



SURVEY TO FOREIGN
GOLF PLAYERS

2019

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INTRODUCTION

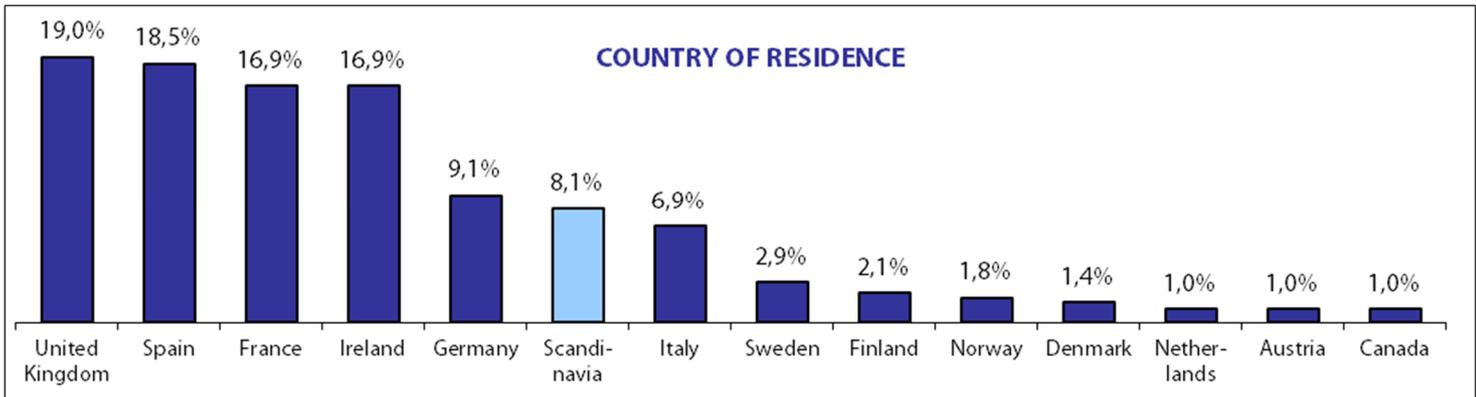
Taking into account the relevancy of golf in the tourism promotion strategy of destinations, namely in the Lisbon Region, in 2004 the Observatório of Turismo de Lisboa has initiated a study about foreign golf players in the Lisbon Region, in order to draw their profile and gathering a deeper knowledge of this segment.

Similarly to last years, the designed questionnaire was submitted by the company 2ii – Informática e Informação, all throughout 2019, to a total of 627 foreign golf players within a representative sample of golf courses in the Lisbon Region.

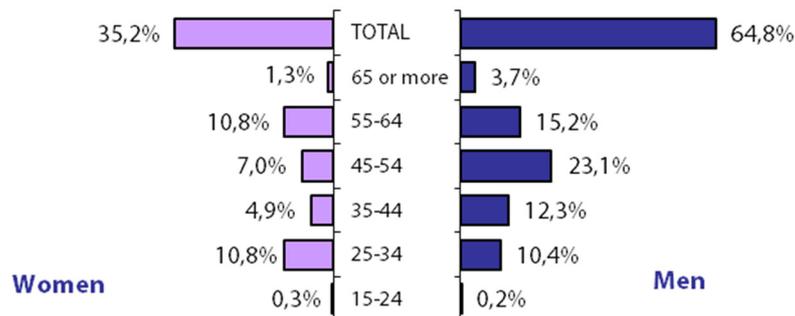
In this report we highlight the main conclusions drawn from the collected data.

