GOLF TOURISM IN NORTHERN IRELAND | 2016

Results Presentation
February 2017
STATE OF GOLF IN THE UK
Average number of Rounds Played per course in each month ~ 2011-2016
2016 PARTICIPATION: GB FULL LENGTH COURSE USERS

Adults who have played on a full length golf course (9 or 18 hole) at least once in the last 12 months.

=5.3% of the GB adult population
GB: ‘CORE’ GOLFERS

Adults who have played on a full length golf course (9 or 18 hole) at least once in the last 12 months.

- 2016 = 1,172,000 = 42% of full course users
- 2015 = 1,377,000 = 44% of full course users
- 2014 = 1,514,000 = 46% of full course users

Two year rolling average
NITB GOLF TOURISM MONITOR
OVERVIEW OF THE PROJECT

Monitor introduced in 2013

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

To better understand who the Northern Ireland golf tourist is

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

Evaluation of the golf tourism market in Northern Ireland

Strategic insight into the golf tourist travelling to Northern Ireland

Identify key markets or opportunities for tourism growth

Understand how likely golfers are to return both as players and spectators

Understand what golfers thought of their trip to Northern Ireland
THE PROGRAMME

The tourism monitor is comprised of three main sources of measurement:

- Visitor Interviews
- Monitor of Rounds Played
- Benchmark Study

We have gathered information on:

- Clubs and Facilities
- Visitors and Rounds Played
- Golf Holiday trends
- Expenditure on golf tourism
THE PROGRAMME

- **Rounds Played**
  - 21 clubs submitted data for the peak golfing season.
    - This is consistent with 2015
  - Data was submitted either online at [www.nitbgolf.net](http://www.nitbgolf.net) or via an SMS INC spreadsheet emailed to courses.

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

- The Economic Impact of golf tourism for Northern Ireland in 2016 remaining in Northern Ireland is:
  
  
  2016 = £35,600,000  
  2015 = £32,100,000  
  2014 = £33,200,000  
  2013 = £27,000,000  

- The number of golfing visitors to Northern Ireland is:
  
  2016 = 122,200  
  2015 = 139,300  
  2014 = 139,300  
  2013 = 134,300
KEY FINDINGS

- The Economic Impact of golf tourism from non-domestic golfers overnight for Northern Ireland in 2016 is:

  2016 = £27,200,000
  2015 = £24,200,000
  2014 = £24,200,000
  2013 = £22,200,000

- The number of non-domestic overnight golfing visitors to Northern Ireland is:

  2016 = 21,800
  2015 = 17,400
  2014 = 18,900
  2013 = 16,600
KEY FINDINGS

- Golf tourism to Northern Ireland is holding strong at a time where golf participation continues to fall in the key established golf markets. Golf participation in the UK is at its lowest in 20 years and this is reflected in the fact that the number of Northern Irish golfers is down on last year.

- North America is crucial to the total economic impact of golf tourism in Northern Ireland, although the reliance on this has reduced in 2016.

- The number of UK and European visitors has increased considerably in 2016 and evidence would suggest that these golfers are treating their trip to Northern Ireland as wider than purely a golf break with many citing the desire to visit tourist attractions and enjoy the warm Irish welcome.
BREAKDOWN OF OVERNIGHT VS DAY VISITOR REVENUE

OVERNIGHT VISITOR TOTAL EXPENDITURE

- 2013: £22,400,000
- 2014: £26,900,000
- 2015: £25,600,000
- 2016: £28,600,000

DAY VISITOR TOTAL EXPENDITURE

- 2013: £4,600,000
- 2014: £6,300,000
- 2015: £6,500,000
- 2016: £7,000,000
TOTAL EXPENDITURE 2016 – OVERNIGHT VISITORS

<table>
<thead>
<tr>
<th>Region</th>
<th>Total Expenditure (£)</th>
<th>Number of Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>NI</td>
<td>1,397,000</td>
<td>7,200</td>
</tr>
<tr>
<td>ROI</td>
<td>2,832,000</td>
<td>5,500</td>
</tr>
<tr>
<td>Rest of UK</td>
<td>3,958,000</td>
<td>5,400</td>
</tr>
<tr>
<td>Europe</td>
<td>4,533,000</td>
<td>2,800</td>
</tr>
<tr>
<td>North America</td>
<td>14,894,000</td>
<td>7,800</td>
</tr>
<tr>
<td>Rest of World</td>
<td>975,000</td>
<td>300</td>
</tr>
</tbody>
</table>
ORIGIN OF TOTAL ROUNDS PLAYED BY QUARTER - EXCLUDING DOMESTIC
CONSUMER INTERVIEWS
VISITOR TYPE

