

National Tourism Golf Monitor Visitor Survey Summary Report

2006



Introduction

- » Consumer interviews with golf visitors were conducted at 80 courses throughout Scotland during 2006 (actual courses shown on page 4). The main objectives for the survey were:-

- » To understand more fully the characteristics of visiting golfers in Scotland including:-
 - » profile information
 - » booking patterns
 - » length of stay
 - » type of accommodation used
 - » expenditure levels

- » Information was also gathered on:-
 - » visitor origin
 - » frequency of golf holidays
 - » frequency of play
 - » playing ability

- » This report details the main findings from the 2006 survey (please note that these findings are representative of golfing visitors to the 80 courses. At this stage, this data has not been weighted to be representative of all courses in Scotland).



Methodology

- » Sports Marketing Surveys interviewers contacted a list of pre-selected courses to arrange a time to visit that was both convenient to the course and the interviewer. They also took into account arranging a time when a good selection of visitors was booked to be at the club.
 - » Interviews took place during both weekdays & weekends to ensure the profile of visitors was representative of the different type of golfer.

- » Interviews were then conducted with players either before they played or after they had completed their round of golf, so as not to interrupt their round or inconvenience them any more than necessary.

- » In total 1,657 interviews were completed during the programme, and have been analysed on an overall basis:
 1. Early Season: 500
 2. Main Season: 733
 3. Late Season: 414



2006 – Consumer Interviews

Interviews were conducted at 80 Courses.

CENTRAL	HEARTLANDS	HIGHLANDS & ISLANDS	NORTH EAST	SOUTH EAST	SOUTH WEST
Buchanan Castle Caldwell Callander Gleddoch Glenbervie Hags Castle Westerwood	Blairstown Carnoustie, Buddon Carnoustie, Championship Crail, Balcomie Crail, Craighead Downfield Drumroig Forfar Gleneagles - Kings Gleneagles - PGA Centenary Gleneagles - Queens Glenrothes Kingsbarns Kinross, Bruce Kinross, Montgomery Montrose, Mercantile Scotsraig St Andrews Bay, Devlin St Andrews Bay, Torrance St Andrews Links, Eden St Andrews Links, Jubilee St Andrews Links, Old St Andrews Links, New St Andrews Links, Strathryum St Andrews Dukes	Boat of Garten Brora Forres Fortrose Golspie Nairn Nairn, Dunbar Newtonmore Royal Dornoch Tain	Alford Ballater Banchory Braemar Cruden Bay Duff House Royal Inchmarlo Insch Inverurie Kemnay Moray, Old Newmacher Royal Aberdeen Stonehaven	Braid Hills No. 1 Cardrona Cragielaw Dalmahoy Gullane 1 Gullane 2 Haddington Longniddry Luffness Musselburgh North Berwick The Glen Whitekirk	Belleisle (SAC) Brighthouse Bay Castle Douglas Gatehouse-of-Fleet Girvan Glasgow Gailes Irvine, Bogside Royal Troon, Portland Turnberry, Ailsa Turnberry, Kintyre Western Gailes



Executive Summary

Demographic Profile

- » The Scottish golf visitor is male, an avid golfer, who has played for many years and is a regular golf holiday taker with 37% of the visitors taking 2 or more breaks a year.
- » Some seasonal patterns have emerged:
 - » Early season golfers – more likely to be male, travelling in groups and visiting Scotland primarily to play golf.
 - » Main season golfers – more likely to be on a family holiday, be guests of a member, and are frequent golfers (66% playing once a week or more)
 - » Late season golfers – higher incidence of females (21%), day visitors and golfers on a break where golf is not the main purpose. Takers of regular golf breaks.
- » Domestic holidays dominate with 87% of visitors from within the UK and 71% from Scotland alone.



Executive Summary

The Golfing Break

- » The average length of golf break for overnight visitors was 6.61 days, with the main season average higher than those of the early and late season – this is consistent with the fact that many main season visitors will have been taking their main summer holiday in Scotland.
- » The importance of societies to the golf tourism market is evident as golfers are playing on average in groups of over 7 golfers.
- » Golfers travelled with on average 1.2 non-golfers – the figure is higher for visiting UK golfers who may well bring friends/family with them to Scotland.
- » 51% of golfers book directly with the course at which they are playing – the telephone is used by 67% of golfers for this.
- » 69% of golfers are booking their round one month or more in advance and are booking their actual golf break over 6 months in advance on average.
- » The quality of accommodation selected by visiting golfers is varied, with golfers from further afield enjoying better levels of accommodation.
- » 66% of golfers did not visit the website of the course at which they are playing prior to their round of golf



