



Scottish Enterprise
Women and Golf Tourism
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1. SUMMARY:

1.1. Key Findings:

- Growing participation rates and absolute numbers for women golfers suggest that women golf tourists represent a large potential market for Scotland, one which is currently largely untapped. The fact that over 1m of these are within 1-2 hours travel time and have a demographic profile closely aligned to Scotland's overall tourism markets is a reason for optimism, further increased by the potential of the US market.
- Overall Scotland appears to be well-equipped in principle to offer visiting women golfers what they seek, apart from guaranteed sunshine, but this may not always be clearly presented. Actions to improve the golfing culture to attract more women into the sport will also benefit female visitors.
- Women are more likely to play golf as couples or mixed groups in Germany and to a lesser extent in the Netherlands. Low handicap golfers from Scandinavia, the Netherlands and France seem to be more likely than other nationalities to travel in single sex groups.
- The US is seeing a rise in golf tourists travelling as couples and mixed groups, particularly on more expensive tours. Women in these groups may be non-players. There are some signs of interest in women-only led 'tours' from specialist tour operators, including an informal competition element, with some mainstream operators now widening their 'couples' products.
- Asia is experiencing high growth in women's golf participation rates and Asian golfers dominate the women's professional game, especially from Korea and China. This effect is not currently converting into major inbound tourism to Scotland from these areas, with women and couples preferring to visit destinations within a 3-4 hour travel time.
- Within Asia, China should offer the greatest potential in the longer term, but only if some issues e.g. around booking behavior, can be overcome. Relationships still need to be developed now in order to position Scotland as a key attractive destination when the Chinese golf travel market eventually matures.
- Spain is the major short haul competitor for Scotland for women golfers from Northern Europe, although long haul destinations are also becoming more popular. For Asia-Pacific golfers, Scotland competes with Thailand, Vietnam, China, Guam and the Middle East. For the US golfer, competition comes from Ireland, spa resorts in US, Caribbean and Mexico but increasingly also from SE Asia in general e.g. with operators offering Thailand, Singapore and China increasingly including tours for couples
- There are some challenges for Scotland's female golf tourism. Globally, women with families seem more likely to consider family and other commitments when planning golf holidays. This appears to limit the distance they are prepared to travel for golf and the amounts they are willing to spend. When they do travel, many reported that they want to be sure of good weather since their time away is precious.

1.2. KEY RECOMMENDATIONS:

- In the short-term the priority focus for adding additional visitor rounds should be on countries which combine relatively high numbers of women golfers, a propensity to visit Scotland and a visitor demographic which mirrors that of their female golfer populations. This equates to Germany, the Netherlands, France, Scandinavia and North America.
- Scottish clubs should be encouraged to present the attractions of their golf product in the same way as many Northern Europeans view the appeal of golf as a game i.e. as a unique sport which, thanks to the handicap system and forward tees, allows couples, families and participants of varying abilities to play together in a relaxed and enjoyable manner.
- For many trophy courses, the core golf visitor seems likely to remain male and British or North American for the foreseeable future and this market segment should clearly continue to be nurtured. However clubs with existing tour operator relationships should also discuss the potential to add in new offerings e.g. for couples. Promotional literature and websites could introduce or increase photos of mixed groups to present a subliminal message that women are also welcome.
- SE and SDI should inform its partners and the golf industry of the findings of this research and continue to work with the clubs and industry e.g. through the RGDGs and GTS, to help them to capitalise on the opportunities.
- The public sector has a role to play in facilitation and 'pump priming' at an early stage. Initial support through public sector initiatives could help to accelerate the development of appropriate golf itineraries, obtain higher profile coverage in press and social media and facilitate relationships between the overseas and inbound travel trade and with Scottish suppliers (clubs and accommodation). 'Best Practice' private sector initiatives (e.g. Kingsbarns' work in China) may also benefit from some external support in the pilot stages.
- The partners should consider working with the industry / private sector to ascertain potential for informal amateur tournaments, given the success and international interest in the Carnoustie Classic / Northern Ladies Open, which is frustrated by the lack of capacity.
- The SGU/SLGA should capture best practice from US/Germany in their approach to women golfers and use the findings of this report to help leverage culture change where required. Scottish clubs which become more women-friendly to members are likely to be more 'women-friendly' to golf tourists which in turn will increase revenue.
- There needs to be an improvement in data gathering to help inform marketing decisions. In future this should include reliable figures on gender and country of origin of visitors if at all possible.
- Women in general are high users of social media and online sources of information. To ensure Scotland's profile is raised as an appealing golfing destination for women, maximum use should be made of the women-focused online golf media, portals and bloggers in addition to published golf magazine targeting women.

2. INTRODUCTION AND BACKGROUND:

'Driving Forward Together', the Scottish Golf Tourism Development Strategy (2013-20) aims to establish Scotland, the Home of Golf, as the world's leading golfing destination by 2020. This strategy identifies the outstanding opportunity to capitalise on Scotland's golfing heritage and to continue to build a winning product offering.

Against this background, SE / SDI identified that golf demographics are believed to be changing globally, with female and mixed groups of golfers understood to represent a key growth segment of golf. This change has been reflected in the increased media profile for women's golfing events including the RICOH Women's British Open, hosted in Scotland. However the implications of the potential role of women's golf in developing Scotland's golf tourism were not directly and specifically highlighted in the 'Driving Forward Together' strategy.

The rise in women's participation and interest in golf represents a new and growing potential target market for Scottish Golf Tourism, particularly from England, Northern Europe and the US in the short-medium term. Women's participation in golf is particularly marked in northern Europe (Germany, the Netherlands, Austria, Switzerland and Scandinavia, but also France).

There has also been notable growth in Asia, particularly in South Korea and China, with interest driven by the professional success of Inbee Park and Shanshan Feng in the LPGA tour, and over 50% of the LPGA Top 100 coming from Asia.

Nevertheless participation rates and professional success are only part of the picture and must be overlaid with other criteria including propensity to travel, Scotland's appeal as a travel / golf destination and cultural considerations. A female golfer from overseas is not automatically a female Scottish golf tourist, and there are variations from country to country in terms of financial position, behavioural and cultural differences, time available, distances, costs and climate preferences alongside motivations for playing golf, some of which will affect both sexes and others which may impact more on women.

By further researching the market for women golfers, the results from this research project should help to further inform the Scottish golf industry strategy and SE / SDI's role in golf tourism as well as enhance the sector's role in delivering the overall Tourism industry strategy.

2.1. PROJECT SCOPE:

Scottish Enterprise wishes to better understand the participation of women in golf both in the UK and internationally, particularly in Scotland's key golf tourism markets of Europe, USA and Asia and to assess the potential of promoting Scotland as a destination for international women who play golf or encouraging mixed group golf.

As such, this research project has gathered information to enable SE / SDI to:

- a) Understand international trends in female golf participation and be able to evaluate the potential areas of opportunity for Scotland (and/or threats if the industry does not react / change) for both ladies-only and mixed groups
- b) Be in a position to inform and encourage its wider strategic partners and Scottish clubs, courses and associated golf tourism businesses to attract and cater appropriately for women golfers' potential market(s)
- c) Understand routes to market i.e. how to reach women golf tourists, including potential to encourage inbound and overseas based golf tour operators to promote both 'mixed group' and women's product offerings

Every effort was made to maintain a focus on the sub-segment of women's golf, although inevitably in some instances the findings will be equally applicable to golf tourism as a whole, given the inclusion of 'couples' or mixed golf.

2.2. METHODOLOGY AND APPROACH

2.2.1. Research Methodology:

➤ **A. Secondary desk/online research** as outlined in the brief was undertaken to identify and critique information from existing research sources with regards to:

- Current participation rates in golf for women, focusing on Europe, USA and Asia.
- Other evidence of interest in the target markets in women's golf / mixed golf
- Market intelligence on the potential market for Scottish golf tourism, key countries of origin, demographics, booking behaviour, trip characteristics, product satisfaction, visitor expenditure patterns.
- Evidence of existing 'competitor' product offerings for women's / mixed golf tourism groups in the key markets being reviewed and including both golf course-related offerings, golf-related organisations and the travel trade.
- Review of international media coverage of women's golf events (past and planned).

B. Primary Research: In the timescales available and given the scope of this exercise, response rates and feedback obtained from primary research were limited. Nevertheless it was possible to gather some useful information and insight from a cross-section of tour operators, golf clubs and collaborative marketing groups.

Whilst this was not a scientific weighted sample, this primary activity added considerable depth to the desk research exercise since it helped to gather qualitative information on potential / existing interest levels and attitudes. Contact was made with using a mixture of telephone interviews, face-to-face interviews and emails. A short online survey was prepared but it proved impossible to obtain access to IAGTO members or SGU 'trusted clubs' to make this a viable data gathering route in the time available.

A list of targets approached for this gathering of 'primary' data and feedback is included in Appendix 1(B). Broadly speaking, this included a cross-section of the following:

- Golf tour operators (both UK based and based overseas in the target markets within Europe, the US and Asia) with particular focus on those with track record of featuring Scotland in general and/or women golfers
- Golf courses / clubs in other countries (identified during the secondary research phase) with existing offerings aimed at women / mixed golfers and /or where women's golf participation rates are higher than in the UK
- Scottish Golf courses and clubs to ascertain existing provision / awareness / interest / any issues
- Key organisations active in promoting Scottish golf and golf tourism plus relevant international organisations

2.2.2. Statistics and data collection issues:

It is believed that reasonably accurate statistical participation information was obtained for all of the key markets with the exception of China, where there were difficulties in accessing China Golf Federation (CGF) statistics, the accuracy of which may in any event be questionable. CGF statistics were obtained from several secondary sources and are believed to be as accurate as any figures publicly available.

In terms of analysis of golf tourists visiting Scotland, there continues to be a lack of quality data gathered by clubs on origin of visitors and distinction of staying visitors from day trips. In analysing data contained in the Golf Tourism Monitor, this caveat must be borne in mind when considering and using certain quantitative data.

Although increasing numbers of Scottish golf clubs appear to have now been encouraged to offer at least partial tee time booking, very few clubs are using their online booking engines as a source of valuable marketing information, including missing out on opportunities for gathering origin data and potentially gender data (although many systems appear to only collect names and 'titles of the lead player making the booking and not all players, this would at least give a better indication than the current one). This represents an opportunity for the future.

