Golf Tourism in Perth and Kinross: An Assessment of its Growth Potential to 2020

Final report to Perth and Kinross Council and Scottish Enterprise

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PERTH & KINROSS COUNCIL

Scottish Enterprise

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1. Introduction

1.1 In December 2012, SQW was commissioned by Perth and Kinross Council and Scottish Enterprise to undertake research on the golf tourism sector in Perth and Kinross and to assess its growth potential to 2020. The Ryder Cup at Gleneagles in 2014, combined with the Open taking place in Scotland three of the next four years (Muirfield in 2013, St Andrews in 2015 and Troon in 2016), is likely to mean increased interest in golf tourism and there is clearly an opportunity to promote Perth and Kinross on the back of the Ryder Cup. In addition, the area is set to benefit from new investment in golf resorts over the coming years which will also bring in new golf visitors.

1.2 In this context, the Council and Scottish Enterprise decided to commission this research to provide an overview of the sector and how it might grow in the future. Feedback from this study has also been used to inform the consultation exercise being carried out by the Golf Tourism Development Group (Scottish Enterprise, VisitScotland, Scottish Golf Union, Golf Tourism Scotland) on the new Scottish Golf Tourism Strategy. New golf development groups have recently been created in other parts of the country and the purpose of this research was to assess whether there was sufficient demand in Perth and Kinross for a similar type of group.

Research aims

1.3 The aims of the research as set out in the brief were as follows:

- carry out an audit and review of the existing golf tourism sector in Perth and Kinross, identifying its value (including employment and visitor numbers) and economic impact;
- assess new golf course development projects in the area and identify their potential economic impact in terms of employment, visitor expenditure etc;
- benchmark the areas future growth prospects with those of other regional golfing destinations in Scotland;
- review the local value golf ticket schemes (Perthshire Green Card and Perthshire Highlands Golf Ticket), review existing golf tourism marketing initiatives in other parts of the country and examine the scope to broaden out future project activity in the study area to include produce/business/skills/events development;
- identify all private providers and public partner agencies involved in golf tourism and potential opportunities to encourage a more industry-led approach to golf tourism in the area, in partnership;
- produce a series of actions and recommendations aimed at securing and realising the growth potential of golf tourism in the area.

Methodology

1.4 The study was carried out between January and April 2013 and involved the following research tasks:

- desk based review of background material – other research on golf tourism such as the Golf Tourism Monitor and other market reports
- interviews with key stakeholder organisations – this included VisitScotland, Scottish Golf Union and other golf development groups
- interviews with local golf tourism businesses – this was a mix of face to face and telephone interviews and included golf clubs, hotels, golf tourism operators
- presentation of draft research findings to a stakeholder workshop – this was held at Blairgowrie Golf Club in late March 2013.

1.5 A list of all study consultees is provided in Annex A.

Structure of the report

1.6 The remainder of the report is structured as follows:

- Section 2 – provides background and context
- Section 3 – summarises the golf tourism facilities in Perth and Kinross
- Section 4 – describes the economic values of golf tourism locally
- Section 5 – sets out the different factors that are likely to influence future growth
- Section 6 – provides an assessment of the growth potential
- Section 7 – includes examples of other relevant initiatives
- Section 8 – sets out our conclusions.

1.7 We also include a list of consultees as Annex A.

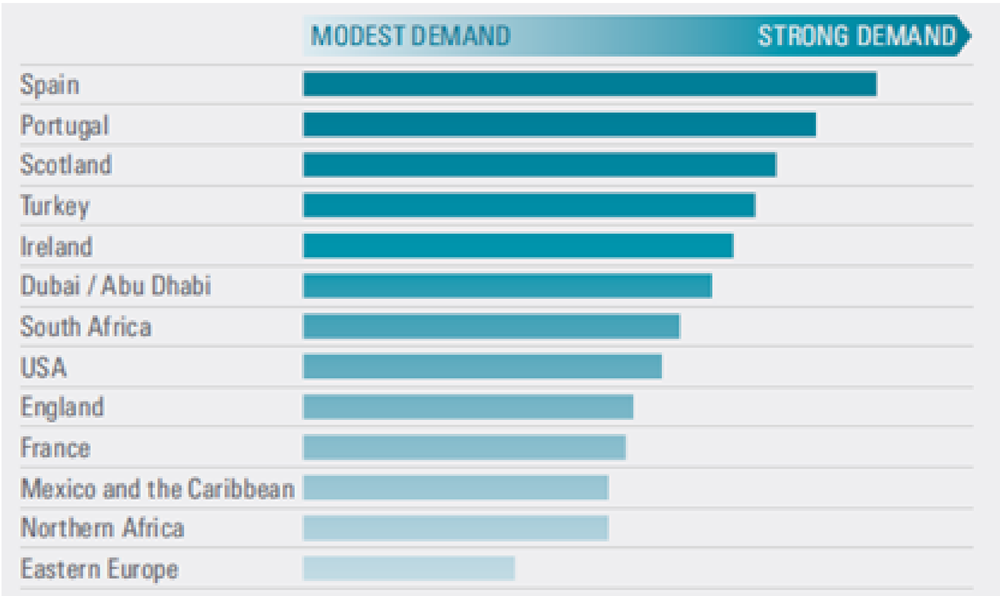
2. Background and context

2.1 In this first section we provide some background on the importance of golf tourism to the Scottish economy and also look at trends within the tourism and golf tourism sector at a national and local level. Looking back over the last few years provides important context when then projecting how the sector may grow in the future.

Importance of golf tourism to the Scottish economy

2.2 Scotland is well known world-wide as the home of golf and is consistently one of the top destinations for golf tourism. KPMG undertakes an annual survey of around 100 international golf tour operators for their view on the top destinations. The 2013 research has just been published and shows that Scotland is viewed as the third top 'hot-spot' for golf tourism in the next few years (Figure 2-1). Whilst Spain and Portugal have consistently been near the top of the rankings, Thailand has recently emerged as a popular destination.

Figure 2-1: Golf tourism destination 'hot-spots'

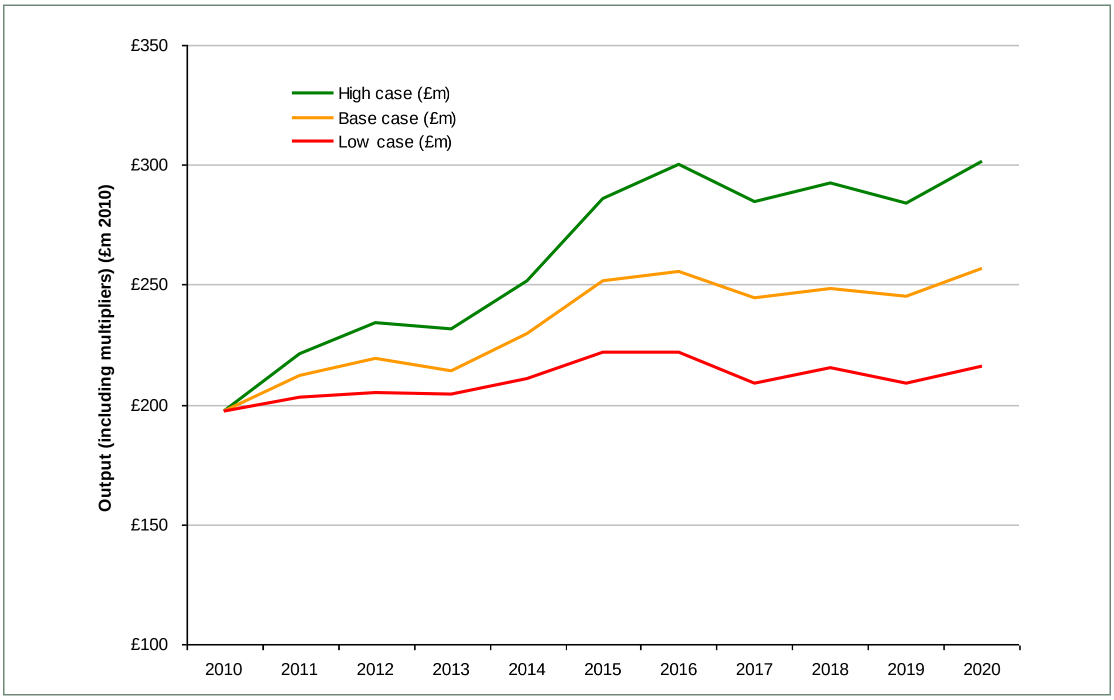


Source: KPMG Golf Travel Insights 2013

2.3 In terms of quantifying the economic value of golf tourism to Scotland, SQW produced research in 2009 for Scottish Enterprise which estimated the value to be around £220 million in business output each year, supporting over 4,400 jobs[1]. A subsequent study by SQW projected that by 2020, this figure could increase by nearly 30%, generating a potential £300m for the Scottish economy[2]. Figure 2-2 shows three scenarios of growth up to 2020 (excluding the economic impact of the events held in Scotland). Under the base case, output grows from £197 million in 2010 to £257 million after ten years (in 2010 prices). This would represent Gross Value Added (GVA) of £138 million by 2020.

[1] SQW (2009) Scottish Golf Tourism Market Analysis
[2] SQW (2011) An Assessment of Golf Tourism's Future Growth Potential to 2020

Figure 2-2: Output generated by golf tourism (excl. event impacts - £m in 2010 prices)



Source: SQW

2.4 In our assessment of the growth potential of golf tourism at the Scotland level we were asked to present some indication of growth within the golf regions of Scotland. This involved a number of assumptions using a relatively small sample of data from courses participating in the Golf Tourism Monitor and so these were intended to be indicative only. However, they do illustrate the economic value of golf tourism in different parts of the country and how growth is likely to differ across the country (through supply and demand issues). The largest change was expected in the North East of Scotland due to the opening of the Trump course.

Table 2-1: Regional distribution of forecasts (£ millions in 2010 prices)

	2010	2015	2020
Central	7.8	9.0	9.2
Historic Heartlands	43.4	51.9	51.6
Highlands & Islands	10.0	10.2	11.4
North East	7.3	23.4	23.9
South East	21.3	25.5	26.3
South West	29.5	32.6	33.3
Total	**119.3**	**152.6**	**155.6**

Source: SQW (2011)

Tourism trends

2.5 VisitScotland produces data from the UK/GB Tourism Survey on domestic visitors and from the International Passenger Survey on overseas visitors. In the table below we have set out figures for Perth and Kinross and for Scotland. The latest data (2011) shows that Perth and Kinross has over 800,000 domestic visitors (those staying overnight) spending £180m and around 120,000 overseas visitors spending £35m. These figures have changed significantly since the start of the economic downturn in 2008, as they also have at the Scotland level. However, the big difference is the extent to which Perth and Kinross has been affected by a drop-off in overseas visitor numbers and spend, from £49 million to £35 million. Some of this has been offset by domestic visitors (the 'staycation' effect) but overall numbers are lower than four years ago.

2.6 Despite the small fall in trips, tourism expenditure was slightly higher in 2011 at £215 million compared with £193 million in 2008. In comparison with Scotland as a whole Perth and Kinross has seen significant growth in domestic visitor expenditure and a large fall in overseas expenditure.

Table 2-2: Tourism in Perth and Kinross and Scotland 2008-11

	2008	2009	2010	2011	% change 08-11
Perth and Kinross					
Domestic trips (m)	0.82	0.74	0.79	0.83	1%
Domestic spend (£m)	144	141	171	180	25%
Overseas trips (m)	0.14	0.13	0.11	0.12	-12%
Overseas spend (£m)	49	45	31	35	-29%
Perth and Kinross trips (m)	0.96	0.87	0.90	0.95	-1%
Perth and Kinross spend (£m)	193	186	202	215	11%
Scotland					
Domestic trips	12.15	12.46	12.37	13.66	12%
Domestic spend	2812	2736	2628	3018	7%
Overseas trips	2.48	2.54	2.35	2.35	-5%
Overseas spend	1235	1369	1455	1494	21%
Scotland trips (m)	14.63	15	14.72	16.01	9%
Scotland spend (£m)	4047	4105	4083	4512	11%

Source: VisitScotland

Golf tourism trends

2.7 The main mechanism for monitoring trends in golf tourism in Scotland is through the Golf Tourism Monitor. The feedback covers visitor rounds and revenue. The number of courses participating varies year on year: in 2011 there were 166 courses; in 2010 the figure was 98. This variation in the number of participating courses makes it difficult to look at national trends (if different courses are providing the information). However, in the table below the main findings from each year's report are summarised providing an overview of recent trends since 2008.

