Scotland The Home of Golf

Driving Forward Together

Scottish Golf Tourism Development Strategy 2013 – 2020

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Foreword

As home of twelve in the world's Top 100 golf courses – five of them Open Championship courses – it is hardly surprising that Scotland is such a popular golfing destination. Golfers visiting Scotland can not only enjoy the chance to play world-famous courses, they can hit a long drive along one of Scotland's many links courses, or improve their game amidst stunning mountain views.

Scotland regularly hosts a number of major golf tournaments across all levels of the game including The Open Championship, Women's British Open, European Tour events and of course the Ryder Cup.

Scotland's economy benefits both directly and indirectly from golf tourism, and there is a positive synergy between golf and other key tourism sectors (such as food and drink). This symbiosis needs to be nurtured, encouraged and developed. The Strategy recognises that golf is just one of the many reasons that people visit Scotland.

As "The Home of Golf" – and with so many prestigious tournaments happening here – Scotland is ideally placed to capitalise on its unique position as a diverse and high quality golfing haven.

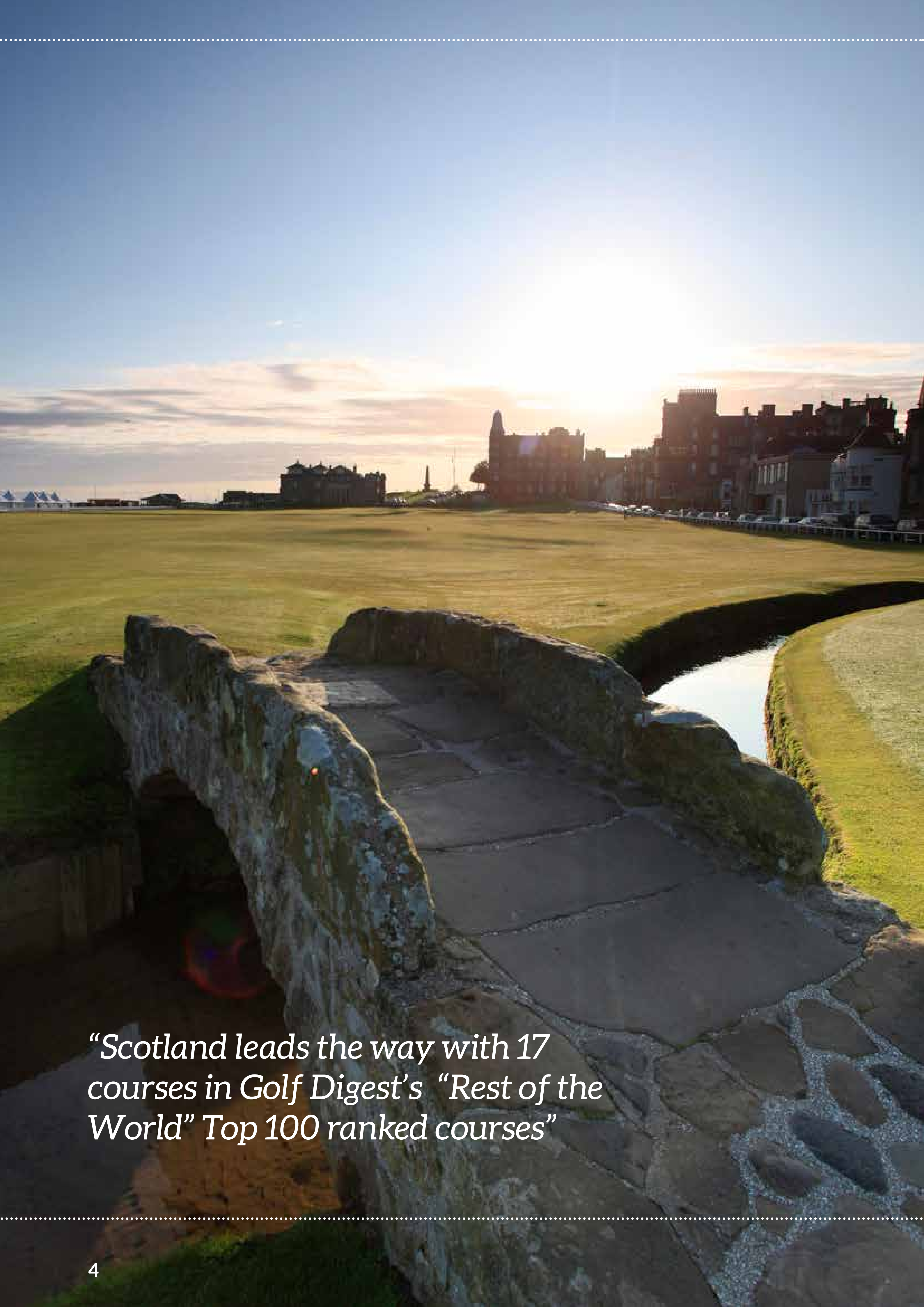
Scotland's Golf Tourism Development Strategy is industry led and sets out a clear vision for the long-term future of golf tourism in Scotland. The Strategy has been developed by, and with, the golf industry and highlights both the challenges and the opportunities for all businesses in the sector. It identifies seven key objectives, providing a clear roadmap for future development, marketing and investment in the sector in order to achieve the industry ambition for Scotland "to be the world's leading golfing destination by 2020".

