

## GOLF VISITORS TO WALES MAIN TRENDS AND PROFILE OF VISITING GOLFERS

All information in this paper is taken from the Golf Tourism Monitor undertaken by Sports Marketing Surveys

### TRENDS

1. The total of Golf visitors to Wales has increased between 2004-2008 by 19% (to 165,900), and related expenditure has increased by 28% (to £29.4 million in 2008) during this five year period.

2. The volume of visiting golfers who stay overnight in Wales was 78,800 in 2008. The total has fluctuated between 2004 and 2008 but related expenditure has risen steadily year on year to £23.5 million in 2008.

3. The origin of staying visitors in 2008 was as follows:

UK (excluding Wales)	66.3% (52,200)
Wales	28.6% (22,500)
Europe	1.8% (1,400)
Ireland	2.3% (1,800)
USA	1.1% (700)

For comparison, in 2004 the origin of staying visitors was as follows:

UK (excluding Wales)	48.6% (37,100)
Wales	44.9% (34,300)
Europe	3.6% (2,700)
Ireland	1.8% (1,400)
USA	1.1% (800)

(Note: Visitor numbers are rounded to the nearest hundred)

4. The volume of Day Visit Golfers has increased by 38% from **63,000** in 2004 to **87,100** in 2008. Associated expenditure has increased by 64%, from £3.6 million, to £5.9 million.

In 2008:

- 68%** of day visitors came from Wales
- 32%** of day visitors came from elsewhere in the UK.

# PROFILE OF GOLF VISITORS

## Consumer Interviews – Profile of Golf Visitors

Demographics	2004	2005	2006	2007	2008	Wales	England	Scotland	Northern Ireland	Eire	USA	Europe
<b>Base:</b>	<b>819</b>	<b>769</b>	<b>900</b>	<b>830</b>	<b>949</b>	<b>389</b>	<b>473</b>	<b>26</b>	<b>5</b>	<b>12</b>	<b>11</b>	<b>6</b>
<b>Sex:</b>												
Male	92	87	89	91	87	78	95	85	60	75	100	100
Female	8	13	11	9	13	22	5	15	40	25	-	-
<b>Total %</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>
<b>Age :</b>												
<18yrs	1	2	3	2	0	1	-	-	-	-	-	-
18-29	6	6	5	6	9	10	8	-	-	-	-	-
30-39	16	17	14	12	25	19	30	23	40	58	27	67
40-49	23	29	24	27	31	30	32	35	-	42	18	33
50-59	27	29	28	25	22	20	22	35	60	-	27	-
60+	27	19	26	28	14	21	9	8	-	-	27	-
<b>Total %</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>
<b>Handicap:</b>												
0-9	19	14	12	14	12	11	9	23	60	25	9	33
10-18	52	51	49	52	58	49	65	69	40	58	73	50
19-36	29	35	37	33	29	34	26	4	-	17	18	17
No Handicap	1	0	2	1	2	5	-	4	-	-	-	-
<b>Total %</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>
<b>Playing Golf:</b>												
0-2 years	1	5	6	5	4	8	2	8	-	-	-	-
3-5 years	16	16	11	11	13	15	13	-	-	-	-	33
6-10 years	21	24	21	22	31	28	35	23	20	42	-	-
11-15 years	15	15	16	16	17	17	17	15	20	42	18	17
16-20 years	17	16	15	15	18	16	17	35	20	17	36	17
21-25 years	8	8	8	9	6	5	6	8	40	-	-	17
26 years +	22	17	23	22	12	12	11	12	-	-	46	17
<b>Total %</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

