

# SCOTTSDALE GOLF



## Golf Market Consumer Assessment Research

September 2013

Prepared for:



Prepared by:





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## Background and Objectives

- Gain a deeper understanding of the perceptions and attitudes of local and out of market golfers towards Scottsdale's current golf offerings
- Determine the market's strengths and weaknesses relative to its competitive set of golf destinations, and gauge gaps in understanding and association
- Optimize advertising and marketing effectiveness and be responsive to the needs of current and lapsed visitors

## Methodology and Sample Frame

### On-line Surveys:

- Total of 675 completed surveys conducted June-August, 2013
- National and local sample culled from the golfer databases of 14 participating Scottsdale golf facilities. Sample balanced and quoted to replicate representative distribution of facility specific customer files.

- Participating facilities:

Camelback Golf Club

McCormick Ranch Golf Club

The Phoenician Golf Club

Eagle Mountain Golf Club

McDowell Mountain Golf Club

TPC Scottsdale

Grayhawk Golf Club

SunRidge Canyon Golf Club

Troon North Golf Club

Kierland Golf Club

Talking Stick Golf Club

We-Ko-Pa Golf Club

Legend Trail Golf Club

The Boulders Golf Club

- All respondents required to indicate regular participation in both golf and travel to qualify
- 88% Male; 12% Female

# Two Minute-Take-Aways and Bottom Line Recommendations

## HEADLINES AND IMPLICATIONS

Scottsdale enjoys exceptionally strong equity among both local resident golfers and out of market past guests. When asked to associate competitive destinations against an extensive set of attributes, the region outperformed all competitors across nearly every positive metric.

### Scottsdale Golf Strengths

- High Quality Golf
- Great Weather
- Fine Dining
- Luxury Accommodations

### Scottsdale Golf Weakness:

- Perceived as pricey

### Competitive set Weakness:

- Hawaii—Perceived as more expensive and inconvenient to get to
- Palm Springs—Value disadvantage and less non golf amenities
- Las Vegas---Perceived as more expensive with a less desirable clientele
- Pebble Beach---More of a 'once in a lifetime' destination

## Two Minute-Take-Aways and Bottom Line Recommendations

### GENERAL AND GOLF SPECIFIC TRAVEL HABITS OF NOTE

- Golfers travel frequently for both business and pleasure and recent trends show that the oldest and youngest sub groups are traveling the most. Results also show an uptick in recent air travel and an expectation for increased travel in the future.
- Online Sources, golf publications, friends and previous experiences are the most critical information sources for planning golf vacations.
- Quality of accommodations, weather conditions and value perceptions are key drivers of the vacation destination decision.
- Unique to past Scottsdale visitors, is the resonance of the destination's scenic beauty in compelling visitation to the area.
- The availability of quality, readily accessible golf, swimming pool amenities and ample dining options are also critical for golf specific trips.
- Tend to book online.
- Beyond Arizona, recent favorite vacation destinations have a distinctly western focus and include Las Vegas, Palm Springs and Hawaii.
- The greater propensity of target visitors have flown to their most recent golf vacation.



## Two Minute-Take-Aways and Bottom Line Recommendations

### SCOTTSDALE VISITOR PROFILES:

	Scottsdale Golf Visitor Profile	Average Scottsdale Visitor Profile*
Married	83%	84%
Presence of children in household	25%	51%
Employed full time	63%	Unknown
Average booking window	1-3 months	37 days
Average party size	3.5	2.7
# of 18-hole golf rounds played on avg per vacation	6	Unknown
HHI	\$220,000	\$100,000
Length of stay	7 days	5.9 days
Average spending	\$1,800 (50% higher than luxury visitor)	\$1,193

\*Research sources: 2011 VICA Study and 2013 COS Visitor Inquiry Study

## Two Minute-Take-Aways and Bottom Line Recommendations

### **MORE ON DESTINATION FAMILIARITY AND PERCEPTIONS**

- Key competitive set western destinations are familiar to all.
- Visitation intent for Scottsdale among past guests tops all competitive destinations. The following segments show greater intent relative to the rest of the respondent base:
  - Recent Visitors
  - Most active vacation travelers
  - Most active golf travelers
  - Age 35-44
  - Highest income travelers
  - Highest vacation spenders