Golf in Scotland represents an outstanding opportunity for players from around the world to experience the vibrancy of our culture, the beauty of our landscapes and, above all, the warmth of our welcome.

We can achieve this by working together, building on our existing strengths and using our people and experience to engage with visitors. Together we can capitalise on Scotland's golfing heritage and make our offering unbeatable.

Fergus Ewing MSP
Minister for Energy, Enterprise and Tourism
Scottish Government

"As 'The Home of Golf' – Scotland is ideally placed to capitalise on its unique position as a diverse and high quality golfing haven."



“Scotland leads the way with 17 courses in Golf Digest’s “Rest of the World” Top 100 ranked courses”

Introduction

Over the last decade, golf tourism in Scotland has benefited from numerous regional and national initiatives designed to boost the industry in the short, medium and long-term.

Whilst this has undoubtedly has some positive impact, it's time to review our approach and explore ways to maximise future opportunities. Complacency is not an option.

This need for a new approach and more formal strategy has been highlighted by a number of factors:

- **The 2014 Ryder Cup at Gleneagles**
- **The known growth ambitions of the golf tourism sector for 2020**
- **The desire for a more collaborative industry led approach at all levels**
- **Golf clubs need for more effective governance and greater business development support in the face of the economic downturn**

The publication of this Strategy signals a renewed commitment by everyone dedicated to achieving golf tourism growth in Scotland. The Strategy has been drawn up by the Golf Tourism Development Group (which is made up of Golf Tourism Scotland, Scottish Golf Union/Scottish Ladies' Golfing Association, VisitScotland, EventScotland, Scottish Development International, and Scottish Enterprise/Highlands and Islands Enterprise), following an extensive consultation with a range of key industry partners.

From a policy perspective, the Strategy is consistent with (and closely aligned to) a number of other key national and regional strategies. The Government Economic Strategy, for example, specifically highlights the potential benefits and opportunities that will arise from Scotland hosting The Ryder Cup, whilst the recently published National Tourism Strategy seeks to encourage investment in key Scottish tourism assets such as golf.

Increasing golf tourism income is also a critical part of the new Scottish Golf Framework. It is widely recognised that the next decade provides a "window of opportunity" to re-position Scotland as the world's leading golfing destination.

"70% of golf tourists to Scotland originate from the UK and Ireland and 30% from overseas"

Golf Tourism Market Overview

Golf Globally

Golf is globally popular. Between 1991 and 2011, the number of registered golfers in Europe increased from 1.5 million to 4.4 million[1]. There are more than 32,000 golf courses around the world, attracting around 56 million golfers[2]. It is estimated that in 2009 alone, over 63 million golfing holidays – with a total value of £16.4 billion (US $25.3b) were taken around the world.

In 2011, however, after twenty years of growth, Europe's golf market experienced its first decline in golf participation, with a net loss of 46,000 registered players. Nine countries reported this decline, with the most significant falls in three large golf markets[3] (including the UK and Ireland), where the number of registered golfers has been falling since 2007.

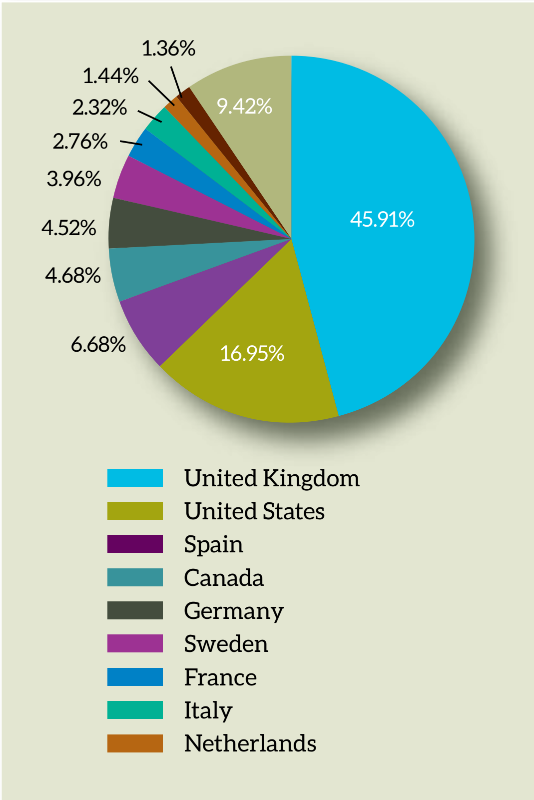
To give proper context, it should be noted that in the UK and Ireland, golfers do not need to be registered to play golf, so the reduction in registered players is attributable to a fall in club membership. Many of these "casual golfers" continue to play on a green-fee (daily pay-and-play fee) basis. Whilst membership has fallen, participation remains strong at 8% of the adult population.

1 Source: KPMG
2 Mintel Leisure Intelligence 2009
3 Sweden -21,000 (-4.1%), UK & Ireland - 42,700 (-3.1%) and Spain -9,700 (-2.9%).

