VisitScotland / Scottish Enterprise

Scotland Golf Visitor Survey 2016
Final Report

Contents

Executive Summary 1
Introduction 5
Method 7
Main findings 12
1. Profile of Golf Visitors 12
1.1 Country of Origin 12
1.2 Previous Visits 13
1.3 Demographic Profile 13
1.4 Golf Trip Behaviour 15
1.5 Profile of Golf Visitors – Summary of Key Findings 17
2. Visitor Journey 19
2.1 Planning 19
2.2 Booking 24
2.3 Trip Characteristics 31
2.4 Visitor Journey – Summary of Key Findings 37
3. Visitor Experience 39
3.1 Evaluation of Golf Experience 39
3.2 Scotland as a Golfing Destination 41
3.3 Improvement Suggestions 48
3.4 Visitor Experience – Summary of Key Findings 48
4. Spend and Economic Impact 49
4.1 Expenditure – Day-trip Visitors 49
4.2 Expenditure – Overnight Visitors 51
Summary and Conclusions 55
Appendices 57
Appendix A - Regional Data Tables 58
Appendix B - Activities Undertaken on Trip 68
Appendix C - Questionnaires 70
Appendix D - Technical Appendix 105
Appendix E – SQW Report 107

Contact information

Diane McGregor
Joint Managing Director
0131 2972569
Diane.mcgregor@progressivepartnership.co.uk

Leah Ringland
Associate Director
013 2972562
Leah.ringland@progressivepartenrship.co.uk

Executive Summary

Introduction and method

Scotland is widely recognised as one of the premier golf tourism destinations in the world. The Golf Tourism Development Group (GTDG) has a remit to improve the development, delivery and promotion of golf tourism in Scotland. The Scottish Golf Tourism Development Strategy 2013–2020 sets out the ambition to grow the market to fulfil the ambition that “by 2020, Scotland will be the world’s leading golfing destination”.

To ensure that the GTDG can develop its strategy based on sound market intelligence, VisitScotland and Scottish Enterprise commissioned research with golf visitors in 2016. The last Scotland-wide golf tourism research was conducted in 2007 and the data from this study was used as a basis for further economic impact research conducted by SQW in 2009 and 2011. The 2016 programme of research was, therefore, required to update the previous study and provide data for economic impact analysis.

A mixed method approach was used to gather the research data. The survey incorporated face-to-face interviews at golf courses (1,412 interviews), short ‘profile card’ questionnaires distributed at golf courses (1,118 cards returned) and an online survey (590 responses). All fieldwork was conducted between May and November 2016. Participating golf courses were selected to provide representation across the 10 key golf regions in Scotland and a spread of Tier 1, 2 and 3 courses.

The final data set was weighted in order to ensure it was representative of golf visitors across Scotland. Weighting factors were based on region, month and country of origin of visitor.

Profile of golf visitors

Across all golf visitors (including day and overnight visitors), approximately two thirds were from the UK (50% from Scotland, 19% from rest of UK) and one third was from overseas (19% from North America, 9% from Europe, 2% other). However, amongst overnight visitors there was a more equal split between domestic (53% - 27% Scotland; 26% rest of UK) and overseas visitors (47%). North Americans dominate the overseas market, accounting for 30% of all overnight visitors. Europeans accounted for around half as many overseas visitors (14%) and were most commonly from Germany or Sweden.

More than half of overseas visitors (57%), particularly Europeans, had been to Scotland before, suggesting that, for many, a trip to Scotland is not seen as a ‘once in a lifetime’ experience.

The age profile of golf visitors is skewed to the older age groups, with over three quarters aged 45+. Overall, only one in ten was female, however, this proportion was higher amongst European visitors (18%) and overnight visitors from Scotland (19%). In terms of socio-economic groups, the more affluent classifications (AB) dominate, accounting for 48% of all golf visitors and 58% of overseas visitors.

As we would expect, golf visitors also reported high levels of golf club membership and play golf frequently during the golfing season. In total, 83% reported that they have an official handicap, 85% are a member of a club and 79% play golf at least once a week. Amongst the respondents with a handicap, the average was 13.5.

Visitor Journey

Planning and Booking

The majority of overnight golf visitors start planning their trip more than six months in advance. As expected, those from overseas tended to plan their trip further in advance than those from the UK; the proportion planning more than 6 months ahead was higher for overseas visitors (67%) than for rest of UK (55%) or Scotland overnight visitors (27%).

For visitors from outside of Scotland whose main purpose for their trip was golf, Scotland's reputation and a long held desire to play golf in Scotland were the key motivations to visit. These reasons were particularly motivating for North American and European visitors. North American visitors were also more likely than Europeans or visitors from the rest of the UK to say they had been inspired to visit Scotland to play golf by an event held in Scotland.

The key sources of information that were helpful in planning their golf trip in Scotland were word of mouth recommendations (47%) and websites (46%). Smaller, but still significant, proportions of visitors (around 15%) mentioned personal advice from travel professionals and golf magazines and brochures, and these sources were more often mentioned by overseas visitors. The key websites mentioned by those who looked online were Google (76%), golf course websites (47%), VisitScotland (23%) and traveller review websites (23%).

Booking of both travel and accommodation tends to take place at least three months in advance of the trip; around two thirds of visitors stated this period of advance booking. A similar level of advance booking was stated for golf tee times for overnight visitors (61% at least 3 months in advance). Day trippers are far more likely to book their golf closer to the trip; 52% within 3 months or did not book (28% more than 3 months, 20% someone else booked).

Amongst overnight visitors who had booked in advance, just over a quarter had done so as a package, the majority of these through a specialist golf tour operator. North American visitors were especially likely to book via a package (38%).

Visitors booking their own golf used a variety of methods, although online (35%) and telephone booking directly with the course (25%) were the most frequently cited. When asked about their preferred method of booking their golf rounds, 53% of the total sample stated a preference for online booking. This suggests that some respondents were unable to book online, although they would have preferred to do so, perhaps due to the availability or quality of online booking facilities at some courses.

Trip Characteristics

Almost half of overnight golf visitors reported being on a short break of less than 4 nights, while one quarter were on a trip of 4 to 7 nights, and a quarter were on a holiday for more than 7 nights. As expected, the majority of visitors from Scotland and the rest of the UK were on a short break of less than 4 nights. North American visitors were the most likely to be visiting for longer breaks of more than 7 nights (63%), while Europeans enjoy a mix of trips, with a slight skew towards shorter breaks (less than 4 nights - 32%; 4 to 7 nights – 45%; more than 7 nights - 23%). The majority of overnight visitors (70%) included a non-golf day in their trip.

The number of rounds of golf played reflects the length of trip data. The average number of rounds played by overnight visitors was 5.16. Overnight visitors from Scotland (whose trips are shorter) play the lowest number of rounds (2.59). Overseas visitors played an average of 7.10 rounds, with visitors from North America playing more rounds (7.80) than those from Europe (4.94).

The majority of visitors (60%) were in small groups of 6 or fewer people. Most commonly, visiting parties consisted of friendship groups (50% of the total sample). This was true across all markets, though a significantly higher proportion (62%) of visitors from the rest of the UK described their group this way than did visitors from Scotland (46%) or overseas (49%).

The most frequently cited types of accommodation were hotels (67%) and B&Bs/guesthouses (28%), with 66% describing their accommodation as 'mid-market' and 32% describing it as 'luxury'. Overseas visitors were more likely to use top end luxury accommodation (42%) than visitors from Scotland (11%) or from other parts of the UK (21%).

In addition to golf, other activities are an important part of the trip for overnight visitors; the majority of overnight visitors participated in at least some activities, with walking, sightseeing and shopping the most popular. In total, four fifths visited an attraction and almost one third attended an event.

Almost two thirds of overnight visitors visited another part of Scotland during their trip (83% of overseas visitors). The most frequently cited other locations visited were Edinburgh (32%) and Fife (26%).

Visitor Experience

The majority of golf visitors to Scotland rated their experience very highly, both in terms of the golfing elements and other aspects of their trip.

When asked to score their golf experience on the day of interview, 86% rated it with a score of 8 to 10 out of 10, with a mean score of 8.93 out of 10. The most positive scores were provided by North Americans, visitors to Tier 1 courses, and those within socio-economic group AB. Furthermore, all respondents reported that their golf experience had either met (60%) or exceeded (40%) their expectations.

The majority of visitors also agreed strongly with statements indicating that Scotland is viewed as a top class golfing destination offering both variety and quality in its courses. Almost all agreed strongly that Scotland offers a good variety of golf courses and is a country worth visiting again to play golf. Similarly, the vast majority strongly agreed that Scotland's golf courses are of high quality and that the courses made them feel welcome.

The proposition that Scotland is 'the Home of Golf' was found to resonate with almost all respondents; 87% agreed strongly and 8% agreed slightly with this statement. Those from overseas (90%), in particular North America (95%), were more likely to agree strongly that Scotland is the Home of Golf, than those from Scotland (86%) or the rest of the UK (81%).

Indeed, of all overnight visitors, 81% overall agreed their trip was one of the best golfing holidays or short breaks they had ever taken. Visitors from outside of Scotland were also asked to rate their propensity to recommend Scotland as a golfing destination with a score out of 10. It is a reflection of the high levels of satisfaction that the majority were strongly inclined to recommend Scotland, scoring 9 (21%) or 10 (60%) out of 10.

The only aspect where a significant minority expressed dissatisfaction was with digital coverage. Although most visitors were broadly happy with digital coverage, positive scoring was weaker than for other aspects of the visit and, indeed, around one quarter of respondents expressed dissatisfaction.

Spend and Economic Value

On average, each day-trip visitor from Scotland spent £64.50 on their golf trip (including golf, travel, food and drink, purchases, etc.). This average includes those on a package trip and those who booked elements of their trip individually.

Overnight visitors tended to spend, on average, £318.12 per person per night. However, it is important to note that this overall average includes overseas visitors on a package trip, and therefore, includes some air travel to Scotland. The average spend for all overnight visitors, excluding those on a package trip, was £245.18 per person per night. Visitors from overseas tended to spend the most, averaging £338.49 per night, with those visiting from North America spending considerably more (£405.27 per night) than visitors from Europe (£257.18).

The spend data gathered during the survey was used to carry out full economic value analysis for golf tourism in Scotland. The analysis was conducted by SQW and the full results can be found in SQW's report (appendix E).

The economic value of golf tourism in Scotland combines the expenditure of staying golf visitors and the impact of hosting golf events. It does not include day visitors as it is assumed that the vast majority of this spend will be displaced from elsewhere in the Scottish economy.

Overall, the economic value of golf tourism for the Scottish economy is £286 million in output, 4,700 jobs and £154 million in GVA. The scale of output has increased by £66 million since the last study which used data from 2008. This represents growth of 30% or 4.3% per annum.

Estimates for the value of golf tourism in Scotland's regions have been calculated using the regional spend figures from staying visitors and day visitors (excluding those visitors who live within 30 miles of the course). The regional analysis does not include the impact of events or any multiplier effects. The top regions in terms of golf tourism are Fife (£52m direct output), Highlands (£23m), East Lothian (£22m) and Carnoustie Country (£20m). These results highlight the importance of golf tourism as an economic driver in many parts of rural Scotland.

Golf tourism in Scotland continues to be concentrated around the higher profile courses. There are 72 courses with visitor green fees of more than £150k and collectively they account for 82% of all visitor green fees in Scotland.

Introduction

1. Importance of Golf Tourism to Scotland

Tourism is one of Scotland's priority sectors with overnight visitors spending nearly £5 billion a year, supporting 200,000 jobs. Scotland is seen as the 'Home of Golf' and therefore golf tourism has an important role in attracting both domestic and international visitors.

SQW's research for VisitScotland and Scottish Enterprise in 2009 estimated that golf tourism was worth around £220 million in visitor expenditure and £120 million in Gross Value Added (GVA), which is the primary measure of economic output. In a further study in 2011, SQW estimated there was potential to grow golf visitor expenditure to £300 million by 2020. This forecast took into account new markets and increases in demand following the Ryder Cup, Open Championships and the re-introduction of golf at the 2016 Olympics. Other research by KPMG estimated that the wider golf economy (including domestic spending and retail) was worth around £1.2 billion in revenues and £496 million in GVA.

The Scottish Golf Tourism Development Strategy 2013–2020 sets out the ambition to grow the market over the coming years. It says, "by 2020, Scotland will be the world's leading golfing destination". This strategy reinforced the need for robust visitor surveys, market intelligence and updated economic impact assessments and this research is part of addressing that identified need.

2. Recent Developments

Since the latest published figures, there have been many developments that have affected the golf tourism market in Scotland. The 2014 Ryder Cup at Gleneagles and the 2015 Open Championship at St Andrews, new courses and investment (e.g. Donald Trump in Aberdeenshire and at Turnberry, and Arnold Palmer's plans for a new course at Castle Stuart) will all have influenced the size of the golf tourism market, both for spectators and players. Scotland boasts huge variety across nearly 600 courses and, according to Golf Digest, nine of the world's best 100 courses are in Scotland.

Global economic uncertainty, especially in mainland Europe (a key market for overseas golf visitors), may have resulted in slower growth than envisaged, but Scotland has continued to see strong growth in domestic visits.

The golf tourism market globally has also grown over recent years. According to IAGTO (the International Association of Golf Tourism Operators), 2015 saw the fifth consecutive year of growth in sales for golf operators, with an average annual increase of 10%. In 2015, IAGTO golf courses, resorts and hotels saw an increase of 5% in the number of golf visitors. Scotland regularly features in the top five golf destinations amongst IAGTO tour operators alongside the US, Portugal, Spain, Dubai and Ireland and, therefore, should benefit from these broader trends.

3. Research Requirement

A programme of research with golf visitors was commissioned in 2016 to update previous research and ensure that VisitScotland, Scottish Enterprise and their partners have accurate and reliable market intelligence to inform the implementation of the Scottish Golf Tourism Development Strategy 2013–2020.

4. Research Objectives

The overarching objective of the programme of research and analysis was to provide VisitScotland, Scottish Enterprise and their partners with comprehensive intelligence on the profile, motivations and experiences of golf visitors in Scotland, and to measure the overall economic impact of golf tourism at a national and regional level. Additional specific objectives included:

- To identify the profile of golf visitors at a number of golf course locations across Scotland, in terms of demographics, socio-economic group, visiting behaviour, country of origin and golfing ability
- To explore golf visitors' behavioural patterns before and during their visit - measured on a number of elements including motivations, key decision factors, travel behaviour, golf purchase patterns and activities during their stay
- To establish sources of information used before and during the trip, including the impact of marketing and promotion activity on golfer decisions and behaviour and the use of mobile and online technology
- To explore how golfers feel about their visitor experience and their overall satisfaction with their trip, including attitudes towards Scotland's tourism infrastructure, including transport, accommodation and hospitality
- To measure the economic impact of golf tourism at both a regional and national level and for UK visitors versus international visitors
- To explore the implications of the changing golf visitor profile for future golf tourism in Scotland

Method

1. Overview and Rationale

It was essential to capture data from a large robust sample of golf visitors from courses across Scotland. The research design also had to allow for the collection of a large quantity of data from each individual respondent on their visitor characteristics, the visitor journey (planning, booking, trip profile), the visit experience and spend data for economic impact analysis.

In order to meet these twin objectives, a mixed method approach to data collection was adopted.

- Short face-to-face interviews with golf visitors at courses
- Self-completion profile cards distributed to and collected from golf visitors at courses
- Follow-up online survey using email addresses captured during interviews and from profile cards

This approach to data collection allowed us to gather key details from golfers during the face-to-face interviews (including spend data), without intruding unduly on their golf day. The online survey meant that more in-depth data could be gathered, including an evaluation of their trip experience. The profile cards were vital in gathering basic information on golf visitors (e.g. country of origin, age, gender, type of trip) and gathering email addresses, and thus ensuring a large and robust response to the online survey.

2. Face-to-face Interviews

In total, 1,412 interviews were completed at courses. Interviewers worked with loose quota controls based on gender and origin, however, when courses only had a limited number of visitors then interviewers aimed to interview all visitors present on the day.

Each interview lasted approximately 10 minutes and was administered using CAPI technology (computer aided personal interviewing). Screening questions were used to ensure all respondents were visitors to the course and had travelled a minimum of 30 miles from their home.

French and German versions of the survey were available to respondents who did not speak English. These were scripted as a self-completion survey, whereby the interviewer handed the respondent the computer tablet to complete the survey in their own language. In total, 0.6% of the sample (9 respondents) completed the survey in French and 1% (14 respondents) completed it in German.

Sampling

At the start of the research study a sampling plan was developed to ensure interviews were spread across key golfing regions, and across the six months of fieldwork. This plan involved conducting two interviewing shifts per course (across 60 courses) and spreading interviews from May to October 2016, with a higher weighting in the months of June, July and August. It also involved including a representative sample of golf courses across all three tiers.[1]

[1] Tier number is allocated to all golf courses across Scotland. The Tier number is based on the value of green fees at a particular course with Tier 1 being the highest.

The original sampling plan had to be adjusted as fieldwork progressed, however, due to a number of challenges, including:

- Only 49 courses agreed to take part in the research (out of 60 courses that were asked to participate)
- A number of courses had fewer visitors than anticipated (e.g. Tier 3 courses)
- The set up phase of the research (contacting courses, obtaining permissions, etc.) took longer than expected

These issues necessitated conducting additional interviewing shifts at a number of courses. The challenges during the set up phase also meant that fewer interviews were completed in May than had been planned. Difficult weather conditions in July also led to fewer than expected interviews being conducted.

The final data set was weighted to take account of these issues and ensure that the final analysis was based on a representative sample of golf visitors. Further detail on data weighting is provided below.

3. Profile Cards

Questionnaire cards were designed to gather basic profiling information from golf visitors, as well as email addresses for the online survey. These cards were provided to participating golf courses on a monthly basis, with instructions to hand them out to a random sample of golf visitors over the course of one week each month.

In total, 1,118 completed cards were returned by the courses. However, whilst many courses distributed the cards as instructed, some did not actively hand them to visitors, which meant that fewer returns were received than anticipated.

4. Online Survey

The email addresses gathered via the face-to-face interviews and profile cards were used as the sampling frame for the online survey. The survey was designed to capture detailed visitor journey data, as well as feedback and appraisal of all aspects of the visitor's trip experience.

The survey took around 15 minutes to complete, and French and German language versions were provided – 1% completed it in French and 2% completed it in German.

Invitation emails to respondents were sent two weeks following their face-to-face interview or receipt of their profile card. In total, 1,682 email invitations were sent successfully, resulting in 590 completed responses (35% response rate).

5. Final Data Set and Weighting

Combining the findings from the face-to-face interviews with responses to the online survey resulted in a total sample of 1,745 responses. However, not every respondent answered every question – some responded to the face-to-face interview only, some responded to the online survey only (as they provided their email address via the profile cards) and some answered both. Furthermore, questions in the surveys were routed based on various criteria, such as type of trip (day or overnight), country of origin (Scotland, UK, Overseas) and purpose of trip (golf main purpose, golf not main purpose). This means that base sizes vary considerably throughout this report, and some questions have a relatively small base size. Where a question does have a small base size, this is indicated clearly and caution should be exercised in interpreting the findings.

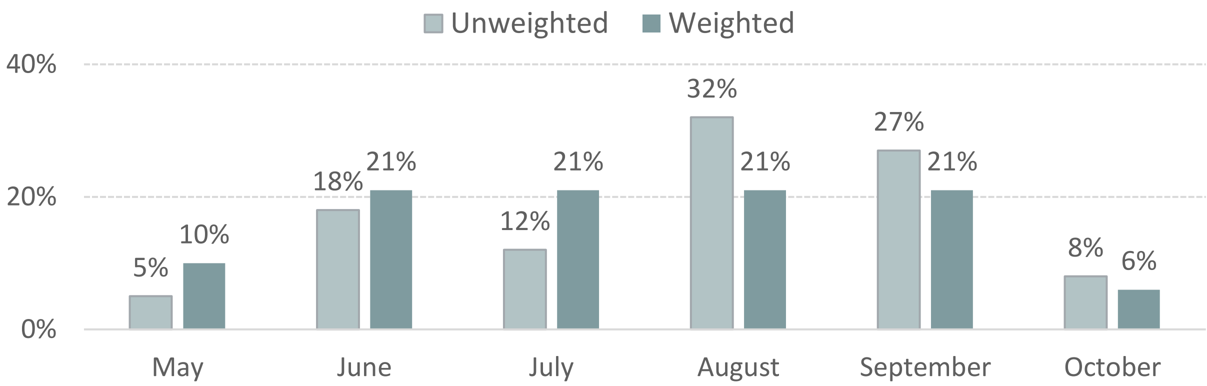
The margin of error on the total data set of 1,745 is between ±2.3% and ±0.5%, calculated at the 95% confidence level (market research industry standard). The margin of error on small base sizes will be larger. For sub-sample analysis, only differences that are statistically significant are reported.

As previously noted, the final data set was weighted in order to achieve a representative sample. The data set was weighted by month, region and country of origin. The basis for weighting targets are detailed below:

- Month – data weighted back to original sample plan
- Region – data weighted to figures provided by SQW on numbers of visitor rounds played in each region[2]
- Origin – data weighted based on figures from face-to-face interviews

The weighted and unweighted data on each of these variables is detailed below.

Chart A: Weighting by month



[2] SQW collected data on visitor rounds during its research with golf courses across Scotland. This data was judged to be accurate and representative due to the sample correlating closely to the spread of golf courses across regions in Scotland. The SQW sample was slightly skewed to higher value courses, however, it was felt this was likely to reflect the higher proportion of visitors to such courses, compared to lower value courses.

Chart B: Weighting by region

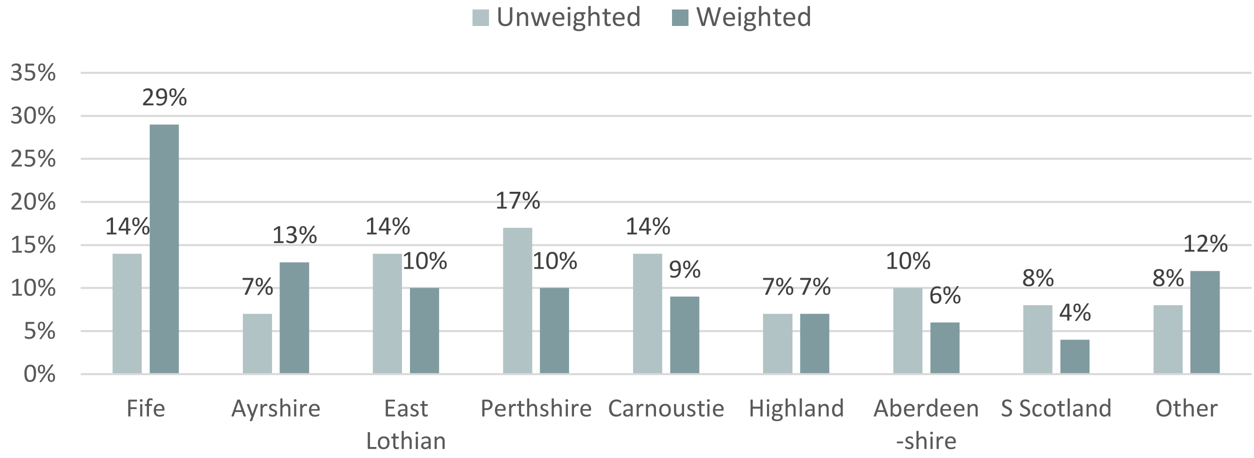
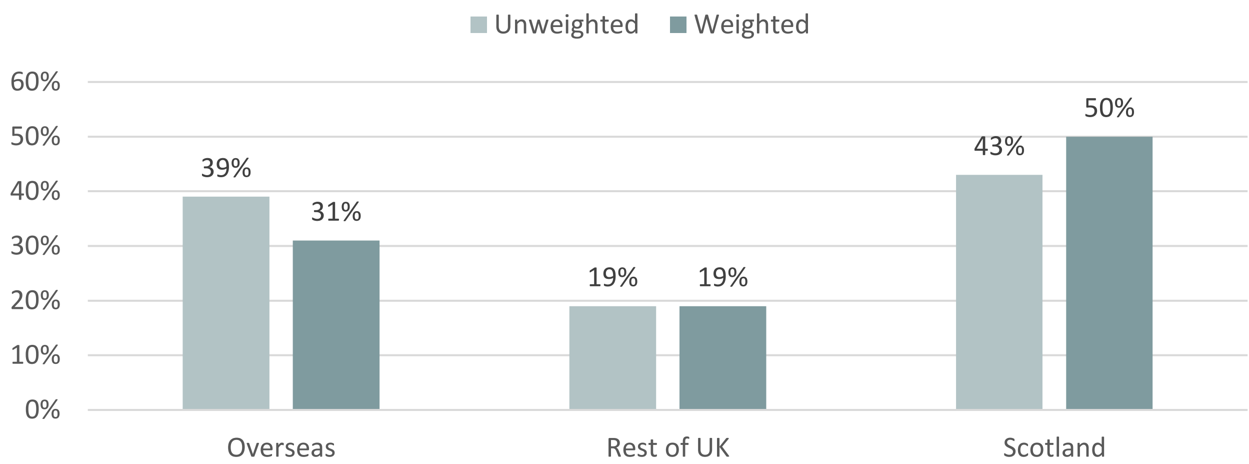


Chart C: Weighting by origin



6. Economic Impact Data Collection

The data used to calculate the economic impact of golf tourism in Scotland was collected via the face-to-face survey (spend data from golf visitors) and via an online survey with golf courses across Scotland conducted by SQW. The online survey was boosted with additional telephone interviews to ensure a robust sample and all key courses for golf tourism were included. Full details of the SQW method of data collection can be found within the report 'Scottish Golf Visitor Survey and Economic Impact – Economic Impact Analysis' (appendix E).

7. Analysis and Reporting

This report outlines the findings of the 2016 Scottish Golf Visitor Survey. The findings of the economic impact element of the research is reported in detail in the SQW report 'Scottish Golf Visitor Survey and Economic Impact – Economic Impact Analysis'.

This report includes top line findings and cross- tabulation analysis by:

- Origin 1 – Scotland; rest of UK; overseas
- Origin 2 – North America; Europe
- Day trip vs overnight
- Age and gender

Data cross-tabulated by region is included in the appendices, and regional summary reports have been provided separately.

Differences between sub-groups are only reported where bases sizes are sufficiently robust, and where differences are significant at the 95% confidence interval. Sample sizes for each sub-group (unweighted) are detailed below.

Table A: Sub-samples for analysis

Sub-group	Total base size* (unweighted)	Sub-group	Total base size* (unweighted)
Origin		**Age**	
Scotland	746	18 – 34	146
Rest of UK	326	35 – 44	214
Overseas (total)	673	45 – 54	440
North America	409	55 – 64	565
Europe	205	65+	377
Trip Type		**Gender**	
Day trip	573	Male	1,536
Overnight	1,172	Female	209
Total	**1,745**		**1,745**

Sub-group	Total base size* (unweighted)	Sub-group	Total base size* (unweighted)
Region			
Aberdeenshire	179	East Lothian	237
Ayrshire	123	Carnoustie Country	241
South Scotland	139	Highland	128
Perthshire	304	Other	145
Fife	249		
Total	**1,745**		**1,745**

Carnoustie Country included the following five golf courses; Carnoustie Golf Links, Panmure Golf Club, Monifieth Golf Club, Montrose Links and Edzell Golf Club.

The golf courses that did not fall into one of the regions above were categorised as ‘other’. This category included Machrihanish Dunes Golf Club, Haggs Castle Golf Club, Lanark Golf Club, Mar Hall and West Lothian Golf Club.

Main findings

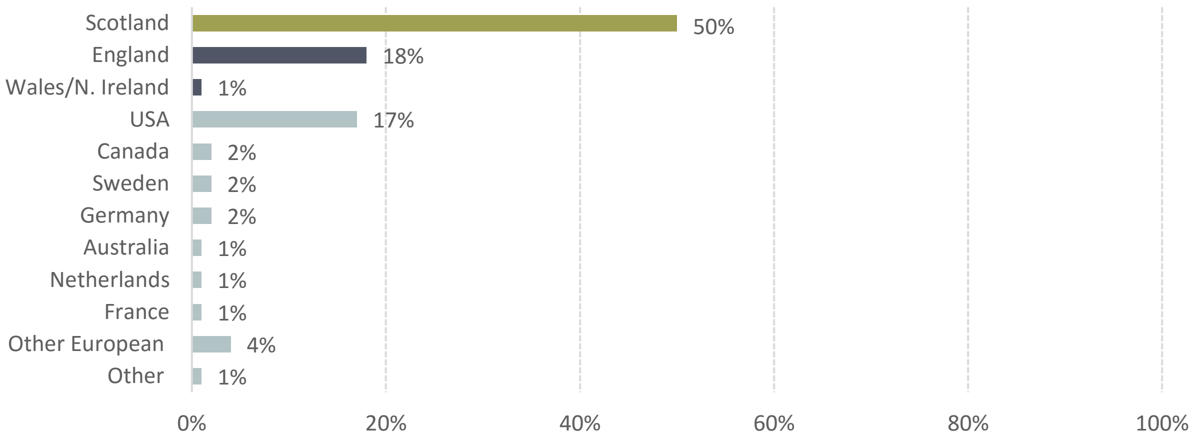
1. Profile of Golf Visitors

1.1 Country of Origin

Across the total sample of golf visitors, over two thirds were from the UK, with 50% from Scotland, 18% from England and 1% from Wales or Northern Ireland. Just under one third were from overseas, most of whom were from North America (19%) or Europe (9%).

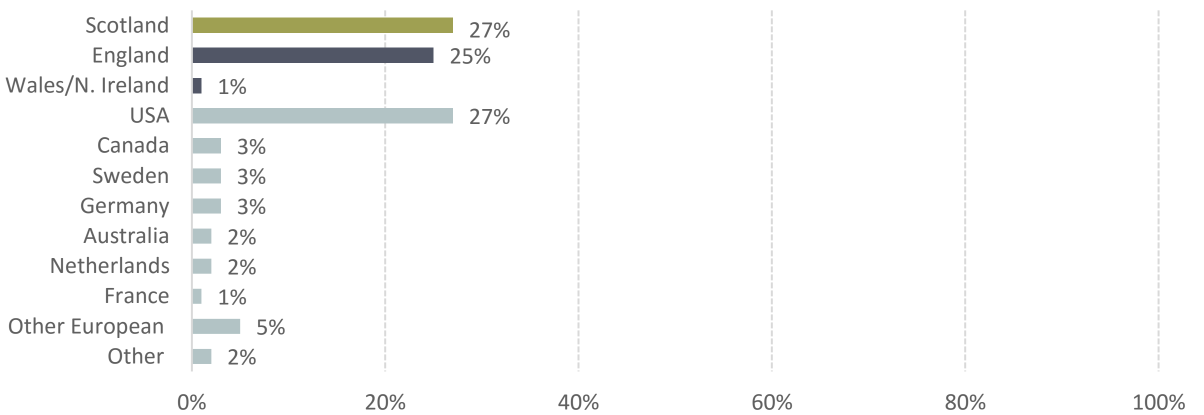
Amongst overnight visitors only, there was a more equal split between domestic (53%) and overseas visitors (47%). In total, 30% of overnight visitors were from North America and 14% were from Europe (most commonly from Germany or Sweden).

Chart 1.1: Country of residence – all visitors



Base (all): 1745

Chart 1.2: Country of residence – overnight visitors



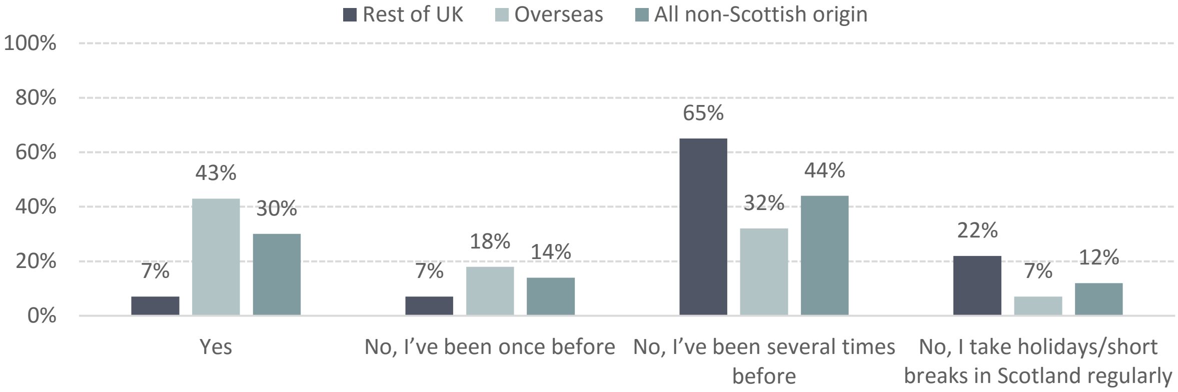
Base (overnight visitors): 1,172

1.2 Previous Visits

In total, 30% of visitors (those not resident in Scotland) were first time visitors and 70% were repeat visitors to Scotland.

Overseas visitors were more likely (43%) than visitors from the rest of the UK (7%) to be first time visitors. However, the majority of overseas visitors (57%) had been to Scotland before, suggesting that, for many, a trip to Scotland is not seen as a 'once in a lifetime' experience. Indeed, the high prevalence of repeat visitors also indicates satisfaction with previous visits prompting a return. European visitors were more likely to have been to Scotland before (63%) than those from North America (51%).

Chart 1.3: First time visit to Scotland by origin

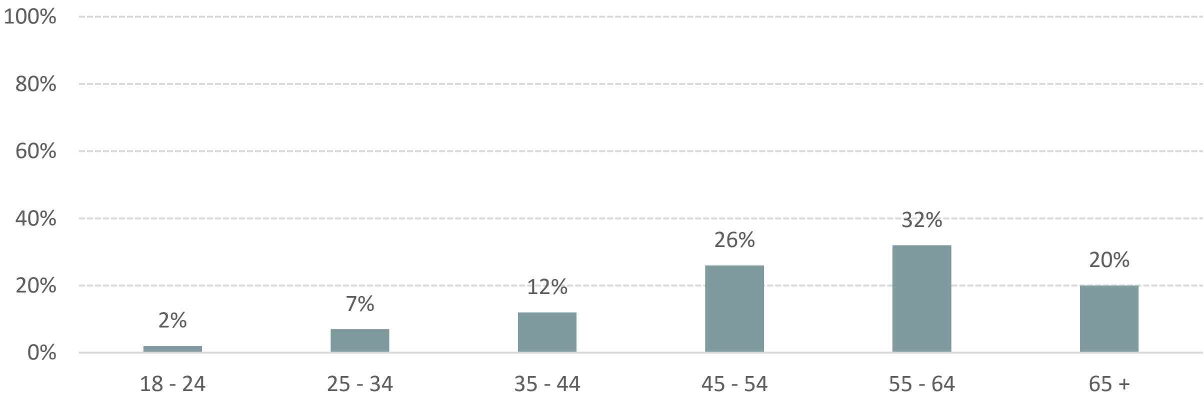


Base (all non-Scotland residents): 899, (Rest of UK):287, (Overseas): 612

1.3 Demographic Profile

The age profile of golf visitors is skewed to the older age groups. Over three quarters of golf visitors are aged 45+, with the 55-64 age range accounting for almost a third (32%).

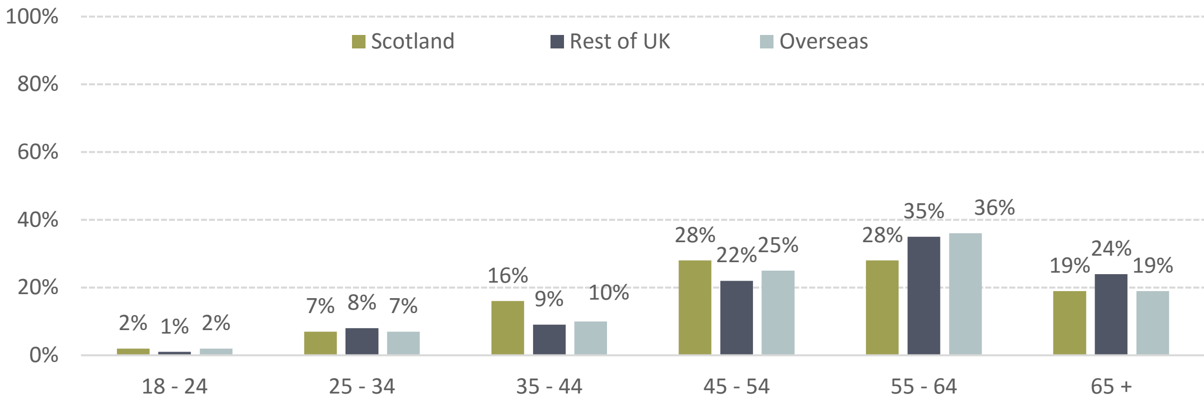
Chart 1.4: Age



Base (All): 1745

As chart 1.5 illustrates, those visiting from Scotland have a younger age profile: 25% are aged under 45, compared to 18% of visitors from the rest of the UK and 19% of overseas visitors. However, amongst Scotland overnight visitors the age profile is similar to the profile of rest of UK and overseas visitors, with 21% under 45 years. Day-trippers from Scotland have a slightly younger age profile (27% under 45).

