

GOLF TOURISM IN
NORTHERN
IRELAND
2023
APRIL 2024



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OBJECTIVES



Monitor introduced in 2013



To gather data on the volume and value of visiting golfer rounds played on golf courses in Northern Ireland

To better understand who the Northern Ireland golf tourist is

To establish base data for on-going measurement in the years ahead

AIMS



THE PROGRAMME - 2023

▪ Rounds Played

- This is the first time Sporting Insights has run the monitor since 2019
- 18 clubs submitted data for the whole year.
- Data was submitted via a Sporting Insights spreadsheet emailed to courses.

▪ Visitor Interviews

- 300 interviews were conducted among out of state visitors at clubs during the prime golfing season.
- An additional, shorter, questionnaire, was put to 100 domestic visitors from Northern Ireland playing as visitors at courses.
- Interviewers asked visiting golfers questions about:
 - Their golf visit
 - The length and type of break and their expenditure
 - Their level of enjoyment of golf in Northern Ireland

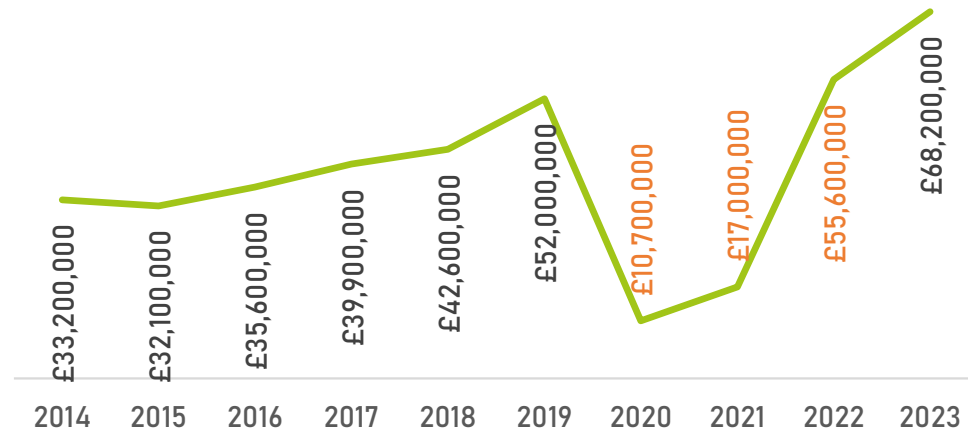
KEY FINDINGS



KEY FINDINGS | Impact

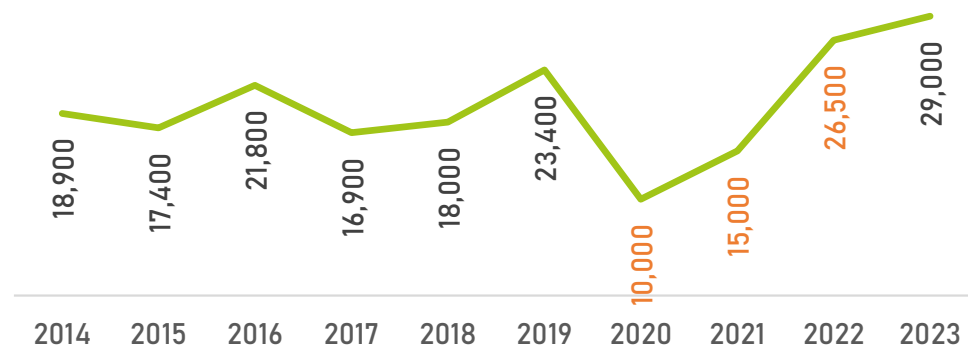
- The Economic Impact of golf tourism for Northern Ireland in 2023 is:

2023 = £68,200,000
 2022 = £55,600,000
 2021 = £17,000,000
 2020 = £10,700,000
 2019 = £52,000,000
 2018 = £42,600,000
 2017 = £39,900,000
 2016 = £35,600,000
 2015 = £32,100,000
 2014 = £33,200,000



- The number of **non-domestic overnight golfers** to Northern Ireland is:

2023 = 29,000
 2022 = 26,500
 2021 = 15,000
 2020 = 10,000
 2019 = 23,400
 2018 = 18,000
 2017 = 16,900
 2016 = 21,800
 2015 = 17,400
 2014 = 18,900

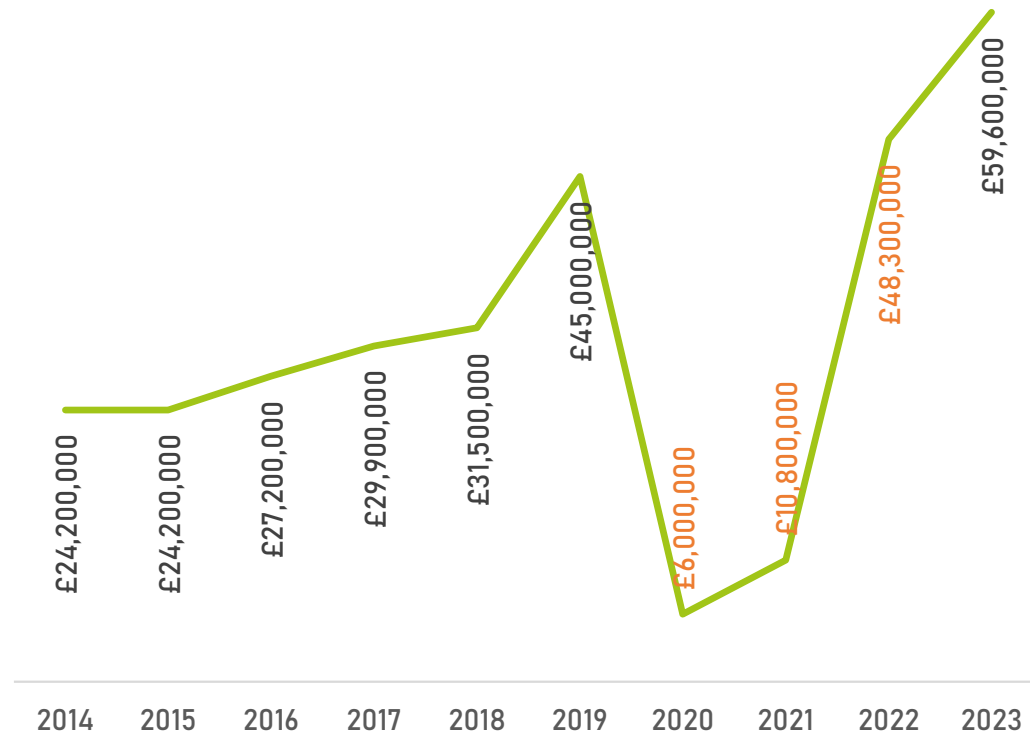


Orange figures are estimates based on partial research as a full monitor was not conducted for these years
 There was no formal research for visitors between 2020 and 2022

KEY FINDINGS | Non-domestic

- The Economic Impact of golf tourism from **non-domestic overnight golfers** for Northern Ireland in 2023 is:

2023 = £59,600,000
 2022 = £48,300,000
 2021 = £10,800,000
 2020 = £6,000,000
 2019 = £45,000,000
 2018 = £31,500,000
 2017 = £29,900,000
 2016 = £27,200,000
 2015 = £24,200,000
 2014 = £24,200,000



Orange figures are estimates based on partial research as a full monitor was not conducted for these years
 There was no formal research for visitors between 2020 and 2022

ECONOMIC TRENDS AND KEY TAKE OUTS



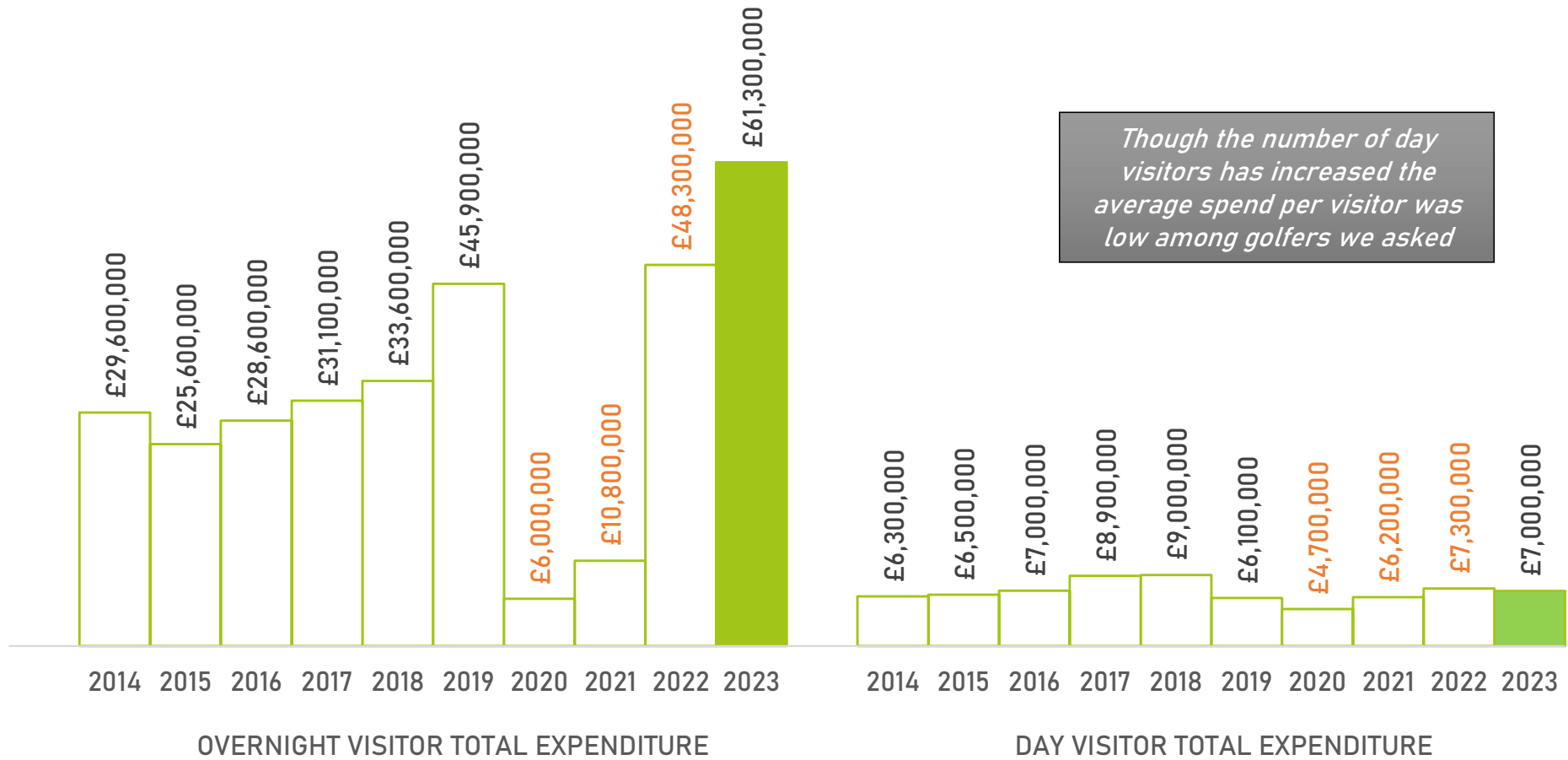
Overall growth of the game results in positive movements

- Though there was a rise in domestic visitors during the peak of COVID, non-domestic visits dropped severely due to travel restrictions. Around 4 out of 5 golfers had at least one of their golf breaks postponed or cancelled and the vast majority of golf clubs that we spoke to said that business was down around 75% in 2020 compared to 2019.
- Efforts during and right after the pandemic have led to a great recovery. In 2023 the combination of more overseas visitors and higher expenditure has seen the economic impact of golf tourism to Northern Ireland rise significantly compared to 2019 (+£16.2 million) with the figure now at £68.2 million (*Global inflation between 3% – 9% since 2019*).
- The increase in prices and the luxury end of the market for the US visitor has been significant in driving the overall growth in economic impact. In addition, a very positive growth in golfers from Great Britain has seen their spend close to double since 2019. This demonstrates the success of the Tourism Recovery Action Plan which focused on GB golfers as a strategic element of the Covid-19 recovery.
- There is room for growth among visitors from Europe and the rest of the world. Golfers from the ROW are typically looking for trophy venues and may be more difficult to target due to flight connections and the challenges for tee time availability. The average number of rounds played per person has increased for non-domestic visitors since 2019, and domestically golf continues to do well but there is minimal expenditure on day visits.

