



*Sports Marketing Surveys*

quality research for management action

# Tour Operators Research Summary

# Methodology

- » Sports Marketing Surveys interviewed 13 pre-selected Tour Operators at the end of October 2006.
  
- » The key topic areas included:
  - » Response to VisitScotland marketing initiatives.
  - » Feedback on co-operation from golf venues for golf visitor breaks.
  - » Types of people who come to Scotland for golf.
  - » Main types of golf breaks managed.
  - » Main locations from where golf tourists originate.
  - » Core elements of package
  - » Price levels.
  - » Options to enhance the quality of the break
  - » Areas for improvement and where help would be beneficial
  - » Where else visitors go (e.g. distilleries)
  - » Ryder Cup 2014 requests for information and awareness.
  
- » This document provides a high level summary of the findings.

# Tour Operators – Key Issues

## Growing Golf Tourism

- » Tour operators want to develop a closer working relationship with VisitScotland
  - » Need for active promotion of Scotland internationally
  - » FAM trips to discuss joint marketing initiatives.
  
- » Scotland cannot afford to solely rely on its reputation as the 'home of golf'.
  - » It is not enough to ensure repeat business.
  - » Scotland is no longer a once in a lifetime destination - what happens when tourists have played the signature courses?
  - » There is a need to promote lesser known golf courses and spread business around the country.
  
- » It does not negate the need to actively market Scotland as a destination
  - » There is a need to compete with other countries who aggressively market golf tourism.

# Tour Operators – Key Issues

## Issues for Tour Operators

- » The lack of commission and/or discounts at the majority of courses in Scotland makes it hard for Tour Operators to compete on cost.
  - » A key issue is the growing internet market for arranging golf breaks.
  - » VisitScotland was criticised for also enabling breaks to be organised on-line and therefore without Tour Operators being involved.
  
- » Belief that Scotland has fallen behind Eire and other markets in how they related to Tour Operators.
  
- » Older courses with private membership do not give the impression of being totally supportive of golf tourism.
  - » Trophy & Heritage courses can operate without Tour Operators and without any requirement to incentivise or encourage visits via discounts.

# Tour Operators

## The Changing Market

- » Tour operators primarily cater for affluent, male Americans. This market will remain strong.
- » There may be an increase in the short golf break market from Continental Europe if tourists are not inhibited by rising costs
  - » Promoting lesser known courses will help to balance cost issues
- » There may be an increase in the couples market from the USA and new opportunities for tourism from other long haul destinations (China, Australia)
- » Golf tourists are attracted to Scotland because of its heritage as the home of golf
  - » But there is a need to focus on ways of holding on to repeat business

## Ryder Cup

- » With the exception of The Open, golf events are not a huge draw for the tour operators' clientele.
- » Scotland will not be remembered for hosting a successful Ryder Cup but negative associations with the event will be remembered.
  - » Do not make the same mistakes as Ireland, particularly with regards to over-inflating prices.

# Tour Operators – 4 Key Issues

## 4 Key Issues

1. Scotland must proactively promote Scotland as a golf destination.
2. Scotland's golf tourism offering needs to focus on "exceptional service"
  - » Accommodation providers to golf courses.
3. Rising prices and no commission is the real threat to Scotland
4. Accessibility to the lesser known courses must be proactively promoted and marketed.