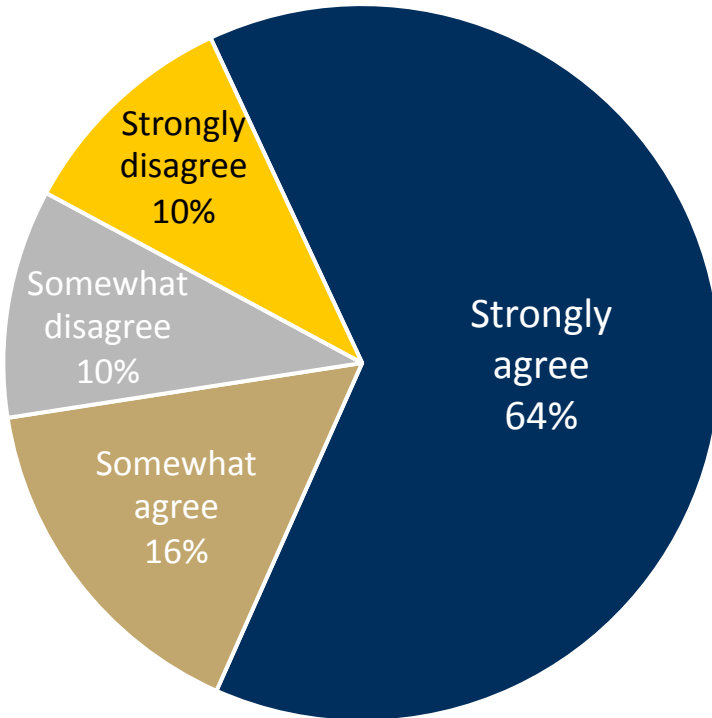


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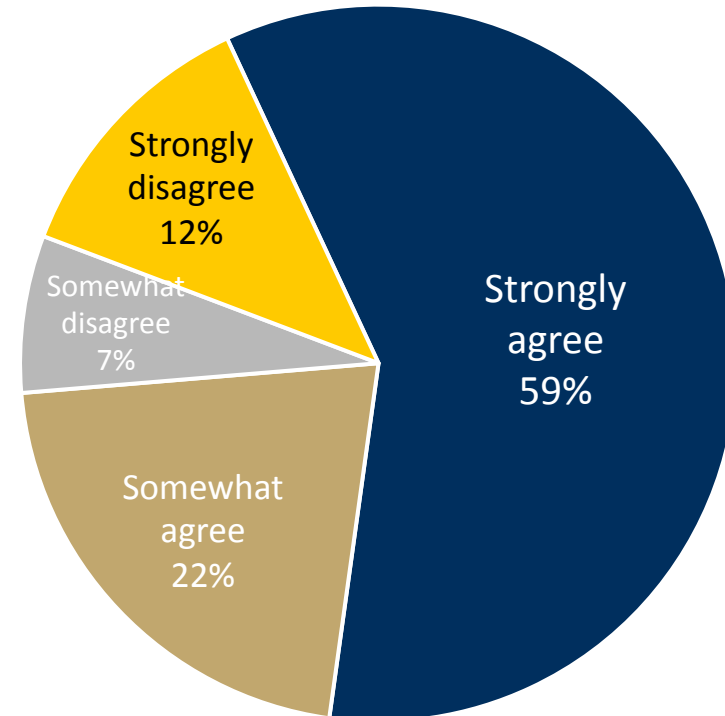
They're Worried About A Second Wave...

I'M CONCERNED THAT THERE WILL BE A SECOND WAVE OF COVID-19 OUTBREAK, REQUIRING EVENT CANCELLATIONS AND LOCKDOWNS THIS FALL.

COVID-Heavy States



COVID-Light States

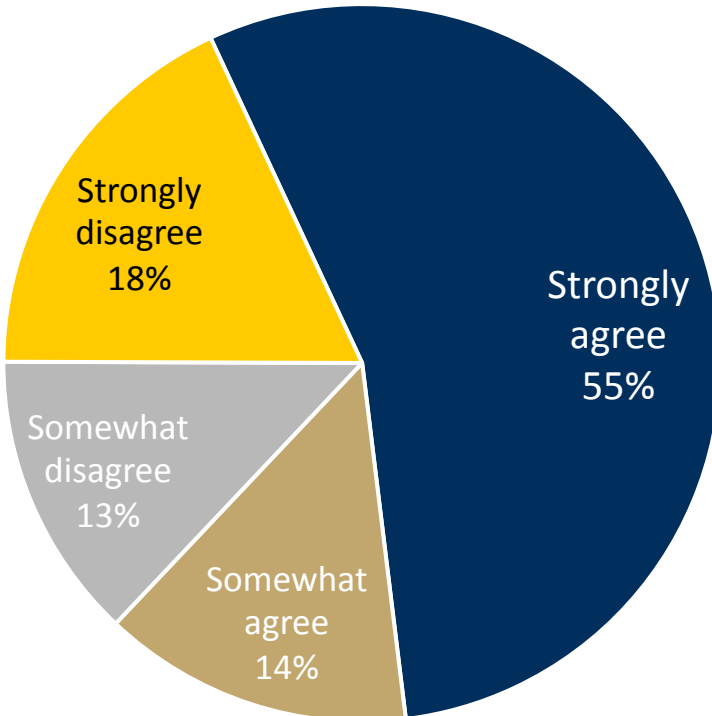




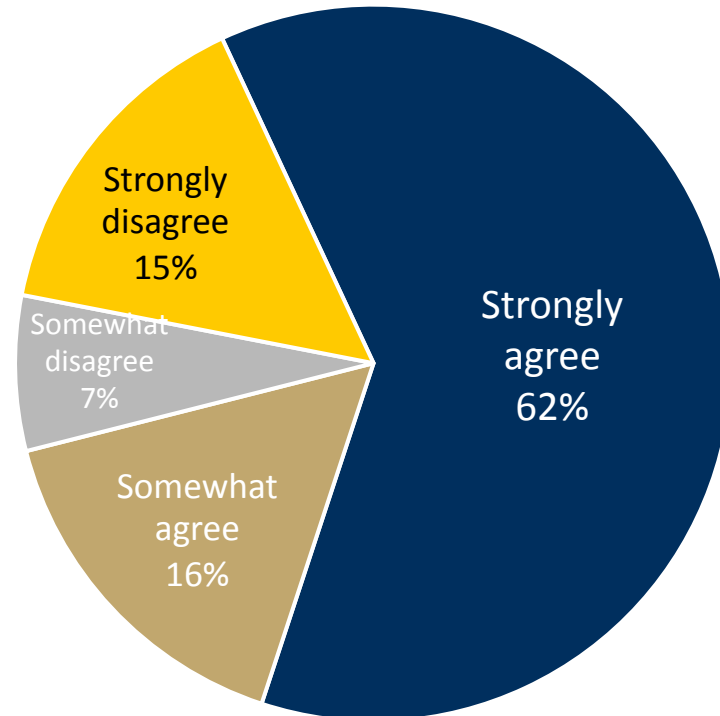
...And It's Undermining Their Willingness To Travel

THE POSSIBILITY OF A SECOND WAVE OF COVID-19 CASES IS AFFECTING MY WILLINGNESS TO TRAVEL IN COMING MONTHS.

