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Golf tourists in South Africa: A demand-side study of a niche market in sports tourism

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Abstract

The targeting of tourism market segments is considered to increase repeat visitations to tourism destinations because it allows destination marketers to accurately determine the needs and expectations of targeted tourists, develop more effective marketing strategies, which in turn, assists with ensuring that the targeted tourists segments support and return to the destination. Consequently, the aim of the study was to determine the profile of golf tourists attending an international golf event in South Africa by shedding some light on their key trip-related and general golf tourism behaviour patterns. To date, most research undertaken has focused on product- driven research concerned with golf course facilities and the marketing thereof and little emphasis on demand-side research concerning the golf tourist. Personal interviews were conducted using a structured questionnaire involving 314 golf tourists selected through a systematic random sampling technique. The paper investigates the level of development of golf tourism, analyses the golf tourism market and highlights critical factors for its success, in South Africa.

Keywords: Golf tourism; Sport tourism; South Africa; Demand-side study; Profiling

1. Introduction

In 1994, with the end of apartheid, the South African government undertook to make tourism one of the country's leading industries in the creation of employment and the generation of foreign income (WTTC, 2002). Although tourism destinations are increasingly proclaiming the importance of sports tourism as part of their destination development strategies in South Africa, according to Economic Review (2004), Hotel and Restaurant (2004), and Mabindla (2004), indications are, according to Sheard and Veldtman (2003) that existing research is superficial and currently does not provide much detail relating to comparisons of sub-sector, or niche markets, within the sport tourism industry. The generality of the available information results in very little planning feasible for niche markets, by destination management organisations that are based on empirical research.

The South African golf tourism industry, according to Sheard and Veldtman (2003), is an important sub-sector of the sports tourism industry that has seemingly come about spontaneously as there seems to have been no concerted planning effort to develop and market the country as an international golf tourism destination. To date, most research undertaken by the South African golf industry has focused on product-driven research concerned with golf course facilities and the marketing thereof, and little emphasis on demand-side research concerning the golf tourist. Consequently, the aim of the study is to determine a demand-side profile of golf tourists attending an international golf event in South Africa and to shed some light on their key trip-related and general golf tourism behaviour patterns. The target marketing of niche tourism segments is considered to encourage repeat visits by target markets to tourism destinations, because, according to George (2001), it allows destinations management organisations to focus on tourists' needs and expectations; it

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assists with the development of an effective marketing mix, and it enables more effective market positioning, thereby ensures targeted tourists know about and possibly purchase the offering.

An overview (in Sections 1.1–1.4) is provided of the relationship between sports and tourism within the global and South African context; including, a brief discussion concerning international golf tourism; and golf tourism in South Africa.

1.1. Sports and tourism: an overview

Sport tourism is a relatively new concept although its scope of activity is far from recent. In the sports industry, sports tourism is considered as a means to capitalise on the growth and interest in non-competitive and competitive sport by aligning the forces with sport, recreation and tourism professionals, and organisations. Sports tourism can be broadly described as including travel away from one's primary residence to participate in sports activity, for recreation or competition purposes, travel to observe sport at grassroots or elite level, and travel to visit a sports attraction such as a sports museum, for instance (Delpy Neirotti, 2003). Sports tourism is considered a multi-billion dollar global business and the fastest growing sector of the US$4.5 trillion global travel and tourism industry. Destinations are increasingly relying on the visiting golfer or rugby supporter, for example, with sports tourism in some destinations possibly accounting for as much as 25% of all tourism receipts (Sportbusiness, 2004). The importance of sports tourism as a target market is further emphasised by media statements of the World Tourism Organisation (WTO) and the International Olympic Committee (IOC), which in 2004, announced their commitment to reinforce their partnerships on collaboration in the sports and tourism domain. They stated that ''tourism and sport are interrelated and complementary'' and that ''both are powerful forces for development, stimulating investment in infrastructure projects such as airports, roads, stadiums, sporting complexes and restaurant-projects that can be enjoyed by the local population as well as tourists who come to use them'' (WTO, 2004, internet). Although much research has been done on the sports and tourism link, according to Weed and Bull (2004), it tends largely to focus on one dimension of sports tourism, namely, holidays involving sport either as participant or as a spectator. It is, however, underscored that there are two types of sports-related tourism: firstly, where sport is used by destinations seeking to develop their tourism profiles, and secondly, where tourism has emerged spontaneously as a result of sports activity. Weed and Bull (2004, p. 37), provide a conceptualisation of the sports tourism phenomenon as: ''a social, economic and cultural phenomenon arising from the unique interaction of activity, people and place''. It is concluded by Gammon and Robinson (2003, p. 25) that sports and tourism ''is not just about the management and operation of mega events; it also concerns offering consumer-specific sports and tourism-related services and experiences'' to the sports tourist.

1.2. Sports tourism in South Africa

The 1996 Tourism White Paper specifically identifies the sports tourism sector and encourages the development of sports tourism products as offering good potential for developing a vibrant specialist tourism sector (South Africa, 1996). It needs to be underscored, however, that no direct reference is made to sports tourism in the Tourism Growth Strategy (South African Tourism, 2002) or the 2004–2007 Domestic Tourism Growth Strategy (DEAT[1], 2004). The findings of the Global Competiveness Project (DEAT[2], 2004) suggest that International (and South African domestic) tourists consider sport offerings (the sport types that tourists participate in or are spectators of are not indicated by the said report) as low desired experiences and indicate low usage. This report furthermore finds that the South African tourist market is underserviced in six key market areas: Youth, Eastern European, Family, Domestic Tourism, African Tourism and Special Interest/Niche Tourism. Sport tourism (a Special Interest/Niche Tourism category) is indicated, by the report, as requiring attention for market growth and development in South Africa.