3. TRENDS IN WOMEN'S GOLF PARTICIPATION:

As Table 1 (below) shows, the UK and Ireland have significant gender differences in their golf participation, with the US also relatively low, but now believed to be rising significantly thanks to the success of a new initiative from 2012-13. Information from the SGU /SLGA indicates that club membership figures for 2012 showed that adult women's membership has fallen more sharply than men's membership, by 26.88% since 2004 compared to 14.59%.

Anecdotal feedback and Scottish Golf Monitor figures indicate that Scotland's Golf Tourism has continued to rely heavily on the domestic market followed by visitors from the US. On the face of it these figures represent a worrying trend for Scotland's golf tourism including women's tourism unless either a) Scotland can capture more of the potential golf market offered by the rapidly growing European and Asian markets, including the high proportion of female golfers and b) women's golf participation increases in the UK and US (with the latter now happening) and these women convert into golf tourists.

'the US achieved a net gain of 260,000 additional women golfers during 2013.....'

A detailed analysis of the causes of the decline in female golf participation in the UK and US, and how these might be remedied - or are already being remedied in the US - is outwith the scope of this study. The participation / membership issue is currently being addressed within Scotland by the SGU / SLGA as well as by their counterparts in England and the US. However in the latter case, in April 2014 it was ¹announced that the US had added 260,000 additional women golfers in the previous year, believed to be a result of initiatives such as Golf 2.0 and 'Connecting with Her' from the PGA, as well as possibly reflecting a general economic upswing. Given the relevance to the Scottish position, information on these initiatives is supplied in Appendix 2 since it can be assumed that they will also relate to some extent to the requirements of the US female golf tourist. Significantly there were a number of overlaps between a US Longitudinal study in 2011 (see Appendix 2) and the 2013 UK study by ²Syngenta into how to grow women's golf.

¹ At the HSBC Golf Business Forum in Abu Dhabi, by Giles Morgan, HSBC's global head of sponsorship and events – see <http://bit.ly/1jtZPJ>

² http://www.greencast.co.uk/media/609423/syngenta_growing_golf_in_the_uk_summary_report.pdf

There is in any event a certain interface between golf tourism and concerns around gender participation rates for three reasons:

1. Some of the causes of the drop in local women's participation in Scotland/ UK /US may well also affect Scotland's potential attractiveness as a destination for visiting women golfers (and their removal could help increase appeal).
2. Understanding the behaviours and demands of women / mixed group golfers of other nationalities as golf tourists may help identify solutions for the Scottish gender inequality problem.
3. Failure to attract women golfers may ultimately impact further on male golfer participation and golf tourism, given changes in gender roles in society.

3.1. WOMEN'S GOLF PARTICIPATION – ANALYSIS OF CURRENT POSITION

Country	Total Golfers	% of women Golfers	Total women Golfers
Domestic:			
Scotland	*292,997	16%	*45,793
England	#744,163	15%	#111,624
UK and Ireland	1,252,836	14%	180,331
Europe:			
Germany	635,097 (**637,735 DGV)	35% (37%)	222,287 (**238,071 DGV)
Sweden	491,401	27%	131,836
Netherlands	388,493	32%	124,505
France	422,761	25%	107,647
Denmark	152,972	28%	42,832
Austria	104,736	35%	36,658
Switzerland	85,758	33%	28,300
Norway	110,362	23%	25,383
Belgium	57,074	31%	17,693
Europe Total (32 countries)	4,386,928	23%	1,008,993
USA	***25,300,000 (core golfers c. 14.8m)	20% (now believed to be rising)	***5,000,000
Asia			
Japan	9,239,000 (Japanese Official Sports Stats, 2012)	18% (now believed to be 20%)	1,646,000
S Korea	4,830,000 (2013, KGF)	35.1%	1,700,000
People's Republic of China	Stats unreliable (358k – 2m)	c. 13-25%?	Stats unreliable (Various sources)

Table 1: Key markets – Women's Golf Participation (2013 figures unless otherwise stated).

Notes: Source unless otherwise stated is KPMG 2013. All KPMG figures exclude females under 16 (classified separately as Juniors) NB UK and Ireland figures are under-stated as only capture members/registered golfers (non-compulsory in UK and Ireland) but gender split is believed to be accurate

*Calculated by applying GRO Scotland census data figures (2012 update) to SGU figures for % of population (16+) playing golf, by gender

**DGV December 2013. Figures include Junior golfers, divided by gender.

***NGF 2012, Ages 6-Adult. Core golfers = 8 or more rounds p.a.

2012 figures. Source 'Strategic Framework for England Golf 2014-2017'

4. INTERNATIONAL GOLF TOURISM: AN OVERVIEW

Golf Tourism is defined in a number of ways but for the purpose of this report has been taken to encompass golfers travelling to play golf as a main motivation for a trip in addition to those travelling to spectate at major tour events. Clearly, only a proportion of golfers in any country will become 'golf tourists' and women represent yet another sub-group of the overall golf tourist population.

Established in 1997, IAGTO, the International Association of Golf Tour Operators, is the global trade organisation of the golf tourism industry. Given the breadth of its membership, its surveys are useful barometer of golf tourism: IAGTO has over 2,100 member golf resorts, golf courses, hotels, tour operators, tourist boards and other golf tourism suppliers in 97 countries, including 520 golf tour operator members in 62 countries, which control more than 85% of golf holiday packages sold worldwide and which collectively have annual sales of over US\$2 billion. IAGTO stages the North America Golf Tourism Convention and Asia Golf Tourism Convention each year and establish the main golf tourism trade fair (IGTM - International Golf Travel Market) and the influential Golf Travel Writers Association in 2000.

IAGTO's annual golf travel survey has now been reporting consistent growth for the past 2 years. Headline figures drawn from its 2014 Golf Tourism Survey, which analyses data for 2013 supplied by over 650 IAGTO member golf courses, golf resorts, hotels and golf tour operators, show that golf tour operators' holiday sales globally have grown by an average of 21% since 2011 across a wide range of countries including Scotland. According to Peter Walton of IAGTO, all the indications are that this trend will continue in 2014, which will then mark three years of consecutive growth since 'bookings taken in January 2014 are 14.5% ahead of bookings taken in the same month [in 2013]'. Overall, Scotland continues to be ranked highly (in the top 5) by both IAGTO and KPMG in terms of being a popular golf destination.

The same 2014 IAGTO ³Golf Tourism Survey also included a small number of questions specifically on female participation in golf travel, which were answered by around half of all respondents. 56% of those who were able to answer a question on trends in female golf travel answered that they had seen an increase over the past 3 years, with golf courses more likely than other categories to have noticed this (at 66%).

However growth in women's golf travel was reported most consistently in Mediterranean Europe, Asia and North African destinations, where the percentage of suppliers reporting an increase in women golf traveller arrivals was over 70%. The percentage was lowest in non-Mediterranean Europe i.e. including Scotland, at just 29%. Markets showing the highest rise in women's golf travel were South Korea and China. However information from other sources, highlighted under country profiles, suggests that their own domestic markets and other Asian countries appear to have benefited most from this business. This suggests that Scotland will have to look more widely than Asia for its women golf tourists.

4.1. GOLF TOURISM IN SCOTLAND: GENERAL

According to the 'Driving Forward Together' (DFT) strategy, in 2012 some 122,825 golf tourists came to Scotland (having declined from 2011 and 2010), playing on average just over 5 rounds each. 70% of these visitors came from the UK and Ireland. In terms of green fee revenue from visiting golfers, according to the KPMG / Oxford Economics report published in June 2013 ('Value of Golf to Scotland's Economy'), of the 33% of visiting golfers

³ NB The information from this IAGTO survey document is pre-publication and was supplied on the basis that it must be clearly credited to IAGTO and is not for wider public circulation at this stage.

(assumed to be around 40,532 golfers, using the DFT figures) paying green fees who came from outside Scotland, 57% were from the rest of the UK, 19% were from Europe (7,701), 17% from North America (6,890) and 8% (3,243) from elsewhere including Asia. Visitor figures are believed to have risen in 2013 by just under 3%, possibly due to a combination of better weather and the holding of the Open in Scotland in 2013.

Although presented in a different way, these figures are roughly similar to the Scottish Golf Monitor (SGM) provisional figures for 2013 in terms of relative market importance, which show the dominant country of origin for golf visitors in Scotland is the UK, showing 74% from Scotland, 14.6% overall from the rest of the UK. SGM figures do show North America ahead of Europe, with 5.16%, 4.83% from Europe and 1.92% from other overseas.

There is no doubting the very high economic benefits which golf tourism already offers to the Scottish economy as identified in the KPMG report, estimated at around £120m or £220m annually if green fee revenues are taken into account, and employing some 1,480 people directly. Although international golf tourists may be in a minority, it is well documented that international tourists in Scotland spend 2.5 times more than domestic tourists (and although just 17% of visitors they account for 34% of spend) and global figures suggest that golf tourists spend considerably more than other tourists. For example in St Andrews in ⁴2010, 30% of visitors were from overseas (assumed to be mainly golf tourists) but accounted for 70% of the tourism spend.

However when actual numbers of international golf tourists coming to Scotland are compared to the numbers playing golf in Europe overall and correlated with general tourism numbers from certain European countries, the figures do appear to underline the level of untapped potential for Scotland in terms of golf tourism from Europe and beyond.

The profile of golfers, including women golfers in countries such as Germany, France and Switzerland in particular appears to correlate well with the overall profile of visitors to Scotland from these countries (e.g. 45+, travelling in couples). For example, in ⁵2012 there were some 281,000 tourist trips to Scotland from Germany and 174,000 from France, both countries with relatively large and growing golfer populations. Yet this does not currently appear to be reflected in the number of visiting golfers from these areas. Considering US female golfer numbers (5m+) and figures for US visitors to Scotland (324,000 in 2012) in absolute terms rather than as a %, these also suggest that there is still considerable potential for growth, as anticipated in the ambitions for the overall DFT strategy, and for women's golf.

4.2. GOLF TOURISM: GENDER TRENDS

Whilst there is undoubtedly a strong correlation between levels of women's sports participation and major successes by female professional players, the correlation between the overall population of female golfers and the tendency to travel recreationally as a golf tourist is less pronounced. Factors such as cultural norms, family responsibilities add an additional layer of criteria alongside non-gender specific concerns such as travel time and affordability.

