



Scottsdale Golf Market Consumer Research: Executive Summary

September 2013

Project Overview

The Scottsdale Convention & Visitors Bureau engaged Sports & Leisure Research Group to conduct this research in order to gain a better understanding of the perceptions of current Scottsdale golf customers towards the destination, determine the market's strengths and weaknesses relative to its competitors, and optimize marketing efforts to best respond to the needs of these customers.

Customers from 14 Scottsdale golf facilities were contacted to participate in this study; 675 people completed the surveys. To qualify for the survey, respondents were required to meet some basic criteria, including regular participation in both golf and travel.

Key Findings

Scottsdale as a golf destination is well received by both local resident golfers and past visitors from outside the state.

Destination Strengths & Weaknesses

When asked to associate competitive destinations against an extensive set of attributes, the region outperformed all competitors across nearly every positive metric. Scottsdale's golf strengths include: high-quality golf, great weather, fine dining and luxury accommodations. The only weakness, according to customers, is that the destination is perceived as pricey. When compared directly to our strongest competitors, following are the other destinations' weaknesses:

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

Customer Travel Habits

Scottsdale's golf visitors are looking for quality and variety of golf courses, value for their money, good weather and quality accommodations. They are planning and booking their travels online; however, about half are still booking tee times by calling courses directly.

- Golf travelers are planning to travel more now compared to five years ago.
- Online sources, previous experiences, golf publications, and other golfers 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 also are critical for golf specific trips.
- Beyond Arizona, recent favorite vacation destinations have a distinctly western focus and include Las Vegas, Palm Springs and Hawaii.

Scottsdale Golf Visitor Profile

Scottsdale's golf visitor is an affluent customer that typically travels to Scottsdale with a group of friends and spends 50 percent more than the average Scottsdale visitor.

- Majority of Scottsdale golf visitors are married
- 58% with no children in the household
- 63% are employed full-time
- Have a mean household income of \$220,000
- Typically plans a golf trip one to three months out
- Tend to travel in groups of three or four
- Length of golf vacation averages one week
- Play six rounds of 18-hole golf on average per golf vacation
- Average spend per person: \$1,800 (50% higher than typical Scottsdale visitor)