

THE FUTURE OF SCOTTISH GOLF

A VISION AND FRAMEWORK FOR SUCCESS

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OVERVIEW

Scotland is recognised world wide as 'The Home of Golf'. As such, golf, with 550+ courses across Scotland, is in itself a considerable industry which is a major contributor to the Scottish economy:

- through the millions of rounds that are played each year, and those that venture to play them from home and tourists from abroad;
- the world class tournaments that are held each year that showcase Scotland throughout the world via the media, and the hundreds of thousands of spectators that come out to watch the world's best players;
- the golf clubs, hospitality and wider golf industry as businesses and employers that support the golf industry the length and breadth of this nation; and
- through the contribution to the health and wellbeing of a nation where approximately 10% of the population regularly play golf.

Golf is more than just an industry however. It is a key pillar of Scotland's international profile as well as a defining factor in the quality of life and culture for many Scots.

Many successful initiatives already exist to support and develop golf in Scotland both as a sport and as a business. However, in order for Scotland to retain and develop its pre-eminence, it is crucial that work undertaken to coordinate more closely all the various aspects of golf development under a single framework. This maximises the opportunity for real growth and progress in the future. Our aspiration is to create a comprehensive and coordinated framework for golf in Scotland, capitalising on the existing work that is being carried out, and building upon the strength of Scotland's golf product. Our desired outcome is to ensure a maximum contribution to the Scottish economy, create opportunities for involvement of Scottish people in a sport which is culturally significant, offer opportunities for Scots to perform at the elite level on the World Stage, and to create a strong product which delivers for everyone involved and underpins the positioning of Scotland – The Home of Golf.

The resulting strategy is and will always be work in progress. The detail of the strategy will be constantly reviewed and revised as market conditions change and new information comes to hand.

FIRST STEPS

In late 2007 a group representing the various strands within the golf industry in Scotland was established in order to take the first steps towards the creation of a coordinated Golf Framework. This Framework Group represented both the private and public sectors and met three times to discuss our common ambition and agree the optimal way forward.

The bid for, and ultimately hosting of, the 2014 Ryder Cup has acted as the catalyst for change, delivering opportunities to build on existing strengths and initiatives, with the ambition of achieving prosperity for all involved beyond 2014.

The following high level objectives were identified as those which would initially be the focus and drivers behind this Golf Framework:

- To develop a coordinated approach to maximise the potential of golf in Scotland as a major and sustainable contributor to the Scottish economy;
- To align existing initiatives and identify new innovative approaches which further develop the potential of golf in Scotland;
- To coordinate investment in golf development, demonstrate value for money, and a tangible return on public investment; and
- To ensure that Scotland's golf events remain world-class, and that Scotland delivers the best ever Ryder Cup in 2014.

Concurrently a piece of work was being undertaken by the governing bodies for the sport in Scotland; the Scottish Golf Union (SGU) and the Scottish Ladies Golfing Association (SLGA) together with the Professional Golfers Association (PGA). This work, described as 'One Plan for Golf', was an attempt to align the aims, objectives and strategies of all organisations involved in developing the sport of golf and built on the success of the Clubgolf initiative, which itself is a key aspect of the 2014 Ryder Cup legacy. The work conducted by these bodies on 'One Plan for Golf' feeds naturally into this wider framework and the two processes are now brought together under the Golf Framework.

The resulting vision, mission and framework for action illustrated in this document represent the collective input from all these different elements.

It is important to note that significant work in many of the areas outlined in the Framework has been undertaken and much progress has been made. Much of this is related to closer working between organisations involved in establishing the Framework and will now be built upon as we seek to fully implement the agreed actions.

CREATING A VIBRANT FUTURE

THE VISION

The Framework Group set out to create a vision for the future of Scottish golf that would show real ambition, create a lasting legacy, leverage off the Ryder Cup and other significant golf events through to 2014 and beyond, and deliver major economic benefits to the nation.