VOLUME AND VALUE OF GOLF TOURISM

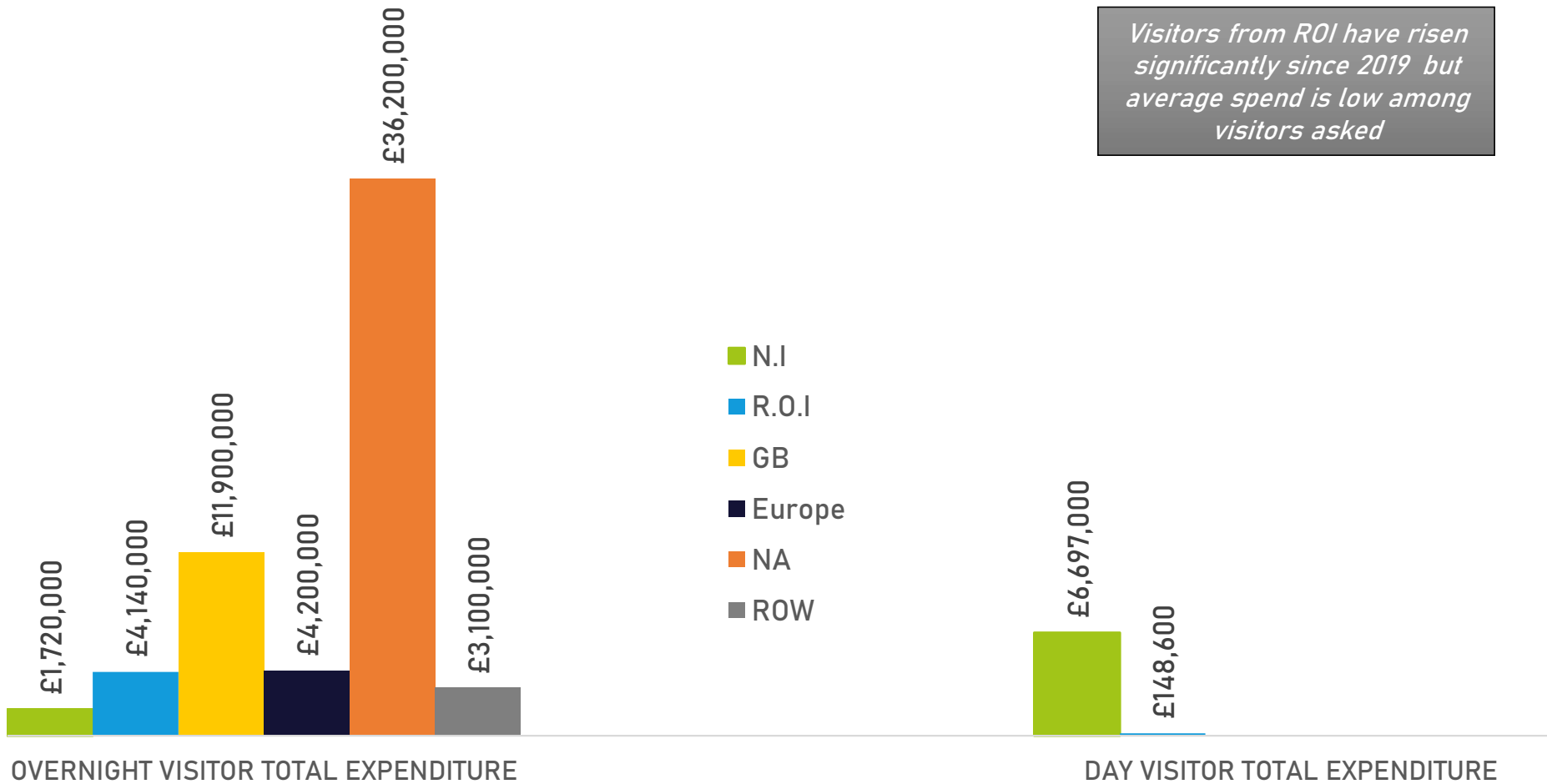


OVERNIGHT VS DAY VISITOR REVENUE



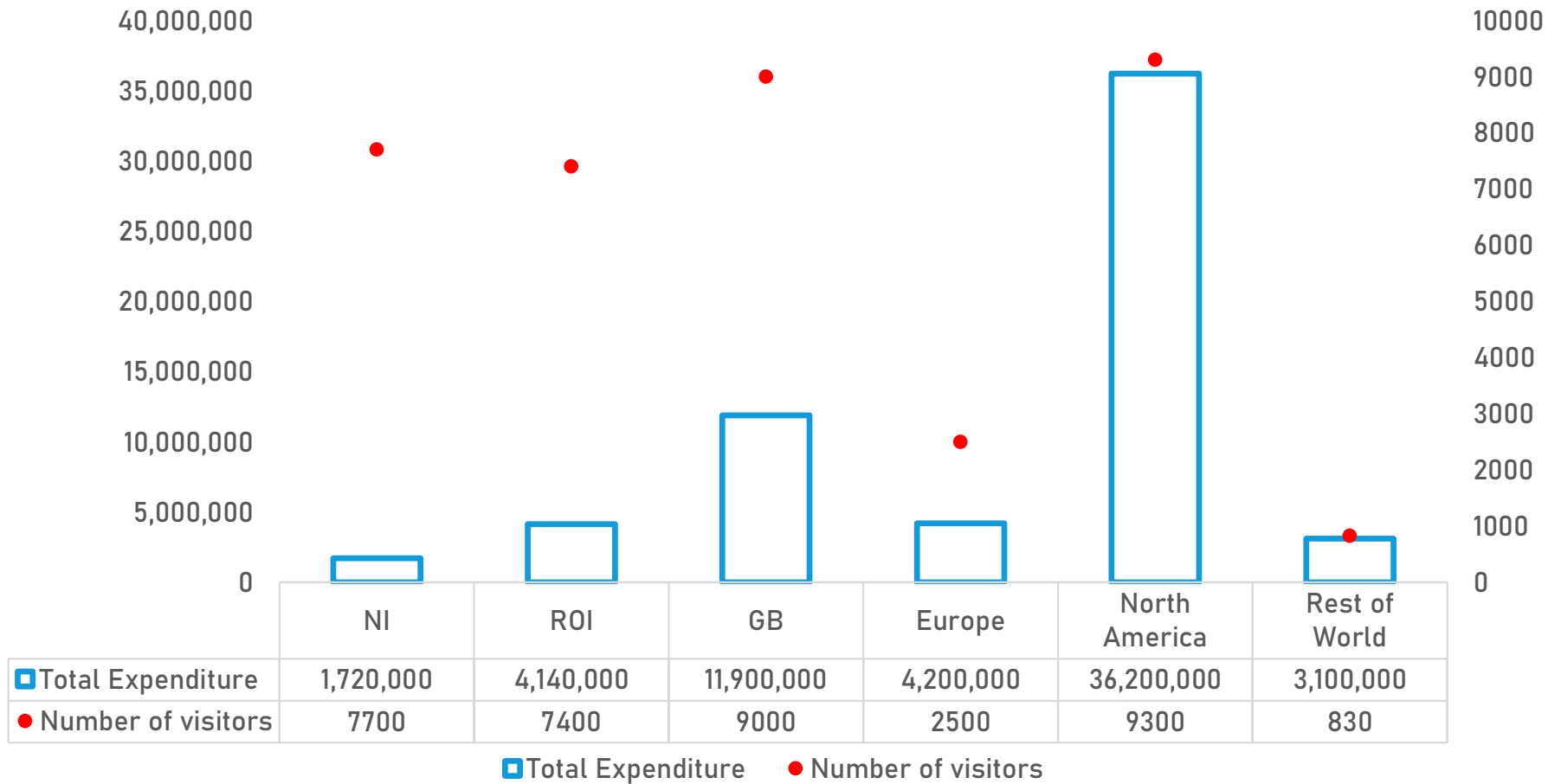
Orange figures are estimates based on partial research as a full monitor was not conducted for these years
There was no formal research for visitors between 2020 and 2022