Chart 1.5: Age by origin



Base (all): Scotland 873, Rest of UK 332, Overseas 541

Across the total sample of golf visitors, 88% were male and 12% were female. There were some variances in this finding by origin, with European visitors showing the highest proportion of female visitors (18%). This proportion was similar for North American visitors (13% female) but higher than rest of UK (10%) and Scotland visitors (11%). Interestingly, however, overnight visitors from Scotland were more likely to be female (19%) than day visitors (7%).

Chart 1.6: Gender – total sample

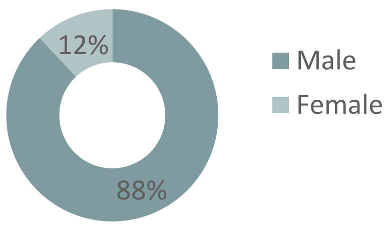
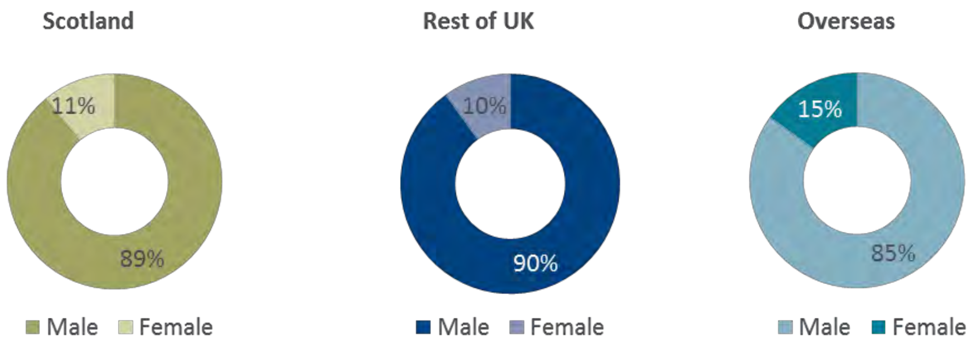


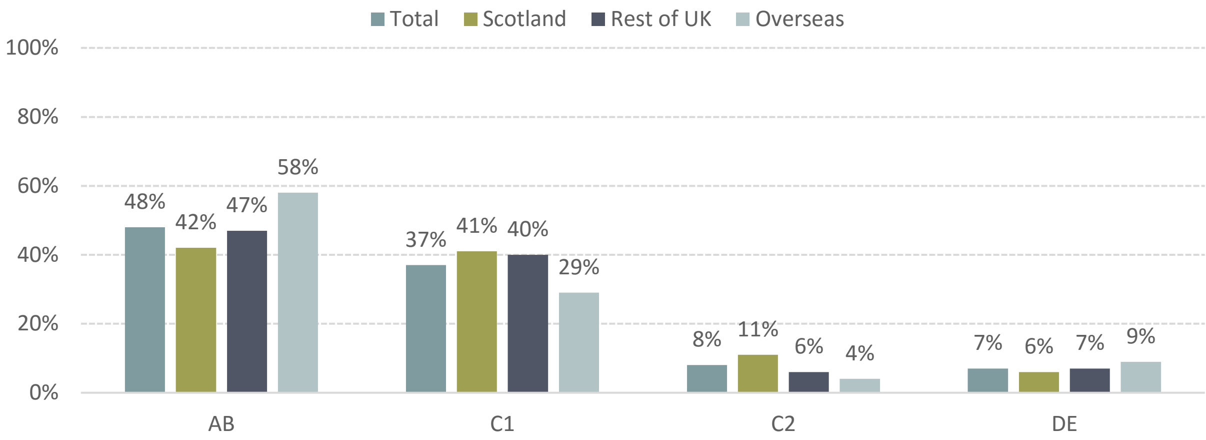
Chart 1.7: Gender by origin



Base (all): Scotland 873, Rest of UK 332, Overseas 541

Looking at socio-economic group (SEG), the more affluent groups (AB) predominate, accounting for 48% of the total sample and 58% of overseas visitors. North American visitors (58%) and Europeans (56%) were equally likely to be within the AB Socio-economic group. Visitors from Scotland or the rest of the UK were more likely to be evenly split between the AB and C1 socio-economic groups.

Chart 1.8: SEG by origin



Base (all, excluding refused): Total 1605, Scotland 722, Rest of UK 308, Overseas 575

1.4 Golf Trip Behaviour

The majority of golf tourism visitors are enthusiastic, dedicated and skilled golfers. In total, across the whole sample, 83% reported that they have an official handicap, 85% are a member of a club and 79% play golf at least once a week. Amongst the respondents with a handicap, the average was a handicap of 13.5.

Female golf visitors are more likely to be a golf club member (96%) and play more often (85% at least once a week on average) than males (84% and 79% respectively). Female golfers tended to have a higher handicap (female average 18; male average 13) and rated their ability lower than male golfers.

A very small proportion of the visitors were country (2%) or overseas members (1%). The majority of visitors tend to take golfing holidays or breaks somewhere at least once a year (87%).

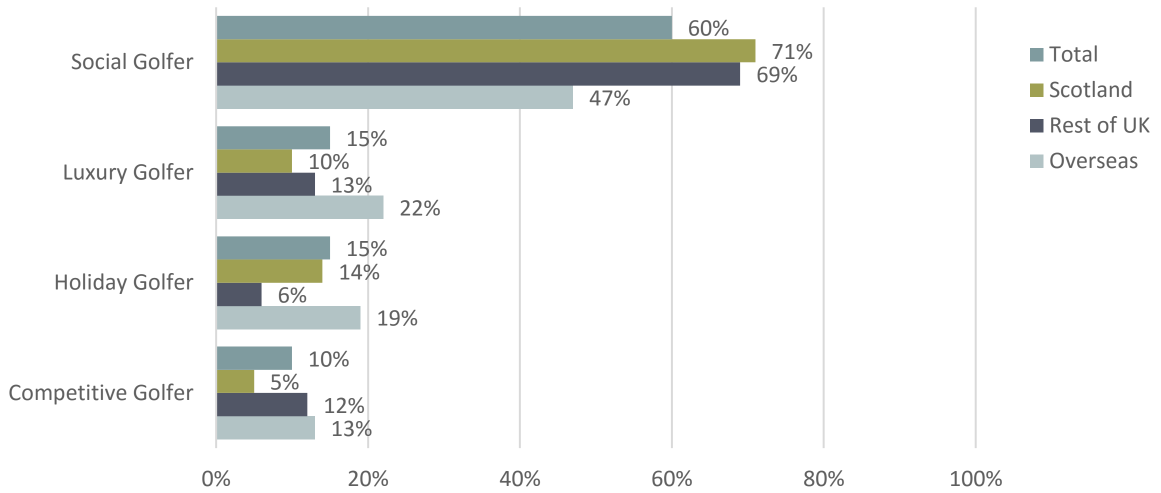
Respondents were asked to state which of four different golf visitor typologies they felt best described the types of golf trip they tend to take. These typologies are derived from previous research conducted by VisitScotland investigating golf visitor behaviour. The typologies and the descriptions which were read to respondents are detailed below:

- **Social golfer** - I most often like to take golfing breaks with groups of friends, where socialising and sharing time with them is as important as the golf experience
- **Luxury golfer** - I most often like to take golfing breaks to top class courses with luxury hotels to enjoy the best courses, facilities, accommodation and restaurants, and have an all-round first class experience
- **Holiday golfer** - I most often like to take golfing breaks as part of a holiday, which includes other activities and may be taken with family and friends who are not golfers
- **Competitive golfer** - I most often like to take golfing breaks to the most challenging and difficult courses in order to improve my game and compete with friends. The challenge of the course and the opportunity to compete with others (and myself) are paramount

All visitors and subgroups are more likely to identify themselves as social golfers rather than any other type. However, visitors from Scotland (71%) and the rest of the UK (69%) were more likely to be social golfers than those from overseas (47%). Overseas visitors were the most likely sub-group to identify themselves as holiday (19%) or luxury golfers (22%). There were no significant differences in typologies between European and North American visitors.

Although many females also identified themselves as social golfers (35%), this was far fewer than males (59%), and a higher proportion described themselves as luxury (29%) or holiday golfers (21%) than males (12% for both).

Chart 1.9: Golfer type



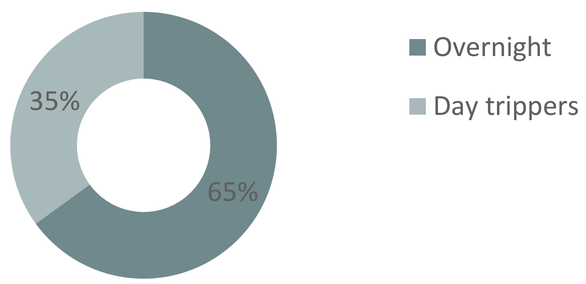
Base (all online): 590

Equal proportions of respondents played at Tier 1 (37%) and Tier 2 (37%) golf courses, while a smaller proportion (26%) played at a Tier 3 course. Overseas visitors were the most likely to play a Tier 1 course (60%), compared to rest of UK visitors (38%) and those from Scotland (22%). In particular, a high proportion of visitors from North America played Tier 1 courses (66%), compared to those from Europe (47%). Visitors from Scotland were more likely to play Tier 3 courses (39%) than those from the rest of the UK (24%) or overseas (6%).

Amongst residents from Scotland, 65% were day-trippers and 35% were staying overnight. In comparison, 12% of visitors from the rest of the UK were day-trippers and 88% were staying overnight. Females were less likely to be visiting Scotland on a day trip (20%) than males (37%).

The vast majority of visitors were on a leisure trip, with only 3% saying their visit was a business trip, with little variation by origin: rest of UK (5%) and overseas visitors (4%) were slightly more likely to be on a business trip than visitors from Scotland (2%) were.

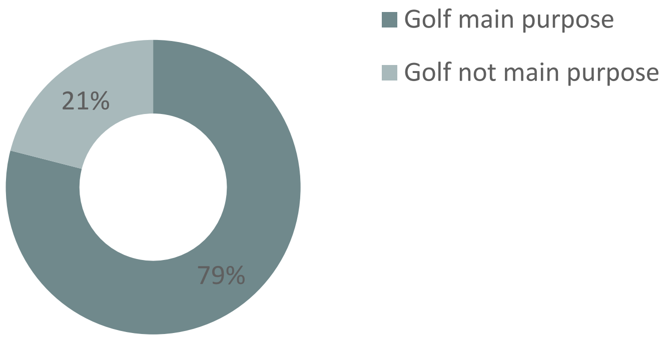
Chart 1.10: Trip type



Base (all): 1,745

For over three quarters (79%) of overnight visitors, golf was the main purpose of their trip, with little variation by origin (Scotland: 76%, rest of UK: 79%, overseas: 81%). Findings were also consistent between North American (82%) and European (81%) visitors.

Chart 1.11: Golf main purpose of trip



Base (overnight visitors): 1155

1.5 Profile of Golf Visitors – Summary of Key Findings

In broad terms, the total sample of visitors was two thirds domestic: one third overseas visitors, and closer to 50/50 for overnight visitors (53% domestic and 47% overseas). Half of all visitors (50%) live in Scotland and almost a further fifth (19%) live in the rest of the UK. By far the largest of the overseas markets is the USA, which accounts for 17% of visitors overall and 27% of overnight visitors. European visitors accounted for 10% of all visitors and 14% of overnight visitors.

Amongst Scotland visitors, two thirds were day visitors and one third was staying overnight.

There was a high proportion of repeat visitors amongst the sample from outside Scotland – 93% of visitors from the rest of the UK and 57% of visitors from overseas had been to Scotland before.
In terms of the demographic profile of golf visitors, this was skewed towards males (88%) and the older age groups (78% over 45 years old). This profile was similar across all markets, although European and Scotland overnight visitors showed higher than average proportions of females (18% and 19% respectively).

Typically golf visitors to Scotland are enthusiastic and skilled golfers. Indeed, 79% play at least once a week, while 85% are a golf club member. More than four fifths (83%) reported having a handicap, with the average for the whole sample being 13.5.

In terms of the types of golf trips respondents like to take, the majority identified themselves as ‘social golfers’, i.e. they tend to take trips with groups of friends and enjoy the social aspects as much as the golf itself. Amongst overseas visitors, higher than average proportions identified themselves as luxury (22%) or holiday (19%) golfers.

Analysis of the profiling data revealed some differences between visitors by origin and gender, although these differences tended to be fairly minor with the profile largely consistent regardless of where the golf visitor came from.

Some ‘pen portraits’ of visitors are detailed over to demonstrate the key characteristics of each group.

Pen portraits of golf visitors	
Scotland: - Younger profile compared to other visitors – skewed by day trip visitors - Mid social grade AB, C1, C2 – overnight visitors more likely to be ABs, day trip visitors likely to be C1C2 - More likely to play Tier 3 courses - High proportion of social golfers, particularly day trippers	Rest of UK: - Higher proportion of 65+ - Higher social grades ABC1 - Describe golfing ability as average - Play a mix of tier courses
Europe: - Higher than average females - Middle age range (45-64) - Higher social grade ABC1 - A member of a golf club - Describe golfing ability as good - Play Tier 1 and Tier 2 courses	North America: - Older (tend to be 55+) - Higher social grade ABC1 – particularly ABs - Have a low handicap or describe golfing ability as good - Play Tier 1 courses
Females: - Middle age range (45-64) - Higher social grade ABC1, particularly ABs - A member of a golf club - Handicap higher than males - Play Tier 1 and Tier 2 courses - Play golf regularly (at least once a week) - More likely to be luxury or holiday golfers than males	

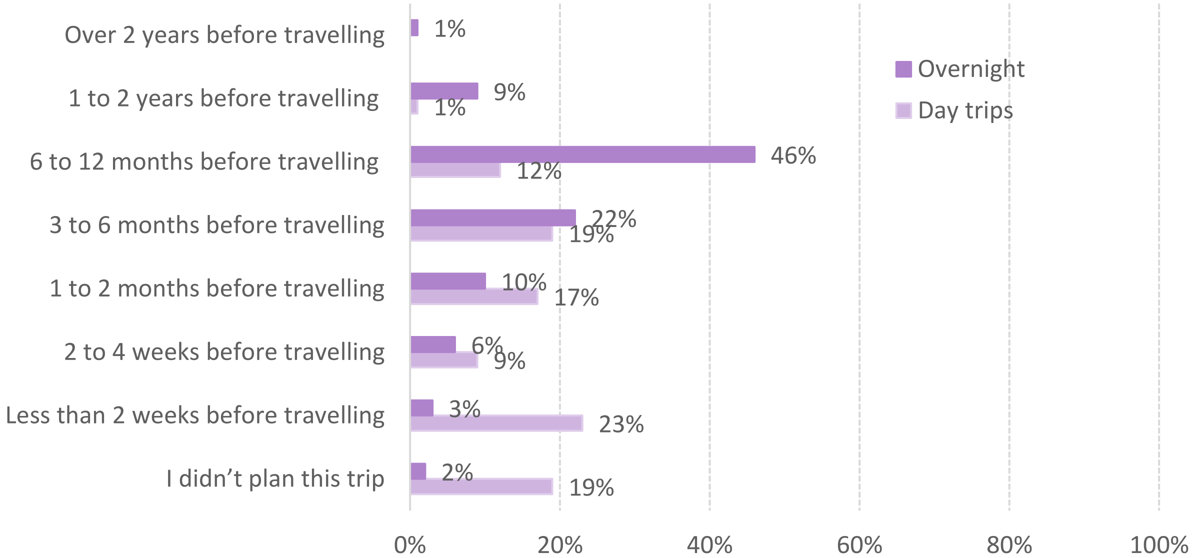
2. Visitor Journey

2.1 Planning

2.1.1 Lead times

The length of time visitors spent planning their trip was very dependent on the type of trip. Day trips require less advance planning; one third were planned within one month of the trip (two-thirds within 6 months). Visitors on an overnight trip were far more likely to plan more than 6 months in advance (56%). The proportion planning more than 6 months ahead was higher for overseas visitors (67%) than for rest of UK (55%) or Scotland overnight visitors (27%).

Chart 2.1: When start thinking about and planning trip – by day vs overnight



Base (all online): day trip 131; overnight 459

2.1.2 Reasons for choosing Scotland and region

For visitors to Scotland whose main purpose for their trip was golf, Scotland's reputation and a long held desire to play golf in Scotland were the key motivations to visit. These reasons were more likely to be mentioned by North American and European visitors than those from the rest of UK.

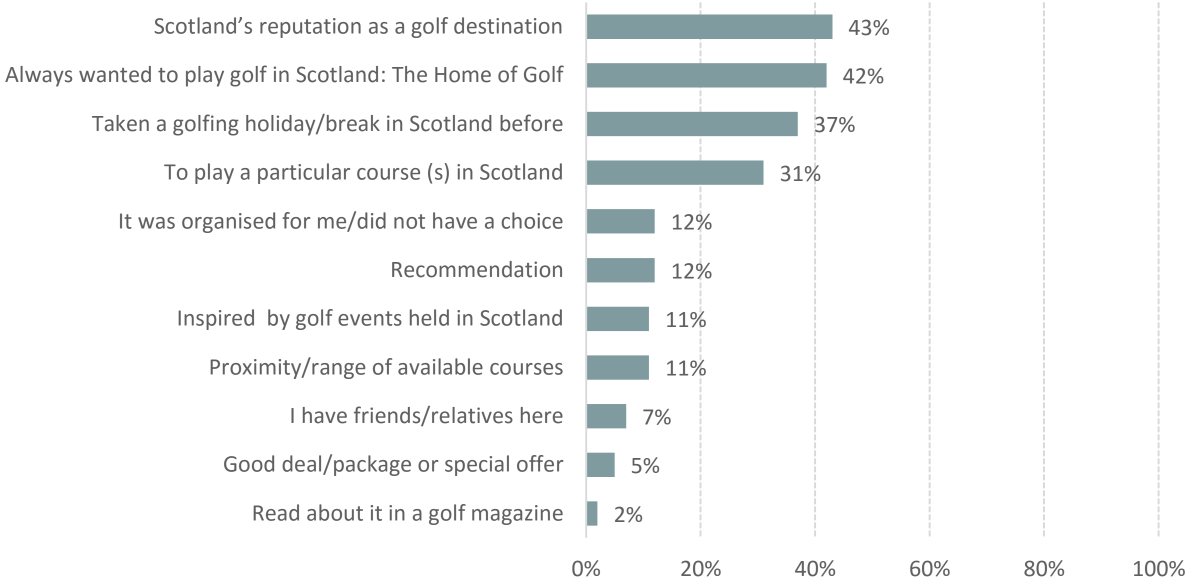
- Scotland's reputation – N America (51%); Europe (47%); rest of UK (31%)
- Always wanted to play in Scotland (Home of Golf) - N America (58%); Europe (55%); rest of UK (19%)

North American visitors were also more likely (15%) than Europeans (9%) or visitors from the rest of the UK (9%) to say they had been inspired by an event held in Scotland.

Men were more likely to be motivated by playing a particular course (33%) than women are (19%).

For most visitors, price and/or special deals were not important to the decision to come to Scotland. However, it is not possible from this research to say whether price impacts on the decisions of those who **do not** choose to visit Scotland, as we have only sampled visitors.

Chart 2.2: Reasons for choosing Scotland



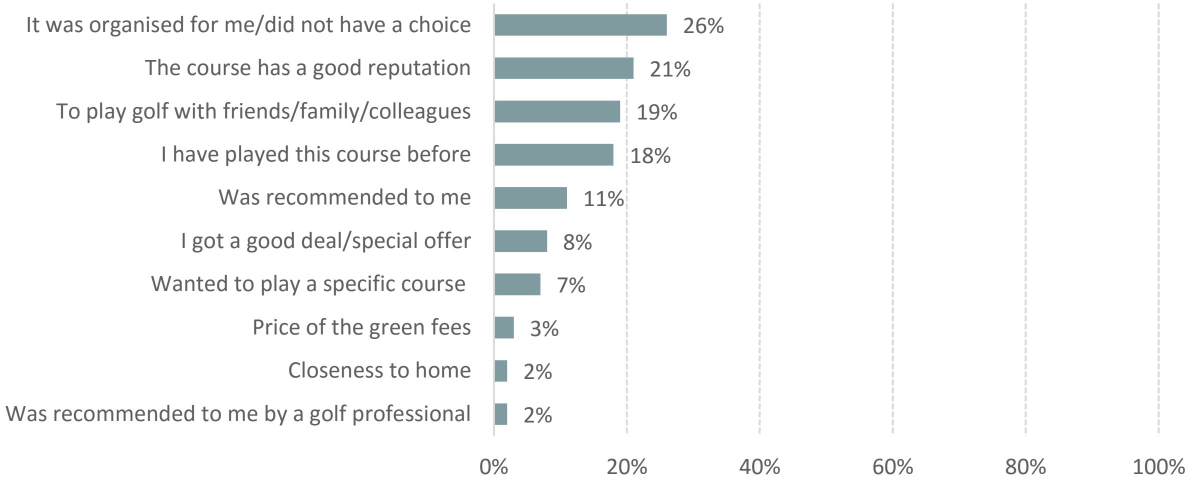
Base (overnight & golf main purpose of visit excl. Scotland residents): 756

All day visitors and visitors from Scotland whose main purpose was to play golf were asked why they chose the location within Scotland that they visited (i.e. the region). There was not found to be one predominant reason for selecting a particular region to play golf, instead respondents tended to state that it was organised by someone else (26%), the course itself has a good reputation (21%), to play with family and friends (19%) or because they had played the course before (18%).

It is not surprising that this group of visitors (predominantly visitors from Scotland) stated reasons connected to the course itself as their main motivations, rather than factors connected to the region. As golf is the main purpose of the trip they are likely to choose based on the course, including factors such as providing both the right level of challenge and the quality of facilities they are seeking.

Price (3%) and deals/offers (8%) were less likely to be mentioned as key motivations, however, with almost one in ten mentioning a deal or offer, price sensitivity is something that courses should be aware of. As previously mentioned, the research does not cover potential visitors who decided not to take a trip, or who took a different type of trip on the basis of cost.

Chart 2.3: Reasons for choosing region



Base (Day visitors, Scotland residents overnight and golf main purpose of visit): 744

Overnight visitors were more likely to state that they wanted to play a specific course (15%) than day-trippers (4%). Day-trippers were more likely than overnight visitors to state that the trip was organised by someone else and they had no choice in location (29%).

Amongst the 228 respondents for whom golf was not the main purpose of the trip (all markets/countries of origin) a number of reasons for choosing Scotland or the region (Scotland visitors only) were cited. Despite the fact that these respondents reported that golf was not the main purpose of their trip, always wanting to play golf in Scotland (Home of Golf) was the top reason for choosing Scotland (selected by 43% of visitors from rest of UK/overseas). A further one third of visitors from the rest of the UK/overseas stated that Scotland is a place that they had always wanted to visit.

Only a small number of visitors from Scotland stated that golf was not the main purpose of their trip, and hence answered this question (41 respondents). These respondents tended to report that they chose the region because of the range of activities available, because it was recommended or to visit family or friends.

Respondents were asked specifically whether golfing events had inspired them to play golf in Scotland, scoring the influence on a scale of 1 (did not inspire me at all) to 10 (was entirely my inspiration for coming). For visitors from the rest of the UK and overseas, 44% said events were a strong influence (scores 7 – 10); 23% a moderate influence (scores 5 – 6); and 31% a weak influence (scores 1 – 4). The base size for this question is low, however, the data indicates that golfing events are more influential for overseas visitors in choosing to come to Scotland than for those from the rest of the UK.

Amongst Scottish residents, the decision to play a specific course was more likely to be influenced by golfing event than for overseas/rest of UK visitors choosing Scotland - 56% gave a score of 7 or more.

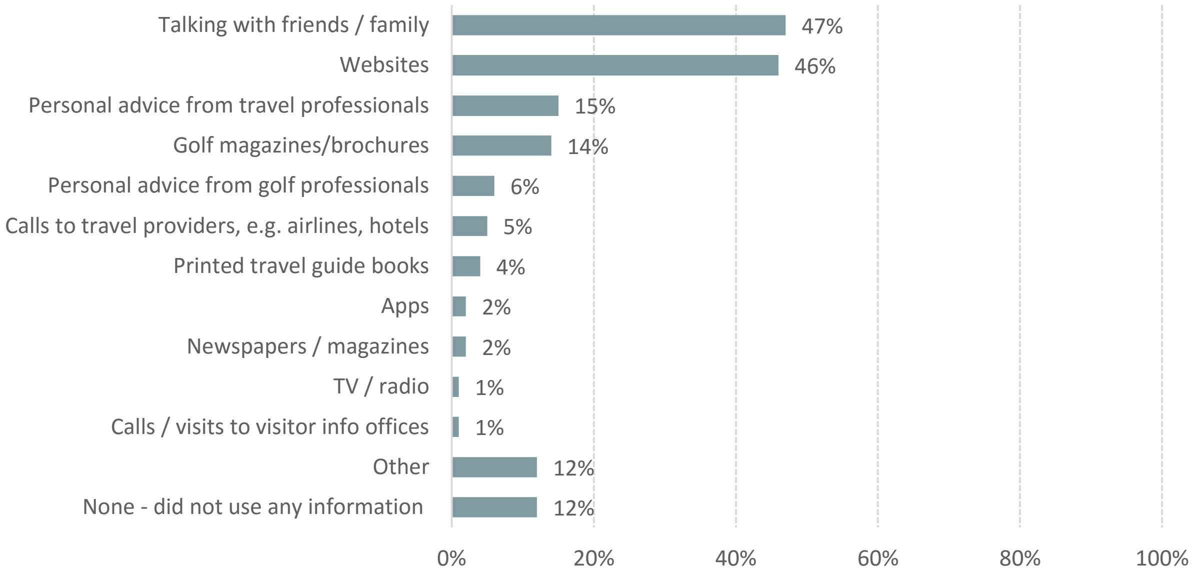
2.1.3 Information sources

When asked about types of information that were helpful in planning their trip, word of mouth (47%) and websites (46%) stand out as key sources. However, compared to general leisure visitors (websites: 70%; talking with friends/family: 58%)[3], golf visitors are less likely to use these sources of information.

[3] Scotland Visitor Survey 2015

A further 15% of visitors mentioned personal advice from travel professionals and 14% reported that they used golf magazines and brochures.

Chart 2.4: Information sources used during planning

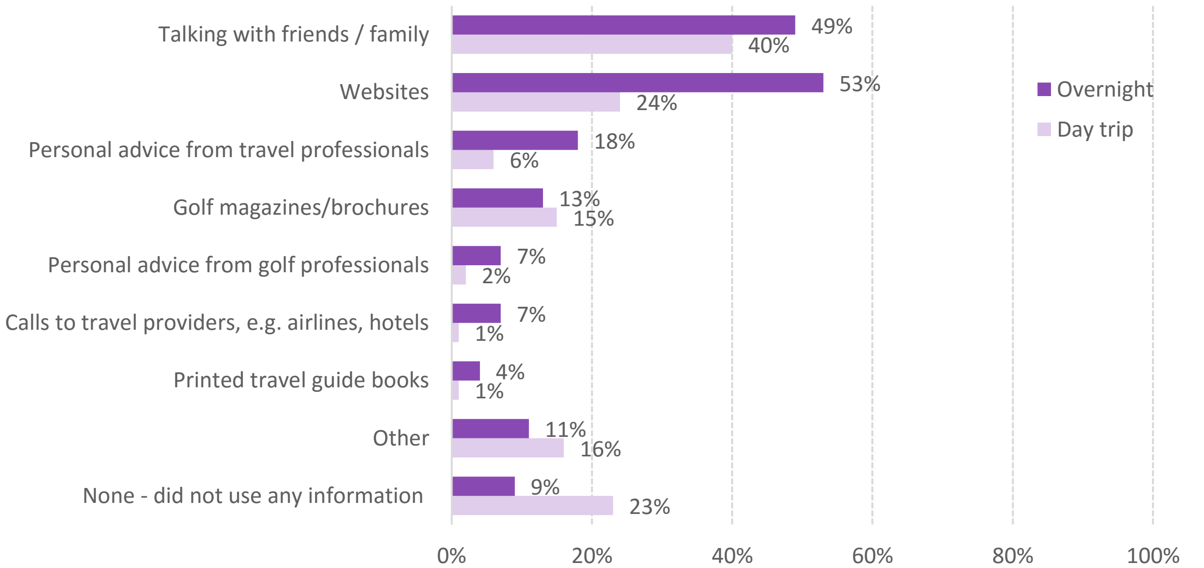


Base (all online who planned): 553

Overnight visitors are particularly proactive and more likely to use a range of sources of information during the planning stage. They were significantly more likely than day-trippers to mention websites (day 24%; overnight 53%), advice from travel professionals (day 6%; overnight 18%), advice from golf professionals (day 2%; overnight 7%) and calls to travel providers (day 1%; overnight 7%). Day visitors were equally likely to use less formal sources of information – talking with friends/family (day 40%; overnight 49%) and reading golf magazines (day 15%; overnight 13%) and significantly more likely than overnight visitors to say that they did not use any information sources (day 23%; overnight 9%).

Three percent or less of either type of visitor used apps, newspapers/magazines, TV/radio or calls/visits to visitor information offices.

Chart 2.5: Information sources used by type of trip

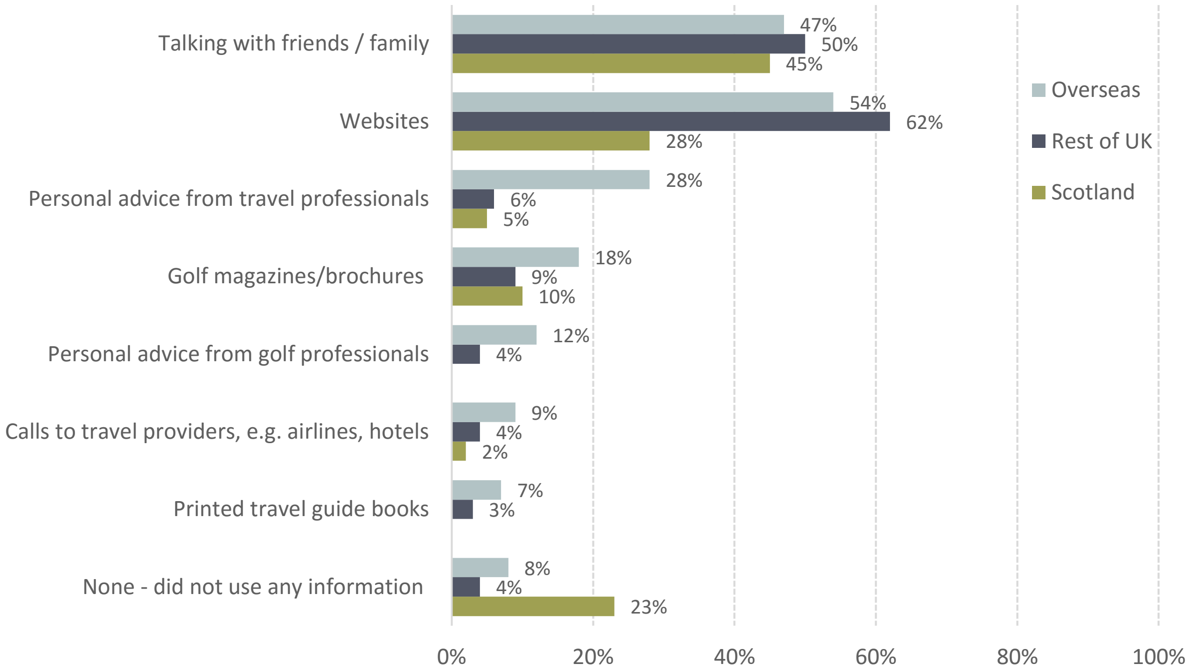


Base (all online who planned): day trip 107; overnight 446

Word of mouth was found to be important across all markets by origin. However, online sources are more important to visitors from the rest of the UK (62%) and overseas (54%) than those visiting from Scotland (28%). Overseas visitors are the most likely to use a range of sources, such as advice from travel (28%) and golf (12%) professionals, golf press (18%), calls to travel providers (9%) and travel guide books (7%). North American visitors were the most likely to mention personal advice from travel professionals (37%) and golf magazines and brochures (20%).

Visitors from Scotland are significantly more likely not to have used any information sources: almost one quarter of Scotland visitors did not use any information. This was consistent across both day-trippers (24%) and overnight visitors (20%) from Scotland.

Chart 2.6: Information sources used by origin

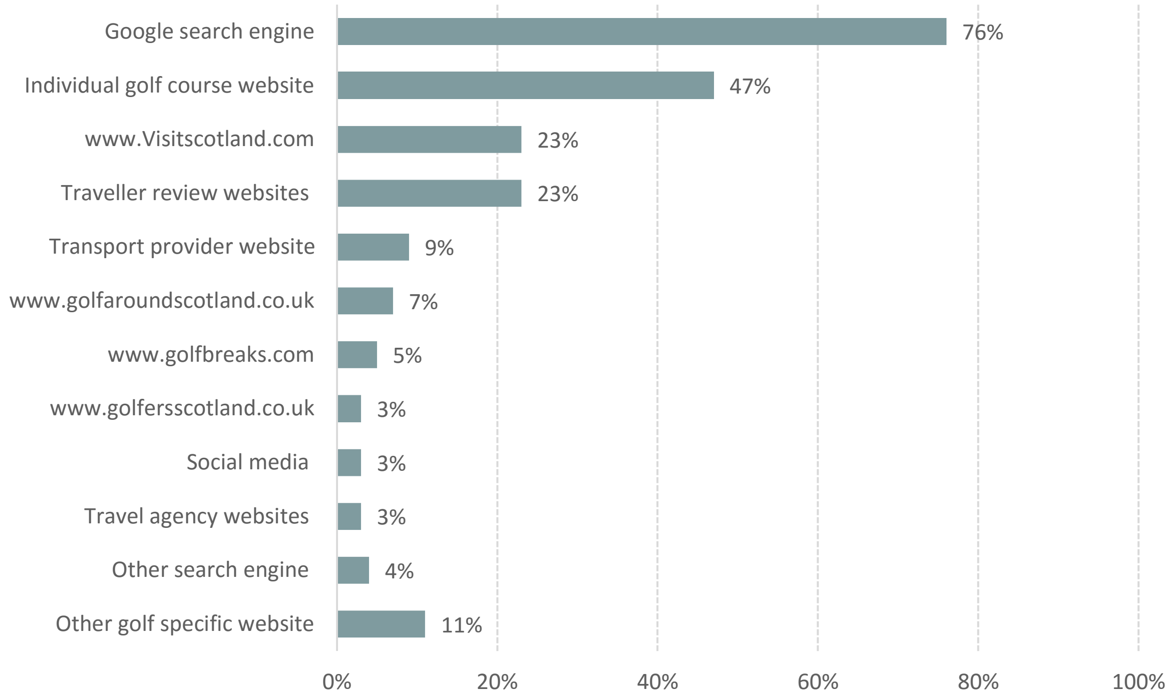


Base (all online who planned): Scotland 147, Rest of UK 100, Overseas 306

Visitors who had used online sources of information when planning their trip were most likely to mention Google (76%). Specific golf course websites are the most important individual online source used by almost half (47%) of visitors. VisitScotland and traveller review sites were also mentioned by almost one quarter (each 23%). The VisitScotland website was more likely to be mentioned by visitors from overseas (33%) and rest of UK (23%), than those from Scotland (3%). Usage of these sites was lower for golf visitors than typical leisure visitors to Scotland (VisitScotland - 44%, traveller review sites - 47%, transport providers sites - 21%)[4]

[4] Scotland Visitor Survey 2015

Chart 2.7: Websites used



Base (all online who used a website when planning): 265

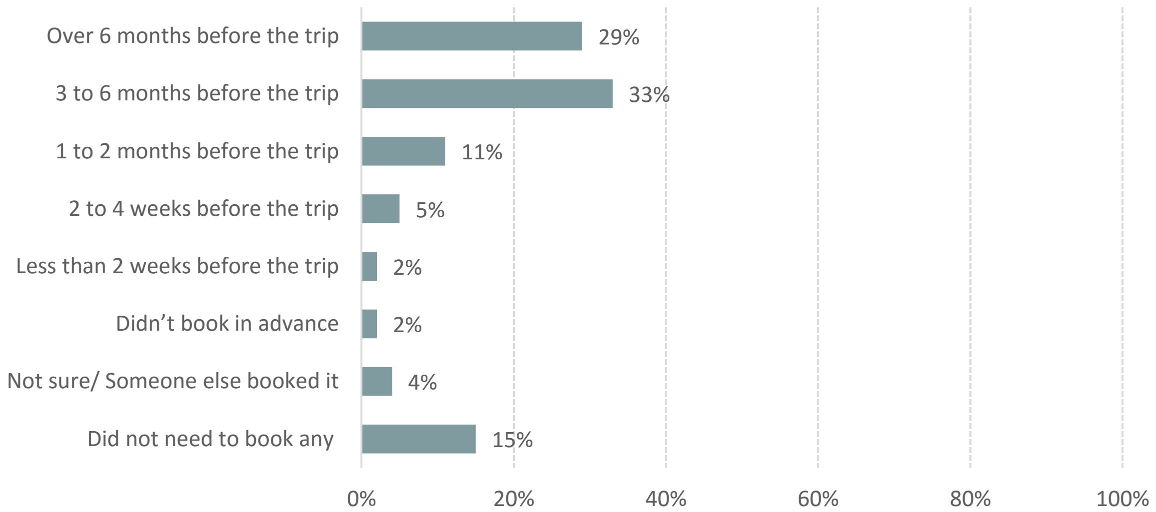
Google was cited by around three quarters of respondents, regardless of origin. Other online options are more often used by visitors from the rest of UK and overseas than by Scotland visitors. This is particularly true of golf course websites, VisitScotland.com, traveller review websites and transport provider websites.

