A Strategic Review of Golf Tourism in Northern Ireland 2015 - 2020
# Table of Contents

**Introduction & Background** ............................................... 8  
Project Purpose ..................................................................... 8  
Strategy Development Process ............................................. 9  
Strategy Delivery and Implementation ................................. 9  

**Vision, Aims & Objectives** ............................................. 10  
Vision ................................................................................... 11  
Strategy Aims ....................................................................... 11  
Objectives ........................................................................... 11  
Where will the growth come from? ...................................... 11  

**Strategic & Market Context** ........................................... 12  
Golf Tourism Globally ......................................................... 12  
Golf Tourists and their Expectations .................................... 13  
Competitor Markets ........................................................... 13  

**Golf in Northern Ireland – How Does it Score?** ............. 19  
Existing Product ................................................................. 19  
Accommodation .................................................................... 20  
Golf Clusters ....................................................................... 20  
Golf Tour Operators ............................................................ 20  
Northern Ireland Golf Tourism Marketing ............................ 21  
Northern Ireland Golf Positioning ....................................... 21  
Northern Ireland Golf Communications and Messaging ....... 22  
Northern Ireland Golf Tourism Monitor 2013/14 ............... 22  
Product and Market Fit: A Case of Market Failure? ............ 23  
Why Northern Ireland? ....................................................... 23  

**Golf Tournaments and Events** ....................................... 25  
Golf Events in Northern Ireland ........................................... 25  

**Market Opportunities for Northern Ireland** .................... 30  
Key Geographic Markets ...................................................... 31  
Key Segments of Travelling Golfers for Northern Ireland .... 31  
How should Northern Ireland be promoted for growth? ...... 34  

**Delivering the Strategy** .................................................. 36  
Strategic Themes ................................................................. 36  
Action Plan ......................................................................... 38  
Measuring Success ............................................................. 40  
Financial Implications ......................................................... 41  
Organisations and their Roles ............................................. 42  
Risk Analysis ....................................................................... 43  

**Appendices** .................................................................... 44  
Appendix 1 Industry Consultations ....................................... 44  
Appendix 2 Characteristics of Key Segments of Travelling Golfers for Island of Ireland .......... 46  
Appendix 3 Northern Ireland Golf Tourism SWOT Analysis .... 48  
Appendix 4 Major Golf Events .............................................. 49  
Appendix 5 Information Sources ......................................... 50  

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Northern Ireland, as a golf tourist destination, is an unrealised opportunity
As a sport, as a business and as a tourism asset, golf operates on a worldwide scale - so there has never been a better time for Northern Ireland, the Home of Champions, to formulate a new strategy to tap into its potential.

As well as having three winners of golf’s major tournaments - Graeme McDowell, Darren Clarke and Rory McIlroy - Northern Ireland arguably has the best concentration of top golf courses in the world. In Royal County Down and Royal Portrush, we certainly have two of the world’s greatest links courses.

In recent times, the triumph of our golfers, the acknowledged quality of our courses and the widespread support for the game at the unprecedented sell-out of the Irish Open in 2012, have all brought the spotlight onto Northern Ireland as an exceptional golf destination.

Our status as a golfing centre of excellence will be increased further with the hosting of the Irish Open by Royal County Down this year, its return to Northern Ireland again in 2017, and indeed the prospect of holding the world’s biggest golf tournament, The Open Championship, by the end of the decade.

I am determined to see Northern Ireland tourism grow to become a £1 billion industry by 2020, and as golf is integral to achieving this objective, I see this strategy as both timely and welcome.

Extensive stakeholder engagement and consultations have yielded a fresh direction in what, until now, has been a limited strategic approach to golf tourism in Northern Ireland.

As research suggests that for every £1 spent on green fees in Northern Ireland a further £4 is spent elsewhere in the economy, the importance of golf tourism lies in attracting high spending visitors and dispersing their spending power throughout the visitor economy.

This golf tourism strategy provides a cohesive rationale and call to action to do just that. It will address areas of weakness, build on potential, promote the destination and capitalise on Northern Ireland’s visibility and success in golf to generate more real economic value.

The vision of the strategy is to grow the value of golf tourism to £50 million per annum by 2020, and in doing so to remind golfers worldwide that Northern Ireland is where golf champions are born and play.

That is a vision and a strategy I can fully endorse.

Arlene Foster MLA
Minister of Enterprise, Trade & Investment
Plans are in place to grow Northern Ireland’s overall tourism to £1 billion per annum by 2020
Executive Summary

Northern Ireland is experiencing unprecedented success and status as a golf destination, with two of the top golf courses in the world, Royal County Down and Royal Portrush, the triumph of Northern Ireland champions - Graeme McDowell, Darren Clarke and Rory McIlroy - and the highly successful hosting in 2012 of the Irish Open at Royal Portrush. This success will be capped in the next few years by decisions for the Irish Open to be hosted by Royal County Down in 2015 and Lough Erne Resort in 2017 and Royal Portrush being once again on the roster for The Open Championship from 2019.

This phenomenal success underpins Northern Ireland’s energised reputation as a country that delivers great golfers, great courses and great events.

But while globally golf tourism is estimated as a $32 billion per annum market, its value to Northern Ireland is estimated at only £33 million in 2014, leaving Northern Ireland trailing neighbouring destinations.

The importance of golf tourism lies in attracting high-spending visitors and dispersing their spend throughout the visitor economy. Research suggests that for every £1 spent on green fees, a further £4 is spent elsewhere in the economy. Golf tourism also contributes to the visibility and appeal of a destination for events.

This golf tourism strategy is designed to provide a cohesive and coherent rationale and call to action; to promote the destination and capitalise on Northern Ireland’s visibility and success in golf; and to generate more real economic value. Plans are in place to grow Northern Ireland’s overall tourism to £1 billion per annum by 2020. The golf tourism strategy is designed to support this aim by orchestrating the components that make Northern Ireland attractive to golf visitors; building on Northern Ireland’s reputation and visibility; and addressing areas of weakness and, of course, potential.

The strategy has been developed over the autumn/winter of 2014, with extensive stakeholder engagement and consultations, detailed in the main report.

Vision and Objectives

The vision for golf tourism is:

To grow the value of golf tourism from the current estimate of £33m p.a. to £50m p.a. by 2020 and, in doing so, to remind golfers worldwide that “Northern Ireland is where golf champions are born and play”.

The objectives of the strategy are:

1. Develop stronger clubs to participate in a dynamic quality assurance scheme (helping them focus on excellent service for visiting golfers).
2. Clustering and collaboration – to encourage and support local golf clusters to promote collaborative marketing and learn from each other.
3. Stimulate demand through a focused marketing campaign aimed at targeted golfers and geographic segments.
4. Optimise golfing events - maximise opportunities from golf events up to 2020 and position Northern Ireland as able to accommodate major golf tour events post-2020.
5. Leadership, advocacy and champions - stimulate industry leadership to encourage engagement and commitment to the shared vision.

The Market Context

This is explored in detail in the main report but the substantive issues lie in the continued growth in competitor destinations, investment (worldwide) in new courses, and golfers’ interest in deciding where to play golf based on price, quality of courses and accessibility.
Golf in Northern Ireland

There are 94 golf courses in Northern Ireland, of which 31 are quality-assured by Tourism Northern Ireland. Of these, two are amongst the best-quality golf courses in the world: trophy courses which the North American market wants to play. While Northern Ireland offers a variety of choices – links and parkland – at different pricing bands, its reputation is for links courses. The majority of courses are private members’ clubs: the significance is that private clubs generally have restricted visitor access, especially at weekends, with key times of day reserved for members. So the key issue with the clubs is which ones are willing, or might be in the future, to generate additional revenue from participating in the golf tourism market.

Northern Ireland Golf Positioning

The success of Northern Ireland’s champion golfers Rory McIlroy, Graeme McDowell and Darren Clarke prompts the need to look at Northern Ireland’s golf positioning and to consolidate Northern Ireland’s profile in the market place as a golf tourism destination with great golfers and great courses.

The geographical market priorities remain, as now:

- North America (USA & Canada)
- Great Britain (GB)
- Ireland (ROI)
- Europe (with Scandinavia/ Germany the primary markets, supported by other secondary markets of the Netherlands, France, Belgium, Switzerland, Austria, Spain and Italy)

While there is an overlap between geographical and demographic market segments, Northern Ireland will appeal to the following players: trophy hunters, four-balls, couples’ golf, value golf seekers, society golf, and corporate golf.

The Northern Ireland Golf positioning “Northern Ireland Made for Golf” was created for this purpose. It promotes a clear, straightforward and consistent message, contributing to a strong recognisable identity and promoting a sense of place for golf in Northern Ireland.

There is good access into Northern Ireland from GB and ROI for golfers, but two factors have implications for the way Northern Ireland is positioned for golf:

- The opportunity for European, US and further-off markets to access the island of Ireland via Dublin for golfers, whilst fewer direct air access destinations exist to Northern Ireland;
- The mistaken belief amongst some managers of parkland courses that they have limited appeal to visitor markets.

The implications for Northern Ireland lie in:

- The need for Northern Ireland to balance its positioning for various geographic markets – in more distant markets, it is seen as part of the island of Ireland golf offer and this gives advantages of visibility and profile.
- In closer geographic markets (GB and ROI), Northern Ireland can, and should, differentiate itself from the rest of Ireland, maintaining the standout of its golf proposition, in part because these markets will be more knowledgeable about Northern Ireland and because, for these markets, Northern Ireland is more likely to be competing with the rest of Ireland.

The main report also details other market opportunities for Northern Ireland.

Golf Events

Major golf events are key economic drivers. The Northern Ireland Open, the 2012 Irish Open, the planned 2015 and 2017 Irish Opens and a post-2019 roster for The Open Championship for Royal Portrush have significant beneficial impacts for Northern Ireland. While there is a need to look at major tour events post-2020, no more should be bid for before then.

There are currently a number of amateur events happening in Northern Ireland each year, e.g.:

- Causeway Coast Golf
- Down Spring and Summer Links
- Lough Erne & Links Challenge
- The Great North Links Challenge
These bring visitors into Northern Ireland and therefore ways should be found to provide business development and marketing support to help sustain them and enhance their profile and visitation. Equally, a number of other prestigious amateur tournaments might be competed for to showcase Northern Ireland and generate continued profile and visitation.

**Delivery of the Strategy and Associated Actions**

The marketing of Northern Ireland for golf should be based upon a number of functions, including:

1. A three-year marketing and communications plan to ensure consistent delivery in identified markets.
2. A communications plan to include PR, social media and familiarisation visits.
3. Engagement and involvement of the golf and tourism trade in marketing and sales.
4. Tourism Northern Ireland facilitation and collaboration role: with trade, with Tourism Ireland and with golf tour operators.
5. A consumer-facing golf destination website that inspires, informs and directs the consumer.
6. Encourage more clubs to participate in the Golf Monitor to allow clubs and Tourism Northern Ireland to track performance.
7. Build the role and function of the quality assurance scheme for golf clubs – using this as a threshold to identify those clubs who want to contribute to golf tourism – to grow their visitation and revenue.
8. Specific roles for specific organisations – Confederation of Golf in Ireland (CGI), Sport Northern Ireland, etc.
9. To promote golf industry leadership in Northern Ireland, with the members of the Golf Advisory Group leading the recruitment of ambassadors and advocates for golf tourism and golf investment.

There are five interrelated strategic themes and associated action plans:

1. Developing stronger clubs – strengthening the capacity of the clubs to accommodate visiting golfers.
2. Clustering and collaboration across the golf industry to help develop individual clubs and generate collaborative marketing.
3. Stimulating demand through a medium- to long-term marketing and promotions campaign.
4. Optimising Northern Ireland’s position through golf events.
5. Leadership, advocacy and building on the role of the golfing champions.

**Measuring Success**

What will success look like? The Golf Tourism Monitor provides the basis for evaluating success, especially if Tourism Northern Ireland can convince more clubs to participate. Future success will be demonstrated by growth in the value of golf tourism; more packages and products taken to market; the success of the branding (both dimensions of the island of Ireland golf and “Northern Ireland Made for Golf” identities); and more clubs and courses participating in golf tourism.

Crucially, building and sustaining Northern Ireland’s golf reputation is the key outcome, up to and beyond 2020.
Introduction & Background

Northern Ireland is experiencing unprecedented success and status as a golf destination, with two of the top golf courses in the world, Royal County Down and Royal Portrush, the triumph of Northern Ireland champions - Graeme McDowell, Darren Clarke and Rory McIlroy1 - and the hosting in 2012 of the Irish Open at Royal Portrush.

The decision for Royal County Down and Lough Erne Resort respectively to host the Irish Open in 2015 and 2017 is capped by Royal Portrush being once again on the roster for The Open Championship from 2019. This phenomenal success underpins Northern Ireland’s energised reputation as a country that delivers great golfers, great courses and great events.