Golf in Scotland - How it all adds up

- In revenue terms, golf tourism is worth £220m a year to the Scottish economy and directly supports over 4,400 Scottish jobs
- Scotland has 597 courses, but around 80 clubs generate 75% of the nation's green fee revenues
- 70% of golf tourists visiting Scotland are from the UK and Ireland
- In 2010, approximately 135,000 golf visitors played 700,0000 rounds in Scotland (a figure possibly boosted by the fact that St Andrews hosted the Open that year)
- In 2011, approximately 674,000 rounds were played in Scotland by around 126,000 golf visitors
- In 2012 visitor numbers were down by 2.52%, and revenue by only 0.75% compared to 2011.
- Scotland regularly attracts some of the world's biggest golf tournaments and players. Over the next three years Scotland will welcome The Open Championship (2013, 2015 and 2016); The Ricoh Women's British Open (2014) and The Ryder Cup (2014)
- Scotland boasts an impressive seventeen courses in Golf Digest's "Rest of the World" Top 100 ranked courses
- Fife was awarded Best European Golf Tourism Destination at the International Association of Golf Tour Operators (IAGTO) Travel Awards 2012
- Scotland was named Best Golf Destination of the Year in 2009 by IAGTO
- Based on results from the 2011 Great Britain Day Visit Survey (GBDVS), there were 3 million tourism day trips in Scotland where playing golf generated £88 million in expenditure
- Current rankings from KMPG Golf Travel Insight place Scotland third in their list of popular golf destinations

Visitors to VisitScotland Golf 2012 (www.visitscotland.com/golf)



Scottish Golf Intelligence

Scottish Golf Intelligence (www.golfmonitor.co.uk) is a partnership between the Scottish Golf Union, VisitScotland and Scottish Enterprise. It was established to help golf clubs make more evidence-based decisions. Key findings include:

- Visitor numbers for the period 2011-12 are down by 2.52%, with revenue falling by 0.75%
- The figures for 2012 and 2011 were not adversely affected by the Open not being held in the country in those years
- There is a continuing trend towards play over links courses (especially small links courses), which may be connected to Scotland's heavy rainfall
- Most of Scotland's golfing visitors are from within the UK

Golf Events

Golf events are a key feature of Scotland's annual event calendar. Hosting high-profile events helps increase Scotland's profile as a golf destination. Scotland regularly welcomes:

- The Open Championship
- RICOH Women's British Open
- Aberdeen Asset Management Scottish Open
- SSE Scottish Senior Open

The 2014 Ryder Cup and Junior Ryder Cup will further raise the profile of Scotland as a golf destination, as well as showcasing Scotland to a wider (non-golfing) audience.

The Value of Golf to Scotland's Economy

KPMG, in association with Oxford Economics, undertook an independent evaluation of Scotland's golf industry. The study assessed six key economic clusters of the Scottish golf industry. These were golf facility operations, golf course capital investments, golf supplies, golf tournaments and endorsements, golf tourism, and golf real estate.

The key findings were:

- **Scotland's total golf economy generates £1.171 billion for the wider Scottish economy**
- **The golf industry supported 20,000 people in employment**
- **There are over 600 golf facilities operating in Scotland in 2011, including driving ranges and practice-specific facilities, (597 of these are golf courses)**
- **Golf participation in Scotland, measured as a percentage of population, is among the highest in Europe. More than 4.5% of the population are registered golf club members**
- **Scottish Golf Tourism generated £120 million[4] of revenue in 2011**
- **In 2011, golf tournaments and endorsements generated total revenues of £46 million**

4 The SQW Market Analysis estimated the total economic impact of golf tourism at £220 million in revenue terms. This figure included visitor green fee revenues, tourist spending on equipment whilst visiting and attendance at tournaments, and therefore is higher than the figure stated in the KPMG report where these elements are accounted for in other sectors.

"Golf tourism in Scotland could generate a potential £300m for the Scottish economy by the end of the decade"

Future Prospect

Whilst no tourism sector had escaped the impact of the global financial crisis, it is anticipated that (thanks to the varied demographic of its participants) golf tourism will fare better than other sectors (Mintel 2010).

In 2011, Spain and Portugal remained – along with the UK and Ireland – the most popular golf destinations. Emerging markets such as Thailand, Vietnam and Turkey also enjoyed an increase in visitors, whilst Italy and Bulgaria emerged as potential golf tourism hot spots (KPMG).

KPMG's Golf Travel Insights 2012 indicated that over two-thirds of global tour operators expected slight growth in golf tourism in the short- to medium-term, whilst around a fifth of those surveyed expected stagnation. Although 9% pessimistically expect a decline, 4% anticipate spectacular growth for the sector. (It should be noted that tour operators' expectations about the future of their business are linked to which destinations they specialise in).

According to IAGTO, golf tourism bounced back faster than most other tourism sectors. It has recovered strongly over the past four years, but is still less consistent and predictable than in pre-crisis times. The destinations most likely to prosper in the future are those offering a strong product mix, great value for money and informative promotional strategies.

According to research by independent consultants SQW Ltd[5], the golf tourism industry in Scotland could grow by almost 30%, generating a potential £300m for the Scottish economy by the end of the decade. The research, which included a survey of Golf Tourism Scotland (GTS) members, explored the potential growth and economic impact of the market in Scotland to 2020 . It found that despite the recession and continuing economic challenges, the market has remained relatively resilient with around 80% of respondents expecting to see positive growth in the future.

Due to Scotland hosting the Open Championship, The Ryder Cup and other events, rapid growth is expected until 2015. New top-quality courses, such as Castle Stuart, the Trump Development and Machrihanish Dunes, are also having a positive impact.

