

CONSUMER RESEARCH

A glimpse of how golfers' behavior affects the business of golf facility maintenance and management.

EMERGING INTERNATIONAL DESTINATIONS

As part of the KPMG 2008 Golf Travel Insight report conducted in spring 2008, more than 80 specialist golf tour operators in 21 countries were surveyed to find out where they thought the most popular destinations would be in the coming years.

Portugal and Spain, already established tourist destinations, remain firm favorites. However, some surprising destinations are catching up fast.

Turkey ranked third on the list of future golf hot spots, and was closely followed by Dubai – despite figures that reveal the United Arab Emirates has the most expensive green fees in the entire EMA region.

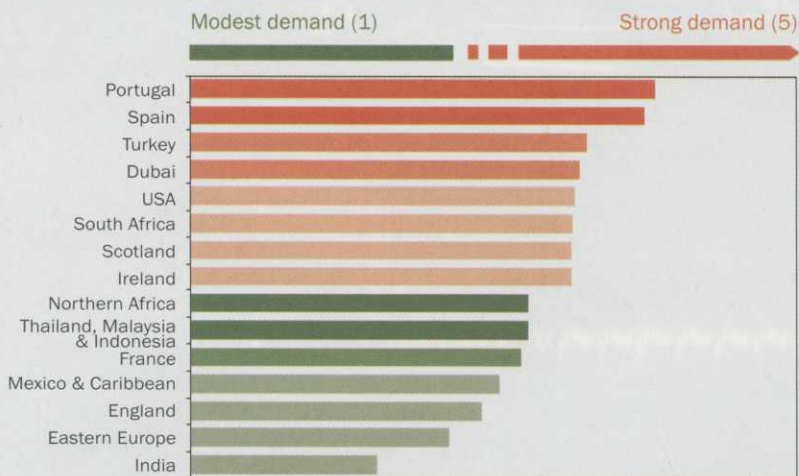
The news for established golf destinations such as Scotland and Ireland was not so good, as operators expect stagnation in inbound golf tourism here.

"From our research it seems well established destinations are not losing market share thanks to their deep golfing traditions and the quality of their golf, but the growing competition doesn't leave much room for further growth," says Andrea Sartori, head of KPMG's Golf Advisory Practice for the EMA region. "Thailand, Malaysia and Indonesia were widely tipped as emerging destinations, and the quality of service in the U.S., combined with a favorable exchange rate at the time of the survey, makes America very attractive to European holiday golfers."

Source: KPMG Golf Advisory Practice's Golf Travel Insight in EMA 2008

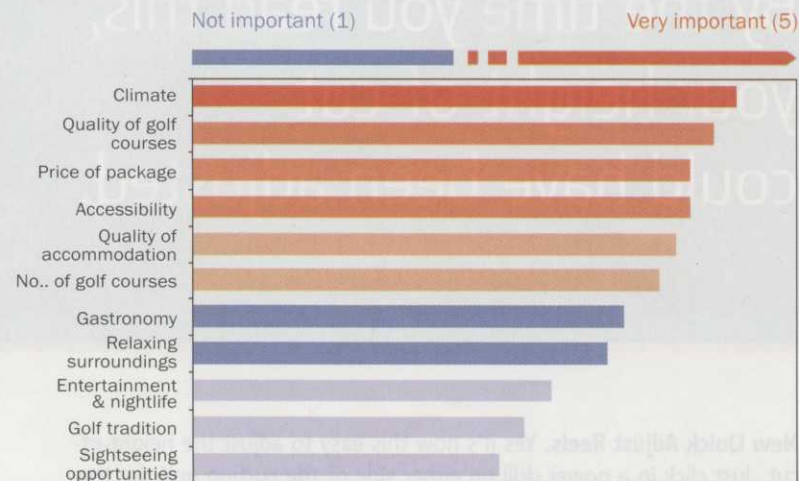


Hot spots for golf tourism in upcoming years



Source: Golf Travel Insight 2008

How golf tourists choose their golf destination



Source: Golf Travel Insight 2008