MAIN RESULTS

PROFILE OF THE FOREIGN GOLF PLAYER IN LISBON REGION

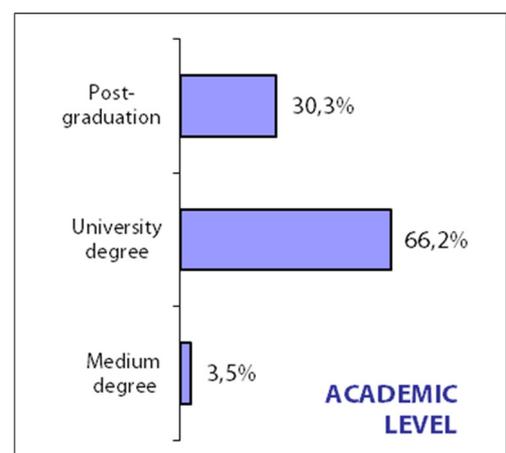


19,0% of the interviewed golf players reside in the United Kingdom (in second place in 2018 with 15,2%). Scandinavia, in first place in 2018 with 19,2%, comes this year in sixth place. The following positions are occupied by Spain, France and Ireland.

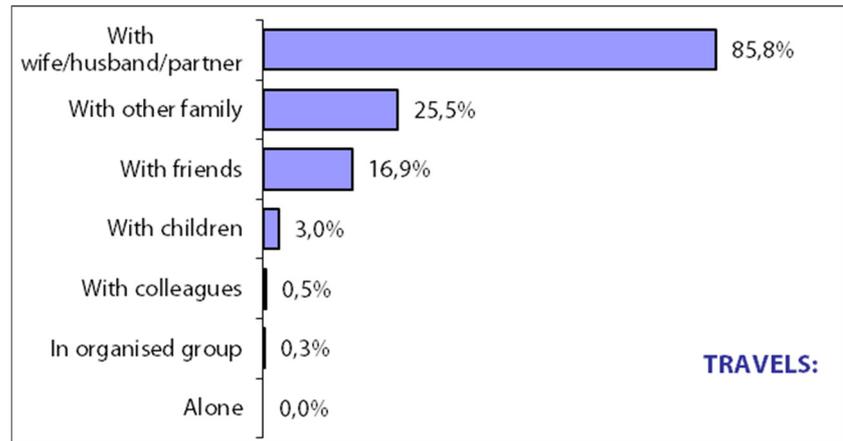


64,8% of the foreign golf players interviewed in the Lisbon Region were men (81,6% in 2018). Similarly to the previous years, the most relevant age group was between 45 and 54 years old.

In what concerns the academic level, 96,5% of the interviewed golf players holds at least a university degree (89,9% in 2018).



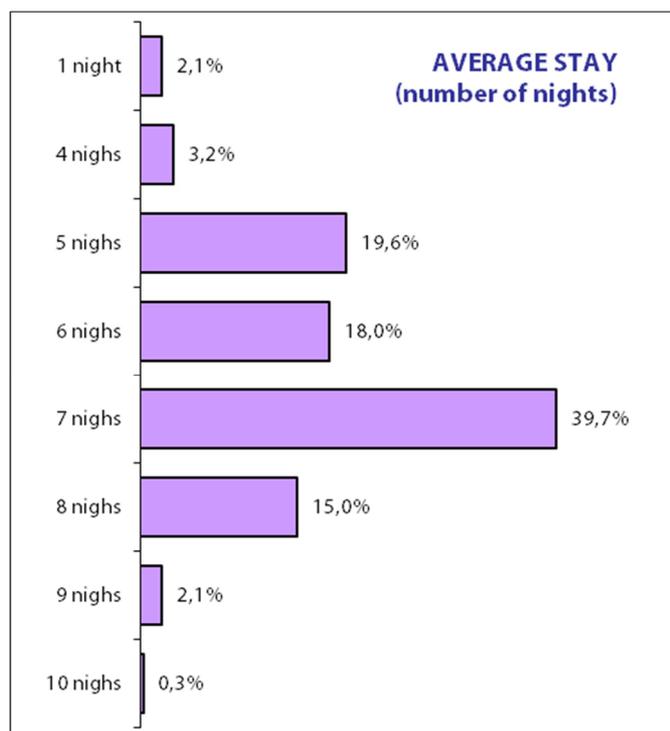
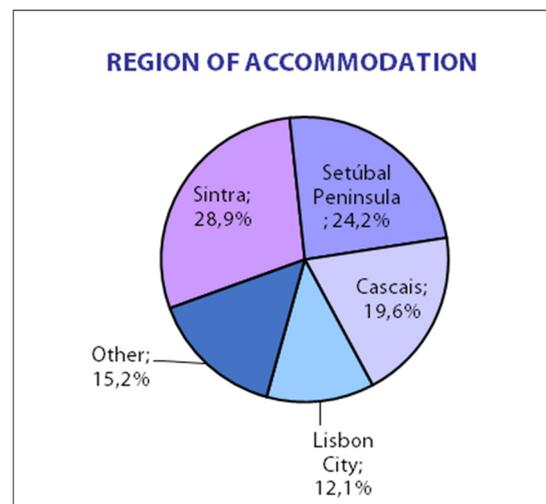
85,5% of golf players travels accompanied by their life partner, while 25,5% came with other family and 16,9% with friends. In 2018 those percentages were 40,1%, 23,0% and 71,9%, respectively.



