Sheffield Hallam University | Sport Industry Research Centre

GLENEAGLES SCOTLAND 2014

ECONOMIC IMPACT & BENEFITS' STUDY

FINAL REPORT

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1. INTRODUCTION

The Ryder Cup biennial golf competition between teams from Europe and the United States is jointly administered by the PGA of America and Ryder Cup Europe LLP, and the event alternates between courses in the United States and Europe. Ryder Cup Europe LLP commissioned the Sport Industry Research Centre (SIRC) from Sheffield Hallam University to undertake an evaluation of The 2014 Ryder Cup, staged at The Gleneagles Resort in Auchterarder, Perthshire in Scotland from Monday 22nd to Sunday 28th September 2014. The 40 th edition of this iconic event was the first time it had been held in Scotland since 1973 and there was great anticipation as this pure sporting contest returned to *The Home of Golf*.

Ryder Cup Europe delivered the event in partnership with the Scottish Government, VisitScotland and EventScotland given that Scotland was the host country and Gleneagles Resort the host venue. Other key delivery partners were Transport Scotland, Perth & Kinross Council and the Police Service of Scotland. Ultimately in 2014 the European Ryder Cup Team retained the trophy they had won in Medinah (in 2012) by a score of 16½ to 11½; its third successive victory and eighth in the last ten editions of the event. This report details the extensive research undertaken around the event.

1.1. Research Aims

The Ryder Cup was a highlight of the UK sporting calendar in 2014 and was expected to attract thousands of spectators from home and abroad, whose expenditure would boost the local and national economies. The principal aim of the evaluation was to measure the economic impact of the event at three different levels of geography using the *eventIMPACTS* recommended methodology[1]. The specific geographic locations under consideration were: Perth & Kinross; Scotland; and the UK.

The research also considered the following:

- The overall economic activity in Scotland (including Perth & Kinross).
- The value of Ryder Cup contracts awarded to Scottish businesses.
- Perceptions of accommodation providers, service sector businesses and golf clubs about the impact of the event.
- The impact on Gleneagles Resort and official Ryder Cup charities.
- The transport legacy of the event.
- Spectators' opinions of the event and perceptions about Scotland.
- Profile and perceptions of volunteers and the value of their time contribution at the event.

Furthermore, this report incorporates key findings from other research commissioned by Ryder Cup Europe and Scottish partners including:

- Information from the *YouGov Sporting Tracker* online GB Omnibus Survey and the Scottish Occupancy Survey.
- A summary of the media evaluation report produced by Repucom International.
- A report on the Green Drive environmental initiative around The Ryder Cup.
- Case studies around The Ryder Cup Education Programme.
- Ryder Cup influences on golf events in Scotland.

1 http://www.eventimpacts.com/economic/

1.2. Report Structure

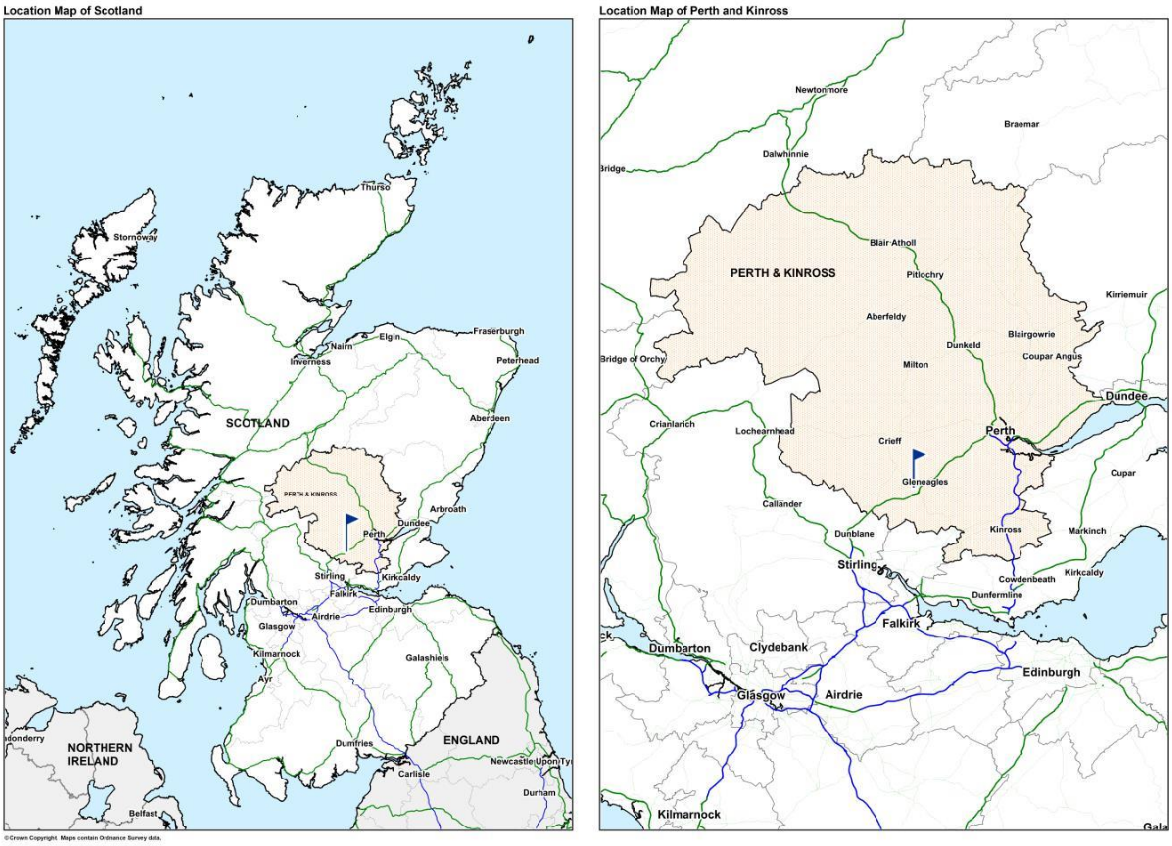
The rest of the report is structured as follows:

- Section 2 outlines the methodology employed including the data collection approaches and the sample sizes achieved.
- The demographic profile of spectators surveyed is presented in section 3.
- Section 4 presents the economic impact of the event at the agreed levels of geography, as well as the overall economic activity in Scotland supported by The Ryder Cup.
- Section 5 presents the findings from additional research undertaken by SIRC.
- The key findings from supplementary research conducted by other consultants are summarised in section 6.
- Concluding comments are presented in section 7.

2. APPROACH

A combination of methods was used to gather data from event attendees and organisers. Eight accredited researchers surveyed the key attendee groups at Gleneagles from 22nd - 28th September. Spectators were interviewed from Wednesday through Sunday, whilst other groups including media, volunteers and contractors were interviewed around the PGA Centenary Course (e.g. in the media centre, volunteer and contractor areas) from the 22nd onwards. The research team were deployed in different areas around the course (fairways, grandstands, close to corporate areas and in the tented village), in order to derive as representative a sample as possible amongst those watching. Some 2,000 spectator interviews were undertaken over the three competition days (Fri-Sun). A copy of the at - event spectator survey is presented in Appendix A. To help respondents to give valid answers about their expenditure in the three catchment areas (Perth & Kinross, rest of Scotland and the rest of the UK), maps of the surrounding area were provided for reference as shown in Figure 2.1.

Figure 2.1: Geography of the Scottish and Perth & Kinross economies



Post-event online surveys designed in conjunction with Ryder Cup Europe LLC, VisitScotland, EventScotland and Scottish Enterprise sought more detailed information (beyond economic impact) from spectators and volunteers. Such surveys were distributed the week after the event using information from ticket sales and volunteer databases. The online survey of spectators included a filter for anyone who had completed a face to face survey at the event in order to avoid any repetition of their expenditure responses.

A sample of contractors, licensees and event partners was contacted by telephone post-event to gauge their expenditure patterns. Furthermore, post-event online and telephone surveys were undertaken with golf clubs, accommodation providers and businesses in Scotland to try and understand any wider impacts on the service sector economy as a result of Gleneagles hosting The Ryder Cup. The sample achieved using the different methods is detailed in Table 2.1 and provides robust data upon which to base the economic impact estimates and other findings.

Table 2.1: Responses from key interest groups

Group	At Event	Online	Phone
Spectators	2,899	5,520	-
Media	382	-	-
Volunteers	220	572	-
Contractor personnel	208	-	28 companies
Licensees / Partners	-	-	26 companies
Businesses	-	30	33
Hotels, B&Bs, Guesthouses	-	35	45
Golf Clubs	-	72	-

In addition to the primary data collection summarised in Table 2.1, the research team reviewed event documentation (e.g. accreditation lists and ticket sales data), consulted extensively with Ryder Cup staff and analysed the event budget as part of the economic impact assessment. The steps involved in estimating the event's economic impact are fully compliant with the *eventIMPACTS.com* recommended methodology. The large spectator sub-sample achieved will provide invaluable information for future Ryder Cups in Europe and also to the Scottish partners who have invested significant amounts of time, effort and financial resources in delivering the event for Scotland.

3. SAMPLE PROFILE (SPECTATORS)

Figure 3.1 highlights some key demographic characteristics of the sample of spectators surveyed (8,419). Around 73% of respondents were male. The average age of the sample was 48.5 years. The vast majority described their ethnic origin as 'white' (98%), with 2% belonging to black and minority ethnic (BME) groups. Around 43% of respondents resided in Scotland and 78% resided somewhere in the UK.

A more detailed breakdown of the place of domicile of survey respondents is shown in Figure 3.2 and Appendix B. Slightly more than 4% of spectators resided in Perth & Kinross, with around one in five from the Edinburgh and Glasgow areas (19%) and almost 29% from England. The USA provided the bulk of spectators from overseas, although collectively European nations were well represented. A distribution of spectator responses from the UK is presented in Figure 3.3; whilst Figures 3.4 and 3.5 illustrate the spread in Europe and around the world.

Figure 3.1: Sample demographics

Figure 3.2: Spectators' place of domicile

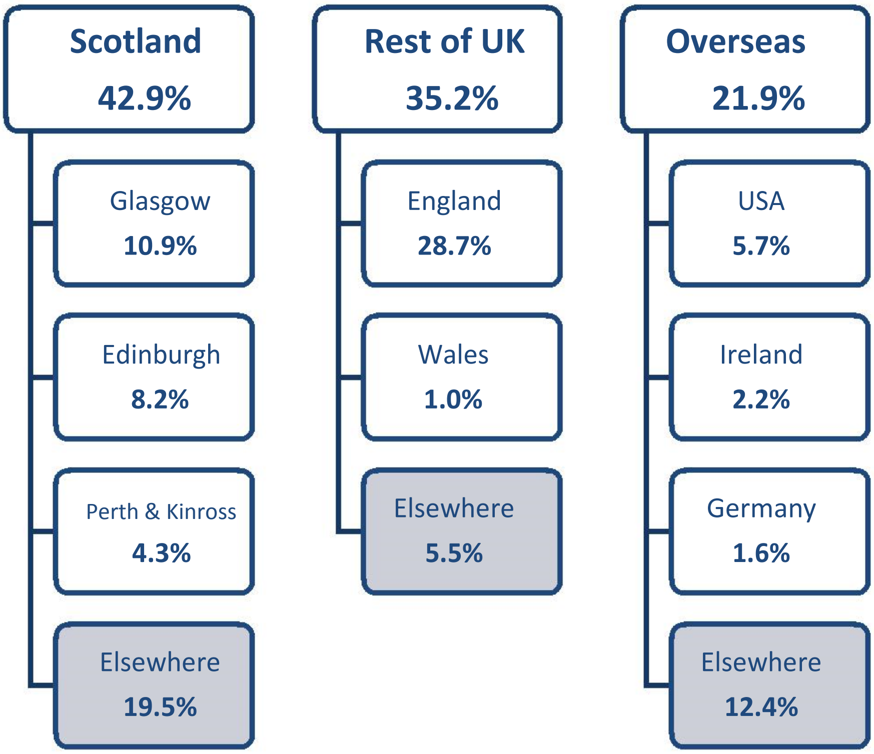


Figure 3.3: Distribution of responses by UK based spectators

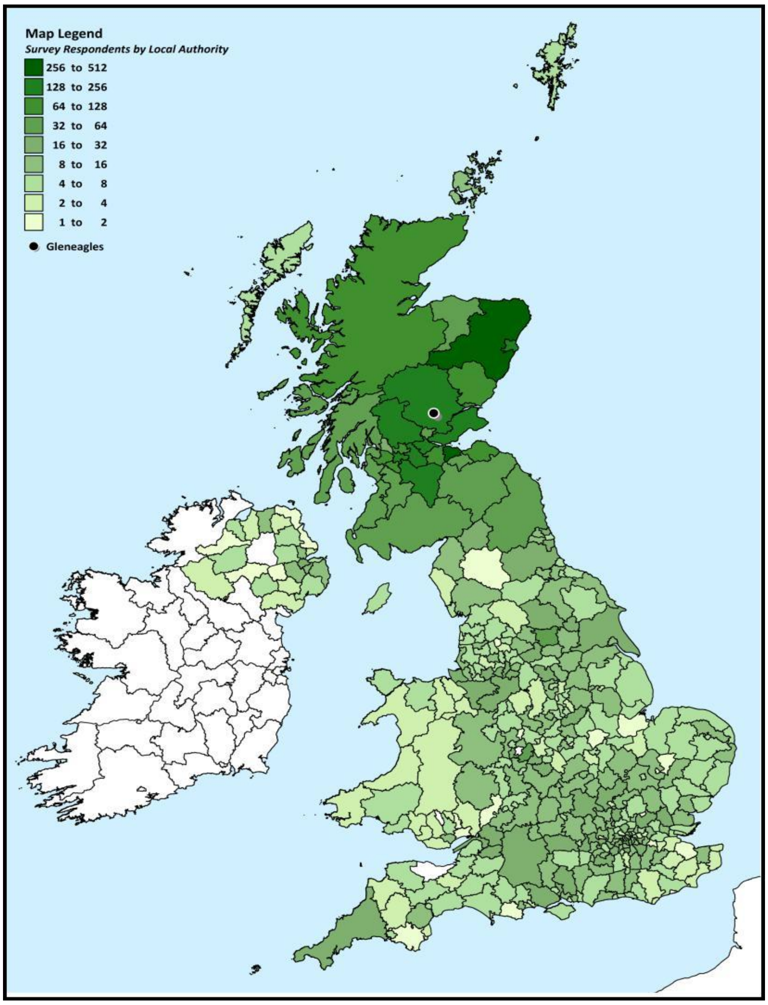


Figure 3.4: Distribution of responses by other (mainly) European based spectators

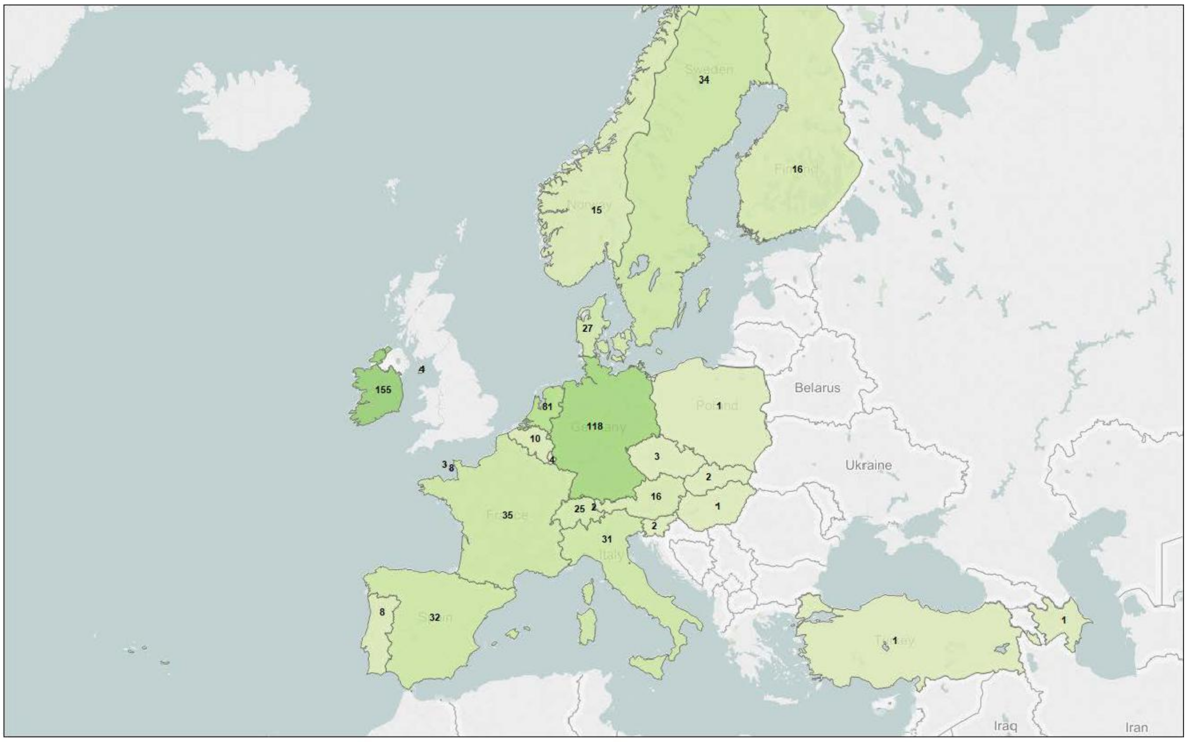
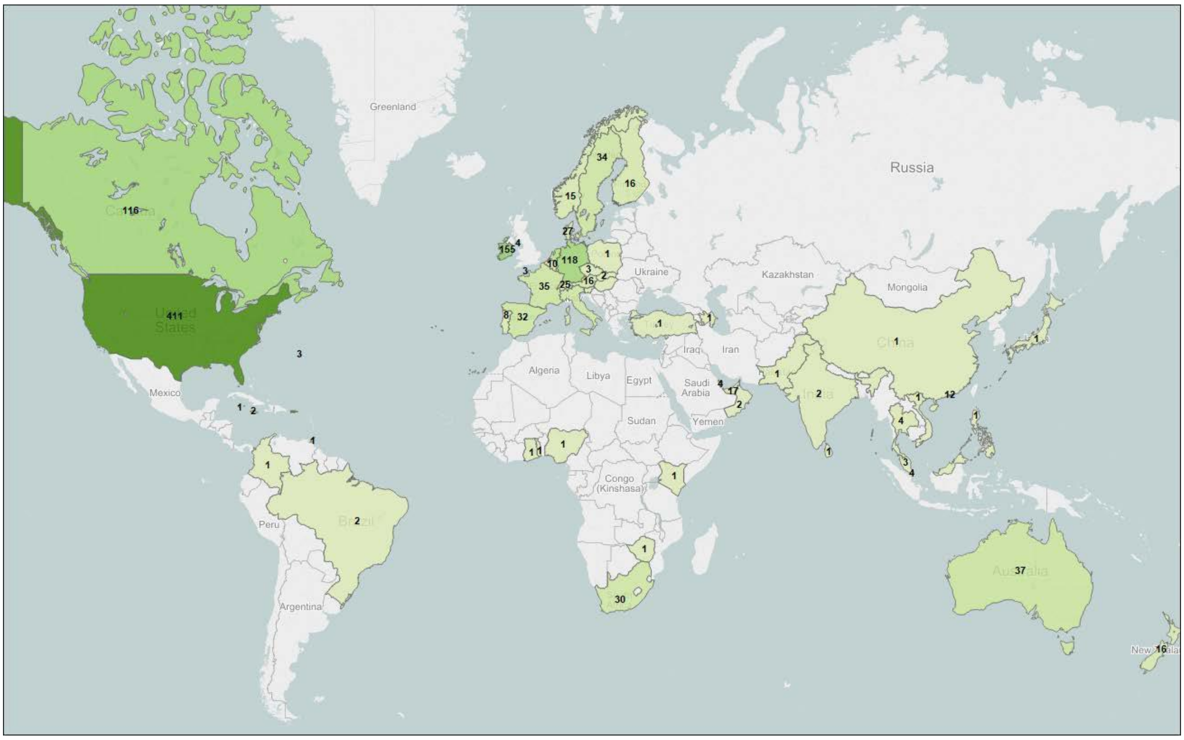