COVID-Heavy States



COVID-Light States

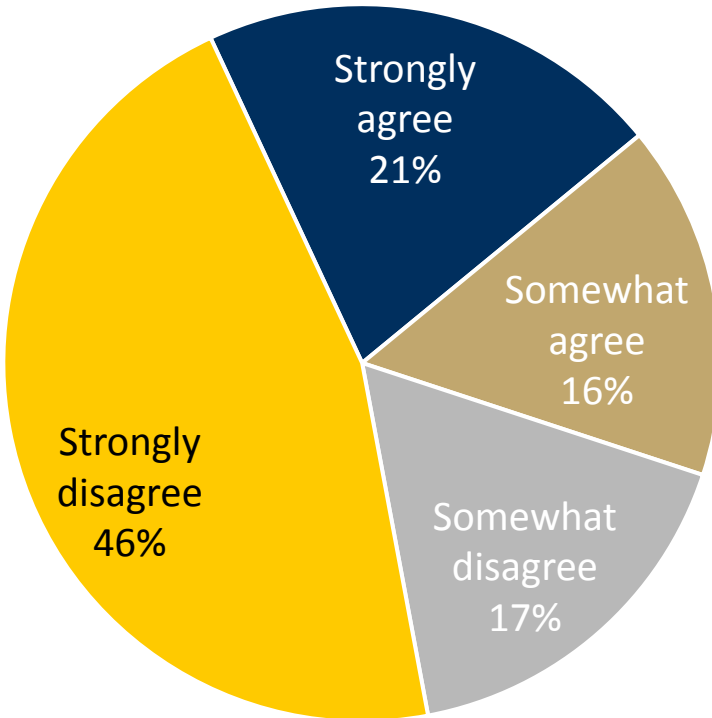




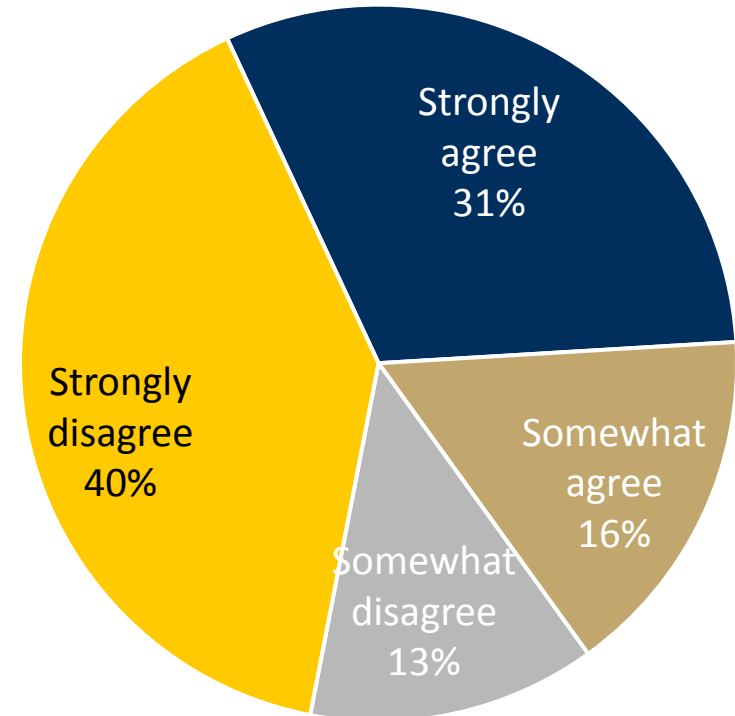
They're Worried About Losing Their Job

I'M CONCERNED ABOUT LOSING MY JOB OR BEING FURLOUGHED

WAVE 6



WAVE 7

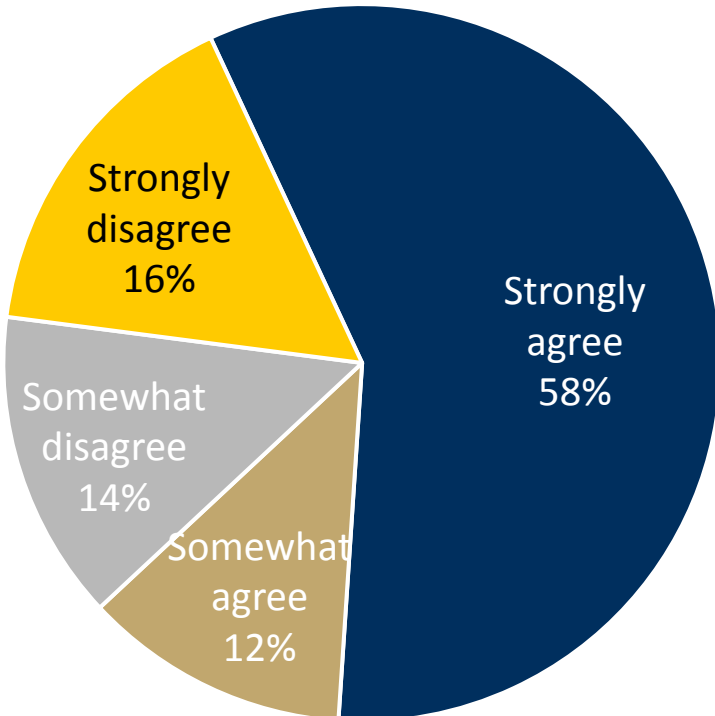




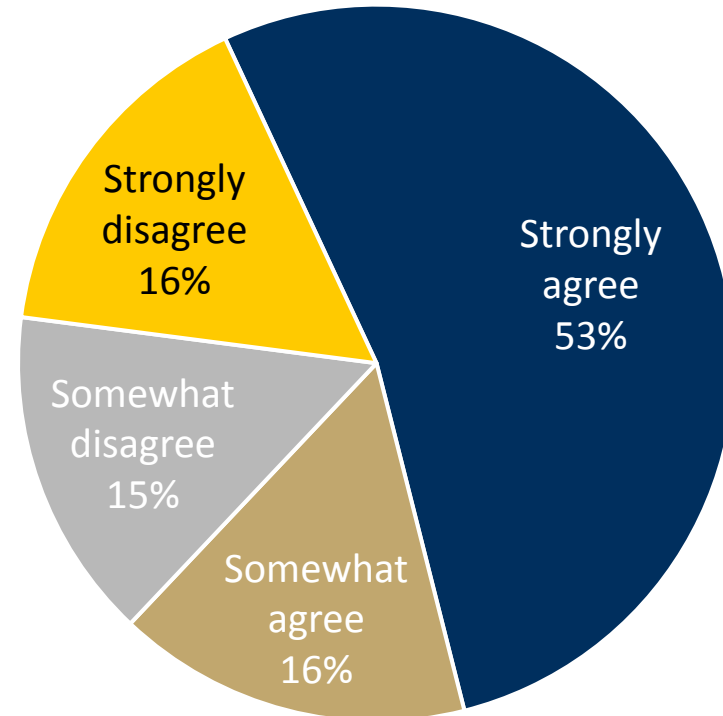
They're Worried We're Reopening Too Quickly

I'M CONCERNED THAT WE ARE MOVING TOO QUICKLY IN OPENING UP BUSINESSES IN THE U.S.

