



Scotland Golf Visitor Survey 2016

Regional Report – East Lothian

Background and survey method

The data for the survey was collected by:

- Face-to-face interviews at courses across Scotland – 166 completed in East Lothian
- Online survey sent to golf visitors – 111 golfing visitors to East Lothian responded
- Total sample for East Lothian – 237 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 East Lothian is £21.5M (635 jobs supported)².

Profile of Golf Visitors

- Visitors to East Lothian's golf courses are more likely to be from the rest of the UK (29%) or from overseas (39%) and less likely to be from Scotland (31% of visitors) compared to visitors to Scotland as a whole (50% from Scotland; 19% rest of UK; 31% overseas).
- More specifically, higher than average proportions of visitors come from England (29%), Europe (17%) and the USA (17%).
- A higher than average proportion of visitors to East Lothian stay overnight (73%) compared to Scotland as a whole (65%).
- The vast majority of golf visitors to East Lothian (90%) are male, with only one in ten being female (slightly lower than the Scotland average of 12% female)

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 East Lothian is skewed to the older age groups: 52% are aged over 55 years old. This profile is in line with the Scotland average (52% over 55).
- The majority of visitors to East Lothian from the rest of the UK and overseas (72%) have been to Scotland before, while 28% are first time visitors. This finding is very similar to the Scotland-wide average (30% first time visitors).
- Visitors to East Lothian tend to be enthusiastic and skilled golfers. In total, 88% are a member of a golf club, 82% 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.

Planning and Booking

- The main sources of information used by visitors to East Lothian while planning their trip tend to be websites (46%) and recommendations from family and friends (52%). This was the same top two sources used by Scotland visitors as a whole.
- Over three fifths (61%) of the visitors to East Lothian booked their trip 3 months or more in advance, reflecting the origin of visitors to the region. This was a higher proportion than the Scotland-wide sample (52%).
- The most frequently cited preferred method of booking golf tee times in East Lothian is directly with the course online (50%), which is in line with Scotland visitors as a whole (53%). A significant proportion of visitors also preferred calling the course to book (29%), again similar to findings across the Scotland-wide sample (21%).

Motivations to Visit Scotland and East Lothian

- 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.
- In common with the Scotland-wide sample, the top answers for visitors to East Lothian were:
 - Scotland's reputation as a golf destination (mentioned by 49%)
 - Having taken golfing holidays in Scotland before and wanting to return (48%)
 - Having always wanted to play golf in Scotland - The Home of Golf (46%)
- A higher than average proportion of visitors to East Lothian also mentioned recommendations from friends and family (22%, compared to Scotland average of 12%).
- All respondents from Scotland and day visitors were asked the reasons for choosing to visit **East Lothian** for their golf trip. The top reasons given were:
 - To play golf with friends, family or colleagues (mentioned by 42%)
 - It was recommended to me by friends, family or colleagues (33%)
 - The course has a good reputation (26%)
- Visitors to East Lothian were more likely to mention 'to play golf with friends/family or colleagues' or 'the region was recommended to me' than the Scotland-wide averages (19% and 11% respectively).

Evaluation of Golf Visitor Experience

- Visitors to East Lothian 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 8.87. In total, 63% gave a score of 9 or 10 out of 10 for their golfing experience, with a further 27% providing a score of 8.

- These findings are very similar to the overall average across Scotland (mean score – 8.93).

Scotland: The Home of Golf

- There were extremely high levels of agreement that Scotland is the Home of Golf amongst visitors to East Lothian, with 96% agreeing with this proposition. This was similar to the Scotland-wide sample (95%).
- In line with Scotland visitors as a whole, there were also extremely high levels of agreement across East Lothian visitors with the following statements:
 - Scotland offers a good variety of golf courses (99%)
 - Scotland's golf courses are of a high quality (98%)
 - The golf club made me feel very welcome (98%)
 - I experienced excellent customer service (92%)