



# Scotland Golf Visitor Survey 2016

## Regional Report – Perthshire

### Background and survey method

The data for the survey was collected by:

- Face-to-face interviews at courses across Scotland – 287 completed in Perthshire
- Online survey sent to golf visitors – 74 golfing visitors to Perthshire responded
- Total sample for Perthshire – 304 respondents<sup>1</sup>

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 Perthshire is £19M (521 jobs supported)<sup>2</sup>.

#### *Profile of Golf Visitors*

- Visitors to Perthshire's golf courses are more likely to be from Scotland (77% of visitors), equally likely to be from the rest of UK (17% of visitors) and less likely to be from overseas (7%) 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 from Scotland who visit Perthshire come from Fife (17%, compared to Scotland-wide average of 9%).
- A higher than average proportion of visitors to Perthshire are on day trips (61%) compared to Scotland as a whole (35%).

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<sup>1</sup> The total sample is less than the F2F plus the online samples combined as some visitors responded to both surveys.

<sup>2</sup> 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 majority of golf visitors to Perthshire (80%) are male, while only one in five (20%) are female. The proportion of female golf visitors to Perthshire is higher than the Scotland average as a whole (12%).
- The age profile of golf visitors to Perthshire is skewed to the older age groups: 57% are aged over 55 years old. This profile is similar to the Scotland average (52% over 55).
- The vast majority of visitors to Perthshire from the rest of the UK and overseas (89%) have been to Scotland before, while only 11% are first time visitors – significantly fewer than the Scotland-wide average (30% first time visitors). This finding indicates that Perthshire attracts many repeat visitors from other parts of the UK and overseas.
- Visitors to Perthshire tend to be enthusiastic and skilled golfers. In total, 89% are a member of a golf club, 88% play golf at least once a week (during the main golfing season) and 85% have an official handicap. Figures for Scotland as a whole show a very similar pattern of response.

#### ***Motivations to Visit Scotland and Perthshire***

- 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. Aside from those who visited to play a tournament at a specific course, the main answers for visitors to Perthshire were Scotland's reputation as a golfing destination and that they had visited Scotland before to play golf and wanted to return.
- All respondents from Scotland and day visitors were asked the reasons for choosing to visit **Perthshire** for their golf trip. The top answers given (by those who stated a reason) were having previously played the course before and wanted to return (17%) and to play in a tournament or competition.

#### ***Evaluation of Golf Visitor Experience***

- Visitors to Perthshire 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 8.76. In total, 60% gave a score of 9 or 10 out of 10 for their golfing experience, with a further 24% providing a score of 8.
- These findings are very similar to the overall average across Scotland (mean score – 8.93).