ACCOMMODATION

28,9% of interviewed golf players chose an accommodation in Sintra and 24,2% in the Setúbal Peninsula. In 2018, those percentages were 28,1% and 9,9%, respectively. Cascais, which in 2018 had been the choice for 52,8%, this year received 19,6% of preferences.

The city of Lisbon was an option for 12,1% of these golf players (3,1% in 2018).

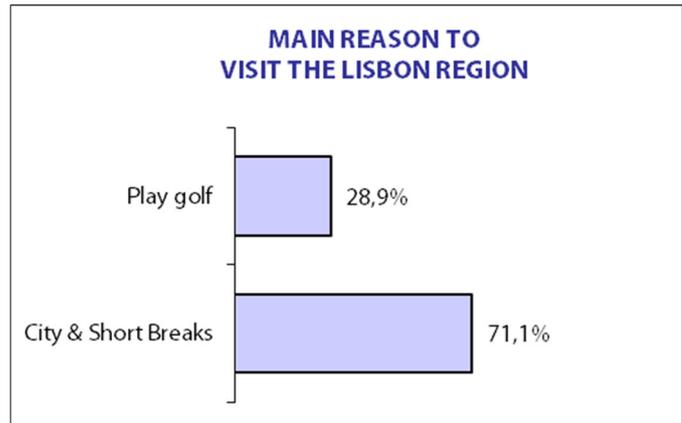


The majority of these golf players stayed for 7 nights in the Lisbon Region (8 nights in 2018). Contrary to previous years, in 2019 the average stay in the Lisbon Region was very close to the average stay in Portugal, signalling that mostly they chose not to tour outsider this region.

Longer stays (7 nights or more) received the preference of 57,1% (66,2% in 2018); while short breaks, i.e. 6 nights or less were the option of 42,9% (33,8% in 2018).

MOTIVATION

28,9% of the interviewed players in this study came to the Lisbon Region with the sole purpose of playing golf (49,3% in 2018), while the rest took the opportunity of being in Lisbon in leisure to play golf as well (50,7% in 2018).



BOOKING

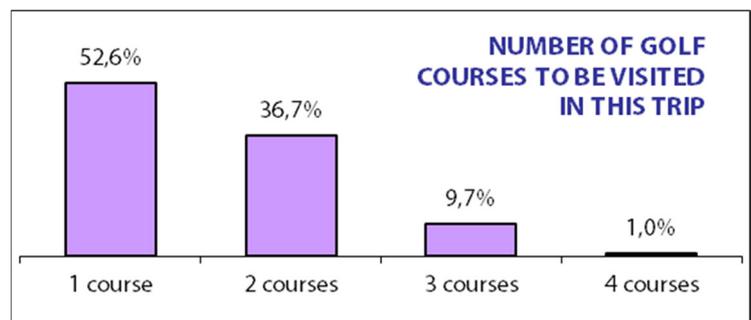
99,7% of the interviewed golf players booked their accommodation taking into account the place where they would be playing golf (67,7% in 2018). Of those, 97,3% made the reservation in their country of origin (97,1% in 2018).