The South African Government, through Sports and Recreation South Africa (SRSA), released in 2004 its Strategic Plan 2004–2007. One of the objectives of this Plan is to use sport as a medium for achieving positive social and economic outcomes for South African society (South Africa, 2004) and, through this objective contribute toward resolving issues of national importance including the HIV/AIDS challenge, unemployment and economic growth via sports tourism. All in all, the SRSA Strategy's primary objective is the development of sport and recreation; however, tourism is largely considered in a supportive role. The SRSA sports tourism strategy for South Africa is considered to rest on four pillars: bidding for hosting major sports Events such as the 2010 World Cup Soccer; promoting home grown sports Events such as the Comrades Marathon abroad to attract more participants and spectators; promoting South Africa as a destination for training by Northern Hemisphere athletes during their winter months; and, the promotion of South Africa as a destination for social participants in sports, especially in terms of exploiting the country's tourism resources such as golf courses, beaches and hiking trails, amongst others. The thinking behind the strategy is to create opportunities for sustainable employment in the sports sector thereby making a contribution toward the development of a corps of sports tourism workers that could provide a basis for a strong sports tourism sector according to Balfour (2003) and Oosthuizen (2004).

To date, most research undertaken by the South African sports and tourism industries has focused on supply-side research concerned with the improvement of sport performance and the marketing and promotion of a variety of sports offerings and little (or secondary) emphasis on sports tourism. Furthermore, it would seem that the South Africa Sports Tourism (SAST) initiative, launched after the release of the 1996 Tourism White Paper to capitalise on South Africa's sporting successes and re-entry into the world tourism scene, has not been in operation since its inception in 1997 (Swart, 2005). Considering that South Africa has been involved in sports tourism for a number of decades, the development of the South African sports tourism is, however, in its relative infancy and is not as well researched as compared with some relatively better-established sports tourism destinations such as Australia and the United States of America (for example, the study of Ritchie & Adair, 2004).

1.3. The global golf tourism market

Globally, golf tourism is considered a major tourism activity both as a direct form of special interest travel and as an adjunct to other forms of travel (Hall, 1992). It is estimated by Readman (2003) that there are over 60 million golfers across the world. Of this, 44% of the market is located in the United States of America (USA), 25% in Japan and 12% in Europe. It is further estimated that these golfers play on more than 30,000 golf courses of which 16,000 are found in the USA. In the past few years the popularity of golf has grown fast and the influx of tourists to international golfing destinations has grown in tandem. The value of golf tourism has grown by 8% in 1998–1999 alone and is currently estimated at US$10 billion annually (excluding the Far East market). Golf, therefore, represents the largest sport-related travel market with this market served by its own trade association, the International Association of Golf Tour Operators (IAGTO) (Readman, 2003). Since 1989 there has been a 50% increase in the number of global golf tourists. One out of every two adult golfers play at least one round of golf while travelling for business or pleasure with nearly 65% of all golf travellers having an household income of more than US$50,000 (Western Cape, 2004).

Golf tourism is defined by Readman (2003, p. 166) as: ''travel for non-commercial reasons to participate in golf activities away from the traveller's local environment''. Golf 20/20 (2002) describes golf tourism as a primary motivating factor for travel, or, as an enjoyable activity whist travelling. Alternatively, golf tourism is defined by Tourism Victoria (2003) as an activity, or overnight trip, where the golfer is travelling more than an hour outside their place of residence and/or regular golf course or club and displays at least one of the following characteristics: golf is a primary motivator for travel; golf is a major determining factor in choosing the destinations and/or golf will become the primary leisure activity on the trip.

Although golf tourism is relatively easy to conceptualise, it is however, less clear as to what constitutes a golf tourist. Fig. 1 provides a suggested typology of what could constitutes golf tourists. Golf 20/20 (2004), one of the most authoritative sources in this regard, suggests (supplemented by KPMG (2002)), that golf tourists, can be classified into three generic categories: the avid golfer—plays 25 or more rounds of golf per annum and is a person who often arranges to travel with golf as the primary focus of the trip and commonly travels during non-peak season. This golfer prefers renowned, high-quality golf courses, the availability of night life and restaurants, as well, as mid to high-end accommoda- tion; *business traveller golfers* (or core golfers, according to Golf 20/20 (2004))—enjoy playing 8–24 rounds of golf per annum while travelling for business purposes where golf courses attached to or affiliated with conference centres and hotels are considered attractive; and the *family* (or occasional, according to Golf 20/20 (2004)) golfer—is person who plays one to seven rounds of golf per annum and is more likely to consider golfing as an activity whilst travelling but is not likely to make the destination selection solely based on golf considerations. This golfer generally prefers good quality golf courses that are reasonably priced and are playable by golfers at all skill levels. The family golfer is attracted to a golfing destination that offers family activities, outdoor attractions, with mid to high-end accommodation.

Golf tourists are considered by Weed and Bull (2004) to be characterised by their behaviours and motivations. Two types of participant golf tourists are identified: those who are experienced participants and those who are using the

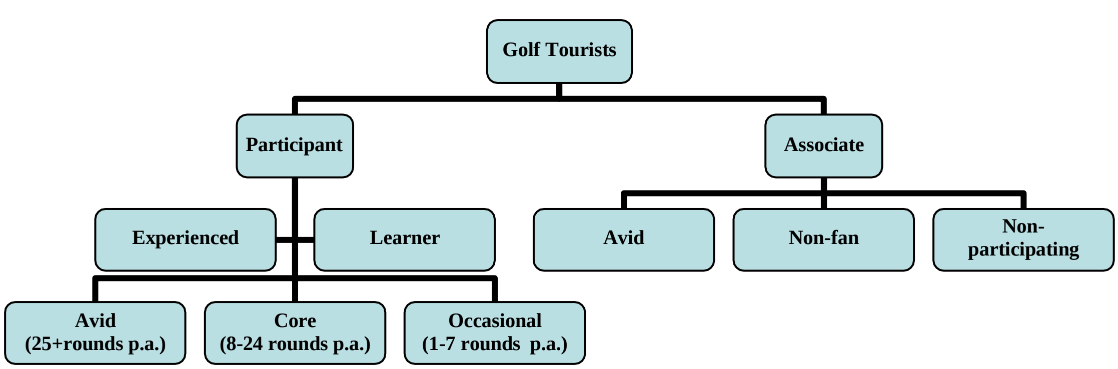

Fig. 1. Typology of golf tourists (adapted from Weed & Bull, 2004; Golf 20/20, 2005).

trip to learn play more golf. For both types of participant golf tourist, an important reason for the trip is the need for the golf resources to be in place in order to enable participation, for example, physical resources such as golf courses and associated services such as golf instruction. The concept of novelty plays a significant part in the consideration of the golf tourists. For some golf tourists on their first golf trip, the novelty of a different type of vacation is likely to have been a significant element in the trip decision-making process. For others, more experienced participants, the novelty of taking part in a new destination of ''collecting places'' may be an important motivating factor. Generally, the profile of golf tourists is less likely to involve family groups although, given the often-luxurious nature of the attendant accommodation and facilities, spend per trip is usually high.