Figure 3.5: Distribution of responses around the World (excluding The UK)

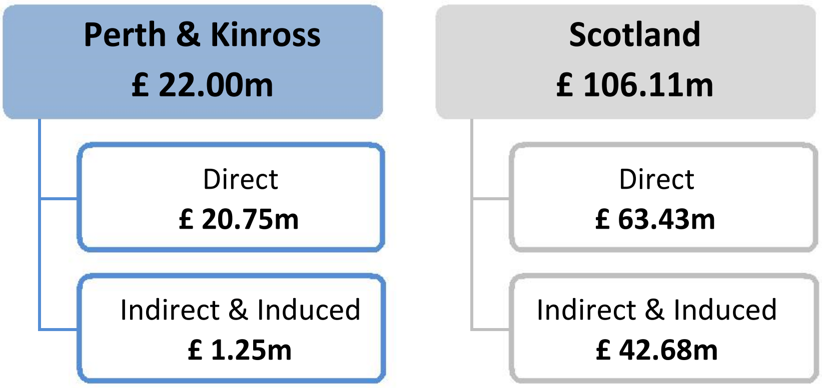


4. ECONOMIC IMPACT

4.1. Overview of Activity and Impact

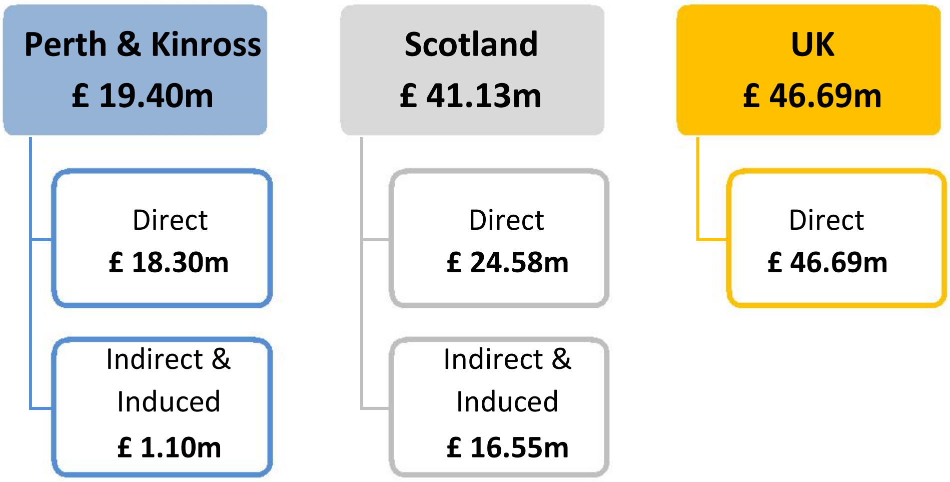
Prior to quantifying the economic impact of The 2014 Ryder Cup, the research first estimated that the total event related economic activity in Scotland by spectators and other attendees (regardless of where they reside), plus organisers (regardless of the source of funds), was **£63.4m**, which increased to **£106.1m** including indirect and induced effects. The event related economic activity in Perth & Kinross amounted to **£22m** as illustrated in Figure 4.1a. Thereafter in Figure 4.1b we present the economic impact breakdown at the three levels of geography (including the UK).

Figure 4.1a: Economic Activity in Scotland



The total economic impact of The 2014 Ryder Cup on Scotland is estimated at **£41.1m**. This is a subset of the economic activity referred to above and represents a combination of the event's direct economic impact (£24.6m) and subsequent indirect and induced effects (£16.6m). The corresponding estimate for Perth & Kinross is **£19.4m** (£18.3m direct plus £1.1m of indirect and induced effects). At UK level, the direct economic impact is estimated at **£46.7m** based on spending by event-specific visitors (from outside the UK) and the organisers.

Figure 4.1b: Economic Impact Overview



At the three levels of geography, the direct economic impact estimate excludes expenditure originating from within the defined host economy and by anyone who would ordinarily have been in the area on the day. In this context economic impact is defined as:

> *the net change in the host economy resulting from the visitor and organisational spending attributable to The 2014 Ryder Cup.*

The expression net change requires any negative impacts (e.g. at Scottish level, monies paid to non-Scottish contractors) to be offset against positive impacts (e.g. visitor spending in Scotland). Second, economic impact is concerned with spending attributable to The Ryder Cup. This means that for the additional spending by visitors to Scotland to count as economic impact directly attributable to the event; such visitors must have been in Scotland specifically to attend The Ryder Cup.

In accordance with the above definition, it is assumed that spending by attendees who were normally resident in the host economy (at the three levels: Perth & Kinross, Scotland or the UK), would have occurred anyway and was therefore considered to be *deadweight*. It is also assumed that expenditure by anyone who would ordinarily have been in the area on the day (e.g. for work) would have occurred regardless of The Ryder Cup and again could not be attributed to the event.

Table 4.1 summarises how spending by event attendees and organisers has been treated at each level of geography. The direct economic impact on Perth & Kinross includes the spending by event-specific visitors residing elsewhere in Scotland, the UK and overseas and by the organisers using monies originating from outside the Council area. At Scottish level, the impact is expressed as the direct expenditure by event-specific visitors residing outside Scotland (in the rest of the UK or overseas) and by the organisers using monies originating outside Scotland. Finally, the UK impact is expressed as the direct expenditure by event-specific visitors from overseas and by the organisers using monies originating outside the UK.

Table 4.1: Treatment of expenditure by attendees and organisers

Origin of spending	***Destination of expenditure (host economy)***		
	Perth & Kinross	Scotland	UK
Perth & Kinross	Excluded	Excluded	Excluded
Rest of Scotland	Included	Excluded	Excluded
Rest of UK	Included	Included	Excluded
Outside UK	Included	Included	Included

The total economic impact on Perth & Kinross and on Scotland (including indirect and induced effects) was estimated by multiplying the direct economic impact figure for each area by the relevant output multiplier derived by SIRC in consultation with economists working for The Scottish Government using the latest input/output tables. The economic impact findings are now presented on a group-by-group basis commencing with the expenditure by spectators.

4.2. Spectators

4.2.1. Overview

Figure 4.2 provides a snapshot of the estimated additional expenditure in Perth & Kinross, Scotland and the UK generated by non-local, event-specific, spectators. The derivation of these figures at each level of geography is explained in the subsequent sections (see 4.2.2 - 4.2.7).

Figure 4.2: Overview of additional expenditure by eligible spectators

4.2.2. Attendance

Our analysis of admissions data reveals that the aggregate attendance at Gleneagles over the week of The Ryder Cup was c. 250,000 which includes not only spectators (213,111 including corporate guests), but also volunteers, contractors and event staff. Analysis of survey data indicates that on average each spectator attended 1.9 days of the event, and therefore the total number of different spectators in attendance equates to almost 112,000. For each level of geography, this figure was adjusted based on survey data to exclude spectators normally resident in the host area under consideration ('locals') and visitors for whom the event was not the main reason for being present in the host economy ('casuals'). These adjustments enable us to estimate the number of spectators eligible for inclusion in the economic impact calculation for Perth & Kinross, Scotland and the UK, as shown in Table 4.2.

Table 4.2: Derivation of eligible spectator numbers for economic impact estimates

Ryder Cup week attendance (all groups)	250,000		
Spectator Admissions	213,111		
Average Days at The Ryder Cup	1.9		
Unique Spectators	111,761		
	Perth & Kinross	**Scotland**	**UK**
% Local Residents	4.3%	42.9%	78.1%
Visitors	**106,955**	**63,815**	**24,476**
% Casual Visitors (i.e. RC14 not main reason)	3.4%	3.5%	5.5%
Event Specific Visiting Spectators	**103,317**	**61,590**	**23,139**

The 103,317 spectators eligible for the economic impact estimate on Perth & Kinross resided outside the area and were visiting specifically to attend The Ryder Cup at Gleneagles. Similarly, more than 61,500 spectators from outside Scotland were visiting specifically because of The Ryder Cup; whilst the corresponding figure at UK level is more than 23,000 event specific visitors.

4.2.3. Eligible Spectator Type

In Table 4.3 we present the breakdown of spectator type by geography which informs the subsequent economic impact estimates during event week (22nd - 28th September) and for those spectators who were on an extended stay (pre or post event).

During Ryder Cup week, the majority (77%) of eligible spectators visiting Perth & Kinross (including those from elsewhere in Scotland) were day-visitors to the event, whereas for the economic impact at Scottish and UK level the most visits were by people making use of overnight accommodation, in particular commercial (paid) accommodation. Similarly for those spectators eligible for inclusion in the extended stay economic impact estimates, the majority made use of commercial accommodation at the three geographic levels.

Table 4.3: Ryder Cup event specific spectator characteristics

Ryder Cup Week (22 - 28 Sept.)	**Perth & Kinross**			**Scotland**			**UK**		
Event-specific visitors	**103,317**			**61,590**			**23,139**		
	%	Duration	Visits	%	Duration	Visits	%	Duration	Visits
Overnight commercial	16.5	3.4	58,418	64.5	3.4	133,104	62.8	4.3	62,783
Overnight non-commercial	6.5	3.4	22,744	19.2	3.7	43,768	20.4	4.6	21,812
Day visitors	76.9	1.8	140,760	16.3	2.2	21,808	16.8	1.5	5,805
OVERALL	100.0	2.1	221,922	100.0	3.2	198,681	100.0	3.9	90,399
Extended Stay (Pre 22 & Post 28 Sept.)	**Perth & Kinross**			**Scotland**			**UK**		
Number of people	**4,263** (4.2%)			**10,793** (17.5%)			**8,858** (38.3%)		
	%	Duration	Visits	%	Duration	Visits	%	Duration	Visits
Overnight commercial	3.2	4.5	14,593	13.6	5.4	45,316	28.9	5.8	38,660
Overnight non-commercial	1.0	4.8	4,843	3.9	5.2	12,443	9.3	6.0	13,010
OVERALL	4.2	4.6	19,436	17.5	5.4	57,758	38.3	5.8	51,671

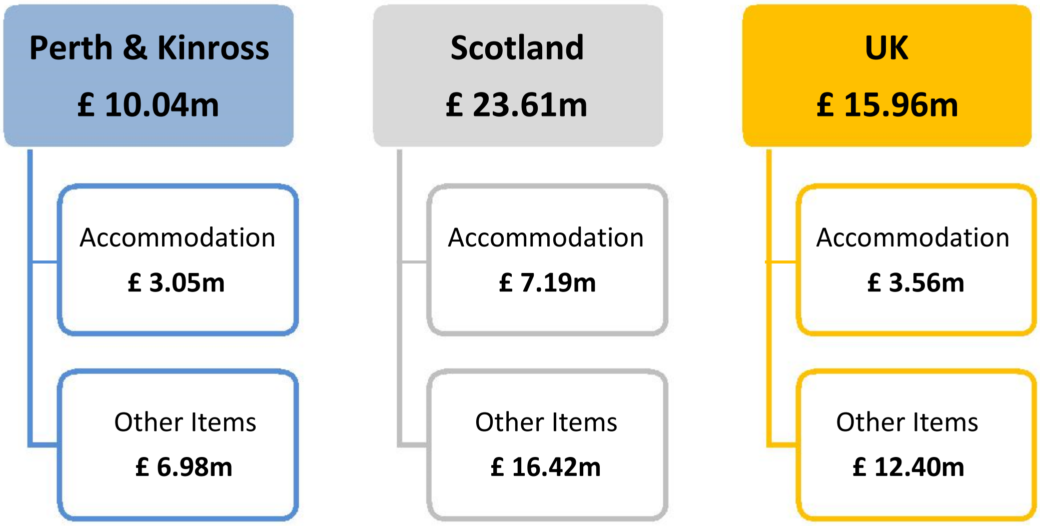
The estimates of the additional expenditure by eligible spectators at each level of geography are presented in the following order.

- Section 4.2.4 shows the expenditure by eligible spectators on accommodation and other items during Ryder Cup week only (22nd - 28th September).
- Section 4.2.5 shows the expenditure on accommodation and other items pre/post Ryder Cup week linked to extended stays by eligible spectators.
- The figures presented in sections 4.2.4 and 4.2.5 exclude: any golf-related spending by eligible spectators on green fees at all three levels of geography; and, at UK level, any other non-accommodation spending by eligible spectators from overseas in the rest of the UK (outside Scotland). These items of expenditure are considered in section 4.2.6.
- Finally, section 4.2.7 summarises the various figures from sections 4.2.4 - 4.2.6.

4.2.4. Spending by Eligible Spectators - Ryder Cup Week

A snapshot of the additional expenditure by eligible spectators during the event period is illustrated in Figure 4.3. The detail underpinning these headline figures for Perth & Kinross, Scotland and the UK are presented thereafter.

Figure 4.3: Overview of spending by eligible spectators during Ryder Cup week



Collectively, the spending by eligible spectators in Scotland during Ryder Cup week on accommodation (£7.2m) and other items (£16.4m) represents additional expenditure of **£23.6m**. The corresponding estimate for Perth & Kinross is c. **£10m** and for the UK is c. **£16m**.

Table 4.4 presents the expenditure of commercial stayers on accommodation during Ryder Cup week at each level of geography. Eligible spectators staying commercially in Scotland between 22nd and 28th September generated in excess of 133,000 bed-nights with hotels, B&Bs and other accommodation providers, which were estimated to be worth some £7.2m for the accommodation sector in Scotland. The corresponding estimates for Perth & Kinross and for the UK are **£3.1m** and **£3.6m** respectively.

Table 4.4: Accommodation spend by eligible spectators during Ryder Cup week

	Perth & Kinross	Scotland	UK
Commercial stayers	17,081	39,701	14,542
Avg. nights	3.4	3.4	4.3
Commercial bed nights	**58,418**	**133,104**	**62,783**
Avg. cost per person per night	£ 52	£ 54	£ 57
Accommodation spend	**£ 3,054,683**	**£ 7,188,471**	**£ 3,560,075**

Table 4.5 illustrates the expenditure by all eligible spectators, including both overnight stayers and day visitors during Ryder Cup week on items other than accommodation (e.g. food and drink, shopping, local travel etc.) and an itemised breakdown is shown in Table 4.6. On-site expenditure on 'programmes and merchandise' has been adjusted (discounted) in accordance with the proportion of vendors at Gleneagles from each level of geography.

Table 4.5: Non-accommodation spend by eligible spectators during Ryder Cup week

	Perth & Kinross	Scotland	UK
Eligible spectators	**103,317**	**61,590**	**23,139**
Avg. days / nights	2.1	3.2	3.9
Total visitor days / nights	**221,922**	**198,681**	**90,399**
Avg. daily spend per person	£ 31	£ 83	£ 137
Non-accommodation spend	**£ 6,984,269**	**£ 16,418,794**	**£ 12,396,153**

The additional expenditure by eligible spectators in Scotland on the non-accommodation items (excluding green fees) amounted to **£ 16.4m**, while Perth & Kinross and the UK had an injection of c. **£7m** and **£12.4m** respectively. At UK level, the non-accommodation expenditure by eligible spectators from overseas only includes their expenditure in Scotland - any other spending by them in the rest of the UK is captured separately (see section 4.2.6).

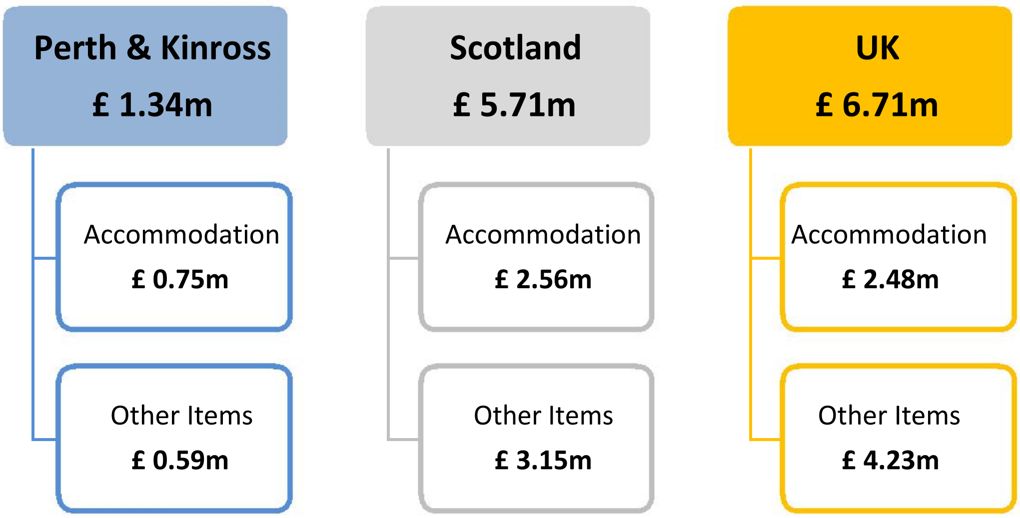
Table 4.6: Itemised breakdown of non-accommodation spend during Ryder Cup week

Category	Perth & Kinross	Scotland	UK
Food and drink	£ 3,922,822	£ 9,049,970	£ 5,196,447
Programmes / merchandise	£ -	£ 1,003,430	£ 1,319,142
Shopping	£ 1,398,511	£ 2,278,902	£ 2,165,118
Entertainment	£ 72,773	£ 548,989	£ 680,894
Local travel	£ 1,238,407	£ 3,138,966	£ 2,797,600
Other	£ 351,756	£ 398,538	£ 236,952
Total	**£ 6,984,269**	**£ 16,418,794**	**£ 12,396,153**

4.2.5. Spending by Eligible Spectators - Extended Stays

A snapshot of the additional expenditure linked to extended stays by eligible spectators pre/post Ryder Cup week is illustrated in Figure 4.4. The detail underpinning the headline figures for Perth & Kinross, Scotland and the UK are presented thereafter.

