



# BRAND USA - IAGTO Webinar

Global Golf Tourism & Driving Golf Travel to the USA





THE GLOBAL GOLF TOURISM ORGANISATION

**Peter Walton**

Chief Executive

IAGTO



THE GLOBAL GOLF TOURISM ORGANISATION



VisitTheUSA.com

# IAGTO Golf Tour Operators



Established 1997

2531 member companies and organizations in 96 countries

Including 208 in the USA!





# IAGTO Golf Tour Operators

656 IAGTO Golf Tour Operators in 62 countries

Controlling 87% of the global market

Carrying 1.9 million golfers

Generating USD 2.5 billion annual sales



# IAGTO Golf Tour Operators

320 IAGTO Golf Tour Operators

in 49 countries

feature, promote & sell Golf Vacations to the USA

# Golfers... Where are they??

## Global Golf Tourism Markets

The World's No.1 Sports Tourism Sector



# Golfers... Are they all the same??

## Golfer & Vacation Categories

### **Regular Golfers**

People who play golf regularly enough to be able a vacation with friends playing golf every day

### **Avid Golfers**

The 'core' golfers who play at least once or twice a month and seek out memorable golf experiences at home and abroad

### **Golf Vacation**

A vacation where golf is the primary purpose of travel

### **Vacation Golf**

A vacation where golf is played only once or twice and where golf is therefore not a major deciding factor in the choice of destination

- Trophy Hunters
- Buddy Golf
- Golfing Couples
- Golf Societies
- Corporate Golf
- Ladies Groups
- Golf Cruises
- Golf & Culture
- Golf 4 Families
- Tournament Golf
- Event Golf



# The Value of Golf Tourism

30% of regular Golfers will take a Golf Vacation this year





# The Value of Golf Tourism

50% of regular Golfers will play golf on Vacation



# The Value of Golf Tourism

## Golfers Spend More



Golfers spend 120% more per person per day in destination than a general leisure tourist.

