



**International
Golf Travel
Market®**

15-18 October 2018
Slovenia

SPORTS MARKETING SURVEYS INC.

INTERNATIONAL GOLF TRAVEL MARKET 2018

EUROPEAN GOLF TOURISM TRENDS &
SPOTLIGHT ON SLOVENIA

ORGANISED BY REED TRAVEL EXHIBITIONS





IGTM 2018 EUROPEAN GOLFER SURVEY

Background:

With the partnership between Reed Exhibitions and SPORTS MARKETING SURVEYS INC. now in its sixth year, the 2018 research looks to build upon the general tourism findings reported in 2014 and 2017 to identify emerging trends and developments that have occurred.

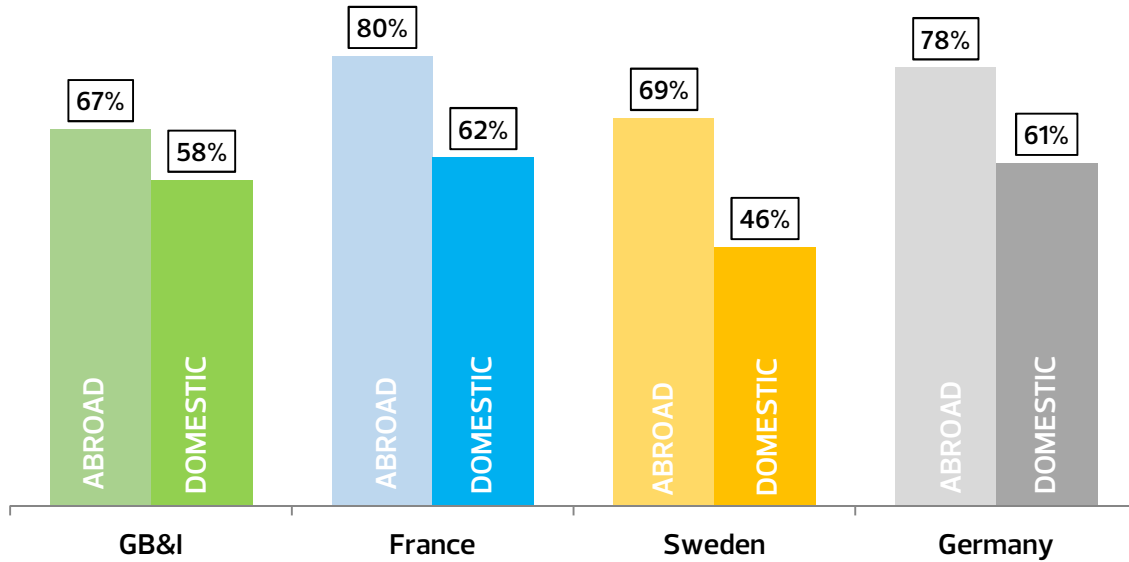
This report looks at the golf tourism market from the point of view of the regular golfer from Europe's four largest golfing markets; Great Britain & Ireland, France, Germany and Sweden. Topics included analysing where they are going, how long they stay, what influences their decision on holiday location, and how their behaviour on choosing a golf break and how they organise their golf break is changing.

The 2018 report also focusses on IGTM host destination, Slovenia, revealing how the country is viewed by European golfers as a potential golf break destination, likelihood of visiting Slovenia for a golf break in the coming years and what is required to enhance interest.

Around 8,000 regular golfers (those who play at least 10 times a year) were surveyed for the report, sourced through SPORTS MARKETING SURVEYS INC.'s partnerships with leading golf organisations and federations in each market.