By far the most common golf tourists in Scotland are single sex groups of male golfers. Unfortunately, the Scottish Golf Monitor does not currently measure gender split of visitors. Anecdotally, single sex groups of women golfers coming to Scotland were said to be rare ('just a handful each year') and most likely to be from Scandinavia (Sweden, Norway and Denmark), France or the Netherlands, although very occasional groups were noted from the

⁴ Source: Scotinform for St Andrews Partnership 2010

⁵ VisitScotland 'Tourism in Scotland's Regions 2012'

US. Women visitors from Germany were most likely to be playing in a mixed group, usually 2 or 3 couples, all golfers.

There did seem to be an increase in mixed groups with non-golfing women accompanying. This appeared to be most common from long-haul countries of origin or where the group was staying in a 'luxury' package. As noted elsewhere, this couples trend was attributed to both social change and to the reality of women's increased financial contribution to household income – therefore leading to an increase in input into its expenditure.

One explanation for the apparent low take-up of single sex or 'girls-on-tour' type golf holidays in Scotland can perhaps be found in the differing travel behaviours between male and female golfers. Globally, women with families seem more likely than men to consider family and other commitments when planning golf holidays. Although they often control the purse strings, this appears to limit the distance they are prepared to travel for golf and the amounts they are willing to spend.

Whilst on the face of it this would appear to be an opportunity for Scotland to attract this category of women golfer from England and near Europe, many women reported that when they do travel, they want to be sure of good weather since their time away is so precious. They will therefore often choose destinations such as Spain for their shorter 'girls on tour' type breaks. For some in the south of England, travel to Scotland can seem as time-consuming and expensive as travel to Spain. Unless the message is well-communicated, many will not realise that the East coast of Scotland in particular often appears to benefit from a sunny (or at least dry) micro-climate and that green fees can be relatively competitive at many non-trophy but nevertheless spectacular courses. This may also indicate that target women golfers for the Scottish market are likely to be older (45+) with fewer family commitments and for whom a short break is not such a rare treat.

4.3. SCOTTISH GOLF TOURISM AND WOMEN: A SWOT ANALYSIS

The SWOT analysis below summarises Scotland's current strengths and weaknesses in terms of being able to attract and service international women golf tourists. It highlights the potential opportunities which appear to be offered by the growth in women's golf tourism, balancing these with some of the threats which may be faced if the country and industry fails to capitalise on its strengths or eliminate its weaknesses.

Changes and product developments which may be required to meet the demands of inbound golf tourists are discussed below in Section 7, following a detailed examination of the target market priorities in terms of geography and a consideration of how these markets can be targeted.

In general, the presentation of information on golf is, perhaps unsurprisingly, geared at the current predominant type of golf tourist i.e. groups of men planning to visit one specific area or touring well known trophy links courses and their surrounding 'qualifying courses'. This type of visitor is clearly extremely important to Scotland's golf tourism and will hopefully continue to be so, hopefully also complemented in future by a growing number of all-female or mixed playing groups seeking a similar experience.

However if Scotland is to also develop an additional market from the growing numbers of European golfers who see golf as a gender-neutral activity for all, it may need to also present information in a way that will persuade couples and families that they can integrate golf into an enjoyable 'general' holiday to Scotland, as one of several activities and experiences to be enjoyed. This may help to improve the chances of Scotland being chosen as a holiday destination in the first instance for Europeans, including those on short breaks or second holidays, in addition to increasing spend and length of stay.

SWOT ANALYSIS – Scotland’s potential for Women’s Golf Tourism

STRENGTHS:	WEAKNESSES:
<ul style="list-style-type: none"> • Scotland ranked #3 Golf Tourism ‘hotspot’ destination in general in 2013 and #4 most important destination in 2014 (IAGTO) • Higher profile and exposure in terms of women’s golf due to RICOH Open e.g. at Carnoustie in 2011 and St Andrews 2013 • Variety of courses and ‘Hidden Gems’– good for higher handicaps and families • ‘Home of Golf’ / Heritage • Quality of courses / Links / Trophy Courses • Improvement in offering for women including retail / clothing e.g. Gullane ‘as much ladies golf clothing as men’ • Standard of teaching • Appeal of wider tourism product • Regarded as safe destination • Good direct flight connections + general tourism visitor numbers from growing golf markets with higher female participation than UK (e.g. Germany, France, Netherlands, Denmark, Norway, Switzerland) • 20% overall growth in golf travel trade sales in last 2 years + healthy outlook (14.5% growth) forecast for 2014 	<ul style="list-style-type: none"> • Too distant for Asian golfers / connectivity • Climate • Cost • Lack of ‘presentation’ / proactive targeting of women, couples, families by courses, clubs and accommodation • Single sex male groups are the main focus for many tour operators (especially from US) • (Perception of) golf as male-oriented sport in Scotland • (Perceived?) Lack of facilities for women / vestiges of ‘male-only’ restrictions and lack of mixed rounds at peak times on some courses • Attitudes of some members (including Lady members) to visitors (not just confined to women); culture at some clubs • Lack of flexibility to play shorter rounds • Lack of good, relevant quantifiable data from supply side on which to base marketing decisions • Some trophy courses can appear daunting to women • Online tee booking is inconsistent • Low inclusion of Scottish product by women-only golf tourism specialists in UK and North America • Lack of easily accessible info on lesser known courses + info is generally ‘regionalised’
OPPORTUNITIES:	THREATS:
<ul style="list-style-type: none"> • Larger market: Higher – and growing- numbers of female golf participation in Europe (especially Germany, Netherlands and Sweden) • High levels of interest generated by top ranking pro women golfers in Asia, especially Korea, China and Japan (also encouraging male golf tourists) • US golf recovery – including growth in women • Scotland’s association / profile as women’s golf destination: Ricoh 2011, 2013 + at Turnberry in 2015 (other Scottish courses in 2017 & 2019?) • More informal mixed tournaments • Casual family / couples golf: e.g. to Hidden Gems off key tourist routes with hired clubs (pre-advised of opportunities so they have option to bring clubs/shoes if preferred) • More specific targeting of packages for women and couples (through travel trade) • New direct flight routes (short breaks) • Reduction in gender-based restrictions + work being undertaken by SGU • Overseas memberships (Germanic countries) 	<ul style="list-style-type: none"> • Failure to act / exploit the opportunities • Capacity reached for ‘trophy’ courses + Old Course tee times system – issue for Chinese booking behaviours • Lower (and decline in) participation in key UK market of golfers + women golfers (tho’ now being tackled and US has had some success) • Failure to interest women golfers/golf tourists (as part of mixed groups or single sex) may begin to impact on male golfer numbers • Weather e.g. very bad weather during major televised competitions such as Ryder Cup and Ricoh • Competition: Rise in spa resorts in ‘sunny’ golf destinations – seen as more appealing to some ‘single sex’ women’s groups + to couples where golf is part of a ‘holiday’ + new golf destinations in Far and Middle East • High-profile media coverage of ‘anti-women’ e.g. if R&A vote goes against admission of women + Media confusion between R&A governing body and club (media) • Any negative change in direct flight routes

5. FROM PARTICIPATION TO TOURIST: TARGET COUNTRY PRIORITIES

In 2011, a study undertaken for Scottish Enterprise assessing Golf Tourism's future growth potential to 2020, consultants SQW published forecasts for the volume and value of overall overseas golf tourism to Scotland from 2010 to 2015 and then to 2020. These highlighted the main potential for growth as coming from Germany, France and the Netherlands alongside China and India, with the US and Scandinavia seen as less important markets for growth.

Whilst this study broadly reached similar conclusions, especially about the importance of Germany, the Netherlands and France, there were believed to be some differences in prioritisation. These stem partly from the different travel behaviour of women golfers and partly from changes in circumstances (including economic) since the 2011 study was published.

For women's golf, it is considered that Scandinavia has potential alongside the other three main European countries. It is also considered that in long haul markets, golf tourism into Scotland from the US has potential to grow providing there is continuing interest and growth in development of new 'couples' packages, such as the products offered by Perry Golf. This is further validated by recent evidence that the US is now managing to address its own gender imbalances in golf participation and promising signs of an upturn in the overall US golfer participation figures and golf travel figures from 2013. Conversely, research showed that although India does have increasing numbers of women golfers, and a specialist women's tour operator, golf travel appears to be predominantly domestic, to the UAE or to SE Asian destinations.

India was also not highlighted by respondents to the IAGTO survey about women golfers. Suppliers responding to the 2014 IAGTO survey (i.e. golf courses, resort and hotels) questioned said they had noticed a higher than average percentage of women golfers coming from the following markets, ranked in order. It must be remembered that this was a global survey in terms of the supplier location so this list cannot be assumed to be a ranked target list for Scotland. However it does give an indication of countries of origin 'producing' female golfers who will travel, which can then be correlated with existing international visitor travel patterns into Scotland, using both statistical and anecdotal evidence.

- 1 Germany
- 2 United Kingdom
- 3 Sweden
- 4 France
- 5 USA
- 6 South Korea
- 7 Switzerland
- 8 Canada
- 9 China
- 10 Denmark
- 11 Netherlands
- 12 Norway

This analysis seems to suggest that there is already a certain overlap between Scotland's current inbound tourism patterns in general and all countries of the top 12 'producing' countries of women golf tourists listed here, with the exception of South Korea and China, which would be seen as longer term targets.

More detailed information is given on a market by market basis in the country profiles below. Growth in inbound women's and mixed golf tourism to Scotland from Asia is seen by most to be a longer-term proposition, although Scotland does need to be positioning itself now to take advantage of the potential when the market matures. Growth is expected to be comparatively slow, with certain segments of women golf tourists from Japan and Korea who do travel apparently tending to favour the closer Asian destinations such as Thailand, Vietnam or Malaysia. Inbound tourism to Scotland from Korea is currently very small. A number of operators and accommodation providers expressed some disappointment with the relatively low numbers being produced from Asian markets at this point compared to expectations.

Numbers of Chinese golf visitors in general are likely to grow eventually due to the sheer potential size of the market, providing both clubs and operators are willing to invest time and money in building relationships with clubs and the outbound travel trade and if difficulties e.g. in terms of Chinese lack of forward planning and payment, can be overcome. These are described in more detail in the China country profile. It will be interesting to see the results of an inbound familiarisation trip from Mission Hills which is expected to arrive shortly at Kingsbarns, following their attendance at the Asia Golf Tourism Convention (AGTC) in March 2014.