And yet, while international golf tourism is estimated as a $32 billion per annum market2, Northern Ireland’s Golf Tourism Monitor estimated the value of golf tourism in 2014 at £33 million. Even if this is an underestimate (research by the University of Ulster Business School suggests so), Northern Ireland still trails neighbouring destinations significantly (Scotland £220 million, ROI €200 million and Wales at £38 million per annum).

Golf tourism’s importance lies in attracting high spending tourists and dispersing their spend throughout the visitor economy. VisitScotland research suggests that for every £1 spent on green fees, a further £4 is spent elsewhere in the economy.

Golf tourism also contributes to the visibility and appeal of a destination for events (evidenced by the committed 2015 and 2017 golf events in Northern Ireland) and as a quality tourism destination.

Among Northern Ireland’s 88 golf clubs, 31 are quality assured. While most recognise the benefits of golf tourism, including revenue streams, in the current economic climate, many find it difficult to invest in marketing and in the welcome to encourage more visiting golfers.

Bringing together all the golfing bodies into the Confederation of Golf Ireland and debating how development of the game and enhanced performance can be achieved across the island of Ireland is a good foundation for supporting participation and performance and developing stronger sustainable clubs.

The major focus of this strategy for golf in Northern Ireland is about growing the volume and value of international golf visitors (“Out of State”). That said, the domestic market (through members and domestic visiting golfers) underpins the financial viability and sustainability of many golf courses in Northern Ireland.

Project Purpose

Northern Ireland lacks a cohesive strategy to promote itself as a golf destination and take advantage of its visibility and success in golf. In order to generate more real economic benefit from golf, the Northern Ireland Tourist Board3 commissioned BTS and IAGTO4 to develop the Golf Strategy for Northern Ireland to 2020.

Apart from Tourism Northern Ireland’s support for and intervention in the golf market, there is limited co-ordinated activity to develop golf tourism. Some local authorities do a limited amount of promotional work or help clubs in their area to access tourist market information.

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1. Especially with his 2014 Open Championship win and being named 2014 European Tour golfer of the year
2. Hudson and Hudson, 2010
3. from February 2015 now known as Tourism Northern Ireland
4. International Association of Golf Tour Operators
There are no golf clusters in Northern Ireland, although some individual golf venues have either joined forces to offer packages or have taken initiatives to group their courses together around accommodation providers.

In summary, there is a limited strategic approach to golf tourism in Northern Ireland with individual golf clubs either ‘doing their own thing’ or not participating in the golf visitor market. Tourism Northern Ireland’s role to date has been to develop the quality assurance system for golf clubs and undertake marketing on an occasional basis.

Thus the purpose and aim of this golf tourism strategy is to identify the way forward; precise actions to support existing commitments (the golf events for instance); and the further development and promotion of Northern Ireland’s golf, working and aligning with golf authorities and other stakeholders. This is the moment to capitalise on the reputation of Northern Ireland’s champions and its premier courses.

**Strategy Development Process**

The strategy has been developed over the autumn of 2014, with extensive stakeholder engagement and consultations. Those consulted are detailed in the appendices. The consultations were designed to collect views and ideas about the vision and needs of the sector, current challenges, and what would help develop performance. An online survey, mystery shop of golf clubs, workshops, face-to-face meetings with stakeholders and national organisations have all contributed significantly to the thinking.

**Strategy Delivery and Implementation**

To realise the potential of golf tourism for Northern Ireland, the successful implementation of the strategy requires:

- Industry (golf clubs and tourism businesses) and the public sector all to make significant organisational and resource contributions, sustained over the five years of the strategy.

- The Golf Advisory Group to champion the strategy and inspire all stakeholders, in order to deliver strong, effective leadership at all levels across the industry and encourage collaboration in developing memorable golfing experiences and the delivery of the highest levels of service excellence.

- Improving links and synergy with the wider tourism offering of Northern Ireland, adding value to visitors’ experiences and maximising and spreading the economic impact from the sector.

- Funding resources allocated to golf tourism development need to be significantly increased from the current funding levels.

Golf tourism’s importance lies in attracting high spending tourists and dispersing their spend throughout the visitor economy.
The tourism sector as a whole is seen as offering Northern Ireland growth and employment prospects. There are ambitions to grow tourism in Northern Ireland to a £1 billion industry by 2020, growing its overall tourism performance and enhancing its products and appeal in a wide variety of markets. The golf tourism strategy is designed to support the golf sector’s contribution to that wider tourism vision by orchestrating the components that make Northern Ireland attractive to golf visitors; building on Northern Ireland’s reputation and visibility; and addressing areas of weakness and, of course, potential.

The timing of the strategy and building on Northern Ireland’s success must be now. In a competitive environment – in terms of both destination success and player reputation – there are always possibilities of advantages being lost. This is why it is important to ensure that the actions emanating from the strategy are delivered, in order to maintain competitive advantage.

The Golf Tourism Strategy has been designed to be of value, by setting out a clear ambition and identifying necessary actions within a comprehensive framework. It must demonstrate to golf clubs, tourism businesses, government and public agencies that golf tourism will contribute to the wider Northern Ireland tourism vision of growing overall tourism performance, enhancing its tourism products and appeal in a wide variety of markets.
The Vision

The vision for golf tourism is:

To grow the value of golf tourism from the current estimate of £33m p.a. to £50m p.a. by 2020 and, in doing so, to remind golfers worldwide that “Northern Ireland is where golf champions are born and play”.

The Strategy Aims

The aims of the strategy are to:

1. Grow the value of golf visitation to Northern Ireland to £50 million per annum by 2020.
2. Develop the capability and capacity of clubs to host visiting golfers.
3. Enhance the reputation and visibility of Northern Ireland for golf tourism in designated markets.
4. Build Northern Ireland’s capacity to host golf events.
5. Support industry leadership and collaboration across the sector.

Objectives

The objectives of the strategy have been grouped into five components:

1. Develop stronger clubs to participate in a dynamic quality assurance scheme to help them focus on excellent service for visiting golfers.
2. Clustering and collaboration: to encourage and support local golf clusters to promote collaborative marketing and learn from each other.
3. Stimulate demand through a focused marketing campaign aimed at targeted golfers and geographic segments.
4. Optimise golfing events: maximise opportunities from golf events up to 2020 and position Northern Ireland as able to accommodate major golf tour events post-2020.
5. Leadership, advocacy and champions: stimulate industry leadership to encourage engagement and commitment to the shared vision.

The strategy objectives are supported by a series of actions which are detailed on pages 38 and 39.

Where will the growth come from?

Growth in the value of golf tourism to Northern Ireland will come from:

- Higher visibility from better co-ordinated marketing campaigns;
- Building on the stature and reputation of the golf champions with whom Northern Ireland is associated;
- Concerted action by public authorities and golf clubs themselves working with tour operators to put more packages into the market place;
- Ensuring where capacity exists on links and parkland courses, that capacity is promoted in the marketplace, through tour operators and online travel agents (OTAs);
- Encouraging golfers from GB, Ireland and elsewhere in Europe to play Northern Ireland’s parkland courses, where substantial capacity exists.
Global competition for golf tourists is intense. To succeed, Northern Ireland must find a difficult balance in positioning itself within various geographic markets: at one level (in more distant markets) it is seen as part of the island of Ireland golf offer which gives advantages of visibility and profile.

As a sport and as a business, golf operates on a huge scale. National golf union data shows that some 60 million golfers worldwide play on close to 30,000 courses across the planet.

Golf events are said to be worth close to $2 billion a year, and the golf tourism market something more than $32 billion.

SOURCE: GOLF’S 2020 VISION, HSBC, NGF, HUDSON & HUDSON

In the GB and ROI geographic markets, Northern Ireland can, and should, differentiate itself from the rest of Ireland to maintain the standout of its golf proposition, in part because these markets will be more knowledgeable about Northern Ireland and because Northern Ireland is more likely to be competing with the rest of Ireland.

This means that the positioning and messaging of golf in Northern Ireland has to be appropriate to its markets. A further difficult balance then has to be found to translate the messaging and profile for each market into a suitable and effective brand architecture.

Golf Tourism Globally

The worldwide market for international golf travel is buoyant and, despite the recent economic downturn, has continued to grow. Global golf holiday sales by IAGTO operators grew by 9.2% (following 9.3% in 2012 and 11.1% in 2013): three years of consecutive growth.

Forward bookings at the end 2014 were up 9.5% globally year on year.

The 2014 IAGTO survey of 350 golf resorts, golf courses and golf hotels worldwide revealed that golf tour operators remain the primary driver of golf holidays globally, with the suppliers themselves reporting that at least 52% of their golf visitors were booked by golf tour operators.

In an ever-increasing competitive global golf tourism market, suppliers and destinations benefit from a combination of direct marketing to consumers and tour operator sales. It is in every supplier’s interests to ensure that both direct sales and operator sales efforts are as effective as possible.

Worldwide golf holiday sales by golf tour operators have grown by more than 20% over the past two years.

It is estimated that golf tour operator members of IAGTO control more than 85% of golf holiday packages sold worldwide and turnover more than €1.8 billion per year.

Even in the era of online reservations and customer reviews, golf tour operators play an important role for many travelling golfers, offering reliable advice on all aspects of a trip, from travel to dinner reservations and everything in between.

In many instances, long-haul golf consumers prefer to book their golf vacation through their local golf tour operator who, they know, will protect them financially, handle all the details and manage any changes.
Golf tourists and their expectations

The KPMG Travel Insights 2013 study identified that the biggest golf travellers are still the British, the Americans and the Canadians, although many of them choose domestic trips. Scandinavians (mainly Swedish), Germans and Austrians are also nationalities with a high number of golfers travelling abroad each year. In recent years the golf visitor market has become more price-sensitive and the overall cost has become a key decision-making factor when booking a golf trip.

The quality of courses, accommodation, additional local experiences (food & drink, etc.) and more value for money are key motivators for golfers. Availability of direct flights and accessibility to golf destinations continue to be important factors.

Social networking has changed how travellers research trips, make decisions and share experiences: golf tourists are no exception. Golf tourists are strongly influenced by referrals on Facebook, Twitter, TripAdvisor and various other golf and travel blogs.

The KPMG Travel Insights 2013 study identifies three key factors for golfers when choosing a golf destination5:

1. Price
2. Quality of courses
3. Accessibility

Competitor Markets

There is increasing competition from rival destinations for the golf tourism market. Over the past ten years, a number of destinations have created joint promotional entities and golf tourism strategies. Examples include Scotland, Wales, South Africa, Thailand, Malaysia, Puerto Rico and Mexico.

Countries which have little in the way of a golf tradition have also started to invest in courses as a way of supporting their tourism strategy. Vietnam, for example, has constructed a number of luxury courses, including the Ho Chi Minh Golf Trail which connects six luxury golf courses and resorts.

International golf destinations can generally be classified into two categories: destinations with a high-quality golf experience and destinations which attract out-of-season golfers due to their climate. Northern Ireland generally attracts golfers because of the quality of courses, especially links courses (evidenced by the University of Ulster research).

Whist having two of the world’s leading golf courses in Northern Ireland, it should also be recognised that a number of competitor destinations also have at least two world-ranked courses (Scotland / Ireland / England & Wales / USA (East & West Coast) /South Africa)

Near Neighbour Competitors

Northern Ireland’s near neighbour competitors are Scotland, Ireland, Wales and England.

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5. Source KPMG Golf Insights Survey
Scotland

Golf tourism is estimated to generate £220 million of economic benefit to Scotland.

Scotland promotes the destination as ‘The Home of Golf’, with an international reputation based upon its links championship golf courses. The infrastructure for golf tourism is in place, with four-star and five-star hotels built as golf resort facilities. The trophy courses are located predominantly in three regions and demand for them in peak season is high. That pushes up prices, making golf in Scotland a relatively expensive holiday for the tourist. The number of direct flights into Scotland from North America and Europe has increased in recent years and there is now good accessibility to all areas of Scotland.

In the lead-up to The 2014 Ryder Cup, Scotland invested extensively in golf. VisitScotland increased existing golf tourism marketing campaigns to use The 2014 Ryder Cup to promote Scotland in key domestic and international markets. Since 2002, VisitScotland has spent a minimum of £500,000 per annum promoting Scotland to the key golfing markets of North America, Scandinavia, Germany, the UK and Ireland.

As part of Scotland’s benefits as host of The 2014 Ryder Cup, VisitScotland secured presence at a number of European Tour events from 2009 to 2013, gaining access to exhibition space, hospitality and advertising. In total, VisitScotland and its public sector and private partners attended more than 40 European Tour events in this period.

VisitScotland also delivered the biggest-ever golf consumer presence in North America at The 2012 Ryder Cup at Medinah, with some 10,000 people visiting its exhibition space during the week of the competition.

Scottish Enterprise, the economic development agency, also supports the golf industry with a number of interventions, including business development support, social media training and encouraging golf courses to adopt online tee booking. Funding was also provided to regional and national initiatives designed to support the industry.