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

- **Individual green fee**: 52%
- **Small Society (less than 10 players)**: 23%
- **Guest of a member**: 12%
- **Medium Society (10-20 players)**: 10%
- **Large Society (over 20 players)**: 3%

**On a short break/holiday where golf is part of the trip**

**On a short break/holiday where the main purpose is to play golf**

**Day Visitor (coming from home)**
PLAYING GOLF IN NORTHERN IRELAND

Q – Have you played golf in Northern Ireland before?

- ROI (65)
- Rest of UK (87)
- Europe (40)
- USA/Canada (88)
- Rest of World (25)
- Overall (305)
TODAY’S GOLF - BOOKING

- **Online tee booking website**: 36% (ROI), 31% (UK), 36% (Europe), 32% (USA/Canada), 18% (Rest of World), 29% (Overall)

- **Through a tour operator**: 24% (ROI), 5% (UK), 13% (Europe), 13% (USA/Canada), 5% (Rest of World), 13% (Overall)

- **Through a member**: 61% (ROI), 29% (UK), 11% (Europe), 9% (USA/Canada), 0% (Rest of World), 9% (Overall)

- **Directly with golf course**: 16% (ROI), 29% (UK), 6% (Europe), 6% (USA/Canada), 9% (Rest of World), 6% (Overall)

- **Just turned up**: 28% (ROI), 10% (UK), 9% (Europe), 9% (USA/Canada), 11% (Rest of World), 9% (Overall)

- **Through accommodation operator**: 1% (ROI), 8% (UK), 6% (Europe), 6% (USA/Canada), 8% (Rest of World), 6% (Overall)
ACCOMMODATION

- 4* or more hotel
- With friends/family
- 3* hotel
- Guest House
- Bed & Breakfast

Overall:
- 4* or more hotel: 37%
- With friends/family: 20%
- 3* hotel: 16%
- Guest House: 15%
- Bed & Breakfast: 12%

ROI:
- 4* or more hotel: 30%
- With friends/family: 13%
- 3* hotel: 20%
- Guest House: 20%
- Bed & Breakfast: 17%

Rest of UK:
- 4* or more hotel: 36%
- With friends/family: 17%
- 3* hotel: 20%
- Guest House: 15%
- Bed & Breakfast: 9%

Europe:
- 4* or more hotel: 39%
- With friends/family: 20%
- 3* hotel: 15%
- Guest House: 17%
- Bed & Breakfast: 9%

North America:
- 4* or more hotel: 69%
- With friends/family: 7%
- 3* hotel: 7%
- Guest House: 4%
- Bed & Breakfast: 0%

Rest of World:
- 4* or more hotel: 32%
- With friends/family: 20%
- 3* hotel: 20%
- Guest House: 0%
- Bed & Breakfast: 0%
COURSES & ROUNDS IN NORTHERN IRELAND
OUT OF STATE OVERNIGHT VISITORS

Q – How many courses (including this one) are you expecting to visit/did you visit in Northern Ireland on your current golf break?
How many rounds of golf are you expecting to play/did you play in Northern Ireland on your current golf break?
COURSE RATINGS

Please rate the following aspects of your course…

- **Ease of booking**: Excellent (97%)
- **Customer service**: Excellent (87%)
- **Value for money**: Excellent (83%)
- **Overall course facilities**: Excellent (83%)
- **Overall clubhouse facilities**: Excellent (81%)

The mean ratings are: Easy of booking (5.0), Customer service (4.9), Value for money (4.8), Overall course facilities (4.8), Overall clubhouse facilities (4.8).
RETURNING TO THE COURSE IN THE FUTURE

Do you intend to return to the course (where you were interviewed) in the future?