Although it is not yet clear what proportion of group tours from China are likely to be mixed gender, it seems likely that at the highest end, women who are members and affiliate of clubs such as Mission Hills will wish to participate in any 'trophy trip' to St Andrews. The average duration of inbound trips from China which are devoted to golf are expected to be shorter than those from the US, unlikely to average 5 rounds of golf, and to be focused in and around St Andrews.

It is also expected that organised luxury trips for Chinese visitors which include golf alongside other top-end experiences (including luxury shopping) are increasingly likely to be mixed gender groups, following the pattern of visitors from other long haul countries of origin are likely to be mixed groups. This does not automatically mean that all of the women will actually be playing golf, either at all or as much as the male group members, but reflects Chinese women's influence in both earnings and major expenditure.

5.1. Key Country Profiles:

For Scotland to be in a position to market its golf product appropriately to women, it must take steps to understand these target customers and tailor the approach accordingly. There are variations in behaviour, expectations and requirements from country to country.

5.2. Europe:

5.2.1. UK – England

Although the domestic market was not within the scope of the brief, and women's golf participation is declining in England, it was felt that England did merit a mention in this report as it could still represent an important potential market for Scotland given the relatively high proportion of visiting English golfers who play as visitors in Scotland (albeit anecdotally mostly male to date) and the close proximity of over 111,000 English women club member golfers. There is also a specialist women's golf tour operator, profiled below. The main barriers to women golf tourists coming to Scotland appear to be similar to those facing men – distance / time of journey, cost and weather, although the latter appeared to be of greater concern to women, more of whom seem to consider themselves fair-weather golfers. English-based consultees felt that Scotland was 'no worse' than England in terms of male bias in golf, a 'tradition' which was mainly met with resignation even if a culture change would be welcomed. On the other hand, the view was expressed that the friendliness of the welcome as a visitor at a course was very important, whereas a club with too many rules and an atmosphere of intimidation with regards to ability or gender seen as a distinct turn off.



Tour Operator Profile: Red Tee Breaks Ltd www.redteebreaks.com

*A relatively new company, run by Sarah Forrest, RTB claims to be **the only golf tour operator in the UK specialising in women's golf holidays** (although they will also organise trips for male golfers on request). Certainly no other specialists were uncovered during this research.*

From the Autumn, Sarah will be a regular contributor to a radio programme in Washington DC and expects this to help boost US trade. She will also be involved in writing a number of blogs and e-zones. RTB exhibited at Ricoh WBO in St Andrews last year and generated a number of enquiries e.g. from Lady Captains looking for arrangements for awaydays and short stay groups of 20-30. The company prides itself on only recommending golf experiences (courses and hotels) which its counsellors have experienced personally. Current offering is therefore mainly English-based, apart from Craighelaw, in addition to outbound trips to Spain, Portugal and Cyprus.

Sarah played as a guest in the Carnoustie Classic in May 2014 and also visited a number of other courses including Gleneagles, in addition to familiarising herself with other attractions near the courses including speciality food and drink. She will now be expanding her Scottish offering over the next few months and promoting this both to English clients and the growing number of overseas women golfers who have made contact or are following her on Twitter / 'Likes' on Facebook. These are mainly from England, Norway, Germany, Spain and North America.

Clients are mainly 'serious' golfers and course quality is important. Apart from the golf itself, the main criteria are price, timing, travel distance and weather. All women's groups put emphasis on comfort of accommodation. Has not encountered any issues for English golfers re sexism in golf Scotland.

In addition to the above RTB are planning to start a series of 'fun' regional open women's 'Tours' or tournaments across the UK. At least three locations are planned with finals being held at a fourth equally prestigious golf location. She would love to include a Scottish event and would be happy to discuss this with whichever body or bodies would be most appropriate. Member of IAGTO.

5.2.2. Germany:

'The UK now has 40,000 fewer female golfers as members of clubs than Germany, despite having four times as many golf courses and Scotland being the 'home of golf'.....'

In Germany in particular, golf is seen as a sport which, thanks to the handicap system, offers an ideal opportunity for men and women to share leisure time. 81% of Germany's women golfers are over the age of 41, with a peak particularly in the 61+ followed by 41-50 year olds. The age distribution pattern is roughly similar at around 35-37% across all ages apart from the 56-60 age group where women make up 43% of the total. There are over 120 female golf pros registered with the PGA in Germany and many, such as Hanna Baum-Proske of Cologne Golf Club will organise a golf trip to a sunny destination in the winter as well as organising events. These will generally be mixed gender.

In the words of a Scottish pro working in Germany: *'The whole concept is totally different to the UKAll the German golf clubs I have visited are set up to cater for everyone - men, women and children without bias towards any particular sex. This is in stark contrast to some of the more 'traditional' clubs in the UK, whose bias towards men's golf is utterly blinding. I don't know if this is changing in the UK, as I have been away for quite a while, but before I came to Germany that certainly was the case in most clubs'*.

Germans seem to be almost obsessed with stories about sexism in UK golf and seem more aware of this than in any other country outside the UK and US, if online coverage can be taken as a measure. A Google search in German of golf + Scotland + women unfortunately throws up multiple reporting around the R&A vote this September on admitting women members. Many of the articles tell the same story of 'no-dogs-no-women' notices on UK courses in the past (England as well as Scotland) as do a number of golfing blogs by or for women golfers, with the tone varying between incredulity, amusement and derision! Whilst it is not known if this aspect has been off-putting to German lady golfers considering playing in Scotland, it is known that many German golfers tend to be easily intimidated by difficult courses and all but the low handicappers would probably be reluctant to play trophy courses during a trip to Scotland. However they do not seem to be particularly well informed of the many other excellent and accessible courses, unless they have already visited Scotland.

In summary German women golfers tend to:

- Be relatively affluent
- Play and holiday as couples / mixed groups
- In common with German male golfers, have relatively high handicaps
- Feel intimidated by 'difficult' and trophy courses
- Find single sex clubs anachronistic and the butt of jokes
- Are happy to be paired to tee off with male golfers who they don't know
- Expect their own golf clubs to be family friendly (at younger 40s end of spectrum)
- Enjoy informal competitions and tournaments, often involving a series of ⁶weekend stays across the country (NB although there are some separate Men's and Ladies competitions, these tend to be the exception with most being mixed.)

⁶ 'Hotels Auf Dem Golfplatz' is a consortium of 24 hotels across Germany, Austria and Switzerland which are all within a 'Par 4' i.e. 430m max of a quality 18 hole golf course. 'Loyalty' packages allow for play in a series of tournaments, targeting couples, to be played throughout the season around member hotels, encouraging short break travel. <http://bit.ly/1kQ8btL>

- Travel a lot to play golf – most German clubs have green fee arrangements with other clubs, which enable their members to play at a reduced rate at other courses.
- Take winter golf holidays in the sun in mixed groups of couples, often organised by their German pro, with spa facilities seen as a bonus. Long haul trips including North Africa and Middle East and Far East are increasingly popular, as is an annual golfing week in Turkey.

Possible opportunities for Scotland from German women golfers:

In addition to the usual 'organised' male groups for low handicappers, targets are:

- Women as parts of 'couples' and families rather than 'single sex' golfers – may be a need to educate clubs to understand German golf culture.
- Encourage golf visits by Germans travelling independently 'on holiday' in general but who are also golfers and who may not appreciate that they can play casually / hire clubs at low cost at many 'Hidden Gems' along their route, especially those who are touring by car up the A9. This also reduces pressure on trophy courses, and may actually be more suited to the average German golfer.
- Tell 'stories' (and obtain PR coverage) which will appeal to the German's love of British / Scottish eccentricity e.g. the quiet Strathtay course which has a significant group of members from Germany, Switzerland and Austria, appreciating the low cost annual membership (less than one round at some other Scottish courses) yet which gives them a useful handicap certificate for play at other overseas clubs – particularly useful in the face of the Germanic Platzreife system. Or the highly unusual Brahan Golf course in the Highlands, 'self-built' by an English Pro and his German wife.
- Whilst spend at smaller courses will be less, better (advance) information about the opportunities could make the decision to choose Scotland in the first place, extend the stay and improve the satisfaction levels. Accommodation providers can play a key role.

5.2.3. Netherlands

With nearly 125,000 women club members, golf is now the fastest growing sport among women in the Netherlands and is now the third most popular sport in the country for women and girls. Despite this, very few of the consultees mentioned having bookings from Dutch women golfers, although some courses in East Lothian mentioned that they had had some small groups in the past, and a small group of Dutch golfers from one particular club regularly competes in the Ladies Northern Women's Open held each September over the Carnoustie Championship Course.

The Netherlands has also seen an increase in women wishing to use golf as a business networking tool. Match & Mentor, a business networking organization includes golf (for both sexes) amongst its activities, and an annual business and golf networking event has been held annually for around 150-200 women since 2010 (Zakengolfster – see <http://www.zakengolfster.nl/>)

The Netherlands does not appear to have a dedicated women's golf magazine or portal, but www.golf.nl reckons it reaches a very high proportion of Dutch golfers through its multimedia presence (portal + hard copy Golfers Magazine).

A number of golf tour operators in the Netherlands e.g. do offer Scottish golf holidays to a range of courses (see Appendix 1), although most also feature Spain and Portugal and destinations further afield as well as Ireland and England. None appear to specifically mention women or couples. A search in Dutch looking for women, golf and Scotland depressingly only found references to the R&A club vote on women members.

There are a number of Dutch language sites such as

<http://www.golfreiswijzer.nl/nl/land/23/golfen-in-europa/schotland/> and <https://nl.leadingcourses.com/europa+verenigd-koninkrijk+schotland/> giving detailed information on Scottish golf courses which suggests a demand for independent travel from the Netherlands.

Possible opportunities for Scotland from Dutch women golfers:

- Educate – and obtain PR and blogger coverage - on 'Hidden Gems' – as with Germans these will appeal to independently travelling couples, with more emphasis on family golf play for Dutch visitors. The low costs /excellent value for money will also appeal to many Dutch golfers.
- Dutch women golfers have shown interest in attending Open tournaments and travelling in single sex groups – any new tournament initiatives could be promoted more widely, including to business women's networking groups.
- Further development of 'group' products in conjunction with tour operators, catering for women

5.2.4. Scandinavia

There was some evidence of existing interest in Scotland from Scandinavian women golfers, particularly in the shoulder months i.e. April/May and August/September. However there was some feedback that many Scandinavian lady golfers on single-sex trips tended to visit southern Spain in winter, with guaranteed sun and the availability of spa hotels being high on their list of requirements. New Far East golf destinations were now also beginning to interest this category.