With funding support from Scottish Enterprise, there are now six regional golf clusters operating in Scotland and a number of collaborative marketing initiatives.

The Scottish Golf Union and the Scottish Ladies’ Golfing Association support Scottish golf clubs with a series of intervention mechanisms, e.g. business planning, membership marketing, social media and service quality and have partnered with Club Managers Association of Europe to deliver management development programmes.

The Scottish Golf Tourism Strategy – Driving Forward Together was developed by the industry and was launched in September 2013. It is monitored and implemented by the Scottish Golf Tourism Development Group.

Republic of Ireland

Through the 1990s, Ireland improved its golf course supply significantly, using European Funding to good effect. It now boasts good trophy links courses and has strong historical ties with the USA. This is supported by an excellent scheduled air service from the USA and Europe. Direct access to North America from Dublin and the US Customs clearance are significant positive factors for this market. The strength of sterling against the euro works in Ireland’s favour, as does the reduced Airport Passenger Duty and VAT for tourism businesses.

Ireland currently has 332 golf clubs affiliated to the GUI (Golfing Union of Ireland), of which 47 are links golf courses. Fáilte Ireland research (2012) estimated 163,000 overseas golfers visited Ireland in 2012, generating approximately €202m.

Recent University of Ulster research identified that at least 37.62% of that figure is directly related to “links golf” and 12.6% of the golf clubs in the Republic of Ireland (42 out of 332) produce just under 50% of the total international golf visitor income.

According to Fáilte Ireland, golfers are amongst the most valuable visitors to Ireland, spending an estimated €1,200 per person on each trip: more than 2.5 times the expenditure of the average overseas visitor. This ties in with data gathered by IAGTO from a number of countries which shows that golf travellers spend 2.2 times more than the average general leisure visitor.
There is a perception that the Irish ‘friendliness and hospitality’ enhances the visitor experience greatly and perhaps outmatches competitors. The social interaction after golf – the 19th hole, pubs and ‘craic’ factor – makes Ireland more fun off the course than any competitor.

There are three well-established golf clusters operating in the Republic;

- South West Ireland Golf (SWING)
- North & North West Coast Links (NNWCL)
- Dublin East Coast Golf Alliance

While the motivation for the clusters emanated from both a marketing and a business development perspective (exchange experience, learn from each other, etc.), the outstanding rationale for the clusters now is to provide additional marketing leverage. This is done by identifying regional groups of attractive golf courses; helping spread visitation across the golf courses in each cluster; and heightening visibility and market penetration. SWING and NNWCL are mature clusters and now operate more as golf tour operators, providing a strong marketing emphasis for the clubs with whom they work.

The 2006 Ryder Cup showed Ireland could plan and deliver a huge event and there was most definitely a boom before and during the event when many nationalities visited. A cautionary note, however, from IAGTO communications with its supplier members in Ireland and international golf tour operators:

“Rapid escalation of prices, particularly green fees, in the lead-up to and immediately after The Ryder Cup, coupled with an increase in obstacles to the close of sales internationally and the lack of an industry-wide positioning strategy in the run-up to The Ryder Cup, precipitated an immediate drop in golf holiday sales to Ireland post-Ryder Cup and pre-economic crisis. One rolled into the other but the downturn of golf visitor revenue did not begin with the economic crisis but preceded it and created conditions for the ‘perfect storm’.”

In summary, IAGTO golf operators’ sales to Ireland declined significantly post-2006 and only returned to 2006 levels in 2013/14.
Wales

Golf has been a key area of work for Visit Wales (formerly Wales Tourist Board) over the last 10 years and is fully integrated into all aspects and areas of Visit Wales's work, including marketing and promotion and development and training.

Wales has over 200 golf facilities, of which 115 are 18-hole courses, but does not have the stock of trophy golf courses enjoyed by Scotland, Ireland and England. However, research by Visit Wales identified that Wales has several golf courses of that type that can rank alongside the best in Scotland and Ireland.

Wales has three golf resorts where on-site accommodation of four-star or five-star standard is combined with the full range of visitor facilities, including golf courses, conference and banqueting facilities and leisure clubs.

The evidence of the impact of golf tourism in Wales is positive, with a growth in golf tourism from 2002, when there were only a reported 30,000 golf visitors and an economic impact of £4 million, to now 196,000 golf visitors (including day visitors) and a £38 million economic impact.

The catalyst for this growth was the decision to bid for and win The 2010 Ryder Cup which presented Wales with the opportunity to develop its place in the golf world over a 10-year period. Between 2004 and 2013, there has been a net 41% increase in the total volume of golf visitors to Wales, while total related expenditure has risen by 65%.

The benefits for Wales in golf tourism terms are evident and an additional £2 million legacy fund, where 40 projects across Wales helped to develop public facilities and encouraged people to get into golf. The Golf Development Wales (GDW) group was also formed to encourage participation. To support the development of the game, Visit Wales focused on four themes:

- Improving the quality of service within golf clubs through a small grants scheme to encourage clubs to invest in facilities/equipment and the development of caddy programmes in consultation with clubs that have the greatest demand.
- Developing expertise, professionalism and knowledge of golf tourism within golf clubs by creating a toolkit to assist clubs gain better access to support, and introducing training programmes to motivate clubs and provide training to develop their business.
- Working with key golf businesses and other external agencies to fill identified product
- Supporting UK and overseas tour operators in developing golf tour programmes to Wales.

Golf clusters are a strong legacy of The Ryder Cup. Around 10 golf clusters have now formed in Wales, whereby local accommodation providers and golf clubs work together to provide packages for the visitor, making it easy to book a golf holiday in Wales.

England

England is home to approximately 50% of Great Britain and Ireland’s top 100 golf courses but has not had a coordinated approach to market and develop the multi-million English golf tourism industry that exists in the country. England’s golf offering is a strong and variable one. There are over 1,750 golf courses: four courses are on the current Open Championship roster, while two other courses have staged the event in the past. England has also staged The Ryder Cup 14 times over nine different courses and plays host to The European Tour’s flagship event, the BMW PGA Championship.

In 2014, a new industry-led organisation, Golf Tourism England, was established within the golf travel industry, with the aim of promoting England as one of the most outstanding golfing destinations in the world. Visit England is supporting the venture too, so that the profile of English golf courses can be promoted on the same parallels as Scotland and Ireland at major golf shows and events.

With (to date) no formal approach to golf tourism, the development of clusters in England is limited. There are, however, examples of clubs taking the lead and forming collaborative marketing groups. These include:

- England’s Atlantic Links: the six leading links courses in south-west England
- England’s Golf Coast includes 12 golf courses (two of which are Open Championship venues) and seven courses in the ‘Top 100 Courses of the UK & Ireland’
Worldwide golf holiday sales have grown by more than 20% over the past two years.
Northern Ireland has 94 golf courses spread across the Province, 69 are 18-hole and 25 are 9-hole courses.
Golf in Northern Ireland – How Does it Score?

Existing Product

Northern Ireland has 94 golf courses spread across the Province, 69 are 18-hole and 25 are 9-hole courses. Of these, two are amongst the best-quality golf courses in the world. While Northern Ireland is recognised, especially by the North American market, as having premier links courses, the majority of courses are actually parkland. Of the 94 courses, 31 are Tourism Northern Ireland Quality Assured.

<table>
<thead>
<tr>
<th>Type of Courses</th>
<th>No. of courses</th>
<th>No. of 18-Hole</th>
<th>No. of 9-Hole</th>
<th>Clubs in QA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Links</td>
<td>6</td>
<td>5</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>Links / Parkland</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Links - Trophy</td>
<td>2</td>
<td>2</td>
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<td>2</td>
</tr>
<tr>
<td>Parkland</td>
<td>79</td>
<td>55</td>
<td>24</td>
<td>20</td>
</tr>
<tr>
<td>Resort - Parkland6</td>
<td>4</td>
<td>4</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Clifftop Parkland</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Seaside / Parkland</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>94</td>
<td>69</td>
<td>25</td>
<td>31</td>
</tr>
</tbody>
</table>

While the variety and range of golf courses in Northern Ireland mean that Northern Ireland is able to offer a broad range of choices – links and parkland – at different pricing bands, it is perhaps fair to suggest that Northern Ireland’s reputation is for its links golf experiences. The implications for the total range of (links and parkland) courses are explored further below.

Private members run the majority of courses in Northern Ireland: this means that private clubs generally have restricted visitor access, especially at weekends, with key times of day reserved for members.

However, only those facilities that offer 18 holes or more are likely to appeal to the golf tourism market. The smaller courses and driving ranges may support the attractiveness of an area for golf but will not attract visitors in their own right.

Given its location, Northern Ireland is competing directly with near neighbour destinations - Scotland, England and Ireland - for golfers from all market segments.

In some markets, Northern Ireland might not be seen as a first preference destination for golfers but rather an ‘undiscovered’ golf destination, where the awareness and knowledge of the Northern Ireland Golf and visitor experience is relatively unknown.

The exception is the North American market, where the two premier courses of Royal County Down and Royal Portrush and other links courses are the primary motivators to visit.

Utilisation of courses across the country is naturally highest from April to October, with September the peak month for links courses. Golf is available in Northern Ireland all year round, although generally visiting golfers are attracted during the April to October period. During the peak months, the most popular links courses find that some bottlenecks develop. However, with the general exception of the two trophy courses, there is significant capacity for growth during peak season across all courses, including links. University of Ulster research demonstrated that across Ireland, links courses generally have capacity, apart from some bottlenecks in peak months which need managing.

6. There are three resorts: Lough Erne, Roe Park and Hilton Templepatrick
7. See page 31 for key segments
8. University of Ulster research 2014
As much as the quality of the courses, what matters to the golf visitor are the visitor facilities in the clubhouse and changing rooms; ease of access to the golf course; good hotel accommodation; and a warm welcome from experienced staff. Again, generally, most courses that currently attract visiting golfers are able to offer these facilities. However, it should be emphasised that because Northern Ireland is represented by fewer golf tour operators, this information does not get high visibility, putting Northern Ireland at a disadvantage.

The quality and services provided by existing golf courses varies considerably, especially those not currently appealing to visiting golfers. Many of the courses are managed and operated by volunteer committee members and there are both financial and personnel resource limitations for the clubs to manage and operate as a business. Essential to the visitor experience are the skills and knowledge of all those involved, including golf tour operators, in delivering the total experience to the visitor.

One of the biggest challenges is ensuring golf clubs embrace the changes needed to make their clubs more welcoming. The role of CGI in supporting clubs through the business development process is crucial to the future sustainability of clubs and their receptiveness to accommodating visiting golfers. Tourism Northern Ireland has, through the Quality Assurance Scheme, helped many clubs to understand the expectations of the visiting golfer and how to enhance their experience.

### Accommodation

Whilst the review of accommodation was outside the terms of the brief, the quality of bedrooms and their proximity to a golf course are major influences in the decision a golf visitor will make about where to play.

The industry identified the following gaps in the accommodation offer, linked to golf:

- Lack of infrastructure, particularly four- and five-star hotel accommodation in key locations and on-site facilities
- Lack of five-star resort accommodation
- There are currently only three resort venues with accommodation of sufficient scale to host more than small numbers of tourists

### Golf Clusters

Desk research of competitor destinations and across the world clearly indicates that the visiting golfer from whichever market does not, by preference, tend to change their base each day. By choice, they stay at a hotel with golf on-site or accessible, and additionally play at other courses in the area, usually within a 30 to 60-minute drive time.

There are currently no golf clusters established in Northern Ireland, although some individual golf venues have either joined forces to offer packages or have taken initiatives to group courses together around accommodation-based courses.

Golf clusters support and encourage clubs to help raise the capability and contribution of clubs to golf tourism through mutual self-help. Clusters would also become regionally-based, self-marketing groups, helping raise profile and visitation.

### Golf Tour Operators

IAGTO undertake an annual survey of their golf tour operator members. The survey includes specific questions on Ireland and Northern Ireland golf tourism.

The headline figures of IAGTO golf tour operators in each market selling Ireland are:

- 560 golf tour operators in 62 countries
- 278 in 44 countries feature, promote and sell Ireland
- 104 in 29 countries feature, promote and sell Northern Ireland

Only 37% of golf tour operators selling Ireland also feature and sell Northern Ireland (or report that they feature and sell Northern Ireland). This discrepancy may be due in part to an operator’s perception of the branding of the island of Ireland as already one golf destination. Ireland has built up a position of great interest for itself in many countries around the world as a golf destination for avid golfers, as the broad spread of golf tour operators featuring Ireland shows.

Golf tour operators focus on those key markets delivering the highest volume of golfers. They are an important element for Northern Ireland to achieve the objectives of growing the volume and value of its golf tourism.
However, it should be noted that one of the findings of IAGTO’s golf tour operators research highlighted that GTOs were quite clear that Northern Ireland was a more expensive option than ROI. Exchange rates and VAT were seen as the main reasons.