2.8 Overall, the reports highlight the difficult market conditions and a reduction in visitor rounds being reported. Following the start of the financial crisis and recession in 2008, there was a notable drop in overseas visitors. Some of this will have been offset by an increase in domestic (UK) golf visitors coming to Scotland. The last three to four years have also experienced higher than normal rainfall which often results in a shift towards links courses from the inland courses that characterise Perth and Kinross. There have been falls in the number of golf visitor rounds of about 4% in 2008, 2010 and there is likely to be a further fall in 2012 according to the Golf Tourism Monitor data.

Table 2-3: Recent trends from Golf Tourism Monitor

Year	Main findings
2008	• Visitor rounds down 4% on previous year (for relevant courses) • 8% decrease in SIGTOA figures on overseas visitors • Golf pass numbers down 17% on previous year • Start of the financial and economic crisis with all Scotland's main markets moving into recession • One of the wettest golf tourism seasons on record
2009	• Visitor rounds broadly the same as the previous year (for relevant courses) • Visitor green fee income down 10% on the previous year (for relevant courses) • Golf pass numbers down 12% on previous year • 5% increase in rainfall in Scotland compared to previous year
2010	• Visitor rounds broadly the same as the previous year (for relevant courses) • Visitor green fee income up 15% on previous year (for relevant courses) • Golf pass numbers down 13% on previous year • 17% decrease in rainfall compared to previous year
2011	• Visitor rounds down 4% on previous year (for relevant courses) • Visitor green fee income up 6% on previous year (for relevant courses) • 37% increase in rainfall compared to previous year
2012	• Initial data on average number of rounds and revenue per course would suggest a significant drop in 2012 – this has been accessed from the website and data has yet to be published

Source: Golf Tourism Monitor

2.9 The data in the Golf Tourism Monitor also shows how visitor green fees have been declined more significantly for inland courses, which applies to all the courses in Perth and Kinross (Table 2-4). Within this group it is the courses that have a substantial visitor income of between £150,000 and £300,000 that appear to have suffered most over the past three years. This partly reflects the poor weather and the shift to links courses, but these are also the mid-tier courses that are competing fiercely for visitor income. Many of these courses are have been forced to reduce green fees, using promotional offers to compete and this appears to have had an impact on total green fee income.

2.10 However, very few of the Perth and Kinross courses have submitted data to the Golf Tourism Monitor and while this in indicative it is not the actual data for these courses. Our view is that, given the discussions with consultees, this is still a fair reflection of the pattern over the past few years.

Table 2-4: Change in visitor green fee revenue on inland courses, by green fee revenue

Inland courses (by visitor green fee revenue)	Overall change (%)	2012 (%)	2011 (%)	2010 (%)
Inland < £25	19.1	1.1	18	0
Inland £25 to £75K	-4.5	-18	4.1	9.4
Inland £75K to £150K	-1.4	1.3	10.5	-13.2
Inland £150K to £300K	-16.9	-15.3	7.7	-9.3
Inland over £300K	-	-	-	-

Source: Golf Tourism Monitor 2010, 2011, 2012

2.11 Another recent trend has been falling club memberships. In 2012, the total adult memberships at Scotland's golf clubs was around 210,000 compared with 230,000 in 2006[3]. This represents a decrease of 9% over the last six years. This change is likely to have varied across the country and we are aware from this study that there are a number of clubs in Perth and Kinross which are struggling financially due to falling memberships.

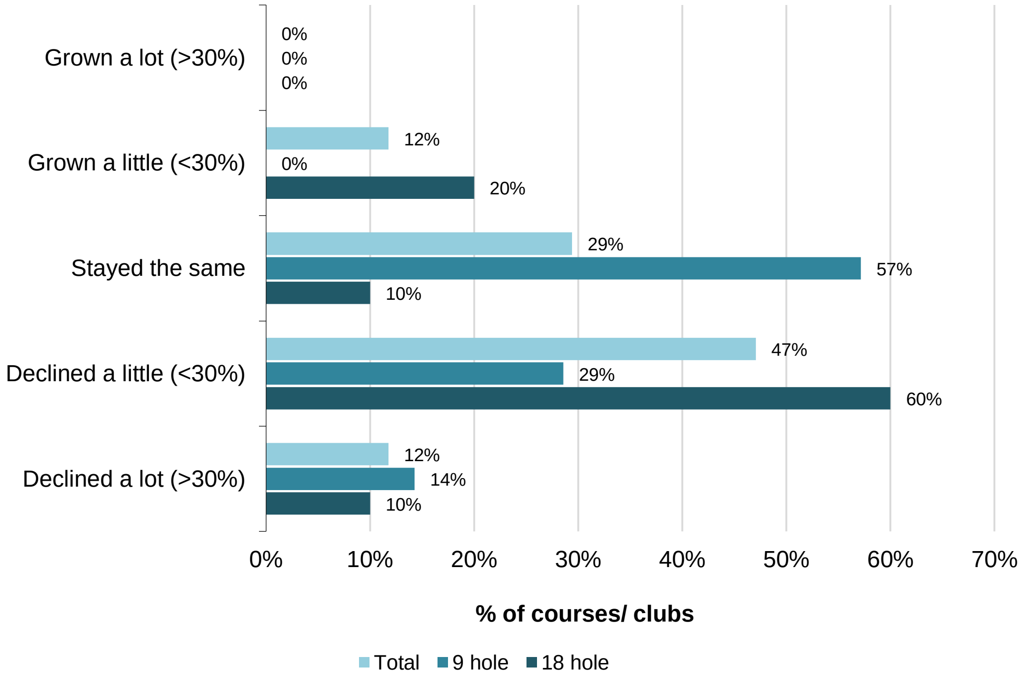
Recent trends in Perth and Kinross

2.12 The national trends for golf tourism reflected in the Golf Tourism Monitor are reflected in our discussions with the golf courses in Perth and Kinross. Nearly 60% of the courses surveyed stated that their visitor green fee income had decreased over the last five years – within this figure, 12% stated income had decreased more than 30% and just under half of all courses said the decrease was less than 30% (Figure 2-3). Focusing solely on the 18 hole courses, 70% stated that their visitor income had decreased during this period.

2.13 Taken together, the fall in visitor income and decline in membership is putting a lot of pressure on golf club finances. This has generated more interest among clubs and courses in working together to develop marketing and packages that can increase the number of visitors. With other areas developing golf groups and the profile of Perth and Kinross during the Ryder Cup, there is an opportunity to grow golf tourism.

[3] Scottish Golf Union (2012), Scottish Golf Union Limited Annual Report 2011-12

Figure 2-3: Change in visitor green fee income over the last 5 years



Source: SQW survey

3. Golf tourism facilities in Perth and Kinross

3.1 Perth and Kinross has 38 golf courses. Of these, 22 are full eighteen hole courses and 16 nine hole courses. Being inland, there are no links courses. Given the importance of links courses and particularly the Open Championship courses to golf tourism in Scotland, this puts Perth and Kinross at a disadvantage in attracting visitors that associate Scotland with links golf. However, it does include a wealth of high quality inland courses that range from the internationally recognised Gleneagles courses, including the new PGA Centenary course that will be used for the 2014 Ryder Cup, and the highly regarded Blairgowrie which is hosting the Junior Ryder Cup 2014.

3.2 It has a large number of other excellent courses throughout the area. The ones that attract most visitors are the courses at Kinross, Murrayshall, Pitlochry, Crieff and Auchterarder. There are smaller highland courses, such as Aberfeldy, Dunkeld and Birnam, Killin and Blair Atholl, offering great holiday golf, courses in and around Perth, King James VI, Craigie Hill and North Inch and a cluster of courses in north east Perthshire; Alyth, Glenisla and Strathmore. Perth and Kinross also has a strong nine hole golf product well suited to holiday golf and families, fitting well with Perthshire's reputation for scenery and outdoor activities.

3.3 The area has a strong golf heritage with James Braid designed courses at Gleneagles, Crieff, Blairgowrie, Alyth and Taymouth Castle, part of a trail of Braids courses that extends over to Edzell, Forfar and Downfield in Dundee. There are two new developments planned. The gWest course at Auchterarder plans to open in the next 12 months. This will be a private resort with a high quality 18 hole course and residential plots, eventually including a luxury hotel. The Taymouth Castle course is currently closed but there are plans to develop the course and castle as a 5 star resort. There is more uncertainty over this development, but both would bring new visitors to the area and contribute to the tourism economy.

3.4 The parkland and heathland courses that characterise Perthshire golf generally suffer more from the wet weather and particularly in the last few years. The Golf Tourism Monitor for 2012 reports that "*once again links/coastal courses did not suffer the same drop in numbers, possibly as a result of the increased rainfall pushing visitors to more free draining courses. This figure is most notable at the lower end of the green fee income scale where inland courses reduced by 34% this year whilst their links/coastal equivalents increased by 41%.*" While most courses closed for perhaps 10 days last year because of the wet weather, for others this was up to 30. Many of the Perth and Kinross courses have invested in improved drainage, but it will remain a challenge to demonstrate to potential visitors that courses will remain open and playable when there are prolonged periods of wet weather.

3.5 The 38 courses in Perth and Kinross represent around 7% of the national total of around 570 courses. However, relative to population, Perth and Kinross has one course for every 3,600 people compared with the Scottish average of one course for every 9,200 people. Given this large number of courses per head of the population, in many cases maintaining quality and financial viability will depend on generating visitor income.

Golf courses

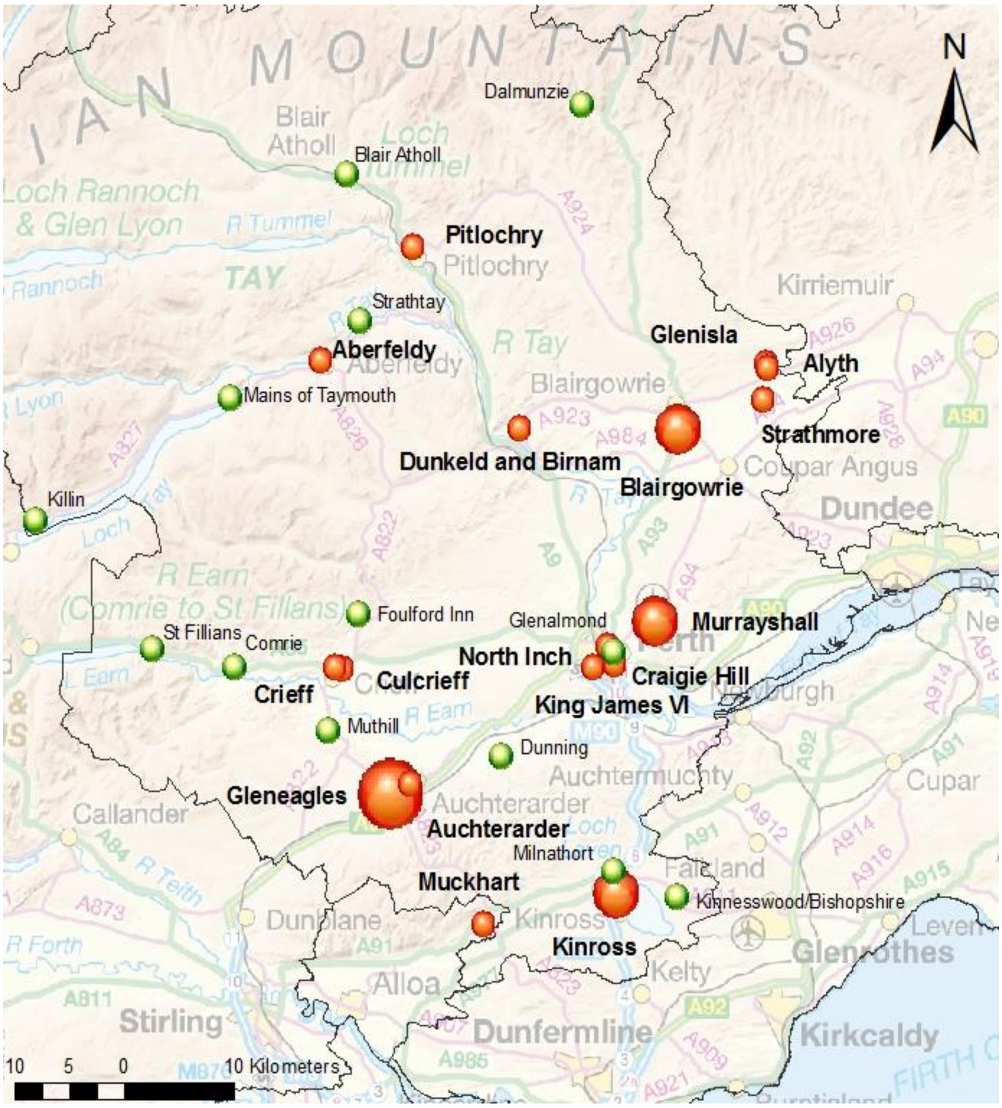
Table 3-1: List of Perth and Kinross golf courses