Executive Summary

Course & Rounds

- » 93% of overnight golfing visitors to Scotland are only coming to Scotland for their holiday - there is little leakage to Eire or England.
- » Overnight visitors average 3.9 rounds of golf played per break, this rises to over 5 for those coming from overseas.
- » Each golfer played on average just under 6 rounds of golf on their break. Only domestic Scottish visitors played more than one round of golf per day – this is consistent with the fact that these golfers are primarily on long-weekend golf specific breaks.
- » There is excellent opportunities for repeat business - 53% of visitors had previously played the course at which they were interviewed.
- » Once golfers have played a course, they will often play it again with 30% of respondents returning to the course within a year of their previous visit.
- » Satisfaction with the golfing experience is superb with 43% rating it very good with this rising to 72% from overseas, and 55% from the rest of the UK – both key markets.
- » The basis of the decision on golfing in Scotland is the reputation & heritage of Scotland as a golf destination (61%) and previous experience (38%).



Executive Summary

Expenditure

- » Average expenditure levels for golf breaks are outlined below:
 - » Day visitors - £74
 - » Overnight visitors (including travel to Scotland) - £1,124 (£170/day)
 - » Domestic (Scots) overnight visitors - £449 (£109/day)
 - » Non-domestic overnight visitors (excluding travel to Scotland) - £865 (£131/day)
- » Many respondents were not able to provide full details of their expenditure but where identifiable, the average expenditure on green fees - including domestic Scottish visitors - was £73 per break.
 - » The average expenditure on green fees rises to £182 for golfers staying overnight in Scotland.
- » Expenditure on food and drink is also influenced by package pricing - however, overseas visitors are spending as much as £43 per day whereas their UK counterparts are spending just £20.
- » Visitors spent an average of £41 per day on accommodation – the level is at its highest for those golfers visiting in the early season.
- » Those who moved around Scotland spent most on their breaks - but this is consistent with the overseas visitors who stayed the longest and played the most golf.
- » Golfers who took more golf breaks were found to also spend the highest amount on each break.



Executive Summary

Future Golfing Breaks

- » The Scotland golf break exceeds the expectation of the visitor - with 56% overall having their trip exceeding their expectations, and this rising to 66% from overseas.
- » Repeat business has strong potential with 90% indicating an intention to return to Scotland, and 54% stating they definitely will.
- » Friends (62%) and magazines (71%) remain the main information sources for researching golf holidays and golf breaks.
- » Repeat business is strong, and active marketing to current visitors, and establishing a relationship with them is key for Scotland to maintain current visitor patterns and attract new golfers through word-of-mouth and personal recommendation.

Seasonal Patterns

- » There appears to be distinct seasonal patterns with the early season attracting the more avid golfer who spends the most, the main season consisting largely of family holidays or domestic day breaks, and the late season including more females, requiring better accommodation but staying for less (32% - 2/3 nights only).
- » There is also an ability to target overseas golfers in Europe and the USA with particular group promotions (70% of European golfers and 65% if American golfers travelled in groups/societies). It is also possible to target these groups through tour operators (in the USA) or via internet information (in Europe).