We sought to build on our heritage as the home of golf but to make it clear that the future of golf also lies in Scotland. We wanted to devise a vision statement that would unify all parts of the game whether sporting or commercial – a vision that would excite, challenge and motivate all of those involved.

The resulting vision is:

By 2020, Scotland will be the world leading golfing nation.

Ultimately, success will be measured in both tangible and intangible terms. Success must be measured relative to the size of Scotland. For example, Scotland with a population of circa 5m, will never boast of having the most players in the world – but it may have the most players per head of population.

In 2020 success against the vision will be determined by Scotland:

Having the highest number of people playing golf per head of population in the world;

Having the most comprehensive player pathway to develop golfers from entry to elite levels in the world;

Having a minimum of two Scots in the 2013 European Solheim Cup team and 2014 European Ryder Cup Team, seven Scots in the top 100 in the world in men's and women's amateur and professional golf;

Growing the value of golf to Scotland by 25% from the 2008 level as established in benchmarking research;

Maintaining the place of golf in the fabric of Scottish society with the game being accessible to all; and

Maintaining Scotland's iconic status for world renowned and sustainably managed golf courses.

This is a big ambition. It demands that Scotland be world-class in every aspect of golf – good enough to be regarded as competitive with every other golfing nation. It will require excellence in everything to do with the game, from amateurs to professionals, from facilities to service standards, from green-keepers to club managers to coaches. One could argue that in many areas this has already been achieved. However, maintaining a leading position also requires considerable work and effort and this vision commits us to both developing and maintaining a world leading position. Ultimately, if we get close to achieving the collective measures then we will have succeeded.

To help us get there, we need clear goals – our mission.

THE MISSION

There are six key performance areas which are the likely drivers of success. We have attempted to allocate quantified objectives to each. However, for some, the baseline measurements are lacking at present and it is part of our strategy to put those in place at an early stage.

In the context of this document 'we' represents all parties involved in Scottish golf as reflected in the membership of the Framework Group.

The drivers and our objectives are:

1. Participation – Growing the Game

A lively and growing golf scene is fundamental to our efforts. Widespread participation benefits every aspect of the game and its related commercial interests. We are fortunate in that golf is embedded within Scottish culture, yet participation is not growing as we might wish.

Currently, 257,000 people are members of golf clubs in Scotland with a further 250,000 estimated to regularly play on a pay and play basis. Of the 257,000 members, 76% are adult male, 13% adult female, 10% junior male and 1% junior female.

We aim to increase overall golf club membership by 10% and the number of female members by 15% by 2020.

2. Clubs and Facilities – Supporting Clubs

Our facilities related to golf, and the quality of service delivered by them, will need to be exemplary. Visitors must perceive their Scottish golf experience to be of the highest quality if we are to meet our targets.

There has been and will continue to be a significant culture shift within the majority of clubs, improving both access and the visitors' welcome. We will provide training and education across all aspects of managing golf facilities and aim to achieve world class IT facilities and services within clubs. We will build on the development of SGU Golf Central with a central database of golfers and link to tee time booking.

These actions integrate closely with the work in section five on Golf Tourism to develop and support both clubs and all businesses involved in golf.

We will support the development of new and improved facilities for the development of players at all levels. Success will be determined by the player pathway being supported with appropriate facilities by 2020.

3. Winners – Developing Talent

To succeed at the highest levels, any sport needs a constant flow of talent. We aim to ensure that Scotland outperforms in this respect through the provision of a world class player and coach pathway to develop talent that is world leading. Ultimately our objective is to have:

- Two players in the Ryder Cup team for 2014/Solheim Cup team for 2013
- 7 players in the world Top 100 by 2020
- 4 players in the Top 50 by 2020
- 1 player in the Top 10 by 2020
- To win the World Amateur Team Championships at least once by 2020
- To have 7 players in the World Top 100 amateur golfers by 2020

And we aim to achieve the above in both men's and women's golf.

4. Events

We will continue to showcase Scotland by winning significant golfing events and ensuring world class delivery.

