

CONSUMER RESEARCH

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

Golf Travel Insights 2010

Whether as a primary motivation for a vacation or simply as a secondary activity, golf attracts millions of travelers worldwide.

However, while the recent economy is primarily to blame, 38% of golf tour operators surveyed by KPMG have experienced a fall in demand (up from 10% in the summer of 2008). While 8% reported demand to be stable, 54% still noticed an increase

in the number of golf tourists (albeit down from 73% in 2008).

Golf tourists are generally big spenders who are looking for quality services, but they expect great value for their money. Therefore, it is important to understand their needs and behaviors.

Here are some additional findings from KPMG's Golf Travel Insights 2010 study.



Golf tourism hot spots:



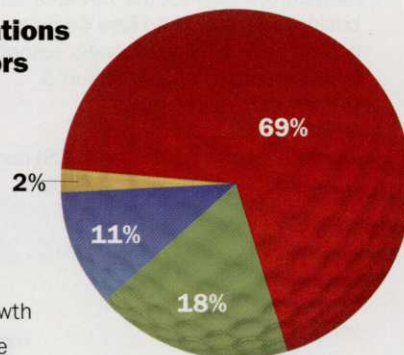
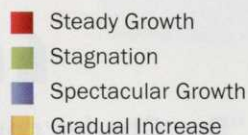
Based on a scale of 1 (modest demand) to 5 (strong demand)

Key factors when choosing a golf destination:



Based on a scale of 1 (not important) to 5 (very important)

Future expectations of tour operators regarding golf tourism growth:



Source: NGCOA, contact Mike Tinkey, mtinkey@ngcoa.org, with any questions.