International Golf Travel Market 2011

International®
Golf Travel Market
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Belek, Antalya, Turkey

UK Golf Industry Trends

1911–2011 GOLF MONTHLY
100 YEARS AT THE HEART OF THE GAME

SPORTS MARKETING SURVEYS INC.

Organised by:

Reed Travel Exhibitions®

INTERNATIONAL GOLF TRAVEL MARKET 2011
UK GOLF INDUSTRY TRENDS

Executive Summary:

Commissioned by Reed Travel Exhibitions, organisers of International Golf Travel Market, this report looks at the golf tourism market from the point of view of the UK golfer, Europe's largest golf market – analysing their golf tourism behaviour and evaluating issues such as where they are going, what is influencing their decision on where they go, and how their behaviour is changing.

A sample of more than 2,400 golfers – all readers of *Golf Monthly*, the UK's highest read golf magazine – were surveyed for the report, compiled by SPORTS MARKETING SURVEYS INC.

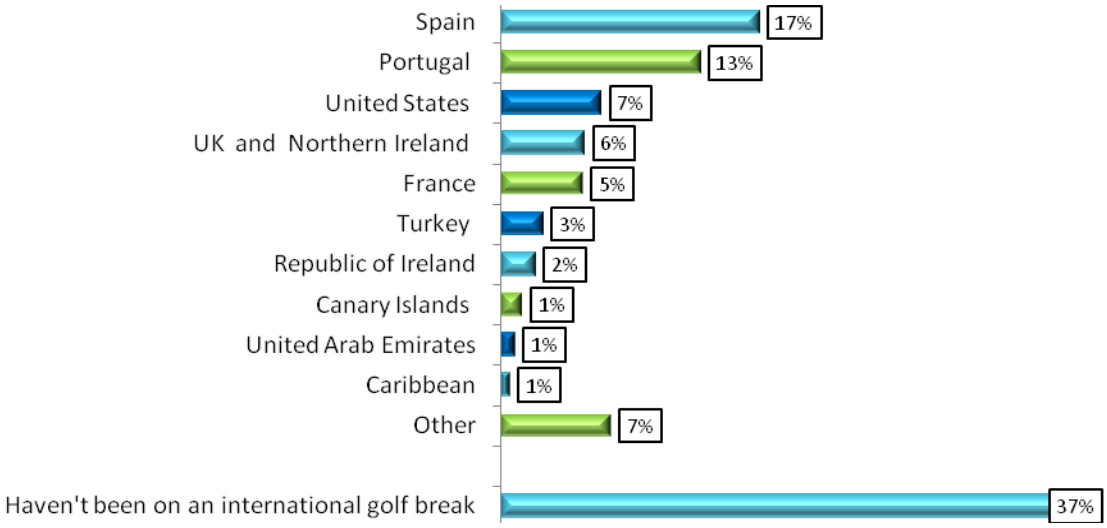
At a time of economic uncertainty, with multiple channels and sources of relevant information and where destination choices or alternative leisure time options are abundant, then understanding your target market has never been so important. Identifying the factors influencing golf travel and those having the most impact on the individual golfer's decision is vital.

Highlighting the importance of ensuring all guests receive the best in customer experience, this survey reveals that "word of mouth" recommendation is the primary research tool that UK golfers utilise when considering which venues and destinations to visit. 70% of the golfers surveyed stated that their friend's recommendation was either "important" or "very important". Also significant in influencing the destination is the role of the golf professional with 46% of respondents also valuing what their golf professional has to say. With online blogs / reviews being ranked the fourth most important avenue to research golfing destinations and 36% of golfers stating that they used social media when researching their last break, the channels through which recommendations and/or condemnations can be made are growing. The online and mobile community is vital to be a "net recommender" and "positive influencer", so venues need to ensure all guests leave as ambassadors and not critics.

Financial constraint is also a key element which this survey has identified as impacting the UK golfer's decision to travel. Over 80% of the golfers surveyed stated that airline costs for transporting golf clubs is having an impact on their decision to take international golf breaks, with a further 74% citing increasing airport costs as having an effect. With the highest percentage of the sample having stayed most recently in self-catering accommodation and 65% stating price as an important factor in their decision on venue/destination, it is clear that UK golfers are weighing up all cost implications before they commit to boarding the plane.