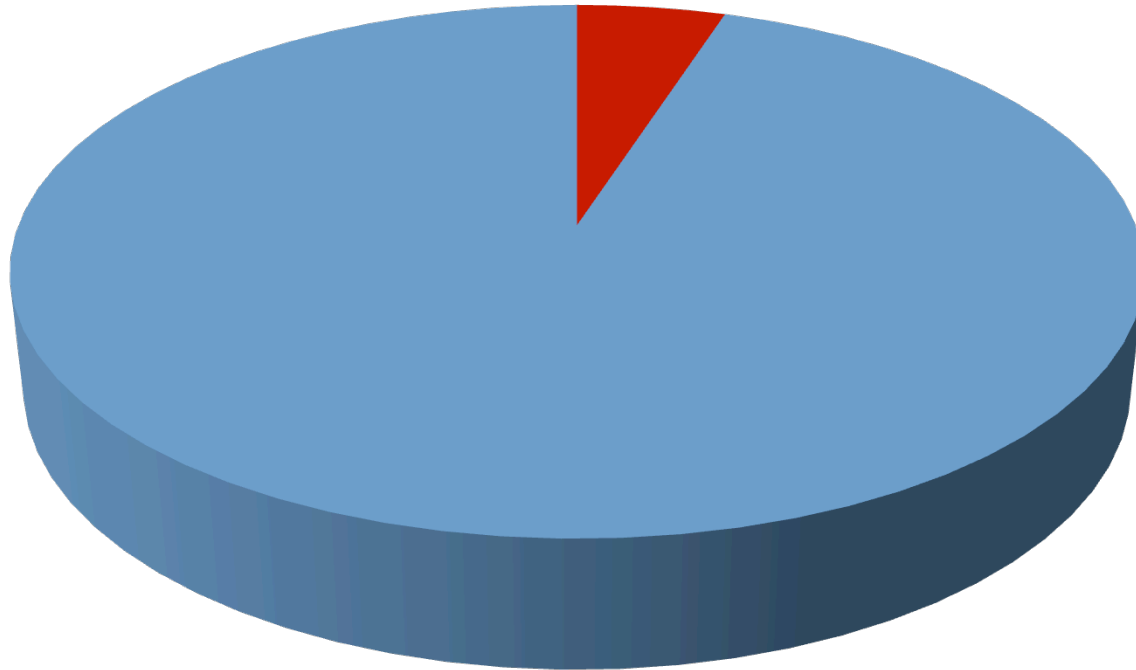
**More than double the normal spend!**



# The Value of Golf Tourism

## An Influential Market

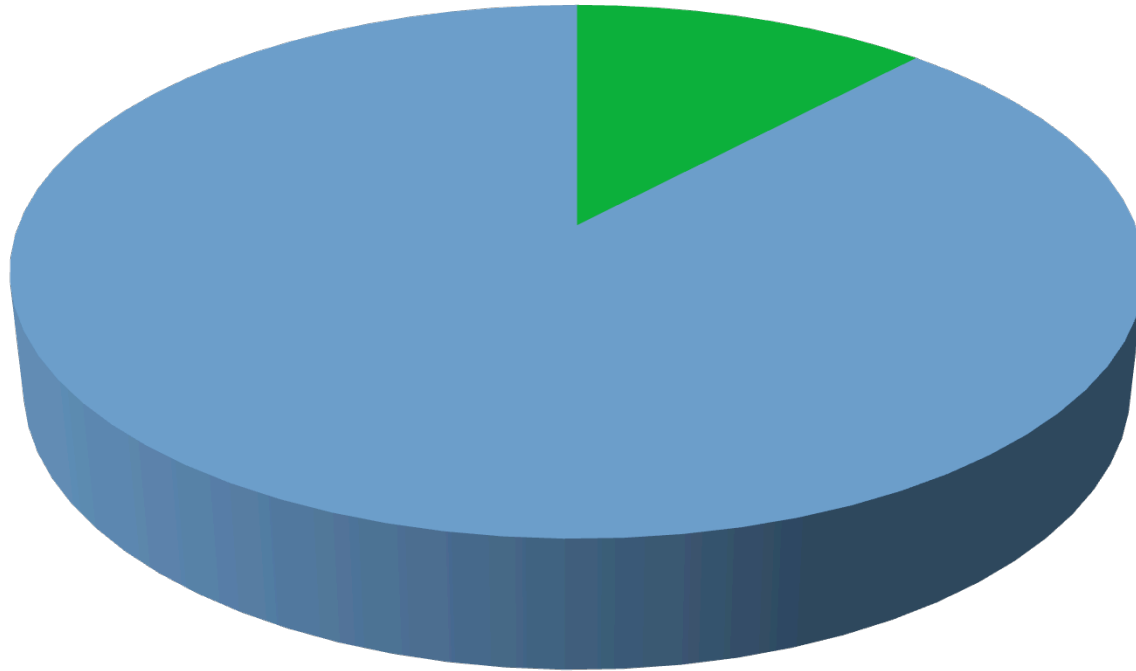
>5% of Adults in Established Markets play Golf



# The Value of Golf Tourism

## A Key Tourism Driver

They are responsible for up to 12% of total travel expenditure!



# The Value of Golf Tourism

## More than a Niche Market

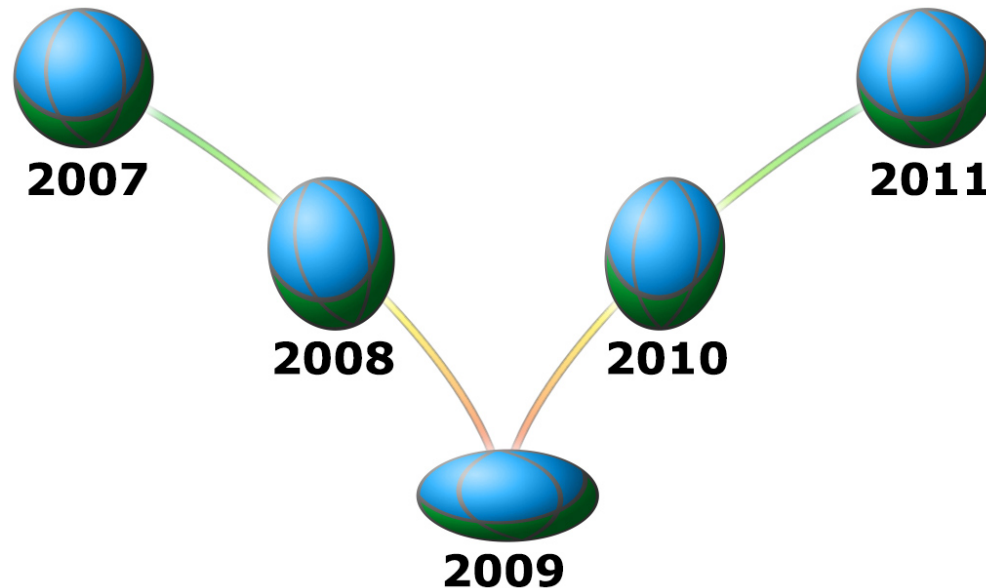




# The Value of Golf Tourism

## Golf Tourism is Resilient

The golfer will not be denied their annual golf travel fix!