The associate experience sports tourists, according to Weed and Bull (2004, p. 66), is a difficult category to define. A large element of the associate golf tourists sub-sector can be generally described as being interested in the post or ''*apre`s*''—activity experience at a golf course. In other words, some golf tourists find the ''nineteenth hole'' experience (the colloquial term for the bar at a clubhouse) more important than the sport itself, and fall within the associated experience sports tourist sub-category. Golf 20/20 (2005) indicates that the associated experience golf tourists can be further classified into avid, non-fan and non-participating fans, of which

- an *avid fan* is a person who expresses a high degree of interest in golf, whereas a *golf fan* is a person who expresses at least some degree of interest in golf, whether he or she is a participant or not;
- a *non-fan* is a person who indicates they do not have any interest in golf; and
- a *non-participating fan* is a person who expresses at least some degree of interest in golf but is not a participant. Non-participating fans represent an important, but latent, golf tourism market. This sub-category includes golf television viewers who in turn can be further classified into occasional, core or avid golf viewers. There are various sub-categories of non-participating golf viewer fans, namely: an *avid tournament viewer* is someone who watches more than 15 live tournaments on television in a given year; a *core tournament viewer* is someone who watches 6–15 live tournaments on television in a given year; a *golf tournament viewer* is someone who watches at least one live golf tournament on television in a given year; and an *occasional tournament viewer* is someone who watches five, or fewer, live tournaments on television in a given year.

1.4. Golf tourism in South Africa

A major advantage of the South African golf tourism industry is that golf is considered an all-year-round sport and is, therefore, less likely to suffer from the effects of seasonal demand as experienced by some European golf destinations. The research-to-date suggests that South Africa does not rank highly as a golf destination amongst its traditional tourism source markets of UK, Germany, and France and, the country does not currently attract a large number of dedicated golf tourists (Western Cape, 2004). There is, however, no national data currently available to quantify the number of foreign or domestic golf tourists. Surveys conducted amongst tourists have not included questions such as: ''Was your main motivation for visiting South Africa to play golf? Have you played golf during your trip? How many rounds of golf have you played?'' (Western Cape, 2004, p. 24).

South Africa, according to research conducted by IATGO, is considered the eighth most popular golfing destination for German tourists according to Greeff (2001) and Sheard and Veldtman (2003). Research conducted by Blij (2002) suggests that whilst the percentage (of the number) of golf rounds played by Member and Affiliates has remained the same, the number of golf rounds played by golf tourists (club visitors) had increased by 40% in the Western Cape during 2002. Blij (2002) emphasises that clubs are now increasingly relying on the income generated by golf tourists to augment the income from the number of golf rounds played per annum within clubs.

Although the first meeting to introduce golf in South Africa took place at the Cape Town Castle in 1885, and the Royal Cape Golf Club was established in 1910 (Prior, 2003); golf tourism research in South Africa is still in its relative infancy. Limited research has seemingly been conducted to determine the expectations of the South African golf tourists. Most information available concerning golf tourists has been derived from international studies conducted outside South Africa (for example, the Australian Industry Science Resources Study, 2000). Although the existing international research has provided considerable insight into golf tourism, much of it, though, has seemingly been from the golf industry (supply side) perspective rather than from the tourists (demand side). South African golf course administrators, tournament organisers and golf tourism operators seemingly have had difficulties in distinguishing the level of interest and commitment of the golf tourist to a destination. The golf tourist was thus an important, but neglected, niche of the sports tourism market of South Africa. Some further issues that can be highlighted are:

- An investment in golf tourism is often associated with taking a ''leap of faith'' rather than the result of carefully formulated strategies based on thorough research. Research data is often not scientifically recorded; and market research efforts are frequently fragmented and duplicated. Yet, large investments are being made to attract golf tourists to local golf courses and events. For instance, the scale and number of golf estate developments along the Garden Route Region (and elsewhere in South Africa) has caused much concern amongst various stakeholders that it resulted in the commission, by the Western Cape Provincial Government, of a Rapid Review Of Golf Course And Polo Field Developments Report (Western Cape[1], 2005) and the formulation of Policy Guidelines For Golf Course And Polo Field Development (Western Cape[2], 2005) to inform decision-making among the key public and private sector stakeholders concerning the sustainable development and management of this sub-sector.

- National (and to a lesser degree local) tourism marketing authorities have seemingly not identified golf tourism as a marketing priority. The situation is compounded by a lack of integration between the various role-players in the local and national golf industry.
- South African golf course administrators are seemingly more interested in member numbers at the golf courses whereas the golf tourists are looking for a total experience. There is seemingly a general lack of understanding about tourism, marketing, and service requirements of the golf tourists.
- Unless golf tourism is integrated as part of the golf and tourism industries' development strategies, it will not be able to play its meaningful role in assisting to extract the maximum economic value of the South African sports industry and build ''Brand South Africa''.

Against this background, the aims of the research were, firstly, to conduct a demand-side study to determine the demographic profile of golf tourists attending an international golf event in South Africa, and, to shed some light on their key trip-related and general golf tourism behaviour patterns. Secondly, to make recommendations to tourism policy planners and policy makers, and, lastly, to contribute toward the body of knowledge on golf and sports tourism in South Africa.

2. Methodology

2.1. Study design

For the golf event, a quantitative approach was employed to provide an insight into the profile of golf tourists attending an international golf event in South Africa, and to shed some light on their key buying and general golf tourism behaviour patterns. This design was chosen because it provides a highly accurate picture of the phenomenon under study. The research was intended to be a demand-side pilot survey and was seen to be the initial phase of a longitudinal study, research- funding permitting. It is crucial to emphasise that this study is the first of its kind in South Africa and hence it is exploratory in nature.