Name	No. of holes	Type	Name	No. of holes	Type
Aberfeldy Golf Club	18	Parkland	Blair Atholl	9	Parkland
Alyth Golf Club	18	Heathland	Blairgowrie - Wee Course	9	Heathland
Aucheterarder Golf Club	18	Parkland	Comrie Golf	9	Heathland
Blairgowrie – Landsdowne	18	Heathland	Crieff – Dornock	9	Parkland
Blairgowrie – Rosemount	18	Heathland	Dunning Golf Club	9	Parkland
Craigie Hill Golf Club	18	Parkland	Foulford Inn Golf Course	9	Parkland
Crieff – Ferntower	18	Parkland	Gleneagles – PGA National Academy	9	Heathland
Culcrieff Golf Club	18	Parkland	Killin Golf Club	9	Parkland
Dunkeld & Birnam	18	Heathland/ Parkland	Kinnesswood – Bishopshire Golf Club	9	Heathland
Gleneagles – King's Course	18	Heathland	Mains of Taymouth Golf Course	9	Parkland
Gleneagles – Queen's Course	18	Heathland	Milnathort Golf Club	9	Parkland
Gleneagles – PGA Centenary Course	18	Heathland	Muthill Golf Club	9	Parkland
Glenisla Golf Course	18	Parkland	Spital of Glenshee – Dalmunzie	9	Parkland
King James VI	18	Parkland - Island	St Fillans Golf Club	9	Parkland
Kinross – the Bruce	18	Parkland	Strathmore Leftie Links	9	Parkland
Kinross – the Montgomery	18	Parkland	Strathtay Golf Club	9	Parkland
Murrayshall Golf Course	18	Parkland			
Murrayshall – the Lynedoch Course	18	Woodland			
Muckhart Golf Club	18	Heathland			
North Inch Golf Course	18	Parkland			
Pitlochry Golf Club	18	Heathland			
Strathmore Golf Centre	18	Parkland			
Taymouth Castle – *currently closed*	18	Parkland			

Source: Perthshire Golf Guide

3.7 The locations of the golf courses are shown in Figure 3-1. Eighteen hole courses are highlighted in orange and the nine hole courses are green. The size of the marker represents the number of golf visitor rounds reported by the courses. It shows how widely spread the golf offer is spread across the area with clusters around Perth, Gleneagles, East Perthshire and up to Pitlochry.

Figure 3-1: Map of Perth and Kinross 18 and 9 hole courses by visitor rounds



Source: SQW

Online booking

3.8 Among the 18 hole courses, online booking is relatively evenly split. Although most will take bookings over email, the eight on the left of the table have online booking systems that allow visitors to look at the available tee times and prices. Online tee booking is becoming increasingly important. It need not replace the telephone or email bookings, and some visitors may prefer to discuss options, but for others it allows them to compare times and prices. Having on-line booking is increasingly expected by visitors in the same way that many other services can be booked online. The risk is that not having it could mean that potential visitors book elsewhere. It also allows more flexible pricing and the potential to combine tee time booking with other clubs.

3.9 Scottish Enterprise and the Scottish Golf Union currently offer support to clubs around the country to develop online tee-time booking system. Grants of up to £500 are available towards the development costs as well as other business development support.

Table 3-2: Availability of online booking systems amongst 18 hole courses

Name	Online booking system	Name	Online booking system
Alyth Golf Club	Yes	Aberfeldy Golf Club	No
Auchertarder Golf Club	Yes	Culcrieff Golf Club	No
Blairgowrie	Yes	Dunkeld & Birnam	No
Craigie Hill Golf Club	Yes	Gleneagles	No
Crieff	Yes	Glenisla Golf Course	No
Kinross	Yes	King James VI	No
Pitlochry Golf Club	Yes	Murrayshall	No
Strathmore Golf Centre	Yes	Muckhart Golf Club	No
		North Inch Golf Course	No

Source: SQW research online

Accommodation

3.10 The main golf visitor accommodation providers identified in the consultations include the Gleneagles Hotel, Murrayshall House Hotel, the Green Hotel in Kinross, the Atholl Palace Hotel, Crieff Hydro and Scotland's Hotel. A number of accommodation providers are now linked to www.perthshire-golf-breaks.co.uk including Ballathie House Hotel, the Red House Hotel, East Haugh House and Green Park Hotels in Pitlochry. There is also high quality self-catering throughout the area such as the Duchally Country Estate at Auchterarder. There is a good range of smaller, three and four star accommodation that caters for staying golf visitors, although Gleneagles is the only five star resort.

3.11 VisitScotland has a Golfers Welcome scheme which recognises businesses which provide information and facilities for visiting golfers. A list of the accommodation providers in Perth and Kinross which are part of this scheme is provided below (Table 3-3). To be part of this quality assurance scheme, accommodation providers need to be provide visitors with secure storage for golf clubs, laundry and drying facilities, and information on local golf clubs.

Table 3-3: Local accommodation provides registered with Golfers Welcome scheme

Property Name	Accommodation type	Town
Alexander Residence - Barossa Apartment	Self-catering	Perth
Arduthie House	Small serviced	Crieff
Atom Crow Cottage	Self-catering	Pitlochry
Barley Bree Restaurant with Rooms	Small serviced	Crieff

Property Name	Accommodation type	Town
Crieff Hydro Hotel	Hotels	Crieff
Culdees Bunkhouse	Hostel	Fearnan
Dunfallandy Guest House	Self-catering	Pitlochry
Fernbank Guest House	Small serviced	Aberfeldy
Garden Wynd and Gate Lodge	Self-catering	Aberfeldy
Hilton Dunkeld	Hotels	Dunkeld
Invermay Holiday Homes	Self-catering	Blairgowrie
Moness House Hotel & Country Club	Hotels	Aberfeldy
Munro Luxury Apartment - Vasart Court	Self-catering	Perth
Olive Grove Cottage	Self-catering	Alyth
Red House Hotel	Small serviced	Coupar Angus
Scotlands Hotel	Hotels	Pitlochry
Tayside Hotel	Hotels	Stanley

Source: VisitScotland

Characteristics of golf tourism sector

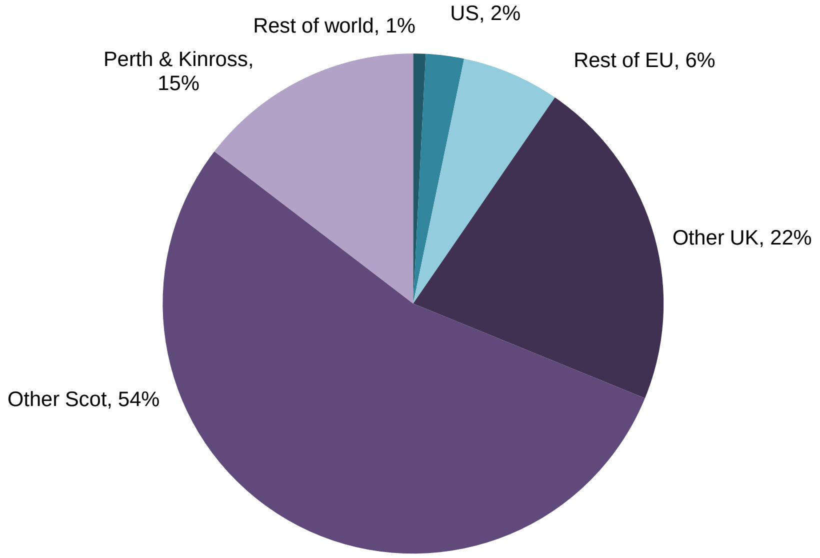
3.12 The profile of visitors estimated from the feedback from golf courses and clubs closely matches the profile reported in the Golf Tourism Monitor and in other surveys over the past few years. Table 3-4 shows the percentages estimated by the courses we interviewed and the results from the GTM 2012. The table includes the figures for the Historic Heartland, which also includes Fife, Angus and Dundee. The main differences are that Perth and Kinross attracts fewer North American visitors (who will tend to visit the Open links courses), and slightly more visitors from the rest of the UK. It supports the views of courses that were interviewed in our study that Scotland and the north of England tended to be their main geographic markets.

Table 3-4: Geographic profile of golf visitors in Perth and Kinross and Scottish average from GTM 2012

	Scotland	Rest of UK	Europe	North America	Other Overseas
GTM average 2012	70%	17%	6%	5%	2%
Perth and Kinross	69%	22%	6%	2%	1%
Historic Heartland	72%	13%	6%	7%	3%

Source: SQW and GTM data

Figure 3-2: Geographic profile of golf visitors in Perth and Kinross



Source: SQW survey

3.13 Depending on the course, the profile of golf visitors varied. Those nearer to Fife and Angus attracted day visitors who were playing in these other areas. Another course felt that visitors tended to be "passing through" on their way to other golf destinations. Golf visitors tended to be in all male groups, although some courses attracted more families and holiday golfers, particularly at nine hole courses and those with lower green fees.

3.14 Based on discussions with some of the larger courses, the number of North Americans playing golf in Perth and Kinross has fallen over the past few years, although they have always represented a small proportion of the local golf visitor market. The larger courses also reported a small number of golf visitors from Scandinavia and Northern Europe (Germany, Holland, France).

3.15 The courses and other golf tourism businesses highlighted that the number of golf visitors using the Perthshire Green card had declined in the last few years while the numbers using other discount vouchers has grown.

Strengths and weaknesses summary

3.16 There was fairly broad agreement throughout the consultations on the strengths and weaknesses of the golf offer in Perth and Kinross. These are summarised below.

Strengths/ Opportunities

- The high profile 'trophy' course at Gleneagles and other good quality 'hidden gems'
- Accessibility – central Scotland location and good transport links
- Generally good value for money and relatively easy to book tee times

- Range of courses for different abilities including good quality 9 hole product
- Quality of local scenery
- The wider offering as holiday destination – walking, cycling, outdoor activities, attractions, distilleries etc.
- Ryder Cup – potential hook for increasing local tourism more generally.

Weaknesses/ Threats

- Lack of links courses meaning low levels of overseas golf visitors
- Lack of profile as a golf 'destination' – over-shadowed by Angus and Fife
- No obvious geographic clusters – the top courses are spread across the region
- Higher risk of flooding (at some courses) compared to links courses
- Mixed quality of accommodation, especially in Perth
- Decrease in take-up of golf passes (Perthshire Green Card down from 1235 in 2009 to 753 in 2011)
- Too many courses competing for a relatively small number of visitors
- Other areas developing golf groups to promote their regions.

3.17 Underpinning the strengths and weaknesses, is the sense that the area is not perceived as a golf destination, and this is backed up by the figures. The area continues to attract day visits to the many good courses, but fewer visitors stay and play. This is partly because of geography (good access to the central belt and to Fife and Angus) and the location of courses throughout the area, but is also a result of perceptions; that there are good courses in Perth and Kinross, rather than it is a good place to play golf.

4. Economic value of golf tourism

4.1 The study prepared by SQW in 2010/11 provides the most recent estimate of the value of golf tourism in Scotland. It was based on estimates of visitor rounds and revenue provided by a sample of golf courses as part of the National Golf Tourism Monitor[4] (GTM). The GTM data does not provide any visitor profile data so this was combined with surveys carried out for VisitScotland by Sports Marketing Surveys in 2006 and 2007[5] which provided estimates of visitors by origin and the number of rounds they played *per trip.*

4.2 Since the previous study, GTM and anecdotal evidence suggests quite a significant fall in visitor rounds over the past few years, particularly in terms of visitors from the US. In 2011, the number of visitor rounds was estimated to have fallen by 4% on 2010, although green fee income was up, and the initial results for 2012 suggest that the average number of rounds and revenue per course has fallen further in 2012. The GTM says that “Scotland's golf courses have seen a further 2.5% drop in visitor numbers in 2012 compared to 2011”.