In what concerns the booking of the golf course, 97,1% made the booking previously to their trip (79,6% in 2018) and in 2,6% of the cases the reservation was made already in Lisbon (9,4% in 2018). Of those who made the reservation still in their country of residence, 45,1% made it 3 to 4 weeks in advance. In 2018, 48,3% made this booking 5 to 12 weeks in advance.

98,7% of the interviewed players used the services of a golf tour operator (only 19,7% in 2018).

VISITED GOLF COURSES

52,6% of the interviewed players intended to visit only one golf course during their stay in the Lisbon Region (31,6% in 2018), while 10,7% opted to play in three or more different golf courses (37,7% in 2018).



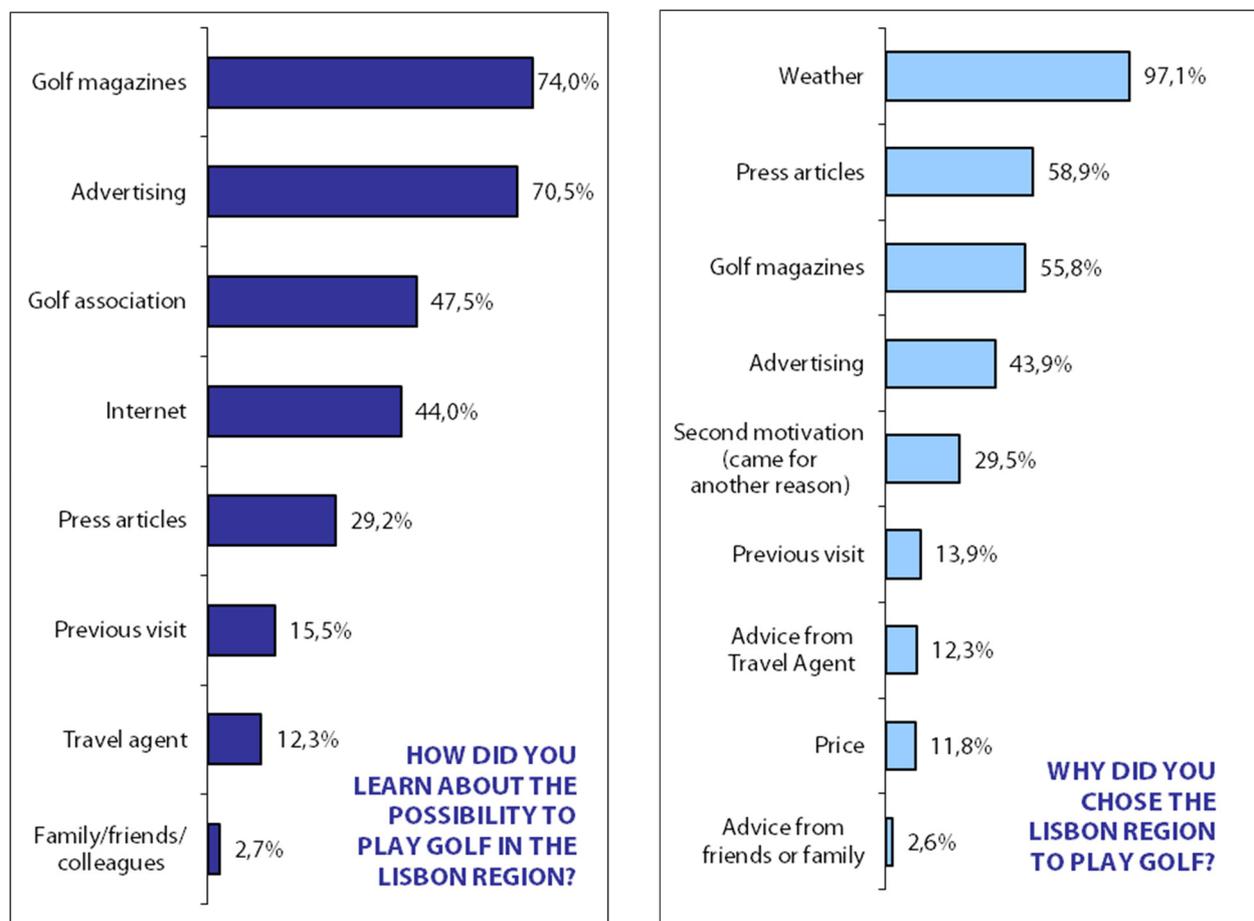
42,3% of interviewed golf players usually travel only to play golf (86,1% in 2018).