- Yes on this visit: 1%
- Yes would hope to do so in the future: 34%
- Undecided - no plans as yet: 10%
- No: 55%
NORTHERN IRELAND VS. OTHER COUNTRIES: VALUE FOR MONEY

England: 24% NI is much better, 4.4 Mean
Wales: 53% NI is much better, 4.2 Mean
Portugal: 52% NI is a little better, 4.0 Mean
Spain: 47% NI is about the same, 4.0 Mean
ROI: 17% NI is a little worse, 3.8 Mean
Scotland: 15% NI is much worse, 3.8 Mean
USA: 36% NI is much better, 3.3 Mean

Don't know: 46% England, 22% Wales, 22% Portugal, 24% Spain, 17% ROI, 15% Scotland, 1% USA
NORTHERN IRELAND VS. OTHER COUNTRIES: OVERALL ENJOYMENT

![Bar chart showing the comparison of enjoyment between Northern Ireland and other countries.](chart.png)
GOLFERS VS TOURISTS

Do you intend to visit any tourist attractions whilst in Northern Ireland?

Overall

- Yes: 65%
- No: 20%
- Don't know: 15%

Region-wise distribution:

- ROI:
  - Yes: 34%
  - No: 45%
  - Don't know: 21%

- Rest of UK:
  - Yes: 45%
  - No: 33%
  - Don't know: 21%

- Europe:
  - Yes: 86%
  - No: 11%

- North America:
  - Yes: 84%
  - No: 13%
If you were returning to Northern Ireland for a Golf Holiday, would you be interested in purchasing a Northern Ireland Golf Pass which allowed you to play a selection of courses in a particular region of the country for a given price, including accommodation? 

If you were buying a Northern Ireland Golf Pass or Golf Cluster Pass, what would be the main factors in your decision?

- **Price**: 71% Yes, 50% Maybe, 3% No
- **Courses included**: 61% Yes, 42% Maybe, 9% No
- **Food/drink included**: 44% Yes, 31% Maybe, 19% No
- **Quality of accommodation**: 48% Yes, 37% Maybe, 14% No
- **A mix of course types (e.g. Links/parkland)**: 44% Yes, 40% Maybe, 10% No
- **Inclusion of non-golf activities**: 48% Yes, 37% Maybe, 14% No
- **Only links courses included**: 48% Yes, 37% Maybe, 14% No
CHOOSING NORTHERN IRELAND

Q – Do you know what influenced you / the decision organiser to choose Northern Ireland?
## CHOOSING NORTHERN IRELAND | Top 10

<table>
<thead>
<tr>
<th></th>
<th>ROI</th>
<th>UK</th>
<th>Europe</th>
<th>USA / Canada</th>
<th>R.O.W</th>
</tr>
</thead>
<tbody>
<tr>
<td>Good courses</td>
<td>60%</td>
<td>46%</td>
<td>53%</td>
<td>65%</td>
<td>40%</td>
</tr>
<tr>
<td>Hospitality / people</td>
<td>23%</td>
<td>32%</td>
<td>43%</td>
<td>51%</td>
<td>52%</td>
</tr>
<tr>
<td>Awareness of NI major champions</td>
<td>32%</td>
<td>18%</td>
<td>45%</td>
<td>34%</td>
<td>20%</td>
</tr>
<tr>
<td>Good value</td>
<td>31%</td>
<td>23%</td>
<td>30%</td>
<td>24%</td>
<td>12%</td>
</tr>
<tr>
<td>Previous experience</td>
<td>32%</td>
<td>30%</td>
<td>15%</td>
<td>24%</td>
<td>4%</td>
</tr>
<tr>
<td>Good facilities</td>
<td>25%</td>
<td>24%</td>
<td>15%</td>
<td>24%</td>
<td>20%</td>
</tr>
<tr>
<td>Internet</td>
<td>12%</td>
<td>9%</td>
<td>40%</td>
<td>37%</td>
<td>8%</td>
</tr>
<tr>
<td>Visit Family &amp; friends</td>
<td>8%</td>
<td>34%</td>
<td>23%</td>
<td>8%</td>
<td>52%</td>
</tr>
<tr>
<td>Word of Mouth / Recommendation</td>
<td>17%</td>
<td>20%</td>
<td>25%</td>
<td>21%</td>
<td>16%</td>
</tr>
<tr>
<td>Accessibility</td>
<td>25%</td>
<td>18%</td>
<td>10%</td>
<td>8%</td>
<td>–</td>
</tr>
</tbody>
</table>
Q – Apart from today’s golf, what were your main one or two highlights on this trip?