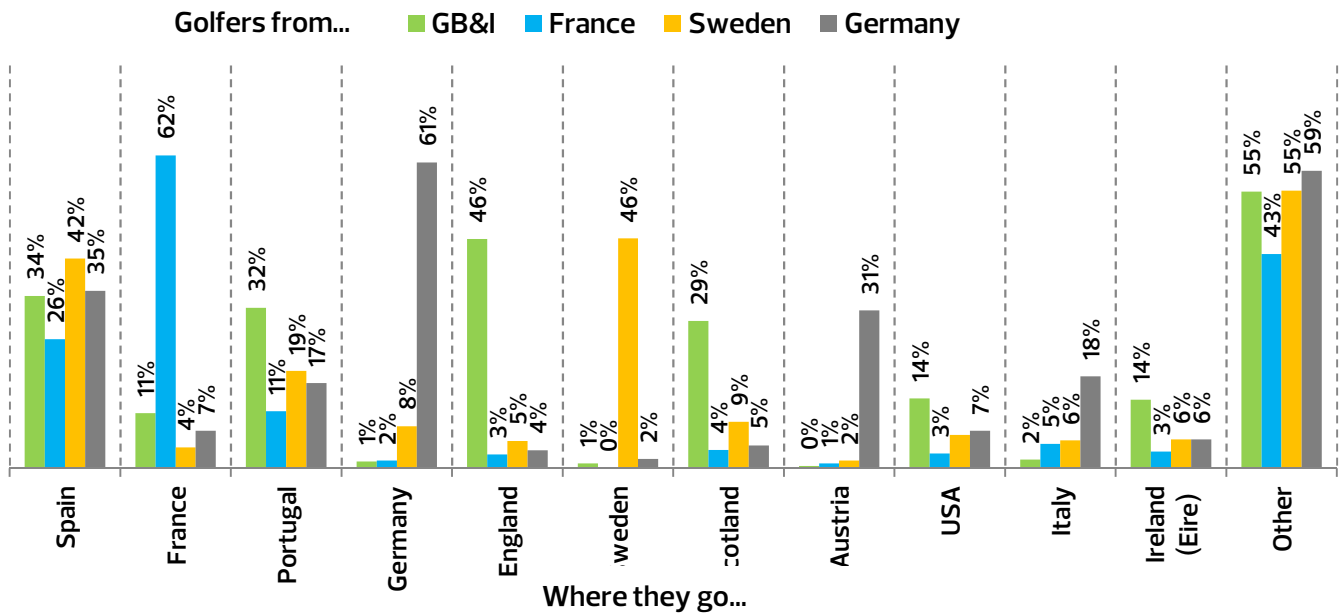


Golf Holidays in the last 12 months



- European golfers are more likely to take a golf trip abroad rather than stay in their own country.
- French golfers are most likely to have taken a golf trip in the last year, whether abroad or in France

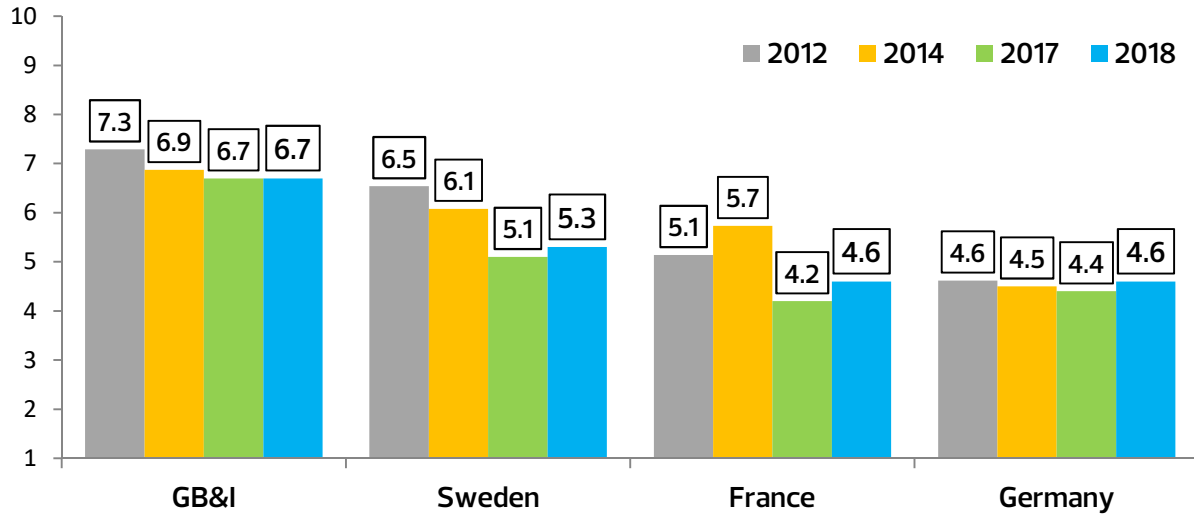
Non Domestic Holidays in the last 12 months



Across all 4 markets, more than 1 in 4 international golf holidays were taken in Spain, with this rising to over 42% from Sweden.