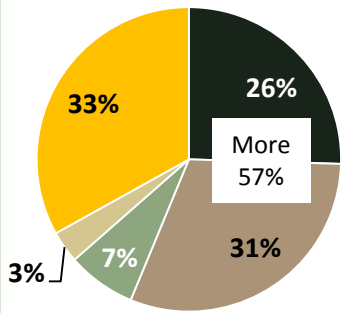
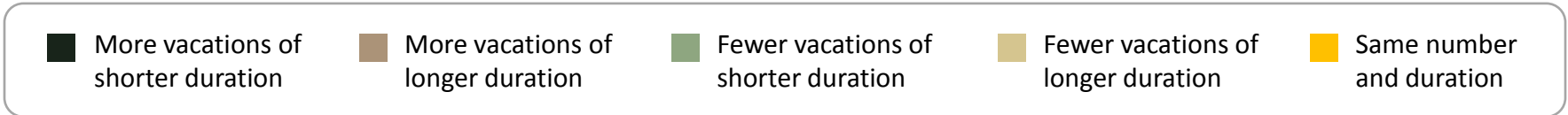
## Two Minute-Take-Aways and Bottom Line Recommendations

### **MORE ON DESTINATION FAMILIARITY AND PERCEPTIONS** (continued)

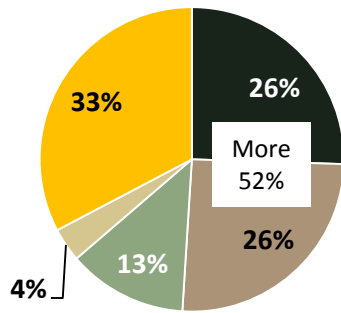
- Phoenix and Hawaii emerge as those competitors most perceived to also offer great golf and great value.
  - While Scottsdale is top or near top of the charts across these key metrics, the value proposition is less convincing, with Phoenix outpacing Scottsdale
  - Concurrently, Scottsdale exhibits a distinct value advantage over quality differentiated competitors like Pebble Beach, Hawaii and even Las Vegas
- Primary objections, though minimal, revolve around cost concerns. While Scottsdale perceptions are still relatively more favorable around this metric than for others in the immediate competitive set, it's worth noting that the destination is still perceived to be pricey. That said, universal embracement of the destinations ample quality golf courses, weather, accessibility and other amenities position it well against destination competitors like Hawaii, Palm Springs, Las Vegas and Pebble Beach.
- A look at target visitor demographics, golf habits and desired non-golf vacation amenities, suggests secondary communications emphasis on available dining options, local sporting events (Spring Training?) and other outdoor activities like hiking and cycling.

# Optimism in the Air: Golfers Planning More Golf Vacations vs Five Years Ago

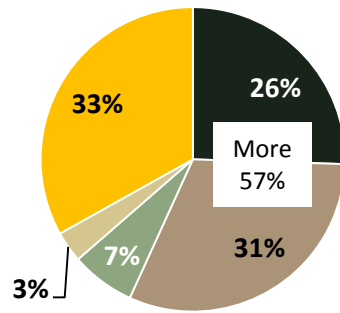
**Q** Compared to 5 years ago, would you say you are planning...?



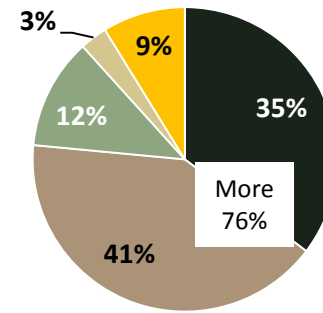
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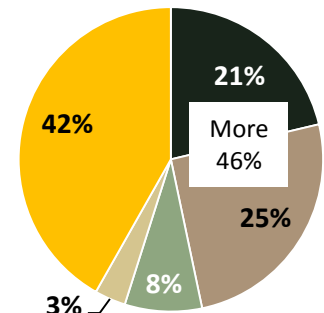
**Local Market**