2.2 Booking

<u>*2.2.1 Lead times*</u>

Almost two-thirds (62%) of the 409 respondents from outside Scotland booked their transport at least three months in advance, with 33% booking 3 to 6 months in advance and 29% booking more than 6 months in advance. Fifteen percent did not need to book any transport.

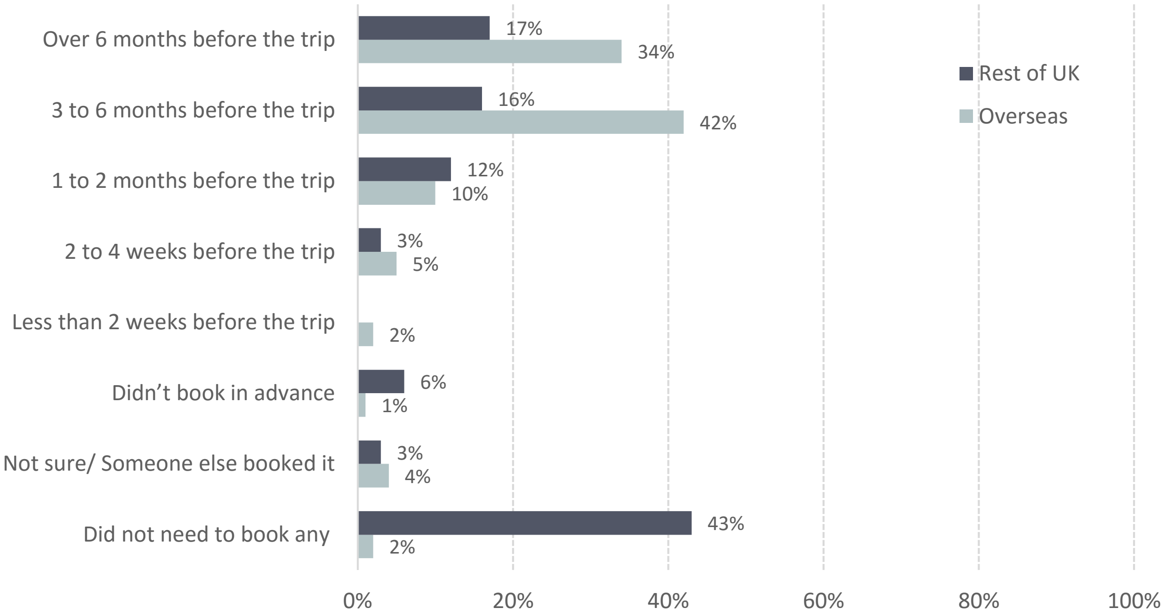
Chart 2.8: Transport booking lead-time



Base (online UK/overseas only): 409

Overseas visitors are significantly more likely to book their transport at least 3 months in advance (76%) than those from the rest of UK (33%). Almost half of visitors from the rest of UK (49%) reported that they did not need to book or did not book in advance. This finding is due to the fact that many visitors from the rest of the UK travelled by private car.

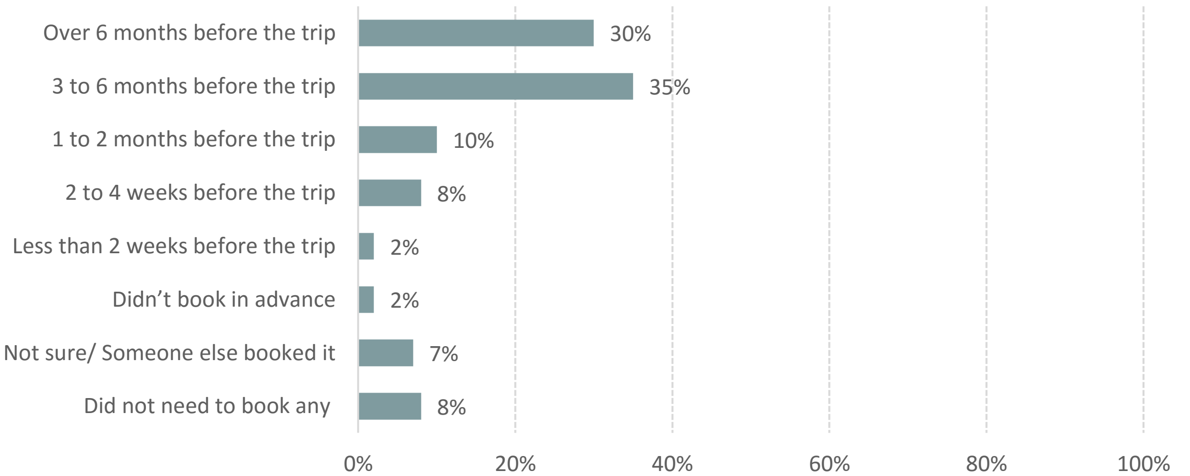
Chart 2.9: Transport booking lead-time by origin



Base (Online UK/overseas only): Rest of UK 104, Overseas 305

All overnight visitors were asked how far in advance they booked their accommodation. Accommodation is also usually booked at least three months in advance of the trip - 65% of visitors say they did this, with only 8% saying they did not need to book any accommodation. Again, there was an approximately equal split between those booking 3 to 6 months in advance (35%) and those booking more than 6 months in advance (30%).

Chart 2.10: Accommodation booking lead-time

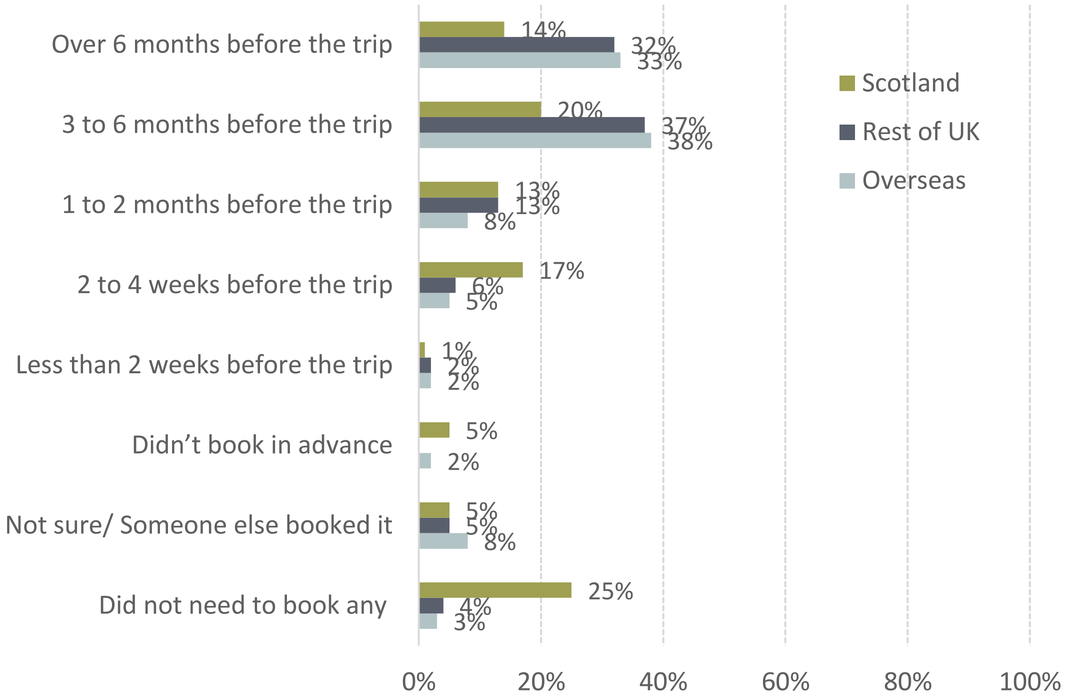


Base (online overnight only): 455

Accommodation was most likely to be booked at least 3 months in advance by visitors from overseas (71%). This was higher for those visiting from North America (76%) compared to visitors from Europe

(60%). This was also the case for those from the rest of the UK (69%). Overnight visitors from Scotland (25%) were more likely than other overnight visitors (rest of UK 4%; overseas 3%) not to book any accommodation (due to higher proportions staying with friends or in a second home).

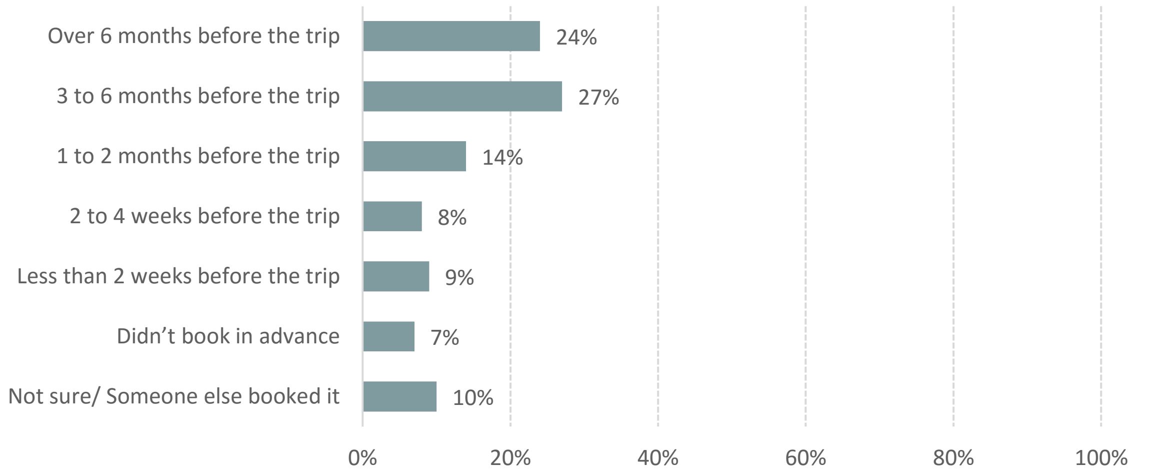
Chart 2.11: Accommodation booking lead-time by origin



Base (all online overnight): Scotland 57*, Rest of UK 98, Overseas 300
*Caution: small base size

Around half of all visitors booked their golf at least 3 months in advance, with more overnight visitors booking golf in advance (61% at least 3 months in advance) than day-trippers do (28% at least 3 months in advance). Almost a quarter (24%) of day-trippers booked their golf within 2 weeks of their trip.

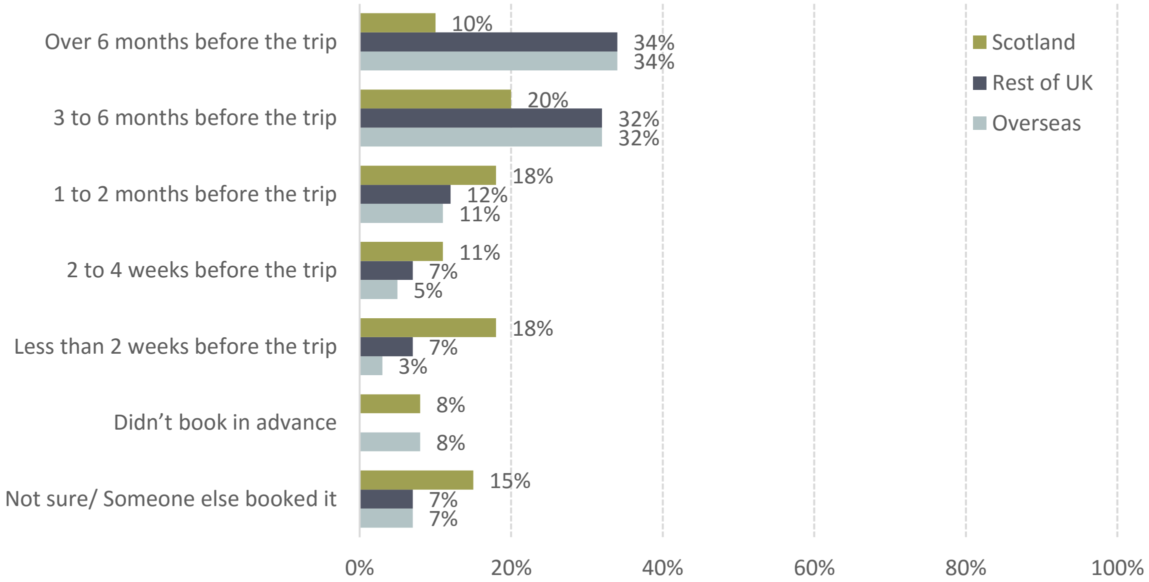
Chart 2.12: Golf booking lead-time



Base (all online): 597

Visitors from outside Scotland were significantly more likely to have booked their golf 3 to 6 months in advance; two-thirds (66%) of visitors from the rest of UK and overseas had booked golf at least three months in advance, compared to just 30% of visitors from Scotland. There was also a tendency for visitors playing tier 1 and 2 courses to book well ahead of the trip; 54% and 53% respectively had booked their golf at least three months in advance. Visitors from Scotland tended to book their golf closer to the time of their trip and were significantly more likely than others (18% compared to 7% of visitors from the rest of the UK and 3% of those from overseas) to have booked within two weeks of their trip.

Chart 2.13: Golf booking lead-time by origin

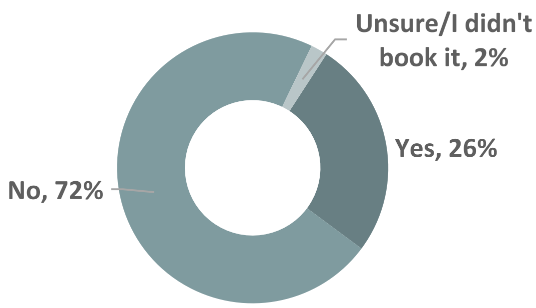


Base (all online): Scotland 175, Rest of UK 109, Overseas 313

2.2.2 Extent of package use

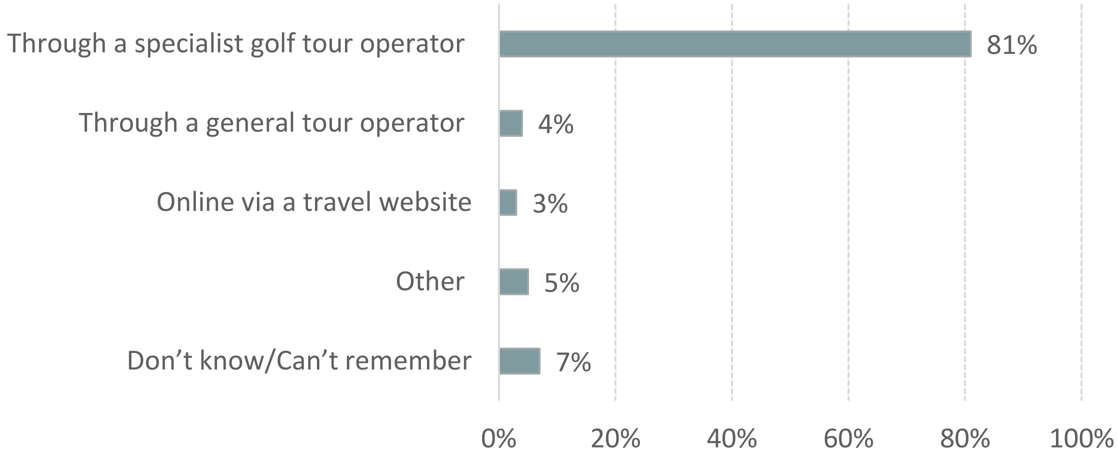
Of the 396 overnight visitors who had booked in advance, over a quarter (26%) had done so as a package, the majority (81%) of these through a specialist golf tour operator. Slightly fewer visitors from the rest of the UK had booked via a package (19%) compared to those from Scotland (26%) and from overseas (29%). North American visitors were more likely to book via a package (38%) than those from other overseas countries (16%).

Chart 2.14: Booking via a package



Base (overnight online who booked in advance): 396

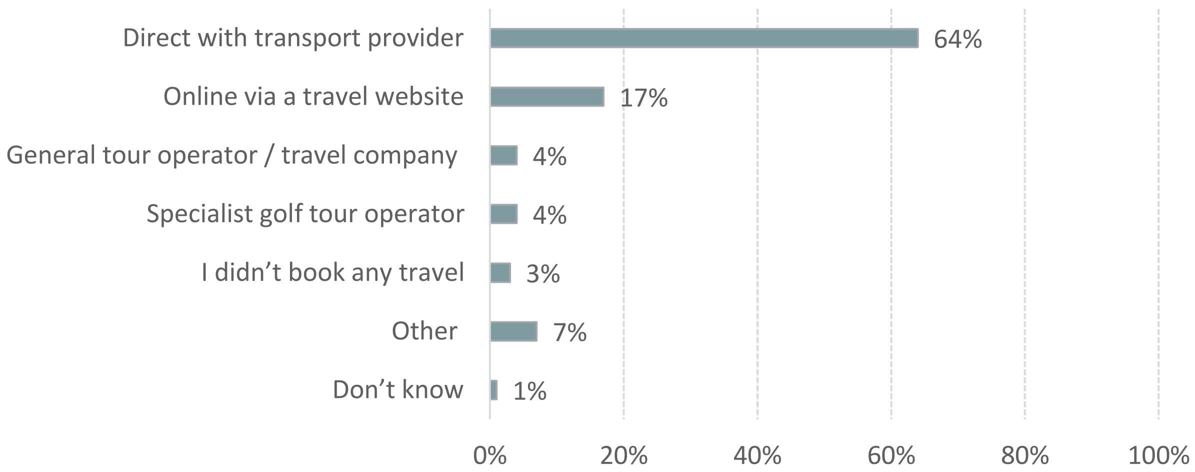
Chart 2.15: Method of booking package



Base (all who booked a package): 107

Almost two thirds of rest of UK and overseas visitors who booked their own transport booked directly with the transport provider, while 17% used an online travel website. There was very little variation in this by origin. Amongst the 7% who mentioned another method of booking, responses included, arranged everything myself, booked it myself online, hired a mini bus and hired a car.

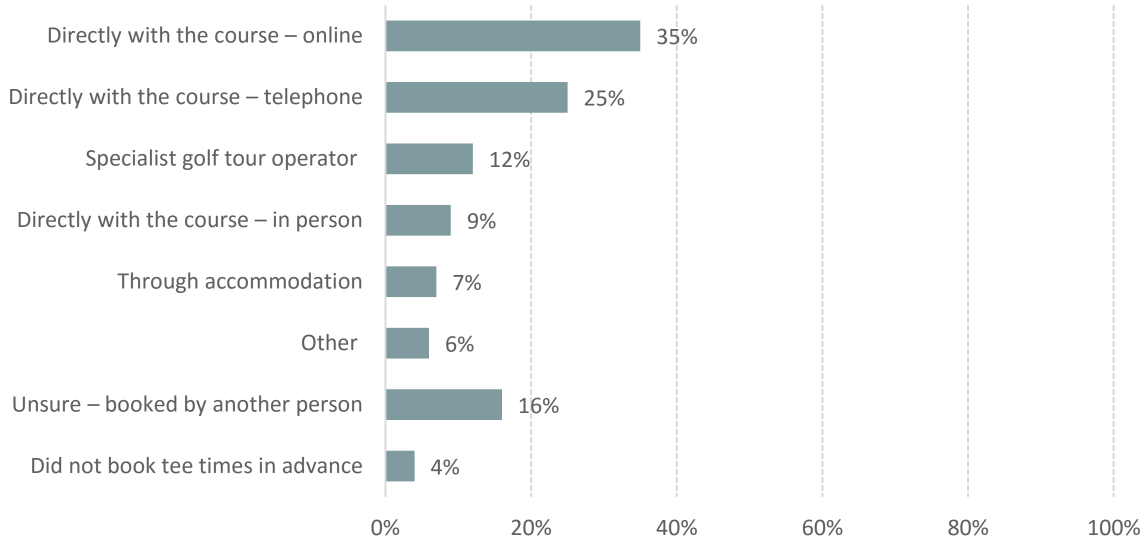
Chart 2.16: Method of booking transport



Base (all UK and overseas online who booked individually): 245

Visitors booking their own golf used a variety of methods, although online (35%) and telephone booking directly with the course (25%) were the most frequently cited. Overseas (25%) and rest of UK visitors (15%) were more likely to use a specialist golf tour operator than visitors from Scotland (4%). Day trip visitors were more likely to mention booking directly by telephone (36%) than overnight visitors (18%).

Chart 2.17: Method of booking golf



Base (all online who booked golf independently): 234

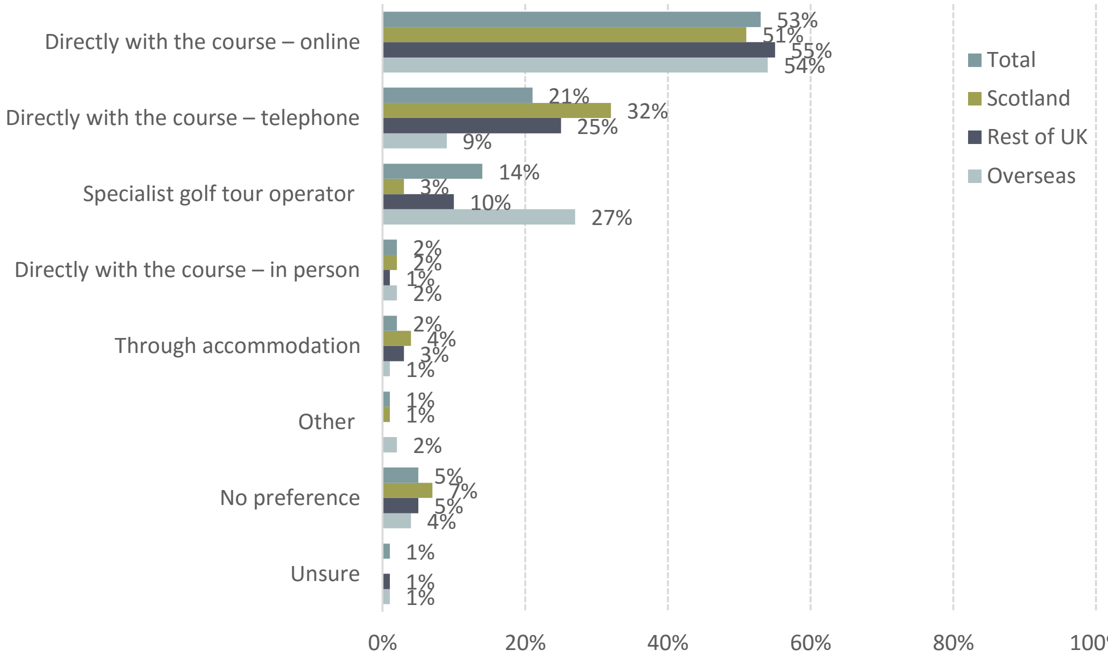
2.2.3 Preferred booking methods

When asked about their preferred method of booking their golf, 53% of the total sample stated a preference for online booking, although only 35% of those who booked independently actually booked online. Similarly, only 2% preferred to book in person, although 9% reported doing this. These findings suggest that some respondents were unable to book online, although they would have preferred to do so, perhaps due to the availability or quality of online booking facilities at some courses. Findings are shown in chart 2.18 overleaf.

Those aged 25 to 44 were more likely to prefer booking online (63%), compared to over 45s (50%). Over 45 year olds were more likely to prefer booking via a specialist golf tour operator (17%) than the younger visitors were (6%).

Overseas visitors were significantly more likely to prefer booking through golf specialists (27%) and significantly less likely to prefer telephone booking directly with the course (9%) than domestic visitors were. In particular, a higher than average proportion of North American visitors (34%) would prefer to book via a specialist golf tour operator.

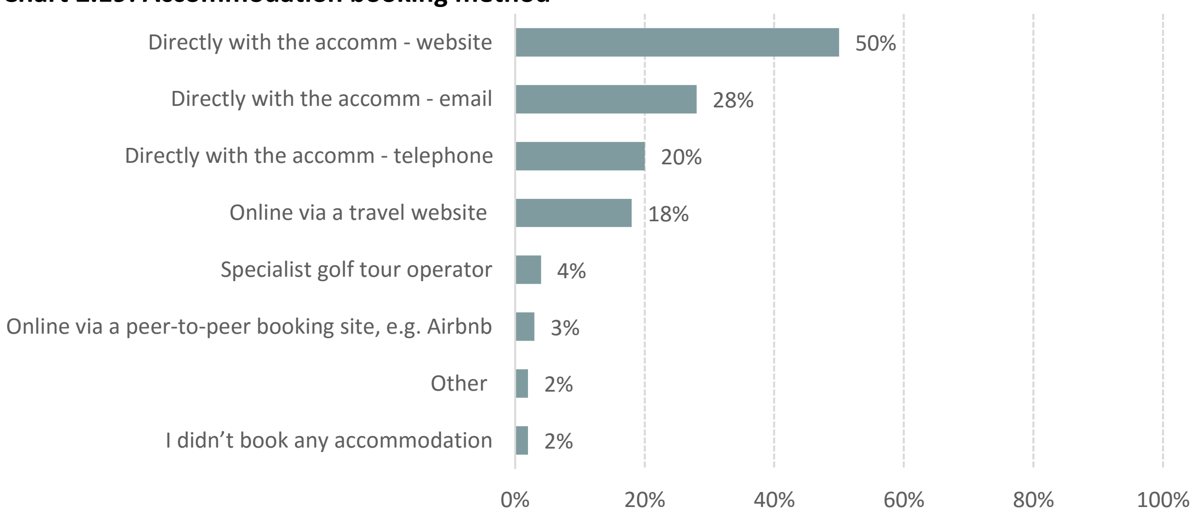
Chart 2.18: Golf booking method preference



Base (all online) 597: Scotland 175; Rest of UK 109; Overseas 313

The majority of overnight visitors booked their accommodation online (50% via the accommodation website and 28% with the accommodation by email), with overseas visitors more likely to book via the accommodation website (60%) than visitors from Scotland (25%) or those visiting from the rest of the UK (44%). Overnight visitors from Scotland (49%) were more likely than those from the rest of the UK (18%) or overseas (14%) to book by telephone.

Chart 2.19: Accommodation booking method



Base (online overnight who booked accommodation): 269

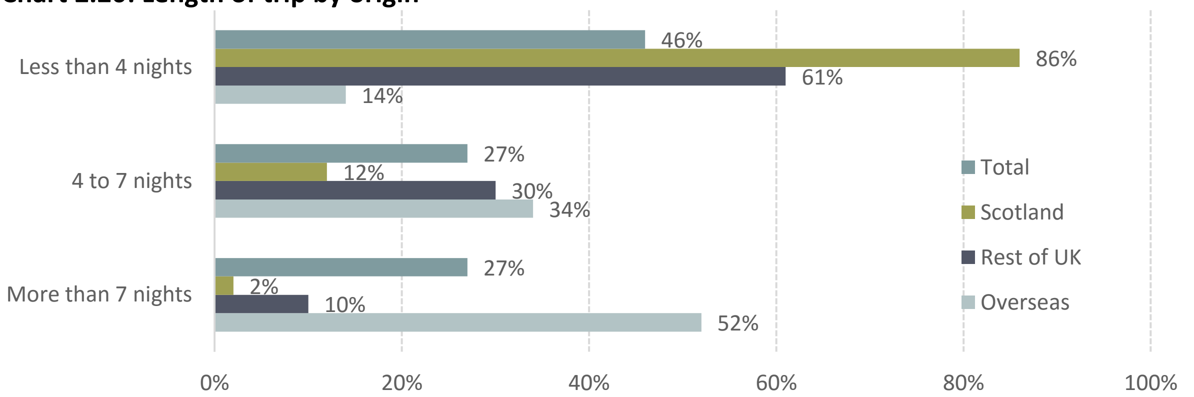
2.3 Trip Characteristics

2.3.1 Length and nature of trip

Across the total sample of overnight visitors, 46% reported being on a short break of less than 4 nights, 27% were on a trip of 4 to 7 nights, and 27% were on a holiday for more than 7 nights. There was some considerable variance in these findings depending on the origin of the visitor. The majority of visitors from Scotland (86%) and the rest of the UK (61%) were on a short break of less than 4 nights. The largest proportion of overseas visitors (52%), on the other hand, reported that they were on a trip of more than 7 nights, while a further 34% were on a short break of 4 to 7 nights. The overall average length of stay was 2.65 nights for Scotland overnight visitors, 4.96 nights for rest of UK visitors and 10.21 nights for overseas visitors.

North American visitors were the most likely to be visiting for longer breaks of more than 7 nights; almost two thirds (63%) stated their trip was for more than 7 nights, with 52% staying for 8 to 14 nights and 10% staying for more than 14 nights. Europeans enjoy a mix of trips, with a slight skew towards shorter breaks (less than 4 nights - 32%; 4 to 7 nights – 45%; more than 7 nights - 23%).

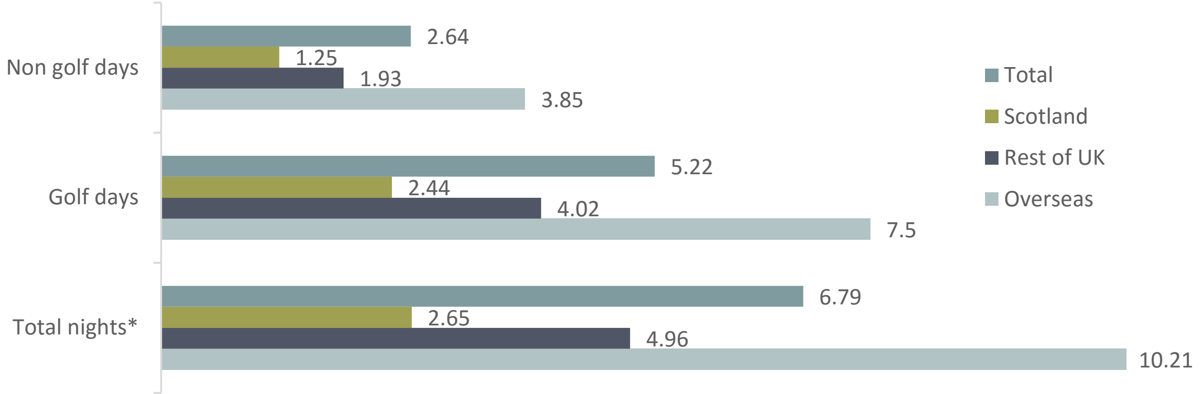
Chart 2.20: Length of trip by origin



Base (all F2F overnight): total 1,155, Scotland 212; Rest of UK 295; overseas 648

Of the sample of overnight visitors as a whole, 70% included a non-golf day in their trip. This proportion was higher for overseas visitors (81%) than for Scotland visitors (56%) or those from the rest of UK (66%). Those from North America were the most likely (82%) followed by visitors from Europe (75%) to opt for a non-golf day. Reflecting the longer length of trip, the average number of non-golf days for overseas visitors was 3.85, considerably higher than for visitors from the rest of the UK (1.93 days) or from Scotland (1.25 days). Again, those visiting from North America, on average, had a higher number of non-golf days (3.66 days) followed by visitors from Europe (2.72 days).

Chart 2.21: Overnight visitors - golf and non-golf days



Base (all F2F overnight): total 1,155, Scotland 212; Rest of UK 295; overseas 648
*The sum of golf and non-golf days may exceed total nights as visitors could have two golf days but have stayed for only one night

As we might expect, the number of golf days for visitors who were on a trip where golf was not their main purpose (4.40 days) was lower than those who had organised the trip purposely to play golf (5.43 days). Similarly, visitors who stated that golf was not the main purpose of their trip tended to be on a longer trip (8.17 nights) and have more non-golf days (4.37 days) than those who purposely came to play golf (2.18 days).

The number of rounds of golf played reflects the length of trip data. The average number of rounds played across the sample as a whole was 3.75 (5.16 for overnight visitors and 1.14 for day-trippers). Visitors from Scotland (whose trips are shorter) play the lowest number of rounds (1.63 rounds for all Scotland visitors; 2.59 for overnight visitors; 1.12 for day-trippers). Overseas visitors played an average of 7.10 rounds, with visitors from North America playing more rounds (7.80) than those from Europe (4.94).

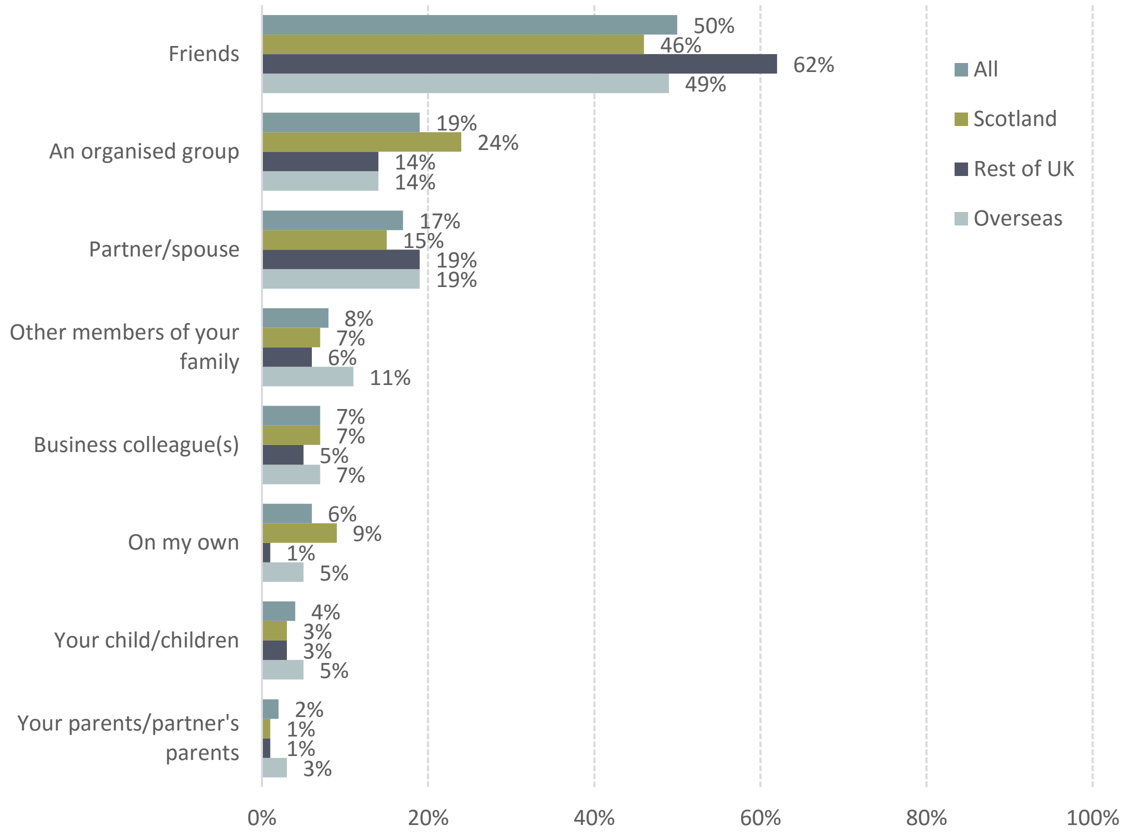
On average, 18 to 24 year olds played the least number of rounds of golf (3.16). The older the golfer the more rounds of golf they were likely to play, with 65+ year olds having played the most rounds of golf (4.16).

2.3.2 Group composition

Most commonly, visiting parties consisted of friendship groups (50% of the total sample). This was true across all markets, though a significantly higher proportion (62%) of visitors from the rest of the UK described their group this way than did visitors from Scotland (46%) or overseas (49%). Over a quarter of visitors were with at least one member of their family (27%).

Visitors from Scotland were significantly more likely to be part of an organised group (24%) or on their own (9%), compared to visitors from the rest of UK (14% and 1% respectively) or overseas (14% and 5% respectively). Visitors from overseas were more likely to be with other members of their family (11%) than those from Scotland (7%) or the rest of the UK (6%). Visitors on a day trip were more likely than overnight visitors to be on their own (12%), with an organised group (26%), or with business colleagues (10%). Older golfers (65+) were more likely to visit with their partner or spouse (24%) than any other age groups.