EXPENDITURE BY COUNTRY

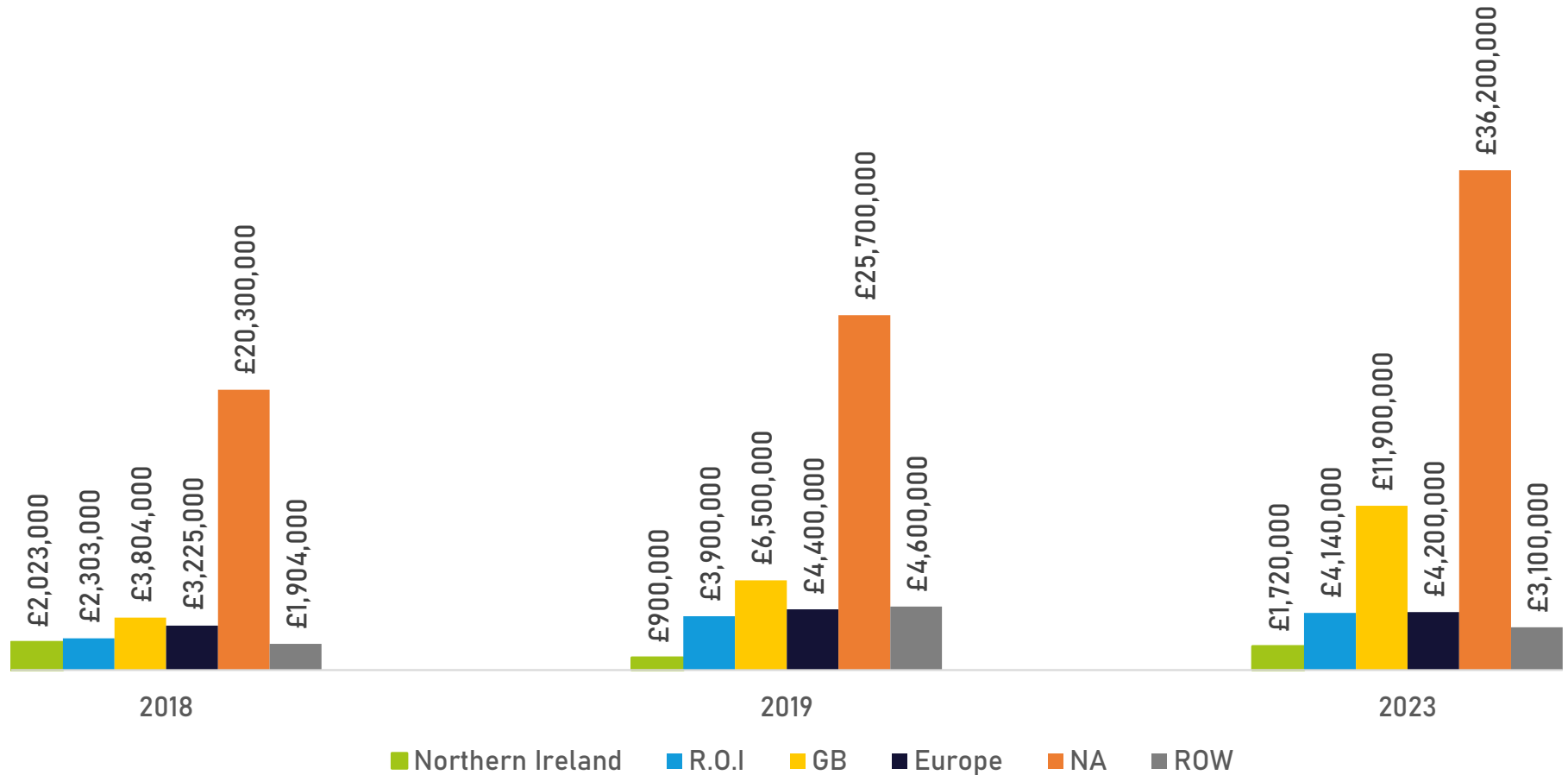


EXPENDITURE & FOOTFALL | Overnight visitors

Though visitors from ROI rises average spend was low among golfers asked

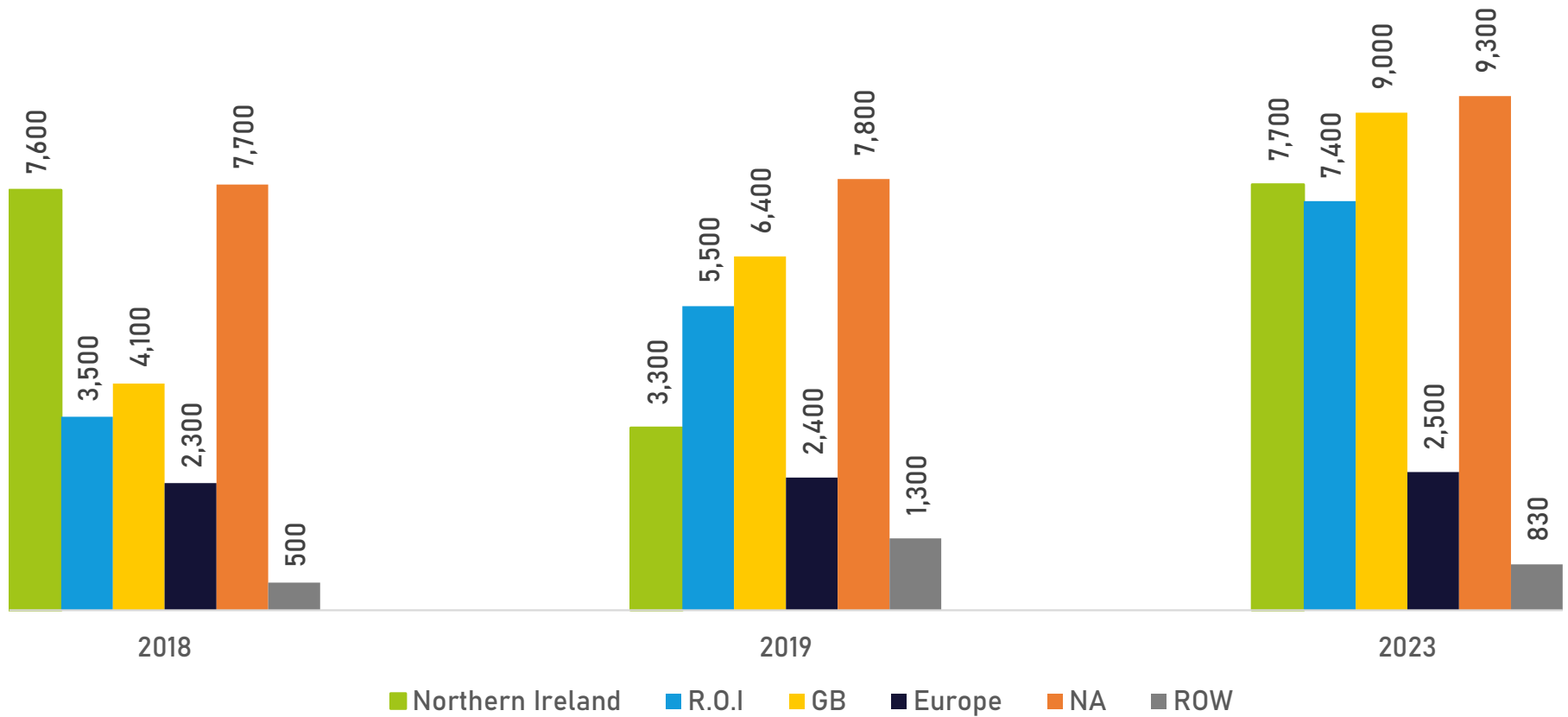


TOTAL EXPENDITURE | Overnight visitors



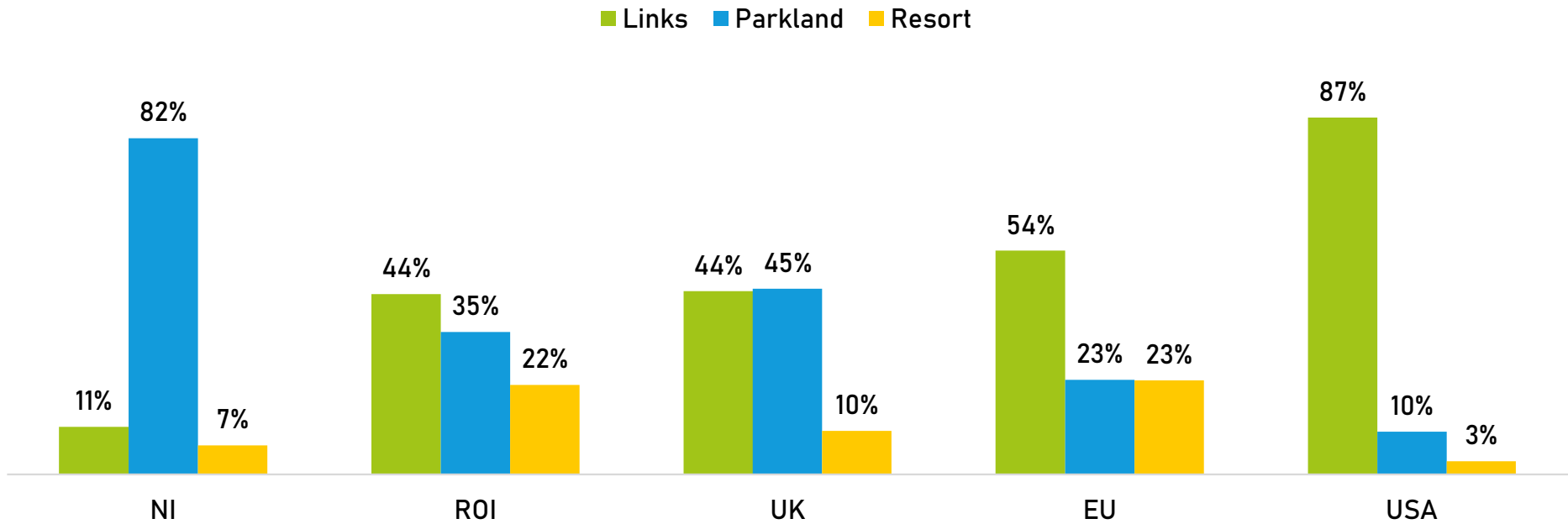
TOTAL VISITORS | Overnight visitors

Visitors from ROI have risen from 3,447 in 2019 to 7,421 in 2023



COURSE TYPES | Country origin

Country origin by golf course type...



The majority of domestic visitors played a parkland course while those from the US predominantly played links courses.

Rounds played submissions

CONSUMER FEEDBACK



CONSUMER TRENDS AND KEY TAKE OUTS



More younger North Americans focused on golf and great courses

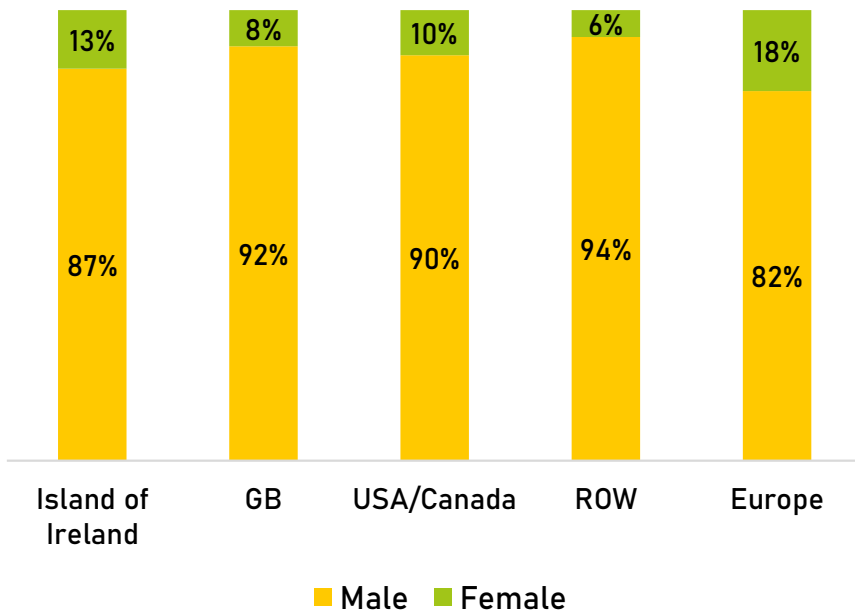
- The likelihood of playing golf as just part of a trip has greatly reduced since 2019 and almost universally the main purpose of the trip was golf in 2023. Two thirds of golfers are likely to take a golfing trip where they are staying overnight at least once or twice a year.
- For more than half of North American golfers this was the first time visiting Northern Ireland, and two thirds booked through a tour operator. Overall tour operator bookings compared to 2019 are up significantly from 25% to 43%.
- Good courses were still the decisive influencing factor, followed by the hospitality and food in 2023. When it comes to the type of course played, visitors from the US predominantly played links courses while domestic visitors were most likely to play a parkland course.
- Satisfaction with facilities and customer services is high, and NI is seen as better value for money and more enjoyable compared to other golfing destinations. 9 out of 10 gave their accommodation the highest rating and enjoyment of the golf break was universal. Nearly all plan on returning to play golf in NI in the future.

CONSUMER FEEDBACK | Where do you live ...

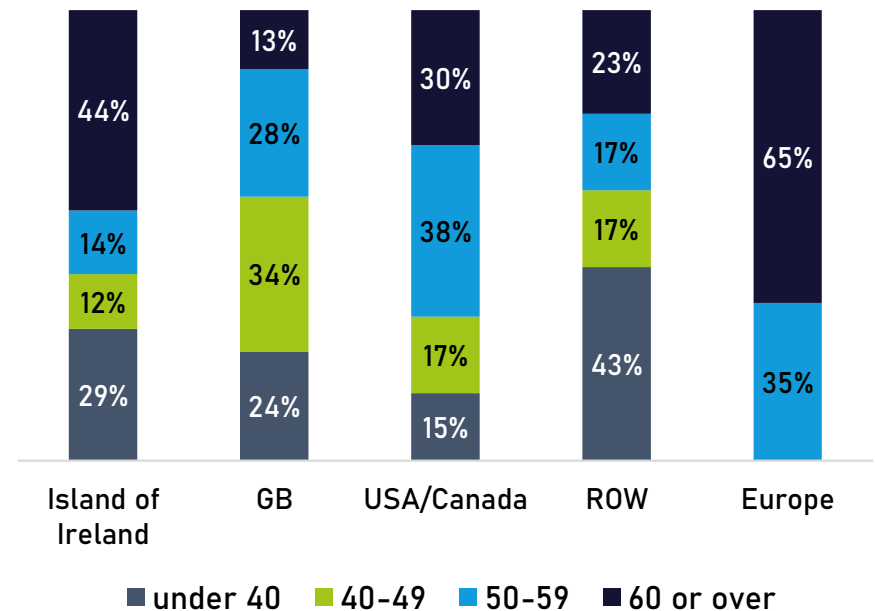


CONSUMER FEEDBACK | Interviewee profile

Gender



Age

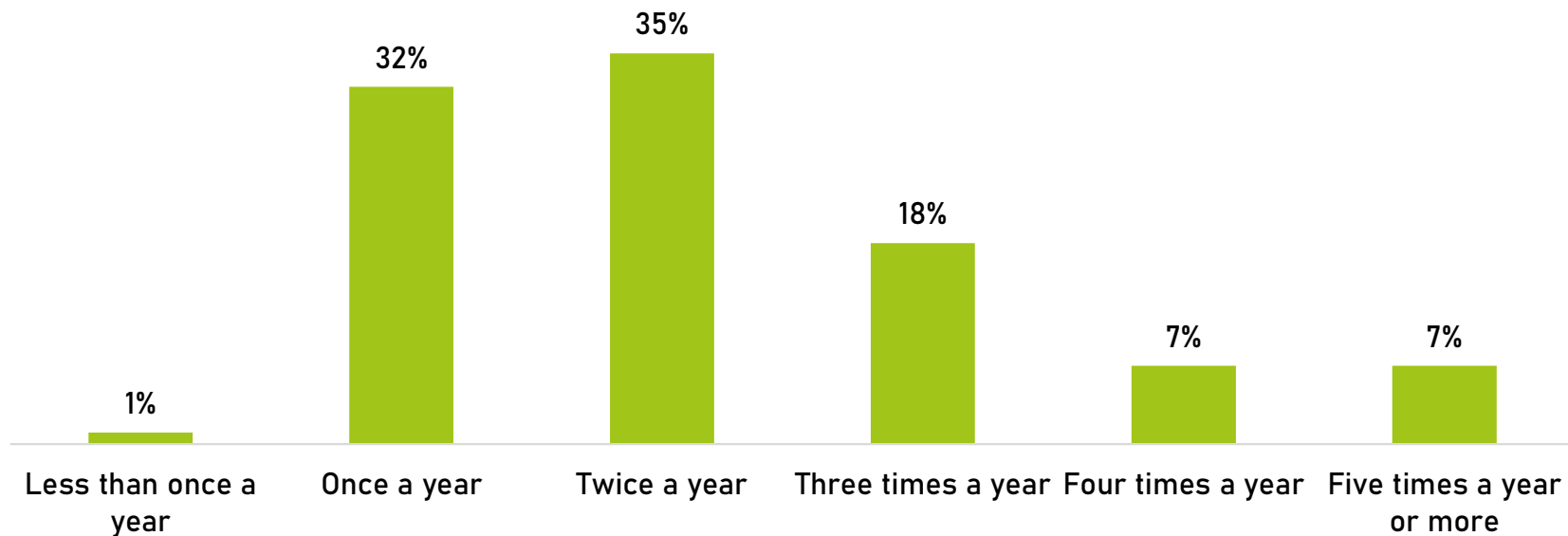


Generally one in ten respondents were women, this increases to 13% of those visiting from Island of Ireland. The youngest visitors tended to come from ROW, with more than 2 in 5 being under 40 years old.

Base: Gender Iol 87, GB 51, USA/CA 187, ROW 35, EU 17 / Age Iol 90, GB 53, USA/CA 213, ROW 35, EU 17

CONSUMER FEEDBACK | How often...

Q: How often do you take golfing holidays or breaks (staying at least one night)?

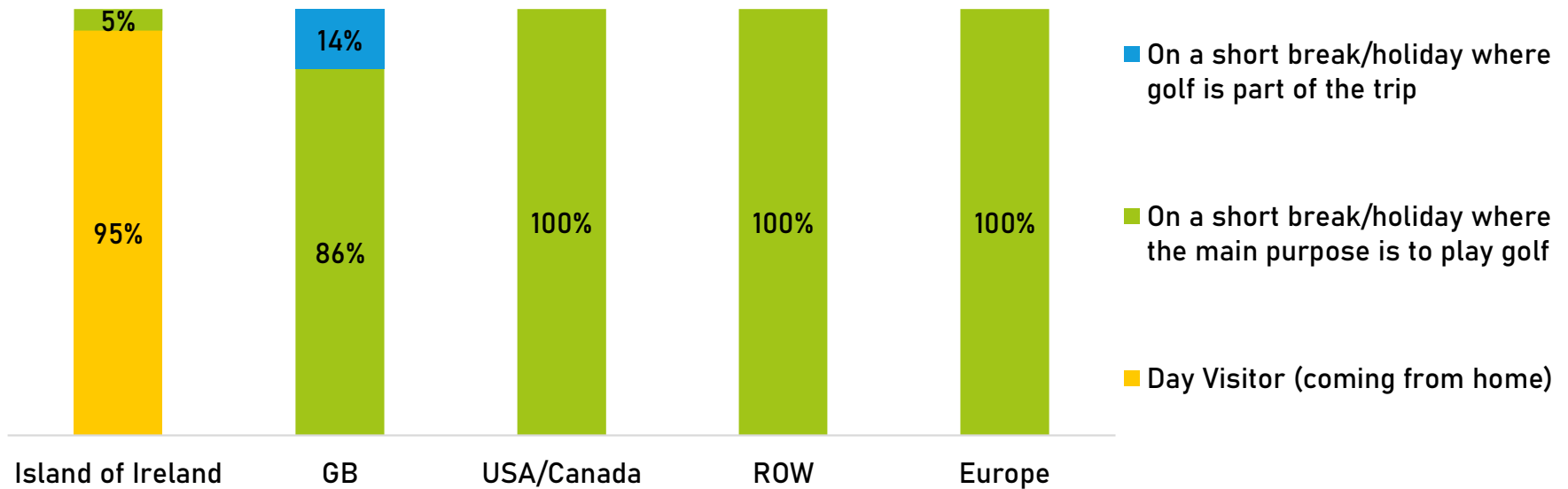


1 in 3 take a golfing break staying at least a night once a year or less often, and the same proportion twice a year. The remaining third were likely to go three times a year or more often.