**Other Metros**



**Age <35**



**Age 65+**

## Key Definitions

- **Local Market:** respondents from the Scottsdale area
- **Other Metros:** Out of state visitors
- **Most Active Golf Travelers:** The top 1/3 of golf travelers, averaging a median of 3 golf trips annually
- **Recent Scottsdale Visitors:** Have visited the market and played golf within the past 24 months.
- **Core Golfer:** Has played between 8+ rounds of golf within the past year
- **Avid Golfer:** Has played 25+ rounds of golf within the past year



## The Planning Process—Online Sources, Golf Publications, Friends and Previous Experiences are Most Critical Information Sources for Golf Vacations

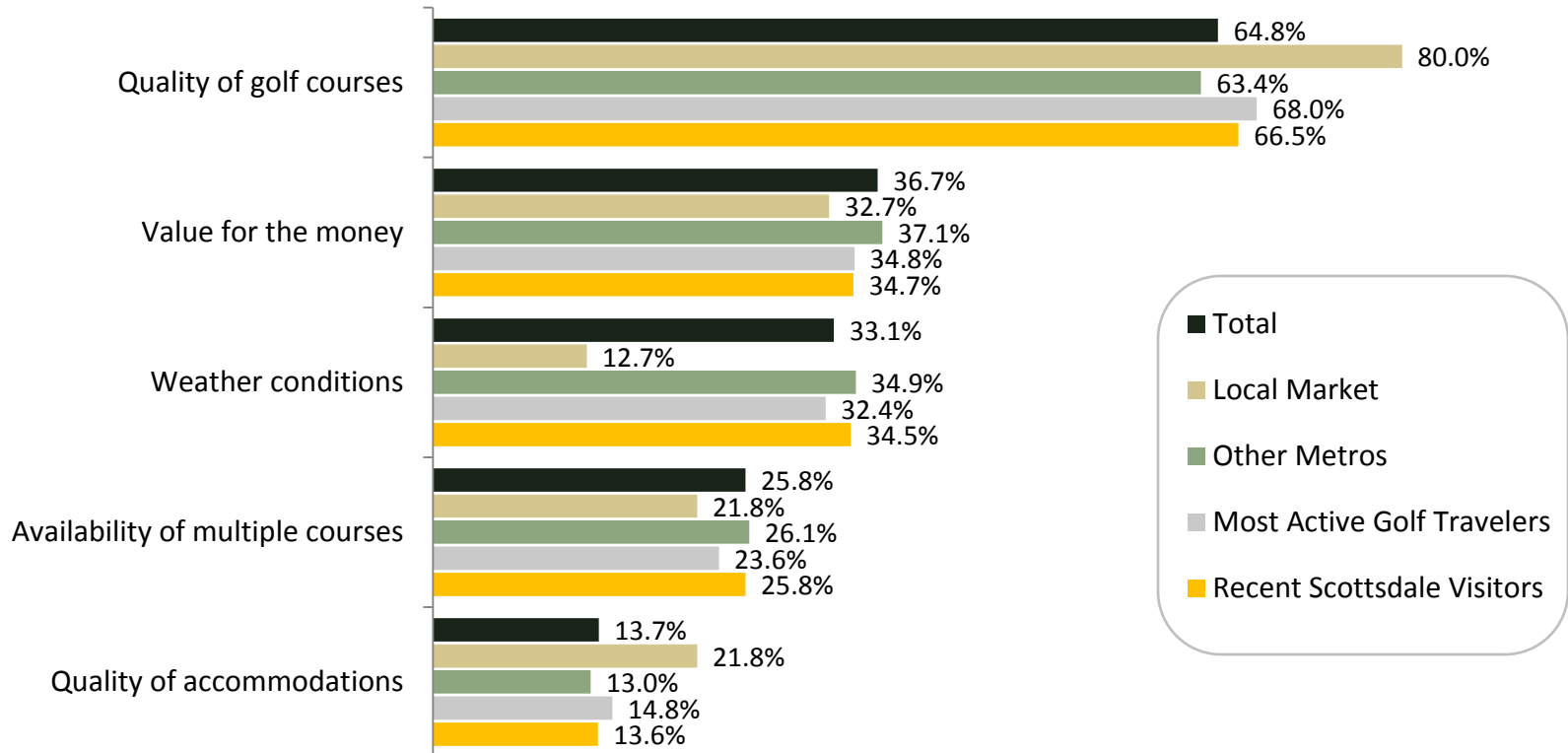
**Q** *When gathering information about planning a typical golf vacation trip, which two of the following are the most important sources you use?*