Specifically, we will:

- Deliver the best ever Ryder Cup in 2014.
- Deliver world class events at every level.
- Attract events that collectively generate revenue in their own right and thereby contribute to the value of golf to Scotland.
- Attract or create events that support the vision and objectives of the Framework.
- Maximise the legacy and development opportunity to golf that such events can provide.

5. Golf Tourism

We already have a challenging government target of increasing golf tourism by 50% by 2012. Our aim is to achieve and maintain the golf tourism growth above that of general tourism in the period to 2020. Whether this is achievable or not is unknown. This requires a plausible baseline value for golf tourism to be established as a first action and as part of a wider piece of work to establish the value of the golf industry to Scotland (see Point 6 below).

Initial areas to be developed are:

- Develop brief for industry-wide research on the value of golf to Scotland, including but not exclusively, the value of golf tourism
- Co-ordinate and maximise the value of marketing Scotland as the Home of Golf
- Co-ordinate and maximise the value of attending various golf exhibitions and shows annually
- Co-ordinate and maximise the value of the annual international events programme
- Co-ordinate annual training and development for golf clubs and golf related industry e.g. hotels
- Develop a meaningful and consistent measure of customer satisfaction when golfing in Scotland

Collective work in these areas has already begun.

6. Industry, R&D & Working Together

In order to achieve our objectives we need to engage with the golf industry and suppliers in delivering the Framework. In turn the success of the Framework will produce benefits for the industry.

Our first objective is to establish the value of golf to Scotland (as at 2008) and thereafter set a target to grow this value by 2020.

THE BENEFITS

As a result of the lack of some baseline measurements, it is difficult to be precise at this stage. However, we anticipate that meeting the objectives set would grow the value of golf to the Scottish economy by 25%. The value would arise from a number of sources:

- a. Establish the value of Golf in Scotland**
- b. Golf tourism income grows (and is maintained) by 25%**
- c. The economic value of the golf industry to Scotland grows by 25%**
- d. Golf Clubs collectively increase membership and turnover, becoming stronger and more sustainable.**
- e. Greater visible success will attract more or retain major events**
- f. A significant section of the population will be healthier, contributing to increasing quality of life and reducing health costs**
- g. The social nature of the game will have penetrated even further into the population giving societal benefits**
- h. We will have built from the existing strong foundations a sustainable, leading-edge, world-class golf industry.**
- i. More players in the system with better structures, facilities and coaches will lead to greater success, which in turn will drive the other benefits.**
- j. We will maintain and grow Scotland's position in providing golfing expertise around the world in coaching, greenkeeping, golf course architecture and tournament management.**

THE FRAMEWORK

There is a great deal of good work already being done in the golf world. We have taken all of this into account in developing the strategic view that follows. The approaches we are or intend to follow complement and build on what is being done.

Our start point must be to establish trusted baselines. We will therefore invest in carrying out and/or assembling appropriate research to give us agreed measures for each area of activity. However, in the interim period we have continued and will continue to take action in areas we recognise as providing quick and sustainable results in achieving our ambitions.

In the Framework workshops, we devised a strategy for each of the six key performance areas covered earlier. These are supported by detailed plans for each of the relevant five areas. From these detailed plans, annual plans for action in each area will be agreed and implemented according to available resource. These have been and will be constantly reviewed in response to the changing environment and requirements.

1. Participation

Our objective is to increase the number of people playing golf and within that, the number committing to club membership.

The Growing the Game element of 'One Plan for Golf' provides a base from which work in this area can start.

- Clubgolf is a powerful initiative to give youngsters the opportunity to both try the game and develop their skills to their chosen level. We will support and develop the clubgolf strategy in support of our mission.
- We will target increasing Adult Participation with particular emphasis on female participation.
- We will engage with non-member golfers, recognising their importance to golf in Scotland. We will communicate with them and better understand their needs.
- Our main focus will be golf clubs themselves and we will work with them to make access to young players and families easier, whilst benefiting the club at the same time – *'Clubgolf for families'*
- We will ensure that the principles of equity are integral to our plans and promoted at every opportunity.