From 2015 onwards, the traditional golf markets of North America and the UK are expected to remain fairly flat. This will be partly offset by faster growth from the rest of the world – particularly emerging markets. The Wyndham Golf Resort development, as well as broadening of air route access into regional markets, may also shift the visitors further east, with the northeast, the Highlands, Fife and East Lothian benefitting.

5 An Assessment of Golf Tourism's Future Growth Potential to 2020, published January 2011

The Challenges Ahead

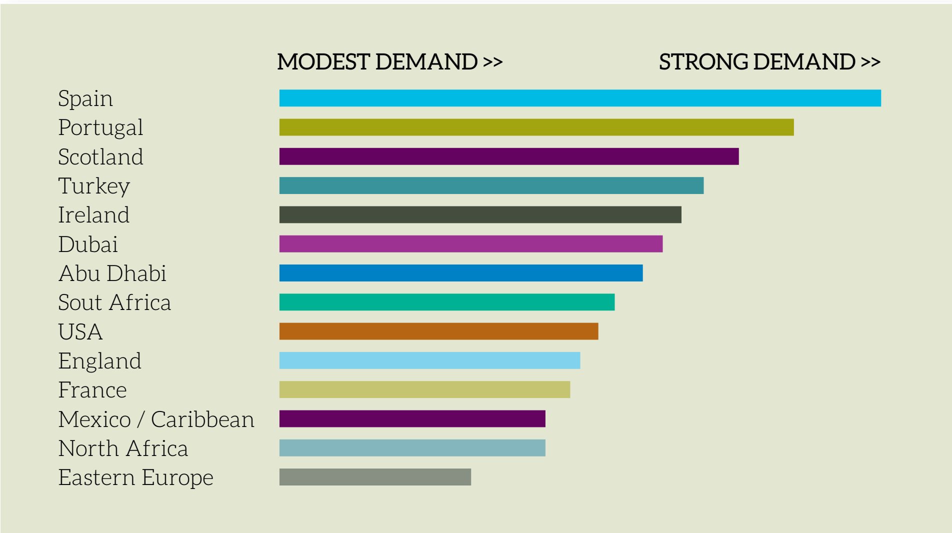
The patterns for individual markets are also expected to change. SQW anticipated only modest increases in the number of players from the domestic market between 2010 and 2015 with stagnation or decline possible after 2015.

The US golf visitor market follows a similar pattern after the initial boost provided by the events and the opening of new golf resort developments. Growth from Europe is expected to slow slightly after 2015. It is predicted that, by the second half of the decade, the main source of growth will be from the rest of the world. By 2020, it is predicted that there will be almost as many visitor trips from the rest of the world as there currently are from North America.

Since the publication of the SQW report, the recession has deepened dramatically (particularly in Europe), it may, therefore, be appropriate to expect slightly more modest levels of growth than initially anticipated.

Recent benchmark reports suggest that – compared to its competitors – the industry in Scotland is coping well with the current economic crisis. In the KPMG Golf Travel Insights report 2013, Scotland is ranked third in the world in terms of future golfing tourism hotspots. However, in an increasingly competitive global marketplace, Scotland cannot afford to be complacent.

Hotspots for golf tourism in the coming years



Source: KPMG Golf Travel Insight report 2013

"Scotland is ranked third in the world in terms of future golfing tourism hotspots"

Scotland™
The Home of Golf

"Golf is in Scotland's DNA"

SWOT Analysis

What specific issues do the industry and its partners need to address over the next decade?

The Golf Tourism Development Group is working locally and nationally with the golf industry to address the weaknesses and threats facing the sector. It is also working with them to identify ways to capitalise on Scottish golf's strengths and capitalise on opportunities to make Scotland the world's leading golf destination.

Table 1

THE KEY ISSUES	
STRENGTHS	**WEAKNESSES**
• Scotland's diversity and quality of golf courses (especially links courses) • Scotland's status and heritage as "The Home of Golf" • The industry experience and knowledge offered by a wide range of operators • Golf is in Scotland's DNA • Scotland's courses are accessible, with short journey times between many courses • A strong media profile due to regularly hosting prestige tournaments • Long daylight hours in summer • Scotland has many other attractions, making it a tempting proposition for visitors	• Customer service levels are inconsistent • Consumers have negative perceptions (cost, course difficulty, access etc) • Scottish clubs have been slow to adopt online tee time booking • Some clubs are reluctant to engage with others in the industry • There is fragmentation in the industry, especially at a local level • There isn't a central resource for booking a golf trip to Scotland • Discrepancies between the quality of the courses and the rest of the experience • Some clubs are financially marginal with weak governance
OPPORTUNITIES	**THREATS**
• Scotland hosts numerous high-profile golf events, such as the Ryder Cup • More new quality courses are opening, attracting more high-spending visitors • Online tee time booking and national booking facilities could be developed • There is scope for developing a "Team Scotland" approach, with the emphasis on working together within the industry • Develop digital media strategies to promote Scottish golf • Promote autumn and winter golf, especially to the Scandinavian and staycation markets • Develop a better understanding of customer perceptions and needs • Encourage private members clubs to embrace change	• The industry continues to operate in a fragmented, ad hoc way • There is increased global competition from new markets such as the Middle East • Visitor numbers to Scotland are falling • Some clubs are resistant to the idea of online tee time booking • There is a reluctance to gather and use market intelligence to make informed decisions and plans • The impact of public sector spending cuts • Inbound flights from certain key markets are being withdrawn or reduced • There is a general failure to capitalise on key events such as the Ryder Cup • High rainfall is impacting on the playability of some courses

What strategic objectives are the partners committed to in addressing the SWOT analysis?