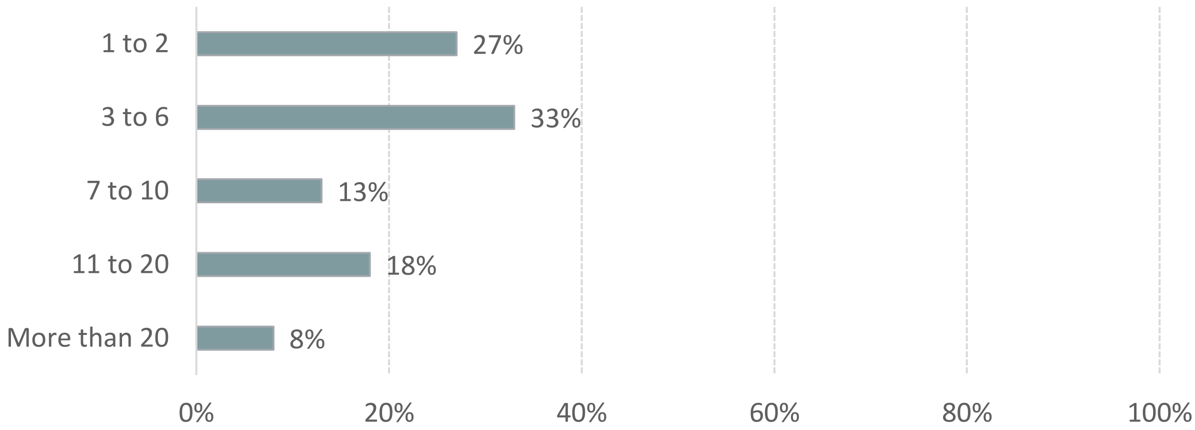
Chart 2.22: Group composition by origin



Base (all f2f): 1745, Scotland 746, Rest of UK 326, Overseas 673

The majority of visitors (73%) were in small groups of 10 or less people, while 26% were in larger groups of more than ten. Overall, the average number of people in the party was 8.37, with 7.34 people playing golf and 1.03 people not playing golf. In total, 28% of respondents reported that there was someone not playing golf in their group. Visitors from Scotland were the most likely to include non-golfers in their group (34%) and those from Europe were the least likely (16%). Visitors from the rest of the UK (27%) and North America (28%) were equally likely to have non-golfers in their party.

Chart 2.23: Number of people in the group

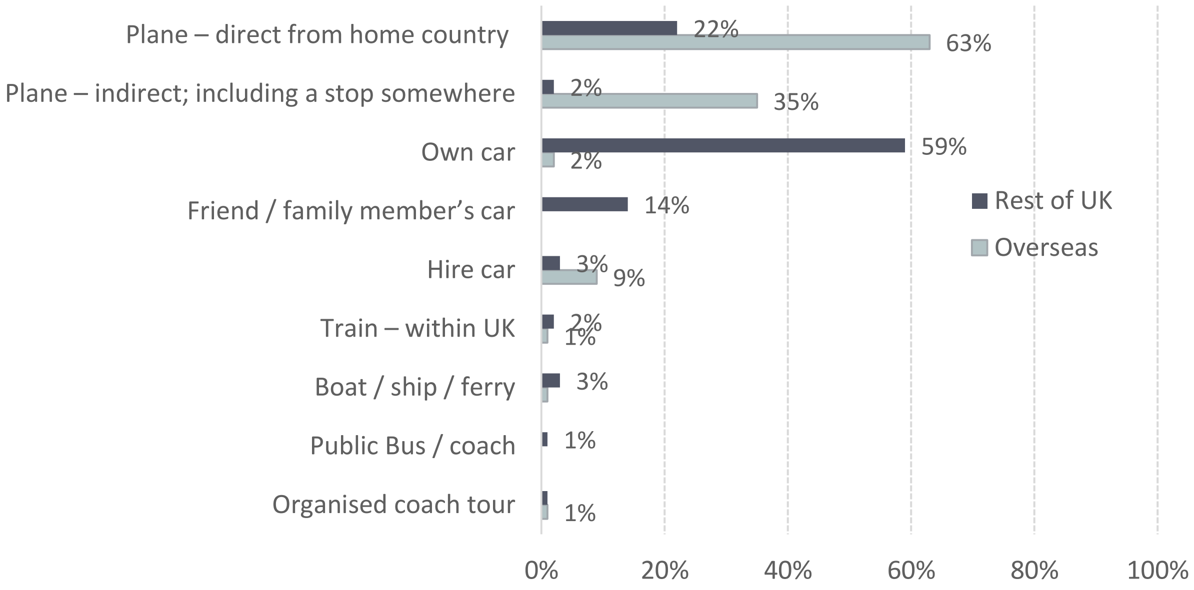


Base (all f2f): 1745

2.3.3 Travel

As we would expect, air travel dominates as the mode of transport used to get to Scotland for overseas visitors. Visitors from Europe (78%) were more likely to take a direct flight than those from North America (61%). Visitors from North America were more likely to take an indirect flight (39%) than those from Europe (18%). The majority of visitors from the rest of the UK travelled to Scotland by car, though a quarter (24%) travelled by plane.

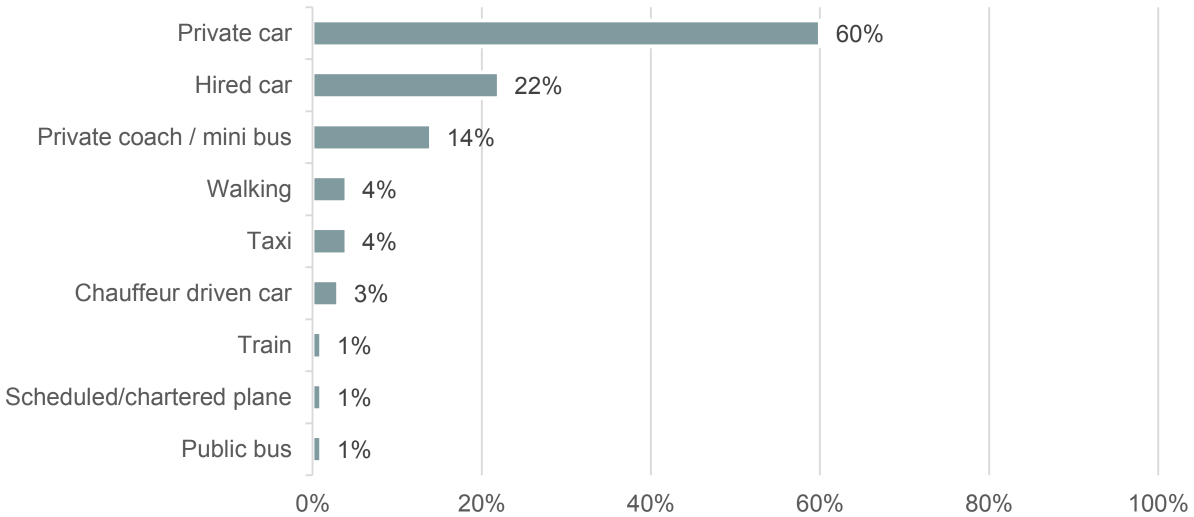
Chart 2.24: Transport used to get to Scotland



Base (f2f UK and overseas): Rest of UK 269, Overseas 435

Transport used to get to the golf course was most commonly car, with private car use particularly high amongst visitors from Scotland (93%) and other UK visitors (61%). A hired car was used by 43% of overseas visitors. Both rest of UK (17%) and overseas visitors (22%) were more likely to use a private coach or mini bus than Scotland residents (4%).

Chart 2.25: Transport used to get to course

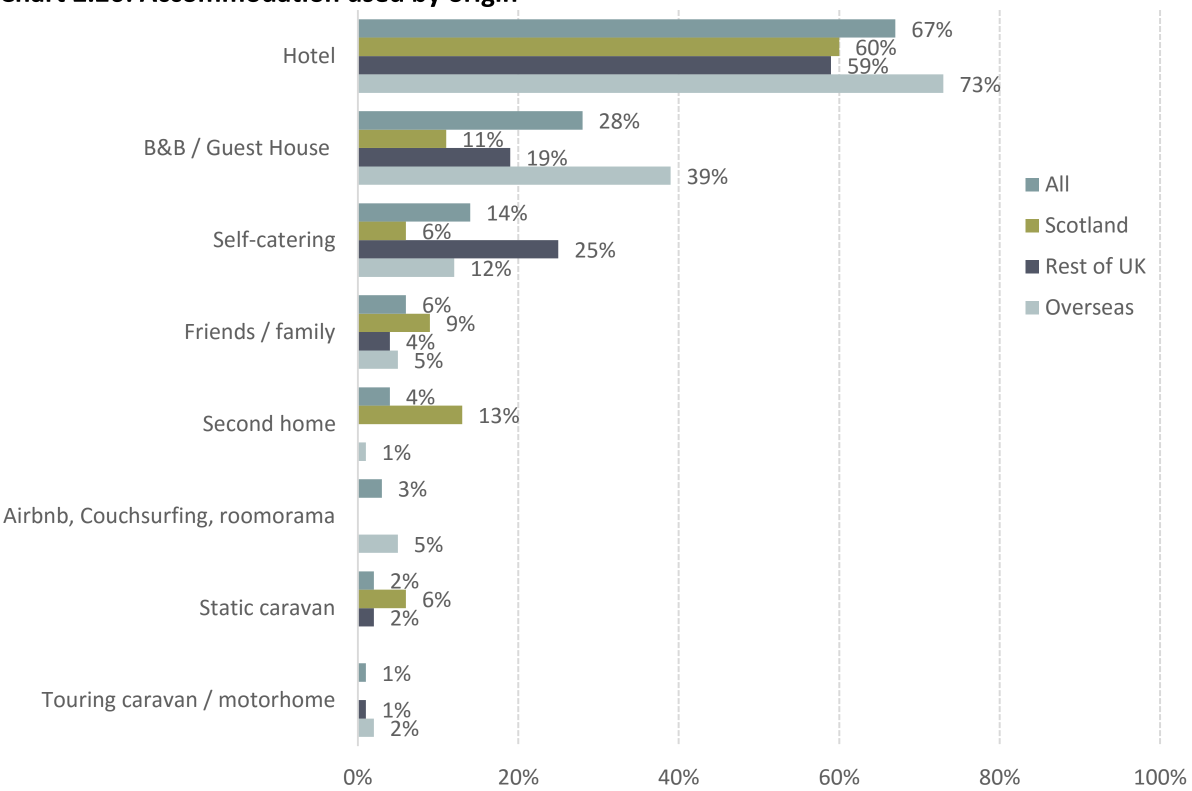


Base (all online): 597

2.3.4 Accommodation

The most frequently cited types of accommodation were hotels (67%), followed by B&Bs/guesthouses. Overseas visitors (73%) were more likely than those from Scotland (60%) or the rest of the UK (59%) to be staying in a hotel. Overseas visitors were also more likely to mention a B&B/guesthouse (39%). A higher proportion of North American visitors mentioned both hotels (78%) and B&Bs (45%) compared to European visitors (61% and 28% respectively). Overseas visitors were more likely to use top end luxury accommodation (42%) than visitors from Scotland (11%) or from other parts of the UK (21%).

Chart 2.26: Accommodation used by origin



Base (all online overnight): 462, Scotland 63*, Rest of UK 99, Overseas 300
*Caution: small base size

2.3.5 Activities

The findings suggest that, in addition to golf, other activities are an important part of the trip for overnight visitors. Indeed, the majority of overnight visitors participated in at least some activities, with walking, sightseeing and shopping the most popular. It is interesting to note that four fifths visited an attraction and almost one third attended an event. The key activities undertaken by overnight visitors are listed below, whilst a full list can be found in the appendices.

Types of activities undertaken by overnight golf visitors:

- 89% participated in an activity, such as walking, shopping or visiting a beach
- 80% visited an attraction, such as historic houses, castles, cities and churches
- 31% attended an event, such as golf events, traditional music events and concerts

Base (online F2F respondents only): 92

The most frequently cited individual activities were:

- Walking – short walks (68%), centre based walks (35%) and long walks (28%)
- Sightseeing by car, coach or on foot (58%)
- Shopping (45%)
- Visiting historic houses, stately homes and castles (37%)
- Visiting a beach (30%)
- Visiting cities (28%)
- Visiting a cathedral or church (24%)
- Visiting a country park or garden (23%)
- Looking at architecture and buildings (22%)

Base (online F2F respondents only): 92

Base sizes are too low for accurate analysis by sub-groups such as origin.

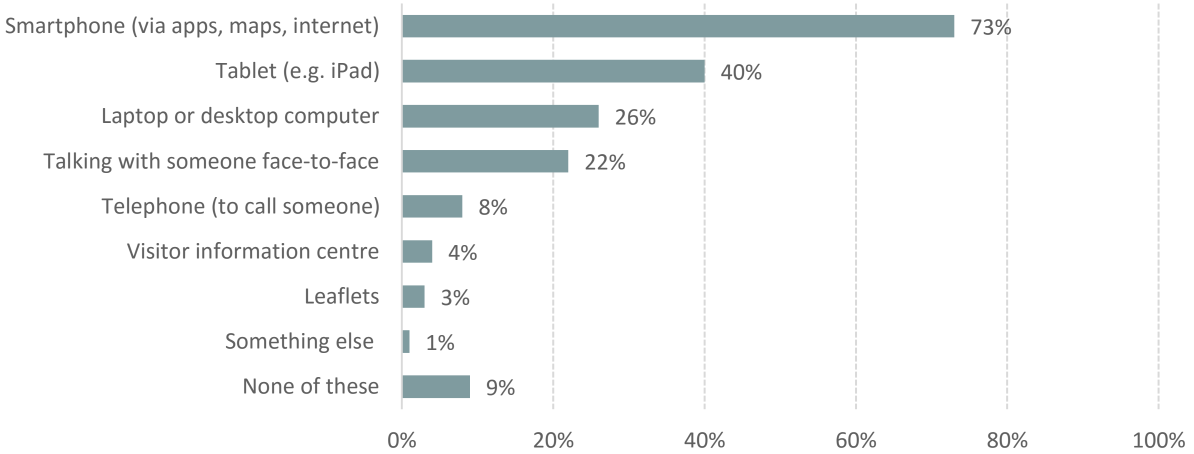
Respondents were also asked if they had ever attended a golfing event in Scotland, such as the Ryder Cup or the Open Championship. As we might expect, domestic visitors are more likely to have attended a golfing event in Scotland than overseas visitors. In total, 87% of visitors from Scotland and almost half (47%) of visitors from the rest of the UK had been to a golfing event in Scotland, compared to 22% of overseas visitors.

When asked if they had also played golf on their trip to attend the golfing event, almost half (45%) reported that they had. This proportion was significantly higher for overseas visitors (82% of those who had attended an event in Scotland) than rest of UK (54%) or Scotland (32%) visitors. Please note the sample sizes of those who attended a golf event are particularly low when analysed by origin.

2.3.6 Sources of information during visit

A variety of information sources were used during golf visits to Scotland. The majority of overnight visitors used mobile devices, such as smartphones (73%) and tablets (40%) during their trip. Smartphones were more often used by visitors from the rest of UK (78%) and overseas (81%) than by visitors from Scotland (44%). Visitors from Scotland were the most likely to state 'none of these' (28%). Findings tended to be consistent between North American and European visitors.

Chart 2.27: Information sources used during trip



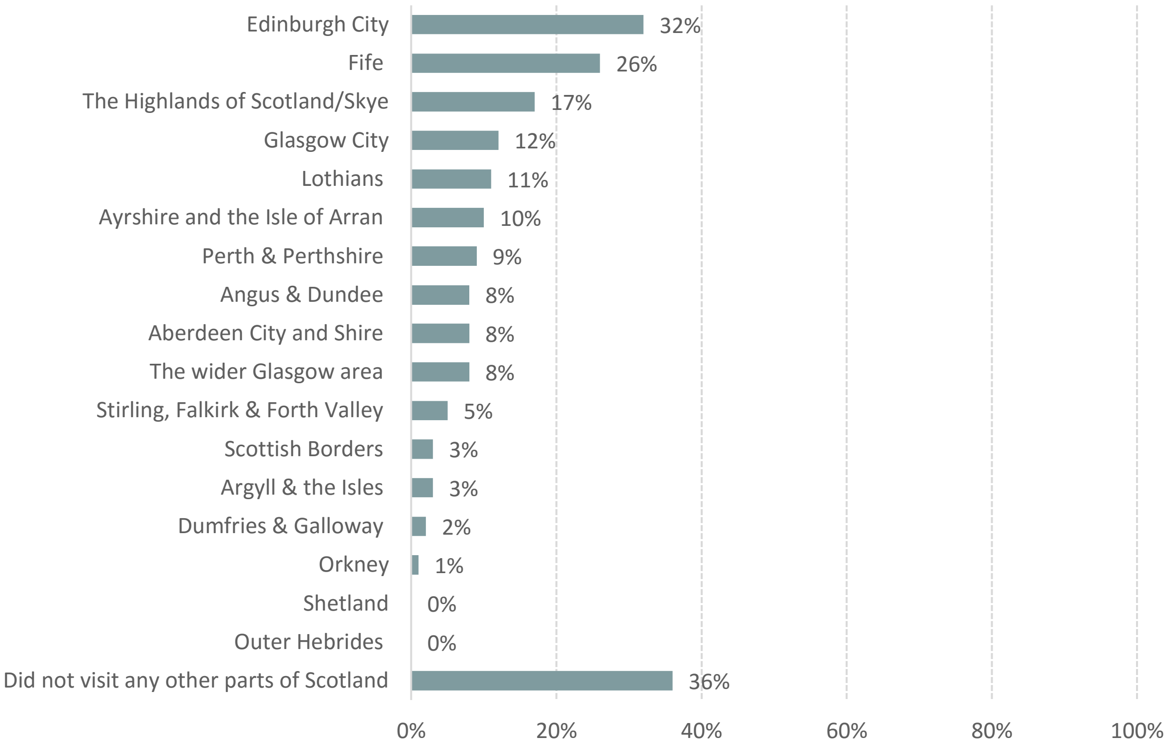
Base (all online overnight): 455

2.3.7 Areas of Scotland visited

In total 64% of overnight visitors reported visiting another part of Scotland during their trip. Overseas visitors were the most likely to visit another part of Scotland, with over four fifths (83%) reporting that they had visited another area, compared to almost half (48%) of rest of UK visitors and 29% of Scotland visitors. Amongst overseas visitors, those from North America (91%) were more likely than visitors from Europe (63%) to have visited another part of Scotland perhaps reflecting the longer average length of trip for North Americans. Indeed, the longer visitors stayed in Scotland the more likely they were to visit other areas; amongst visitors staying more than a week, 92% stated they visited another part of Scotland.

The most frequently cited other locations visited were Edinburgh (32%) and Fife (26%). Visitors from North America were the most likely to visit various parts of Scotland, including Edinburgh (51%), Fife (47%), the Highlands (30%), the Lothians (21%), Ayrshire (19%) and Glasgow (19%).

Chart 2.28: Other areas visited



Base (all online overnight): 448

2.4 Visitor Journey – Summary of Key Findings

2.4.1 Planning

The planning of golf trips to Scotland tend to start more than 6 months before the trip takes place; 56% of all overnight visitors planned their trip more than 6 months in advance, with a higher proportion of overseas visitors (67%) planning more than 6 months ahead.

The key motivations to visit Scotland to play golf are its reputation as a golfing destination, an ambition to play golf in Scotland, and/or a previous positive experience of golfing in Scotland. Around two thirds of visitors stated golfing events influenced their decision to visit Scotland. Golfing events were more motivating for overseas visitors than for those from the rest of the UK.

A range of factors influenced Scotland visitors' decisions to choose a specific region, but the course itself was the most important motivator, especially if the course is connected to a major event.

Talking with family/friends and websites (course websites, VisitScotland and traveler review sites) are key sources of information during the planning stage. Overseas visitors were more likely to consult multiple sources than visitors from Scotland or the rest of the UK.

2.4.2 Booking

Although the planning of a trip to Scotland to play golf tends to start more than 6 months before, accommodation and travel booking usually takes place 3 to 6 months or more than 6 months before travel.

Just over one quarter of overnight visitors (26%) booked a package tour – most commonly via a specialist golf tour operator. Those who booked independently tend to use online (35%) or telephone (25%) for booking golf directly with the course. However, the largest proportion (53%) of total sample reported that, given the choice, they would prefer to book online. This may indicate that some courses are not providing an online booking option and that provision of this would be appreciated by visitors.

2.4.3 Trip Characteristics

Whilst the profile of golf visitors was relatively consistent across markets, there were notable differences in the types of trip taken. The key characteristics of the types of golf trip taken by visitors from Scotland, the rest of the UK and overseas are summarised below.

Visitors from Scotland

- Amongst visitors from Scotland, 2/3 are day visitors and 1/3 are on an overnight trip
- Scotland overnight visitors tend to be on a short break and were less likely to include a non-golf day than those from rest of UK or overseas
- The average number of rounds of golf for overnight visitors was 2.6 rounds
- Most visitors from Scotland were on a trip with friends or an organised group, and stayed in mid-market hotels

Visitors from the rest of the UK

- Visitors from other parts of the UK also tend to be on a short break of less than 4 nights, and play an average of 4 rounds.
- However, two thirds of these visitors included a non-golf day and around half visited another part of Scotland.
- Most travelled with friends and stayed in mid-market hotels or self-catering.

Visitors from overseas

- North American visitors reported the longest trips, typically 1 to 2 weeks (average 10.3 days)
- North Americans also play the most golf, playing an average of 8 rounds during their trip
- Europeans reported a mix of trips, both short breaks and longer holidays. These visitors average 5 rounds of golf per trip.
- The majority of all overseas visitors included non-golf days and most visited another part of Scotland.
- North Americans (45%) and Europeans (39%) were the most likely to stay in luxury accommodation and to play Tier 1 courses (66% and 47% respectively).

3. Visitor Experience

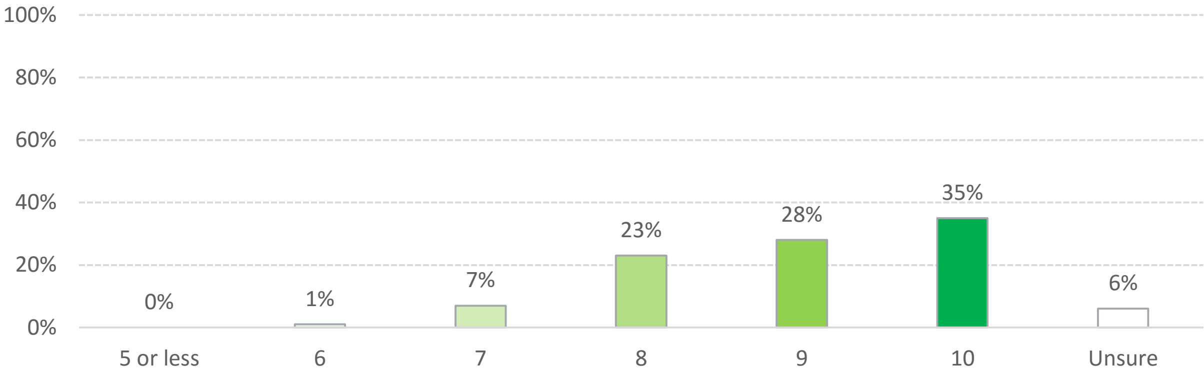
Respondents were asked a series of questions relating to their experience in order to evaluate the quality of service provision for golf visitors to Scotland. Evaluation questions covered golf experience, whole trip experience, accommodation and digital coverage, as well as various individual aspects of their trip such as transport, customer service and value for money.

3.1 Evaluation of Golf Experience

During the face-to-face interviews respondents were asked to rate the quality of the golf experience on that day. The vast majority of golfers were happy with their golfing experience; 86% rated it with a score of 8 to 10 out of 10. Those most likely to provide a score of 10/10 were:

- North Americans (45%)
- Those who played a Tier 1 course (48%)
- Where golf was not their main purpose of trip (49%)
- Social class AB (39%)

Chart 3.1 Rating of golf experience

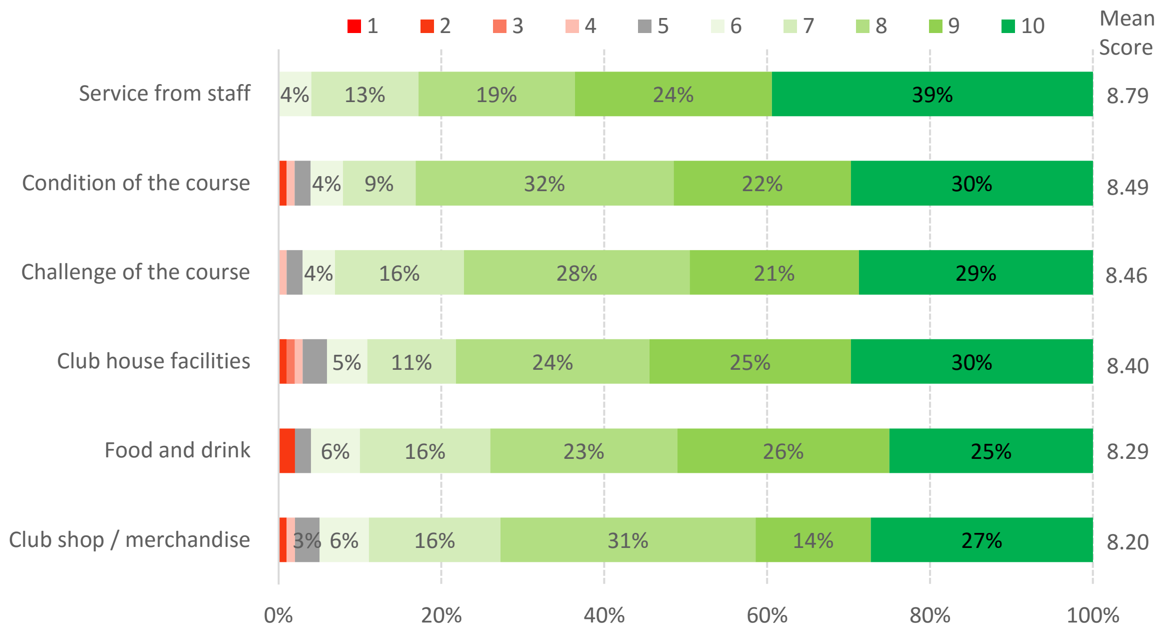


Base (f2f only): 1412

All aspects of the course were rated positively; the majority of visitors scored each with 8, 9 or 10 out of 10. Staff received the highest praise (mean score 8.79), followed by the condition of the course (8.49) and the challenge of the course (8.46). Aspects of the clubhouse were also highly regarded: facilities (8.40), food and drink (8.29), club shop (8.20).

Visitors from overseas were more likely to rate the challenge and condition of the course 9 or 10 out of 10 (65% and 64% respectively) than those from elsewhere. The service from staff was rated highest (9 or 10) by visitors from the rest of the UK (75%).

Chart 3.2: Rating of aspects of golf course



Base (online f2f only): 223 - 249

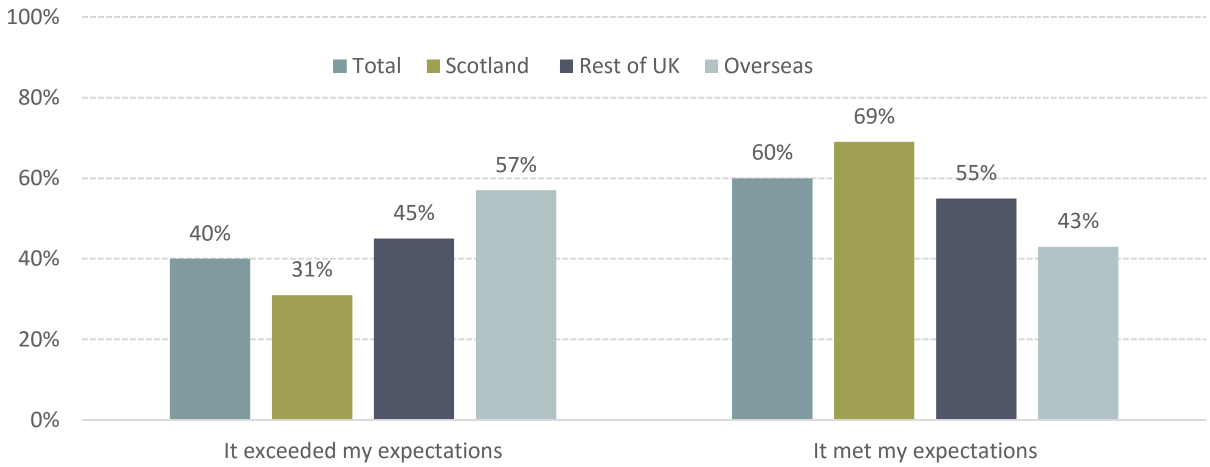
Respondents were also asked if they would like to suggest any improvements to the golf course that they played. In total, just over one in five (22%) suggested an improvement, however, there was not any one improvement that was mentioned by a large proportion of respondents. Improvements mentioned more than once tended to relate to improvement/maintenance of the course (e.g. cut greens, general maintenance, bunkers, rough, etc.) and providing a refreshment service.

Table 3.1 Suggested improvements to make visit to course better

Suggestion	
Cut green - too slow	2%
Halfway house for refreshments	2%
Better general maintenance	2%
More affordable	1%
Buggies	1%
Better condition of bunkers	1%
Slow Players/Marshalls for slow play	1%
Cut the rough	1%
Improve Fairway/layout	1%
Better hospitality	1%
Better signage/markers	1%
Playing better/winning	1%
More/ better parking	1%
Caddies	1%
Driving range	1%
Other specific comments	2%
Don’t know/Unsure	6%
Nothing	72%
Base (all F2F)	**1,412**

Across the sample, all respondents reported that their golf experience had either met (60%) or exceeded (40%) their expectations. Overseas (57%) and UK visitors (45%) were more likely to state that the golfing experience had exceeded their expectations than were Scotland visitors (31%). Overnight visitors (51%) and those who played a Tier 1 course (53%) or Tier 2 course (45%) were also more likely to state that the overall golf experience exceeded their expectations than those who were on a day trip (22%) or who had visited a Tier 3 course (19%).

Chart 3.3: Satisfaction with golf experience



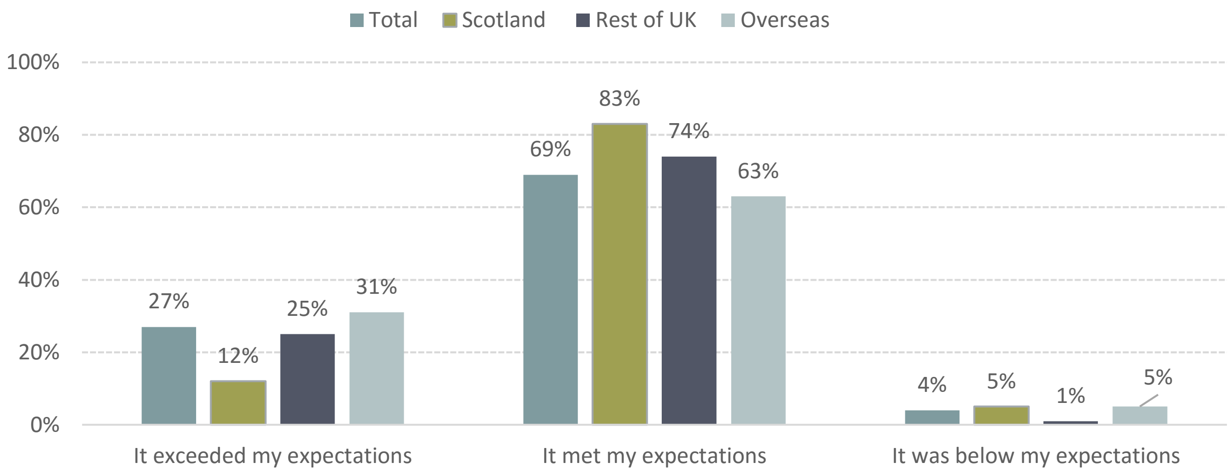
Base (f2f online only): 249, Scotland 131, Rest of UK 50*, Overseas 68*
*Caution: small base sizes

3.2 Scotland as a Golfing Destination

3.2.1 Satisfaction with Accommodation

The majority of overnight visitors (69%) reported that their accommodation met their expectations, while a further 27% stated that their accommodation has exceeded their expectations. Visitors from Scotland (12%) were less likely to state that accommodation exceeded expectations than visitors from the rest of UK (25%) or overseas (31%).

Chart 3.4: Satisfaction with accommodation



Base (online overnight): 434, Scotland 48*, Rest of UK 92, Overseas 294
*Caution: small base size

Respondents who were staying in top end or luxury accommodation were more likely to state that it exceeded their expectations (39%) than those staying in mid-market (22%) or budget accommodation (23%).

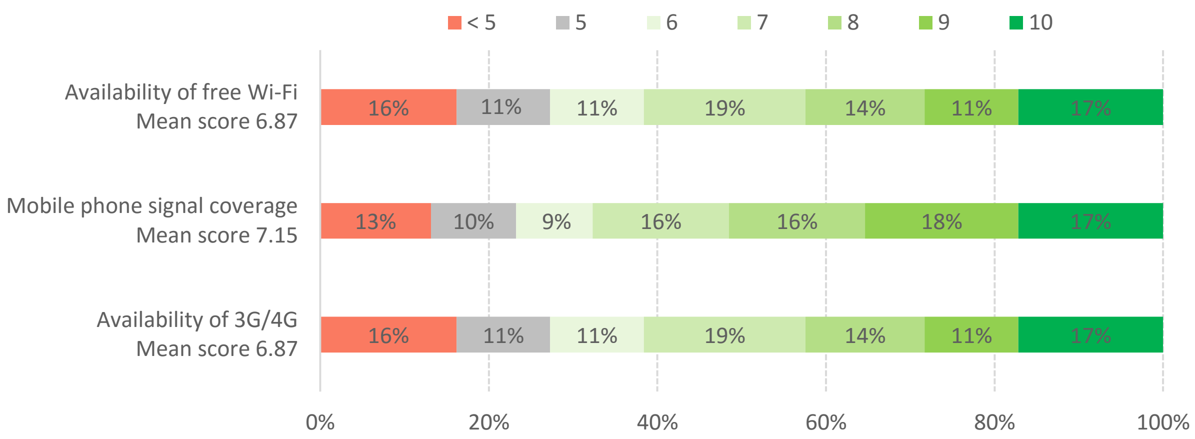
3.2.2 Digital coverage

Although most visitors were broadly happy with digital coverage, positive scoring was weaker than for other aspects of the visit and, indeed, significant minorities expressed dissatisfaction. Around two thirds of respondents rated the availability of free Wi-Fi (61%), mobile phone signal coverage (67%) and the availability of 3G/4G (61%) with a score of 7 to 10.

However, around one quarter expressed dissatisfaction with all three aspects digital coverage; 27% scored availability of 3G/4G and free Wi-Fi at 5 or less, and 23% scored 5 or lower for mobile phone coverage.

Visitors from Scotland and the rest of the UK provided lower scores for digital coverage than visitors from overseas.

Chart 3.5: Rating – digital coverage

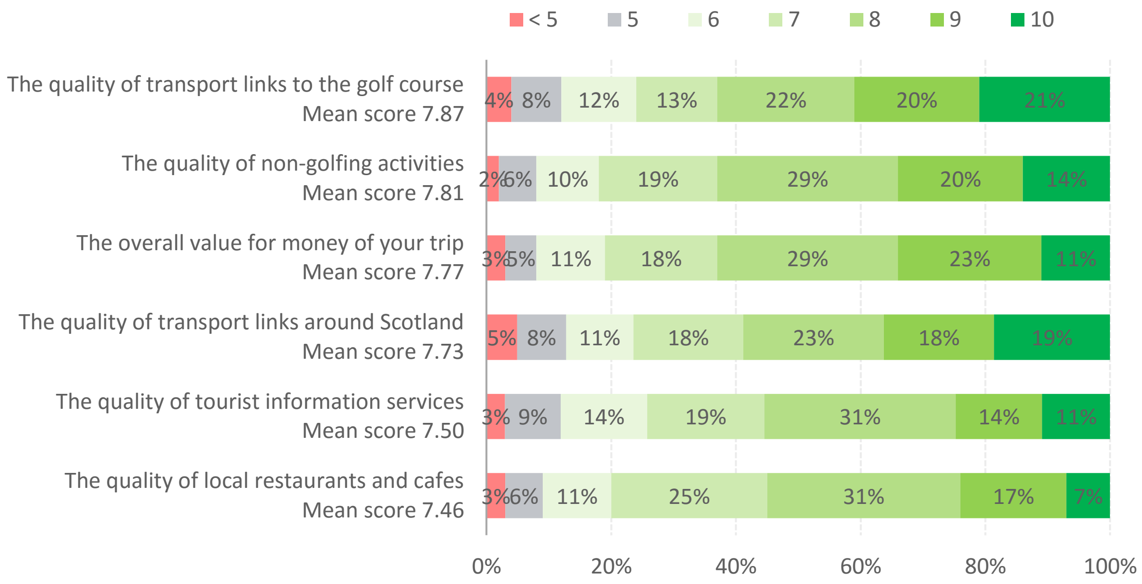


Base (all online excluding unsure): 455 - 518

3.2.3 Local services and facilities

Overnight visitors were asked to provide ratings on various local services and facilities. The majority scored all of these positively, with mean scores ranging from 7.46 to 7.87. The quality of transport links to the course and transport links around Scotland received similarly high scores; 63% and 60% respectively scored these with 8, 9 or 10 out of 10. The majority of respondents also felt positively about the quality of non-golfing activities (63% scored 8, 9, 10) and the overall value for money of the trip (63% scored 8, 9, 10). Slightly lower proportions provided scores of 8 or more for the quality of tourist information services (56%) and the quality of local restaurants and cafes (55%), however, the majority remain happy with these services.