	Total	Local Market	Other Metros	Most Active Golf Travelers	Recent Scottsdale Visitors
Internet	81.4%	83.6%	81.2%	81.2%	81.6%
Previous experiences	39.9%	36.4%	40.3%	41.6%	40.0%
Golf publications	31.6%	27.3%	31.9%	32.8%	31.3%
Other golfers	30.8%	41.8%	29.8%	30.0%	31.4%
Destination brochures	9.5%	3.6%	10.0%	8.8%	8.6%
Golf pros	2.4%	1.8%	2.5%	3.6%	2.7%
Mobile apps	1.7%	1.8%	1.7%	1.6%	1.5%
Travel agency/agents	1.4%	1.8%	1.3%	0.4%	1.4%
Other publications	1.4%	1.8%	1.3%	-	1.4%



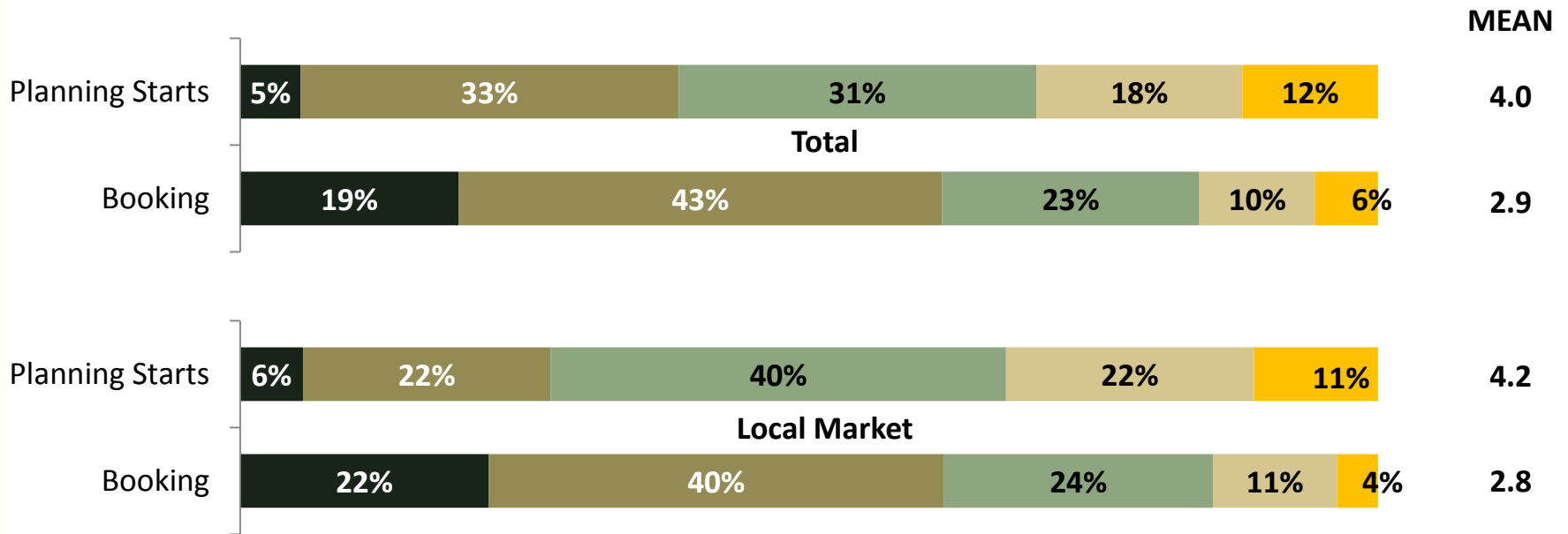
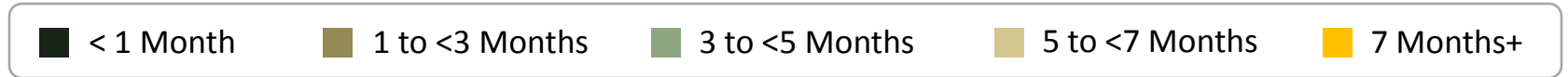
# The Planning Process—For Golf Specific Vacations It’s all about Golf Course Quality, Value, Weather and Variety

