



Brand Share Index from SBRnet

GOLF

highlights

Introduction

- SBRnet's annual fan market study has continually provided extensive marketing, media, sponsorship and demographic analytics for sports fans within 13 separate sport categories: NBA, NHL, MLS, NFL, MLB, College Football, College Basketball, NASCAR, Golf, Tennis, Running, MMA and Soccer-non-USA since 2011.
- Beginning with our 2015 survey, the survey has been expanded to include consumer brand preferences for 15 product categories including Automobiles, Automobile/Truck Insurance, Basketball Shoes, Brokerage Services, Cell Phones, Cell Phone Services, Credit Cards, Cross Training/Fitness Shoes, Domestic Airlines, Energy Drinks, Rental Car Agencies, Running Shoes, Soft Drinks, Sports Drinks, and Tablet Computers.
- As a result, SBRnet's **Brand Share Index (BSI)** has been created. It is unique set of calculations reflecting the relationship between (a) brand preferences of all fans in a particular sport category and (b) preferences among fans for a particular brand in a particular market segment, such as fans who attend games, frequent TV viewers, streamers, Facebook (or Twitter) followers, several demographic segments, sponsorship influence, attendance, fantasy sports involvement and favorite sports teams.

continued...

Introduction (continued)

- Each BSI report for a sport category report is divided into two sections, “Highlights” and “Index.” Both sections are posted online, each with a separate link, and can be accessed directly from the “Brand Share-of-Market” link in the top navigation bar.
- The “Highlights” section of each sport category report contains a series of summary charts including fan market size, demographics and leading brand preferences for each of 15 consumer products
- The “Index” section contains a series of three statistical tables, in Excel Spreadsheet format. Each brand’s share of market is reported for all fans in the sport category as well as for a wide range of demographic and market segments. The Brand Share Index reflects the relationship between the brand’s share among all fans vs. the brand’s share among fans in a particular segment. Here are the segments reported separately within each of the three statistical tables.
 - **DEMOGRAPHICS** (Age, Gender, Annual HH Income, Geographic Region)
 - **ATTEND/VIEW** (Total Attend, Total view on TV, Total view 2+ times on TV, Total view online, Total view 2+ times online, Total use Facebook, Total follow daily on Facebook, Total follow on Twitter, Total follow daily on Twitter, purchased logo apparel Total, Under \$50, \$50-9, \$200+, total claim to be influenced to buy products advertised on sports, total claiming not to be influenced, Fantasy Sports – short term and long term players, prefer FanDuel, prefer DraftKings)
 - **FAVORITE TEAMS** (Top 3 most popular NFL, NBA, NHL, MLB teams, several leading popular college teams, and each Power 5 Conference)

Benefits

- **How do rightsholders and sponsors benefit from BSI reports?**
 - **SPONSORSHIP SOLICITATION**
 - BSI gives rightsholders vital information in advance about a potential sponsor that enables them to respond more effectively to the needs of that sponsor;
 - BSI gives sponsors vital information in advance about a range of potential rightsholders helping them choose the rightsholder that best meets their specific needs.
 - **SPONSORSHIP ACTIVATION**
 - By comparing strengths and weaknesses of their respective demographics and media exposure, sponsors and rightsholders can develop the most effective media and marketing strategies for the sponsor's particular product.

Research Methodology

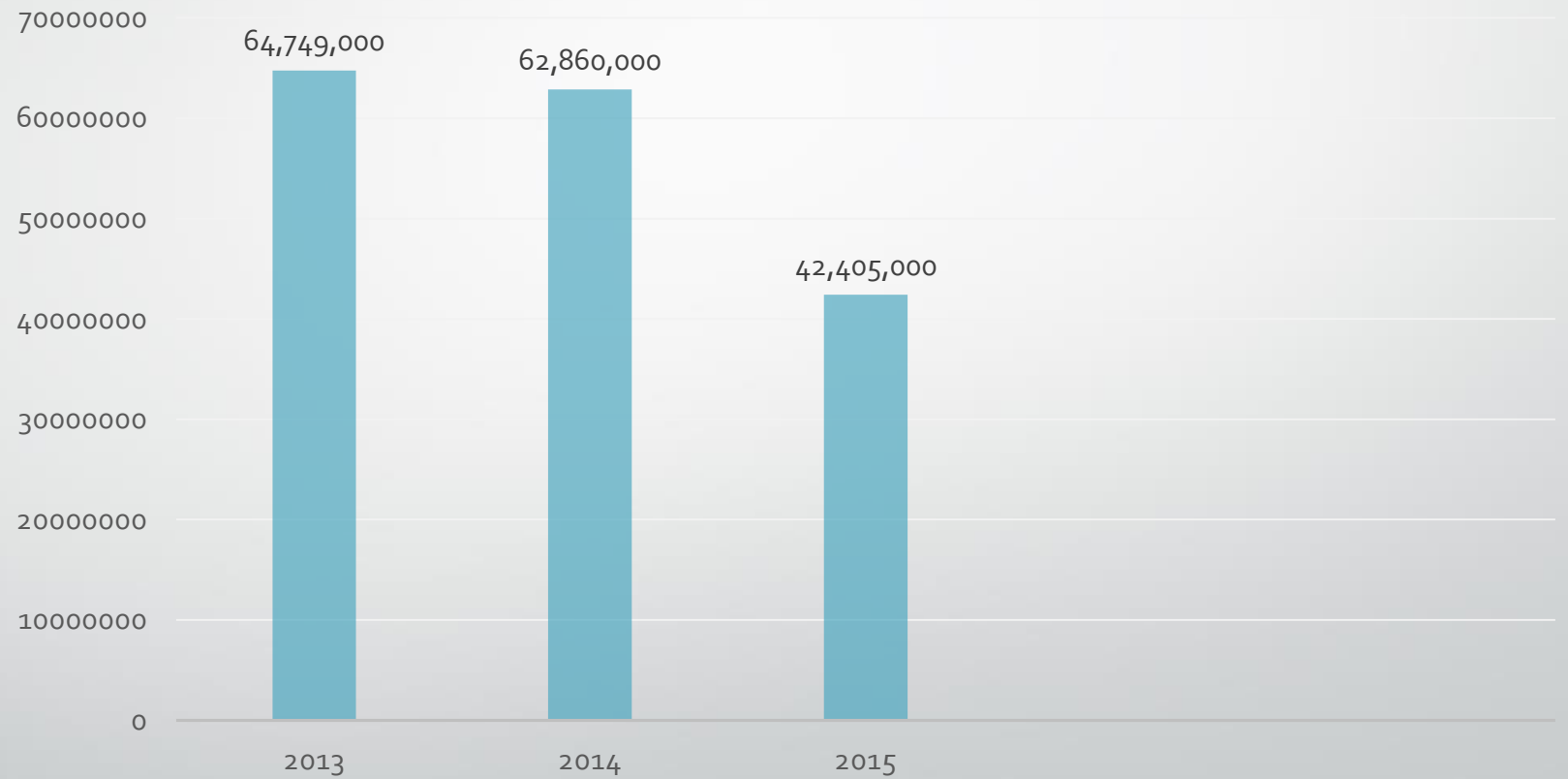
- BSI data are drawn from an annual consumer study of fans of 17 professional and college sport categories attended or viewed from October to September. The surveys are conducted online each year in October among a representative panel of U.S. consumers age 13 or older. Over 70,000 panel members receive an email invitation with a link to complete the survey.
- Each respondent reports on their attendance or viewership (on television, computer/laptop/netbook, tablet, or a smart phone) over the past year, along with a wide range of demographics and fan activity. Demographics covered include age, gender, annual HH income and geographic region. Fan-related activities covered include, but aren't necessarily limited to the place of purchase and amount spent on related sports apparel, participation in sports, sponsorship influence, brand preferences for a wide range of consumer products, sports-related activities on computers and mobile devices, social media usage, fantasy sports involvement, and their favorite professional and college teams.
- The data is weighted to represent the demographic composition of the continental U.S. based households on the following five characteristics: geographic region, income, household size, age and gender.
- Residents of Alaska and Hawaii were not included in this survey. The data is also weighted to the current year's U.S. population of individuals age 13 or older.
- With regard to geographic region, the tables in this report show the demographic distribution of participants for each sport by the four major census regions. The states in the geographic regions reported are:
 - Northeast: New England: CT, RI, MA, NH, VT, ME; Middle Atlantic: PA, NY, NJ
 - Midwest: East North Central: OH, MI, IN, IL, WI; West North Central: NE, IA, MN, ND, SD, KS, MO
 - South: South Atlantic: MD, DC, NC, SC, FL, GA, VA, WV, DE; East South Central: TN, KY, MS, AL; West South Central: OK, TX, LA, AR
 - West Pacific: CA, OR, WA; Mountain: AZ, CO, NM, ID, UT, WY, MT, NV
- These regions are the same as those used by the U.S. Bureau of the Census, except Alaska and Hawaii are not included.
- Brand information for consumer products was first obtained in the 2015 study, the availability of which has evolved into BSI's creation and development.