COVID – Heavy States



COVID – Light States

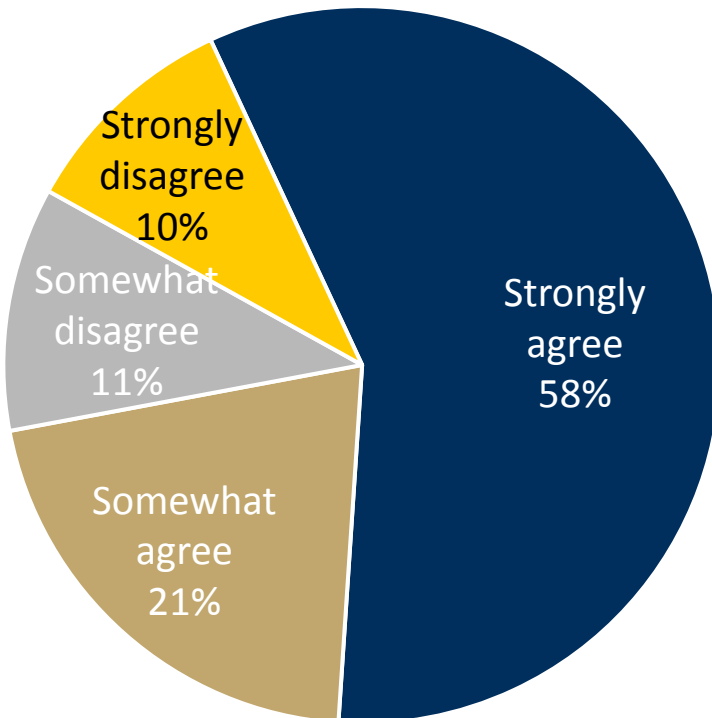




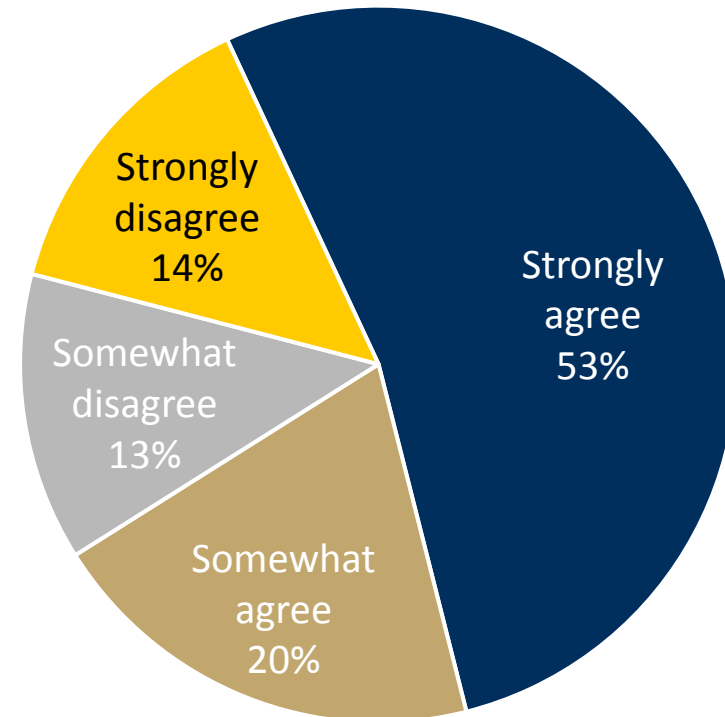
And They're Worried They're Not Getting Clear Guidance

WHEN IT COMES TO AVOIDING COVID-19, I FEEL LIKE I'M GETTING MIXED MESSAGES FROM PEOPLE IN THE...

Government



Media





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Amidst Worry, *YOU* Need To Have Their Backs

- Wisdom, certainty, and trust are in short supply
- Americans don't believe others are being as diligent in their adherence to safety protocols as they are
- In the absence of clear guidance, one's confidence to re-engage is tied to an ability to control the health risk of a given experience
- Your challenge: Can you enhance the semblance of personal control? Can you provide the certainty people crave?
 - Message: *"You don't have to worry about others' behavior; we've got you covered."*



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Example of Giving Certainty & Getting It Right

“

At the hotel, they did the extra guidelines and took the effort to have extra cleaning, make sure [there was] spacing. The staff and everyone was wearing masks. It had a pool [at] the place that we stayed, and they had it set up that you would schedule your time there. That way people weren't interacting too much. It's kind of what I was expecting that they would do in a case like that. [Their attitude was,] 'We're going to try and stay open, but we're going to follow the guidelines how we're supposed to.' It was a great experience overall.

– Nick (Male, age 36, California)

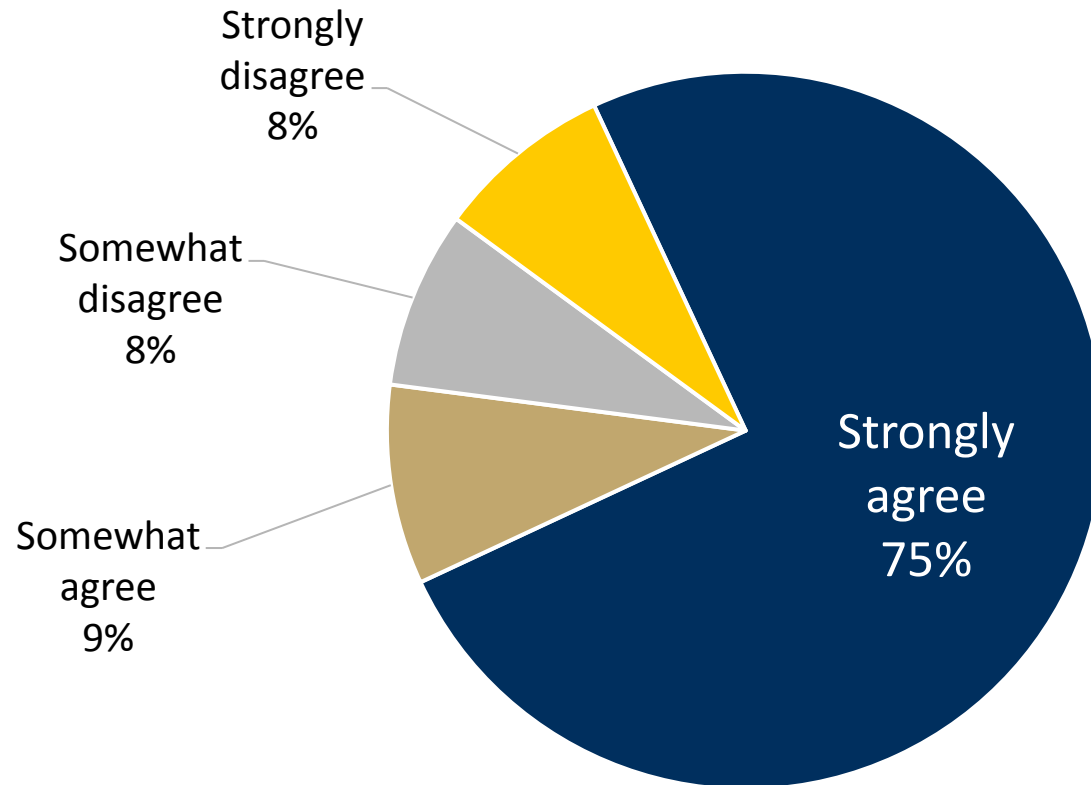
”



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They'd Wear A Mask To Avoid Being Quarantined

IT IS WORTH HAVING EVERYONE WEAR A FACIAL COVERING OR MASK WHENEVER THEY GO OUT IN PUBLIC, IN ORDER HELP PREVENT A SECOND SHUT-DOWN OF THE ECONOMY THIS AUTUMN.

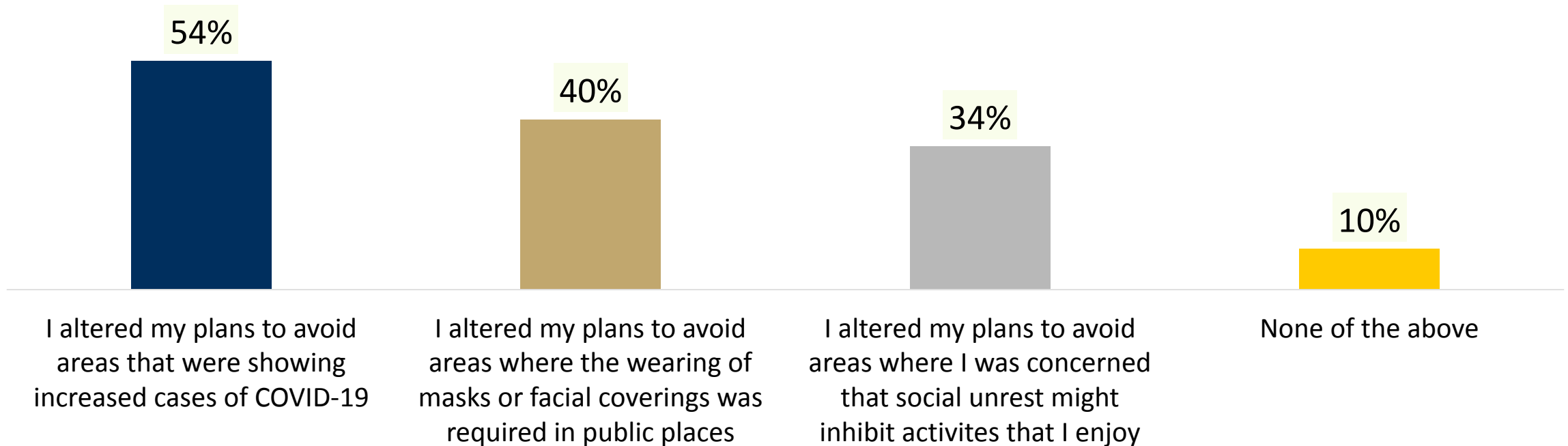




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Many Altered Plans To Avoid Cases, Masks Or Unrest