Whilst male golfing groups still dominate Scandinavian golf tourism, a number of the Scottish golf clubs contacted mentioned receiving a small but regular single-sex groups of Swedish women, keen to stay in comfortable accommodation but in terms of activity with full focus on golf rather than combining this with other activities. Norway was also mentioned by a number of courses and also by Red Tee Breaks, although they had arranged an English-based trip for Norwegian clients to date as they had not yet developed their Scottish product at that time. Carnoustie had a number of Danish women competing in the 2014 Carnoustie Classic, some of whom were from clubs also represented by male entrants. There were said to be many more Danish women who would have liked to have played the tournament but could not due to lack of capacity.

It was mentioned by some that quite often Scandinavian women seemed happy to book direct with clubs, possibly due to better language skills, sometimes booking hotel accommodation first and then asking for recommendations about courses. East Lothian golf courses attributed at least some of the interest to marketing activity including successful visits to Scandinavian consumer golf shows and from articles written by a number of golf writers who had visited the area on fam trips arranged by Golf EastLothian (although not specifically highlighting women's golf). They had also developed relationships through the Swedish Golf Federation.

One Swedish tour operator (Spela Golf) commented that in his experience 10% of his business, both overall and for Scotland was from large, mixed groups, with the remainder large single-sex male groups. His assumption was that larger groups still needed to use a tour operator because of the difficulties of securing and managing multiple tee times and hotel rooms. He had seen no growth in the numbers of mixed groups interested in Scotland in recent years but did feel that overall groups in the last 2-3 years had been prepared to spend more money on their golfing trip.

Possible opportunities for Scotland from Scandinavian women golfers:

- Ensure that relevant information is readily available for women DIY group organisers

- Work closely with accommodation providers
- Larger clubs and RGDGs can develop relationships with the Swedish Golf Federation to attract pro-led tours in the shoulder months

5.2.5. France

Several Scottish courses (including Dunbar and Carnoustie) mentioned that they had received bookings from 'small groups of French women' through French-based tour operators, while St Andrews Golf Experience, one of the main operators handling inbound golfers from France, felt that women were mainly non-golfing 'accompanying partners' or occasionally playing one or two games, they did have at least one regular group of 8-10 women each year – still very much in the minority given that they handle over 2,300 groups per annum.

One French operator (Tee Off Travel) also runs a golfing / networking business club (Club 42.67) which emphasises it is open to both men and women (although it was not possible to obtain a gender split of current members) which was a new development. www.teetravel.com and <http://www.leclub4267.com/>. This club offers bi-monthly dinners and golf travel / outings for business men and women (including to Carnoustie in May 2014 around the Classic), a relationship which appears to have been nurtured by Angus Council.

Where there had been a degree of investment in marketing and building tour operator and golf club relationships e.g. as carried out by Angus Council or St Andrews Golf Experience, it was indicated that the French market had responded with interest, suggesting that there is untapped potential.

Possible opportunities for Scotland from French women golfers:

- Consider that many French will use a tour operator due to language fears – so suppliers need to be on their radar (both the Scottish based and inbound operators)
- Raise the level of awareness of women's golf in Scotland – here are niche online portals which offer access to women golfers
- Make contact with women's golf networking groups in France
- (Not strictly 'women' but connected) - Capitalise on the huge investment France is making in developing Junior Golf as part of its commitment to the 2018 Ryder Cup – Scotland has experience from KidsGolf of handling young players and there are facilities such as Elmwood which can provide accommodation

5.3. Country Profile: USA

The 'traditional' single sex men-only 'buddy trip' from the US, mainly playing links and trophy courses, has for many years been a staple of Scottish golf tourism. This is expected to continue and increase with the recovery of the US economy. However there are signs that more women are beginning to accompany these groups, albeit often as non-players, and the new growth in women's golf in the US combined with the emergence of tour operators catering for women golfers and an emergence of professional women using golf as a business tool, may help to stimulate more women's groups (single sex and mixed.)

For many years the US has seen declining numbers of golfers, both men and women. As explained earlier, there were signs by the end of 2013 that significant initiatives to reverse this decline and encourage women golfers have begun to pay off with a net increase in 260,000 women players over 2013.

The US has also explored 'crowd-sourcing' as a way of gathering ideas on how to improve golf membership and these include a number for women's golf. These are contained on the Hachkgolf.org website e.g. <http://www.hackgolf.org/hackathons/golf/contribution/courses-need-make-women-feel-more-welcome-they-are-missing-fastest-growing-segment> and

mention topics such as 'Stop the intimidation' (where families are discouraged from bringing children to play, women are made to feel unwelcome, less skilled players are told to pick up if they hold up the players behind them.) There is also a plea for fun Par 3 courses, which Scotland could certainly offer. The message behind the suggestion that 'We should focus much more on cultural change rather than infrastructure change' is one which some Scottish clubs may wish to consider. Reading both Hackgolf and the initiatives reports (for which a summary is contained in Appendix 2) will give clubs an insight into what the American female golfer is looking for if she is to consider trips to Scotland similar to those undertaken by men. In particular, the importance of a welcoming environment appears to be one of the keys.

According to Suzanne Woo, author of 'On Course for Business: Women and Golf', writing for Par Excellence Magazine



'The fastest growing group of golfers is women ... business women. ...Golf for business women is becoming an important factor for women who want to increase their success in business'

There are a number of emerging women's network groups in the US, including the EWGA (Executive Women's Golf Association), which exists to connect women to learn, play and enjoy golf for business and for fun, in addition to two other women-only networks whose details are listed in Appendix 1.

The US Travel Trade

With the rise of online tee time booking, an increasing number of Americans are willing to travel independently. However Golf tour operators remain important for Scottish golf tourism, although as far as women are concerned they are still more likely to travel as non-playing partners with their spouses.

A Canadian women golf specialist (Golf Chic – www.golfchic.com) now also offers women only trips, mainly to US and Canadian destinations. A large proportion of their business also comes from the US.

The Remarkable Travel Group in Michigan has a division offering 'led' women only golf tours, often incorporating an element of competition. There are options for women-only and couples. Scotland was featured in 2012 but does not seem to have been repeated, unlike Ireland which now seems to be on its fourth visit.

The 'Golf Tourism' book quotes Bill Hogan of the US based operator 'Wide World of Golf' as seeing a rise in both single sex and couples tours in 2011, with golf offers combining with spas, theatre-going and shopping. Accommodation and ancillary activities were said to be more important to groups including women. However this operator, who claims to have been the originator of the golf cruises phenomenon (with their appeal to couples), now appears to have amalgamated with Premier Golf LLC and Travel Incorporated in 2010 and their website no longer specifically mentions women's and couples golf, although Scotland is featured as a destination.

The many well-developed US golf tour operators will undoubtedly continue to develop their offering to cater for couples and women golfers if and as they can see potential. They

receive information from IAGTO and the bespoke nature of their operations enables them to accommodate trends fairly easily. It will be interesting to monitor the success of Perry Golf's (featured below) new 'couples' programmes.

Tour Operator Profile: Perrygolf – www.perrygolf.com



One of the largest golf tour operators serving the US with golf holidays to Scotland and elsewhere, Perry Golf have recently increased their offering for couples golf travel <http://www.perrygolf.com/destinations/couples.shtml> The company now states on its website:

“PerryGolf serves primarily two target audiences among international golf travellers: groups of men and groups of couples. Groups of men, or “buddy trips”, typically prefer to play Scotland and Ireland for 6-8 days in groups of 4-12. Australia’s Sandbelt golf region near Melbourne is another popular destination for the men. Couples enjoy the British Isles as well of course, but their non-golf travel interests lead them around the world. Our Mediterranean destinations plus South Africa, New Zealand and Australia are booked almost exclusively by couples, as are our golf cruises. Couples itineraries typically combine golf with local activities ranging from safaris and sightseeing to wine tastings and cooking classes. In either case, couples or men, our clientele ranges in age from 45 – 70+. Geographically, they are found throughout the United States. Nearly all of our clients are members of higher end private golf and country clubs.”

Whilst more ‘traditional’ golf itineraries are included, the Couples tours also include Golf Cruises (including an imaginative one with Exclusive Use and based around the Great Glen Caledonian Canal). Epicurean Tours featured do also include seafood, Andrew Fairlie, Nick Nairn cookery lessons and Arbroath smokies alongside golf.

However options which are already sold out for 2014 seem to feature non-Scottish cruises e.g. the yacht Le Ponant in the Caribbean and the Mediterranean. Couples destinations now also feature S Africa, Vietnam Thailand and Cambodia, combining culture and food with golf. It will be interesting to see how the Scottish offering performs and is developed and whether other operators in the US market also begin to put together such packages.
Member of IAGTO.

Possible Opportunities for Scotland from US Women Golfers:

- Increased offering for couples through other many golf tour operators
- Increase in led single sex ‘tours’ by specialist operators and executive women’s groups

5.4. Country Profiles: Asia

5.4.1. China

Golf statistics in general are difficult to obtain for China. The China Golf Industry report estimated that there were ⁷358,000 golfers in China in 2010, with a growth rate in the region of 7.5%. This ties in fairly well with KPMG estimates from 2010 of 300,000 golfers. However other estimates are considerably higher. In August 2013, “The amount of golfers in China is growing tremendously fast as you can imagine,” said Paul Stringer, the Executive Vice President of Nicklaus Design. “They think that there’s in the neighborhood of two million active golfers right now. They think that’s going to get up to 20 million before very long”⁸.

⁷ China Golf Industry Report (2011) <http://www.forwardgolf.com.cn/en/newsshow.asp?id=1109>

⁸ <http://onlyagame.wbur.org/2013/08/03/china-golf>

There is a lack of data on female participation in China. The 'Golf Tourist' book states that the game is heavily male-dominated, with only 13% of Chinese club members being female. Official data from the National Golf Foundation is described by one commentator as 'meticulously revised', which may or may not reflect on its accuracy. Observations of play at Mission Hills Shenzhen by Kingsbarns in March 2014 suggest that as many as 40-50% of active golfers there are women. The very expensive membership packages at Mission Hills (with fees from £35k to £200k) include a member's spouse and children up to age 21 at no extra cost. If that member is male and the child female, this will already distort gender figures based on 'members'.