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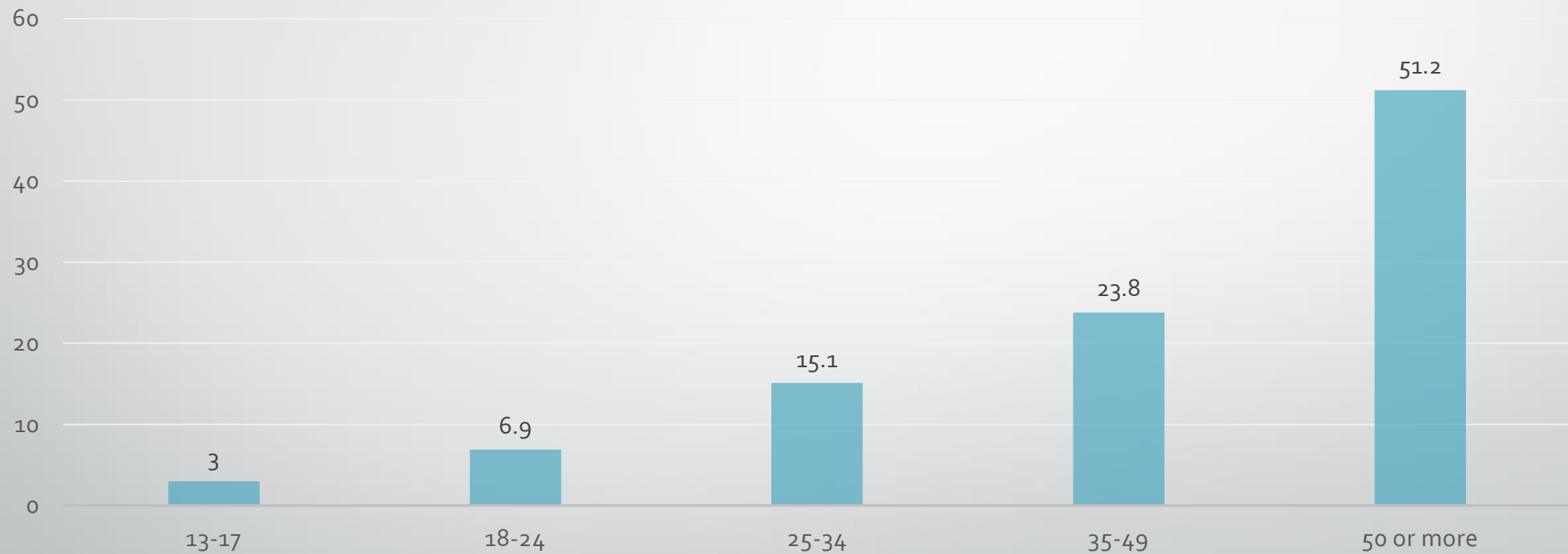
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Trends in Number of Golf Fans* Age 13+

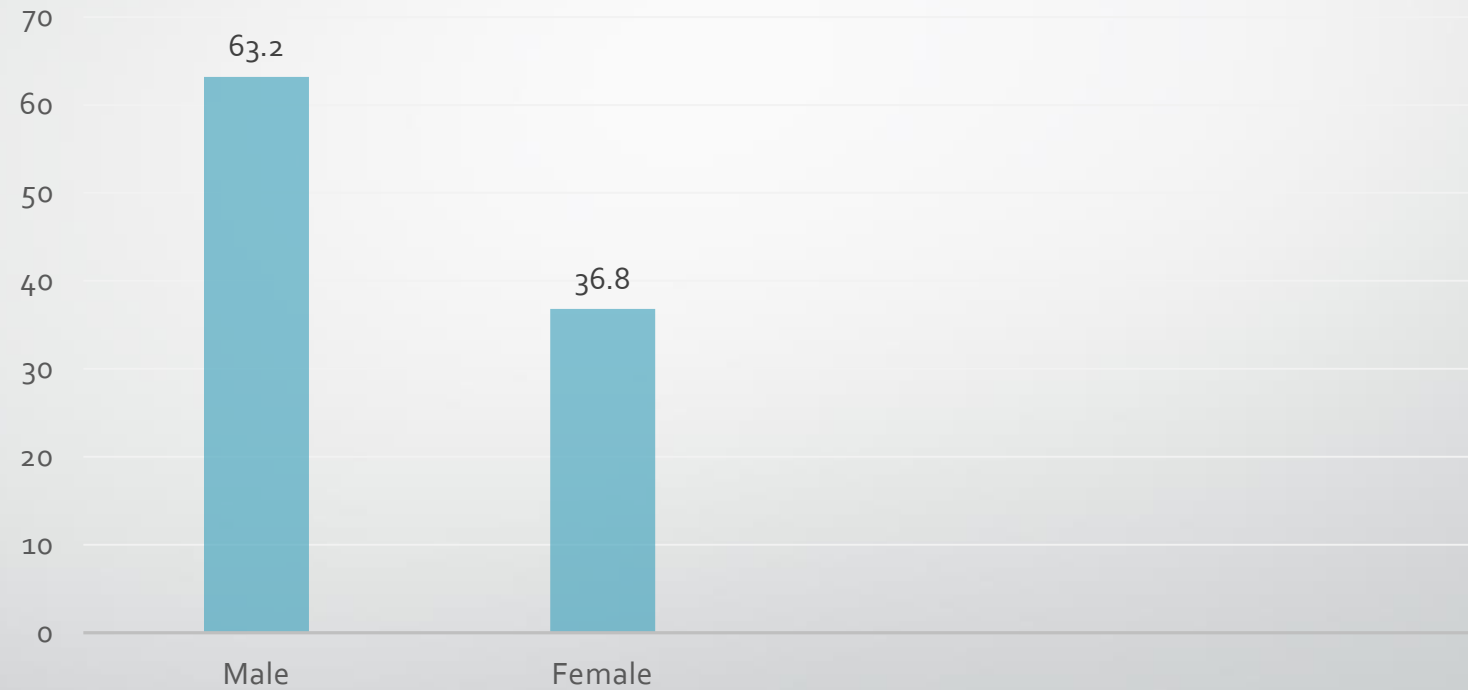
(*Number attended/viewed on TV or online at least once during the year)