- We will engage with the health sector to promote golf as a healthy sport, for all of the family, from childhood to old age.
- We will provide excellent opportunities for coaches, volunteer and professional, to continuously improve their skills and knowledge.

2. Clubs and Facilities

Golf clubs are the key point of leverage. Playing the game must be a pleasure – in all aspects – if we are to attract and retain more players and more visitors. We must support our clubs to be the world’s best in order to fulfil our vision.

- We will facilitate the development of world-class training and development courses for every aspect of running a club successfully. Aspects will include:
 - Club management structure and governance
 - Club management and administration
 - Course development and maintenance, including environmental matters
 - Tourism and hospitality
 - Coaching
- We aim to have over 350 clubs fully enabled for the electronic age – and competent in exploiting technology to their advantage
- As a start to the above, we will develop and promote SGU Golf Central, including linking a central database of handicaps and members as well as on-line booking facilities, assisting clubs to use this technology to promote and grow their business as desired
- We will develop best-practice models for all aspects of club management
- We will continue to provide excellent leadership in providing handicapping and course rating systems
- We will devise a practical tool for the measurement of both customer and member satisfaction and encourage clubs to utilise these tools
- We will create a ‘Club of the Year’ competition with substantial incentives for superb performance.

- In essence, we are setting out to make a major change in the prevailing culture of many clubs, to make them more customer-focused and welcoming towards all players.
- We will develop a facilities strategy, setting out how we will offer advice and funding to develop world class facilities for all in support of our mission.

3. Winners

Our objective is to have a significant number of world-class Scottish golfers flowing through the system.

The 'Pathways' strategy is an excellent base from which to start. 'Pathways' provides the means to develop a player through amateur golf and into their professional career. However, there is a gap in how players will be supported through the particularly difficult first few years when he or she struggles to become established as a professional. We will address this by:

- Providing the resource and a funding mechanism to help new professionals over the first two to three years. Those who succeed may be asked to pay back the support received. We need to develop a viable proposal for this area and gain support for the same
- Using our events success to give Scottish young professionals the opportunity as far as possible to play in important championships
- Publicising our 'heroes' and promoting them as role models – including both young professionals and those already established – or even retired
- Using young professionals as ambassadors in promoting Clubgolf and working to help develop future golfing talent. Continuing to invest in coaching systems and player support at entry and development (amateur golf) levels to ensure success in amateur golf as a precursor to developing the future successful professional golfers
- Winners, however, will not only be seen on the course itself. Similar development of other areas critical to the success of Scottish golf such as green-keeping, volunteering and management, are addressed under other objectives.

4. Events

We will create, attract and facilitate a range of events in support of the vision. In doing so we will ensure golf events support the target of 25% growth in the contribution of Scottish Golf to the Scottish economy and that there are sufficient

and appropriate events to support the delivery of the participation, golf tourism and winners goals.

Specifically, we will:

- Deliver in 2014 the finest Ryder Cup event in the history of the competition
- Continue to attract at least two significant championships a year to Scotland
- Ensure that in attracting events to Scotland, we maximise the legacy and development opportunity available
- Deliver outstanding events at every level of the game in Scotland
- Facilitate industry, club and educational forums and seminars that directly address our objectives
- Use events as a core communication opportunity to spread our message
- Seek cross-over opportunities where golf might logically be included in other events
- Through golf events contribute to the target of growing the value of golf to Scotland by 25%

5. Golf Tourism

Increasing our golf tourist income is a critical, central element of our vision. To deliver this we must enhance the proposition that, for any golfer in the world, Scotland is the one place you simply must play (at least once) in your lifetime. But the experience, as stated earlier, must support the proposition. To that end, we will:

- Develop a world-leading understanding of our customers and prospects – both in established golf playing markets and in those which are now emerging
- Match the above with a similar in-depth knowledge of current and emerging competitor destinations
- Identify and share best practice – for example, amongst B&Bs, clubs and tour operators
- Develop a robust feedback mechanism so we can monitor the visitor experience as a basis for improving performance