As with Korea, Chinese women have been additionally motivated to play golf by the success of women professionals such as Yani Tseng, Shanshan Feng and Na Yeon Choi. However as is the case with men in China, golf is seen as a way for women to show they are one of the wealthy elite.

However in general, outbound golf tourists from China, especially women, have tended to remain in SE Asia, occasionally coming as far as UAE where Mandarin-speaking professionals have been employed at several clubs. Travelling as couples, women golf tourists are believed to be beginning to arrive in the US (e.g. the Carolinas) but uptake of top end golf tours to Scotland is believed to be fairly small to date.

With the inclusion of golf in the Olympics from 2016 it is expected that China will begin to 'hot house' large numbers of young players to provide a medal pipeline. However with few exceptions, the majority of these players are not expected to become potential tourists to Scotland in the foreseeable future.

Numbers of wealthy Chinese golf visitors to Scotland in general are likely to grow due to the sheer potential size of the market, providing both clubs and operators are willing to invest time and money in building relationships with clubs and the outbound travel trade and if difficulties e.g. in terms of Chinese lack of forward planning and payment, can be overcome. These are described in more detail in the China country profile. It will be interesting to see the results of an inbound familiarisation trip from Mission Hills which is expected to arrive shortly at Kingsbarns, following their attendance at the AGTC in March 2014.

As stated earlier, although it is not yet clear what proportion of group tours from China are likely to be mixed gender, it seems likely that at the highest end, women who are members and affiliate of clubs such as Mission Hills will wish to participate in any 'trophy trip' to St Andrews. The average duration of inbound trips from China which are devoted to golf are expected to be shorter than those from the US, unlikely to average 5 rounds of golf, and to be focused in and around St Andrews. It is also expected that organised luxury trips for Chinese visitors which include golf alongside other top-end experiences (including luxury shopping) are increasingly likely to be mixed gender groups, following the pattern of visitors from other long haul countries of origin are likely to be mixed groups. This does not automatically mean that all of the women will actually be playing golf, either at all or as much as the male group members, but reflects Chinese women's influence in both earnings and major expenditure.

It must be borne in mind that China is also positioning itself strongly as an international golf tourism destination, with even exclusive clubs like Mission Hills actively seeking international visitors.

Despite the potential offered by China, it is clear that this will be a difficult market for the following reasons:

- The Chinese do not appear to understand (or want to understand!) Scottish tee time booking processes in general. Initial feedback suggests some especially have a problem when told by tour operators about rules and restrictions that say they must stay for 3 days to get a guaranteed Old Course tee time; some visitors have said they want to be able to 'do' St Andrews as a one-day side trip from London.
- There appears to be a cultural resistance to pre-planning and making advance bookings and payment of deposits which will make playing on trophy courses more difficult, especially for any larger groups in peak periods
- There is uncertainty around Visa applications (which also deters from advance planning)
- There is a certain disregard for 'rules' which can upset other golfers (although Kingsbarns have translated the course etiquette into Chinese). One smaller inbound operator from China had experienced a lack of interest from some membership courses in receiving Chinese groups due to (perceived or actual?) speed of play issues.
- Some tour operators seeking Chinese business have been forced to 'risk' pre-buying bookings on their own account so that they can be sure of capacity – but are likely to put up prices as a result as compensation for this risk, which may deter some golfers

Possible opportunities for Scotland from Chinese women golfers:

- It is anticipated that most Chinese women coming to Scotland to play golf will be part of a mixed group
- Top end luxury tours for couples, with options for some group members non-playing, combining golf experiences on trophy courses with malt whisky and designer shopping opportunities are believed to have appeal in China to a small top-end niche
- Group trips from Chinese Clubs: Kingsbarns have recently visited Mission Hills and have invited a group of their members on a fam trip, arranged through a Chinese tour operator. If this is successful, they hope to welcome a number of these group trips of Mission Hills members throughout the year, playing at Kingsbarns, Carnoustie and Gleneagles, possibly as well as St Andrews. It will be important for the development this initiative to be supported as required to maximise the chances of success. A similar model may be able to be replicated elsewhere.
- Despite this initial interest, Kingsbarns feels that the Chinese market is unlikely to be of major importance for many years and will be difficult (due to the reasons mentioned above) and slow to develop in the short to medium term.

5.4.2. Republic of Korea (South Korea):

The number of female golfers in South Korea has been increasing rapidly in the past 10 years. According to the statistics of 2005, female golfers in Korea only represented around 11% of all golfers, yet today that has increased to over 35% according to official statistics. This rise is believed to have been driven by the success of professional Korean women golfers in the LPGA Tour.

The rise of Korean professional female golfers rather than male golfers has been attributed to the 2 year military service that all Korean males have to undergo at a time when they would have to be practising golf non-stop to be at top of their game. Parents are therefore more likely to invest time and money in nurturing their daughters as professional golfers. Korean parents have no qualms about 'hot housing' their daughters and relentless repetitive practice is believed to be fundamental to success. This approach is unlikely to be practised with such vigour (or accepted by the children) in western cultures, but enables Korean pros to succeed. Korean men are also enthusiastic supporters of the women's game, many

believing that they have more in common with them as far as their own game is concerned than with the men's professional game.

Whereas 10 years ago many Koreans had to travel overseas to play golf as there was a lack of available courses, the supply of courses has now increased to the extent that many are now suffering financially since the rapid boom in course only narrowly preceded the economic crisis.

Despite the easing of the supply side, outbound golf tourism is very popular in Korea and believed to be increasing. Many Korean women do go for golf vacations either with their friends or spouses. However the most popular destinations are said to be in South East Asia and include Malaysia, the Philippines, Thailand. It is thought to be highly unlikely that Korean women would venture in single sex groups on a long haul trip as far as Scotland, to play golf although a small number of wealthier Koreans may travel as couples to Scotland as a 'trip of a lifetime'.

For a top end trip to Scotland, most Koreans will use a golf tour operator, although only a small number in Korea do feature Scotland. One Korean operator, Tour di Medici (www.tourmedici.com) specialise in luxury VIP tours such including gourmet tours to Spain and luxurious glamping tours to Kenya alongside golf tours to Scotland. These are only believed to appeal to a very small niche.

Korea is generally a very small market for Scotland. According to Visit Britain's 2013 market snapshot, less than 3000 of the Korean visitors to the UK came to Scotland in 2012, with holidays being the main purpose of visit. This figure has already been exceeded by Scotland's visitors from China (28,000+ in 2012)

Possible Opportunities for Scotland from Korean Women Golfers:

- Development of couples tours (through tour operators) to coincide with Ricoh WBO in 2015 or 2017, possibly combined with some play at Carnoustie and/or St Andrews, scene of previous RWBOs
- Development of a wider 'play the Ricoh WBO tour' using all Ricoh Open courses, past and future (and including a mini-tournament?)
- Working with outbound golf operators but also general outbound operators in Korea to develop packages at both luxury and medium price brackets, combining golf with other experiences

5.4.3. Japan

Golf is still undoubtedly very popular in Japan, with 9.24m players recorded in the Japanese official statistics in 2012, based on a major 2011 sports survey. During the time of the huge rise in the popularity in golf in Japan in the 70s and 80s, golf was played largely by 'salarymen' on expense accounts, a number of whom did travel to Scotland on high-end packages to play trophy courses, especially St Andrews. With the collapse of the Japanese economy collapsed in the mid-1990s, Golf participation also went into decline. This decline has to some extent been halted and reversed, given that Japan still has over 9.24m golfers (including driving range golfers). Golf has been rehabilitated as a sport rather than a day of work outside of the office. With this change has come a rise in women golfers, to 18% in 2011 (representing 1.6m women golfers) and believed to be now 20% and still rising, spurred to some extent by successes e.g. Miyazato Ai, although less than in Korea.

Women golfers in Japan are marginally more likely to be married (58%) and aged 40+ with a peak 55-60. However there have been recent increases in participation by young unmarried women in their 20s and 30s with time and disposable income. This activity has been focussed around indoor lessons or fuelled by a rise in golfing 'group dates' with men on

selected courses. Whilst this phenomenon has hugely benefited the golf fashion and equipment industries, it has had less effect on long distance golf travel. Where these younger women are travelling as golf tourists, they are mainly doing so within Japan or choosing Asian-Pacific destinations such as Thailand, Guam and Hawaii.

Feedback from courses and operators suggests that outbound golf tourism to Scotland has never returned to 80s levels. This is also corroborated by the Japanese Golf tour operators who suggest that travel overseas from Japan is much lower than might be expected, with domestic travel more likely given Japan's 2,400 courses.

A golfing trip to Scotland (and St Andrews) is seen as a 'dream of a lifetime' and one which not many will realise. Married couples in their 50s and over are most likely to travel for golf and those wishing to visit Scotland are catered for by 4-5 top end tour operators, mainly offering St Andrews. There do not appear to be any women golf travel specialists.

Possible Opportunities for Scotland from Japanese Women Golfers:

- **Luxury 'Couples' golf tours:** One commentator felt that there was room for golf tour operators to present more imaginative top-end packages and bespoke 'suggestions' for Japanese couples, tying together golf with shopping for cashmere and other designer textiles, fine seafood dining and malt whisky-related visits and tastings, even though the appeal of such a product would be limited to a very small niche. This person was unaware that there are some existing Scottish based operators catering for this end of the market (e.g. see Platinum Golf Travel profiled below), already offering top end experiences, who could work with Japanese based and other Asian golf tour operators on such products, if they had the opportunity to develop these relationships and raise awareness of what they can offer.

Tour Operator Profile: Platinum Golf Scotland www.platinumgolfscotland.com



Platinum Golf Scotland offers high end and luxury bespoke golf packages throughout Scotland, mainly using 5 star accommodation and exclusive use, although it works with some 4 star boutique properties. PGS also organises visits to playing events e.g. the Clan Tournament and the Carnoustie Classic as well as spectator events like the Open.

The company has a translated page of its website into Chinese, since a few years ago it was able to work with a personal business contact in China and as a result attracted a small number of Chinese golfing businessmen (corporate clients), with some accompanied by wives. With the retirement of that contact, PGS took part in an SCDI trade mission to China to try to find alternative trade relationships. This was partially successful but the company then did not have the resource at the time for full follow through.

The current customer base is now mainly from Germany, Canada, Austria, Switzerland and the Netherlands. This includes a number of corporate bookings. There are still a high number of male-only groups, but an increase in accompanying women has been noted, although so far the majority are non-golfers requiring a high quality range of experiences to match those of the golfers.