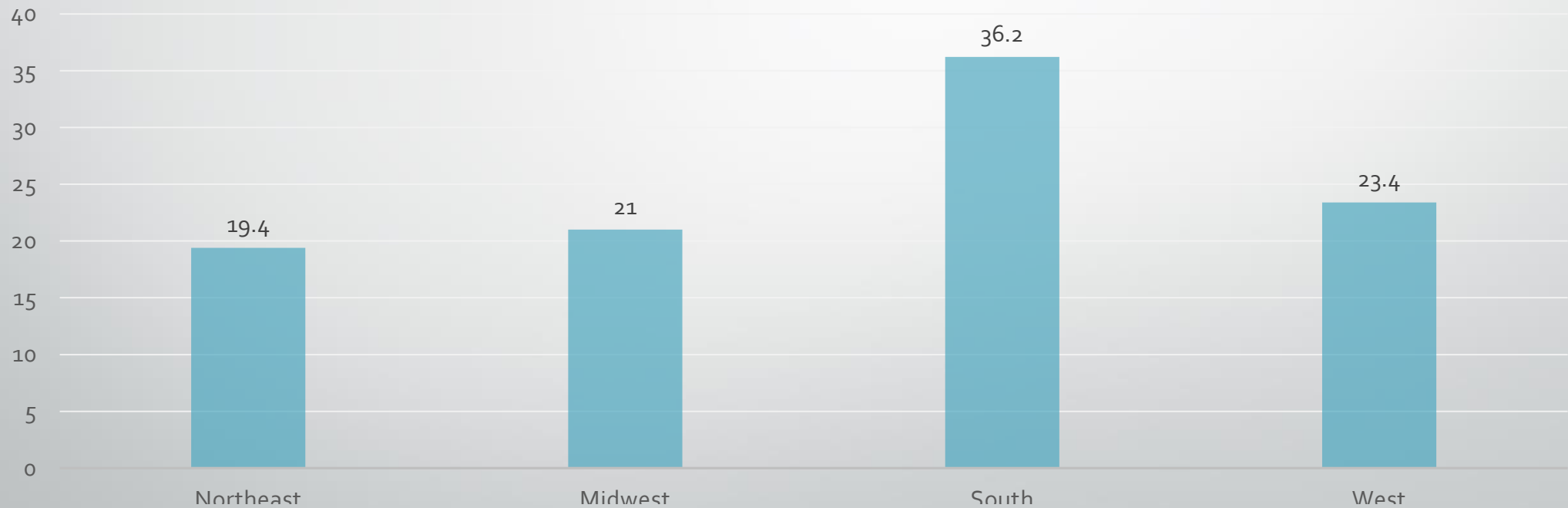
% of Golf Fans in 2015 by Age Group



% of Golf Fans in 2015 by Gender



% of Golf Fans in 2015 by Geographic Region



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% of Golf Fans in 2015 by Annual Household Income

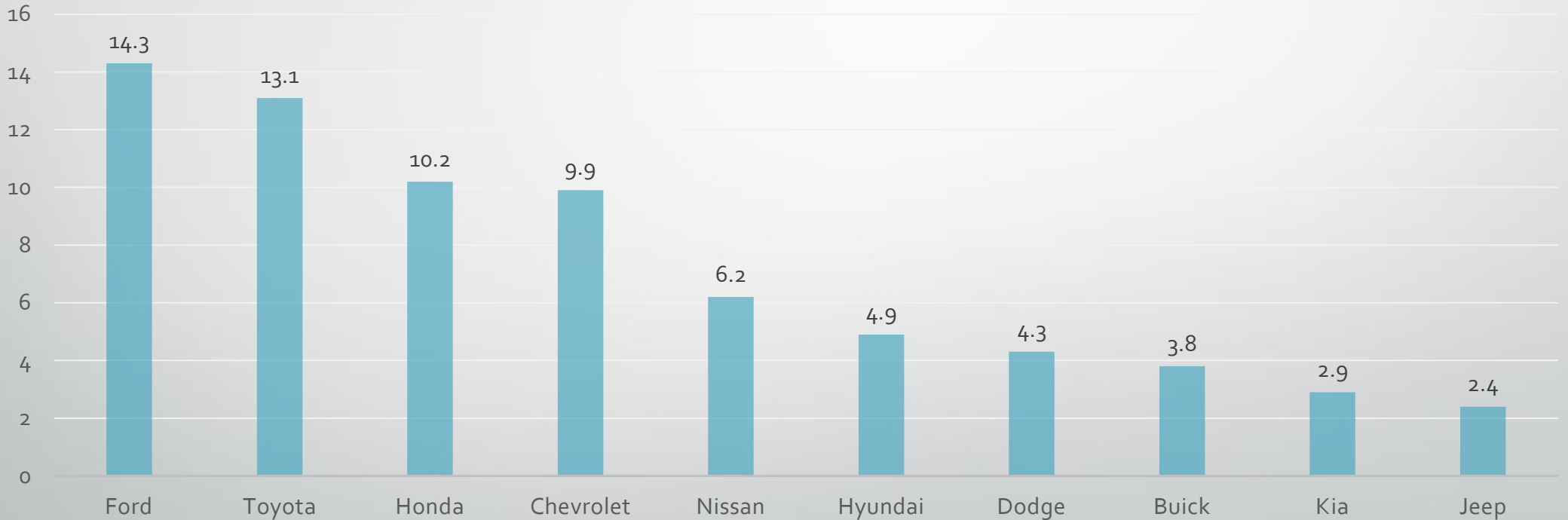


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Leading Brands: Consumer product categories measured