Profile of Golf Visitors

Sports Marketing Surveys

quality research for management action

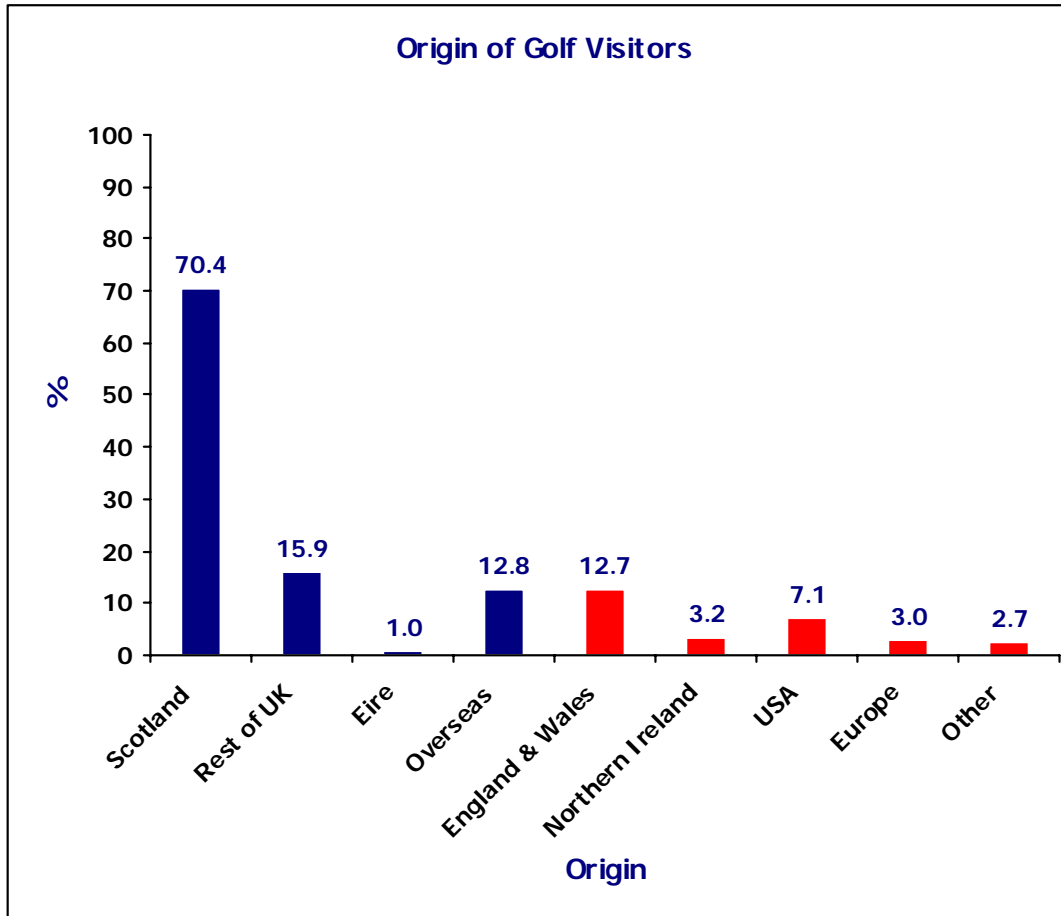
Demographics	Overall 2006	Early Season	Main Season	Late Season	Scotland	Rest of UK	Eire	Overseas	England & Wales	Northern Ireland	USA	Europe	Other
Base:	1657	500	731	426	1166	263	16	212	210	53	118	50	44
Sex:													
Male	82	87	81	79	83	80	63	84	80	81	89	78	75
Female	18	13	19	21	17	20	38	17	20	19	11	22	25
Total %	100	100	100	100	100	100	100	100	100	100	100	100	100
Age :													
<18yrs	1	-	1	1	1	0	0	1	0	0	2	0	0
18-24	3	3	3	4	4	1	0	3	2	0	0	12	0
25-34	11	11	11	11	12	10	6	5	10	11	3	10	5
35-44	23	20	26	23	23	24	31	20	27	11	17	24	23
45-54	28	25	28	30	25	37	25	32	32	56	34	32	27
55-64	23	27	20	21	22	23	31	29	23	22	32	16	34
65+	12	15	11	11	14	5	6	10	7	0	11	6	11
Total %	100	100	100	100	100	100	100	100	100	100	100	100	100
Handicap:													
0-4	3	5	3	2	3	3	0	4	3	5	5	3	5
5-9	3	4	3	2	3	3	0	5	3	5	5	5	4
10-18	11	10	12	10	11	7	13	12	7	5	17	8	5
19-36	51	49	56	43	45	58	56	58	57	63	58	42	77
No handicap	32	32	27	43	39	29	31	21	31	22	15	42	11
Total %	100	100	100	100	100	101	100	100	100	100	100	100	100
Playing Golf:													
0-2 years	6	3	3	7	6	5	6	5	6	0	0	14	9
2 years +	94	97	97	93	94	95	94	95	94	100	100	86	91
Total %	100	100	100	100	100	100	100	100	100	100	100	100	100
Play Frequency													
More than once per week	64	61	66	62	65	66	50	52	65	72	59	34	55
1-4 time per month	32	36	29	34	30	30	50	42	31	28	37	58	39
less than 1 per month	4	3	5	5	5	3	0	5	4	0	3	8	7
Total %	100	100	100	100	100	100	100	100	100	100	100	100	100

- » Scottish golf visitor = male, an avid golfer, who has played for many years and is a regular golf holiday taker.
 - » Early season – more likely to be male, travelling groups and visiting Scotland primarily to play golf.
 - » Main season – more likely to be on a family holiday, guests of a member, and are frequent golfers.
 - » Late season golfers – higher incidence of females, day visitors and golfers on a break where golf is not the main purpose. Takers of regular golf breaks.