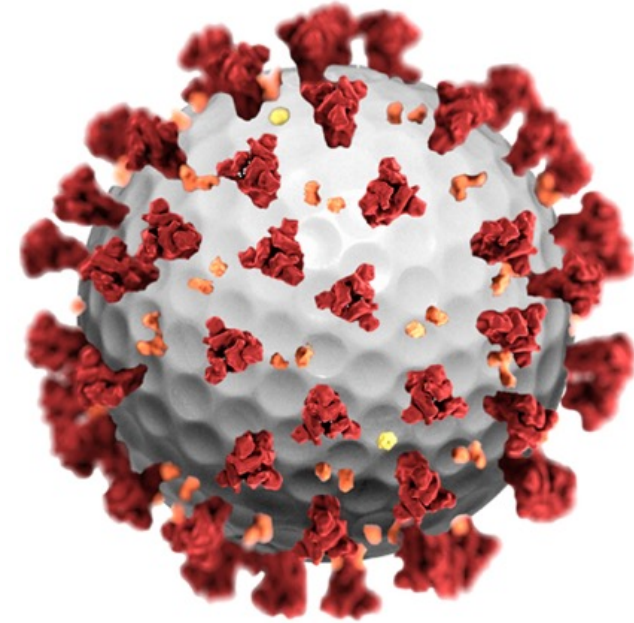
WHICH IF ANY OF THE FOLLOWING AFFECTED YOUR FOURTH OF JULY WEEKEND TRAVEL PLANS?





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Golf 20/20 Meets Golf 2020

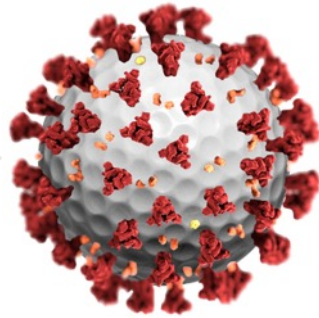




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Golf 20/20 Meets Golf 2020

HAS COVID SPAWNED A POTENTIAL NEW GOLF BOOM?



- Anecdotally and empirically we see full tee sheets
 - Amidst reports of increased play from existing golfers
 - and renewed trial from lapsed and never before players
- Golf has successfully positioned itself in the short term
 - as one of the few viable options for outdoor recreation
 - AND socialization
 - Bars are closed—But not the drink cart!
 - Adhering to safety and sanitization protocols
 - An “oasis from the chaos.”

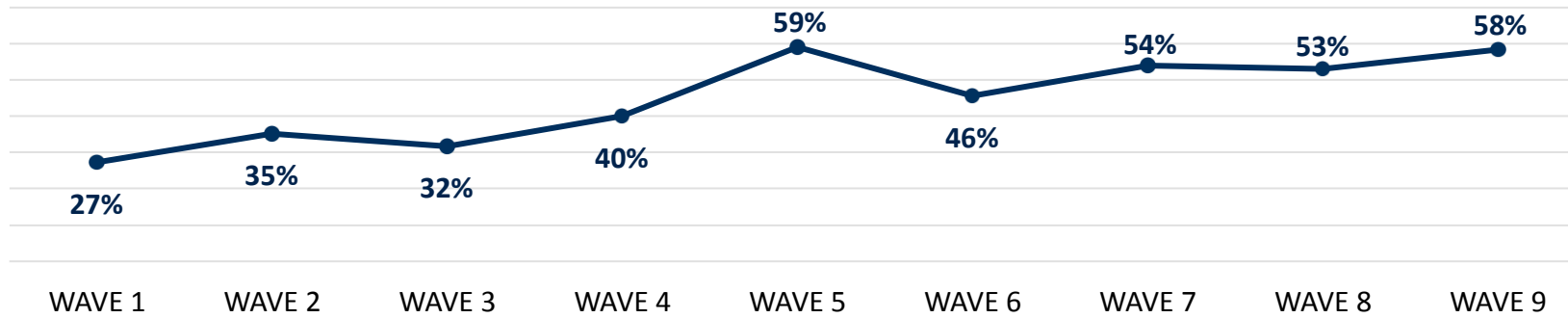
WHAT DOES THE LATEST BAROMETER DATA TELL US?



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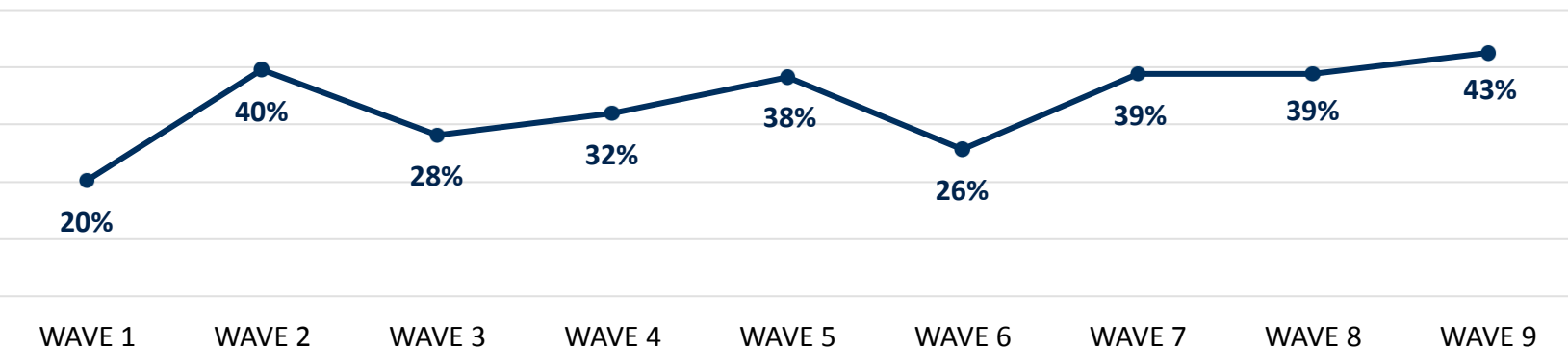
Growth in Participation and Anticipation Continues its Positive Trend

Played Golf Within The Past Two Weeks



Planning to Play Within The Next Week

Top 3 Box Summary



PLAYING MORE :

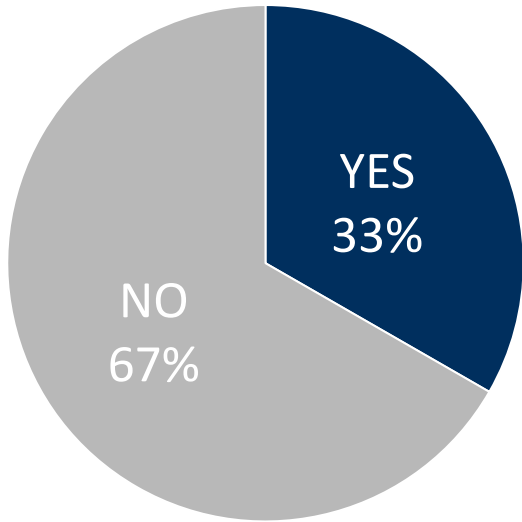
- Men
- Under age 65
- NorthEast and Western Census Regions
- HHI \$95k+
- Children in the household (HS)
- Republicans