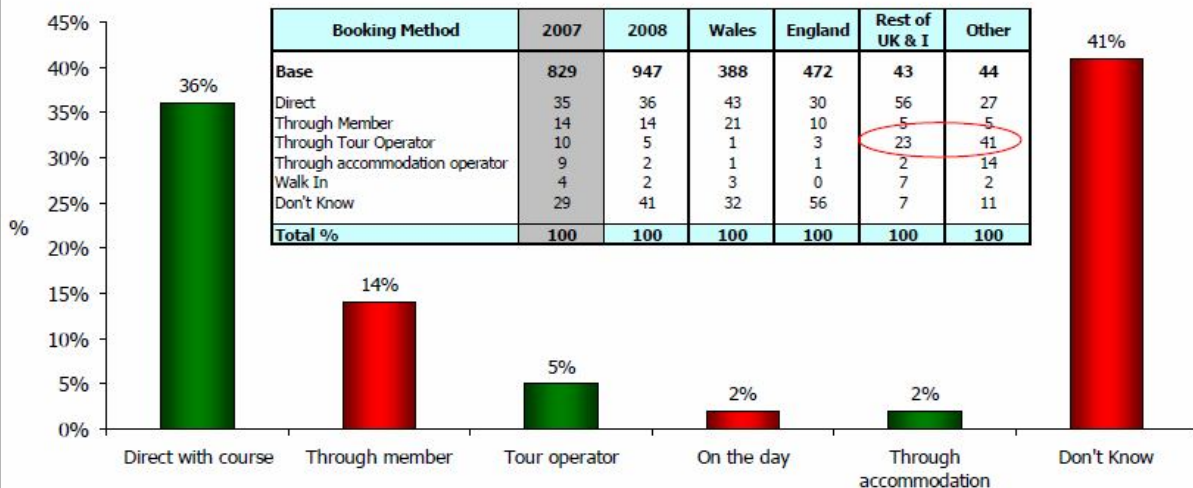
- » The average Wales visitor is an experienced male golfer with a mid to low handicap.
- » 2008 has seen the highest percentage of golfers under the age of 40.

## Consumer Interviews – Length of Visit (overnight visitors)

Duration	2004	2005	2006	2007	2008	Wales	England	Rest of UK & I	Other
<b>Base</b>	<b>440</b>	<b>419</b>	<b>427</b>	<b>391</b>	<b>404</b>	<b>82</b>	<b>237</b>	<b>42</b>	<b>43</b>
<b>Average</b>	<b>4.0</b>	<b>3.3</b>	<b>4.0</b>	<b>3.6</b>	<b>3.1</b>	<b>2.6</b>	<b>2.5</b>	<b>2.6</b>	<b>7.6</b>
2 days	21	32	15	23	62	63	72	57	5
3 days	29	43	48	36	21	28	19	33	0
4 days	19	11	16	20	3	2	4	2	0
5 days	12	5	7	9	2	2	0	5	9
6 days	7	-	3	2	0	0	1	0	0
1 week	8	8	9	8	6	4	3	2	33
1 - 2 weeks	3	1	1	1	0	0	0	0	2
2 weeks +	1	1	3	0	5	0	0	0	51
<b>Total %</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

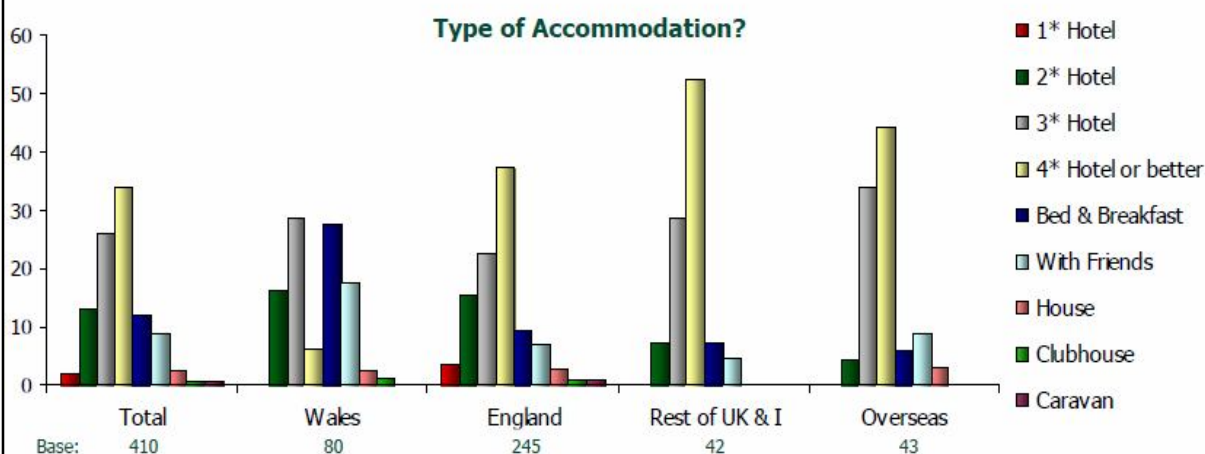
- » 43% of visitors were taking a golf break longer than 1 day in length.
- » Average length of golf break for these overnight visitors was 3.1 days.
- » The importance of weekend breaks is clear with over 80% of the overnight visitors staying for 2 to 3 days.