**Northern Ireland Golf Tourism Marketing**

The current profile of golf in Northern Ireland has been improved immeasurably by the exploits of Rory McIlroy, Graeme McDowell and Darren Clarke. Their success has positioned Northern Ireland on the global map as a golf holiday destination with the opportunity for visitors to follow in the footsteps of the great players whilst playing quality golf courses set amongst beautiful natural landscapes.

With these competitive advantages, Northern Ireland has achieved benefits, albeit small-scale, but has suffered from lack of industry cohesion and a strategic co-ordinated marketing plan. Tourism Ireland’s golf promotional campaigns are extensive, incorporating all marketing mediums, while Tourism Northern Ireland was unable to fully realise the advantages due to limited resources to support overseas marketing activity. Equally, this resourcing was not on a level with that committed by tourism agencies in near-neighbour competitor destinations.

In recent years, Tourism Northern Ireland has devoted relatively small funds to the marketing of golf. A significant increase in the funds allocated for golf tourism marketing would be required in the coming years to maximise the benefits of golf tourism and to create impact and awareness in the face of strong competition.

**Northern Ireland Golf Positioning**

The success of Northern Ireland’s champion golfers Rory McIlroy, Graeme McDowell and Darren Clarke prompted the need to look at Northern Ireland’s golf positioning and to consolidate Northern Ireland’s profile in the market place as a golf tourism destination with great golfers and great courses.

The Northern Ireland golf positioning “Northern Ireland Made for Golf” was created for this purpose. It has been used to good effect at the Irish Open at Royal Portrush in 2012, at Carton House and Fota Island in 2013 and 2014 respectively, and at the Northern Ireland Open at Galgorm Castle.

While detailed consumer brand research has not been undertaken as part of this exercise, feedback from the consultation process highlights the benefits and positive traction that the brand has received. It is well received in all quarters, e.g.:

- TV producers and photographers like it as it’s sharp and very clear;
- Spectators liked it and many used the course signage as a backdrop for their personal photos (civic/national pride);
- The branding and the messaging received positive feedback from several of the international players, commenting that it explains what Northern Ireland is all about.

It promotes a clear, straightforward and consistent message which contributes to a strong recognisable identity and promotes a sense of place for golf in Northern Ireland (i.e. links to positive aspects of golf, the natural landscape, the Northern Ireland 19th hole experience, etc.) that can be developed in the future. If combined with other Northern Ireland messaging, there is a risk that the clarity and effectiveness of the message would be diluted.

A single uniform message is used by near-neighbour competitors in their positioning as golf destinations, e.g.:

- Scotland: The Home of Golf
- Ireland: Time To Play
- Wales: Golf As It Should Be

Tourism Ireland has used “Ireland – Time to Play” as an island of Ireland message and “Northern Ireland – Home of Champions” in campaigns promoting golf in Northern Ireland as part of an all-island message.

The recommendation is to continue to use the Northern Ireland Golf positioning “Northern Ireland Made for Golf” at all golf events which will be central to consolidating and further building a strong Northern Ireland golf destination brand.
This should be supported by the development of brand guidelines in a golf toolkit for businesses and other stakeholders to help them align their marketing messages with the Northern Ireland golf brand. This includes having a range of iconic images, ensuring the consistency and effectiveness of marketing and messaging to reflect the best of Northern Ireland’s golf experiences.

**Northern Ireland Golf Communications and Messaging**

The implications for the promotion and messaging for Northern Ireland golf are:

1. Northern Ireland’s ‘stand-out’ – meaning the differentiated value golf product – has to be defined for each market to ensure that Northern Ireland is not under-marketed or undersold. The implication is that the Northern Ireland brand “Northern Ireland Made for Golf” must be flexible enough to be tailored for use in marketing of golf in various markets (e.g. used in closer markets – GB and Republic of Ireland).

2. The positioning of Northern Ireland in markets further afield should be as part of the island of Ireland golf offer (for reasons previously cited). This has implications for the brand architecture to achieve the balance between near and further-off markets.

3. A market-specific brand architecture has to be designed: one which ensures the right presentation and subsequent messaging to the right markets. This should include stronger promotion of golf regions or clusters, some of which will be cross-border.

4. The recommendation is that golf in Northern Ireland should also be promoted through four key regional clusters. The name for each of these clusters must describe the area/segment to which it relates. Regional cluster branding in some markets (near-neighbours) will be more important than the generic Northern Ireland branding for golf. Each regional cluster should have its own positioning, depending on what its golf cluster has to offer. In each case, the regional positioning must link back to the generic Northern Ireland golf positioning. A cluster might be geographic or themed, e.g. links courses. As clusters are developed, it is recommended that golf trails are created to give shape to these areas and help position them in the mind of the consumer. The trails might be a combination of links and parkland and might, where appropriate, include a cross-border offer, e.g. Lough Erne Resort “Amen Corner” (Co Donegal GC and Narin and Portnoo Links). The purpose of the golf trails is to package courses together to help inform consumers and operators as they put together itineraries. In particular, packaging trails to the near-neighbour markets will help to profile and promote the value parkland courses and provide the industry with a new product to take directly to market.

**Northern Ireland Golf Tourism Monitor 2013/14**

Tourism Northern Ireland has been operating the Northern Ireland Golf Tourism Monitor since 2013; the headline results show:

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Economic Impact</td>
<td>£27m</td>
<td>£33.2m</td>
</tr>
<tr>
<td>Visiting Golfers Total</td>
<td>134,268</td>
<td>139,300</td>
</tr>
<tr>
<td>Visiting Golfers from Out of State</td>
<td>20,484</td>
<td>22,293</td>
</tr>
</tbody>
</table>

- The North American market is currently the cornerstone of the out-of-state golf tourism market to Northern Ireland.
- The feedback from North American visitors is very positive and a high proportion wants to return.
- A higher proportion of golfers visit only Northern Ireland as their chosen golf destination.
- Awareness of Northern Ireland’s major champions has a significant impact on European visitors’ decision-making to come to Northern Ireland.
Product and Market Fit: A Case of Market Failure?

The substantive issue in considering the way the Northern Ireland golf product fits with market demand (“what players want”) lies in the dichotomy between parkland and links courses and the appeal each of these has to various markets.

There is good access into Northern Ireland from GB and ROI for golfers by air and sea. However, we catalogue two further factors – seen as constraints - on Northern Ireland’s success as a golf destination for markets further afield:

• Limited direct air access from Europe and North America to Northern Ireland and the perceptions that golfers’ access to the island of Ireland via Dublin is a disadvantage to Northern Ireland’s success;
• The mistaken belief amongst some managers of parkland courses that they have limited appeal to visitor markets.

Northern Ireland’s success and reputation for outstanding links course experiences – coupled with very professional marketing and relationship management with golf tour operators – provide the apex of golf tourism impact.

The North American market particularly loves to capture trophy courses and wants the links experience. Northern Ireland should remain focused on offering this golf product. While the Royal links golf clubs have capacity issues which limit flexibility of the offer at peak times, second on-site courses (e.g. Royal Portrush and Royal County Down) and the balance of other links courses make this a marketing/distribution issue rather than an overall capacity issue.

Other geographical markets also like to experience links courses, but UK and European golfers have easier access (through proximity to other links courses in other destinations) and are content to play parkland courses, provided flexible tee times are available. What’s missing from the Northern Ireland equation of how to stimulate demand is a coherent parkland course offer to these markets.

These factors result in a classic case of market failure: few tour operators and parkland courses are putting their product offer into the marketplace based on the perception that golfers view access to Northern Ireland as a constraint. The reality is that for North American and European markets, the Northern Ireland golf offer is seen as part of the island of Ireland golf proposition and therefore access via Dublin to Northern Ireland is widely acceptable.

The SWOT analysis in Appendix 3 identifies what makes golf in Northern Ireland different/special and what gives Northern Ireland its sustainable, inimitable, competitive advantage.

Why Northern Ireland

With a strong golfing heritage, two of the top-rated courses in the world, major golfing events in forthcoming years, and the triumph of champion golfers, Northern Ireland is well-placed to capture a larger market share of golf visitors.

Effective and consistent marketing of the Northern Ireland golf tourism proposition and added value for the national and international visitor need to be developed and sustained, and the market and customer focus of each segment of the industry further developed.

The following are considered to be the key reasons why golfers should visit and experience Northern Ireland.

• A diverse range of courses and experiences;
• Two golf courses of high quality that regularly feature on reputable world-ranking lists;
• Some of the best hidden gem links golf in the world with a value offer;
• Fully accessible golf courses;
• Excellent value for money at all ends of the market;
• A variety and diversity of golf courses within compact travelling distances;
• A year-round opportunity to play links courses;
• Quality open amateur tournaments;
• A personalised experience that incorporates Northern Irish culture and “craic”, i.e. The 19th Hole Experience;
• The quality and proximity of complementary attractions and visitor experiences.

9. Currency exchange is also not a major constraint to these sophisticated golfers, although £/€/$ fluctuations may be, for more price-sensitive European
Major events are recognised as a key economic development and tourism driver for many destinations.
Golf Tournaments and Events

Major events are recognised as a key economic development and tourism driver for many destinations. The significance of hosting a major professional golf tournament in a destination lies in the opportunities events provide for branding the destination; increased awareness in key markets; an opportunity to engage with key influencers in specific markets; and economic impact benefits.

Destinations are now linking golf tourism strategies with competition golf. Abu Dhabi, for example10, is now a destination on the European Golf Tour, with three championship courses in the Gulf Region’s top four. The result is that they are able to promote tourist packages, and golf tourism is identified as a core pillar in Abu Dhabi’s long-term tourism strategy.

For any country or region hosting a professional tournament that receives mass media coverage, it is an opportunity to profile the destination and country to a wider global audience.

Golf Events in Northern Ireland

Northern Ireland is in a strong position, having the opportunity to host three tournaments over the period of the strategy. Major events are a key tourism strength for Northern Ireland: the promotional and economic benefits from hosting major golf events are demonstrable, despite the costs of attracting and hosting such events. Events provide the opportunity to raise the profile of Northern Ireland as a golf destination and showcase it to a wider global audience.

Through its event fund, Tourism Northern Ireland has developed an existing portfolio of major events. An assessment of the current portfolio is as follows:

**The Northern Ireland Open**

The event is owned by Galgorm Castle and is a key element of Tourism Northern Ireland’s Golf Tourism Strategy to create and develop the Northern Ireland Open.

Now in its fifth year, the first three years were on the PGA EuroProTour and the last two years on the Challenge Tour. The event showcases parkland golf on an annual basis and provides playing opportunities for up-and-coming Irish professionals to develop the next ‘Rory’.

The event is held on the same date and location each year and allows visitors and businesses to plan their visit and business meetings around the event. The key features of the event are:

- The event theme is "world-class golf and Northern Ireland’s world-class food"
- More than 34,00011 visitors attend the event over the week
- The event created in excess of 6,000 bed nights within the region
- The economic impact to the region from the event is approximately £1 million
- A marketing and PR value of over £3.7 million
- More than 29,000 unique visitors to the event website
- The event creates another good news story and continues to showcase Northern Ireland and Ireland in the global shop window.

10. HSBC Golf Futures
11. Source Galgorm Castle
The Irish Open

The Irish Open was hosted in 2012 at Portrush with direct support from Tourism Northern Ireland. The event would not have been held in Northern Ireland without this support. The Northern Ireland Executive highlighted it as an example of a prestigious global event which “showcases Northern Ireland’s iconic landscapes and stand-out features” and “acts as a catalyst for wider industry to develop related product and embrace the opportunities presented”.

The key benefits of the 2012 event to Northern Ireland were:

The 2012 Irish Open at Royal Portrush was the first return of the event to Northern Ireland in 60 years. Over the six days of the event (which included practice and Pro-Am days), there were:

- 132,000 visitors
  - 23% of spectators were from the Irish Open’s host council (i.e. Coleraine Borough Council);
  - 61% of spectators were from the rest of Northern Ireland;
  - 16% of spectators were from outside Northern Ireland.
- 9,123 of the 9,584 out-of-state spectators travelled to Northern Ireland specifically to attend the Irish Open.
- £12 million of economic benefit
- Over 28,000 bednights
- Global media coverage estimated at £107 million
- 10,000 passengers travelled by rail and
- 30,000 used the park-and-ride facilities.

Royal County Down will host the tournament in 2015, with Lough Erne Resort announced as the 2017 venue.

Currently the event has no commercial sector sponsorship and relies on funding support from either Fáilte Ireland or Tourism Northern Ireland. Funding is secured from Tourism Northern Ireland for the 2015 and 2017 events. However Fáilte Ireland has still to confirm its support for 2016.

Comparison can be made with The Scottish Open which has secured commercial sector and Scottish Government support through to 2020.

The Northern Ireland golf industry does recognise the benefit of the event and the need for it to return to Northern Ireland on a regular basis, thus keeping Northern Ireland’s profile as a destination hosting major events.