4.3 A combination of poor weather and recession will have seriously impacted on visitor golf numbers. However, the feedback from courses for 2013 was more optimistic with bookings higher than at this time last year.

4.4 The 2010 baseline estimated 137,000 staying golf visitors to Scotland. Over the past year, this figure is likely to have remained the same or even fallen slightly last year. Perhaps closer to 130,000. US visitors have fallen sharply, while the “staycation” effect may have offset some of this decline. The feedback from Perthshire courses suggests that overall there has been a decline over the past five years for most. Table 4-1 shows the baseline estimate for Scotland in 2010 based on the GTM data.

Table 4-1: Baseline economic impact of golf tourism in Scotland 2010

	2010
Visitor rounds	693,700
Total visiting golfer trips	136,800
Economic impact	
Expenditure by visiting golfers	£119 million

Source: SQW estimates 2011

4.5 Estimates for Perth and Kinross are based on discussions with all the main courses in the area. Each was asked to provide green fees and an estimate of visitor rounds. Visitor rounds include all visitors staying overnight and day visits. We have also included notional green fees for visitors that are staying in associated accommodation and corporate visitors, where golf is part of a larger package.

4.6 The survey also collected estimates of the proportion of rounds that were played by staying and day visiting golfers. Each course’s estimates was applied to the number of visitor rounds to give the total figures in Table 4-2.

[4] www.golfmonitor.co.uk
[5] VisitScotland (2007) Golf Visitor Survey 2007, VisitScotland (2006) Golf Visitor Survey 2006

4.7 The figures for Perth and Kinross are summarised in Table 4-2. In total there around 118,000 visitor rounds and total green fee revenue is £4.1 million. Of the total £2.6 million is estimated to come from day visitors and £1.5 million from staying visitors.

4.8 Compared with the national estimates that used the GTM data collected by MW Associates for the original impact work, the proportion of staying visitors is lower in Perth and Kinross, perhaps reflecting its accessibility to the central belt and proximity to Fife where a lot of golf trips are based.

Table 4-2: Estimates of number of rounds and visitor green fees for 2012

	Staying visitor	Day visitors	All visitors
No of rounds	40,000	78,000	118,000
Green fee income	£1.5 million	£2.6 million	£4.1 million

Source: based on club and course estimates

4.9 The survey of courses also gathered information on where visitors came from. Expenditure from Perth and Kinross residents is typically not considered to represent "additional" income for the local economy. The survey estimated that around 12% of the visitor rounds were played by Perth and Kinross residents, who are presumably day visitors. This gives a total of 104,000 rounds from visitors to the area.

4.10 The national estimates of golf expenditure were based on an analysis of the 2008 National Golf Tourism Monitor by MW Associates. This estimated that total visitor green fees were £54.5 million and that of this 55% was from staying visitors.

4.11 Overall Perth and Kinross green fees represent around 8% of the national total, but only 5% of staying visitors and 11% of day trips. Because staying visitors spend more, this has reduces the overall economic impact

Expenditure in Perth and Kinross

4.12 The expenditure estimate is based on the reported visitor green fee revenue in the GTM which, we know from a number of expenditure surveys, represents about 25% of total expenditure on a golf trip[6]. Where we know the costs of accommodation, the figures for specific courses have been adjusted to provide better estimates.

4.13 For day visitors we have assumed that green fee expenditure in Perth and Kinross is 60% of the total. SMS's 2007 survey for VisitScotland found that for day visitors green fees were 60% of total expenditure and the MW Associates' survey of golfpass users (2008) yielded a ratio of 64%. This is typically a further £20 per person to cover food and drink and other local purchases. In practice, many will spend less and others much more.

4.14 Using these ratios gives the expenditure figures in Table 4-3. This shows total expenditure of £9.8 million including both staying and day visitors.

[6] See, for example, KMPG (2008) Golf Travel Insight in EMEA 2008. The 2007 survey of golfing visitors carried out by Sports Marketing Surveys (SMS) for VisitScotland found a similar figure of 25% and this was further supported by MW Associates' 2008 survey of users of the First in Fife Golfpass which found that staying visitors spent, on average, £491 in total of which £113 (23%) was spent on green fees.

Table 4-3: Expenditure based on green fee estimates

Category of expenditure	£ millions (2012)
Staying visitor green fees	1.5
Staying other expenditure	4.5
Total staying expenditure	6.0
Day visit green fees	2.3
Day visit other expenditure	1.5
Total day visit expenditure	3.8
Total	**9.8**

Source: SQW estimates

4.15 One of the advantages of Perth and Kinross' accessibility is that the proportion of day visitors relative to staying visitors is likely to be higher than in other areas. Several courses reported that visitors tend to pass through rather than stay, while the proximity to the border with Fife means that other visitors may stay in Fife and travel to Perth and Kinross as a day trip. This has the effect of limiting the overall spend, because staying golfers will tend to spend more than day visitors.

Economic impact

4.16 The contribution of visiting golfers can also be measured by the number of jobs and the Gross Value Added (GVA) that the expenditure brings to the economy. This can be calculated using national ratios that relate the output of specific sectors to employment and GVA. The most recent data for Perth and Kinross is for 2010. The majority of the expenditure is made in the visitor economy (e.g. accommodation, food and drink, transport and entertainment). The Scottish Government statistics for businesses[7] gives a ratio of £32,100 of output per Full Time Equivalent (FTE) job in the tourism sector.

4.17 In addition, there will be further "multiplier" effects as the businesses that receive this new expenditure from visitors make purchases from their suppliers. Some of this will be in Perth and Kinross. There is no published multiplier figure at a local level, but the national output multiplier in the Government Input Output tables is 1.53[8]. It will be smaller for Perth and Kinross, and in the absence of other data we have assumed a value of 1.3. This is applied to the output generated by visiting golfers and adds a further £3 million of trade through the supply chain and as a result of wages and profits being recycled.

4.18 In total, the value of golf visitors to Perth and Kinross is estimated to be around £12.8 million in total, supporting just less than 400 jobs (300 direct jobs and a further 100 indirect jobs). Even though the proportion of rounds and green fee income from day visitors is much greater, the value to the economy of staying visitors is considerably higher.

4.19 It reinforces the value to the economy of generating staying trips rather than day trips and provides part of the rationale for encouraging golf clubs and other related services to work together to grow these types of trips.

[7] http://www.scotland.gov.uk/Topics/Statistics/Browse/Business/SABS/LATables/Tourism-by-LA
[8] http://www.scotland.gov.uk/Topics/Statistics/Browse/Economy/Input-Output/IOAllFiles2007

Table 4-4: Economic impact of golf tourism in Perth and Kinross

	Staying visitors	Day Visitors (excluding P&K residents)	Total (excluding P&K residents)
Green fee income (£m)	1.5	2.3	3.8
Total visitor expenditure (£m)	6.0	3.8	9.8
Direct employment	187	118	305
Total spend (£m incl. multiplier effects)	**7.8**	**4.9**	**12.8**
Total employment (incl. multiplier effects)	**243**	**153**	**397**

Source: SQW estimates

Comparisons with Scotland and other golf regions

4.20 For the 2011 report 'An Assessment of Golf Tourism's Future Growth Potential to 2020', we provided estimates of golf tourism for each of the regions used in the Golf Tourism Monitor. These were intended to be *indicative only* as they were based on a "green fee band" and used average green fee values for each band from the GTM survey. The calculations for each region also assumed that the split between day visitors and overnight visitors was the same for the same types of courses regardless of where they are.

4.21 The regions are defined using the Golf Tourism Monitor geographies are described in the Table 4-5. The data in the table is based on the 2008 GTM survey and uses the average reported by each type of course to estimate totals for each geography. The total visitor green fees figure for Scotland was estimated to be £54 million.

Table 4-5: Estimated staying visitor green fees by region (using GTM 2008 data)

	Visitor green fee estimates (£ million 2008)	% of Scottish total
Central: Glasgow, Stirling, Loch Lomond, Dunbartonshire, Renfrewshire, East Renfrewshire Clackmannanshire, Falkirk, Lanarkshire	6.1	11%
Historic Heartlands: Fife, Angus, Dundee, Perthshire	17.6	32%
Highlands & Islands: Highland, Shetland, Orkney, Western Isles	4.5	8%
North East: Aberdeen, Aberdeenshire, Moray	4.7	9%
South East: Edinburgh, Lothians, Borders	9.8	18%
South West: Argyll and Bute, Ayrshire, Dumfries and Galloway	11.9	22%
Scottish total (2008)	**54.5**	**100%**
Perth and Kinross (2012)	**4.1**	**8%**

Source: SQW

4.22 The comparable figure for Perth and Kinross is £4.1 million which represents 8% of all Scottish green fees based on the 2008 GTM figures. In practice this proportion may have risen as visitor green fees across Scotland are likely to have fallen over the past few years.

4.23 As a comparison, with the main golf areas in Scotland, Perth and Kinross has around half the number of courses in the North East (72) and the South East (88), and a third of the number in the Historic Heartlands which also includes Fife, Dundee and Angus (107). To put the Perth and Kinross visitor green fee figure in context, Perth and Kinross has around half the number of courses as the North East, but receives almost as much in green fee income (based on North East visitor green fee income prior to the Trump course opening).

Table 4-6: Number of courses (based on GTM data 2009)

Region	Number of courses (based on GTM data)
Highlands & Islands	59
North East	72
Historic Heartlands	107
Central	120
South East	88
South West	104
Total	**550**

Source: GTM 2009

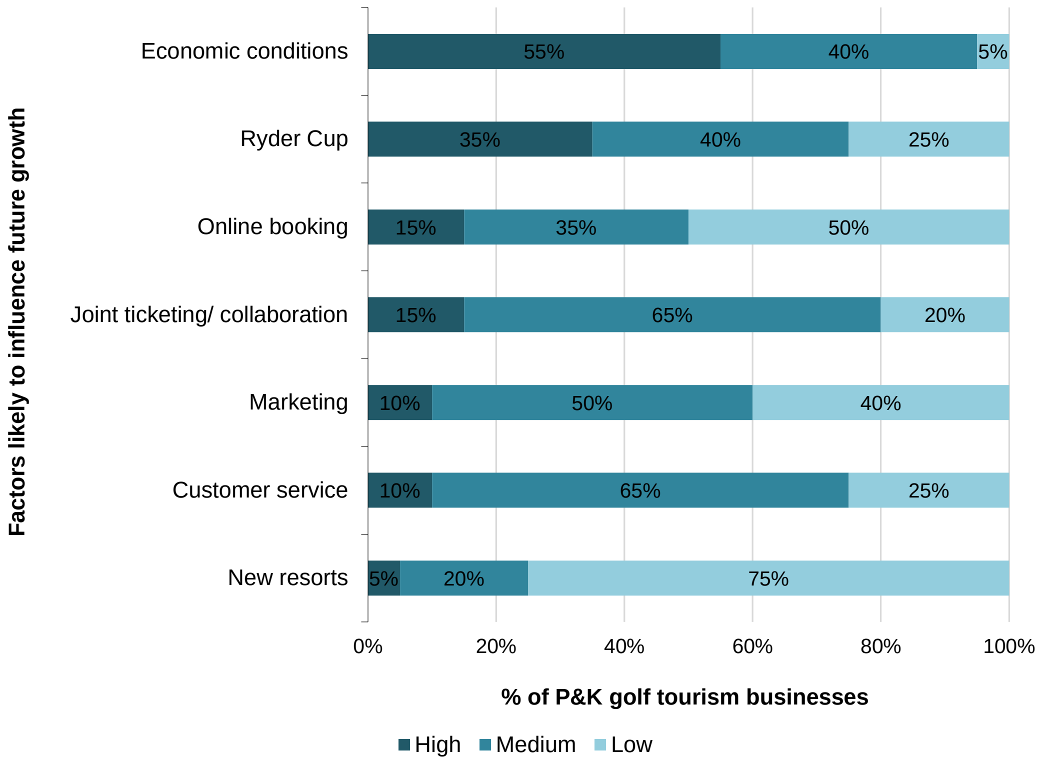
4.24 In terms of the value of visitor green fees, Perth and Kinross is broadly in line with the rest of Scotland. However it is worth noting that the green fees associated with visitors staying Perthshire and Kinross are £1.5 million which is just 5% of the Scottish total of £29 million.

