SPORTS MARKETING SURVEYS INC.

INTERNATIONAL GOLF TRAVEL MARKET 2017

EUROPEAN GOLF TOURISM TRENDS & SPOTLIGHT ON FRANCE

ORGANISED BY REED TRAVEL EXHIBITIONS

IGTM 2017 EUROPEAN GOLFER SURVEY

Background:

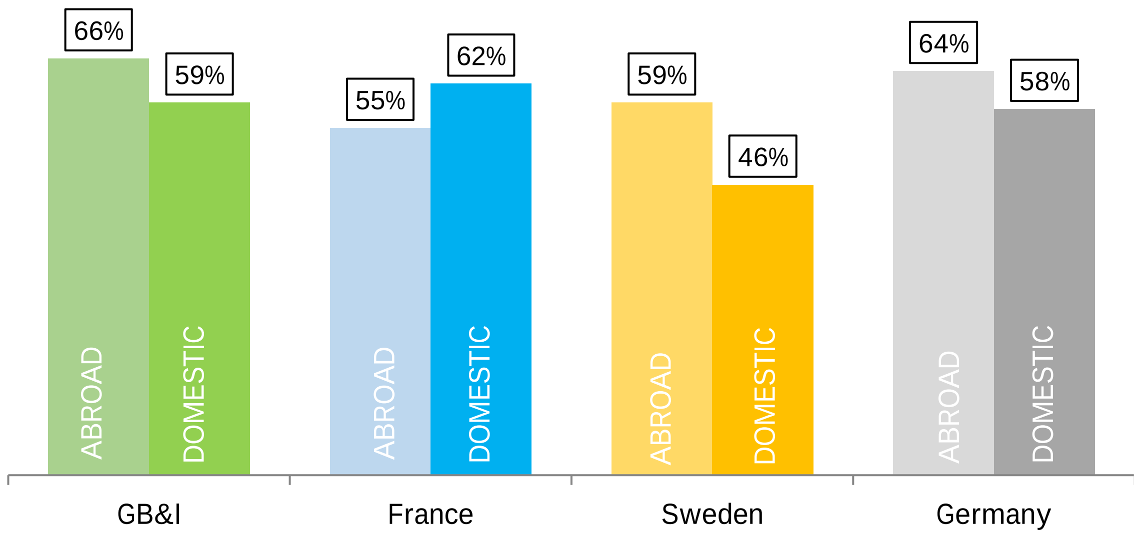
With the partnership between Reed Exhibitions and SPORTS MARKETING SURVEYS INC. now in its fifth year, the 2017 research looks to build upon the general tourism findings reported in 2014 and identify emerging trends and developments that have occurred.

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 2017 report also focusses on IGTM host destination, France, revealing how the country is viewed by European golfers as a potential golf break destination, likelihood of visiting France for a golf break in the coming years and what is required to enhance interest.

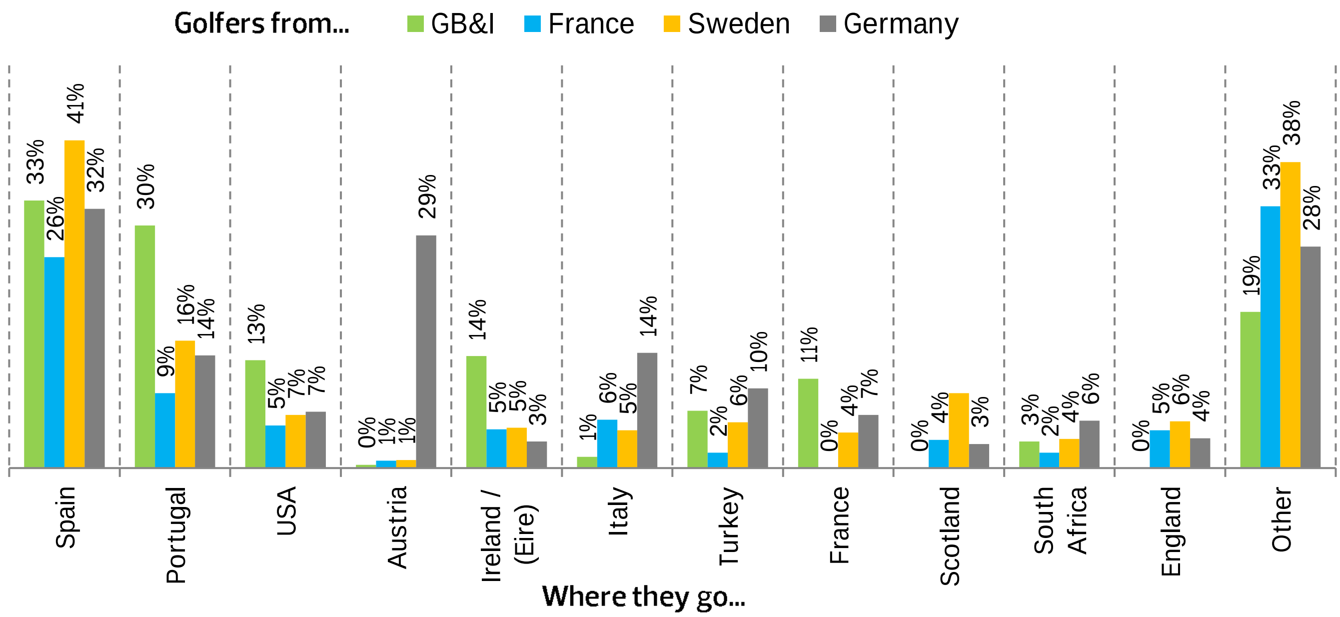
Over 10,000 regular golfers (those who play at least 10 times a year) were surveyed for the report, sourced through SPORTS MARKETING SURVEYS INC.'s partnerships with leading golf organisations and federations in each market.