2.2. Sample

The sample framework were the golf tourists (or the so-called golf event attendees) who attended the Fifth Presidents Cup that was held at the Links Golf Course, Fancourt, near the town of George (refer to Fig. 2), on the Garden Route, during 18–23 November 2003. The Garden Route runs along a portion of South Africa's Western Cape and Eastern Cape Province coast (along a 227 km portion of the N2 National Road) from the town of George to the city of Port Elizabeth, and is so-called because of its perpetual lushness (South African Lodges, 2007). Cape Town and Port Elizabeth are considered to be the gateway cities to the Garden Route.

The President's Cup is an Event held every alternate year and is a golf competition between the USA and the Rest of the World (excluding Europe). The said Event was selected as a research site as it was assumed by the researchers would be supported by tourists who were considered to be consumers of golf tourism offerings (refer to Section 1.3), i.e., golf is a primary motivator for travel; golf is a major determining factor in choosing the destinations and/or; golf is the primary leisure activity on the trip.

The sampling methodology for the research was adapted from the study by Bruwer, Haydam, and Lin (1996). The sampling methodology used in this regard was a *disproportionate systematic time-based stratified sample by origin* (international and domestic tourists). Disproportionate stratified sample by origin meant that equal numbers of international and domestic tourists to the Event were earmarked for survey. This was very important as it allowed for a detailed analysis of the profile and habits of both the domestic and international tourist alike thus ensuring relatively large sample sizes for each group, given the limited budget. In total, 400 interviews divided equally by domestic and international tourists to the tournament were earmarked for the study. Given the number of planned interviews, tourist groups were intercepted at given time intervals, over 4 days at key locations at the venue—known as systematic time-based interviewing.

Ultimately, 324 golf tourists were interviewed (using a standardised questionnaire) of which 134 were international tourists and 190 were domestic tourists. The shortfall of the targeted sample of 200 interviews per category was ascribed, to the omission of survey questionnaires, which were judged by the researchers as being incomplete, and

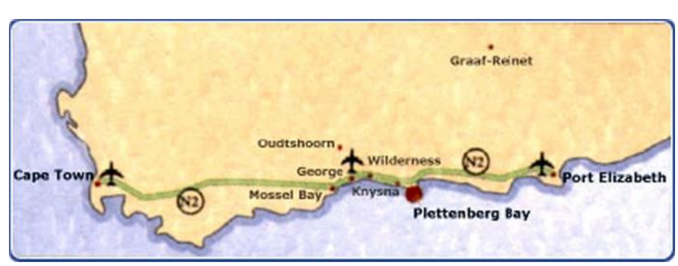

Fig. 2. Garden Route Map (Plettenberg, The, 2005).

Table 1
Number of interviews conducted per day: origin of tourist

Category	International tourist	Domestic tourist
20 November 2003 (Thursday)	28	46
21 November 2003 (Friday)	39	59
22 November 2003 (Saturday)	36	49
23 November 2003 (Sunday)	31	36
Base	134	190

unusable. These questionnaires included tourists surveyed who were actually part of staging the Event, as well as respondents who provided conflicting or non-consistent information. In the case of international tourists, a high non-response was encountered as many international tourists felt inconvenienced by fieldworkers requesting interviews as well the fact that no telephonic call-backs could be undertaken to verify conflicting data. Table 1, here under, provides a summary of the number of interviews conducted per day.

2.3. Research instrument

The research instrument used was a structured questionnaire that provided factual information on the subject under investigation, and gave respondents an opportunity to give their own accounts of behaviour, attitudes, and intentions. Furthermore, the measuring instrument also guaranteed anonymity of response, reduced and eliminated differences in the way in which questions are asked, and how they were presented. Two questionnaires were used in the study. Although both questionnaires were the same, the international questionnaire had additional questions relating to the incidence and duration of international tourists visiting South Africa, and the question on origin had to be adapted. Also, having two separate (yet the same questionnaires), made the sampling process and execution easier.

The questionnaires consisted of four sections and included categories of questions on the following: the origin of the tourist, golf visiting habits, trip-related criteria, internet and information-related matters; expenditure-related matters, and demographic criteria.

2.4. Procedure

The fieldwork was conducted during 20–23 November 2003. The procedure adopted was that all interviews were conducted on a face-to-face basis. Tourists were advised on: (a) their status as volunteers, (b) their right to refuse to answer any question, and (c) confidentiality. A pilot study with eight golf tourists during the first practice day of the tournament was also undertaken. Thereafter, the wording of the original questionnaire was reviewed and modified accordingly. Ambiguity of meaning was eliminated; clarity, comprehensibility and simplicity of items were ensured. The questionnaire was adjusted in order to accommodate cultural sensitivity of the participants. Using the systematic time-based sampling technique, the key problem of the fieldwork was to find suitable intercept portals where respondents could be interviewed. Ideally, the researchers should have interviewed the respondents at the Event exit points who would be exiting the tournament. This interception method was considered to have several key advantages, namely: respondents would not be disturbed by fieldworkers whilst watching golf; respondents would have had a complete golf experience with which they could provide comment, and importantly, by interviewing at the exit point, the traffic would be one-directional consequently making it easier to apply the systematic time-based sampling technique. However, this was deemed not to be practical as the vast majority of spectators would have left the grounds in the last half hour of the day. Only a large fieldwork contingency would have made this possible, assuming that spectators would be willing to freely participate after a long day of golf. Hence it was decided that spectators would be intercepted inside the course while watching golf. This was not the ideal situation, but provided a workable solution. Two key intercept points, used throughout the tournament, were the marquee and the exhibition tents. These intercept points had the advantage that there was a continuous flow of spectators during the day, making it ideal to apply the time-based sampling method. Furthermore, both intercept points were at opposite sides of the grounds and presented different offerings to the spectator. The marquee tent offered main luncheons and refreshments, and the exhibition tent offered refreshments, souvenirs, and memorabilia. A further four intercept points (two at the front nine holes and the other at the back nine holes) were earmarked for fieldwork and used on alternate days. In selecting these intercept points; they had to be conducive for interviewing, for example, in an area where the course naturally opens up, thus allowing for spectators to be easily intercepted. Being a Links course, once the field has passed, the group of interviewers would move to the back nine holes for instance and apply the same sampling procedure.