There are wider benefits than solely golf tourism from Northern Ireland hosting the Irish Open and that consideration should be given to benefits from hosting the Irish Open on a three-year cycle (two years in the Republic, one year in Northern Ireland).
The Open Championship

With Royal Portrush restored on the roster for the Open Championship from 2019, there are now ten courses on the rota.\textsuperscript{13}

In recent times, The Old Course at St Andrews has hosted The Open every five years. The remaining courses host The Open roughly every 10 years, but the gaps between hosting Opens may be longer or shorter than this. The benefits to a destination are significant: table 2 summarises the economic and media benefits from the past five years of Open Championships.

The value of hosting The Open Championship had grown through to 2010, although it has been more variable in more recent years, probably as a result of recession, as well as the characteristics of the various host courses, e.g. St Andrews being the most popular Open Championship venue.

When hosting The Open, Scotland’s key partners\textsuperscript{14} have in place a Memorandum of Understanding. Its purpose is to establish consistent arrangements for joint-working between the partners, towards the preparation and future delivery of The Open Championship in Scotland. The collective work of all parties involved ensures Scotland continues to successfully host The Open Championship on a regular basis, and that the opportunities and impacts associated with the global event are maximised in Scotland.

Hosting The Open Championship will be one of the largest global sporting events that Northern Ireland will have staged. With The Open returning to Northern Ireland after such a long absence and Rory McIlroy playing in his home country, it is fair to assume that the level of interest will be significantly greater than normal, with the potential for significantly higher levels of spectator numbers and media coverage.

As a host destination, Northern Ireland will be offered a presence at preceding Open venues, giving Northern Ireland an opportunity to profile itself, but necessitating resourcing to do this effectively.

\textbf{TABLE 2 THE OPEN CHAMPIONSHIP: ECONOMIC & MEDIA BENEFITS}

<table>
<thead>
<tr>
<th>Venue</th>
<th>Andrews</th>
<th>Royal St George’s</th>
<th>Royal Lytham</th>
<th>Muirfield</th>
<th>Hoylake</th>
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</thead>
<tbody>
<tr>
<td>Year</td>
<td>2010</td>
<td>2011</td>
<td>2012</td>
<td>2013</td>
<td>2014</td>
</tr>
<tr>
<td>No of Spectators</td>
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<td>180k</td>
<td>181k</td>
<td>160k</td>
<td>202k</td>
</tr>
<tr>
<td>Economic Benefit</td>
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<td>£65m</td>
<td>£88m</td>
<td>£76m</td>
</tr>
<tr>
<td>Media Equiv</td>
<td>£47.2m</td>
<td>£52.6</td>
<td>£37m</td>
<td>£45m</td>
<td>£52.2</td>
</tr>
</tbody>
</table>

\textsuperscript{13} 5 Scotland; 4 England; 1 Northern Ireland

\textsuperscript{14} R&A Championships Limited, the Local Authorities in Fife, Angus, East Lothian and South Ayrshire, Event Scotland and VisitScotland
Events to consider bidding for

Looking beyond 2020, consideration needs to be given to the benefits and opportunities presented by hosting other major golf events to build on the momentum of the current events portfolio and to further enhance Northern Ireland’s international profile. A key ambition of the Northern Ireland Events Strategic Vision is to bid for/host at least one major global event within Northern Ireland each year.

Northern Ireland has a robust golf events calendar through to 2020 and does not need to host any additional major events prior to 2020, other than those already committed. The major global events Northern Ireland might consider bidding for beyond 2020 will further enhance Northern Ireland’s profile on a global stage and help promote the golf tourism product.

There are three events to consider:

• The Ryder Cup: the first bidding opportunity is 2026
• The Solheim Cup: the first bidding opportunity is 2019
• Ricoh Women’s British Open: the first bidding opportunity is 2017 with further opportunities beyond 2020

Three criteria are key to deciding which events to bid for:

1. Prior to 2020, what else is happening in Northern Ireland in golf events? Currently Northern Ireland does not want or need more than one major tour event each year;
2. The economic value of the event: the economic value of the Ricoh Women’s Open is substantially less than The Irish Open, or The Ryder Cup; and
3. The costs of bidding and succeeding in hosting a major tour event

Expressing interest in bidding to host golf events is a powerful message, endorsing Northern Ireland’s commitment to hosting global events, their importance in profiling the destination and the importance of golf tourism to Northern Ireland’s economy.

The headline benefits for each of the events is summarised in Appendix 4.

Prestigious Amateur Tournaments

Consideration also needs to be given to the opportunities for hosting high-profile amateur golf tournaments. These events are managed by the R&A (Male) and the LGU (Female). Examples of these events include:

• The Walker Cup
• The Curtis Cup
• The Amateur Championship (held at Royal Portrush and Portstewart in 2014)
• The Boys Amateur Championship

As a showcase of the best amateurs and emerging future professional champions, these tournaments are an excellent medium for raising the profile and awareness of golf participation and development. However, these events tend to generate limited press and media interest, have limited spectator interest and some TV coverage, but not in all key markets.

These events are a good way of “supporting the game” and will get coverage amongst the UK’s specialist golf press. However, with finite financial resources, these should not be considered as priority events for golf tourism.
Open Amateur Events and Golf Weeks

Local club open competitions, regional events and golf weeks are opportunities to encourage out-of-state (as well as domestic) golfers to Northern Ireland by promoting the value offer of these events.

Northern Ireland has a good portfolio of amateur open events, these include:

- Causeway Coast Golf
- Down Spring and Summer Links
- Lough Erne & Links Challenge
- The Great North Links Challenge

Many of these events require marketing support to promote them to a wider audience. Tourism Northern Ireland has not previously provided support to these types of events. The recommendation is that support and encouragement are given to these open competitions and tournaments to raise awareness and build off-season opportunities.

Therefore a key action for the strategy should be supporting golf event organisers to market these golf events to enhance Northern Ireland’s reputation as a value golf destination and increase the numbers participating.

Tourism Northern Ireland should also lead on identifying and targeting national events where qualifying rounds are played and a final is the stage in a chosen country. Examples of this type of event include:

- The International Pairs Competition
- U.S. Kids Golf European Championship
- Old Mutual Wealth Golf Challenge
Market Opportunities for Northern Ireland

The task of the tourism and golf authorities is to sustain Northern Ireland’s market share and develop the destination further to encourage more, higher-spending golf visitors. Key to this aim is the current success of the destination, the reputation of its champion players and the product/market fit, making sure Northern Ireland’s golf product meets market opportunities.

This section looks at the geographic and golf market segments that Northern Ireland should be targeting in the next five years and how the product in Northern Ireland fits with market demands. Further below, we look at the marketing implications of accepting the recommendations about target markets.
Key Geographic Markets

Northern Ireland’s success to date is in attracting golfers from North America, GB and Ireland, with smaller numbers coming from various European markets.

Because of the numbers of players in these areas, Northern Ireland’s reputation and visibility, and the product/market fit, the recommendation is that the following focus remains the geographical priority:

- North America (USA & Canada)
- GB
- Ireland
- Europe

Germany and Sweden are the two biggest mainland European golfing markets, although opportunities exist to attract golfers from other European countries. The recommendation is segmenting the European markets as follows:

- Primary – Scandinavia / Germany
- Secondary – Netherlands, France, Belgium, Switzerland, Austria, Spain and Italy.

Tourism Ireland is responsible for marketing to all markets outside Ireland. While there is potential in the emerging golfing markets of China and India, considerable product development is required on the ground to meet the demands of these markets before any major marketing investment is undertaken.

Marketing to emerging markets would be Tourism Ireland supporting golf tour operators with a presence in these markets and individual courses/ clubs that prioritise and are prepared to invest in these emerging markets.

The recommendation is to continue with a budget allocation to encourage golf travel writers and tour operators from emerging destinations respectively to profile Northern Ireland or develop commercial platforms, allowing organic growth in these markets\textsuperscript{15} with absolute minimum spend.

Key Segments of Travelling Golfers for Northern Ireland

While there is overlap between market segments, it is important to understand the characteristics of golfers and their motivations to travel. The segments of most importance to Northern Ireland are considered to be the following:

1. Trophy Hunters
2. Four-Balls
3. Couples Golf
4. Value Golf Seekers
5. Society Golf
6. Corporate Golf

Broadly speaking, golfers fit within an older demographic (45+) and will travel in couples or groups of friends. Word-of-mouth plays an important role amongst this demographic. Specific demographics of golfers from priority markets have been considered, as well as the need for Northern Ireland to address emerging trends and opportunities from golf markets, e.g. the high percentage of female golfers in Europe, more golfing couples travelling, an increase/return of smaller corporate golf groups.

\textsuperscript{15} IAGTO identifies that 67% of golf destination choice is peer-led and influenced by PR
Table 3 below highlights the relative benefits to Northern Ireland of each geographic golf travel segment and the motivators for decision-making about travelling to play golf.

**TABLE 3 - CONSUMER SEGMENTS**

<table>
<thead>
<tr>
<th>Consumer Segments</th>
<th>Priority Markets</th>
<th>Motivators / Needs</th>
<th>Northern Ireland Offer</th>
</tr>
</thead>
</table>
| **Trophy Hunters** | USA/ Canada and GB (limited) | • Trophy course history and heritage  
• ‘Ticking the box’ on the list of the world’s most famous courses  
• Not price-sensitive  
• Direct flights  
• Four and five-star accommodation  
• Travel in groups  
• Book through a GTO and have organised itinerary  
• Plan long time in advance (from North America)  
• Like having a caddy to enhance experience  
• Short stay (UK)  
• Predominately male  
• Trip made with close friends | • Market trophy courses to North American market  
• Target high-value customers  
• Role of tour operators crucial  
• Package independently of Ireland for two/three-day stays  
• Introduce customers to other “best of Northern Ireland” courses for three to five-day stays  
• Package with island of Ireland golf offer for longer stays (more than five days)  
• Package Northern Ireland’s quality accommodation, food and ‘craic’ for these markets |
| **Four-Balls** | Germany/ Scandinavia | • Like to discover new experiences  
• More likely to book independently and in advance  
• Pre-booked tee times  
• Happy to combine links and parkland courses  
• Food and drink experience important  
• Interest in other Northern Ireland experience (culture, landscapes, etc.)  
• Tend to be longer stays  
• Look for packages and promotions  
• Self-drive options | • Opportunity to package parkland courses to this market  
• Combination of links (not necessarily trophy courses) and parkland experiences  
• Put more courses online for tee-time booking  
• Access these markets through Dublin (except where direct flights to Northern Ireland)  
• Emphasise short driving times to Northern Ireland courses from Dublin  
• Package Northern Ireland courses from Dublin  
• Package accommodation, food and ‘craic’ experiences  
• Tour operators in these markets are important |
<table>
<thead>
<tr>
<th>Consumer Segments</th>
<th>Priority Markets</th>
<th>Motivators / Needs</th>
<th>Northern Ireland Offer</th>
</tr>
</thead>
</table>
| **Couples Golf**      | GB/ ROI/ Germany/ Scandinavia | • Travel as couples or in small groups of couples  
• Open to both short breaks and longer stays  
• Happy to combine links and parkland courses  
• Under-exploited / opportunity for growth  
• Genuine Northern Ireland experience: hospitality and culture important  
• Interesting, boutique and historical accommodation wanted  
• High levels of customer service essential  
• Tailored rather than simple packages requiring tour operator support  
• Three to five-star accommodation plus boutique and guest houses  
• Memorable experiences required: dining and other  
• Self-drive for couples and managed tours for groups | • Encourage more parkland courses to access this market  
• Emphasise quality of parkland experience  
• Differentiate Northern Ireland brand (from all-Ireland)  
• Package parkland and links offer  
• Encourage tour operators to package quality of play, choice of accommodation, food and travel package  
• Where access through Dublin, emphasise short driving times |
| **Value Golf Seekers** | GB/ ROI         | • Travel in groups  
• Pre-booked tee times required  
• Happy to combine links and parkland courses  
• Food and drink important  
• Organised transfer  
• Short breaks  
• Reciprocal arrangements with clubs  
• Late bookings common | • Direct and easy air access to Northern Ireland  
• Ferry access  
• Opportunity to package parkland courses to this market  
• Combination of links (not necessarily trophy courses) and parkland experiences  
• Put more courses online for tee-time booking  
• Emphasise short driving times to Northern Ireland courses from Republic  
• Package accommodation, food and ‘craic’ experiences  
• Quality of experience is important  
• ‘New’ / ‘undiscovered’ courses to try  
• Value for money |
| **Society Golf**       | GB/ ROI         | • Travel in groups  
• Pre-booked tee times required  
• Happy to combine links and parkland courses  
• Book well in advance  
• Price sensitive  
• Three-star plus accommodation | • Parkland courses  
• Value for money  
• Quality of experience  
• Friendly welcome  
• Flexible tee times |
| **Corporate Golf**     | GB/ ROI         | • Decision made by senior management  
• Mostly male  
• Price not an issue  
• Direct access  
• Corporate meetings potential  
• Resort golf packages with everything on site  
• City golf options with minimal transportation | • Put golf packages in place for meetings and conferences market  
• Targeted promotions to decision makers (of conferences)  
• Emphasise accessibility/proximity to conference venue  
• Develop add-on packages  
• Develop spouse/partner packages  
• Target professional conference organisers |
How should Northern Ireland Golf be promoted for growth?