Base: Overall 298

CONSUMER FEEDBACK | Type of break

Q: Which of the following best describes you? – Out of state only

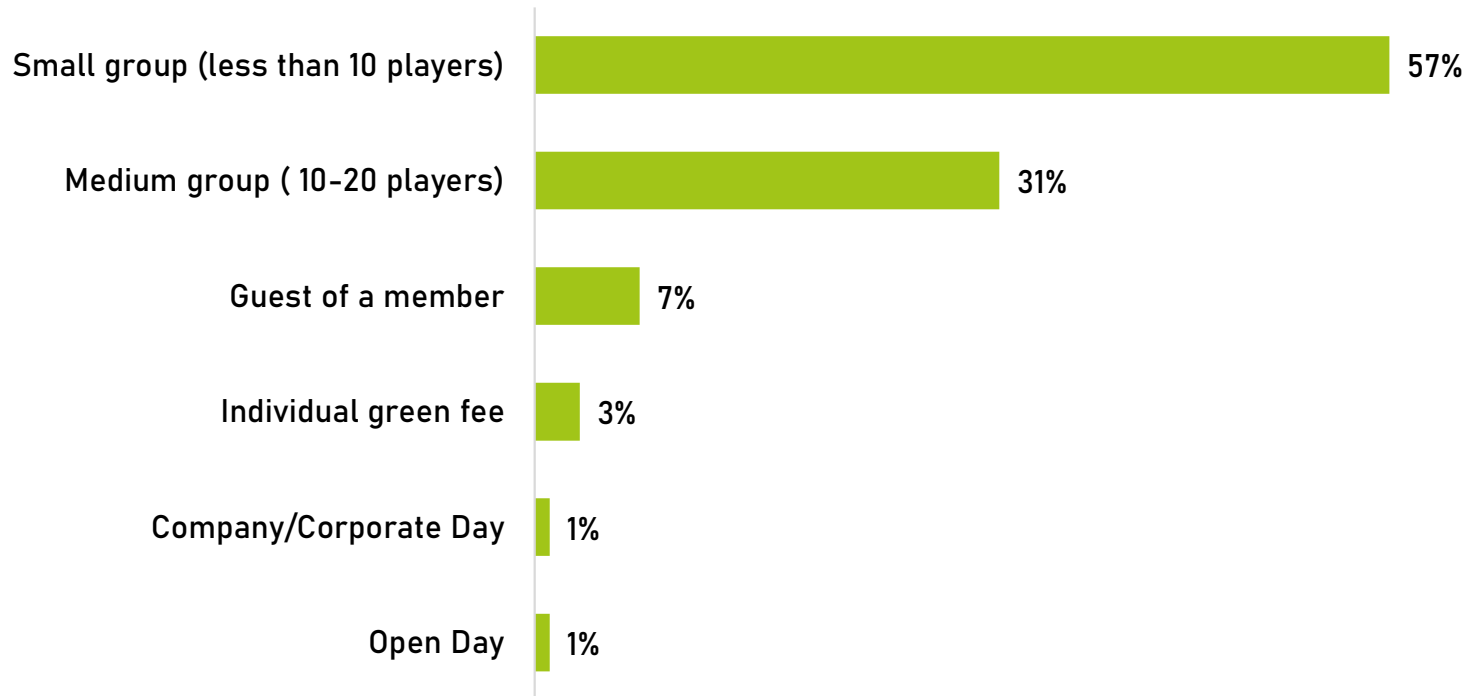


Of those coming from farther shores the main purpose of their trip was to play golf. 1 in 7 (14%) of GB visitors were on a short break/holiday where golf is part of the trip.

Base: Iol 91, GB 56, USA/CA 214, ROW 35, EU 17

CONSUMER FEEDBACK | Capacity

Q: In what capacity are you playing today?

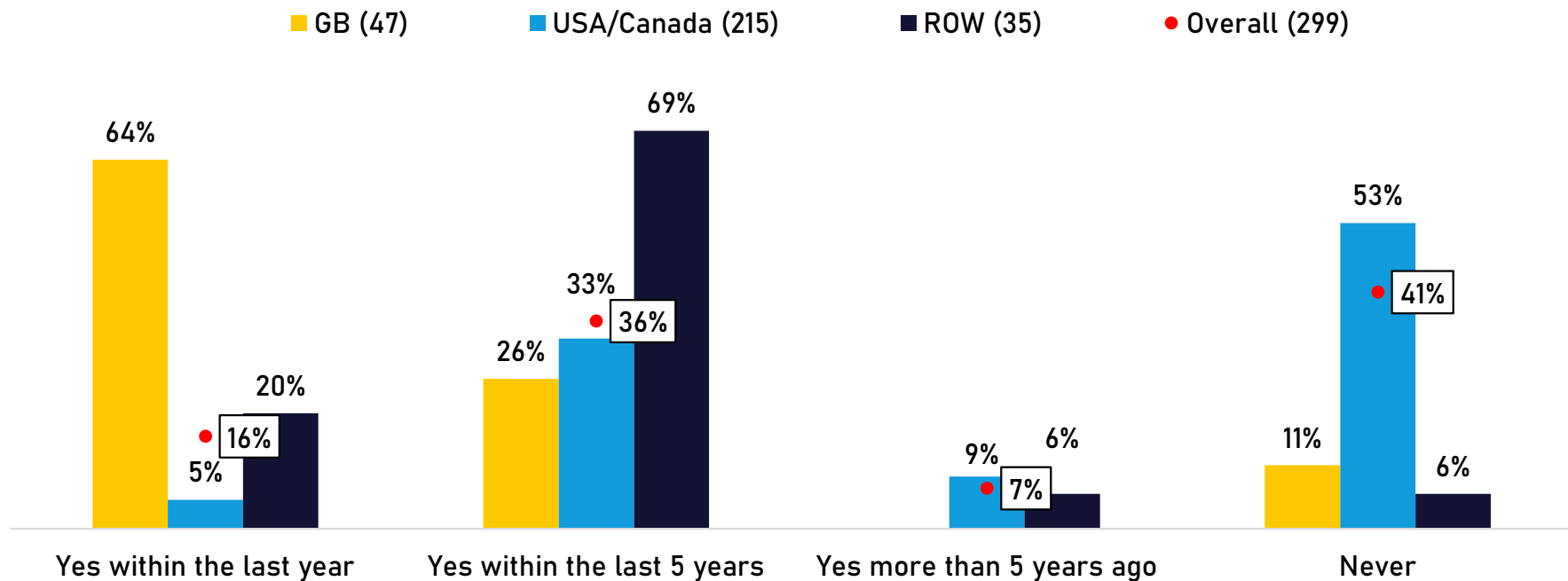


Around 3 in 5 were playing in a small group of less than 10 players, and nearly a third in a group of between 10 and 20 players.

Base: Overall 394

CONSUMER FEEDBACK | Last played in NI

Q: Have you played golf in NI before?

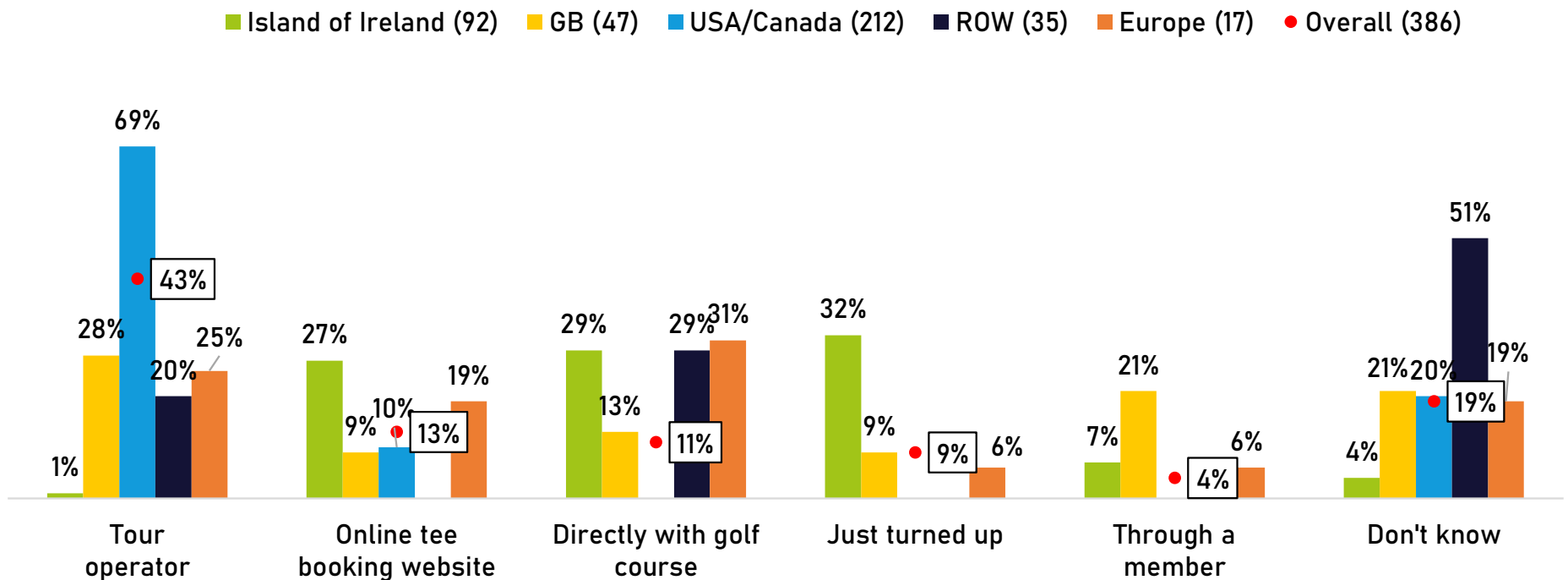


Two thirds from GB had played golf in Northern Ireland in the past year. Around 2 in 5 North Americans had played golf in Northern Ireland in the past 5 years.

Bases in brackets

CONSUMER FEEDBACK | Booking today's round

Q: Do you know how your booking was made?

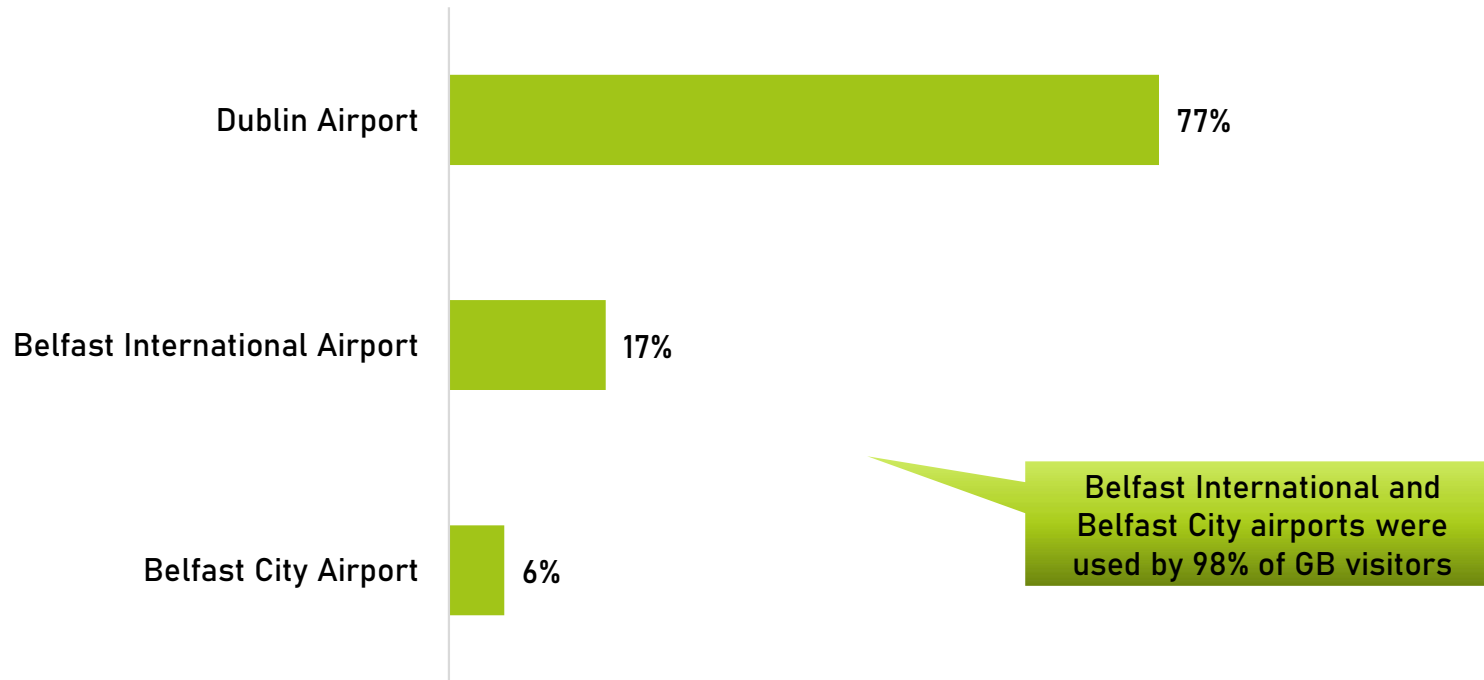


Two thirds of North Americans (69%) made their booking via a tour operator. Online, directly with course and impromptu arrival are all popular methods for Island of Ireland golfers.

Bases in brackets

CONSUMER FEEDBACK | Port of entry

Q: When you arrived in Northern Ireland for your golf trip, which port of entry did you use?



