GOLF TOURISM IN NORTHERN IRELAND | 2018

Results Presentation – March 2019
STATE OF GOLF IN THE UK
STATE OF GOLF IN THE UK

Average number of Rounds Played per course in each month ~ 2014–2018

- 2015
- 2016
- 2017
- 2018
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

Identify key markets or opportunities for tourism growth

Strategic insight into the golf tourist travelling to Northern Ireland

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

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

▪ Rounds Played
  – 24 clubs submitted data for the peak golfing season.
    • This is more than in 2017
  – Data was submitted either online at www.nitbgolf.net or via an SMS INC.
    spreadsheet emailed to courses

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

- The Economic Impact of golf tourism for Northern Ireland in 2018 is:

  2018 = £42,600,000
  2017 = £39,900,000
  2016 = £35,600,000
  2015 = £32,100,000
  2014 = £33,200,000

- The number of golfing visitors to Northern Ireland is:

  2018 = 124,600
  2017 = 123,200
  2016 = 122,200
  2015 = 139,300
  2014 = 139,300
KEY FINDINGS

- The Economic Impact of golf tourism from non-domestic overnight golfers for Northern Ireland in 2018 is:
  - 2018 = £31,500,000
  - 2017 = £29,900,000
  - 2016 = £27,200,000
  - 2015 = £24,200,000
  - 2014 = £24,200,000

- The number of non-domestic overnight golfers to Northern Ireland is:
  - 2018 = 18,000
  - 2017 = 16,900
  - 2016 = 21,800
  - 2015 = 17,400
  - 2014 = 18,900
VOLUME AND VALUE OF GOLF TOURISM
OVERNIGHT VS DAY VISITOR REVENUE

OVERNIGHT VISITOR TOTAL EXPENDITURE

2014: £29,600,000
2015: £25,600,000
2016: £28,600,000
2017: £31,100,000
2018: £33,600,000

DAY VISITOR TOTAL EXPENDITURE

2014: £6,300,000
2015: £6,500,000
2016: £7,000,000
2017: £8,900,000
2018: £9,000,000
TOTAL EXPENDITURE

<table>
<thead>
<tr>
<th>Region</th>
<th>Total Expenditure</th>
<th>Number of Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>NI</td>
<td>2,000,000</td>
<td>7600</td>
</tr>
<tr>
<td>ROI</td>
<td>2,300,000</td>
<td>3500</td>
</tr>
<tr>
<td>Rest of UK</td>
<td>3,800,000</td>
<td>4100</td>
</tr>
<tr>
<td>Europe</td>
<td>3,200,000</td>
<td>2200</td>
</tr>
<tr>
<td>North America</td>
<td>20,300,000</td>
<td>7800</td>
</tr>
<tr>
<td>Rest of World</td>
<td>1,900,000</td>
<td>500</td>
</tr>
</tbody>
</table>

© SPORTS MARKETING SURVEYS INC. April 24, 2019
TOTAL EXPENDITURE – OVERNIGHT VISITORS

- **2016**
  - Northern Ireland: £1,397,000
  - R.O.I: £2,832,000
  - UK: £3,958,000
  - Europe: £4,533,000
  - N. Am: £975,000

- **2017**
  - Northern Ireland: £1,150,000
  - R.O.I: £2,341,000
  - UK: £2,711,000
  - Europe: £4,867,000
  - N. Am: £1,647,000

- **2018**
  - Northern Ireland: £2,023,000
  - R.O.I: £2,303,000
  - UK: £3,804,000
  - Europe: £3,225,000
  - N. Am: £1,904,000
  - R.O.W: £20,300,000
TOTAL VISITORS – OVERNIGHT VISITORS

- **2016**
  - Northern Ireland: 7,200
  - R.O.I: 5,500
  - UK: 5,400
  - Europe: 2,800
  - N. Am: 300
  - R.O.W: 300

- **2017**
  - Northern Ireland: 9,400
  - R.O.I: 4,300
  - UK: 3,300
  - Europe: 2,100
  - N. Am: 400
  - R.O.W: 400