Figure 4.4: Overview of spending by eligible spectators pre/post Ryder Cup week



For each level of geography, Table 4.7 presents the expenditure by eligible spectators who made use of commercial accommodation in the lead up to and/or following Ryder Cup week.

Table 4.7: Accommodation spend by eligible spectators pre/post Ryder Cup week

	Perth & Kinross	Scotland	UK
Commercial stayers	3,262	8,377	6,698
Avg. nights	4.5	5.4	5.8
Commercial bed nights	**14,593**	**45,316**	**38,660**
Avg. cost per person per night	£ 51	£ 56	£ 64
Accommodation spend	**£ 750,853**	**£ 2,558,021**	**£ 2,479,564**

Table 4.8 illustrates the expenditure on items other than accommodation by all eligible spectators including both overnight commercial stayers and non-commercial stayers pre 22nd September or post 28th September. An itemised breakdown of this spending is shown in Table 4.9. The non-accommodation expenditure by eligible spectators from overseas only includes their expenditure in Scotland - any other spending by them in the rest of the UK is captured separately (see section 4.2.6).

Table 4.8: Non-accommodation spend by eligible spectators pre/post Ryder Cup week

	Perth & Kinross	Scotland	UK
Eligible spectators	4,263	10,793	8,858
Avg. days / nights	4.6	5.4	5.8
Total visitor days / nights	19,436	57,758	51,671
Avg. daily spend per person	£ 30	£ 55	£ 82
Non-accommodation spend	**£ 587,523**	**£ 3,152,449**	**£ 4,234,447**

Table 4.9: Itemised breakdown of non-accommodation spend pre/post Ryder Cup week

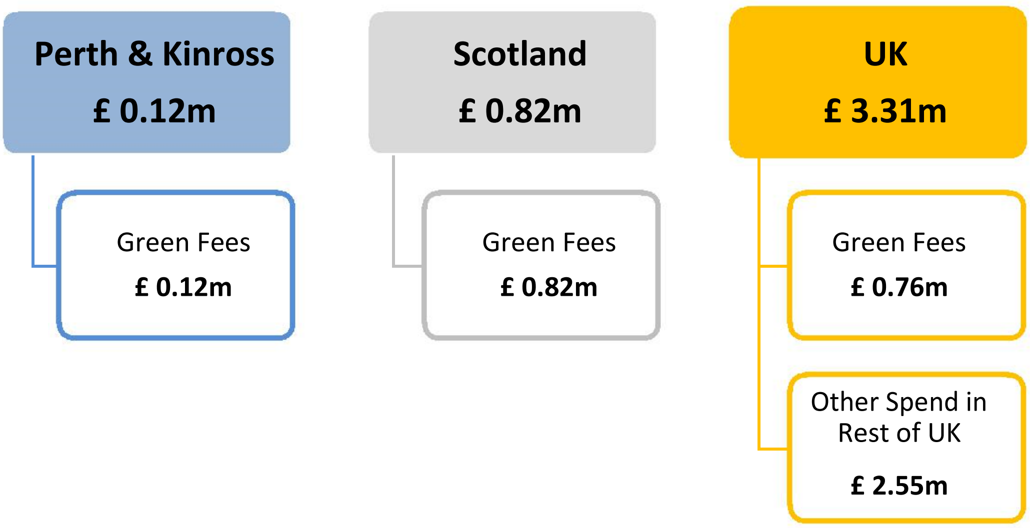
Category	Perth & Kinross	Scotland	UK
Food and drink	£ 307,248	£ 1,665,616	£ 1,561,748
Shopping	£ 133,185	£ 492,324	£ 1,348,866
Entertainment	£ 40,728	£ 277,882	£ 319,971
Local travel	£ 97,494	£ 671,303	£ 959,896
Other	£ 8,868	£ 45,324	£ 43,967
Total	**£ 587,523**	**£ 3,152,449**	**£ 4,234,447**

Some **£5.7m** was spent by eligible spectators as part of their extended stay in Scotland pre/post Ryder Cup week on accommodation (£2.6m) and other items (£3.1m excluding green fees), with Perth & Kinross and the UK benefiting from **£1.3m** and **£6.6m** respectively in the same time frame.

4.2.6. Spending by Eligible Spectators - Green Fees and Other UK Spend

As noted previously in section 4.2.3, the additional expenditure estimates presented in sections 4.2.4 and 4.2.5 exclude: any golf-related spending by eligible spectators on green fees at all three levels of geography; and, at UK level, any other non-accommodation spending by eligible spectators from overseas in the rest of the UK (outside Scotland). The estimated expenditure by eligible spectators on these items based on analysis of survey data is shown in Figure 4.5.

Figure 4.5: Expenditure by eligible spectators on green fees and other UK spend by overseas visitors



The golf-related expenditure estimates in Figure 4.5 are derived by multiplying the numbers of eligible spectators at each level of geography by the average trip spend per person on green fees in these locations. For example, at Scottish level, there were some 61,590 event-specific visitors and the average trip spend on green fees in Scotland was around £13 per person. The estimate for 'other spend in the rest of the UK' (£2.6m) is derived by multiplying the event-specific visitors from overseas (23,139) by the average trip spend per person in the UK excluding Scotland (£110); their local expenditure and in the rest of Scotland has already been captured in sections 4.2.4 and 4.2.5.

4.2.7. Summary of Spending by Eligible Spectators

Bringing together the expenditure estimates from the previous sections (4.2.4 - 4.2.6), the total additional expenditure by eligible spectators is estimated at **£11.5m** in Perth & Kinross (see Table 4.10), **£30.1m** in Scotland (see Table 4.11) and c. **£26m** in the UK (see Table 4.12). Expenditure on green fees and in the rest of the UK by eligible spectators from overseas on other non-accommodation items is not shown within the 'event period' or 'extended stay' columns but is included in the 'total' column.

Table 4.10: Total additional expenditure by eligible spectators - Perth & Kinross

Category	Event Period	Extended Stay	Total
Accommodation	£ 3,054,683	£ 750,853	£ 3,805,536
Food and drink	£ 3,922,822	£ 307,248	£ 4,230,070
Programmes / merchandise	£ -	£ -	£ -
Shopping	£ 1,398,511	£ 133,185	£ 1,531,696
Entertainment	£ 72,773	£ 40,728	£ 113,500
Local travel	£ 1,238,407	£ 97,494	£ 1,335,901
Other	£ 351,756	£ 8,868	£ 360,625
Perth & Kinross Sub-Total	**£ 10,038,952**	**£ 1,338,376**	**£ 11,377,328**
Green fees			£ 124,692
Perth & Kinross Total			**£ 11,502,021**

Table 4.11: Total additional expenditure by eligible spectators - Scotland

Category	Event Period	Extended Stay	Total
Accommodation	£ 7,188,471	£ 2,558,021	£ 9,746,492
Food and drink	£ 9,049,970	£ 1,665,616	£ 10,715,586
Programmes / merchandise	£ 1,003,430	£ -	£ 1,003,430
Shopping	£ 2,278,902	£ 492,324	£ 2,771,226
Entertainment	£ 548,989	£ 277,882	£ 826,870
Local travel	£ 3,138,966	£ 671,303	£ 3,810,269
Other	£ 398,538	£ 45,324	£ 443,862
Scotland Sub-Total	**£ 23,607,265**	**£ 5,710,470**	**£ 29,317,735**
Green fees			£ 817,624
Scotland Total			**£ 30,135,359**

Table 4.12: Total additional expenditure by eligible spectators - UK

Category	Event Period	Extended Stay	Total
Accommodation	£ 3,560,075	£ 2,479,564	£ 6,039,639
Food and drink	£ 5,196,447	£ 1,561,748	£ 6,758,196
Programmes / merchandise	£ 1,319,142	£ -	£ 1,319,142
Shopping	£ 2,165,118	£ 1,348,866	£ 3,513,984
Entertainment	£ 680,894	£ 319,971	£ 1,000,864
Local travel	£ 2,797,600	£ 959,896	£ 3,757,496
Other Spend (in Scotland)	£ 236,952	£ 43,967	£ 280,919
UK Sub-Total	**£ 15,956,227**	**£ 6,714,011**	**£ 22,670,239**
Green fees			£ 760,687
Other spend (in rest of UK)			£ 2,552,111
UK Total			**£ 25,983,036**

4.3. Other Attendee Groups

This section details the estimated additional expenditure generated by non-spectator groups connected with the event (volunteers, media, contractors, partners/licensees, teams and event staff). For attendee groups other than spectators, it is assumed that The Ryder Cup was the main reason for their visit because they were integral to the event - hence all non-local attendees are considered to be event-specific visitors.

4.3.1. Volunteers

A snapshot of the spending by eligible volunteers at each level of geography is shown in Figure 4.6. The derivation of these headline figures is explained thereafter.

Figure 4.6: Overview of additional expenditure by eligible volunteers

According to information provided by Ryder Cup Europe, 2,050 individuals were selected to perform volunteer roles at the event. Based on primary data gathered from volunteers, we estimate that some 1,781 individuals resided outside Perth & Kinross, 699 resided outside Scotland and 148 were from outside the UK. As shown in Table 4.13, the majority of visitors to Scotland and the UK stayed in these locations beyond Ryder Cup week as they were required for the event planning and rigging.

Table 4.13: Derivation of eligible volunteers for economic impact estimates

	Perth & Kinross	Scotland	UK
Total Volunteers	2,050	2,050	2,050
% Local Residents	13.1%	65.9%	92.8%
Visitors	**1,781**	**699**	**148**
% Extended Stays (Pre 22 Sept. / Post 28 Sept.)	28.3%	77.4%	78.9%
Extended Stayers	**505**	**541**	**116**

For each level of geography, Table 4.14 presents a breakdown of the type of accommodation used by non-local volunteers (overnight commercial stayer, overnight non-commercial stayer or day visitor), their average trip duration and the total bed-nights / visitor days generated by them.

Table 4.14: Ryder Cup eligible volunteer characteristics

Ryder Cup Week (22-28 Sept.)		**Perth & Kinross**			**Scotland**			**UK**	
Event-specific visitors		**1,781**			**699**			**148**	
	%	Duration	Visits	%	Duration	Visits	%	Duration	Visits
Commercial	28.4	7.4	3,733	83.3	7.1	4,134	87.0	7.4	951
Non-commercial	7.9	6.6	936	16.7	7.3	850	13.0	5.3	102
Day visitors	63.6	6.5	7,356	0.0	n/a	n/a	0.0	n/a	n/a
OVERALL	**100.0**	**6.8**	**12,025**	**100.0**	**7.1**	**4,984**	**100.0**	**7.1**	**1,053**
Extended Stay (Pre 22 & Post 28 Sept.)		**Perth & Kinross**			**Scotland**			**UK**	
Number of people		**505**			**541**			**116**	
	%	Duration	Visits	%	Duration	Visits	%	Duration	Visits
Commercial	15.7	3.3	931	65.6	3.3	1,522	71.9	3.8	407
Non-commercial	2.3	5.8	239	11.9	5.7	471	7.0	8.2	85
Day visitors	10.3	1.4	258	0.0	n/a	n/a	0.0	n/a	n/a
OVERALL	**28.3**	**2.8**	**1,428**	**77.4**	**3.7**	**1,993**	**78.9**	**4.2**	**492**

It is worth noting that some of the 'extended stayers' in Perth & Kinross were in fact day visitors who commuted to the venue but did not stay overnight in the Council area pre or post event. At both Scottish and UK level, volunteers extending their stay primarily made use of commercial accommodation in these locations.

The expenditure patterns of eligible volunteers both during Ryder Cup week and for those who stayed (or visited) either before 22nd or after 28th September are shown in Figure 4.15. On-site expenditure on 'programmes and merchandise' has been adjusted (discounted) in accordance with the proportion of vendors at Gleneagles from each level of geography.

Table 4.15: Expenditure patterns of eligible volunteers

Category	**Perth & Kinross**		**Scotland**		**UK**	
	Event Period	**Extended Stay**	**Event Period**	**Extended Stay**	**Event Period**	**Extended Stay**
Average accommodation cost per person per night for eligible volunteers staying in commercial accommodation	£37	£39	£31	£30	£34	£41
Average daily non-accommodation spend per person across all eligible volunteers (exc. green fees)	£22	£18	£55	£28	£115	£65
Average trip spend per eligible volunteer on green fees	£5		£46		£30	
Average non-accommodation trip spend per eligible volunteer in the rest of the UK (outside Scotland)	n/a		n/a		£50	

A summary of the additional expenditure by non-local volunteers at the three levels of geography taking into consideration their average trip duration and expenditure patterns is presented overleaf in Table 4.16 (Perth & Kinross, **£0.48m**), Table 4.17 (Scotland, **£0.53m**) and Table 4.18 (UK, **£0.21m**).

Table 4.16: Total additional expenditure by eligible volunteers - Perth & Kinross

Category		Event Period		Extended Stay		Total
Accommodation	£	137,920	£	36,688	£	174,609
Food and drink	£	122,005	£	15,176	£	137,180
Programmes / merchandise	£	-	£	-	£	-
Shopping	£	78,772	£	6,817	£	85,589
Entertainment	£	2,355	£	811	£	3,166
Local travel	£	64,805	£	3,000	£	67,804
Other	£	234	£	155	£	389
Perth & Kinross Sub-Total	**£**	**406,090**	**£**	**62,646**	**£**	**468,736**
Green fees					£	8,704
Perth & Kinross Total					**£**	**477,440**

Table 4.17: Total additional expenditure by eligible volunteers - Scotland

Category		Event Period		Extended Stay		Total
Accommodation	£	126,200	£	45,862	£	172,062
Food and drink	£	104,588	£	28,747	£	133,335
Programmes / merchandise	£	27,439	£	-	£	27,439
Shopping	£	58,288	£	10,597	£	68,885
Entertainment	£	14,290	£	5,794	£	20,084
Local travel	£	65,778	£	10,835	£	76,613
Other	£	1,906	£	390	£	2,296
Scotland Sub-Total	**£**	**398,491**	**£**	**102,225**	**£**	**500,715**
Green fees					£	31,821
Scotland Total					**£**	**532,536**

Table 4.18: Total additional expenditure by eligible volunteers - UK

Category		Event Period		Extended Stay		Total
Accommodation	£	32,770	£	16,619	£	49,389
Food and drink	£	33,424	£	10,493	£	43,917
Programmes / merchandise	£	12,886	£	-	£	12,886
Shopping	£	24,551	£	6,863	£	31,413
Entertainment	£	4,083	£	3,378	£	7,460
Local travel	£	43,742	£	10,373	£	54,115
Other Spend (in Scotland)	£	2,104	£	936	£	3,040
UK Sub-Total	**£**	**153,560**	**£**	**48,661**	**£**	**202,221**
Green fees					£	4,376
Other spend (in rest of UK)					£	7,353
UK Total					**£**	**213,950**

4.3.2. Media

Figure 4.7 provides a snapshot of spending by eligible media personnel at each level of geography.

Figure 4.7: Overview of additional expenditure by eligible media personnel

Event records indicate that, 1,896 media personnel were in attendance at Gleneagles, of whom we estimate (according to survey responses) that 1,866 were eligible for inclusion in the economic impact estimate for Perth & Kinross by virtue of residing outside the Council area. Furthermore, 1,673 people resided outside Scotland and 715 were from outside the UK as shown in Table 4.19.

Table 4.19: Derivation of eligible media personnel for economic impact estimates

	Perth & Kinross	Scotland	UK
Total Volunteers	1,896	1,896	1,896
% Local Residents	1.6%	11.8%	62.3%
Visitors	**1,866**	**1,673**	**715**
% Extended Stays (Pre 22 Sept. / Post 28 Sept.)	22.1%	28.8%	38.9%
Extended Stayers	**412**	**481**	**278**

For each level of geography, Table 4.20 presents a breakdown of the accommodation used by non-local media personnel (commercial stayer, non-commercial stayer or day visitor), their average trip duration and the total number of bed-nights / visitor days generated by them. Some of the 'extended stayers' in Perth & Kinross were day visitors who commuted to the venue but did not stay overnight in the Council area pre or post event. At both Scottish and UK level, volunteers extending their stay primarily made use of commercial accommodation in these locations.

Table 4.20: Ryder Cup eligible media personnel characteristics

Ryder Cup Week (22-28 Sept.)	**Perth & Kinross**			**Scotland**			**UK**		
Event-specific visitors	1,866			1,673			715		
	%	Duration	Visits	%	Duration	Visits	%	Duration	Visits
Commercial	49.2	6.4	5,849	97.6	6.1	9,886	96.5	6.1	4,193
Non-commercial	1.3	5.3	131	2.4	4.3	171	3.5	4.2	104
Day visitors	49.5	6.1	5,673	0.0	n/a	n/a	0.0	n/a	n/a
OVERALL	**100.0**	**6.2**	**11,653**	**100.0**	**6.0**	**10,057**	**100.0**	**6.0**	**4,297**
Extended Stay (Pre 22 & Post 28 Sept.)	**Perth & Kinross**			**Scotland**			**UK**		
Number of people	412			481			278		
	%	Duration	Visits	%	Duration	Visits	%	Duration	Visits
Commercial	14.1	1.2	306	28.5	2.4	1,122	38.2	2.8	772
Non-commercial	0.0	n/a	n/a	0.3	3.0	15	0.7	3.0	15
Day visitors	8.3	1.4	203	0.0	n/a	n/a	0.0	n/a	n/a
OVERALL	**22.1**	**1.2**	**509**	**28.8**	**2.4**	**1,137**	**38.9**	**2.8**	**787**

The expenditure patterns of eligible media personnel both during Ryder Cup week and for those who stayed (or visited) either before 22nd or after 28th September are shown in Table 4.21. On-site expenditure on 'programmes and merchandise' has been adjusted (discounted) in accordance with the proportion of vendors at Gleneagles from each level of geography.