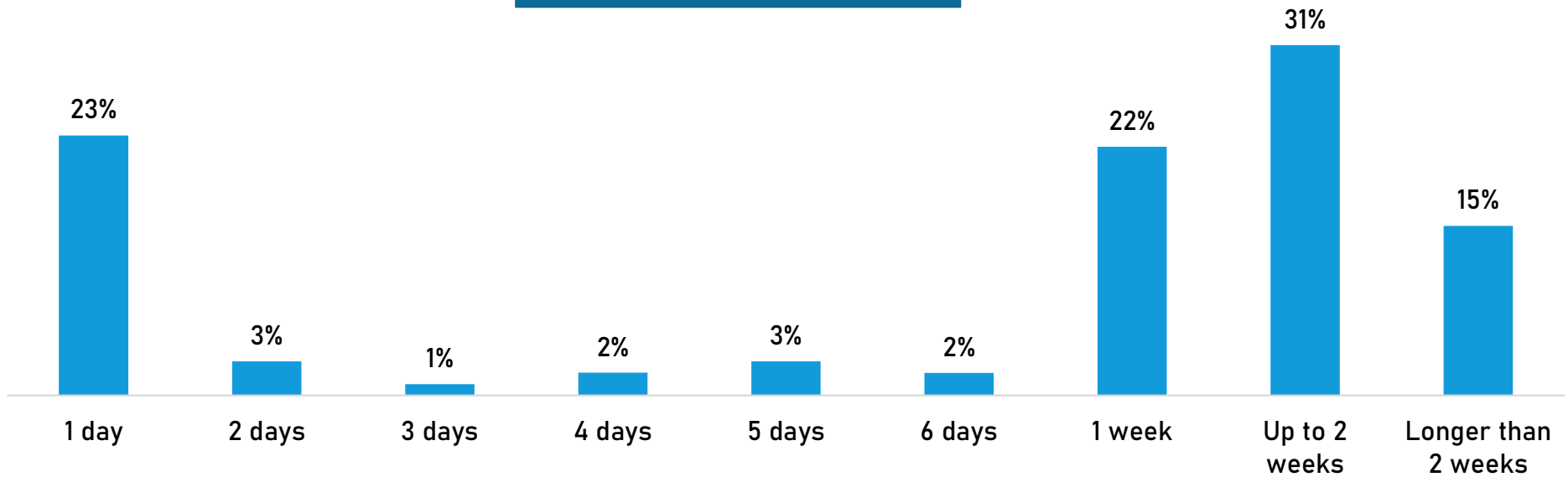
Dublin Airport is by far the most popular port of entry, with nearly 4 in 5 arriving there. Around 1 in 5 said they arrived at Belfast International Airport.

Base: Overall 297

CONSUMER FEEDBACK | Break length

Q: How long is this golf break?

83% of North Americans stayed for between 1 and 2 weeks. Three quarters of visitors from ROW stayed for longer than two weeks



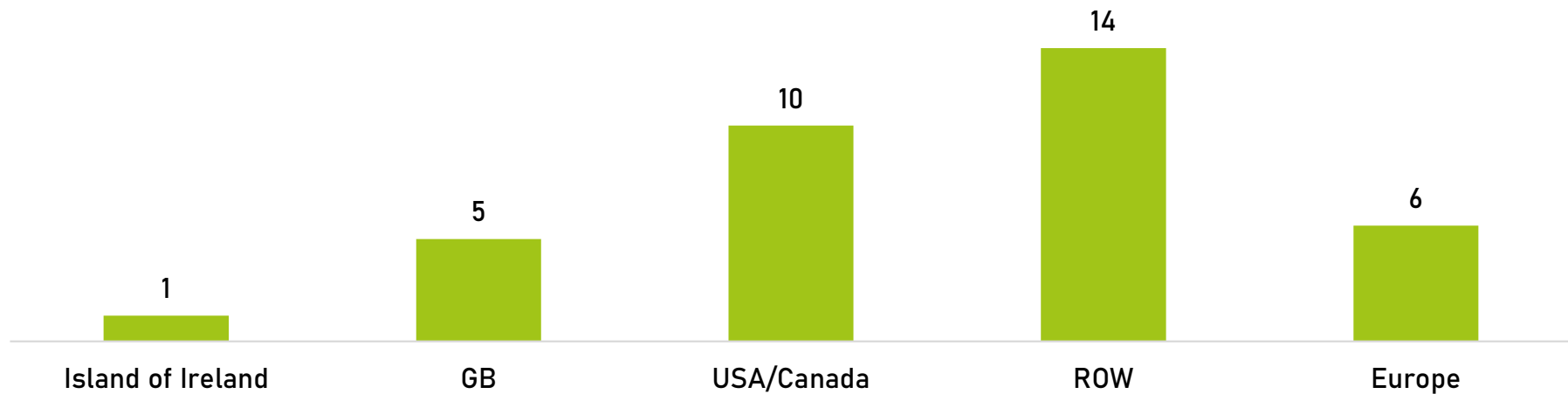
The majority of visitors were staying for a week or more. As to be expected nearly all of those from island of Ireland were on a 1 day trip.

Base: Overall 400

CONSUMER FEEDBACK | Break length

Q: How long is this golf break?

Chart shows average length in days

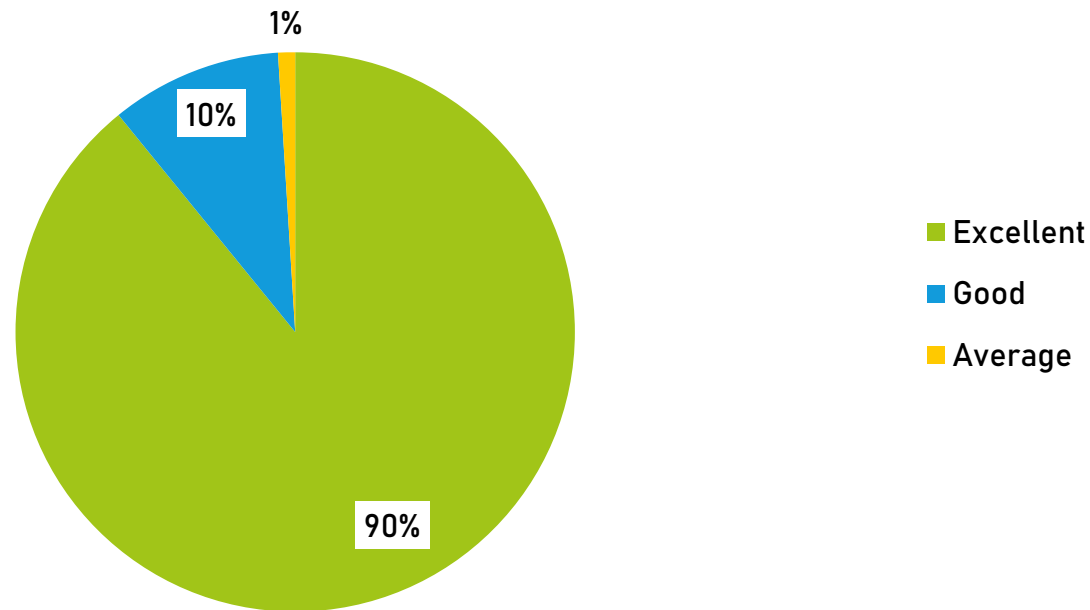


ROW visitors tended to spend two weeks while North Americans spent around ten days on their golf break.

Base: Overall 400

CONSUMER FEEDBACK | Accommodation satisfaction

Q: How would you rate your accommodation so far overall? (1-5 i.e. 1= very poor to 5= excellent)



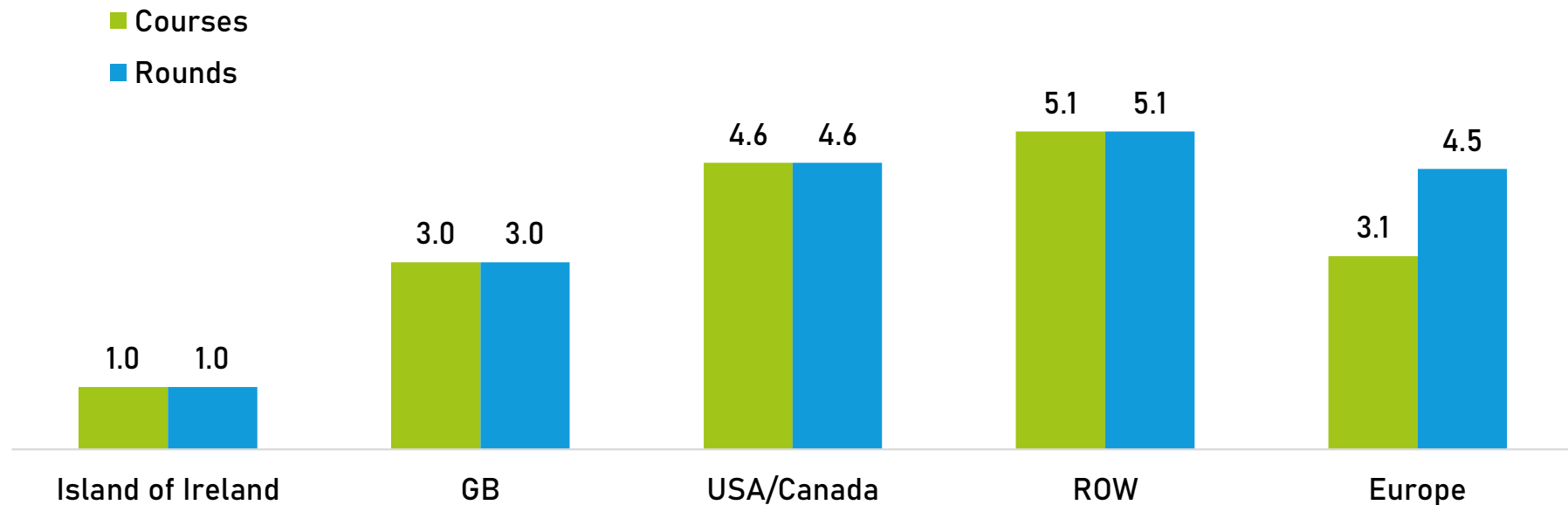
The vast majority (90%) rated their accommodation as excellent, and around 1 in 10 said it was good. No one rated their accommodation below average.

Base: Overall 299

CONSUMER FEEDBACK | Rounds & Courses Played NI

Q: How many **courses** / **rounds** are you expecting to **visit** / **play** in NI on your current golf break?

Chart shows average number



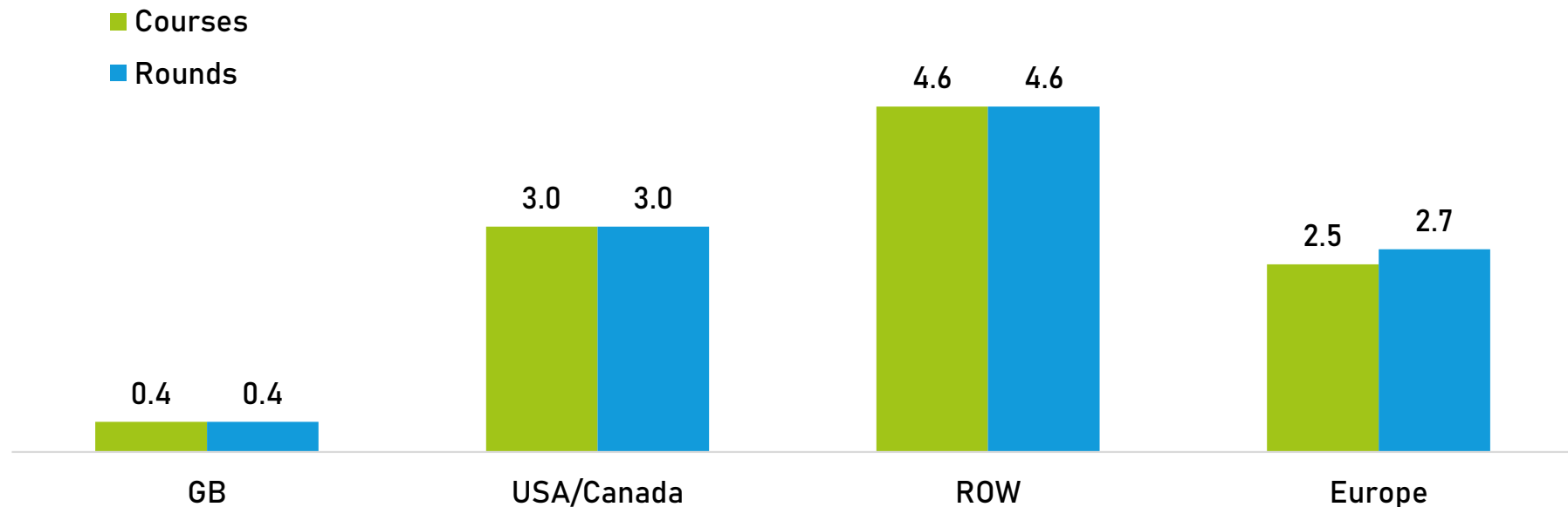
Those who travelled from farther afield such as North America and ROW on average played 1 round at 5 different courses.

Base: lol 92, GB 47, USA/CA 215, ROW 35, Europe 13

CONSUMER FEEDBACK | Rounds & Courses Played Elsewhere

Q: How many **courses** / **rounds** are you expecting to **visit** / **play** elsewhere on your current golf break?

