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VisitScotland / Scottish Enterprise
Scotland Golf Visitor Survey 2016
Executive Summary



Introduction and Method

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

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

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

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

Profile of Golf Visitors

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

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

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

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

Visitor Journey

Planning and Booking

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

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

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

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

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

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

Trip Characteristics

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

The number of rounds of golf played reflects the length of trip data. The average number of rounds played by overnight visitors was 5.16. Overnight visitors from Scotland (whose trips are shorter) play

the lowest number of rounds (2.59). Overseas visitors played an average of 7.10 rounds, with visitors from North America playing more rounds (7.80) than those from Europe (4.94).

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

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

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

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

Visitor Experience

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

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

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

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

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

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

Spend and Economic Value

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

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

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

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

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

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

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