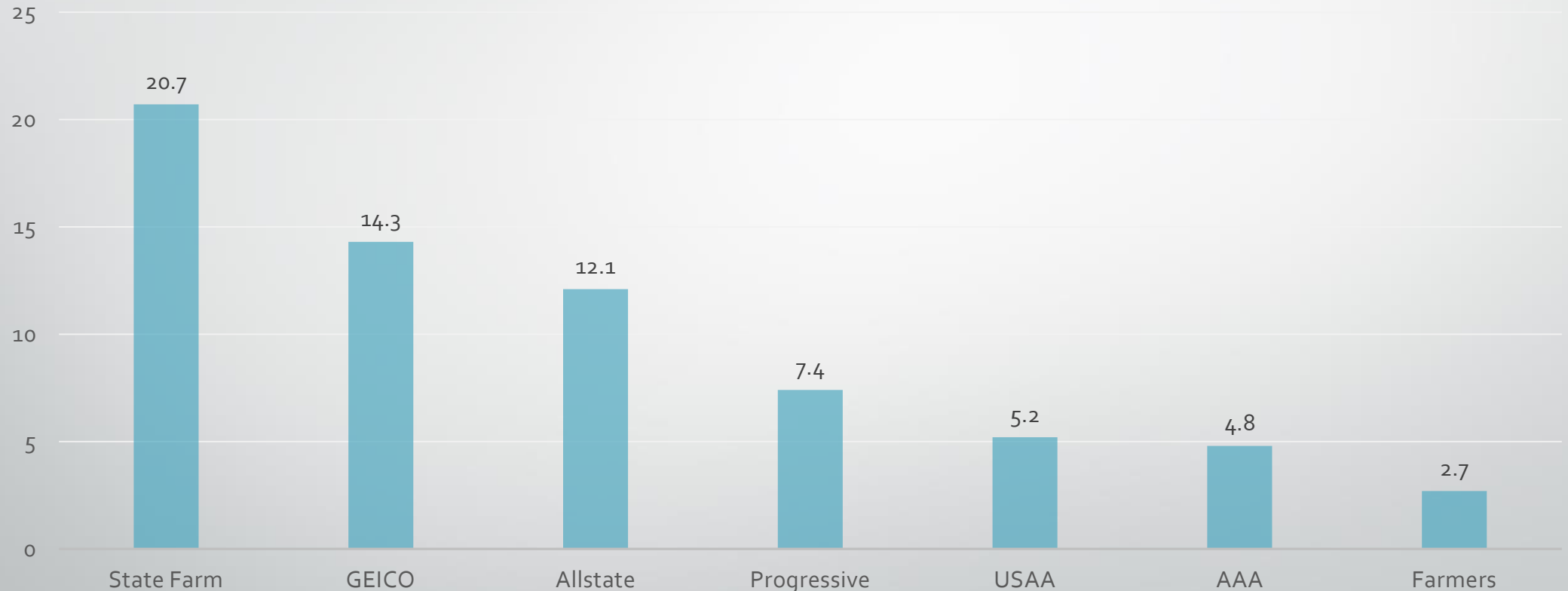
- Automobile/Truck
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- Credit Cards
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- Domestic Airlines
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- Running Shoes
- Soft Drinks
- Sports Drinks
- Tablet Computer

Top 10 Brands: Automobile/Trucks (% of Golf fans in 2015 driving brand most often)



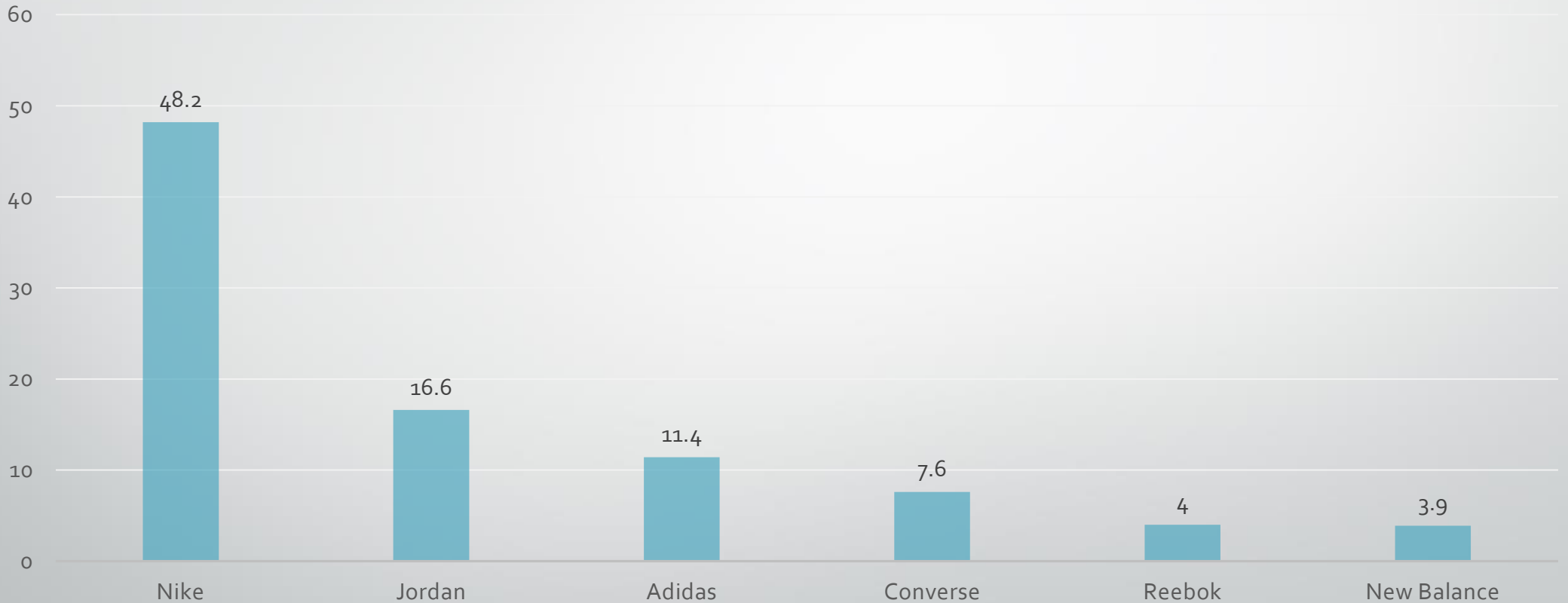
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Leading Brands: Automobile/Truck Insurance (% of Golf fans in 2015 using brand)

