



SURVEY TO FOREIGN  
GOLF PLAYERS

2010

## SURVEY TO FOREIGN GOLF PLAYERS

### INTRODUCTION

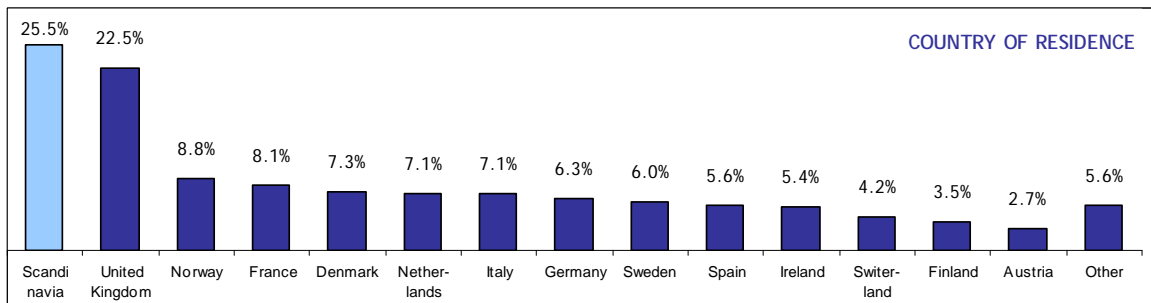
The decisive role of golf in the tourism promotion strategy of destinations and its increasing importance, namely in the Lisbon Region, has led to the need of gathering a deeper knowledge of this segment. Therefore, the Observatório of Turismo de Lisboa has initiated, in 2004, a study about foreign golf players in the Lisbon Region, in order to draw their profile.

Similarly to last years, the designed questionnaire was submitted by the company 2ii - Informática e Informação, all throughout 2010, to a total of 522 foreign golf players within a representative sample of golf courses of Lisbon Region.

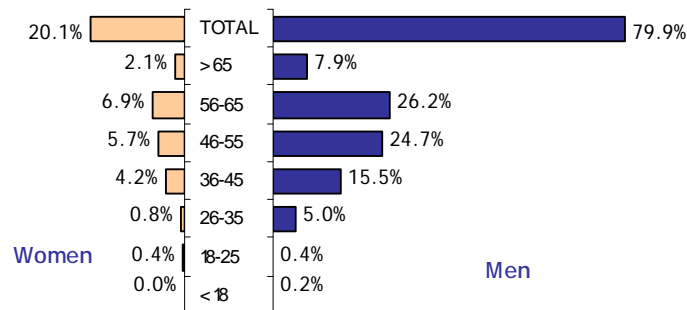
In this report we highlighting the main conclusions gathered from the data.

## MAIN RESULTS

### PROFILE OF THE FOREIGN GOLF PLAYER IN LISBON REGION



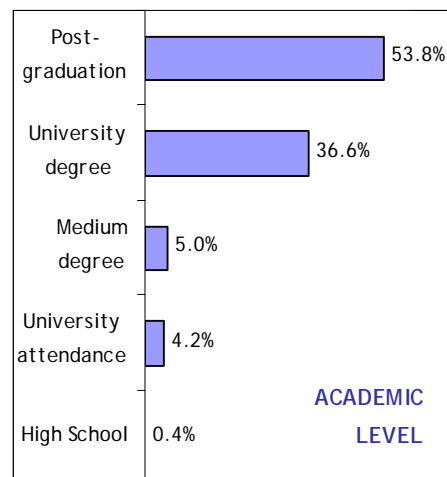
48.0% of the interviewed golf players resides in Scandinavia (Sweden, Denmark, Norway, Finland) or the United Kingdom. The first account for 25.5% of the total (23.4% in 2009), while the latter account for 22.5% (21.8% in 2009).



79.9% of the foreign golf players interviewed in the Lisbon Region are men (80.4% in 2009), with a slight relevance to the ages of 56 and 65 years old among both men and women.