Golf Holidays in the last 12 months



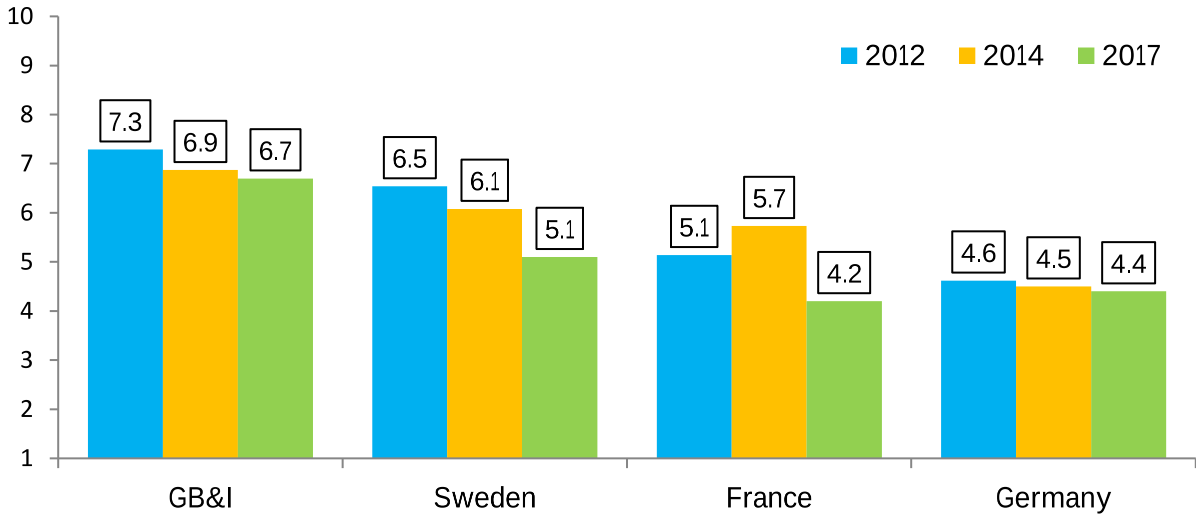
- British, Swedish and German golfers are more likely to have travelled abroad for a golf trip in the last 12 months rather than stay in their own country, however French golfers are more likely to have taken a golfing trip in France than travel abroad

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 41% from Sweden.

Size of Travel Group



GB&I & Swedish golfers travelled, on average, in the largest groups although this number has decreased a little over the last couple of years. The average size of a French group has decreased by over 1 person and now sits at just over 4 people.

Just 5% of European golfers travel alone

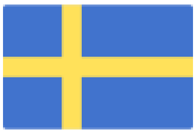
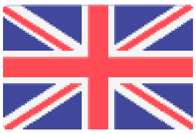
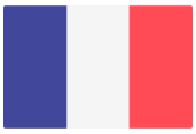
Almost three quarters of all respondents across all markets stated they travelled in a group of between 2 and 8 people

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 5 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%), French golfers are the most likely to travel with children.

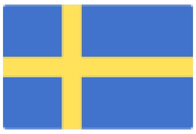
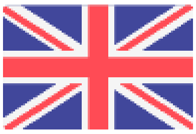
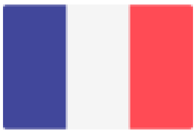
Average Length of the "non-domestic" Golf Holiday

German golfers continue to be the nationality that stay, on average, the longest for their "non-domestic" golf break - (7.0 days compared to 6.6 days for Swedish golfers; 5.8 amongst golfers from GB&I and 5.7 for French golfers).