Ensuring that Northern Ireland offers the right products and experiences to golfers drives the marketing of Northern Ireland for golf.

This requires an Integrated Golf Tourism Strategy, the blueprint for which comprises:

1. A three-year marketing and communications plan that is conveyed to golf clubs and trade to ensure their involvement and consistent delivery in the identified markets.

2. A requirement for visible results: the objective must be increased sales, as well as increased awareness. Thus direct sales into key markets with the trade participating.

3. Tourism Northern Ireland facilitation and collaboration role (bring trade in to events/shows, etc.) and work with Tourism Ireland and golf tour operators to increase awareness of the Northern Ireland golf product.

4. A consumer-facing golf destination website which inspires, informs and directs the consumer. Review the options on how to maximise benefits from the three golf websites promoting Ireland16.

5. Content development that informs website content and media kits and is a precursor to all press releases.

6. Communications (public relations) and press trips to generate editorial and social media coverage (including support to emerging markets, as described above).

7. Website trade marketing to support the Northern Ireland golf tourism industry and to international golf tour operators, enhancing their own sales and awareness activities and facilitating B2B business.

8. The private sector tracking the growth in sales to their clubs, and thus the importance of continuing the Golf Monitor.

9. Product development and product packaging are the domain of the private sector and result in the overall product positioning of Northern Ireland, which drives all aspects of trade marketing and promotions and has a direct bearing on resultant sales and sustainable growth. Tourism Northern Ireland’s support should be to help the golf sector create and promote memorable and unique Northern Ireland Golfing experiences, bringing in restaurants, bars, accommodation, transport, entertainment, etc.

10. Cooperative campaigns to be segment specific (e.g. attracting ‘German golfing couples’ would gain more traction than a campaign just to get more Germans to come to Ireland).

11. To build the role and function of the Quality Assurance scheme for golf clubs — using this as a threshold to identify those clubs who want to contribute to golf tourism - to grow their visitation and revenue. The QA system should become more dynamic, identify areas for improvement within clubs and contribute to clubs’, and Northern Ireland’s, marketing messages.

12. To promote golf industry leadership in Northern Ireland, with the members of the Golf Advisory Group leading the recruitment of ambassadors and advocates for golf tourism and golf investment; developing clusters for self-help; and contributing to the marketing, promotion and messaging of Northern Ireland for golf tourism.

The All-Ireland Conundrum: “Golfers don’t see political boundaries”

Golf travel is, in some ways, unique, in that the avid golfer is drawn by the appeal of particular golf courses and golf experiences and is oblivious to the obstacles that may deter the generic holidaymaker who just wants a break from the norm.

The island of Ireland comprises different golf destinations, golf clusters and golf routes. In both the North West and the East of the Republic those marketing these destinations are already developing, marketing, promoting and selling cross-border golf programmes.

Tourism Ireland’s role is promoting the island of Ireland golf offer. In partnership with Tourism Northern Ireland, a key priority will be to develop a market-specific brand architecture to ensure the right presentation and subsequent messaging to the right markets, i.e.:

- For North American and European markets, Northern Ireland can be marketed more effectively, and Northern Ireland will benefit from being part of an island of Ireland golf offer;
- For GB and ROI markets, the Northern Ireland golf offer should be promoted as distinctly Northern Ireland, with its own brand and value attributes (food, hospitality, quality of courses, etc.);
- Both direct access to Northern Ireland (where it exists) and access via Dublin should be seen as market opportunities;
- Golf tour operators should continue to be encouraged to develop more itineraries that encompass:
  » More Northern Ireland courses accessed via Dublin
  » More parkland courses
- Better market intelligence needs to be presented to parkland course managers to demonstrate the demand from certain markets and encourage them to participate in golf tourism;
- Tourism Northern Ireland should support development of regional local clusters, each with its own positioning, depending on what its golf cluster has to offer. In each case, the regional positioning must link back to the Northern Ireland brand.
Delivering the Strategy

Strategic Themes

The vision and aims of the strategy are as follows:

**Vision**

To grow the value of golf tourism from the current estimate of £33m p.a. to £50m p.a. by 2020 and, in doing so, to remind golfers worldwide that “Northern Ireland is where golf champions are born and play”.

**Aims**

1. Grow the value of golf visitation to Northern Ireland to £50m p.a. by 2020.
2. Develop the capability and capacity of clubs and courses to host visiting golfers.
3. Enhance the reputation and visibility of Northern Ireland for golf tourism in designated markets.
4. Build Northern Ireland’s capacity to host golf events.

There are five interrelated strategic themes under which the strategy should be delivered. They are interrelated because development of one strand alone only partially addresses the opportunity of growing golf tourism in Northern Ireland and because progress in one theme impacts the likelihood of success in the other themes.

The five strategic themes to drive future golf tourism in Northern Ireland are:

1. Developing stronger clubs - strengthening the capacity of the clubs to be able to accommodate visiting golfers
2. Clustering and collaboration across the golf industry to help strengthen individual clubs and generate collaborative marketing
3. Stimulating demand through a medium- to long-term marketing and promotions campaign
4. Optimising Northern Ireland’s position through golf events
5. Leadership, advocacy and building on the role of the golfing champions
The themes are detailed below with the linkages:

<table>
<thead>
<tr>
<th>Delivering the Northern Ireland Golf Tourism Strategy</th>
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</thead>
<tbody>
<tr>
<td><strong>Strategic Themes</strong></td>
</tr>
</tbody>
</table>
| 1. **Develop Stronger Clubs** | • Encouraging more clubs to participate in golf tourism increases Northern Ireland capacity  
• Opportunity to strengthen the revenues (and viability) of clubs |
| Supporting golf clubs through Quality Assurance, business support, management and marketing programmes to raise their capability and capacity to accommodate visiting golfers and provide them with positive experiences |
| 2. **Clustering and Collaboration** | • Peer engagement to encourage commitment to quality standards (golf visitor welcome, etc.)  
• Foundation for golf club, accommodation provider and tour operator relationships and joint marketing  
• Develop itineraries for visiting golfers and put these into marketplace |
| Develop four cluster groups of golf clubs in key locations to encourage them to collaborate, exchange experience and market together collaboratively to target markets. |
| 3. **Stimulating Demand** | • Designing and planning the marketing and messaging of Northern Ireland in different markets  
• Defined marketing activity to integrate participating golf clubs  
• Stimulate relationships and demand with golf tour operators currently not programming Northern Ireland in their offer |
| Refine the branding and messaging of Northern Ireland golf for different markets and resource initial three-year marketing and promotions campaign to stimulate demand. Tailor the messaging to the needs of specific segments/countries |
| 4. **Optimising Golfing Events** | • Reinforcing the reputation and visibility of Northern Ireland as a golf destination  
• Economic value of events and building the capacity to showcase Northern Ireland  
• Stimulate demand from visiting golfers for amateur events throughout the year |
| Maximise the opportunities from professional and amateur golf events leading up to 2020 to position Northern Ireland as a venue for major golf tour events post-2020 |
| 5. **Leadership, Advocacy and Champions** | • Encourage more clubs to participate in the golf tourism market  
• Demonstrate and advocate resource requirements for effective delivery of the strategy  
• Build on the role of the golf champions to maintain Northern Ireland’s competitive advantage in golf tourism  
• Contribute to the activity programmes of clusters |
| Through the Golf Advisory Group, champion the strategy and inspire all stakeholders to deliver strong, effective leadership and collaboration |
The actions identified below are drawn together from the analysis and consultations with the golf and tourism industry, operators, agencies and local authorities. The Action Plan should be regarded as a framework document that will be refined and developed over its lifetime to 2020.

**Strategic Theme 1: Developing Stronger Clubs**

Supporting golf clubs through Quality Assurance with related business support, management and marketing programmes to raise the capability and contribution of clubs to the golfers’ visitor experience to Northern Ireland.

**Actions**

1. Review the Quality Assurance Scheme to support clubs to improve the quality of the visitor experience; encourage more clubs to join the scheme; and participate in the golf tourism market to increase visitor numbers, spend and repeat visits.

2. Encourage Quality Assured clubs to undertake business development support from CGI to go through business planning process.

3. Develop a golf tourism toolkit to signpost clubs and businesses to the product development and marketing opportunities with Tourism Northern Ireland and Tourism Ireland in key markets. Tourism Northern Ireland to develop and deliver a golf visitor marketing initiative for clubs to improve their visitor marketing.

4. Facilitate clubs to contribute to the Golf Monitor and provide customer satisfaction measurement training.

**Strategic Theme 2: Clustering and Collaboration**

Develop four cluster-centred groups in key locations to represent the interests of all the stakeholders in golf tourism in each region and develop and promote quality regional golf experiences in key markets.

**Actions**

5. Facilitate development of four regional clusters by December 2016 and assist with developing cluster regional promotional and activity plans.

6. Encourage private sector to develop and package golf experiences through a series of dedicated workshops.

7. Motivate clubs and tourism industry to promote offers and promotions throughout the season on Tourism Ireland / Tourism Northern Ireland websites and online golf tour operators. Tourism Northern Ireland to facilitate workshops on benefits of working with OTAs. 

17. Online Travel Agent
### Strategic Theme 3: Stimulating Demand

Stimulate demand from golfers in the key markets by developing a compelling marketing activity programme tailored to needs of specific segments / countries to create emotional connection with visitors and differentiate Northern Ireland within the all-Ireland golf brand.

#### Actions

8. Review and agree the brand / messaging of Northern Ireland golf to ensure the right presentation and messaging relevant to close-to and far-off markets and market segments. Communicate to industry and encourage their use in all their marketing activity.

9. In collaboration with Tourism Ireland, implement the three-year marketing activity plan and communicate opportunities to the industry to contribute and participate.

10. In parallel with the marketing activity plan, develop and implement a three-year media and communications plan (digital, social and traditional media), building on established relationships and developing new ones with GTOs and golf media through a series of familiarisation visits and product / golf days in key target markets.

11. Review consumer-facing golf destination websites on how to maximise benefits from the three golf websites promoting Ireland, so that they profile the Northern Ireland golf stand-out and make it easy for consumers to book.

12. Maximise opportunities of membership with IAGTO supporting UK, ROI and overseas tour operators, in conjunction with Tourism Ireland, to develop golf tour programmes to Northern Ireland.

### Strategic Theme 4

Maximise the opportunities from professional and amateur golf events leading up to 2020 and position Northern Ireland as a venue for major golf tour events post 2020.

#### Actions

13. Develop a marketing and business development initiative to support the existing regional and amateur golf events and advise them how to improve their appeal and increase visitor numbers.

14. Work with all partners to deliver support to The Open Championship to maximise the benefits from hosting the event.

15. Determine which events to consider bidding for post-2020, dependent on anticipated economic value and budget/cost, as well as likelihood of attracting commercial sponsors.

16. Working with event promoters to ensure procurement opportunities notified to Northern Ireland companies to optimise commercial benefits for Northern Ireland businesses.

### Strategic Theme 5: Leadership, Advocacy and Champions

Through the Golf Advisory Group, champion the strategy and inspire all stakeholders to deliver strong, effective leadership at all levels across the industry and encourage collaboration in the development of offers and the delivery of the highest levels of service excellence.

#### Actions

17. Develop robust mechanisms to gather relevant data to support decision-making and to evidence change; and to ensure clubs and businesses recognise the role they play in both gathering and using effectively customer information to develop their product and the experiences they offer.

18. Implement an industry engagement and communication platform providing industry with market information, intelligence, best practice, etc.

19. Advocate and support the development of at least one golf resort, preferably links, in the next ten years.

20. Advocate and support issues that impact on Northern Ireland’s golf tourism performance, e.g. air access and VAT.
Measuring Success

Tourism Northern Ireland introduced a National Golf Tourism Monitor in 2013. The monitor comprises interviews with visiting golfers, a benchmarking survey and the submission of rounds-played information by participating clubs. The purpose of the monitor is:

- to gather data on the volume and value of visiting golfer rounds played on golf courses in Northern Ireland
- to understand better who the Northern Ireland golf tourist is
- to establish base data for on-going measurement in the years ahead

The key findings of the survey are summarised above and provide a baseline for measuring the success of golf tourism in Northern Ireland.

Information-gathering is crucial to understanding what golfers from different markets want when golfing in Northern Ireland. Gathering quality visitor data, sharing market intelligence and best practice are all vital elements in developing the Northern Ireland golf tourism experience.