## Consumer Interviews – How golf round was booked?



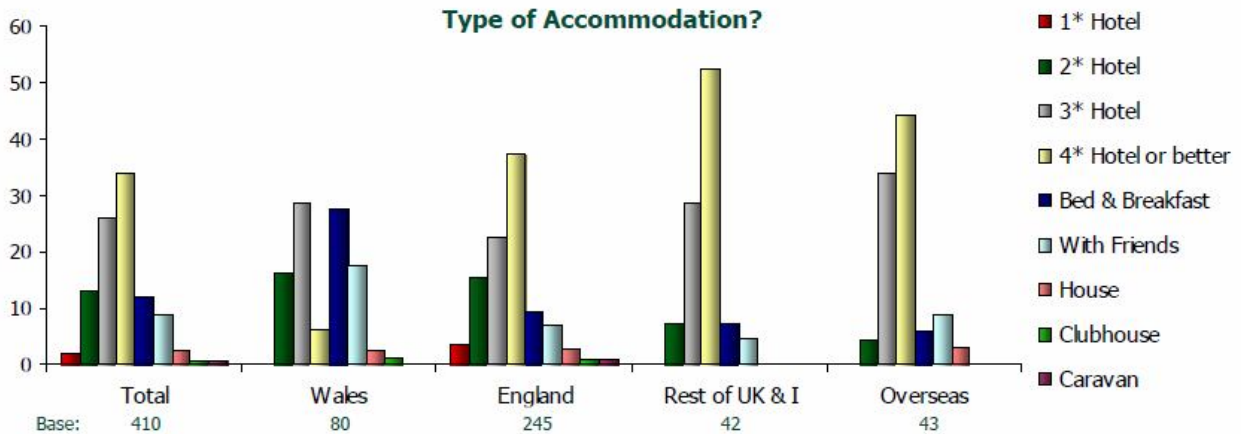
- » 36% of golfers book directly with the course at which they are playing.
  - » Of these, 71% used the telephone and 12% booked online (up from only 2% in 2007).
  - » The appeal of online booking has risen 50% since 2006.
- » 14% booked through a member at the golf course.
- » 41% booked didn't know how the booking was made – highlighting the high percentage of society and corporate golf breaks.

## Consumer Interviews – Accommodation



- » Similar to figures from 2006 and 2007 60% of visitors staying overnight in Wales stayed in 3\* or better accommodation.
  - » Excluding Welsh golfers this number rises to close to three quarters of the total visitors staying overnight on their golf break.
- » 87% of overnight visitors were staying in one place in Wales on their break – the lowest percentage since the research began.
- » Average rating of accommodation continues to be high at 4.2 (84% saying it was either Good or Excellent)