Chart 3.6: Rating – local services and facilities



Base (all online overnight, excluding don't know): 228 - 416

3.2.4 Evaluation of Experience in Scotland Overall

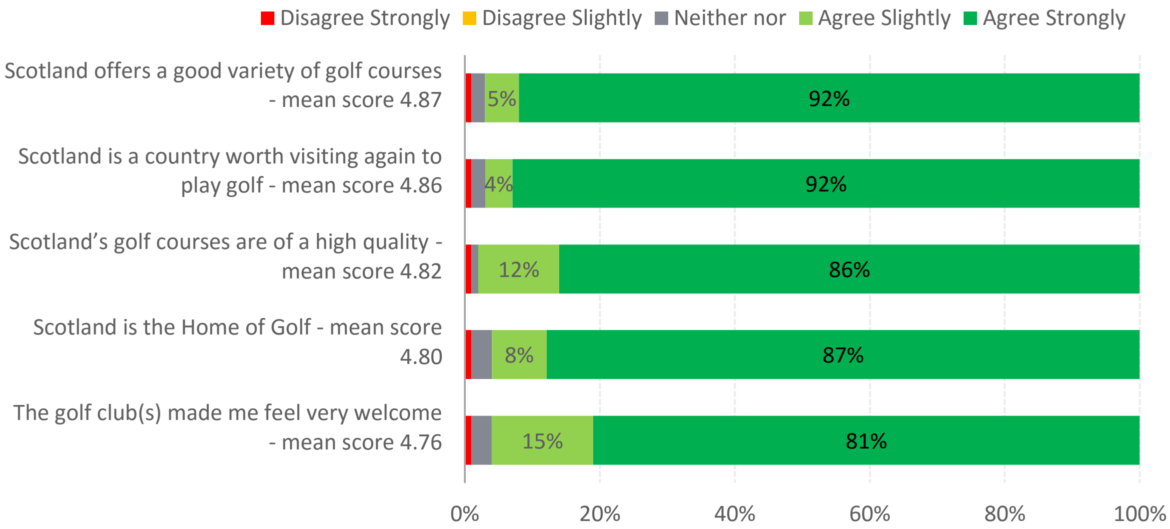
Respondents were presented with a series of statements about their experience in Scotland overall and asked the extent to which they agreed or disagreed with each. The data from this question are detailed in charts 3.7 and 3.8 below.

The majority of visitors agreed strongly with the statements relating specifically to aspects of the golf experience, indicating that Scotland is viewed as a top class golfing destination offering both variety and quality in its courses. More specifically, 92% agreed strongly that Scotland offers a good variety of golf courses and is a country worth visiting again to play golf. Furthermore, 86% of respondents strongly agreed that Scotland's golf courses are of high quality and 81% strongly agreed that the courses made them feel welcome.

The proposition that Scotland is 'the Home of Golf' was found to resonate with almost all respondents; 87% agreed strongly and 8% agreed slightly with this statement. Those from overseas (90%), in particular North America (95%), were more likely to agree strongly that Scotland is the Home of Golf, than those from Scotland (86%) or the rest of the UK (81%).

Visitors from Scotland were more likely to agree strongly that it offers a good variety of courses (98%) than visitors from the rest of the UK (90%) or overseas (87%). Almost all respondents visiting from the rest of the UK (98%) agreed strongly that Scotland is a country worth visiting again to play golf.

Chart 3.7: Rating of Scotland as a destination – highest rated aspects

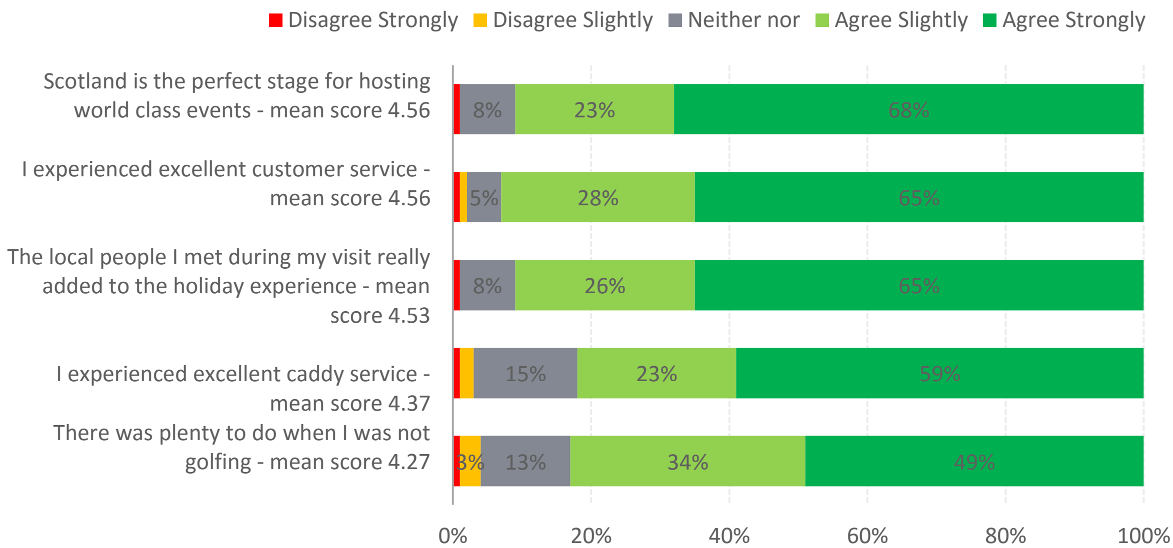


Base (all online, excluding n/a): 244 - 582

Whilst the majority of overnight visitors expressed agreement with the statements relating to more general aspects of the trip (as detailed in chart 3.8 below), agreement tended to be slightly lower than for the golf specific statements. Nevertheless, the majority did agree strongly that they experienced excellent customer service (65%), the local people really added to the holiday experience (65%) and they experienced excellent caddy service (59%). Furthermore, 68% of visitors agreed strongly that Scotland is the perfect stage for hosting world class events, again confirming the high regard visitors have for Scotland as a golfing destination.

Overseas visitors, in particular North Americans, were the most likely to agree strongly that the caddy service was excellent (71%) and that the local people added to the experience (81%). Those visiting from Scotland were the most likely to agree strongly that Scotland is perfect for hosting world-class events (74%).

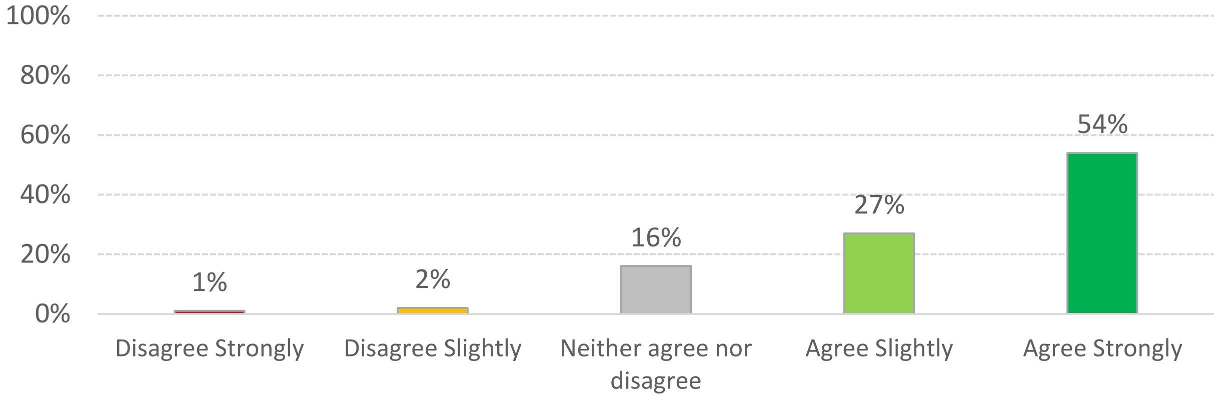
Chart 3.8: Rating of Scotland as a destination – lower rated aspects



Base (all online, excluding n/a): 244 - 582

Of all overnight visitors, 81% overall agreed their trip was one of the best golfing holidays or short breaks they had ever taken. Agreement with this statement was highest amongst overseas visitors (87%, compared to 79% of visitors from the rest of the UK and 62% of visitors from Scotland). Specifically, North American visitors were more likely to agree strongly (71%) than those from Europe (51%), the rest of UK (47%) or Scotland (33%) that this was one of the best golfing holidays or short trips they had ever had.

Chart 3.9: This was one of the best golfing holidays/short breaks I have ever taken



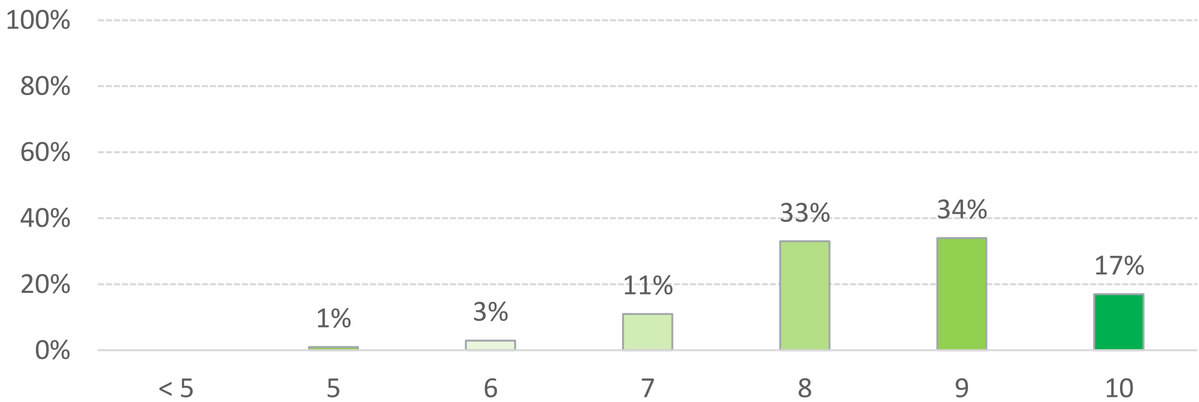
Base (online overnight): 455

All respondents, including day trip and overnight visitors, were asked to think about all aspects of their trip (not just the golf) and provide a rating of their experience. Taking everything into consideration, ratings of the overall trip were also very high; 84% of respondents rated it with a score over 8 or more. Overall ratings tended to be slightly lower than the ratings provided for the golf experience; 35% provided a score of 10/10 for the golf experience compared to 17% for the overall trip experience.

Nevertheless, the profile of those most likely to provide a score of 10/10 were similar for both the golf experience and the overall trip experience. Respondents most likely to provide a 10/10 score for the overall experience were:

- North Americans (34%)
- Overnight visitors (22%)
- Social class C2DE (29%)

Chart 3.10: Overall rating of the trip



Base (all online): 523

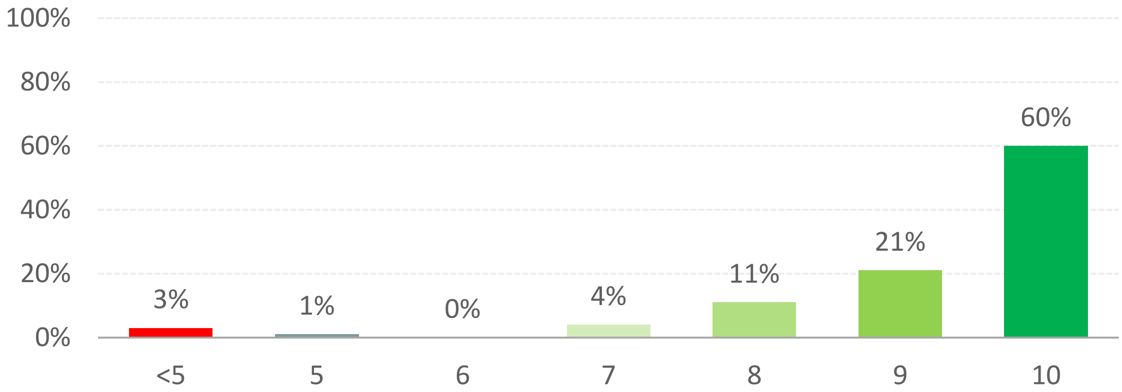
3.2.5 Likelihood to recommend

Visitors from outside of Scotland were asked to rate their propensity to recommend Scotland as a golfing destination with a score out of 10. It is a reflection of the high levels of satisfaction already noted that the majority were strongly inclined to recommend Scotland, scoring 9 (21%) or 10 (60%) out of 10.

The strong propensity to recommend Scotland was consistent across all markets, with no statistically significant differences.

- Total 9.15
- Rest of UK 8.96
- North America 9.22
- Europe 9.29

Chart 3.11: Rating of likelihood to recommend Scotland as a golfing destination



Base (online rest of UK / overseas): 317

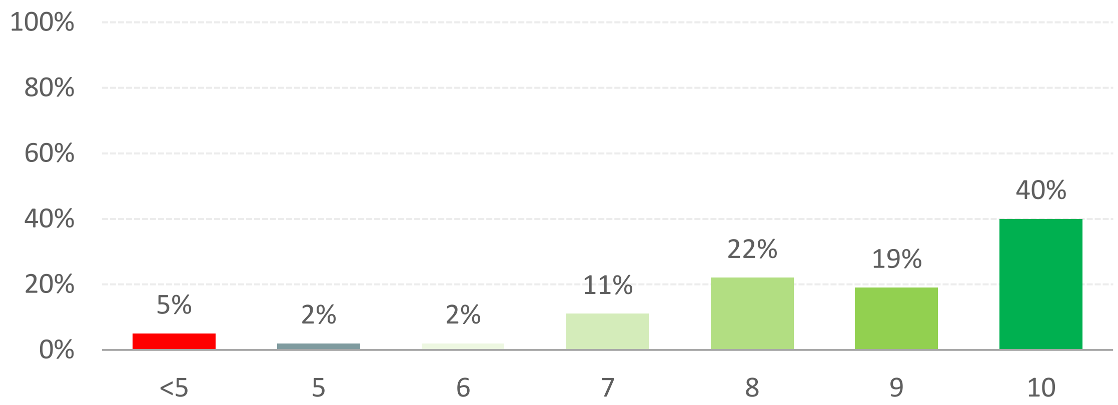
Almost all visitors from Scotland and day-trippers would also recommend the region where they played golf to others (mean score 8.53). However, propensity to recommend is lower than for Scotland as a whole. This finding is perhaps due to the fact that the focus for Scotland visitors and day trippers tends to be on the course itself, rather than the region, with fewer including non-golf activities in their trip.

Indeed, those who were most likely to provide higher scores were visitors who were likely to have experienced more than just the golf, e.g. overnight visitors and visitors on a trip where golf was not the main purpose.

The highest proportions of sub-samples providing a score of 10/10 for recommending region were:

- Overnight visitors (54%)
- Golf was not their main purpose of trip (74%)
- 45+ years old (46%)

Chart 3.12: Rating of likelihood to recommend region



Base (online Scotland and day trippers): 181

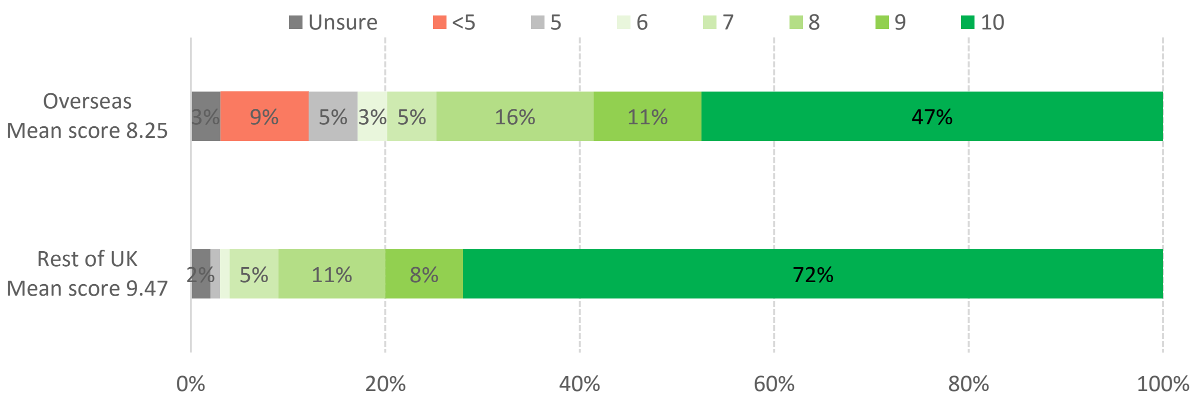
Despite the high levels of propensity to recommend, only 7% of respondents reported having left a review on a review site: 5% on TripAdviser and 2% on a golf review website. This finding may indicate that visitors prefer to make personal recommendations to friends and families, rather than via review websites. All who left reviews had rated their experience positively.

The proportion who had posted a review was broadly consistent by origin: Scotland (5%); rest of UK (9%); overseas (8%). Male respondents were more likely to leave a review (9%) than females (1%), however, there were no significant differences by age.

3.2.6 Propensity for Return Visits

As we might expect, given their proximity to Scotland, visitors from the rest of the UK were especially likely to say they will return to Scotland within the next 5 years. Almost three quarters of rest of UK visitors indicated that it is extremely likely that they will return for a holiday by providing a score of 10/10. This finding also reflects the high proportion of repeat visitors in the rest of UK sample (93%). The majority of overseas visitors also anticipated returning to Scotland for a holiday within 5 years, with only 9% considering it unlikely. Again, many overseas visitors (57%) were repeat visitors to Scotland, therefore, we would expect them to view a return visit favourably. The proportions considering a return trip likely were consistent between North American and European visitors.

Chart 3.13: Likelihood of return in next 5 years



Base (all online): Rest of UK 103, Overseas 305

Scotland residents were asked whether they anticipated returning to the region where they played golf within the next year. Just over half (55%) stated this was extremely likely by providing a score of 10/10, whilst a further 26% considered it very likely, giving a likelihood score of between 7 and 9.

3.3 Improvement Suggestions

Less than half of visitors suggested improvements to their visit. A number of individual, specific improvements were suggested including making the trip more affordable, general improvements to food/restaurants, road improvements and better Wi-Fi, internet and phone service.

Table 3.2 Suggested improvements to make trip better

Suggestion	
Nothing	55%
More affordable	9%
Better restaurants/ food	6%
Hotel Improvements	3%
Road improvements	3%
Better Wi-Fi / Internet / phone service	2%
Better hospitality	2%
Easier/ more reliable way of booking course time	2%
Improved transport links	1%
More information/guides/maps	1%
Caddies	1%
Better general maintenance	1%
Cut the rough	1%
Cut green - too slow	1%
Slow players/marshals for slow play	1%
The weather	2%
Playing better	4%
Base (all online)	**681**

3.4 Visitor Experience – Summary of Key Findings

The research indicates that golf visitors enjoy a very positive experience during their trip in Scotland. The majority of all visitors rated their experience very highly, an average score of 8.9/10 for the overall golfing experience and 8.5/10 for the overall trip.

The individual courses visited were also highly praised; the average scores for a variety of aspects of the courses were all in excess of 8/10. In particular, the service from staff received the highest praise, however, the quality and condition of the course, the club house facilities, food and drink and merchandise were also all considered excellent by the majority of visitors.

The findings also suggest that many visitors consider Scotland to be a first class golfing destination. Indeed, top box scores (strongly agree) were given by the vast majority of visitors for the variety (92%) and quality (86%) of golf courses. Furthermore, 92% agreed strongly that Scotland is worth visiting again to play golf, while 74% of overseas visitors and 91% of rest of UK visitors consider it likely that they will return to Scotland for a holiday in the next 5 years.

The experience of the majority of visitors has cemented Scotland's reputation as 'the Home of Golf' – 87% strongly agreed with this sentiment.

It is also important to note that the majority of rest of UK and overseas visitors would recommend Scotland as a golfing destination - average rating 9.2/10 (with 60% providing the top box score of 10/10). Furthermore, just less than 1 in 10 of rest of UK/overseas visitors left a review on a review website. This is critical as recommendations and reputation were found to be important influencers during the planning process.

Compared to recommendations for Scotland from rest of UK and overseas visitors, visitors from Scotland and day trippers were slightly less likely to recommend the region they visited; the average rating was 8.5/10 (with 40% providing top box score of 10/10). However, this finding is likely to reflect a greater emphasis on the course itself, rather than other local activities and attractions, amongst this group of predominantly day visitors and short breakers.

Despite the overall very positive appraisal provided by the majority of respondents, some minor areas for potential improvement were identified. These included the quality of Wi-Fi and digital coverage and, for some, things to do when not playing golf (most were happy with this but only 49% agreed strongly there is plenty to do when not playing golf). The quality of restaurants and cafes was also a minority concern; 6% mentioned this spontaneously as a suggested improvement and the quality of local restaurants and cafes achieved a mean score of 7.5/10.

4. Spend and Economic Impact

All respondents that were interviewed face-to-face, onsite at the golf course, were asked questions relating to their expenditure for their trip.

Three quarters of respondents (74%) said they could provide approximate expenditure details for their trip. Of those that could provide expenditure, 75% stated they could provide individual expenditure and 25% stated they would provide group expenditure. An average group expenditure covered 3.54 people.

Those on a day trip were asked a separate set of expenditure questions to those staying overnight, therefore findings have been reported separately below.

The day-trip expenditure reported is for those visiting from Scotland only. There were 43 day trip visitors who have travelled from further afield and spent a high proportion of their expenditure on transport and therefore inflates the average expenditure figures. For this reason, day-trip data for visitors from outside of Scotland are excluded from the analysis below.

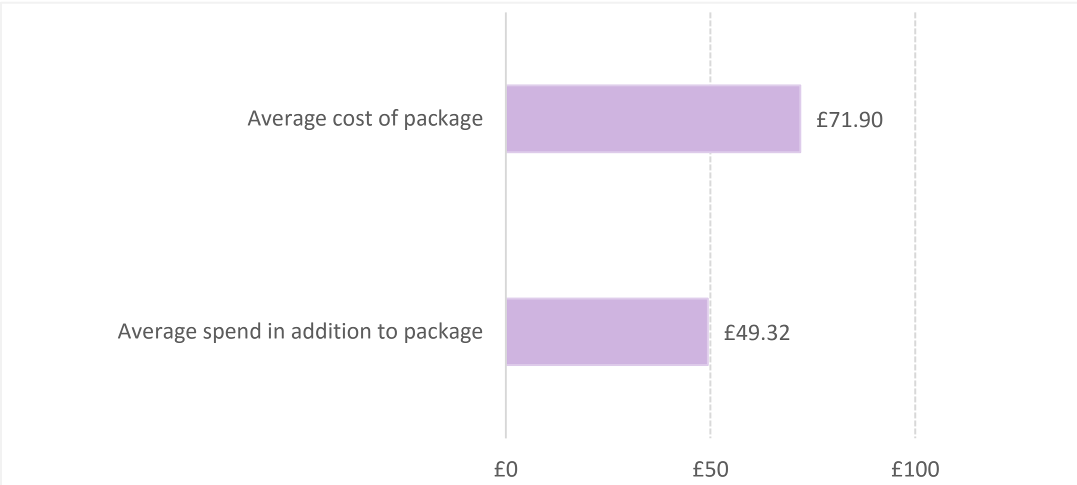
4.1 Expenditure – Day-trip Visitors

On average, each day-trip visitor from Scotland spent £64.50. This includes those on a package trip and those who booked elements of their trip individually. The expenditure figures are split out further below by the average spend of those on a day trip as part of a package and those who were not on a package.

4.1.1 Day-trip visitors on a package

The proportion of day-trip visitors on a package tour that could provide expenditure was 13%. The average cost of a day-trip visitor's package was £71.90. The package included green fees for all respondents and food for the majority (60% breakfast, 70% lunch). It only included transport to and from the golf course for around a quarter (26%). Therefore, a small amount of additional expenditure (average £49.32) was spent on items such as food and drink, transport as well as any additional green fees. The number of visitors who provided additional spend for each item was extremely low, therefore these figures have not been reported.

Chart 4.1: Average expenditure of day-trip visitors (from Scotland) on a package

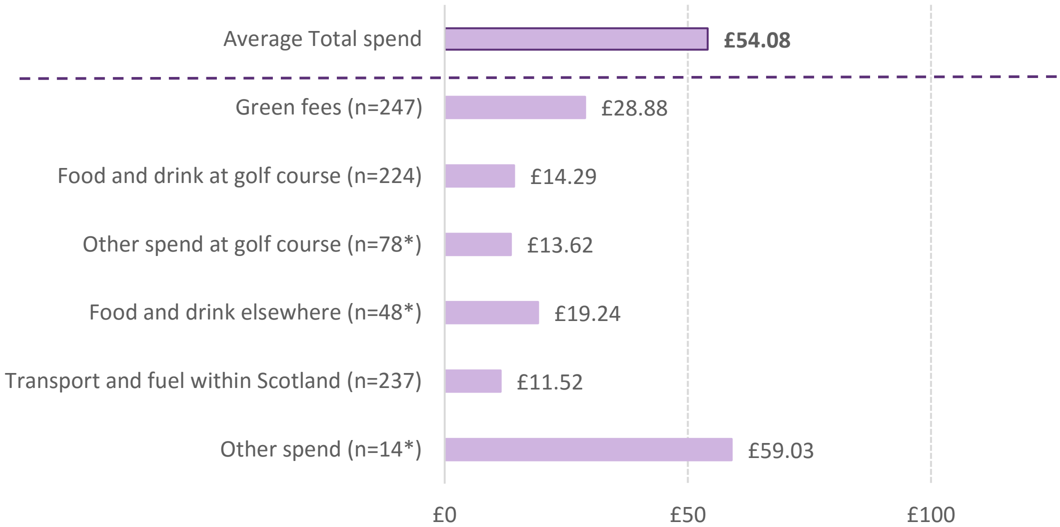


Base (Day-trip visitors from Scotland on a package who provide expenditure):78
All who provided additional spend: 71

4.1.2 Day-trip visitors not on a package

The proportion of day-trip visitors from Scotland who were not on a package and could provide expenditure was 61%. The average amount spent by those not on a package was lower at £54.08. It is important to note that the average figure for each item is based on the number of people who spent money on that item.

Chart 4.2: Average expenditure of day-trip visitors (from Scotland) not on a package

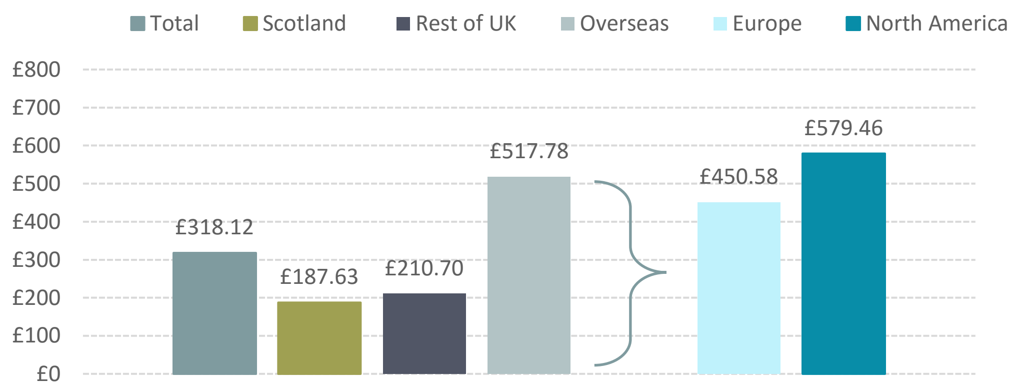


Base (Day-trip visitors from Scotland no package who provided expenditure): 283
Individual items base: Varies*
*Caution small base sizes

4.2 Expenditure – Overnight Visitors

Overnight visitors (including both visitors on a package and those travelling independently), on average, spent £318.12 each per night. As expected, this was heavily influenced by visitors from overseas. The average spend for overseas visitors per night was £517.78, with those visiting from North America spending the most (£579.46), followed by visitors travelling from Europe (£450.58). It is important to note, however, that a number of overnight visitors were on a package trip which included transport. The spend data detailed in chart 4.3 below will, therefore, include travel for those who could not break this down. Details of spend for visitors on a package versus not on a package is shown later in this section.

Chart 4.3: Average expenditure of overnight visitors (per person, per night)



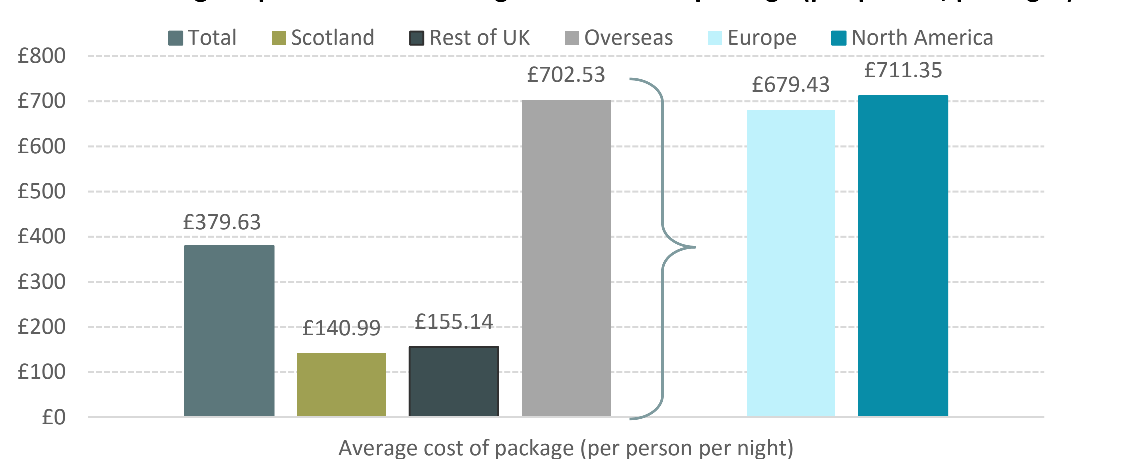
Base (all overnight visitors who provided expenditure): Total 649, Scotland 226, Rest of UK 179, Overseas 244, Europe 66*, North America 156
*Caution: small base sizes

4.2.1 Overnight visitors on a package

Overnight visitors on a package trip tended to spend more than those not on a package, however, this is due to package costs including travel. The average cost of a package across the total sample breaks down to £379.63 per night. As expected, those from overseas were likely to spend more (£702.53 per night). Visitors from Europe (average £679.43 per night) spent slightly less than those from North America (average £711.35 per night). **Please note, the sample sizes for Europe and North America are extremely small.**

Domestic visitors spent less on their overnight package trip. Those visiting from Scotland were spending, on average, £140.99 per night. Similarly, those visiting from across the rest of the UK spent on average £155.14 per night. These lower costs are likely to be due, at least in part, to lower transport costs for domestic visitors. **Please note, the sample sizes Scotland and rest of UK are extremely small.**

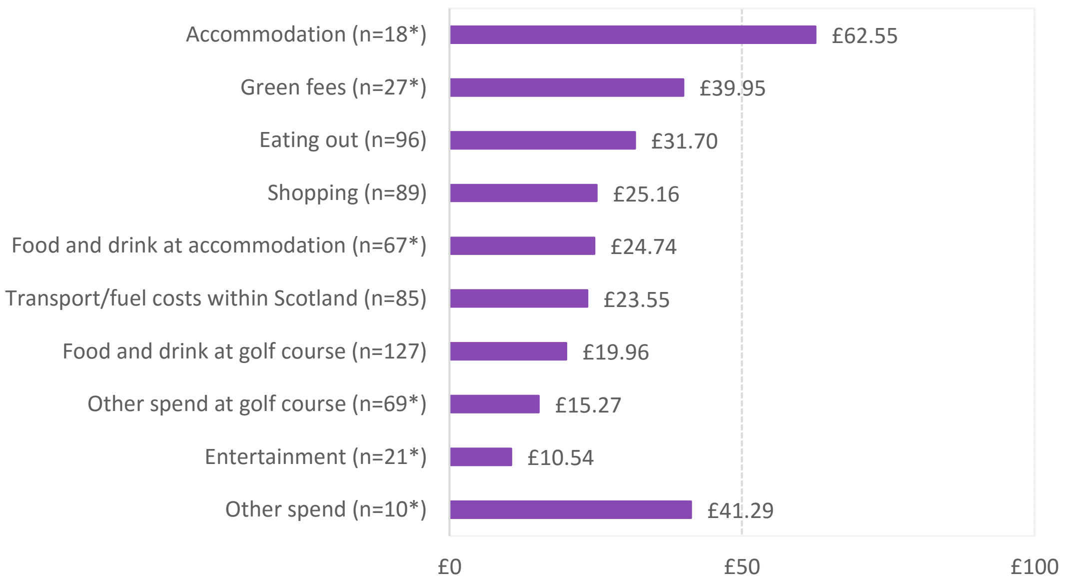
Chart 4.4: Average expenditure of overnight visitors on a package (per person, per night)



Base (Overnight visitors on package, who provided expenditure): Total 224, Scotland 72*, Rest of UK 58*, Overseas 94, Europe 26*, North America 65*
*Caution: small base sizes

Almost all visitors (91%) on a package also spent additional money on items and services not included in their package. This included accommodation, additional green fees, food and drink and travel. It is important to note that the average figures reported are based on only the number of visitors that spent money on each individual item.

Chart 4.5: Additional expenditure of overnight visitors on a package



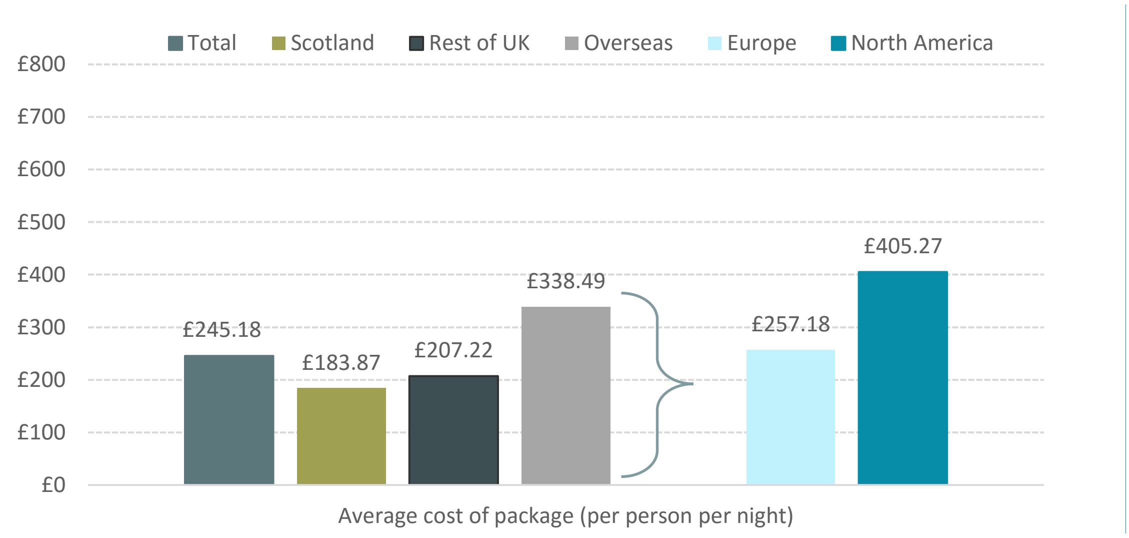
Base (Overnight visitors on package, who provided additional expenditure): Varies*
*Caution: small base sizes

4.2.2 Overnight visitors not on a package

Overnight visitors not on a package trip on average spent less per night than those on a package. The average spend across all visitors not on a package was £245.18 per night.

Again, visitors from overseas tended to spend the most, averaging £338.49 per night. Those visiting from North America were spending considerably more (£405.27 per night) than visitors from Europe (£257.18)

Chart 4.6: Average expenditure of overnight visitors not on a package (per person, per night)

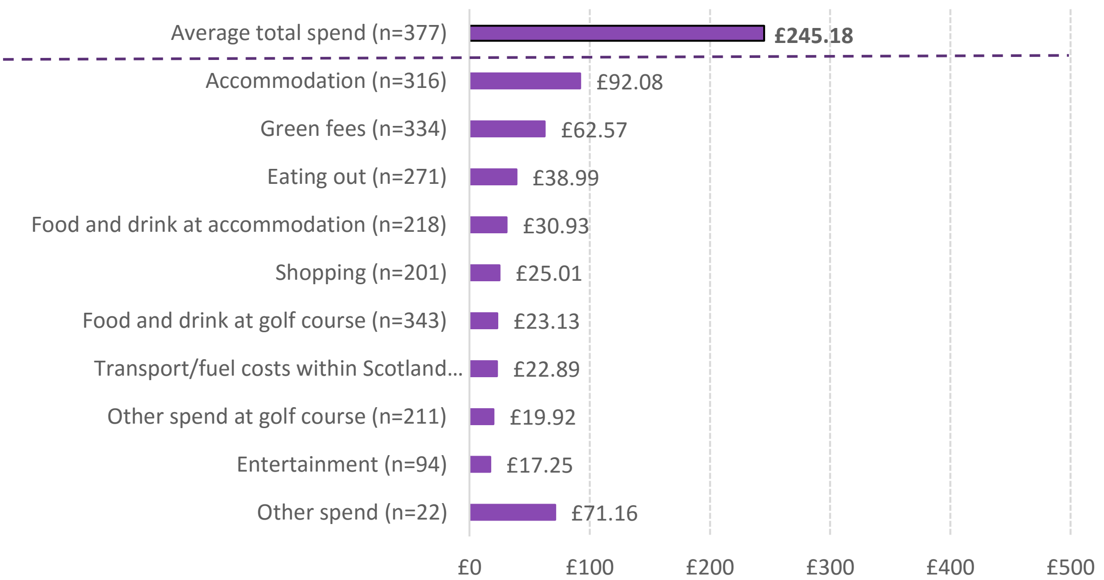


Base (Overnight visitors no package, who provided expenditure): Total 425, Scotland 154, Rest of UK 121, Overseas 150, Europe 41*, North America 90

*Caution small base size

The breakdown of the total spend is shown in chart 4.7 below. The largest outlay, for those not visiting as part of a package, was accommodation (£92.08) followed by green fees (£62.57).