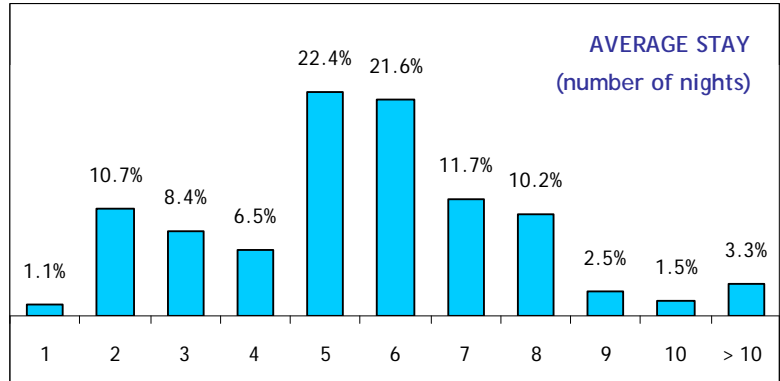
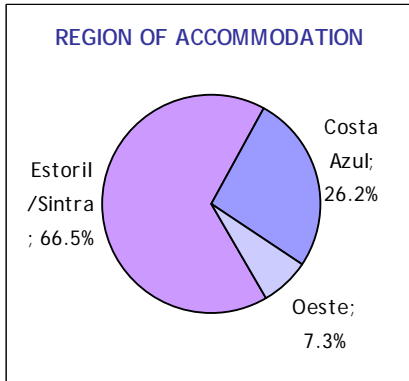
In what concerns academic level, 90.4% of the interviewed golf players holds at least a university degree (83.9% in 2009).

Upper management accounts for 40.3% of the total interviewed players (61.9% in 2009). The percentage of Retired people, which accounted for 5.6% in 2009, represented 7.3% in 2010.



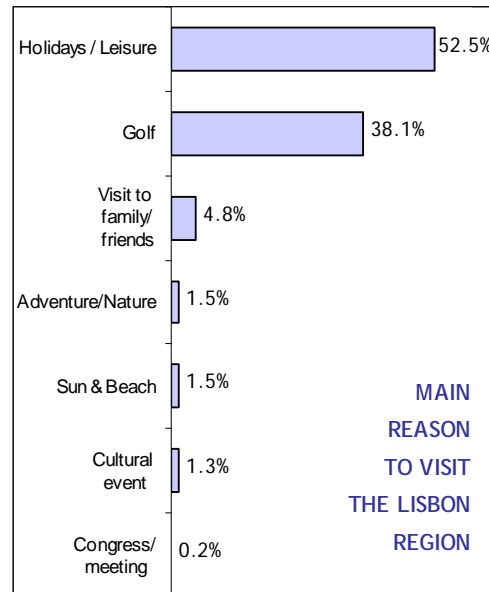
## ACCOMMODATION

The majority of interviewed golf players - 66.5% - chose an accommodation in the area of Estoril/Sintra (68.2% in 2009). 44.1% stayed between 5 or 6 nights in the Region (25.7% in 2009). 70.9% preferred short breaks, i.e. 6 nights or less (87.2% in 2009), while longer stays (7 nights or more) received 29.1% of the answers (12.6% in 2009).



## MOTIVATION

More than half the players in this study were in holidays or in a leisure trip, having taken the opportunity to play golf as well (18.2% in 2009), while 38.1% came to the Lisbon Region with the main purpose of playing golf (81.4% in 2009).



## BOOKING

96.6% of the interviewed golf players made a reservation for their accommodation taking into account the place where they would be playing golf (76.8% in 2009). From this total, 8.9% made the reservation already in Lisbon (18.0% in 2009).

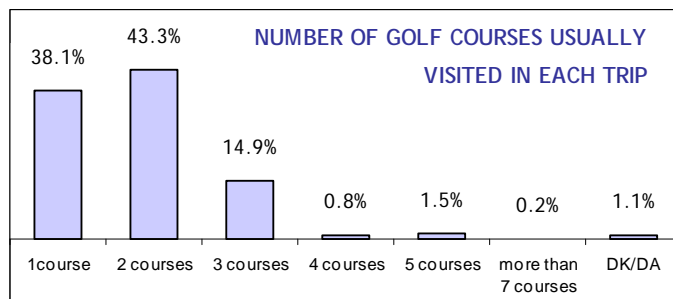
In what concerns the reservation of the golf course, 94.3% booked previously to their trip (74.9 in 2009) and in 19.3% of the cases the booking was already done in Lisbon (16.7% in 2009). 5.7% of interviewed players did not book any golf course (6.5% in 2009). Of the ones who made the reservation still in their country of residence, 28.4% made it 1 week in advance (24.1% in 2009).

76.4% of the interviewed players used the services of any golf tour operator (72.2% in 2009).

## VISITED GOLF COURSES

Although, the average stay is higher than last year's, globally, 41.6% of the interviewed players intends to visit only one golf courses during their stay in the Lisbon Region (instead of the two courses referred by 52.3% in 2009).

When questioned about the generality of their golf trips, the majority (43.3%) of players goes to 2 golf courses during their visit (49.2% in 2009).



35.7% of interviewed golf players usually travel only to play golf (79.9% in 2009).