**Q** When deciding where to take a golf vacation trip, which two of the following are the most important deciding factors?



## The Planning Cycle : One to Three Months Out for Most

➤ A shift back to longer booking windows!



## Golfers Spent Around \$1,800 Per Person On Their Most Recent Golf Trip

**Q** How much did you personally spent on your most recent golf vacation? (Median Spend)

MEDIAN AMOUNT	Total	Local Markets	Other Metros	Most Active Golf Trav	Recent Scotts. Visitor	Core Golfers	Avid Golfers	Under \$75K	\$150K Plus
Lodging	\$400	\$500	\$400	\$400	\$400	\$400	\$400	\$200	\$500
Transportation	\$490	\$500	\$475	\$500	\$500	\$487	\$500	\$300	\$650
Green fees	\$350	\$300	\$350	\$400	\$400	\$350	\$400	\$250	\$450
Entertainment	\$101	\$80	\$101	\$170	\$123	\$101	\$101	\$50	\$170
Food and beverages	\$300	\$300	\$300	\$400	\$300	\$300	\$300	\$200	\$400
<b>TOTAL</b>	<b>\$1,823</b>	<b>\$1,800</b>	<b>\$1,824</b>	<b>\$2,000</b>	<b>\$1,850</b>	<b>\$1,830</b>	<b>\$1,913</b>	<b>\$1,250</b>	<b>\$2,300</b>
<b>% Spend higher than Avg. Scottsdale Visitor</b>	<b>53%</b>	<b>51%</b>	<b>53%</b>	<b>68%</b>	<b>55%</b>	<b>53%</b>	<b>60%</b>	<b>5%</b>	<b>93%</b>

Note: A typical Scottsdale visitor stays on average 5.8 nights and spends \$205.74 per day which totals \$1,193 for a standard Scottsdale vacation (City of Scottsdale Visitor Statistics Report, Aug. 2013)

## Most Popular Non-Golf Vacation Activities Suggest Amenities to Promote

Activities Participated In During Most Recent Vacation	Total	Other Metro Markets	Most Active Golf Travelers	Recent Scottsdale Visitors	High Vacation Spending
Golf	100.0%	19.7%	21.6%	20.6%	20.8%
Fine dining/culinary or wine activities	48.5%	20.8%	24.2%	21.3%	25.0%
Shopping	46.1%	23.6%	24.7%	23.7%	23.1%
Visited family & friends	36.2%	26.4%	26.8%	26.5%	27.4%
Visited museums or historical sites or Historic/heritage-focused activities	27.4%	27.4%	28.1%	26.7%	32.1%
Outdoor/nature-based activities	26.4%	36.2%	36.8%	36.5%	31.6%
Gambling	23.6%	46.1%	47.6%	45.6%	54.2%
Hiking	20.8%	48.5%	51.1%	49.5%	59.0%
Went to the Theatre/concerts, film festivals, or Arts/cultural activities	19.7%	100.0%	100.0%	100.0%	100.0%