Chart 4.7: Average expenditure of overnight visitors not on a package (per person, per night) – full breakdown



Base (Overnight visitors not on package, who provided expenditure): Varies*

*Caution small base size

Visitors from North America spent the most on all aspects of their trip. Their average spend on accommodation was £134.03 per night and green fees was £101.18 per night. This was considerably higher than the expenditure of visitors from Europe (accommodation £97.79, green fees £55.70) and Scotland (accommodation £74.39, green fees £45.60) and rest of UK visitors (accommodation £78.80, green fees £56.85).

Table 4.1 : Average expenditure of overnight visitors not on a package (per person, per night) – full breakdown by origin

Average expenditure Overnight visitors (no package) – By origin	Scotland	Rest of UK	Overseas	Europe	North America
Accommodation	£74.39	£78.80	£115.71	£97.79	£134.03
Green fees	£45.60	£56.85	£81.60	£55.70	£101.18
Eating out	£36.65	£31.71	£46.04	£32.24	£53.48
Food/drink at accommodation	£27.80	£29.83	£34.93	£30.74	£37.81
Transport within Scotland	£21.69	£13.85	£31.51	£29.29	£31.16
Shopping	£21.87	£22.03	£28.21	£30.26	£30.00
Food and drink at golf course	£16.80	£26.19	£27.29	£18.87	£34.15
Other spend at golf course	£12.60	£19.72	£24.14	£15.31	£28.87
Entertainment	£23.03	£19.40	£12.35	£6.35	£13.11
Other spend	£50.00	£32.40	£88.06	£50.20	£93.65
Total Base: (may vary by item)	**154**	**121**	**150**	**41***	**90**

*Caution small base size

A full economic impact analysis has been carried out by SQW and the results can be found in SQW's report (Appendix E).

Summary and Conclusions

Motivations to play golf in Scotland

Scotland enjoys a well-established reputation as 'the home of golf', especially amongst overseas visitors. This is a key motivation to visit, with many North American and European visitors citing that they had 'always wanted to play golf in Scotland' and Scotland's reputation. Visitors from Scotland are most likely to be motivated by the reputation of the course itself.

Although golfing events did not emerge spontaneously as a key motivation, they are likely to be influential in building both Scotland's reputation and the reputation of individual courses. Many visitors said such events inspired them to visit. Furthermore, almost half of rest of UK visitors and over one fifth of those from overseas had visited Scotland to attend a golfing event in the past.

Golf visitor profile

The profile of golf visitors in Scotland was in line with expectations: skewed to middle and older age groups, males and higher SEG, with two thirds from UK and one third from overseas. Some interesting insights emerged:

- Many overseas visitors were repeat visitors, indicating that a golfing trip to Scotland is not viewed as a 'once in a lifetime' trip
- Female golf visitors tend to play more frequently and are more likely to be a member of a club than their male counterparts, possibly indicating that less enthusiastic female golfers are less likely to take a golf trip, compared to males
- Overseas visitors and females were more likely to be luxury or holiday golfers, compared to males and domestic visitors: however, all were most likely to describe themselves as social golfers.

Trip characteristics

The type of trip taken varied by origin of visitor:

- **Scotland visitors** tend to take day trips and short breaks, with on average 2.6 rounds played for overnight visitors.
- Visitors from the **rest of the UK** are more likely to take short breaks of less than 4 nights, averaging 3.8 rounds of golf.
- **European** visitors take a mix of short breaks and longer holidays, averaging 4.9 rounds.
- **North American** visitors are taking longer holidays and playing on average 7.8 rounds of golf.

Across all markets, the majority of visitors were on their golf trip with friends. Non-golf days are important and the majority of overnight visitors include non-golf days, especially those from overseas. A range of other activities are undertaken on non-golf days, including walking, visiting attractions and sightseeing. The majority of overseas visitors also include visits to other parts of Scotland, most frequently Edinburgh (48%), Fife (39%) and the Highlands (27%).

Hotels were the main accommodation type used, with one third of visitors stating that their accommodation was high end/luxury. Luxury accommodation was more likely to be mentioned by overseas visitors than those from Scotland or the rest of the UK.

The vast majority of visitors used smartphones or tablets to find out information during their trip and generally satisfaction with digital coverage was high. However, around one quarter rated it with a score of 5 or less out of 10.

Planning and booking

Talking with family/friends and websites were the main sources of information (course websites, VisitScotland, traveller review websites) during the process of planning and booking the trip, so a strong online presence is essential, whilst encouraging recommendations through trusted sources is also crucial.

Overseas visitors use a wider range of resources than domestic visitors do, including advice from travel and golf professionals. These individuals are important influencers during the decision and planning process.

Booking tends to take place close to the initial planning stage, i.e. at least 3 months before the trip, and transport, accommodation and golf are all booked in a similar period. Around one quarter of all overnight visitors booked via a package, however, this proportion is higher for those from North America (38%). Golf specialists provide most packages.

Although over half of visitors prefer to book their golf online, only one third of those who booked independently (not on a package) used this method. There may be scope to improve the availability and quality of online booking systems for courses.

Online booking options were also most often used for booking accommodation, especially for those visiting from outside Scotland. Visitors from Scotland were more likely to book by telephone (49%) rather than via the accommodation website (25%) or by directly email (17%).

Rating of experience

Visitors rated their golf trip experience extremely positively. Expectations were set high due to Scotland's reputation and these were met or exceeded for almost all visitors. All aspects of the trip were rated highly, including the golfing experience, the quality and variety of courses, transport and non-golfing activities. North American visitors were particularly impressed and were the most likely to provide top scores.

The majority of visitors from the rest of the UK and from overseas expressed a propensity to recommend Scotland as a golfing destination and around 1 in 10 had posted a review on a traveller or golf review website. Most visitors from Scotland were also happy to recommend the region they visited, though this propensity slightly lower than amongst UK/overseas visitors. It might be more likely that they would recommend the course rather than the region given that many were on a day trip or short break.

Appendices

Appendix A - Regional Data Tables

Table A1 - Origin

Origin	Total	Aberdeen-shire	Ayrshire	South Scotland	Perthshire	Fife	East Lothian	Carnoustie Country	Highland	Other
Scotland	50%	23%	37%	60%	77%	41%	31%	68%	45%	79%
Rest of UK	19%	17%	26%	39%	17%	15%	29%	8%	21%	15%
Europe	9%	16%	8%	0%	3%	13%	17%	6%	8%	3%
North America	19%	37%	28%	-	2%	28%	18%	17%	25%	2%
Other overseas	2%	7%	2%	1%	2%	2%	4%	1%	1%	1%
Base	**1745**	179	123	139	304	249	237	241	128	145

Table A2 - Gender

Gender	Total	Aberdeen-shire	Ayrshire	South Scotland	Perthshire	Fife	East Lothian	Carnoustie Country	Highland	Other
Male	88%	87%	81%	96%	80%	88%	90%	93%	81%	98%
Female	12%	13%	19%	4%	20%	12%	10%	7%	19%	2%
Base	**1745**	**179**	**123**	**139**	**304**	**249**	**237**	**241**	**128**	**145**

Table A3 - Age

Age	Total	Aberdeen-shire	Ayrshire	South Scotland	Perthshire	Fife	East Lothian	Carnoustie Country	Highland	Other
18~24	2%	-	3%	6%	0%	3%	2%	2%	1%	0%
25~34	7%	8%	10%	14%	5%	9%	5%	5%	7%	2%
35~44	12%	10%	18%	14%	12%	12%	14%	14%	9%	9%
45~54	26%	29%	27%	19%	24%	25%	26%	25%	18%	36%
55~64	32%	38%	23%	29%	35%	31%	36%	33%	38%	30%
65+	20%	15%	19%	18%	23%	20%	16%	21%	28%	22%
Base	**1745**	**179**	**123**	**139**	**304**	**248**	**236**	**241**	**128**	**144**

Table A4a - Which of the following best describes your current visit?

Which of the following best describes your current visit?	Total	Aberdeen-shire	Ayrshire	South Scotland	Perthshire	Fife	East Lothian	Carnoustie Country	Highland	Other
On a leisure trip staying away from home for at least one night	63%	82%	76%	62%	37%	68%	71%	55%	82%	35%
On a business trip staying away from home for at least one night	2%	2%	5%	-	1%	3%	2%	1%	1%	2%
On a leisure day trip from home – travelled more than 30 miles to get here	34%	14%	18%	35%	59%	29%	26%	44%	16%	63%
On a business day trip from home – travelled more than 30 miles to get here	1%	2%	1%	3%	3%	0%	1%	1%	1%	1%
Base	**1745**	**179**	**123**	**139**	**304**	**249**	**237**	**241**	**128**	**145**

Table A4b - Which of the following best describes your current visit? Grouped

	Total	Aberdeen-shire	Ayrshire	South Scotland	Perthshire	Fife	East Lothian	Carnoustie Country	Highland	Other
Day trippers	35%	16%	19%	38%	61%	29%	27%	45%	17%	64%
Overnight	65%	84%	81%	62%	39%	71%	73%	55%	83%	36%
Base	**1745**	**179**	**123**	**139**	**304**	**249**	**237**	**241**	**128**	**145**

Table A5a - Which of the following best describes the purpose of your visit?

Which of the following best describes the purpose of your visit?	Total	Aberdeen-shire	Ayrshire	South Scotland	Perthshire	Fife	East Lothian	Carnoustie Country	Highland	Other
On a short break/holiday where the main purpose is to play golf	77%	76%	80%	74%	82%	78%	67%	91%	79%	66%
On a short break/holiday where golf is only part of the trip	19%	22%	14%	26%	15%	18%	30%	8%	20%	29%
On a business trip where the main purpose is to play golf	2%	1%	4%	-	1%	1%	2%	0%	2%	2%
On a business trip where golf is only part of the trip	2%	2%	2%	-	2%	3%	0%	1%	-	3%
Base	**1155**	**152**	**107**	**90**	**118**	**197**	**184**	**152**	**114**	**41**

Table A5b - Which of the following best describes the purpose of your visit? Grouped

	Total	Aberdeen-shire	Ayrshire	South Scotland	Perthshire	Fife	East Lothian	Carnoustie Country	Highland	Other
Golf main purpose	79%	77%	84%	74%	83%	79%	69%	92%	80%	68%
Golf not main purpose	21%	23%	16%	26%	17%	21%	31%	8%	20%	32%
Base	**1155**	**152**	**107**	**90**	**118**	**197**	**184**	**152**	**114**	**41**

Table A6 - First time visitor to Scotland? (Rest of UK and overseas visitors)

First time visitor to Scotland? - Rest of UK and overseas visitors	Total	Aberdeen-shire	Ayrshire	South Scotland	Perthshire	Fife	East Lothian	Carnoustie Country	Highland	Other
Yes	30%	25%	29%	8%	11%	41%	28%	38%	19%	9%
No, I've been once before	14%	11%	16%	10%	6%	15%	11%	11%	18%	16%
No, I've been several times before	44%	44%	44%	53%	71%	38%	45%	51%	47%	39%
No, I take holidays / short breaks in Scotland regularly (at least once a year)	12%	20%	11%	29%	11%	6%	16%	1%	16%	36%
Base	899	128	79	53	84	169	163	109	85	29

Table A7 - Why did you choose Scotland? (Golf main purpose, overnight visitors, excl. Scotland)

Why did you choose Scotland? - Golf main purpose , overnight visitors (excl. Scotland)	Total	Aberdeen-shire	Ayrshire	South Scotland	Perthshire	Fife	East Lothian	Carnoustie Country	Highland	Other
Scotland's reputation as a golf destination	43%	42%	37%	21%	15%	48%	49%	62%	46%	23%
I have always wanted to play golf in Scotland: The Home of Golf	42%	40%	41%	16%	8%	52%	46%	64%	29%	23%
I have taken a golfing holiday / short break in Scotland before and wanted to do so again	37%	51%	33%	33%	11%	29%	48%	42%	54%	55%
I wanted to play a particular course (s) in Scotland e.g. Links or championship courses	31%	50%	28%	11%	9%	28%	39%	25%	47%	28%
Recommendation from family/friends/colleagues	12%	12%	13%	27%	3%	12%	22%	4%	8%	-
It was organised for me / did not have a choice	12%	1%	9%	55%	6%	13%	3%	18%	17%	19%
Proximity/range of available courses	11%	18%	11%	10%	6%	11%	10%	11%	13%	3%
I was inspired to come here by golf events held in Scotland e.g. The Open, The Ryder Cup	11%	18%	16%	7%	4%	11%	10%	9%	9%	2%
I have friends / relatives here	7%	8%	11%	7%	8%	6%	8%	-	9%	5%
I found a good deal/package or special offer	5%	5%	11%	19%	-	3%	1%	-	7%	8%
Read about it in a golf magazine	2%	5%	2%	-	1%	-	4%	2%	2%	-
Direct advice from a tour operator or travel agent	1%	2%	3%	-	-	0%	1%	-	3%	-
Good exchange rates	1%	2%	-	-	-	1%	5%	2%	1%	-
Price of hotels/other accommodation	1%	-	-	17%	1%	0%	3%	1%	2%	-
Quality of accommodation	1%	-	2%	-	1%	-	2%	-	5%	-
Traveller review websites e.g. Tripadvisor, (specify)	0%	1%	1%	2%	-	-	-	-	1%	-
Other reason, (specify)	7%	2%	4%	2%	52%	4%	5%	-	9%	8%

Unsure	3%	6%	7%	-	-	1%	3%	-	-	2%
Base	**756**	**108**	**77**	**44**	**64**	**141**	**133**	**99**	**69**	**21**

Table A8 - Why did you choose [region]? (Golf main purpose, day visitors, Scotland overnight)

Why did you choose [region]? - Golf main purpose, day visitors, Scotland overnight	Total	Aberdeen-shire	Ayrshire	South Scotland	Perthshire	Fife	East Lothian	Carnoustie Country	Highland	Other
It was organised for me/did not have a choice	26%	28%	2%	36%	35%	42%	10%	33%	12%	9%
The course has a good reputation	21%	15%	17%	23%	8%	26%	26%	17%	33%	27%
To play golf with friends/family/colleagues	19%	13%	19%	18%	11%	19%	42%	11%	45%	16%
I have played this course before and wanted to return	18%	3%	29%	16%	17%	14%	14%	14%	27%	25%
Was recommended to me by friends/family/colleagues	11%	9%	11%	26%	3%	10%	33%	4%	12%	12%
I got a good deal/special offer	8%	3%	11%	14%	4%	3%	13%	5%	9%	18%
Wanted to play a specific course e.g. links, championship course	7%	12%	3%	3%	3%	6%	2%	8%	30%	7%
Price of the green fees	3%	-	-	8%	1%	3%	7%	1%	1%	4%
Was recommended to me by a golf professional	2%	18%	2%	-	1%	1%	1%	1%	1%	2%
Closeness to home	2%	-	2%	5%	2%	2%	7%	-	3%	1%
Inspired by watching golf events held in Scotland e.g. the Open, The Ryder Cup	1%	-	3%	-	-	3%	1%	-	3%	1%
Read about it in a golf magazine	1%	8%	-	-	-	-	-	-	-	4%
I didn't need to book in advance	1%	-	-	2%	-	1%	-	-	3%	-
Price/Quality of accommodation	1%	3%	4%	1%	0%	-	-	1%	3%	-
Read reviews online, (specify review site)	0%	3%	-	-	-	-	1%	-	-	-
I am/was attending a business related conference/meeting	0%	-	-	-	-	-	1%	-	-	-
None of the above/no particular reason	0%	-	-	-	-	-	1%	-	-	-
Don't know/Unsure	3%	-	27%	3%	0%	-	4%	0%	7%	0%

Other reason, (specify)	22%	7%	8%	21%	34%	6%	15%	27%	36%	36%
Base	**744**	**25**	**27**	**77**	**214**	**66**	**58**	**128**	**37**	**112**

Table A9 - Why did you choose Scotland/region? (Golf not main purpose, overnight, all markets)

Why did you choose Scotland/region? - Golf not main purpose, overnight, all markets	Total	Aberdeen-shire	Ayrshire	South Scotland	Perthshire	Fife	East Lothian	Carnoustie Country	Highland	Other
I have always wanted to play golf in Scotland: The Home of Golf	29%	46%	31%	4%	20%	27%	54%	11%	19%	11%
Scotland is a place I have always wanted to visit	22%	32%	39%	8%	20%	23%	18%	24%	10%	15%
It was recommended to me by friends, relatives or colleagues	20%	19%	18%	20%	1%	18%	37%	12%	10%	20%
The range of activities available (e.g. golf, walking, mountain biking)	19%	20%	4%	21%	29%	39%	4%	5%	11%	-
The scenery and landscape	17%	22%	21%	29%	28%	13%	13%	5%	37%	6%
To visit family/friends who live in Scotland	14%	26%	18%	17%	25%	7%	5%	33%	17%	18%
Scotland's reputation for friendly people	13%	31%	29%	14%	21%	4%	15%	-	6%	4%
The history and culture	13%	18%	11%	17%	10%	21%	10%	5%	3%	6%
To get away from it all	10%	-	5%	24%	12%	17%	3%	-	4%	14%
Special event (e.g. concert, sporting event or festival)	7%	2%	-	16%	-	-	8%	5%	13%	37%
It is easy to get to	6%	1%	-	38%	4%	7%	5%	7%	8%	-
My Scottish ancestry	6%	13%	5%	12%	5%	10%	3%	-	2%	-
To visit cities	4%	10%	4%	-	8%	4%	-	5%	13%	-
I am/was attending a business related conference/meeting	4%	-	13%	-	8%	8%	1%	-	-	-

To visit a particular attraction (specify)	3%	6%	15%	-	-	2%	-	7%	-	-
The climate and weather	3%	1%	4%	12%	-	3%	-	-	8%	-
Closeness to home	3%	-	-	5%	15%	6%	-	-	-	-
Personal event or celebration (e.g. birthday, anniversary, honeymoon, wedding)	2%	4%	4%	4%	3%	-	-	19%	-	-
Reading a book about Scotland or set in Scotland	2%	-	8%	-	6%	2%	-	-	-	-
I was inspired by online video content about Scotland	1%	-	-	12%	-	-	-	-	-	-
A movie/film about Scotland or featuring a part of Scotland	0%	2%	-	-	6%	-	-	-	-	-
Watching a TV programme about Scotland	0%	-	-	-	2%	-	-	-	-	-
I was inspired by a piece of marketing, PR or advert about Scotland	0%	-	-	-	-	-	-	-	4%	-
Seeing something on social media about Scotland	0%	-	-	4%	-	-	-	-	-	-
Reading a travel feature about Scotland in a newspaper, magazine, travel guidebook or online	-	-	-	-	-	-	-	-	-	-
None of these	1%	-	-	4%	-	-	5%	7%	-	-
Unsure	4%	18%	-	4%	-	-	6%	-	8%	5%
Something else (specify)	15%	2%	3%	30%	18%	12%	23%	-	22%	27%
Base	**228**	**36**	**18**	**18**	**26**	**37**	**46**	**14**	**21**	**12**

Table A10 - Who is/was with you on your trip?

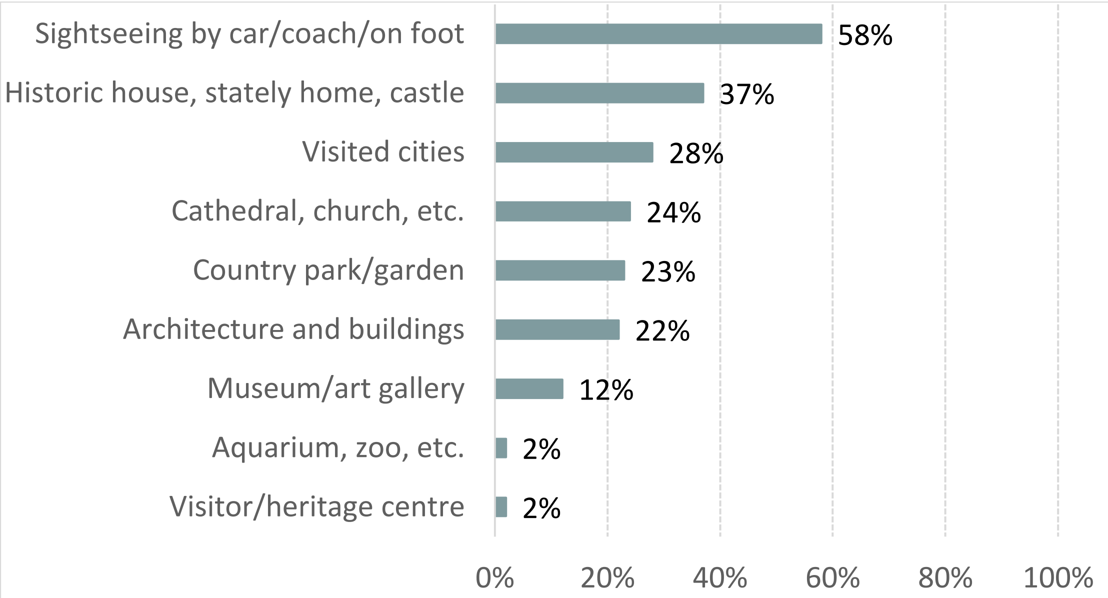
Who is/was with you on your trip?	Total	Aberdeen-shire	Ayrshire	South Scotland	Perthshire	Fife	East Lothian	Carnoustie Country	Highland	Other
On my own	6%	11%	4%	-	1%	3%	1%	7%	8%	22%
Partner/spouse	17%	24%	8%	8%	35%	23%	12%	8%	22%	5%
Your child/children	4%	2%	2%	3%	3%	7%	6%	2%	-	2%
Your parents or your partner's parents	2%	1%	1%	-	0%	3%	2%	1%	2%	-
Other members of your family	8%	3%	15%	6%	5%	10%	6%	5%	7%	7%
Friend(s)	50%	49%	58%	68%	33%	45%	59%	49%	50%	54%
An organised group	19%	7%	19%	16%	26%	23%	8%	30%	11%	16%
Business colleague(s)	7%	5%	8%	10%	9%	5%	7%	6%	11%	2%
Someone else (specify)	-	-	-	-	-	-	-	-	-	-
Base	**1745**	**179**	**123**	**139**	**304**	**249**	**237**	**241**	**128**	**145**

Table A11 - How would you rate your overall golfing experience at this course today? (Face-to-face sample only)

	Total	Aberdeen-shire	Ayrshire	South Scotland	Perth -shire	Fife	East Lothian	Carnoustie Country	Highland	Other
Mean	**8.93**	**8.38**	**9.06**	**8.7**	**8.76**	**9.03**	**8.87**	**8.8**	**9.07**	**8.96**
Top 2 box (rate 9 or 10)	**63%**	**46%**	**67%**	**58%**	**60%**	**67%**	**63%**	**52%**	**65%**	**66%**
10 – Very Good	35%	17%	45%	29%	25%	41%	32%	29%	45%	28%
9	28%	29%	22%	29%	35%	26%	31%	23%	20%	38%
8	23%	30%	22%	25%	24%	20%	27%	30%	23%	22%
7	7%	9%	5%	12%	7%	7%	8%	8%	6%	3%
6	1%	6%	1%	2%	2%	1%	0%	1%	-	1%
5	0%	2%	1%	-	-	-	-	-	1%	-
4	0%	-	-	0%	-	-	0%	-	-	-
3	0%	-	0%	-	0%	-	-	-	-	-
2	-	-	-	-	-	-	-	-	-	-
1 - Very Poor	0%	-	-	-	0%	-	-	-	-	-
Unsure	6%	6%	4%	2%	7%	5%	3%	9%	5%	8%
Base	**1412**	**53**	**91**	**136**	**287**	**233**	**166**	**225**	**89**	**132**

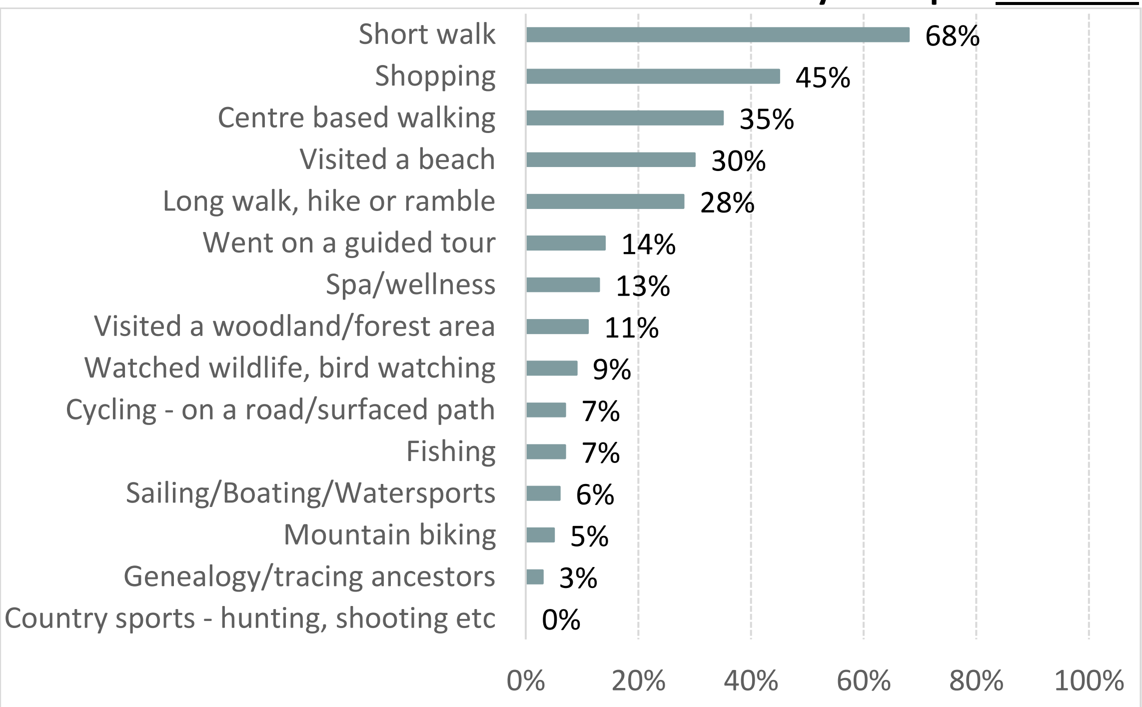
Appendix B - Activities Undertaken on Trip

Chart B1: Other activities undertaken in Scotland on your trip? - Attractions



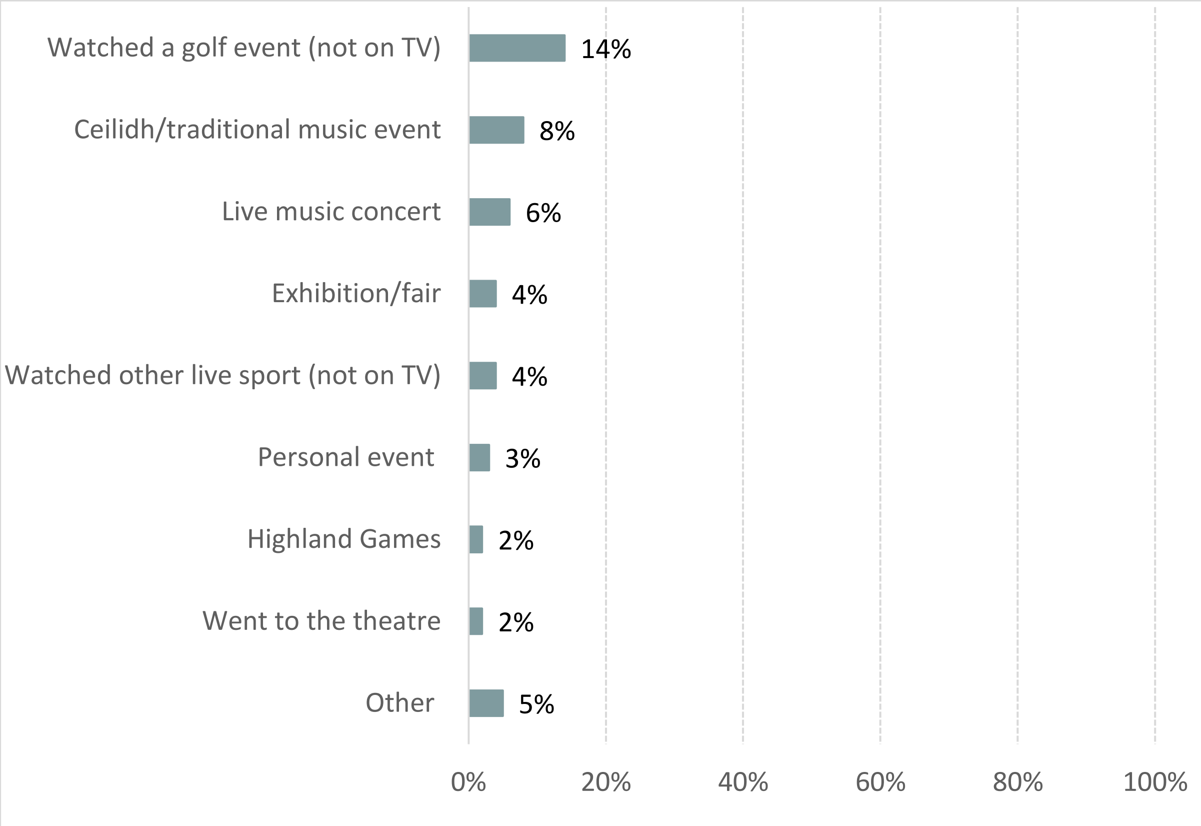
Base (f2f online overnight): 92*
*Caution small base size

Chart B2: Other activities undertaken in Scotland on your trip? - Activities



Base (f2f online overnight): 92*
*Caution small base size

Chart B3: Other activities undertaken in Scotland on your trip? - Events



Base (f2f online overnight): 92*
*Caution small base size

Appendix C - Questionnaires

Face to Face Questionnaire

INTERVIEWER: SELECT SAMPLE REGION OR LOCATION

	Code	FOR OFFICE INFO ONLY – Sample Regions
Aberdeen City and Shire	1	Aberdeen City & Shire
Angus & Dundee	2	Carnoustie Country
Argyll & the Isles	3	Argyll
Ayrshire and the Isle of Arran	4	Ayrshire & Arran
Dumfries & Galloway	5	D&G
Edinburgh City	6	Edinburgh
Fife	7	Fife
Glasgow City	8	Glasgow
The wider Glasgow area (e.g. Dumbarton, Lanark, Motherwell, Paisley, Balloch, south Loch Lomond)	9	Lanarkshire Loch Lomond Clyde Valley
Lothians	10	East Lothian West Lothian
Perth & Perthshire	11	Perthshire
Scottish Borders	12	Scottish Borders
Stirling, Falkirk & Forth Valley	13	Falkirk Stirling
The Highlands of Scotland (Includes Moray)	14	Highlands

INTEREVIEWER: PLEASE CODE COURSE WHERE INTERVIEW TAKING PLACE.

Scripting - please mask course selection by region

Introduction
Good morning/afternoon, I am _______________ from Progressive, an independent market research company that is carrying out a survey with visitors to __________________ (name of course where interview being conducted) on behalf of the Scotland Golf Development Group
[Interviewer note: If further clarification is required please say that VisitScotland and Scottish Enterprise have commissioned the research].

We are keen to hear about your golfing experience to help us improve golfing in the region and across Scotland for the benefit of future visitors. The research will also help us to understand the economic impact of golfers coming to the area and Scotland as a whole. The interview should take no more than 10 minutes / 13 minutes to complete.

QA. Which of the following is your preferred language?

	Code
English	1
German	2
French	3

QB. Are you a member of this golf club? [Interviewer note: If member determine type of member]

	Code	Route
Yes – Local Member	1	CLOSE

Yes – Country Member	2	QC
Yes – Overseas Member	3	QC
No	4	QC

QC. Can I just confirm, will you be playing or have you played golf as part of your visit today?

	Code	Route
Yes	1	QD
No	2	CLOSE

QD. Are you willing to take part in the survey?

	Code	Route
Yes	1	QF
Not just now/ no time	2	QE
No - Refused	3	CLOSE

QE. There is an option to complete a survey online. As you have no time just now would you like us to email you with a link so you can complete it later?

	Code	Route
Yes	1	COLLECT EMAIL ADDRESS
No - Refused	2	CLOSE

QF. Gender

	Code	
Male	1	CHECK QUOTA
Female	2	

SQ1. Where do you live?

	Code	Route
Scotland	1	SQ2
England	2	SQ4
Wales	3	
Northern Ireland	4	
Other UK (Channel islands and Isle of Man)	5	
Republic of Ireland	6	
Germany	7	
France	8	
Italy	9	
Spain	10	
Netherlands	11	
Sweden	12	
Other European (Please specify)	13	
USA	14	
Canada	15	
Australia	16	
New Zealand	17	
Other (please specify)	18	

ASK SCOTTISH RESIDENTS ONLY – CODE 1 AT SQ1

SQ2. Do you live within 30 miles of this golf course?

	Code	Route
Yes	1	CLOSE
No	2	SQ3

SQ3. Which local authority do you live in?

	Code
Aberdeen	1
Aberdeenshire	2
Angus	3
Argyll and Bute	4
Clackmannanshire	5
Dumfries and Galloway	6
Dundee	7
East Ayrshire	8
East Dunbartonshire	9
East Lothian	10
East Renfrewshire	11
Edinburgh	12
Falkirk	13
Fife	14
Glasgow	15
Highland	16
Inverclyde	17

Midlothian	18
Moray	19
Na h-Eileanan Siar	20
North Ayrshire	21
North Lanarkshire	22
Orkney	23
Perth and Kinross	24
Renfrewshire	25
Scottish Borders	26
Shetland	27
South Ayrshire	28
South Lanarkshire	29
Stirling	30
West Dunbartonshire	31
West Lothian	32
Unsure/Don't know	33

ASK ALL EXCEPT SCOTTISH RESIDENTS

SQ4. How did you travel to Scotland? Please tick all that apply. MULTICODE

	Code
Plane – direct from home country to Scotland	1
Plane – indirect; including a stop somewhere between home country and Scotland	2
Train – within UK	3
Train – outside UK e.g. Eurostar	4
Public Bus / coach	5
Organised coach tour	6
Own car	7
Friend / family member's car	8
Hire car	9
Motorhome / campervan	10
Motorcycle / motorbike	11
Bicycle	12
Boat / ship / ferry	13
Other (specify) __________________	14

MAIN QUESTIONS

Visitor Behaviour

Q1. How many rounds of golf have you or do you intend to play on this trip i.e. the total number of rounds for your whole trip?

WRITE IN QUANTITY	

Q2. Which of the following best describes your current visit?

SHOW SCREEN – SINGLE CODE ONLY

	Code	Route
On a leisure trip staying away from home for **at least one night**	1	Q3
On a business trip staying away from home for **at least one night**	2	Q3
On a leisure **day trip** from home – travelled more than 30 miles to get here	3	Q8
On a business **day trip** from home – travelled more than 30 miles to get here	4	Q8

ASK OVERNIGHT VISITORS

Q3. Which of the following best describes the purpose of your short break/holiday or business trip?
SHOW SCREEN – SINGLE CODE ONLY

PLEASE MASK BY RESPONSE TO Q2	Code
On a short break/holiday where the main purpose is to play golf	1
On a short break/holiday where golf is only part of the trip	2
On a business trip where the main purpose is to play golf	3
On a business trip where golf is only part of the trip	4

OVERNIGHT VISITORS
ASK IF CODE 1 OR 2 AT Q2

Q4. How many nights will you be spending in >>>INSERT REGION/LOCATION<<?

Q4. WRITE IN QUANTITY	

ASK IF CODE 1 OR 2 AT Q2

Q5. Of the days you are spending in >>>INSERT REGION/LOCATION<<<, how many are going to include golf and how many will be non-golf days? *Interviewer note: Please push for best guess/approximation*

Golf days	
Non-golf days	

Q6. How many nights will you be spending elsewhere in Scotland?

Q6. WRITE IN QUANTITY	

ASK IF Q6 >0

Q7. Of the days you are spending elsewhere in Scotland how many are going to include golf and how many will be non-golf days? *Interviewer note: Please push for best guess/approximation*

Golf days	
Non-golf days	

ASK ALL

Q8. Which of the following best describes who is with you on your trip?