				
2014	8.4	7.8	7.2	8.2
2017	7.0	6.6	5.8	5.7

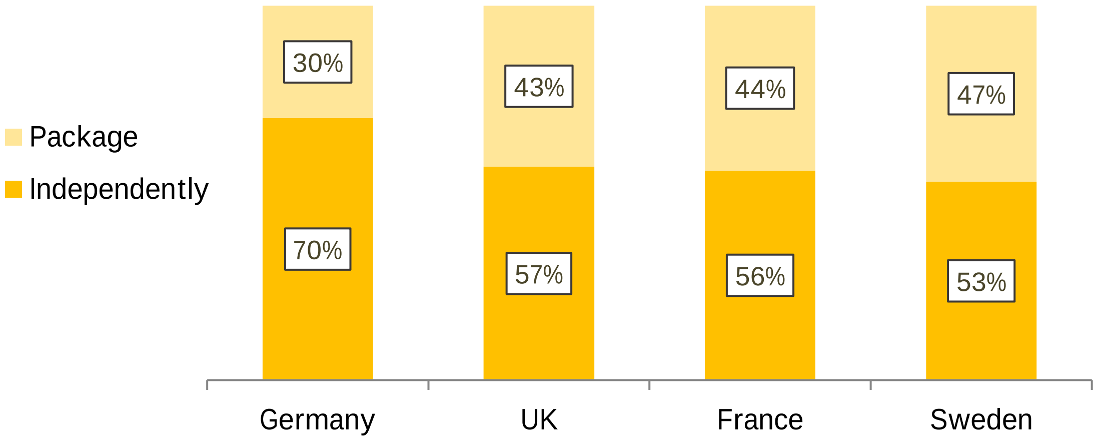
Rounds Vs Courses Played

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	4.1	4.0
Courses	3.3	3.3	3.3	3.0

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 stands at 57% of British golfers, 56% of French golfers, 53% of Swedish golfers and a generous 70% of German golfers.

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?

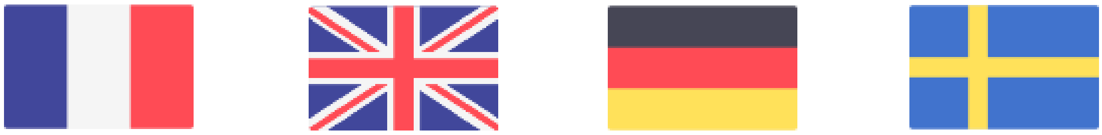
The golfers were asked what is the most important factors or requirements that they look for in selecting and booking a golf break, and respondents answered on a scale of 1 "Not at all important" to 5 "Very important".

4.1	Tee time availability
4.0	Variety / selection of courses to play
4.0	Quality of overnight accommodation
3.7	Quality of the eating and drinking facilities before and after the golf
3.6	Golf included in the package
3.6	Travel time
3.6	Proximity to local restaurants / bars
3.5	Quality of service from operator / agent
2.9	Food & beverage included in package
2.9	Hotel facilities – swimming pool

Attitudes to France as a Golf Destination

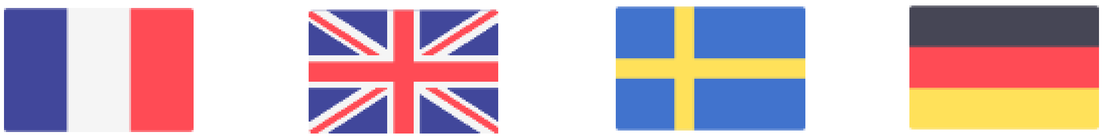
September marked the start of Ryder Cup qualification for team Europe, and with that, eyes have begun to shift to Paris, and Le Golf National. France is an established golf tourism destination but with the Ryder Cup taking place in 2018, and an Olympic Golf Tournament to host in Paris in 2024, the country has a chance to cement itself as a bucket list destination for golf tourists.

Who has taken a golf trip in France in the last 12 months?



64% 11% 7% 4%

Who considers France a "top golfing destination"?



24% 7% 3% 2%

Whilst the domestic golf tourism market is strong, a fact proven by the fact that French golfers rank France as the best golf holiday destination, above Spain, France has a chance to enhance its appeal worldwide. Currently France ranks as the 10th best golf destination for UK golfers, and the 14th best destination among Swedish golfers.

Just as Celtic Manor provided a boost to Welsh golf tourism, a year of hype and week of stellar golf has the chance to put Le Golf National and golf in France in general at the forefront of golfers' minds. France offers the chance to tie in a golf trip with either a city break or a sunny holiday in the south, with food, wine and cultural delights. Working out how to market these charms to different groups and nationalities of golfers is the key challenge for France, just as it is for every country offering a golf tourism proposition.

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)

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.

IGTM is owned by the world's leading provider of exhibitions in the travel and tourism industry, **Reed Travel Exhibitions (RTE)**. Reed Travel Exhibitions has a growing portfolio of more than 22 international travel and tourism trade events in Europe, the Americas, Asia, the Middle East and Africa. The events are market leaders in their sectors, whether it is global and regional leisure travel trade events, or specialist events for meetings, incentives, conference, events (MICE) industry, business travel, luxury travel, travel technology as well as golf and spa travel. RTE has over 35 years' experience in organising world-leading travel exhibitions.

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.

CONTACT DETAILS

SPORTS MARKETING SURVEYS INC.

The Courtyard, Wisley, Surrey GU23 6QL, UK
www.sportsmarketingsurveysinc.com
Tel: + 44 (0) 1932 345 539

INVESTIGATION

INSIGHT

ACTION

JOHN BUSHELL | MANAGING DIRECTOR
john.bushell@sportsmarketingsurveysinc.com

RICHARD PAYNE | DIRECTOR – SPORTS ACCOUNTS
richard.payne@sportsmarketingsurveysinc.com

SARAH CUSITION | SENIOR SPORTS RESEARCH EXECUTIVE
sarah.cusition@sportsmarketingsurveysinc.com

Icons created by Freepik from www.flaticon.com