NB The overseas column is made up from visitors from USA, Europe & Other. The rest of UK column is made up of England, Wales & Northern Ireland. Specific breakdowns of the actual nationalities are provided here for information but summarised in the rest of this report. * Please note the small sample size for visitors from EIRE – these results should be used with caution. In future years, EIRE will be incorporated into overseas results.



Origin of Golf Visitors



- » Domestic holidays dominate at these courses with 86% of visitors from within the UK and 70% from Scotland alone. For the 2007 survey, quotas will be set for both overnight visitors and visitors from different nationalities.

Length of Visit (overnight visitors)

Length of Visit	Overall 2006	Scotland	Rest of UK	Eire	Overseas
Base	578	137	222	15	204
Mean	6.61	4.12	6.53	6.60	8.36
1 night	0	0	0	0	0
2 - 3 nights	23	53	26	7	2
4 -6 nights	21	25	20	33	21
1 week	24	12	20	40	36
Up to 2 weeks	29	10	30	20	37
Longer than 2 weeks	4	0	4	0	3
Total %	100	100	100	100	100

- » 88% of domestic Scottish visitors were on a day trip to the golf course.
- » Average length of golf break for overnight visitors was 6.61 days.
 - » The main season average higher than those of the early and late season.
- » Average number of golfers in a party = 7.65
Average number of non-golfers in a party = 1.20

* Please note the small sample size for visitors from EIRE – these results should be used with caution



How golf round was booked?

Booking Method	Overall 2006	Scotland	Rest of UK	Eire	Overseas
Base:	1654	1164	263	16	211
Direct with golf course	51	53	58	13	32
Through Member	27	36	10	6	6
Through a specialist operator	11	1	15	56	58
Just turned up	7	8	8	6	1
By my own club pro	4	3	10	19	2
Total %	100	100	100	100	100

- » 51% of golfers book directly with the course at which they are playing.
 - » Of these, 67% used the telephone to book their round of golf.
- » Tour Operators remain of significance for overseas visitors.
- » However, even 32% of those from overseas booked directly with the golf course.

* Please note the small sample size for visitors from EIRE – these results should be used with caution



When was the golf break booked?

Length of pre booking visit	Overall 2006	Scotland	Rest of UK	Eire	Overseas
Base:	591	144	227	15	205
Average: Months	6.6	5.3	6.93	7.20	7.03
Less than 1 month	4	9	2	0	1
1 - 3 months	17	29	13	7	12
3 - 6 months	37	30	41	33	38
6 months - 1 year	36	29	35	60	41
More than 1 year	6	3	8	0	6
Don't know	1	0	0	0	2
Total %	100	100	100	100	100

- » Golf break takers have pre-booked their holiday on average just over 6 and half months in advance.
- » Those from outside the UK – and also the majority of non-domestic UK visitors – are booking 7 months or more in advance.
- » With golfers booking their trips and golf well in advance, this allows for pre-planning and scheduling for all players in the golf tourism market.

* Please note the small sample size for visitors from EIRE – these results should be used with caution



Type of accommodation

Accommodation type	Overall 2006	Scotland	Rest of UK	Eire	Overseas
Base:	591	144	227	15	205
Bed & Breakfast/Guest house	26	29	26	13	24
Golf Resort	18	6	17	60	26
4* hotel	16	15	12	20	21
3* hotel	14	16	18	7	13
Camping / Caravaning	8	8	14	0	1
Rented / self catering	6	8	6	0	4
Staying with family / friends	8	8	8	13	6
5* hotel	7	1	1	13	17
Hotel don't know rating	4	6	1	0	6
2* hotel	4	6	5	0	0
Second home in Scotland	1	0	1	0	1
Other	0	0	1	0	0

- » Golfers choose a wide and varied range of accommodation when on a golf break.
- » 60% of golfers on an overnight break are staying in one place in Scotland during their holiday.
 - » This is particularly true of domestic Scottish (82%) and other UK (66%) golfers.