The Vision, Strategic Objectives and Actions

The Vision

Based on this market analysis, the strengths of our golf industry, the appeal of Scotland for golf, the hosting of events, and the fact that Scotland is "The Home of Golf" the Vision for Golf Tourism in Scotland is:

"By 2020, Scotland will be the world's leading golfing destination"

To realise this vision, the strategy will support the growth of golf tourism aligned with seven strategic themes; the successful delivery of which will result in:

1. A high quality golf product and experience that motivates the visitor to spend more, stay longer and generate positive word of mouth and recommendations
2. Support for industry by enhancing and continually improving visitor packages and experiences that support and build the reputation of the "The Home of Golf" brand.

Strategic Objectives

The findings have been used to develop seven strategies – and associated actions to guide tourism delivery and sustainable growth for Scotland as a golfing destination over the next five years.

Strategies to achieve the vision

1. Collectively and consistently brand and promote Scotland as "The Home of Golf"

Scotland is "The Home of Golf". This is our USP – nowhere else in the world can make this claim. It gives us a unique, unrivalled and unmatched selling point. By adopting a consistent approach to the brand and message, we can reinforce and enhance Scotland's golfing reputation across the globe. It is vital then that (where appropriate) all partners work together to achieve optimum value from promoting Scottish golf as a whole to the rest of the world.

2: Encourage an evidence-based approach by gathering quality visitor data, sharing market intelligence, best practice and research findings with industry

Achieved by clubs and national agencies gathering quality visitor data, sharing market intelligence and best practice from other successful golf tourism destinations and sharing research findings with industry. It is crucial to know and understand what golfers from different markets want, as ensuring that Scotland meets these needs is essential if we are to be truly competitive globally.

Information gathering is vital for marketing and developing the golf tourism product, yet few clubs and courses know who their markets are, where they come from or even how often they play. Plus the quality of welcome at clubs is not always as warm as it could be.

3: Strengthen industry leadership and engagement

Fostering better industry leadership is a key principle of the recently updated National Tourism Strategy – it is also a core part of the Golf Tourism Development Strategy. The best way to get results is by working together, as such it is important that Golf Tourism Scotland is seen as the credible representative of golf tourism in Scotland, supported by an integrated network of regional golf development groups.

4: Co-ordinated regional golf development groups (RGDGs)

A common perception is that, currently, regional golf tourism partnerships tend to be industry informed rather than industry-led. The medium-to long-term aim is to move to a position of having a strong industry-led approach.

Sustainability of RGDGs is crucial. Currently the public sector is contributing to partnerships with both time resources and direct funding. Best practice examples include Golf East Lothian, Carnoustie Country and the Fife Golf Partnership; all of which benefit from an annual funding contribution from the public sector. Not all golf visitor destinations in Scotland have RGDG's, the challenge – particularly in the short-term – will be to support the development of regional golf groups in those areas where market failure persists despite known growth potential (e.g. in Aberdeenshire, Perthshire and Ayrshire).

5: Improve the quality of the golf tourism experience to boost reputation, increase visitor numbers, spend and repeat visits

Golf clubs lie at the heart of the golf tourism offering. The aim is to continue to provide clubs with Governance and Business Planning support in order to equip them for growth. Aligned to developing a more evidence based approach initiatives to measure and improve customer service levels will be a priority.

Encouraging clubs to adopt on line tee time booking will also serve to improve the customer journey and the market intelligence that can inform future marketing plans and initiatives to improve the overall customer experience.

6: Maximise the impact and tourism opportunities from hosting major golf events

Prestigious events such as The Ryder Cup at Gleneagles in 2014 provide Scotland with the perfect platform to reinforce its position as "The Home of Golf" and showcase itself as the ideal location for world-class events. When delivering such major events, the public and private sectors must work together to ensure that every opportunity to drive additional investment in the Scottish economy is seized upon. This events-based activity relates directly to the golf tourism product in Scotland, but also impacts on a large number of aspects of the golf industry from golf participation to inward business investment in Scotland.

7: Promote sustainable golf club and course management

Educate and support clubs to integrate resource efficiency, nature and community into their decision making. Promote clearly the business benefits of sustainability, and support marketing initiatives that show Scottish golf as a global leader in presenting outstanding golfing experiences that are directly connected to the country's natural and cultural heritage.

What specific actions, will be undertaken to support of the Strategy?

Action Plan 2013 - 2016

Market research confirms that Scotland faces increased competition in the international golf tourism market. It is widely recognised that we need to be proactive in all areas of product and business development, customer service, marketing, research, skills training and innovation in order to meet these challenges.

An initial three year Action Plan has been drawn up which identifies a range of initiatives which will be key in helping to meet the growth target of 20% by 2020. The Action Plan is not a definitive "things to do" list but a guideline of what can be done by the lead partners and the industry during this time. As such, support for new projects will be assessed on the basis of how well they fit with the key objectives. The Action Plan itself will be monitored quarterly and reviewed annually to ensure that it remains relevant and enhances golf tourism's contribution to the Scottish economy.