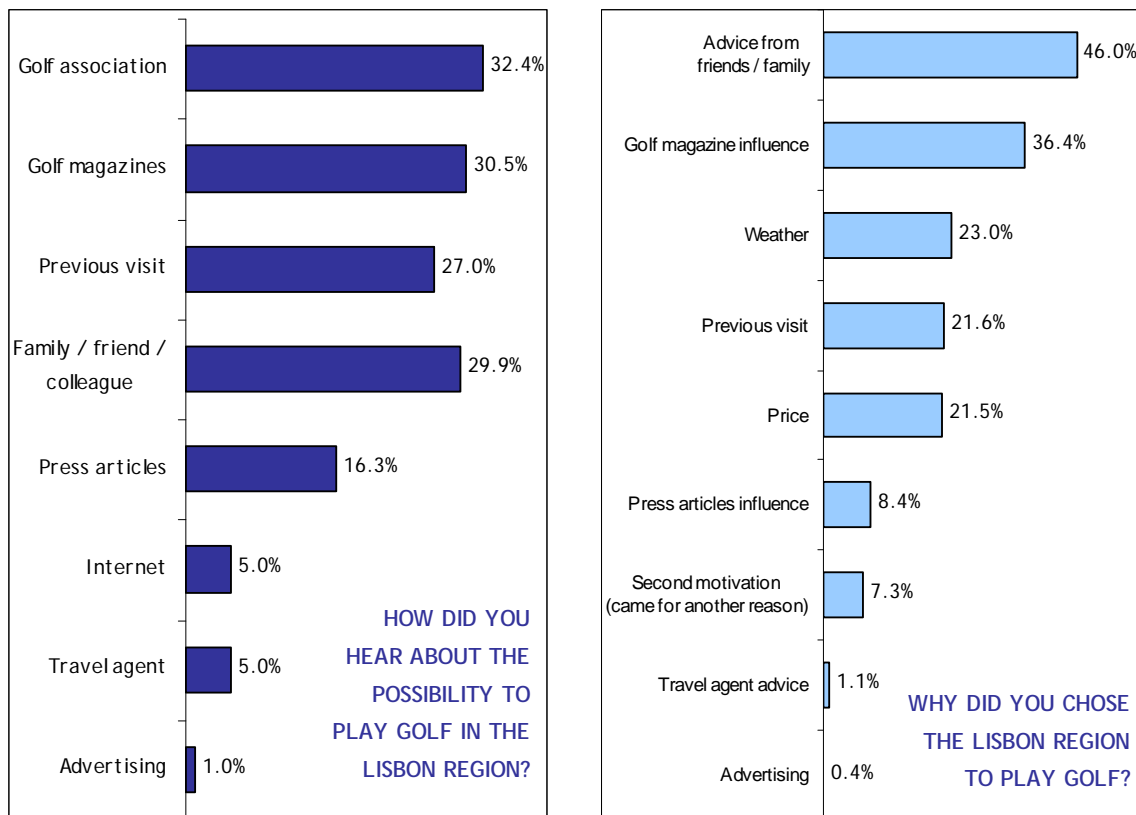
## PREVIOUS VISITS

From the set of interviews, 85.6% had already visited the Lisbon Region (84.1% in 2009). Of those, 55.7% took the opportunity to play golf.

## SOURCES OF INFORMATION AND DECISION-MAKING

Similarly to 2009, in 2010 the main source of information in what regards the promotion of Lisbon Region potential for the practice of golf was the Golf Association and Golf magazines, followed by the Previous visit.

Internet, Travel agents and Advertising are referred to again as the least important information sources in what regards golf in the region.



In what concerns the choice of Lisbon Region for the practice of this sport, Golf magazines, which last year was in 1<sup>st</sup> place, are now in 2<sup>nd</sup>, the lead being taken by the Advice from family/friends (which in 2009 was in 3<sup>rd</sup>). While Weather regains its importance as reason for choosing the Lisbon Region, the Previous visit falls from 2<sup>nd</sup> to 4<sup>th</sup> place in this analysis.

## EVALUATION

The most valued criteria by foreign golf players were the Easiness of booking (as well as in 2009) and the Access to golf course from place of accommodation. The Technical quality of the golf course, one of the higher valued criteria in 2009, comes in last place this year.

