



# Scotland Golf Visitor Survey 2016

## Regional Report – Aberdeenshire

### Background and survey method

The data for the survey was collected by:

- Face-to-face interviews at courses across Scotland – 53 completed in Aberdeenshire
- Online survey sent to golf visitors – 135 golfing visitors to Aberdeenshire responded
- Total sample for Aberdeenshire – 179 respondents<sup>1</sup>

All interviewing was conducted between May and October 2016. The online survey was open from June to November 2016.

The data set reported has been weighted to ensure it is representative in terms of month, country of origin of visitors and region.

### Key Findings

#### *Economic Value of Golf Visitors*

- The economic value of golf tourism to Aberdeenshire is £15.3M (360 jobs supported)<sup>2</sup>.

#### *Profile of Golf Visitors*

- Visitors to Aberdeenshire's golf courses are more likely to be from overseas (60% of visitors) and less likely to be from Scotland (23% of visitors) compared to visitors to Scotland as a whole (31% overseas; 50% from Scotland). In total, 17% of golf visitors to Aberdeenshire were from the rest of the UK (outside of Scotland), which is similar to the proportion across Scotland (19%).
- Visitors to Aberdeenshire were more likely to be staying overnight (84%) than the average proportion of overnight visitors to Scotland as a whole (65%).
- The vast majority of golf visitors to Aberdeenshire (87%) are male, while only 13% are female.
- The age profile of golf visitors to Aberdeenshire is skewed to the older age groups: 53% are aged over 55 years. This profile is similar to the Scotland average (52% over 55).

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<sup>1</sup> The total sample is less than the F2F plus the online samples combined as some visitors responded to both surveys.

<sup>2</sup> 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 impact of events has not been included in the regional analysis.

- Just under three quarters of visitors from the rest of the UK and overseas (73%) have been to Scotland before, while a quarter (25%) are first time visitors – this is similar to the Scotland-wide average (30% first time visitors).
- Visitors to Aberdeenshire tend to be enthusiastic and skilled golfers. In total, 86% are a member of a golf club, 81% play golf at least once a week (during the main golfing season) and 77% have an official handicap. Figures for Scotland as a whole show a very similar pattern of response.

### ***Planning and Booking***

- Visitors to Aberdeenshire used websites (52%), recommendations from family and friends (47%), advice from travel professionals (24%) and golf magazines (23%) when planning their trip. This was similar to the top four sources used by Scotland visitors as a whole.
- Over half of the visitors to Aberdeenshire (53%) booked their trip 3 months or more in advance, reflecting the overseas origin of visitors (60%). Again this was similar to the Scotland-wide sample (52%).
- Visitors' preferred method of booking is directly with the course online (58%) which is in line with Scotland visitors as a whole (53%).

### ***Motivations to Visit Scotland***

- Visitors from outside of Scotland (from the rest of UK and overseas) were asked the key factors that influenced their decision to visit **Scotland** to play golf.
- The top answers for visitors to Aberdeenshire were:
  - Having taken golfing holidays in Scotland before and wanting to return (mentioned by 51%). This was higher than the Scotland-wide sample (37%).
  - Wanting to play a particular course(s) (50%). Again, this was higher than Scotland-wide sample (31%)
  - Having always wanted to play golf in Scotland – The Home of Golf (40%)
  - Scotland's reputation as a golf destination (42%)

### ***Evaluation of Golf Visitor Experience***

- Visitors to Aberdeenshire provided very positive ratings of their golf experience. The average score out of 10 given by visitors when asked to rate the overall golf experience on the day of interview was 8.38. In total, 46% gave a score of 9 or 10 out of 10 for their golfing experience, with a further 30% providing a score of 8.
- These ratings are slightly lower than the overall average across Scotland (mean score – 8.93).

### ***Scotland: The Home of Golf***

- There are extremely high levels of agreement that Scotland is the Home of Golf, with 91% of visitors to Aberdeenshire agreeing with this. This was similar to the Scotland-wide sample (95%).
- In line with Scotland visitors as a whole, there are also extremely high levels of agreement across Aberdeenshire visitors with the following statements:
  - Scotland offers a good variety of golf courses (94%)

- Scotland's golf courses are of a high quality (98%)
- The golf club made me feel very welcome (95%)
- I experienced excellent customer service (94%)