4.25 Perth and Kinross has a higher proportion of day visitors and a lower proportion of staying visitors than most other areas and this has a knock-on effect to the overall economic impact that is supported. It suggests that there are more golf visitors passing through, or making day trips from elsewhere, rather than staying to play a number of rounds in the area. In part this may because Perth and Kinross is not perceived as a golf "destination" as say Fife is. This would point to strengthening messages about the range of courses and facilities that would attract more overnight visits. In other words promoting the area as a destination for golf rather than just the individual courses.

5. Factors influencing future growth

5.1 Clubs and courses were asked to identify the main drivers of golf tourism growth. The results are shown in and we then go on to summarise the feedback in relation to each driver in the rest of the section.

Figure 5-1: Views on how different drivers will affect growth in Perth and Kinross



Source: SQW survey

Economic conditions

5.2 Economic conditions continue to be the highest concern for the decline over the past couple of years and will continue to be important in the future. Over half (55%) of consultees believed this would have a high impact on growth. One consultee commented that the recession appeared to be hitting the mid-tier courses harder, while there was evidence that the championship courses were continuing to attract business. It may be the more cost conscious domestic golfers that are most likely to reduce the number of trips they make.

5.3 As important for the clubs is the impact that weaker economic conditions have had on golfers' willingness pay higher green fees. This has sparked what many courses see as courses selling tee times at very low rates ('de-valuing the product') that will reduce overall visitor income and impact on the maintenance and quality of the courses. Visiting golfers now expect to be able to negotiate better deals and few will pay full price. In Perth and Kinross, the large number of courses and declining demand have further fuelled competition and the risk is that this could lead to courses closing and/or quality falling. This competition can also make it harder for courses to co-operate with each other.

Ryder Cup

5.4 The Ryder Cup was also seen as a major driver of growth for the area. Over a third of our consultees stated that this would have a high impact on future growth of golf tourism in Perth and Kinross. Responses to the strength of the boost that it will provide local courses varied and will depend greatly on the way in which the event is marketed and presented. If it is entirely focussed on Gleneagles rather than Perthshire, other courses are less likely to benefit from being associated with it. There are essentially three phases of impact; pre, during and post event. In the pre-event there are opportunities to use the build-up to present Perthshire as the home of the Ryder Cup and generate interest in the range of local courses.

5.5 During the event, consultees highlighted opportunities to offer packages that included playing as well as attending the event. Although we understand that around 70% of the Ryder Cup Travel bookings are likely to be based in Glasgow, Edinburgh and St Andrews, there will nevertheless be some event attendees staying locally. For example, both Murrayshall and Atholl Palace hotels are registered Ryder Cup accommodation suppliers. In addition, with park and ride facilities being provided in Perth (and also Kinross), some people will want to stay overnight nearby. Within Perth especially there are opportunities to 'sell' the wider area both for playing golf (perhaps promoting country golf memberships) but also as a tourism destination more generally.

5.6 At the start of the Ryder Cup week, Blairgowrie is also hosting of Junior Ryder Cup which will bring in families to the area. Although some attendees will be day visitors, many event organisers and participants (and their families) will be staying overnight in the local area. Even if people do not manage to get tickets for the main Ryder Cup event, the Junior event provides an opportunity to be part of the whole experience and will represent another chance to promote the wider golf and tourism offering in Perth and Kinross, hopefully encouraging people to come back in following years.

5.7 The number of people coming to the area for the Ryder Cup will clearly be a welcome boost for the local economy but possibly more important is the profile of Perth and Kinross hosting what is often described as the world's third largest sporting event (measured by worldwide TV audience figures). Web traffic before and during the event is likely to increase significantly and all local golf tourism businesses' websites will need to ensure they are maximising the event's profile and offering packages and incentives that encourage people to play the other golf courses and stay locally. Hosting the Ryder Cup will generate more interest in the area and the courses should consider how this can be converted into attracting visitors.

5.8 While Gleneagles will be the main focus and will be expected to increase the number of visitors it attracts over the next couple of years, there will be some spillover to other courses. These may not be the high spending visitors that are looking to play only trophy courses , but groups that will play the Ryder Cup course as part of a trip, using other local courses as part of a an itinerary. It is very rare for an area like Perth and Kinross to host an event such as the Ryder Cup and consultees felt that all local businesses and public sector partners need to do as much as possible (and quickly) to make the most of this opportunity to put the area on the map.

Experience of Wales

5.9 The evidence of the impact from Wales is fairly positive. In terms of the economic impact of the event itself, research estimated the Ryder Cup generated around £54 million of direct impact for the Welsh economy and £82 million when including the multiplier effects (Table 5-1). On this basis, the Scottish Government and VisitScotland have stated that they anticipate the Ryder Cup in Scotland could generate around £100 million. When looking at the local economic impact in the Newport county (where Celtic Manor is located), the direct impact was estimated to be around £18 million (£28 million including multipliers). This gives an indication of the boost to the local economy that Perth and Kinross could also possibly expect.

Table 5-1: Economic impact of the Ryder Cup in Wales

	Total economic impact (incl multipliers)	Direct economic impact
Wales	£82.4m	£53.9m
South East Wales	£74.6m	£48.7m
Newport	£28.3m	£18.5m
UK	n/a	£28m

Source: Ryder Cup Europe LLP/Sports Marketing Surveys(2011)

5.10 There is also the impact in raising the profile of the area both in the lead up to and then after the event. Wales has seen huge growth in golf tourism from 2002 when there was only a reported 30,000 golf visitors. The Wales Golf Tourism Monitor calculated the sport brought in £42 million of golf visitor expenditure in 2010 an increase of 21% from 2009 (£34.7 million), and 200,000 visitors (including 76,000 from North America) an increase of 9% compared with 2009 (183,000). In 2011, these figures fell back slightly to £38.4m and 189,000 visitors. Between 2009 and 2011 the number of visitors has rose by around 3%, but expenditure by around 11% (£3.7 million).

5.11 Among tour operators, Perry Golf reported a slight bump in Wales interest since the Ryder Cup matches, particularly where these can be included tours with the Open Championship links on the Lancashire coast. Today's Golfer magazine quotes Your Golf Travel's Director, in 2012, claiming that "*business to South Wales over the last three years has grown by over 40 per cent not just to Celtic Manor. This year we are on budget for a further 25 per cent increase on last year*". The same article also quotes the more limited longer term legacy of the Ryder Cup in Ireland.

5.12 The majority of the growth in golf tourism visits happened in the years leading up to the event, before declining to the pre event level after two years. It is important to bear in mind that the levelling off after the event will also be a result of the weak economic conditions. The pattern in Scotland may be different. Wales had a much lower profile as golf destination and has been able to grow rapidly.

Online booking

5.13 Online booking was another potential driver of growth. There were generally mixed views on how much this would encourage additional visitors. A couple of the larger courses in our survey reported that although they have recently introduced online booking systems they have actually proved to be more useful for members so far and that the numbers of visitors using the website are still very low. However, others suggested that eventually all the main courses will have this facility and the visitor will become more used to booking this way. For all types of tourism, there is an increasing expectation to be able to book online and golf tourism is likely to be no different.

5.14 In terms of influencing future growth, it is more likely that not having online booking facilities will have a negative effect. In other areas, groups such as First in Fife and Carnoustie Country are investigating single booking portals which allow visitors to book across a number of courses rather than using separate web-sites. This also allows courses to offer discounts across courses, similar to an electronic Green Card (e.g. 20% off 2 tee time bookings etc.). It offers a lot more flexibility than the existing discount cards in Perthshire.

5.15 This is the next step in co-ordinating golf visitor offers and requires courses to work together. There were several consultees that felt that traditional golf visitors prefer to make bookings over the telephone (in some cases to negotiate a price), but the online offer would not prevent that and would have a lot more advantages. Our view is that in the first instance all courses that are seriously interested in attracting visitors should have online booking. As a further step courses should consider the development of a single portal that allows packages and tee-times to be sold across the main visitor courses.

Joint ticketing and collaboration

5.16 The main examples of collaboration amongst golf tourism businesses in Perth and Kinross are the golf tickets (Perthshire Green Card and Perthshire Highland golf ticket) and the Perthshire Golf Breaks initiative which was set up by Blairgowrie Golf Club and Ballathie House Hotel.

5.17 The Perthshire Green card offers discounted golf on 17 of the 18-hole courses and costs £99 for 5 rounds and £65 for 3 rounds. The Perthshire Highlands Golf Ticket can be used on 12 of the 9-hole courses with five days of golf available for £70 and 3 days available for £45. The cards can be purchased at participating courses, some accommodation providers and information centres but are not currently available online. Both golf cards also include vouchers for discounted admission to other key tourism attractions such as Perth Racecourse and various whisky distilleries (Bell's Blair Athol Distillery, Dewar's World of Whisky, the Famous Grouse Experience at Glenturret Distillery and Tullibardine Distillery). In terms of Green Card usage over recent years, the most popular courses have been Taymouth Castle (currently closed), Pitlochry, Crieff, Murrayshall, Strathmore and Glenisla. With the Perthshire Highlands ticket, the most popular courses have tended to be St Fillans, Killin, Comrie, Crieff and Muthill.

5.18 There has been a downward slide in the number of discount cards sold over the last three years: 1,235 in 2009 reducing to 1,020 in 2009, and then 753 in 2011. However, as confirmed by the Golf Tourism Monitor this is a similar picture across Scotland as the market has become more competitive with more attractive offers. Most consultees thought that improvements need to be made to the Perthshire Green Card. One would be to make it available online and therefore easier to purchase. Another suggested improvement would be to introduce different tiers of cards. At the moment, nearly all of the 18 hole courses request a supplement which ranges from £5 to £18 on top of what has already been paid for the discount card. Most consultees believed that this structure was proving to be overly complex and potentially putting people off and making it less attractive that the various two for one vouchers (e.g. Teeofftimes and Open Fairways).

5.19 The other example of collaboration is the Perthshire Golf Breaks website (www.perthshire-golf-breaks.co.uk) which brings together the Blairgowrie, Pitlochry and Crieff golf courses and various accommodation providers Ballathie House Hotel, Red House Hotel, East Haugh Guest House and Green Park Hotel. The website allows visitors to build their own golf and accommodation package and also provides links to discounted tickets for key local attractions including Scone Palace and Blair Castle. The partners involved in this initiative is gradually growing and would appear to be a good starting point for any golf development group in Perth and Kinross.

5.20 Another example of collaboration is the reciprocal links which exist between courses. Some of these are between courses in Perth and Kinross but others are with courses in other parts of Scotland. For example, Blairgowrie Golf Club has links with Crail Golf Club in Fife and Lossiemouth Golf Club in Moray. This is a good way of helping to bring in additional business to individual clubs and also the wider economy if golfers are staying overnight.

5.21 Overall, there was interest in greater collaboration between courses and with other potential partners providing accommodation, food and drink, transport as well as other tourism offers such as outdoor activities, distilleries etc. There is no obvious forum for this to be taken forward and this report and the Ryder Cup provides an opportunity for the area to improve co-ordination, referrals, packages and other offers that can bring more visitors.

Marketing

5.22 There was agreement from all consultees that Perth and Kinross has a much lower profile for golf tourism compared to other areas in Scotland (including neighbouring areas of Fife and Angus). There was recognition of the work that is done at the moment by VisitScotland on behalf of the Council in terms of managing the golf card schemes (Green Card for the 18 hole courses and Perthshire Highland golf ticket for the 9 holes courses), managing regional golf campaigns (including adverts in the Scotsman and Bunkered magazine), maintaining the golf pages on www.perthshire.co.uk and producing the Perth Golf Guide. However, as confirmed through discussions with golf tour operators there is quite limited awareness of what the area has to offer, especially amongst overseas visitors who tend to be primarily interested in playing links courses.

5.23 The current marketing activity over and above what is done by VisitScotland is quite limited. A number of the larger players have invested in their own individual marketing which has included taking out adverts in golf magazines (e.g. Bunkered, Scottish Field, Scottish Club Golfer, English Club Golfer), attending the annual Scottish Golf Show. However, many suggested that this is all very expensive and sometimes does not generate significant returns. Clearly a more joined up approach to marketing would reduce the individual costs to clubs and businesses.