As there were four separate intercept portals at any given day of the tournament where spectators could be intercepted, surveyors had to ensure that the respondents were not surveyed more than once. Two control measures were put in place. Firstly, surveyors asked respondents whether they had been surveyed at any time during the tournament. Secondly, the names of respondents were recorded and sorted by their first names and surname at the end of each day, in order to verify whether they had already been surveyed. A husband and wife travel group who both completed a questionnaire was regarded as a duplication.

Eight surveyors were used at the event for data collection purposes. Four of these surveyors were 4th year marketing management students at the Cape Peninsula University of Technology in Cape Town (formally known as the Cape

Technikon) and the remainders were recruited freelance surveyors. Interviewers were all of European decent, two were male and six were female, and aged between 22 and 36 years. Also, during the event a dedicated supervisor with some 12 years experience in research was in control of all surveyors, cared for their needs and resolved problems as they occurred. In order to eliminate any interviewer bias, surveyors were fully briefed and the systematic time-based sampling procedure was followed stringently. The allocation of fieldwork was as follows: Four groups of two interviewers were each allocated 4-h time slots per day (over 4 days) at the Event. Each group was given 25 interviews (divided into international and domestic tourists) which assured the equal number of tourists surveyed namely 100 per day. Interviews lasted between 8 and 12 min and having two interviewers per shift allowed interviewers to intercept tourist groups every 10 min (systematic time-based). As expected the domestic questionnaires were all completed well before the international quota. Fieldworkers were then asked to fill the quota by targeting only international tourists and adhering to the pre-defined time-intervals until the end of their time session. This process ensured randomisation of the sampling process as it eliminated the interviewer's selection bias.

In the case of the fieldwork, the researchers had to take into account the rights of the respondents watching golf, for which they paid a high premium. These rights are vested in four key areas, namely, (i) the right to privacy, which includes personal intrusion and the divulging of personal information; (ii) the right to be informed, i.e., the length of the interview, the sponsor and the end-user of information; (iii) the right to choose to participate or not; and lastly (iv) the right to safety from any physical and psychological harm (McDaniel & Gates, 1999, p. 690). In the execution of the fieldwork, the researchers were guided by the code of ethics as laid down by the Southern African Marketing Research Association (SAMRA), namely: ''Marketing research must always conform to the national and international legislation which applies in those countries in a given research project'' (SAMRA, 2004).

The right to participate in the study was voluntary which meant that respondents could terminate interviews at any time. Fieldworkers were briefed that no interviews would be forced upon respondents. In addition, interviews were conducted in such a way that they adhered to the right of the respondent's privacy. Zikmund (1997) mentions that respondents would feel more relaxed about privacy issues if they know who was conducting the interview. It is further recommended that legitimate researchers should identify themselves properly either via business cards, name tags, etc. In the case of the survey, interviewers wore official tournament name tags and had an official letter from the tournament organisers clarifying their position concerning the research being conducted during the golf tournament. This letter, however, was only produced on demand (by the respondent), or when interviewers felt that they needed to gain the trust of the respondent at the initial contact. To accommodate the above-mentioned, interviewers were instructed to conduct their interviews between golf shots, e.g., when golfers waited for the field to move, waiting at tee shots, or where golfers walked up to their next shot. All effort was made to ensure that interviewers would not interfere with the spectator's intention to watch golf. This worked quite well as there was quite a lot of ''dead'' time between player groups. Lastly, respondents were all informed about the sponsor, the purpose of the study and at the same time the anonymity of their responses were guaranteed by fieldworkers. The survey did not cover sponsored and invited golf tourists and dignitaries. This group of people had preferred access points that were out of bounds to the fieldworkers.

3. Findings

3.1. Demographic characteristics

The demographic characteristics of the respondents included age, gender, marital status, educational status, and place of origin. A total of 324 golf tourists were interviewed of which 134 were international visitors and 190 were domestic tourists. The findings of the research suggest that the demographic profile of the golf tourists was that almost 73% of tourists were 36–65 years old (of which almost 40% were 36–50 years old), and 79% were male.

Post mortem information of the Event, from organisers of the Event, revealed that an estimated 9.3% were international visitors and the remainder (90.7%) were local residents and domestic tourists attending the Event. Hence, some of the data was weighted to these proportions to provide an overall view of the visitor to the Event. In terms of the place of origin, 49.3% of the international golf tourists were from Europe (the United Kingdom having the highest representation at 28.4%); 22.4% were from North America (of which 20.1% were from the USA); and 15.7% of international golf tourists were from Africa. This is indicative of the drawing power of the international Event. The other major sources of international golf tourists were South-East Asia, which contributed 5.2% of golf tourists, Australia (including New Zealand and the Far East which each contributed 3.7% of golf tourists, each, to the Event. In terms of place of origin of domestic golf tourists, 34.2% were from Gauteng Province, who had to travel at least 1000 km to get to the Event. Nearly 20% (18.3%) of all domestic visitors were from the town of George and immediate vicinity.

Being a golf tournament between USA and the rest of the world (excluding Europe), three possible reasons may be cited as to why the Event attracted more visitors from Europe than from the USA. Firstly, the results showed that 68.2% of all European visitors stated that they would have come to the Garden Route area in any case had the Golf tournament not been held, compared to only 48.1% of visitors from the USA. In other words, European visitors

Table 2
Domestic versus international tourists: demographics

Category	Sub-category	Domestic tourist (%)	International tourist (%)
Age	36–50 years	40.5	32.8
Occupation	Non-employed: housewife/ student/pensioner	15.8	32.1
	Manage and create employment, i.e. professional, self-employed and managerial/ executive	74.2	60.5
Home language	English	56.3	67.2
Family life-cycle	Empty nest	23.7	32.1
	Senior citizens	8.9	15.7

were on holiday in South Africa and the President's Cup offered them an extension of their holiday experience. Secondly, the distance from the destination had to be taken into account. Conservatively, American tourists would have spent at least 50% more time travelling to the Cup competition, making the Event for them less attractive. Lastly, although it was not probed, one could reason that European golf enthusiasts' primary objective was to watch international golfers compete and outcome of the tournament was only a secondary issue to them.