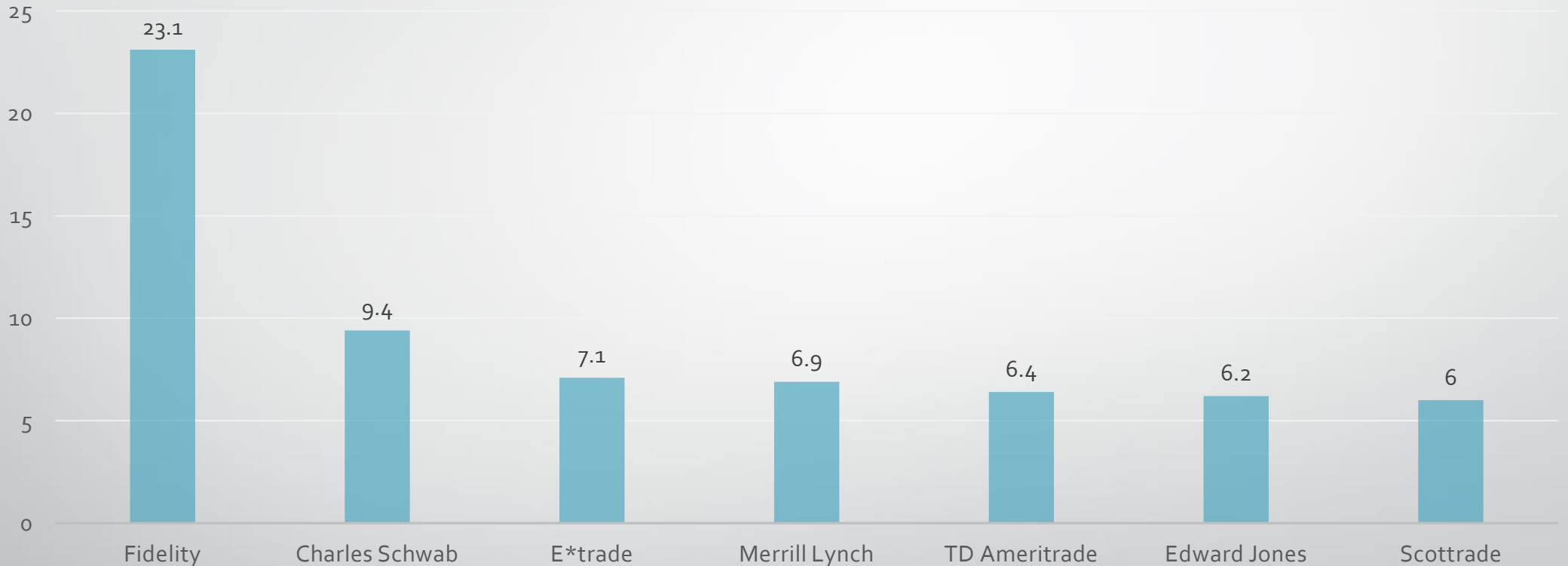


Leading Brands: Basketball Shoes

(% of Golf fans in 2015 wearing brand most often)

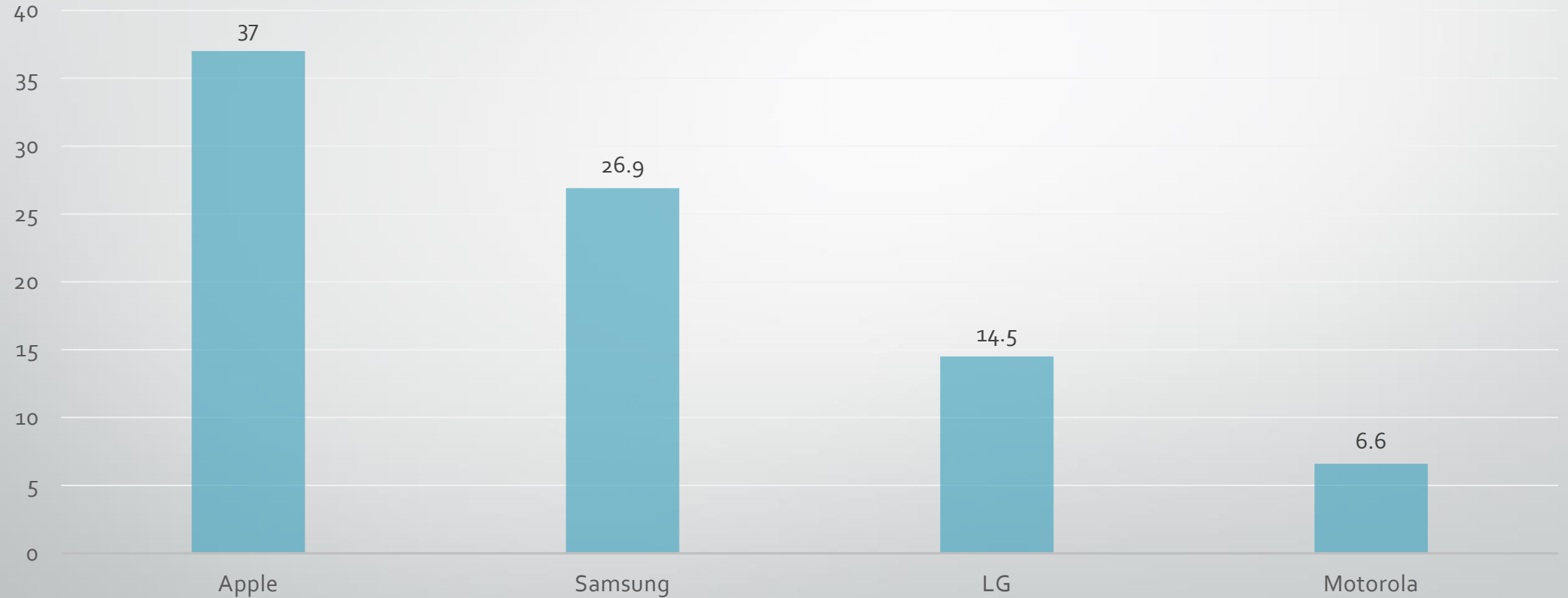


Leading Brands: Brokerage Services (% of Golf fans in 2015 using brand most often)

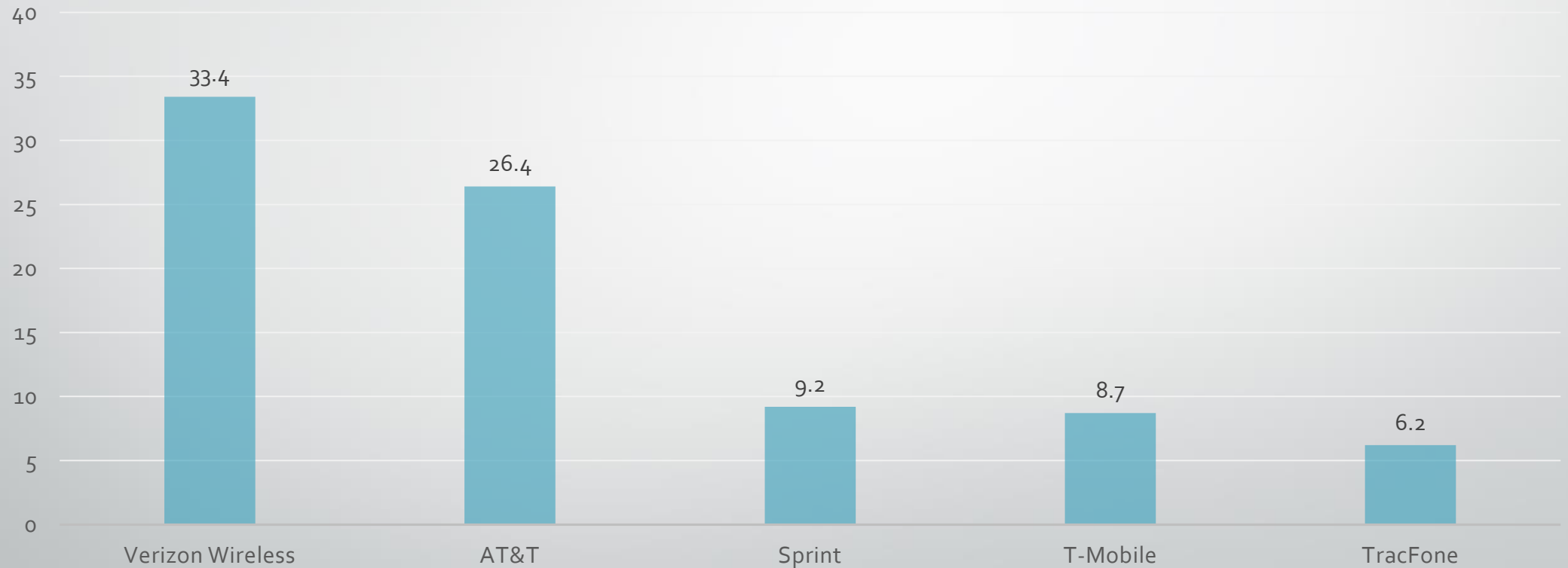


Leading Brands: Cell Phones

(% of Golf fans in 2015 owning cell phone)