Size of Travel Group



All group sizes have increased since last year, with Brits travelling in the largest groups, followed by Swedish golfers.



Just 7% of European golfers travel alone



58% of all respondents across all markets stated they travelled in a group of between 2 and 4 people





GB&I golfers prefer to travel with golfing friends and are considerably less likely to travel with non-golfing members in their group, with just 1 in 4 stating that they did so on their last non-domestic golf break.

Golfers from France, Sweden and Germany were much more likely to combine their golf break with a family holiday (around 40-45%), whereas British golfers are more likely to travel with friends in a larger group.







Average Length of the “non-domestic” Golf Holiday

The length of golf trips that European golfers have taken seems to be decreasing of late, however German and Swedish golfers tend to take the longest tips at 6.8 days – they

				
2014	8.4	7.8	7.2	8.2
2017	7.0	6.6	5.8	5.7
2018	6.8	6.8	5.6	5.7

Rounds Vs Courses Played

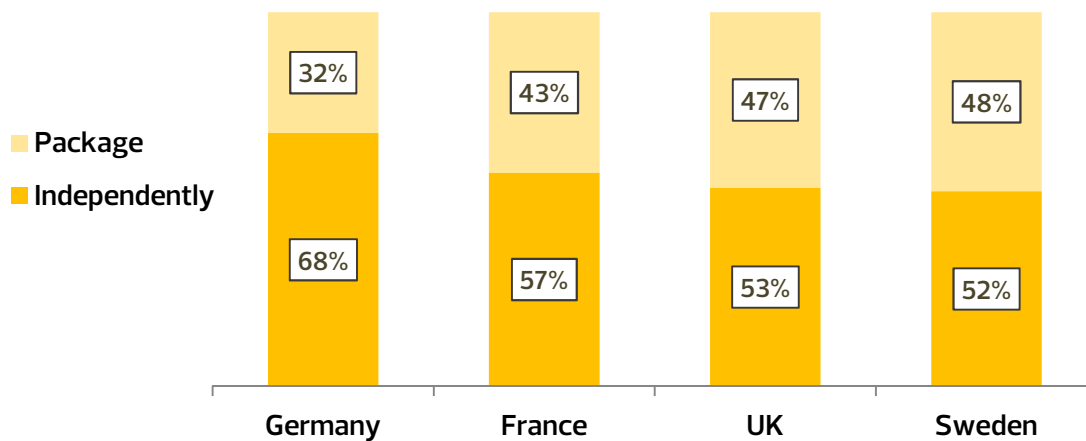
Despite taking the longest golf breaks, German golfers do not play as many rounds of golf as Swedish golfers when they go on holiday. French golfers take the shortest breaks and play the fewest rounds of golf.

				
Rounds	5.6	5.0	4.0	4.0
Courses	3.2	3.4	3.3	2.9



Researching/Booking

Golfers were asked whether they prefer to book golf holidays independently or book a package holiday:



The decision to book package golf holidays or book independently is relatively unchanged compared to 5 years ago. In 2012, just over half of golfers chose to book their golf holidays independently and in 2017 this stood at 57% of British golfers, 56% of French golfers, 53% of Swedish golfers and a generous 70% of German golfers – this year it remains relatively unchanged.



Age and gender do not tend to influence whether golfers are more or less likely to book independently or through a package



Older golfers more likely to use a travel agent to book their golf holiday, while younger golfers are more likely to use golf specific holiday websites



What's important in booking a golf break?

The golfers were asked what is the most important factors or requirements that they look for in selecting and booking a golf break, and respondents answered on a scale of 1 "Not at all important" to 5 "Very important".





Attitudes to Slovenia as a Golf Destination

Although not many people we have surveyed had visited Slovenia for golf, there are some very positive outtakes from the research. The country is seen as somewhere undiscovered for golf, but beautiful, good value and good weather for golf. Golfers from across Europe are interested in visiting Slovenia for golf but perhaps need educating on all that it has to offer.

