



German Golfers Questionnaire Results and Analysis Summary - October 2006

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**We at VisitScotland are keen to find out your opinions
about golf holidays and, if you have visited Scotland
before to play golf, we would like to hear all about
your experience**

1. Research Background and Methodology

In October 2006 a questionnaire was sent to 2,824 German Golfers who had responded to previous VisitScotland campaigns and were, therefore, a “warm” sample. The aim of the questionnaire was to gather information about their experience of golf in Scotland. The questionnaire identified where in Scotland they went on their golf holidays, what sort of requirements they had in-terms of accommodation, entertainment, transport etc. It also identified which destinations they went to instead of Scotland.

In total 300 responses have been received, of these 268 played golf which is a return of 9%:

- Of these respondents (71%) have played golf abroad.
- 86 (32%) have played in Scotland at some point.

This is a representative sample and should prove useful in drawing down some useful learning's.

2. Executive Summary

Respondent background

- 70% of respondents are members of a golf course and therefore are very knowledgeable about golf.
- 71% of respondents have played abroad, 32% have played in Scotland at some stage, with 13% having played already or booked to play golf in Scotland in 2006.
- 69% of respondents visiting Scotland to play golf were male; Indicating that 31% were women (a very health return).
- German golfers are required to gain the Platzreife to play golf in Germany. This is a golf licence that requires participants to undertake a written exam and complete a round of golf accompanied by a golf professional. 84% of respondents have got this licence.

German Golf

- There are over 506,000 licensed golfers in Germany making it one of the largest European golfing markets outside of the UK.
- The key golf regions in Germany are Bayern, Nordrhein-Westfalen, Baden-Wurttemberg, Niedersachsen/Bremen and Hessen providing 75% of all licensed golfers

Message, Media and Events

- The “Home of Golf “ message resonates strongly with the German respondents.
- The Deutsche Bank and the BMW International Open are the key events on the German golfing calendar.
- www.golf.de is the most popular online source of golfing information. Golf magazines are also popular with Golf Magazin (Golf Digest) and Golf Journal receiving a high readership amongst respondents.

Golf holidays in Scotland

- 82% of respondents go on at least 1 golfing holiday a year.
- Of those who have played golf abroad, 45% have been to Scotland to play golf at some point.
- 71% of respondents will fly with 49% of them landing into Edinburgh airport.
- The most popular form of accommodation was 3-4 star Hotels and B&B's.
- Respondents were not overly impressed by our golf course practice areas and restaurants.
- The months of May-August were the most popular times to visit.
- The most common duration of golf break was 4-7 days. With 8-14 days the second most popular.
- Typically golf was booked directly with the golf club.
- 92% of those who have visited so far this year said that their overall experience was good or very good.
- Given the choice to play anywhere in the world 44% of total respondents chose Scotland.