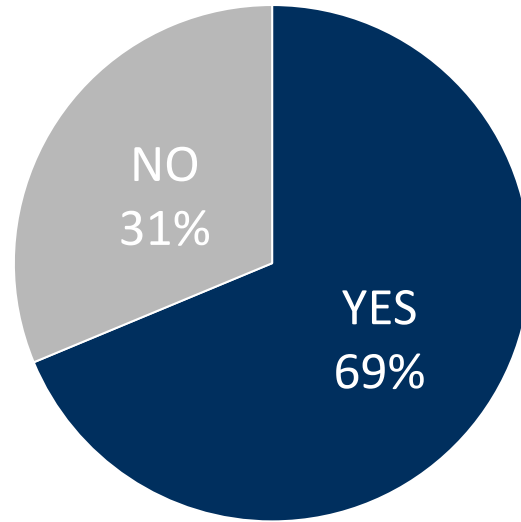
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The 80/20 Rule—Our Most Engaged Golfers are More Apt to be Playing

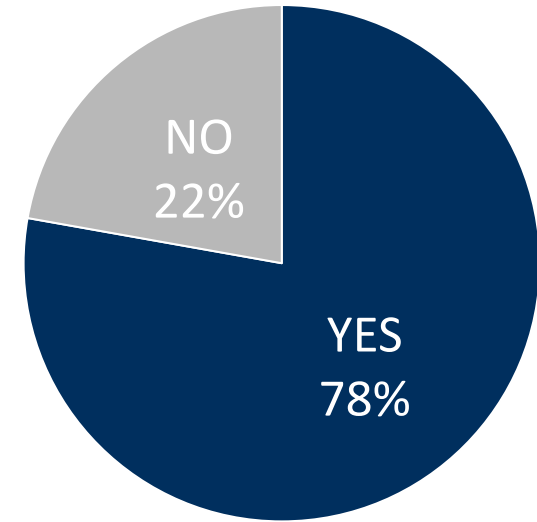
HAVE YOU PLAYED GOLF WITHIN THE PAST TWO WEEKS?



CASUAL



CORE



AVID

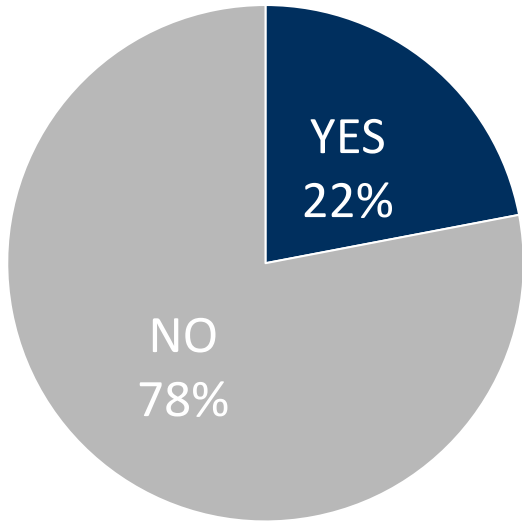


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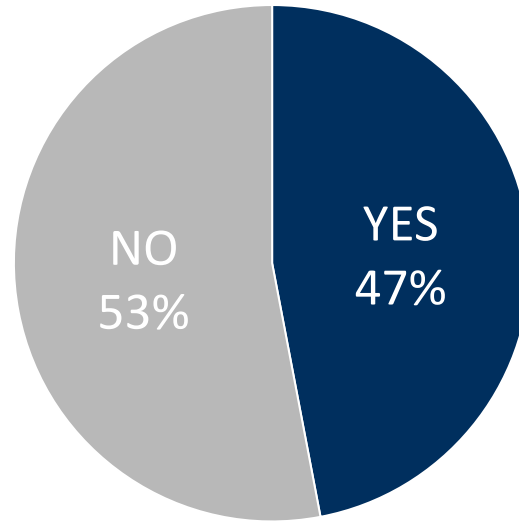
The 80/20 Rule—Our Most Engaged Golfers are More Apt to be Playing

I'M PLANNING TO PLAY IN THE NEXT WEEK

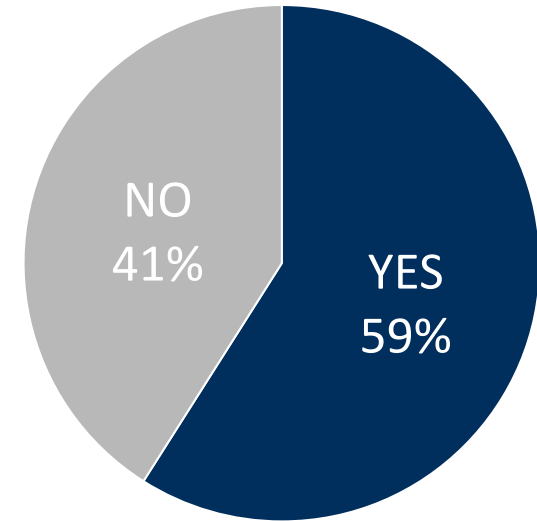
Top 3 Box Summary



CASUAL



CORE



AVID

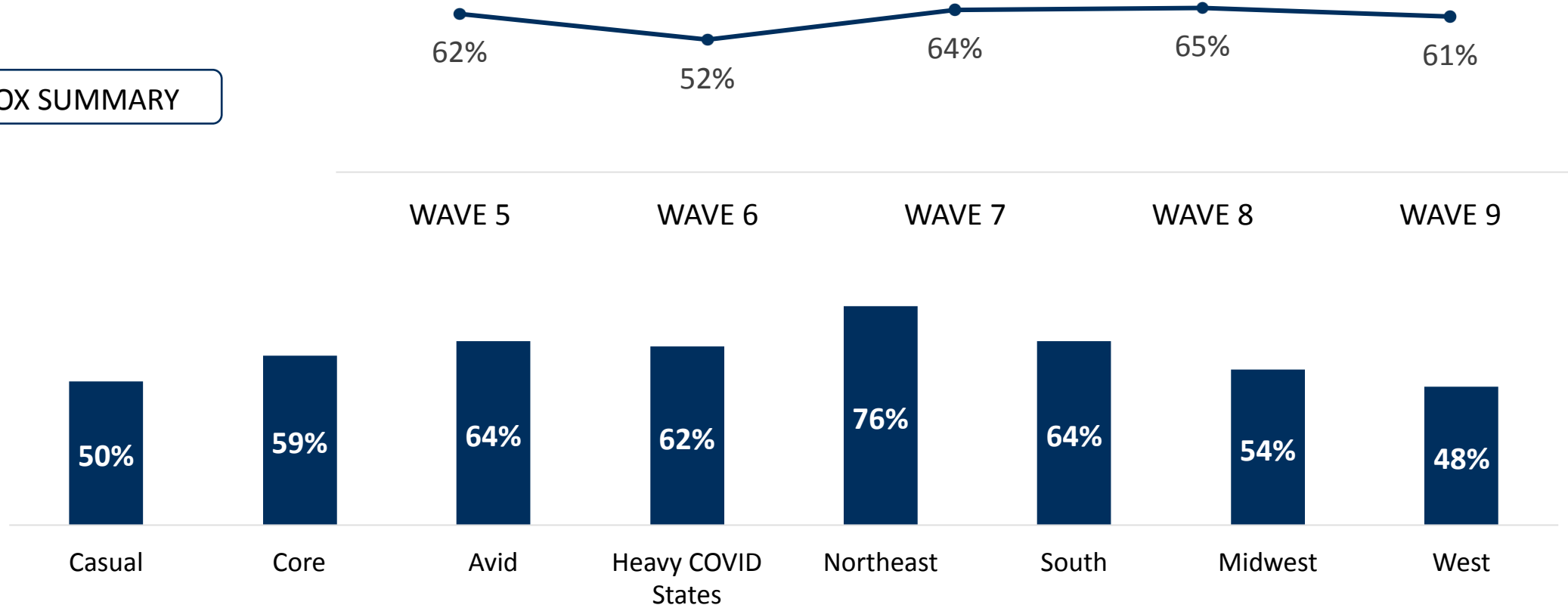


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Golf Facilities Have Done an Excellent Job of Meeting Golfer Expectations for Health Protocols