Chart shows average number

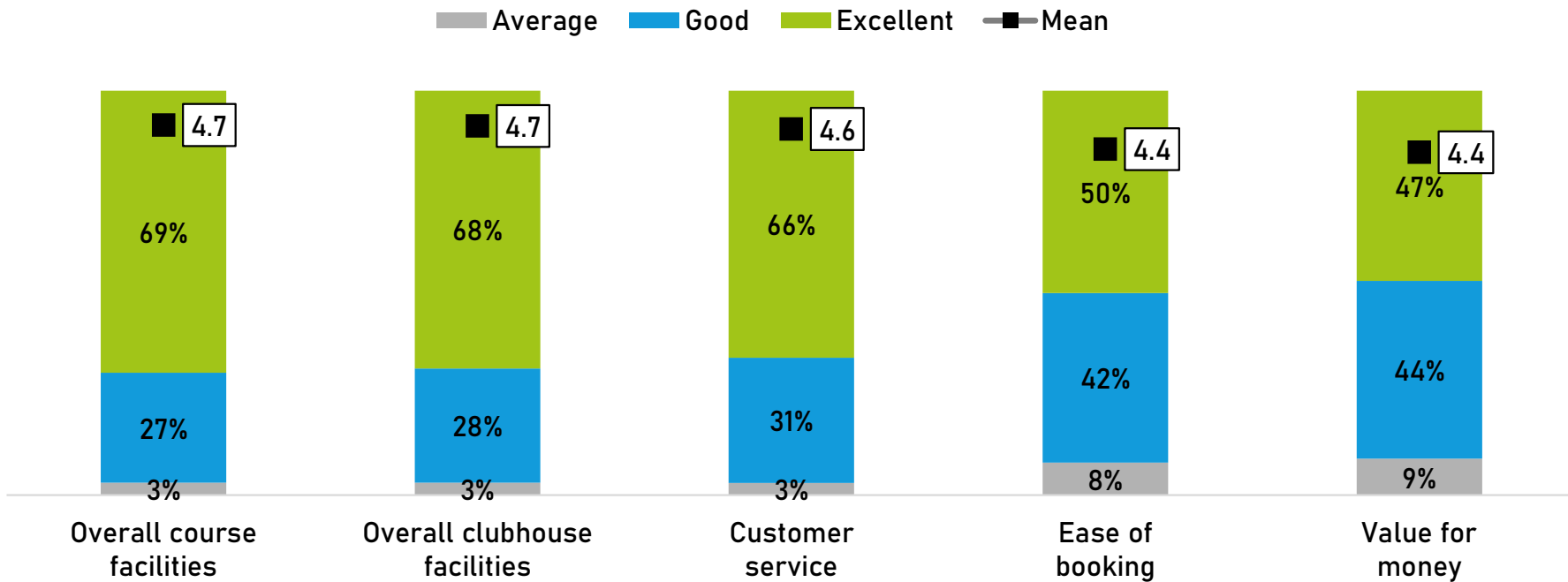


Those who travelled from North America played 1 round at 3 different courses outside of Northern Ireland. ROW visitors on average played 1 round at 5 different courses.

Base: GB 47, USA/CA 215, ROW 35, Europe 11

CONSUMER FEEDBACK | Course Ratings

Q: Regarding this course, how would you rate the following 5 areas?

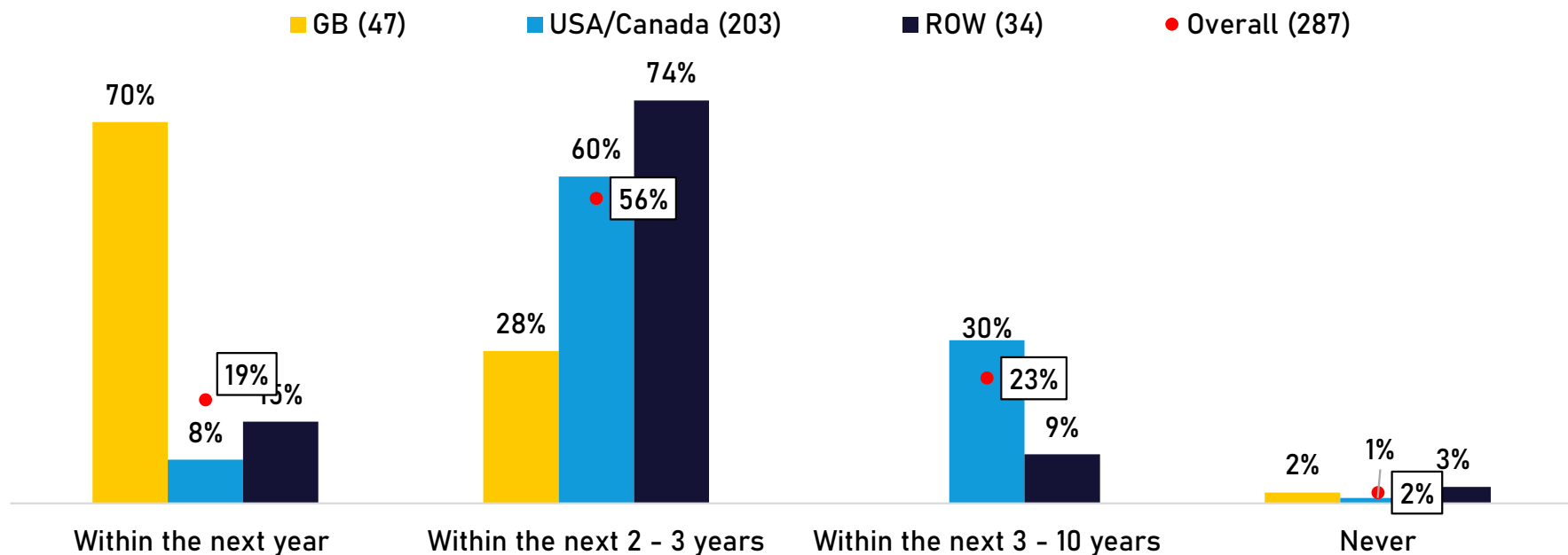


Course and clubhouse facilities along with customer service received the highest ratings of the 5 areas among visitors.

Base: Overall 377-385

CONSUMER FEEDBACK | Returning to NI

Q: When do you think you will return to Northern Ireland for a golf break?

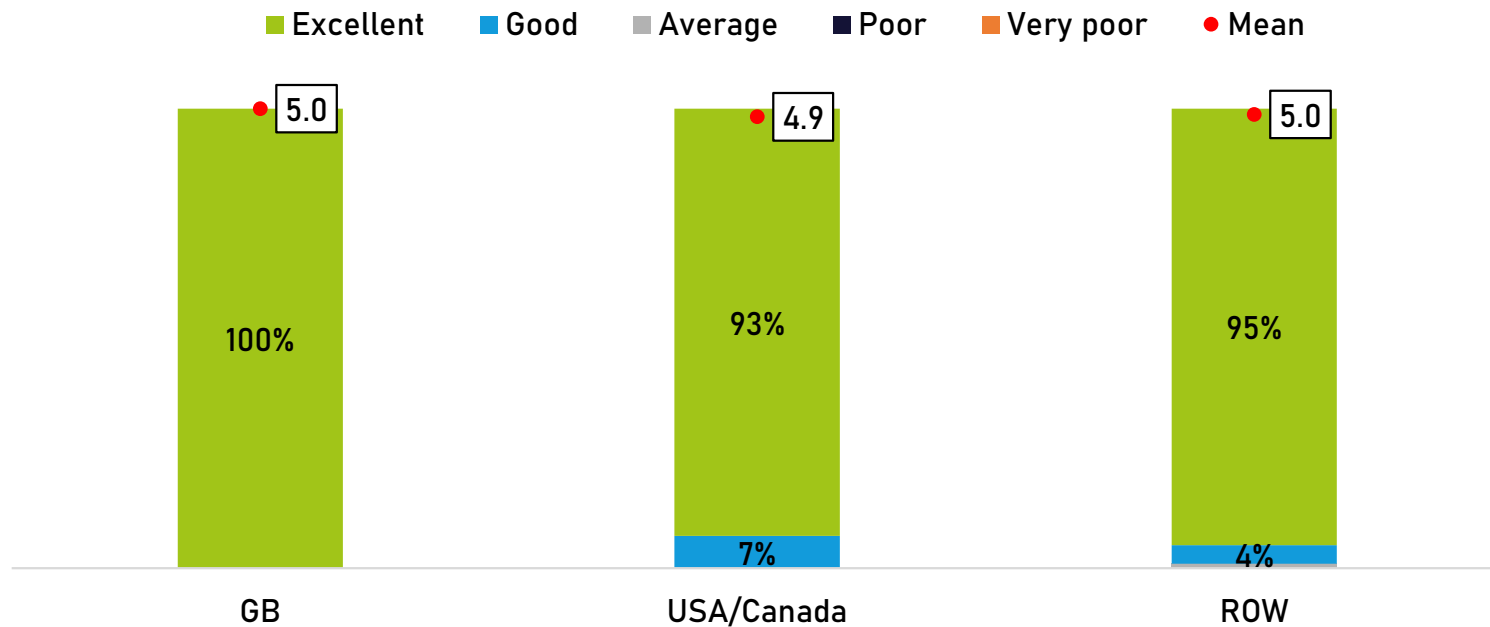


Visitors from closer regions such as GB are highly likely to return within a year. Those from North America and ROW visitors are more likely to return in 2-3 years time.

Base: GB 47, USA/CA 203, ROW 34

CONSUMER FEEDBACK | Golf experience

Q: How would you rate your golf experience overall in Northern Ireland?

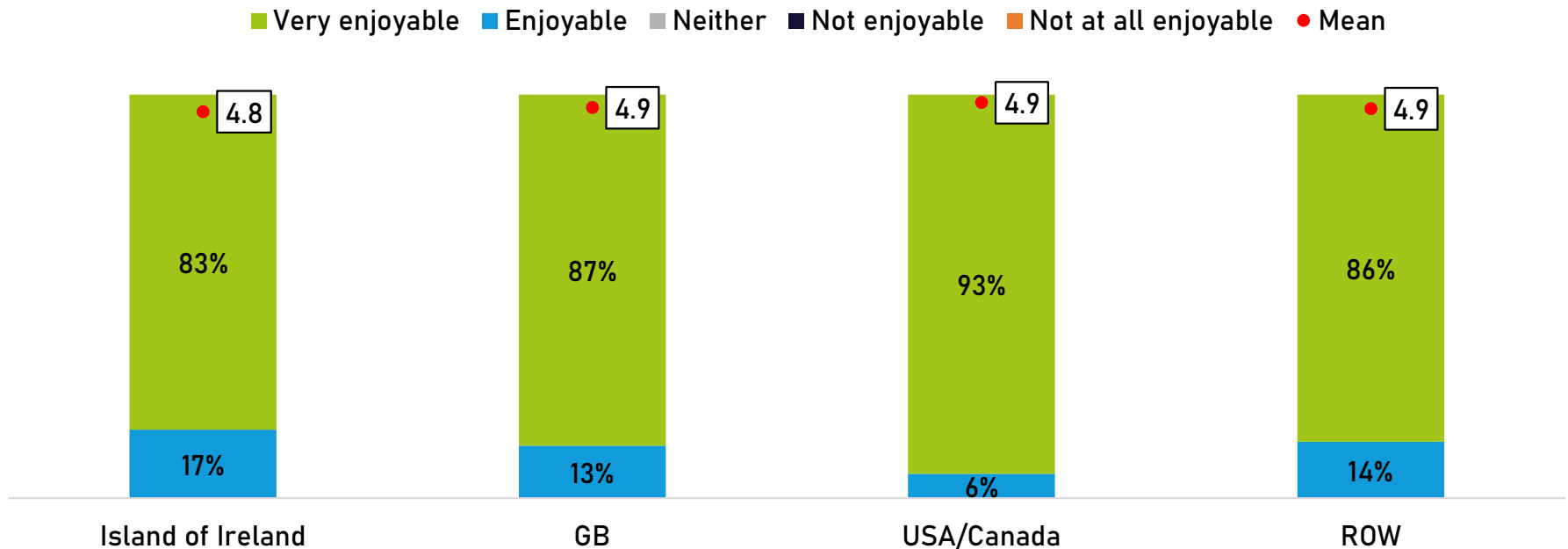


The vast majority rated their overall golf experience in NI as excellent, with just a few in the North America and ROW saying it was good.

Base: GB 45, USA/CA 193, ROW 30

CONSUMER FEEDBACK | Golf break overall

Q: How would you rate your golf break in Northern Ireland overall?



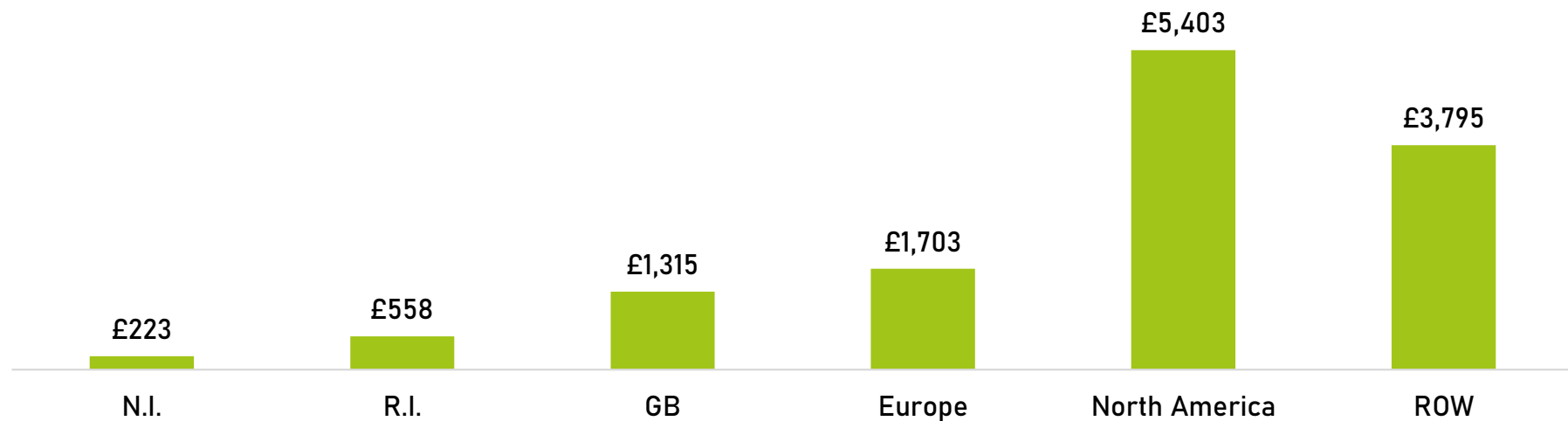
The majority of visitors found their golf break in Northern Ireland very enjoyable overall. Visitors from North America found it most enjoyable by a slight margin.