- **2018**
  - Northern Ireland: 7,600
  - R.O.I: 3,500
  - UK: 4,100
  - Europe: 2,300
  - N. Am: 500
  - R.O.W: 500
CONSUMER FEEDBACK
CONSUMER FEEDBACK | Interviewee Profile

North America 28%
Rest of World 7%
Rep. of Ireland 21%
Rest of UK 35%
Europe 9%
CONSUMER FEEDBACK | Feedback Type

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

<table>
<thead>
<tr>
<th>Year</th>
<th>ROI</th>
<th>UK</th>
<th>Europe</th>
<th>USA/Canada</th>
<th>Rest of World</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>33%</td>
<td>32%</td>
<td>64%</td>
<td>47%</td>
<td>24%</td>
</tr>
<tr>
<td>2018</td>
<td>44%</td>
<td>62%</td>
<td>83%</td>
<td>54%</td>
<td>92%</td>
</tr>
</tbody>
</table>

- 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)
CONSUMER FEEDBACK | Playing in NI

Q: Have you played golf in NI before?

- Yes within the last year:
  - ROI (89): 56%
  - UK (116): 2%
  - Europe (23): 17%
  - N Am (52): 32%
  - ROW (14): 3%
  - Overall (294): 9%

- Yes within the last 5 years:
  - ROI (89): 46%
  - UK (116): 1%
  - Europe (23): 65%
  - N Am (52): 37%
  - ROW (14): 14%
  - Overall (294): 31%

- Yes more than 5 years ago:
  - ROI (89): 7%
  - UK (116): 8%
  - Europe (23): 31%
  - N Am (52): 36%
  - ROW (14): 26%
  - Overall (294): 21%

- Never:
  - ROI (89): 9%
  - UK (116): 9%
  - Europe (23): 31%
  - N Am (52): 36%
  - ROW (14): 26%
  - Overall (294): 21%
CONSUMER FEEDBACK | Booking today's round

Q: Do you know how your booking was made?

- Through a member: ROI 25%, UK 21%, Europe 23%, N Am 4%, ROW 6%, Overall 7%
- Directly with golf course: ROI 24%, UK 21%, Europe 11%, N Am 4%, ROW 3%, Overall 7%
- Through a tour operator: ROI 43%, UK 45%, Europe 30%, N Am 10%, ROW 12%, Overall 11%
- Online tee booking website: ROI 12%, UK 26%, Europe 16%, N Am 16%, ROW 6%, Overall 17%
- Just turned up: ROI 30%, UK 29%, Europe 20%, N Am 17%, ROW 7%, Overall 17%
- Through accommodation operator: ROI 2%, UK 13%, Europe 6%, N Am 13%, ROW 2%, Overall 6%
- Don't know: ROI 2%, UK 4%, Europe 7%, N Am 2%, ROW 2%, Overall 7%
CONSUMER FEEDBACK | Accommodation

Q: What type of accommodation are you staying in?

- Visitors from North America and Europe are more likely to stay in a 4* hotel than those from ROI or the UK — these visitors are more likely to be staying with a friends or at a bed and breakfast.
CONSUMER FEEDBACK | Rounds & Courses Played

Q: How many courses / rounds are you expecting to visit / play in NI on your current golf break?
CONSUMER FEEDBACK | Course Ratings

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

- Ease of booking: 84% Excellent, 15% Good, 0% Average, 0% Poor, 0% Very Poor, Mean 4.8
- Customer service: 81% Excellent, 18% Good, 0% Average, 0% Poor, 0% Very Poor, Mean 4.8
- Value for money: 74% Excellent, 24% Good, 0% Average, 0% Poor, 0% Very Poor, Mean 4.7
- Overall clubhouse facilities: 71% Excellent, 28% Good, 0% Average, 0% Poor, 0% Very Poor, Mean 4.7
- Overall course facilities: 70% Excellent, 28% Good, 0% Average, 0% Poor, 0% Very Poor, Mean 4.7
CONSUMER FEEDBACK | Returning to NI

Q: On a scale of 1–5, how likely is it that you will return to NI for golf?

