



Scotland Golf Visitor Survey 2016

Regional Report – Carnoustie Country

Background and survey method

The data for the survey was collected by:

- Face-to-face interviews at courses across Scotland – 225 completed in Carnoustie Country
- Online survey sent to golf visitors – 46 golfing visitors to Carnoustie Country responded
- Total sample for Carnoustie Country – 241 respondents¹

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 Carnoustie Country is £19.6M (868 jobs supported)².

Profile of Golf Visitors

- Visitors to Carnoustie’s golf courses are more likely to be from Scotland (68% of visitors), and less likely to be from the rest of UK (8% of visitors) or from overseas (24%) compared to visitors to Scotland as a whole (50% from Scotland; 19% rest of UK; 31% overseas).
- While 55% of visitors to Carnoustie Country are staying overnight, this is lower than the average proportion compared to Scotland as a whole (65%) due to the higher proportion of Scotland residents visiting the area.
- The vast majority of golf visitors to Carnoustie Country (93%) are male, while only 7% are female. The proportion of female golf visitors to Carnoustie Country was lower than the Scotland average of 12%.

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

² 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.

- The age profile of golf visitors to Carnoustie Country is skewed to the older age groups: 55% are aged over 55 years. This profile is similar to the Scotland average (52% over 55).
- More than three out of five visitors to Carnoustie Country from the rest of the UK and overseas (62%) have been to Scotland before, while 38% are first time visitors – slightly more than the Scotland-wide average (30% first time visitors).
- Visitors to Carnoustie Country tend to be enthusiastic and skilled golfers. In total, 88% are a member of a golf club, 80% play golf at least once a week (during the main golfing season) and 89% have an official handicap. Figures for Scotland as a whole show a very similar pattern of response.

Motivations to Visit Scotland and Carnoustie Country

- 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.
- Similar to the Scotland-wide sample, the top answers for visitors to Carnoustie Country were:
 - Having always wanted to play golf in Scotland – The Home of Golf (mentioned by 64%)
 - Scotland's reputation as a golf destination (62%)
 - Having taken golfing holidays in Scotland before and wanting to return (42%)
 - Wanting to play a particular course(s) (25%)
- All respondents from Scotland and day visitors were asked the reasons for choosing to visit Carnoustie Country for their golf trip. The top answer given by those who stated a reason was that the course itself has a good reputation (17%). A quarter of visitors specified an 'other' reason – mainly to take part in a golf tournament/competition.

Evaluation of Golf Visitor Experience

- Visitors to Carnoustie Country 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 8.80. In total, 52% gave a score of 9 or 10 out of 10 for their golfing experience, with a further 30% providing a score of 8.
- These findings are very similar to the overall average across Scotland (mean score – 8.93).