

Tourism & Travel Market Insight No. 9

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Golf Tourism

Introduction

This market insight looks at golf, a popular sporting and leisure activity in Australia. The extensive range of accessible, high quality golf courses in Australia provide many opportunities for golfers.

Market Size

In the last 12 months 14.3% of the Australian population played golf either on their last long trip or short trip or for leisure, which equates to 2.2 million people. Of this group 17.8% have played golf on more than one occasion. Over 212,000 people played golf on their last short trip (2.6% of last short trip travellers) and over 399,000 people played golf on their last long trip (4.6% of last long trip travellers).

Profile of ‘Golfing Enthusiasts’

For the purpose of this insight Golfing Enthusiasts have be defined as people who played golf for leisure and on their last long and short trip in the last 12 months (49,437 people in total). The secondary segment of ‘Keen Golfers’ is defined as people who have played golf for leisure and on at least one holiday, or on both holidays in the last 12 months (397,907 people in total).

Table 1 Characteristics of people who are “Golf Enthusiasts”

	Total been on Last long Trip	Keen Golfers*	Golfing Enthusiasts**
Market Size	8,758,000	398,000	49,000
Gender			
Male	48.1%	76.2%	80.6%
Female	51.9%	23.8%	19.4%
Household Life Cycle			
Young Singles	10.6%	11.9%	16.4%
Young Couples	8.1%	9.7%	5.8%
Young Parents	24.8%	22.1%	22.7%
Mid-Life Families	12.4%	10.6%	10.3%
Mid-Life Households	30.6%	32.1%	31.5%
Older Households	13.4%	13.7%	13.3%
Socio-economic scale			
AB Quintile	26.1%	33.7%	30.0%
C Quintile	22.4%	22.7%	22.2%
D Quintile	19.4%	18.8%	22.4%
E Quintile	17.7%	14.6%	6.7%
FG Quintile	14.4%	10.3%	19.6%

* Played golf for leisure and on one holiday, or on both holidays.

** Played golf on last short and long trip and for leisure.

- The majority of Golfing Enthusiasts are aged 25-64 (72.2%) and are predominantly male (80.6%).
- Golfing Enthusiasts are mainly from NSW (36.6%) and Victoria (35.8%).
- The majority of Golfing Enthusiasts come from the 'Visible Achievement' (22.1%), 'Traditional Family Life' (16.2%) and 'Socially Aware' (9.7%) Values Segments¹.
- Compared to all Long Trip Travellers, 'A Fairer Deal' (5.7% cf 3.5%), 'Something Better' (8.2% cf 6.8) and 'Real Conservatism' (4.5% cf 4.0%) are over-represented in the Golfing Enthusiast segment.
- In general, Golfing Enthusiasts are more likely to have worked in the garden (80.0%), played a sport (78.3%) and have done some formal exercise (51.8%) in the last 3 months.
- According to the attitudinal statements on Roy Morgan Single Source, people who play golf are more likely to enjoy taking holidays in Australia, they like to go away on weekends and are always very active on holidays, compared to the general population.

Travel Dynamics

Table 2 and the bullet points below examine the travel behaviour of the golfing market compared to all long trip travellers.

Table 2 Long Trip Holiday Behaviour

	Total Been On Last Long Trip	Keen Golfers*	Golfing Enthusiasts**
Market Size	8,758,000	398,000	49,000
Places stayed on last trip of 3 or more nights			
A.C.T.	2.5%	2.4%	0.8%
New South Wales	30.4%	33.3%	45.3%
Victoria	18.0%	18.5%	21.5%
Queensland	23.0%	21.9%	17.9%
South Australia	7.1%	6.1%	6.3%
Northern Territory	2.1%	1.4%	-
Tasmania	2.9%	2.3%	3.1%
Western Australia	7.7%	5.4%	6.3%
Total Australia	81.2%	78.3%	92.4%
Total Overseas	16.2%	12.2%	4.9%
Can't say destination	3.9%	3.0%	3.4%
Total Been On Long Trip (last trip)	100%	91.2%	100%
Cost per person per night on Last Long Trip (\$)	\$91.45	\$84.96	\$73.65
Number of nights away on Last Long Trip	14.47	14.94	13.97

* Played golf for leisure and on one holiday, or on both holidays.

** Played golf on last short and long trip and for leisure.

¹ Developed in conjunction with Colin Benjamin of The Horizons Network

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- Compared to all Long Trip travellers Golfing Enthusiasts are more likely to have visited NSW (45.3% cf 30.4%) and Victoria (21.5% cf 18.0%).
- On their last holiday of three or more nights, Golfing Enthusiasts mainly travelled with a partner/ as a couple (37.2%) or as a family with children (30.0%).
- The majority (68.9%) of Golfing Enthusiasts travelled by their own car or 4WD on their last long trip.
- Golfing Enthusiasts were most likely (45.2%) to have stayed with family and friends.
- On average \$73.65 was spent per person per night by Golfing Enthusiasts on their last trip, which was lower than the average of all last long trip travellers. This is influenced by the fact that Golfing Enthusiasts are far more likely to travel domestically than overseas.

Media

The list below shows selected magazines more likely to be read by a significant proportion of Golfing Enthusiasts, compared to Long Trip Travellers in general. (i.e. Index is greater than 125 and Reach is greater than 10%)

- Golf Australia (12.3% cf 0.7%);
- Golf Magazine (10.7% cf 0.6%);
- Australian Golf Digest (14.3% cf 0.9%);
- AFL Record (11.6% cf 1.8%);
- Austar (12.5% cf 4.3%);
- Sunday Sun-Herald Television (14.8% cf 8.9%);
- Royal Auto (12.6% cf 7.6%);
- Sunday Herald Sun TV Extra (12.6% cf 7.6%);
- Sunday Telegraph TV Guide (16.3% cf 10.3%);
- Sunday Magazine (24.7% cf 16.5%);
- Foxtel Magazine (13.4% cf 9.2%); and
- Good Weekend (19.8% cf 15.5%).