Table 4.21: Expenditure patterns of eligible media personnel

Category	Perth & Kinross		Scotland		UK	
	Event Period	Extended Stay	Event Period	Extended Stay	Event Period	Extended Stay
Average accommodation cost per person per night for eligible media staying in commercial accommodation	£167	£149	£143	£129	£143	£130
Average daily non-accommodation spend per person across all eligible media (exc. green fees)	£18	£20	£42	£43	£56	£44
Average trip spend per eligible media on green fees	£2		£11		£17	
Average non-accommodation trip spend per eligible media in the rest of the UK (outside Scotland)	n/a		n/a		£17	

The estimated spending by non-local media personnel at the three levels of geography taking into consideration their average trip duration and expenditure patterns is presented in Table 4.22 (Perth & Kinross, **£1.2m**), Table 4.23 (Scotland, **£2.1m**) and Table 4.24 (UK, c. **£1m**).

Table 4.22: Total additional expenditure by eligible media personnel - Perth & Kinross

Category	Event Period	Extended Stay	Total
Accommodation	£ 975,850	£ 45,659	£ 1,021,508
Food and drink	£ 154,514	£ 5,831	£ 160,346
Programmes / merchandise	£ -	£ -	£ -
Shopping	£ 1,625	£ -	£ 1,625
Entertainment	£ -	£ -	£ -
Local travel	£ 54,857	£ 4,171	£ 59,027
Other	£ -	£ -	£ -
Perth & Kinross Sub-Total	**£ 1,186,846**	**£ 55,660**	**£ 1,242,506**
Green fees			£ 2,799
Perth & Kinross Total			**£ 1,245,306**

Table 4.23: Total additional expenditure by eligible media personnel - Scotland

Category	Event Period	Extended Stay	Total
Accommodation	£ 1,418,211	£ 144,369	£ 1,562,580
Food and drink	£ 245,511	£ 24,108	£ 269,619
Programmes / merchandise	£ 34,515	£ -	£ 34,515
Shopping	£ 3,386	£ 6,428	£ 9,813
Entertainment	£ -	£ -	£ -
Local travel	£ 136,235	£ 18,642	£ 154,877
Other	£ -	£ -	£ -
Scotland Sub-Total	**£ 1,837,858**	**£ 193,546**	**£ 2,031,404**
Green fees			£ 18,600
Scotland Total			**£ 2,050,004**

Table 4.24: Total additional expenditure by eligible media personnel - UK

Category	Event Period		Extended Stay		Total	
Accommodation	£	597,568	£	100,091	£	697,659
Food and drink	£	112,445	£	18,128	£	130,573
Programmes / merchandise	£	53,224	£	-	£	53,224
Shopping	£	916	£	4,467	£	5,383
Entertainment	£	-	£	-	£	-
Local travel	£	70,840	£	11,629	£	82,469
Other spend (in Scotland)	£	2,028	£	-	£	2,028
UK Sub-Total	**£**	**837,040**	**£**	**134,314**	**£**	**971,355**
Green fees					£	11,835
Other spend (in rest of UK)					£	12,106
UK Total					**£**	**995,296**

4.3.3. Contractors, Partners & Licensees

Data was gathered from 28 of the 75 businesses contracted by Ryder Cup Europe to provide services to the event (e.g. power, cleaning, security etc.) and 26 of the 35 event partners and licensees (e.g. clothing and apparel) in order to gauge their expenditure in the host economies. A snapshot of the spending attributable to this group at each level of geography is presented in Figure 4.8.

Figure 4.8: Overview of additional expenditure by contractors, partners and licensees

Table 4.25 shows the number of companies that were included in the economic impact calculation on account of being based outside the host economies and the average expenditure <u>per company</u> is presented in Table 4.26 (overleaf). Such average expenditure estimates represent spending on behalf of a number of individuals connected with non-local companies (including their staff and guests) and take into account any payments to sub-contractors in these locations.

Table 4.25: Derivation of eligible contractors, partners and licensees

	Perth & Kinross		Scotland		UK	
	Contractors	Partners / Licensees	Contractors	Partners / Licensees	Contractors	Partners / Licensees
Companies	75	35	75	35	75	35
% Local	0.0%	0.0%	24.0%	31.4%	97.3%	82.9%
Non-Local Companies	**75**	**35**	**57**	**24**	**2**	**6**

Table 4.26: Average expenditure for contractors, partners and licensees (spend per company)

Category	Perth & Kinross		Scotland		UK	
	Contractors	Partners / Licensees	Contractors	Partners / Licensees	Contractors	Partners / Licensees
Accommodation	£ 10,073	£ 6,379	£ 10,890	£ 50,835	£ 3,840	£ 33,209
Food and drink	£ 8,603	£ 2,713	£ 5,046	£ 7,541	£ 7,680	£ 9,283
Transport	£ 505	£ 95	£ 920	£ 1,645	£ 1,250	£ 5,663
Other	£ 6,927	£ 7,476	£ 5,665	£ 23,164	£ 6,000	£ 8,654
Total	**£ 26,107**	**£ 16,663**	**£ 22,521**	**£ 83,184**	**£ 18,770**	**£ 56,808**

Multiplying the number of eligible companies by the average spend per company in each host economy provides the additional expenditure estimates shown in Table 4.27 (Perth & Kinross, **£2.5m**), Table 4.28 (Scotland, **£3.3m**) and Table 4.29 (UK, **£0.4m**).

Table 4.27: Total additional expenditure by contractors, partners and licensees - Perth & Kinross

Category	Contractors	Partners / Licensees	Total
Accommodation	£ 755,485	£ 223,265	£ 978,750
Food and drink	£ 645,189	£ 94,972	£ 740,161
Transport	£ 37,838	£ 3,336	£ 41,174
Other	£ 519,500	£ 261,644	£ 781,144
Perth & Kinross Total	**£ 1,958,012**	**£ 583,217**	**£ 2,541,229**

Table 4.28: Total additional expenditure by contractors, partners and licensees - Scotland

Category	Contractors	Partners / Licensees	Total
Accommodation	£ 620,725	£ 1,220,031	£ 1,840,756
Food and drink	£ 287,610	£ 180,993	£ 468,603
Transport	£ 52,450	£ 39,476	£ 91,926
Other	£ 322,913	£ 555,925	£ 878,837
Scotland Total	**£ 1,283,698**	**£ 1,996,425**	**£ 3,280,123**

Table 4.29: Total additional expenditure by contractors, partners and licensees - UK

Category	Contractors	Partners / Licensees	Total
Accommodation	£ 7,680	£ 199,251	£ 206,931
Food and drink	£ 15,360	£ 55,697	£ 71,057
Transport	£ 2,500	£ 33,975	£ 36,475
Other	£ 12,000	£ 51,925	£ 63,925
UK Total	**£ 37,540**	**£ 340,849**	**£ 378,389**

4.3.4. Teams & Event Staff

The accommodation and subsistence costs for both teams and event staff were paid by Ryder Cup Europe and are included within the estimate of organisational spend in section 4.3. The host nation agreement allowed Gleneagles to provide 100 free room-nights for captains, players, coaches, caddies and physiotherapists. Any personal spending by teams and event staff is not included in the economic impact estimates, albeit such expenditure would have been minimal in comparison with the spending by other event attendees. For example, post-event enquiries with Ryder Cup/European Tour staff suggest that personal spending averaged around £5 per person per day that they were in Scotland working at Gleneagles, which we estimate to be c. £10,000 in total.

4.4. Organisational Spend

Apart from the expenditure by event specific visitors at the three levels of geography, there was a significant outlay in delivering the event in Scotland. In this section, courtesy of consultations with The Ryder Cup Financial Controller and item by item scrutiny of the accounts, we have been able to estimate the extent of spending at the three levels of geography as well as the amount of Ryder Cup income that originated from the various host economies. Table 4.30 shows the derivation of the net spending by organisers at each level of geography after deducting event revenues (e.g. ticket and hospitality sales, public funding etc.) generated from within each host area.

Table 4.30: Derivation of organisers' net spend

	Perth & Kinross	Scotland	UK
Expenditure in host economy	£ 4,128,734	£ 15,518,965	£ 74,468,297
Less: Income from host economy	£ 1,683,996	£ 26,936,116	£ 55,347,562
Net spend in host area	**£ 2,534,737**	**£ (11,417,152)**	**£ 19,120,734**

At Scottish level, revenue from local sources (£26.9m) exceeds expenditure in Scotland, which explains the deficit of **£11.4m**. The net organisers' spend in Perth & Kinross is estimated at **£2.5m** and the corresponding estimate for the UK is **£ 19.1m** - the latter figure includes the event surplus retained by Ryder Cup Europe, which is based in England.

4.5. Direct and Total Economic Impact

Bringing together the figures from sections 4.1 - 4.3, the direct economic impact of The Ryder Cup 2014 on Scotland as a result of the additional expenditure by event-specific visitors and organisers is estimated at **£24.6m**. The corresponding estimates for Perth & Kinross and the UK are **£19.2m** and **£46.7m** respectively as shown in Table 4.31.

Table 4.31: Direct and total economic impact estimates

Category	Perth & Kinross	Scotland	UK
Spectators	£ 11,502,051	£ 30,135,359	£ 25,983,036
Volunteers	£ 477,440	£ 532,536	£ 213,950
Media	£ 1,245,306	£ 2,050,004	£ 995,296
Contractors, Partners & Licensees	£ 2,541,229	£ 3,280,123	£ 378,389
Visitor Spend Total	**£ 15,765,995**	**£ 35,998,022**	**£ 27,570,671**
Organisers' Net Spend	£ 2,534,737	£ (11,417,152)	£ 19,120,734
Direct Economic Impact	**£ 18,300,733**	**£ 24,580,871**	**£ 46,691,405**
Output Multiplier (Indirect + Induced)	1.060	1.673	
Total Economic Impact	**£ 19,403,671**	**£ 41,134,279**	

The total economic impact on Scotland including indirect and induced effects is estimated at **£41.1m** and the corresponding figure for Perth & Kinross is **£19.4m.** The output multiplier value for Scotland of 1.67 was derived based on the latest 2011 Scottish Industry by Industry Input -Output Tables. At Perth & Kinross level, the output multiplier for Scotland was adjusted based on the pattern of regional employment in Scotland, which resulted in a derived local multiplier value of 1.06.

The impact upon employment throughout the Scottish economy arising from the additional output as a result of The Ryder Cup supported an estimated **619 FTE jobs** in Scotland, according to the employment effects statistics for the country. The Gross Value Added (GVA) throughout the Scottish economy arising from the additional output in Scotland as a result of The Ryder Cup equates to **£19.1m**.

4.6. Total Economic Activity

In this section we report the total economic activity in Perth & Kinross and in Scotland supported by The Ryder Cup, which includes the following:

- The expenditure in each area by all event attendees (regardless of their place of domicile or motivation for being in Scotland).
- The spending of organisers in each area (regardless of where event revenues originated).
- Indirect and induced effects (associated with the direct expenditure of all event attendees and organisers).

As shown in Table 4.32, the total spectator spending in Scotland is estimated at **£40.5m**, which is a combination of the expenditure by event-specific visitors (£30.1m) and casual visitors (£1.1m) from outside Scotland plus the expenditure by spectators resident in Scotland (£9.3m). The corresponding estimate for Perth & Kinross is **£12.2m**.

Table 4.32: Total spectator spend

Category	Perth & Kinross	Scotland
Event-specific visitors	£ 11,502,021	£ 30,135,359
Casual visitors	£ 400,683	£ 1,059,445
Local residents	£ 324,870	£ 9,257,252
Total Spend	**£ 12,227,573**	**£ 40,452,756**

The total spending in Scotland by attendee groups other than spectators and by event organisers is estimated at c. **£23m** - see Table 4.33. This figure excludes any expenditure by Scottish based contractors because this represents a subset of the spending by organisers with businesses based in Scotland. The estimated spending by non-spectator groups and organisers at Perth & Kinross level is **£8.5m**.

Table 4.33: Total spend by other attendees and organisers

Category	Perth & Kinross	Scotland
Volunteers	£ 517,977	£ 1,056,025
Media	£ 1,248,673	£ 2,205,024
Contractors, Partners & Licensees	£ 2,541,229	£ 4,195,151
Organisers	£ 4,128,734	£ 15,518,965
Total Spend	**£ 8,526,613**	**£ 22,965,164**

Bringing together the figures from Table 4.32 and 4.33, we estimate that the total expenditure in Scotland linked to The Ryder Cup by spectators, other attendees and organisers was **£63.4m**, which increases to **£106.1m** including indirect and induced effects - see Table 4.34. As noted previously in section 4.5, **£41.1m** of this economic activity originated from outside Scotland and was additional to the Scottish economy. The total economic activity in Perth & Kinross is estimated at c. **£22m**, which represents significant event related activity at local level.

Table 4.34: Total economic activity

Category	Perth & Kinross	Scotland
Spectators	£ 12,227,573	£ 40,452,756
Other Attendees & Organisers	£ 8,526,613	£ 22,965,164
Total Attendee & Organiser Spend	**£ 20,754,186**	**£ 63,427,920**
Output Multiplier (Indirect + Induced)	1.060	1.673
Total Economic Activity	**£ 21,999,437**	**£ 106,114,911**

5. OTHER SIRC RESEARCH FINDINGS

Having presented the economic impact findings at the three levels of geography, we now consider other aspects of the research undertaken by SIRC commencing with slightly more detail about the type of contracts awarded to Scottish based businesses.

5.1. Spending with Scottish Contractors and Suppliers

Ryder Cup Europe utilised the services of many of the partners, suppliers and contractors who delivered services for regular European Tour golf events. This said, when additional infrastructure services were required, the organisers (where possible) awarded business to contractors based in Scotland in order to benefit the Scottish economy. Some of the event infrastructure fees which impacted upon Scotland were for the following services.

- Catering;
- Cleaning;
- Construction of bus terminals;
- Fibre optics / CCTV;
- Fork lifts;
- Golf course remodelling;
- Health & safety;
- IT network;
- Police and ambulance services;
- Portable power / air conditioning;
- Security;
- Temporary structures / Portakabins / Toilets;
- Track way and temporary roads; and
- Waste management.

Collectively and further to discussions with contractors, Scottish partners and the event Financial Controller, the total amount spent on event infrastructure and organisational costs with Scottish based contractors is estimated at £12.1m (including PGA Centenary Course works). In addition, we estimate that a further £1.2m was spent with Scottish based suppliers and licensees to The Ryder Cup. Aggregating these two estimates results in some £13.3m being spent with Scottish based companies by Ryder Cup Europe (excluding spending on accommodation/subsistence for teams and event staff). Caterers and security providers recruited more than 1,000 temporary staff who resided in Scotland. Moreover, although not included within the economic impact estimates, the delivery of The Ryder Cup Gala Concert was also the responsibility of another Scottish based company.

5.2. The Gleneagles Resort

The Finance Director at Gleneagles was contacted in relation to The Ryder Cup and its impact on the Gleneagles Resort. Whilst we are not able to report the full extent of spending on improvements to the PGA Centenary Course in preparation for the event, the three-year investment on the sub-air system and remodelling various elements of the course are expected to leave a legacy for future generations of golfers to enjoy. Moreover, around half of the costs benefitted Scottish businesses. It is also worth noting that although the Gleneagles Hotel and The Dormy Clubhouse have been refurbished recently, the work was not linked specifically to the hosting of The Ryder Cup.

Ryder Cup merchandise sales in the 18 months prior to the event were healthy, although Gleneagles estimate that not all of the expenditure was incremental and suggested that some sales substituted for its own branded merchandise. Notwithstanding this comment, the Financial Director suggested that Gleneagles Resort revenue during Ryder Cup week was akin to a normal week in September; this was despite many parts of the business being closed for the event including golf courses, other leisure facilities and some restaurants.

The Finance Director from the two-time *Best Golf Resort in the World* according to the Daily Telegraph ULTRA Awards (2013 and 2014) offered the following comments about Gleneagles and The Ryder Cup.

> *The Ryder Cup not only enabled Gleneagles to showcase the spectacular golfing facilities and the PGA Centenary Course, it also presented an opportunity to convey the heritage of the hotel which dates back to 1924 as well as highlighting the rich array of choice at Gleneagles with four restaurants, a destination spa and a host of country pursuits.*
>
> *We are delighted with the enthusiastic and generous feedback on the Gleneagles resort given by the players, officials, commentators, and spectators, together with the armchair viewers and listeners.*
>
> *The Ryder Cup has helped to embed the reputation of Gleneagles as one of the pre-eminent golf resorts in the world.*

Such comments bode well for the future of golf and golf events at The Gleneagles Resort. Indeed there will be a marketing campaign to promote the venue using *The Ryder Cup Was Here* at Gleneagles as a theme and the website includes the following information.

> *The 40th Ryder Cup Matches were played here in Scotland, The Home of Golf on The PGA Centenary Course, Gleneagles. We were proud to be The Host Venue for this iconic global golf tournament that saw Europe triumph over the USA by 16½ to 11½ points.*

5.3. Transport Legacy

An additional element of the study involved highlighting the legacy associated with transport infrastructure enhancements in Scotland. These have been widely reported as £7.4m of improvements to road and rail infrastructure linked to the event, which will deliver a lasting transport legacy for the local community in terms of road safety and public transport generally.

The £3.5m refurbishment of Gleneagles station encompassed various elements including:

- New waiting areas, lifts and toilets;
- Resurfaced platforms;
- Repaint in Caledonian Railway heritage colours;
- Installation of Wi-Fi;
- Additional parking and cycle provision, and
- Bus terminus.

These improvements and the new £3.9m link road from the station to the A9 were funded by partners including Transport Scotland, Perth & Kinross Council, Tactran, First Scot Rail and Network Rail. The local community will benefit from better access to public transport and to local roads around Gleneagles.

The main contract for the road was won by a company based outside Scotland and as yet it is unclear how much sub-contract work was awarded to contractors based in Scotland. Despite this, the legacy was summed up by the Council Leader in Perth & Kinross who commented:

> *[The] Council has been working for many years to secure the improvement of road access to Gleneagles station, making it safer and opening opportunities for a local transport hub. We're delighted that the project has come to fruition in time for The Ryder Cup. The new link road is a key project in our Legacy programme, ensuring long-term benefits for our residents.*

Consultations with Transport Scotland revealed that the improvements referred to above were in transport plans prior to the event, albeit The Ryder Cup played a part in galvanising attention to get the work completed in order to portray Scotland, and in particular Perth & Kinross, in the most positive light. Furthermore, Transport Scotland referenced other works that were designed to leave a lasting legacy, which also came out of Scottish partner budgets; these are summarised below.