THE COURSE WHERE I MOST RECENTLY PLAYED, HAS DONE AN EXCELLENT JOB OF FOLLOWING NEW SAFETY AND SANITIZATION PROTOCOLS

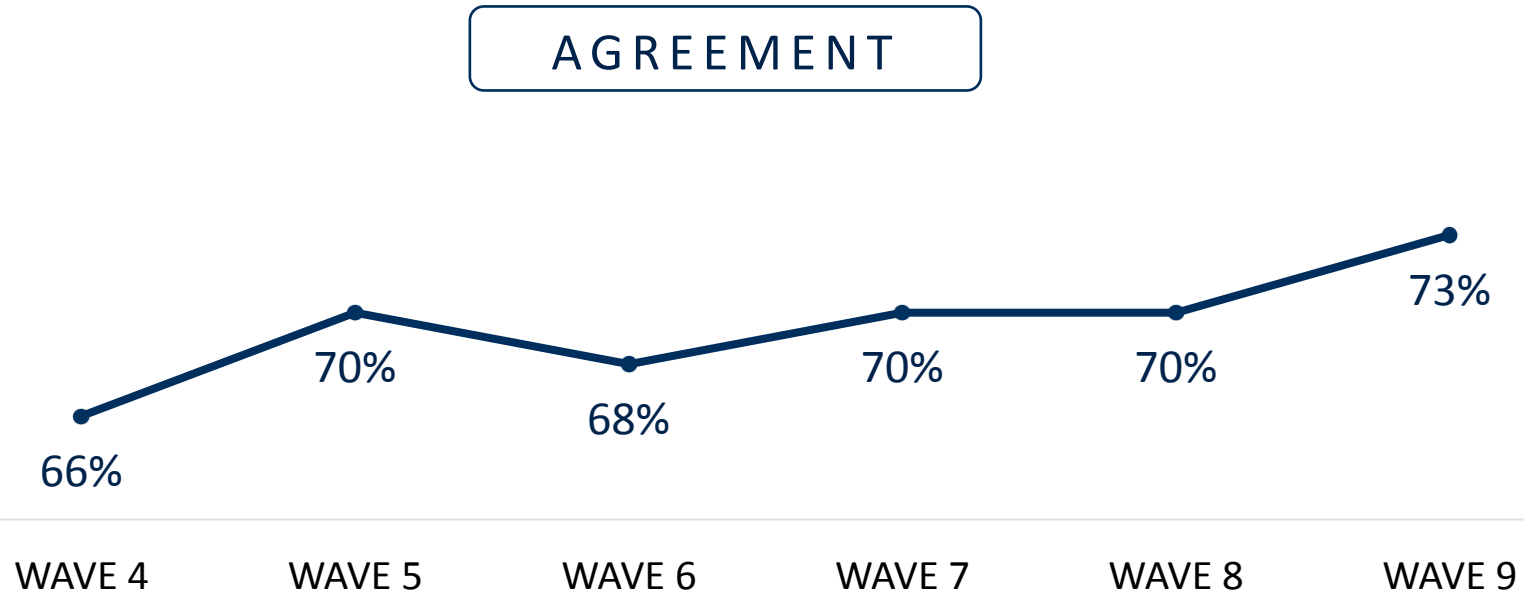
TOP 3 BOX SUMMARY





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Golf Has Been An Oasis from the Chaos for a Majority of Golfers During the Pandemic





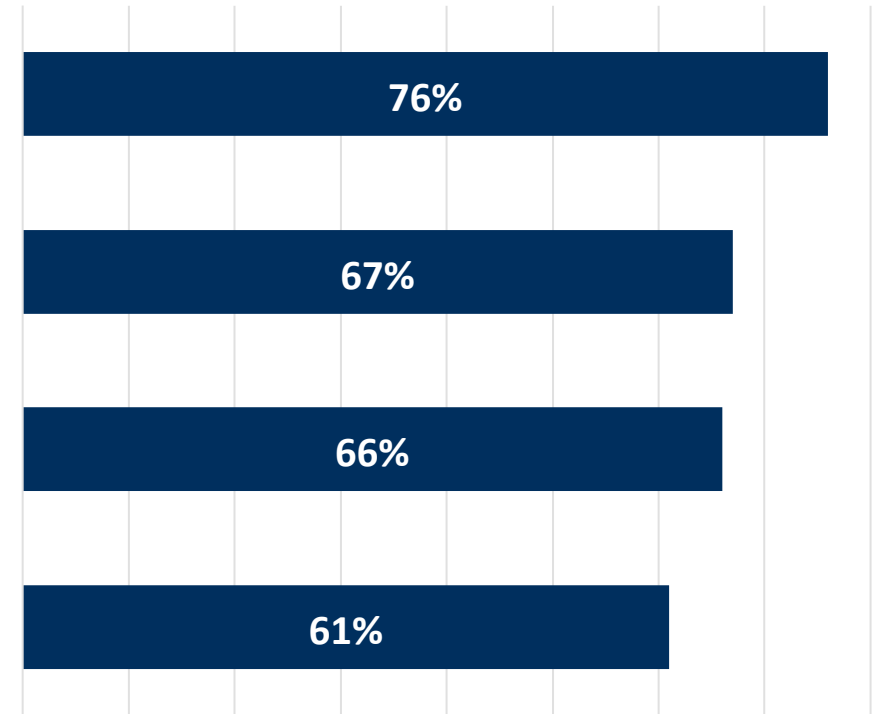
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Golfers Recognize the Game's Health Benefits and it is Leading to Greater Trial

AGREEMENT



- Golf is a more important part of staying healthy during the current pandemic
- People in general are playing more golf during the pandemic
- There are more golfers playing the game now, than there were at this time last year
- The golf course(s) where I play are very busy now

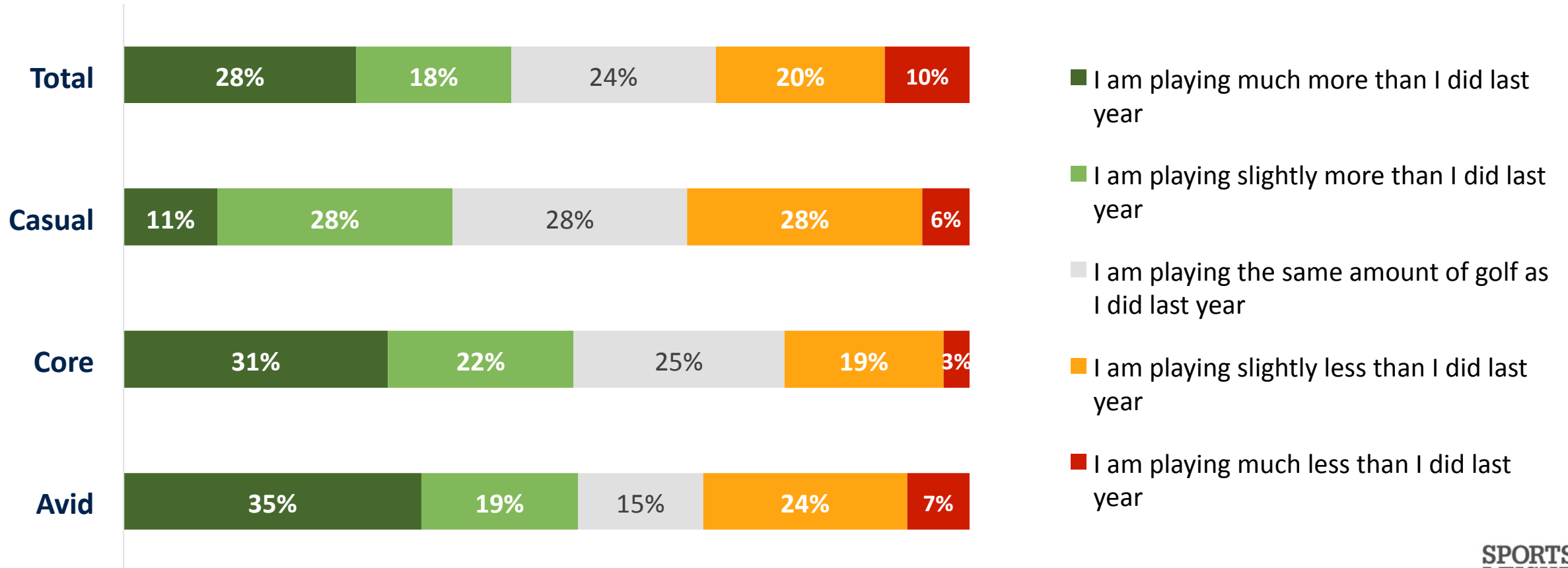




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Golfers are Self Reporting Comparatively Higher Rounds Per Capita Than A Year Ago

WHICH OF THE FOLLOWING BEST DESCRIBES YOUR GOLF ACTIVITY SINCE COURSES RE-OPENED IN YOUR AREA DURING THE PANDEMIC?