The response rate from the clubs participating in the monitor is approximately 55% of the Quality Assured clubs and 21% of all clubs in Northern Ireland.

Making the Golf Monitor data more robust is crucial and will increase confidence in the results of the monitor. Therefore a key action must be for more clubs to contribute data to the monitor.

Recommendations for measuring the success of golf tourism are:

- Continued support of the Golf Tourism Monitor for the duration of the strategy
- Encourage increased participation by golf clubs through enhanced Quality Assurance activity, e.g. understanding your customer workshops
- Increase the number of Golf Monitor consumer surveys
- More detailed Golf Monitor consumer questions on visitor spend
- Disseminate results to industry
The marketing and development of golf tourism in Northern Ireland is currently funded through two sources:

1. Tourism Northern Ireland golf marketing, where the funds allocated to golf marketing in recent years have been relatively low.
2. Tourism Ireland through the DETI funding to deliver island of Ireland golf promotional campaigns.

For golf tourism to make a significant contribution to the Northern Ireland tourism economy, additional funding will be needed to achieve impact and awareness in the face of increasing world competition.

The ambition is for Northern Ireland to increase market share and visitor numbers, and the view is that more funding will be needed to:

- Create impact and awareness in the face of strong competition
- Handle the increased workload that this development process will generate and achieve good growth

Implementation, and thus the successful delivery of the strategy, is set against the context of accessing additional funding, and defining and agreeing actions and commitments from agencies and authorities to the financial resources required to deliver the strategy.
Organisations and their Roles

The delivery of the Golf Tourism Strategy requires the coordination of the skills and resources of a number of agencies and organisations. Highlighted below is the contribution of each to the success of the project.

<table>
<thead>
<tr>
<th>Organisation</th>
<th>Roles and functions</th>
</tr>
</thead>
</table>
| **Golf Advisory Group (GAG)** | • ‘Ownership’ of the strategy  
• Advocacy of the strategy and its components to other agencies and the golf sector  
• Generate golf industry support where required  
• Peer-to-peer encouragement and motivation of clubs  
• Leadership of the clusters  
• Ambassadors in promoting Northern Ireland golf destination |
| **Tourism Northern Ireland** | • Executive delivery of the strategy  
• Lead on major golf events  
• Support cluster development  
• Further development of QA scheme to encourage clubs to participate in golf tourism  
• Business, management and marketing programmes to encourage enhanced performance by clubs  
• Lead on agreeing brand architecture and marketing campaign  
• Sustain Golf Monitor research and ensure market research and analysis to provide additional data on motivations for golfers |
| **Confederation of Golf in Ireland (CGI)** | • Lead golf governing bodies in their engagement in golf tourism  
• Specific role in delivering management and business development programmes within clubs, especially where linked to golf performance and participation  
• Complement golf tourism elements of club development  
• Develop the sport – participation (Get into Golf), women into golf, business services and governance |
| **International Association of Golf Tour Operators (IAGTO)** | • Communicate market views on opportunities and constraints in golf tourism  
• Liaise with golf tour operators and media to encourage development of itineraries and product for the market |
| **Irish Golf Tour Operators Association (IGTOA)** | • Facilitate and communicate market views on opportunities and constraints in golf tourism  
• Facilitate communication between IGTOA golf tour operators and suppliers  
• Liaise and support the Irish golf industry in promoting Ireland as a leading international golf destination |
| **The Royal County Down & The Royal Portrush Golf Clubs** | • Mentoring and support to golf clubs  
• Participation in QA scheme  
• Participation in Northern Ireland Golf Tourism Monitor |
| **Golf Clubs** | • Participation in QA scheme  
• Receptive to business, management and marketing development programmes to support golf tourism  
• Engagement in cluster groups  
• Peer-to-peer support and encouragement  
• Participation in Northern Ireland Golf Tourism Monitor |
| **SportNI** | • Lead on participation and performance in golf  
• Work with CGI on golf development within clubs |
| **Invest Northern Ireland** | • Support cluster development  
• Support golf resort development proposals |
### Golf Tourism Strategy – Contribution of each Organisation/Agency

<table>
<thead>
<tr>
<th>Organisation</th>
<th>Roles and functions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism Ireland</td>
<td>• Marketing outside of the island of Ireland to target markets&lt;br&gt;• Collaborate with golf tour operators and media</td>
</tr>
<tr>
<td>Local Authorities&lt;sup&gt;18&lt;/sup&gt;</td>
<td>• Support local clusters&lt;br&gt;• Support collaborative marketing&lt;br&gt;• Support regional amateur golf tournaments and events</td>
</tr>
<tr>
<td>Destination Partnerships</td>
<td>• Support local clusters&lt;br&gt;• Support collaborative marketing&lt;br&gt;• Support regional amateur golf tournaments and events</td>
</tr>
</tbody>
</table>

### Risk Analysis

A risk analysis has been conducted to identify what would happen if the Golf Tourism Strategy were not adhered to, implemented or resourced.

The risks are:
- Risk of doing nothing
- Risk of Tourism Northern Ireland and its stakeholders not accepting the strategy
- Risk of wider golf sector not accepting the strategy
- Limitations on resource allocation to deliver strategy

The following risks, and how to address them, have been identified which may impact the targets and achievements.

<table>
<thead>
<tr>
<th>Risk Analysis</th>
<th>Actions to Address Risks</th>
</tr>
</thead>
</table>
| Risk of doing nothing in golf tourism:  
• Failure to capitalise on reputation and visibility of Northern Ireland for golf, e.g. through player champions  
• Failure to grow value of golf tourism  
• Failure to generate further benefits from committed golf events | • Revise strategy to meet concerns/issues  
• Generate high-level debate with golf sector and Northern Ireland Executive about moving forward  
• Enlist stakeholders’ commitment and support to identify way forward |
| Risk of Tourism Northern Ireland and its stakeholders not accepting the strategy:  
• Other public funding bodies uneasy about funding projects/programmes | • Review and promote the economic development rationale for golf tourism  
• Evaluate specific/limited roles of each stakeholder in delivery of the strategy |
| Risk of wider golf sector not accepting the strategy  
• Limitations on the number of clubs participating in golf tourism  
• Structural weaknesses of some clubs not addressed | • Identify potential leaders and influencers to talk to peers in the sector  
• Identify benefits and funding opportunities to encourage engagement (e.g. enhanced revenue for clubs)  
• Accept that only premier and willing clubs (e.g. that have gone through QA system) are engaged and involved |
| Limitations on resource allocation to deliver strategy  
• Risks to delivery of the strategy in its entirety  
• Risks to delivery of specific components (e.g. marketing campaign) | • Prioritisation of strategy components for resourcing/implementation  
• Negotiate with other stakeholders for funding commitments  
• Alternative management and delivery structures may need to be designed and agreed |

<sup>18</sup> Existing and new councils, from April 2015
Appendices

### Appendix 1 Industry Consultations

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<thead>
<tr>
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<tbody>
<tr>
<td>Aims and Introductions</td>
<td>Stewart Walker, BTS</td>
<td>Aine Kearney, Tourism Northern Ireland</td>
<td>Karen Hope, Tourism Northern Ireland</td>
</tr>
<tr>
<td>Northern Ireland Golf Tourism Strategy</td>
<td>Aine Kearney, Tourism Northern Ireland</td>
<td>Aine Kearney, Tourism Northern Ireland</td>
<td>Kevan Whitson, Head Professional, Royal County Down</td>
</tr>
<tr>
<td>Golf Tourism: An Industry Perspective</td>
<td>Gary Henry, Galgorm Castle</td>
<td>Lynn McCool, Lough Erne Resort</td>
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<tr>
<td>Confederation of Golf in Ireland</td>
<td>Rory Leonard, CGI</td>
<td></td>
<td>Rory Leonard, CGI</td>
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<td>Workshop Facilitators</td>
<td>Stewart Walker and Ivan Broussine, BTS</td>
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### Workshop Delegates

<table>
<thead>
<tr>
<th>First Name</th>
<th>Surname</th>
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<tbody>
<tr>
<td>Patrick</td>
<td>Aiken</td>
<td>The Golf PA</td>
</tr>
<tr>
<td>Emma-Jayne</td>
<td>Anderson</td>
<td>Nutt Travel</td>
</tr>
<tr>
<td>Kenneth</td>
<td>Brogan</td>
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<tr>
<td>Kim</td>
<td>Brown</td>
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</tr>
<tr>
<td>Caroline</td>
<td>Carey</td>
<td>Moyle District Council</td>
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<tr>
<td>Tom</td>
<td>Cotter</td>
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<td>Courtney</td>
<td>Lynchpin Tours</td>
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<tr>
<td>Katie</td>
<td>Dobson</td>
<td>University of Ulster</td>
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<td>Ann</td>
<td>Donaghy</td>
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<td>Fenton Martin</td>
<td>Fenton PR</td>
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<td>Halley</td>
<td>Diageo</td>
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<td>Hamilton</td>
<td>Mckeever Group of Hotels</td>
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<td>Henry</td>
<td>Galgorm Castle</td>
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<td>Houston</td>
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<td>Kelly</td>
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<td>Inn on the Coast</td>
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<td>Barbara</td>
<td>Kirkpatrick</td>
<td>Glen Lodge B&amp;B</td>
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<tr>
<td>Rory</td>
<td>Leonard</td>
<td>Confederation Golf Ireland</td>
</tr>
<tr>
<td>Moira</td>
<td>Mann</td>
<td>Coleraine Borough Council</td>
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<td>Kerrie</td>
<td>McGonigle</td>
<td>Moyle District Council</td>
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<tr>
<td>Geraldine</td>
<td>Mclaughkin</td>
<td>National Trust</td>
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<tr>
<td>Diane</td>
<td>Megahey</td>
<td>Tara Lodge</td>
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<tr>
<td>Audrey</td>
<td>Millar</td>
<td>Giant Causeway Cottages</td>
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<tr>
<td>Martin</td>
<td>Mulholand</td>
<td>Cross Keys Inn</td>
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<tr>
<td>Nicola</td>
<td>Neill</td>
<td>Blackrock House B&amp;B</td>
</tr>
<tr>
<td>Thomas</td>
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**Lough Erne Resort, 2nd October 2014**

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**Rockmount Golf Club, 23rd October 2014**

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<td>Judy Braniff</td>
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<td>Patrick Dean</td>
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<td>Wilma Erskine</td>
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<td>Jennifer Hempton</td>
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**Consultations**

| Belfast City Council | Brian Johnston |
| Bushmills Dunes | Niall McLean |
| Causeway Coast & Glens Tourism Partnership | Don Wilmont |
| Coleraine Borough Council | Moira Mann |
| Coleraine Borough Council | Richard Baker |
| Confederation of Golf in Ireland | John Roche |
| Destination Mournes | Mark Mohan |
| Fáilte Ireland | Tony Lenehan |
| Fermanagh Lakes | Tanya Cathcart |
| Galgorm Castle | Gary Henry |
| Golf Club Managers’ Association Northern Ireland Region | Gary Steele |
| Golf North and North West Ireland | John McLaughlin |
| IGTOA | Stacey Williams |
| IGTOA | Dennis Kane |
| INI | Liam McKeeating |
| Lough Erne Resort | Lynn McCool |
| North Down District Council | Alex Irvine |
| Roe Park Resort | Terry Kelly |
| The Royal Belfast Golf Club | Susanna Morrison |
| The Royal County Down Golf Club | David Wilson |
| The Royal Portrush Golf Club | Wilma Erskine |
| Sport Northern Ireland | Antoinette McKeown, |
| The Cotter Collection | Tom Cotter |
| Tourism Ireland GB* | Judith Cassidy |
| Tourism Ireland Germany* | Christian Ruebel |
| Tourism Ireland Scandinavia* | Maarit Karkkainen |
| Tourism Ireland USA | Alison Metcalfe |
| Visit Belfast | Gerry Lennon |

*Video conferencing
Appendix 2 Characteristics of Key Segments of Travelling Golfers for Island of Ireland

There is, of course, overlap between market segments, but it is definitely important to categorise golf travellers by their motivation. We would consider the segments of most importance to Northern Ireland to be the following:

**Trophy Hunters**

For avid golfers (usually male) who want to play the best, most renowned and sometimes most exclusive golf courses. 90% of the potential North American market views Ireland in this light, with the vast majority looking at links courses.

For this segment, Ireland will be considered a ‘bucket list’ destination. The challenge with bucket list destinations is that, in the mind of the golf traveller, their significance can delay the action to actually book it. A bucket list destination trip is rarely a last-minute decision.

On the upside, this segment would have the motivation to return more than once, either to play other equally renowned courses or to re-play those they have visited before. Northern Ireland can benefit significantly here by encouraging avid golfers perhaps familiar with SW Ireland to return and experience the NW and North.

Of course, there are trophy hunters of other nationalities: those from Europe would embrace parkland courses that are equally well-known for the events they have staged.