- A permanent extension of the park & ride area in Stirling funded by the Council and other partners (£0.5m).
- Resurfacing around the park & ride area in Perth to improve access for buses.
- Enhanced CCTV coverage along the A9 corridor to provide real time traffic information along the trunk road which remains in place (£0.2m).
- The Wi-Fi on trains will remain a permanent fixture to benefit the people of Scotland and was installed partly for The Commonwealth Games and The Ryder Cup.

5.4. Official Charities

Three charities were granted official status and awarded a highly valuable fundraising inventory. The inventory allowed the charities to raise funds on the back of The Ryder Cup which were expected to exceed the face value of the inventory. The Scottish based charities to benefit were:

- Friends of St Margaret's Hospital;
- Perth & Kinross Disability Sport; and
- Quarriers.

In addition, a fourth charity registered in the UK, The McGinlay Foundation, was also awarded official status and worked for the benefit of four nominated charity organisations. According to official figures, fund raising for the Scottish organisations totalled more than £0.53m, whilst for The McGinlay Foundation and smaller charities around the world it exceeded £0.4m.

So far in this report, we have presented the economic impact associated with The Ryder Cup according to event related expenditure by visitors to, and organisers of, the event. The report now summarises the findings from post event research amongst accommodation providers and other service sector businesses in Scotland including Scottish based golf clubs.

5.5. Accommodation Providers' Survey

The post event online and telephone survey of hotels and guesthouses yielded 80 responses from establishments around Perth & Kinross and the wider Scottish economy. In addition we also conducted some pre-event internet searches amongst accommodation providers in January and February 2014 to assess whether room rates had increased at all around the time of The Ryder Cup.

Of the 80 responses to the post event survey, 50% were from providers in Perth & Kinross, 31% from the Stirling area and the remainder (19%) from elsewhere in Scotland with Edinburgh and Dundee accounting for 14%. The sample breakdown by type of accommodation is presented in Table 5.1.

Table 5.1: Sample accommodation type

Type of accommodation	Frequency	%
B&B/Guesthouse	31	38.8
Hotel (3*)	28	35.0
Hotel (4*)	14	17.5
Hotel (1-2*)	3	3.8
Hotel (5* / luxury)	2	2.5
Self-catering	1	1.3
Caravanning	1	1.3
Total	80	100

Almost three-quarters of the sample (74%) offered B&B/guesthouse or 3* hotel services, with an additional 18% of providers offering 4* hotel services. The remainder included 1-2* plus 5* luxury and self-catering accommodation.

5.5.1. Business Activity Levels

According to accommodation providers, key findings that emerged about levels of business were:

- Around one third (30%) reported increased levels of business compared with mid-August to mid-September 2013, of whom more than three-quarters reported significantly increased business.
- More than two-thirds of providers (68%) reported no real change in levels of business.
- During Ryder Cup week more than half of providers (51%) reported increased business whilst 43% reported no change. A minority were less busy (3%) and 3% were unsure.
- Some four in ten providers expected increased business in future due to The Ryder Cup.

5.5.2. Revenue, Rates and Staffing

From a financial perspective the comments about increased business were translated into the following key points compared with September 2013.

- Almost three-quarters of accommodation providers (73%) reported greater than normal takings.
- Some 21% of providers reported no difference in takings; whilst a minority (4%) reported reduced takings compared with the same period in 2013 or that they were unsure (2%).

The net monetary change in takings (allowing for minor decreases) and the net percentage change from 2013 now follow.

- The average increase per provider was £3,577.
- An average 21 percentage point increase on 2013.

The increases reported above are perhaps linked to the increased room rates that were being charged around the week of The Ryder Cup. The research attempted to quantify these based on a sample of 200 providers (including 77 hotels, 64 B&B/guesthouses plus private rentals and short term lets) that were examined in January and February 2014 using internet data to compare rates with those in the week preceding The Ryder Cup. The key findings are presented below.

- Hotel rates increased by an average of £34 per person per night and the equivalent figure for B&B/guesthouses was a £10 per person per night premium on the week preceding the event.
- Rental rates were around £42 per person per night more expensive during Ryder Cup Week.
- Average rates across the sample in Perth & Kinross were up by c. £29 per person per night compared with c. £24 in the rest of Scotland for event week.

Additional information from the post event survey revealed that around seven in ten providers had indeed increased their room rates for The Ryder Cup. In addition, across September as a whole, almost 10% of providers reported higher occupancy levels compared with the same period in 2013.

More than a third of accommodation providers (37%) reported that they incurred extra staff hours as a result of the business created by The 2014 Ryder Cup; costing an average of £257 for an extra 35 hours of staff time.

5.5.3. Ryder Cup Specials

A third of providers reported that they created Ryder Cup special offers such as:

- Group booking discounts;
- Discounts for 10 nights;
- Inclusive food offers and special menus; and
- Extended hours for early morning and late night dining.

5.5.4. Perceptions of Accommodation Providers

There was a general feeling that The 2014 Ryder Cup was beneficial to Scotland and at a more local level; to illustrate this point we offer the following comments from providers.

> *Great for Scotland.*
>
> *Good for showcasing Perthshire and a positive impact on local businesses.*
>
> *The general feel good factor around the area was fantastic during the run up to, and after the event.*
>
> *Impacted positively on the business and customers were delighted with the time they spent here.*

Accommodation providers also noted that business activity was buoyant, in terms of room occupancy levels (consistent with The Scottish Occupancy Survey) and from a financial perspective.

> *The rooms were full with visitors from Southern England and Denmark. Big spenders locally on gifts, playing golf and pubs/restaurants.*
>
> *Our bedroom stock was at maximum occupancy.*

Some providers in close proximity to Gleneagles felt business was quiet during the day whilst the golf was on and also felt that local people perhaps avoided the area due to anticipated congestion problems. By way of examples, the following comments are worthy of consideration.

> *We had 200 bookings cancelled with us as a result of not being able to get to us during the day.*
>
> *Business was quieter during the day than normal due to the spectators having to stay on the course throughout the whole day.*
>
> *The village was not busier for trade because people were away all day.*
>
> *We lost business on the first two days of the week which is predominantly busy for corporate business and think The Ryder Cup may partly have put normal business off.*
>
> *I would think that for future events not having entertainment on site after the golf would make people leave earlier and spend more time and money in the local bars and shops etc.*

The report now presents the key findings from the post event survey of service sector businesses.

5.6. Business Survey

On the Tuesday and Wednesday of Ryder Cup week, the research team travelled around Perth & Kinross and the immediate vicinity to make contact with businesses that were likely to be impacted upon by visitor spending associated with The Ryder Cup. Names and email addresses were used to circulate another post Ryder Cup online survey of how business proprietors felt the event had impacted upon them (if at all). Follow-up emails were sent to businesses to encourage responses and they were subsequently offered the opportunity to complete the survey over the telephone with a member of the research team. The 63 service sector businesses are categorised in Table 5.2.

Table 5.2: Sample of Businesses

Type of business	Responses	Percentage
Public house / bar	17	27.0
Restaurant / coffee shop / cafe	25	39.7
Car hire / rental	7	11.1
Newsagent / grocer / convenience store	4	6.3
Tourist attraction	2	3.2
Other	8	12.7
Total	63	100.0

The majority (two-thirds) of the businesses to respond were food and beverage establishments whilst car rental firms also featured. The other groups featured some speciality shops and other retailers. Some 48% of business respondents were Perth & Kinross based, whilst 44% were from the Stirling area and the remainder (8%) from elsewhere in Scotland.

5.6.1. Business Activity, Takings and Staffing

The key findings to emerge from the post event survey of businesses are now presented.

- 54% of businesses were busier during Ryder Cup week than the same period in 2013. For Perth & Kinross based businesses this figure was 57% and in Stirling it was 46%.
- A quarter of companies reported the same level of business, whilst two in ten were less busy than normal.
- 51% reported higher than normal takings during Ryder Cup week, in Perth & Kinross this figure was 47% and in Stirling 54%.
- A quarter of companies reported no change in takings, whilst two in ten reported lower than normal takings.
- More than three-quarters (77%) of pubs/bars in the sample reported being busier than normal with takings up; whilst the equivalent figure for restaurants/coffee shops/cafes was 40%. The latter figure perhaps reflects the fact that people spent all day at Gleneagles when coffee shops and cafes were most likely to be open.
- A quarter of businesses reported increased levels of staffing during The Ryder Cup which averaged c. 37 hours and cost £302 per business. Across the sample of all businesses the equivalent figures were c. 9 hours at £72 per business.
- Almost a third of respondents expected increased levels of business in 2015 as a result of The Ryder Cup.

Some typical comments from business proprietors are offered below.

Gave the business a great boost. Many of the small businesses in the area rely on Trip Advisor and we got some great reviews as a result of people coming to our business from The Ryder Cup.
(Public House in Stirling)

34 years in the business, that week was the best week in terms of business. (Public House in Perth)

In the interests of balance…

Very little interaction with organisers…. No promotional material or advertising material made available which was very disappointing. No contact from organisers at all before, during or after event or from the Council during same periods. (Coffee Shop in Stirling)

5.7. Survey of Golf Clubs in Scotland

The Ryder Cup was expected to impact on Scottish golf clubs in terms of people watching and spending their money in club houses across the nation but also in terms of the rounds played. This said during event week, we expected rounds played to be only minimally impacted and consequently the analysis examined the period immediately preceding the event as the anticipation grew towards the first tee shot. The sample of golf clubs numbered 72 and was aided by support from The Scottish Golf Union in circulating the online survey link. The response breakdown is summarised in Table 5.3 which is dominated by members clubs.

Table 5.3: Golf Club sample

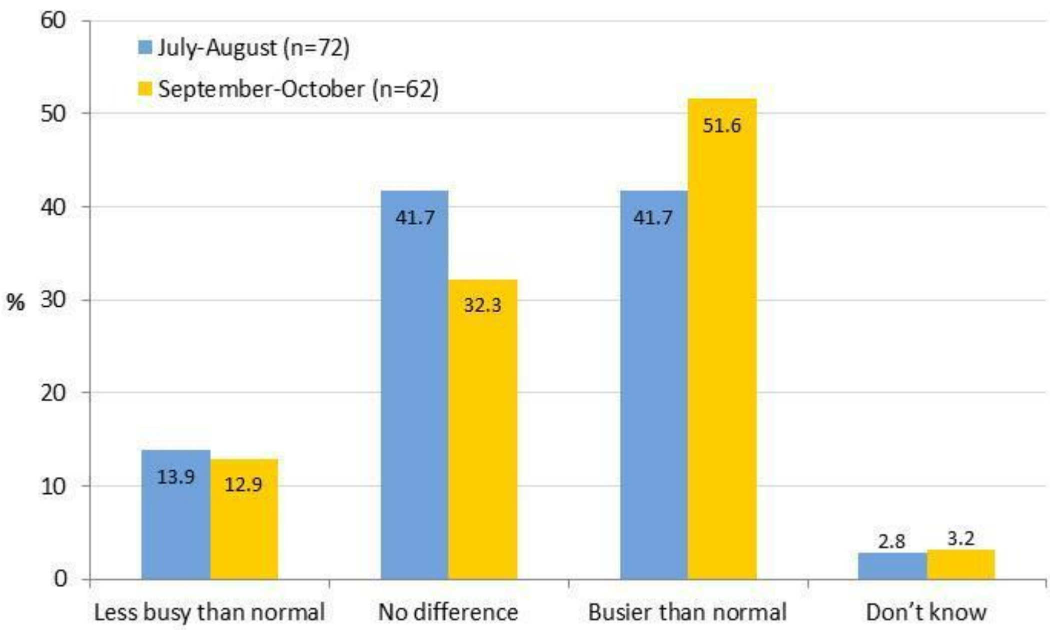
Type	Responses	Percentage
Members club	58	80.6
Municipal / pay and play	1	1.4
Privately owned commercial club / proprietary	9	12.5
Other	4	5.9
Total	72	100.0

5.7.1. Impact on Golf Club Business

As suggested previously The Ryder Cup represented an excellent opportunity for Scotland to showcase its golf offer on the back of the prestige associated with staging the event, particularly given the predicted visitor numbers to Scotland. In order to assess how The Ryder Cup perhaps impacted upon clubs, they were asked to gauge their level of business in the period July-October in comparison with the same period in 2013. Almost two-thirds (64%) of the 72 clubs that responded reported increased takings over the July-October period; of the remainder 23% reported no change, whilst 12% said that takings were slightly lower than normal.

In addition, clubs were also asked about how busy they were across two periods (July-August and September-October) compared with 2013 and the results are summarised in Figure 5.1. This indicates that a higher proportion of clubs were busier in the September-October period which included the event week.

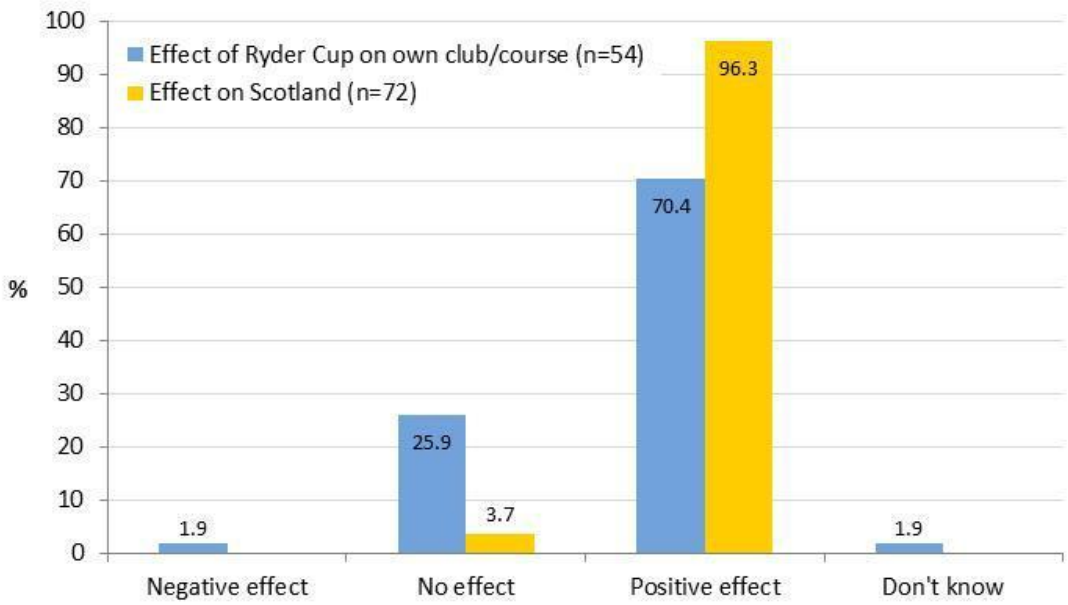
Figure 5.1: Levels of business compared with 2013



Further analysis of the data indicates that in the July-October 2014 period, an average club's takings increased by £11,716 which represents an increase in revenue of more than 9% per club across the sample. Notwithstanding this comment, note that the sample of clubs willing to provide financial data numbered 43 of the 72 clubs.

Golf clubs were also asked about how they expected The Ryder Cup to impact on their business and Scotland in the future. The results suggest that the event was well received given the positive effects expressed for themselves (70%) and for Scotland more generally (96%), see Figure 5.2.

Figure 5.2: Golf club perceptions of Ryder Cup effects



5.7.2. Participation Impact

In order to better understand any changes in the rounds played at golf clubs during the September-October period (around The Ryder Cup) clubs were asked to estimate what was the main change they had experienced. The results from 62 clubs that responded are presented in Table 5.4, which indicates that half of the clubs felt that they gained specifically from visitors to (and workers at) The Ryder Cup.

Table 5.4: Perceptions of Ryder Cup effects on rounds played

Type	Percentage
GAINED business from Ryder Cup visitors & KEPT NORMAL level of rounds from members/guests	50.0
GAINED business from Ryder Cup visitors but LOST SOME NORMAL rounds from members/guests	3.2
DID NOT GAIN business or LOSE business as a result of The Ryder Cup	32.3
DID NOT GAIN business from The Ryder Cup & LOST SOME NORMAL rounds from members/guests	6.5
Unsure	8.1
Total	100.0

Over the same period, some 90% of clubs claimed they had lost no business, and of the 10% who reported a loss of business due to golfers expecting them to be too busy, around half felt that such business was unlikely to return. Furthermore, according to the information provided by the survey of golf clubs, we estimate that there was an 8.4 percentage point increase in the number of rounds played around the month of The Ryder Cup (September-October) compared with the same period in 2013.

5.7.3. Marketing Impact

More than half of the clubs that responded (51%) had engaged in activities designed to boost business as a result of The Ryder Cup. From a list of prompts where they could mark all that applied, the findings in Table 5.5 suggest that there was a degree of engagement with the event by Scottish golf clubs. Some 29% of clubs tried to promote social events (e.g. where members and guests could watch live coverage of The Ryder Cup in the clubhouse), whilst 26% engaged in some form of Ryder Cup marketing to boost business. In addition, around 1 in 5 clubs put on special offers prior to, and during the event to encourage business.

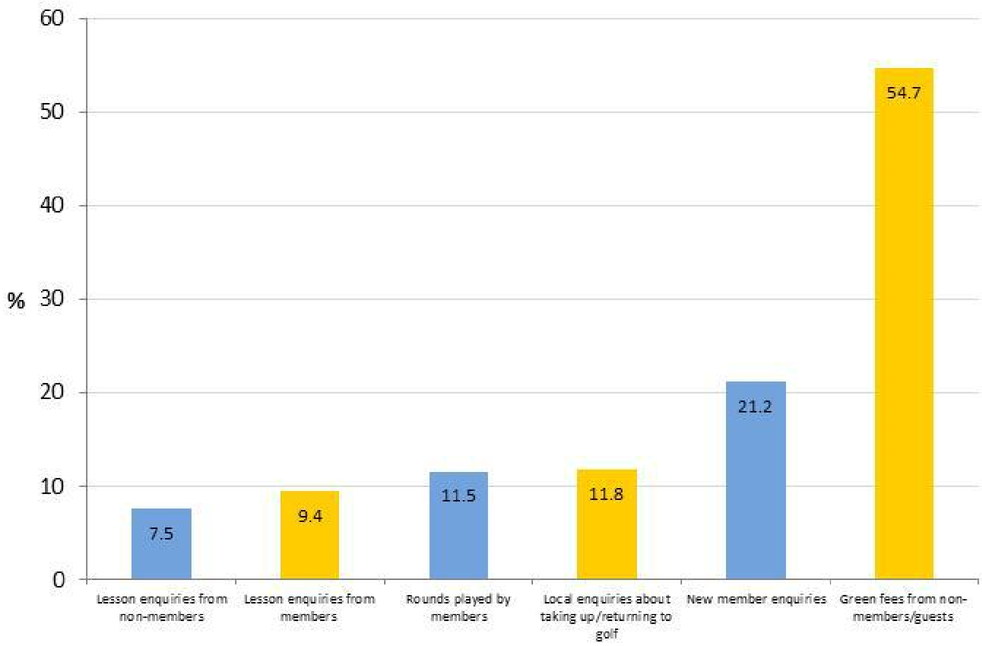
Table 5.5: Ryder Cup marketing and offers

Type	Percentage
Social events (e.g. television coverage in clubhouse)	29.2
General Ryder Cup marketing	26.4
Offers during The Ryder Cup	19.4
Pre Ryder Cup offers	18.1
Post Ryder Cup offers	2.8
Reduced green fees	2.8
Increased green fees	2.8

5.7.4. Other findings

Clubs were also prompted specifically about other impacts associated with The Ryder Cup as shown in Figure 5.3 which reemphasises the point made previously about an increased number of green fees from non-members and guests (55%) during the period around the event, as well as in the rounds played by members (12%) . Moreover, the findings suggest that there had been an increase in new-member enquiries (21%), with a further increase in local people considering taking up, or returning to golf (12%).