Who sees Slovenia is a new and emerging golfing destination?



10%



10%



2%



2%

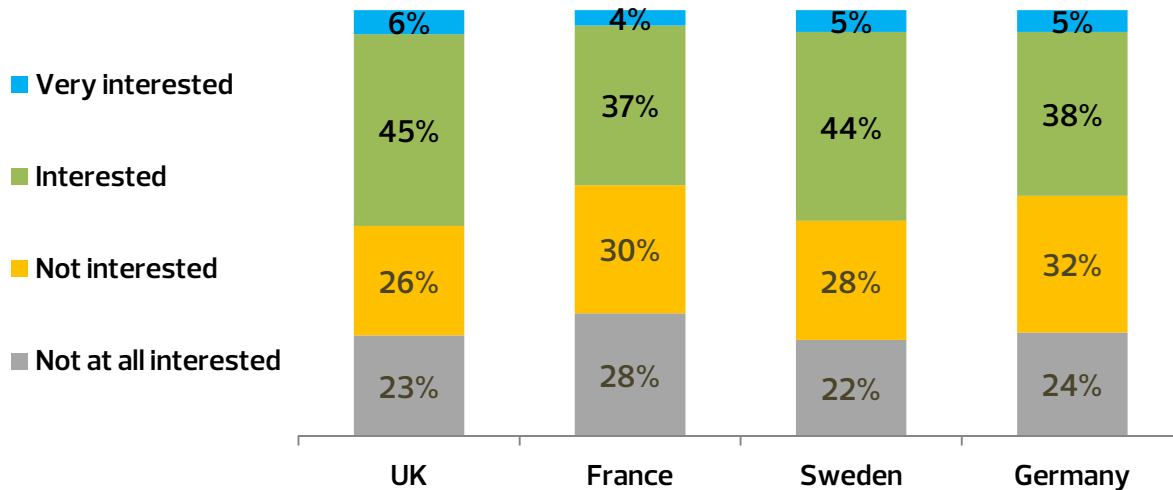
Turkey, Portugal, the UAE and South Africa are most likely to be seen as new and emerging golfing destinations by European golfers.

These are the words and phrases that golfers most associate with Slovenia as a golfing destination:





How interested would you be in taking a golf break to Slovenia in the next 3 years?



At least 40% of golfers from each of the surveyed country said that they are interested in visiting Slovenia for a golf trip in the next 3 years which is incredibly encouraging for the future of golf tourism in Slovenia

These are the main reasons that people either would or wouldn't be interested in taking a golf trip to Slovenia in the next 3 years:

<u>Top 5 reasons for interest</u>	
Good value for golf	53%
To try a new golf destination	46%
Visiting a new country	40%
Climate	33%
Good value off the course	21%

<u>Top 5 reasons for disinterest</u>	
Visiting a new country	41%
Climate	26%
Unsafe place	22%
Poor non-golf / tourist attractions	10%
Food and drink	10%



Acknowledgements and Thanks

SPORTS MARKETING SURVEYS INC. would like to thank all of our partners with whom we have been able to access regular golfers to research for this report:

HowDidiDo

French Golf Federation (FFG)

Golf.de

Swedish Golf Federation (SGF)

Your Golf Travel

Country Specific Reports

SPORTS MARKETING SURVEYS INC. has produced in-depth market reports looking at each of the four markets mentioned in this report.

These reports go deeper than the overall market trends and look at specific sub-groups within each market to create a complete picture of the golf tourism landscape.

Looking at how different genders, age groups and golfing abilities view, research and book golf breaks will enable subscribers to the reports to ensure that no stone is left uncovered and provide the insight necessary to gain competitive advantage over others in the industry.

For more information on these reports please contact Richard Payne (richard.payne@sportsmarketingsurveysinc.com) and +44 (0) 1932 345 539.



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Reed Exhibitions

Reed Exhibitions is the world's leading events business, enhancing the power of face to face through data and digital tools at over 500 events a year, in more than 30 countries, attracting more than 7m participants.

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.



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