* Please note the small sample size for visitors from EIRE – these results should be used with caution



Courses and Rounds Played (Overnight visitors)

Number of courses visited	Overall 2006	Scotland	Rest of UK	Eire	Overseas
Base	590	144	226	15	205
Mean	3.90	3.09	3.01	3.67	5.37
0 - 5	81	96	90	80	60
6 - 10	18	4	10	20	36
11 - 15	1	0	0	0	4
15+	0	1	0	0	1
Total %	100	100	100	100	100

Number of rounds played	Overall 2006	Scotland	Rest of UK	Eire	Overseas
Base	591	144	227	15	205
Mean	5.86	4.44	5.35	6.60	7.38
0 - 5	54	76	59	40	36
6 - 10	38	22	34	47	53
11 - 15	7	3	6	13	9
15+	1	0	0	0	2
Total %	100	100	100	100	100

- » On average overnight golfers are visiting just under 4 golf courses and playing just under 6 rounds of golf on their breaks.
- » 93% of golfers are only visiting courses in Scotland on their break.
- » 53% of golfers had previously played at the course where they were interviewed.

* Please note the small sample size for visitors from EIRE – these results should be used with caution



Total Expenditure – All visitors

Total Expenditure	Overall 2006	Scotland	Rest of UK	Eire	Overseas
Base:	1279	975	194	8	102
Average:	£401	£118	£663	£1,136	£2,556
£100 or under	58	75	8	0	0
£101 to £500	21	22	23	0	14
£501- £1000	11	3	49	37	39
£1001 - £1500	3	0	14	63	11
£1501 - £5000	7	0	6	0	39
Total %	100	100	100	100	100

- » This table shows total expenditure of all golfing visitors interviewed. This will include travel to Scotland, travel in Scotland, accommodation, food & drink, green fees and other expenses.
- » Please note that the next 2 tables in this report outline the expenditure for day visitors only, and overnight visitors only (both including and excluding travel to Scotland).

* Please note the small sample size for visitors from EIRE – these results should be used with caution



Total Expenditure – Day visitors only

Total Expenditure	Overall 2006	Scotland	Rest of UK
Base:	877	858	19
Expenditure	£74	£72	£92
%			
£100 or under	84	84	68
£101 - £500	16	16	32
£501-£1000	0	0	0
£1001-£1500	0	0	0
£1501-£5000	0	0	0
Total %	100	100	100

- » Nearly all day visitors originated from Scotland itself and therefore these golfers dominate the figures.
- » Day visitors in Scotland are spending on average £74.
- » The remaining day visitors are those who have crossed the border from England for their golf and will return home once their round is finished (please note that travel to Scotland will be included in these figures).



Total Expenditure – Overnight Visitors only including travel to Scotland

Total Expenditure	Overall 2006	Scotland	Rest of UK	Eire	Overseas
Base:	399	117	172	8	102
Average:	£1,124	£449	£747	£1,136	£2,556
Average per day	£170	£109	£114	£172	£306
£100 or under	2	5	2	0	0
£101 to £500	32	68	23	0	14
£501- £1000	34	24	53	37	39
£1001 - £1500	11	3	16	63	11
£1501 - £5000	21	0	6	0	39
Total %	100	100	100	100	100

- » This table shows total expenditure of all overnight golfing visitors interviewed. This will include travel to Scotland, travel in Scotland, accommodation, food & drink, green fees and other expenses. Obviously the figures for the Scots interviewed will not include any travel to Scotland. The table on the next page shows expenditure for other nationalities excluding the cost of travelling to Scotland.
- » The average per day is calculated by dividing the average expenditure by the average number of days on the golf trip (shown on page 12).
- » Please note that some respondents were not able/willing to answer this question.

* Please note the small sample size for visitors from EIRE – these results should be used with caution



Total Expenditure – Overnight Visitors excluding travel to Scotland

Total Expenditure	Overall 2006	Rest of UK	Eire	Overseas
Base:	206	152	5	49
Average:	£865	£670	£950	£1726
Average per day	£131	£103	£144	£207

- » This table shows total expenditure of all overnight golfing visitors to Scotland (excluding Scots). It excludes the cost of travelling to Scotland.
- » The average per day is calculated by dividing the average expenditure by the average number of days on the golf trip (page 12).
- » Please note that due to some respondents buying their golf trip as a package, not all were able to answer this question.

* Please note the small sample size for visitors from EIRE and overseas in this table– these results should be used with caution



Future Golf Breaks

Intend to Return	Overall 2006	Scotland	Rest of UK	Eire	Overseas
Base	589	144	227	15	203
Yes: Definitely	54	74	48	27	49
Yes: Would hope to do so in the future	36	19	40	60	42
No plans as yet	10	7	12	13	8
Definitely not	0	0	0	0	1
Total %	100	100	100	100	100

- » 90% of visitors either hope to or will definitely return to Scotland at some point in the future.
- » 99% of visitors said that their golf break had either met or exceeded expectations.

*Please note the small sample size for visitors from EIRE – these results should be used with caution