5.24 There was a strong view from those involved in the study that more could be done in marketing Perth and Kinross as a golf tourism destination but making sure that is done in a way that builds on the area's strengths and the most relevant markets. For example, with the exception of Gleneagles, very few overseas golfers come to play golf in Perth and Kinross.

Geographically, the target markets should therefore focus on other parts of Scotland and the UK and possibly northern Europe and Scandinavia. Similarly, many people highlighted the accessibility and value for money strengths of the area. Again this is a message which should be made clear in marketing campaigns especially compared to neighbouring areas which have Open Championship courses, high demand and therefore higher visitor green fees.

5.25 The availability of different types of courses together with a range of other visitor attractions makes the area attractive place to combine family holidays and golf. For example, there are only a few parts of Scotland which can boast the same offering of distilleries and golf courses. One of these areas is Speyside where they have the Scotland's Golf Whisky Trail initiative bringing together local golf courses and distilleries. This is a model which could potentially be re-visited in Perth and Kinross (building on the vouchers scheme for local distilleries through the golf passes).

5.26 The final and most important aspect of marketing is the opportunity to raise the area’s profile on the back of the Ryder Cup. With so much publicity over the next 18 months, there are opportunities to strengthen golf tourism, improve the position of the golf clubs in the area and make a larger contribution to the tourism economy. Although, VisitScotland is planning national publicity campaign, time is running out to develop more local promotion which needs the active buy-in from courses and golf tourism businesses.

Customer service

5.27 Some of the larger courses and golf tourism businesses in Perth and Kinross are clearly fully aware of the importance of high quality customer service, which applies to all types of tourism and is central to the new national tourism strategy, Tourism Scotland 2020. A good customer experience increases the likelihood of repeat visits and also encourages visitors to provide recommendations (word of mouth or more increasingly through online and social media formats).

5.28 An important part of a golf visitor’s customer journey is the service and facilities provided at the accommodation provider (from hotels to B&Bs). There is also the welcome they receive at the golf course itself from when they make the initial booking to when they arrive to check in at the Professional Shop, and then go to clubhouse bar for some food and drink after finishing their round. At all stages, golf visitors need to be provided with good quality service. Although many tourism businesses are focused on good quality service and provide staff with the required training, there are challenges in golf tourism when people are playing some of the smaller courses. Many small clubs have to rely on members volunteering instead of employees and some have honesty boxes. In these types of clubs there is arguably more of a community facility mind-set rather than running it as a tourism business. However, with falling memberships at all sizes of clubs there is likely to be a more professional approach adopted and greater focus on customer service in the future.

New courses

5.29 Although gWest is planning to open fully in the next year (2013-14), there is more uncertainty around the development and timescales at Taymouth Castle. gWest is likely to be a members course with associated housing. It will attract members from the rest of Scotland and the UK and potentially from overseas. This will bring new golf visitor spending to the area. Depending on the profile of members, they may stay several days. While most of the expenditure would be at the course, they will also spend money more widely on accommodation, car hire, food and drink and possibly on other activities. There may be some opportunities to encourage members to visit some of the other local courses.

5.30 Less is known about Taymouth. The original economic impact plan does not identify the value of green fees or the number of visitor rounds that their business plan is based on. We understand that this is likely to be open to visitors and will be at the higher end of the market. Many of the visitors would stay in the redeveloped hotel, but it could also become part of a cluster of good quality courses in the area. Taymouth is less accessible than most of the other high quality courses, which may reduce the opportunities to link trips, however, it would generate more golf visits, and provide another high quality option around which Perthshire golf tourism can develop.

5.31 It is difficult to anticipate how these developments will impact on the visitor economy. The impact of gWest will be clearer when memberships are sold and the patterns and types of visitors are known. It is likely to have a significant positive effect on tourism. Depending on membership there could be some displacement from Gleneagles, but it is more likely to have positive effect overall on the area. Taymouth would also have a positive impact, particularly if it is open to visitors and could be included in a Perthshire itinerary. By increasing the offer in the area it would help make Perthshire more of a golf destination and encourage visitors to stay rather than make day trips.

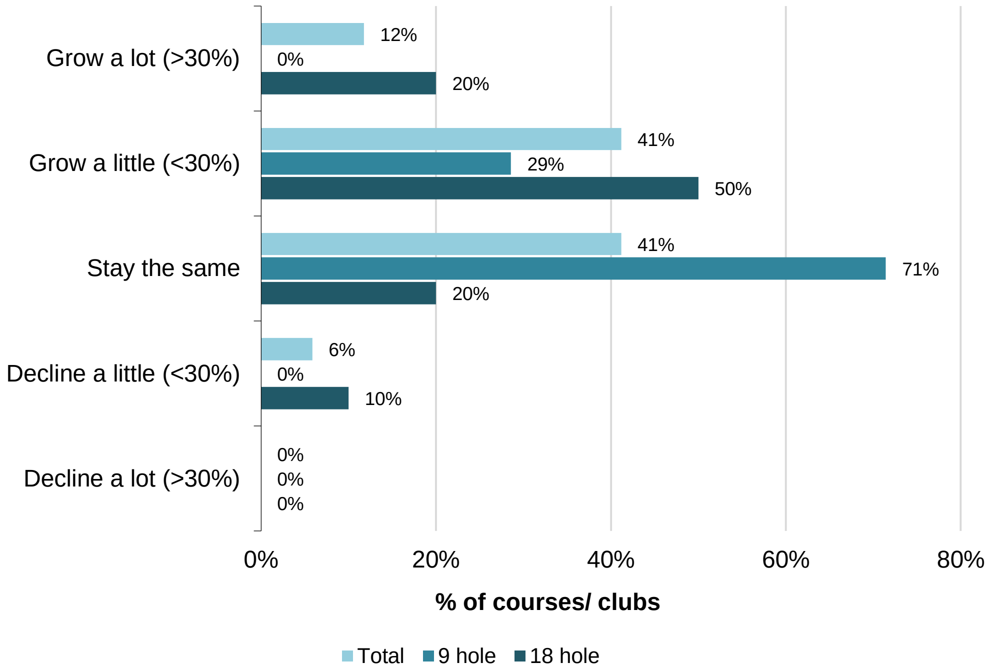
6. Growth potential

6.1 The majority of courses and clubs consulted believed that there would be growth in the value of green fees over the next seven years. Eighteen hole courses were more optimistic than nine hole ones. Among the eighteen hole courses 70% anticipated growth, including 50% that thought there would be modest growth (less than 30% over seven years) and 20% that expected much faster growth (Figure 6-1).

6.2 Certainly most felt that the next few years would not be as bad as the past. The basis for this were hopes that the economy would start to grow, increasing disposable income, that the Ryder Cup would raise the profile of the area and that better marketing, online tee booking and other initiatives would lead to increasing numbers of visitors.

6.3 While the Ryder Cup presents a great opportunity, and improvements in the economy would increase visitor numbers, competitors will also be developing their offers. In some ways marketing, online booking, passes and packages are needed simply to retain a place in the market rather than to grow it. One of the reasons for encouraging a golf development partnership is in order to compete with other destinations, in and outside Scotland that are already doing this, or are planning to do so. Without this, not only could the opportunities of the Ryder Cup be more limited, there is a longer term risk of missing out on other forms of support to promote what is a priority theme for tourism.

Figure 6-1: Anticipated change in visitor green fee income up to 2020



Source: SQW survey

6.4 The projections are based on feedback from businesses on general market conditions. Generally the main drivers are consumer spending/economy, the Ryder Cup and marketing. Although the new courses at gWest and Taymouth were not mentioned often in relation to future prospects (consultees tended to regard them as quite exclusive developments), they do have the potential to generate significant additional expenditure for Perth and Kinross. Given the models that these new courses are using, it does not seem likely that these resorts will lead to significant displacement of existing visiting golfers and there may be opportunities for other courses and golf businesses to 'piggy-back' on these new developments either through direct collaboration or using the profile of the developments to promote the wider area as a golf destination. This is happening to some extent in the North East following the opening of the Trump course. Any future golf group in Perth and Kinross would benefit from the involvement of any new resorts.

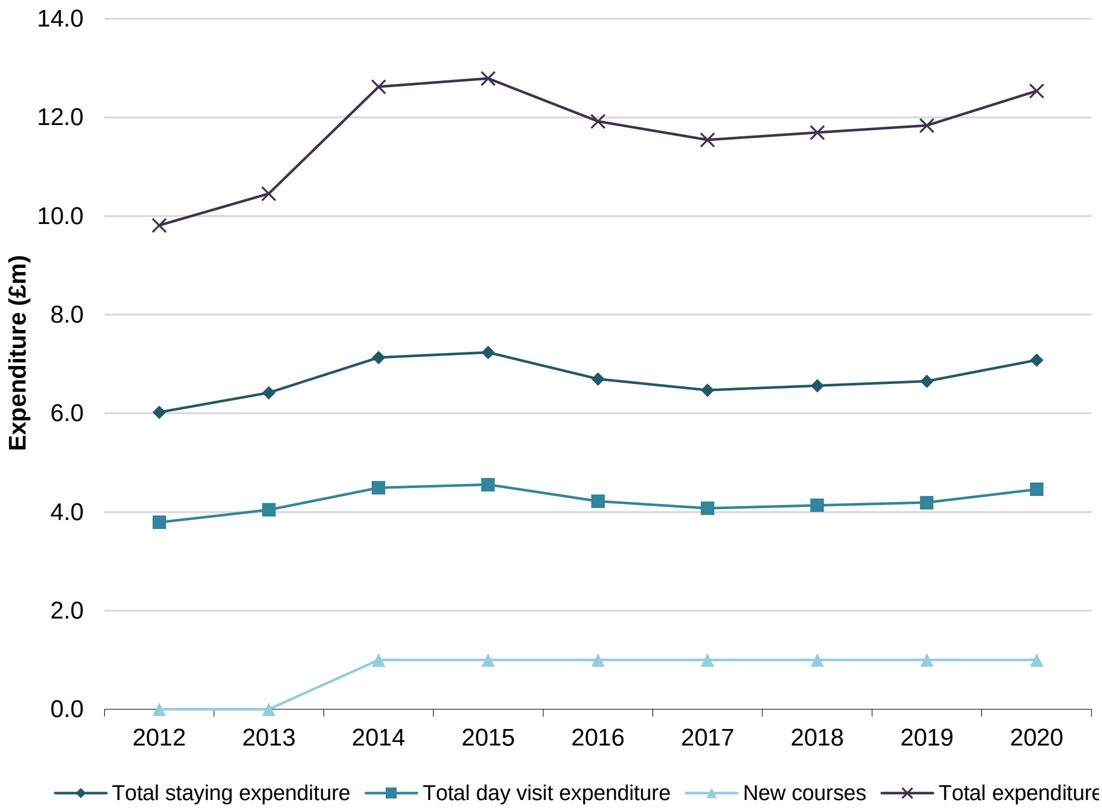
Table 6-1: Drivers and summary

Driver/factor	Summary
Consumer spending/economy	Economic conditions and consumer disposable income are a factor in tourism expenditure and golf tourism, particularly for mid-tier courses. An improvement in economic conditions would lead to more golf trips, although it also increases the opportunities to go overseas. A deterioration leads to fewer trips. **We have assumed modest growth of 1.5% a year as a result of improving economic conditions**
Exchange rates	A stronger exchange rate makes visits to the UK more expensive while depreciation would be more beneficial, making visiting better value and discourage UK residents from travelling abroad. However, for the majority of courses in Perth and Kinross, the main markets are domestic and exchange rates are not likely to have a major impact
Events	Increases tend to impact in the following year of an event – the Ryder Cup will have an impact in the year prior to the event and in the following years. **We have estimated up to a 15% increase across the area 2014 and 2015 with the impact falling back in 2016 when the next Ryder Cup takes place.** This impact is likely to be much stronger for some courses than others
New courses	gWest and Taymouth Castle courses have the potential to increase the number of visitors. gWest is likely to be solely for members, but with international membership it will bring new expenditure to the area. Taymouth Castle is more likely to be open to visitors and with associated accommodation would attract golfers to stay. **We have included some broad estimates of the expenditure that these courses could attract**. Both add to the overall golf offer.
Online booking	This is almost a "hygiene" factor – it will increasingly be expected to be there. Not developing this within a reasonable time frame could act to deter trips.