- In the next year
- In the next 2–3 years
- In the next 3 years of more

<table>
<thead>
<tr>
<th>Region</th>
<th>In the next year</th>
<th>In the next 2–3 years</th>
<th>In the next 3 years of more</th>
</tr>
</thead>
<tbody>
<tr>
<td>ROI</td>
<td>4.4</td>
<td>4.7</td>
<td>4.8</td>
</tr>
<tr>
<td>UK</td>
<td>4.1</td>
<td>4.7</td>
<td>4.9</td>
</tr>
<tr>
<td>Europe</td>
<td>1.7</td>
<td>3.2</td>
<td>4.5</td>
</tr>
<tr>
<td>North America</td>
<td>2.0</td>
<td>2.4</td>
<td>4.7</td>
</tr>
<tr>
<td>ROW</td>
<td>1.0</td>
<td>1.8</td>
<td>4.4</td>
</tr>
</tbody>
</table>
CONSUMER FEEDBACK | Rating the golf

Q: How would you rate your golf experience in NI?

- **ROI**:
  - Excellent: 67%
  - Good: 32%
  - Average: 5.0
  - Poor: 2%
  - Very Poor: 1%
  - Mean: 5.0

- **UK**:
  - Excellent: 70%
  - Good: 28%
  - Average: 5.0
  - Poor: 2%
  - Very Poor: 1%
  - Mean: 5.0

- **Europe**:
  - Excellent: 100%
  - Good: 0%
  - Average: 5.0
  - Poor: 0%
  - Very Poor: 0%
  - Mean: 5.0

- **N Am**:
  - Excellent: 98%
  - Good: 2%
  - Average: 5.0
  - Poor: 0%
  - Very Poor: 0%
  - Mean: 5.0

- **ROW**:
  - Excellent: 100%
  - Good: 0%
  - Average: 5.0
  - Poor: 0%
  - Very Poor: 0%
  - Mean: 5.0
CONSUMER FEEDBACK | Rating the golf break overall

Q: How would you rate golf break in NI overall?
CONSUMER FEEDBACK | NI – Value for money

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

- Spain: 56% Don't know, 22% NI is much better, 18% NI is a little better, 17% About the same, 15% NI is a little worse, 10% NI is much worse
- England: 36% Don't know, 22% NI is much better, 20% NI is a little better, 14% About the same, 10% NI is a little worse, 9% NI is much worse
- Wales: 48% Don't know, 18% NI is much better, 14% NI is a little better, 10% About the same, 8% NI is a little worse, 2% NI is much worse
- Portugal: 31% Don't know, 20% NI is much better, 15% NI is a little better, 32% About the same, 38% NI is a little worse, 19% NI is much worse
- ROI: 20% Don't know, 15% NI is much better, 13% NI is a little better, 36% About the same, 38% NI is a little worse, 30% NI is much worse
- Scotland: 51% Don't know, 15% NI is much better, 13% NI is a little better, 36% About the same, 21% NI is a little worse, 19% NI is much worse
- USA: 3% Don't know, 38% NI is much better, 13% NI is a little better, 38% About the same, 19% NI is a little worse, 29% NI is much worse

Mean: 3.5
CONSUMER FEEDBACK | NI – Enjoyment

Q: How would you rate golf break in NI overall?