Figure 5.3: Types of increased business



Golf club secretaries were also asked whether they agreed with a series of statements in relation to The Ryder Cup. The percentages agreeing with each statement are presented in Table 5.6 below, which suggests that eight out of ten clubs believed that The Ryder Cup would help to attract other major events to Scotland. In addition, almost seven out of ten clubs believed that the event would lead to sustained tourism and golf tourism benefits for Scotland.

Table 5.6: Levels of agreement with 'The Ryder Cup'...

Type	Percentage
has increased the level of interest in learning to play golf	39.6
has helped sustain and grow golf in Scotland	57.7
will create a long-term increase in golf tourism in Scotland	67.9
will create a long-term increase in tourism in Scotland	67.9
will help to bring other major events to Scotland	79.6

Some of the other comments from golf club secretaries included these excerpts.

We have had our busiest year on record in terms of visitors playing the course. The Ryder Cup ensures we were fully booked for 3 weeks around the event. It was a great advert for golf in Scotland.

I spoke to a great many visitors and did not receive one single negative comment about their experiences in Scotland. In addition to the increase in revenue, The Ryder Cup brought many first time visitors who will definitely return and will have become ambassadors for the country.

I feel the event was beneficial to the "showcase" clubs and clubs in the central belt. It is too early to say if there will be a longer term benefit for all clubs or for an increase in people playing golf. This will be revealed over the next year or two. The impact could be on overseas visitors.

We now present additional elements of the project that examined social impacts on spectators and volunteers based on the findings from two post-event online surveys.

5.8. Spectator Perceptions

The post event online survey of spectators was designed in conjunction with event partners to assess:

- Spectator experiences of previous editions of The Ryder Cup and plans to attend in future.
- Spectator satisfaction with The Ryder Cup and its delivery.
- Overnight stays and accommodation types.
- Media interactions and travel perceptions.
- Spectator perceptions of Scotland as a golf destination.
- Spectator perceptions of Scotland and intentions to revisit.
- Ryder Cup influences on golf participation.
- Spectator perceptions around the environmental impact measures taken (see later section).
- Generic feedback by way of an open question at the end of the survey.

The main points emerging are summarised in this section with more detailed findings provided in a separate PowerPoint presentation. The overall sample was 8,419, of which 5,520 responses were from the post event online survey from where the majority of these findings are drawn.

5.8.1. Previous Ryder Cups and their influence

- 17% of respondents had attended at least one of the previous four editions.
- 13% attended Celtic Manor in 2010, 5% went to the K Club in 2006, 3% were at Medinah in 2012 and 1% attended Valhalla in 2008.
- Of those who attended Celtic Manor (1,075) 62% were from England, 15% from overseas, 13% from Scotland, 4% from Wales and the remainder from the rest of the UK.
- 46% of visitors to Wales in 2010 had since been back for a short break or leisure; of these, more than half (52%) said The Ryder Cup had some influence on their decision to return.

- 40% of repeat visitors to Wales had returned to play golf.
- 77% of UK based spectators who attended Celtic Manor in 2010 said it influenced their decision to attend in 2014; the equivalent figure for visitors from overseas was 74%.
- 58% of spectators who attended at least one of the four previous editions rated 2014 as the best with a further 32% rating 2014 just as good as previous editions.

5.8.2. Future Ryder Cups

- 12% expected to attend in Minnesota, USA in 2016.
- 39% expected to attend in France in 2018.
- 6% expected to attend in Wisconsin, USA in 2020.
- Almost half of spectators would support charitable causes designed to limit the environmental impact of The Ryder Cup.

5.8.3. Ryder Cup Delivery Satisfaction

- 92% of respondents rated their overall experience at The Ryder Cup as excellent/above average, with 71% reporting an excellent overall experience. The equivalent figures for spectators from the rest of the UK and overseas were 93% and 91% respectively.
- 97% of respondents were satisfied with the welcome they received at Gleneagles.
- 96% were satisfied with the information they received about the event.
- 80% were satisfied with the official merchandise quality (8% were not); 78% were satisfied with on-site catering quality (18% were not).

5.8.4. Accommodation and Satisfaction

- 63% of respondents stayed overnight away from home.
- 3* and 4* hotels and B&B/guesthouses were popular during Ryder Cup week with 20%, 13% and 17% of overnight stayers respectively.
- For extended stays 3* (10%) and 4* (15%) hotels plus B&B/guesthouses (19%) were again popular, whilst self-catering accommodation was the choice of 17% of spectators.
- 24% of spectators who stayed overnight during event week lodged with friends and family; whilst 18% did so on extended stays.
- Perth & Kinross (26%) and Edinburgh (29%) were the most popular locations to stay during Ryder Cup week and the equivalent on extended stays was 30% and 22% respectively.
- 50% of accommodation was booked directly with the provider; 33% via an online portal.
- The quality, value and ease of booking of accommodation plus the welcome received and proximity to the course all achieved satisfaction ratings of between 80 and 90%.
- Popular activities amongst the 23% on an extended stay in Scotland were sight-seeing (43%), golf (40%), shopping (37%), walking in town (35%) or taking a short walk (32%).
- 7% of respondents had people with them who did not attend The Ryder Cup who mainly shopped (51%) or went sight-seeing (44%).

5.8.5. The Ryder Cup in the Media

- 65% watched live TV coverage whilst 51% watched TV highlights.
- 51% followed the event online.
- 39% used the Ryder Cup App which received c. 207,000 downloads (according to Ryder Cup statistics).

5.8.6. Travel and Transport

- 92% of all respondents were satisfied with the overall transport provision.
- The most popular forms of transport used by spectators during their journeys to and from Gleneagles were car (46%), park & ride bus shuttle (51%) and train (29%). Taxi and hire cars made up a further 17%.
- 48% of park & ride users had utilised the shuttle service from Stirling.
- 93% of those using park & rides were satisfied with the signage/directions; 97% were satisfied with the frequency of the bus shuttles; there was 96% satisfaction with traffic flow on the roads and 94% were satisfied with the quality of the buses.
- Amongst train users, three quarters (76%) were satisfied with the frequency of trains to and from the course.
- Amongst those who used the train and/or scheduled bus services (32%), more than half (53%) had accessed the free Wi-Fi.
- Around seven in ten respondents who used the free Wi-Fi were satisfied with it.

5.8.7. Attitudes of Scottish Residents

- Overwhelmingly positive with agreement of between 93% and 97% that The Ryder Cup…
  - Showcased Scotland as a tourist destination (97%).
  - Will help bring other major events to Scotland (93%).
  - Increase Scottish tourism (94%).
  - Showcased Scotland as *The Home of Golf* (96%).
  - Gave residents pride in Scotland (95%).
  - Made residents excited to be part of such a major event (97%).
- More than half (52%) felt the event would encourage business to relocate to Scotland.
- More than three-quarters (77%) disagreed that the event had had too much spent on it.

5.8.8. Attitudes of Visitors to Scotland

- Around eight in ten visitors to Scotland felt The Ryder Cup showcased Scotland as an events and entertainment destination (82%) and reinforced it as *The Home of Golf* (81%).
- 84% will recommend Scotland as a visitor destination to friends and family and 74% now consider Scotland as a tourist destination.
- 76% are more likely to return to Scotland for a short break or holiday and 61% to play golf.

5.8.9. Scotland as a Destination

- Scotland was the most highly rated place to play golf with 95% rating it good/very good; 93% of all visitors to Scotland rated it as a good/very good place to play golf.
- 97% of respondents agreed/strongly agreed that Scotland is *The Home of Golf.*
- 95% agreed/strongly agreed that Scotland is *The Perfect Stage* to host The Ryder Cup.
- 91% agreed/strongly agreed Scotland is a world class events and entertainment destination.
- 68% of visitors to Scotland expected to return within a year for a break/leisure; 73% of UK based visitors and 57% of those from overseas expected to return.
- 60% of visitors to Scotland expected to revisit Perth & Kinross within a year.

5.8.10. Golfing Profile and Participation Influences

- 79% of respondents played golf, 10% used to play and 10% had never played.
- 53% of respondents played most often at a members golf club, 12% at a municipal course, 10% just socially and 4% at a proprietary course.
- 16 is the average handicap amongst spectators who played golf.
- 57% played at least weekly, whilst of those with an official handicap (71%) almost three-quarters played at least weekly.
- Half of respondents were more likely to take up golf/play more as a result of attending The Ryder Cup; 48% were more likely to encourage friends/family to play. The equivalent figures for Scottish residents were 49% and 44% respectively. The *Swing Zone* and putting advice areas in the Tented Village were particularly well used which reflects the findings above.
- Two-thirds of the sample (67%) felt inspired to attend more sport/cultural events as a result of their attendance at The Ryder Cup.

5.8.11. Homecoming Scotland

The at event survey of spectators at Gleneagles asked people questions about Homecoming Scotland which were consistent with those used in similar research being undertaken at The Glasgow 2014 Commonwealth Games. The key findings from the 2,899 respondents are presented below.

- 42% of respondents were aware of the Homecoming Scotland 2014 celebrations; awareness amongst Scottish residents increased to 77% and decreased to 16% amongst visitors to Scotland (from the rest of the UK and overseas).
- 30% of those who were aware of Homecoming attended/planned to attend an associated event, 57% did not and the rest (13%) were unsure at the time of the survey.

5.8.12. Generic Spectator Feedback

The post event online survey of spectators also included an open question for respondents to provide any additional information about their personal experiences of The Ryder Cup. In total, there were 3,376 comments which were subjected to a detailed content analysis from which a number of key themes emerged. In the interests of balance these include positives plus potential areas for improvement which may benefit future Ryder Cup / golf events and we provide some exemplar comments by way of illustration in Appendix C.

5.9. YouGov Omnibus Survey[2]

VisitScotland's insight team commissioned eight waves of the YouGov Sporting Tracker online GB Omnibus Survey (2013-2014) to gauge public awareness of The Ryder Cup. The final wave in December 2014 asked slightly different questions as to whether people had attended or viewed the event. A statement about *Scotland, The Home of Golf* was tracked throughout the eight waves of questions. The survey utilised an online omnibus interview administered to members of the YouGov Plc GB panel of more than 350,000 individuals who had agreed to take part in surveys. In each of the eight waves (March 2013 - Dec. 2014), the survey achieved a sample size which exceeded 2,000 adults and the findings have been weighted to be representative of all GB adults. The key findings are presented below.

- For the GB audience, spontaneous awareness of The Ryder Cup increased from 2% in March 2013 to 8% in September 2014. In Scotland during the same period, the increase was much higher from 11% to 30%.

[2] Data taken from: *Sporting Events Tracker Waves 1-8 Summary: Ryder Cup Awareness.* VisitScotland Insight Department (January 2015)

- When prompted, The Ryder Cup was known to 27% of GB respondents in September 2014, a seven percentage point increase from March 2013 (20%). Prompted awareness of respondents living in Scotland immediately before the event stood at 60%.
- In December 2014, 51% of GB respondents were aware that The Ryder Cup had taken place at Gleneagles, Scotland; amongst Scottish residents the corresponding figure was 85%.
- TV was the most popular platform used to follow The Ryder Cup, with 22% of respondents watching live on TV, 22% watching TV highlights and 27% who heard or watched the news.
- In December 2014, on average, four out of ten GB respondents agreed to some extent that Scotland is the *Home of Golf*, whilst almost half (48%) were undecided or did not know. These results were relatively consistent with previous results from March 2013 – Sept. 2014.
- In December 2014, the majority of Scottish residents (80%) agreed to some extent that Scotland is the *Home of Golf*, which is approximately double that of the GB total.

5.10. Scottish Occupancy Survey

VisitScotland provided data from The Scottish Occupancy Survey up to the end of September 2014 in order to try and establish whether there were any discernible changes perhaps linked to The Ryder Cup. Whilst it is virtually impossible to attribute any differences to the event, there now follow some of the most noticeable findings which are indicative only given some of the small sub-samples derived from the omnibus survey undertaken by TNS Travel & Tourism.

- Self-catering sector bed occupancy in Perthshire during September 2014 increased by 12 percentage points on the 2013 figure to 74%. The change was linked entirely to stays in houses, flats, bungalows and cottages rather than chalets or caravans.
- Hotel bed and room occupancies in Scotland for September 2014 were four and three percentage points higher than the corresponding figures in September 2013, at 63% and 83% respectively.
- Hotel bed occupancy in Perthshire for September 2014 was 72%; an increase of 12 percentage points on the September 2013 figure. Hotel room occupancy in Perthshire increased by three percentage points compared with September 2013 to 83%.
- B&B/guesthouse bed and room occupancies in Perthshire for September 2014 were seven and nine percentage points higher than the corresponding figures in September 2013, at 55% and 67% respectively. The Edinburgh & Lothian's region experienced similar increases in bed and room occupancies of eight and 11 percentage points (to 62% and 76% respectively), compared with September 2013.

5.11. Volunteer Survey

Given the immense importance of the volunteer contingent in delivering The Ryder Cup for Scotland, another post event survey was undertaken. This was designed to gauge opinion which would potentially benefit future editions of the event and also the people of Scotland in up-skilling its volunteer workforce for other events (golf and otherwise) to be staged in years to come. The survey was designed to assess:

- Predisposition to volunteering;
- Volunteer experiences of The Ryder Cup;
- The time contribution and notional value; and
- Propensity to volunteer in future.

5.11.1. Volunteer Sample

The characteristics of the sample of 572 volunteers who responded to the online survey are summarised in Table 5.7, which also defines the roles that they fulfilled. More than three quarters of the sample were male with the majority reporting their ethnicity as 'white' and an average age of almost 54 years. Two-thirds of the volunteers resided in Scotland which suggests that there will be an experienced volunteer-force for Scotland to draw upon in the future.

A variety of roles were fulfilled in order to deliver the best event possible, the most common being as a marshal/scorer, working on merchandise sales or as a driver. In addition, some 14% of volunteers were appointed to leadership roles.

Table 5.7: Volunteer characteristics

Sex	
Male	75.9%
Female	24.1%
Age	
Average age	53.7 years
Age range	16 - 79
Ethnicity	
White	98.3%
BME	1.7%
Domicile	
Scotland	65.4%
England	20.5%
Rest of UK	4.0%
Overseas	10.1%

Role	
Marshal / Scorer	46.5%
Merchandise	15.3%
Courtesy Car Driver	7.5%
Spectator Assistance	5.6%
Bus Ambassador	5.1%
Park & Ride	4.1%
Hospitality	3.3%
Media Centre	1.4%
Access Buddy	1.4%
Other	9.7%

5.11.2. Previous Experience

Volunteers were drawn from a variety of sources and had varying levels of voluntary experience as shown in Table 5.8. Some 90% of the sample had previous volunteering experience with only 10% having none.

Table 5.8: An overview of previous volunteering experience by gender

Volunteer experience…	Male		Female		Total	
	Yes	No	Yes	No	Yes	No
At a previous Ryder Cup	17%	83%	6%	94%	14%	86%
At another major golf event	68%	32%	54%	46%	64%	36%
At another sports event	34%	66%	46%	54%	37%	63%
At a non-sporting event	18%	82%	26%	74%	20%	80%
Anywhere					90%	10%

Almost two -thirds of all volunteers (64%) had previous volunteering experience from other major golf events, whilst more than a third had gained such experiences at other sports events and one in five at other events generally. Approximately 14% of the sample had volunteered at previous editions of The Ryder Cup and of these the majority were male. The experience at previous editions was mainly from Celtic Manor (11% in 2010) and Medinah (4% in 2012). Further analysis indicated:

- 58% of volunteers had undertaken other voluntary work in the last year.
- Volunteers spent on average c. 17 hours per month volunteering.

5.11.3. Volunteering Contributions at The Ryder Cup

The research attempted to estimate and value the time contribution of volunteers by aggregating upwards from the sample of respondents, using ONS figures for the average hourly wage rate in 2014 across all industries of £11.54. The findings are now presented.

- On average the majority of volunteers contributed their time across 6 days.
- On average the majority of volunteers contributed around 8 hours of time per day.
- Average contribution by volunteer at The Ryder Cup was c. 48 hours.
- Aggregate time contribution of 2,050 volunteer's c. 98,000 hours, c. 4,800 full (24 hour) days.
- Aggregate value of this voluntary support c. £1.13m.

These figures provide a reasonable proxy for the massive undertaking that the event was for Scotland.

5.11.4. Volunteer Intentions and Perceptions

A series of additional questions examined the intentions of volunteers to continue volunteering in future and also their perceptions of the experiences they had at The Ryder Cup. The key points emerging included the following.

- 77% of respondents intended to volunteer again in the next year.
- 58% of Scottish volunteers intended to register for future volunteering opportunities at volunteerscotland.net; 5% of other UK based volunteers also intended to register.
- 63% of respondents felt that volunteering at The Ryder Cup would look good on their CV.
- 71% felt that volunteering at The Ryder Cup had developed their skills.
- 56% felt The Ryder Cup had helped their personal development.
- 53% felt the event had improved their self-confidence.
- In terms of future volunteering 85% of the sample said they would like to volunteer again at The Ryder Cup; 86% at other European Tour events; and 74% at other sports events.
- More than half of the sample felt more interested in sports volunteering as a result of The Ryder Cup.

The information above suggests that The Ryder Cup 2014 had a positive impact on volunteers, in terms of both their personal development and future volunteering intentions. Further volunteer perceptions about their experiences at Gleneagles are presented below.