Source: SQW

6.5 Applying these assumptions to the current estimates gives growth by 2020 of around 38% in real terms. However, a large part of this is a result of the new courses. Without these growth is 18% by 2020, although growth is rapid over the next couple years as the Ryder Cup and new courses come on line (Figure 6-1), with real green fee revenue then falling back a little and continuing at the same level until 2020 with the likelihood of a further St Andrews Open. Growth of around 18% is consistent with the feedback from the consultations, where there was guarded optimism about the next five years.

Figure 6-2: Growth potential of golf tourism in Perth and Kinross



Source: SQW

Sensitivity

6.6 Although this is our core estimate of growth, there are considerable uncertainties around the economy, participation, the impact of the events, the weather and the way in which businesses respond to the opportunities. Consequently we have also developed 'high' and 'low' scenarios around the 'central' estimate. The total expenditure by golf visitors is shown in Figure 6-3 under each of the three scenarios. The lower shaded area shows the potential outcomes ranging from the low to the central scenarios. The darker area shows the more optimistic range from the central up to the high estimates.

6.7 Under the low scenario growth to 2020 is only 2%. The central estimate which includes one of the new courses has growth of 28% and the high scenario with both new courses has growth of 42% from the 2012 figure.

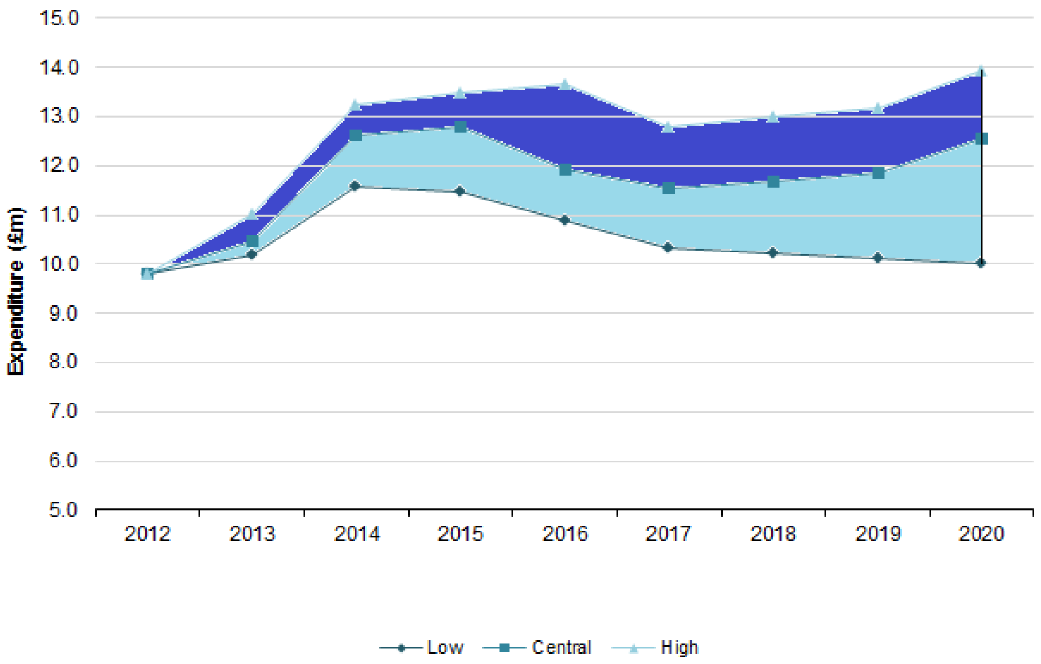
6.8 The main differences are:

- **High scenario** – underlying growth of 2% a year as tourism and golf tourism grows and the economy recovers. Both new courses open; gWest in 2014 and Taymouth in 2016, the Ryder Cup impact also increases visitor green fees by 20% in 2014 and 2015 and a small further boost in 2020 from the Open at St Andrews
- **Central scenario** – underlying growth of 1% a year reflecting a modest recovery, below the Deloittes' overall tourism estimates for Scotland. gWest opens in 2013 but

not Taymouth Castle. The Ryder Cup generates a further15% increase in visitor green fees in 2014 and 2015 and there is also a small further boost in 2020 from the Open at St Andrews

- **Low Scenario** – an underlying decline of 1% a year as golf tourism gradually falls. gWest opens in 2013 but not Taymouth Castle and the Ryder Cup generates just a 10% increase in visitor green fees in 2014 and 2015.

Figure 6-3: Growth potential of golf tourism in Perth and Kinross



Source: SQW forecasts

Aggregate differences between scenarios

6.9 The percentage change between 2012 and 2020 is one way to present the change. Another is to aggregate the report the difference in total expenditure over that period. Under the Central scenario, total expenditure would be £16.9 million higher compared with a situation in which expenditure remained at the 2012 level. Under the High scenario this figure is £25.8 million and under the low scenario it is still £6.3 million higher. This gives a better indication of the scale of the opportunity.

Table 6-2: Aggregate expenditure impact of scenarios between 2012 and 2020

	Total value 2012 – 2020
Low	£6.3 million
Central	£16.9 million
High	£25.8 million

Source: SQW

Economic impact from events

6.10 The focus of section four and this section has been to value golf tourism based on those visitors that come to the area to play golf, and how this may change over the coming years. Another aspect of economic impact is the golf events that take place in Perth and Kinross which bring visitors and their expenditure to the local area.

6.11 Our assessment of growth in golf tourism has taken into account the likely effects of hosting the Ryder Cup before and after the event. The event itself in 2014 will also generate additional expenditure in the local economy, and across Scotland. As highlighted earlier, an impact assessment of the Ryder Cup in Wales estimated that total direct impact was around £54m, and in the Newport county (where Celtic Manor is located) the direct impact was estimated to be around £18 million. This highlights the scale of potential one-off impact in the local economy.

6.12 There is one other event which takes place at Gleneagles every year, the Johnnie Walker Championships. In our previous report from 2009, it was highlighted that this event attracts around 30,000 spectators, equating to around 20,000 visitors[9]. Although most of these visitors will be day-visitors there will be some impact in Perth and Kinross. If we are to assume that 80% of the visitors are from outside the area, 5% stay overnight and an average spend of £50 for day visitors and £100 for staying visitors, then the local economic impact would be around £850,000.

Summary

6.13 Informed by the consultations and the model we conclude that:

- The next three years are important for golf tourism in Perth and Kinross. Not just because of the opportunities associated with the Ryder Cup but also the impact of changing membership patterns, a greater reliance on visitors, new ways of offering golf and the growing threat that of competitors.
  - Under the central scenario, golf visitor expenditure in Perth and Kinross grows by 28%, rising sharply to 2015, with increases reflecting the Ryder Cup and the new gWest course.
  - The High scenario has growth of 42% to 2020, based on stronger underlying tourism growth and the addition of the Taymouth castle course.
  - The Low scenario has weakening tourism and weaker impacts from the events giving growth of just 2% by 2020.
- Whether Perth and Kinross is able to achieve the central or higher levels of growth depends on both external and internal factors. The economy and weather are important external factors, but the way in which clubs, courses and partners respond can be influenced.

[9] SQW (2009) Scottish Golf Tourism Market Analysis

- In aggregate, under the central scenario, the projected increase in total expenditure to 2020 is just under £17 million compared with the current level. Under the Low and High scenarios it is £6.3 million and £25.8 million respectively.

7. Other initiatives

7.1 We now summarise examples of other golf development groups in Angus, East Lothian and Fife. All of these groups are part of the East of Scotland Golf Alliance which is funded by the local authorities and VisitScotland. Although this is now a fairly ad-hoc partnership, it is still used for some marketing where partners feel it is appropriate (for example, attending the Amsterdam Golf Show as the East of Scotland).

Carnoustie Country

7.2 Carnoustie Country started in 1999 to build on the Open at Carnoustie. It was set up by VisitScotland and Angus and Dundee Councils. Originally it was set up as a Destination Marketing Organisation (DMO) covering an a radius of around 40 minutes, down to St Andrews, but including courses in Angus, Dundee, the top of Fife and East Perthshire. The initiative actually includes a number of Perth and Kinross courses including Alyth, Blairgowrie, Glenisla, Murrayshall and Strathmore.

7.3 It has been criticised for focussing too much on Carnoustie itself and has worked to do more with the other members. It has now developed with a stronger industry-led and business development focus. It has also benefited from ERDF tourism funding, although this will end soon and it will require further private funding. The ERDF funding has allowed them to do one to one visits to courses/clubs and gather information on visitors and income, including benchmarking across 22 businesses covering 30 courses. The main issues the clubs face are in developing membership, too few ladies, developing juniors and declining income.

7.4 The group is also a good forum to bring in support from others, for example brining in industry speakers or having SGU provide a session on governance issues. A business advisor has worked with 10-12 clubs looking at buying groups, customer service, online booking and golf passes. They also provided support to get the remaining clubs online. They now have 16 or 17 with online tee booking, which will allow them to look at a central booking system through Carnoustie Country. Carnoustie Country is also a member of IAGTO (International Association of Golf Tour Operators) which means that they can provide marketing opportunities for their members. There are four levels of membership and have a couple of sub groups set up to put together products. As well as the Ryder Cup, Carnoustie Country are also looking at opportunities from the planned Darren Clarke course, The Angus, and with the potential tourism boost of the V&A in Dundee.

East Lothian Golf Tourism Alliance

7.5 The East Lothian Golf Tourism Alliance is seen by many in the sector as an exemplar golf development group genuinely being led by the private sector and helping to bring golf tourism businesses together to drive more business to the area as a whole. The Alliance was originally set up in 2005 with 16 golf tourism businesses and East Lothian Council. Over the past eight years, the membership has grown to 53 members including golf clubs, accommodation providers and the two local golf schools. The work of the Alliance has been supported by a golf development officer employed by the Council. There are four tiers of membership ranging from £100 to £1000 which determines the level of profile in the marketing material and on the website.

7.6 The main activities of the Alliance has been around marketing, both in terms of developing promotional material for print and online but also attending golf shows such as the Rhein Golf Show in Cologne, Amsterdam Golf Show and PGA Show in Orlando. The group has also recently been working with Golf Breaks to feature a special East Lothian page.

7.7 In 2013, Muirfield is once again hosting the Open Championships and this is seen as a real opportunity to raise East Lothian's profile as a golf tourism destination. In preparation for the Open, the Council made its golf development officer full time (from part time) to be able to provide more support to the Alliance members. New signage has also been put up to promote East Lothian as 'Scotland's Golf Coast' which was funded by the VisitScotland Growth Fund.. The coordination support is regarded as being vital to the success of the group and it was stated that although there needs to be buy-in and enthusiasm from the members, in order to actually coordinate activity and push things along there is an important role for a golf development officer.

7.8 The key to the success of the East Lothian Golf Alliance is the level of buy-in from the private sector and the relationships that exist between different businesses. Golf clubs and accommodation providers are no longer seeing each other as direct competitors are now willing to share contacts, attending events together and passing on visitor enquiries.

Fife golf groups

7.9 There are a range of groups in Fife which support golf tourism. These include the St Andrews Links Trust, St Andrews Golf Development Group, First in Fife Golfpass (covering the southern part of Fife), and Links with History (East Fife).

7.10 The First in Fife Golfpass initiative was set up around 10 years ago and is the only golf pass in Scotland which has its own online booking system. That is the first obvious difference fork the Perthshire Green Card. The other difference is the participation of accommodation providers in the pass. As well as having 12 courses as members, there are 15 hotels many of which offer special rates for inclusive golf breaks which include the cost of the Golfpass. Interestingly, First in Fife has also found the market very competitive with a 50% decrease in income over the last three years. Although based in Perth and Kinross, the two Kinross courses are part of the First in Fife Golfpass.

7.11 A new Fife Golf Development Group was set up by Fife Council, St Andrews Links Trust, St Andrews Golf Development Group, First in Fife Golf pass, Links with History and Elmwood College. This aims to act as a more strategic group pulling together existing initiatives was set up as limited company in November 2011. The group has a part-time project manager and the main activities of the new group are supporting member businesses, pulling together golf trails, attending events (VS Expo, Amsterdam golf show, BMW International Open in Munich, Nordea Scandinavia Masters). Funding for the group has so far come from Fife Council, Scottish Enterprise and a VisitScotland Growth Fund bid is currently being submitted.