PREVIOUS VISITS

27,1% had already visited the Lisbon Region previously (19,4% in 2018). Of those, 52,4% took that opportunity to play golf as well.

SOURCES OF INFORMATION AND DECISION-MAKING

In 2019, the main source of information in what regards the promotion of Lisbon Region's potential for the practice of golf were, as in 2018, Golf magazines. On the other hand, Press articles and Family, friends or colleagues change their positions with Advertising and Golf association, which this year become more pertinente as sources of information.



In what concerns the choice of the Lisbon Region for the practice of this sport, Weather keeps the top place, as in 2018. The Advice from family/friends and Golf as second motivation, in second and third places in 2018, appear now at the end and middle of the list, respectively. In terms of importance, both the Press articles and Golf magazines increase their relevance in the selection process.

EVALUATION

The criteria most valued by foreign golf players were the Landscape of the golf course, the Green Fee and the Quality of the accommodation. In 2018, the lead was held, in decreasing order, by the Easiness to book the course, the Quality of the equipment and the Golf course service quality. With lower evaluations were the Access to the golf course from the place of accommodation and the Restaurant quality.

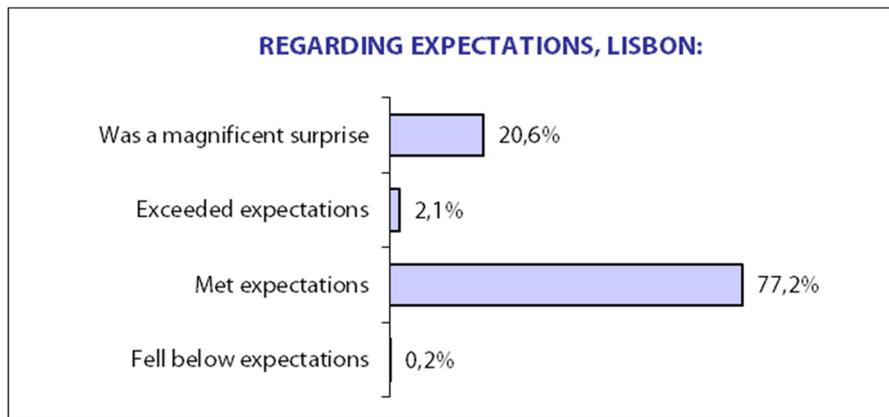
GOLF PRACTICE EVALUATION CRITERIA (from 1 to 10)	United Kingdom	Spain	France	Ireland	Germany	Scandinavia	Italy	Sweden	Finland	Norway	Denmark	The Netherlands	Austria	Canada	TOTAL
Golf course landscape environment	8,82	8,78	8,72	8,78	8,67	8,76	8,60	8,67	8,62	8,91	9,00	8,33	8,33	8,67	8,74
Green Fee value	8,41	8,41	8,44	8,52	8,35	8,53	8,37	8,72	8,23	8,55	8,56	8,00	8,83	8,50	8,44
Accommodation quality	8,33	7,96	8,23	8,33	8,47	9,00	8,23	9,00	9,00	8,91	9,11	9,00	9,00	8,33	8,32
Accommodation price	8,29	7,99	8,15	8,26	8,35	8,78	8,30	8,72	8,77	8,91	8,78	8,83	8,33	8,50	8,27
Accommodation price	8,17	7,97	8,04	8,19	8,21	8,43	8,19	8,44	8,46	8,36	8,44	8,67	8,50	8,33	8,16
Equipment quality	8,20	8,05	8,16	8,02	8,23	8,12	8,05	8,11	8,15	8,09	8,11	8,00	8,00	8,17	8,12
Golf practice costs	8,14	8,04	8,11	8,08	8,19	8,31	8,07	8,39	8,31	8,27	8,22	8,00	8,17	8,17	8,12
Golf course service quality	8,19	8,02	8,11	8,05	8,11	8,20	8,00	8,17	8,08	8,45	8,11	8,00	8,17	8,17	8,10
Easiness to book the course	8,08	8,06	8,08	8,08	8,11	8,16	8,09	8,06	8,23	8,09	8,33	8,17	8,17	8,33	8,10
Golf course technical quality	8,13	8,03	7,93	8,04	8,04	8,20	7,95	8,17	8,15	8,36	8,11	7,83	8,00	7,83	8,04
Restaurant quality	7,66	7,56	7,69	7,66	7,75	7,94	7,79	8,00	8,00	7,82	7,89	7,17	8,17	7,83	7,68
Access to golf course from place of accommodation	7,47	6,89	7,49	7,34	7,75	8,88	7,44	8,89	8,77	9,00	8,89	9,50	8,83	7,83	7,53
AVERAGE VALUE	8,16	7,98	8,10	8,11	8,19	8,44	8,09	8,44	8,40	8,48	8,46	8,29	8,38	8,22	8,14

