



Scotland Golf Visitor Survey 2016

Regional Report – South Scotland

Background and survey method

The data for the survey was collected by:

- Face-to-face interviews at courses across Scotland – 136 completed in the South of Scotland
- Online survey sent to golf visitors – 29 golfing visitors to the South of Scotland responded
- Total sample for South Scotland – 139 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 South Scotland is £6.3M (173 jobs supported)².

Profile of Golf Visitors

- Visitors to the South of Scotland's golf courses are more likely to be from Scotland (60%) or from the rest of UK (39%) compared to visitors to Scotland as a whole (50% from Scotland; 19% rest of UK). Almost no visitors from overseas (1% of the South Scotland sample) were interviewed, which is significantly lower than the Scotland-wide sample (31% overseas).
- A similar proportion of visitors to the South of Scotland were staying overnight (62%) as those who were visiting Scotland as a whole (65%)
- The vast majority of golf visitors to South Scotland (96%) are male, while only 4% are female, which is lower than the Scotland-wide sample (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 the South of Scotland is mixed, with 47% aged 25 to 54 years and 47% aged over 55 years. This profile is slightly younger than the Scotland average (52% over 55) which reflects the origin of the sample (60% of visitors are Scotland residents).
- Almost all visitors to South Scotland who were from the rest of the UK and overseas (92%) have been to Scotland before, while only 8% were first time visitors – less than the Scotland-wide average (30% first time visitors). This finding indicates that South Scotland attracts many repeat visitors from other parts of Scotland and the UK.
- Visitors to South Scotland tend to be enthusiastic and skilled golfers. In total, 75% are a member of a golf club, 77% play golf at least once a week (during the main golfing season) and 77% have an official handicap. However, figures for Scotland as a whole were slightly higher (member 85%; play golf once a week 79%; handicap 83%).

Motivations to Visit Scotland and South 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 South Scotland who stated a reason were:
 - Having taken golfing holidays in Scotland before and wanting to return (mentioned by 33%).
 - Recommendation from family/friends (27%)
 - Scotland's reputation as a golf destination (21%)
- All respondents from Scotland and day visitors were asked the reasons for choosing to visit **the South of Scotland** for their golf trip. The top answers given by those who stated a reason were:
 - It was recommended to me by friends / family (26%)
 - The course has a good reputation (23%)

Evaluation of Golf Visitor Experience

- Visitors to South Scotland 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 8.70. In total, 58% gave a score of 9 or 10 out of 10 for their golfing experience, with a further 25% providing a score of 8.
- These ratings are similar to the overall average across Scotland (mean score – 8.93).