7.12 Originally there were around 50 hotels, golf courses and resorts, the Scottish Incoming Golf Tour Operators Association (SIGTOA) and Golf Tourism Scotland members supporting the initiative. There are now over 100 members signed but because of some delays in setting up a business bank account members have still to provide their subscriptions which range from £100 to £300. In pulling together such a wide range of partners and existing initiatives the real challenge for the group has been in pitching the approach to different audiences (for example the needs of golf businesses in St Andrews will be quite different to those of businesses in Aberdour or Burntisland).

Implications for Perth and Kinross

7.13 These are just some of the groups that have been set up in different parts of Scotland to support golf tourism. There are also groups in Aberdeen City and Shire and Ayrshire. Golf tourism is an extremely part of Scotland's tourism industry and different parts of the country have recognised the value of setting up groups that encourage a more strategic approach to supporting the growth of golf tourism.

7.14 Although Perth and Kinross perhaps does not have the same assets as these other areas (in term of links and Open Championship courses), as we have already discussed it does have some genuine strengths and without a similar type of group there is the danger that the area falls behind other parts of the country.

7.15 The recent experience of setting up these groups means that Perth and Kinross can also learn the lessons of how to ensure buy-in and leadership from the private sector and how to set up structures that are appropriate to the area.

8. Conclusions

8.1 This report provides an overview of golf tourism in Perth and Kinross. Total golf visitor expenditure in Perth and Kinross is around £10 million a year and with the multiplier effects is likely to be around £13 million. This figure is relatively low compared with other areas because there are proportionately more day trip visitors and a smaller proportion stay overnight.

8.2 Based on the feedback from our consultations, golf organisations and businesses anticipate that this figure should grow over the next seven years to 2020. Our forecasts that include the effects of the Ryder Cup, the new courses and the wider targets for tourism growth suggest that this value could grow by 28%. Over the period 2013 to 2020, this would mean an additional expenditure of £17 million (around £2.4 million a year).

8.3 Perth and Kinross receives around 8% of Scottish visitor green fees, but has a higher proportion of day visitors and a lower proportion of staying visitors than most other areas and this limits the overall economic impact. It suggests that there are more golf visitors passing through, or making day trips from elsewhere, rather than staying to play a number of rounds in the area. In part this may because Perth and Kinross is not perceived as a golf "destination" as say Fife is. This would point to strengthening messages about the range of courses and accommodation. In other words promoting the area as a destination for golf rather than just the individual courses.

Findings

8.4 Over the past few years membership has declined, leading golf clubs to become more interested in ways of attracting more income from golf tourism. In Perth and Kinross the Ryder Cup is providing a catalyst for golf businesses to consider how to take advantage of the opportunities and, in the longer term, develop the area as a more attractive destination for visiting golfers. Consultations suggest that golf businesses were fairly optimistic that this could be achieved, but that this would require greater co-operation and support.

8.5 There are also opportunities through the new gWest course at Auchterarder and the possibility of the redevelopment of Taymouth Castle. With the exception of Gleneagles, Perth and Kinross golf is a less obvious golfing destination than neighbouring Fife and Angus and East Lothian and Ayrshire with their world famous links courses, but it does offer good quality, good value inland golf in beautiful settings and is particularly accessible for the central belt. Consultees recognised that international golf visitors are more likely to visit the Open Championship courses, and therefore the domestic market (Scotland and the north of England) should be the focus for Perth and Kinross.

8.6 Perth and Kinross's strengths are also in its wider tourist appeal, rather than just its golf. It embodies much of what tourists like about Scotland, particularly the natural environment. It has strong reputation for outdoor activities such as walking, climbing and fishing and is home to some of the best known distilleries. Its attraction is much broader than golf and the feedback from the consultations suggested that presenting golf as part of this much wider tourism offer was likely to be more effective than promoting golf separately.

8.7 The types of courses, including the strong nine hole facilities are more attractive to the holiday golfer or to families that will play golf as part of a holiday, rather than as the sole reason for a trip. Other potential groups would be older golfers, less serious and more about relaxing and having fun. This group will have money and time, and are increasingly happy to travel.

8.8 For the Ryder Cup the key is marketing and how Perth and Kinross presents itself. It is important that golf organisations and businesses take the opportunity to shape this and this must be a priority. For example, is there perhaps an opportunity to brand Perth and Kinross as 'home of the Ryder Cup' in the same way that Scotland is known as the 'home of golf'? The experience of Wales was that the main growth in visitors occurred between the announcement of the venue and the event itself. Growth in tourism golf revenue grew was 11% between 2009 and 2011, the years around the event.

8.9 In addition to marketing around the Ryder Cup, there are wider opportunities to raise the profile of Perth and Kinross. Consultees generally believed that more could be done to raise awareness of the area as a golf 'destination' rather than people knowing that there are some good courses in the area. Marketing efforts should focus on other parts of Scotland and the UK and possibly northern Europe and Scandinavia. Accessibility and value for money were seen as differentiators from other parts of Scotland. The availability of different types of courses together with a range of other visitor attractions makes the area attractive place to combine family holidays and golf. For example, there are few other parts of Scotland which can boast the same number of distilleries and golf courses.

8.10 Although some collaboration is already taking place in Perth and Kinross primarily through the Perthshire Green Card, Perthshire Highland golf ticket and the newly created Perthshire Golf Breaks initiative, there is certainly scope to do more. With golf tourism businesses working more closely together packages could be developed in time for the Ryder Cup tickets going on sale in October 2013. Closer collaboration would also deliver a more strategic approach to marketing campaigns, attending golf shows, learning from each other and implementing improvements to individual golf tourism businesses. Some courses are already involved in golf groups (Alyth, Blairgowrie, Glenisla, Murrayshall and Strathmore in Carnoustie Country; and the Kinross courses in First in Fife) but we understand from some of these courses there is still demand for a Perth and Kinross group.

8.11 With a number of other areas developing golf groups there is a risk that Perth and Kinross misses out. For example, missing out on marketing funding and other support that public agencies find easier to co-ordinate through an industry group. Similarly, other groups are able to co-ordinate business development support, grants for on-line booking, club and course management etc. which would be more difficult without a Partnership. Clearly there is competition between courses, for visitors, but the partnership should focus on actions that members agree would make the cake bigger, rather than on the differences between them.

Recommendations and next steps

8.12 Our main recommendation is for Perth and Kinross Council and Scottish Enterprise to provide support for a Perth and Kinross Golf Development Partnership. This should be a group that brings together clubs and courses, accommodation providers and other businesses that are interested in growing golf tourism.

8.13 The Partnership should develop an action plan detailing what they aim to do, how they will do and who will lead it. This action plan will need to align with the objectives of the National Golf Strategy in terms of attracting additional visitors, deliver a consistent "Home of Golf" brand message, developing industry leadership and encouraging better use of market information. The Council should then provide facilitation support, co-ordinating activity and help identify further sources of funding.

8.14 There is now a considerable experience of setting up and supporting golf groups although their objectives can be different. Our view is that initially at least the focus should be on developing an action and marketing plan from now until the after the Ryder Cup.

8.15 The Partnership would provide the forum for developing and overseeing these plans, with the support of Perth and Kinross Council and partners. There would also be support from SGU, GTS, VisitScotland and Scottish Enterprise.

8.16 The following provides some ideas for the scope of the Partnership

Co-ordination and leadership

- The Partnership would develop an action plan and marketing plan which would form the basis for activity over the next 18 months up to and during the Ryder Cup
- It would provide a basis enable businesses to work together to develop marketing and packages to be ready for when tickets become available.
- It would use these plans to apply for funding from a number of sources

Ryder Cup

- For the Ryder Cup, the Partnership should consider:
  - how to manage familiarisation trips
  - promoting the area with the media and marketing campaigns
  - developing and promoting the Perthshire-golf-breaks.co.uk website
  - contributing and developing marketing materials for their own and other sites
  - developing packages and engaging with other tourism businesses.

Online

- Another priority is support for online tee booking. This will become essential and all clubs with an interest in attracting visitors should be encouraged to develop this.
- The Partnership should move towards implementing a collective Perth and Kinross booking system that would enable visitors to book an entire itinerary online, with associated discounts. The online system would provide the basis for courses to offer different rates at different times.

Marketing

- The Partnership would strengthen the golfing identify of Perth and Kinross
- The Partnership should build on the perthshire-golf-breaks.co.uk website that is now running and includes, Blairgowrie, Pitlochry and Crieff. This can be extended to other courses and potentially could become a hub site for booking

Link to partners

- It would provide a forum for other groups to work with. VisitScotland, SGU, GTS and VisitScotland will be able to offer support more effectively through the group. This might cover customer service and business development
- The Partnership would also provide a link for other businesses to engage with golf and investigate opportunities. For example working with outdoor activity operators, distilleries, transport providers etc, without having to deal with individual clubs.

8.17 The immediate priority is to bring together an initial group of golf businesses with public sector partners to agree an action plan. This should set out the main areas of activity and agree sub-groups to take these forward. A priority action should be to agree a marketing plan which identifies the types of visitor that the members of the Partnership consider will be the most likely to visit Perth and Kinross. Based on the consultations, this is likely to be golfers from the central belt, the north and south east of England and possible northern Europe. However, it might be appropriate to work with a marketing specialist. The Table below sets out some of the actions that the partnership could consider, although this would be industry led, it would be supported by the Council and the other partners including Scottish Enterprise, VisitScotland, Scottish Golf Union and Golf Tourism Scotland.

Table 8-1: Indicative action plan

Action	Comment	Date
Initiate Perth and Kinross golf development partnership	Announce setting up of partnership, partner agency support and promote membership/participation	May 2013
Action plan	Agree broad remit and actions that the group want to take forward and prioritise these	End June 2013
Marketing plan	This should be a major part of action plan – identify what this will cover and how it will be taken forward.	End July 2013
Sub groups	Set up subgroups with nominated leads to cover	Set up July 20113
Web-site and online	Should be a priority to be in place before ticket sales for Ryder Cup	Complete by October 2013
Media relations/fam trips	Lead person nominated and work with Council to represent golf businesses	Agreed by October 2013
Marketing materials	Lead to work with Council/VisitScotland to bring together content and contribution for marketing	Agreed by October 2013
Joint products/packages and links with other businesses/sectors	Lead to promote development of packages and cross-business links	Agreed by October 2013

Action	Comment	Date
Funding applications	With public agencies look at opportunities for funding for marketing (e.g. VS Growth Fund)	On going

Source: SQW

Annex A: Consultee list

A.1 We are grateful to the following consultees who participated in the study.

Table A-1: Project consultees

Organisation	Name
Adventures in Golf	Jamie Gardner
Alyth Golf Club	Jim Docherty
Atholl Palace Hotel	Dougal Spaven
Aucheterarder Golf Club	David Smith
Bishopshire Golf Club	Iain Davidson
Blairgowrie Golf Club	Douglas Cleeton
Carnoustie Country/ Angus Council	Jane Taylor
Crieff Golf Club	David Murchie
Dalmunzie Golf Course	Simon Winton
Dunkeld & Birnam Golf Club	Jane Burnett
Dunning Golf Club	Trevor Abell
Fife Golf Partnership	Liam Barn
First in Fife Golf Pass	Alan Sturgeon
Foulford Inn	Maureen Beaumont
Glenalmond Golf Club	Peter Golden
Gleneagles Hotel	Billy Murray
Golf East Lothian/ East Lothian Council	Allan Minto
Golfaroundscotland	Donald Morton
Hilton Dunkeld House Hotel	Mike Metcalfe
Links Golf St Andrews	Mark Rigg
Morton Golf Holidays	Peter Craigon
Murrayshall Golf Club	Alan Reid
Muthill Golf Club	Nan Shaw
North Inch Golf Course	Alison White
Pitlochry Golf Club	Mark Pirie
Red House Hotel	Alan Bannerman
Scottish Development International	Kenneth Clark
Scottish Golf Union	John Kemp
SIGTOA (Scottish Incoming Golf Tour Operators' Association)/ Scotland Tours	Ronnie Pook
Strathmore Golf Centre	David Norman

Organisation	Name
Strathtay Golf Club	Jim Wilson
The Green Hotel Golf & Leisure Resort	Jamie Montgomery
VisitScotland	Mark Murray
VisitScotland/ Event Scotland	Alan Grant