



## **US Golfers Questionnaire Results and Analysis Summary - July 2006**

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**We at VisitScotland are keen to find out your opinions about golf holidays and, if you have visited Scotland before to play golf, we would like to hear all about your experience.**

# 1. Research Background and Methodology

In July 2006 a questionnaire was sent to 12,795 people who were on the VisitScotland US Golf database. The aim of the questionnaire was to gather information about their experience of golf, and to find out more about their golf holidays in Scotland. The questionnaire identified where in Scotland they went on their golf holidays and what sort of requirements they had in terms of accommodation, entertainment, transport etc. The research also identifies which destinations they went to instead of Scotland.

In total 657 responses have been received which is a return of 5% (only 67 were non-golfers, there interest was in golf events). Of these:

- 163 respondents (25%) have played golf in Scotland. Of these 74 respondents (11%) gave detailed information about their past trips.
- Only 18 (3%) of the respondents have played golf in Scotland or are planning to during the remainder of 2006.

The response from US golfers coming to Scotland in 2006 is disappointing. However, the information gathered from the larger group, who have been to Scotland to play golf previously, will prove useful.

## 2. Executive Summary

### Respondent background

- 65% of respondents have been on a golf holiday. Of these 75% said that their last golf holiday was in the US and 25% said that it was an international golf destination. 43% have played in Scotland at some stage.
- 84% of respondents visiting Scotland to play golf were male, with the majority being 45+.
- Only 37% of respondents are members of a golf course.
- 69% of respondents go on at least 1 golfing holiday a year.

### Message and Events

- "The Home of Golf" message resonates strongly with the US respondents.
- There are a large number of golf events on the US tour however; the 3 Majors are the most popular amongst our respondents.

### Getting to Scotland

- 51% of respondents flew directly to Scotland (the rest caught connecting flights).
- Ties with Delta, Continental, Globespan and Zoom should be strengthened to encourage greater numbers of golf tourists to make the direct trip to Scotland.

### Golf holidays in Scotland

- The most popular form of accommodation was 4 star Hotels and 3 star B&B's.
- Significantly 19% of hotel users were in 5 Star accommodation reflecting the demand for premium golf experiences.
- Individual spend per day is high due to the types of courses that US golfers are playing.
- Respondents wanted to play Links and Championship courses.
- Respondents were critical of our golf course practice areas, locker rooms and restaurants.
- The months of May and August-September were the most popular times to visit.
- The most common duration of golf break was 8-14 days. With 4-7 days the second most popular.
- Typically golf/accommodation etc was booked independently.
- 99% of those who have visited so far this year said that their overall experience was good or very good.
- Given the choice to play anywhere in the world 71% of total respondents chose Scotland.