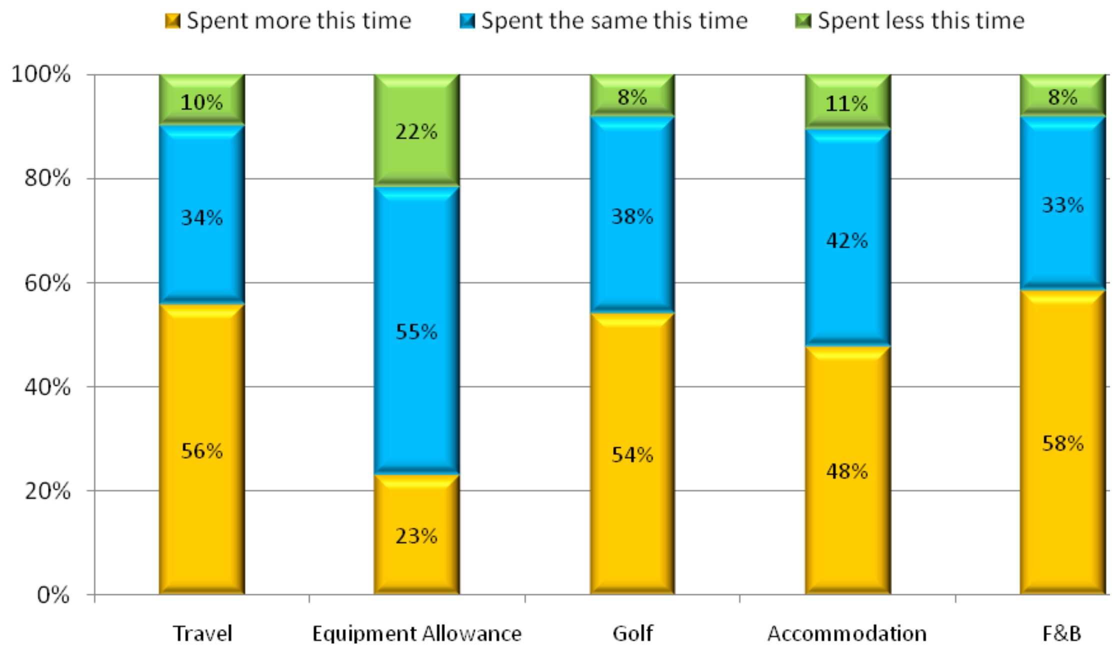
Recent International Break:

- Almost two thirds of UK golfers surveyed had previously taken an international golf break.
- Of those who had the top 10 destinations are as follows:



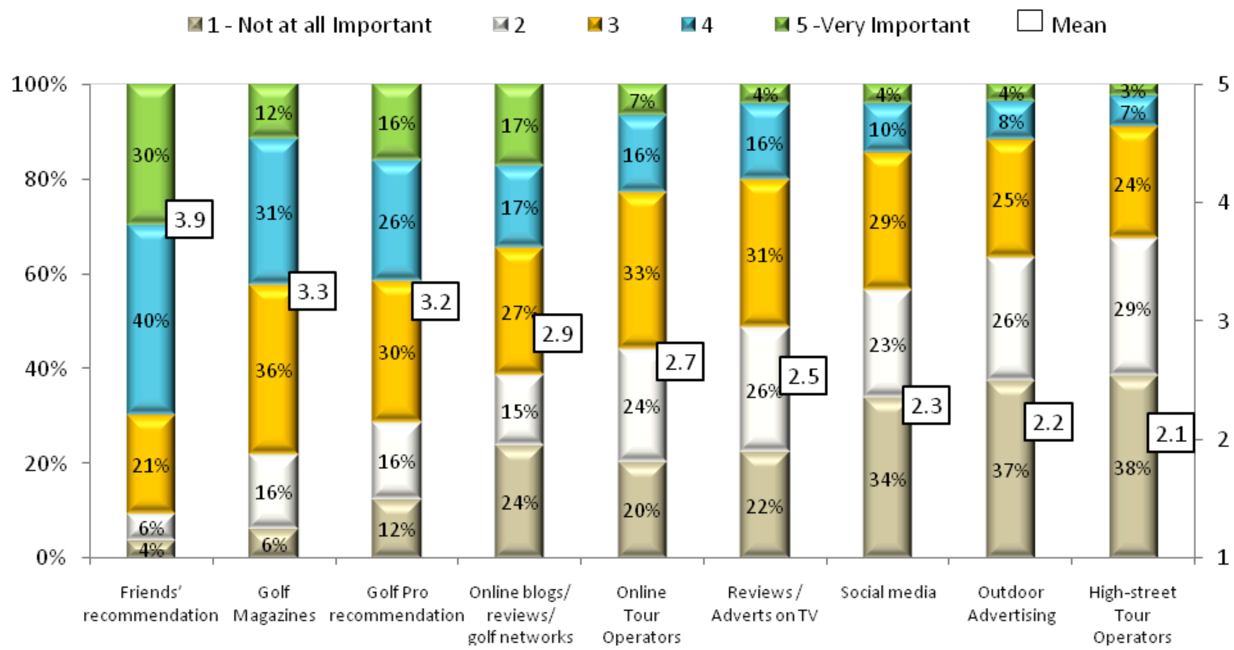
- Choice of destination varied little by age or gender although males and those under 30 were the most likely to state UK and Northern Ireland (presumably they considered going across borders as "international").
- This survey does not cover the "domestic" golf breaks – which are still the main type of golf holiday taken in the UK particularly the 3-4 day long-weekend. The results for UK & Northern Ireland would overall be much higher than the "international" figure detailed.
- Category 1 golfers (handicap 5 and below) were the most likely to travel to long haul destinations especially the US and UAE.
- The higher the handicap of golfer the less likely they are to have been on an international golf break.
- Almost a third of the golfers (32%) who have been on an international golf break stayed most recently in Self-Catered accommodation – making it the number one accommodation type – B&B (26%); Half Board (21%); All Inclusive (16%); Room Only (6%)
- Younger golfers (those under the age of 30) were the most likely to stay in either Self Catering or All Inclusive accommodation.
- All inclusive accommodation was more popular for golfers travelling long haul, accounting for 22% of golf breaks taken.
- On average the golfers surveyed played 3.1 courses and 4.7 rounds on their last international golf break. Travellers to long haul destinations played on average 1.5 rounds more than those taking a short haul golf break.
- Younger golfers played the least amount of courses but those aged 30 to 50 played the least number of rounds – whether through choice or because of other time or family pressures on the holiday.
- The better the standard of golfer the more courses and rounds they were likely to play – Category 1 played on average 3.3 courses and 5.4 rounds; Category 2 - 3.2 courses, 4.8 rounds; Category 3 – 3.0 courses, 4.6 rounds; Category 4 – 2.6 courses, 4.6 rounds.
- 2011 IGTM hosts, Turkey feature as sixth in terms of most recent international break (fifth if you exclude the UK & N. Ireland).
- At 3% this is a considerable increase on 2005 where 0.8% of UK golfers said their most recent golf break was Turkey (source: SPORTS MARKETING SURVEYS INC. golf tourism report).
- The increase in popularity is most evident amongst better golfers – Category 1 (4.9%) and Category 2 (3.5%).

Expenditure Compared to 5 years ago:



- The over 50 age group were the most likely to have spent "more this time" on all aspects of the holiday than both the younger golfer age groups – this will be influenced by their lifestage and perhaps other financial commitments on their families etc.
- Aside from the spending on equipment allowance when travelling, it is interesting that accommodation is the category that golfers are more cautious with their spending, suggesting that where they sleep is less important to them than the golf they get to play and the food and beverage they want to consume.

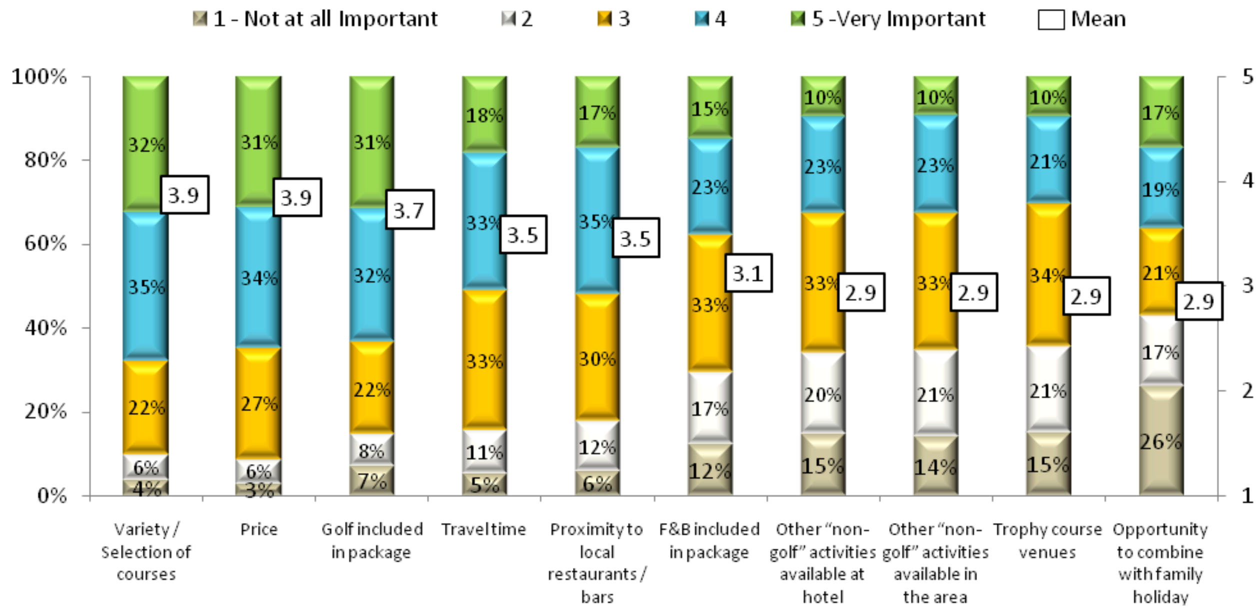
Important factors – Researching holidays:



- The importance of word-of-mouth, primarily from friends but also the golf pro is a key resource for golfers when researching where to take a golf break. This highlights the importance of venues providing a quality service to guests when they take a golf break as they will often be the most influential ambassadors for a venue, whether recommending or condemning a destination.

- Amongst the Golf Monthly readers surveyed, Golf Magazines are considered the second most important source for researching golf breaks.
- The influence of online blogs/reviews/golf networks is a further extension of this peer recommendation as it is clear that golfers are more trusting of what fellow golfers have to say about a location than what tour operators or advertising have to say – this is especially the case for younger golfers who rate online blogs as important as golf magazines.

<u>Important factors – Venue/Destination Choice:</u>



- When choosing an international destination to take a golf break it is clear that UK golfers want to go somewhere that they can play a "variety/selection of courses". This is important for single golf course operators to realise as in order to attract to the travelling UK golf market there is a need for them to form partnerships/clusters in order to appeal to the 68% who believe a variety is either "important" or "very important" in their decision.
    - This is especially the case for younger and better golfers.
- Golf is still very much seen as a stand-alone holiday, separate from one taken with the family. This applies to all respondents regardless of age, gender or handicap.

<u>Social Media:</u>

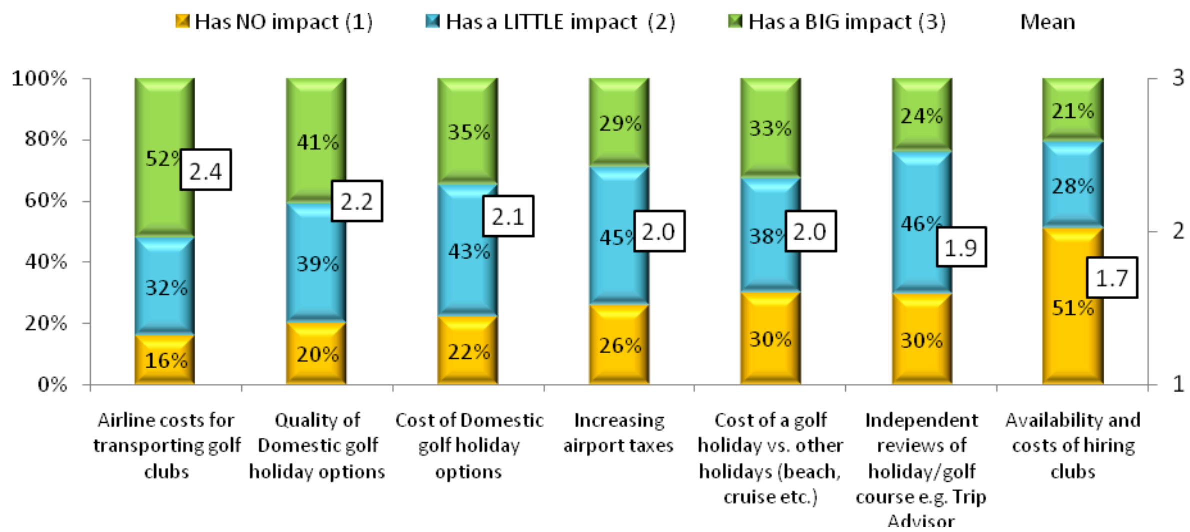
- Just over a third of UK golfers (36.1%) used a social media site when researching their last international golf holiday.
    - Almost half of under 30's used at least one social media site, highlighting the importance of this in attracting the younger/emerging travel market.
- Of the social sites listed Tripadvisor was by far the most referenced source with over a quarter of the sample (26.3%) having used this website to research their break.
    - Over a third of Category 1 golfers used Tripadvisor to research their most recent international golf break.
- Of the generic social media sites, 6.7% of the sample referred to Facebook for research and a further 4% looked at Twitter.
    - Of under 30's – 13% looked at Facebook and 11% referred to Twitter.
- Amongst those who did use a social media platform to research their holiday, only a third changed their decision based on the information sought.