- England: 22% NI is much better, 44% NI is a little better, 14% About the same, 19% NI is a little worse, 11% NI is much worse, Mean 4.3
- Spain: 55% NI is much better, 24% NI is a little better, 7% About the same, 11% NI is a little worse, 10% NI is much worse, Mean 4.2
- Portugal: 62% NI is much better, 19% NI is a little better, 6% About the same, 11% NI is a little worse, 10% NI is much worse, Mean 4.1
- Wales: 49% NI is much better, 21% NI is a little better, 11% About the same, 19% NI is a little worse, 11% NI is much worse, Mean 4.1
- Scotland: 20% NI is much better, 14% NI is a little better, 38% About the same, 19% NI is a little worse, 7% NI is much worse, Mean 3.8
- USA: 51% NI is much better, 19% NI is a little better, 38% About the same, 18% NI is a little worse, 7% NI is much worse, Mean 3.8
- ROI: 31% NI is much better, 21% NI is a little better, 34% About the same, 18% NI is a little worse, 8% NI is much worse, Mean 3.7
CONSUMER FEEDBACK | Tourist Attractions

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

2018: 15% Yes, 11% Don't know, 74% No
2017: 20% Yes, 20% Don't know, 60% No
2016: 20% Yes, 15% Don't know, 65% No
2015: 32% Yes, 9% Don't know, 59% No
CONSUMER FEEDBACK | Choosing NI

Q: Do you know what influenced you / the organiser to choose NI?
CONSUMER FEEDBACK | Choosing NI

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

<table>
<thead>
<tr>
<th></th>
<th>ROI</th>
<th>UK</th>
<th>Europe</th>
<th>N Am</th>
<th>ROW</th>
</tr>
</thead>
<tbody>
<tr>
<td>Good courses</td>
<td>38%</td>
<td>49%</td>
<td>26%</td>
<td>57%</td>
<td>50%</td>
</tr>
<tr>
<td>Hospitality / people</td>
<td>23%</td>
<td>43%</td>
<td>52%</td>
<td>66%</td>
<td>86%</td>
</tr>
<tr>
<td>Awareness of NI major champions</td>
<td>38%</td>
<td>32%</td>
<td>61%</td>
<td>40%</td>
<td>64%</td>
</tr>
<tr>
<td>NI hosting the Open</td>
<td>30%</td>
<td>35%</td>
<td>78%</td>
<td>42%</td>
<td>64%</td>
</tr>
<tr>
<td>Previous experience</td>
<td>35%</td>
<td>37%</td>
<td>22%</td>
<td>34%</td>
<td>7%</td>
</tr>
<tr>
<td>Visit Family &amp; friends</td>
<td>36%</td>
<td>29%</td>
<td>17%</td>
<td>13%</td>
<td>43%</td>
</tr>
<tr>
<td>Good facilities</td>
<td>26%</td>
<td>28%</td>
<td>30%</td>
<td>25%</td>
<td>14%</td>
</tr>
<tr>
<td>Accessibility</td>
<td>27%</td>
<td>20%</td>
<td>17%</td>
<td>19%</td>
<td>7%</td>
</tr>
<tr>
<td>Good value</td>
<td>23%</td>
<td>20%</td>
<td>9%</td>
<td>9%</td>
<td>–</td>
</tr>
<tr>
<td>Good literature / media advertising</td>
<td>8%</td>
<td>11%</td>
<td>26%</td>
<td>38%</td>
<td>7%</td>
</tr>
</tbody>
</table>
CONSUMER FEEDBACK | Trip highlight

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

- Irish hospitality: 51%
- Chance to see non-golf landmarks: 48%
- Scenery: 46%
- Chance to play a course on the European Tour: 40%
- Irish Drinks: 38%
- Venue of the Irish Open: 38%
- Chance to play a future Open venue: 33%
- Staff Friendliness: 31%
- Courses that Nichamps played & grew up on: 30%
- Welcome: 27%
- Good food: 23%
- Links courses: 15%
- Short flight from rest of UK: 11%
- Good value for money: 10%
- Other: 1%
CONSUMER FEEDBACK | Choosing NI