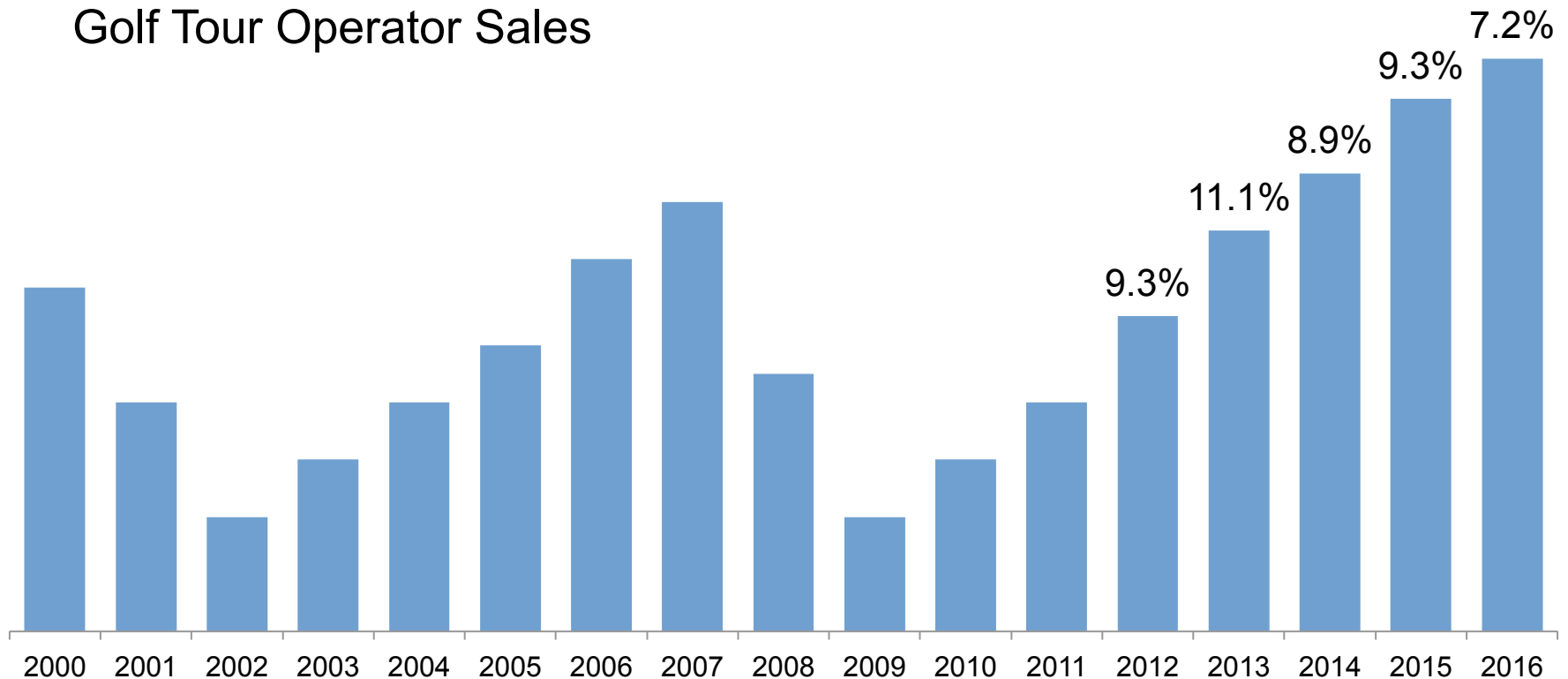


Golf tourism repeatedly bounces back quicker than other tourism sectors.

# State of the Market

The global golf travel industry is enjoying a sustained period of continual growth