SMART Objectives

The initial three year Action Plan has identified the following SMART Objectives that together will help delivery of each of the seven key objectives:

"The Action Plan itself will be monitored quarterly and reviewed annually"

OBJECTIVE 1:	A consistent approach to presenting Scotland's brand, "The Home of Golf"
KEY OBJECTIVES	**ACTIONS**
1. Ensure increased awareness of Scotland's USP as "The Home of Golf"	• Develop "The Home of Golf" brand guidelines • Ensure brand guidelines (and logo usage information) are accessible to all businesses marketing and promoting golf tourism • Develop an image bank for "The Home of Golf" which will be updated annually to ensure that it accurately reflects the brand, product and visitor experience
2. Address consumers' perceptions of Scotland regarding costs, difficulty (level of skill required), availability and accessibility by promoting accessible products and offers throughout the season	• Accelerate the use of social media to build "The Home of Golf" brand and raise its profile (i.e. by encouraging individual clubs and golf tourism related businesses to adopt its use) • Develop consumer and trade marketing campaigns for key international and domestic target markets
3. Increase the number of new visitors to www.visitscotland.com/golf by 25% per year	• Use the URL as the primary call to action on all marketing and promotional material • Encourage tourism operators to promote the URL on their web sites • Encourage tourism businesses in Scotland to promote and showcase tourism product and offers via visitscotland.com/golf
4. Increase seasonal spread of golf marketing activity to continue promotion of Scotland throughout the autumn and spring seasons, selling Scotland as a year-round golf destination	• Undertake marketing activity which emphasises off-peak periods in order to extend the season and optimise year-round capacity • Support VisitScotland's campaigns by encouraging trade participation in travel trade and consumer promotion, providing product offers and web content

OBJECTIVE 2:	Encourage an evidence-based approach by gathering quality visitor data, sharing market intelligence, best practice and research findings with industry.
KEY OBJECTIVES	**ACTIONS**
1. Provide a three year market research and intelligence fund to support the Golf Tourism Monitor and Benchmarking Tool, future Economic Impact Assessment (EIA) work and other feasibility exercises	• Encourage golf clubs to participate in Golf Tourism Monitor by registering at www. scotgolfintel.co.uk • Use facilitated "listening to your customers" workshops to encourage the industry to gather customer feedback • Develop future programmes based on up-to-date research on visiting golfers from different markets
2. Disseminate key research to all golf clubs and tourism businesses with an interest in visiting golfers	• Distribute research findings through partners and TIS websites and e-newsletters

OBJECTIVE 3:	Strengthen industry leadership and engagement
KEY OBJECTIVES	**ACTIONS**
1. Achieve delivery of the national GTS Action Plan 2013-2016 as per annually agreed project targets	• GTS to champion the strategy and engage with Golf Tourism industry at all levels • Build a comprehensive database of golf tourism product and operators • Develop a communication plan based around engaging regularly with tourism businesses. Use newsletters to provide information and updates on Golf Tourism opportunities and performance
2. Organise a series of forums to discuss regional golf development strategies	• Host an annual Golf Tourism Forum for all businesses involved in Golf Tourism • Host a minimum of four regional forums encouraging existing and new tourism businesses to work together in areas such as marketing, promotion, product development and marketing packaging, e-commerce and e-booking
3. Develop a more integrated approach within the Scottish Tourism structure	• Facilitate networking in the Golf Tourism sector by encouraging golf operators, course, clubs, staff, suppliers and stakeholders to share information, best practice strategies and knowledge
4. Plan and identify resources for GTS to deliver to these objectives, including staffing	• Set out the roles and responsibilities of additional team members and identify the resources required to make it happen
5. Working with VisitScotland adopt a more consumer facing approach by providing GTS members and other tourism businesses opportunities to promote their offering to both UK and overseas markets	• Use social media. Develop marketing activity plan to establish consumer email contact. Engage with them regularly via special offers, competitions etc to build the database • Build relationships with the golf and travel media internationally to raise the profile of golf tourism • Work with IAGTO to facilitate familiarisation visits for golf tour operators
6. Advocate on behalf of the golf sector on issues that impact Scotland's performance in the international market place	• Work with public agencies, the tourism industry and other businesses to identify policies and practices which will benefit the golf tourism industry in Scotland • Work with the Scottish Tourism Alliance and other industry groups to improve Scotland's air connectivity with key overseas markets

OBJECTIVE 4:	Co-ordinated regional golf development groups
KEY OBJECTIVES	**ACTIONS**
1. Support six industry networks / associations by December 2014	• Encourage best practice between regional golf groups via a programme of learning journeys by December 2015 • Work with the golf industry at regional level in all areas of product and business development, customer service, marketing, research, skills training and innovation
2. Establish three new regional golf tourism industry collaborations (i.e. in Aberdeen (City and Shire), Ayrshire and Perthshire	• Carry out market research on key regional golf opportunities by September 2013 • Organise a series of industry-led workshops designed to encourage more formal collaboration between golf tourism businesses in these regions by September 2013 • Prepare and implement three new regional Golf Tourism Action Plans by December 2013
3. Assist delivery of existing regional golf tourism Action Plans (i.e. in Fife, Angus and East Lothian)	• Identify and deliver key projects that offer genuine value added at the national level