The golf players who, on average, gave the highest score to their golf experience in the Lisbon Region were the Norwegian, the Dane and the Swede.

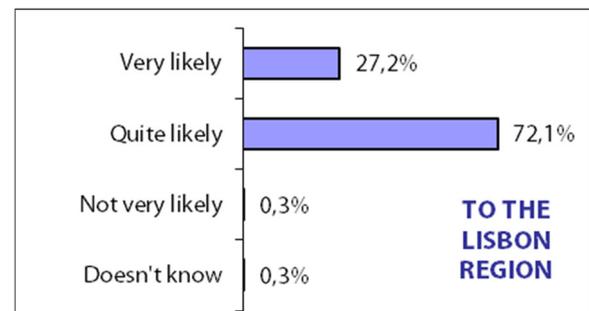
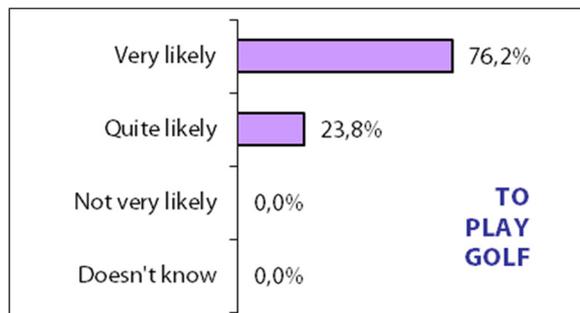
GLOBAL EVALUATION OF THE STAY IN THE LISBON REGION (from 1 to 10)	United Kingdom	Spain	France	Ireland	Germany	Scandinavia	Italy	Sweden	Finland	Norway	Denmark	The Netherlands	Austria	Canada	TOTAL
	7,93	7,89	7,75	7,94	7,93	7,94	7,86	7,83	8,08	8,00	7,89	8,17	7,67	8,00	7,90

The global evaluation of the Lisbon Region as a golf destination is of 7,90 on a scale from 1 to 10 (7,93 in 2018).

Regarding the expectation previous to their visit to the Lisbon Region, 22,6% of these golf players saw their expectations exceeded (45,2% in 2018).



PROBABILITY OF RETURNING



All of the interviewed golf players considers to be likely or very likely their return to the Lisbon Region to play golf (99,5% in 2018), with 99,4% considering it also likely or very likely the return for other leisure purposes (94,4% in 2018).

RECOMMENDATION

In what concerns the recommendation to play golf, 55,2% of the sample of foreign golf players places the Lisbon Region in the Top 5 destinations to be visited (42,1% in 2018), while 44,8% include Lisbon in the Top 10 (52,3% in 2018).