Base: lol 90, GB 47, USA/CA 206, ROW 35

CONSUMER FEEDBACK | Cost of trip (overnighters)

Q: Please share the cost of your trip to Northern Ireland

Chart shows average total cost in GBP



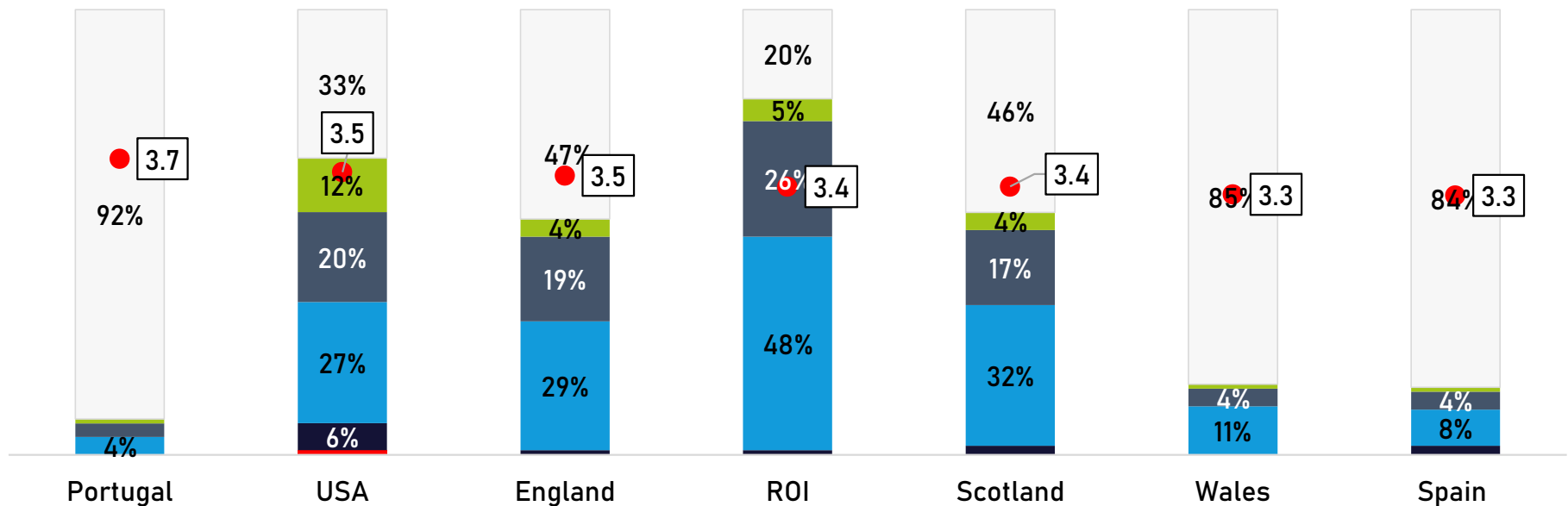
North American visitors spent the most on their trip on average followed by ROW visitors.

Base: Iol 90, GB 47, USA/CA 215, ROW 35, Europe 7

CONSUMER FEEDBACK | NI - Value for money

Q: How would you rate the value for money for golf in NI compared to...?

■ Dont know
 ■ NI is much better
 ■ NI is a little better
 ■ About the same
 ■ NI is a little worse
 ■ NI is much worse
 ● Mean



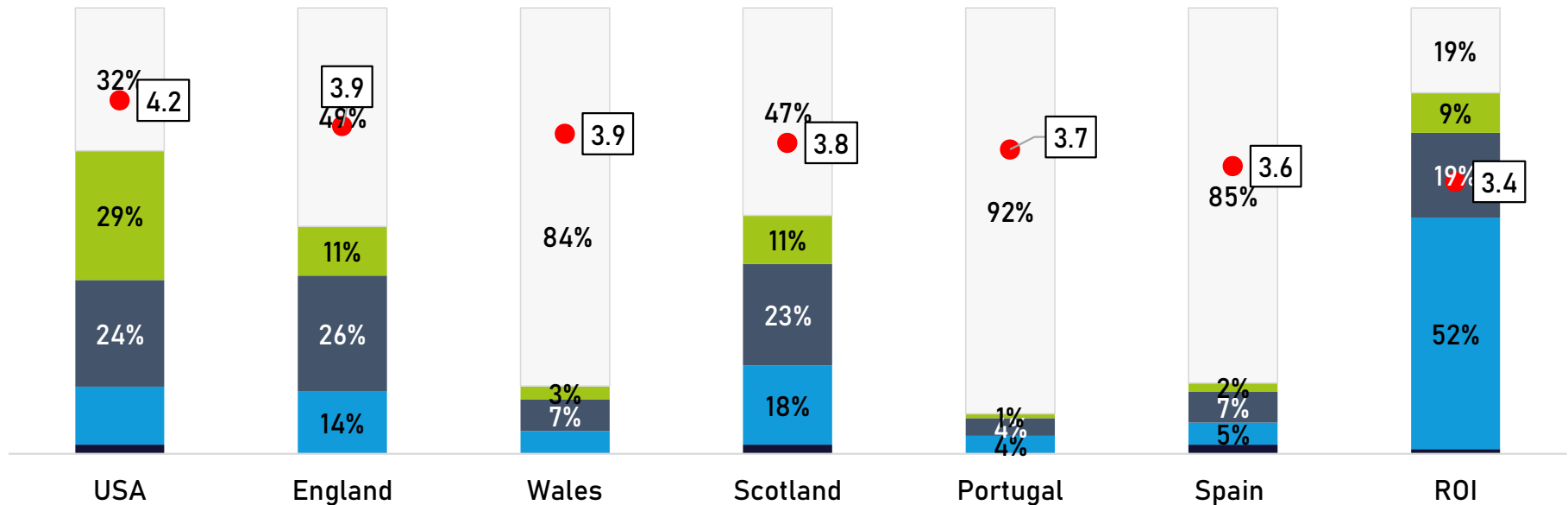
Generally NI is seen as best value for money when compared to the USA, and of those with experience it also compares better than England.

Base: 389

CONSUMER FEEDBACK | NI - Enjoyment

Q: How would you rate the overall enjoyment of a golf break in Northern Ireland compared to...?

■ Dont know
 ■ NI is much better
 ■ NI is a little better
 ■ About the same
 ■ NI is a little worse
 ■ NI is much worse
 ● Mean

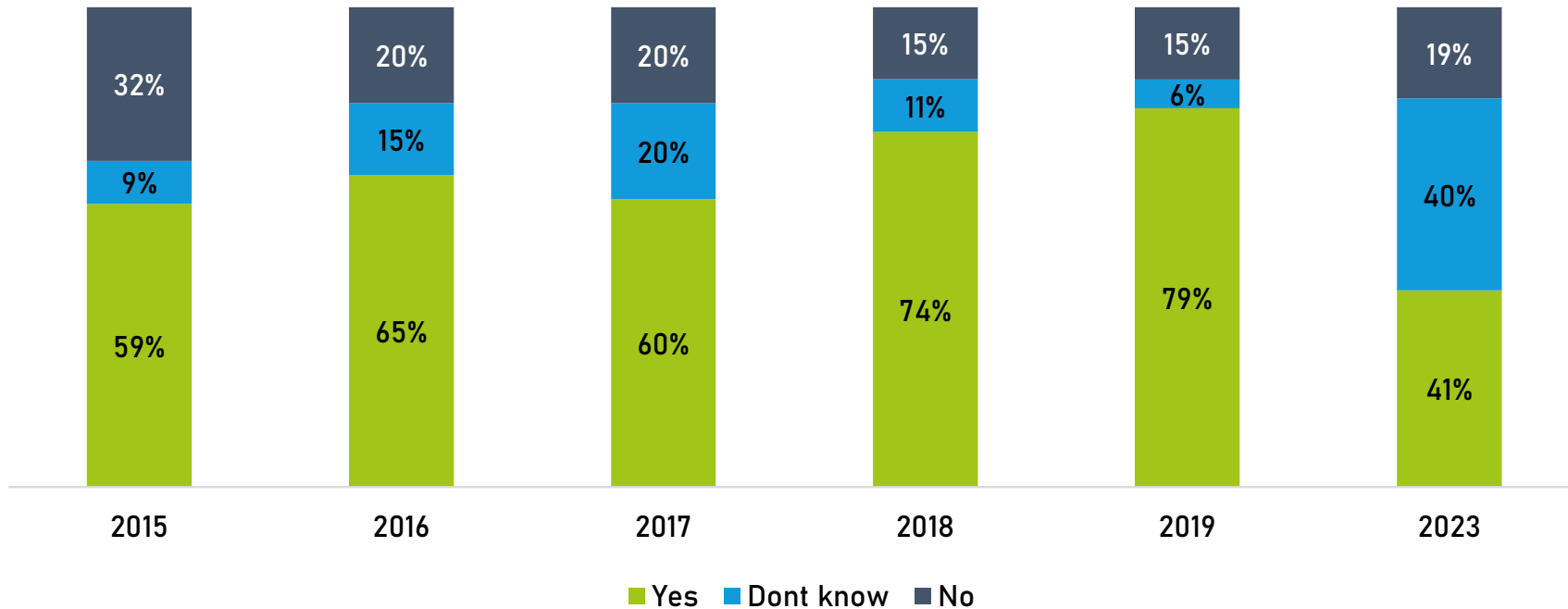


Enjoyment of a golf break in Northern Ireland is seen to be higher than in the USA with 53% saying it's better. More than a third (37%) believe that a golf break in NI is more enjoyable than one in England.

Base: 389

CONSUMER FEEDBACK | Tourist Attractions

Q: Do you intend on visiting any tourist attractions whilst in NI?

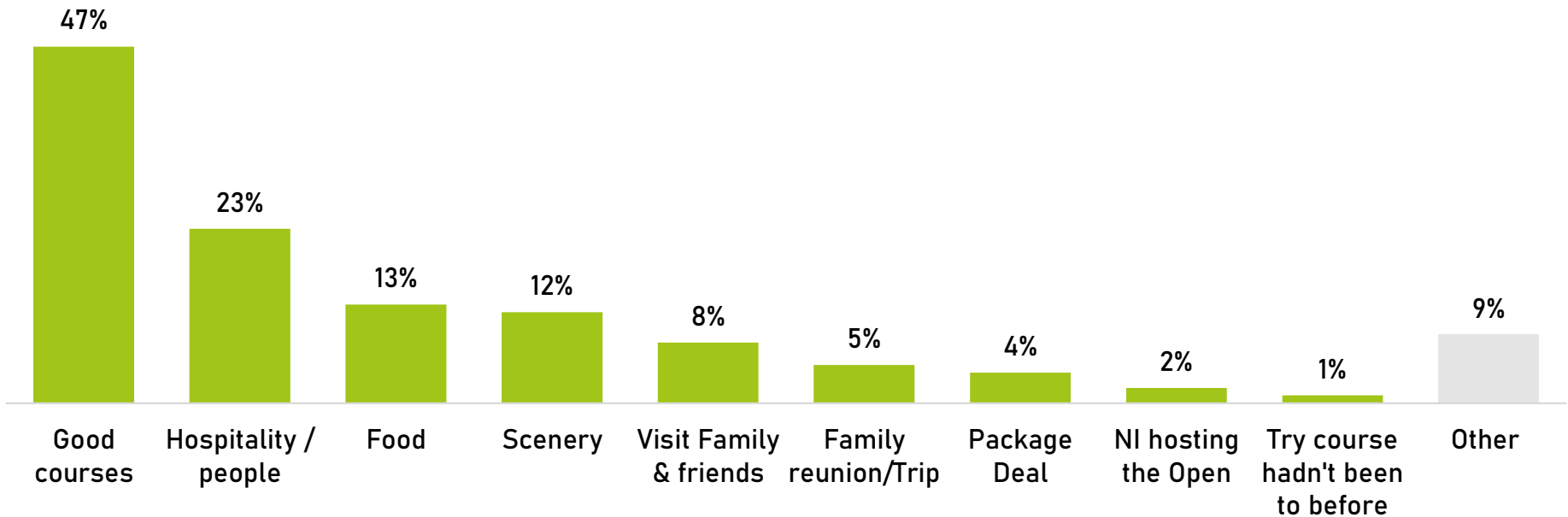


2 in 5 intended to visit tourist attractions whilst in Northern Ireland, and the same proportion were undecided.

Base: 296

CONSUMER FEEDBACK | Choosing NI

Q: Do you know what influenced you / the organiser to choose NI?



Good courses were most influential for almost half of visitors, followed by hospitality/the people. Food and scenery were also important for more than 1 in 10 visitors.

Base: 101

CONSUMER FEEDBACK | Choosing NI

Q: Do you know what influenced you / the organiser to choose NI?

