



Scotland Golf Visitor Survey 2016

Regional Report – Highlands

Background and survey method

The data for the survey was collected by:

- Face-to-face interviews at courses across Scotland – 89 completed in the Highlands
- Online survey sent to golf visitors – 55 golfing visitors to the Highlands responded
- Total sample for the Highlands – 128 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 the Highlands is £23.2M (643 jobs supported)².

Profile of Golf Visitors

- Visitors to Highland golf courses follow a similar profile to visitors to Scotland as a whole, with 45% visiting from Scotland, 21% from the rest of UK and 34% from overseas. Those visiting Scotland as a whole were 50% from Scotland; 19% rest of UK and 31% overseas.
- Visitors to the Highlands were more likely to be staying overnight (83%) than the average proportion of overnight visitors to Scotland as a whole (65%).
- The vast majority of golf visitors to the Highlands (81%) are male, while 19% are female. The proportion of female golf visitors to the Highlands is slightly higher than visitors to Scotland as a whole (12%).
- The age profile of golf visitors to Highlands is skewed to the older age groups: 66% are aged over 55. This is an older age profile compared to the Scotland average (52% over 55).

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.

- A high proportion of visitors to the Highlands from the rest of the UK and overseas (81%) have been to Scotland before, while 19% are first time visitors – less than the Scotland-wide average (30% first time visitors).
- Visitors to Highlands tend to be enthusiastic and skilled golfers. In total, 92% are a member of a golf club, 88% play golf at least once a week (during the main golfing season) and 90% have an official handicap. Figures for Scotland as a whole are all lower (member 85%; play golf once a week 79%; handicap 83%).

Motivations to Visit Scotland and Highlands

- 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 the Highlands were:
 - Having taken golfing holidays in Scotland before and wanting to return (mentioned by 54%). This was higher than the Scotland-wide sample (37%)
 - Wanting to play a particular course(s) (47%). Again, this was higher than Scotland-wide sample (31%)
 - Scotland's reputation as a golf destination (46%)
 - Having always wanted to play golf in Scotland – The Home of Golf (29%)

Evaluation of Golf Visitor Experience

- Visitors to Highlands 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 9.07. In total, 65% gave a score of 9 or 10 out of 10 for their golfing experience, with a further 23% providing a score of 8.
- These ratings are slightly higher than the overall average across Scotland (mean score –8.93).