SHOW SCREEN - MULTICODE POSSIBLE

	Code
On my own	1
Partner/spouse	2
Your child/children	3
Your parents or your partner's parents	4
Other members of your family	5
Friend(s)	6
An organised group	7
Business colleague(s)	8
Someone else, specify_____________	9

Q9. Including yourself, how many people are in your group for this trip? Please tell me how many are playing golf and how many are not.

Playing golf	WRITE IN
Not playing golf	WRITE IN
Total	CALCULATE

ASK OF OVERNIGHT VISITORS ONLY. EXCLUDE SCOTTISH RESIDENTS.

Q10. Is this the first time you have taken a holiday, short break or business trip in Scotland?
Show screen.

	Code
Yes	1
No, I've been once before	2
No, I've been several times before	3
No, I take holidays / short breaks in Scotland regularly (at least once a year)	4

ASK ALL

Expenditure

I would now like to ask you a few questions about your expenditure on this trip. This information will allow us to calculate the amount spent in relation to golf in the region and Scotland as a whole.

Q11. Are you able to provide approximate spend for your trip? [Interviewer note: if respondent is on a package trip and can provide the cost of the overall package please select Yes]

	Code	Route
Yes	1	Q12
No - all expenses paid trip / someone else organised trip	2	Q25

Q12. Can I ask whether it would be easier for you to provide your own individual spend for the trip or the total spend for your group for the trip? [Interviewer note: Please push for individual spend where possible]

	Code	Route
Individual spend	1	Q14
Group spend	2	Q13

ASK IF CODE 2 AT Q12

Q13. How many people will your group spend cover?

QUANTITY WRITE IN	

Q14. Which is your preferred currency for providing amounts relating to your expenditure?

	Code
Sterling	1
Euros	2
USA Dollars	3
Other (specify)	4

The next set of questions will be routed depending on whether the respondent is a day tripper or an overnight visitor. Similar questions are asked the wording is just slightly different.

SCRIPTING NOTE: INSERT 'YOU' OR 'YOUR GROUP' DEPENDING ON RESPONSE TO Q12

DAY TRIPPERS ONLY

Q15. Can I check, are you on a package or did you get some form of deal for your trip today?

	Code	Route
Yes – On a package tour/deal	1	Q16
No	2	Q19

DAY TRIPPERS ON PACKAGE TOUR

ASK IF CODE 1 AT Q15

Q16. What was the total cost of *your/your group's* package/deal?

AMOUNT WRITE IN	

ASK IF CODE 1 AT Q15

Q17. What does your package/deal cover?

	Code
Green fees	1
Breakfast	2
Lunch	3
Transport to and from golf course	4
Other (specify)	5

ASK IF CODE 1 AT Q15

Q18. How much will *you/your group* spend in addition to your package on each of the following during your trip today? INTERVIEWER NOTE: Only include spend as part of this current trip

ONLY ASK ABOUT ADDITIONAL ITEMS NOT INCLUDED IN PACKAGE	**Write in**
Green fees	
Food and drink at the golf course/club	
Other spend at the golf course/club (excl food and drink)	
Food and drink (elsewhere)	
Transport/ fuel costs (within Scotland)	
Other	
TOTAL	

ASK IF CODE 2 AT Q15 – DAY TRIPPER NOT ON A PACKAGE TRIP

Q19. Thinking about your trip as a whole, how much are *you/your group* likely to spend on each of the following? INTERVIEWER NOTE: Only include spend as part of this current trip

	Write in
Green fees	
Food and drink at the golf course/club	
Other spend at the golf course/club (excl food and drink)	
Food and drink (elsewhere)	
Transport/ fuel costs (within Scotland)	
Other	
TOTAL	

OVERNIGHT VISITORS ONLY

Q20. Can I check, are you on a package tour or did you get some form of deal for this trip?

	Code	Route
Yes – On a package tour/deal	1	Q21
No	2	Q24

OVERNIGHT VISITORS ON PACKAGE TOUR

ASK IF CODE 1 AT Q20

Q21. What was the total cost of *your/your group's* package?

AMOUNT WRITE IN	

ASK IF CODE 1 AT Q20

Q22. What does *your/your group's* package cover?

	Code
Green fees	1
Food and drink at golf course/club	2
Other spending at golf courses (excluding food and drink)	3
Accommodation	4
Food and drink at accommodation	5
Eating out (excluding at accommodation or golf courses)	6
Shopping, e.g. gifts and souvenirs	7
Entertainment (including entry fees/tickets)	8
Travel/fuel costs in and around the region and Scotland	9
Travel to Scotland	10
Other (specify)	11

ASK IF CODE 1 AT Q20

Q23. How much will you spend in addition to *your/your group's* package on each of the following during your trip? INTERVIEWER NOTE: Only include spend as part of this current trip

	Write in
Green fees	
Food and drink at golf course/club	
Other spending at golf courses (excluding food and drink)	
Accommodation	
Food and drink at accommodation	
Eating out (excluding at accommodation or golf courses)	
Shopping, e.g. gifts and souvenirs	
Entertainment (including entry fees/tickets)	
Travel/fuel costs in and around the region and Scotland (do not include travel to get to Scotland)	
Other (specify)	
TOTAL	CALCULATE

ASK IF CODE 2 AT Q20 – OVERNIGHT VISITOR NOT ON A PACKAGE TRIP

Q24. Thinking about your trip as a whole, how much are *you/ your group* likely to spend in each of the following? INTERVIEWER NOTE: Only include spend as part of this current trip

	Write in
Green fees	
Food and drink at golf course/club	
Other spending at golf courses (excluding food and drink)	
Accommodation	
Food and drink at accommodation	
Eating out (excluding at accommodation or golf courses)	
Shopping, e.g. gifts and souvenirs	
Entertainment (including entry fees/tickets)	
Travel/fuel costs in and around the region and Scotland (do not include travel to get to Scotland)	
Anything else________________	
TOTAL	CALCULATE

Motivations

OVERNIGHT VISITORS & GOLF IS MAIN PURPOSE (EXCL. ALL SCOTTISH RESIDENTS)

Q25. Thinking about your decision to choose Scotland for your golfing holiday or short break, why did you choose Scotland? MULTICODE - PROMPTED SHOW CARD

	Code
I have always wanted to play golf in Scotland: The Home of Golf	1
I have taken a golfing holiday / short break in Scotland before and wanted to do so again	2
Scotland's reputation as a golf destination	3
I wanted to play a particular course (s) in Scotland e.g. Links or championship courses	4
Proximity/range of available courses	5
I was inspired to come here by golf events held in Scotland e.g. The Open, The Ryder Cup	6
Recommendation from family/friends/colleagues	7
I found a good deal/package or special offer	8
Direct advice from a tour operator or travel agent	9
Traveller review websites e.g. Tripadvisor, specify______________	10
Price of airline tickets *(if plane coded as method of transport - mask if not appropriate)*	11
Good exchange rates *(overseas only -mask if not appropriate)*	12
Price of hotels/other accommodation	13
Read about it in a golf magazine	14
I have friends / relatives here	15
I am/was attending a business related conference/meeting	16
It was organised for me / did not have a choice	17
Quality of accommodation	18
Other reason, specify__________________	19

Unsure	20

DAYTRIPPERS & OVERNIGHT SCOTTISH RESIDENT VISITORS & GOLF MAIN PURPOSE

Q26. Why did you choose >>>INSERT REGION/LOCATION<< to play golf today? MULTICODE - PROMPTED SHOW CARD

	Code
Was recommended to me by friends/family/colleagues	1
Was recommended to me by a golf professional	2
Inspired by watching golf events held in Scotland e.g. the Open, The Ryder Cup	3
Wanted to play a specific course e.g. links, championship course	4
The course has a good reputation	5
To play golf with friends/family/colleagues	6
I have played this course before and wanted to return	7
Read about it in a golf magazine	8
Read reviews online, specify review site___________	9
I got a good deal/special offer	10
Price of the green fees	11
Closeness to home	12
I didn't need to book in advance	13
I am/was attending a business related conference/meeting	14
It was organised for me/did not have a choice	15
Price/Quality of accommodation *(overnight Scottish visitors only)*	16
Other reason, specify________________	17
Don't know/Unsure	18
None of the above/no particular reason	19

OVERNIGHT VISITORS & GOLF NOT MAIN PURPOSE (ALL MARKETS)

Q27. Thinking about your decision to choose Scotland (or this area of Scotland for Scottish Residents) for your holiday or short break, why did you choose Scotland (or this area of Scotland)? Please tick all that apply. MULTICODE - PROMPTED SHOW CARD *(SHOW CARD WILL SHOW LISTS SEPARATED UNDER HEADINGS PROVIDED)*

	Code
GENERAL	
Scotland is a place I have always wanted to visit *(exclude Scottish residents)*	1
I have always wanted to play golf in Scotland*: The Home of Golf* *(exclude Scottish residents)*	2
Scotland's reputation for friendly people	3
It was recommended to me by friends, relatives or colleagues	4
To visit family/friends who live in Scotland	5
To visit a particular attraction (please write in the attraction_______)	6
The range of activities available (e.g. golf, walking, mountain biking)	7
Special event (e.g. concert, sporting event or festival)	8
Personal event or celebration (e.g. birthday, anniversary, honeymoon, wedding)	9
To get away from it all	10
To visit cities	11
The history and culture	12
The scenery and landscape	13
The climate and weather	14
Closeness to home *(UK residents only)*	15
It is easy to get to	16

My Scottish ancestry	17
I am/was attending a business related conference/meeting	18
MEDIA	
A movie/film about Scotland or featuring a part of Scotland	19
Watching a TV programme about Scotland	20
Reading a book about Scotland or set in Scotland	21
Reading a travel feature about Scotland in a newspaper, magazine, travel guidebook or online	22
I was inspired by a piece of marketing, PR or advert about Scotland	23
I was inspired by online video content about Scotland	24
Seeing something on social media about Scotland	25
Something else (please specify)	26
Unsure	27
None of these	28

Satisfaction

Q28. How would you rate your overall golfing experience at this course today? Please rate on a scale of 1 to 10 where 1 is very poor and 10 is very good

	Code
1 - Very Poor	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9
10 – Very Good	10
Unsure	11

Q29. Why do you say that? OPEN ENDED – PROBE FULLY

____

ASK ALL

Q30. Apart from the weather, can you suggest anything that would have made your golfing visit to <u>this course</u> better? INTERVIEWER NOTE - do not accept better weather or playing better if respondents states that everything was great, probe further for a response

____

ASK ALL EXCEPT SCOTTISH RESIDENTS

Q31. Apart from the weather, can you suggest anything that would have made your golfing visit to <u>Scotland</u> better? INTERVIEWER NOTE - do not accept better weather or playing better if respondents states that everything was great, probe further for a response

____

Classification & Playing ability

The final few questions are for classification purposes.

Q32. How often do you tend to play golf in the months of May to October (main golfing season)?

	Code
At least once a week	1
1 - 3 times a month	2
About once a month	3
About once every 2 months	4
About once every 3 months	5
Less often	6

Q33. Are you a member of a golf club?

	Code
Yes	1
No	2

Q34. Do you have an official handicap?

	Code
Yes, please record____________________	1
No	2

ASK IF NO AT Q34

Q35. How would you describe your golfing ability? Please rate on a scale of 1 to 10 where 1 is very poor and 10 is very good

	Code
1 - Very Poor	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9
10 – Very Good	10
Prefer not to say	11

Q36. Age

	Code
18-20	1
21-24	2
25-34	3
35-44	4
45-54	5
55-64	6

65-74	7
75+	8
Prefer not to say	9

Q37. What is the occupation of the chief wage earner in the household
Job title
Sector
Refused

Q38. Social Class – INTERVIEWER TO CODE

	Code
AB	1
C1	2
C2	3
DE	4
Refused	5

ONLY ASK UK RESIDENTS

Q39.
The Scotland Golf Development Group, which includes ________________ (INSERT course where interview taking place) are keen to gain more information about your visit today, when your trip is complete. To allow them to do so we would like to send you an online questionnaire in the next few weeks. All who complete an online questionnaire will be entered into a prize draw with a chance to win one of five £75 amazon vouchers. Would you be willing to fill in an online questionnaire about your visit?

Your email address will be kept confidential and will only be used for the purpose of this research project.

Yes – collect email address **(read out, make sure correct and confirm)** EMAIL: _________________
No – THANK AND CLOSE

THANK AND CLOSE

Online Questionnaire

When answering the questions in this survey please think of your recent golfing trip, when you spoke to an interviewer at the golf course.

ASK ALL - PRE-POPULATED FROM F2F

Q1. Where do you live?

	Code
Scotland	1
England	2
Wales	3
Northern Ireland	4
Other UK (Channel islands and Isle of Man)	5
Republic of Ireland	6
Germany	7
France	8
Italy	9
Spain	10
Netherlands	11
Sweden	12
Other European (Please specify)	13
USA	14
Canada	15
Australia	16
New Zealand	17
Other (please specify)	18

ASK ALL – PRE-POPULATED FROM F2F

Q2. Which of the following best describes your recent golfing trip in Scotland? Please note this is in reference to the recent trip you had when you completed a survey with one of our interviewers.

	Code
I was on a leisure trip staying away from home for **at least one night**	1
I was on a business trip staying away from home for **at least one night**	2
I was on a leisure **day trip** from home – travelled more than 30 miles to get here	3
I was on a business **day trip** from home – travelled more than 30 miles to get here	4

ASK OVERNIGHT VISITORS ONLY

Q3. We understand you played golf recently in >>INSERT LOCATION<<<, which other areas of Scotland, if any, did you visit on your trip? Please select all that apply

	Code
Edinburgh City	1
Lothians (e.g. North Berwick, Gullane, Linlithgow)	2
Glasgow City	3
The wider Glasgow area (e.g. Dumbarton, Lanark, Motherwell, Paisley, Balloch, south Loch Lomond)	4
Aberdeen City and Shire (e.g. Aberdeen, Ballater, Braemar)	5
Angus & Dundee (e.g. Dundee, Arbroath, Glamis)	6
Argyll & the Isles (e.g. Mull, Islay, Loch Fyne, Crianlarich, Campbelltown)	7
Ayrshire and the Isle of Arran (e.g. Alloway, Troon, Largs)	8
Dumfries & Galloway (e.g. Stranraer, Moffat, Gretna)	9
Scottish Borders (e.g. Peebles, Jedburgh, Melrose)	10
Fife (including St Andrews)	11
Stirling, Falkirk & Forth Valley (e.g. Callander, Aberfoyle, Killin, Alloa)	12
Perth & Perthshire (e.g. Pitlochry, Aberfeldy, Blair Atholl, Crieff)	13
The Highlands of Scotland and the Isle of Skye (e.g. Inverness, Loch Ness, Aviemore, Fort William, Nairn)	14
Outer Hebrides (Harris, Lewis, Uists)	15
Orkney	16
Shetland	17
Unsure	18
Did not visit any other parts of Scotland	19

ASK OVERNIGHT VISITORS ONLY. Please mask courses by regions played.

Q4. As well as XX course (pulled through from F2F), which of the following courses, if any, did you play golf at during your recent trip in Scotland - LIST OF COURSES INCLUDED IN RESEARCH FOR REGION PLAYED AND OTHER AREA VISITED

Q5. Did you play at any other courses in Scotland on this trip? OPEN QUESTION.
Option for: Did not play at any other courses
Scripting Instruction: Please use boxes to only allow one course per box

ASK ALL

Q6. At [name of course from F2F], how would you rate each of the following on a scale of 1 to 10 where 1 is very poor and 10 is very good?
Day trippers text only (first question they read): **We understand you played golf at >>>Insert course<<< how would you rate each of the following on a scale of 1 to 10 where 1 is very poor and 10 is very good?**

ASK OVERNIGHT ONLY

Q7. Of the other golf courses you played, which other course would you like to rate?
>>insert other courses from Q4 &Q5<< **For <Insert other course selected at Q7>, how would you rate each of the following on a scale of 1 to 10 where 1 is very poor and 10 is very good? (Course picked at random if more than two courses played)**

	1 = Very Poor	2	3	4	5	6	7	8	9	10 = Very Good	Unsure
a. The challenge of the course	1	2	3	4	5	6	7	8	9	10	11
b. The condition of the course (greens, fairways, etc.)	1	2	3	4	5	6	7	8	9	10	11
c. The service you received from staff	1	2	3	4	5	6	7	8	9	10	11
d. The quality of food and drink available	1	2	3	4	5	6	7	8	9	10	11
e. The quality of club house facilities	1	2	3	4	5	6	7	8	9	10	11
f. The quality of the club shop and the merchandise available	1	2	3	4	5	6	7	8	9	10	11

Planning Your Trip

ASK ALL

Q8. How far in advance did you start thinking about and planning your recent trip? Please select one only

	Code
Less than 2 weeks before travelling	1
2 to 4 weeks before travelling	2
1 to 2 months before travelling	3
3 to 6 months before travelling	4
6 months to 1 year before travelling	5
1 to 2 years before travelling	6
Over 2 years before travelling	7
I didn’t plan this trip	8
Not sure	9

ASK ALL EXCEPT THOSE WHO DID NOT PLAN (CODE 8 AT Q8)

We are interested in what information you used to help plan and book your trip once you had decided to take a trip (including a day trip) to play golf in Scotland.

Q9. Which of the following sources of information were helpful when planning your trip in Scotland?
Please select all that apply.

	Code
Talking with friends / family	1
Personal advice from travel professionals or agencies	2
Personal advice from golf professionals	3
Calls to travel providers, such as airlines and hotels	4
Calls / visits to visitor information offices	5
Golf magazines/brochures e.g. Golf Digest	6
Printed travel guide books (e.g. Lonely Planet, Rough Guide, Fodors)	7
Newspapers / magazines	8
TV / radio	9
Websites (e.g. search engines, review websites, golf websites, travel agency / transport provider websites etc)	10
Apps	11
Other (please specify_____________)	12
None - did not use any information	13

ASK IF CODED WEBSITE (CODE 10) AT Q9

Q10. What websites did you use when planning your trip in Scotland? Please select all that apply

	Code
Google search engine	1
Other search engine (e.g. Yahoo, MSN, Bing)	2
Travel agency websites (e.g. Thomas Cook, Expedia)	3
Traveller review websites (e.g. TripAdvisor)	4
Travel search engine website (e.g. Skyscanner)	5
Transport provider website (e.g. Easyjet, British Airways (UK), United (US), AirCanda (CA), Qantas (AU))	6
www.Visitscotland.com	7

Travel guide website (e.g. lonelyplanet.com)	8
Magazine/newspaper websites (e.g. National Geographic online, Guardian)	9
Social media (e.g. Facebook, Instagram)	10
Individual golf course website	11
www.golfbreaks.com	12
www.golfaroundscotland.co.uk	13
www.golfersscotland.co.uk	14
www.bunkered.co.uk	15
www.todaysgolfer.co.uk	16
www.golf-monthly.co.uk	17
www.yourgolftravel.com	18
Other golf specific website, please specify_______	19
Other website, please specify	20
Don't know/Can't remember	21

Booking Your Trip

ASK ALL

Q11. How far in advance did you book your golf for this trip? Please select one only

	Code
Didn't book in advance	1
Less than 2 weeks before the trip	2
2 to 4 weeks before the trip	3
1 to 2 months before the trip	4
3 to 6 months before the trip	5
Over 6 months before the trip	6
Not sure/ Someone else booked it	7

ASK ALL OVERNIGHT VISITORS AT Q2

Q12. How far in advance did you book your accommodation for this trip? Please select one only

	Code
Didn't book in advance	1
Less than 2 weeks before travelling	2
2 to 4 weeks before travelling	3
1 to 2 months before travelling	4
3 to 6 months before travelling	5
Over 6 months before travelling	6
Not sure/ Someone else booked it	7

ASK ALL UK AND OVERSEAS VISITORS AT Q2

Q13. How far in advance did you book your transport to Scotland for this trip? Please select one only

	Code
Didn't book in advance	1
Less than 2 weeks before travelling	2
2 to 4 weeks before travelling	3
1 to 2 months before travelling	4
3 to 6 months before travelling	5
Over 6 months before travelling	6
Not sure/ Someone else booked it	7
Did not book transport (e.g. using own private car)	8

ASK ALL OVERNIGHT EXCEPT THOSE WHO DID NOT BOOK IN ADVANCE OR SOMEONE ELSE BOOKED IT AT Q12

Q14. Did you book a package tour for this trip, i.e. booked accommodation, travel and/or green fees as one package? Please select one only

	Code
Yes	1
No	2
Unsure/Don't know/I Didn't book it	3

ASK IF YES AT Q14

Q15. How did you book your package? Please select one only

	Code
Through a golf specialist golf tour operator e.g. golfbreaks.com	1
Through a general tour operator / travel company e.g. Thomson, Thomas Cook, Agence de voyages, Havas Voyages, Travel Wagonlit , Reisebüro, TUI Reise Center, AAA, - Scripting instruction: Insert market specific examples for appropriate audience	2
Online via a travel website e.g. Expedia, lastminute.com, tripadvisor, booking.com, Priceline, Travelocity, holidaycheck.de, Opodo	3
Other (please specify)	**4**
Don't know/Can't remember	**5**

ASK ALL UK AND OVERSEAS VISITORS EXCEPT THOSE WHO DID NOT BOOK TRAVEL AT Q13 (Code 7 or 8) OR BOOKED A PACKAGE AT Q14

Q16. How did you book the travel from home to your destination in Scotland for this trip? Please select one only

	Code
Through a golf specialist golf tour operator e.g. golfbreaks.com	1
Direct with transport provider e.g. Easyjet, British Airways, Virgin France Compaigne de transport - Brittany Ferries, AirFrance Germany Transportunternehem – Lufthansa, KLM, DFDS Seaways USA transport provider – American Airlines, United, British Airways - Scripting instruction: Insert market specific examples for appropriate audience	2
Through a general tour operator / travel company e.g. Thomson, Thomas Cook, Agence de voyages, Havas Voyages, Travel Wagonlit , Reisebüro, TUI Reise Center, AAA, Scripting instruction: Insert market specific examples for appropriate audience	3
Online via a travel website e.g. Expedia, lastminute.com, tripadvisor, booking.com and Skyscanner	4
Other (specify)	5

I didn't book any travel	6
Don't know/ Can't remember	7

ASK ALL EXCEPT THOSE WHO DID NOT BOOK THIER OWN GOLF (Code 7) AT Q11 OR BOOKED A PACKAGE AT Q14

Q17. How did you book your golf for this trip? Please select all that apply

	Code
Through a golf specialist golf tour operator e.g. golfbreaks.com	1
Through accommodation (e.g. hotel linked to the course)	2
Directly with the course – online	3
Directly with the course – by telephone	4
Directly with the course – visiting in person	5
Other (specify)	6
Unsure – booked by another person	7
Did not book tee times in advance	8
Don't know/Can't remember	9

ASK ALL

Q18. What would be your preferred method/s of booking golf tee times? Please select one only

	Code
Through a golf specialist golf tour operator e.g. golfbreaks.com	1
Through accommodation (e.g. hotel linked to the course)	2
Directly with the course – online	3
Directly with the course – by telephone	4
Directly with the course – visiting in person	5
Other (specify)	6
No preference	7
Unsure	8

ASK ALL

Q19. What methods of transport did you use <u>on the day</u> to get to the golf course(s) that you played at?
Please select all that apply

	Code
Private car	1
Hired car	2
Chauffeur driven car	3
Taxi	4
Public bus	5
Private coach / mini bus	6
Private plane / helicopter	7
Scheduled/chartered plane	8
Train	9
Other, specify_____________	10

ASK ALL OVERNIGHT VISITORS

Q20. What type of accommodation did you stay in during your trip? Please tick all that apply.

	Code
Hotel	1
B&B / Guest House / Restaurant with Rooms	2
Self-catering	3
Air bnb, Couchsurfing, roomorama	4
Hostel	5
Camping	6
Glamping (e.g. Ecopod, Tipi, Yurt)	7
Static caravan	8
Touring caravan / motorhome	9
Second home	10
Friends / family	11
Other (specify) ___________	12

ASK OVERNIGHT VISITORS IF NO AT Q14 – EXCLUDE THOSE WHO DID NOT BOOK ACCOMMODATION THEMSELVES (CODE 7) AT Q12 AND THOSE WHO CODED SECOND HOME OR/AND F&F ONLY AT Q20

Q21. How did you book your accommodation for this trip? Please select all that apply

	Code
Directly with the accommodation on their website	1
Directly with the accommodation by email	2
Directly with the accommodation by telephone	3
Through a golf specialist golf tour operator e.g. golfbreaks.com	4
Through a general tour operator / travel company e.g. Thomson, Thomas Cook, Agence de voyages, Havas Voyages, Travel Wagonlit , Reisebüro, TUI Reise Center, AAA, Scripting instruction: Insert market specific examples for appropriate audience	5
Online via a travel website e.g. Expedia, lastminute.com, tripadvisor, booking.com, Priceline, Travelocity, holidaycheck.de, Opodo	6
At a tourist information centre	7
Online via a peer-to-peer booking site like Airbnb, couchsurfing, roomorama	8
Other (specify)	9
I didn't book any accommodation	10
Don't know	11

ASK ALL OVERNIGHT UNLESS ONLY CODED SECOND HOME OR FRIENDS/FAMILY AT Q20

Q22. And how would you describe the accommodation you stayed in? If you stayed in more than one type of accommodation please tick all that apply.

	Code
Top end / luxury	1
Mid market	2
Budget	3
Unsure/Don't know	4

ASK ALL OVERNIGHT UNLESS ONLY CODED SECOND HOME OR FRIENDS/FAMILY AT Q20

Q23. Did the quality of the accommodation you stayed in meet your expectations? If you stayed in more than one type of accommodation, please answer based on your overall experience

	Code
It exceeded my expectations	1
It met my expectations	2
It was below my expectations	3

ASK ALL

Q24. Did you leave any reviews about the golf course/club you played at in Scotland on a golf review site, TripAdvisor or another review site? Please select all that apply

	Code
Yes, on TripAdvisor	1
Yes, on a golf review site, specify_______	2
Yes other review site (which review site) _____________	3
No	4

Information & Technology

ASK ALL OVERNIGHT VISITORS

Q25. During your golf trip in Scotland, did you use any of the following to find out information relating to your trip (e.g. to check the weather, to look for restaurants, attractions, etc.)? Please select all that apply

	Code
Smartphone (via apps, maps, internet)	1
Tablet (e.g. iPad)	2
Laptop or desktop computer	3
Telephone (to call someone)	4
Talking with someone face-to-face	5
Leaflets	6
Visitor information centre	7
None of these	8
Something else, specify_________	9

ASK ALL

Q26. How satisfied or dissatisfied were you with the following during your trip in Scotland, where 1 = extremely dissatisfied and 10 = extremely satisfied?

	1 = Extremely Dissatisfied	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10 = Extremely Satisfied**	**Unsure / not applicable**
Mobile phone signal coverage	1	2	3	4	5	6	7	8	9	10	11
Availability of 3G / 4G	1	2	3	4	5	6	7	8	9	10	11
Availability of free Wi-Fi	1	2	3	4	5	6	7	8	9	10	11

Your Golfing Experience & Satisfaction

ASK ALL EXCEPT SCOTTISH RESIDENTS

Q27. Thinking about high profile golf events that have taken place in Scotland (e.g. The Open, The 2014 Ryder Cup), to what extent did these events inspire you to take a holiday or short break to play golf in Scotland? Please use the following scale where 1 = did not inspire me at all and 10 = was entirely my inspiration for coming.

	Code
1 = Did not inspire me at all	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9
10 = Was entirely my inspiration for coming	10
Unsure/Don’t know	11

ASK SCOTTISH RESIDENTS ONLY

Q28. Thinking about high profile golf events that have taken place in Scotland (e.g. The Open, The 2014 Ryder Cup), to what extent do these events inspire you to play golf at specific courses in Scotland? Please use the following scale where 1 = Does not inspire me at all and 10 = Completely inspires me.

	Code
1 = Does not inspire me at all	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9
10 = Completely inspires me	10
Unsure/Don't know	11

ASK ALL

Q29. Did your golfing experience meet your expectations? If you played more than one course, please answer based on your overall experience

	Code
It exceeded my expectations	1
It met my expectations	2
It was below my expectations	3

DAYTRIPPERS/SCOTTISH RESIDENTS

Q30. To what extent would you recommend >>INSERT REGION/LOCATION<<<< as a golfing destination to friends and family? **Please rate on a scale of 1 to 10 where 1 is extremely unlikely and 10 is extremely likely.**

OVERSEAS/REST OF UK VISITORS

Q31. To what extent would you recommend Scotland as a golfing destination to friends and family? Please rate on a scale of 1 to 10 where 1 is extremely unlikely and 10 is extremely likely.

	Code
1 = Extremely unlikely to recommend	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9
10 = Extremely likely to recommend	10

ASK ALL

Q32. Thinking of your experience in Scotland overall, to what extent do you agree or disagree with the following statements?

	Disagree Strongly	Disagree Slightly	N/N	Agree Slightly	Agree Strongly	N/A
Scotland is the Home of Golf	1	2	3	4	5	6
Scotland is the perfect stage for hosting world class events	1	2	3	4	5	6
The golf club(s) made me feel very welcome	1	2	3	4	5	6
I experienced excellent caddy service	1	2	3	4	5	6
Scotland offers a good variety of golf courses	1	2	3	4	5	6
Scotland's golf courses are of a high quality	1	2	3	4	5	6
There was plenty to do when I was not golfing	1	2	3	4	5	6

The local people I met during my visit really added to the holiday experience	1	2	3	4	5	6
I experienced excellent customer service	1	2	3	4	5	6
This was one of the best golfing holidays/short breaks I have ever taken **(Overnight visitors only)**	1	2	3	4	5	6
Scotland is a country worth visiting again to play golf **(UK and overseas visitors only)**	1	2	3	4	5	6

ASK ALL OVERNIGHT VISITORS

Q33. What other activities did you undertake in Scotland on your most recent trip?

Please tick all that apply.

Scripting instruction: Please display 3 separate lists on screen under each heading

	Code
Attractions:	
Sightseeing by car/coach/on foot	1
Visited a cathedral, church, abbey or other religious building	2
Visited a historic house, stately home, castle	3
Visited a museum/art gallery	4
Visited a country park/garden	5
Visited a visitor/heritage centre	6
Viewed architecture and buildings	7
Visited a theme/amusement park	8
Visited an aquarium/zoo/safari park/nature reserve	9
Visited a TV/film location	10
Visited cities	11
Activities:	
Went on a guided tour - on foot, bus or other transport	12
Short walk/ stroll - up to 2 miles/ 1 hour	13
Long walk, hike or ramble (minimum of 2 miles/ 1 hour)	14
Centre based walking (i.e. around town centre)	15
Organised adventure sports (whitewater rafting/ sphering/ canyoning/ gorge walking)	16
Sailing/Boating/Watersports	17
Fishing	18

Horse riding, pony trekking	19
Country sports - hunting, shooting etc	20
Watched wildlife, bird watching	21
Cycling - on a road/surfaced path	22
Mountain biking	23
Visited a beach	24
Visited a woodland/forest area	25
Genealogy/tracing ancestors	26
Spa/wellness	27
Shopping	28
Events:	
Music/arts festival	29
Watched a golf event (not on TV)	30
Watched other live sport (not on TV)	31
Went to the theatre	32
Attended an exhibition/fair	33
Attended a live music concert	34
Attended Highland Games	35
Attended ceilidh/traditional music event	36
Attended a personal event such as a wedding, graduation, christening, etc.	37
None of these	38
Other (please specify)	39

OVERNIGHT VISITORS ONLY

Q34. Thinking about the various aspects of your trip, how would you describe the following? Please rate on a scale of 1 to 10 where 1 is very poor and 10 is excellent

	1 = Very Poor	2	3	4	5	6	7	8	9	10 = Excellent	N/A
The quality of local restaurants and cafes	1	2	3	4	5	6	7	8	9	10	11
The quality of non-golfing activities, e.g. sight-seeing, shopping, tourist attractions, etc.	1	2	3	4	5	6	7	8	9	10	11
The quality of tourist information services	1	2	3	4	5	6	7	8	9	10	11
The quality of transport links to the golf course	1	2	3	4	5	6	7	8	9	10	11
The quality of transport links around Scotland	1	2	3	4	5	6	7	8	9	10	11
The overall value for money of your trip	1	2	3	4	5	6	7	8	9	10	11

ASK ALL

Q35. Thinking about all aspects of your trip in Scotland [for Scottish residents please omit 'in Scotland], not just playing golf, how would you rate your overall experience? For Scottish Residents please think about your trip to the area. Please rate on a scale of 1 to 10 where 1 = Very poor and 10 is excellent

	Code
1 = Very poor	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9
10 = Excellent	10

Q36. Why do you say that? OPEN ENDED

____

ASK ALL EXCEPT SCOTTISH RESIDENTS

Q37. How likely is it that you would return for a holiday to Scotland in the next 5 years?
Please rate on a scale of 1 to 10 where 1 = Extremely unlikely and 10 is Extremely likely

	Code
1 = Extremely unlikely	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9

10 = Extremely likely	10
Unsure	11

ASK ALL SCOTTISH RESIDENTS

Q38. How likely is it that you would return for a golfing trip to the area in the next 12 months? Please rate on a scale of 1 to 10 where 1 = Extremely unlikely and 10 is Extremely likely

	Code
1 = Extremely unlikely	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9
10 = Extremely likely	10
Unsure	11

ASK ALL

Q39. Are you aware that The Solheim Cup will be played at Gleneagles in Scotland in 2019?

	Code
Yes, definitely	1
Yes, I think so	2
No	3

ASK ALL

Q40. How likely are you to attend The Solheim Cup in Gleneagles, Scotland in 2019?

	Code
1 = Extremely unlikely	1
2	2
3	3
4	4
5	5
6	6

7	7
8	8
9	9
10 = Extremely likely	10
Unsure	11

ASK ALL

Q41. Apart from the weather, can you suggest anything that would have made your visit better?

____

A little about you

ASK ALL

Q42. How often do you take specific golfing holidays or breaks a year (staying at least 1 night)?

	Code
Never	1
Less than once a year	2
Once a year	3
Twice a year	4
Three times a year	5
Four times a year	6
Five times a year or more	7

ASK ALL

Q43. Which of the following would you say best describes the type of golfing break you most often like to take? Please select one only

	Code
I most often like to take golfing breaks with groups of friends, where socialising and sharing time with them is as important as the golf experience.	1
I most often like to take golfing breaks to top class courses with luxury hotels to enjoy the best courses, facilities, accommodation and restaurants, and have an all round first class experience.	2
I most often like to take golfing breaks as part of a holiday, which includes other activities and may be taken with family and friends who are not golfers.	3
I most often like to take golfing breaks to the most challenging and difficult courses in order to improve my game and compete with friends. The challenge of the course and the opportunity to compete with others (and myself) are paramount.	4
None of these	5

ASK ALL

Q44. Have you ever visited Scotland to attend a golfing event such as The Open, The 2014 Ryder Cup, The Scottish Open, as a spectator?

IF YES AT Q44

Q45. During your trip to attend a golfing event in Scotland, did you play golf as well?

	Q44	Q45
Yes	1	1
No	2	2

PRIZE DRAW

Q46. Would you like to be entered into the prize draw for a chance to win one of five £75 Amazon vouchers?

Please note that your details will ONLY be used to enable us to contact you with regards to the prize draw and you will not be contacted for any other reason or your details used to identify the answers you gave in the survey.

- Yes, Please provide your name and email address to allow us to get in touch.
  Name: ____
  Email address: ____
- No

Profile Card Questionnaire

Q1. Are you... [PLEASE TICK]

Male ☐ Female ☐

Q2. Where do you live? [PLEASE TICK/SPECIFY]

Scotland ☐ Rest of UK ☐ Germany ☐ Sweden ☐

Rest of Europe ☐ Please specify..

USA ☐ Australia ☐ Other, please specify..

Q3. How old are you? [PLEASE TICK]

16-24 ☐ 25-34 ☐ 35-44 ☐ 45-54 ☐ 55-64 ☐ 65-74 ☐ 75+ ☐

Q4. Are you on a... [PLEASE TICK]

Day Trip ☐ Short Break/Holiday ☐ Business Day Trip ☐

Business Overnight Trip ☐

Q5. How many rounds of golf will you play on this trip? [PLEASE SPECIFY]

....