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

<table>
<thead>
<tr>
<th></th>
<th>ROI</th>
<th>UK</th>
<th>Europe</th>
<th>N Am</th>
<th>ROW</th>
</tr>
</thead>
<tbody>
<tr>
<td>Irish hospitality</td>
<td>13%</td>
<td>65%</td>
<td>87%</td>
<td>64%</td>
<td>64%</td>
</tr>
<tr>
<td>Chance to see non golf landmarks</td>
<td>36%</td>
<td>41%</td>
<td>78%</td>
<td>64%</td>
<td>71%</td>
</tr>
<tr>
<td>Scenery</td>
<td>31%</td>
<td>42%</td>
<td>70%</td>
<td>60%</td>
<td>79%</td>
</tr>
<tr>
<td>Chance to play a course on the European Tour</td>
<td>35%</td>
<td>34%</td>
<td>74%</td>
<td>45%</td>
<td>50%</td>
</tr>
<tr>
<td>Irish Drinks (e.g. Bushmills/Guinness)</td>
<td>12%</td>
<td>39%</td>
<td>78%</td>
<td>53%</td>
<td>64%</td>
</tr>
<tr>
<td>Venue of the Irish Open</td>
<td>31%</td>
<td>33%</td>
<td>70%</td>
<td>42%</td>
<td>57%</td>
</tr>
<tr>
<td>Chance to play a future Open venue</td>
<td>27%</td>
<td>25%</td>
<td>83%</td>
<td>34%</td>
<td>57%</td>
</tr>
<tr>
<td>Staff Friendliness</td>
<td>46%</td>
<td>27%</td>
<td>17%</td>
<td>23%</td>
<td>21%</td>
</tr>
<tr>
<td>Courses that NI champs played &amp; grew up on</td>
<td>25%</td>
<td>23%</td>
<td>57%</td>
<td>34%</td>
<td>57%</td>
</tr>
<tr>
<td>Welcome</td>
<td>25%</td>
<td>28%</td>
<td>30%</td>
<td>26%</td>
<td>29%</td>
</tr>
</tbody>
</table>
CONSUMER FEEDBACK | The Open 2019

Q: Are you planning to attend The Open at Royal Portrush 2019?

- Planning to go
- Have already booked
- Not intending to go
- Don't know

<table>
<thead>
<tr>
<th>Region</th>
<th>Planning to go</th>
<th>Have already booked</th>
<th>Not intending to go</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northern Ireland</td>
<td>65%</td>
<td>23%</td>
<td>10%</td>
<td>12%</td>
</tr>
<tr>
<td>ROI</td>
<td>39%</td>
<td>38%</td>
<td>20%</td>
<td>12%</td>
</tr>
<tr>
<td>UK</td>
<td>41%</td>
<td>36%</td>
<td>19%</td>
<td>12%</td>
</tr>
<tr>
<td>Europe</td>
<td>17%</td>
<td>48%</td>
<td>48%</td>
<td>12%</td>
</tr>
<tr>
<td>USA/Canada</td>
<td>12%</td>
<td>60%</td>
<td>60%</td>
<td>12%</td>
</tr>
</tbody>
</table>
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 £2,481 on their golf break.
CONTACT DETAILS

SPORTS MARKETING SURVEYS INC.

The Courtyard, Wisley, Surrey, GU23 6QL
www.sportsmarketingsurveysinc.com
+44 (0)1932 345539

JOHN BUSHELL | MANAGING DIRECTOR
john.bushell@sportsmarketingsurveysinc.com

RICHARD PAYNE | DIRECTOR – SPORTS ACCOUNTS
richard.payne@sportsmarketingsurveysinc.com

SARAH CUSITION | SENIOR SPORTS RESEARCH EXECUTIVE
Sarah.cusition@sportsmarketingsurveysinc.com

© 2019 SPORTS MARKETING SURVEYS INC.
No part of this report may be reproduced or transmitted in any form or by any means, including photocopying, without the written permission of Sports Marketing Surveys Inc., any application for which should be addressed to Sports Marketing Surveys Inc. Written permission must also be obtained before any part of the report is stored in a retrieval system of any nature.

Disclaimer
Whilst proper due care and diligence has been taken in the preparation of this document, Sports Marketing Surveys Inc. cannot guarantee the accuracy of the information contained and does not accept any liability for any loss or damage caused as a result of using information or recommendations contained within this document.