"Use social media and develop marketing activity plan to establish consumer email contact"

OBJECTIVE 5:	Improve the quality of the golf tourism experience to boost reputation, increase visitor numbers, spend and repeat visits
KEY OBJECTIVES	**ACTIONS**
1. Provide online booking systems for up to 80 clubs by December 2014	• Continue supporting clubs both with the costs of implementing online booking and the process of moving to online systems
2. Provide product development support for up to 80 "tier 2" courses throughout Scotland by December 2014	• Support clubs to specifically attract additional visitors, increase revenues and improve visitor experience, thus enhancing Scotland's reputation as a welcoming golfing destination • Encourage collaboration and product development with golf courses, tour operators etc working together with others in the tourism sector to develop golf experiences in key markets
3. Implement Governance Action Plan at 120 clubs	• Continue supporting clubs through the business planning process
4. Provide a tool for the measurement of customer satisfaction at golf clubs	• Use facilitated training workshops to encourage clubs to gather feedback via newly introduced customer satisfaction surveys
5. One hundred Level-1 and fifty Level-2 graduates will complete the Club Management Development Programme (MDP)	• Continue supporting clubs with the Management Development Programme (MDP)
6. Explore the possibilities of introducing a voluntary visitor Quality Assurance Scheme for all clubs in Scotland	• Establish an industry working group to gauge reactions, scope the feasibility and test the concept of a Golf Visitor Quality Assurance Scheme

"Encourage product development with golf courses and tour operators to develop golf experiences in key markets"

OBJECTIVE 6:	Maximise the impact and tourism opportunities from hosting major golf events
KEY OBJECTIVES	**ACTIONS**
1. Work with Ryder Cup Europe, the R&A, the European Tour and other event organisers to ensure that Scottish-based companies derive maximum economic benefit from local procurement/ supply chain business opportunities associated with major golf events	• Event procurement opportunities for suppliers to be advertised on Public Contracts Scotland portal • Event briefing and networking events to be held to support business understand procurement procedures of events
2. Consult with the industry to agree an annual attendance programme at key overseas tour events/trade and consumer shows under the umbrella banner of Scotland, 'The Home of Golf"	• Identify all relevant golf trade events where Scotland may have a presence • Prepare an events / trade workshop programme of activity identify the priority events where Scotland should be present • Promote opportunities of attendance at events to industry
3. Work with the R&A to deliver support to the Open Championship as per the agreed Memorandum of Understanding between VisitScotland, EventScotland, Scottish Enterprise and the host Local Authorities	• Continue to work with all partners to maximise the local and national benefits to Scotland from hosting The Open Championship
4. Carry out robust Economic Impact Appraisals of major golf events in Scotland as a basis for future investment/event promotion purposes	• Commission research into the economic impact of the Scottish Open, the Open, the Women's Ricoh Open and other key golf tournaments when they are staged in Scotland
5. Support the delivery of major international golf industry events/conferences	• Identify golf industry events and conferences and explore what's needed to bring them to Scotland

OBJECTIVE 7:	Promote sustainable golf club and course management
KEY OBJECTIVES	**ACTION**
1. Educate and support clubs in the integration of resource efficiency, nature and community into their decision making	• Communicate regularly with clubs on sustainability issues and solutions • Promote the business benefits attained by clubs adopting a sustainable approach
2. Clearly promote the business benefits of sustainability and support marketing initiative which showcase Scottish Golf's ability to deliver outstanding golf experiences which connect with the country's heritage	• Run workshops and training events • Encourage clubs to take part in initiatives such as the GEO OnCourse™ programme • Encourage and reward clubs and regions that achieve GEO Certified™, golf's international eco-label

Who will implement the Strategy?

Making It Happen

Despite its status as "The Home of Golf", Scotland cannot, and should not, become complacent when marketing its golf offering. It is no longer enough to have an unrivalled golfing heritage; to attract visitors in an increasingly competitive market, you have to push and promote your USP.

The success – or otherwise – of "Driving Forward Together" will depend on the enthusiasm and commitment of all stakeholders in the Scottish golf industry. Collaborative working at all levels will be encouraged as part of an integrated partnership approach to Strategy delivery. Golf clubs will be encouraged to actively engage with other golf tourism businesses within their area to ensure a joined-up approach to delivering a quality visitor experience.

Roles and Responsibilities

The industry needs to recognise its pivotal role in implementing the Strategy (with support from the Scottish Golf Tourism Development Group comprising GTS, VisitScotland, EventScotland, SGU/SLGA, SDI, Scottish Enterprise and HIE).

Organisations and their Roles

Golf Tourism Scotland (GTS)

Golf Tourism Scotland (GTS) is a not for profit industry association owned and governed by its membership. It represents the diverse golf tourism interests in Scotland. GTS aim is to increase the volume and value of golf tourism to Scotland and to play a leading role in influencing specific public and private sector activities relating to the development of golf tourism in Scotland.

VisitScotland

Supporting the golf tourism industry by delivering marketing and communication activities on a global level, with a focus on key markets, which informs and inspires golfers about Scotland's golf product and our USP as "The Home of Golf".