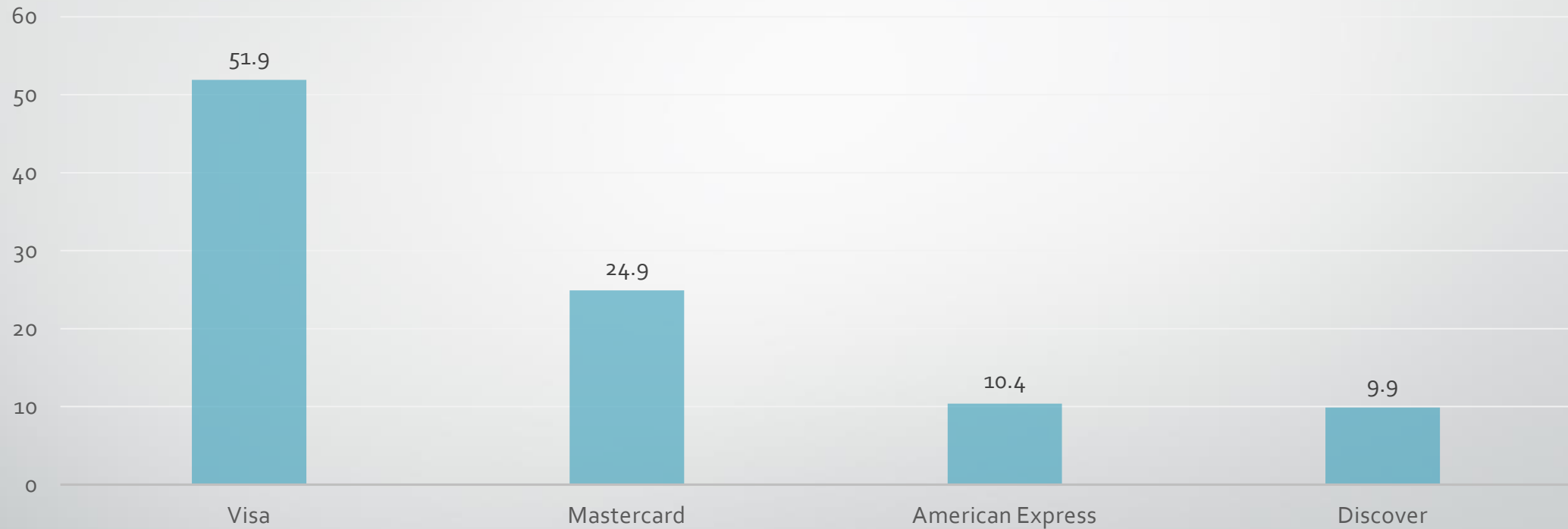


Leading Brands: Cell Phone Communication Services (% of Golf fans in 2015 owning cell phone)