However PGS are aware that there has been an increase in visitors from China and would welcome any opportunity or support to now develop its Asian markets (Japan and Korea as well as China). PR and press fam trips would be particularly helpful as would introductions to relevant outbound golf tour operators in each main market. They are also aware that many of their products do appear to be very well suited to the top end of the Asian market (and this appears to be a view endorsed by input from consultees in Asian markets). Members of IAGTO

6. ROLE OF EVENTS:

In terms of women's golf, the Ricoh Women's British Open (RWBO) is felt to be the most influential. Scotland is well placed to raise its profile through the RICOH, with the event being held at a Scottish course in 2011 and 2013 and it is anticipated that Scotland will continue to host the 'odd numbered' years through to 2019.

According to Ricoh Women's British Open organisers, attendance at past events has been in the region of over 55,000, has had a 50:50 gender split, with average age of spectators being 45+. This compares with a 79:21 male to female split at the Ryder Cup in Wales in ⁹2010. This shows that interest in women's golf not only captures the female imagination (more than a male competition appears to) but that interest is also still significant amongst male golfers.

The economic impact of the Ricoh Open at St Andrews in 2013 was considerable, with net expenditure measured at £ 4.5m at Fife level and £ 5.2m at a Scottish level. Significantly for Golf Tourism, 20% of overseas spectators intended to return to Scotland when the event returns to Turnberry in 2015, as did 40% of spectators overall. However the economic impact research did not appear to take account of gender or capture country of origin, so it is difficult to draw detailed conclusions in terms of women's international golf tourism. It is unclear to what extent spectator packages were sold in markets with high levels of women golfers.

Significantly, the event is widely televised internationally and in 2015 coverage is expected to be particularly strong in Asia. Given the nationalities of many of the competitors, it is hoped that the impact on countries such as S. Korea and China is significant for raising Scotland's profile and seeding an aspiration to visit Scotland to play the same courses amongst the whole golf-interested population, across both genders, Korean male golfers identify with professional women golfers, being closer in terms of hitting distance than US or European male golfers.

For other countries such as the US and Europe, the Ricoh has been seen to position Scotland as more women-friendly golf destination in terms of levels of difficulty, with even Carnoustie feeling that its tough, difficult image had been softened as a result in the eyes of some (women and men) who might previously have avoided it.

Some consultees thought there probably had already been a small connected rise in interest on the back of the Ricoh, resulting in more women playing some of the trophy courses and in competing in the Carnoustie Classic (12% of women participants in 2014 from England, US, France and Denmark and 60% of all successful entries from outside) or the Northern Ladies Open. However both of these events are now heavily over-subscribed, selling out in a short space of time and Carnoustie apparently does not have the capacity to add a second event in the autumn. Instead of seeing this as a reason for keeping its appeal low profile, it could be interesting to ascertain to what extent this level of interest could also be generated for a similar event held at a slightly less well-known or busy course.

The exhibiting opportunity at major Ladies golf events could potentially offer an opportunity to promote Scottish golf specifically as a women and couple friendly golf destination, given the proportionally larger numbers of women who attend, both from the host country and overseas. For example, Red Tee events reported interest in awayday and trip organisation as a result of their exhibiting at the Ricoh in 2013. With the Solheim Cup coming to Germany for the first time in September 2015 (to St Leon-Rot near Stuttgart), given the participation

⁹ Ryder Cup Economic Impact Assessment, Wales 2010 <http://bit.ly/1tttlcB>

profile in Germany it may be useful for SDI and/or partners to consider the possibility of the 'Home of Golf' taking a stand in the exhibition area.

There is some anecdotal evidence from accommodation providers to suggest that overseas spectator bookings for the 2014 Ryder Cup at Gleneagles show a high number of couples and mixed groups. Whilst it is not known how many of the women concerned are golfers themselves, the influx to this event should also represent an additional opportunity for overseas golfers of both sexes to see Scotland's golf and accommodation facilities at first hand, which will hopefully encourage return visits as golf tourists.

7. PRODUCT DEVELOPMENT: IMPLICATIONS OF NEEDS OF WOMEN GOLF TOURISTS FOR THE SCOTTISH GOLF PRODUCT:

'Through experience we have learned that women frequently prefer golf trips that are more than 'just golf'. We frequently get requests to mix in ...Sightseeing, shopping, spas, fine dining, hiking....'

Betsy Aldrich, RTG Golf

As the country by country analysis above shows, it is difficult to generalise about what international lady golfers are looking for. However the following points were made overall by several commentators and research sources:

- Women place more emphasis on the standard of accommodation and service (comfort / safety / facilities) than traditional 'all male' golf groups
- Women and couples / mixed groups are more likely to be looking at undertaking other activities including shopping and sightseeing.
- Despite the above, some female single sex groups (e.g. from Scandinavia or the Netherlands) will only or mainly be interested in golf in a similar way to all-male groups,
- If there is a spa, treatments must still be available after golfers come off the course – spa resorts cannot assume women guests will be looking at spa as alternative to golf and some male golfers will also welcome steam room / massage treatments after a game
- It is particularly important to women that the golf club they are visiting is welcoming and they do not feel awkward or intimidated by unfamiliar rules
- Playing 'trophy' or championships courses, especially St Andrews, is more important to US and Asian golfers than to Europeans, female as well as male. The venues of the Ricoh Women's Open may be of particular interest to women golfers in Asia and the US, provided this product can be appropriately developed and 'presented' for sale to these markets.
- Golfers from Asia (China, Japan and Korea) are likely to also be interested in top end luxury shopping (golfing clothes but big brand cashmere and designer names, as well as whisky). Clubs need to bear this in mind when stocking pro shops (clubs such as Gullane were seen as now offering a much better selection for Ladies)
- It is not altogether clear how the 'product' can be adapted to some of the Chinese market's requirements. Trophy courses are always unlikely to be able to accept large groups at short notice and the Old Course Tee Times traditions are unlikely to be changed.
- German couples on independent self-drive holidays might well be tempted to play golf as an activity during their stay if they had a better (advance) knowledge and understanding of what 'product' was on offer (e.g. Hidden Gems) along their itinerary.

This could also work with French and Dutch couples and be linked to the various Golf Pass offers.

8. ROUTES TO MARKET: WOMEN GOLF TOURISTS

8.1. B2C: Direct to female golfers

As a relatively affluent niche group, women golfers can be fairly readily targeted e.g.:

- Online through both women's golf publications and non-gender specific golf publications and portals, in addition to social media including golf bloggers.
- Offline specialist golf media publications
- Golf travel writers
- Consumer golf shows and stands at golf tour events
- Via women's golf networking groups
- Spin offs from high media profile / golf event coverage e.g. Ricoh Women's Open
- Via accommodation providers (both pre-trip at decision-making time and after arrival, although the former is preferable in giving visitors the option to come prepared with clubs / shoes if preferred)
- Via ferry companies (for European visitors coming by car) and airlines

B2B: Role of the Travel Trade

As with male golfers, where there is a focus on obtaining tee times at trophy courses and/or a language problem and/or large numbers in a group, women golfers from abroad will often use an agent or tour operator to arrange their golf break.

Jane Taylor of Angus Council is able to directly trace groups of international golfers participating in Carnoustie Classic to marketing activities, with tour operators such as Tee Off Travel having brought a group of French business women to the event in 2014 along with a group of Danish Ladies who indicated 'there are plenty more where we came from!' and planning further activity, although here too women were in a minority.

9. STRATEGIC CONTEXT – ACTION PLAN:

The individual country profiles above contain suggested potential opportunities in each of the focus markets for women golf tourists in Scotland.

The Action Plan below then considers what practical initiatives can be taken by SE/SDI and key partners to enable and support the Scottish golf industry to capitalise on these new and untapped market opportunities.

It is important that the findings of this research can be fed fairly readily and easily into the Scottish Golf Tourism Development Strategy and that women's golf (whether being played as single sex and couple / mixed groups) is seen as an integral part of the overall development of Scottish golf tourism.

Where appropriate, the Action Plan below relates the recommended actions to the existing key objectives and Actions contained in the Driving Forward Together strategic document.

APPENDIX 1: RESEARCH SOURCES

A. SECONDARY RESEARCH SOURCES AND USEFUL LINKS:

Background reading:

Publication:

'Golf Tourism' 2nd Edition Simon Hudson and Louise Hudson. Goodfellow Publishers 2014

Online sources:

http://www.golfbusinessmonitor.com/golf_industry/2013/04/why-women-are-important-in-golf-tourism.html

<http://www.cybergolf.com/womensgolf>

http://www.linksmagazine.com/best_of_golf/top-10-golf-resorts-for-women

http://www.greencast.co.uk/media/609423/syngenta_growing_golf_in_the_uk_summary_report.pdf

<http://golf2020.com/media/30059/whatwomenwant.pdf>

<http://golfbenchmark.com/>

<http://www.golfbusinesscommunity.com/>

<http://www.golfbusinesscommunity.com/Industry-Intelligence>

http://thefuturescompany.com/wp-content/uploads/2012/09/The_Future_of_Golf.pdf

<http://www.golfbusinessnews.com/>

<http://www.telegraph.co.uk/women/womens-life/10015487/The-apartheid-of-men-and-women-in-golf-clubs-really-tees-me-off.html>

DGV http://www.golf.de/dqv/binarydata/04_DGV-Statistiken_2013.pdf

KPMG Golf research materials: these are still available to some extent and can be located by searching on Google e.g. see

<http://www.kpmg.com/CZ/cs/IssuesAndInsights/ArticlesPublications/Press-releases/Documents/KPMG-Golf-participation-in-Europe-2013.pdf> and

<http://www.oxfordeconomics.com/publication/open/222607>

Golf Tour Operators – Women + couples specialists:

Golf Chics <http://www.golfchics.com/index.cfm> Canada based but seem to have US clientele and mainly US offering

Red Tee Breaks www.redteebreaks.com

Remarkable Travel Group www.rtggolf.com and

http://www.remarkabletravelgroup.com/mga_women Trips for women-only and couples

Birdie Trophy <http://www.birdietrophy.com/2.html> The 'Birdie Trophy' is a series of Exclusive women's golf trips led by Sybille Beckenbauer, (ex-wife of football's Franz Beckenbauer) and working through German tour operator Exclusiv Reisen <http://bit.ly/1kbc0d8> and Golf Extra <http://www.golf-extra.com/golfreisen.html> To date their all-women trips have mainly featured sunny destination such as Morocco, Turkey etc although also within Germany.