- 63% felt that they had clear instructions for their role at The Ryder Cup.
- 66% felt that they were well provided for at The Ryder Cup.
- 70% felt that their efforts were appreciated.
- 74% felt able to talk to their managers about any event related problems.
- 59% felt that communication from management was good.
- 39% felt that their deployment was well planned, while some 58% thought not.
- A third felt too much was expected of them, while two-thirds did not.

6. OTHER RESEARCH

In this penultimate section of the report, we incorporate summaries of research undertaken by other companies (Repucom) around the media impact associated with the event and environmental impacts (provided by Golf Environment) on the Green Drive initiative. Finally, we present an overview of The Ryder Cup Education Programme which ran prior to, and alongside, the event plus details of the influence of The Ryder Cup on other golf events in Scotland.

6.1. Media Evaluation (based on data provided by Repucom[3])

6.1.1. Approach

The monitoring of global television coverage of The Ryder Cup was undertaken post event by Repucom in order to assess the media equivalency value (MEV) achieved from the exposure generated by the event. Beyond the basic MEV, Repucom also present another value (QI) based on the quality of the exposure according to the following:

- On screen size (i.e. the size of any advertising relative to the screen size);
- The duration of any on screen exposure;
- The proximity of any exposure to the centre of the screen;
- The number of simultaneous messages on screen (brand hits); and
- An impact factor weighting based on the advertising property being used.

Apart from the value of exposure on Ryder Cup telecasts Repucom also conducted similar analyses of coverage: on television news; in the print media; and online. Details of the TV feeds, markets and timeframes employed are presented in Figure 6.1 below.

Figure 6.1: Scope of the analyses by Repucom

The data presented in this section represent a snapshot of the overall Repucom report with particular reference to Scotland and Scottish partners as well The Ryder Cup brand. During the coverage of The Ryder Cup, Gleneagles, Perth & Kinross and Scotland received exposure from

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[3] A 100 page Media Evaluation of the 2014 Ryder Cup was produced for The European Tour by Repucom. Key points are summarised herein and tables are reproduced with permission of The European Tour.

vignettes and scenic postcard shots of Gleneagles and the surrounding area. Such exposure coupled with verbal mentions of Gleneagles and Scotland by commentators plus on-screen graphics (related to Scotland) has been aggregated and the cost of such exposure in the commercial marketplace has been calculated by Repucom in accordance with sponsorship industry standards. All of the media values have been converted from US Dollars using an exchange rate of US$1:£0.62 which represents the average rate across the analysis period.

Whether or not the value attributable to The Ryder Cup coverage actually stimulates viewers to visit Scotland is beyond the scope of this project; however, anecdotally this is what is hoped for. While the value in and of itself may not guarantee increased tourism to Scotland, it provides an excellent platform for promotional purposes. Moreover, the relevant tourism agencies could commission follow-up research designed to assess whether or not a future tourist's decision to visit was at all influenced by seeing The Ryder Cup (in Scotland) on television, in the press or online.

6.1.2. Television Coverage and Audience

The key points about the extent of the worldwide television coverage are as follows.

- The 2014 edition of The Ryder Cup secured 4,922 hours of coverage across 50 broadcasters across almost 200 territories worldwide; almost double the 2,532 hours in 2010.
- Europe accounted for 65% of the coverage (3,204 hours).
- Some 1,952 hours of The Ryder Cup were broadcast 'live'.
- The estimated cumulative worldwide TV audience is 25.4m viewers.
- The UK and US markets accounted for 63% of the cumulative audience.

More details of the global coverage in the key markets are presented in Figure 6.2 which is reproduced from the full Repucom report. The eight key markets according to Repucom account for more than two-thirds (67%) of the cumulative worldwide audience.

Figure 6.2: Key market TV audience and coverage

Market	No. of Broadcasts		Total Duration		Live Audience		Cumulative Audience	
United Kingdom	36	3%	121:53:00	2%	2,172.50	16%	8,298.50	33%
USA	18	1%	103:43:00	2%	6,096.20	44%	7,660.40	30%
Ireland	37	3%	124:17:00	3%	156.2	1%	481.5	2%
South Africa	55	4%	118:14:00	2%	192	1%	364.7	1%
Italy	21	2%	82:52:00	2%	80	1%	107.1	0%
Australia	13	1%	68:58:00	1%	24.5	0%	60.3	0%
Spain	39	3%	107:13:00	2%	29.3	0%	37.3	0%
Germany	20	2%	98:57:00	2%	24.6	0%	31.9	0%
KEY MARKET TOTAL	239	18%	826:12	17%	8,775.4	64%	17,041.6	67%
ROW	1,093	82%	4,096:28	83%	5,035.4	36%	8,353.3	33%
GLOBAL TOTAL	1,332	100%	4,922:40	100%	13,810.8	100%	25,394.9	100%

The extent of the coverage at UK and USA levels is presented in Figure 6.3 and indicates that Sky and the BBC dominated the coverage at home; whilst in the United States NBC and The Golf Channel broadcast the event. Interestingly, despite the BBC showing only around five and half hours of recorded highlights, the fact that it is a terrestrial, free to view channel resulted in it accounting for around two-thirds (65%) of the cumulative UK audience. In the USA, a similar scenario occurred with NBC which broadcast less coverage than The Golf Channel, but had almost double the audience.

Figure 6.3: UK / US coverage and audiences by broadcaster

Channel	Duration (hh:mm)	Cumulative Audience (000's)
BBC2	05:29:29	5,189.1
Sky 1	02:56:16	29.0
Sky Sports 4	113:28:03	3,080.4
GRAND TOTAL	122:02:10	8,023.6

Channel	Duration (hh:mm)	Cumulative Audience (000's)
Golf Channel	86:43:00	2,651.2
NBC	17:00:00	5,009.2
GRAND TOTAL	103:43:00	7,660.4

6.1.3. Media Value of Global Television Coverage

The value associated with the global television exposure for The Ryder Cup brand and also for Scotland is now presented. Not surprisingly The Ryder Cup logo and brand dominate the figures; however, Scottish branding also received valuable levels of exposure as shown in Table 6.1.

Table 6.1: Value of exposure on television

Brand	Exposures	Duration (sec.)	100% MEV	QI Value
The Ryder Cup	1,869,503	9,793,726	£ 113,860,713	£ 31,766,176
Gleneagles	107,393	617,922	£ 8,599,229	£ 2,998,066
Scotland, The Home of Golf	65,527	522,233	£ 4,321,244	£ 802,780
Scotland	41,323	259,845	£ 5,741,137	£ 835,653
Perthshire	13,416	98,388	£ 1,977,508	£ 244,757
SCOTLAND OVERALL	**227,659**	**1,498,388**	**£ 20,639,118**	**£ 4,881,255**

The 100% MEV from the television exposure of the Scottish brands amounts to £20.6m; however, the QI score (based on the Quality Index of each exposure) amounts to almost £4.9m based on exposure lasting more than 416 hours. The corresponding QI score for The Ryder Cup brand is £31.8m from more than 2,720 hours of exposure. The overall value of the exposure according to the various levels of analyses undertaken by Repucom is presented in the next section.

6.1.4. Overall Value by Media Platform

The media value according to QI scores from various media platforms is presented in Table 6.2.

Table 6.2: Overall value across various media platforms

Brand	Television		TV News		Print[4]	Online	QI
	100% MEV	QI	100% MEV	QI	QI	QI	Total
The Ryder Cup	£ 113,860,713	£ 31,766,176	£ 7,781,198	£ 2,145,450	£ 2,691,320	£ 5,568,859	**£ 42,171,805**
Gleneagles	£ 8,599,229	£ 2,998,066	£ 2,559,138	£ 547,138	£ 692,918	£ 3,343,136	**£ 7,581,258**
Scotland	£ 4,321,244	£ 802,780	£ 298,644	£ 61,776	£ 253,666	£ 1,337,773	**£ 2,455,995**
The Home of Golf	£ 5,741,137	£ 835,653	£ -	£ -	£ 23,582	£ 37,193	**£ 896,429**
Perthshire	£ 1,977,508	£ 244,757	£ -	£ -	£ 25,156	£ 93,700	**£ 363,613**
VisitScotland	£ -	£ -	£ 82,674	£ 15,328	£ -	£ -	**£ 15,328**
SCOTTISH BRANDS	**£ 20,639,118**	**£ 4,881,255**	**£ 2,940,456**	**£ 624,242**	**£ 995,323**	**£ 4,811,802**	**£ 11,312,621**

[4] Note that there was no 100% MEV data published in the Repucom report relating to print and online media analyses.

As summarised above the overall QI score associated with media exposure from television, TV news, the press and online of The Ryder Cup brand amounts to £42.2m. The corresponding QI score according to the exposure achieved across all of the Scottish brands is £11.3m, of which exposure from television (£4.9m) and online (£4.8m) are the major components.

Other data in relation to the internet and social media revealed the following points.

- In September, traffic to www.RyderCup2014.com peaked at more than 1.8 million sessions;
- During event week, there were almost 700,000 mentions of Ryder Cup related content on social networks; and
- The official Ryder Cup App was downloaded almost 207,000 times.

Having revealed the media value associated with The Ryder Cup, the report now presents a summary of the findings from a report on the Green Drive environmental initiative.

6.2. Environmental Impact Management

Green Drive was delivered by the Golf Environment Organisation to showcase sustainable construction and management of temporary venues, and demonstrate an innovative and responsible approach to the planning and delivery of tournaments including post-tournament legacy, building on experiences from The 2010 Ryder Cup at Celtic Manor. Green Drive set out to contribute to the delivery of a high quality, successful tournament that generated positive and lasting economic, social and environmental impacts.

Green Drive for The 2014 Ryder Cup set out ambitious aims which included:

- Minimising / reducing the physical environmental footprint of the event;
- Maximising the advocacy potential of The Ryder Cup for sustainable lifestyles/livelihoods;
- Showcasing commitment, solutions and real world outcomes.

6.2.1. Suppliers and Procurement

The Sustainable Procurement Code underpinned the tracking of suppliers and service delivery to enable a greater understanding of the event's contractors and their commitment to sustainability. The Code was an evolution of the Sustainable Procurement Code developed for the 2012 London Olympics and now being increasingly used for major sporting events.

Two thirds of suppliers had in place a sustainability policy, often the first step in improving the environmental performance of an organisation; highlighting that more and more companies are considering sustainability and approaching it in a positive way. Some 10% of suppliers are certified to ISO 20121:2012, a complex standard, which is awarded in recognition of excellent sustainability processes and procedures in event related work.

6.2.2. Energy

Energy requirements to stage a major event can rarely be provided by mains supply and the staging team worked closely with the main suppliers of temporary energy, to deliver the most reliable, efficient, low carbon temporary power solution. The supplier used 29,394 litres of pure biofuel throughout the event to power generators, replacing and reducing the need for non-renewable fuel by 10%.

6.2.3. Waste

The 2014 Ryder Cup achieved the target of sending zero waste to landfill, however it was recognised that higher rates of recycling could have been achieved. Among several other initiatives, Green Drive worked closely with the contractors and sub-contractors responsible for the provision of temporary event structures, seating and interiors to save large quantities of material to be collected and reused by other organisations and charities. A range of materials were identified and they were able to re-distribute aluminium, PVC, glass, plastic extrusion and 90% of the timber through these channels, in addition to over 70% of the carpet, vinyl and Astroturf from the Aviemore and RCTS grandstands. The result of reuse is not only that communities and charities benefit from materials they are able to utilise, but also that it diverts waste from recycling, incineration or landfill and encourages people to look at waste differently; as a resource rather than something to be disposed of.

6.2.4. Legacy Programmes

Ryder Cup Europe supported four local outreach projects as part of the event, with funding received from the Scottish Government amounting to £250,000. The ventures supported were as follows.

- The John Muir Trust, which works to connect people of all ages and backgrounds with nature, and conserve Scotland's finest wild places for generations to come;
- Perthshire Big Tree Country, focussing on conserving Perthshire's woodland heritage and ancient trees;
- Sustainable Golf Clubs with the Scottish Golf Union which helps clubs to create new woodlands, meadows, ponds and wetlands; and
- Zero Waste Fortnight led by Perth & Kinross Council to reduce waste in Auchterarder and Aberuthven through community projects.

6.2.5. Visitor Survey

The post event online spectator survey conducted by SIRC featured several questions to assess public sustainability awareness and Green Drive communications. The survey returned the following results.

- 25.6% of spectators questioned after the event were aware of the Green Drive initiative;
- 65.7% were aware of the recycling points located throughout the staging areas;
- 24% noticed the fair trade information advertised at food outlets;
- 45% were either fairly or very willing to donate in the future if their money went towards meaningful and charitable causes relating to local communities and the environment surrounding large golf events; and
- Of the spectators questioned, their top three environmental priorities and those which ranked the most important were nature, transport and waste, with 68% stating waste amongst their top three.

The results not only helped to assess the current success of communications, but have the potential to act as a benchmark for future golf events to be compared with. Furthermore a final question on the online survey of spectators revealed that some 45% would support environmental charitable causes at future editions of The Ryder Cup.

6.3. Ryder Cup - Education

In order to involve as many local schools as possible in The Ryder Cup and as part of the legacy planning around the event, a Ryder Cup themed education learning and teaching resource was developed by Perth & Kinross, Clackmannanshire and Stirling Education Services; with the help of Education Scotland, *ClubGolf* and the Scottish Government.

The scheme involved a virtual, interactive version of the PGA Centenary Course at Gleneagles which included resources for children to use at school or at home in the run up to, and for the duration of, The Ryder Cup. Each hole provided a different framework for learning and covered subjects linked to the Curriculum for Excellence including history, science and, (through an association with *ClubGolf*), physical education. Accompanying resources and planning documents for educators, helped them to develop classwork on Ryder Cup themes for young people.

From http://www.rydercupeducation.com/

Perth & Kinross Councillor and Convenor of Lifelong Learning Bob Band commented[5]:

> *The Ryder Cup Educational Resource has been specifically designed to fit in with the Curriculum for Excellence, providing key learning points for pupils and new, innovative ways of teaching. The resource will be available online and mixes classroom activity with video and other multimedia, so it can be accessed at home and indeed by anyone around the world.*

Tom Watson had this to say about the education programme[6]:

> *This is a programme of practical application, and we need to do more things like this in the States. The skills they can pick up aren't only to do with The Ryder Cup or golf but can be used every day, so it's a good thing.*

Paul McGinley added the following[7]:

> *Sometimes as sports people we just come in and play our game then move on, so it's good to see something like this being left behind to help children in education and also hopefully give them an interest in golf too.*

Apart from the specific resource above, there was a concerted effort to engage young people using a number of Ryder Cup themed events including dance, arts exhibitions and visits to The Junior Ryder Cup. The resources also helped to deliver learning experiences in Perth & Kinross which included:

- Designing golf holes;
- Baking Ryder Cup cakes;
- Making a Ryder Cup recipe book;
- Visiting local golf clubs;
- Designing golf clothing;
- Writing poems and songs, and
- Planning and holding Ryder Cup celebratory events.

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5 From the official (Grayling) press release 24 Sept. 2013. *Ground-breaking Ryder Cup educational resource launched.*

6 From Daily Record 24/9/13, *Ryder Cup one year to go: Captains Paul McGinley and Tom Watson visit Auchterarder Primary School.*

7 *Ibid* 6

Moreover, the *ClubGolf*[8] initiative which was born out of the original staging agreement for The Ryder Cup received a boost amongst P5 pupils across 76 primary schools in Perth & Kinross. The initiative which helps to create a golf development pathway from entry level to the highest standards of golf, managed to concentrate efforts such that more than 1,500 pupils from Perth & Kinross attended coaching sessions linked to The Ryder Cup. The legacy being that a number of primary pupils now travel to Blairgowrie Golf club to take part in *ClubGolf* coaching on a regular basis. In addition, according to the Council, plans are afoot to develop The Blairgowrie Golf Legacy Project, which has ambitions to create a lasting social, economic and sporting legacy on the back of the Junior Ryder Cup held at Blairgowrie in September 2014; the first time (in Europe) that this event had been played in the same country alongside The Ryder Cup.

In addition to the education initiatives described above, in 2013 some 12 students from Scottish Universities and Colleges received 5-year bursaries from Ryder Cup Europe for courses which reflect the wider tourism, hospitality and management aspects of the event and which will allow them to benefit from their associations with The Ryder Cup. Moreover, the Observer Programme run by EventScotland took place at the beginning of Ryder Cup week; this included a variety of presentations by event partners about numerous aspects of event delivery including environmental management and event impact evaluations.

6.4. Influence on Golf Events in Scotland

According to Scottish partners and Ryder Cup Europe the decision to award The Ryder Cup to Scotland has had an historic influence on the number of professional golf events being hosted in Scotland. According to data provided by EventScotland some 55 events have been staged on Scottish soil since the event was originally awarded to Scotland as part of The Ryder Cup Tournament Investment Programme. Whilst it is beyond the scope of this project to estimate the likely impact of these events, it is reasonable to assume that Scotland has benefitted from both a financial and public profile perspective. These events, held throughout the country, have helped to market Scotland as *The Home of Golf* to global and domestic audiences as well as bringing economic benefits to a number of areas, some of which had not previously held major international golf events. The most high profile of these, the Aberdeen Asset Management Scottish Open, is estimated to generate in the region of £5m[9] in economic impact for Scotland per annum.

Some of the rights fee paid to attract The Ryder Cup will continue to support events in Scotland for the next four years and such events may well generate their own economic impacts. By way of an example in November 2014 it was announced that a new European Tour event, the *Saltire Energy Paul Lawrie Match Play* will be held in Aberdeenshire in July 2015. In the year post Ryder Cup, this will be the fourth full European Tour event to be held in Scotland (along with The Open, The Scottish Open and Alfred Dunhill Links Championship; more than any other country in Europe) which, coupled with ladies (Ricoh Women's Open), seniors and lower tier events all serve to further reinforce the *Scotland, The Home of Golf* message.

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8 This junior golf initiative has introduced more than 350,000 children to the sport at school. In 2014 the Scottish Government extended *ClubGolf* and committed another £1m over 4 years in *Get into Golf,* to introduce more young people to the sport and encourage family participation.

9 Source: *Economic impact study on The 2011 Scottish Open at Castle Stuart*, EventScotland.

7. CONCLUSIONS

This report has presented the findings from a programme of research linked to Scotland hosting The Ryder Cup in 2014, which has succeeded in quantifying the often hidden economic impacts associated with major sport events of this type. In addition, apart from the economic impact elements of the project, it has also delivered information which will help future editions of The Ryder Cup as and when they are held on European soil; many of which are derived from the detailed satisfaction and perceptions analyses undertaken amongst spectators.

The research reveals that the 40th Ryder Cup hosted in Scotland delivered the following outcomes.