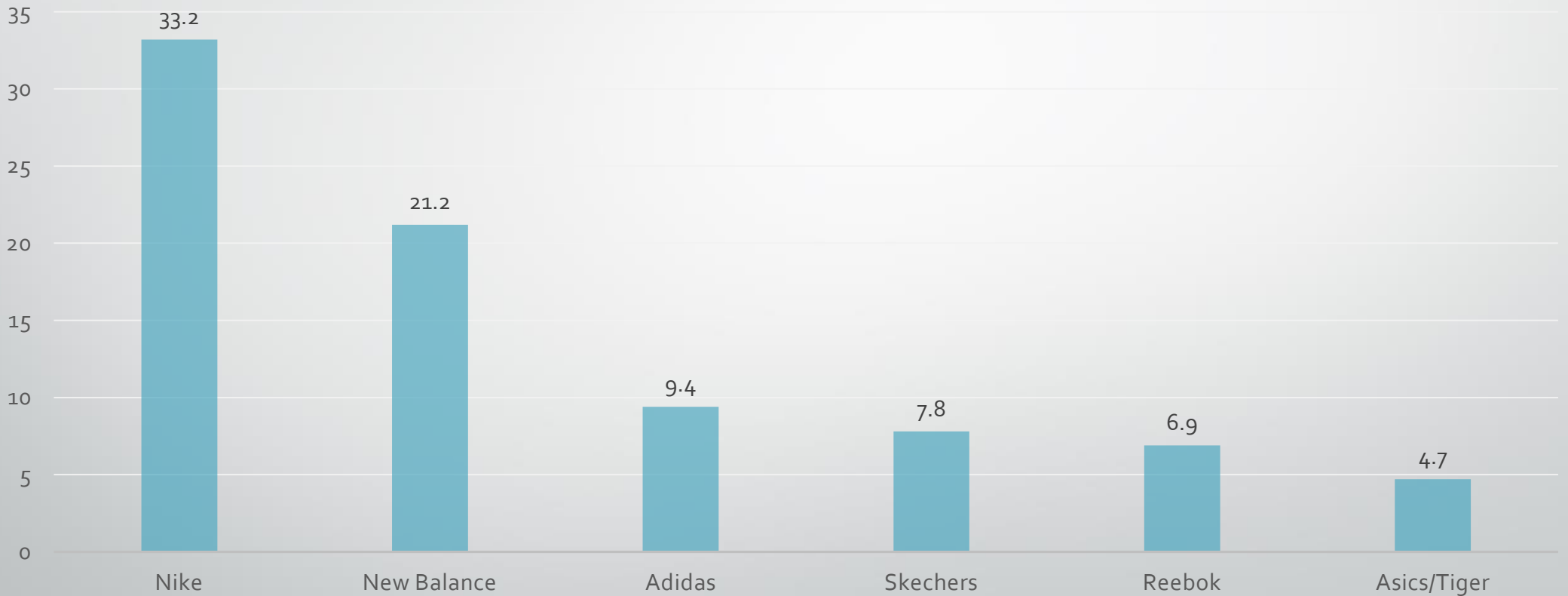


Leading Brands: Credit Cards

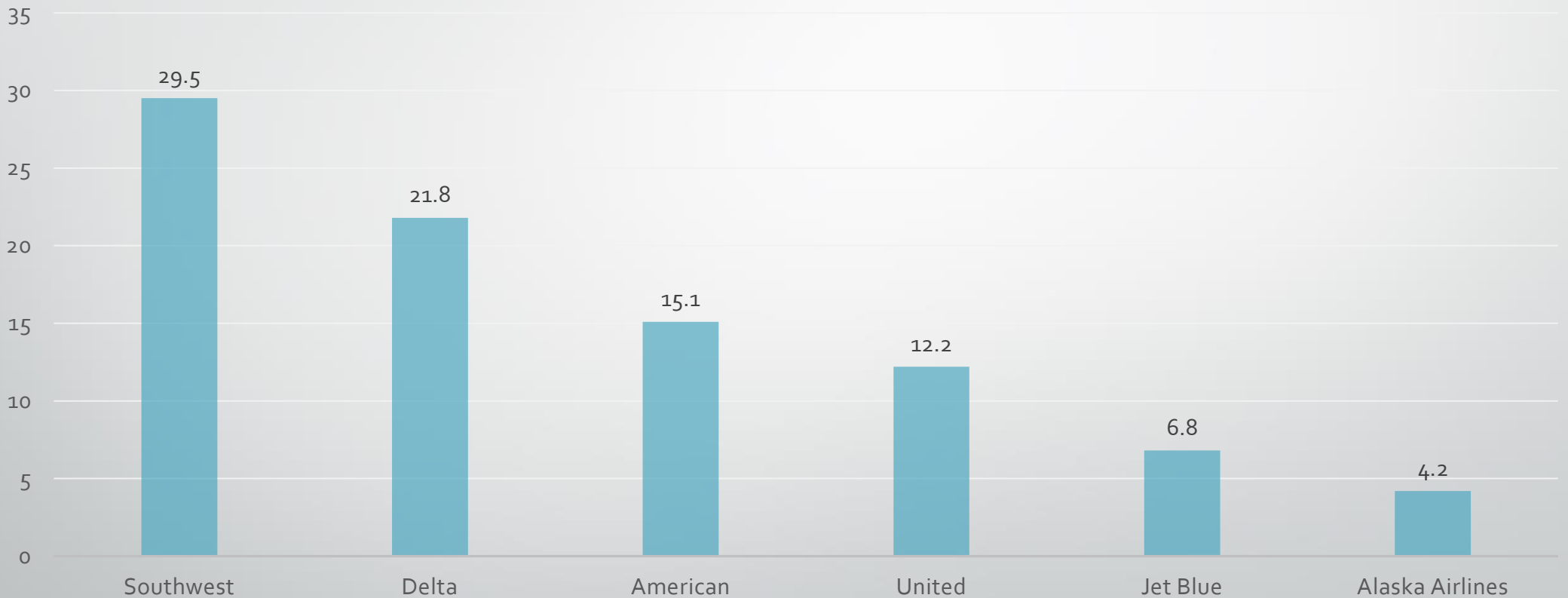
(% of Golf fans in 2015 using brand most often)



Leading Brands: Cross Training/Fitness Shoes (% of Golf fans in 2015 wearing brand most often)



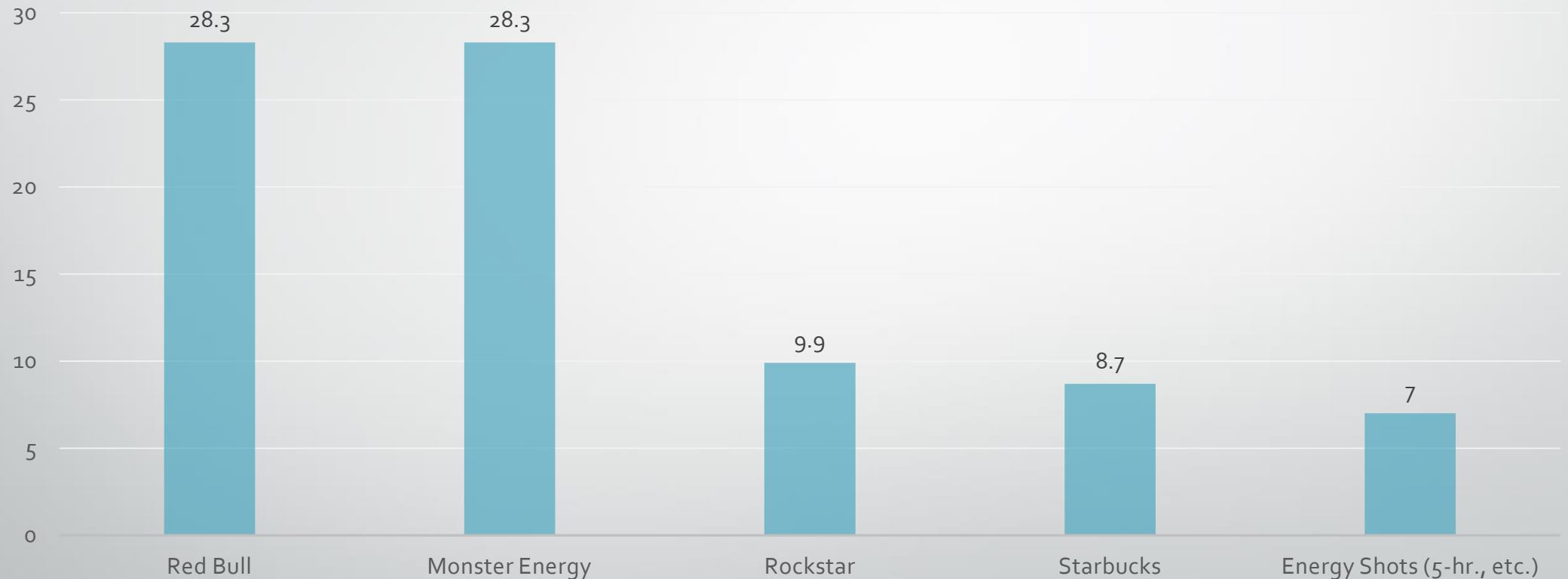
Leading Brands: Domestic Airlines (% of Golf fans in 2015 fly most often)



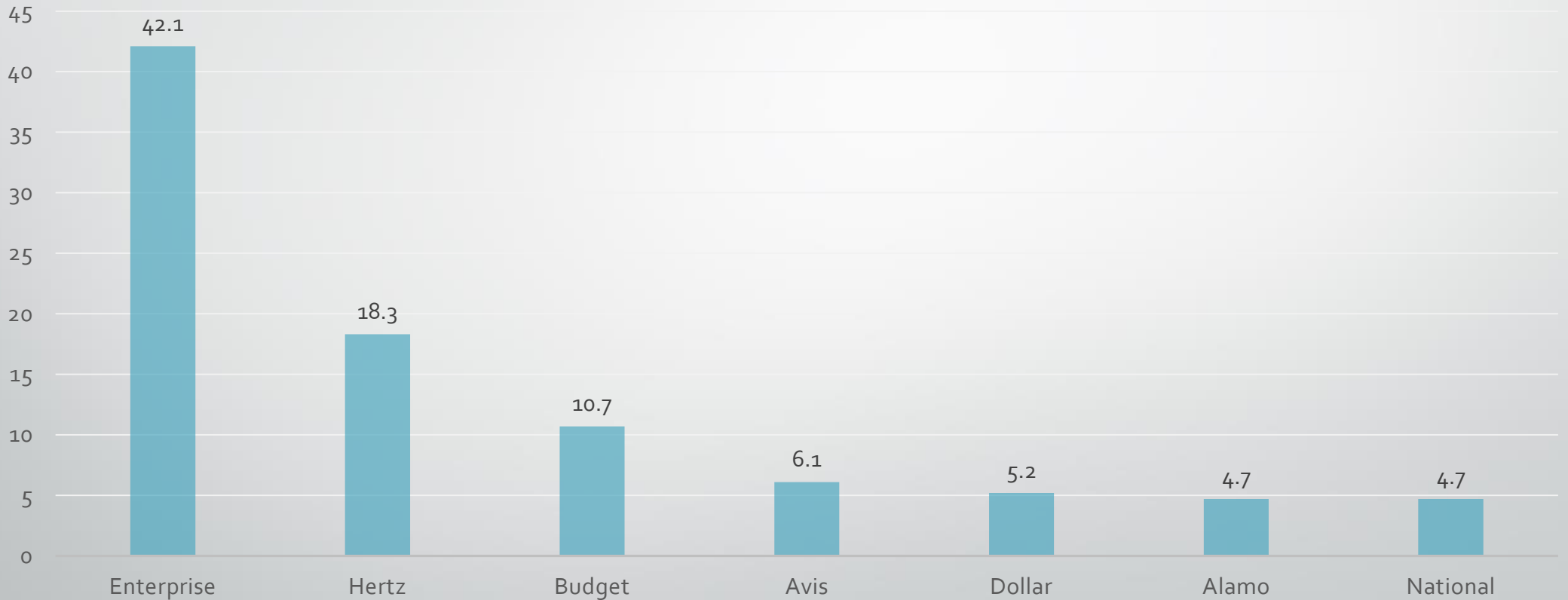
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Leading Brands: Energy Drinks