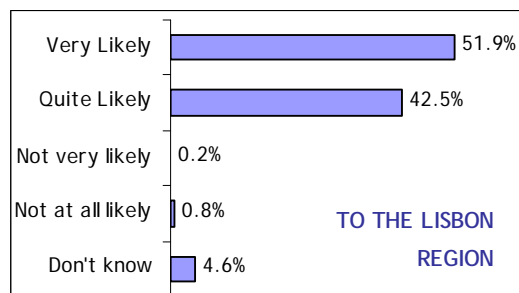
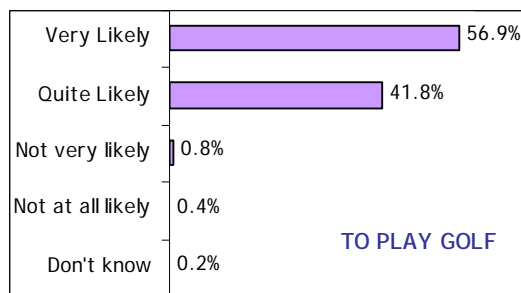
GOLF PRACTICE EVALUATION CRITERIA (from 1 to 10) <small>(by country of origin)</small>																TOTAL
	Scandinavia	United Kingdom	Norway	France	Denmark	The Netherlands	Italy	Germany	Sweden	Spain	Ireland	Suíça	Finland	Austria	Other	
Golf course technical quality	7.5	7.9	7.5	7.7	7.9	7.6	7.1	7.5	7.0	8.1	7.1	8.4	7.9	7.4	7.7	7.6
Golf course landscape environment	7.5	7.8	7.5	7.8	7.9	7.7	7.4	7.6	7.3	8.4	7.3	8.4	7.7	7.7	7.7	7.7
Golf course service quality	7.6	7.8	7.5	7.8	7.9	7.7	7.4	7.6	7.3	8.4	7.3	8.4	7.7	7.7	7.9	7.7
Equipment quality	7.7	7.8	7.7	8.0	8.0	7.9	7.6	7.7	7.6	8.2	7.6	8.3	7.7	7.6	7.9	7.8
Easiness to book the field	7.8	8.1	7.5	8.0	8.1	7.9	7.8	8.0	7.8	8.7	7.7	8.6	7.8	7.4	8.2	8.0
Golf practice costs	7.7	8.0	7.5	7.9	8.1	8.0	7.8	7.8	7.7	8.4	7.6	8.5	7.7	7.6	8.2	7.9
Green Fee value	7.6	7.9	7.6	8.0	7.9	8.0	7.7	8.0	7.4	8.4	7.8	8.5	7.4	7.5	7.9	7.9
Access to golf course from place of accommodation	7.8	8.0	7.7	8.1	8.1	7.9	7.6	8.0	7.7	8.6	7.7	9.0	7.6	7.2	8.2	8.0
Accommodation quality	7.8	8.1	7.8	8.1	7.9	7.8	7.6	8.2	7.6	8.2	7.8	8.6	7.9	7.8	8.1	7.9
Accommodation price	7.8	8.0	7.9	8.0	7.9	8.2	7.8	8.1	7.6	8.2	7.9	8.6	7.9	8.1	7.9	8.0
<b>AVERAGE VALUE</b>	<b>7.7</b>	<b>7.9</b>	<b>7.6</b>	<b>8.0</b>	<b>8.0</b>	<b>7.9</b>	<b>7.6</b>	<b>7.8</b>	<b>7.5</b>	<b>8.4</b>	<b>7.6</b>	<b>8.5</b>	<b>7.7</b>	<b>7.6</b>	<b>8.0</b>	<b>7.9</b>

The golf players who, on average, gave the highest score to their golf experience in the Lisbon Region were the Swiss and the Spanish, followed by the Danish and the French.

GLOBAL EVALUATION OF THE STAY IN THE LISBON REGION (from 1 to 10) <small>(by country of origin)</small>																TOTAL
	Scandinavia	United Kingdom	Norway	France	Denmark	The Netherlands	Italy	Germany	Sweden	Spain	Ireland	Suíça	Finland	Austria	Other	
	7.9	8.1	7.7	8.2	8.0	8.1	7.7	7.8	7.8	8.5	7.7	8.6	7.9	8.3	8.2	<b>8.0</b>

The global evaluation of the Lisbon Region as a golf destination is of 8.0 on a scale from 1 to 10 (8.3 in 2009).

### PROBABILITY OF RETURNING



98.7% of the interviewed golf players considers to be likely or very likely their return to the Lisbon region to play golf (87.4% in 2009), with 94.4% considering it also likely or very likely the return for leisure purposes.

### DESTINATION RECOMMENDATION

**99.6%** of the sample of foreign golf players recommend the Lisbon Region for golf practice (the same percentage as in 2009).