- Develop and coordinate the marketing of Scotland as the Home of Golf between all parties involved in the golf visitor's experience
- Work initially with those golf clubs and golf related businesses keen to be involved – and seek to engage with others in time
- Develop programmes to encourage both repeat visits and referrals by enhancing the visitor experience
- Support clubs to develop and manage their product through use of technology and innovation

6. Industry, R&D & Working Together

In order to achieve the objectives in the Framework, we need to engage with the golf industry based in Scotland and outside of Scotland. This needs to be considered on a case by case basis – both in terms of companies engaged with and in relation to what aspect of the Framework the Companies are targeted for. Initially there are two areas of work:

1. Establish the value of golf to Scotland; and
2. Explore the opportunities to grow this value, many of which are inherent in the achievement of the Framework objectives of growing golf tourism, participation and membership.

Working together against this Framework is also critical if we are to achieve our ambition of maximising the contribution of golf to Scotland. The delivery team is essential to achieving this ambition.

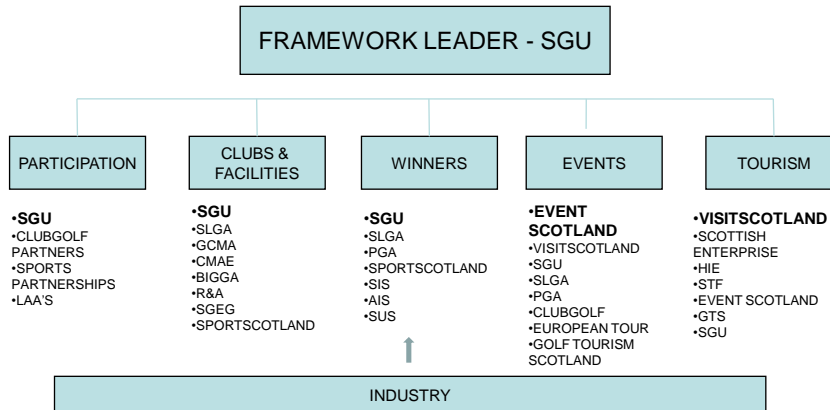
BUILDING THE DELIVERY TEAM

The Framework Group was very clear in one core view: there are already too many different bodies in golf and we have no wish to create yet another new organisation. We'd rather see amalgamation than augmentation. We propose, therefore, to use the strongest and most appropriate of the existing organisations as the delivery vehicles for this ambitious vision.

We do feel, however, that there is the need for a lead organisation with the role of leading, driving and motivating all parties to ensure the vision is delivered. There is consensus that the Scottish Golf Union Ltd (SGU) is the body best placed to adopt this role.

Reporting to this leader (as far as the Framework project is concerned) will be lead individuals/bodies for each key performance area. We envisage these

individuals coming from bodies which have the relevant capabilities to deliver the results in each area. Consequently, we see the structure as shown in the diagram below.



Note: Lead organisation in each key area identified in **bold type**

Glossary:
 SLGA – Scottish Ladies’ Golfing Association
 PGA – Professional Golfers’ Association
 CLUBGOLF – junior golf partnership comprising SGU/SLGA/PGA/ Sportscotland and Golf Foundation
 LAA – Local Authority Areas
 GCMA –Golf Club Managers’ Association
 CMAE – Club Managers’ Association of Europe
 BIGGA – British & International Golf Greenkeepers Association
 R&A – The R&A
 SIS – Scottish Institute of Sport
 AIS – Area Institutes of Sport
 SGEG – Scottish Golf Environment Group
 SUS – Scottish Universities Sport
 GTS – Golf Tourism Scotland

Specific groups will meet in each key area as required. The leads from each key area will meet quarterly, to monitor progress against the strategy and ensure the necessary co-ordination is in place between all parties. The bigger overview group – which has contributed so much in starting this initiative – would meet annually to review progress and the strategy in general.