



# MORAY SPEYSIDE --- GOLF



## Target Market

- ◆ Predominately Male. However, 18% of European and 19% of Scottish visitors are Female.
- ◆ 70% of golf tourists to Scotland originate from the UK and Ireland and 30% from overseas
- ◆ Identified as five main customer groups:
  1. **Social golfer** - Most often like to take golfing breaks with groups of friends, where socialising and sharing time with them is as important as the golf experience
  2. **Luxury golfer** - Most often like to take golfing breaks to top class courses with luxury hotels to enjoy the best courses, facilities, accommodation and restaurants, and have an all-round first class experience
  3. **Holiday golfer** - Most often like to take golfing breaks as part of a holiday, which includes other activities and may be taken with family and friends who are not golfers
  4. **Competitive golfer** - Most often like to take golfing breaks to the most challenging and difficult courses in order to improve my game and compete with friends. The challenge of the course and the opportunity to compete with others (and myself) are paramount
- ◆ Cover most age demographic groups, however, 75% are over 45
- ◆ Socio economic group—AB classification (affluent) however, there is a continuously growing market for younger less affluent consumers within the UK
- ◆ USA dominate the current International market 30% with Germany and Sweden following at 14%.

## Market Behaviour

- ◆ Over 45 age group more likely to travel abroad for a golf break, under 30's more likely to stay within the UK
- ◆ Majority of visitors book at least 6 months in advance
- ◆ Potential visitors rely on word of mouth from Friends, Golf Professionals, Magazines and Review Sites when researching golf breaks.
- ◆ Golf magazines and Tour operators are considered the most important source for researching golf breaks. However, Visitors are also heavily influenced by online blogs and reviews, with 86% of visitors stating that they are more trusting of what fellow golfers say about a location than what tour operators and advertisers have to say.
- ◆ Important factors when choosing a destination were stated as being: Variety/selection of courses, Price, Inclusive packages, and Proximity to bars/restaurants.
- ◆ Social sites such as Facebook, Twitter, YouTube and Trip Advisor were used by more than 75% of visitors in 2016 when researching their golf break.
- ◆ 81% of visitors travelled in small groups of 6 or less and class themselves as Social Golfers with 22% classing themselves as Luxury Golfers and 19% Holiday Golfers.

## Value Proposition

- ◆ Moray Speyside offer some of the most picturesque golf courses in Scotland, some of which were designed by pioneers in the industry. The rich history combined with the quality of natural links and parkland courses offers the perfect golf break experience for players of all abilities.
- ◆ Moray Speyside has a great cultural offering that can be combined with golf packages to enhance the visitor experience, these include: Active pursuits, Whisky tours/tasting, fishing, cycling and walking trails and a variety of shops and restaurants.
- ◆ The golf courses in Moray Speyside have mostly all received an average overall rating of 4.5 stars on Trip Advisor with some guests claiming that their golfing experience was one of the best they have ever had. This is a phenomenal achievement that should be promoted further. Upon analysis of the reviews the following themes emerged:
  - \* Great Value for money
  - \* Unpretentious club houses
  - \* Courses in good condition and challenging whilst still enjoyable
  - \* Welcoming and friendly staff
- ◆ The above comments are in line with the decisive factors identified when choosing a golf break (as outlined in the Visit Scotland Golf Visitor Survey). Therefore it is important to combine these within the Key messages delivered.

## Marketing Goals

- ◆ To increase visitor numbers by 10% over two years targeting the following markets:
  - \* Neighbouring Regions
  - \* Rest of the UK
  - \* International (Matched to Moray Speyside Tourism markets)

## Key Strategies

- ◆ To create targeted marketing campaigns that strengthen Moray Speysides's profile as a 'must play' destination within Scotland, segmenting activity to ensure that the spread of Moray Speyside's golf product (e.g. Parkland, Links) is marketed to relevant audiences – 'Social golfers', 'luxury golfers' and 'holiday golfers' (as defined by Visit Scotland).
- ◆ To grow the share of golf visitors who choose Moray Speyside as their golfing destination, and develop initiatives to encourage loyalty.
- ◆ Increase the share of 'social golfers', holiday golfers' and 'luxury golfers' (as per the Visit Scotland Golf Visitor Survey) and seek ways to increase their overnight stays.
- ◆ To develop a shared social media strategy amongst all member golf clubs to ensure consistent key messages are being communicated and to encourage that "emotional relationship" with followers, resulting in greater engagement and loyalty.
- ◆ To utilise the "Home of Golf" branding on all communications to increase awareness of Scotland's USP as well as the USP of Moray Speyside as outlined in the value proposition.

## Impacting Factors and Barriers to success

- ◆ Quality of Service/Accommodation
- ◆ Price compared to other holiday types i.e. beach holidays
- ◆ Independent reviews
- ◆ Negative perceptions on cost and access to courses
- ◆ Fragmentation of clubs—reluctance to engage with others.
- ◆ Competition from neighbouring regions—Aberdeenshire and Highlands offer golf packages and are listed on the top 5 golf travel provider sites.

Activity	Cost
◆ Develop Website	£1000
◆ Develop a Social Media strategy (this includes how to respond to online reviews) each club to be in agreement in order to ensure consistent communications.	£500
◆ Encourage partnerships, dialogue and knowledge-sharing between golf clubs and local tourism businesses in order to improve the overall quality of the visitor experience	£250 per workshop
◆ Develop a range of golf packages that centre around the value proposition. The pricing/positioning and the theme of these packages should take into account the relevant audiences (5 key customer groups).	£500 facilitate partnership workshop
◆ Develop the Packaging of experiences for golfing visitors (e.g. with accommodation, food and dining, whisky tours)	£250 per workshop
◆ Develop traditional media (Leaflets/Posters) for within clubs that outline information for golfing visitors about characteristics of golf courses and what to do in the local area	£750
◆ Develop campaigns, initiatives and associated offers that highlight the history of golf in Moray Speyside, cultural offerings of the area and the high quality of courses on offer	£500 per campaign
◆ Carry out campaigns and initiatives through the golf trade press and develop partnership marketing activities with all golf clubs within Moray Speyside.	£1000 per campaign
◆ Develop trade marketing programme to connect Moray Speyside golf packages with the top 5 UK golf tourism operators	£2000
◆ Organise a Moray Speyside Golf Launch event , possible 2 day event spread over all partner clubs. Preferably this would involve inviting PGA pro's from UK clubs, bloggers and press.	£5000
◆ Possibly attend the International Golf Travel Market Trade Show in Slovenia to promote Moray Speyside Golf to International Golf travel operators.	£3,578