## Golf Tour Operator Sales



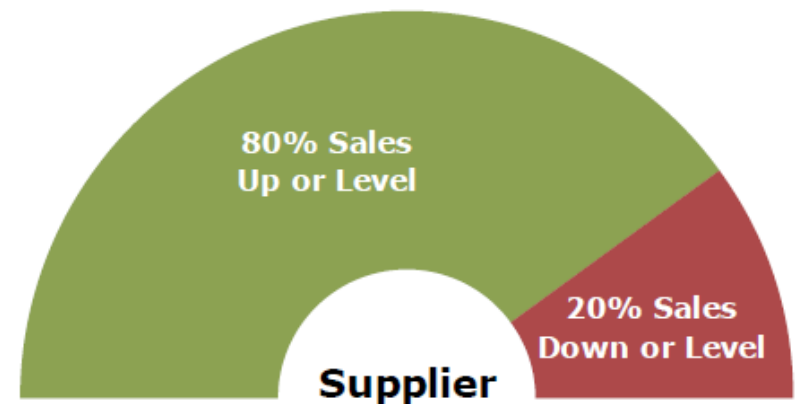
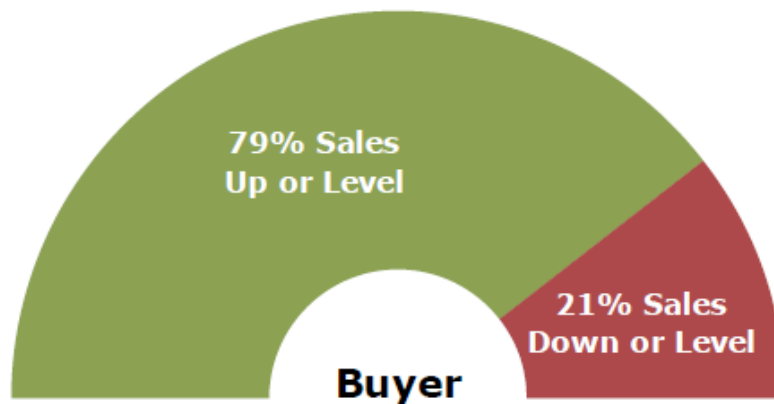
# State of the Market

## Supplier Sales

Golf visitor arrivals in 2016 for IAGTO member golf courses, golf resorts and hotels were up globally by an average of 4.5%. Growth enjoyed by suppliers is always lower than that reported by operators because golf courses and hotels have a finite number of rooms and tee times to sell, whereas for golf tour operators there are no such limits.

**Supplier sales:**  
**↑ 4.5%**

A majority of companies enjoyed growth in 2016



# State of the Market

## Forward Bookings looking good for 2017

Every 3 months we ask our members how many forward bookings they have compared to the same time the previous year. In January 2017 the news was positive from both outbound golf tour operators and suppliers.