(% of Golf fans in 2015 drinking brand most often)



Leading Brands: Rental Car Agencies (% of Golf fans using most often)



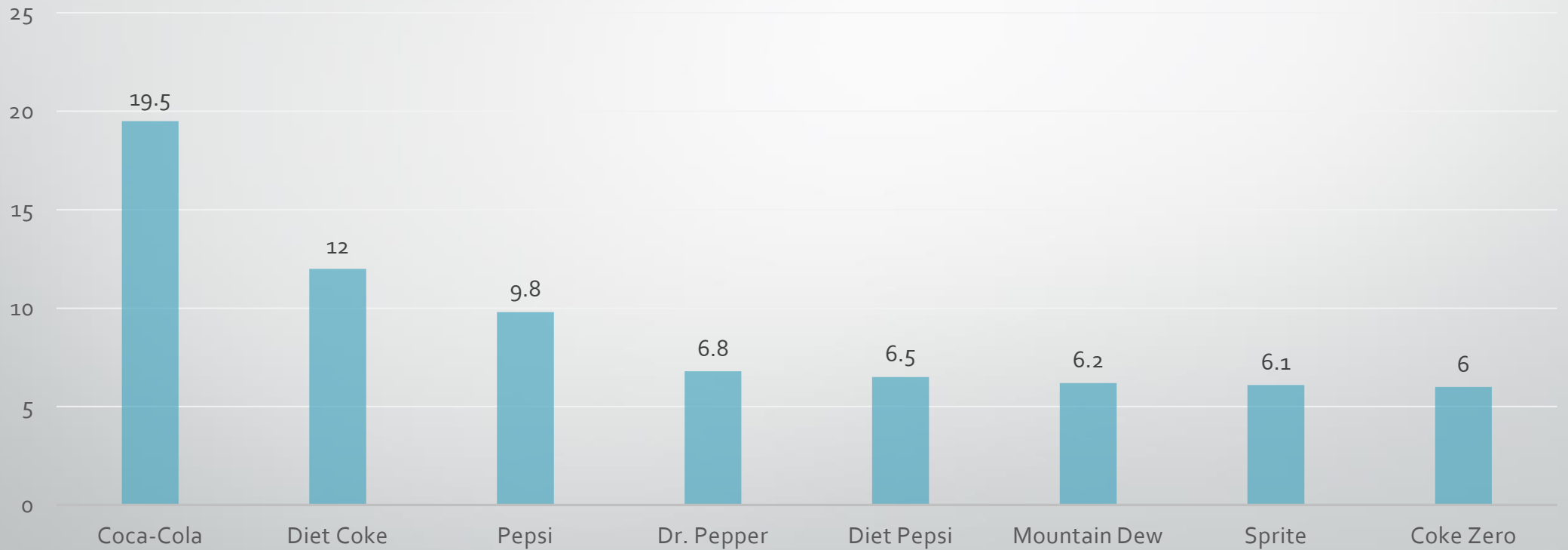
Leading Brands: Running Shoes

(% of Golf fans in 2015 wearing brand most often)



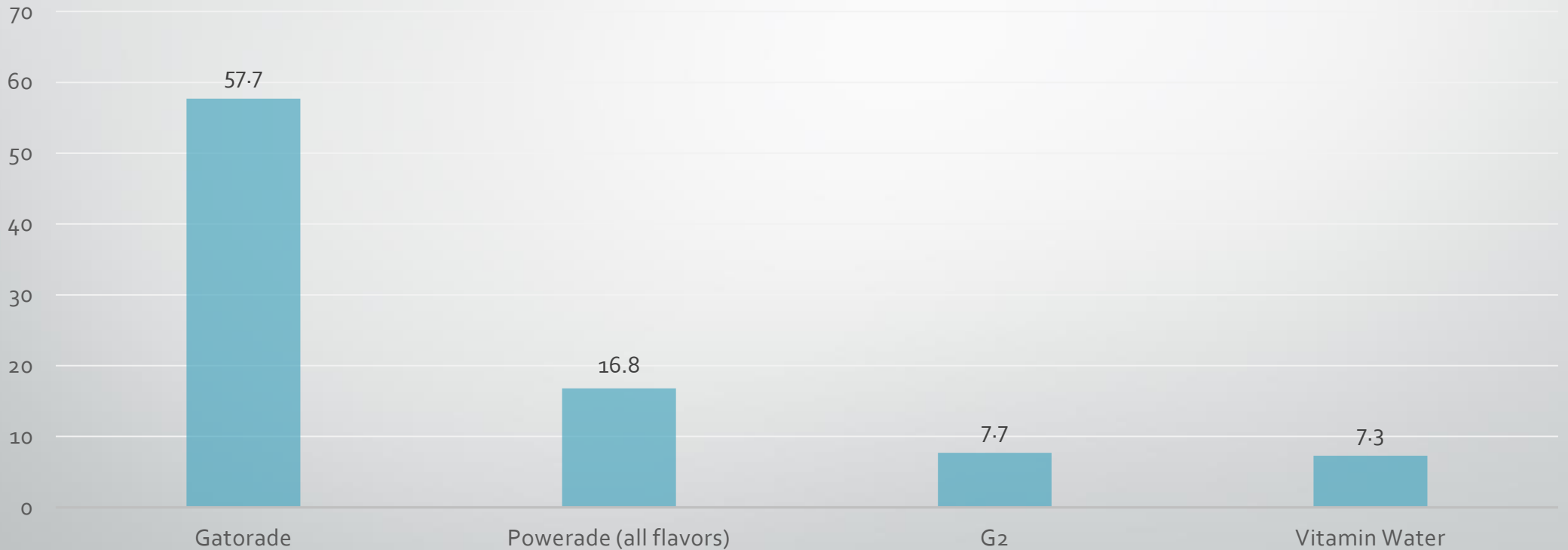
Leading Brands: Soft Drinks

(% of Golf fans in 2015 drinking brand most often)



Leading Brands: Sports Drinks

(% of Golf fans in 2015 drinking brand most often)



Leading Brands: Tablet Computer (% of Golf fans in 2015 using brand most often)