Email address [PLEASE WRITE ONE DIGIT PER BOX]

Appendix D - Technical Appendix

Method

Quantitative

1. The data was collected by a combination of face-to-face interviews, profile cards and online survey
2. The target group for this research study was golf visitors to Scotland
3. The target sample size for face-to-face interviews was 1500 and the final achieved sample size was 1412. The reason for the difference between these two samples was an increase in quieter golf clubs taking part and therefore lower footfall than anticipated
4. All participating courses were asked to distribute profile cards. Many did so, however not all distributed as instructed. 1118 completed cards were received from golf courses.
5. Online survey – 1682 email invitations were successfully sent – 590 completed surveys were received
6. Fieldwork was undertaken between May 2016 – October 2016
7. Face-to-Face Stage: Respondents were selected using random sampling.
8. Email Survey: Respondents to internet self-completion studies are self-selecting and complete the survey without the assistance of a trained interviewer. This means that Progressive cannot strictly control sampling and in some cases, this can lead to findings skewed towards the views of those motivated to respond to the survey.
9. The overall response rate to the email survey was 35%. This is a good response for a survey of this kind. It should be noted that non-response may have an impact on findings should non-responding individuals be different from respondents in any significant or systematic way.
10. The sample represents the target population well. Weighting has been applied to the results to ensure as accurate representation as possible.
11. Email Survey: An incentive of a prize draw (5 chances to win £75 of amazon vouchers) encouraged a positive response to the survey.
12. In total, 25 interviewers worked on face-to-face data collection.
13. Face-to-face Interviews lasted 10-15 minutes.
14. Each interviewer's work was validated as per the requirements of the international standard ISO 20252:
    - Face-to-face - Validation was achieved by re-contacting (by telephone) a minimum of 10% of the sample to check profiling details and to re-ask key questions from the survey. Where telephone details were not available re-contact may have been made by post. All interviewers working on the study were subject to validation of their work.
15. Data gathered using self-completion methodologies was validated using the following techniques:
    - Where a self-completion survey is returned anonymously there will not be any opportunity for validation. However, all questionnaires returned undergo rigorous editing and quality checks and any thought to be invalid were removed from further processing.
16. The economic impact analysis for this project was sub-contracted to SQW
17. All research projects undertaken by Progressive comply fully with the requirements of ISO 20252, the Data Protection Act and the MRS Code of Conduct.

<u>*Data processing and analysis*</u>

1. Data from face-to-face and the online survey were combined.
2. The final combined data set was weighted by month to reflect the original sample plan agreed, region to reflect the figures provided by SQW on number of visitor rounds played in each

region and origin to reflect the face-to-face interviews. The sample base before weighting is 1745, whilst the weighted sample base is 1745.

3. The margin of error on the total data set of 1,745 is between ±2.3% and ±0.5%, calculated at the 95% confidence level (market research industry standard). The margin of error on small base sizes will be larger. For sub-sample analysis, only differences that are statistically significant are reported.
4. The data processing department undertakes a number of quality checks on the data to ensure its validity and integrity.
   - For CAWI questionnaires these checks include:
     - Responses are checked for duplicates where unidentified responses have been permitted.
     - All responses are checked for completeness and sense.
     - Depending on the requirements of the survey, and using the analysis package, SNAP, data is either imported from email responses received in a dedicated email inbox or stored directly on Progressive's dedicated server
   - For CAPI questionnaires these checks include:
     - Responses are checked to ensure that interviewer and location are identifiable. Any errors or omissions detected at this stage are referred back to the field department, who are required to re-contact interviewers to check.
     - Using the analysis package, SNAP, data received via over-the-air synchronisation is imported from Progressive's dedicated server.
5. A computer edit of the data carried out prior to analysis involves both range and inter-field checks. Any further inconsistencies identified at this stage are investigated by reference back to the raw data on the questionnaire.
6. Where 'other' type questions are used, the responses to these are checked against the parent question for possible up-coding.
7. Responses to open-ended questions will normally be spell and sense checked. Where required these responses may be grouped using a code-frame which can be used in analysis.
8. A SNAP programme was set up with the aim of providing the client with useable and comprehensive data. Cross-breaks were discussed with the client in order to ensure that all information needs are met.

Appendix E – SQW Report

Scottish Golf Visitor Survey and Economic Impact

Economic Value of Golf Tourism – Final Report

March 2017

SQW

Contents

Executive Summary 1

1. Introduction 2

2. Survey results 3

3. Economic analysis 10

4. Overall value of golf tourism 15

Annex A: Survey approach & sample profile A-1

Contact:	John Nolan	Tel:	0131 225 4007	email:	jnolan@sqw.co.uk

Executive Summary

Approach

1. SQW was commissioned to measure the economic value of golf tourism in Scotland. The research involved a survey of all golf courses to collect information on visitor green fees. This survey provided data for 205 courses (37% of all courses) and could then be scale up to remaining non-survey courses.

2. Overall golf visitor expenditure was calculated for Scotland and across eight key golfing destinations using ratios of green fees to total golf trip expenditure (provided by Progressive's face-to-face survey of golf visitors). As well as visitor spend, the analysis also factored in the additional expenditure generated by hosting major golf events. The analysis then used Scottish Government Input Output Tables to estimate output, employment and GVA impacts.

Value of golf tourism

3. The economic value of golf tourism in Scotland combines the expenditure of staying golf visitors and the impact of hosting golf events. It does not include day visitors as it is assumed that the vast majority of this spend will be displaced from elsewhere in the Scottish economy.

4. **Overall, the economic value of golf tourism for the Scottish economy is £286 million in output, 4,700 jobs and £154 million in GVA. The scale of output has increased by £66 million since the last study which used data from 2008. This represents growth of 30% or 4.3% per annum.**

5. Estimates for the value of golf tourism in Scotland's regions have been calculated using the regional spend figures from staying visitors and day visitors (excluding those visitors who live within 30 miles of the course). The regional analysis does not include the impact of events or any multiplier effects. The top regions in terms of golf tourism are Fife (£52m direct output), Highlands (£23m), East Lothian (£22m) and Carnoustie Country (£20m). These results highlight the importance of golf tourism as an economic driver in many parts of rural Scotland.

6. Golf tourism in Scotland continues to be concentrated around the higher profile courses. There are 72 courses with visitor green fees of more than £150k and collectively they account for 82% of all visitor green fees in Scotland.

1. Introduction

1.1 In April 2016, Progressive Partnership and SQW were commissioned by VisitScotland and Scottish Enterprise to profile golf tourism in Scotland. SQW's role was to measure the economic value of golf tourism. Research produced by SQW in 2009 estimated that golf tourism was worth £220 million in economic output and £120 million in GVA (Gross Value Added).

1.2 This new study sought to undertake a similar approach to the economic analysis but at the same time ensuring more robust estimates, specifically in relation to scaling up visitor expenditure from green fees to total trip expenditure.

1.3 The agreed approach for valuing golf tourism in Scotland was as follows:

- A survey of all 557 golf courses in Scotland – this involved an e-survey using contact details provided by Scottish Golf, followed up with a telephone survey to ensure representative feedback from different types of courses (links/ inland and scale of visitor green fees) and geography
- Scaling up survey results on visitor green fee expenditure to populate a database of all golf courses in Scotland
- Using ratios of expenditure on green fees to total golf trip expenditure (provided by Progressive's face to face survey of golf visitors) to calculate overall golf visitor expenditure in Scotland and across eight key golfing destinations
- Estimating typical annual impact of hosting golf events
- Using Scottish Government Input Output Tables to estimate output, employment and GVA impacts.

1.4 Section 2 of this report summarises the feedback from the survey of courses and provides an estimate of visitor green expenditure for all courses in Scotland based on 2015 figures. Section 3 then incorporates the data from Progressive's survey to provide estimates of total day and visitor expenditure across Scotland and the key golfing destinations. It also outlines the estimated impact from the hosting of major golf events. Finally, Section 4 described the approach to estimating overall output, employment and GVA impact.

2. Survey results

2.1 The following sections are based on survey feedback from 205 of the 557 courses in Scotland.

Visitor green fees

2.2 Over a fifth (22%) of the 205 courses surveyed reported visitor green fees of more than £150k per annum. Out of these 44 courses generating higher levels of visitor spend, 33 of these courses are links courses. In terms of the 26 courses generating over £300k, 23 are links courses.

Table 2-1: Visitor green fee income by links/ inland profile

	Links	Inland	9 hole	Total	% of total
< £150k	32	95	34	161	78%
£150k-£300k	10	8	0	18	9%
£300k+	23	3	0	26	13%
Total	**65 (32%)**	**106 (52%)**	**34 (16%)**	**205**	**100%**

Source: SQW

2.3 The total value of visitor green fees reported across the survey sample was around £37 million (including both staying and day visitors). Just under three-quarters of this spend was recorded at links courses, with a further quarter (25%) taking place at inland courses. Nine hole courses accounted for the remaining green fee spend (2%).

Table 2-2: Visitor green fee income of survey sample

	Visitor green fee income (£)				
	Links	**Inland**	**9 hole**	**Total**	**% of total**
< £150k	2,015,000	3,935,000	829,000	6,779,000	18%
£150k-£300k	2,154,000	1,829,000	0	3,983,000	11%
£300k+	22,703,000	3,459,000	0	26,162,000	71%
Total	26,872,000 (73%)	9,222,000 (25%)	829,000 (2%)	36,924,000	100%

2.4 The survey sample included a good spread of courses from around Scotland. Unsurprisingly given the importance of the St Andrews courses, the highest proportion of larger visitor courses is found in Fife (13 of the 44 courses generating more than £150k in visitor green fees). Focusing on those courses with more than £300k in visitor green fee income, the top areas are Fife, Ayrshire & Arran and East Lothian.

Table 2-3: Regional location of survey sample

	< £150k	£150k-£300k	£300k+	All	% of total
Aberdeen City & Shire	15	0	2	17	8%
Ayrshire & Arran	18	2	4	24	12%
Carnoustie Country*	9	0	2	11	5%

	< £150k	£150k-£300k	£300k+	All	% of total
East Lothian	6	3	4	13	6%
Fife	10	4	9	23	11%
Highlands	21	2	2	25	12%
Perthshire	10	2	3	15	7%
South of Scotland	15	1	0	16	8%
Other	57	4	0	61	30%
Total	**161 (78%)**	**18 (9%)**	**26 (13%)**	**205**	**100%**

*Source: SQW * Note: Carnoustie Country only includes Angus courses*

Visitor rounds

2.5 Respondents were asked to provide figures for the total number of visitor rounds in 2015, making it clear that where actual figures were not available rough estimates would be acceptable.

2.6 A total of 742,980 visitor rounds were reported across the survey sample, with just under a third (29%) taking place at golf courses in Fife. Around 13% of all visitor rounds were at courses in Ayrshire & Arran, with 10% at courses in East Lothian and Perthshire respectively. Approximately one in ten visitor rounds (12%) took place at courses in 'other' Scottish regions.

2.7 Just under half (47%) of all rounds recorded by survey respondents were at courses with green fee revenue of over £300k. A third (35%) of visitors rounds were at courses with green fee expenditure of less than £150k and a fifth (18%) at courses with revenues of £150k-£300k.

Table 2-4: Breakdown of visitor rounds of survey sample (%)

	< £150k		£150k-£300k		£300k+		All	
	No.	**%**	**No.**	**%**	**No.**	**%**	**No.**	**%**
Aberdeen City & Shire	28,990	11%	0	0%	16,300	5%	45,290	6%
Ayrshire & Arran	42,470	16%	32,790	24%	24,660	7%	99,920	13%
Carnoustie Country*	8,870	3%	0	0%	56,000	16%	64,870	9%
East Lothian	17,220	7%	19,050	14%	35,370	10%	71,640	10%
Fife	28,800	11%	37,610	28%	148,030	43%	214,440	29%
Highlands	21,590	8%	12,870	10%	18,660	5%	53,120	7%
Perthshire	15,630	6%	8,500	6%	48,600	14%	72,740	10%
South of Scotland	19,730	8%	12,000	9%	0	0%	31,730	4%
Other	76,780	30%	12,450	9%	0	0%	89,230	12%
Total	**260,080**	**100%**	**135,270**	**100%**	**347,620**	**100%**	**742,980**	**100%**

*Source: SQW survey – base: 148 courses * Note: Carnoustie Country only includes Angus courses*

Change in visitor green fees

2.8 When asked how the value of visitor green fees has changed over the last five years, **30% of respondents reported that they had remained roughly the same. Four of out of ten courses stated that the value of visitor green fees had increased.** This proportion was higher for those courses with green fee expenditure of £150k-£300k (50%) and over £300k (56%). **In contrast, 28% of respondents reported that the value of green fees had fallen during the period**.

Table 2-5: How has the value of visitor green fees changed over the last 5 years?

	< £150k	£150k – £300k	£300k	All
Down by more than 30%	3%	0%	0%	2%
Down by 20-30%	8%	5%	0%	6%
Down by 5-10%	21%	25%	9%	20%
Roughly the same	31%	20%	35%	30%
Up by 5-10%	24%	40%	39%	28%
Up by 20-30%	5%	10%	13%	6%
Up by more than 30%	8%	0%	4%	6%
Total	**100%**	**100%**	**100%**	**100%**

Source: SQW survey – base: 174 courses

Country/ overseas members

2.9 Of those golf courses surveyed, well over half (58%) have country members and over a third (36%) have overseas members. The proportion of courses with country members is highest in those with green fee revenues of less than £150k (62%). Unsurprisingly, this type of course has the lowest proportion of overseas members (33%). Around half (52%) of courses with green fee expenditure exceeding £300k have overseas members.

Table 2-6: Do you have any country or overseas members?

	% of courses stating yes	
	Country	Overseas
< £150k	62%	33%
£150k-£300k	35%	40%
£300k+	48%	52%
All	**58%**	**36%**

Source: SQW survey – base: 184 courses

2.10 Respondents were also asked how many country and overseas members they have, and on average, how many rounds they would typically play each year. An average of 12 rounds was reported for country members and six rounds for overseas members across all types of golf course. Country and overseas members would typically play a higher number of rounds each year at courses with green fee revenues of less than £150k.

Table 2-7: How many country/overseas members do you have and how many rounds would they typically play each year?

	Country members	Country rounds	Average	Overseas members	Overseas rounds	Average
< £150k	1,650	24,480	15	420	3,490	8
£150k-£300k	550	6,950	13	310	1,820	6
£300k+	1,040	7,430	7	460	1,610	3
All	**3,240**	**38,860**	**12**	**1,190**	**6,920**	**6**

Source: SQW survey – country base: 95
overseas base: 62

Markets

2.11 Around 30% of all visitors across courses in Scotland live in the local area (defined as within 30 miles of the course). This is higher for those courses with green fee revenues of less than £150k (48%) and £150k-£300k (39%). Just 14% of visitors at courses with green fee expenditure of over £300k live in the local area.

Table 2-8: Can you estimate the proportion of your visitors that live in the local area?

	% of visitors that live in the local area
< £150k	48%
£150k-£300k	39%
£300k+	14%
All	**30%**

Source: SQW survey – base: 137 courses

2.12 In order to get an idea of the spread of green fee spend across different markets, survey respondents were asked to estimate the proportion of their visitors from selected geographic areas. **Across all courses, 51% of visitors are from Scotland, 22% from the rest of the UK and 27% from other international markets.**

2.13 For courses with green fee revenue of less than £150k and £150k-£300k, the majority of visitors are from Scotland (66% and 62% respectively). In contrast, Scottish golfers account for just over a third (36%) of visitors at courses with green fee expenditure in excess of £300k. International visitors (41%) are much more common at this type of course.

Table 2-9: Can you estimate the proportion of visitors from the following markets?

	< £150k	£150k-£300k	£300k+	All
Scotland	66%	62%	36%	51%
Rest of the UK	18%	26%	23%	22%
International	15%	12%	41%	27%
Total	**100%**	**100%**	**100%**	**100%**

Source: SQW survey – base: 148 courses

2.14 Respondents were then asked to break down their international visitors by market. **The majority of international visitors across all courses are from North America (58%), with this proportion higher (64%) for those courses with green fee revenue of over**

£300k. Around 18% of visitors are from Mainland Europe and 10% from Scandinavia. The remaining visitors are fairly evenly spread across other international markets.

Table 2-10: Where do your international visitors come from?

	< £150k	£150k – £300k	£300k	All
Ireland	6%	6%	4%	4%
Mainland Europe	26%	23%	16%	18%
Scandinavia	13%	17%	8%	10%
North America	42%	43%	64%	58%
Australia and NZ	5%	4%	3%	3%
Asia	4%	2%	4%	4%
Other	4%	5%	2%	3%
Total	**100%**	**100%**	**100%**	**100%**

Source: SQW survey – base: 121 courses

Staying and Day Visitors

2.15 To accurately estimate the value of both day and staying visitors, courses were asked what proportion of their Scottish and rest of the UK visitors stay overnight. It is estimated that the vast majority (79%) of rest of the UK visitors typically stay overnight – this proportion is higher for those courses with green fee expenditure of £150k-£300k (86%) and over £300k (80%). Respondents felt that a fifth (21%) of Scottish visitors would be staying overnight. Again, this is more common for those courses with higher green fee revenues.

Table 2-11: What proportion of your Scottish/ Rest of UK visitors do you think will stay overnight?

	Scotland	Rest of UK
< £150k	15%	74%
£150k-£300k	24%	86%
£300k+	28%	80%
All	**21%**	**79%**

Source: SQW survey – base: 142 courses

Bookings

2.16 The most common method for booking rounds across all courses is by direct email or telephone contact (51%). A quarter (24%) of rounds are booked using a course's own online booking system, with 9% of bookings made through other third party websites (e.g. Tee Off Times). Around 8% of bookings are made through a golf tour operator – this proportion is significantly higher for those courses with green fee revenue in excess of £300k (28%).

Table 2-12: How do visitors usually book rounds at your course?

	< £150k	£150k – £300k	£300k +	All
Using your own online booking system	22%	26%	34%	24%
Contacting direct by email or telephone	53%	52%	35%	51%
Using third party websites (e.g. Tee Off Times)	10%	8%	2%	9%
Through a golf tour operator	5%	9%	28%	8%
Other	10%	5%	1%	8%
Total	**100%**	**100%**	**100%**	**100%**

Source: SQW survey – base: 166 courses

Total Visitor Green Fee Expenditure

2.17 Using the data collected as part of this survey, average green fees were calculated for each category (e.g. < £25k, £25-£75k, £75k-£150k, £150k - £300k, £300k+) and applied to those courses who did not respond to the survey. Representative category splits of day and staying visitors were also used in order to scale up survey results and populate a full database of all 557 golf courses in Scotland.

2.18 **It is estimated that there was just over £56 million spent on visitor green fees in Scotland in 2015. Around £32 million (57%) of this was from staying golfers, with golf day visitors accounting for the remaining £24 million (43%).**

Table 2-13: Total visitor green fee spend for all courses in Scotland

	Total annual visitor green fees (£)	Day trip: staying visitor split	Day trip visitor green fees (£)	Staying visitor green fees (£)
Links, < £150k	4,401,000	47%: 53%	2,089,000	2,312,000
Links, £150k-£300k	3,261,000	35%: 65%	1,148,000	2,113,000
Links, £300k+	24,874,000	20%: 80%	5,093,000	19,781,000
Inland, < £150k	11,708,000	79%: 21%	9,291,000	2,418,000
Inland, £150-£300k	5,811,000	58%: 42%	3,355,000	2,456,000
Inland, £300k+	4,183,000	50%: 50%	2,091,000	2,091,000
9 hole courses	2,249,000	50%: 50%	1,126,000	1,123,000
Total	**56,487,000**	**43%: 57%**	**24,193,000**	**32,294,000**

Source: SQW

2.19 The total value of visitor green fees continues to be concentrated around the higher profile courses. **There are 72 courses with visitor green fees of more than £150k and collectively they account for 82% of all visitor green fees in Scotland.**

2.20 A regional breakdown of both staying and day visitors' expenditure is provided below. **The highest level of staying visitor green fee expenditure is estimated to be in Fife with around £9.6 million. Perthshire has a slightly higher day visitor green fee expenditure compared to Fife at £2.7 million.**

Table 2-14: Breakdown of visitor green fees spend by type and origin of visitor

	Day Visitors		Staying Visitors						
	Day visitor green fee spend including local area (£)	Day visitor green fee spend excluding local area (£)	Total staying visitor green fee spend (£)	Scotland (£)	Rest of the UK (£)	All UK (£)	North America (£)	Other international (£)	All international (£)
Aberdeen City & Shire	2,494,000	1,491,000	2,341,000	503,000	514,000	1,017,000	651,000	673,000	1,324,000
Ayrshire & Arran	2,310,000	1,205,000	2,926,000	389,000	623,000	1,012,000	1,213,000	702,000	1,914,000
Carnoustie Country*	1,304,000	902,000	3,891,000	259,000	1,025,000	1,284,000	2,270,000	336,000	2,607,000
East Lothian	1,680,000	1,383,000	3,790,000	379,000	960,000	1,339,000	1,496,000	955,000	2,451,000
Fife	3,533,000	2,610,000	9,557,000	1,331,000	1,899,000	3,229,000	4,699,000	1,628,000	6,327,000
Highlands	2,584,000	1,546,000	4,018,000	793,000	1,189,000	1,982,000	1,089,000	946,000	2,035,000
Perthshire	3,648,000	2,713,000	2,509,000	647,000	837,000	1,485,000	331,000	693,000	1,025,000
South of Scotland	1,320,000	789,000	928,000	307,000	444,000	751,000	55,000	123,000	178,000
Other	5,321,000	2,705,000	2,334,000	754,000	894,000	1,648,000	207,000	479,000	686,000
Total	**24,193,000**	**15,344,000**	**32,294,000**	**5,362,000**	**8,385,000**	**13,747,000**	**12,011,000**	**6,536,000**	**18,547,000**

*Source: SQW * Note: Carnoustie Country only includes Angus courses*

3. Economic analysis

3.1 There are three areas of income which contribute to the overall value of the golf tourism:

- Staying visitors expenditure – the analysis considers the value for Scotland and in each of the eight main golfing regions
- Day visitors – data is presented for each of the golfing regions but not at the Scotland level as it is assumed that the vast majority of this spend will be displaced from elsewhere in the Scottish economy
- Golf events – the impact of these events is provided for the Scotland-level analysis.

Scaling up from green fees to total spend

3.2 The previous section highlighted the estimates of green fees expenditure by both staying and day visitors. The face-to-face survey of golf visitors undertaken by Progressive collected spend information on both green fees and the visitors' trip as a whole. The table below shows the results broken down by the main golf visitor geographic markets. Staying visitors were also asked whether golf was the main purpose of their trip, with 79% of golf visitors stating this was the case. This was used in the analysis by including 79% of the difference between spend on golfing days and the trip as a whole.

Table 3-1: Breakdown of visitor green fees as proportion of total trip spend by origin of visitor

	Survey base	Total green fee spend (£)	Total expenditure by golf visitors (£)	Greens fees as proportion of total trip spend
Scotland	136	12,140	72,030	17%
Rest of UK	110	26,960	102,130	26%
All UK	246	39,100	174,170	22%
North America	94	76,260	352,330	22%
Other International	68	24,280	150,360	16%
All International	162	100,530	502,690	20%
All staying visitors	408	139,630	676,860	21%

Source: Golf Visitor Survey undertaken by Progressive

Staying visitors

3.3 The table below uses the above ratios to calculate the total spend made in Scotland by staying visitors and then in each of the key golfing destinations. **The total direct impact of golf tourism for Scotland as a whole based on staying visitors is estimated to be £154.4 million. The highest regional spend is Fife with an estimated £45.4 million.**

Table 3-2: Staying visitor spend by region and origin of visitor

	Staying visitor spend by origin (£)				
	Scotland	**Rest of UK**	**N. America**	**Other international**	**All staying**
Scotland					
Green fee spend	5,362,000	8,385,000	12,011,000	6,536,000	32,294,000
Total trip spend	30,998,000	31,039,000	53,676,000	38,716,000	154,429,000
Aberdeen City & Shire					
Green fee spend	503,000	514,000	651,000	673,000	2,341,000
Total trip spend	2,908,000	1,901,000	2,908,000	3,988,000	11,705,000
Ayrshire & Arran					
Green fee spend	389,000	623,000	1,213,000	702,000	2,926,000
Total trip spend	2,251,000	2,305,000	5,420,000	4,156,000	14,131,000
Carnoustie Country*					
Green fee spend	259,000	1,025,000	2,270,000	336,000	3,891,000
Total trip spend	1,498,000	3,793,000	10,146,000	1,992,000	17,430,000
East Lothian					
Green fee spend	379,000	960,000	1,496,000	955,000	3,790,000
Total trip spend	2,191,000	3,555,000	6,686,000	5,656,000	18,088,000
Fife					
Green fee spend	1,331,000	1,899,000	4,699,000	1,628,000	9,557,000
Total trip spend	7,693,000	7,029,000	20,998,000	9,647,000	45,367,000
Highlands					
Green fee spend	793,000	1,189,000	1,089,000	946,000	4,018,000
Total trip spend	4,584,000	4,403,000	4,866,000	5,607,000	19,460,000
Perthshire					
Green fee spend	647,000	837,000	331,000	693,000	2,509,000
Total trip spend	3,742,000	3,100,000	1,481,000	4,106,000	12,429,000
South of Scotland					
Green fee spend	307,000	444,000	55,000	123,000	928,000
Total trip spend	1,773,000	1,644,000	245,000	729,000	4,390,000
Other					
Green fee spend	754,000	894,000	207,000	479,000	2,334,000
Total trip spend	4,358,000	3,310,000	926,000	2,836,000	11,429,000

*Source: SQW * Note: Carnoustie Country only includes Angus courses*

3.4 As shown above, around £31 million of this expenditure is made by Scottish staying visitors. The agreed methodology was to include all of their expenditure and this approach has also been used in other recent tourism sector research (e.g. on Scotland's sailing tourism and mountain-biking markets). It may be the case that without golf courses in Scotland, these visitors would have spent their money on some other activity in Scotland. Equally, they may have decided to play golf outside Scotland and this would is backed up by the high proportion of visitors saying golf was the main purpose of their visit. It would be very difficult to get a meaningful response from visitors on this hypothetical question. Whilst this issue of potential displacement is an important part of assessing the impact of interventions, the purpose of this study is to assess the current value of the golf tourism sector to the Scottish economy[1].

Day visitors

3.5 Using the ratio for day visitor spend on green fees to total trip spend, the table below sets out the spend figures for each of the eight golfing regions across Scotland (and the rest of the country). This does not include the spend by those visitors that live within 30 miles of the course as this is assumed to be displacement. **The highest level of day visitor expenditure is in Perthshire with £6.6 million.**

Table 3-3: Staying visitor spend by region

	Day visitor spend excluding local area (£)
Aberdeen City & Shire	
Green fee spend	1,491,000
Total trip spend	3,626,000
Ayrshire & Arran	
Green fee spend	1,205,000
Total trip spend	2,930,000
Carnoustie Country*	
Green fee spend	902,000
Total trip spend	2,193,000
East Lothian	
Green fee spend	1,383,000
Total trip spend	3,362,000
Fife	
Green fee spend	2,610,000
Total trip spend	6,345,000
Highlands	
Green fee spend	1,546,000
Total trip spend	3,759,000
Perthshire	
Green fee spend	2,713,000

[1] By way of illustration, if it was assumed that 25% of the Scottish staying visitor spend was displacement from other parts of the economy, this would reduce the direct output value of golf tourism from £154.4 million to £146.7 million

	Day visitor spend excluding local area (£)
Total trip spend	6,595,000
South of Scotland	
Green fee spend	789,000
Total trip spend	1,918,000
Other	
Green fee spend	2,705,000
Total trip spend	6,576,000

*Source: SQW * Note: Carnoustie Country only includes Angus courses*

Golf events

3.6 Another important area of economic impact is the range of major golf events hosted in Scotland. These events attract players, event organisers, media and spectators from all over the world. The expenditure of the event organisers and the spectators generates demand in the Scottish economy, from businesses directly involved in the event through to local tourism businesses benefiting from additional visitors' expenditure during the course of the event.

3.7 The most important event is the Open Championship, which is regularly held in Scotland. The 2013 event at Muirfield generated over £42 million for the Scottish economy[2]. The impact when the event is held at St Andrews is always higher and the 2015 Open generated nearly £88 million in economic impact[3]. The impact of the 2016 Open at Royal Troon is estimated to have been £64 million[4].

3.8 **In 2014, Scotland also hosted the Ryder Cup at Gleneagles which generated an estimated £106 million for the Scottish economy. However, this was a one-off event and has not been included in the annual average value of hosting golfing events in Scotland.**

3.9 There are a range of other golf events which also contribute to the overall impact such as the Senior Open Championships, the Scottish Open and the Women's British Open. Some of these are held annually but not all of them. In order to calculate an average annual impact figure, we have looked at a four-year period from 2012 to 2015. Where economic impact reports are available, these figures have been used. For some of the smaller events, we have included an estimate based on the scale/ profile of the event and number of likely visitors.

3.10 The table below sets out the economic impact figures for the main events regularly held in Scotland. **The figures do not include multiplier effects** and do not include any estimates that regarding the value of the media coverage. Based on these figures, **it is estimated that the average annual net direct impact for Scotland hosting these types of events is £29 million**.

2 Sheffield Hallam (2013), Economic Impact of the Open Championship
3 Sheffield Hallam (2015), Economic Impact of the Open Championship
4 Sheffield Hallam (2016), Economic Impact of the Open Championship

Table 3-4: Calculating average annual impact of golf events in Scotland (£m, excl multipliers)

Event	2012	2013	2014	2015	Annual average 2012-15
The Open Championship (Muirfield - 2013, St Andrews - 2015)		25.3		52.4	
Senior Open Championship (Turnberry - 2012)	0.6				0.6
Scottish Open (Castle Stuart - 2012/13, Royal Aberdeen - 2014, Gullane - 2015)	3.0	3.0	3.0	3.0	3.0
Women's British Open 2013 (St Andrews - 2013, Trump Turnberry - 2015)		3.1		2.0	
Ladies Scottish Open 2007 (Archerfield - 2012-14, Dundonald - 2015)	0.3	0.3	0.3	0.3	0.3
Alfred Dunhill Championships (St Andrews/ Kingsbarns/ Carnoustie)	3.0	3.0	3.0	3.0	3.0
Scottish Senior Open (Fairmont St Andrews - 2012-14, Archerfield - 2015)	0.6	0.6	0.6	0.6	0.6
SSE Scottish Hydro Challenge (Macdonald Spey Valley)	0.3	0.3	0.3	0.3	0.3
Curtis Cup (Nairn)	0.6				0.6
Johnnie Walker Championship (Gleneagles)	1.0	1.0			1.0
Paul Lawrie Matchplay (Murcar)				0.6	
Total	9.4	36.6	7.2	62.2	9.4

Source: SQW

4. Overall value of golf tourism

Scotland

4.1 The economic value of golf tourism in Scotland combines the expenditure of staying golf visitors and the impact of hosting golf events. It does not include day visitors as it is assumed that the vast majority of this spend will be displaced from elsewhere in the Scottish economy.

4.2 The analysis set out below uses the staying visitor and event expenditure together with sector data from the Scottish Government Input-Output Tables to calculate economic output which includes the indirect and induced multiplier effects in the Scottish economy. This can then be used to produce GVA and employment impact figures[5]. **The value of staying golf visitors is therefore £241 million in output, just under 4,000 jobs and £130 million in GVA. The impact of golf events is £44 million in output, around 700 jobs and £23 million in GVA.**

4.3 **Overall, the economic value of golf tourism for the Scottish economy is £286 million in output, 4,700 jobs and £154 million in GVA.** The scale of output has increased by £66 million since the last study which used data from 2008. This represents growth of 30% or 4.3% per annum.

Table 4-1: Calculating output, employment and GVA impacts for Scotland from staying visitors

	Expenditure £m	Output multiplier	Output £m	Employ-ment effect	Employ-ment	GVA effect £m	GVA
Staying visitor green fees	32.3	1.68	54.4	28.12	908	0.96	30.93
Other trip spend	122.1	1.53	187.0	24.93	3045	0.82	99.66
Staying visitor total	**154.4**		**241.4**		**3,953**		**130.6**
Events	28.9	1.53	44.2	24.93	719	0.82	23.5
Total incl Events	**183.3**		**285.6**		**4,672**		**154.1**

Source: SQW analysis using Scot Gov Input-Output tables

Regions

4.4 Estimates for the value of golf tourism in Scotland's regions have been calculated using the regional spend figures from staying visitors and day visitors (excluding those visitors who live within 30 miles of the course). The impact of events has not been included in the regional analysis.

4.5 The analysis below has not sought to estimate total output including the multiplier effects since there are no suitable data available (Input-Output Tables are only available at the Scotland level). However, it is possible to estimate the employment and GVA generated by the direct expenditure in each of the local economies. Visitor expenditure can be converted into

[5] Two industry categories have been used from the Input-Output Tables. SIC 93 (Sports and Recreation) has been used for calculating the impact from staying visitors' green fees expenditure. SIC 55/ SIC 56 has been used for other visitor spend (primarily in tourism-related sectors)

employment and GVA impacts by using data from the Scottish Annual Business Survey for tourism-related industries in the relevant local authority areas.

Table 4-2: Regional impacts of golf tourism

	Direct expenditure £m	Employment	GVA £m
Aberdeen City & Shire			
Staying visitors	11.7	275	7.0
Day visitors	3.6	85	2.2
Total economic impact	15.3	360	9.2
Ayrshire & Arran			
Staying visitors	14.1	362	7.5
Day visitors	2.9	75	1.6
Total economic impact	17.1	437	9.0
Carnoustie Country*			
Staying visitors	17.4	771	9.4
Day visitors	2.2	97	1.2
Total economic impact	19.6	868	10.6
East Lothian			
Staying visitors	18.1	535	10.9
Day visitors	3.4	99	2.0
Total economic impact	21.5	635	12.9
Fife			
Staying visitors	45.4	1,581	25.0
Day visitors	6.3	221	3.5
Total economic impact	51.7	1,802	28.4
Highlands			
Staying visitors	19.5	539	11.3
Day visitors	3.8	104	2.2
Total economic impact	23.2	643	13.5
Perthshire			
Staying visitors	12.4	341	6.8
Day visitors	6.6	181	3.6
Total economic impact	19.0	521	10.5
South of Scotland			
Staying visitors	4.4	121	2.5
Day visitors	1.9	53	1.1
Total economic impact	6.3	173	3.5

	Direct expenditure £m	Employment	GVA £m
Other			
Staying visitors	11.4	322	6.4
Day visitors	6.6	185	3.7
Total economic impact	18.0	507	10.1

*Source: SQW * Note: Carnoustie Country only includes Angus courses*

Annex A: Survey approach & sample profile

Survey approach

A.1 There were two stages to the survey of golf courses. First, we conducted an e-survey via email with all 557 registered golf courses in Scotland. This survey was deliberately kept short to encourage maximum response and asked courses to provide figures on total visitors rounds and green fees the split between day and staying visitors, and the origin of visitors. Reminders were regularly administered using our online survey software package, SmartSurvey, in order to boost the response rate.

A.2 The results of this e-survey were broken down to provide a profile of respondents by type of course and green fee value across the different regions in Scotland. This informed the second stage of our survey approach. Using this analysis, we carried out follow-up calls with those courses yet to respond to ensure we had a representative sample to conduct our assessment. In total, 205 golf courses completed the survey.

Sample profile

A.3 The tables below show that the sample of courses in the survey sample are broadly representative of all courses in Scotland. Generally, the sample was weighted towards the larger links courses where more golf visitors tend to play

- In terms of the survey sample, a third (32%) are links courses and just over half (52%) inland. For Scotland as a whole, a fifth (20%) are links course and 56% are inland. The remainder are 9 hole courses
- Over a fifth (22%) of the sample included larger courses generating over £150k in visitor green fees. Around 13% of all courses fall into this category in terms of visitor green fee spend.

Table A-1: Links/ inland profile for survey sample

	Links	Inland	9 hole	Total	% of total
< £150k	32	95	34	161	78%
£150-£300k	10	8	0	18	9%
£300k+	23	3	0	26	13%
Total	**65 (32%)**	**106 (52%)**	**34 (16%)**	**205**	**100%**

Source: SQW

Table A-2: Links/ inland profile for all courses

	Links	Inland	9 hole	Total	% of total
< £150k	70	282	133	485	87%
£150-£300k	15	26	1	42	8%
£300k+	26	4	0	30	5%
Total	**111 (20%)**	**312 (56%)**	**134 (24%)**	**557**	**100%**

Source: SQW

A.4 The survey sample is also broadly reflective of the geographic spread of all courses in Scotland. The tables below show the size (in terms of visitor green fee income) and location of courses in the sample of wider population in each of the key golfing destinations.

Table A-3: Regional location of survey sample

	< £150k	£150k-£300k	£300k+	All	% of total
Aberdeen City & Shire	15	0	2	17	8%
Ayrshire & Arran	18	2	4	24	12%
Carnoustie Country*	9	0	2	11	5%
East Lothian	6	3	4	13	6%
Fife	10	4	9	23	11%
Highlands	21	2	2	25	12%
Perthshire	10	2	3	15	7%
South of Scotland	15	1	0	16	8%
Other	57	4	0	61	30%
Total	**161 (78%)**	**18 (9%)**	**26 (13%)**	**205**	**100%**

*Source: SQW * Note: Carnoustie Country only includes Angus courses*

Table A-4: Regional location of all courses

	< £150k	£150k-£300k	£300k+	All	% of total
Aberdeen City & Shire	47	4	2	53	10%
Ayrshire & Arran	40	3	4	47	8%
Carnoustie Country*	19	2	2	23	4%
East Lothian	10	5	6	21	4%
Fife	35	5	9	49	9%
Highlands	70	5	3	78	14%
Perthshire	29	5	3	37	7%
South of Scotland	49	3	0	52	9%
Other	186	10	1	197	35%
Total	**485 (87%)**	**42 (8%)**	**30 (5%)**	**557**	**100%**

*Source: SQW * Note: Carnoustie Country only includes Angus courses*