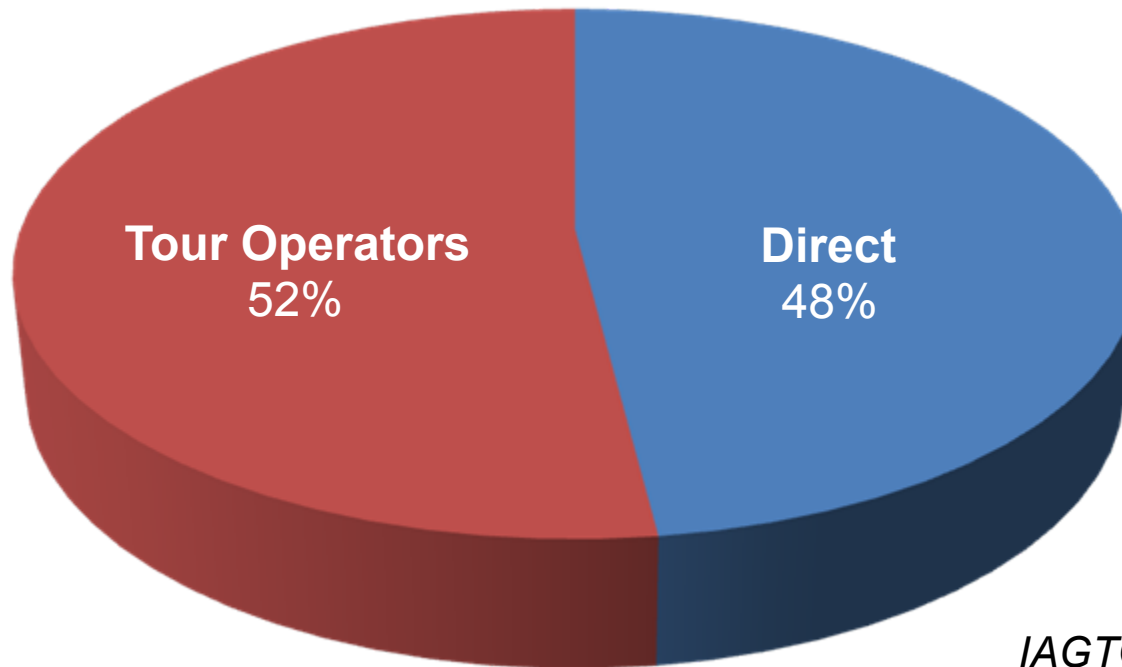
**Golf Tour Operators: ↑ 7.1%**

**Suppliers: ↑ 5.7%**

# State of the Market

## Booking Channels

Golf visitors to 350 Global Sellers



*IAGTO Annual Survey*

# Key Markets

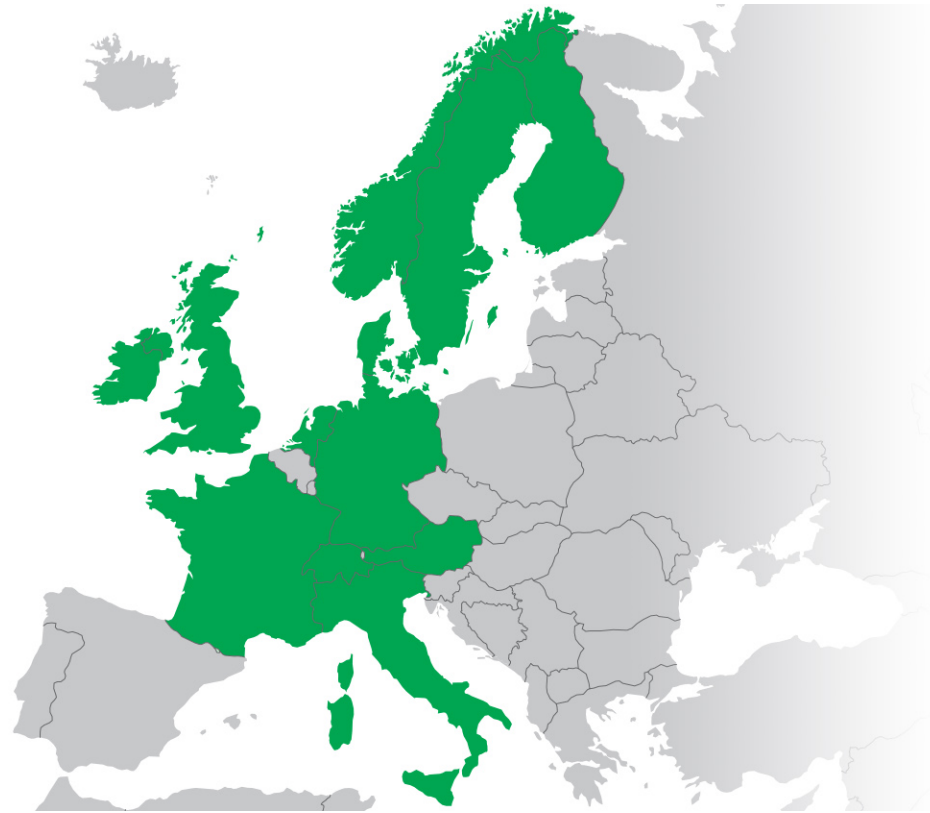
## The Americas





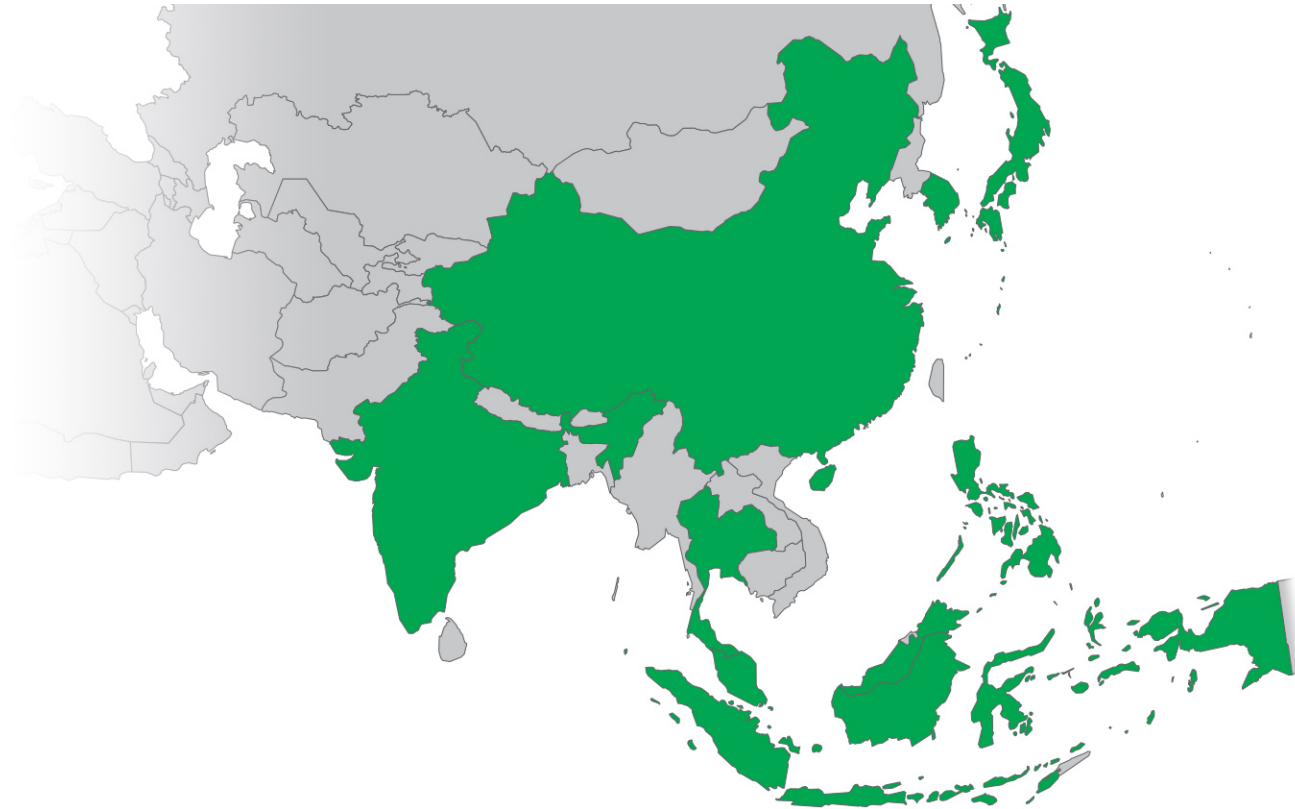
# Key Markets

## Europe



# Key Markets

## Asia Pacific



# Key Markets

## Asia Pacific



# The Key to Success

## The QAPP Principle!

### Quality

- Quality of Product
- Quality of Service
- Quality of Professional Relationships

### Access

- International Access to Gateway City
- Access from Gateway City to Accommodation Hub
- Local Access from Accommodation to Golf Courses
- Access to Golf Courses for non-member visitors

### Price

- Green Fee rates in comparison to neighbouring competition
- Green Fee rates in comparison to international competition
- Accommodation & Airlift prices and availability

### Promotion

- Even if the destination scores highly on Quality, Access & Prices, if you don't tell anyone about it, then people won't come!

# BRAND USA - IAGTO Partnership

Brand USA and IAGTO teamed up in 2015 to promote Golf Tourism to the USA which began with the first National Golf Tourism Survey

1. Benchmarking the value of Golf Tourism region by region
2. Calculating the Capacity for Growth



# BRAND USA - IAGTO Partnership

## Brand USA - IAGTO National Golf Tourism Survey

The survey secured the support of over **70** State Tourist Boards and Regional CVBs