The family life-cycle stages framework was adopted from the work by Brassington and Pettitt (2003, p. 125) in that four main groups are identified: Empty Nest (24.5%), Full Nest II (20.5%), Newlywed II (14.4%), and Bachelors. Empty Nest was defined as married persons between the age of 36 and 65 years with no children at home anymore. Full Nest II were married persons with children under 16 years, Newlywed II were married persons aged between 36 and 65 years with no children, whereas Bachelors were single, younger than 65 years and with no children.

Key demographical differences between the domestic and international tourist must be noted in this regard. Table 2 provides an overview thereof: in comparing the domestic spectator to the President's Cup, the international visitor was seemingly older than and in their mature cycle of life.

3.2. *Buying and travel trip behaviour*

The travel trip behavioural characteristics (or tripographics as per Hu & Morrison, 2002) of the golf tourists are discussed in this section. These factors include aspects such as the accommodation preference of golf tourists, mode of transport used, and the size of the travelling party. In addition, the following buying characteristics were also considered: sources of information, general golf event habits, areas for improvement, and key aspects of the golf tourism destination. These are discussed hereunder to shed some light on the key buying and general golf tourism behaviour patterns of the respondents.

3.2.1. *Golf tourism expenditure patterns*

Respondents were asked to provide an estimate of the total spending per travelling party to attend this Event. The study found that the true mean net spent per person per day was ZAR946. This compared favourably with the average spend of international tourists in the Greater Cape Town area of ZAR 953 in 2003 (Datavision Marketing, 2004). On analysis, 20.9% of expenditure was spent on accommodation, 22.0% on restaurants (including other providers of food), and 27.4% of all expenditure was spent on entertainment. The remainder was made up by shopping stores, i.e. clothing, souvenirs, etc. (12.6%), groceries (including beverages) (8.4%), local ground transport, e.g. taxi, car hire (5.8%), and unspecified items (2.5%). Only 0.4% of all tourist expenditure was spent on domestic organised tours.

3.2.2. *The size of the travelling party*

The average size (mean) of the travelling party for those classified as domestic tourists was 2.1 persons with 92.1% of domestic tourists travelling without children. Interestingly enough, the research suggests that only 5.3% of domestic tourists were part of a formal organised tour group to the Event with the results also indicating that 40% of domestic tourists travelled as groups of seven to ten persons. The research shows that for those respondents categorized as international tourists, the average size (mean) was 1.8 persons with 96.3% travelling without children. The research suggests that the largest size of an international travel party was two (50%) with the results also indicating that 32.8% of international tourists travelled in groups of three or more persons and were considered to be informal tour groups to the Event.

3.2.3. *Accommodation preferences in the Garden Route*

The study probed the accommodation preference of the respondents during their visit to the Event (those who were from outside the Garden Route area). The research found that 17.3%, visited friends and family (VFR), and, 15.4% stayed at Bed and Breakfast establishments. The study, further showed, that very few (1.1%) of respondents who visited the Event did not stay over and the study also suggests that the accommodation preferences, on average, for golf tourists to the Event who stayed-over to be 6.5 days in the Garden Route area.

3.2.4. *Mode of transport*

The findings indicate that almost half (48.1%) of respondents used their own vehicle for transportation to the golf event. A further 27.3% of golf tourists used air transport and 21.1% used rental vehicles as a form of preferred transport to the Event.

Table 3
Domestic versus international tourists: trip-related issues

Category	Sub-category	Domestic tourist	International tourist
Travelling party	Mean size	2.1 persons	1.8 persons
	Part of organised tour group	5.3%	10.8%
Garden Route Area	First time visit in the past 5 years	16.4%	44.0%
	Mean number of days in the area	6.0 days	7.4 days
	Reason for visiting area is only for golf	81.6%	58.2%
	Reason for visiting area is for holiday purposes	27.6%	43.4%
	Would *most definitely* visit the area in the next 5 years again	75.5%	52.2%
Accommodation[a]	Resident in the area	19.5%	–
	Staying with family/friends	17.9%	11.9%
	Bed and breakfast	14.7%	22.4%
	Holiday house/owned property	14.2%	6.0%
	Apartment	7.4%	8.2%
	Rented house/house exchange	6.3%	7.5%
	Guest house	6.3%	12.7%
	Hotel	5.3%	14.9%
Transport used[a]	Private vehicle	52.3%	20.6%
	Aeroplane	25.9%	36.8%
	Rented vehicle	18.8%	37.8%
	Tour bus	1.5%	1.9%
Days attended	Four days	61.6%	50.7%
Expenditure	Entertainment (incl. tourist attractions and entrance fees)	28.9%	16.8%
	Restaurants (meals and fast food)	22.1%	21.4%
	Accommodation	20.1%	25.8%
	Shopping stores (clothing, souvenirs, other non-business)	12.4%	14.4%
	Groceries (including beverages)	8.4%	8.6%
	Local ground transport (taxi, car hire, and public transport)	5.3%	9.6%
	Domestic organised tours	0.2%	1.4%
	Mean expenditure per person per day	905 ZAR	1369 ZAR
Connectivity	Surfed the Web to obtain information about the President's Cup	34.7%	54.3%
Other information search methods[a]	Television	36.3%	26.9%
	General knowledge—am a golfer	31.6%	26.1%
	Newspapers	22.6%	11.2%
	Magazines—golf	21.1%	21.6%
	Recommendation from friends	10.5%	13.4%
	Magazines	10.0%	8.2%
	Business connections	7.4%	9.0%
	Radio	6.3%	3.7%
	Referral: previous experience	3.2%	7.5%
	Referral: relatives	2.6%	6.0%

[a]Multiple answers.