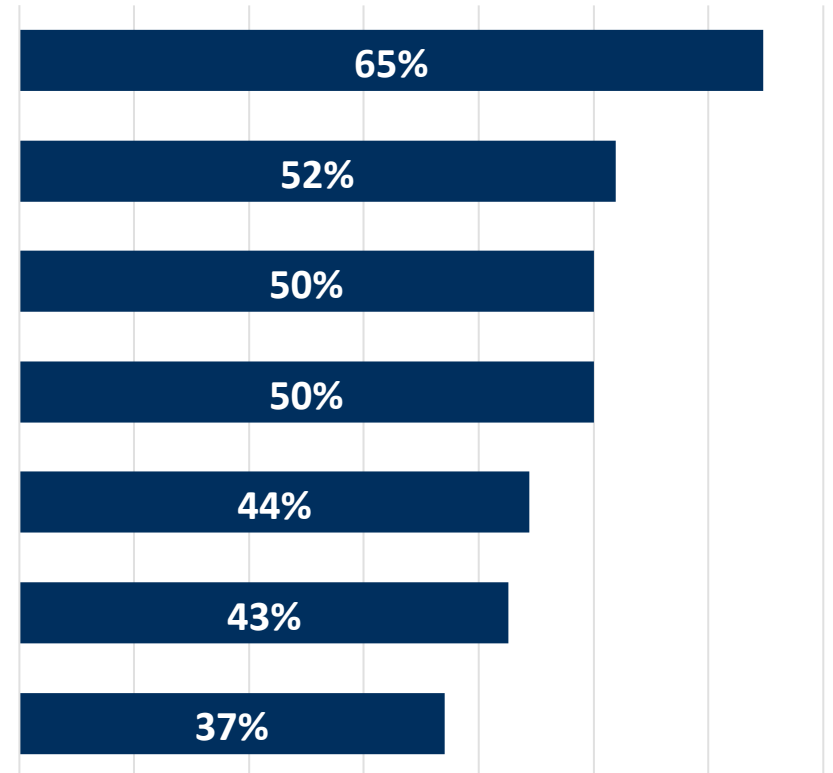
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Why Golfers are Playing More....It's Situation Specific

WHY ARE PEOPLE PLAYING MORE GOLF NOW?



- Golf is a safe activity during the pandemic
- There are fewer other sports that people can participate in
- People have more time on their hands in general
- Golf courses have done a great job of promoting the game
- Golf fills a void of available social activities
- The most passionate players are valuing the sport even more, now, during these trying times
- People who don't normally play golf are seeking it out as a form of exercise

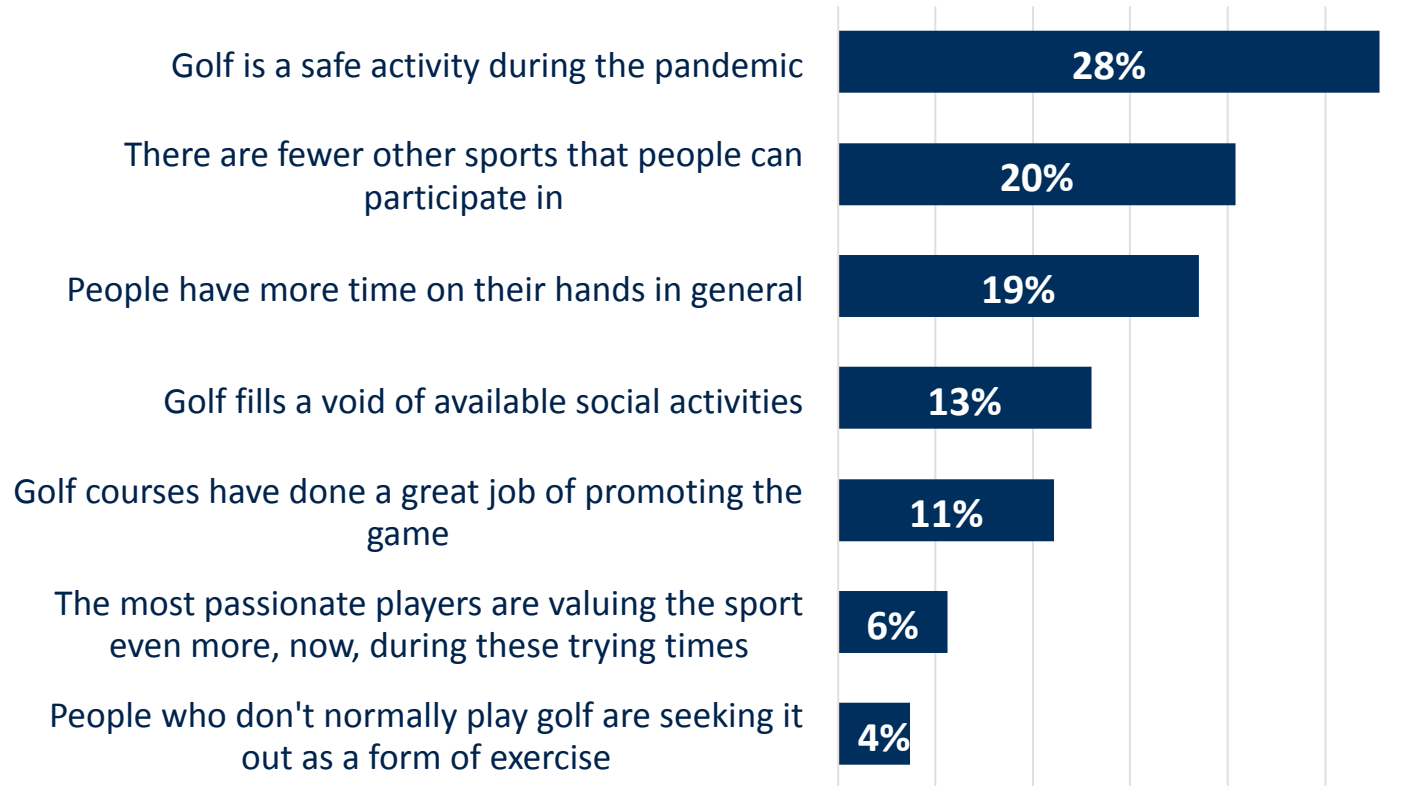




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Why Golfers are Playing More....It's Situation Specific

AND WHICH OF THESE, DO YOU FEEL IS THE **MOST SIGNIFICANT REASON** WHY PEOPLE ARE PLAYING MORE GOLF?