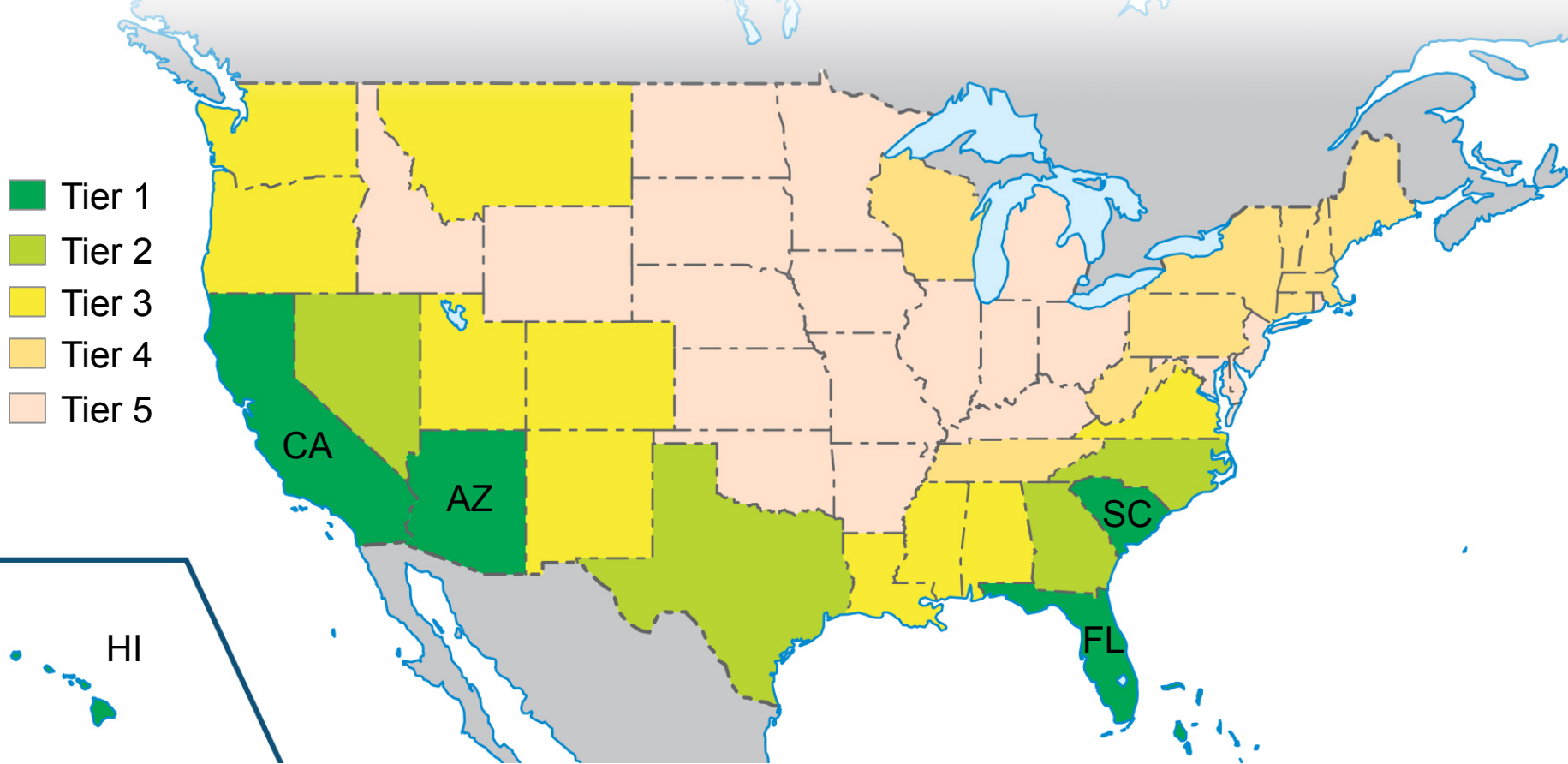


Over **230** Golf Courses completed the survey



# USA Golf Tourism Survey

Relative popularity according to international operators in 2016



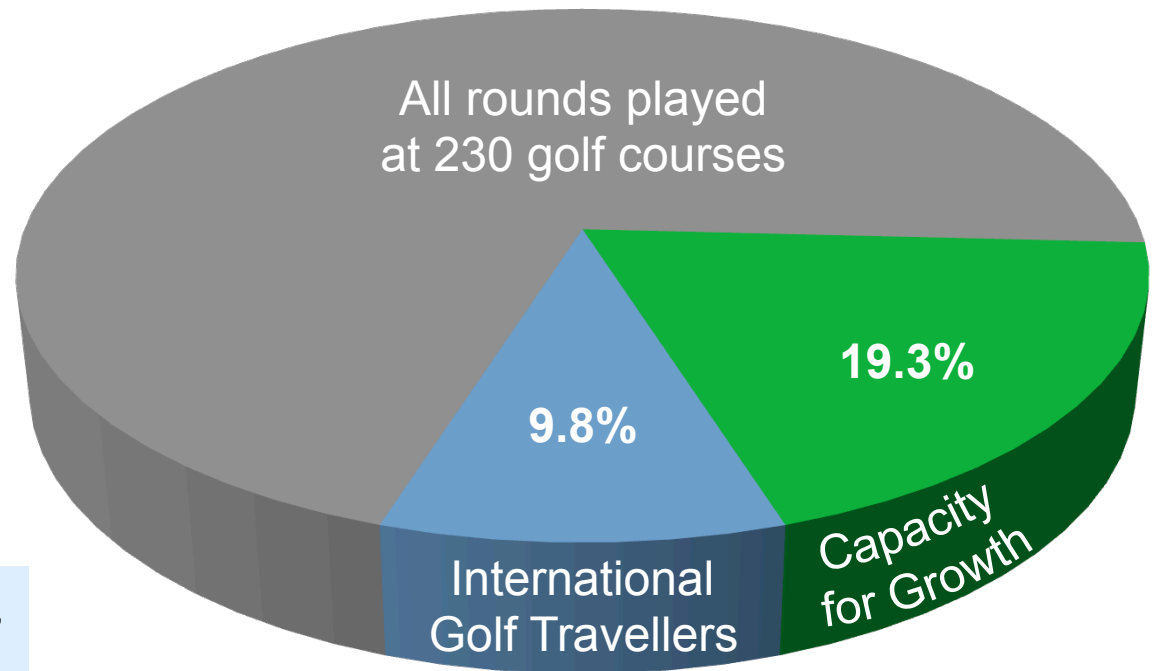
# USA Golf Tourism Survey

## Key Findings

**96%**

of courses keen to receive more domestic & international golf visitors.