3.2.5. Number of days that the Event was attended

The research showed that almost 61% of the respon- dents at the event attended all 4 days, 16.3% attended 1 day, 11.4% attended 2 days, and 11.8% attended 3 days.

In the light of having discussed the various character- istics of the golf attendees to the President's Cup, the key differences between the international and domestic golf tourists, depicted in Table 3, should be noted as these have key marketing implications for golf tourism destinations.

3.2.6. Garden Route habits

The research determined that nearly 52% of respondents indicated that they would have come to the Garden Route that year even if the golf event had not been staged, and 46% indicated that they would have not visited the destination had the destination not staged the Event. Furthermore, almost 79% indicated that they visited the Garden Route mainly for the golfing experience. The main reasons provided by the domestic tourists for visiting the destination other than for golf tourism were: business trips (34.5%); holiday/leisure (27.6%); VFR (20.7%), and own- ing holiday homes in the destination (20.7%). Nearly half (45.5%) of international tourists would not have visited South Africa had the golf event not been staged. In total, over 58% of respondents visited the Garden Route specifically for golf. Those international tourists (40.3%)

who indicated that their holiday to South Africa and the Garden route, was not only for reasons of the golf event, indicated the following additional reasons for visiting the destination: holiday/leisure (43.3%); ecotourism (15.1%); VFR (15.1%), owning holiday homes in the destination (13.2%) amongst other.

3.2.7. *Golfing habits*

Referring to the typology of golf tourists (as discussed on pp. 6–7), the study revealed that 83.3% of all golf tourists to the Event were Participant golf tourists and the remainder, i.e., 16.7% the so-called Associate golf tourists. The research results provided no indication of golf tourists who were categorised as participant and associate golf tourists. Furthermore, occasional golfers made up 25.6% of all tourists to the Event which were defined as people who played less than seven rounds of golf and included also those golfers who were not formal members of a golf club. Avid golf tourists and core golf tourists made up to 13.8% and 19.1% of all tourists to the Event, respectively. An analysis of the responses from the international tourists indicates that nearly 95% of respondents were golf players with over 91% belonging to a golf club. The study did not probe if there were respondents who could be categorised as both participant and non-participant golf tourists.

3.2.8. *Rating the destination and Event*

Keeping in mind the nature of the Event whereby shortages in accommodation supply are created over a relatively short period, the charging of international entry prices to the Event; the Garden Route was considered as good value for money (however, with only 17.6% indicating that it was excellent value for money). In particular, a fair portion (33.5%) of the domestic tourists rated the destination as expensive. Nonetheless, 89% indicated that they would most definitely/definitely visit the Garden Route and/or Cape Town over the next 3 years. Only 2.4% indicated that they would definitely not/most definitely not visit the destination in the next 3 years.

3.2.9. *Sources of information regarding the golf event*

The study examined the issue of the information sources used by tourists with regard to making purchasing and non-purchasing decisions at the golf event in the destina- tion. Only three of the top 10 information sources on the golf event were published material: newspapers (21.6%), golf magazines (21.1%), and general magazines (9.8%). Television was the top source (35.4%) of information concerning the Event. General golf knowledge (31.1%); recommendation from friends (10.8%); business connections (7.5%); Internet (7.4%); Radio (6.1%) and previous experiences (3.6%) made up the other six top sources of information. The Internet only got 7.4% as a source of information regarding the golf event in the region and requires further research to determine the underlying reasons in this regard. Considering, however, that most respondents were managing and creating employment, it is not surprising that the vast majority (89.2%) had Internet access. Only about 35% of those domestic tourists with Internet access actually surfed the web to obtain information about the Event. The research indicates that just over 54% of international tourists' used the Internet to obtain information about the Event and the Garden Route, before travelling to South Africa. Hence, international tourists visited the Internet more than their domestic counterparts did (30.2% versus 11.9%).

3.2.10. *Aspects found missing at the Event*

International and domestic tourists found that the course design (too far to walk) was the key issue (27.6%) that detracted from the Event. The other aspects, which international tourists found needed attention, were: poor support services (i.e. access to cash vending machines, refreshments, souvenirs) (15.5%); organisational issues related to the purchasing of tickets and ticket prices (11.3%); and, poor viewing opportunities (not a spectator friendly facility) (12.4%). Domestic tourists indicated that the main aspects that were found missing were: there was a poor variety of refreshments (17.5%); course infrastructure was poor (15.3%), i.e., seating facilities; support services were poor (i.e. access to cash vending machines, refreshments, souvenirs) (15.3%); poor viewing opportunities (not a spectator friendly facility) (13.9%); and it was expensive to attend the Event due to high prices (10.9%). Overall, however, domestic and international tourists rated the Event reasonably positively, 19.7% and 19.6%, respectively.

3.2.11. *The number of days attended at the Event versus key demographic variables*

The following information may shed some light on the possible links between the number of days attended at the Event (1, 2, 3, or 4), and the following demographic variables: age and professional occupation.

The research suggest that, in terms of the number of days, that the 4-day event was attended by the respondents, the 36–50-year-old age segment was the most prominent with 40.7% having stayed for all 4 days, 43.1% (1 day only) and 43.1% (2 days only). The 51–65-year-old segment stayed for at least 3 of the 4 days of the Event. Furthermore, the research suggests that golf tourists who have a professional occupation stayed for all 4 days of the Event (38.8%), the self-employed golf tourist could only attend 1 day of the Event (25.2%) and non-employed golf tourists attended only 2 days of the Event (24%).

3.3. *Discussion of findings*

It should be noted that the sample size was determined in part by budget constraints, which inherently impeded the study. The study provides critical information about South African golf tourism, in particular; and South African sports tourism development. It is a groundbreaking study that could be explored further through longitudinal studies with larger samples. The collection and interpretation of sports (and golf) tourism statistics in South Africa can be described as being in its formative stage; consequently, the total market for golf tourism in South Africa could not be determined. At the time of writing, the establishment of the only known Golf Tourism Forum (for the Western Cape Province) was still in its formative stage.

