



Scotland Golf Visitor Survey 2016

Regional Report – Fife

Background and survey method

The data for the survey was collected by:

- Face-to-face interviews at courses across Scotland – 233 completed in Fife
- Online survey sent to golf visitors – 55 golfing visitors to Fife responded
- Total sample for Fife – 288 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 Fife is £51.7M (1,802 jobs supported)².

Profile of Golf Visitors

- Visitors to Fife's golf courses are more likely to be from overseas (44%), equally likely to be from the rest of UK (15% of visitors) and less likely to be from Scotland (41% of visitors), compared to visitors to Scotland as a whole (31% from overseas; 19% rest of UK; 50% from Scotland).
- More specifically, a higher than average proportion of golf visitors to Fife come from North America (28%, compared to 19% across Scotland).
- The proportion of golf visitors who stay overnight in Fife (71%) is similar to Scotland as a whole (65%).
- The vast majority of golf visitors to Fife (88%) are male, while only 12% are female. (consistent with the average figures for Scotland golf visitors as a whole)

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 Fife is skewed to the older age groups: 51% are aged over 55. This profile is similar to the Scotland average (52% over 55).
- Three out of five visitors to Fife from the rest of the UK and overseas (59%) have been to Scotland before, while 41% are first time visitors – significantly more than the Scotland-wide average (30% first time visitors).
- Visitors to Fife tend to be enthusiastic and skilled golfers. In total, 84% are a member of a golf club, 78% play golf at least once a week (during the main golfing season) and 80% have an official handicap. Figures for Scotland as a whole show a very similar pattern of response.

Motivations to Visit Scotland and Fife

- 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 Fife were:
 - Having always wanted to play golf in Scotland – The Home of Golf (mentioned by 52%)
 - Scotland’s reputation as a golf destination (48%)
- Other popular answers included:
 - Having taken golfing holidays in Scotland before and wanting to return (29%)
 - Wanting to play a particular course(s) (28%)
- All respondents from Scotland and day visitors were asked the reasons for choosing to visit Fife for their golf trip. Of those who provided a reason, the most frequent response was that ‘the course has a good reputation’ (26%).

Evaluation of Golf Visitor Experience

- Visitors to Fife 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 9.03. In total, 67% gave a score of 9 or 10 out of 10 for their golfing experience, with a further 20% providing a score of 8.
- These findings are very similar (slightly higher?) to the overall average across Scotland.