**International visitors spend 18% more in clubhouse**



# Golf Destination Support

## Calculate Value & Track Golf Tourism

Do you know the value of golf travel (domestic & international) to your destination?

YES / NO

### **IAGTO Monthly Golf Visitor Round Tracker**

We provide an online tool and support to help you calculate and monitor golf visitor rounds

[www.iagto.com/brandusa](http://www.iagto.com/brandusa)

# Golf Destination Support

## Connect with Operators & Media

Would you like to connect with Golf Tour Operators & Golf Travel Writers?

**YES** / NO

**Join 36 USA CVBs & State Tourist Boards as IAGTO members.**

**[www.iagto.com/benefits](http://www.iagto.com/benefits)**

# 9<sup>th</sup> Annual NAC

150 Buyers from 36 Countries



**NAC**  
North America Golf  
Tourism Convention



25-28 June 2017, Miami : [www.iagto.com/NAC](http://www.iagto.com/NAC)







# Brand USA Golf Programs



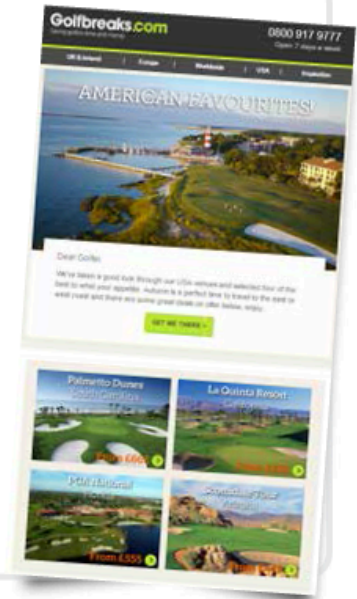


# GolfBreaks.com 2017

**Golfbreaks.com applies a multi-channel approach to all partner marketing programs, including print, CRM, digital, social media and Sky television.**

## What's Included?

- ✓ **Sky television advertising** - dedicated adverts promoting a destination to a targeted demographic of affluent, high spending males across 119 Sky TV channels including sports and dedicated golf channels. Campaigns start with a minimum of 600,000 impressions.
- ✓ **US Golf Travel Guide** - a print and online guide focused on the USA's best golf destinations distributed through key media channels. Print distribution: 25,000 sent direct to a targeted section of the Golfbreaks.com database. 65,000 copies distributed across 2,000 UK golf clubs in connection with the UK's leading golf magazine
- ✓ **Banner advertising** - display advertising on the UK's leading independent golf travel websites, open web advertising (targeting golfers across the world's most popular sites), and exclusive access to www.PGATour.com the world's largest golf website. Programs start at 400,000 impressions.
- ✓ **Targeted email** - focused campaigns placing product in front of golfers that have a keen interest in travel. Access to the Golfbreaks.com database of 230,000 and partners such as Golfshake.com (90,000), Teeofftimes.co.uk (210,000), and a base of 5,000 PGA Golf Professionals gives an unrivalled reach into the golf market.
- ✓ **Bespoke social campaigns** - targeted social campaigns running over multiple channels raise awareness and engagement with a destination and its venues, golf courses and local attractions - programs vary from 50,000 to 300,000 impressions per campaign.



# Golfbreaks.com

# GolfBreaks.com

- Inquiries up 29% YOY
- Net Revenue: - \$635,944 – nearly 50% YOY uplift
  - 20 partners
  - Combination of: Broadcast TV, paid digital channels and print targeting
  - Total print distribution 785K – Readership exceeded 1.6 million plus digital distribution
  - 2.2 Million impressions



# IMG Video

Align with strategic partner, IMG, to provide golf-themed videos with a global distribution reach of over 322 Million



# Sojern – Golf Campaign

**Sojern is travel's leading data-driven performance engine –  
Bringing more golfers to your destinations**



## Identify the Right Data

Through our strategic partnerships with global OTAs, airlines, hotels, and meta sites we build our profiles to decipher the where, when, and why people plan to travel.



## Build Your Audience

Activating this data to find your in-market International travelers, the Sojern Traveler Platform drives campaign performance.



## Engage & Convert

Our learning algorithms continuously optimize for targeting and conversions as we message across digital channels where travelers engage.



## Actionable Insights

Our reporting suite provides data-driven insights to inform future business decisions and account for media spend and track visitation.

**Right Message + Right Format + Right Traveler + Right Time**



# WHAT'S NEXT?

**You can contact your service representative at Brand USA**

or

**Devon Dow**  
**[ddow@thebrandusa.com](mailto:ddow@thebrandusa.com)**

**Thank You!**







Thank You!