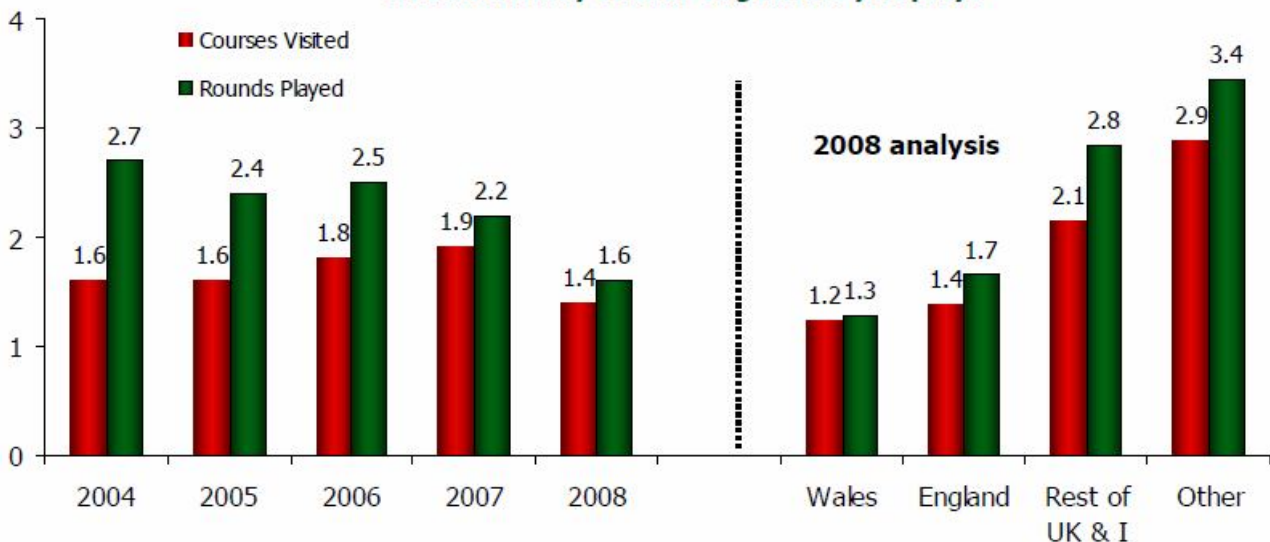
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## Consumer Interviews – Current Trip

**How many courses will you visit  
and how many rounds of golf will you play?**



- » This fall in 2008 is driven by the large increase in English day-trippers and fall in rounds/courses played by visitors from further afield than the British Isles.
  - » 74% of 'Other' visitors planned to visit a Heritage site or Arts Facility/Event in 2008 compared to only 38% in 2007 and 29% in 2006.



## Consumer Interviews – How does Wales rate?

Ratings	Overall	Welcome	Courses	Clubhouses	Pro Shops	Organisation
2008	4.4	4.7	4.5	4.3	4.2	4.5
2007	4.4	4.6	4.5	4.3	4.1	4.4
2006	4.2	4.5	4.4	4.2	3.9	4.3
2005	4.3	4.6	4.5	4.2	4.0	4.2
2004	4.6	4.7	4.7	4.5	4.3	4.5
Excellent	52	76	49	43	42	51
Good	40	21	47	47	39	44
Average	7	2	3	9	15	4
Poor	1	0	0	1	3	0
Very Poor	0	0	0	0	0	0
<b>Total %</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

- » Overall average ratings continue to be very positive in 2008 scoring 4.4 out of 5, with 92% of visiting golfers rating their visit as either Good (40%) or Excellent (52%).
- » The "Welcome" average rating has consistently been the highest result in each of the last five years.



## Consumer Interviews – Ryder Cup 2010 and VW Activities

2010 Ryder Cup in Wales knowledge	2004	2005	2006	2007	2008	Wales	England	Rest of UK & I	Other
Base	819	768	930	825	937	385	465	43	44
Yes	89	84	94	92	95	97	94	98	82
No	11	16	6	8	5	3	6	2	18
<b>Total %</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

- » 95% of visitors were aware that Wales was hosting the 2010 Ryder Cup – of them 98% were aware that Celtic Manor was the host venue.
- » Of the 322 visitors who had attended a tour event in the past 12 months, 44% had seen a Wales exhibition stand.
  - » Of these 44%, 84% said that it had had at least some influence on their decision to play golf in Wales (almost double the percentage in 2007 – 43%).