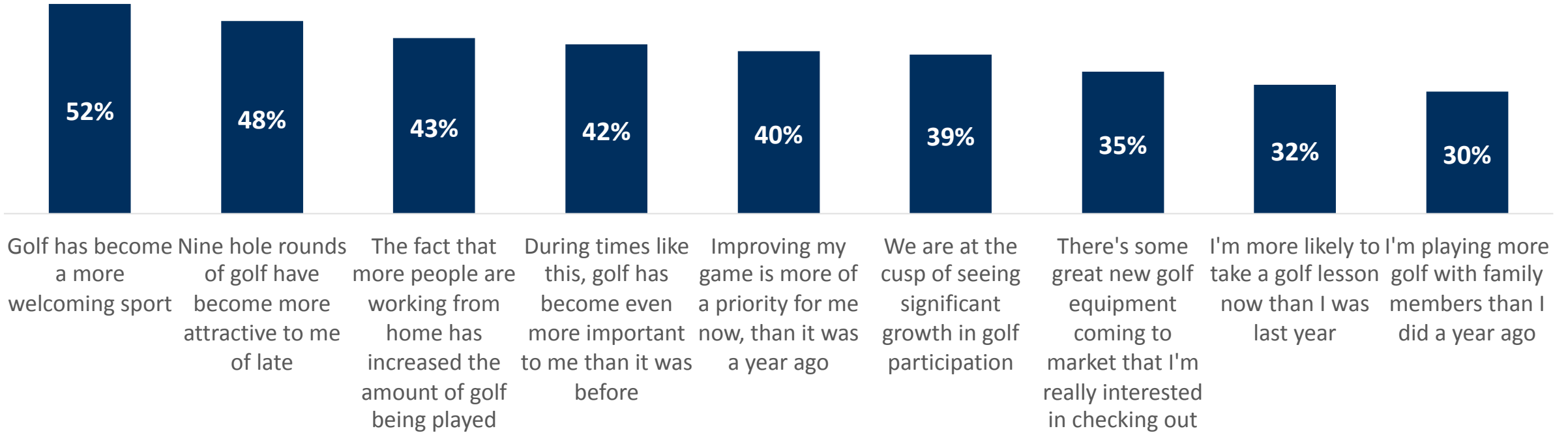




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A Closer Look at Attitudes About the Game Reveal Opportunities and Surface Questions

TOP 3 BOX AGREEMENT

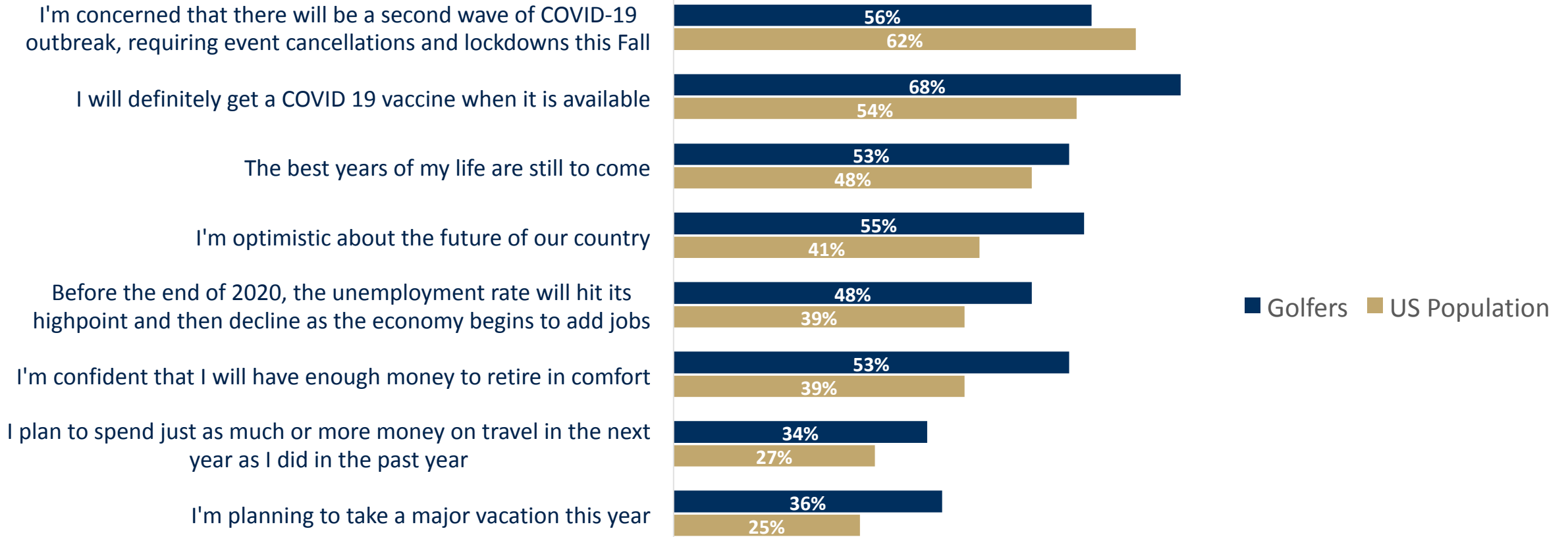




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Golfers Continue to Show Greater Overall Resilience and Optimism vs. the U.S. Population in Total

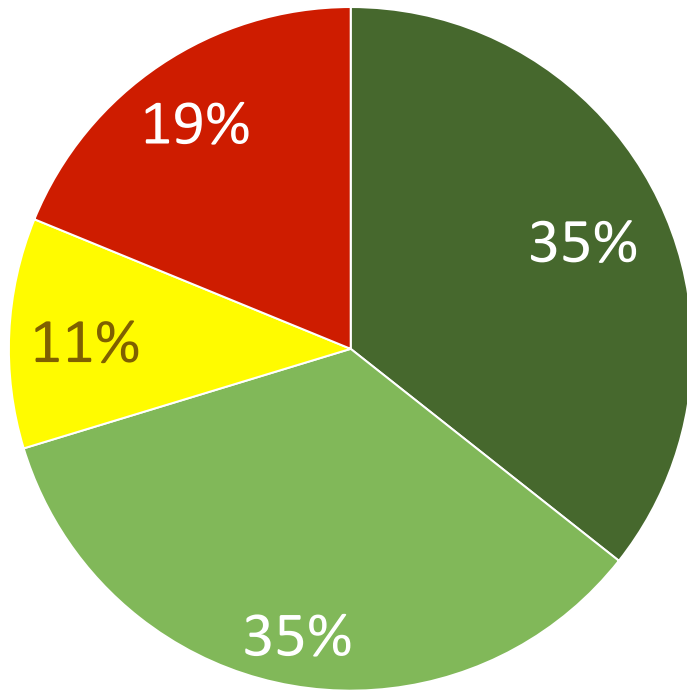
TOP 3 BOX AGREEMENT





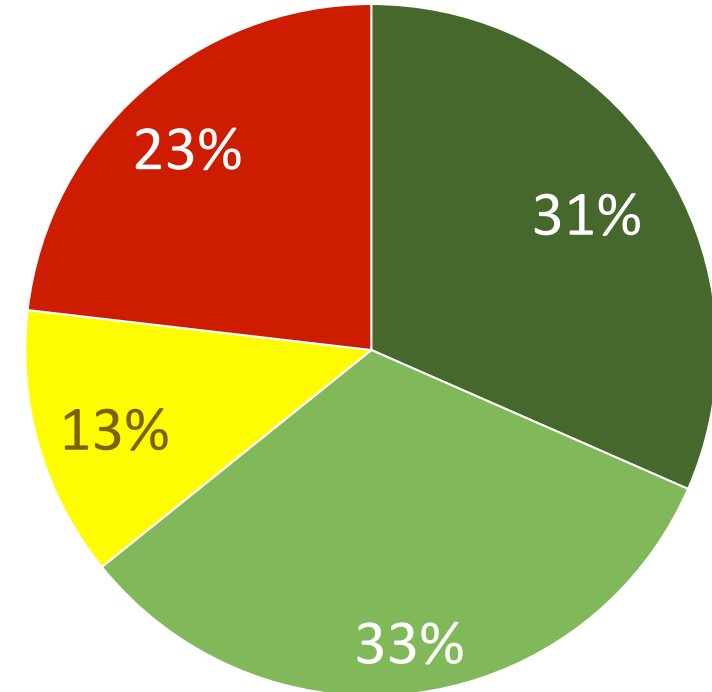
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Golfers Are More Likely to be “Recently Active” or “Ready to Go” vs. Sports Fans



GOLFERS

- Recently Active
- Ready to Go
- Assurance Seekers
- Need Medical Breakthrough



SPORTS FANS



SHORT TERM



- A Significant Opportunity to Create Enduring Connections
 - Strike while the iron is hot

LONG TERM



- Remember the Short Lived Tiger Boom
 - Be welcoming and create the right experience
 - Connect with your customers
 - Think broadly about the competitive set



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