The results suggest that the demographic profile of South African golf tourist is as follows: they are mostly between 36 and 50 years old (with an additional notable group between 51 and 65 years old), most likely male, married, with the children having left home (Empty Nesters or retirees), and with a professional qualification and possibly self-employed. The results from this study, if compared with results of the studies undertaken for Australia's Tourism Victoria (2003), and the Australian study undertaken by Roy Morgan Research (2002) suggest some similarities. In the Australian case, however, the research suggests that the identified target market are golf tourists who are slightly younger with a higher incidence toward the 35–49-year age group, more men than women were golf tourists, they were mostly professionals with university qualifications, they are married but with no children at home, and, were success- and career-driven (status seekers, and wealth managers and creators). The Australian research also takes cognisance of the importance of the 50 year plus golf tourists who are also generally ''empty nesters''.

The South African golf tourism target market, suggested by the results of this research, can alternatively be termed as the ''Baby Boomers'' generation (Kotler, Bowen, & Makens, 1999, p. 114). The ''Boomers'' were born between 1946 and 1964, although in the South African case, the Boomer years have been extended to 1970 due to the policy of apartheid that tried to socially engineer society (Codrington, 1999). In the context of the South African golf tourism market, the Boomers (especially the younger segment, 36–50 years old) have the greatest impact. Boomer golf tourists are seen to expect customised service, and according to Kotler et al. (1999, p. 114), are approaching life with a new stability and sensibility in the way they eat, spend, think, and live. The older-Boomer Generation (50–65 years old), according to Kotler et al. (1999, p. 660), are ''opting for all-inclusive resorts and package tours that promise comfort, consistency and cost-effectiveness''. It is also noted that there is a clustering of respondents who are up to 35 years of age, the so-called Generation X, however, in the context of the South Africa golf tourism industry, it is suggested that they represent a potentially new target market for the near future and required continual research. The segmentation of the golf tourism market thus has direct implication for the type of golf tourism offering that has to be developed, and has direct implications for the type of niche opportunities that can be targeted in destination marketing.

The study also probed the buying and travel trip behavioural characteristics of the South African golf tourists. The results suggest that South African golf tourists mostly belong to a golf club; however, 11% do not hold golf club memberships. Consequently, it is suggested that these golf tourists can be classified as associate golf tourists.

In the case of the Event not having been staged, 46% of respondents indicated that they would not have visited the golf tourism destination, and, over three-quarters indicated that they visited the Garden Route area mainly for the golfing experience. The results show that almost half of golf tourists use their own vehicle for transportation within the golf tourism destination. The research also shows that just over 5% of domestic tourists prefer to purchase formally organised packages. In the case of both domestic and international tourists, the majority of golf tourists prefer to travel in parties of two. The findings in this regard have marketing and development implications for a destination's management strategy. The golf tourists clearly know what they want: they seek to experience quality golf tourism offerings. To this end, golf tourists expect that golf course architects need to minimise long walking distances within courses; provide adequate support services at such Events, and importantly, organisers at such Events need to pay particular attention to ensuring acceptable match viewing opportunities to associate golf tourists. The research also found that though the overall Event was rated as fair to good value for money, almost a third of domestic golf tourists indicated that they found the golf tourism destination to be expensive. Clearly, this issue has to be addressed head-on in the light of the South African Government's desire to expand domestic tourism as indicated in the 2004–2007 Domestic Tourism Growth Strategy (DEAT[1], 2004).

Despite the limitations of this study, the results are useful for understanding the South African golf tourist and are useful for indicative purposes. Golf tourists seem to make a number of key purchase and non-purchase decisions to travel and to return to a golf tourism destination. The relationship between the travel trip behavioural characteristics and the quality of the golf tourism supply (or plant) at a destination has been identified as very important.

3.4. Recommendations and conclusion

Sports and tourism are among the world's most sought-after leisure experiences (Ritchie & Adair, 2002). It is crucial that the tourism destination management organisations and tourism marketing authorities accurately segment and niche South African golf tourism destinations; especially less well-known destinations featuring a diversity of experiences available to the golf tourism target market and, position such less well-known golf regions as holiday destinations which require more than 1 day to be experienced. Further, there is need to develop and promote sports tourism products which package golf visits with other top attractions and activities around the country.

There is need to encourage the packaging of sports visitations with a diversity of tourist experiences available within the destinations.

In an increasingly competitive global sports market, destination management organisations and tourism marketing authorities need to clearly define the needs, wants and characteristics of the golf tourism sub-sector with accurate, relevant and up-date information concerning their target markets. The South African tourism authorities have a number of major tasks to undertake to promote the development of the golf tourism sub-sector:

- Develop accurate up-to-date market information on the golf tourism sub-sector and ensure its distribution is targeted to the relevant travel trade and consumer markets. Ensure that quality information is available on golf tourism in tourist guides and bureaux on local and regional levels.
- Encourage complementary tourism offerings to co-operate, and improve product development between golf, sports tourism and other cultural experiences at a provincial and/or inter-provincial level.
- Improve awareness amongst golf businesses about the tourism industry, and its relevance to their businesses.
- Improve the tourism knowledge and customer service performance of the golf tourism industry by establishing educational programmes and accreditation.
- Monitor and quality assure the quality of golf tourism services being delivered by golf tourism providers.
- Regional planning in tourism destinations, with particular focus on the smaller sport (and golf) tourism destinations, can foster the development of regional identity, assist to assist in growing businesses in both the golf and sports tourism industries, and facilitate networking between these and individual providers of services. Cooperation amongst key players in the golf tourism supply side, especially in the less popular golf tourism destinations can develop and improve golf tourism offerings within those destinations.
- There is a lack of appropriate market research into sport (and golf) tourism in South Africa, consequently, there is a need to conduct longitudinal tracking studies of such tourists in South Africa.

Policies and strategies should be formulated toward the development of greater linkages between the sports and tourism industries, and to improve the ability to promote the regions to attract investment and encourage employment. Golf tourism is a specialist interest tourism sector that has the potential to contribute and serve as a strong base for the development of a healthy sports tourism economy in South Africa; a strong relationship thus exists between golf tourism and the decision to purchase golf tourism offerings. It is crucial that the tourism authorities clearly understand the needs and expectations of the golf tourist if they are to implement successful niche marketing strategies.

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