## Most Popular Non-Golf Vacation Activities Suggest Amenities to Promote

Activities Participated In During Most Recent Vacation (continued)	Total	Other Metro Markets	Most Active Golf Travelers	Recent Scottsdale Visitors	High Vacation Spending
Visited theme/amusement parks	12.2%	12.2%	9.5%	11.9%	12.7%
Other water sports	10.9%	10.9%	13.9%	11.1%	13.2%
Fishing	9.4%	9.4%	10.0%	8.5%	7.5%
Organized tours	8.8%	8.8%	8.2%	8.3%	10.8%
Tennis	4.6%	4.6%	5.6%	4.5%	4.2%
Power boating	3.1%	3.1%	3.5%	3.0%	4.7%
Skiing	2.4%	2.4%	3.9%	2.6%	2.8%
Sailing	2.1%	2.1%	3.0%	2.0%	2.8%
Horseback Riding	1.8%	1.8%	0.9%	1.7%	1.4%

# Perceptual Sort Exercise Reveals “Like Competitors” Across Golf Quality

Respondents were asked to place each of 21 competitive Set Destinations into one of the following three categories for Quality of Golf:

- ❖ High Quality
- ❖ Medium Quality
- ❖ Low Quality

## Top 5 Destinations

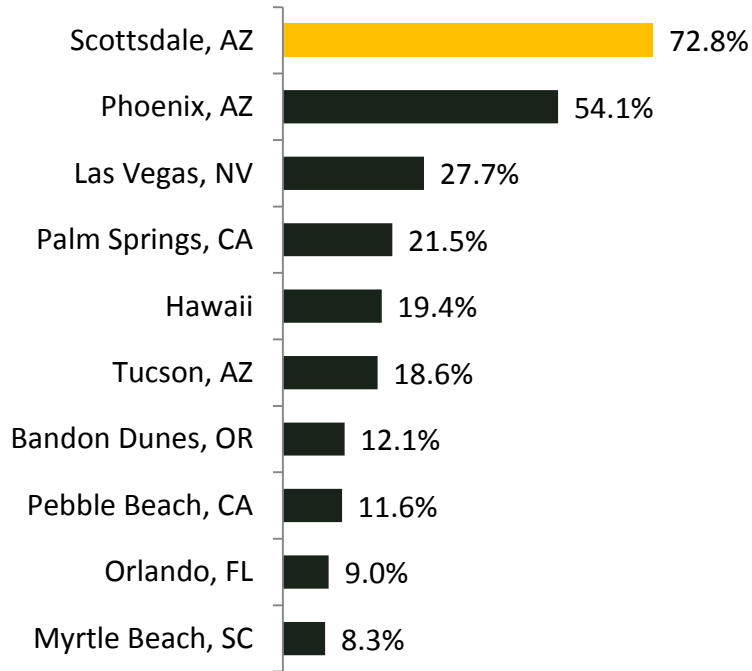
High Quality	Medium Quality	Low Quality
Scottsdale, AZ	Orlando, FL	Mexico
Pebble Beach, CA	Las Vegas, NV	Caribbean
Pinehurst/surrounding area, NC	Miami/Fort Lauderdale, FL	Miami/Fort Lauderdale, FL
Hawaii	Tucson, AZ	Jacksonville, FL
Bandon Dunes, OR	Jacksonville, FL	Orlando, FL