- Economic activity in Scotland estimated at **£106.1m** of, which included an economic impact of **£41.1m** (in new money) for Scotland (including direct, indirect and induced effects), which in turn supported **619 FTE** jobs.
- Around 62,000 spectators visited Scotland specifically for The Ryder Cup and of these almost 11,000 were on an extended stay either pre or post event.
- **£22m** of economic activity in Perth & Kinross; this included an economic impact of **£19.4m**, which was in part a function of the spending by an estimated 103,000 spectators who visited the region specifically to watch The Ryder Cup.
- A direct impact for the UK as a whole of **£46.7m** (including the event surplus but excluding any indirect and induced effects) which include the spending of an estimated 23,000 spectators visiting the UK specifically to attend The Ryder Cup.
- Notional value from media coverage of The Ryder Cup brand of £42.2m and £11.3m for Scotland and its brands.
- Scotland and its brands received more than 416 hours of global exposure on-screen during live TV and highlights packages.
- Up-skilling and invaluable experiences reflected in the consultations with volunteers will leave a legacy for future golf championships and other major events in Scotland.
- A voluntary time contribution of almost 100,000 hours estimated at more than £1m.
- Inspirational effects were reflected in the 68% of visitors who intended to return to Scotland within a year for a break/leisure; whilst half of spectators suggested that The Ryder Cup had inspired them to take up/play more golf.
- The Green Drive initiative succeeded in sending zero waste to landfill by salvaging materials from temporary event structures for use at other events or for charities to use. Temporary energy suppliers delivered a reliable, low carbon power solution; whilst two-thirds of spectators were aware of the recycling points around Gleneagles. These and other measures represent benchmarks upon which future golf events can build.
- Support for the delivery of 55 golf events on Scottish soil over the last decade since Gleneagles was awarded The Ryder Cup.
- An improved golf development pathway for young people in Scotland and Ryder Cup themed education resources to engage young people in Perth & Kinross.
- Proof (not that any was needed) that Ryder Cup Europe and Scotland could deliver an iconic event, in a mainly rural community and overcome the logistical issues it faced, such that Gleneagles 2014 was described as *the best-organised Ryder Cup ever* by Butch Harmon on Sky Sports.

The task now for ongoing monitoring and evaluation of tourism in Scotland is to try and establish whether the extensive media exposure and intentions to return expressed by spectators are reflected in any changes in tourist statistics and behaviour.

For The Ryder Cup as an event and the organisers in Europe, the future looks bright given that the event surplus will be put towards future European Tour events and because there appears to be the will amongst spectators to commit to future editions given the unique nature of the contest between the two teams. The event rights holders should have every confidence in their ability to attract potential future venues to bid for The Ryder Cup, which, as the sport in its purest form, remains an integral part of golf's great appeal, as illustrated by the following comment by one observer:

> *This is amazing; the atmosphere is unlike any other major golf event I have ever attended. The tribalism makes the hairs on the back of my neck stand on end. It's like golf meets football.*

The Ryder Cup's legacy will be another chapter in Scotland's rich golfing heritage and yet another boost to its *Scotland, The Home of Golf* brand. Furthermore, the way in which Scotland, its regions, its businesses, its volunteers and its people continue to support golf and take pride in the events hosted on Scottish soil, coupled with the positive perceptions expressed by visitors from around the world, augurs well for the future.

Ultimately, an event that was responsible for more than £106m of economic activity in Scotland, of which some £41m was new money to the Scottish economy, is testament to the time and resources committed to delivering such a memorable sporting spectacle and vindicates the decision to bring the event back to Scotland for the first time in more than 40 years.

Richard Coleman
Girish Ramchandani
19th March 2015

APPENDIX A: AT-EVENT SPECTATOR SURVEY

THE 2014 RYDER CUP, Gleneagles, 22-29 Sept

GLENEAGLES SCOTLAND 2014

Sheffield Hallam University's Sport Industry Research Centre has been commissioned to assess the economic impact of The 2014 Ryder Cup.

We would be grateful if you could spare a couple of minutes to complete this questionnaire. Please CROSS where required or write your answers in the spaces provided. Where you are asked about Perth & Kinross refer to the map on the back of the clipboard.

Are you? ☐ Male ☐ Female **How old are you?** ☐☐

Including you, how many people are in your group at Gleneagles? ☐☐ Adults ☐☐ Children (under 16)

1. **From 22-28 September, how many of the seven days of The 2014 Ryder Cup in Perth & Kinross are you attending?** ☐☐ Days

2. **Which of the following best describes where you live?**
   ☐ Perth & Kinross ☐ Stirling ☐ Dundee ☐ Edinburgh ☐ Glasgow
   ☐ Rest of Scotland ☐ England ☐ Wales ☐ Elsewhere in UK ☐ Overseas

3. **UK residents please provide your FULL postcode. Overseas residents please state the country in which you live.**
   ☐☐☐☐ - ☐☐☐ **or** ____________________

4. **Which one of the following are you?**
   ☐ Spectator ☐ Media personnel *(go to q.6)* ☐ Official *(go to q.6)* ☐ Volunteer *(go to q.6)*
   ☐ Sponsor/guest *(go to q.6)* ☐ Contractor *(go to q.6)* ☐ Other *(Please specify and go to q.6)* ____________________

5a. **Which of these previous editions of The Ryder Cup did you attend?** *(Mark all that apply)*
   ☐ 2012 Medinah ☐ 2010 Celtic Manor ☐ 2008 Valhalla ☐ 2006 The K Club

5b. **Which of these previous editions of The Ryder Cup did you watch on television?** *(Mark all that apply)*
   ☐ 2012 Medinah ☐ 2010 Celtic Manor ☐ 2008 Valhalla ☐ 2006 The K Club

6. **Had you not been at The 2014 Ryder Cup, what would you probably be doing today instead?**
   ☐ I would have stayed at home/gone to work ☐ I'd have done something else in Perth & Kinross
   ☐ I'd have done something else outside Perth & Kinross ☐ Don't know

7. **Does your trip to The 2014 Ryder Cup involve staying overnight away from home?** ☐ Yes ☐ No *(go to q.10)*

8. **Where are you staying, for how long, with how many people and at what cost (if any) for the accommodation per night? Please break down your trip to during The Ryder Cup & any extended stay either before or afterwards.**
   If you are not paying for accommodation but are staying with friends/family mark the box in column (d); if you are switching between paid & unpaid accommodation please reduce the average cost per night. *(Refer to the map on the back of the clipboard if required)*

From 22nd to 28th September	a. Nights	b. People	c. Total cost per night		d. Staying at friends / family
In Perth & Kinross	☐	☐☐	£ ☐☐☐	or	☐
In rest of Scotland	☐	☐☐	£ ☐☐☐	or	☐
In rest of UK	☐	☐☐	£ ☐☐☐	or	☐

Before 22nd or after 28th September	a. Nights	b. People	c. Total cost per night		d. Staying at friends / family
In Perth & Kinross	☐☐	☐☐	£ ☐☐☐	or	☐
In rest of Scotland	☐☐	☐☐	£ ☐☐☐	or	☐
In rest of UK	☐☐	☐☐	£ ☐☐☐	or	☐

9. **If you are staying away from home in Scotland outside Perth & Kinross, is this...?** *(Please refer to the map on the back of this clipboard)*
   ☐ in Stirling ☐ in Dundee ☐ in Edinburgh ☐ in Glasgow ☐ Elsewhere in Scotland

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v11 **Please turn over...**

10. Using the same time periods in Q8, how much on average (to the nearest £), do you expect to spend per day of your trip on the following items in the locations stated? *(See map on the back of the clipboard if required)*

From 22nd to 28th September	Perth & Kinross	Rest of Scotland	Before 22nd or after 28th September	Perth & Kinross	Rest of Scotland
Food and Drink *(not in accommodation costs)*	£	£	Food and Drink *(not in accommodation costs)*	£	£
Merchandise/Programmes	£	£	Merchandise/Programmes	£	£
Shopping/Souvenirs	£	£	Shopping/Souvenirs	£	£
Entertainment/Attractions *(excluding green fees)*	£	£	Entertainment/Attractions *(excluding green fees)*	£	£
Travel/Transport *(including car rental)*	£	£	Travel/Transport *(including car rental)*	£	£
Other *(e.g. parking)*	£	£	Other *(e.g. parking)*	£	£

11. INCLUDING YOURSELF, how many people is this expenditure for?

12. In total, how much will you (& your party in q.10) spend on green fees during your trip?

In Perth & Kinross £ In the rest of Scotland £

13. How satisfied are you with your overall experience at The 2014 Ryder Cup?

☐ Very satisfied ☐ Satisfied ☐ Dissatisfied ☐ Very dissatisfied ☐ Don't know

If you LIVE IN PERTH & KINROSS, thank you for your help so far, please continue at Q20.

If you LIVE OUTSIDE PERTH & KINROSS, please continue and answer all of the remaining questions.

14. Which of the following best describes the MAIN REASON for you being here today in Perth & Kinross?

☐ I am here specifically to attend The 2014 Ryder Cup

☐ Other ***(Please specify)*** ______

15. Have you visited or do you plan to visit other parts of the UK (outside Scotland) during your trip?

☐ Yes ☐ No ***(Go to q.18)***

16. How many additional days will you spend visiting other parts of the UK (outside Scotland)?

17. And excluding accommodation how much have you spent, or do you expect to spend in the rest of the UK (i.e. outside Scotland) on this trip? £

18. Based on your experiences during this trip, how likely are you to return to Perth & Kinross for a short break or for leisure in the next year?

☐ Very likely ☐ Likely ☐ Unlikely ☐ Very unlikely ☐ Don't know

19. And if you live outside Scotland, how likely are you to return to any part of Scotland in the next year for a short break or for leisure?

☐ Very likely ☐ Likely ☐ Unlikely ☐ Very unlikely ☐ Don't know

20. Are you aware of Homecoming Scotland 2014? ☐ Yes ***(Go to q.21)*** ☐ No ***(Go to end)***

21. Have you attended or do you anticipate attending any Homecoming Scotland 2014 Events? ☐ Yes ☐ No ☐ Don't know

A researcher will be along shortly to collect your completed form.
THANK YOU FOR TAKING PART IN THIS RESEARCH AND HAVE A GREAT DAY.

Scotland The Home of Golf

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Office use only: ☐ 22nd ☐ 23rd ☐ 24th ☐ 25th ☐ 26th ☐ 27th ☐ 28th

APPENDIX B: SPECTATOR DEMOGRAPHICS

	Percentage
Gender	
Male	72.8%
Female	27.2%
Age (Average = 48.5)	
16-19	0.5%
20-24	2.0%
25-34	14.3%
35-44	21.8%
45-54	25.9%
55-64	24.2%
65-74	10.5%
75+	0.8%
Ethnic origin	
White	98.4%
BME	1.6%
Live	
Perth & Kinross	4.3%
Stirling	4.1%
Dundee	1.8%
Edinburgh	8.2%
Glasgow	10.9%
Rest of Scotland	13.6%
England	28.7%
Wales	1.0%
Elsewhere in UK	5.5%
Rest of World	21.9%

Country	% all spectators (n = 8419)	% of ROW (n = 1315)
USA	4.88%	31.25%
Ireland	1.84%	11.79%
Germany	1.40%	8.97%
Canada	1.38%	8.82%
Netherlands	0.96%	6.16%
Australia	0.44%	2.81%
France	0.42%	2.66%
Sweden	0.40%	2.59%
Spain	0.38%	2.43%
Italy	0.37%	2.36%
South Africa	0.36%	2.28%
Denmark	0.32%	2.05%
Switzerland	0.30%	1.90%
UAE	0.20%	1.29%
Austria	0.19%	1.22%
Finland	0.19%	1.22%
New Zealand	0.19%	1.22%
Norway	0.18%	1.14%
Channel Islands	0.14%	0.91%
Hong Kong	0.14%	0.91%
Belgium	0.12%	0.76%
Portugal	0.10%	0.61%
Luxemburg	0.05%	0.30%
Qatar	0.05%	0.30%
Singapore	0.05%	0.30%
Other	3.70%	0.58%

APPENDIX C: SPECTATOR COMMENTS FROM THE ONLINE SURVEY

The Experience

More than a third of the responses from spectators (34%, n=1,141) commented on the quality of their Ryder Cup experience, with people describing this as amazing or wonderful. Typical comments included the following examples.

It was an amazing experience that outshone any previous major sporting events I have attended including the Commonwealth Games this year. It was a once in a lifetime experience and a superbly organised event.

It was simply amazing. The best sporting event experience of my life by far.

One of the highlights was the lone piper piping us from Gleneagles Station into the course. It set the tone for a wonderful day.

This was the first Ryder Cup my partner and I had been to! He's golf mad & thoroughly enjoyed it & for me from my non-golf [background], I thought it was amazing! We are even considering volunteering for Ryder Cup events. Thanks to everyone involved for an amazing experience never to be forgotten.

An unbelievable experience that all associated with The 2014 Ryder Cup should be proud of.

The Organisation

Some 13% (n=422) of the responses made reference to how well organised they felt The Ryder Cup was, as illustrated in the following examples.

Everything about The Ryder Cup was operated to an exceptionally high standard. You exceeded my expectations through great organisation, planning and delivery. Thank you - it has definitely encouraged me to attend future Ryder Cup events.

Extremely well done. Course immaculate. Crowd-friendly. All in all the organisers should be very proud of themselves for their organisation. All volunteers which I came across were very helpful and friendly and most seemed proud of what they were doing.

Having been to three Open Championships and two Wimbledon Finals, this was by far the best organised sporting event I have been to. The smooth and hassle free entry and exits to and from Park & Rides and the course and marshalling were superb and greatly enhanced our experience.

The Ryder Cup must return to Gleneagles in the future. Saw so much more than at The Belfry and Celtic Manor. A very memorable experience - well planned.

Quite simply I was part of history at an awe inspiring major sport event on my doorstep - a huge well done to all the organisational staff - you did Scotland proud and showed that we can deliver to the world!

The Staff and Volunteers

Spectator comments also revealed fulsome praise for event staff and volunteers with some 7% (n=238) making reference to their excellence.

The greetings from all personnel at the course, park & ride, security, everyone [were] second to none. From the welcome in the morning to the "safe journey home" in the evening was exceptional. Even after long days they kept smiling. They made a wonderful experience exceptional.

The voluntary staff were amazing, extremely welcoming and provided an immediate 'feel-good' factor each day!

The stewards on the course were polite and extremely helpful in guiding us to [the] best areas to view the golf.

A word about all volunteers who were fantastically friendly and helpful, this must be down to the training they were given as it was a highlight for me.

The Venue

Gleneagles also received praise as an excellent venue to host such a prestigious event with some 6% (n=185) of responses related to this theme.

> *Gleneagles was one of the best viewing courses I have been to, due to the hills and mounds around the fairways and greens. Also the condition of the course was first class.*
>
> *I had a fantastic time. The course was beautiful with dramatic backdrops of the Glens. The organisation and infrastructure was excellent. Gleneagles should be used as a blueprint on how to manage a golf tournament. Well done.*
>
> *The Ryder Cup must return to Gleneagles in the future.*
>
> *Gleneagles was the reason why I enjoyed the event so much, the natural lie of the land made for great viewing which allowed all spectators to see the golf and create the wonderful atmosphere which we experienced. I hope the future venues can have the same effect as Gleneagles.*

As with any major event there were some negative comments and we include a selection herein as points of note for future editions of the event, though we accept it is impossible to please all of the people, all of the time, and that respondents are more likely to complain than praise when they are given an opportunity.

Toilet Facilities

Comments linked to a lack of, and poor quality, toilet facilities was a recurring theme with 18% (n=596) of the responses in this area.

> *[The] toilet and catering facilities were wholly inadequate for the number of people attending. Having paid £150, I wanted to watch golf not spend hours queuing for food or toilets.*
>
> *Both my wife and I thought toilet facilities were very poor. Huge queues and if we were out on [the] course often the nearest [toilet] was some distance away.*
>
> *Generally very well organised however by 9:00am a lot of [the] portable toilets were unusable & there weren't enough on the course.*
>
> *Not enough toilets, also toilets on [the] course were poorly maintained.*

Unsatisfactory Catering

Although less contentious than the comments about the toilets, the cost and quality of event catering is a popular gripe at many major events and The Ryder Cup was no different with some 10% (n=324) of the responses on the subject.

> *I could not fault the [Ryder Cup] experience except for the expensive food on the course.*
>
> *Food on the course was overpriced and not great value for money.*
>
> *Fantastic event - let down by very poor, overpriced catering with little choice and long queues.*
>
> *Very disappointed that more distinctly Scottish products, especially food and drink, were not showcased at the event.*

Transport Issues

Despite the responses to the closed questions reported above about transport and the park & rides, some 8% (n=253) of the responses referred to problems with transport and journeys to The Ryder Cup.

ScotRail let down spectators returning to Edinburgh on the Saturday evening as trains on [the] timetable did not arrive. After waiting over an hour we were eventually squeezed on to a train & the journey time was a further 90 min.

After paying up front for our train tickets thinking we would have a seat on trains which were laid on especially for the event we found full cramped trains and no seats available.

Not enough trains to get back to Dundee after the event. They should have put on extra services; we had to miss the closing ceremony to catch the train home.

The later trains from Edinburgh to Gleneagles didn't allow sufficient time for spectators to get through the security checks at Gleneagles station before the start of play. The 'lanes' were poorly managed and allowed spectators with bags to go through the 'no bag' lanes without challenge.

We stayed in Auchterarder. There should have been an option to walk to the course from Auchterarder.

No one could enter the course unless they arrived on the bus. I had to flag down a bus 5 metres from the entrance and then get off seconds later. Could there not have been an entrance for people walking from the local area.

Technology Issues

Some 6% (n=193) of the responses referred to technological issues experienced by spectators at The Ryder Cup.

The Ryder Cup official smartphone app was a serious disappointment. Poor design, not up to the standards of other major golf event apps. The Wi-Fi signal quality on the course at Gleneagles was not very good.

Only disappointment was inconsistent and inadequate Wi-Fi on the course. [I was] unable to make full use of The Ryder Cup App.

The official Ryder Cup mobile phone app was poor at best - too slow and focussed on providing content that it wasn't able to run quickly, a simple live scoreboard would have been brilliant.

Thought the RFID wristbands were pretty much a waste of time. I expected more from them due to advance information within the ticket wallet which raised expectations.

The big screens did not tell us the accurate location of the players and they were not updated correctly to tell us where the players were. We did not have a smart phone to use. The whole experience would have been better for people with up to date information to follow.

The Ryder Cup App and wristbands were marketed heavily in advance. However, I am not aware what if any benefits the wristband gave me. Also the App was constantly difficult to update as the wireless coverage was very poor.