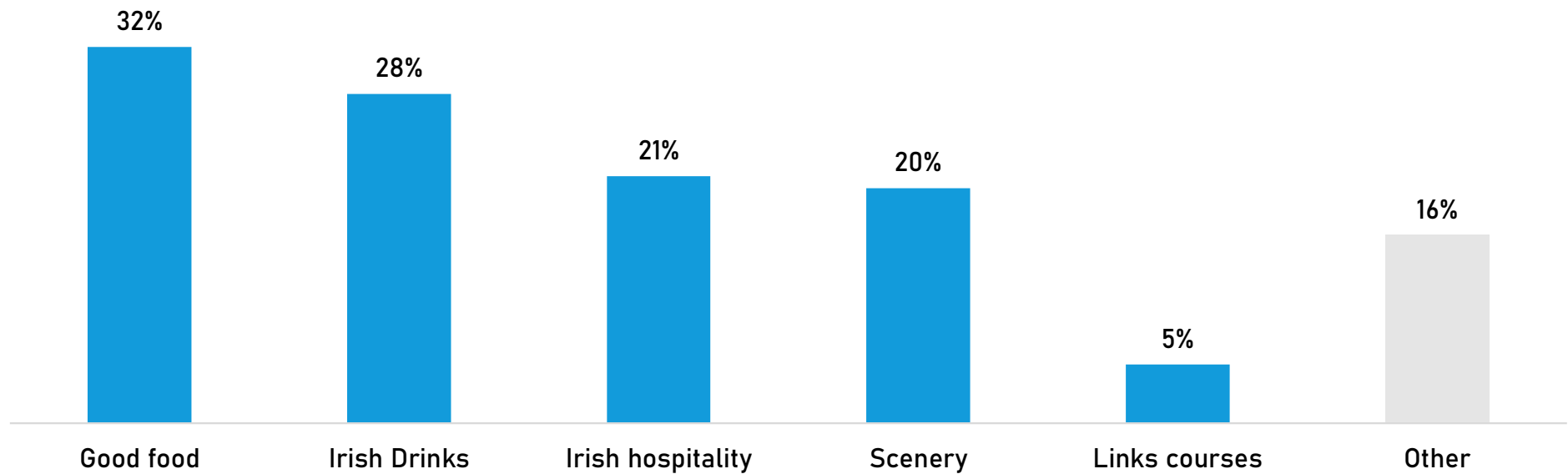
	GB	USA/Canada	ROW
Good courses	50%	40%	57%
Hospitality / people	30%	20%	19%
Food	20%	6%	19%
Scenery	10%	14%	10%
Visit Family & friends	7%	6%	14%
Family reunion/Trip	13%		5%
Package Deal		8%	
NI hosting the Open			10%
Try course hadn't been to		2%	
Other	7%	14%	

Good courses were most influential for ROW visitors followed by GB visitors. GB visitors tended to be more influenced by hospitality than others, while those from NA more likely to choose scenery.

Base: GB 30, USA/CA 50, ROW 21

CONSUMER FEEDBACK | Highlights

Q: Apart from today's round of golf, what were your main one or two highlights on this trip?



Putting golf aside the main highlights of the trip were the good food, followed by Irish drinks, hospitality and the scenery.

Base: 114

CONSUMER FEEDBACK | Areas of improvement

Q: Can you suggest any areas of improvement for the overall golf experience in NI?

NOTHING
DON'T KNOW
NO IDEA
NONE NO

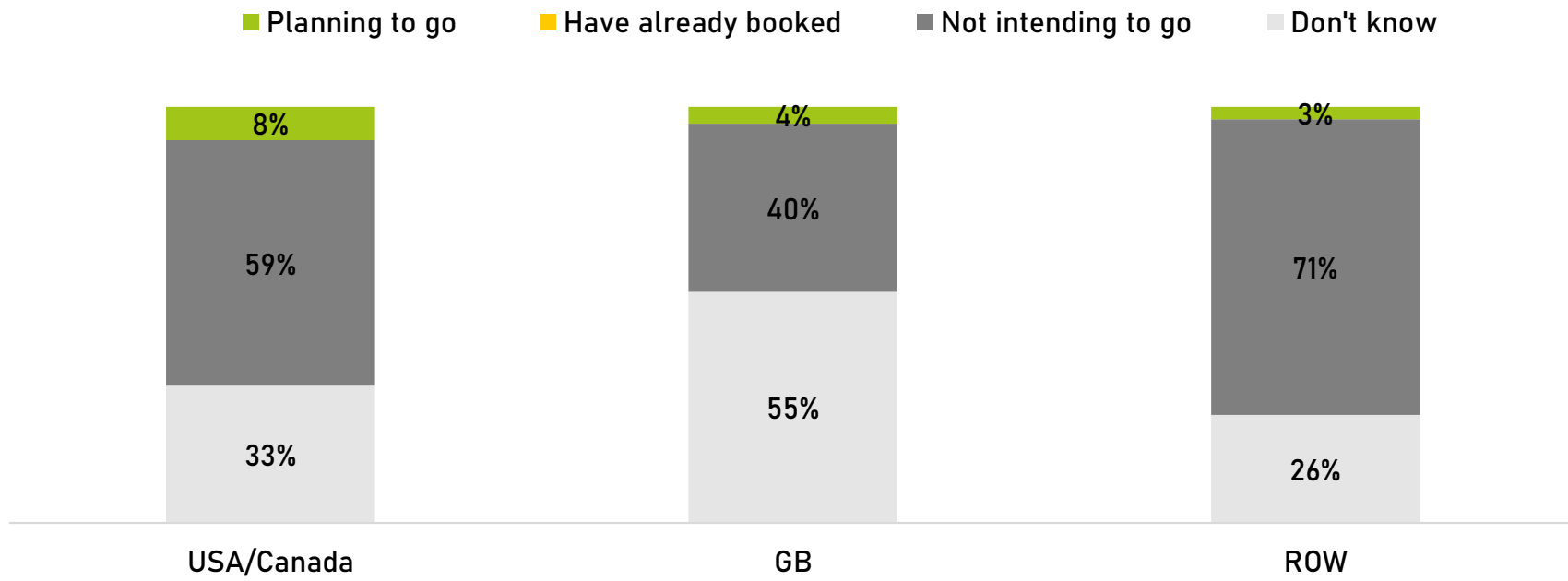
DON'T NEED ANY STAY AT COURSE
ALL LOVELY
NOT SURE
WEATHER

The vast majority could not think of how the overall golf experience in NI could be improved. Two people would have liked on-course accommodation while one other would like improved weather.

Base: 114

CONSUMER FEEDBACK | Open at Portrush in 2025

Q: Are you intending to visit the Open at Portrush in 2025?



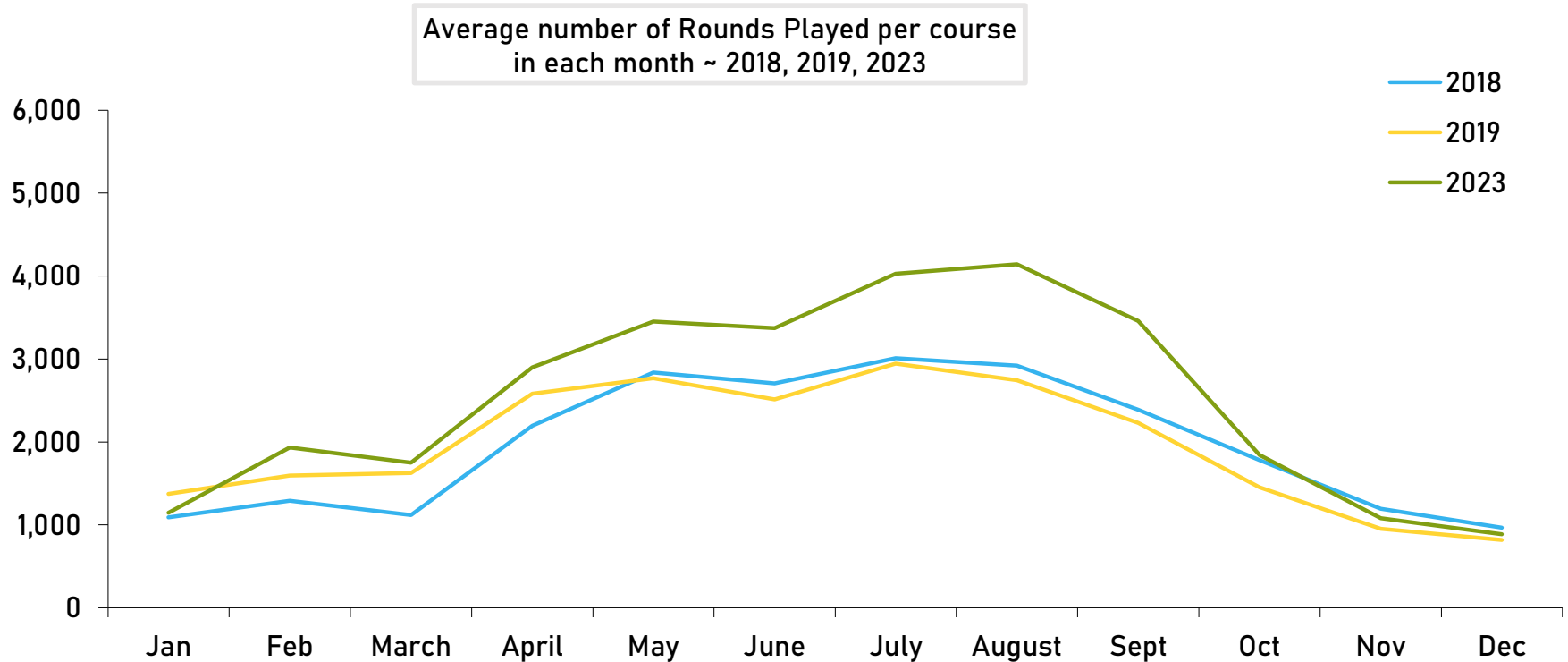
Nearly 1 in 10 (8%) from North America are already planning to visit the Open at Royal Portrush in 2025 two years out.

Base: GB 47, USA/CA 213, ROW 35

APPENDIX - STATE OF GOLF IN GB

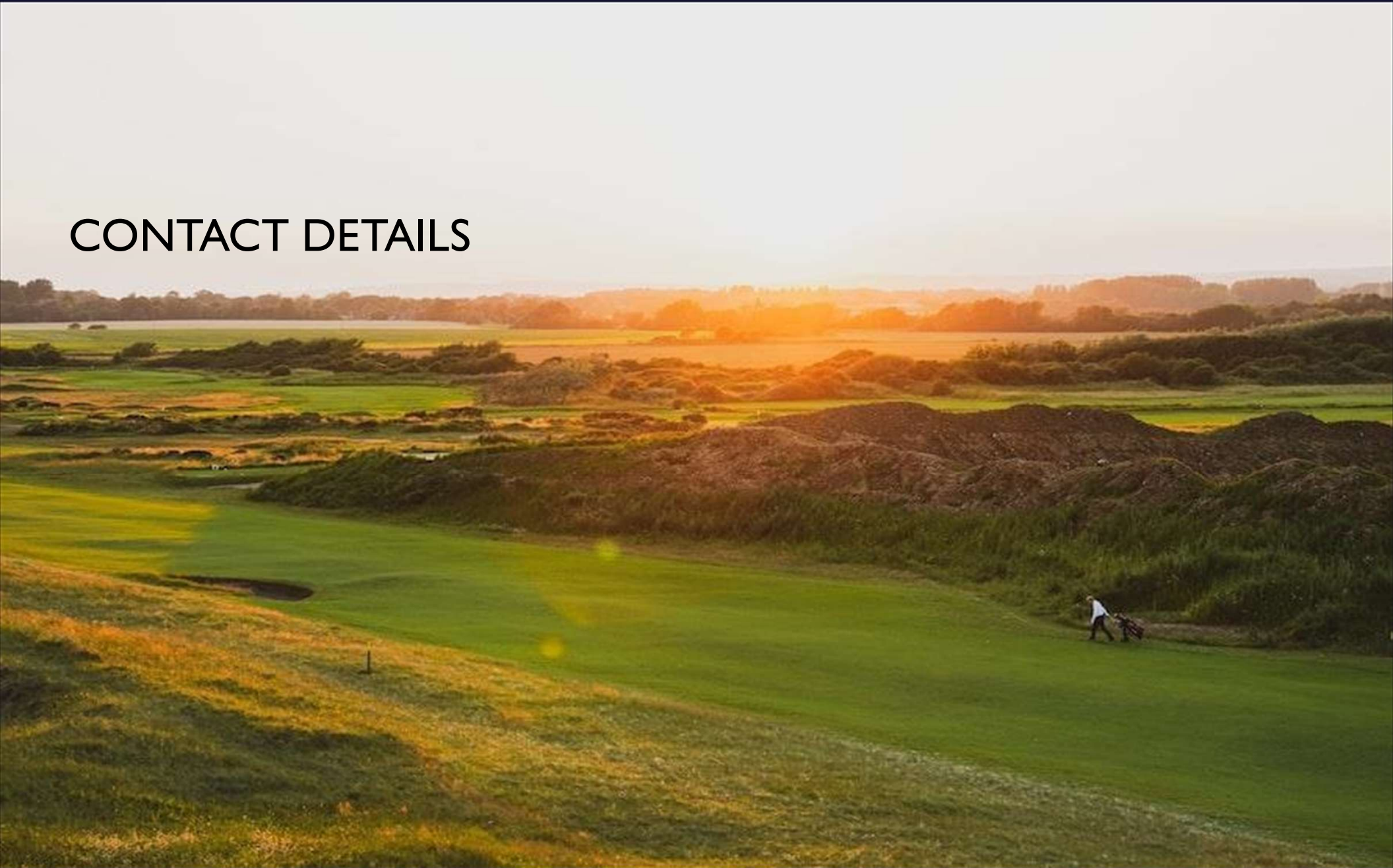


STATE OF GOLF IN GREAT BRITAIN



Rounds played per course in GB has increased, especially during peak months, since 2019.

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