Femmes en Voyage <http://www.femmesenvoyage.com/aboutus.html> Indian specialist from Bangalore. Offer Golf tours for women as part of range of specialist tours, based around tournaments with accommodation mainly as part of resort. However destinations for golf appear to focus on India and Thailand. Cater for both local market and expat women.

Ladies Golf Media and Portal sites

www.womenandgolf.com (bi-monthly, UK) Travel Section mainly features sunny golf destinations (although there is one feature on the Renaissance Club at Archerfield, not particularly from female perspective)

<http://www.golfdigest.com/golf-digest-woman>

<http://www.womensgolf.org/>

http://www.womensgolf.org/community/wog_pinterest.html

<http://www.gottagogolf.com/blog/>

<http://www.nationalclubgolfer.com/features/articles/the-ladies-game>

Germany (with readership also in Austria, Switzerland etc)

<http://golfwomen.de/>

<http://www.golf.de/turnierspecials/dgv/iam-damen-2014/> but also the main Golf.de site

<http://www.evidero.de/bewegen/damen-golf>

<http://golfwomen.de/golfsport/eine-frauenquote-fuer-den-golfsport/>

France –

<http://www.swing-feminin.com/>

<http://www.golfdigest-fr.com/gdf/magazinegdf.htm>

<http://lesgolfeuses.wordpress.com/>

Women's Golf & Business Networking Clubs and Groups

Networking clubs in Europe:

<http://www.zakengolfster.nl/>

<http://www.leclub4267.com>

US Ladies Golf Networking Groups:

<http://www.ll4g.com/>

<http://www.womenoncourse.com/>

<http://www.ewga.com/>

Other media with good coverage for Ladies Golf:

<http://www.golfandcountry.ch/>

<http://www.flyingbluegolf.fr/>

Sites linked to major Ladies Golf Events:

<http://www.ladieseuropeantour.com/tournaments.php>

<http://www.sc-2015.com/en/home/>

<http://www.lpga.com/default.aspx>

Some country specific links:

USA NB for more info on US Ladies Golf initiatives: See Appendix 2

<http://www.forbes.com/sites/bridgetbrennan/2013/02/07/pga-looks-to-women-to-grow-golf/>

<http://online.wsj.com/news/articles/SB10001424052748704094104575143772046834464>

<http://www.prweb.com/releases/2010/08/prweb4346404.htm>

<http://www.hackgolf.org/hackathons/golf/orientation> This is a US crowdsourcing site aimed at gathering ideas for growing golf – including becoming more women friendly

<http://www.golfclubmanagement.net/2014/04/golf-sees-boom-female-participation-one-exception/>

<http://www.golfclubmanagement.net/2013/04/us-drive-to-attract-women-to-golf/>

<http://www.forbes.com/sites/bridgetbrennan/2013/02/07/pga-looks-to-women-to-grow-golf/>

<http://www.nancyberkley.com/>

<http://www.parexcellencemagazine.com/business-golf-for-women-golfers/the-fastest-growing-group-of-golfers-is-women-businesswomen.html>

http://golfbenchmark.com/article/women_s_rolling_out_the_green_carpet_certification_is_recommended

China

<http://www.forwardgolf.com.cn/en/newsshow.asp?id=1109>

<http://www.independent.co.uk/sport/chinese-government-turns-its-attention-to-illegal-golf-2289221.html>

http://www.visitbritain.org/Images/Foresight%20-%20issue%20120_tcm29-39146.pdf

www.cnki.com.cn Social characteristics of golfers, statistics, vacation sports statistics etc – however required registration to access + an ability to read simplified Chinese to get registered (although the research reports themselves seem to be published in English?)

China Golf Show <http://cgs.chinagolfshow.com/en/>

Examples of European courses with women/family offerings

<http://www.burggolf.nl/pro-am-series/>

<http://www.golf.de/golfguide/destinationen/60102346/ziele/hotelsaufdemgolplatz>

<http://www.souillacountryclub.nl/club/>

<http://www.birdietrophy.com/index.html> (with <http://www.golf-extra.com/>)

Netherlands

Dutch Tour operators featuring Scotland:

<http://thegolftraveller.nl> , www.fairwaygolftravel.nl , www.executivegolf.nl , www.pinhigh.nl , www.travel4reasons.nl , <http://www.golftime.nl>

Japan

<http://neojaponisme.com/2011/09/12/catalog-heritage-a-short-history-of-japanese-golf/>

<http://equiptforplay.com/2010/10/19/japanese-women-love-their-golf/>

<http://www.e-stat.go.jp/SG1/estat/ListE.do?bid=000001039113&cycode=0>

Scottish Golf Product related:

<http://www.golfnook.com/Links%20Lite.htm> Re 'Hidden Gems' for independent golfers

OTHER MISC STATISTICAL SOURCES REFERENCED IN REPORT:

Scotland population stats - <http://www.gro-scotland.gov.uk/files2/stats/population-estimates/mid2012/mid-2011-2012-pop-est.pdf>

http://www.rydercup.com/2010/europe/news/upload/IFMSMS_The-2010-Ryder-Cup_EIA-Report-Exec-Summary_Final-Version.pdf

International: Golf Clubs

International Golf Federation <http://www.internationalgolffederation.org/> (gives national federations)

<https://www.ega-golf.ch>

<http://www.golf.se/sgf/>

<http://www.golf.de/dgv/home.html>

<http://www.francegolf.fr/bienvenue.htm>

<http://www.golfeurope.com/>

APPENDIX 1(B): Primary Research: Consultees Approached

Golf travel-related / tour operators:

- Platinum Golf Scotland, Lynda Robinson, Sales Director, www.platinumgolfscotland.com
- Niblinks Japan + IAGTO Japan (Hikaru Yakushiji) <https://twitter.com/YakushijiH>
- The Golf Traveller (Ludovic Hoytema van Konijnenburg) www.thegolftraveller.nl
- AGS Golf, Adrian Stanley <http://www.agsgolfvacations.com/>
- Raphael Metayer, St Andrews Golf Experience www.standrewsgolfexperience.com
- IAGTO – Peter Walton www.iagto.com
- Red Tee Breaks Ltd (Sarah Forrest) www.redteebreaks.com
- Spela Golf (Roland Holm) – Swedish operator – UK based <http://spela-golf.com/>
- Tee Off Travel (Christophe Luneau) and Club 42.67, France www.teetravel.com and <http://www.leclub4267.com/>
- WSM, Weizhong Hu and Harold Chow

Overseas Golf courses / clubs / Pros in other countries (identified during the secondary research phase) with existing offerings aimed at women / mixed golfers and /or where women's golf participation rates are higher than in the UK:

- www.Kingggolf.de , Germany (John Eid)
- Gordon Johnstone, Ansbach

Scottish Golf Clubs:

- Carnoustie Links (Colin Macleod) + Pat Sawyers re Northern Ladies Open
- Dunbar Golf Club
- Kingsbarns Golf Club (Audrey Hogg)
- Longniddry Golf Club (Bob Gunning)
- St Andrews Links Trust
- **Key organisations** active in promoting Scottish golf and golf tourism
 - SGU – Andy Salmon
 - Scottish Golf Intelligence (formerly Scottish Golf Monitor) – Kevin Fish
 - GTS (Chair: Stewart Walker)
 - Golf East Lothian (Chair: Bob Gunning)
 - Golf Perthshire (Allan Minto)
- **Other:**
 - Jane Taylor, Golf Development, Angus Council
 - Peggy Norton, World Golf Foundation
 - Alison Root (Editor, Women & Golf Magazine)
 - Keith Mitchell, Sales Director, GolfBreaks.com
 - Scottish Development International overseas staff in Japan (Miwa), Korea (Howard Jang), China (Long Baijin and Mingyu Ge), and Germany (Katharina Kraehann)
 - UKT&I, British Embassy, Seoul, Korea – John Murphy and Yunjin Lee
 - DGV, (Jörg Schlockermann, Kommunikation und Marketing)

APPENDIX 2: USA INITIATIVES – ENCOURAGING WOMEN’S GOLF

‘The Right Invitation: 2011 Women’s Golf Longitudinal Research’

<http://www.golfwithwomen.com/wp-content/uploads/2012/02/2011-Women-Golfers-Longitudinal-Study.pdf>

Main findings:

According to this survey, best practices yielding in dramatically enhanced loyalty to a golf facility from women players, include:

- Four or more sets of tees, with the forward most set of tees ideally under 4,500 yards (though up to 4,800 yards considered), all to allow golfers to reach greens in regulation
- A golf shop in size of at least 500 square feet with a solid selection of well-displayed women’s clothing and equipment and a dedicated women’s department
- Both men and women staff employed in the golf shop
- Abundant directional signage on the golf course
- Greeters present at the facility entry/starting area
- Ample drinking water available at a minimum of three tees per nine holes
- Both men and women staff available for golf instruction
- The availability of childcare

‘Connecting with Her Playbook’ by PGA of America

http://sportsandleisuresearch.com/files/connecting_with_her_playbook.pdf

‘Connecting With Her’ is part of the US golf development strategy and focuses on women golfers. It is a US industry-wide initiative that is built on four strategic pillars: Education and Training, Marketing and Communications, Programming and Events, and Alliance Relationships

Key actions recommended to be taken by golf facilities included:

- Setting specific goals with regard to women golfers
- Understanding / changing culture through
 - Staff training and education
 - Communication and connection with the customer
 - Creating a welcoming environment
- Marketing:
 - consider materials and messages through eyes of the women golfers
 - Social media
 - Leveraging relationships
- Facility Audit – on and off the course
- NWGA Certification (‘Rolling out the green carpet’)

Note:

Golf 2.0. is a targeted, focused, long-range strategic plan for the golf industry to substantially increase the number of golfers, the rounds of golf played and the revenue generated from golf over the next decade among current and potential consumers of the game. The goal of Golf 2.0 is to increase the number of golfers from the current level of approximately 26 million to 40 million by the year 2020 while growing the relevance of golf in America. Golf 2.0 will build toward that goal on three core strategies: Retain and strengthen the Golfing Core, Engage the Lapsed and Drive new Players.

These strategies are comprised of 12 distinct strategic initiatives for driving growth, each of which provides golf facilities with a blueprint for deepening their engagement with current customers, connecting with potential women customers, targeting kids and minorities, and more. See http://mapqa.com/golf2/#Golf_2.0?