Base: Other Metro Markets

## Visitation Intent: Go West!

➤ Scottsdale leads the charge

**Q** Which are you planning to vacation at or play at in the next 12 months?



### Those Most Likely to indicate Scottsdale Visitation Intent:

Most Active Vacation Travelers – 81%

Recent Visitors – 80%

Most Active Golf Travelers – 80%

Age 35-44 – 80%

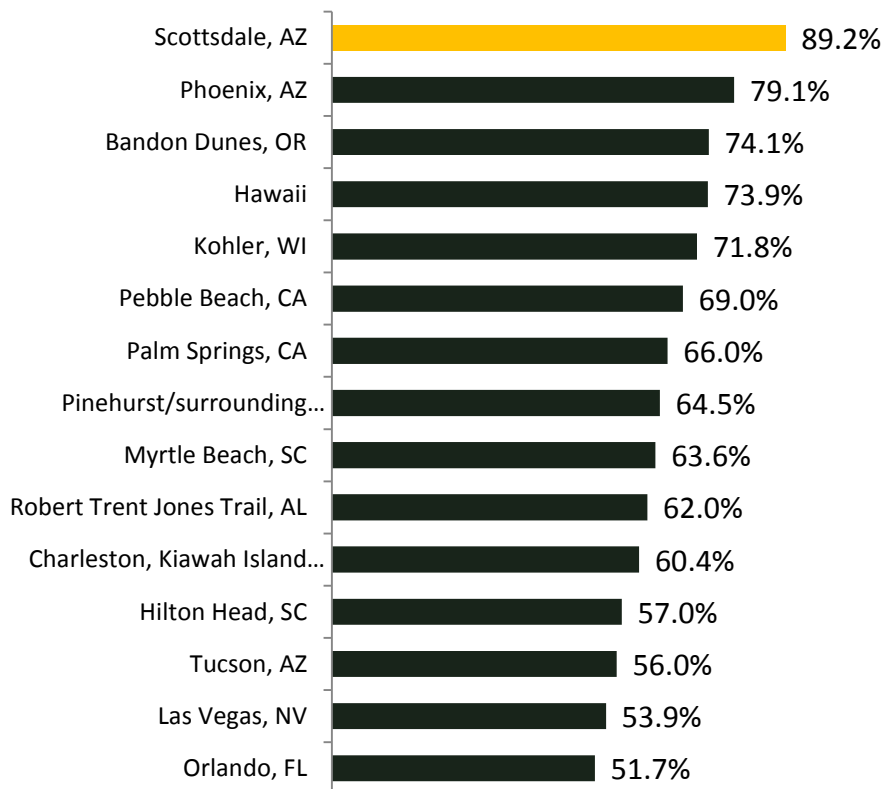
HHI \$150K+ – 79%

Highest Golf Vacation Spending – 78%

Base: Out of market respondents

## Another Look at Preference—Likelihood to Recommend a Destination

### TOP 3 BOX SUMMARY



#### Those Significantly More Likely to recommend Scottsdale:

Age 35+ —92%

Recent Scottsdale visitors—90%

High Golf Vacation Spending—90%

Avid Golfers—90%

HHI \$75k+—90%



## A Contextual Look: Destinations which “Own” Key Perceptual Attributes:

### ➤ Scottsdale Ranks #1 for following perceptual attributes

The people here are friendly, approachable and helpful

The service makes me feel special

Has great food

Has an abundance of dining options

Has high quality golf courses

Has well maintained golf courses

Has an abundance of golf courses that I can play

Offers golf courses with great scenery

Offers golf courses that are challenging, yet not intimidating

Offers great value for the money

Offers an easy way to book tee times

Has great weather for golf

Has quality accommodations

Has lots to do besides play golf

Is easy to get to

Offers the right variety of dining options

Offers a great entertainment value

Is for people like me

Lets me be myself

Good for couples

Good for retirees

Offers a kind of fun I want to be a part of

Offers something new and exciting

For affluent people

Affordable

Expensive

The available hotel accommodations provide a good value for the money

# Golfer Segments Prioritize their Needs in Different Ways

## Buddy

- Quality of golf courses
- Weather Conditions/Climate
- Availability of Tee times on Desired Courses
- Value for the money
- Bars/Nightlife



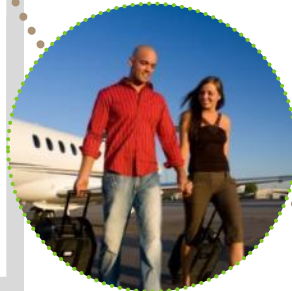
## Business

- Weather Conditions/Climate
- Quality of the golf course
- Quality of Accommodations
- Fine dining in the area
- Restaurants on site
- Pool



## Spouse/Partner

- Value for the money
- Availability of Tee times on Desired Courses
- Fine dining in the area
- Pool
- Restaurants on site
- Shopping



## Family

- Quality of golf courses
- Weather Conditions/Climate
- Value for the money
- Restaurants on site
- Pool
- Access to Beach/River
- Shopping



## Two Additional Trends in Sports Travel

- The value of an immersive sports experience
- A unique confluence of new and traditional media drives awareness and the travel planning process





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