These are generally male-dominated, high-spending individuals and small groups. Trophy hunters will pay over the odds to gain access to prestigious or exclusive golf clubs and will also be attracted to play courses known to have spectacular holes and vistas.

Trophy hunters typically like to enjoy the trappings associated with wealthy golfers, including fine wines, malt whiskies and luxury accommodation.

They are prepared to travel between courses and change their accommodation.

**Value Golf Seekers**

Usually relatively small groups of friends travelling together, primarily to play golf. The group size is usually six to twelve, aged 25 to 55 and predominantly male. They will play golf daily, play different courses and enjoy restaurants, bars and, to some degree, nightlife.

Value golf seekers divide into two sectors, not by motivation but by duration of stay. Short-stay visits tend to be for three nights, incorporating two or three rounds of golf, with weekends preferred. Longer stays or ‘golf feasts’ are five to seven nights, with a minimum of four or five rounds of golf played at a location with a cluster of courses, or with the possibility of a two-centre stay if staying for seven nights.

The preference is for facilities close to the accommodation, and during longer trips (golf feasts) the holiday may incorporate limited non-golf activities.

Value golf seekers are on the lookout for dates, locations and flights which offer the best combined value for money, including shoulder season travel.

The markets generating value golf seekers are going to be almost entirely UK (primary market) and short-haul (European market).

**Four-Balls**

This term defines four friends (or two couples) travelling together with the specific purpose of playing golf together on a daily basis, but predominantly joining other golf holidaymakers or local golfers in organised golf days. These are generally golfers who play together regularly at their own golf club as a four-ball and therefore will be keen to travel together.

Their golf holidays are most likely to be shorter stays of up to five nights. The majority would emanate from mainland UK (or domestic) markets and European markets (to a lesser extent).

Amateur golf tournaments are very attractive to such four-balls, who then get to play in organised events and meet other golf travellers and local golfers, both on and off the course.
Couples Golf
A rapidly expanding sector of the golf holiday market worldwide. Predominantly from European markets for golf destinations in Ireland, particularly Germany and the Netherlands which has the highest worldwide percentage of registered female golfers.

This market also incorporates a smaller section where only one of the couple plays golf. In such cases, the primary motivation is not the golf, but the choice of Ireland is still impacted by the ready availability of accessible golf and its reputation as a premier golf destination.

It would appear that the couples segment in Europe is under-marketed and could represent a sector ripe for considerable growth, particularly considering:

- The entire island of Ireland is equally marketable to couples
- Couples look for the more traditional holiday elements as well as golf, both of which Ireland can deliver abundantly.
- Couples are generally less demanding on the quality or fame of the courses, providing the accommodation and location offer a great Irish experience
- More isolated golf resorts (less appealing to avid golfers who require a cluster of courses) can attract couples who are more open to playing the same course on more than one occasion, providing the accommodation is attractive
- Spa and relaxation, as well as other activities that can be enjoyed by both partners or just by one partner, become an asset to the destination’s promotion
- Great scenery, tranquil settings, special places, cozy restaurants and great gastronomy are all sales points and will resonate with many hotels and golf courses in both Northern Ireland and Ireland
- Golf destinations which offer easy access for walking, sightseeing, golf and culture can successfully promote to this segment

Society Golf
A specific section of the group golf category (and one particularly relevant to Ireland), society golf groups comprise golfers who belong to the same golf club or society and who like to travel together, usually on a regular basis.

These will generally be a mix of men, women, couples and singles who already know each other travelling from the same place. These are generally larger groups (16 to 40 people) requiring more coordination.

Corporate Golf
Corporate golf can cover a range of business-related travel where golf is unlikely to be the primary motivation. These include business travellers who enjoy golf, conferences with a golf day and incentives based around golf activities. The product suitable for such trips is often different to the hotels and golf courses demanded by avid golfers, value golf seekers and couples, opening up opportunities to business hotels with adjacent or nearby parkland courses of a decent standard.

Corporate golf also includes high-net-worth businesspeople from the UK and Europe who may travel for a couple of days’ golf, with or without clients.
## Appendix 3 Northern Ireland Golf Tourism SWOT Analysis

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
<th>Opportunities</th>
<th>Threats</th>
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</thead>
<tbody>
<tr>
<td>• Two of world’s top golf courses</td>
<td>• Golf clubs’ capacity and capabilities</td>
<td>• Regional golf open tournaments</td>
<td>• Industry fragmented and continues to work in isolation</td>
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<tr>
<td>• 11 links courses</td>
<td>• Golf clubs’ limited resources, both financial and human</td>
<td>• Golf club open competitions</td>
<td>• Lack of support and buy-in from clubs and key stakeholders</td>
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<tr>
<td>• Royal Portrush on The Open roster from 2019</td>
<td>• Governance and membership issues for golf clubs</td>
<td>• Increased online tee booking</td>
<td>• Funding constraints leading to withdrawal of support for Irish Open and loss of public awareness of Northern Ireland as a leading golf and events destination</td>
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<tr>
<td>• The Irish Open in 2015 and 2017</td>
<td>• Cumbersome booking of golf packages</td>
<td>• Digital media for promotion of golf</td>
<td>• Increasing global competition</td>
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<tr>
<td>• The annual Northern Irish Open</td>
<td>• Limited value golf break offers on OTAs</td>
<td>• More parkland courses promoting their product on intermediary golf websites</td>
<td>• Costs versus similar destinations in Ireland and UK</td>
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<tr>
<td>• Home of Champions – Rory McIlroy, Graeme McDowell, Darren Clarke</td>
<td>• Capacity for growth in visitor rounds at some of the most desirable links courses</td>
<td>• Developing regional clusters to work together for collaborative marketing</td>
<td>• Regional golf open tournaments</td>
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<tr>
<td>• The friendliness and welcome of the people</td>
<td>• No dedicated ‘one-stop shop’ website for the growing number of independent golf travellers</td>
<td>• Links golf resort developments</td>
<td>• Golf club open competitions</td>
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<tr>
<td>• The 19th hole, pubs and ‘craic’ factor</td>
<td>• Lack of awareness of good value, parkland and other links courses from the GB and European markets</td>
<td>• Club manager development programmes</td>
<td>• Increased online tee booking</td>
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<tr>
<td>• Complementary heritage, food and accommodation</td>
<td>• Lack of suitable accommodation in some key locations</td>
<td>• Spring and autumn golf from key markets</td>
<td>• Digital media for promotion of golf</td>
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<td>• Proximity to Dublin Airport</td>
<td>• Costs versus similar destinations in Ireland and UK</td>
<td>• Cross-border itineraries and initiatives</td>
<td>• More parkland courses promoting their product on intermediary golf websites</td>
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<tr>
<td>• Spread of courses in key geographical locations – Causeway, Down, Fermanagh</td>
<td>• Lack of focus on cross-border itineraries</td>
<td>• Improved market information and intelligence</td>
<td>• Developing regional clusters to work together for collaborative marketing</td>
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<td>• Variety and good conditioning of golf courses</td>
<td>• Air access limitations to Northern Ireland has marketing implications by geography/segment</td>
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<td>• Links golf resort developments</td>
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<td>• Irish diaspora in the USA and Canada are interested to experience the homeland of their ancestry</td>
<td>• Perception as an expensive destination – trophy course green fees</td>
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<td>• Club manager development programmes</td>
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<td></td>
<td>• Lack of service levels and facilities at clubs</td>
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<td>• Spring and autumn golf from key markets</td>
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Appendix 4 Major Golf Events

The Ryder Cup

The Ryder Cup is now one of the world’s largest sporting events. It is broadcast to 183 countries worldwide via a network of 43 international broadcasters reaching more than half a billion homes on each day of the competition. Approximately 45,000 spectators from 75 countries across the world are expected to attend daily during the event.

This translates into direct benefits; not only to golf and tourism but to wider commercial benefits for a country and its industry.

Great Britain and Ireland have hosted three of the recent Ryder Cups:

- Ireland 2006
- Wales 2010
- Scotland 2014

The next open date for European countries to bid for The Ryder Cup is 2022: six countries have already expressed their interest to host the event. Therefore the next open date to consider bidding for would be 2026.

Ireland

- €143 million (£112.5 million) generated from the event – a 32% increase on the impact of The 2002 Ryder Cup in England and an 80% increase on that of The 1997 Ryder Cup in Spain.
- An additional 90,000 overseas visitors holidayed in Ireland in September 2006, compared to the same month the previous year, with a majority attending The Ryder Cup.
- In addition to three days’ attendance at The Ryder Cup, visitors from America stayed in Ireland for a further 4.7 days, while other overseas visitors stayed for an additional three days.
- The IAGTO GTO research identified that Ireland did not achieve the longer-term benefits experienced by Wales and Scotland of hosting The Ryder Cup.

Wales

- £82.4 million economic impact.
- 77% of local golf club representatives interviewed after the event felt that golf tourism would increase in the long term in Wales as a result of hosting The 2010 Ryder Cup.
- Average number of days attended was 2.3 with a clear trend for overseas visitors to stay longer (average 3.3 days) and to come in larger groups. More than a third of spectators lived in Wales; over half were from elsewhere in the UK; and more than 10% were overseas visitors.
- The location of The Celtic Manor Resort on the border with England meant that many of those attending from / based in England were able to make daily visits rather than stay overnight. Loss of potential income to Wales came through:
  » Overnight accommodation stays in England, e.g. Bristol, Bath, Gloucester
  » Contractors, although sourcing as much as possible in Wales, being able to cost efficiently by transporting products and services from England into Wales
  » Hospitality groups using hotels in England and hosting additional evening events outside of Wales.
- The economic conditions did affect overall attitude to attendance, length of stay and extended stays, both for the public and the corporate sectors.
- An additional £2 million legacy fund supported 40 projects to develop public facilities and encouraged people to get into golf.

Scotland

- Economic impact due to be published in spring 2015.
- 250,000 people from 96 different countries attended The 2014 Ryder Cup at Gleneagles.
- 62% of general ticket holders came from outwith Scotland.
- 75,000 spectators passed through, and engaged in, the Scotland Welcomes the World Zone.
- Since 2003, more than 350,000 children have been introduced to golf at school through the junior golf initiative ClubGolf.
In 2014, the Scottish Government extended ClubGolf through the new Get into Golf initiative, with additional funding of up to £1 million over a four-year period.

The 2014 Junior Ryder Cup at Blairgowrie was hailed as the most successful in history with thousands of spectators attending.

14 Scottish companies were awarded Ryder Cup-related contracts.

17,000 people from 55 countries around the world applied for the 1,800 volunteer spaces.

VisitScotland’s Sky Sports ‘Brilliant Ryder Cup Moments’ campaign drew more than 33,000 entries – the largest single number of entries achieved by a golf campaign activity of this kind.

Between 2003 and September 2014, Scotland has invested £10.9m in golf events as part of The Ryder Cup event legacy programme. The 2014 Ryder Cup was the 55th supported golf tournament.

The Land of Food and Drink Showcase in the Spectator Village featured tastings of produce from more than 30 suppliers.

Sky Television and NBC were the host broadcasters for The 2014 Ryder Cup, providing footage for domestic and international broadcasters’ coverage through 50 global broadcasters, reaching more than 500 million homes in almost 200 territories around the world.

930 media personnel were based in the media centre, with a total of 2,000 accredited media on site.

Ricoh Women’s Open 2013 – St Andrews

- Economic impact £5.2 million
- Global media exposure £8.33 million
- 3,166 hours of global broadcasting
- 71% of all visitors (including those from elsewhere in Scotland) would return to Fife for a leisure visit based on their experiences during the 2013 Open
- Two-thirds of all visitors to Scotland expected to return within a year
- 40% of all spectators and 20% of those residing overseas planned to attend the next Scottish hosting of the Championship at Turnberry in 2015

Appendix 5 Information Sources

- IAGTO Golf Tour Operators survey
- KPMG Golf Travel Insights
- HSBC Golf Futures
- Sygenta Golf survey
- EventScotland / VisitScotland
- Fáilte Ireland
- Tourism Ireland
- University of Ulster Business School – Tom Cotter and Professor Peter Bolan
- R & A
- European Tour
- Tourism Northern Ireland Golf Monitor
- Visit Wales
- Runkerry Development Economic Impact (Michael Smith (Feb 2011))
- Hudson & Hudson
- Economic Impact Sport in Northern Ireland (Henley Centre)
- Economic Impact Irish Open (Cogent)
- The Links of Ireland, Peper and Campbell
- CGI
- Mintel Outdoor Adventure Tourism – Ireland

The Solheim Cup 2013 – Killeen Castle, Ireland

- Economic impact €23 million
- €14 million media exposure
- 85,000 spectators attended the event, of which
  - 17% were from overseas
  - And of which more than half had travelled from the USA
  - Overseas visitors spent at least four days in Ireland on average
  - 1,200 hours of media coverage broadcast globally to an audience of 7.6 million (an 87% increase over 2007 event)
  - Featured in 2,361 print articles and 6,115 online articles
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