- Scenery: 60%
- Irish hospitality: 56%
- Welcome: 44%
- Irish pubs (e.g., Bushmills, Guiness): 42%
- Courses that NI champs played & grew up on: 39%
- Chance to see non golf landmarks: 37%
- Good food: 35%
- Chance to play a course on the European Tour: 33%
- Chance to play a future Open venue: 27%
- Links courses: 27%
- Venue of the Irish Open: 26%
- Good value for money: 26%
- Short flight from rest of UK: 20%
- Other: 9%
## TRIP HIGHLIGHTS | Top 10

<table>
<thead>
<tr>
<th></th>
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<th>USA / Canada</th>
<th>R.O.W</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scenery</td>
<td>43%</td>
<td>47%</td>
<td>71%</td>
<td>76%</td>
<td>72%</td>
</tr>
<tr>
<td>Irish hospitality</td>
<td>25%</td>
<td>56%</td>
<td>59%</td>
<td>73%</td>
<td>68%</td>
</tr>
<tr>
<td>Welcome</td>
<td>40%</td>
<td>41%</td>
<td>41%</td>
<td>52%</td>
<td>36%</td>
</tr>
<tr>
<td>Irish Drinks</td>
<td>12%</td>
<td>47%</td>
<td>51%</td>
<td>45%</td>
<td>76%</td>
</tr>
<tr>
<td>Staff Friendliness</td>
<td>37%</td>
<td>38%</td>
<td>37%</td>
<td>47%</td>
<td>16%</td>
</tr>
<tr>
<td>Courses that NI champs played &amp; grew up on</td>
<td>32%</td>
<td>40%</td>
<td>49%</td>
<td>27%</td>
<td>48%</td>
</tr>
<tr>
<td>Chance to see non golf landmarks</td>
<td>23%</td>
<td>28%</td>
<td>49%</td>
<td>37%</td>
<td>64%</td>
</tr>
<tr>
<td>Good food</td>
<td>34%</td>
<td>30%</td>
<td>34%</td>
<td>32%</td>
<td>44%</td>
</tr>
<tr>
<td>Chance to play a course on the European Tour</td>
<td>23%</td>
<td>20%</td>
<td>46%</td>
<td>29%</td>
<td>28%</td>
</tr>
<tr>
<td>Chance to play a future Open venue</td>
<td>31%</td>
<td>21%</td>
<td>34%</td>
<td>25%</td>
<td>28%</td>
</tr>
</tbody>
</table>
Q – What influence is it that Portrush is holding The Open in 2019?
THE TYPICAL OUT OF STATE VISITOR

- Takes between 1 and 2 golf holidays a year.
- Books golf rounds though an online tee booking website.
- Has previously visited Northern Ireland for a golf break.
- Is impressed enough with the experience to hope to return to the same golf course in the future.
- Intends to visit only Northern Ireland.
- The average out of state, overnight visitor will visit 3 courses on their trip, and play 4 rounds.
- The average out of state, overnight visitor spent £2,038 on their golf break, an average of £268 per day.
INTERNATIONAL TOURISM RESEARCH

What would be the main factors in your decision to choose Northern Ireland as a golfing destination? (Sweden)

- Good quality courses: 49%
- Good courses close together: 44%
- Visiting a new country: 36%

What would be the main factors in your decision NOT to choose Northern Ireland as a golfing destination? (Sweden)

- Climate: 64%
- Visiting a new country: 30%
- Poor value for money for golf: 18%

How would you rate the following countries as a golf holiday destination in terms of value for money? (Germany)

- Republic of Ireland: Mean = 3.2
- Scotland: Mean = 3.1
- Northern Ireland: Mean = 3.0
- Wales: Mean = 3.0
- England: Mean = 3.0

- Very poor
- Poor
- Neither
- Good
- Very good