"It is no longer enough to have an unrivalled golfing heritage; to attract visitors in an increasingly competitive market"

EventScotland

The national events agency also has lead public sector responsibility for the successful delivery of The 2014 Ryder Cup and will continue to work with the golf tourism industry to ensure that opportunities presented by hosting this major event, and others like it held in Scotland every year, are delivered.

Scottish Development International (SDI)

SDI is a joint venture between the Scottish Government, Scottish Enterprise, and Highlands and Islands Enterprise. It will deliver support to golf related companies looking to invest in Scotland including resort, golf course and hotel developers. From an exporting perspective, SDI will also provide support to Scottish-based golf businesses looking to develop their international markets and trade globally.

SGU/SLGA

Supporting the golf tourism industry by investing in club management education, the development of club governance and business planning tools, golf course and environmental advice, and tools to assist clubs in measuring and delivering improved customer service. These services will be delivered by a team of Club Development Officers, establishing close working relationships with clubs and will also serve to promote cooperative working amongst clubs.

Scottish Enterprise

Supporting the golf tourism industry via the development of industry leadership, the dissemination of market intelligence; the delivery of targeted business development assistance for golf clubs & other golf related businesses as well as support for collaborative regional development activity.

Highlands and Islands Enterprise

Highlands and Islands Enterprise (HIE) recognises that golf tourism plays a vital role in supporting and growing the economy of the region. HIE will work with businesses within the golf tourism sector that are ambitious, and can demonstrate a desire to grow and contribute to the long term success of this important sector. By joining forces, HIE and its clients can plan for growth, either by expanding their markets or by developing new products or services.

Regional Golf Development Groups (RGDGs)

At a regional level, there are established industry collaborations and much of the work to date has revolved around capacity building and area marketing. Moving forward the RGDGs will be supported to ensure that the scale of market opportunity is achieved in the short, medium and long-term.

The Regional Golf Development Groups role will be to encourage and improve co-ordination and networking opportunities, sharing best practice and encouraging product, business skills and events development.

Golf Environment Organisation (GEO)

GEO is the international, industry-supported non-profit organisation, entirely dedicated to the support and promotion of sustainability in golf. GEO can benefit the golf tourism industry in Scotland by providing a widely-endorsed online sustainability support programme, OnCourse™, that helps golf clubs evaluate and improve resource efficiency, environmental performance, and community value. GEO also administers golf's international ecolabel, GEO Certified™, the symbol of great golf environments worldwide.

Conclusion

Scottish golf tourism will enjoy a significantly enhanced global profile between 2014 and 2020. The plan is to stimulate growth and success for the future of the industry. In tough economic climates, the Strategy represents an opportunity for the golf tourism industry to capitalise on the enhanced profile afforded by the hosting of major events (such as The Ryder Cup, the Open Championship, the Scottish Open and the Ricoh Women's British Open).

The introduction of this Strategy is designed to act as a motivator and catalyst for the whole Scottish golf industry to grab the moment and ensure that by working together a "step change" will be experienced ensuring that Scotland will indeed be "the world's leading golfing destination" and that our position and reputation as "The Home of Golf" will be enhanced even further.

Contacts

To find our more on how to support golf tourism in Scotland contact:

Golf Tourism Scotland – www.golftourismscotland.com
Scottish Golf Union – www.scottishgolf.org
Scottish Enterprise – www.scottish-enterprise.com
Scottish Development International - www.sdi.co.uk
Highlands and Islands Enterprise – www.hie.co.uk
VisitScotland – www.visitscotland.org
Event Scotland - www.eventscotland.org
Golf Environment Organisation - www.golfenvironment.org

Photography

Cover:

- James White tees off in Scottish Amateur over Lansdowne Course, Blairgowrie.

Kenny Smith Photography

Inside Cover

- Roxburghe Golf Club near Kelso, Scottish Borders

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- The Swilcan Bridge on the 18th fairway, The Old Course at St. Andrews, Fife

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- Carrbridge Golf Club, Cairngorms National Park, Highlands of Scotland

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- 9th Green - Cruden Bay Golf Club, Aberdeenshire
- Rowallan Castle Golf Club, East Ayrshire.
- Rosemount Course - The Blairgowrie Golf Club, Perthshire

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- PGA Centenary Golf Course at Gleneagles, Perthshire

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- Aberdeen Asset Management Scottish Open, Castle Stuart Golf Links

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- Scottish Amateur over Lansdowne Course, Blairgowrie.

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- Dragon's Tooth Golf Club, Ballachulish, Highlands of Scotland

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- The Duke's Golf Course at St Andrews

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- Dunaverty Golf Club by Southend, Kintyre, Argyll
- Duke's Course at St. Andrews, Fife
- Driving range at The Gleneagles Hotel, Perth & Kinross

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- 2nd hole (Fairy Dell) Wee Course
- The Village at Machrihanish Dunes
- Panmure Golf Club, Barry, Angus

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- Background image - Cardrona Golf Course in the Tweed Valley, Scottish Borders

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- Kings Golf Course at Gleneagles, Perth & Kinross

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- Duke's Course at St. Andrews, Fife

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- Machrihanish Dunes

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- Stromness Golf Course, Island of Hoy, Mainland Orkney

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Scottish golf tourism will enjoy a significantly enhanced global profile between 2014 and 2020. The plan is to stimulate growth and success for the future of the industry