- Few of the respondents changed their plans completely, but a quarter did change their hotel based on these reviews.
- This highlights the importance for hotels to ensure they monitor their ratings/image on social media websites as a proportion of travelling golfers, especially younger golfers, will use social sites and alter their decisions based on the information they find.

Booking Times:

- Over half of the golfers (51.5%) surveyed book their international golf break between 6 months to a year in advance of their departure date. A further 11% do so more than a year in advance and a further 26.8% do so between 3 to 6 months in advance.
  - Perhaps as a result of increased family commitments, it is golfers aged between 30 and 50 that are the most likely to book their holiday furthest in advance – 66.5% do so at least 6 months before their travel date.
- Booking times for domestic breaks is considerably less than for international breaks – 50.1% book 3 months or less before they travel.
- Over 70% of golfers stated that the length of time prior to booking their holiday had not changed over the last 5 years. Of the remaining golfers there was a similar percentage stating that they had booked their holiday earlier (14.7%) as the percentage stating they booked later (14.0%).

International Golf Break – impacting factors:



- The impact of raising airline costs for transporting golf clubs is having the biggest impact on a golfer's decision to take an international golf break with over 80% stating it having at least a little impact (52% stating it has a BIG impact).
- The availability of good quality venues and cost savings of domestic holiday options is also playing a significant role, having an impact for over three quarters of UK golfers.
- Interestingly, the factors of greatest impact remain consistent amongst all golfers regardless of gender, age and handicap.

About IGTM
IGTM is owned by the world's leading events organiser Reed Exhibitions (RE), which organises a portfolio of other travel industry events including World Travel Market, Arabian Travel Market and International Luxury Travel Market.

In 2010, RE held more than 460 events in 36 countries bringing together more than seven million people from around the world generating billions of dollars in business.

About Reed Travel Exhibitions
Reed Travel Exhibitions (RTE), a business unit of RE, is the world's leading provider of exhibitions in the travel and tourism industry. Its wide-ranging portfolio of events around the globe covers leisure travel, luxury travel and the meetings and incentives industry.

The 12 events are: International Golf Travel Market (IGTM), World Travel Market (WTM), Arabian Travel Market (ATM), International French Travel Market (IFTM), La Cumbre, International Luxury Travel Market (ILTM), International Luxury Travel Market Asia (ILTMA), Asia Pacific Incentives & Meetings Expo (AIME) (owned by Melbourne Convention Visitors Bureau), Exhibition for the Incentive Business Travel Market (EIBTM), Gulf Incentive Business Travel Market (GIBTM), Americas Incentive Business Travel Market (AIBTM) and China Incentive Business Travel Market (CIBTM).

Reed Exhibitions is owned by Reed Elsevier, the world's leading provider of professional information and online workflow solutions.

About Golf Monthly
Established in 1911 by double Open Champion, Harold Hilton, Golf Monthly is the world's oldest monthly golf magazine.

Written by golfers, for golfers, each issue comes packed with expert instruction advice from Golf Monthly's top 25 Coaches and some of the biggest names on Tour, equipment reviews and advice on where to play and stay, plus star player interviews and coverage of issues affecting every level of the game. Quite simply it is the preferred choice of those who are serious about their golf.

About SPORTS MARKETING SURVEYS INC.
SPORTS MARKETING SURVEYS INC. is an experienced and focused sports research business servicing the sports facility, equipment & sports' goods industry. The company is the Official Equipment Census supplier for the European Tour, operates Visit Wales Golf Tourism Monitor, and undertakes international sports & lifestyle analysis on the golf market.

SPORTS MARKETING SURVEYS INC. delivers a full research service primarily for sports equipment manufacturers, for federations, retailers and sports venue operators where the general public or members play their sport. Service, solutions and insights will be provided to all those interested in participation rates, equipment and facility usage, sports brand images, retailer & end-consumer satisfaction, operating costs and associated areas. For more information visit www.sportsmarketingsurveysinc.com.